

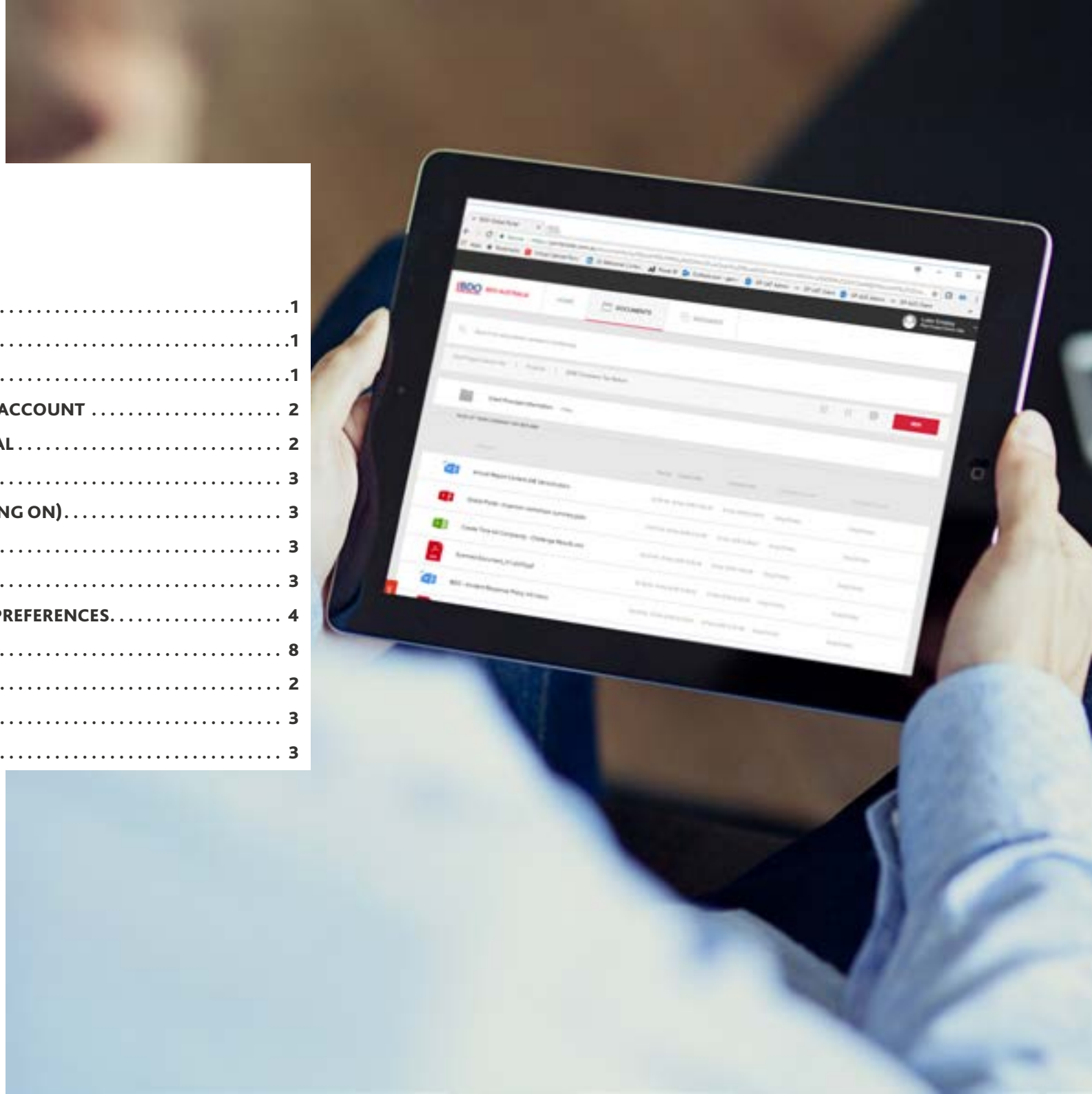
BDO GLOBAL PORTAL

GUIDE FOR CLIENTS

29 April 2020

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PURPOSE OF THIS DOCUMENT

This document has been written to provide BDO's clients with a basic guide on how to use the BDO Global Portal to securely exchange files and collaborate with BDO on projects the client has engaged BDO to work on.

