

Manual Direct

The online platform from Moore MTH



MOORE MTH

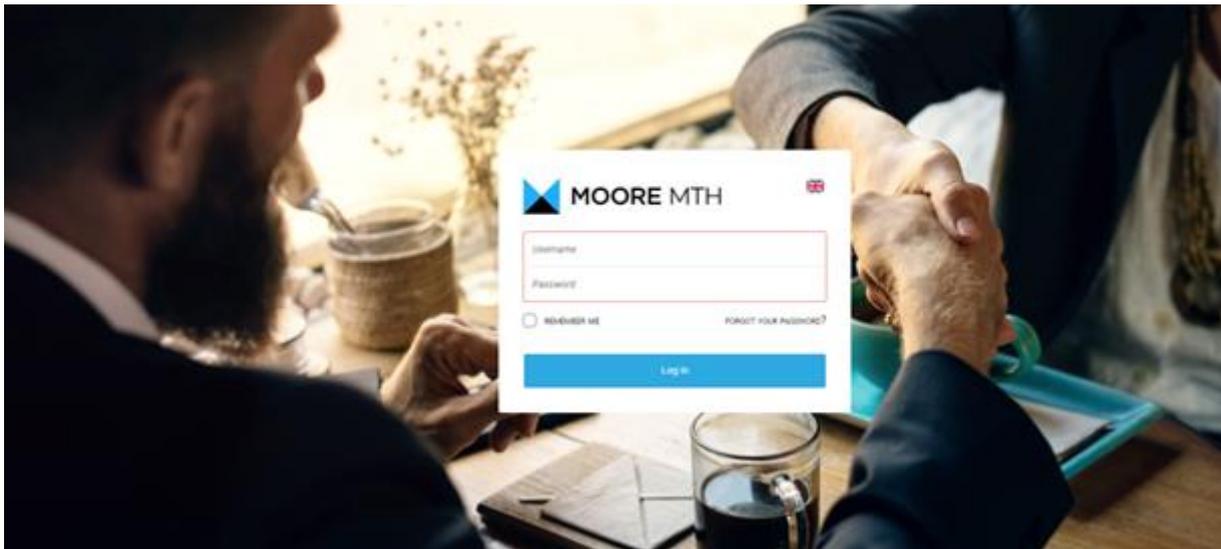
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Login to Direct

Step 1: Go to the website <https://www.moore-mth.nl> and click on “Direct”.

Step 2: Enter your username and password that you received from us by email.



Can't log in because you can't remember the password?

Then click on 'Forgot password' and enter your username and e-mail address. You will then receive an e-mail from the sender, Reeleezee.nl, with a link to create a new password.

Don't have a username or password?

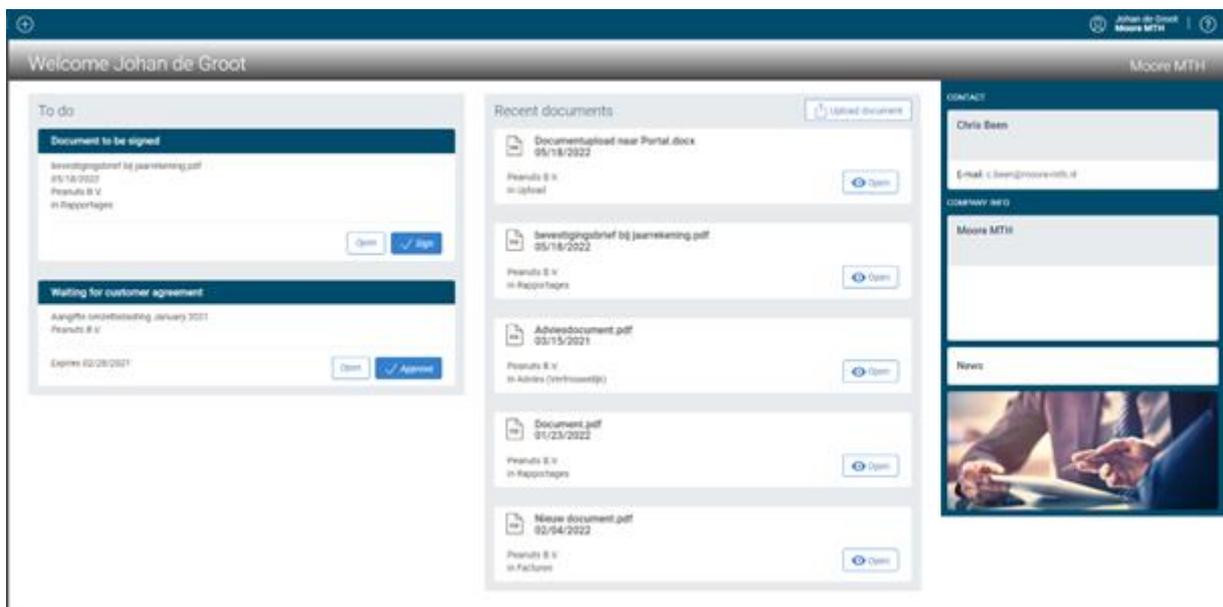
Then contact your account manager or the secretariat of your affiliated office. Via <https://moore-mth.nl/over-ons/locaties/> you can also find a phone number or e-mail address.

