

GETTING  
STARTED WITH

# GLOBAL PORTAL



IDEAS | PEOPLE | TRUST

**IBDO**

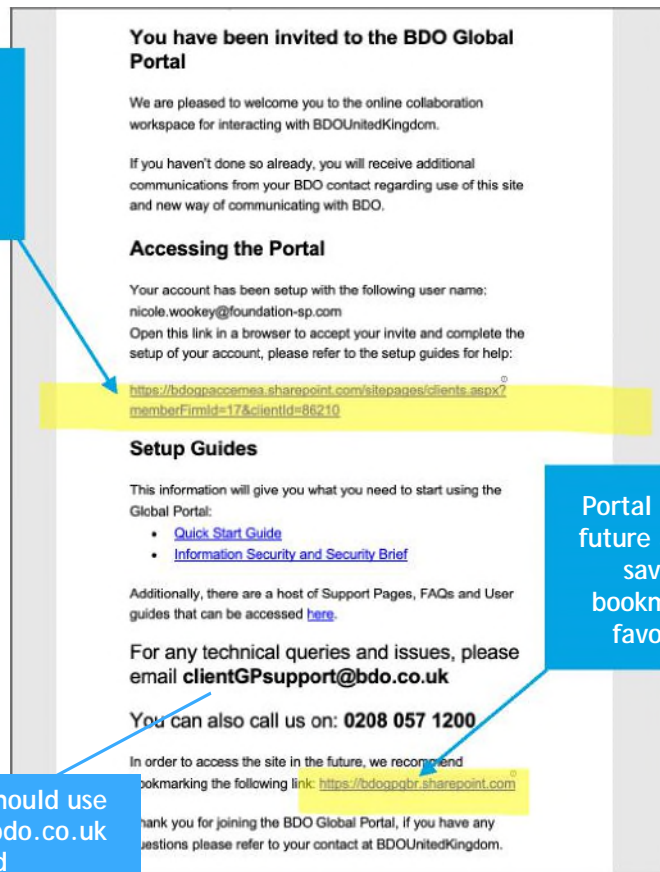


# BDO GLOBAL PORTAL

## GETTING STARTED

### STEP 1 - SIGNING IN

When you are invited to a portal, you receive an email (check your junk folder!) containing the following information:



Invitation Link to access the portal on first login

Portal URL for future access - save as bookmark or favourite

Audited entities should use auditGPsupport@bdo.co.uk for queries instead

You can open the invitation link in any of the supported browsers below. If, when you open the link, it shows you an email address that **isn't** the one that was invited to the portal, we recommend opening the link in **Guest mode** or **In Private/ Incognito mode** in your browser - click your browser below for guidance on this.



Sign in using **the email address that was used to receive the portal invitation email:**

If it is a **Microsoft work or school account**, the password will be the same one you use to access other services on your network (such as logging into Windows, accessing emails etc.)

If using a **non-Microsoft account (e.g. Gmail)**, you will need to link your personal email with a one-time passcode.



You will also be asked to review terms & conditions, and for permission for BDO to access information - click **Accept**.



# BDO GLOBAL PORTAL

## GETTING STARTED

### STEP 2 - MULTI-FACTOR AUTHENTICATION

Global Portal uses Multi-Factor Authentication (MFA) to ensure the security of all data within it, and you are required to use it whenever you access your portal.

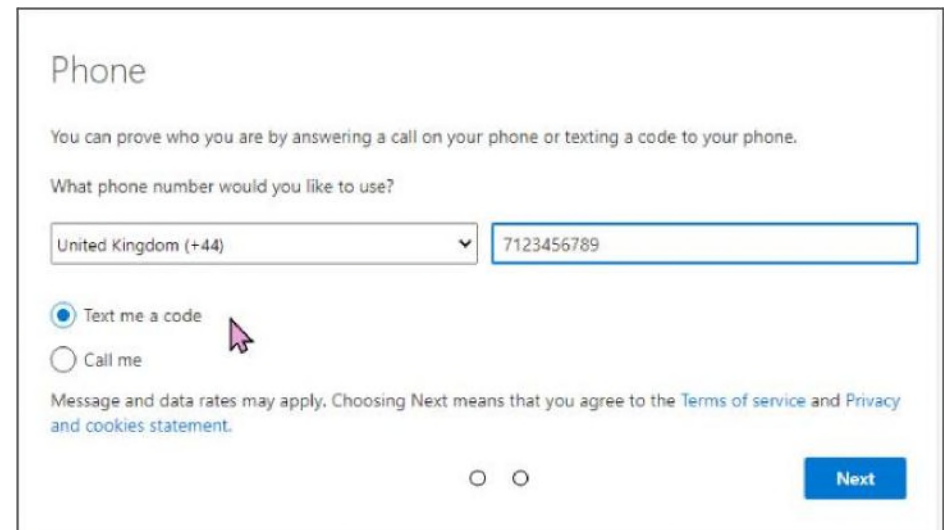


If you choose to use the Authenticator App, please be sure to install the **official Microsoft** app. Please **do not delete the app** once installed as you will use this each time you access the portal.

