



HubSync: How to use request links & share links

HubSync offers two secure link types for external document exchange. Both link types are created in HubSync using right-click options and customizable access settings.

Request links

are used to collect documents and files from external sources.

- They allow anyone with the link to upload files to a specified workspace folder after entering their name and email (and a predefined password, if enabled)
- Users can't view existing documents from the link.
 - Replaces "Click here to send me a file."

Share links

are used to share files externally with others.

- They allow external users to view specific files or folders (not entire workspaces) after entering their name, email, and predefined password.
- These links can be forwarded to third parties (e.g., bankers).
- Links replace the use of email attachments to share documents.

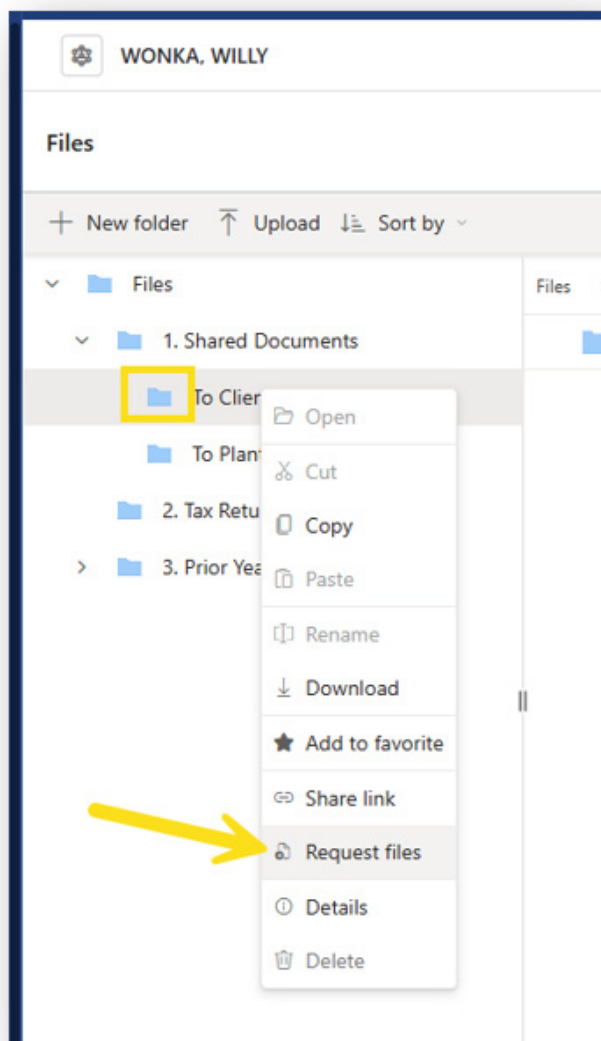
Features at a glance

Feature	Request links	Share links
Purpose	Collect files	Send files
Primary use	Request documents from third parties, such as financial advisors, brokers, bankers, attorneys, etc.	Send a tax return or document to a third party (e.g., banker).
What it communicates	"Please upload what we need here."	"Here's the document you need."
Document flow	External → HubSync	HubSync → external
HubSync account required	No	No
Access to workspace needed	No	No
View existing documents	No	Yes
Security controls	Expiration, password	Expiration, password
Can be revoked	Yes (expire/delete)	Yes (expire/delete)

Request links

How to create a request link

1. Create or navigate to the folder where you would like the documents to land.
Right-click and select “Request files.”



2. In the pop-up window, add a “Request Name” — this is what the user will see as a title for the request. You may also add an optional description to clarify the request.

Set the “Who can access this link” field to “Anyone (public, must enter name and email).” This option requires anyone who wants to add documents to provide their name and email address, allowing you to track who has accessed the link.

The “Set password” and “Set expiration” features can be toggled on or off as desired.

Once all required fields are complete, the “Create and Copy Link” button will turn blue and can be clicked to generate the link.

File Request

ⓘ This will create a link that allows anyone to upload what you're requesting without signing in.

Request Name (Required) ⓘ
Wonka's Documents Uploads

Description (optional) ⓘ

Who can access this link (Required)
Anyone (public, must enter a name and email) ▾

☐ Set password

☐ Set expiration

☒ Notify me when link is accessed

Cancel Create and Copy Link

If the password setting is enabled:

A user must enter a predefined password before they will be able to upload files.

The password must meet the specified criteria:

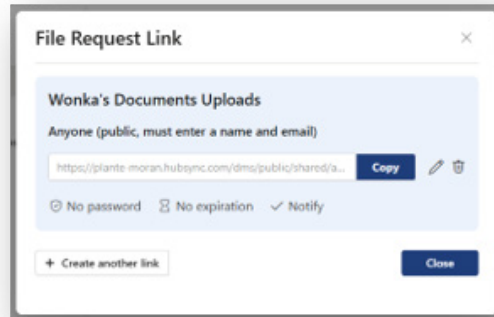
- Use letters and at least one number.
- Use special characters (e.g., @).
- Use a minimum of 8 characters.
- Use a mix of lowercase and uppercase letters.