WHAT IS THE BDO GLOBAL PORTAL?

The BDO Global Portal is a secure online cloud-based platform running on Microsoft SharePoint that is used by BDO (globally) to collaborate with our clients on projects we are working on.

Using the BDO Global Portal, BDO and our clients can communicate and exchange files for projects BDO is working on for the client. BDO and the client can manage who has access to the client's BDO Global Portal and the client's projects and files in their BDO Global Portal.

The URL to sign in to the BDO Global Portal is:
<https://portal.bdo.com.au>

BDO GLOBAL PORTAL HELP

If you need assistance signing in to or using the BDO Global Portal, please contact a member of your BDO project engagement team or email portal@bdo.com.au



HOW TO SET UP YOUR BDO GLOBAL PORTAL ACCOUNT

(REQUIRED FOR EACH NEW CLIENT USER)

A BDO team member (working on your project/matter), will need to invite you to use the BDO Global Portal. If you have been invited to use the BDO Global Portal, you will be sent an email 'From' noreply@bdo.global with the Subject: Welcome to the BDO Global Portal. Example in the screenshot opposite.



EXAMPLE EMAIL

Click the links in the email to read the Terms and Conditions, and to accept your invite

To create your BDO Global Portal account, please:

1. Click the link in the email to read and accept the BDO Global Portal [Terms and Conditions](#)
2. Click the link in the email to accept your invite.

HOW TO SIGN IN TO THE BDO GLOBAL PORTAL

1. Open your web browser and go to <https://portal.bdo.com.au> (BDO recommend using the Google Chrome or Microsoft Edge web browser.)
2. Enter or pick your account – the email address BDO sent your BDO Portal invite to.
3. Enter your email account password or enter the code sent to your email address. (If your email address is associated with a Microsoft account, enter your Microsoft account email address and password.)
4. Click Sign in

If this is the first time you are signing in to the BDO Global Portal, you may be prompted to review and accept permissions, terms and conditions.

If your invite was sent to an email address associated with a Microsoft account

If the email address your BDO Global Portal invite was sent to is associated with a Microsoft Office 365 subscription or a Microsoft account (e.g. @outlook.com, @hotmail.com, @live.com, @msn.com, @passport.com) you will need to sign in with your existing Microsoft account email address and password. Please note that BDO does not see or have access to your Microsoft account password.

At the BDO sign in page (example screenshot below), enter your email address - the email address your BDO Global Portal invite was sent to - and click Next.



Steps if your invite was sent to a non-Microsoft email address

If your BDO Global Portal invitation was sent to an email address not associated with a Microsoft account, after you enter your email address and click Next, a code will be sent to your email address.



Check your email Inbox for an email with Subject: Account verification code.

Enter the code (that's in the email), then click Sign in

BDO GLOBAL PORTAL HOME SCREEN

After signing in, your BDO Global Portal Home screen will display.



DOCUMENTS (FOR PROJECTS BDO IS WORKING ON)

Documents is where you can to see Projects you have engaged BDO to work on (if you have access to the Project), and documents/files that are a work-in-progress - that you and BDO can edit.

EXCHANGE (FILES WITH BDO)

Exchange is where you exchange files with BDO. If BDO have requested a file from you, this is where you upload the file and deliver it to BDO. You can also download that BDO have uploaded.

ORGANISE (TASKS TO BE COMPLETED)

Organise is used to see and manage tasks requiring your attention – for example if BDO need you to provide files or sign a document.

After clicking Organise, click the Project on the left, or search for the Project.

You can use the toggle (on the right) to switch between Task list or Calendar view. You can click on a Task to action it.



SEARCH FOR PROJECTS

You can click here and type a keyword to search for a Project.


