What your client sees in the Sharing Centre

Last updated 16 November 2026

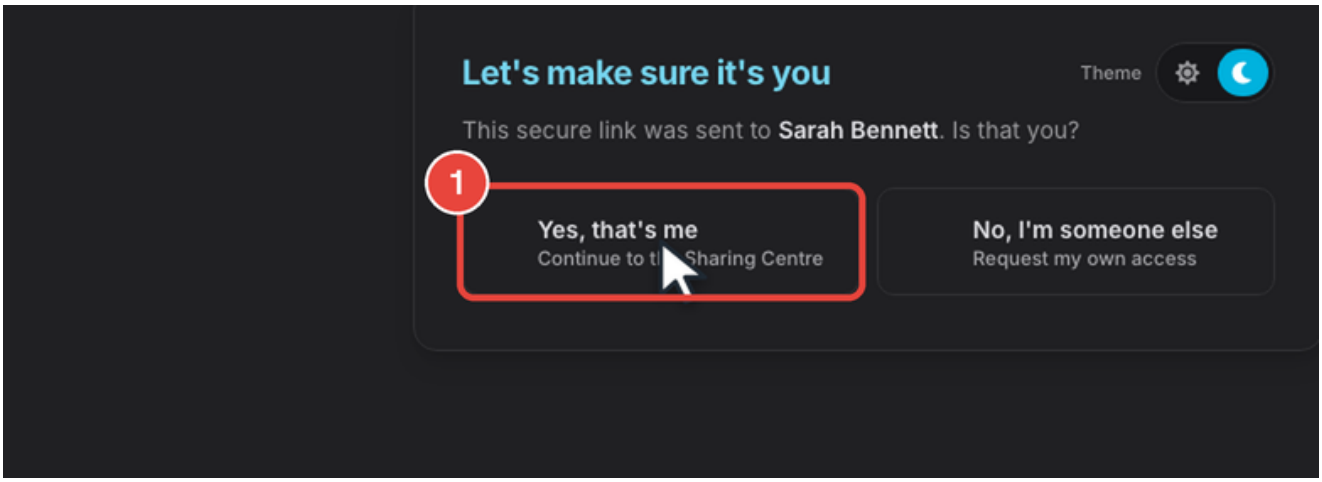
This article walks through the Sharing Centre from your client's side: opening their link, their home page, answering a page, replying to requests and swapping files. Use it to know what to expect, or send it to a client who wants to know how it works.

Related articles:

- Sharing pages with your client
- Identity verification and access requests
- Requests
- Document Vault

1. Opening the link

Your client gets a link by email, or from you directly. There's no login or password to remember.



1. They open the link. The page asks **Let's make sure it's you**, and shows who the link was sent to.
2. They click **Yes, that's me** and go straight into their Sharing Centre.

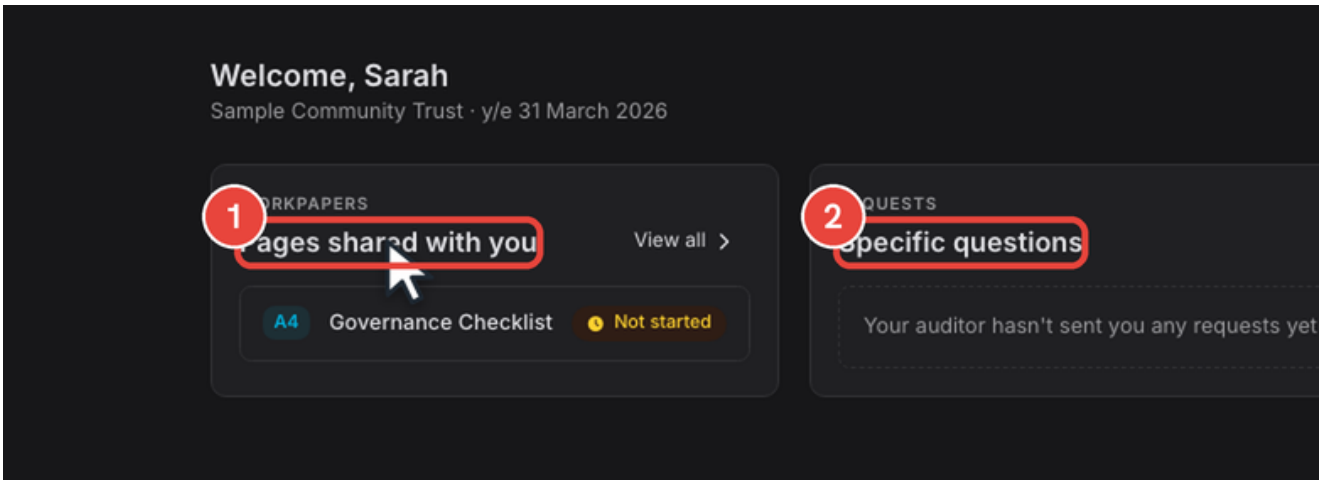
If the link reached someone else, that person clicks **No, I'm someone else** and asks for their own access instead (see section 7).

If your firm has identity verification turned on, your client may also be asked for a one time code. See Identity verification and access requests.

> **Testing a link yourself?** If you open a client's link while you're logged in to Audit Assistant, you land in a read only preview. Use a separate browser to see what your client sees.

2. The home page

Everything your client has from you is in one place.



