

ENHANCING THE CUSTOMER EXPERIENCE

BDO's Global Portal

BDO'S GLOBAL CLIENT PORTAL IS AN INNOVATIVE PLATFORM THAT DIGITISES CLIENT ENGAGEMENTS WITH THE AIM OF IMPROVING EFFICIENCY AND ENHANCING YOUR EXPERIENCE. DEVELOPED IN COLLABORATION WITH MICROSOFT, THE PORTAL FORMS A SECURE SPACE FOR CLIENTS AND BDO TO SHARE INFORMATION AND MORE EASILY COLLABORATE.



WHAT ARE THE BENEFITS OF THE BDO GLOBAL CLIENT PORTAL?

The BDO Global Client Portal transforms and enhances your digital experience with your BDO advisers. Available 24/7, Portal enables you to access all services, apps and information and to collaborate with your advisers seamlessly through a flexible and secure environment.

By using the BDO Global Client Portal, we aim to improve the efficiency of our work with you. Because clear dates and timelines can be set, everyone will know exactly what's required for timely completion of a project. Email notifications and personal task assignment means no-one will forget when information is due.

Exceptional service and long-lasting client relationships are at the heart of BDO's approach, and the Portal will enhance the BDO client experience.

With more features being added on a regular basis, the BDO Global Client Portal allows BDO and its clients to stay ahead in this digital age.

WHAT FUNCTIONS ARE CURRENTLY AVAILABLE IN THE BDO CLIENT PORTAL?

We will create one Portal per client/entity, in which you can manage every engagement you have with BDO. Each Project (or piece of work) is then viewed and managed in separate folders within your Portal. Features include:



ONLINE COLLABORATION

- ▶ Upload information and documentation in one secure place. See at a glance outstanding information yet to be supplied to keep the work on track via the 'Exchange' tab
- ▶ Information that has ongoing value can be saved within a permanent space for future reference in the 'Documents' tab
- ▶ Track actions and milestones for BDO and client responsibilities.



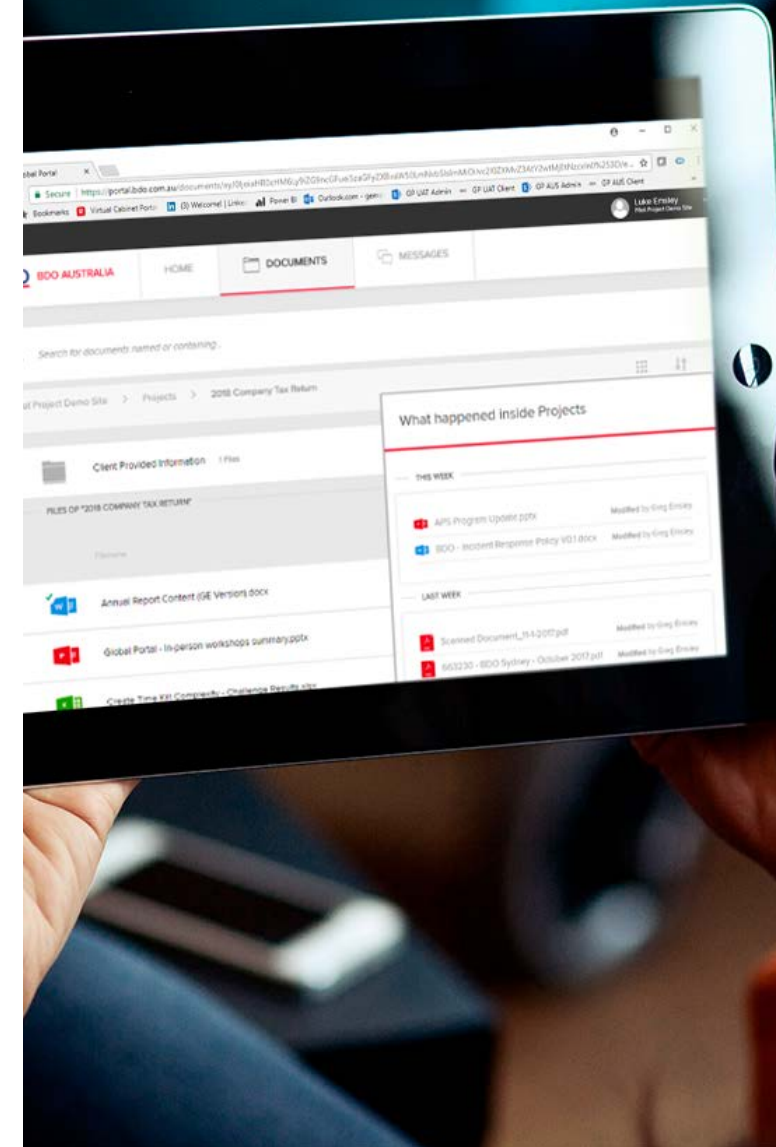
DIGITISED PAPERWORK AND WORKFLOW

- ▶ Approve and sign documents all within the Portal, allowing for better transparency and speedier project progress
- ▶ Set dates with calendar reminders for when BDO requires certain documentation or information to be uploaded or completed
- ▶ Assign tasks to specific users
- ▶ Portal supports multiple document types and views.



A FLEXIBLE, SECURE PLATFORM WITH LOCAL CUSTOMISATION

- ▶ Collaborate securely through features like multi-factor authentication, DocuSign, data storage encryption, secure document exchange and audit logging
- ▶ Security - permission and access can be set at a project level for different users such as your staff or our BDO teams
- ▶ You can receive a daily or weekly email digest, summarising all activity that has occurred on the Portal
- ▶ View document audit trails.





FUTURE FEATURES

BDO are constantly innovating and working on adding to our customer's experience. The following functions are currently being developed:



Chat

Ability to click on any of your BDO contacts listed within your Portal or Project and instantly contact them via chat functionality.



Mobile

Login to your BDO Global Client Portal from any of your devices, upload, review, sign and collaborate.



Organise

Whether you have one entity/business or a large group, you will be able to more easily move between the Portals for each and see aggregated 'rolled up' views of any outstanding tasks across all of your Portals via simple and interactive dashboards.



Push Notifications

Get out of your emails and see any important activity straight to your mobile as a notification.



SECURITY FAQs



Which users have BDO Client Portal access?



Only your BDO assigned team has access to information on your BDO Client Portal. This may vary from project to project depending on who is performing and managing each piece of work.



How is user access managed?



Your information can be segregated by the different jobs BDO does for you. This is done via the Portal folder structure. It means you decide which of your staff work on what jobs, and what information you allow them access to.



Will the uploaded files be backed up? Are the backed-up documents secured?



All information within your BDO Client Portal resides in Microsoft Azure, in one of their Australian data centres. All files are secured in the Australian Microsoft Azure Environment. Once BDO have acquired the relevant documents from you they will be saved to their secure internal document management system which is also backed up and removed from the Project when the piece of work is complete.



What are BDO's policies regarding files and data management after they are uploaded to the Portal?



The files and data that you provide will only be used for the specific engagement you have contracted us to undertake. The policies and procedures that govern the use of this information will fully comply with our Terms of Trade and Privacy Policies as they have been provided to you in preparation for our engagement.



BDO'S GLOBAL PORTAL IS A FLEXIBLE, SECURE PLATFORM DESIGNED TO ENHANCE YOUR EXPERIENCE WITH US.



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