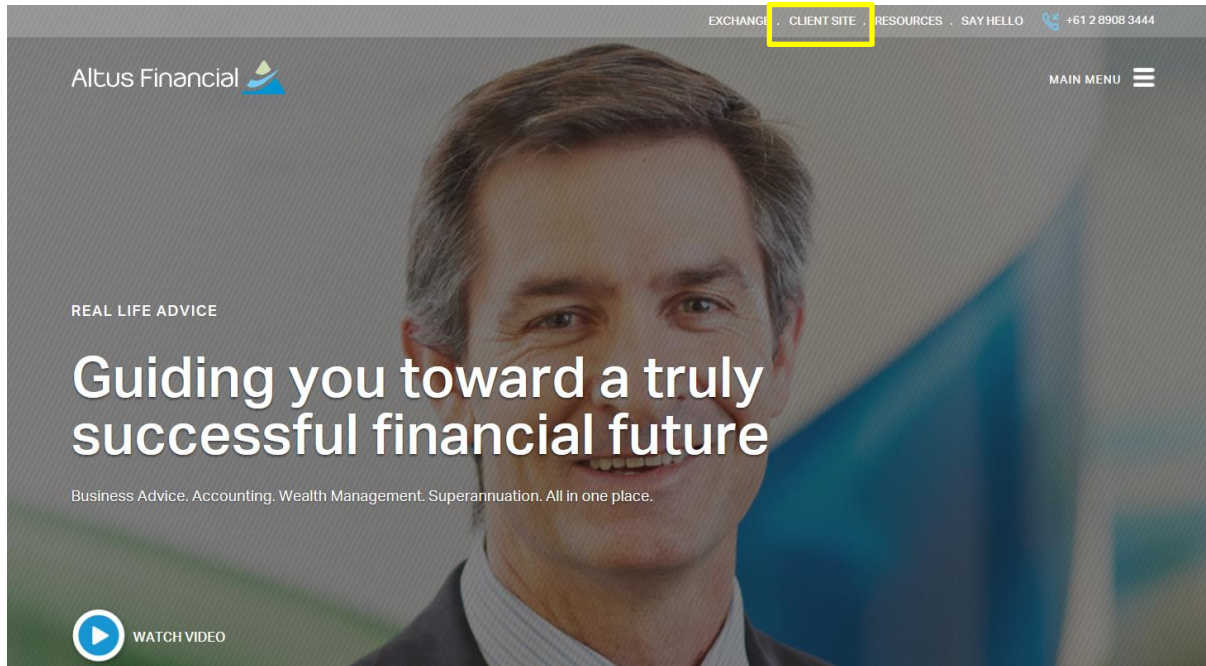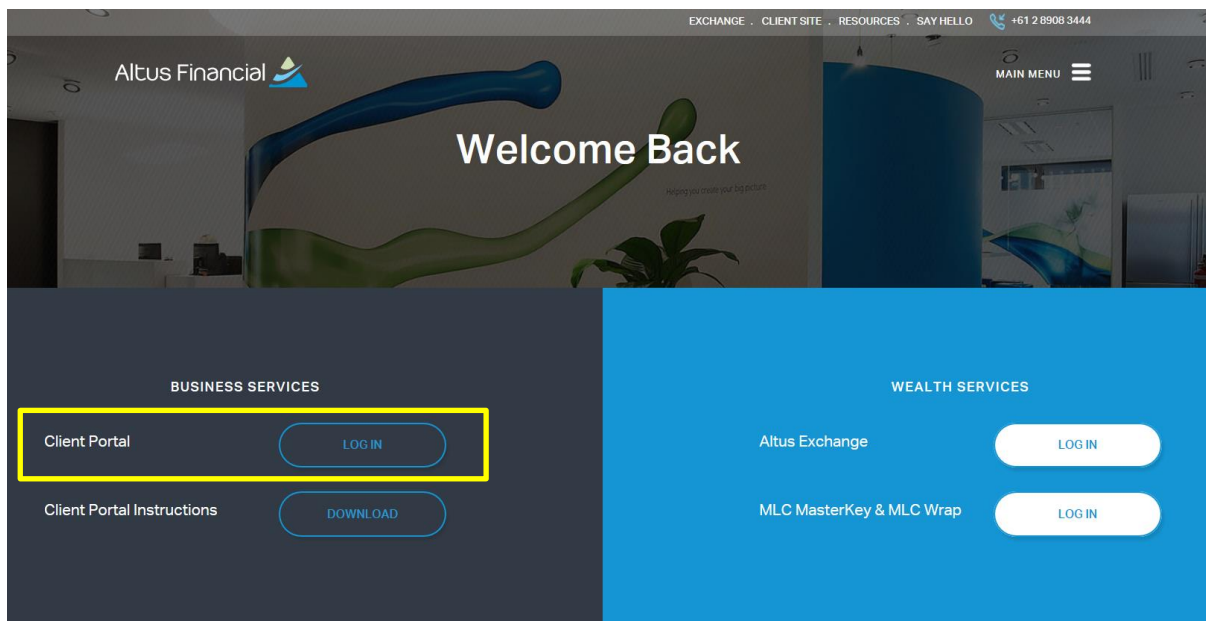# Altus Financial

