Welcome to our Client Portal

A better way to send and receive documents

We have recently installed a client portal to enhance our service to you. The portal is accessed from our website – www.sortedsuper.com.au - select "Client Portal" at the top of the page. Alternatively, you can access this at https://portal.hownowhq.com/

Benefits to you

- Unprecedented access to data, such as financial statements and income tax returns
- Access your relevant documents 24/7
- Better security than email
- Easily transfer files to us – no need to deliver your accounting data file or scanned documents to our office, simply upload from your location
- Ability to sign documents electronically and have the signed document automatically sent back to us (this feature expected to be available at a later date)

Accessing the Portal for the first time

You will receive an email invitation from us to access the portal, click on the link in the email and this will take you to an area to enter your password. Please note passwords must contain at least one capital letter and one number and be at least 8 characters in length.

Once you have entered your password, you will be redirected to the portal login page. Enter your email address and password to access the portal.

When we upload a file for you

- You will receive a notification via email with a link to the portal
- Click the link and enter your logon and password
- Access your documents and download as needed

By selecting a file you can choose to:

- Preview - this will open the file in the website to enable viewing.
- Download - this will download the file to your computer.

You can also upload files to us

Use the same logon and password – www.sortedsuper.com.au/client-portal . Documents can be uploaded to the portal for us to access. From the documents tab, select upload file which will open file explorer, select the file(s) you wish to upload and click open. *Hint:* If you wish to upload to a particular filter, click on the filter prior to uploading.

An uploads notification will pop-up to show progress and will automatically minimise once the files are fully uploaded.

Documents can also be uploaded by dragging and dropping them onto the portal website.

We trust you will enjoy the features and security of the portal.