



Global Portal



BDO

GETTING STARTED FOR CLIENT USERS

LOG IN TO YOUR PORTAL ANYTIME VIA [PORTAL.BDO.GLOBAL](https://portal.bdo.global)

Welcome to Global Portal, your **online digital collaboration platform** with BDO. It acts as a central, secure location for us to efficiently **engage with each other**, where all engagement material and associated files can be stored, exchanged, and **worked on by both you and your BDO advisers**.

INVITATION EMAIL

You can access Global Portal only after you have been invited by your BDO contact.

Global Portal sends emails from the following address: No-reply@portal.bdo.global Please add this email address to your safe recipients list. When you sign in for the first time, you will have to accept the terms of use.

LOGIN

Your username is your business email address. Your password will be the same as your Microsoft account (e.g. work Outlook email) password.

If you do not have a Microsoft account, follow the on-screen instructions to complete the set-up process.

MULTI-FACTOR AUTHENTICATION (MFA)

MFA is a digital security method enabled in some locations. During login, you may be prompted to authenticate using your registered device. This can involve entering a code from your Authenticator App, receiving a text message, or a phone call.

DID NOT RECEIVE OR LOST YOUR INVITATION EMAIL?

Visit portal.bdo.global and sign in via the menu on the top of the page.

KEY AREAS OF GLOBAL PORTAL ARE:

Documents

Upload documents so you can collaborate on them with your BDO team.

Tasks

Monitor your engagement and deliver requested items.

DOCUMENTS

Documents is a location within Global Portal for users to share and collaborate on files together.

Add documents and folders

Documents and folders can be uploaded to a specific Project location of Global Portal, using either the drag-and-drop action or the Add+ button. You can add both single and multiple documents.

TASKS

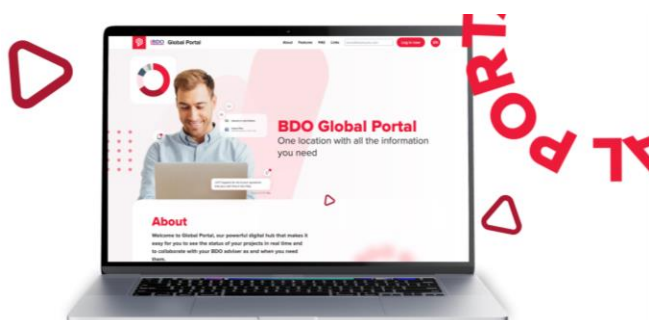
Click **Tasks** on the main navigation menu to manage and deliver tasks in your portal.

The **Tasks** page provides a secure place to upload your documents combined with interactive dashboards to monitor any deliverables you and your team still need to provide.

NOTIFICATIONS AND EMAIL SETTINGS

Manage your personal preferences on notifications and emails you receive via the menu under your **Profile photo circle** icon.

You can receive daily summary emails or turn on the **Follow** toggle to receive instant email notifications for every status change on tasks you choose to monitor.



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

[1-888-236-0009](tel:1-888-236-0009)

Client Support Hours:

8:30 AM to 7:00 PM ET

Monday – Friday