Dashboard

After successfully logging into Direct, you will automatically see your dashboard.

The dashboard contains:

- an overview of open to-do Items;
- recent documents added to your files;
- contact person for questions;
- comments and added news items.



Adjusting personal data

Adjusting language:

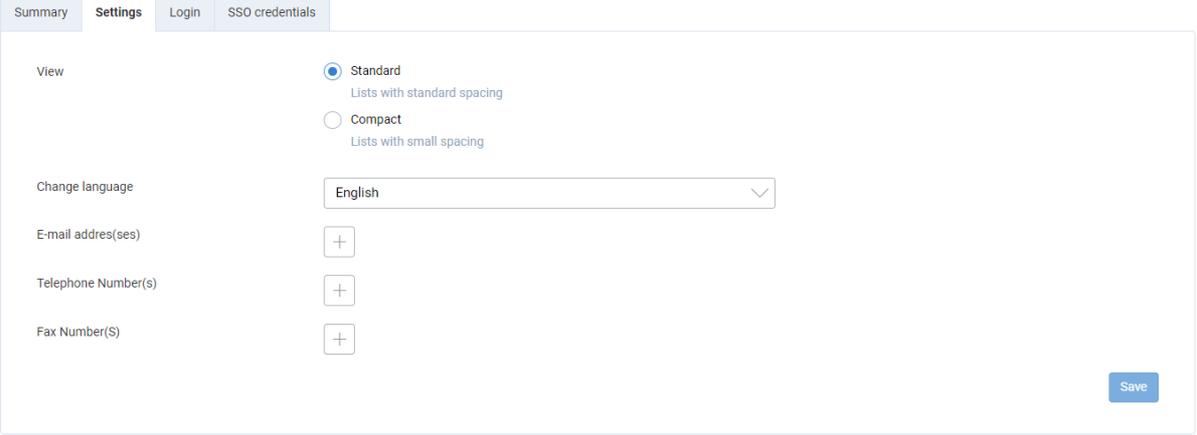
Step 1: Click on your name in the top right of the screen.

Step 2: Click on 'My Info'.

Step 3: Click on the 'Settings' tab.

Step 4: Under the 'Language' section, choose the appropriate language setting that works best for you.

My data



The screenshot shows the 'My data' settings page with the 'Settings' tab selected. The page has four tabs: 'Summary', 'Settings', 'Login', and 'SSO credentials'. The 'Settings' tab is active. The settings are as follows:

- View:** Two radio button options. 'Standard' is selected, with the description 'Lists with standard spacing'. 'Compact' is unselected, with the description 'Lists with small spacing'.
- Change language:** A dropdown menu currently showing 'English'.
- E-mail address(es):** A plus sign (+) button.
- Telephone Number(s):** A plus sign (+) button.
- Fax Number(S):** A plus sign (+) button.