CALENDAR VIEW

You can toggle between Task or Calendar view

BDO GLOBAL PORTAL EMAIL NOTIFICATION PREFERENCES

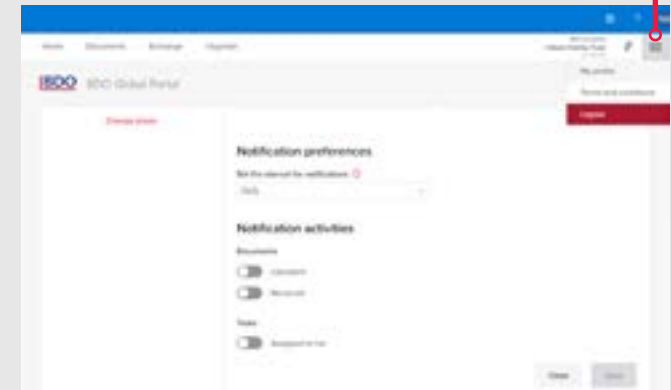
You will receive email notification 'From' noreply@bdo.global when:

- ▶ There is a new request to provide files to BDO
- ▶ A request is assigned (to a person)
- ▶ The status for a request has changed (for example, when a requested file has been Accepted or Rejected by BDO)

To choose how often you want to receive BDO Global Portal email notifications, and what activities you want to be notified about (for example, tasks assigned to you) click  top right of the window, then click My profile

After choosing your preferences, click Save.

To set your email notification preferences click here then click *My profile*.



HOW TO EXCHANGE FILES WITH BDO

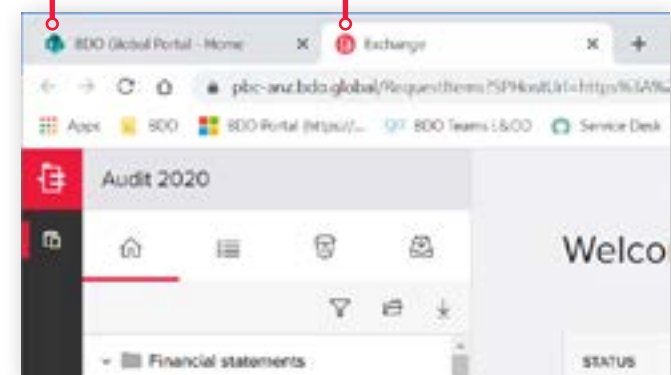
If BDO need you to provide files for a Project we are working on, you will be sent a file request email notification. The file request task will display in the Organise area of your BDO Global Portal. If you are in Calendar view, the task will display on the due date.

To provide files that BDO require to complete your project work:

1. Click Exchange (top of the BDO Global Portal window or on the Home page).


Exchange will open on a new tab in your web browser. You can switch between viewing your BDO Global Portal Home page and the file Exchange by clicking the tab top of your web browser.

To switch between the BDO Global Portal and Exchange, click the tab at the top of your web browser

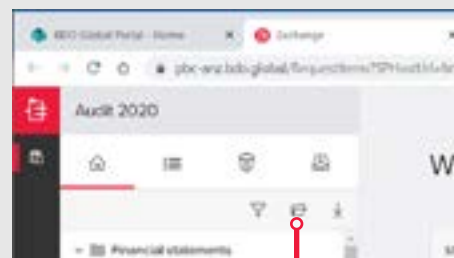


Request categories display on the left of your Exchange window - represented by a folder.

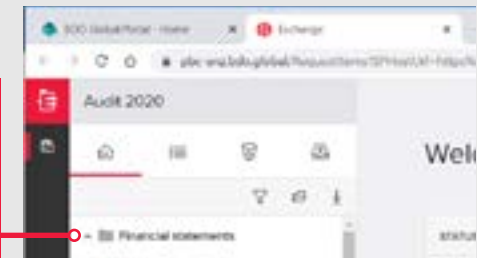
To display files requested either:

- ▶ Click  to expand all folders and see all file requests for all categories; or
- ▶ Click on a folder to see names of files that BDO wants you to provide for that category.