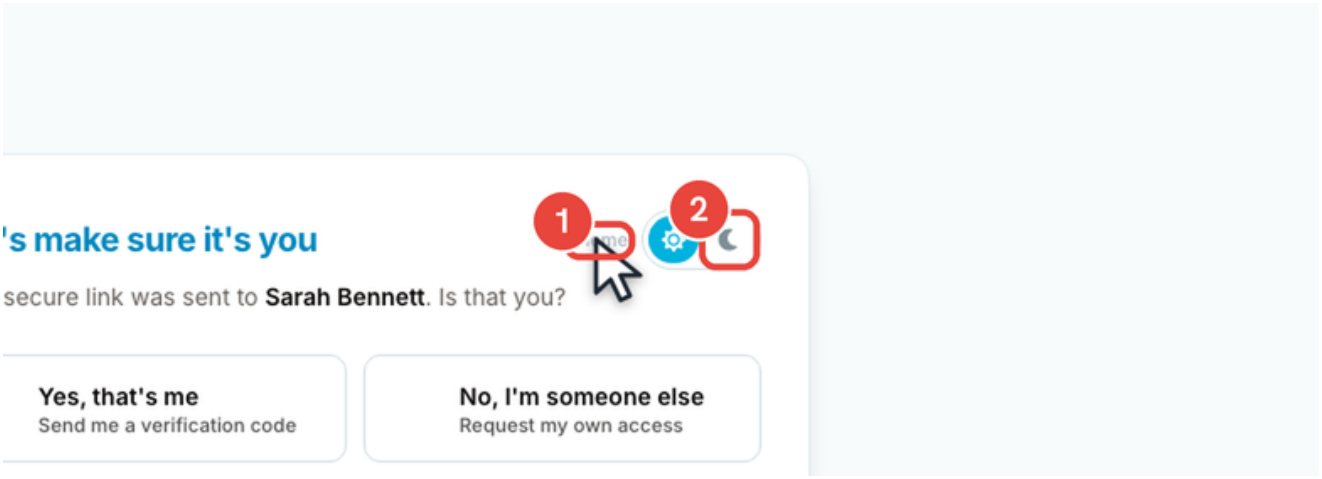
Card	What it shows
Pages shared with you	Each page you've shared, with a status: **Not started**, **In progress**, **Submitted** or **Completed**. **View all** lists them all.
Specific questions	The requests you've sent them, with a status for each.
Shared files: Recently uploaded (or **Recent files**)	Their newest shared files, if your firm uses the Document Vault. Files you shared in the last 7 days show **New**.

The menu on the left has **Home**, then under **Shared with you**, **Requests** (once they have a request) and **Shared files** (if your firm uses the Document Vault), and then their shared pages.

A page you share while your client is already in the Sharing Centre appears after they refresh.

3. Light, dark or high contrast

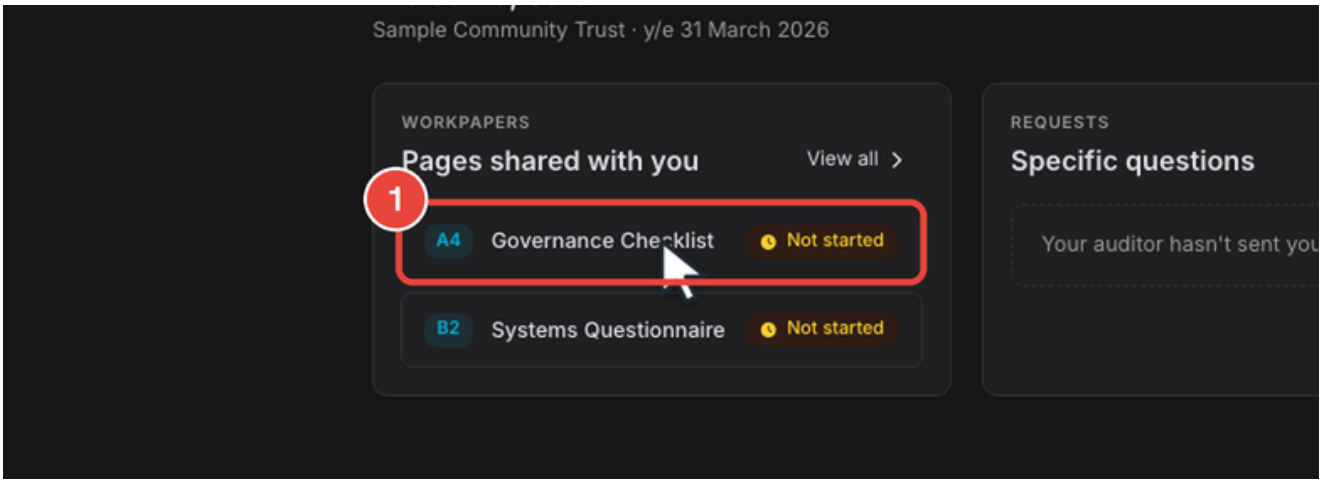
Your client can choose how the Sharing Centre looks.



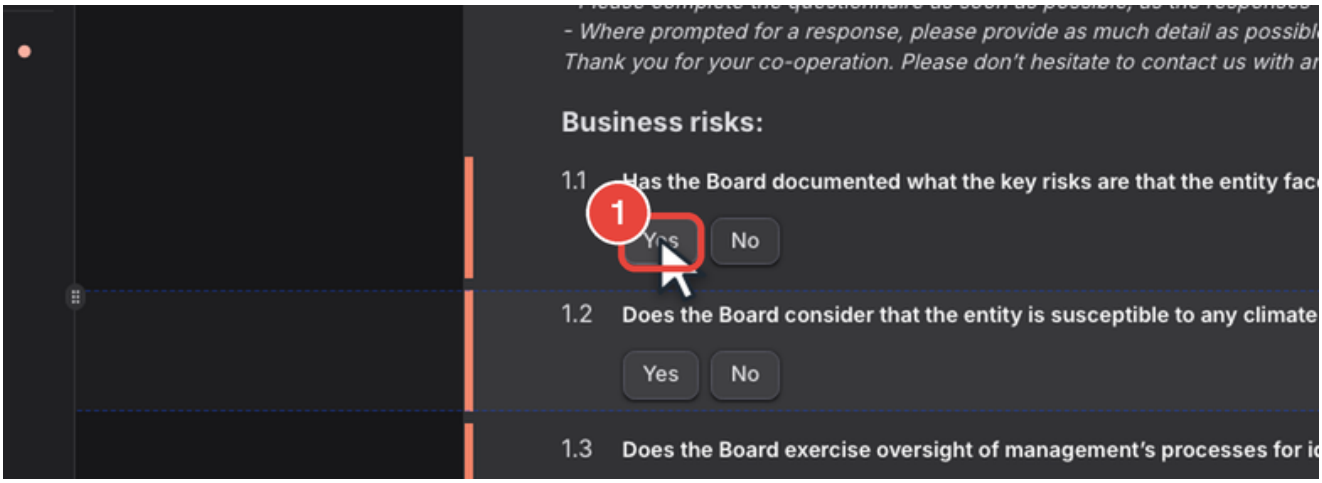
- On the confirmation and code pages, they use the **Theme** switch (sun or moon).
- Inside the Sharing Centre, they open the menu on their initials and choose **Light**, **Dark** or **High Contrast**. The same menu shows their name and email, and has **Logout**.