Then, follow the prompts on the screen to setup the Microsoft Authenticator App as your chosen MFA method.

If you would rather use a text message as your MFA method, select **I want to set up a different method**.

On the next screen, enter your phone number, choose to receive a text message, and then follow the prompts on screen to authenticate your phone number.



If your phone number changes, please contact either the **Global Portal Support team** (see footer) or your **BDO Adviser** to reset it.

# BDO GLOBAL PORTAL

## GETTING STARTED



### STEP 3 – WELCOME WIZARD

When accessing Global Portal for the first time, you will see the **Welcome Wizard** to set your personal settings, including notification preferences, which apply to all the portals you have access to. This can be amended later in your personal settings by clicking on your **picture/initials** in the top right corner of the portal home page and selecting **Personal settings**.

You can adjust your notification and email preferences to ensure you receive the right level of updates and emails from any important updates.

Step 2

## NOTIFICATION PREFERENCES

To stay notified about all changes that are made within the BDO Global Portal we have notifications in BDO Global Portal. You can switch on or off topics that you want to get notified about.

**Project provisioning**

Project provisioning ⓘ

**Portal & project management**

Project archival ⓘ

Project deletion ⓘ

Page activation ⓘ

Prospect project ⓘ

**Team management**

Users added/removed ⓘ

**Document management**

Files added/removed ⓘ

Files made read-only ⓘ

APT export status ⓘ

**Tasks and Exchange Next Gen**

Task assigned ⓘ

Task unassigned ⓘ

Task status change ⓘ

Task overdue ⓘ

New comments ⓘ

previous **Skip**

Step 3

## EMAIL PREFERENCES

Select the email frequency and topics that you would like to be notified about, from Followed tasks in Global Portal.

Summary email frequency ⓘ

Summary email is based on the notifications preferences

Daily List (Recommended) ▾

Follow email settings ⓘ

Follow

Select follow topics and the frequency of receiving them

Follow topics	Instant email	Daily email
<input checked="" type="checkbox"/> Task status change ⓘ	<input checked="" type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Task overdue ⓘ	<input type="radio"/>	<input checked="" type="radio"/>
<input checked="" type="checkbox"/> New comments ⓘ	<input checked="" type="radio"/>	<input type="radio"/>

previous **Let's get started**



We recommend that you toggle all notifications to **on** and toggle email settings to **follow** with **instant email** for task status changes in order to be kept fully informed of the progress of document uploads and tasks.

