



Anytime - Portal User Guide

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Registered in England and Wales; 5th Floor Hampton by Hilton 42-50 Kimpton Road Luton Bedfordshire UK LU2 0FP Company No. 10050418
A list of directors is displayed at the above address





Welcome to the Anytime portal

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

To make better decisions you need access to information about your business. The Anytime 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 Anytime portal enables you to view documents uploaded by us, approve them and access them 24-7. You can also upload documents onto this portal for our attention.

The Anytime 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 FreeAgent



Step 1 . Login to Portal

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

To log in to the portal, copy and paste, or type <https://portal.anytime.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 must be a minimum of 6 characters and include an uppercase letter, lowercase letter, number and symbol (e.g. # or !).

Password

Confirm
password

RESET

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



Step 2. Approving uploaded documents

Once you login, you will be taken to your home screen where you have the option to view and upload Documents. There will be certain documents that we will send you from time to time which will require your approval, such as Terms & Conditions and Tax Returns.

Unread documents will show as bold and next to the Documents tab there will be a number in brackets notifying you of the amount of unread documents on your portal. We will also send you an auto-email notifying you each time documents are uploaded to your portal account.

In order to approve documents you need to access them by following these steps.

On your home screen you can click on the “Click Here” link or click the Documents tab in the top right corner, as outlined in the below screenshot.



WELCOME TO THE ANYTIME PORTAL

To view documents [click here](#)

This will take you to your Documents page where you will have an overview of uploaded documents.

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MY DOCUMENTS

[+ Upload new document](#)

Search Document

SEARCH

Created	Updated	Title	Filename	Uploaded By	Approved Date	
24/03/2017 12:05:34		SAML1234- VAT Return 30062016	SAML1234- VAT Return 30062016.pdf	Admin	<div>CLICK HERE TO APPROVE</div>	Download

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From here you can see the documents that need to be approved (and any other documents sent for information). In order to read and approve a document you will need to click download to open and read the document and then click on the “Click here to approve” button.

MY DOCUMENTS

[+ Upload new document](#)

Search Document		SEARCH				
Created	Updated	Title	Filename	Uploaded By	Approved Date	
24/03/2017 12:05:34		SAML1234- VAT Return 30062016	SAML1234- VAT Return 30062016.pdf	Admin	CLICK HERE TO APPROVE	Download

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1



Once downloaded and approved this will be confirmed by showing the approval date.



MY DOCUMENTS

+ Upload new document

Search Document		SEARCH				
Created	Updated	Title	Filename	Uploaded By	Approved Date	
24/03/2017 12:05:34	24/03/2017 12:15:34	SAML1234-VAT Return 30062016	SAML1234-VAT Return 30062016.pdf	Admin	24/03/2017 12:15:34	Download

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Step 3. Uploading Documents

There will be documents which you will want or need to send to us from time to time. All you need to do is 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 'Documents' Tab. From here you can click 'Upload new document'



MY DOCUMENTS

[+ Upload new document](#)[SEARCH](#)

Created	Updated	Title	Filename	Uploaded By	Approved Date	
24/03/2017 12:05:34	24/03/2017 12:15:34	SAML1234-VAT Return 30062016	SAML1234-VAT Return 30062016.pdf	Admin	24/03/2017 12:15:34	Download

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[1](#)

You can now click add file to open a browser tab to select the file you would like to upload.

Please bear in mind only the following document types will be supported; .csv , .jpg , .pdf and .txt and there is a 4 MB limit per document.



Title

ADD FILES...

[View Uploaded Documents](#)

Notes:

The maximum file size for uploads is 4 MB.

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

Now select your document and add this file. You should give the uploaded document a title which should be a description of what the document is, in addition to the file name. You can then proceed to upload by clicking 'Upload'

Title

Expenses 27.04.2017

ADD FILES...

Expenses 27.04.2016.pdf

515.91 KB

UPLOAD

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.

