

Connecting to your accounts

To help us prepare an accurate offer of finance quickly and easily, we connect to your accounts package via our secure accounts app, which is based on the same technology used by a number of high-street banks. This lets us build a full and fair picture of your business finances without the reams of paperwork required by some other lenders – and create a quote that's right for you.

- | | | | | | | | |
|----------|--|----------|---|----------|--|----------|--|
| 1 | Check
Check you have access to your accounts | 2 | Connect
Download our secure app and connect | 3 | Analysis
We analyse your finance performance and needs | 4 | Offer
Get a formal offer of finance and cashflow stats |
|----------|--|----------|---|----------|--|----------|--|

Need a hand, or ready to go?

If this is the first time you've connected accounts and have a question, call our friendly team for a walkthrough – or you can choose to get started on your own.



I'd like a walkthrough

Contact us



I'm ready to start the process

You can still call us if you have any questions.



Data Security FAQs

Read our FAQs on how and why we connect to your accounts

Video of Tony


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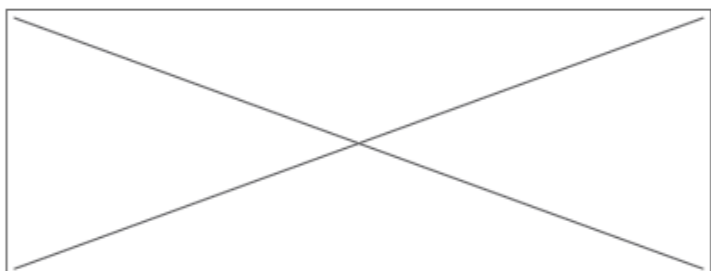
1 Which accounts package do you currently use?

2 Is your accounts software installed on your PC? Yes No



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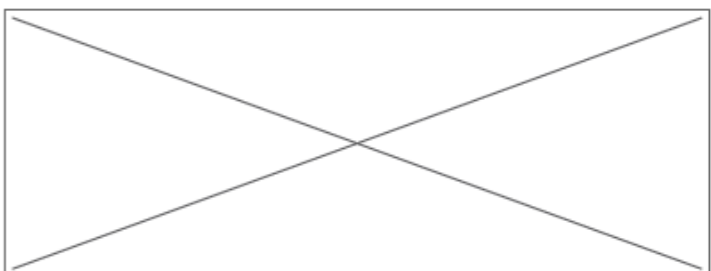
1 Which accounts package do you currently use?

2 Do you have the login details? Yes No



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The section between dotted lines are revealed

Dropdown pre-selected with the accounts pkg they chose in the previous screen (company reg)

Highlighted differences between PC and Xero accts pkgs


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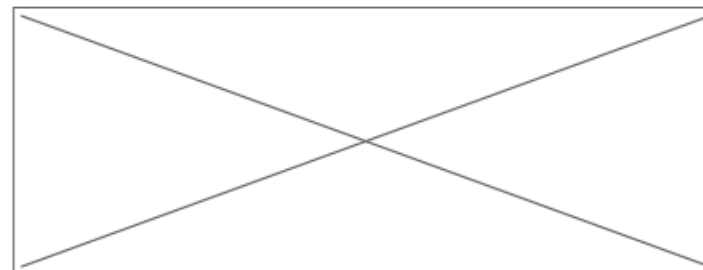
- 3 Check and confirm you're all set:
- Yes, I am running a Windows operating system
 - Yes, I have admin rights on my computer
 - Yes, I have Java version 7 or above installed
 - Yes, I have access to my accounts software directly from my PC
 - Yes, I have the login details for my accounts software (you may need the admin login details)

Can't answer 'Yes' to all of these? You may have problems running the accounts connection software – we recommend you call us before continuing.

i Once you click "Connect", you'll see some terms and conditions relating to the accounts connection, which you'll need to review and accept before the process can start. Remember, you can [contact us](#) at any time if you have questions.