4. Answering a page

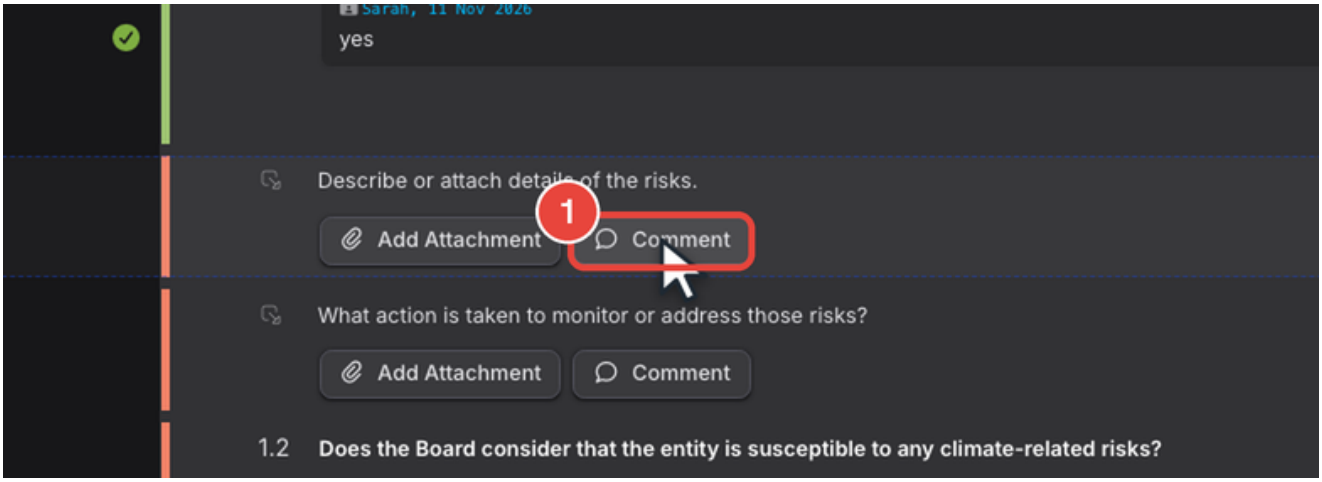
Your client only sees the sections you chose to share. With **View & edit** permission they can answer the page. With **View only**, they can read it but not change it.



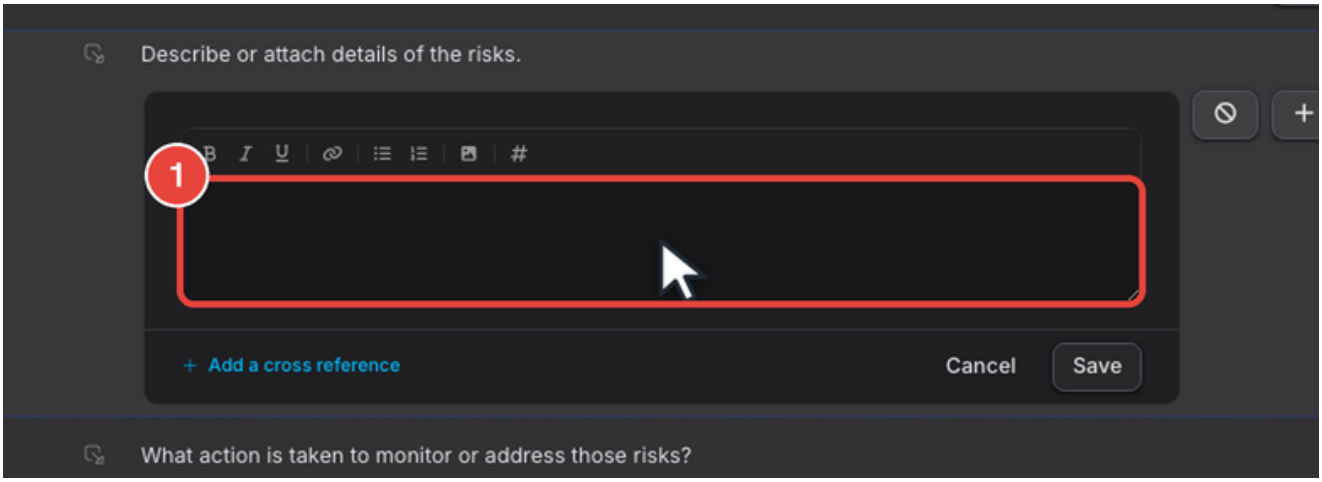
1. They open the page from **Pages shared with you**, or from the menu.



