User manual portal

Oudshoorn & Schoe
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1.Index

This manual shown by means of screenshots of the possibilities of the portal.

<u>Step by step</u> it is explained what the various buttons and screens mean.

The following components are covered:

- Inloggen = Login

- Welkomscherm = Welcome Screen.
  (This is a dashboard showing all parts of the portal).

- Accordering = Approval
  (This explains how documents should be approved).

- Ondertekening = Signature
  (This explains how documents should be signed).

- Dossier = File
  (Here is shown how everything is organized and how you can upload data to the accountant).

The layout of the portal has changed; In this manual reference is made to green buttons, bars and text. In the current portal, these have been changed to blue.

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2. login to the Portal

MijnAccountantsPortal (MAP) can be started from the website: (https://oudshoornschoe.nl/).

On the homepage of www.oudshoornschoe.nl you will find a option with 'Inloggen Portal' = Login.

When you click on this, a new tab will be opened with the login page of the portal. On this page you can log in with username and password. The login process is explained in detail below.

Note: It is a assumed that you have already activated your account for the portal. To this end, you have received an email from the Secretariat of Oudshoorn & Schoe describing how to activate your account for the portal.

To log in, complete the following steps:

a. Start a browser and go to the website: www.oudshoornschoe.nl
b. At the top right you can choose '**Inloggen Portal**' = Login portal;

c. The next screen will appear where you can enter your username and password. Did you forget your password? Then choose the option '**Nieuwe activatiecode opvragen**' = request new activation code. You will then receive an email with which you can reactivate your account and choose a new password;

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d. When you click on login, you will see the following screen.

Controle identiteit

Als tweede stap zullen we u identiteit controleren. Hiervoor sturen we een e-mail naar het adres waarmee u bij ons bent geregistreerd. Als u regelmatig inlogt in MijnAccountantsPortal, dan raden wij u aan om een Authenticator App te installeren op uw mobiele device. Op deze manier hoeft u niet elke keer te wachten op een email, maar kunt u direct de code vanaf uw mobiele device overtypen.

☑ Een e-mailcode opvragen
U krijgt elke keer dit scherm

🔑 Authenticator app instellen
U logt voortaan in via een code uit de app

e. You click on **'Een e-mailcode code opvragen'=** request an e-mail code.
f. On the next page you enter the 6-digitsecurity code that you receive on the mail. After entering the code, you can click '**Aanmelden**' = Login to login.

ⓘ Er is een code opgestuurd naar uw e-mailadres om uw identiteit te controleren.

E-mailcode invoeren

Er is een e-mailcode gestuurd om uw identiteit te controleren. Voer deze hieronder in.
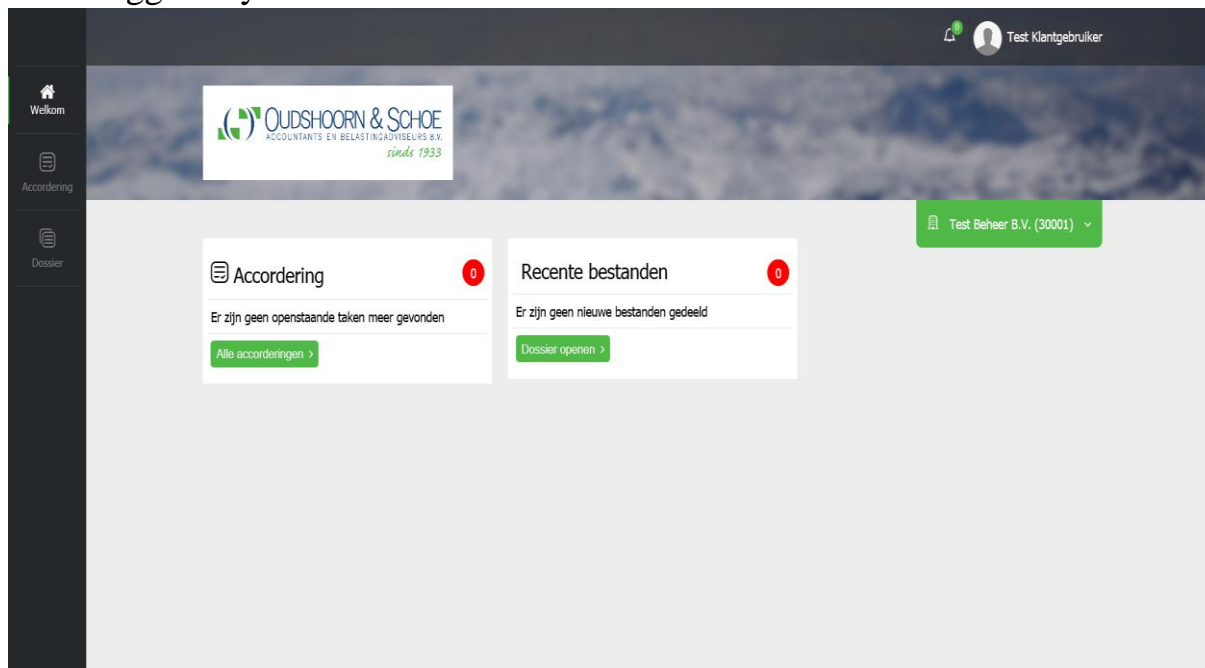
E-mailadres