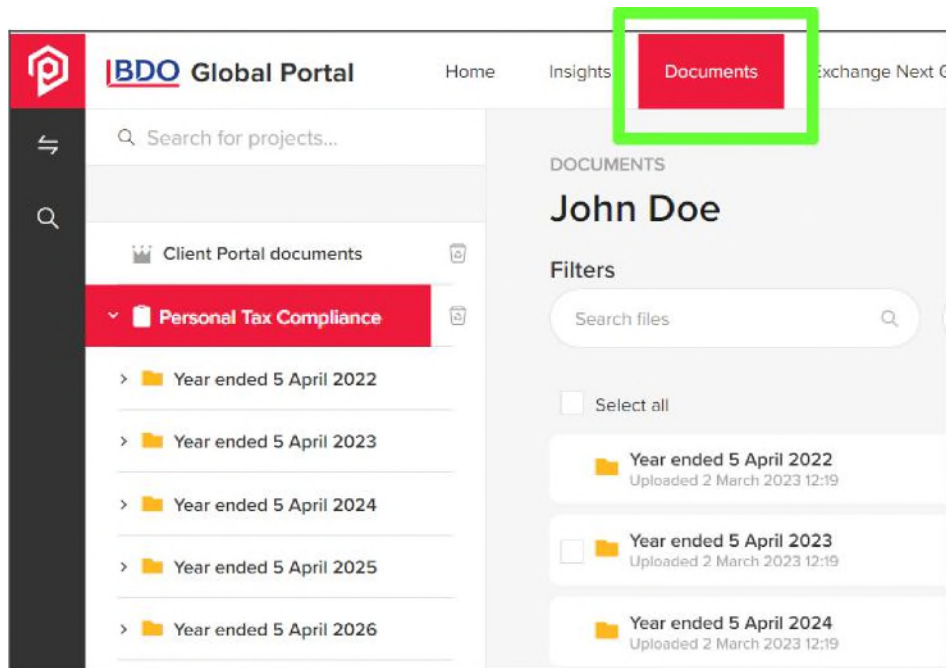
# BDO GLOBAL PORTAL

## GETTING STARTED



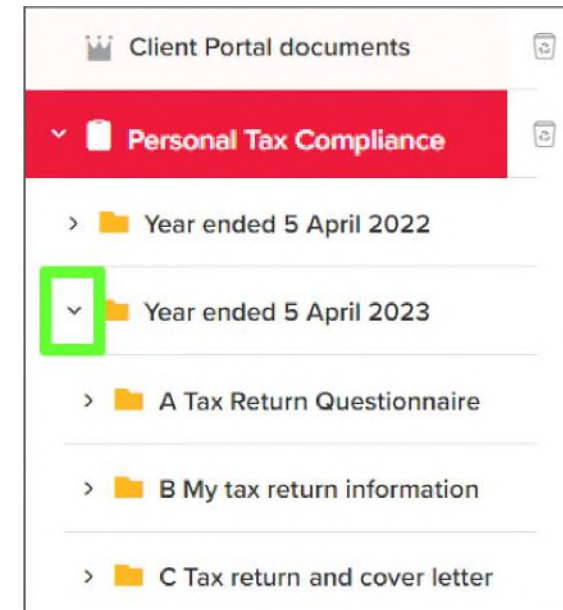
### STEP 4 - UPLOADING DOCUMENTS PT.1

You can access the document library for your portal by clicking on the **Documents** tab at the top of the screen.



If the list of folders in the left pane is not expanded, click the **>** icon next to the portal name on the left to see all available folders.

In this example, the **Year ended 5 April 2023** section holds relevant folders for the 2023 tax return period - click the **>** icon to expand the list.



You will find your Tax Return Questionnaire in the **Tax Return Questionnaire subfolder**, and you can upload your tax return information into the **My tax return information subfolder**.