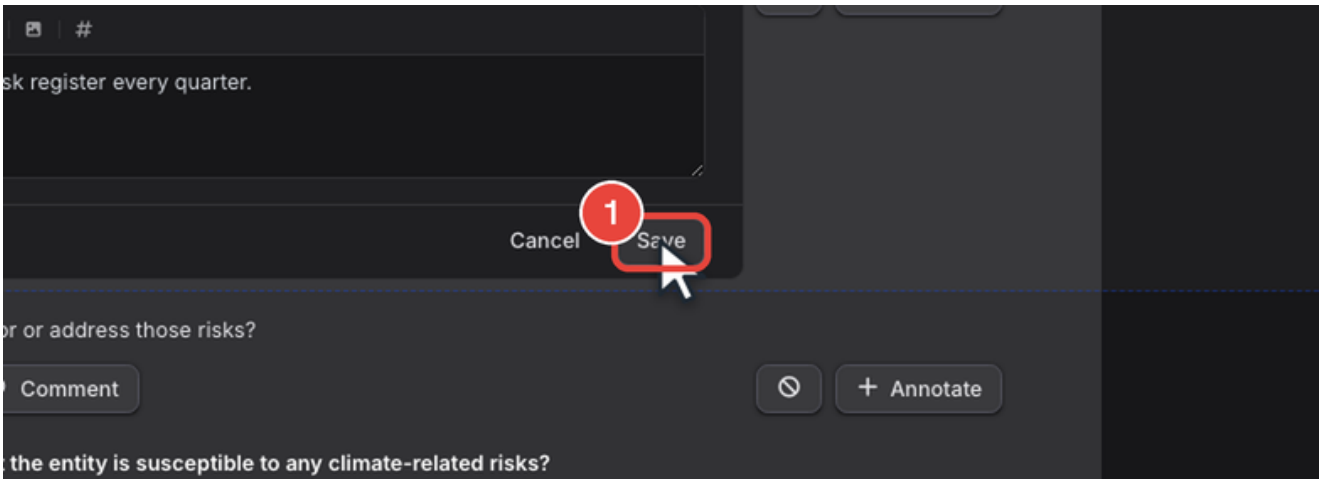
2. They click an answer, for example **Yes**. It saves by itself, and they see **Progress saved**.



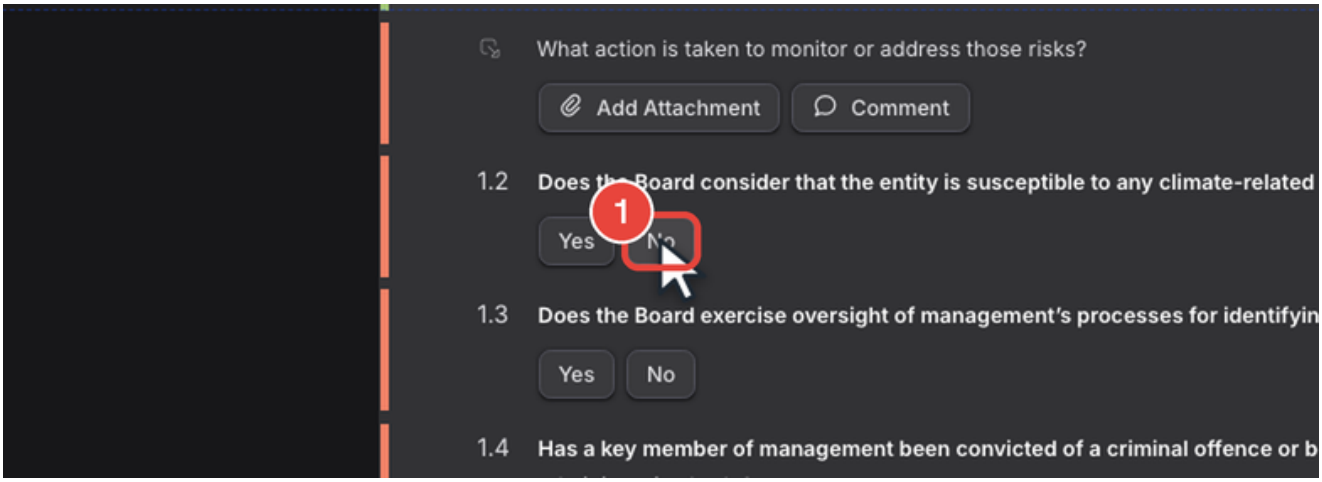
3. To explain an answer, they click **Comment**.



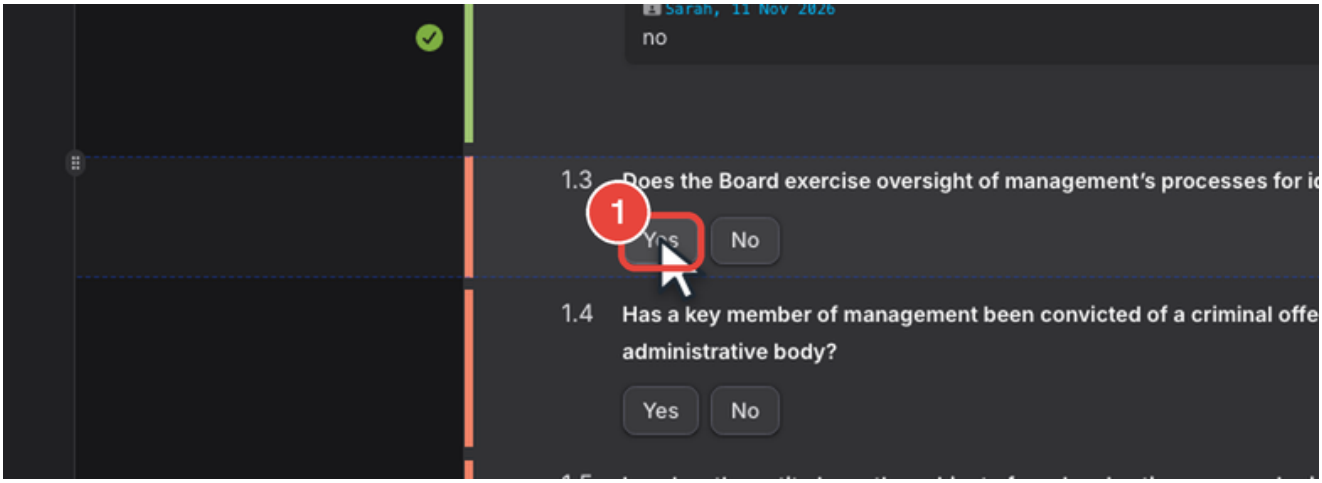
4. They type what they need to.



