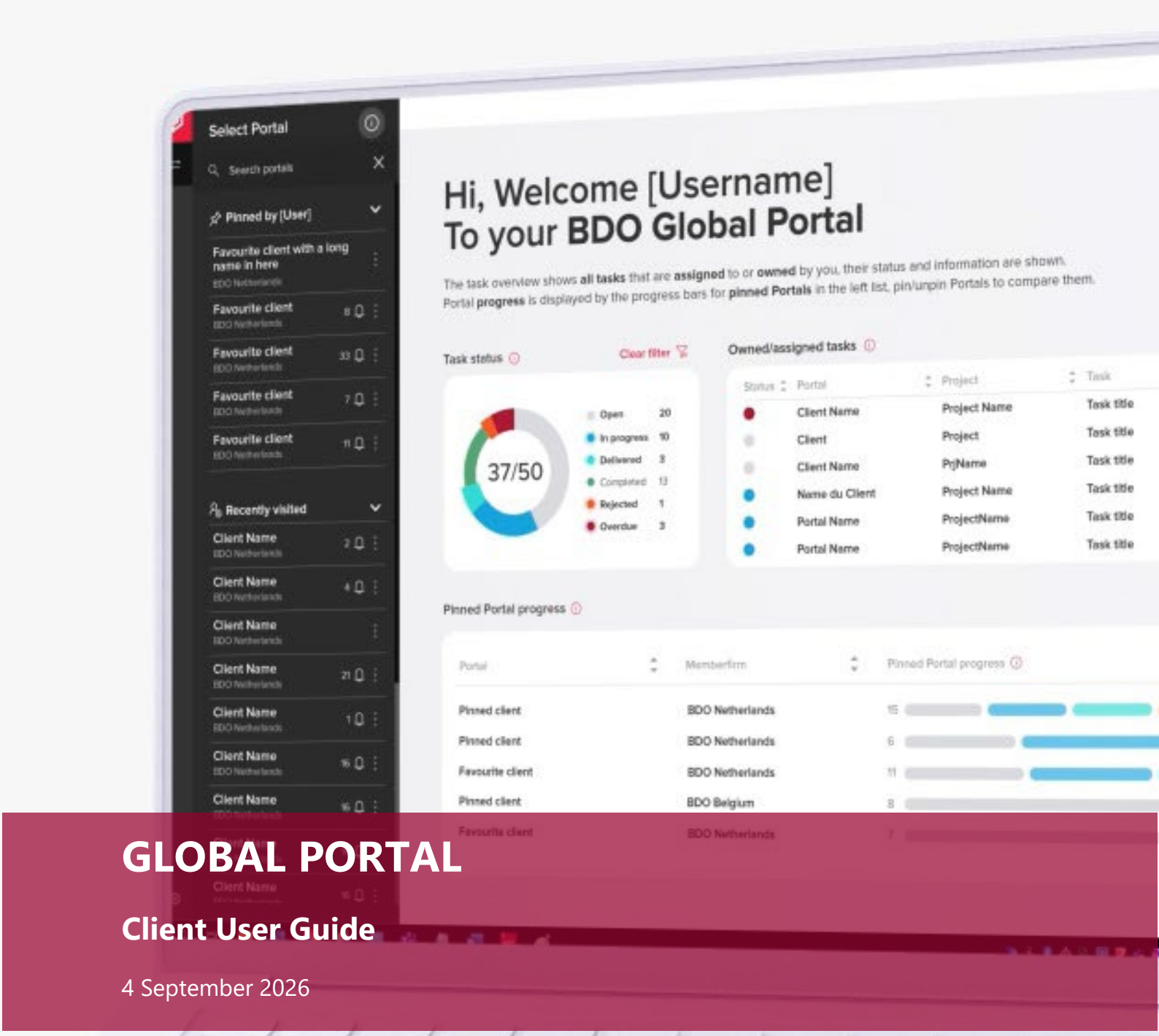


GLOBAL PORTAL

Client User Guide

4 September 2026

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DOCUMENT DETAILS

VERSION MANAGEMENT

Version	Date	Author	Nature of amendment
3.0	April 2025	Maria Peicheva	Updated document based on Release 5.8. Exchange Next Gen replaced with Tasks. Updated screenshots.
3.1	June 2025	Evenika Mandrijauske	Updated document based on Release 5.10. Updated views in Tasks.
3.2	August 2025	Evenika Mandrijauske	Updated document based on Release 5.11. Updates to Tasks interface options and task types Signing/Approval task, new "Client request" task type.
3.3	November 2025	Evenika Mandrijauske	Updated document based on Release 5.12. Updated screenshots with new icons.
3.4	January 2026	Justas Leščinskas	Updated document based on Release 5.13. Updated various screenshots/texts.
