A decorative graphic on the right side of the page consists of several vertical lines of varying thicknesses in red and grey, some of which are slightly curved. Interspersed among these lines are clusters of small dots, also in red and grey, arranged in a pattern that suggests movement or data points.

BDO Global Portal Quick Start Guide

BDO Global Portal Quick Start Guide

Welcome to the BDO Global Portal! The new BDO Global Portal is an online digital collaboration platform for BDO professionals to efficiently engage with their clients. It acts as a central, secure location where all engagement material and associated files can be stored, exchanged and worked on by both clients and their BDO advisers.

Getting Started

You will receive an email notification indicating that you have been invited to the Portal. Didn't receive an email? You can still access the Portal by logging in using your Microsoft account. [Click on the link to log in.](#)

If you have a Microsoft Account - You will use the same login as you would for your business (such as Outlook) since the Portal is based on Microsoft SharePoint (Note: BDO does not have access to your password for your Microsoft account).

If you use a Gmail/Hotmail/Yahoo account - you will be provided with a unique username ending in "ext.bdo.ca". When logging in for the first time, you will be asked to create your own unique password. Please be sure to use the username containing "ext.bdo.ca" when subsequently logging into the portal.

The Portal

Adding a user

If you would like to add someone from your company or organization to the Portal as an Admin, click on the Lightning Bolt Icon and select "Team management".

Then click on Portal Admin Management. Admin users have the ability to add or remove users.

To add someone with access to a specific project (such as the Year End), under Team management you can select the project you wish to add the user. Click the Plus sign and enter their email.

Accessing your documents

Click on the Documents Tab to find your corporate or personal documents such as financial statements, tax

returns or letters from BDO. Looking to upload your year-end or personal tax documents? See the section on Exchange.

Email notifications

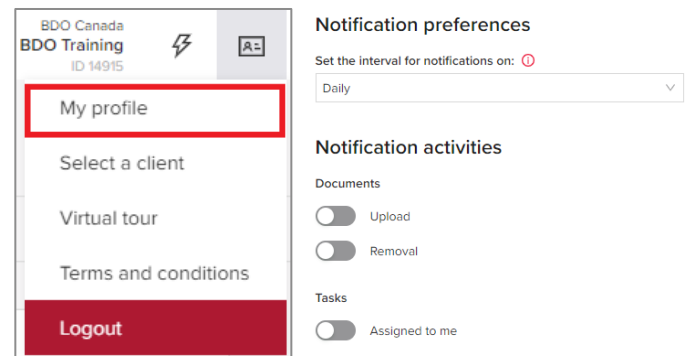
If you would like to be notified when documents have been uploaded to the Portal, click on the Person icon and select "My profile".

Scroll to the bottom to set your notification preferences. You can adjust the frequency and toggle which notifications you would like to receive (Don't forget to press Save).

Daily - A daily summary of documents uploaded and tasks edited, sent at the end of each business day.

Weekly - A weekly summary of documents uploaded and tasks edited, sent every Friday.

Real-Time - Email notifications in real-time as events happen.



How do Projects Work?

Projects can be used for all of your services such as audit, year-end services, taxes, bookkeeping, or advisory services. Your BDO advisor will set up a project based on your needs. For example, for year-end work they will set up a "Year End 20XX" project. Your BDO advisor can set a project as "Confidential", meaning only those invited to that project can see it. This can be used to restrict access to certain employees at your office, or to certain family members.



Exchange

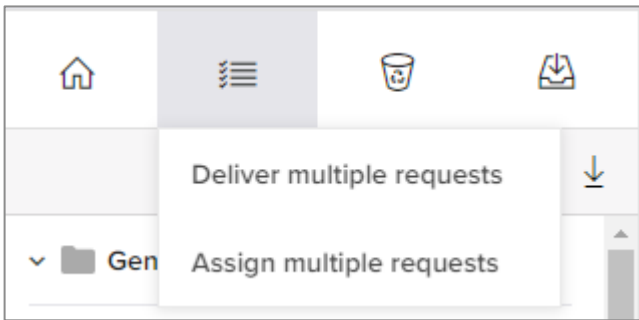
Want to send in your year-end information? Click on the "Exchange" button to open the Exchange app. Here your advisor has outlined all the documents they need from you as tasks. Adding your documents is as easy as opening a

request and using drag-and-drop to copy the documents from your computer.

You can also use the File Drop icon to upload multiple documents and then assign them to tasks later.

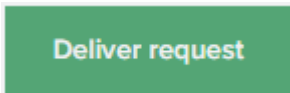
The landing page for Exchange allows you to see what documents have been assigned, and how many have been completed. You can filter documents based on Assigned To, Status, and Due Date.

Need to assign tasks to your staff? Click on the List icon and select “Assign Multiple Requests”.



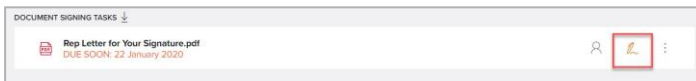
Click on the tasks you wish to assign and then select from a list of users to assign to.