5. They click **Save**.

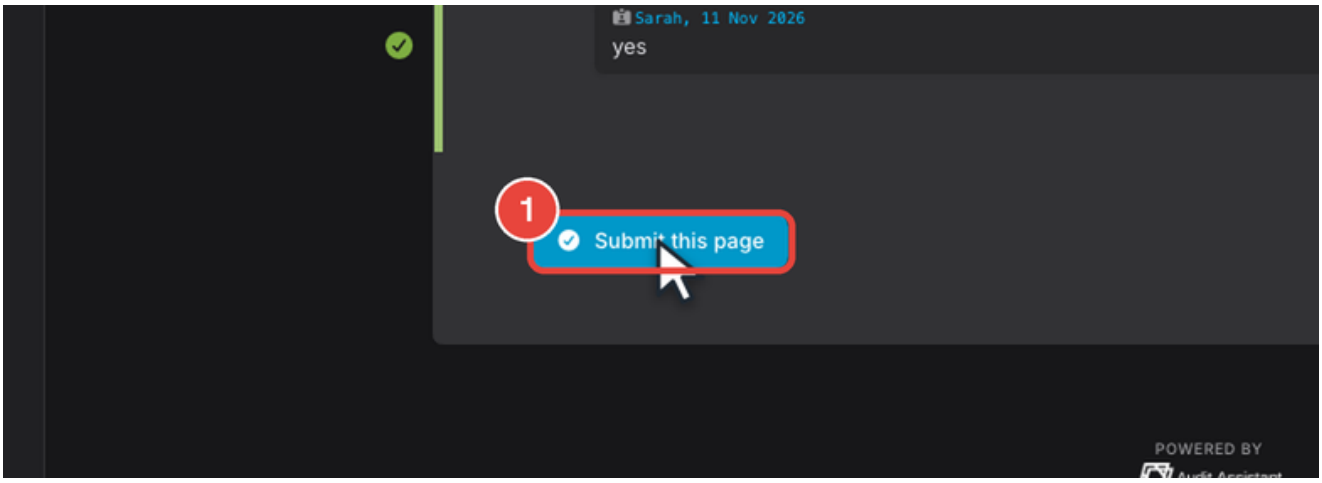


6. They answer the rest of the page in the same way. They can also add files to their answers.

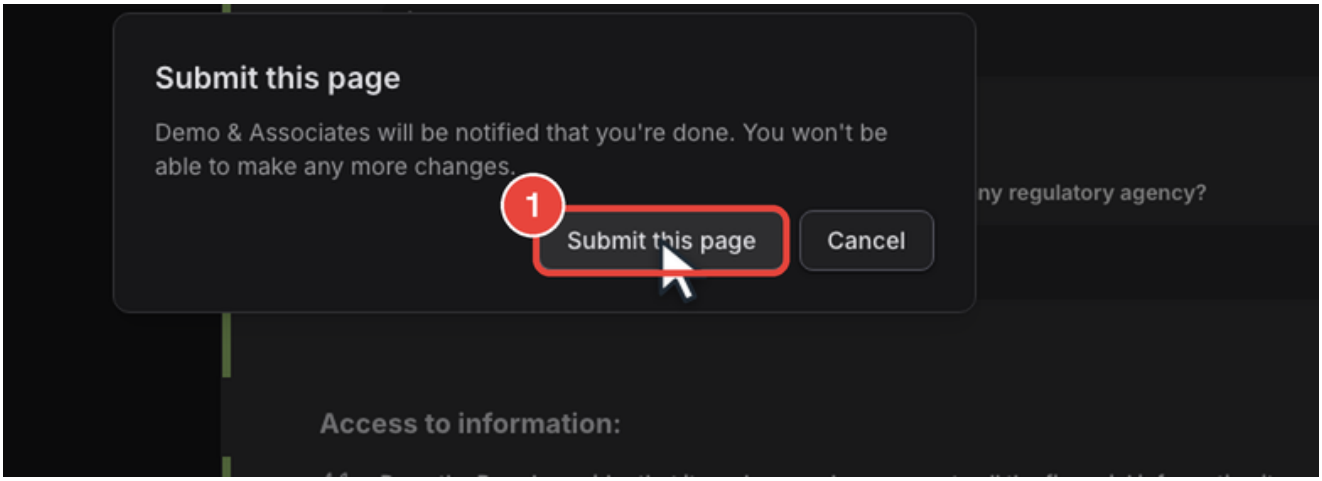


Your client can change or remove their own answers until they submit. They can't change anything your team has added.