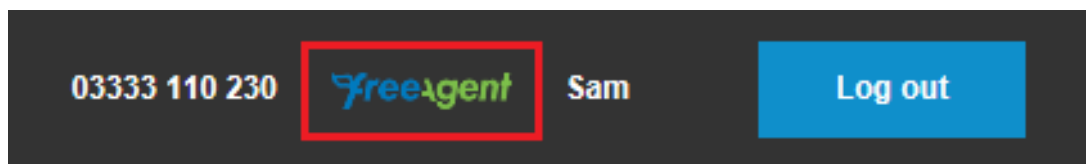
Step 4 . Accessing FreeAgent

If we have set up a new FreeAgent account for your company you will have received an email with first log in details directly from FreeAgent. You will need to access this to confirm and set your FreeAgent password. You can now log



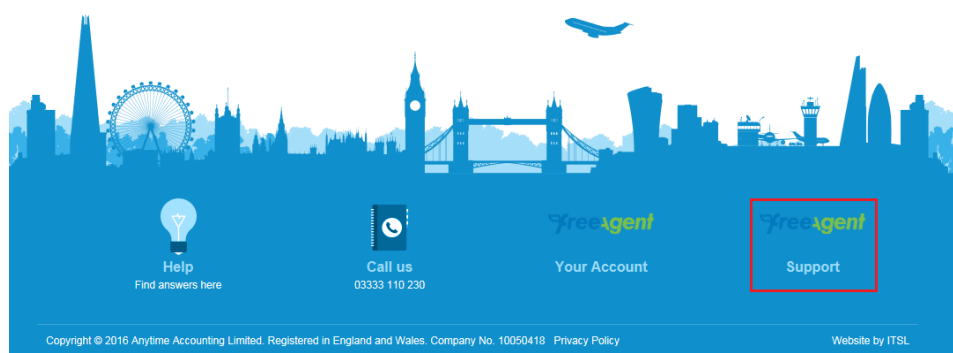
into FreeAgent by clicking on the logo at the top of the portal home page or at the bottom.

Where you had an existing FreeAgent account and have supplied the unique FreeAgent URL to us you can now log into FreeAgent by clicking on the logo. (If you have NOT yet supplied the FreeAgent URL, please confirm this as soon as possible so that we can link this to the portal for you AND so that we can access and review your data going forward.)



If you use Google ID you can save your password and in future will be able to click straight through from the portal without re-entering your login details to FreeAgent.

There is also a link that takes you directly to the FreeAgent support page for any queries you may have regarding the FreeAgent Software.



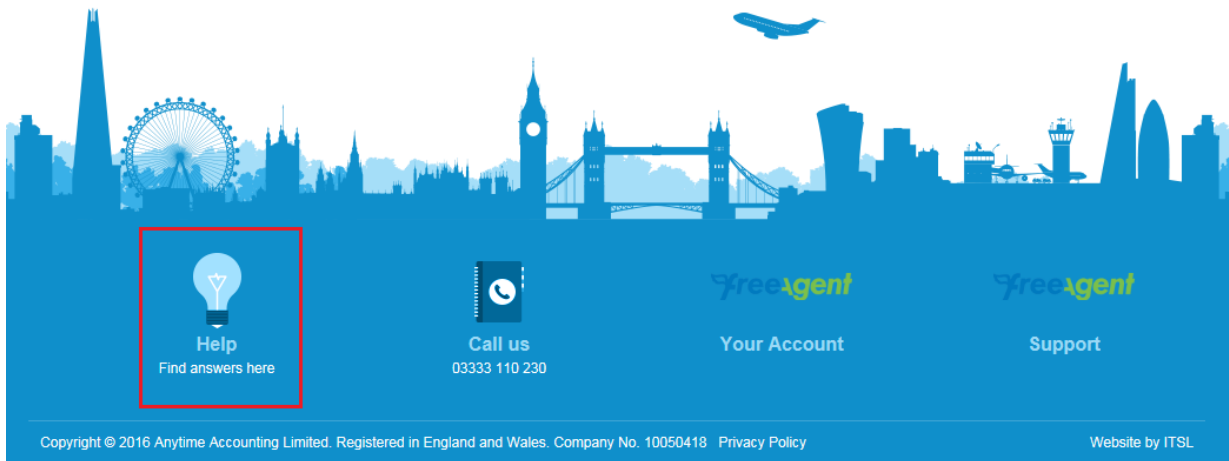
Step 5 . Accessing Helpful Documents

There are some useful documents you can access via the portal that will offer you some help and guidance while running your own Limited Company through Anytime. To access these documents all you need to do is click on the Help link in the top right hand corner or the bottom of the homepage.



WELCOME TO THE ANYTIME PORTAL

To view documents [click here](#)



From here you can download these documents and guides to keep and refer to. The Help section will be constantly updated with new material by Anytime as and when it becomes available.

And lastly, remember,

To log in to the portal, type <https://portal.anytime.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.