Make sure to select “Deliver request” after you have uploaded the documents. You can also use the “Deliver multiple requests feature”.



DocuSign

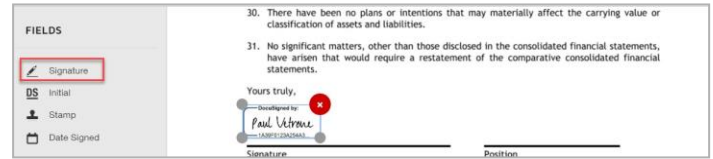
BDO has integrated DocuSign in the Portal to allow you to sign items for BDO wherever you are! You’ll know an item requires your signature when you see a Pen icon next to a document that has been assigned to you.



No need for a new login or password. DocuSign is linked with the Portal using the same login information.

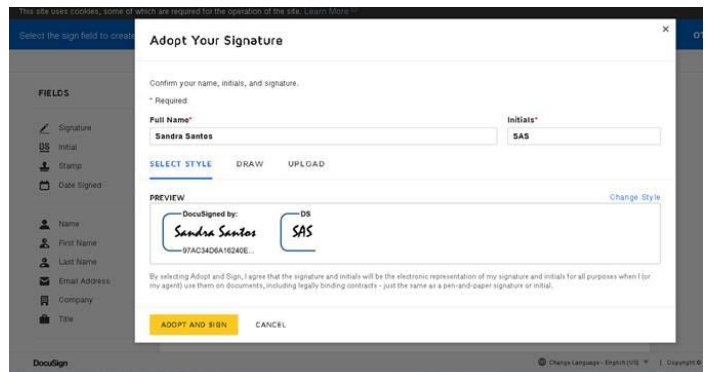
When you click on the document, it should ask you to sign off on it (a green box should appear). Steps are as follows to set up:

1. When you click the green box, it will bring you to the DocuSign page where you have to accept the terms and conditions as a first time user.
2. Once you click on Continue, it will generate a generic ID sign off stamp (top left corner of each page).



(continued)...

3. Next, click under Fields in the left hand side of the window, on the Signature (pen) Icon.
4. An orange “Sign here” box opens up that you drop onto the page where you want to sign off (anywhere on the first page is acceptable, you can drag it around before saving). That would then insert your signature stamp (you can change the style, draw it in or upload an actual signature if you have one in PDF already on your computer).
5. Click Adopt and Sign. It adds the image of the signature to the document with the ID stamp.
6. Click on Finish at the top once you have added your signature. You will then return to the Portal.



Questions?

Reach out to your BDO Advisor if you have any issues with the Portal. Not sure who that is? Navigate to the Home page and contact anyone under the “Contact BDO” section.

System requirements

We recommend using the following modern browsers:



- Google Chrome
- Microsoft Edge
- Safari
- Mozilla Firefox

Internet Explorer (IE) is not supported.



Troubleshooting

If on login, you received the following error message:



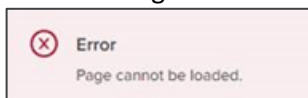
Resolution:

1. Ensure that the email address in the error matches the email address you received your invitation email with **OR**
The email address of the BDO managed identity username@ext.bdo.ca which was provided in your invitation email

If a different email address is present in the error, use the provided link below the error to log into the account with the correct email address.
2. If the email address matches, please report this to your BDO representative.

If you experience one of the following access issues:

- The following error message is displayed on login:



- The Documents folder and/or Exchange is empty: or

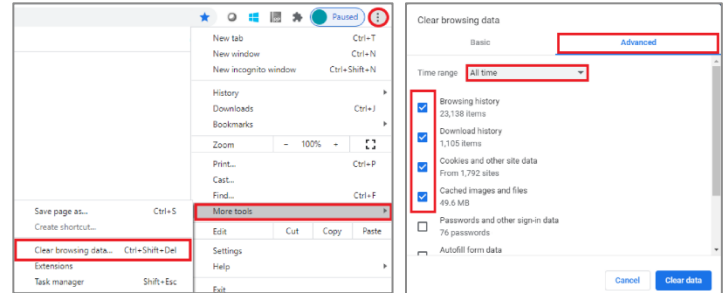


- You cannot access a project you are assigned to.

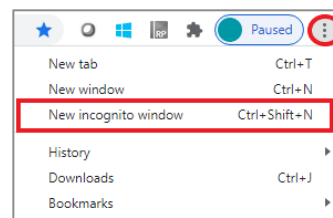
Please follow these steps:

(The instructions may vary from browser to browser. Please use the internet or browser help to find the steps appropriate for your browser).

1. Clear browsing data/cache and refresh the portal.



2. Open portal.bdo.ca in a new incognito/in private window.



** Note - if using Google Chrome follow step 3.

3. Add login.microsoftonline.com to list of Allowed Cookies/Cookies Exception (as applicable to the browser) and refresh the portal.
 - a) Click on the three dots on top right corner of Chrome -> Settings -> Privacy and Security -> Cookies and other site data.
 - b) In 'Site that can always have cookies' click 'add' and add login.microsoftonline.com.