3.5	September 2026	Maria Peicheva	Added a note on SMS/voice retirement for MFA (1 Feb 2027) and added recommendation to register a passkey or Microsoft Authenticator.

REVIEWER

Name	Version	Date
Kornelija Samardokaite	3.0	17 April 2025
Maria Peicheva	3.1	23 June 2025
Maria Peicheva	3.2	27 August 2025
Maria Peicheva	3.3	14 November 2025
Maria Peicheva	3.4	18 February 2026

INTENDED AUDIENCE

Target Audience
BDO Clients

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1. ABOUT GLOBAL PORTAL

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 collateral can be stored and worked on by both clients and their BDO advisers. It is a key interface for BDO's digital client experience.

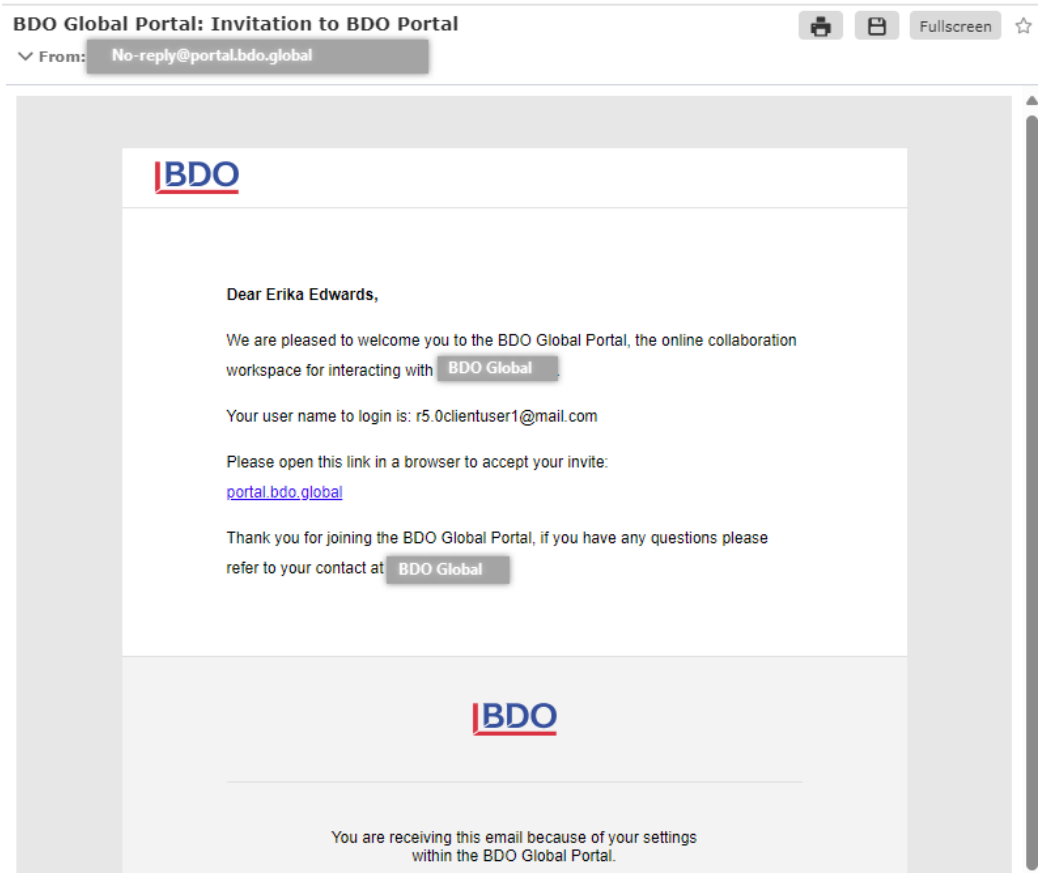
By working in partnership with Microsoft, an online collaboration space has been developed that allows BDO advisers and their clients to embark on a truly digital relationship that can last for a client's entire lifetime with BDO.