Important:

Don't share the password with the recipient in the same message as the link. Share the link and password separately and privately, using different communication methods for additional protection.

Important:

3. Copy and share the link as needed.

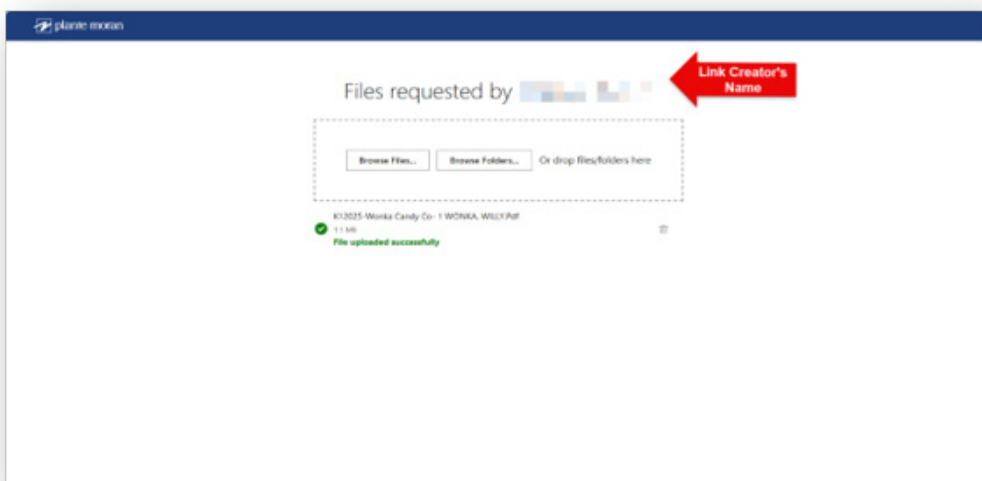


Using a request link

When a user clicks a request link, a browser window opens. The user will submit their email address, first and last name, predefined password (if required), and CAPTCHA to access the upload folder.



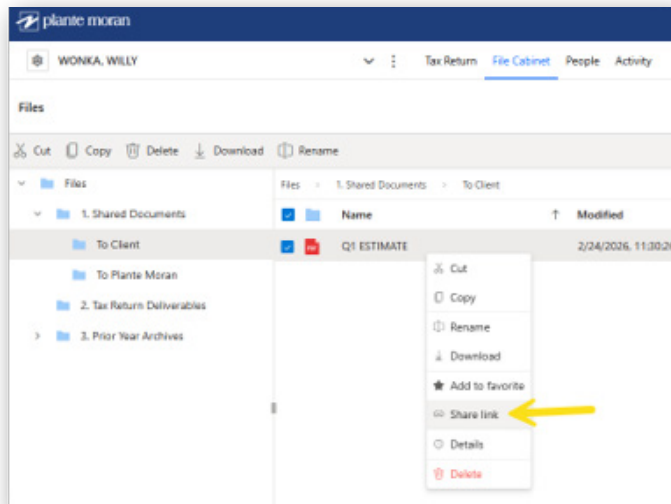
Users can then upload files. They won't be able to view any documents in the folder, nor will they be able to see what was previously uploaded during other upload sessions, regardless of who added them.



Share links

How to create a share link

1. Right-click on the document or folder you'd like to share, and then select "Share link."
2. In the pop-up window, set "Who can access this link" to "Anyone (public, must enter name and email)." This option requires anyone who wants to view the document or folder to provide their name and email address, allowing you to track who has accessed it.
3. Access to the document requires the user to input a predefined password. The password must satisfy the specified criteria:
 - Use letters and at least one number.
 - Use special characters (e.g., @).
 - Use a minimum of 8 characters.
 - Use a mix of lowercase and uppercase letters.



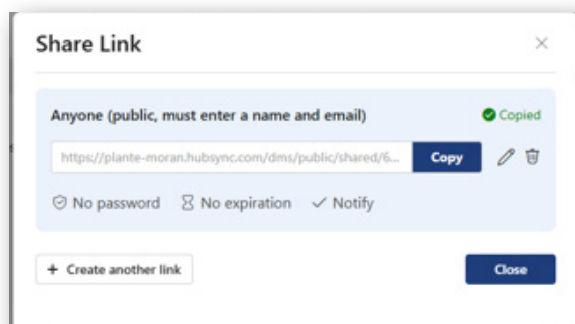
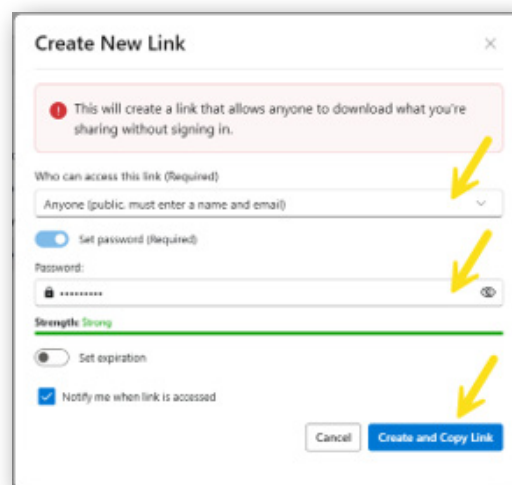
Important:

Don't share the password with the recipient in the same message as the link. Share the link and password separately and privately, using different communication methods for additional protection.

