
PwC Client Portal Manual for Clients

7 June 2011

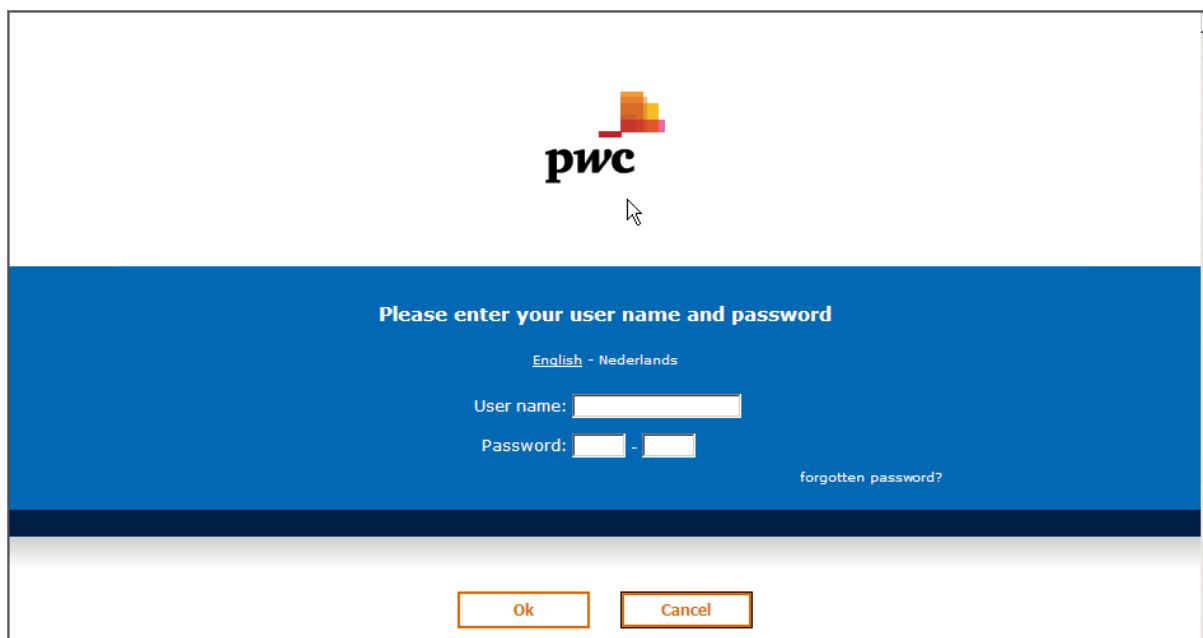


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1. *Client Portal*

In this manual, it is assumed that you already possess your username and password for the portal and the URL for the portal website. When you apply the URL, you will see the following screen:



The portal is available in both English and Dutch. Your intermediary has pre-set the language on the portal. You can always change the language setting. Your selection will be saved on the portal.

1.1. *Installing the digital certificate*

To further optimise the portal's security your intermediary uses Comodo security. When logging onto the portal for the first time, you need to follow an automatic process that will install a digital certificate on the web browser.


Once you have done this, the registration process is complete.

The following screenshots show the installation process for the digital certificate. The language setting for these screens depends on the language setting of the browser.



If the certificate has not been installed correctly, you will not be authorised to log onto the portal. In that case the incorrect certificate needs to be deleted before the (correct) certificate can and must be installed.

Step 1. When you log on for the first time, the following screen is displayed.


Client Portal

As part of our commitment to provide the highest levels of online security, we are strengthening our customer authentication processes. To complete this one-time process we request that you provide contact phone numbers and a contact email address. In the future, we shall use these details to contact you with an activation code whenever you login from a computer that is not registered with us.

Please select your preferred language
Language English

Please enter your contact phone numbers in the fields below. In the future, we will use these numbers to provide you with a one-time activation code whenever you login from a computer that is not registered with us.

Phone Type	Country Code	Phone Number
Home	United States	<input type="text"/> <input type="text"/> <input type="text"/>
Business	United States	<input type="text"/> <input type="text"/> <input type="text"/>
Mobile	United States	<input type="text"/> <input type="text"/> <input type="text"/>
Other	United States	<input type="text"/> <input type="text"/> <input type="text"/>


Please provide the e-mail address that you would like to use to receive an activation code.

E-Mail Address 1

E-Mail Address 2

If you are currently using a computer that you plan to normally use for accessing portals, you can enable it for secure and convenient access with a Digital Certificate. Your Digital Certificate will authenticate you and eliminate the need to provide an activation code each time you access your account. We strongly recommend that you only enable computers that you plan to normally use for accessing portals.

☒ Enable this computer with my Digital Certificate for future secure and convenient access to portals.

**Important Note!**
Upon clicking Continue, two "Potential Scripting Violation" warnings will appear. These warnings inform you that the site is (1) requesting a new certificate on your behalf and (2) adding it to your computer.
Click **Yes** to the two warnings to ensure proper installation of your digital certificate.

On this screen, you are requested to enter a telephone number and an e-mail address. These details will be used to provide you with a one-off activation code in the event that you register on a computer that is not registered with Comodo. Then tick the box in front of "Enable this computer with my Digital Certificate.... ". Click on "Continue".

Step 2. On the next screen that appears you are requested to accept Comodo's terms and conditions.

COMODO TF CERTIFICATE SUBSCRIBER AGREEMENT

ComodoTF CERTIFICATE SUBSCRIBER AGREEMENT

IMPORTANT - PLEASE READ THIS AGREEMENT CAREFULLY BEFORE APPLYING FOR, ACCEPTING, OR USING A COMODO TF CERTIFICATE. BY USING, APPLYING FOR, OR ACCEPTING A COMODO TF CERTIFICATE OR BY CLICKING ON "I AGREE" BELOW, YOU ACKNOWLEDGE THAT YOU HAVE READ THIS AGREEMENT, THAT YOU UNDERSTAND IT, AND THAT YOU AGREE TO THE TERMS AS PESENTED HEREIN. IF YOU DO NOT ACCEPT THE TERMS OF THIS AGREEMENT, DO NOT APPLY FOR, ACCEPT, OR USE A COMODO TF CERTIFICATE AND DO NOT CLICK "I AGREE" BELOW.