2. PORTAL LOGIN

2.1 Login via an email invitation

If you are a new user, you can access Global Portal only after you have been invited by your BDO contact. You will receive an email invitation which you need to accept to be able to log in to Global Portal. A sample email is provided in the below screenshot.

Please note: Global Portal sends emails for notifications on projects where you are added. The email address these notifications are coming from is: **No-reply@portal.bdo.global**. Please add this email address to your safe recipients list.



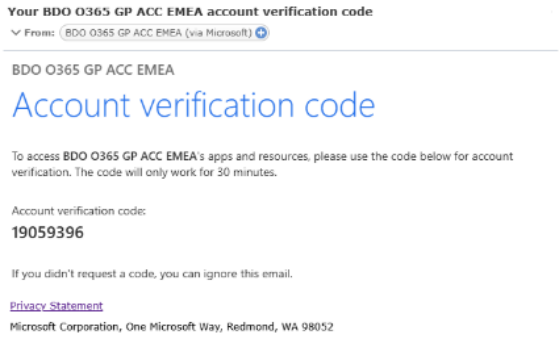
To accept the invitation, click the **portal.bdo.global** link in the invitation email and type in your email address in the authentication window.

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- If you are using a Microsoft account, enter your email and password.
- If you have a non-federated account such as Gmail, Hotmail, etc., the login process requires a one-time password (OTP). This one-time password (or "account verification code") is sent to your email and you need to use it to log in. A new verification code is generated on every visit to Global Portal.



See an example of a one-time password email:



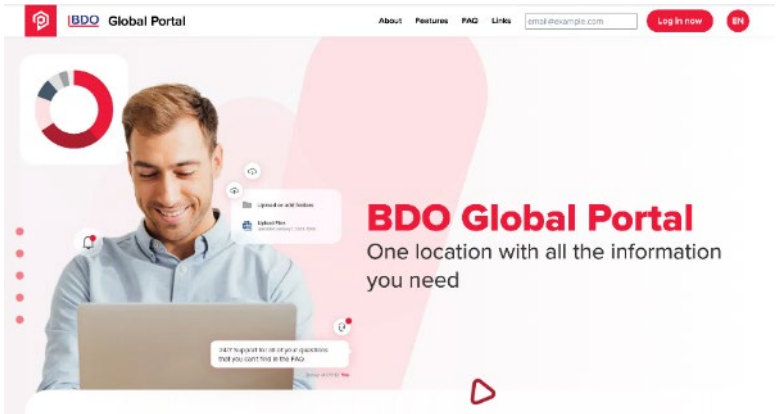
- If Multi-factor authentication (MFA) is enabled, you need to complete additional authentication steps, such as entering a code from your Authenticator App (Microsoft Authenticator recommended).

Note: Multi-Factor Authentication (MFA) is a digital security method enabled in some locations: you will be prompted during login to authenticate using your registered method. In some cases, you can be requested to complete MFA twice. This occurs when your account has its own MFA settings activated. This is the expected behaviour so please continue to log in as usual. If you want to review or change your account's MFA settings, visit Microsoft's secure page https://aka.ms/mysecurityinfo. Please reach out to your BDO contact, if you need further assistance with MFA.