A blue 'Save' button is located in the bottom right corner of the settings area.

Step 5: Choose 'Save'.

Please note that when you change the language, the notifications you receive from the portal will be changed to the language you just set.

Change username and/or password

Step 1: Click on your name in the top right of the screen.

Step 2: Click on 'My Info'.

Step 3: Click on the 'Login' tab.

Step 4: Enter your new username and/or password here. Please note the conditions your password must meet.

Step 5: Choose 'Save.'

To – do items

To-do is an overview of all your open tasks. Whenever a document, statement, declaration or deposit needs your approval, it will appear in your 'To-do'. As soon as you have completed a task, for example by signing a document, it will disappear from the to-do list. The list will be empty when there is no more document waiting for approval.

To do

Document to be signed

bevestigingsbrief bij jaarrekening.pdf
05/18/2022
Peanuts B.V.
in Rapportages

[Open](#) [✓ Sign](#)

Recent documents

In the middle of the dashboard you will see an overview called 'Recent documents'. This overview shows the last 5 documents that were recently added to your file. You can view the contents of the document by clicking on 'Open'. If there is an action associated with the document, then the document is also included in the 'To-do' overview.

Recent documents

[Upload document](#)

 **Documentupload naar Portal.docx**
05/18/2022

Peanuts B.V.
in Upload

[Open](#)

 **bevestigingsbrief bij jaarrekening.pdf**
05/18/2022

Peanuts B.V.
in Rapportages

[Open](#)

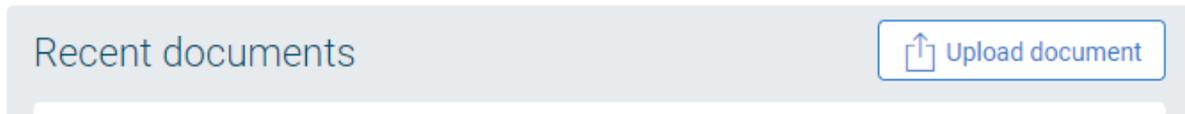
 **Adviesdocument.pdf**
03/15/2021

Peanuts B.V.
in Advies (Vertrouwelijk)

[Open](#)

Uploading documents

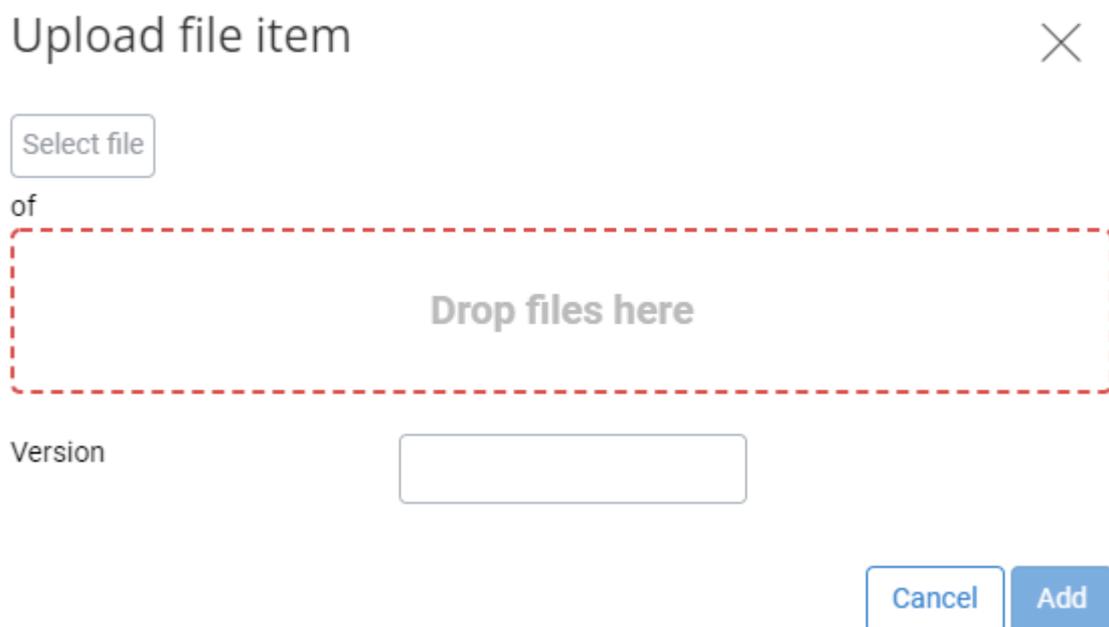
You can upload documents securely via the Direct portal. You do this by using the button 'Upload document' next to the overview 'Recent documents'.