5. Submitting a page



1. When they've finished, they click **Submit this page** at the bottom.

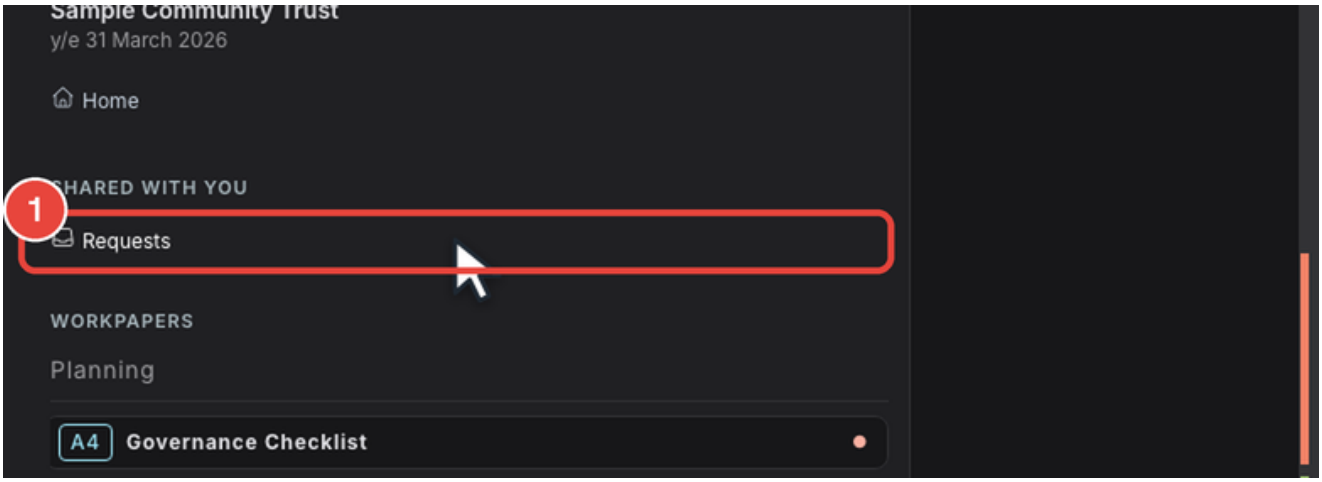


2. A box explains that your firm will be told they're done and that they can't make any more changes. They click **Submit this page** again.

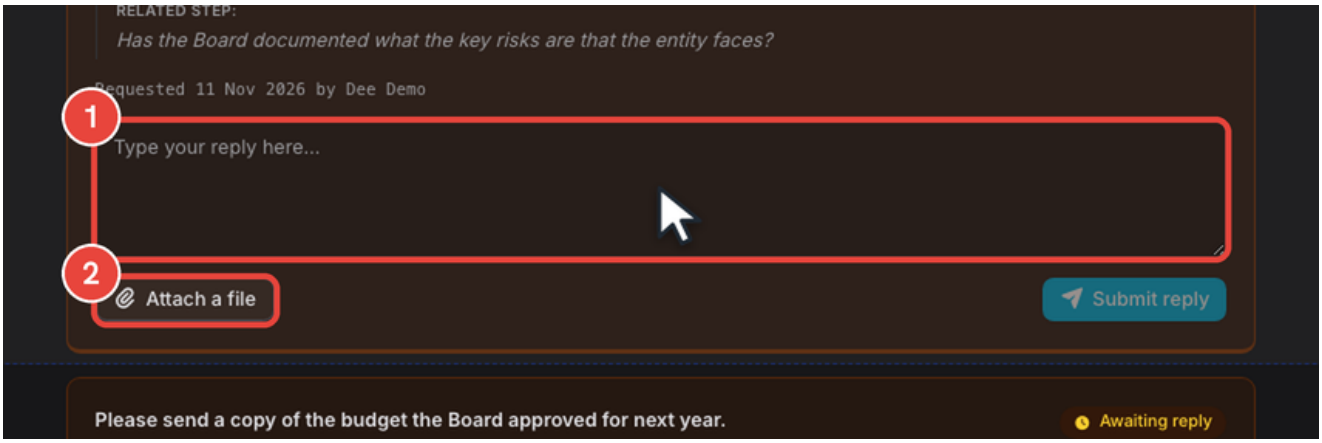
The button then shows **Submitted**. Your client can still read their answers, but they can't change them unless you reopen the page. Once you mark the page as complete, it stays in their list with a **Page completed** notice.

6. Replying to requests

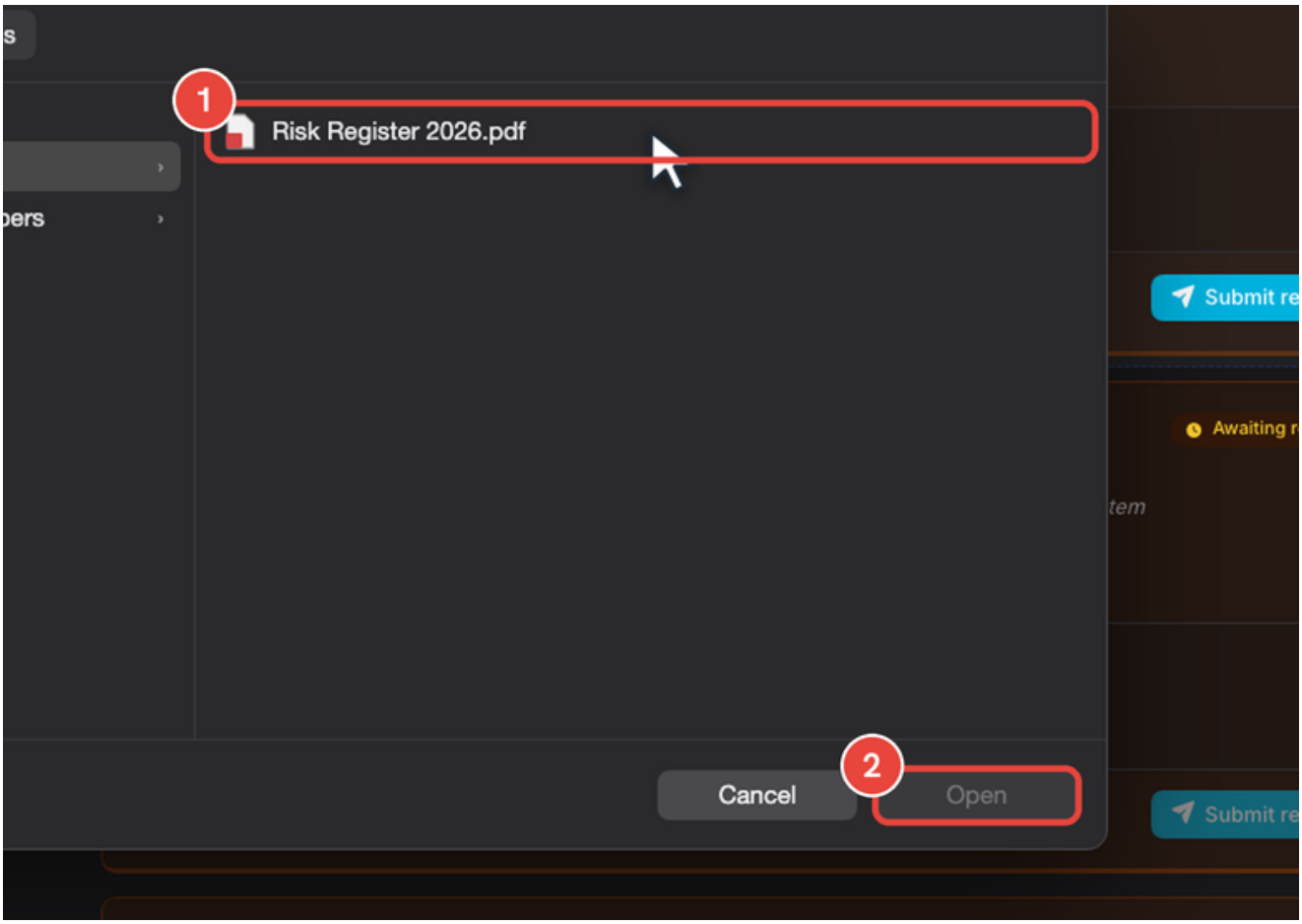
Requests are specific questions or things you've asked for. Your client can reply to them whatever permission their page shares have.