2.2 Recommendation: Prepare for upcoming Microsoft authentication changes

Microsoft will retire **SMS and voice verification methods** for MFA from **1 February 2027**. To maintain access to Global Portal, register a phishing-resistant authentication method, such as a **passkey**, or add **Microsoft Authenticator** as an alternative verification method. Read more at aka.ms/passkeybydefault

2.3 Login via the global landing page



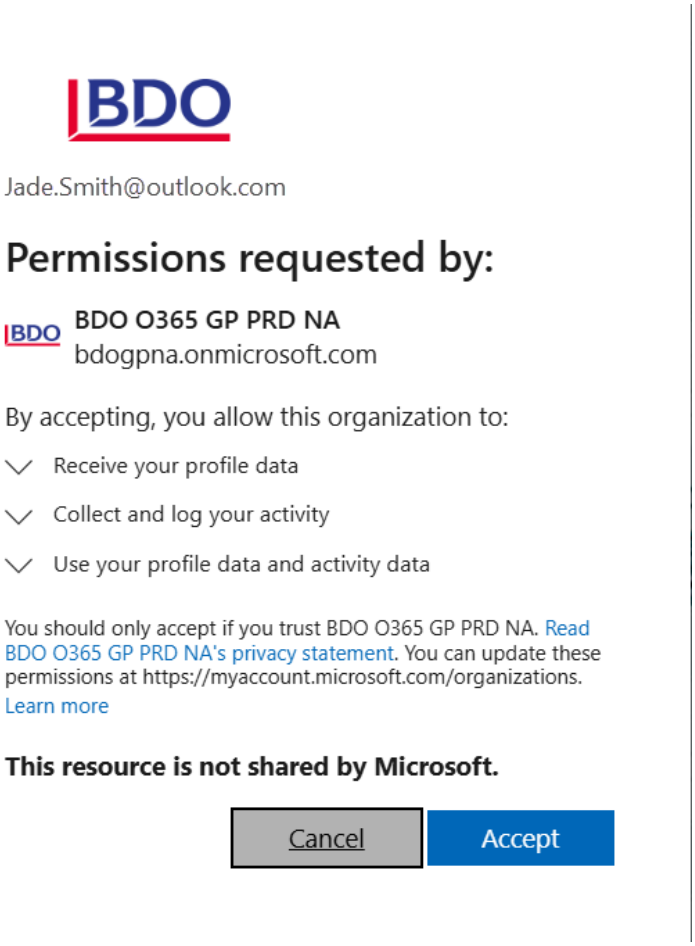
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Visit https://portal.bdo.global. Enter your email address and click the **Log in now** button. You will be redirected to the BDO login and authentication page where you need to log in with your email and password (see above).

Tip: Add https://portal.bdo.global to your browser bookmarks for quicker access. Please reach out to your BDO contact, if you experience any login difficulties.

2.4 Permissions prompt

When logging in to Global Portal for the first time, you will see a "Permission requested" prompt. This is a standard Microsoft message to inform you about the process of granting authorization to Global Portal to access protected resources on your behalf. For more information, please refer to Microsoft's Consent experience for applications in Microsoft Entra ID article.



Press the **Accept** button to proceed with the login and start working with Global Portal.

Terms and conditions apply and can vary per jurisdiction. Upon successful login users will be prompted to accept Global Portal's Terms and Conditions.

For more information on the initial setup visit the chapter on *Special task* types: subject to additional configuration by BDO

2.4.1 Signing and Approval tasks

Note: The Signing task is available only where and integration with DocuSign has been implemented. The Approval task is used to get sign-off on draft documents without a signature, such as draft tax returns or audit reports.

