GETTING
STARTED WITH

GLOBAL PORTAL

IDEAS | PEOPLE | TRUST

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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

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.**
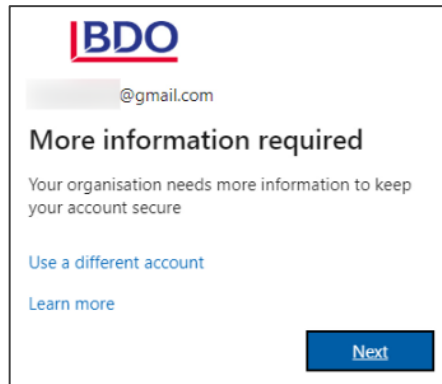
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STEP 2 – MULTI-FACTOR AUTHENTICATION

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.

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_____@gmail.com

More information required

Your organisation needs more information to keep your account secure

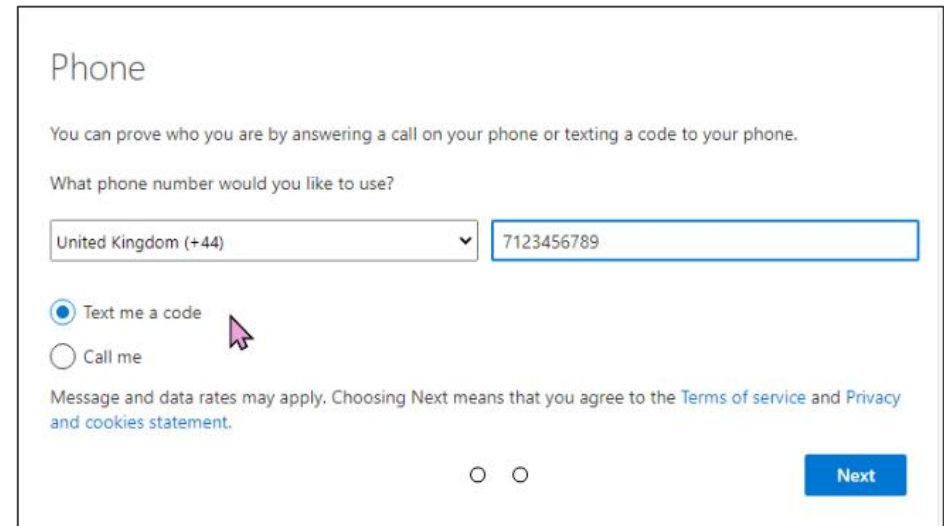Use a different account

Learn more

Next

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.

Phone

You can prove who you are by answering a call on your phone or texting a code to your phone.

What phone number would you like to use?

United Kingdom (+44)   7123456789

○ Text me a code

○ Call me

Message and data rates may apply. Choosing Next means that you agree to the Terms of service and Privacy and cookies statement.