You can then upload documents in 2 ways:

1. If it concerns one document, you can select a file by clicking on 'Select File'.
2. Or you can select all the files in your explorer and drag them to the 'Drop files here' area.

Then click on 'Add'.

A screenshot of a dialog box titled 'Upload file item' with a close button (X) in the top right corner. Inside the dialog, there is a 'Select file' button. Below it, the word 'of' is followed by a large dashed red rectangular area containing the text 'Drop files here'. At the bottom left, there is a 'Version' label and an empty text input field. At the bottom right, there are two buttons: 'Cancel' and 'Add'.

The document, or several documents, will then be placed in your file, under the folder 'Upload'.

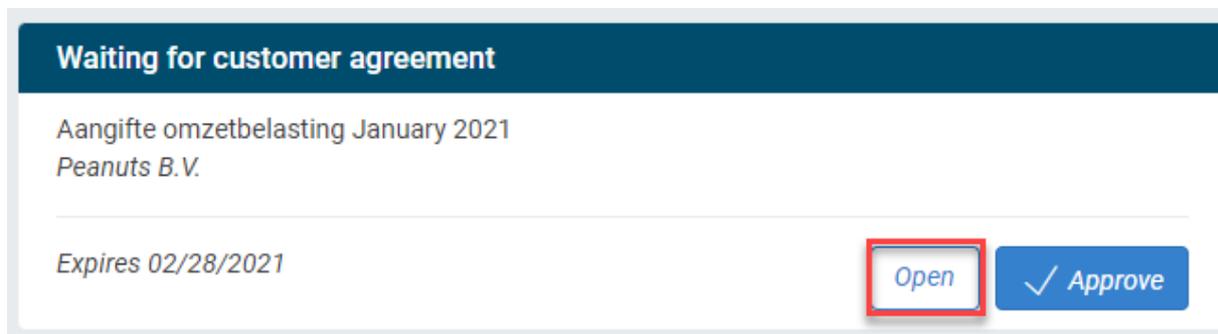
The account manager automatically receives a message that documents have been uploaded to your file.

Handling declarations

You will receive an email notification as soon as a declaration is ready for approval. In this e-mail you will be asked to log in to 'Direct' in order to approve the declaration in question. You will also see this declaration ready for you in your To-Do list. You can approve or reject your declaration by following the steps below.

Step 1: Go to the website <https://www.moore-mth.nl> and click on "Direct". Then log in with the known login details. If you are already logged into 'Direct', you can skip this step.

Step 2: In your 'To-do' list there is a declaration for which you must perform an approval. Click on 'Open'.



The screenshot shows a declaration card with a dark blue header that reads "Waiting for customer agreement". Below the header, the text reads "Aangifte omzetbelasting January 2021" and "Peanuts B.V.". At the bottom left, it says "Expires 02/28/2021". At the bottom right, there are two buttons: a white button with a red border labeled "Open" and a blue button with a white checkmark and the text "Approve".

Step 3: You will then see a summary of your declaration. If you agree with this declaration, click on 'Approve'.

Step 4: Click on the check box for 'Yes, hereby <contact person> agrees to' and then click on 'Approve'.

This action automatically sends the declaration to the requesting party.