Click here to expand and view requested files for all categories

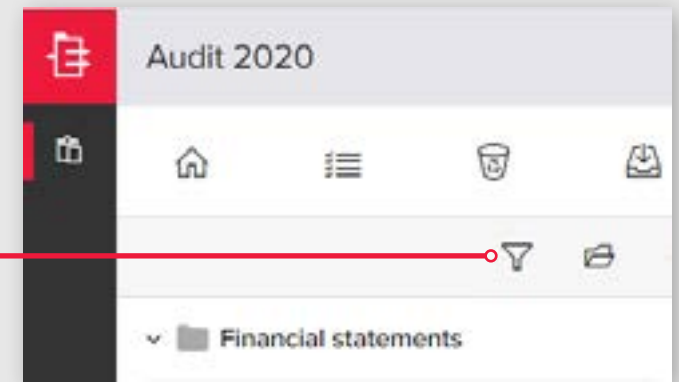


Click on a folder to see files requested for that category



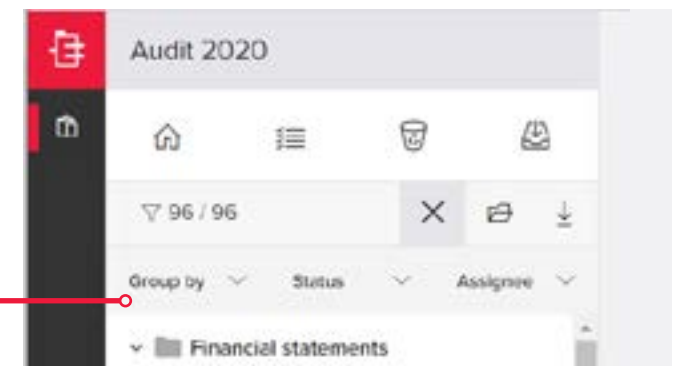
You can click the filter  icon to display filter fields.

You can click here to filter file requests (e.g. only display open requests)



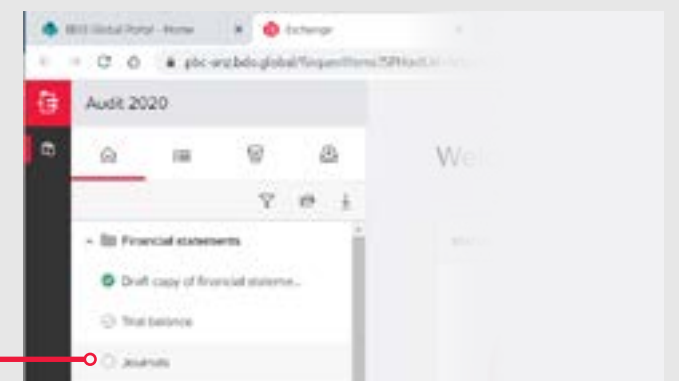
For example, you can filter to display only requests with Status Open.

Filter fields




To view details of a file request (the due date and status), and to upload and deliver the file request, click on the file name.

To provide the file to BDO, click on the name of the file requested



To assign a file request to a particular person in your organisation

If you want to assign a file request to a specific person (who has access to your BDO Global Portal):

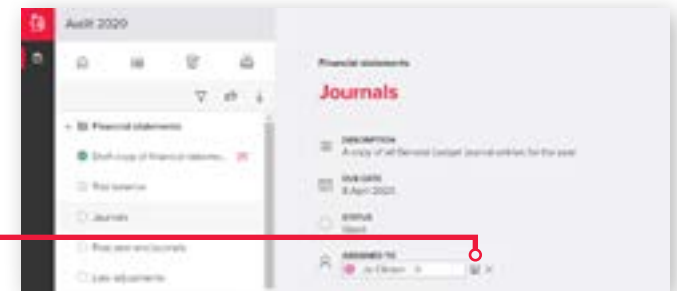
1. Click on the file request on the left of the Exchange window.
2. Click the Edit  icon on the right of the ASSIGNED TO field.

To assign the file request to a particular team member, click here



3. Select the person to assign the file request to, then click the Save  icon.

Select the person, then click the Save icon



To provide the requested file(s) to BDO

After clicking on the file request (name on the left), either drag & drop the files into the window or click Upload

Either drag & drop the file(s) into the window, or click Upload and navigate to and select the file(s)



When the files display in the window, click Deliver request (top right of the window).

To deliver the file(s) to BDO, click deliver request



After you click Deliver request, a tick will display on the left of the file request.

A tick on the left of the file name means the file has been delivered to BDO



File request icons

The icon on the left of a file request indicates the current status of the file request.

	BDO is waiting for you to provide the file
	You have uploaded the file and clicked Deliver request
	The file you delivered has been accepted by the BDO engagement team

How to add comments or rename or delete a file

If you click the dots on the right of a file, a menu will display that allows you to:

- ▶ Delete the file
- ▶ Add Comments to the file
- ▶ Rename the file

How to add a note or comments to a file request

You can add a note or comment to the request (different to adding a comment to a specific file).