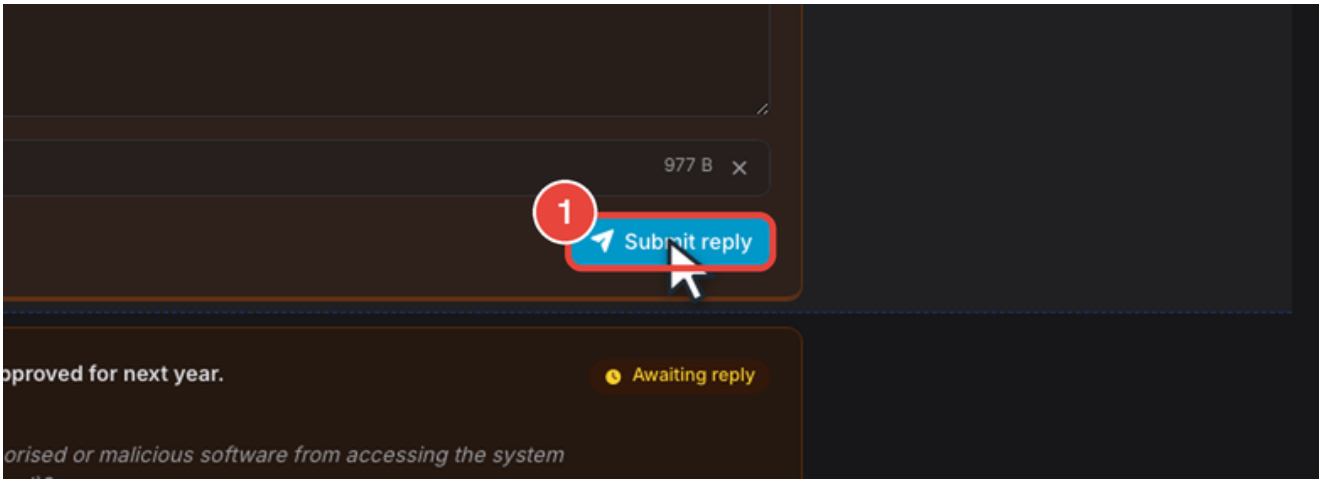
1. They click **Requests** in the menu. It shows how many are **Awaiting your reply**, **Awaiting review** and **Accepted**. Each request shows when it was asked, who asked it and, if you included it, the step it relates to.



2. They type a reply in the reply box, and click **Attach a file** to add files. They can attach more than one, up to 100 MB each.



3. They pick the file and click **Open**.



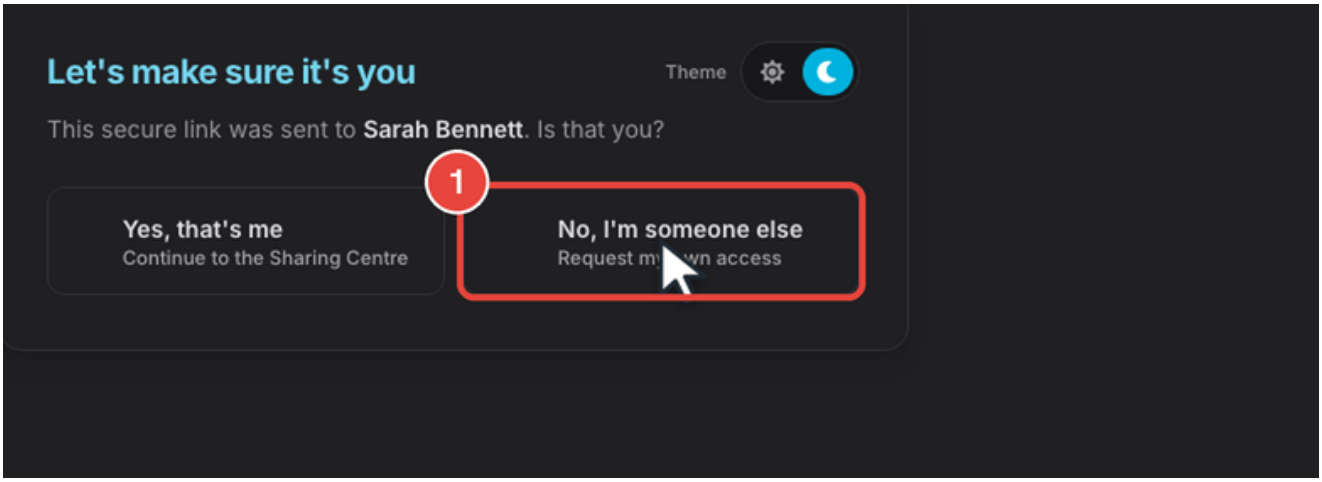
4. They click **Submit reply**.