This agreement between you (the "Subscriber" or "you") and Comodo CA Limited ("Comodo"), which has its principal place of business at 26 Office Village, 3rd Floor, Exchange Quay, Trafford Road, Salford, Manchester M5 3EQ, United Kingdom, governs your use of Comodo's digital certificate services.

1. Definitions and Interpretations

☒ I agree


Check "I agree" and press "Submit".

Step 3. The following screen appears with a notification.


Client Portal

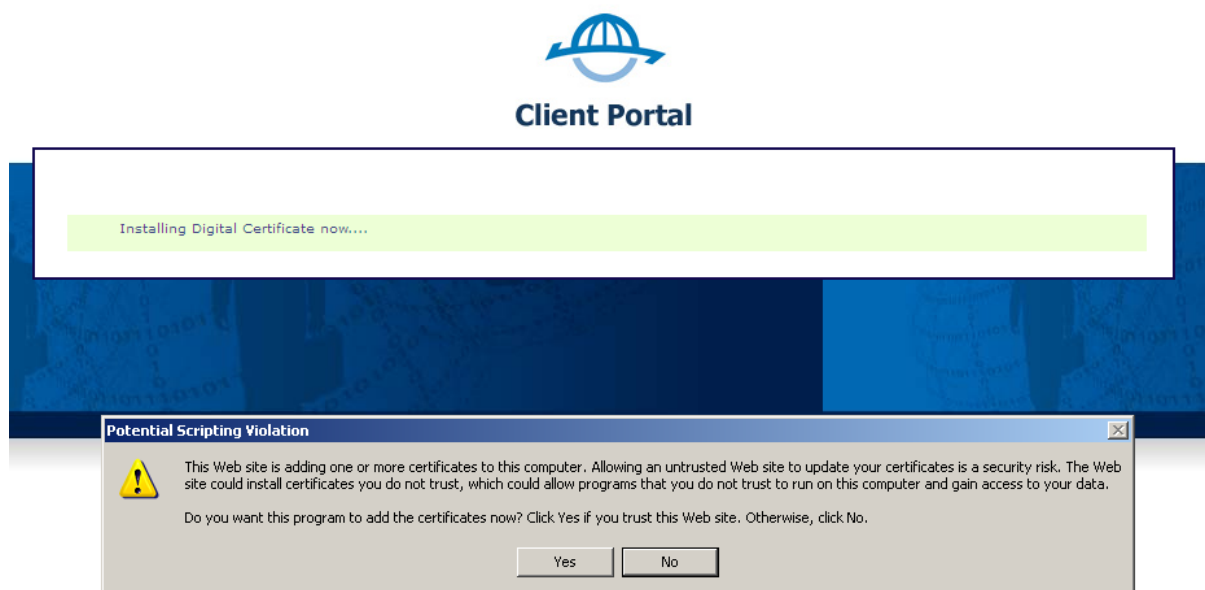
Generating Digital Certificate Request...

Potential Scripting Violation

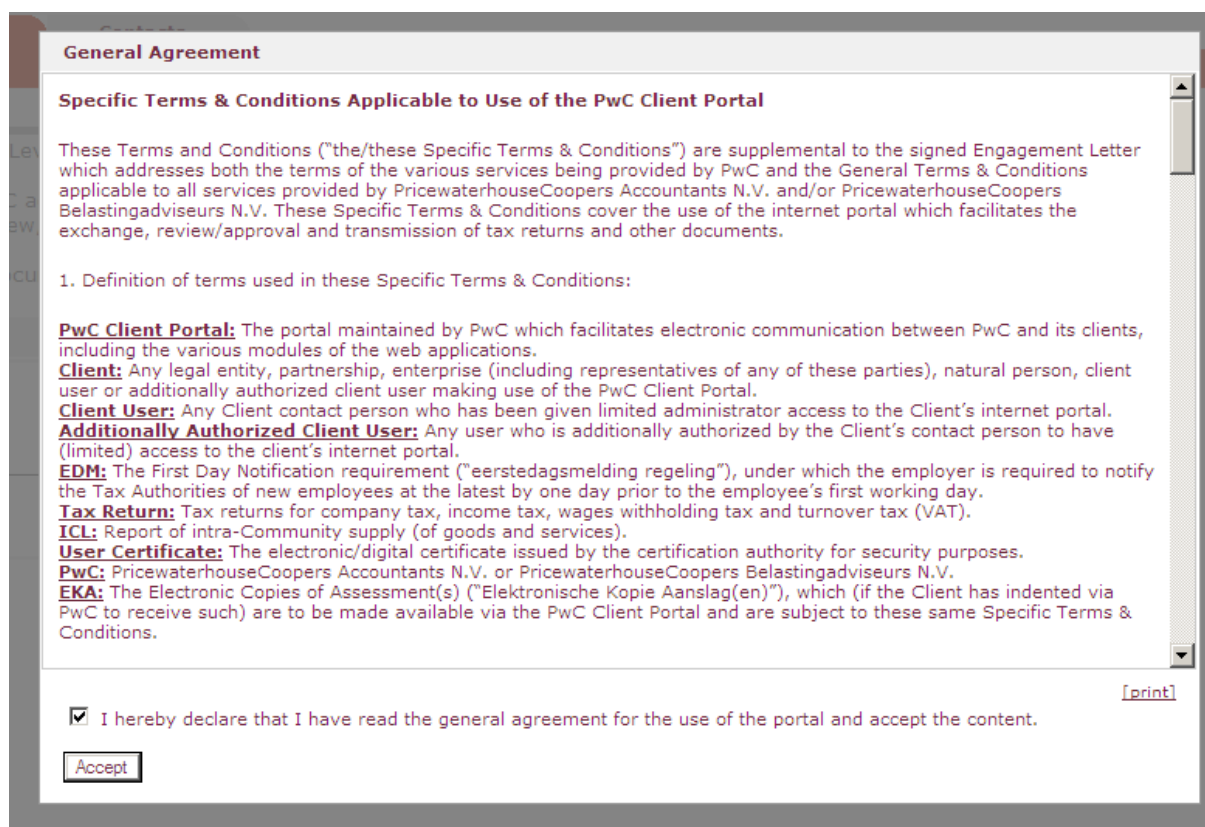
 This Web site is requesting a new certificate on your behalf. You should allow only trusted Web sites to request a certificate for you. Do you want to request a certificate now?