Optional:

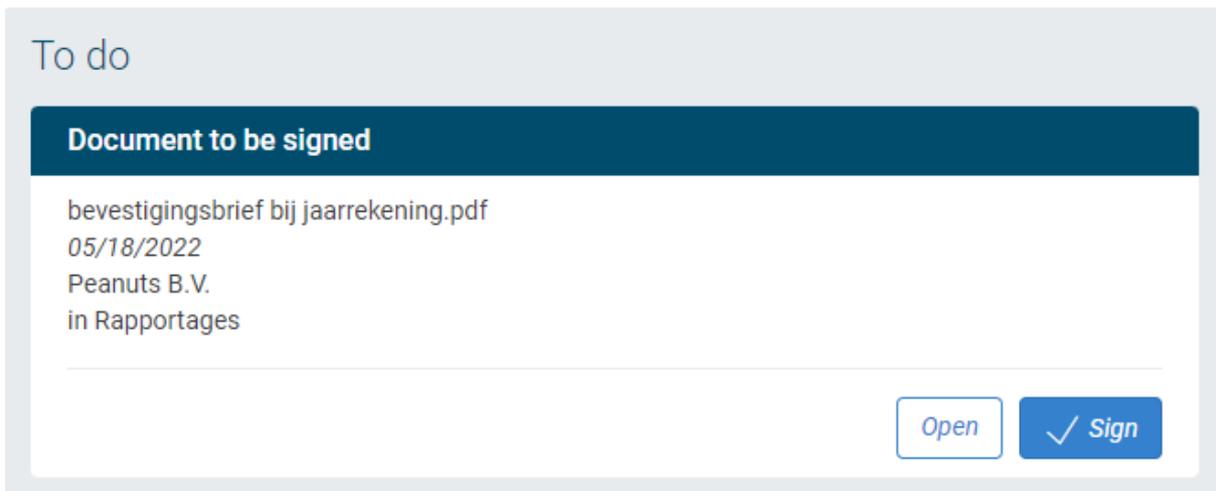
If you do not agree with this declaration, 'click on 'Reject'. This will cause, the declaration will be rejected and your account manager will receive a notification that the declaration has been rejected.

Signing documents digitally

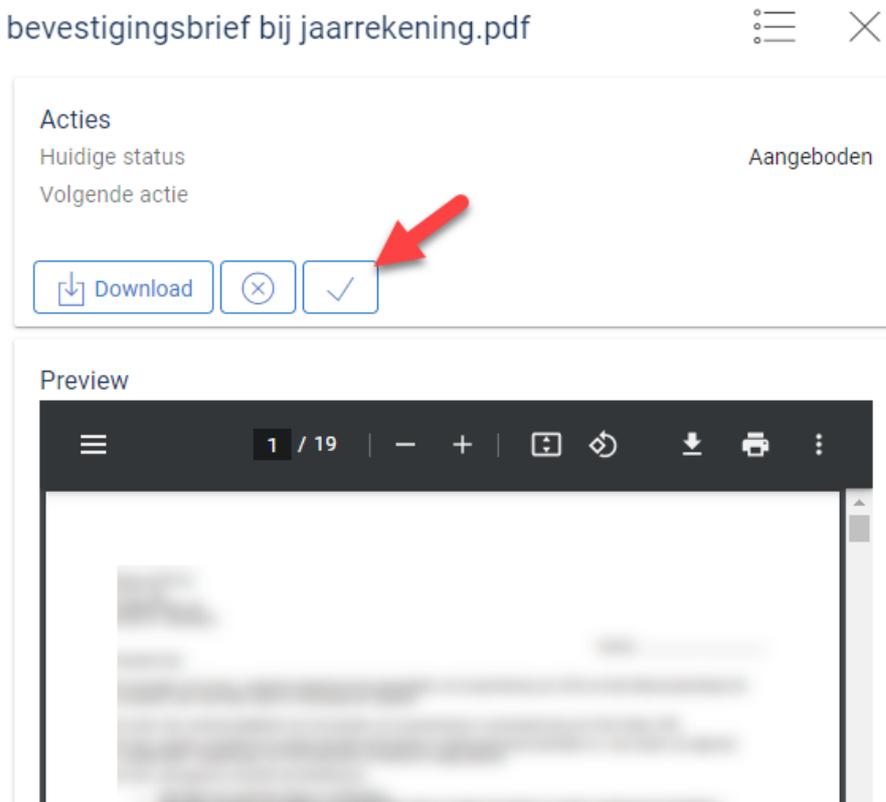
As soon as a document is ready for you to sign, you will receive an e-mail message stating that a document requires your digital signature. In your 'To-Do' list you will see that a document is ready for you to sign. By following the steps below, you can digitally sign a document.