jprobeermaar@hotmail.com

Beveiligingscode *

|

← Terug naar loginformulier   ➡ Aanmelden

You can also install an Authenticator app on your mobile phone that generates security codes. You can consult a manual for this on the left side of the screen above.

3. Welcome screen

After loggin in you will enter the welcome screen below.


3.1 Change of organization
If several companies are linked to your account, you can switch between the different companies within the accountants portal.
To do this, select the arrow in the green box containing the currently selected organization. You then click on the desired organization.

3.2 Open tasks
In the red circle behind Approval and Dossier. The number of documents for which an action is required by you is shown.

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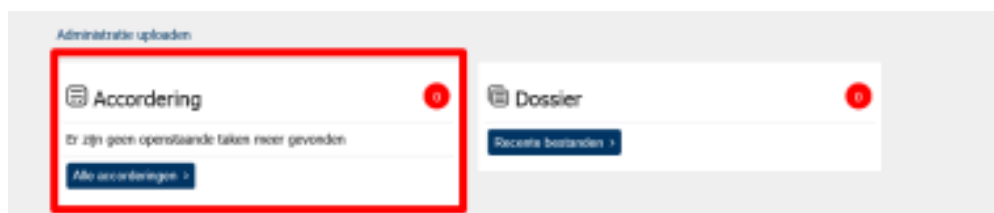
4. Approval

4.1 General

This is the place where the documents are prepared for approval such as:

- Tax returns (income tax, corporate tax, etc.).
- Chamber of Commerce Publication documents.

There are several streams that MijnAccountantsPortal supports, including corporate taks, sales taks, but also the annual accounts, publication and credit reports.
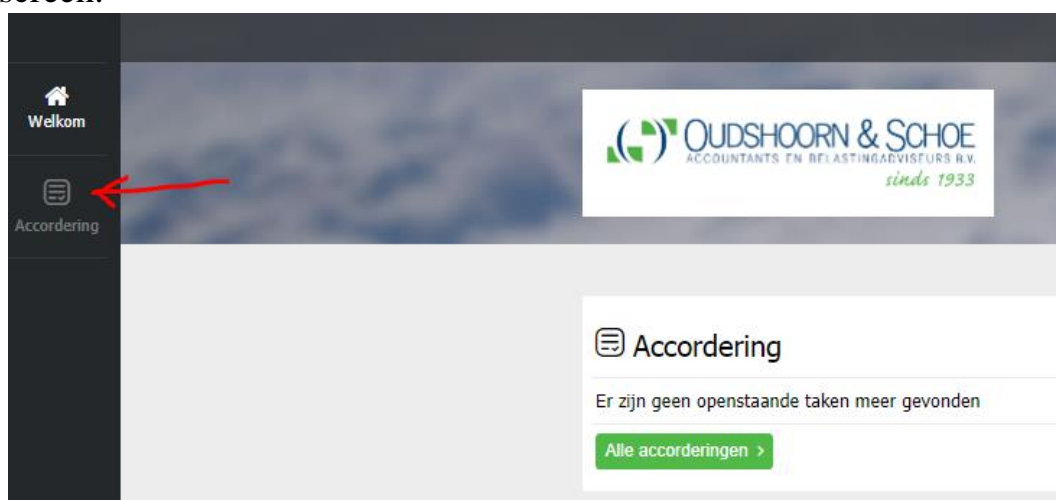
4.2 Approval of documents

If we prepare a document for approval in the portal for you, you will receive an email from the sender **Accountantsportal Oudshoorn & Schoe** with notification that one or more documents are ready for you to be approved.

The link in that email will take you to the portal. You then need to log in to MijnAccountantsPortal.
You will immediately see the document that you need to approve.