Please press "Yes" in the dialogue box.

Step 4. Please press "Yes" again in the next screen that comes up.




Step 5. In the next screen you are requested to accept PwC's terms and conditions.



You now have access to the portal, the registration process is completed.

1.1.1. Logging on to another computer

If you wish to log on to the portal on a computer different from the one on which you installed the certificate, you are requested to reregister with Comodo. You will receive an activation code for this on the e-mail address that you registered. The code can also be sent to your mobile.



Client Portal

This computer is not registered with us so you will need an activation code to log in to your account. Please select the phone number or email address that you would like to receive the code at. Afterwards, you will be given the opportunity to register this machine with us so that you will not need an activation code next time.

Phone SMS
☐ xxx-xxx-3405 ☐
E-Mail Address
☒ bxxxxe@xs4all.nl

[Click here if you have already received an activation code](#)

Choose the applicable radio button and press "Continue".



Client Portal

Please type your activation code into the space provided. If you plan to regularly use this computer to access your account in the future, we recommend you register it with us. Registering means you will not need an activation code the next time you want to login using this computer. To register this computer, you should check the box 'Enable this computer with my Digital Certificate for future secure and convenient access to portals.'

Please enter your activation code to login
Activation Code

You have already installed the maximum number of certificates allowed. No more digital certificates can be installed. Please, contact us for more details.

☐ Change security settings

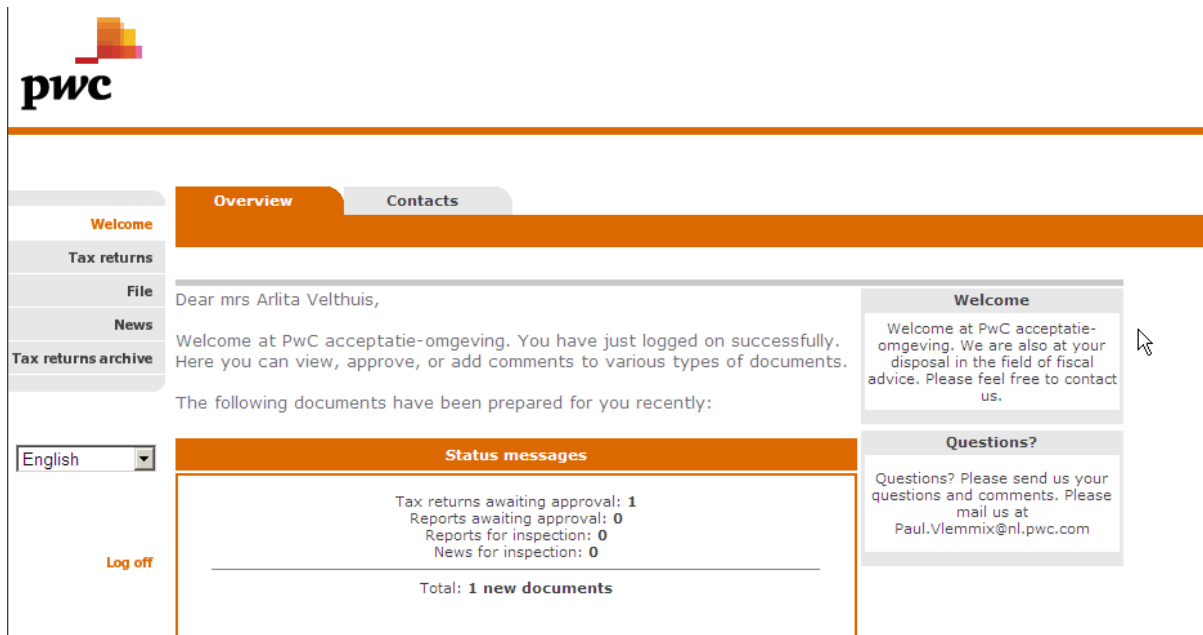
Enter the activation code in on this screen. Press "Continue".


If a certificate has already been installed on the computer, you will be sent a notification and will need to select one of the certificates installed.

Once accepted, you will have access to the portal.