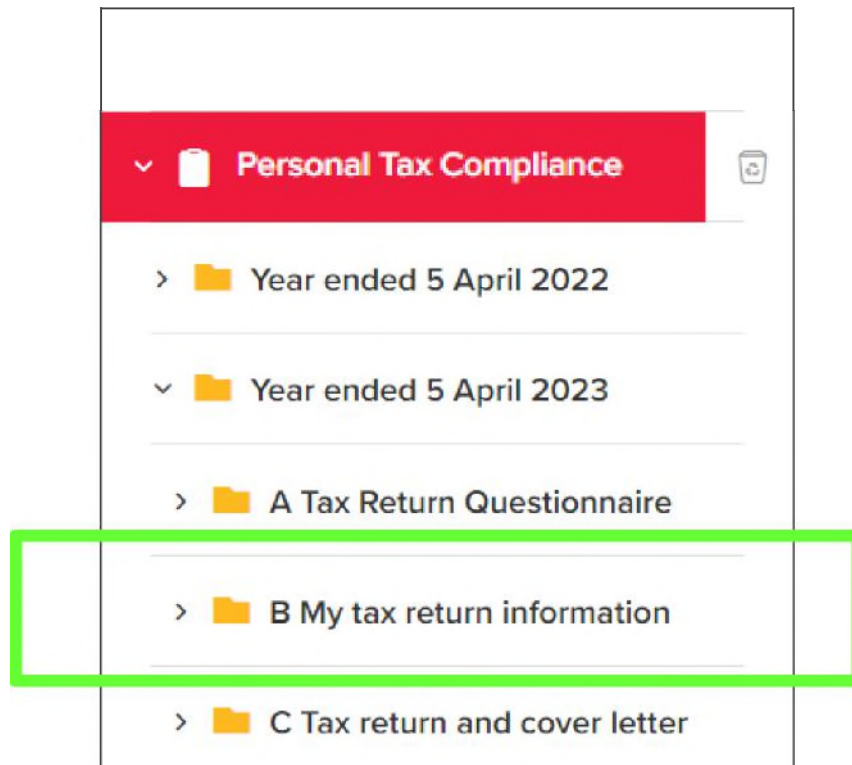
# BDO GLOBAL PORTAL

## GETTING STARTED

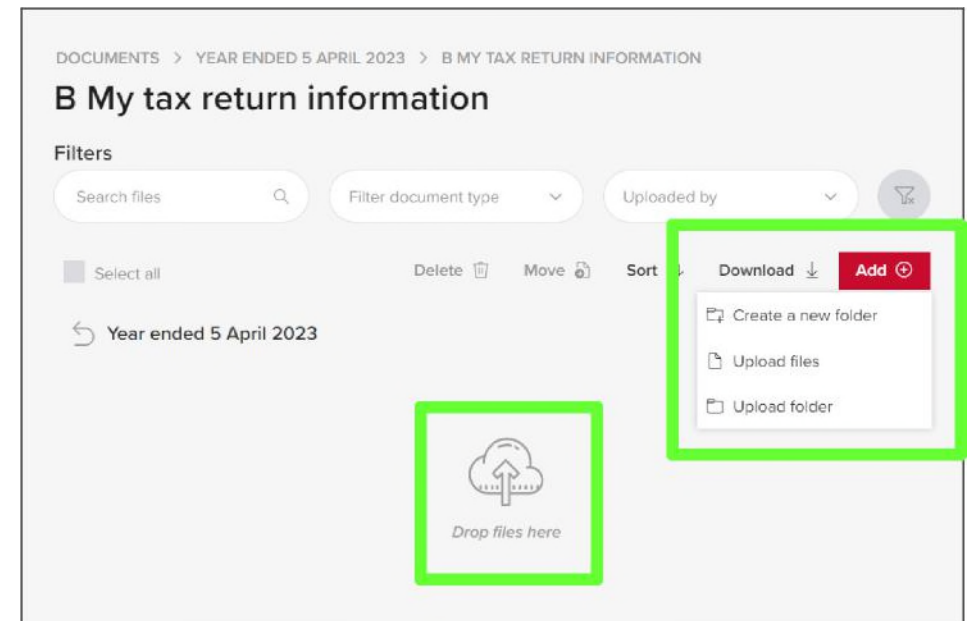


### STEP 4 - UPLOADING DOCUMENTS PT.2

To upload files or folders to your tax return information area, select **B My tax return information** from the left side menu.



Simply click on the **Add** button at the right-hand side of the toolbar in the documents section and select **Upload files** - or simply **drag and drop** your files into the documents area.



Once your files have been uploaded, **your BDO Adviser will be notified** that you have provided your information and it's available to review immediately.

