

GETTING
STARTED WITH

GLOBAL PORTAL



IDEAS | PEOPLE | TRUST

BDO



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:

You have been invited to the BDO Global Portal

We are pleased to welcome you to the online collaboration workspace for interacting with BDOUnitedKingdom.

If you haven't done so already, you will receive additional communications from your BDO contact regarding use of this site and new way of communicating with BDO.

Accessing the Portal

Your account has been setup with the following user name:
nicole.wookee@foundation-sp.com

Open this link in a browser to accept your invite and complete the setup of your account, please refer to the setup guides for help:

<https://bdogpaccemea.sharepoint.com/sitepages/clients.aspx?memberFirmId=17&clientId=86210>

Setup Guides

This information will give you what you need to start using the Global Portal:

- [Quick Start Guide](#)
- [Information Security and Security Brief](#)

Additionally, there are a host of Support Pages, FAQs and User guides that can be accessed [here](#).

For any technical queries and issues, please email clientGPSupport@bdo.co.uk

You can also call us on: **0208 057 1200**

In order to access the site in the future, we recommend bookmarking the following link: <https://bdogpqr.sharepoint.com>

Thank you for joining the BDO Global Portal, if you have any questions please refer to your contact at BDOUnitedKingdom.

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.

Enter code

We just sent a code to [redacted] @gmail.com

Enter code

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

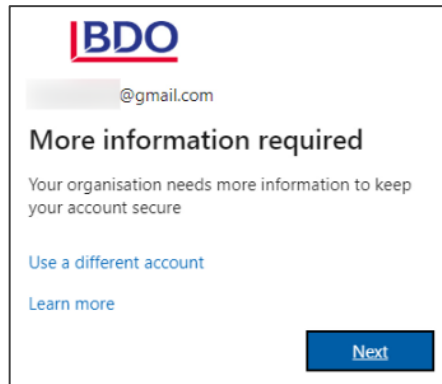


BDO GLOBAL PORTAL

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.

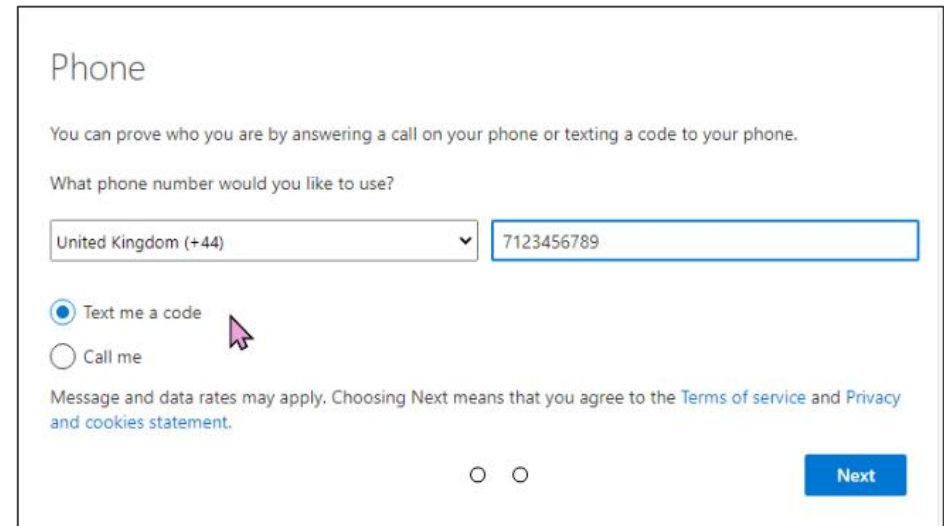


If you choose to use the Authenticator App, please be sure to install the **official Microsoft** app. Please **do not delete the app** once installed as you will use this each time you access the portal.

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.

