

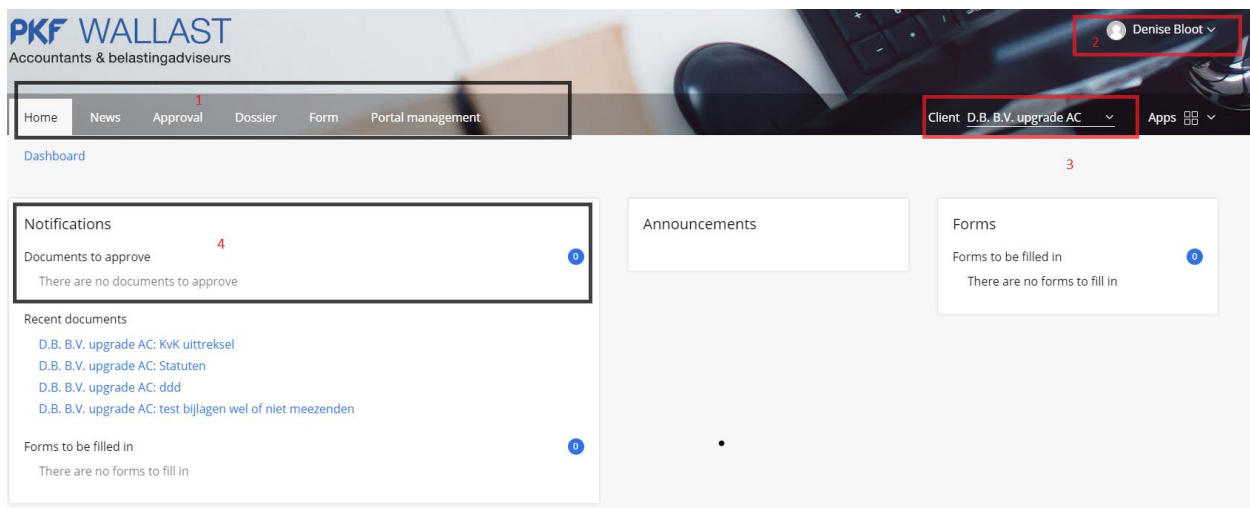
Get started with our customer portal

Our customer portal helps us optimise communications and work with you online. It is made up of several sections. We have explained the principal ones below. We hope you'll enjoy using our customer portal!

Home

The image below shows how our customer portal appears. There are several different sections, with modules in tabs at top of the screen and widgets on the content screen:

- 1. Modules** Click on the name of the module for more options in the menu.
- 2. User name** This shows the name under which you are logged in. You can change your password and other settings here too.
- 3. Client** If you own multiple organisations, such as holdings, you can switch between them here.
- 4. Notifications** This is a list of unfinished tasks.



Approval

Before we send certain documents to requesting parties such as the tax authorities, chambers of commerce or the bank on your behalf, we'd like you to have a look at them first and approve the contents. In this section, you can approve these documents online.

Instructions

To approve documents, such as tax returns or financial statements, follow these instructions:

1. Click on a document to examine it. You will be able to save the file afterwards.
2. Indicate whether or not you approve the document.
3. Go to the bottom of the page and enter the Authenticator-code that appears on the app of your smartphone. Then click on 'Send documents'. An on-screen message will notify you as to whether your approval has been successfully completed.

Click on 'Send SMS code' when u want to use the SMS-option.

PKF WALLAST
Accountants & belastingadviseurs

Home News **Approval** Dossier Form Portal management Client PKF Wallast Accountants & Belastingadviseurs

Approve Overview

Approval Approve

- 1 Approve documents**
Approve the documents here. Afterwards you can send them in step 2.

Document	Client	Approve before	
Annual Report Jan 1 2020 until Dec 31 2020	D.B. B.V. upgrade AC	Apr 28 2021	<input type="button" value="Agreed"/> <input type="button" value="Not agreed"/> ? Question? <input type="button" value="Log"/>

- 2 Confirmation & sending/filing**
You should confirm and send the 'Approval' or 'Non-approval' of the above documents. The document you approve will be provided with a digital signature.

I declare that I am the following person with the following e-mail address and that I am authorised on behalf of the following client to view and approve the documents, tax declaration(s) and/or financial statements reviewed and approved the documents to be approved. I give permission for the declaration(s) to be sent (electronically) to the Tax and Customs Administration where applicable. I am authorised to approve the and I am, if chosen to do so, authorised to file them. I have entered the information truthfully and correctly. I agree with this electronic method of specifying agreement (approval) and consider this a fully fledged to the placement of a signature.

Dossier

In the online dossier, you will find a handy archive of important documents. They are saved in a secure location and remain available to you at all times.

Upload document

Instructions

1. Select the 'Upload' subfolder in your dossier.
2. Click on the 'Upload' button.
3. Select the files
4. Fill in any comments.
5. Click on the 'Upload' button.

We'll receive a notification when you've uploaded a file.

Dossier Dossier

Refresh

D.B. B.V. upgrade AC

01. Permanent Dossier

02. Adviesdossier

Approval

Upload

Upload

There are no documents to display.

Show more results

+ New folder

Sort by: Name (a-z) ▾

Upload files

Cancel

Upload single files

☒ Inform my contact person about the upload of these document(s).

Possible note:



Drop files here or click to upload.

It is not possible to upload executable file formats (such as .exe). A virus check is made before posting the documents in your documents overview.

Upload

Portal management

Here you can change your data, set a new password and create user accounts for employees should you wish.

My account

Here you can change your own data.

My users

Here you can see which users have access to your companies and using 'Create New Client User' you can grant access to additional users. A wizard will guide you through the process of creating a new user.

My clients

Here you can view and change your clients' data. Changing your mobile phone number or the approval rights requires a new PIN code.

Installation on mobile device

You can install an app on your mobile device. The app is universal and works on iPhone, iPad, Apple Watch and Android. Download and install the Client Online by Pink Web Applications from the Apple Store or Play Store to your mobile device. When starting the program, you will need to enter your user name and password. Then, once only, you will have to enter the five-digit PIN code you chose and the SMS code that you receive.

The other sections of this 'Get started' have been written for PC/laptop use. Using the app on your mobile device may therefore differ from this.