If you do not use the link in the email, you will first have to log in to the portal and then click on the '**Accordering**' icon in the menu on the left side of the screen.

You will now enter the approval module.

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It contains all documents:

a. (**Openstaande taken**) That you still need to approve (open tasks);
b. (**Overzicht documenten**) That you have already approved in the past.

When there is a document on your screen, you can select it.
After selection, the document to be approved is openend.

At that point you can choose '**Goedkeuren**' of '**Afkeuren**'
= Approve or Reject.

When you choose '**Goedkeuren**' you will be asked whether you want to send the document immediately or later. If you want to approve multiple documents, you can choose '**Toevoegen aan wachtlijst'** = add to waiting list. After all documents have been approved, you can find them under the heading '**Klaar om te verzenden'**= Ready to send, at the top of your screen.

Upon approval you will receive an email with a security code.
You must enter this in the appropriate box.
There you can send the documents.

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Under '**Overzicht documenten**' = overview documents.
The status of the document is changed from '**Goed te keuren**'= approved to
'**Afgerond**'= completed.

The procces is the same for rejection, but you must provide a reason for
rejecting the document. The rejected document is then given the status
'**Afgekeurd'** = rejected.

4.3 Handling other documents

The publication are immediately submitted to the Chamber of Commerce,
without the intervention of an employee of Oudshoorn and Schoe.
In this way, you as an entrepreneur are the person who submits the publication
documents. After the Chamber of Commerce has received the publication
documents in good order, the status of the document changes to '**Goedgekeurd
via Digipoort/ BIV'** = approved by Digipoort/ BIV.
You will also receive an email.

Declarations (turnover tax, corporation tax and income tax) to the tax authorities
can also be approved here. The further processing (submitting the tax return)
takes place via the tax software package from Oudshoorn & Schoe. Naturally,
the process is handled according to all security requirements.

The tax returns will be submitted for approval via the portal at a later stage.

4.4 View history

Via '**Overzicht documenten' =** overview documents you can always find all
documents/ declarations and you can view the statusus of the documents there.
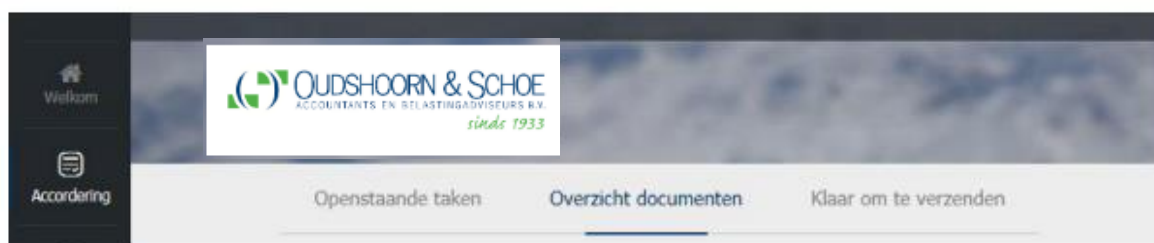
A selection of the declaration can be made by means of the fields at the top.

A filter can be applied to the following criteria '**Status'**, '**Jaar'**= Year and
'**Type'**. It is recommended to set all creteria to **[All]** and then select
'**Toepassen filter'**= apply filter. All available documents will then appear on
you screen.

5. Signature

5.1 General

Document scan be digitally signed on my accountant portal. The digital signature is legally valid and is therefore equivalent to a writtin signature on paper.

The documents which are prepared for signature are:

- Adoption of the annual accounts;
- Assigment confirmation (compilation assignment).

5.2 Signing of documents

If we prepare a document for you to sign in the portal, you will receive an email from **Accountantsportal Oudshoorn & Schoe** stating that the documents are ready for you to sign.

The link in that email will take you to the login screen of the portal. You must log in to MyAccountantsPortal. You will immediately see the document you need to sign. If you do not use the link in the e-mail, you will first have to log in to the portal and then click on the '**Accordering**' = approval icon in the menu on the left side on the screen. Under '**Openstaande taken**' = Open tasks, you can see the documents for which an action is required by you. Also the documents to be signed. Documents that still need to be signed by you have the status '**Wacht op handtekening(en) klant**' = Waiting for signature(s) customer.