Add notes to this request	Request notes can be used to provide further information about the request. Notes may be added by BDO or the client.	Type your note, then click Save note
Comments	It is intended that Comments be used as a way of satisfying a request by providing comments instead of files if files/documents are not required.	Type your comment, then click Send comment




To rename or delete the file, or to type comments about a file, click the dots on the right of the file

File drop

If BDO has requested you to provide specific files in a file request, please upload the files into the specific file request – by clicking on the file request on the left of the Exchange window, and then Upload the file(s).

If you want to provide BDO with multiple files or folders that don't relate to a specific file request, you can use the File drop area. BDO can access and move files from the File drop.


To open or close the File drop area, click the  icon (top of the file Exchange window).

Click here to open/close file drop (on the right)

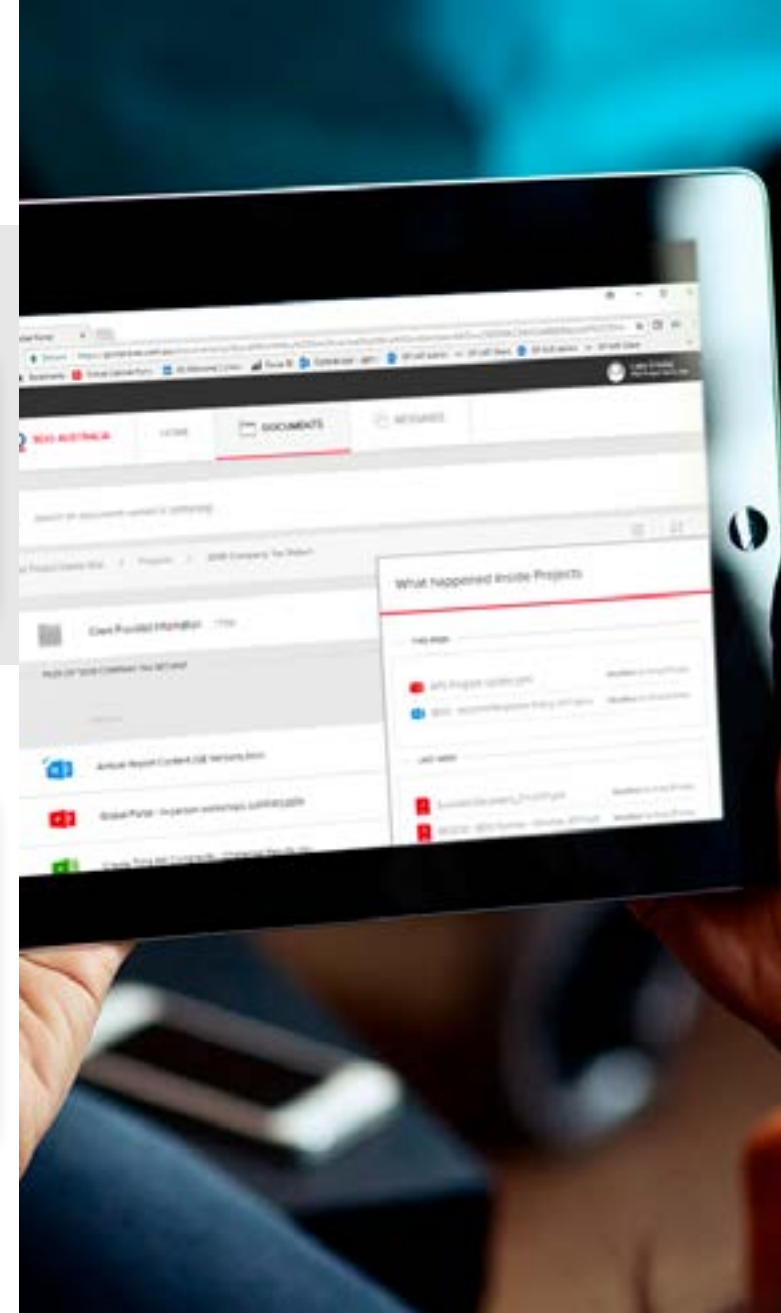
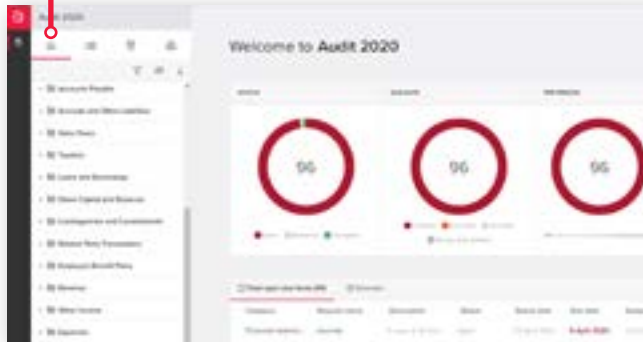


Drag & drop or click Upload to upload files or folders into the File drop area.