1.2. Welcome

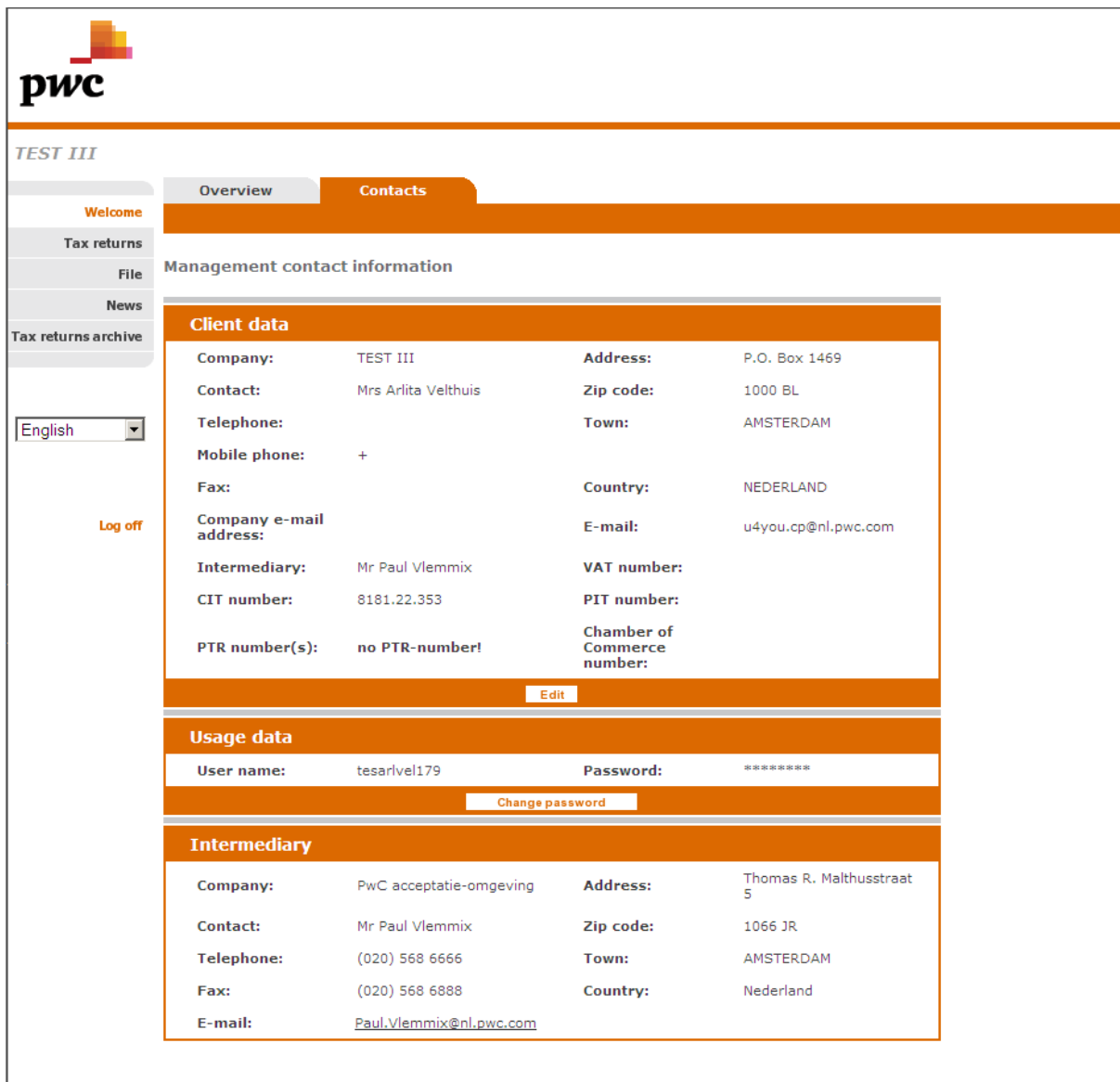
The Welcome screen shows you the number of tax returns and reports that have yet to be approved as well as the reports that have been published on the portal for you to view.



When you move the mouse over the number behind the tax returns and reports for you to approve and view, this following sign  appears. If you then click with your mouse on that number, a screen will open showing a detailed overview of the tax returns, the reports and the newsletters.

1.3. Contacts

In the "Welcome" section under the tab Contacts your personal details are shown.



pwc

TEST III

Overview **Contacts**

Welcome

Tax returns
File
News
Tax returns archive

English

Log off

Management contact information

Client data

Company:	TEST III	Address:	P.O. Box 1469
Contact:	Mrs Arlita Velthuis	Zip code:	1000 BL
Telephone:		Town:	AMSTERDAM
Mobile phone:	+		
Fax:		Country:	NEDERLAND
Company e-mail address:		E-mail:	u4you.cp@nl.pwc.com
Intermediary:	Mr Paul Vlemmix	VAT number:	
CIT number:	8181.22.353	PIT number:	
PTR number(s):	no PTR-number!	Chamber of Commerce number:	

Edit

Usage data

User name:	tesarvel179	Password:	*****
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Change password

Intermediary

Company:	PwC acceptatie-omgeving	Address:	Thomas R. Malthusstraat 5
Contact:	Mr Paul Vlemmix	Zip code:	1066 JR
Telephone:	(020) 568 6666	Town:	AMSTERDAM
Fax:	(020) 568 6888	Country:	Nederland
E-mail:	Paul.Vlemmix@nl.pwc.com		

You can change these details by using the Edit button. Your intermediary receives a notification by e-mail that includes the request to make changes. Once your intermediary has submitted the changes, you will receive a confirmation by e-mail.



All messages from the portal (for example the first part of your password or the message that your tax return requires your approval is posted onto the portal) are sent to the e-mail address entered on this screen.

1.4. Search function

The portal has a search function that enables you to search tax returns and reports. On each section, except for the section "Welcome" the field enter your search criteria is displayed

[Advanced search](#)

Type the term you want to search for in this field (search terms must contain at least two characters) and press ENTER. All returns will be displayed in which the search term appears in one or more of the columns. If you want to display all returns again, clear the search field and press ENTER.

An advanced search window is also available, by clicking on the link Advanced search.

The screenshot displays the PwC portal interface. On the left is a sidebar with the PwC logo and navigation links: "Welcome", "Tax returns", "File", "News", and "Tax returns archive". The "Tax returns" link is highlighted. The main content area features a "Search" section with four dropdown menus: "Search in" (set to "Tax returns"), "Type" (set to "All types of returns"), "Status" (set to "All status"), and "Period" (set to "2011"). A "Search" button is positioned below these dropdowns. At the bottom left of the sidebar, there is a "Log off" link. The page is titled "TEST III" at the top of the main content area.

Here you can provide detailed information on what you are looking for. In this way you can, for example, easily obtain an overview of all returns that still need to be approved. Regardless of what you selected under Search in extra fields appear in which you can refine your search. Click on the SEARCH button to start the search.

1.5. Returns

On the tab Overview in the section "Returns" you will find the returns that you need to approve or that you have approved.