The "Set expiration" feature can be toggled on or off as desired.

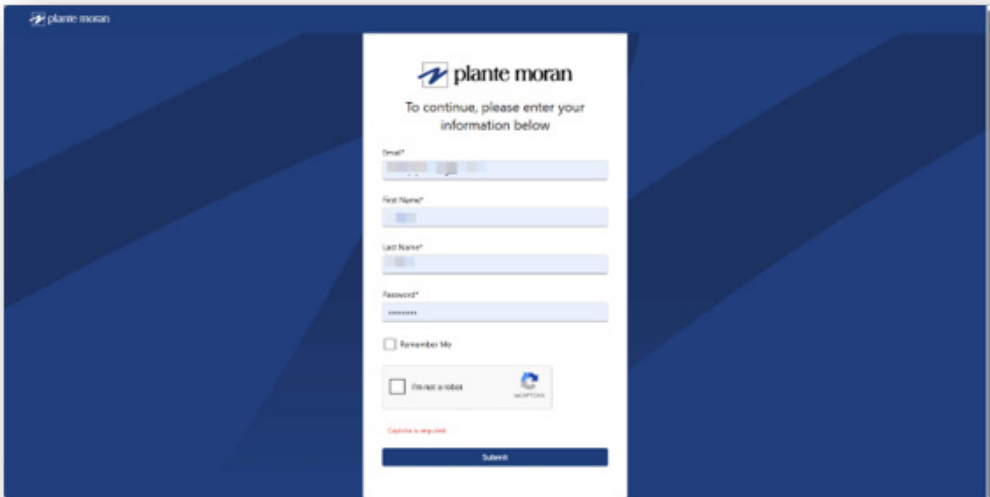
Once all required fields are complete, the "Create and Copy Link" button will turn blue and can be clicked to generate the link.

Copy and share the link as needed.



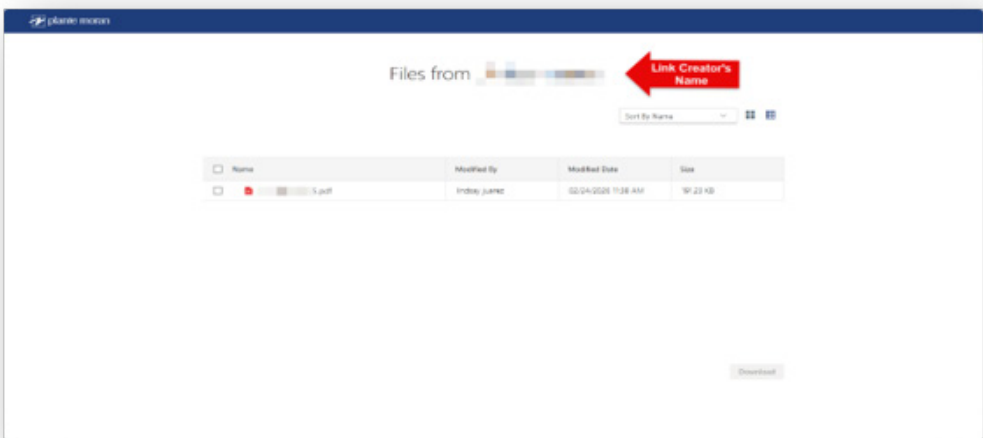
Using a share link

When a user clicks a share link, a browser window opens. The user will submit their email address, first and last name, predefined password, and CAPTCHA to access the document or folder.



The screenshot shows a login form for Plante Moran. The form is centered on a dark blue background with a subtle geometric pattern. The Plante Moran logo is at the top left of the form. The text "To continue, please enter your information below" is centered above the input fields. The fields are: Email*, First Name*, Last Name*, Password*, and a CAPTCHA section with a checkbox for "I'm not a robot" and a CAPTCHA image. There are checkboxes for "Remember Me" and "Continue as guest". A "Submit" button is at the bottom. A red error message "Continue is required" is visible below the CAPTCHA section.

Users can then see the shared file or folder.



The screenshot shows the file sharing interface. At the top, it says "Files from" followed by a placeholder for the link creator's name. A red arrow points to this placeholder with the text "Link Creator's Name". Below this is a "Sort By Name" dropdown menu. A table lists the files:

Name	Modified By	Modified Date	Size
1.pdf	Indira Jurek	02/04/2025 11:08 AM	10' 23 KB

At the bottom right, there is a "Download" button.