YOUR EXCHANGE DASHBOARD

To see a dashboard view of the status of items and tasks (for example tasks that are open, due soon, or overdue) and who the task is assigned to, click the Home  icon top left of your Exchange window.

Click the Home icon to view your dashboard



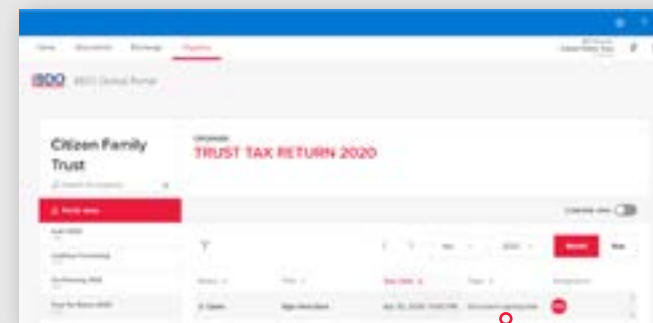
HOW TO SIGN DOCUMENTS USING DOCUSIGN

If BDO need you to sign a document, you will be sent an email notification. BDO uses the DocuSign digital signature system to sign documents electronically.

Documents assigned to you and awaiting your signature will display in the Organise area of your BDO Global Portal, under Portal tasks.

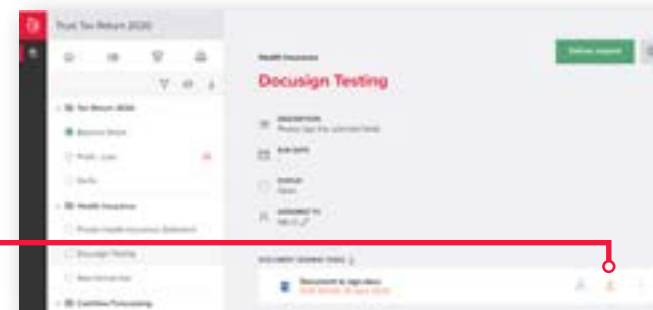
To sign a document:

1. Click Organise (top of the BDO Global Portal page, or on the Home page). If a Document signing task is assigned to you, the 'Assigned to' field will display You
2. Click on the Document signing task.



In Organiser, click on the Document signing task

Or you can access and sign the document from Exchange (example screenshot opposite).



In exchange, click here to sign the document

If this is the first time you are using DocuSign to sign a document, you will be required to tick the box (top left) to agree to use electronic records and signatures, and then click CONTINUE



- 3. If prompted, click CONTINUE
- 4. Read the document.



- 5. Click on the field(s) you are required to complete – for example Sign



If fields are not already placed on the document, drag & drop the fields you need to complete (for example, Signature and Date Signed) from the left onto the document.

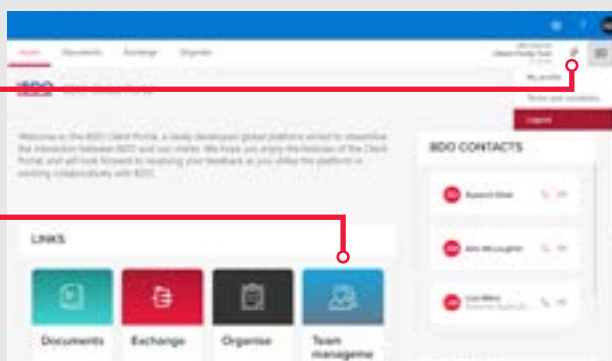
If this is the first time you are signing a document using DocuSign, when you click Sign you will be prompted to 'Adopt Your Signature'. You can either upload a scanned image file of your signature or draw your signature if you have a touch-screen device, or select a signature style from DocuSign. After selecting your signature, click ADOPT AND SIGN



