BDO Global Portal Quick Start Guide

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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 advisors.

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 use you email address as your username. On each login attempt a one-time access code will be sent to your email.

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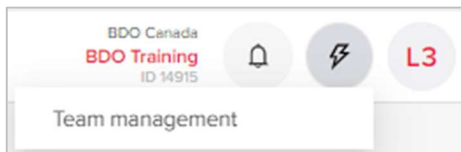
Then click on Portal Admin Management. Admin users have the ability to add or remove users.

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 initials icon and select "Personal settings".

Select "Nonfiction 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.
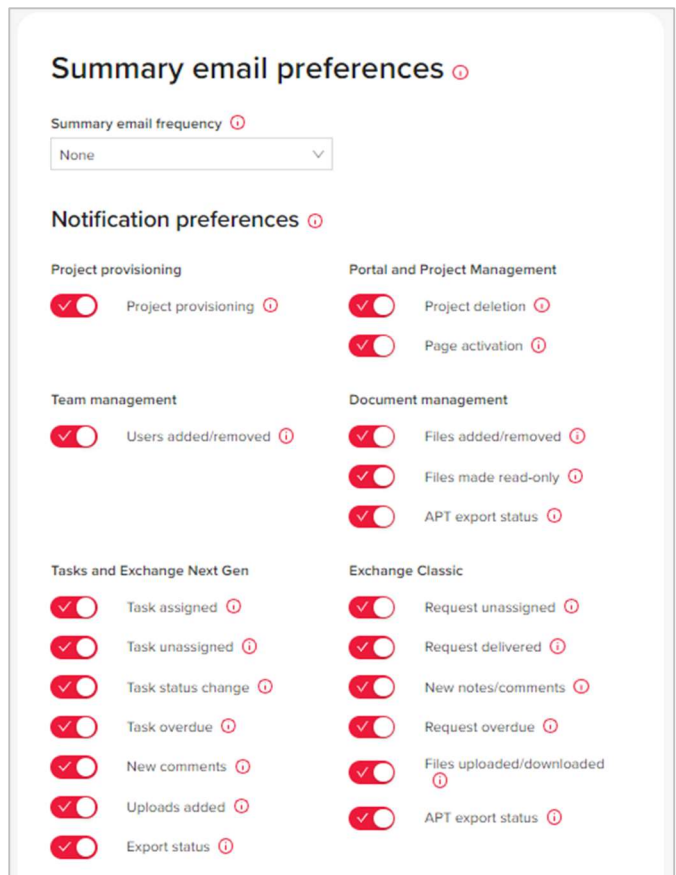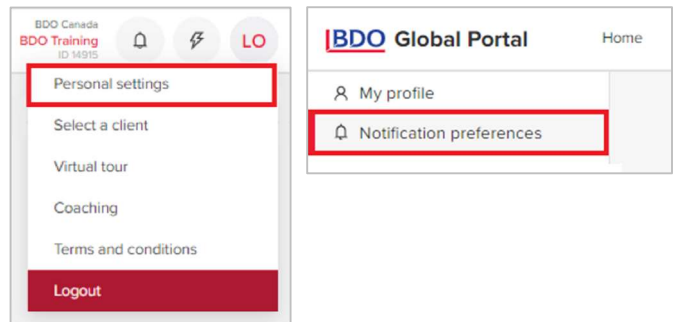
How do Projects Work?

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 Next Gen

Want to send in your year-end information? Click on the "Exchange Next Gen" 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.

The landing page for Exchange Next Gen 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? Go to the List view, select the tasks you want to edit and select the "Edit" button.
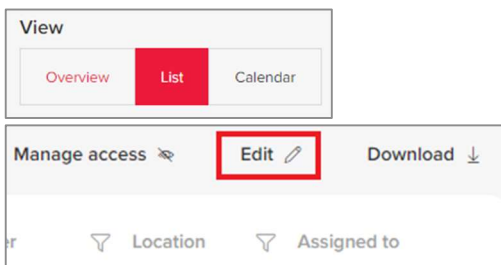
Click on the tasks you wish to assign and then select from a list of users to assign to.