Step 1: Go to the website <https://www.moore-mth.nl> and click on "Direct". Then log in with the known login details. If you are already logged into 'Direct', you can skip this step.

Step 2: In your 'To-do' list, there is a document that can be signed. Click on 'Open'.



Step 3: The document will then open. If you agree with what it says in this document, click on 'Sign'.



Step 4: Then click on 'Sign'.



The screenshot shows a dialog box with a close button (X) in the top right corner. The dialog contains the following information:

Document	bevestigingsbrief bij jaarrekening.pdf
Signature candidates	Johan de Groot (<i>Nog te ondertekenen</i>)
Certificate	MTH Holding B.V.
Remark	<input type="text"/>

At the bottom right of the dialog, there are two buttons: "Cancel" and "Sign". A red arrow points to the "Sign" button, which is highlighted in blue.

Optional:

If you do not agree with this document, click on 'Reject'. This will cause the document to be rejected and your account manager will receive a notification that the document has been rejected.

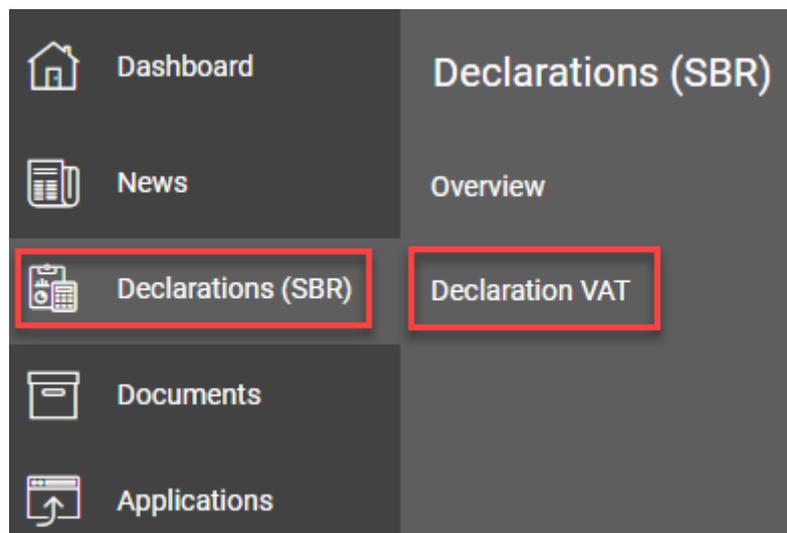
Overview of declarations

When you have approved a declaration from your 'To-do', it will disappear from 'To-do'. The completed document can then be viewed again by following the steps below.

Step 1: Move your mouse to the left side of the screen and click on the button

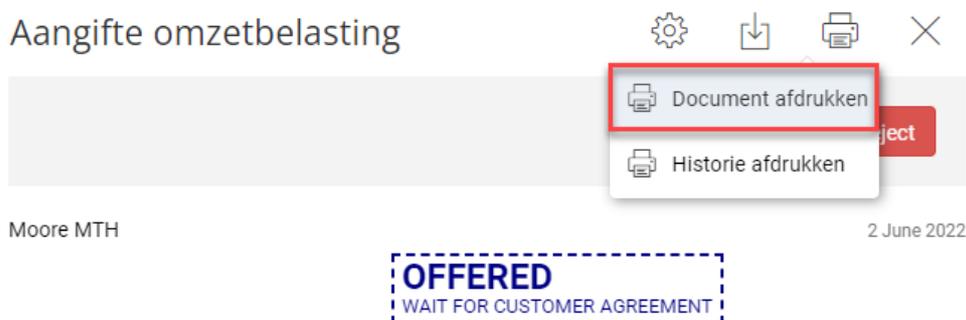


Step 2: Then choose the type of tax return/declaration you want to look up, in the example we will use 'Sales tax return'.