○ ○   Next

If your phone number changes, please contact either the **Global Portal Support team** (see footer) or your **BDO Adviser** to reset it.
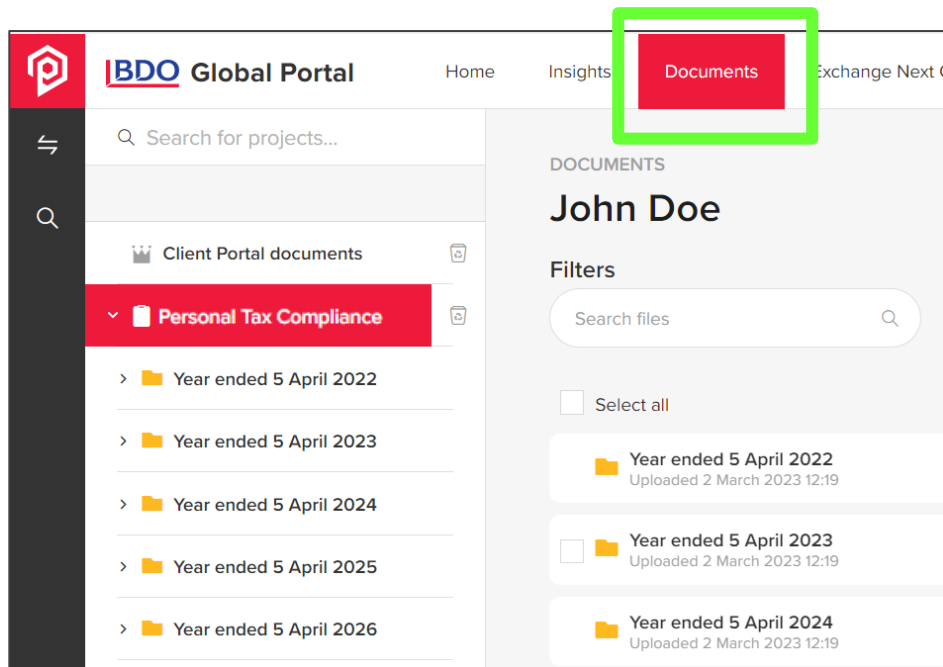
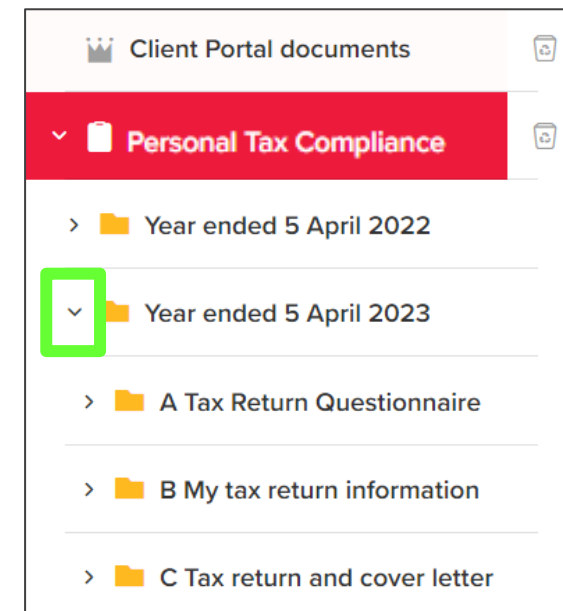# BDO GLOBAL PORTAL
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STEP 3 – UPLOADING DOCUMENTS PT.1

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**.

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STEP 3 – 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.
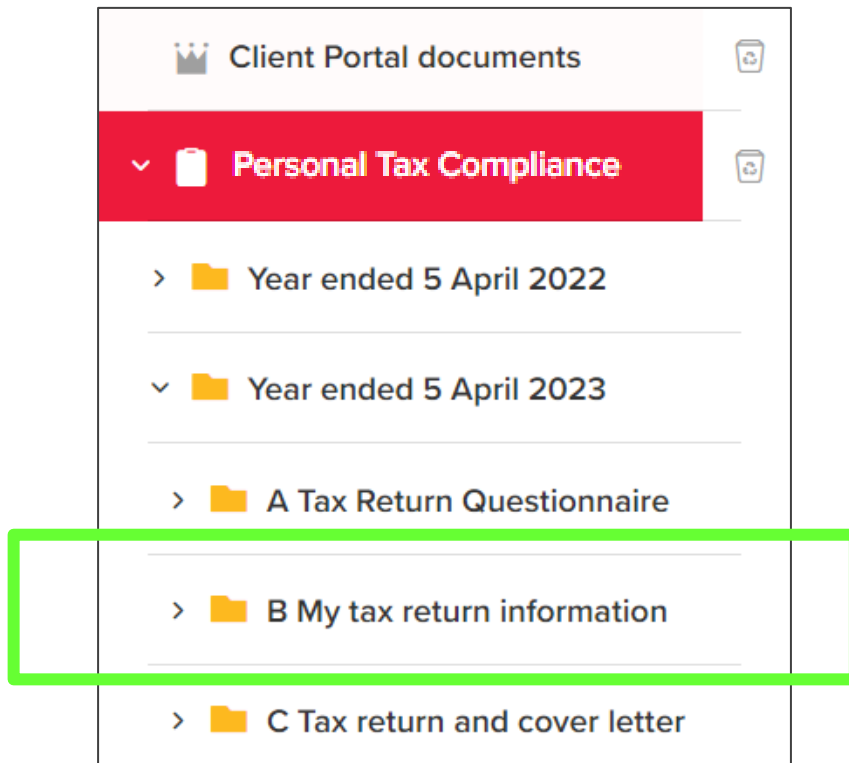
Simply click on the **Add button** at the right-hand side of the toolbar in the documents section and select **Upload files –** or simply drag **and drop** your files into the documents area.
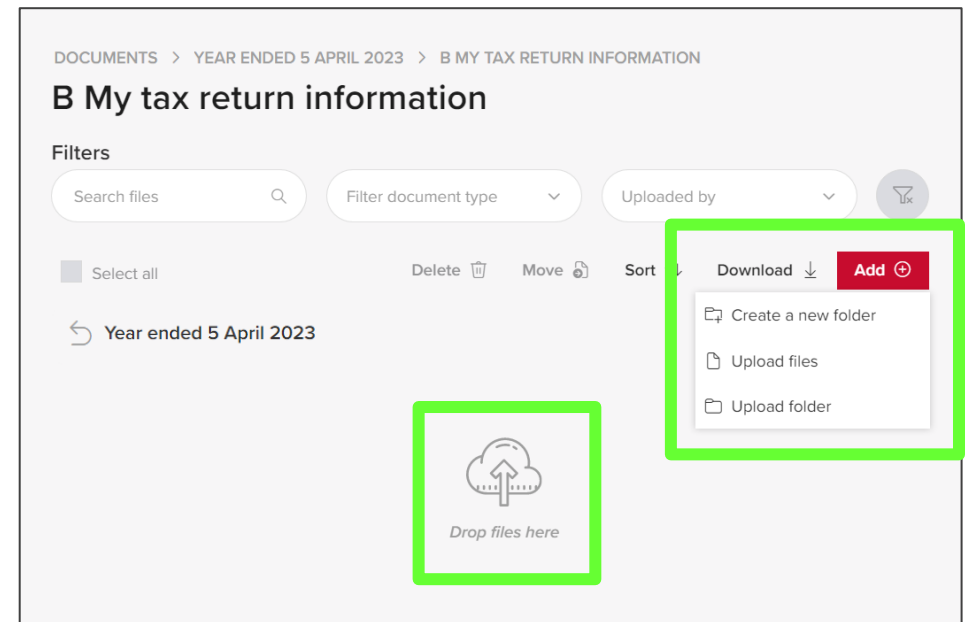
Once your files have been uploaded, **your BDO Adviser will be notified** that you have provided your information and it's available to review immediately.