- 6. After you have completed all required fields, click FINISH

You can access Team management by clicking here

To manage who in your team can access Projects in your BDO Global Portal, click Team management



HOW TO MANAGE TEAM MEMBERS (WHO CAN ACCESS YOUR PROJECTS IN THE BDO GLOBAL PORTAL)

If BDO has added you as a Client Admin user, you can manage who in your organisation has access to Projects in your BDO Global Portal as follows:

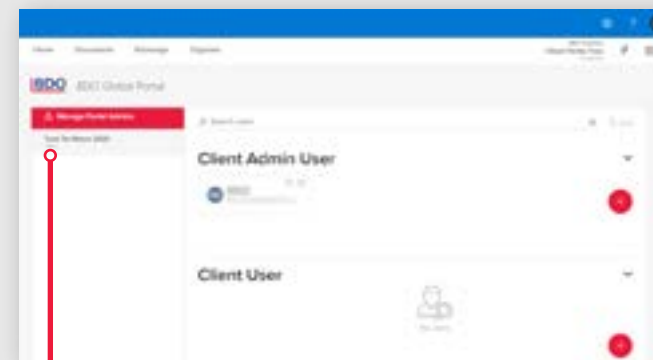
Click Team management on the BDO Global Portal Home page, or click the ⚡ icon top right of the BDO Global Portal window, then click Team Management.

Admin Users have access to all Projects in your BDO Global Portal.

BDO Admin Users have access to all Projects they are working on.

Client Admin Users have access to all Projects in your BDO Global Portal.


To add or manage users for a specific Project, click on the Project name (on the left).



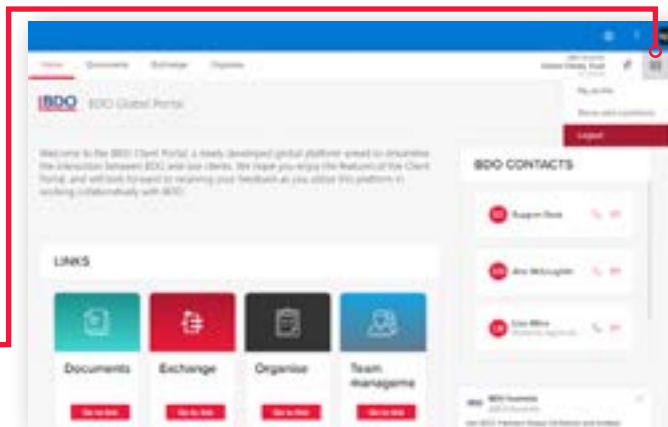
Click on the Project (on the left)

To add a new user to the Project, click here

HOW TO LOGOUT OF THE BDO GLOBAL PORTAL

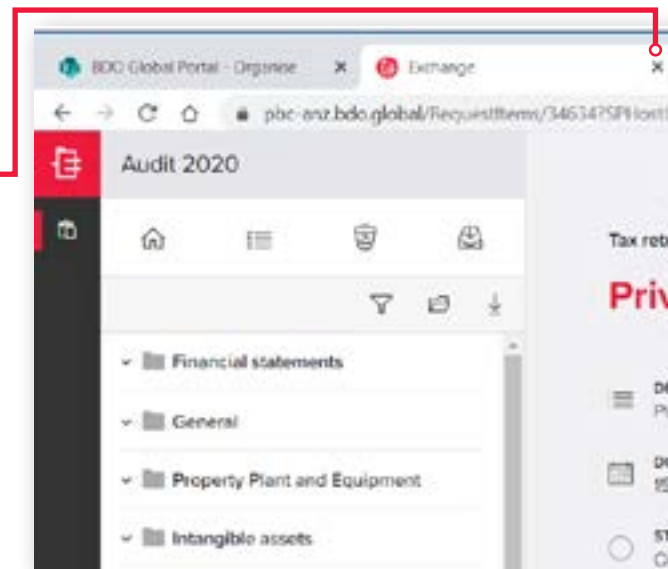
Click  top right of the window, then click Logout

The logout of the BDO Global Portal, click here then click Logout



To close Exchange, close the web browser tab

To close Exchange, close the web browser tab





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