



Choice - Portal User Guide



Welcome to the Choice portal

You should only need to read this guide the first time you access the Choice portal.

To make better decisions you need access to information about your business. The Choice portal is designed to assist you to

- Run your company
- Comply with your obligations as a director, shareholder and taxpayer
- enable you to have access to all the information you need

The Choice portal enables you to view documents uploaded by us, approve them and access them 24-7. You can also upload expenses and other documents onto this portal.

The Choice portal can be accessed seamlessly from your mobile device enabling you to access information at your fingertips.

Benefits of the portal

- Access 24-7
- Secure - backed up daily
- Simple and easy to use
- Updates and information
- Access to Invoices
- Access to Tax Provision Statements for clients of Balance
- Upload expense details



Step 1 . Login to Portal

We have sent you by email a username and hyperlink to the Choice portal.

To log in to the portal, copy and paste, or type <https://portal.mychoice.uk.com>

Then save this in your favourites.

You will see the Set Password screen as below;

Set Password

Please enter your new security details:

Password

Confirm
password

RESET

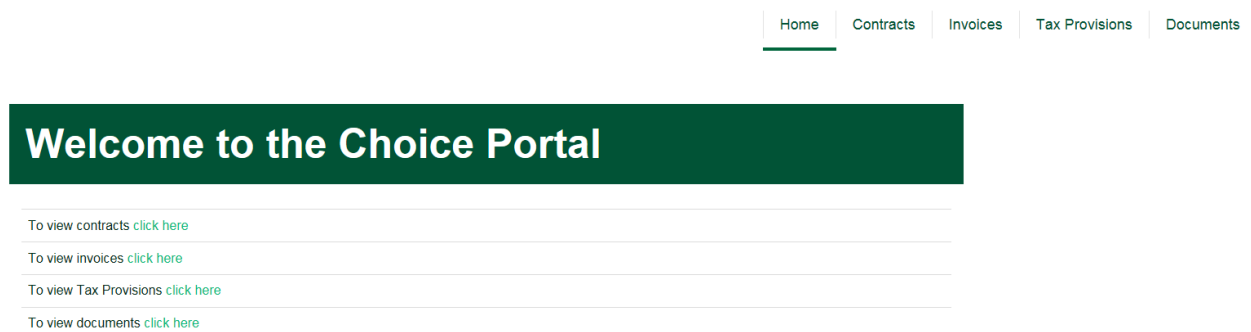
The password must be a minimum of 6 characters and include an uppercase letter, lowercase letter, number and symbol (e.g. # or !).

Type your chosen password and confirm it. Click reset to set your new password.



Step 2. Accepting Your Contract (and Balance Terms and Conditions)

Once you login, you will be taken to your home screen where you have the option to view Contracts, Invoices, Documents and Tax Provision Statements*. To view any of these, click on the “Click Here” link.



You will receive an email notification informing you that you have new documents uploaded to your portal account. You can click the specific tab or the “Click Here” link to access these.

The first time you access the portal you must accept the contract with Choice (and Balance and Terms and Conditions*).

You will not be able to use this portal and access information such as invoices or tax provision statements* until you have accepted the ‘Choice – Agreement to supply services’ (and the ‘Balance Terms and Conditions’ if applicable to you).

Please go to the view contracts screen and click download – see the screenshots below. Once you have downloaded and read the contracts please click on the boxes titled ‘Click Here To Accept Contract’.

*if you are an accounting client of Balance



Click to accept the contracts, as shown on the screenshot below.

Contracts

This page shows your current contract(s). Please download and review each of your contracts. Once a contract has been downloaded you will see a "Click here to accept contract" button. You must accept all of your existing contract documents to continue using the portal.

FileName	Description	Accepted	Accepted Date
Choice - agreement to supply services.pdf	Choice - agreement to supply services	CLICK HERE TO ACCEPT CONTRACT	Download
Balance Terms & Conditions.pdf	Balance Terms & Conditions	CLICK HERE TO ACCEPT CONTRACT	Download

Your screen will update to reflect these changes as below.

Contracts

FileName	Description	Accepted	Accepted Date
Balance Terms & Conditions.pdf	Balance Terms & Conditions	<input checked="" type="checkbox"/>	08/02/2018 16:24:31 Download
Choice - agreement to supply services.pdf	Choice - agreement to supply services	<input checked="" type="checkbox"/>	08/02/2018 16:24:29 Download

Step 3. Viewing your Invoice and Tax Provision Statement

Once Choice has processed a payment you will have access to those Invoices and Tax Provision Statements. You will receive a notification each time you are paid. To view these log in as normal and click on the Invoices or Tax Provision Statement Tabs.

Invoices

Week	Payment Date	
50	15/03/2017	Download
25	22/09/2016	Download
24	15/09/2016	Download

From here you can download and view the Invoice or Tax Provision Statement.

Tax Provisions

Week	Payment Date	
50	15/03/2017	Download
25	22/09/2016	Download
24	15/09/2016	Download

Remember that to receive the Tax Provision Statements you need to be a client of Balance.

Step 5. Uploading Documents and Expenses

There will be documents which you will want or need to send to us. All you need to do is to upload the document. A notification will be sent to us and we will take care of the rest.

To upload a new document go to the 'My Documents' Tab. From here you can click 'Upload new document'

My Documents

+ Upload new document

No documents available.

Now select your document and add this file. Then proceed to upload by clicking 'Upload'.

Description	<input type="text" value="Expenses 27/04/2016"/>	<input type="button" value="ADD FILES..."/>
Expenses 27.04.2016.pdf	212.60 KB	<input type="button" value="UPLOAD"/> <input type="button" value="CANCEL"/>

[View Uploaded Documents](#)

Notes:

The maximum file size for uploads is 4 MB.

Only the following file types (.csv, .jpg, .pdf, .txt) are allowed.

You can then click 'View Uploaded Documents' to view successful uploads.

Description	<input type="text" value="Expenses 27/04/2016"/>	<input type="button" value="ADD FILES..."/>
Expenses 27.04.2016.pdf		212.60 KB
<input type="button" value="View Uploaded Documents"/>		
<p>Notes: The maximum file size for uploads is 4 MB. Only the following file types (.csv, .jpg, .pdf, .txt) are allowed.</p>		

You should also upload your expenses here. You can do this simply by using your phone to take a picture of a completed expense claim form and uploading to your portal document page.

If you need to send a receipt you can take and upload a picture in the same way.

When uploading expenses please use the format 'Expenses DD.MM.YY' for example Expenses 27.04.16 as shown in the picture above.

If you cannot upload expenses in this way please continue to email or post these into us.

And lastly, remember,

To log in to the portal, type <https://portal.mychoice.uk.com>

Then save this in your favourites for quick and easy access.

If you've forgotten your password or need to change your password, click the forgotten password link on the log in page and follow the instructions from there.