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Welcome

Overview CIT

Tax returns

File enter your search criteria Advanced search

News


Tax returns archive

Type	Time period	Placement	Status	
CIT	2009	05-06-2011 12:18	Wait for approval	View

English

Log off

Additionally, for each kind of return there is a tab which includes all returns of that particular type that you still need to approve or that you have approved. If your intermediary has indicated that you can view more portals, an overview of the client for which the returns can be shown is provided in the drop-down list in the top-right of the screen. (see 1.7.1 Holding portal)

If you click on the button  the details of the return will be displayed. The return is included in this window as a pdf file.

pwc

Welcome

Tax returns

File

News


Tax returns archive

English

Log off

For inspection

Corporate income tax

Client	TEST III
Tax return number	8181.22.353
Assessment number	-
Time period	Full year 2009
Tax return rapport	 View report

Notices

No notices have been placed...

Add notices

Add notices

☐ Before you can approve the return and submit it to the Tax Authorities, you must first confirm that you have reviewed and checked it. You can then approve the return and submit it to the Tax Authorities by clicking on the "Accept" button.

If you do not agree with the return, you should reject it by clicking on the "Reject" button.

As authorized representative, I hereby confirm on behalf of TEST III, hereinafter "the Taxable Entity", that I have read and concur with the contents of this return.

Furthermore, I authorize PricewaterhouseCoopers Belastingadviseurs N.V. and/or PricewaterhouseCoopers Accountants N.V. and/or PricewaterhouseCoopers Compliance Services B.V. and the third parties they have engaged (hereinafter: "PwC") to file this return electronically with the Tax Authorities on behalf of the Taxable Entity. On behalf of the Taxable Entity I confirm that I am aware that I remain responsible to the Tax Authorities for the timely filing of the return and also that I am aware that the use of electronic systems such as this involve the risk of breakdown in data transmission between the Tax Authorities and PwC and that any liability of PwC in relation thereto is limited to three times the amount of the fees paid or payable for the return (and/or other documents) in question and the related services, unless the liability is related to an intentional act or wilful recklessness on PwC part.

Accept Reject

Status of the tax return:

- ✓ Tax return uploaded/prepared
- ✓ Wait for approval (05-06-2011 12:18)
- ✓ Approved by client
- ✓ Sent to Tax Authorities
- ✓ Received correctly by Tax Authorities

By typing text in the box and then clicking the ADD NOTICES button you can add additional comments.

If you agree with the return, you should tick the box in front of the sentence "Before you can approve the return"and then click ACCEPT.

If you do not agree with the return, then you should click on the REJECT button. In the window that then appears, you are required to provide us with your reasons for rejecting the return.

Reject

Are you sure you want to reject the tax return?


Below, you have to enter a reason for rejection.

Ok Cancel

When you approve or reject the return, you will be informed by e-mail.

1.6. File

In the section "File" you will find all documents which have temporarily or permanently been placed on your portal for approval or reference.



pwc

Welcome

Tax returns

File

News

Tax returns archive

English

Log off

Temporary

Permanent I

Permanent II

Overview

Recommendation

Fiscal

Salary

Annual account

Financial

Advanced search

Type	Placement	Status	File
No files found			

1.7. Returns archive

Under the tab Overview in the section "Returns archive" you can find all returns that have been rejected by you or that have been approved or rejected by the Tax authorities.

The screenshot shows the PwC Tax returns archive interface. On the left is a sidebar with the PwC logo and navigation links: Welcome, Tax returns, File, News, and Tax returns archive (highlighted). Below these is a language dropdown set to 'English' and a 'Log off' link. The main content area has two tabs: 'Overview' (active) and 'CIT'. Below the tabs is a year filter: 'Year: 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |'. Below the year filter is a search bar with the placeholder 'enter your search criteria' and a link to 'Advanced search'. Below the search bar is a table with the following data:

Type	Assessment number	Time period	Placement	Status	
CIT	-	2009	07-06-2011 13:38	Geweigerd door cliënt	View

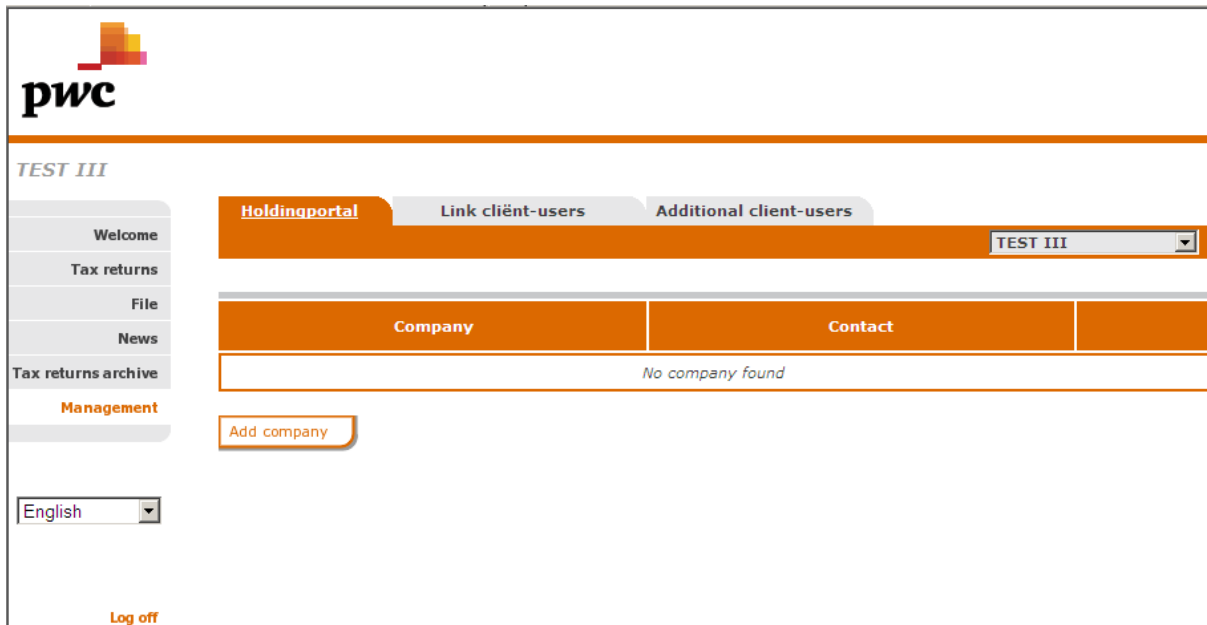
In addition, for each type of return there is a tab in which all returns of that particular type are displayed, whether approved or rejected. Returns are sorted by fiscal year. If your intermediary has provided you with access to more portals, then the drop-down list in the top-right of the screen provides an overview of the client for which the returns are available.