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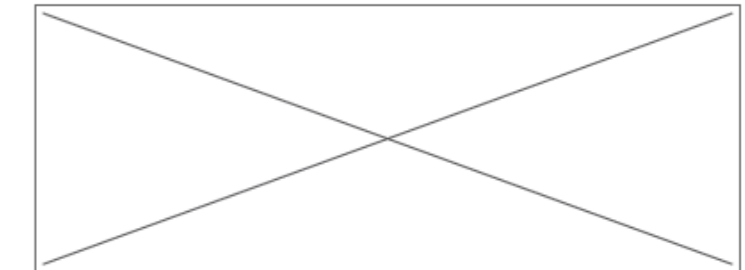
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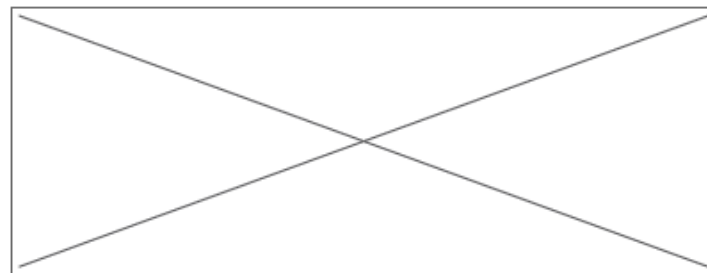
I have read and I agree to the [Terms and conditions](#)

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Placeholder text for Terms and Conditions: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim

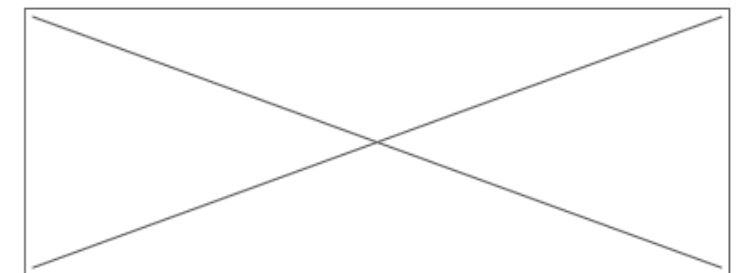
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1 Which accounts package do you currently use? Sage Line 50 (V10+) ▼

2 Is your accounts software installed on your PC? Yes No

3 Do you have access to the accounts software? Yes, but it's on another PC No, someone else does (ie, my accountant)

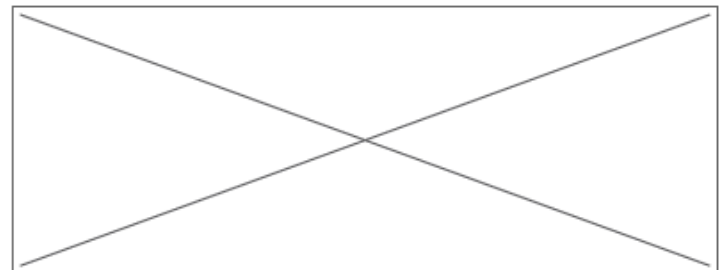
If you have access to your company accounts, please [sign out now](#) and sign back in on the computer they reside on

Revealed with the user selects NO above



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Would you like to invite this person to connect you accounts on your behalf?

Please enter the details below for the colleague (or other party) you would like to invite to complete the process of connecting your accounts.

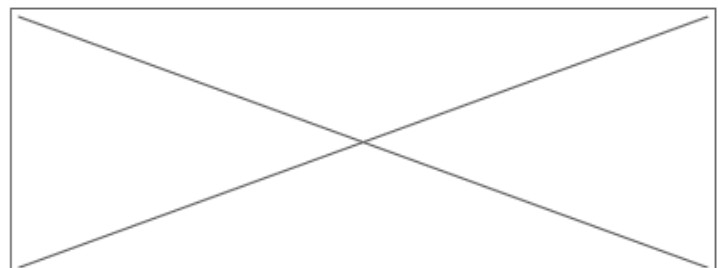
This will allow the nominated user to carry out one or more account connections over the next 30 days

 **INVITE USER**



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2 Do you have the login details? Yes No

If you can obtain the login details for your cloud-based accounts package, please do so. You can then click "yes" above and follow the instructions.


Revealed with the user selects NO above

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<input type="text" value="First name"/>	<input type="text" value="Last name"/>
<input type="text" value="Email"/>	<input type="text" value="Phone"/>

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