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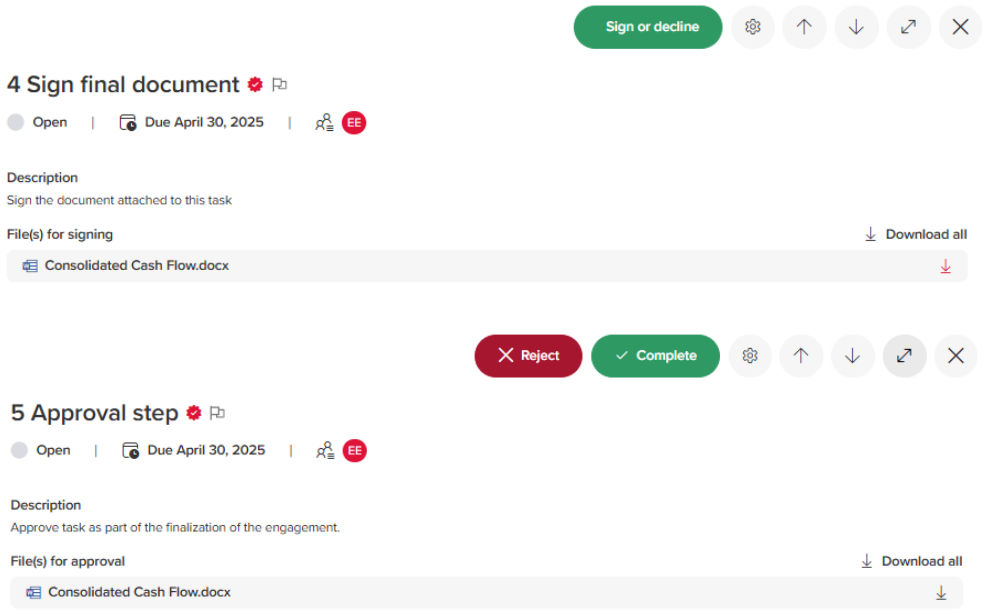
When a BDO user needs to request a signature, they will add you as an assignee to a Signing task in Global Portal. The Approval task is used to get sign-off on draft documents without a signature, such as draft tax returns or audit reports. Signing tasks have integration with DocuSign while Approval tasks have similar functionality for approving documents without DocuSign integration.

As an assignee you will start following the task and will get notifications based on your notification preference (status changes, comments, etc.). If you are the first (or only) assignee of the task, you will receive an email notification indicating that this task is open. When the signing order is set, additional assignees receive an email notification when it is their turn to sign the document. They can simply click on **Go to task** in the email, which will redirect them to the task in Global Portal.

In addition to the email notification, you will also get a bell icon notification on Global Portal indicating that there is a signing task ready for signing.

When you go to the task, you will see the task overview page that gives you additional information on the signing task. You can hover over the people icon to see the ordered list. The Green Icon next to the name indicates, that assignees already signed the documents. You have the option to download the PDF file so you can review the document before signing the document in DocuSign.

To provide a signature or approval, go to Tasks, choose the project and open the Signing/Approval task you are assigned to. Review the documents and press the **Sign or Decline** button in a Signing task or the **Reject** and **Complete** buttons in an Approval task.



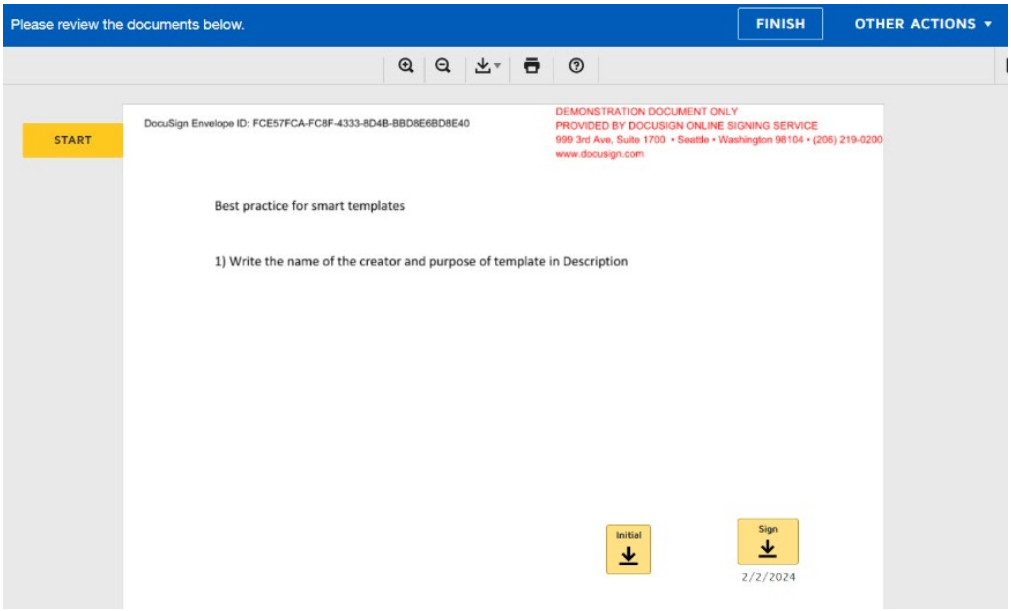
Please note that if you are on the ordered list and there are other assignees above you who have not signed the document yet, the **Sign or Decline** button will be greyed out with the message "Assignees prior to the current user have not signed or declined the task."