1.8. Management


If you have more than one portal (for example a holding company with several companies), and you want to view all the portals for your companies, then you only need to log in once to view all your portals.

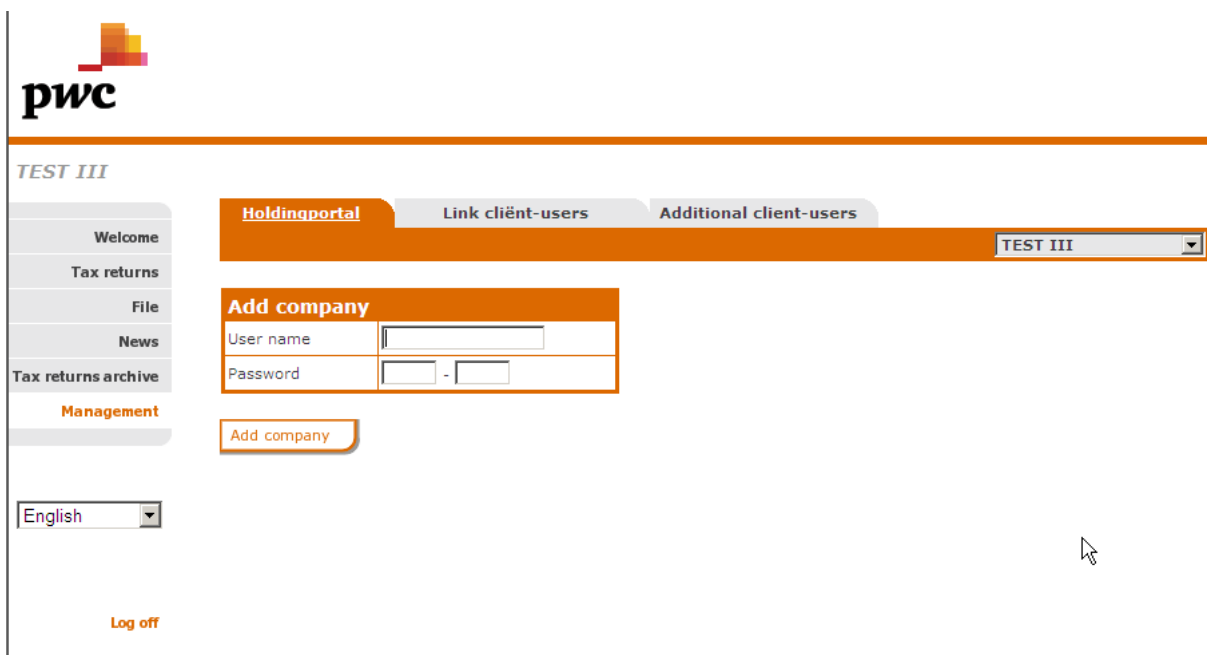
1.8.1. Holding portal

Once your intermediary has activated your holding portal option, you are able to determine which other portals need to be shown at the same time. You can define this using the section "Management". The tab Holding portal provides you with an overview of the linked portal(s).




The screenshot shows the PwC Management interface. On the left is a sidebar with the PwC logo and a menu containing: Welcome, Tax returns, File, News, Tax returns archive, and Management (highlighted). Below the menu is a language dropdown set to 'English' and a 'Log off' link. The main content area has three tabs: 'Holdingportal' (active), 'Link cliënt-users', and 'Additional client-users'. A dropdown menu on the right shows 'TEST III'. Below the tabs is a table with columns 'Company' and 'Contact'. The table is empty, displaying the message 'No company found'. Below the table is an 'Add company' button.

Click on the  button to add the portal(s). The following window appears:




The screenshot shows the PwC Management interface with the 'Add company' form open. The sidebar is identical to the previous screenshot. The main content area shows the 'Holdingportal' tab active. The 'Add company' form has two input fields: 'User name' and 'Password'. Below the form is an 'Add company' button. A mouse cursor is visible on the right side of the screen.

Enter the username and the password of the new entity and then click on the  button.

Repeat this for every new entity.



Your intermediary can help you by doing this for you in the PwC system.



TEST III

[Welcome](#)
[Tax returns](#)
[File](#)
[News](#)
[Tax returns archive](#)
Management

Holdingportal

Link cliënt-users

Additional client-users

TEST III

Company	Contact	
TEST IV	Mrs Arlita Velthuis	Delete

[Add company](#)

English

Log off

1.8.2. Additional client users

On the tab Additional client users a maximum of 10 additional users can be given access to the portal in addition to the main user. You can contact your contact person with PwC for this extra functionality.

When you click on the tab Additional client users the following window appears.

The screenshot displays the PwC portal interface. On the left is a sidebar with the PwC logo and navigation links: Welcome, Tax returns, File, News, Tax returns archive, and Management. Below these is a language dropdown set to 'English' and a 'Log off' button. The main content area has three tabs: 'Holdingportal', 'Link cliënt-users', and 'Additional client-users'. The 'Additional client-users' tab is active, showing a view of additional client-users. It contains two sections: 'Additional client-users van TEST III' and 'Additional client-users van TEST IV'. Each section has a table with columns for 'Additional client-user' and a 'View' button. The 'TEST III' section shows 'No employees' and a 'Create new additional client-user' button. The 'TEST IV' section shows 'Mrs Arlita Velthuis' and a 'View' button. A mouse cursor is pointing at the 'Create new additional client-user' button.

