PRICE Accounting

PRICE Financial Intelligence

Welcome to our Client Portal

We want to invite you to login to our new Client Portal and save you some money. The client portal is a modern and fresh approach to personal security and privacy. Our older Secure File Transfer facility is no longer operational. The client portal is a dedicated login that can be used by each client. It is highly recommended and your gateway to our lowest pricing when a checklist is also completed and sent to us.

You can send us files and we can send you files. Once it is established always send file attachments using the portal, and of course we welcome ordinary email (without your confidential information attached!).

We can send a file and ask you to sign it and you can sign it digitally. Literally click to sign. No printer, no scanner needed. *We strongly recommend you action this when you receive your portal activation email.*

Access to the client portal is available now. If you would like us to create a login now send us an email to info@pricefinancial.com.au requesting access, or call us especially if we need to configure access for a couple etc. Each taxpayers MUST use a unique email address. WE can also add a portal user to their entities.

We will send an activation email. When you receive the email, click on the link and create your access. YOU will self-manage your login. And it's free.

A brief You Tube user guide video can be found here :
https://www.youtube.com/watch?v=knQ7i2pIYuY

The activation email will include:

- A link to confirm your login and create a password of YOUR choice
- A link to access the Client Portal. Save / Bookmark this link.
- You can access the portal using the BLUE login box at www.pricefinancial.com.au
- Your Client Portal user ID - this is specific to the Portal and cannot be located on any document. It is not shown on a tax return copy or invoice.

We strongly recommend you retain the activation email.

When you login to the Portal you will require three items

- *Practice ID*: If it appears prefilled as HUTA0001 this is correct.
  If blank enter HUTA0001
- *User ID*: As shown on the confirmation email. This will not change
- *Password*: That you choose. You can reset this at anytime.

You can choose for these details to be remembered on your device. Google users may find that the password can be remembered across all devices.

Please don't send test documents etc. This software is fully functional. When you send something or sign something it messages us. You don't need to tell us.

When you send documents do not send large quantities of files for us to store. We would rather receive minimal files and a quality checklist than copious files we need to open, sort and review. Multiple files can be zipped and a single zip file attached. The Portal is not a storage facility but we will retain your signed return/s and notices. We will purge some older files at times. It is important that YOU download files we send.

If you have multiple access logins under your portal access please upload to the correct entity. This avoids us refiling.

Important Information

1. Spouses cannot use a common email address. Each user MUST have a personal and unique email address. Email details to info@pricefinancial.com.au and we can setup additional spouse etc users. We will revise your details and send a further activation email to each user. You may choose to link the individual logins.

   We cannot file one persons documents into anothers portal file.

2. We do not accept any responsibility if you compromise your identity with a partner / spouse. We will refuse to lodge a tax return if it is digitally signed by a spouse.

3. Do not try to link spouses. If you have children we can provide a guide so their respective access can be managed by a parent. Contact us for a simple guide.

4. If you do not use the client portal we may incur higher costs and be unable to pass on reduced cost efficiency or may need to review fees.

Any questions or enquiries? Call 02 9875-2444 and discuss with Paul or Liz.