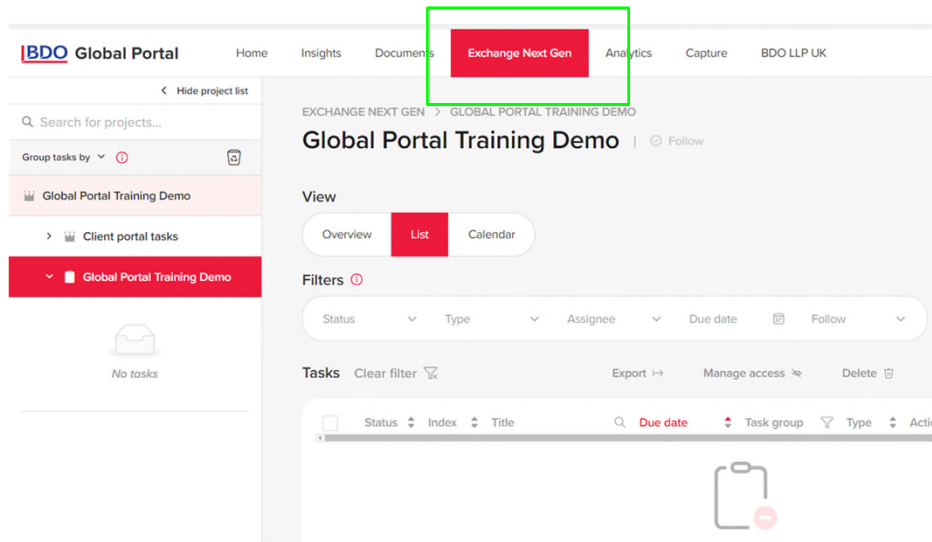
# BDO GLOBAL PORTAL

## GETTING STARTED



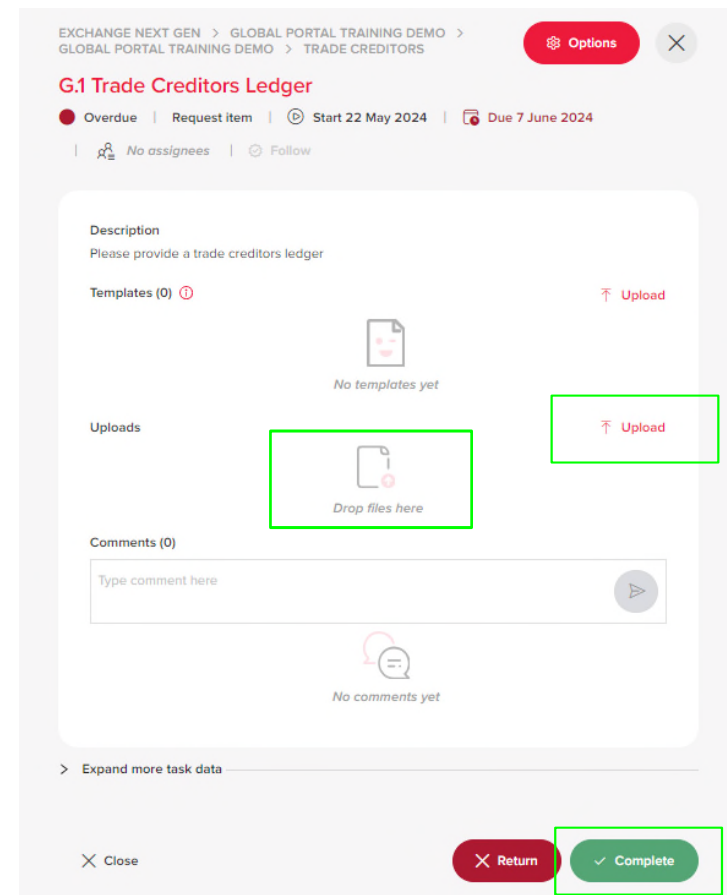
### STEP 5 - RESPONDING TO TASKS

You can access all the tasks relating to a project from the 'Exchange Next Gen' tab at the top of the screen.



Tasks can be managed and viewed from the overview screen, as a list or as a calendar view and filters can be applied to help you find relevant tasks. **Click** on the task to respond to it.

Once in a task, documents can be uploaded by **drag and drop** or by clicking on the **upload** button. Comments can also be added if required. Then **click complete** to submit, and your BDO Adviser will be notified.





# BDO GLOBAL PORTAL

## GETTING STARTED

### HELP & RESOURCES

If you encounter any issues when using Global Portal, you can contact support via:



Call for Support on  
0208 057 1200



[Global Portal  
Support Email](#)

The Global Portal Support team are available **Monday-Friday 9am-5pm**, with **email** support queries being answered **within 4 working hours**.

If you have any questions regarding where to find documents in Global Portal, or where to upload your documents, please contact your **BDO Adviser**.





This publication has been carefully prepared, but it has been written in general terms and should be seen as containing broad statements only. This publication should not be used or relied upon to cover specific situations and you should not act, or refrain from acting, upon the information contained in this publication without obtaining specific professional advice. Please contact BDO LLP to discuss these matters in the context of your particular circumstances. BDO LLP, its partners, employees and agents do not accept or assume any responsibility or duty of care in respect of any use of or reliance on this publication, and will deny any liability for any loss arising from any action taken or not taken or decision made by anyone in reliance on this publication or any part of it. Any use of this publication or reliance on it for any purpose or in any context is therefore at your own risk, without any right of recourse against BDO LLP or any of its partners, employees or agents.

BDO LLP, a UK limited liability partnership registered in England and Wales under number OC305127, is a member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms. A list of members' names is open to inspection at our registered office, 55 Baker Street, London W1U 7EU. BDO LLP is authorised and regulated by the Financial Conduct Authority to conduct investment business.

BDO is the brand name of the BDO network and for each of the BDO member firms.

BDO Northern Ireland, a partnership formed in and under the laws of Northern Ireland, is licensed to operate within the international BDO network of independent member firms.

Copyright © June 2024 BDO LLP. All rights reserved. Published in the UK.

[www.bdo.co.uk](http://www.bdo.co.uk)