If you click on one of the signing documents, you will see the document and the green buttons below to the left above the document
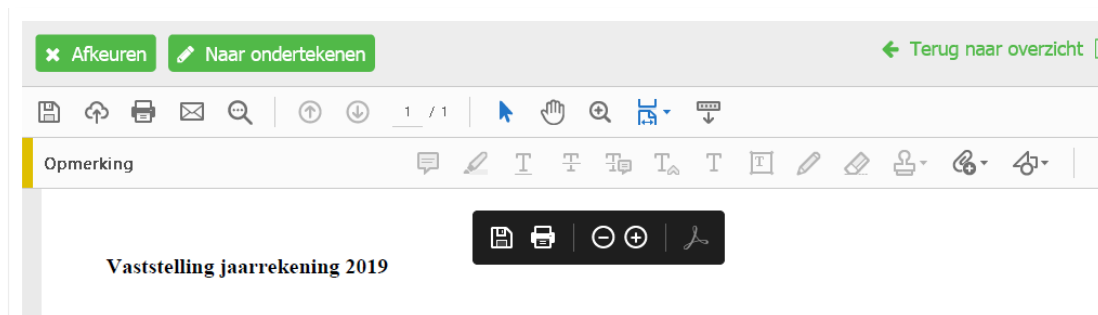
If you click the '**Naar ondertekenen**' = to sign button, you will be taken to the document where you need to sign. You can also scroll in the document to the place in the document where you need to sign (read 'digital statement of approval').

If you click on the yellow area with the text '**Klik om te onderteken**'
= click to sign. You will get the following screen.
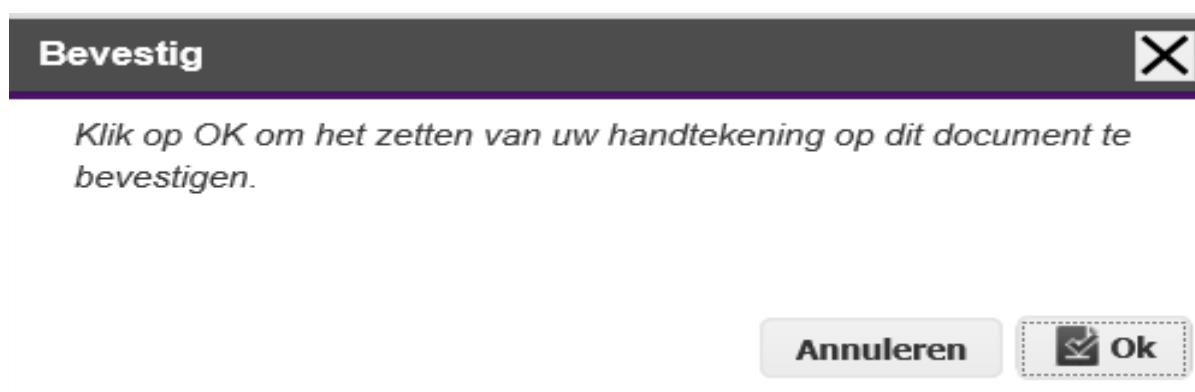
After clicking OK, the document will be digitally signed. If you are the only one to sign, the status of the document will be changed to **'Afgerond'** = completed.

If several persons (in case of multiple shareholders at a BV or all partners of a Vof) have to sign the document, the status will remain at **'Wacht op handtekening(en) klant'**= waiting for signature(s) customer.
after signing by all persons, the status will be changed to **'Afgerond'**= completed.

When you open the document, the digital signatures will be visible. See below

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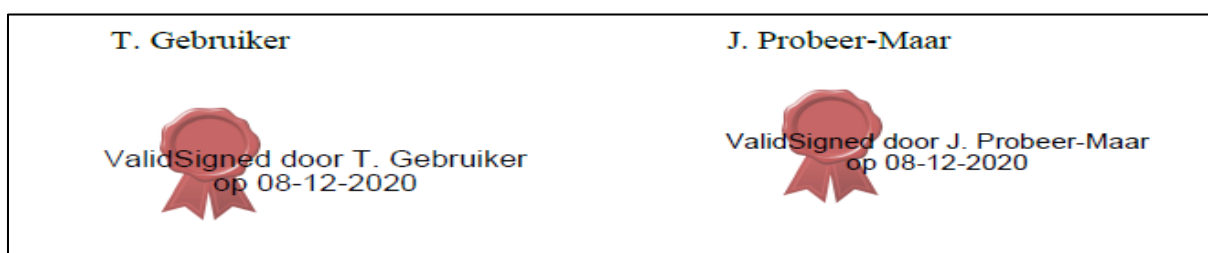
6. File

6.1 General
In this section you can view and save files on your PC or offer files securely to your contact person at Oudshoorn & Schoe.