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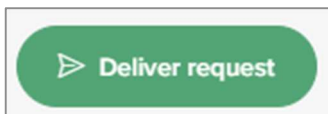
DocuSign

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.
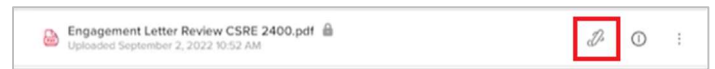

When you click on the document, it should ask you to sign off on it (a green box should appear). Steps are as follows to set up:

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)…
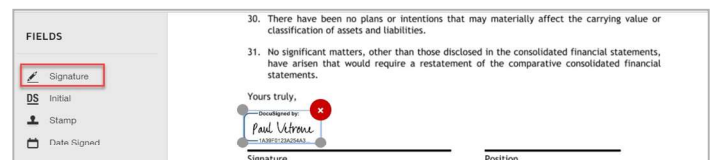
3. Next, click under Fields in the left hand side of the window, on the Signature (pen) Icon.
4. An orange "Sign here" box opens up that you drop onto the page where you want to sign off (anywhere on the first page is acceptable, you can drag it around before saving). That would then insert your signature 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.
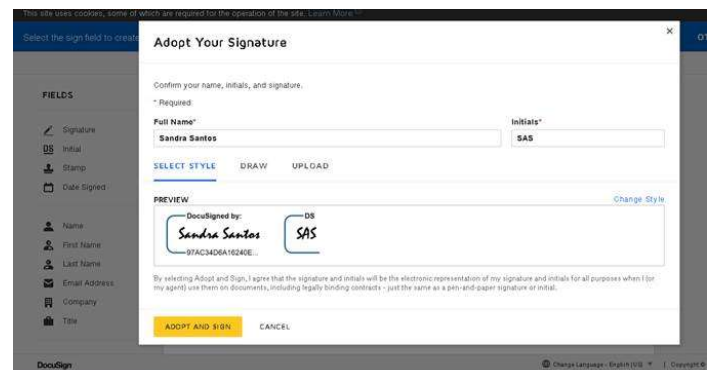
Questions?

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 provided to the BDO representative and the email address you received your invitation.
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:
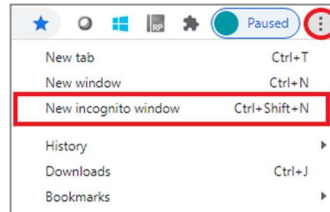

- The Documents folder and/or Exchange is empty:

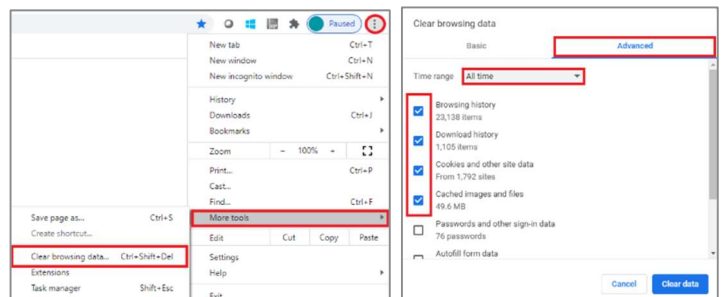- You cannot access a project you are assigned to.

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. Open portal.bdo.ca in a new incognito window.

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

3. If the two steps above do not work, please 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 date.
   b) Make sure 'Allow all cookies' is checked and if not please check mark it.
   c) In 'Site that can always have cookies' click 'add' and add login.microsoftonline.com .

Need technical support?

If you need technical support please complete the assistance form here and a member of BDO's IT team will assist you.

If you would like to speak with a member of our IT team, please call the support number below.

1-888-236-0009

Client Support Hours:
8:30 AM to 07:00 PM ET
Monday – Friday