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STEP 4 – NOTIFICATIONS

To be notified when documents have been uploaded to the Portal, click on your **picture/initials** in the top right corner of the portal home page and select **Personal settings**.
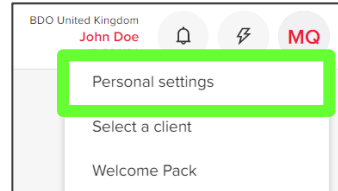
Then, select **Notification preferences** on the left-hand side of the page to set your preferences. You can adjust the frequency of summary emails and toggle which notifications you would like to receive (Don't forget to press **Save**).
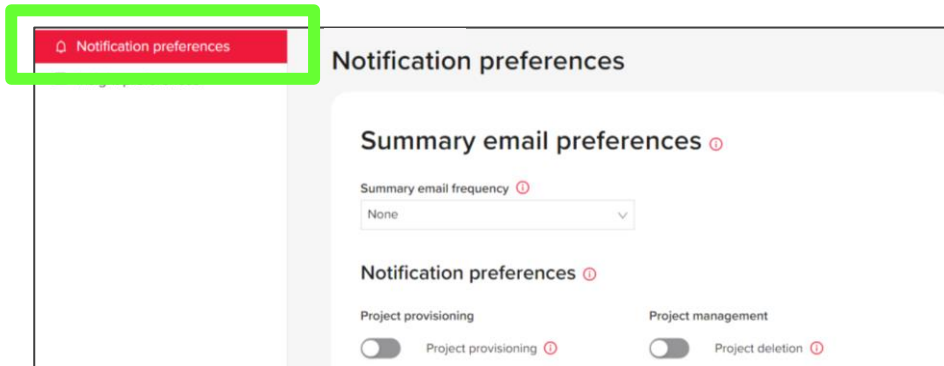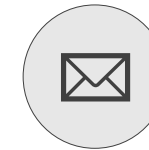
! We recommend that you toggle all notifications to **on** and switch the frequency to **Daily** in order to be kept fully informed of the progress of document uploads and tasks.

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**.

www.bdo.co.uk