6.2 Upload files
You can upload a document by clicking '**Bestand uploaden**' = upload file button to click.

Choose '**Bladeren**' = Browse to select a file from your own PC.

After the selected file has been chosen, the reference to the file appears in the text box.

Finally, click on the button '**Uploaden**'= Upload to securely send the selected file to Oudshoorn & Schoe.

The file that is sent in this way is delivered to the relationship manager by means of an email notification.

When uploading multiple files at once, please merge the files into one compressed (zipped) file (.zip).

6.3 View and download files

The files that are prepared for you by Oudshoorn & Schoe are included in the folder **'Uploads Oudshoorn & Schoe'**.

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If you click on the green tekst **'Uploads Oudshoorn & Schoe',** you will see a screen with all the files that we have prepared for you in the portal.
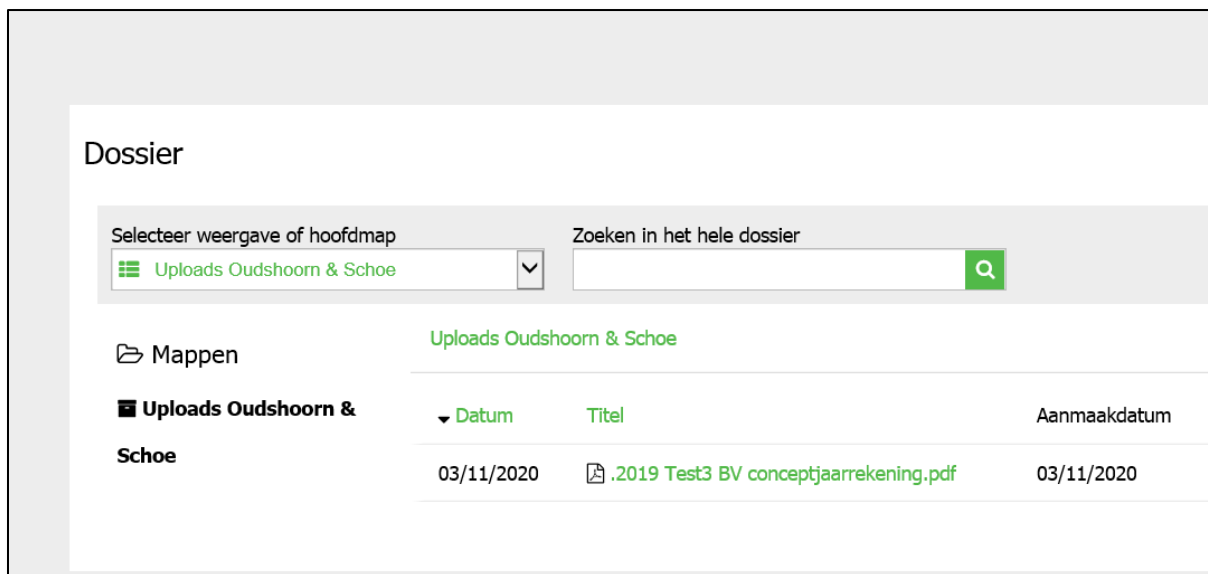
Here you can view the files by clicking on the file or download them by

clicking.

If you have several companies, you can switch companies by clicking on the green bar at the top right of the screen. Click on the name of the company whose files you want to view.