Step 3: At the top of your screen you will see a filter. Filter here on the correct year to view your declaration, then you will see a list of all declarations of the chosen type.

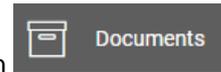
Step 4: By clicking on a declaration, you can open it in order to view it again and possibly print it. This can be done via the 'Printer' button.



File Overview

When you have approved a document from your 'To-do' it will disappear from 'To-do'. The completed document and the documents your accountant puts on file, can then be viewed by following the steps below.

Step 1: Move your mouse to the left side of the screen and click on the button



Step 2: Then click on

Overview documents

Step 3: You will then see a list of all your linked files. Click on the file you want to have access to.

Step 4: Next, you will enter your file. By default, this file contains the folders 'Declaration', 'Advice (confidential)', 'Invoices', 'Permanent', 'Personnel and Payroll', 'Reports' and 'Upload'. Depending on the content of the document, it is classified in one of these folders.

Step 5: To open the document, click on the name of the document. Then a 'preview' of the document will appear on the right side. Using the 'Download' button, you can save it to your own computer.

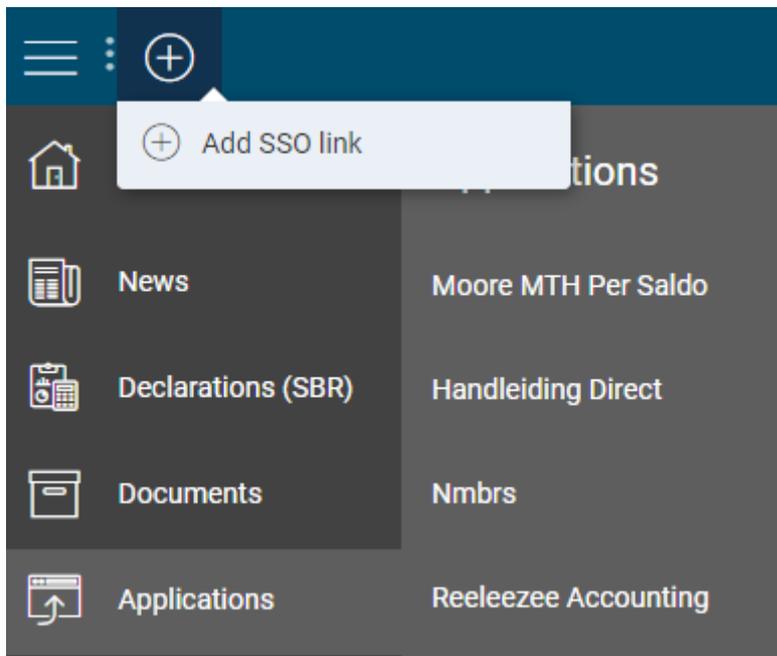
Applications

Under the 'Applications' button you will see what you have access to via Single Sign on, for example to 'Per Saldo'. Here you can also find the manual you are reading now.

Adding Single Sign On Connection

To create a new Single Sign On connection, you can follow the steps below.

Step 1: Click on the 'Plus icon' at the top left of your screen.



Step 2: Choose 'Add SSO link' and then choose the application you want to connect to. In this example, we will use 'LoketOAuth2SSO' to create a connection to 'Per Saldo'. Next, click on 'Save'.

Step 3: The selected option is then added in the 'Applications' overview. Click on the added option so that a new window opens.

Step 4: Enter your login information for 'Per Saldo'.

Step 5: Then click on 'Allow'.

After that, your registration is complete and you can automatically log in to your 'Per Saldo' environment, via Direct.