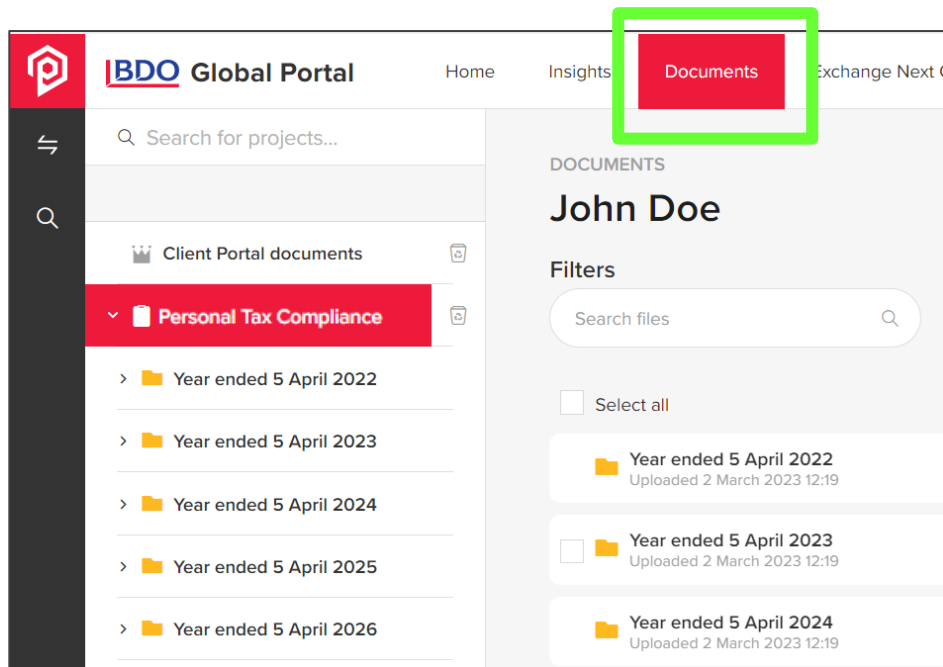
BDO GLOBAL PORTAL

GETTING STARTED



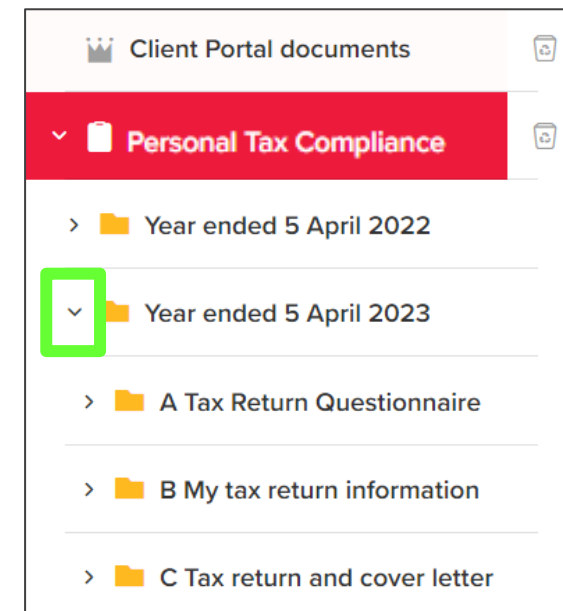
STEP 3 - UPLOADING DOCUMENTS PT.1

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**.