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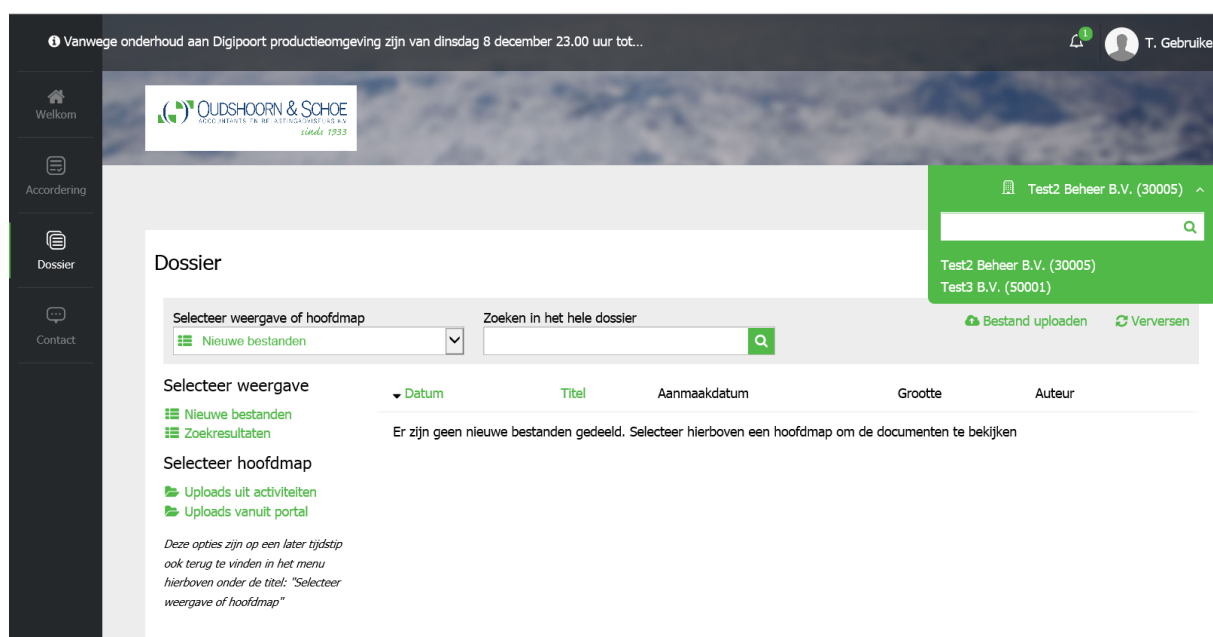
7. My profile

In MyAccountantsPortal it is possible to change your own data.
At settings: including your mobile phone number, your password and preferred organization can be adjusted here as desired.
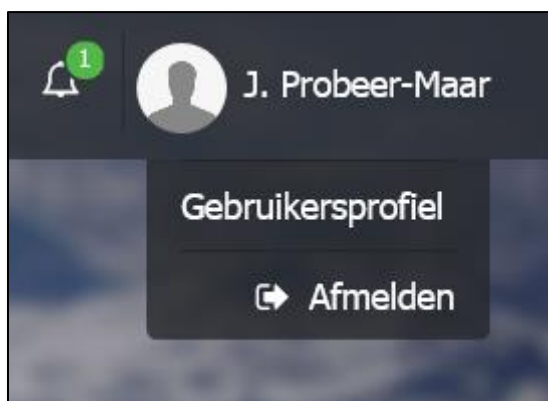
To adjust your own profile, click on '**Gebruikersprofiel**'= User profile.

In this section you can also connect your Ipad or tablet of mobile phone to use the **MyAccountantsPortal App**.

To save the changed data, click on '**Opslaan**'= Save.

8. Mobile App

The MyAccountantsPortal app can be download for free from the relevant app store. For iOS devices, such as the Iphone and iPad, this is the App Store. For Android devices this is the Google Play Store. Windows devices are currently not supported. After installation, the app will appear on your device and from here you can start the application.

To be able to use the App, you must link it to your accounts in MyAccountantsPortal.

You must log in via the web browser at www.mijnaccountantsportal.nl with your username and password and the code that you will receive by email. You will then arrive at the screen below.

Inloggen met beveiligingscode

Stap 1 - Installeer een authenticator app

Er zijn meerdere mobiele apps waarmee u een beveiligingscode kunt genereren om uw identiteit te bevestigen. De app van MijnAccountantsportal kan gebruikt worden als authenticator. Enkele andere bekende apps zijn Google Authenticator, Salesforce Authenticator, Authy en IBM Verify.

Stap 2 - Voeg de QR Code toe aan deze app

In de meeste apps kunt u de QR Code scannen. Mocht het scannen niet lukken, voer dan handmatig de code in die onder de QR code wordt getoond.

Stap 3 - Voer de code uit de app hieronder in

De app toont een 6-cijferige code die elke 30 seconden ververst wordt. Voer deze code hiernaast in.

E-mailadres

a.boersma@acuity.nl

Beveiligingscode *

Aanmelden
← Terug naar loginformulier

QR Code

DKZ66WVL5BSMRF3Q

Mocht het instellen van de authenticator app niet lukken, dan kan het instellen van de QR code worden overgeslagen.

Scan the QR code by clicking on the camera icon and the App wil be set as an authenticator, so you can log in next time.

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Enter the code (login token) that appears on the App and enter it on the portal login page via the web browser.

Afther you have succesfully logged into the portal via the web browser, you can complete the registration to use the App by clicking on ''I did this''.
Then choose ''Log in'' in the App and enter your login details once.
After loggin in, the App is ready for use.

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