The button **Create new additional client-user** enables you to add a new extra client user. The window below shows you how you can document the user details and rights in three steps. In the first of the three steps you should enter the details of the new user.

The screenshot displays the PwC portal interface. On the left is a sidebar with the PwC logo and navigation links: Welcome, Tax returns, File, News, Tax returns archive, and Management. Below these is a language dropdown set to 'English'. The main content area has three tabs: 'Holdingportal', 'Link cliënt-users', and 'Additional Client-users'. The 'Additional Client-users' tab is active, showing a form titled 'Add additional client-user - Step 1 - 4'. The form includes fields for Gender (set to 'mr'), First name, Infix, Surname, E-mail, Mobiel nummer, and Language (set to 'English'). A 'Next' button is visible at the bottom of the form. A mouse cursor is pointing at the 'Next' button.

Please note that e-mail is a required field.

pwc

TEST III

Welcome
Tax returns
News

English

Holdingportal Link cliënt-users **Additional Client-users**

Add additional client-user - Step 1 - 4

Gender: mr
First name:
Infix:
Surname:
E-mail:
Mobiel nummer:
Language: English

Next

Use the button **Next** to go to the next window.

In this window you can link the additional client user to the company or companies you granted access for. If a holding portal is not applicable, this step is will be skipped.

pwc

TEST III

Welcome
Tax returns
File
News
Tax returns archive
Management

English

Holdingportal Link cliënt-users **Additional Client-users**

Koppelen extra cliëntgebruikers aan ondernemingen

Add additional client-user - Step 2 - 4


Rechten op ondernemingen:

☐ TEST III
☐ TEST IV

Next

Log off

Click **Next** to go to the next screen



TEST III

[Holdingportal](#)
[Link cliënt-users](#)
[Additional Client-users](#)

[Welcome](#)
[Tax returns](#)
[File](#)
[News](#)
[Tax returns archive](#)
[Management](#)

English

Log off

Add additional client-user - Step 3 - 4

TEST III


Welcome	Full control
Financial Online	No access
Web Payroll	No access
Fiscal news	No access
Tax returns + archive	Accessible
FDN	No access
CIT	No access
File	No access
News	No access

Next

In this window you determine which rights the extra client user has for the various sections of the client portal. This enables you, for example, to determine in the Welcome section whether the user has access to the Tax return + archive tab using the drop-down menu. If he is given this access, the user sees the tab in the Welcome window. You can then also determine whether the user is only allowed to read the information or whether he is also allowed to approve.

If a holding portal is applicable you have to repeat these steps for all entities.

Once you have given the rights , click on the button **Next** to continue with step 3.



TEST III

[Holdingportal](#)
[Link cliënt-users](#)
[Additional Client-users](#)

Add additional client-user - Step 4 - 4

Gender: mr
First name: Ruud
Infix:
Surname: Mohlmann
E-mail: u4you.cp@nl.pwc.com
Mobiel nummer: 051844597
Language: English

Rechten per onderneming TEST III

Welcome	Full control
Financial Online	No access
Web Payroll	No access
Fiscal news	No access
Tax returns + archive	Accessible
FDN	No access
CIT	No access
File	No access
News	No access

Disclaimer

The Client is wholly responsible for its use of the PwC Client Portal, for the user names and passwords allocated, for the determination and allocation of rights to Additionally Authorized Client Users (irrespective of the identity of the applicable PwC Client Portal User) via the user names and passwords allocated. The Client and/or the Additionally Authorized Client Users shall make use of the PwC Client Portal only with their own individually allocated user name and password. PwC and any third parties involved with PwC shall not be responsible, or be held responsible, for the Client's use of the PwC Client Portal, for the use of the user names and passwords allocated and for the use of the user names and passwords allocated to Additionally Authorized Client Users. The Client shall provide only the information requested within the context of the service provision, shall in no way violate third party intellectual property rights, and shall in no way interfere with or commercially exploit the system. The Specific Terms & Conditions to use the PwC Client Portal are applicable.

☐ Yes, I agree with the disclaimer.

Save

This window provides you with an overview of the details that you have entered for the additional user. If you agree with the disclaimer, then tick the box “Yes, I agree with the disclaimer” and **Save** these details. The new user will receive the first part of the password by e-mail. You or the main user have to provide him/her with the second part of the password.

The screenshot shows the PwC Holdingportal interface. On the left is a sidebar with the PwC logo, the user 'TEST III', and a menu with options: Welcome, Tax returns, File, News, Tax returns archive, and Management (highlighted). Below the menu is a language dropdown set to 'English' and a 'Log off' link. The main content area has three tabs: 'Holdingportal', 'Link cliënt-users', and 'Additional client-users' (which is active). Below the tabs, it says 'View additional client-users'. There are two sections: 'Additional client-users van TEST III' and 'Additional client-users van TEST IV'. Each section contains a table with one row showing a client user (Mr Ruud Mohlmann and Mrs Arlita Velthuis respectively) and a 'View' button. Below the first table is a 'Create new additional client-user' button.