The request then shows as answered and waiting on you. Your client can still edit their reply, or remove a file they attached, until you accept it. If you ask for more, they see it straight away as a **Further Enquiry** and can reply again. Once you resolve it, it shows as accepted and locked. See

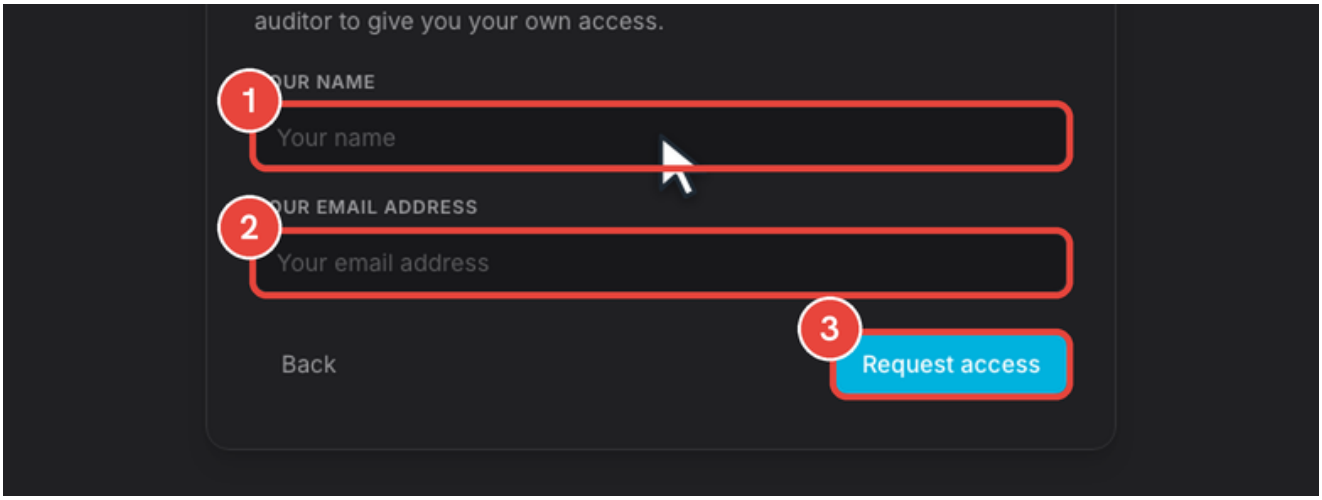
Requests for the whole flow.

7. When someone else opens the link

Links sometimes get passed on, for example to a colleague in the same office. That person can ask for their own access.

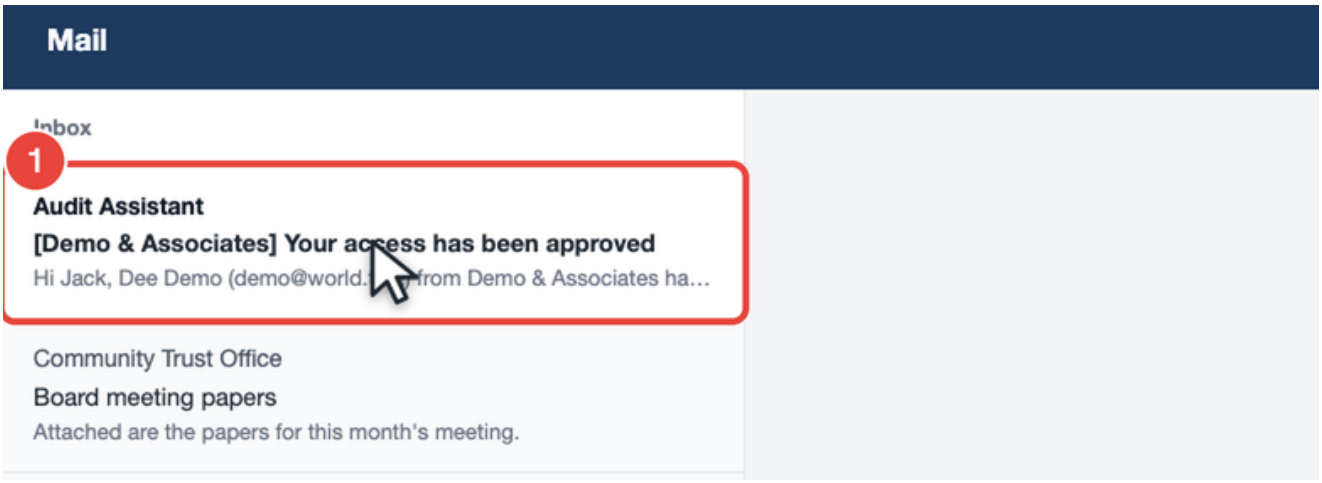


1. They click **No, I'm someone else**.



2. They enter their name and email address, and click **Request access**.

They can't get in through someone else's link. You get an access request to approve or decline. If you approve it, they get an email with their own link.



8. Files

If your firm uses the Document Vault, your client sees it as **Shared files**. They can download the files you share and, if you allow it, upload files for you. See Document Vault.

Good to know

- Your client needs no login. Their link is their way in.
- They only see the sections, annotations and files you choose to share.
- Answers save automatically.
- After submitting, they can see their answers but can't change them unless you reopen the page.
- A page you share while they're in the Sharing Centre shows after they refresh.
- **Logout** in their menu signs them out. They get back in with their link.