

Accessing the FTP Site

What is an FTP site?

FTP is an acronym for File Transfer Protocol. As the name suggests, FTP is used to transfer files between computers on a network. You can use FTP to exchange files between computer accounts, transfer files between an account and a desktop computer, or access online software archives. This is a secure way to upload and download documents between you and AssetBook.

Why should I use it?

We use this site to exchange confidential information with you including uploading daily account maintenance files, client billing files, SEC audit results, etc. Maybe you have a support request where we need to look at certain account numbers. We recommend that you do not send account numbers in an insecure email. You can upload a spreadsheet to the ftp site with those account numbers.

Can I use Internet Explorer to access the ftp site?

We call it an "FTP Site" but it is NOT a website. It is not suggested to access the FTP site through a browser. Doing so will allow you access to the information on the FTP site but can be really slow and restricts you to downloads only. Therefore, when accessing the FTP site using a browser the ability to upload and share documents with AssetBook is not available.

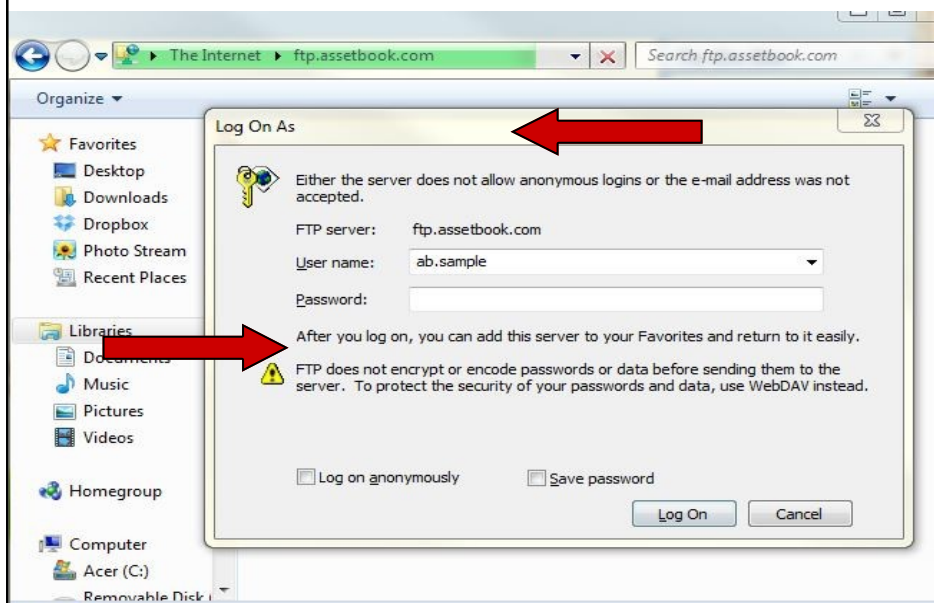
Mac User?

To access the FTP site on a Mac use the "Command + K" function. This will open the FTP site and allow you to access or download the files. However, to upload files to the FTP site via a Mac you must install software such as Filezilla or Cyberduck.

What is my username and password?

Your username and password will be assigned to you once you have access to your database. A member of our team will relay this information to you once it is available.

Login



1. Right click on your start menu to open File Explorer
2. In the address bar enter [ftp.assetbook.com](ftp://ftp.assetbook.com)
3. A window will open asking for a username and password
4. Enter your username and password into the correct fields
5. Select 'Log On'

Download

After logging in you will see all files available for download

- Drag the files you wish to download to your desktop or other location of your choice or use the copy and paste functions

Upload

- Drag the files you wish to upload from your desktop or other location to your FTP folder or use the copy and paste functions



Need further assistance?

Please contact our support team
301-387-3238 option 3
support@assetbook.com