How to access to the Secure Client Portal

1. Go to www.altusfinancial.com.au
2. Select the **Client Site** in the top right corner

3. Select the **Client Portal Login** button

4. It will take you to the page below

Secure Area

Please enter your username and password below to login to the Secure Area of our website.

Username: _____
Password: _____
forgot your password?

LOGIN

Secure Client Login

This is where our clients can login to their own personalised secure area to access documents, files, accounting data and financial reports. For clients using our BankLink service you'll have access to Acclipse CodeIT which allows you to view, code and add comments to your bank transactions. Clients can also choose to use their secure area to send us files and documents in a safe and secure environment.

To view a demonstration of our secure client area please use:

Username: demoarea
Password: demoarea

If you are a client of Altus and would like to register for a secure area, please **click here**.

5. Proceed to login as you normally would ie. Username & Password.
6. This is the main Home Screen of the Secure Client Login after you have entered your Username and Password. From here you can choose which section of the secure area you would like to access

Altus Financial

Secure Home   Documents   BankLink   Upload Files   User Details

Update Client Details   Logout

Welcome - Michelle test

Welcome to your personalised, **secure area** of our web site.

We've developed this secure area to provide you with a central area where you can access reports and documents for you to view, download or print.

Documents
Storage area for your confidential documents for viewing or downloading. You will automatically be notified by email when we upload documents to this area.
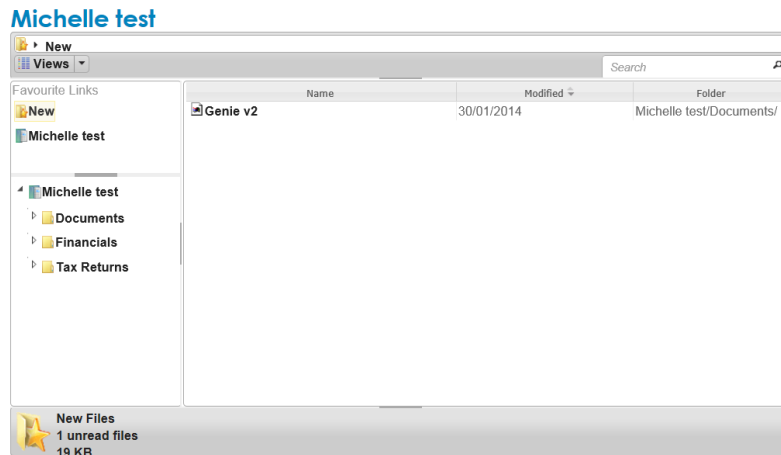
BankLink
Where we can send you BankLink transactions for you to review, code, add notes and return to us.

Upload Files
If you need to return files to us securely, you can use the 'Upload Files' area, which will allow you to send us documents or other files.

7. **Documents Tab** - Here you can see the documents that have been sent to you from your Altus Adviser.

8. **BankLink Tab** - Here you are able to view your bank link statements

My BankLink

This option is for our BankLink users only.

There are currently no transaction files available for your review in this SecureArea

9. **Upload Tab -** This is the main area where you will upload documents to our accountants.

To send a document, click 'select' next to the blank box and search for the document/s on your computer. You can choose an area for the accountants to view the documents in the "Send to Folder" option. You will see all of the folders you have available, select the relevant one and click Send Files

If you want to add additional fields to upload extra files, click the "Add" button

Altus Financial

Secure Home   Documents   BankLink   **Upload Files**   User Detail
Update Client Details   Logout

Upload Files

This is where you can send files to us (from any confidential documents to the data export from your accounting software). This is much safer way to send us your large and confidential files compared to email.

To send a file, simply click on the "Browse" button to locate the document or file on your computer, then choose the folder you would like the file saved into. Once you click on the "Send File" button, the file will be uploaded to your sec area and we will automatically receive an email letting us know it's there.

[_____] [Select] **✕**Remove
[_____] [Select] **✕**Remove
[_____] [Select] **✕**Remove
[Add]

Send to folder:
[Michelle test/Documents ▾] [SEND FILES]

Note: The largest allowed combined file size for upload is 200MB.