Additional client-users van TEST III	
Additional client-user	
Mr Ruud Mohlmann	View
Create new additional client-user	

Additional client-users van TEST IV	
Additional client-user	
Mrs Arlita Velthuis	View

The button **Create new additional client-user** enables you to add additional client users. By using the button **View** you can view the details of previously added users. If you click on the **View** button for an extra client user, you will see the following detailed window:



19 B.V.

	Holdingportal	Link cliënt-users	Additional client-users
Welcome			
Tax returns			
File			
News			
Tax returns archive			
Management			
English			
Log off			

View contact information

Additional client-user data . - 19 B.V.			
Contact:	Dhr. Henk Kalkman	E-mail:	u4you.cp@nl.pwc.com
Mobiel nummer:	0653723405		
Language:	Nederlands		

Rights ' 19 B.V.	
Welcome	Full control
Financial Online	No access
Web Payroll	No access
Fiscal news	No access
Tax returns + archive	Accessible
FDN	No access
CIT	Inspect
File	No access
News	No access

Change Delete

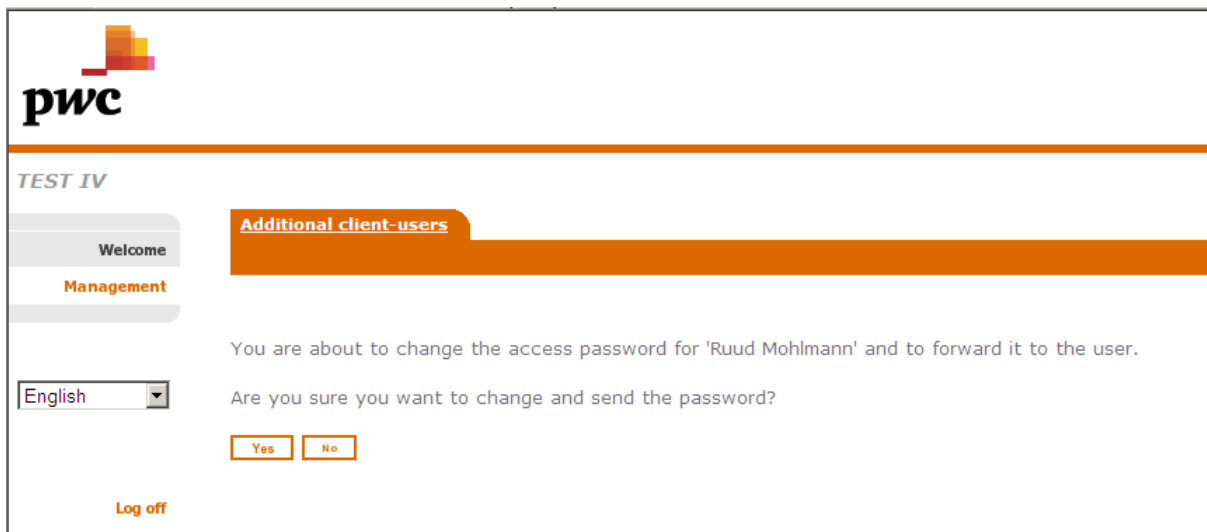
Usage data	
User name:	sonhenkal
Password:	**** np9y
Sample letter:	Download
Sample fax:	Download

Request a new password

Here you will also find the second part of the password of the new user.

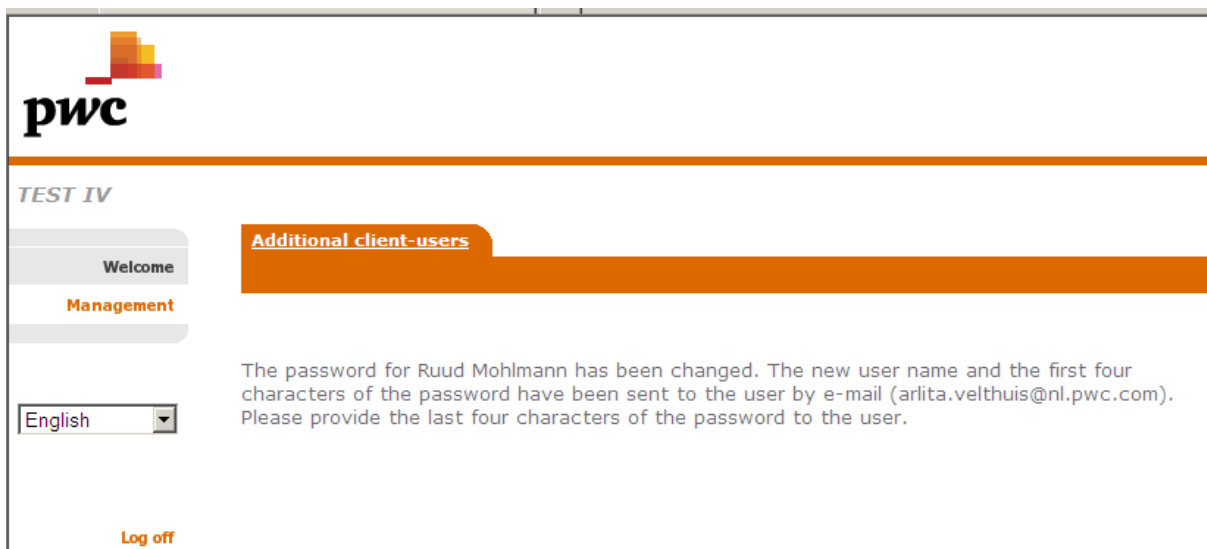
You can change or delete the client user details. Use the buttons **Change** and **Delete** to do this. If the user requests for a new password you can click the button **Request a new password**.

The following screen appears:



The screenshot shows the PwC logo at the top left. Below it, the text "TEST IV" is displayed. On the left side, there is a navigation menu with "Welcome" and "Management" (highlighted in orange). The main content area has a header "Additional client-users" in orange. Below this, a message states: "You are about to change the access password for 'Ruud Mohlmann' and to forward it to the user." This is followed by the question "Are you sure you want to change and send the password?" and two buttons: "Yes" and "No". At the bottom left, there is a language dropdown menu set to "English" and a "Log off" link.

Click on "Yes" to confirm, or "No" to cancel. If you confirm, you will see the following window:



The screenshot shows the same PwC interface as before. The message in the main content area now reads: "The password for Ruud Mohlmann has been changed. The new user name and the first four characters of the password have been sent to the user by e-mail (arlita.velthuis@nl.pwc.com). Please provide the last four characters of the password to the user." The "Yes" and "No" buttons are no longer visible. The "Log off" link remains at the bottom left.

The password has been changed. The new user name and the first four characters of the password have been sent to the user.

The second part of the password will be sent to you. Please provide the user of the second part of the new password.