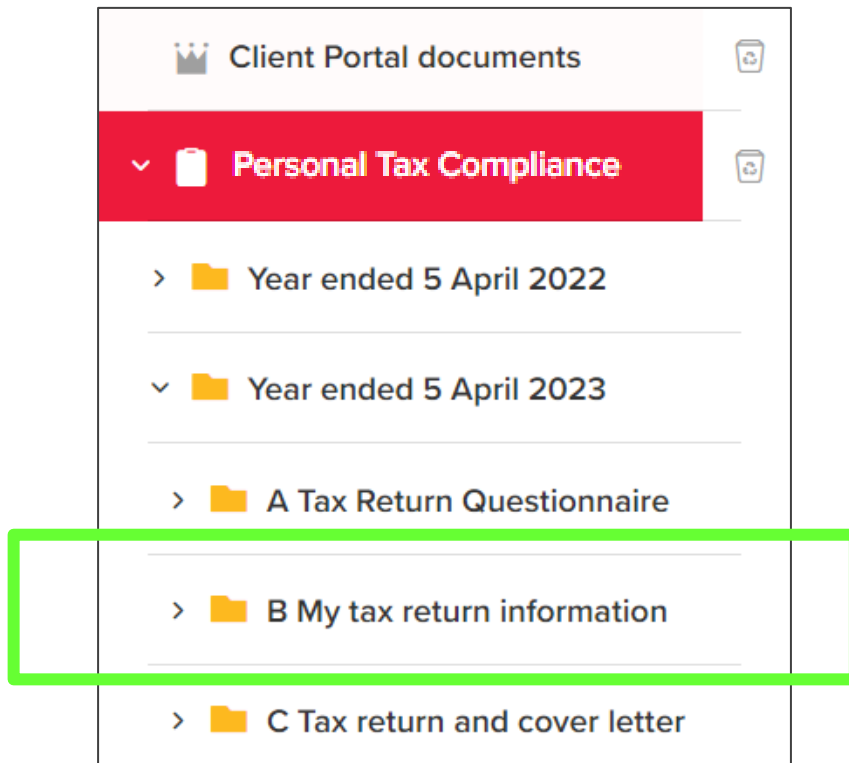
BDO GLOBAL PORTAL

GETTING STARTED

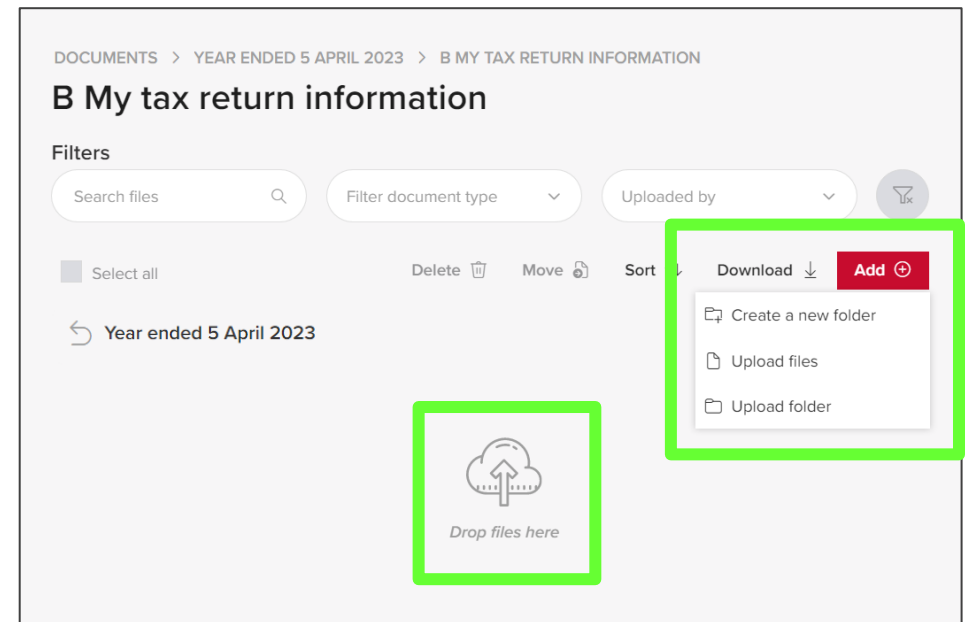


STEP 3 - UPLOADING DOCUMENTS PT.2

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.

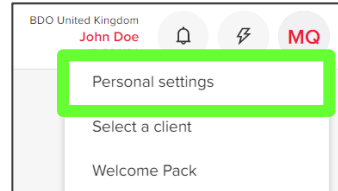
BDO GLOBAL PORTAL

GETTING STARTED

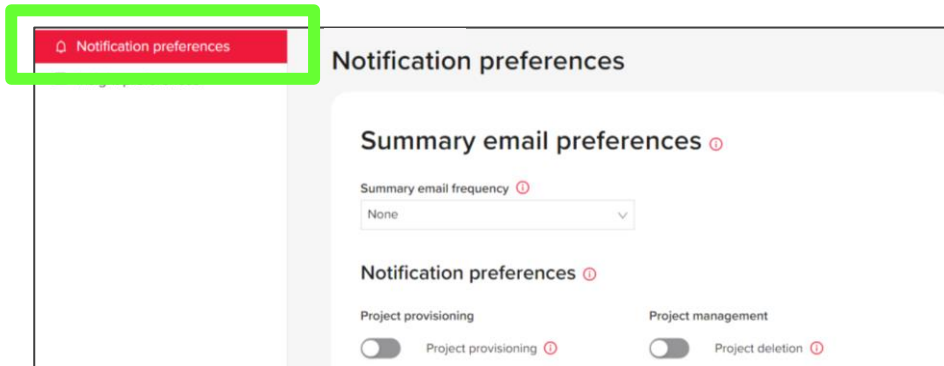


STEP 4 - NOTIFICATIONS

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**).



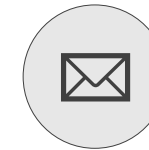
! We recommend that you toggle all notifications to **on** and switch the frequency to **Daily** in order to be kept fully informed of the progress of document uploads and tasks.

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**.



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

www.bdo.co.uk