When it is your turn to sign the document, the **Sign or decline** button will become green.

Clicking on the **Sign or decline** button will give you the below notification which indicates that you will be taken into the DocuSign platform so you can sign the document.

Once you are in the DocuSign platform, you have the option to click on **Start** and the system will highlight the areas where you need to provide your initials and signature.

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Once everyone who is assigned signs the DocuSign document, the completed document can be found on the **Documents** page and in task overview page (in the File(s) section). This document cannot be edited.

Note: Approval tasks do not support signing order and can be signed at any time by each assignee.

2.4.2 Client request tasks

Note: If your BDO adviser has enabled the feature for client users to create "Client request" tasks, you will be able to see the "Create" button in the top right corner of the Tasks page. If the "Create" button is not visible, then this option is not available.

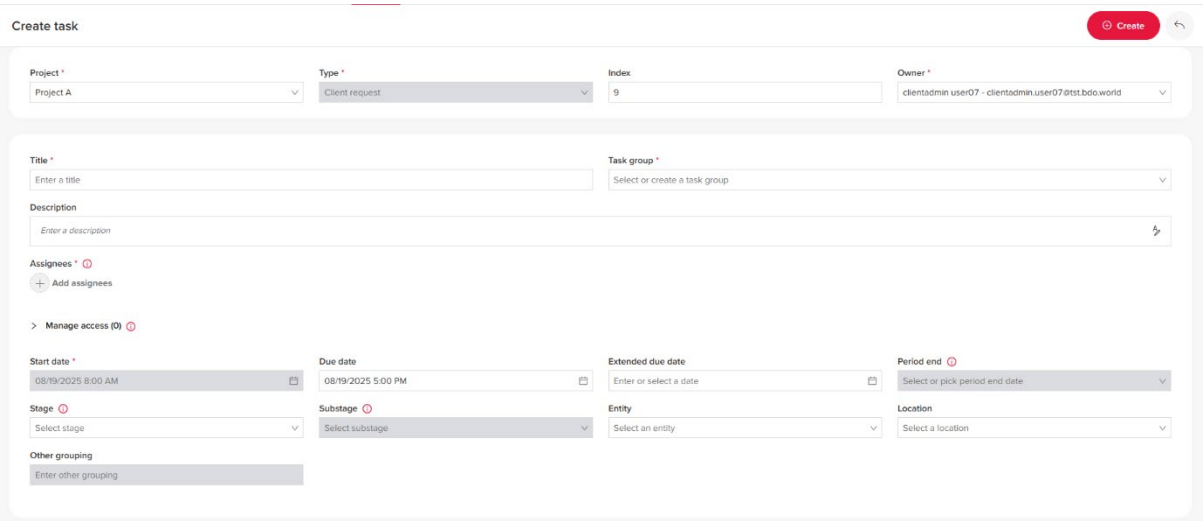
A Client request task can be created by a Client admin or a Client user. For client request tasks, the button **Deliver request** is always active, allowing you to deliver the task at any time, regardless of assignment status. If you are not the assigned user for a task, you can still deliver it. Upon delivery, you will be automatically added as the assignee. Once the task is delivered, the **Recall** task button replaces the **Deliver Request** button. Click it to change task status to in progress.

Upload the document to the **Uploads** section or add a comment to change task status to in progress.

2.4.2.1 Create Client request task

Client admins and users can create Client request tasks and even new task groups, provided permissions have been granted by BDO users. In the Tasks page click the button **Create** and select **Task**. Select any project and all other fields will be revealed for Client request.

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There are following fields in task creation form:

- Project – can be selected any project where Client requests are allowed.
- Type – prefilled with Client request and not editable.
- Index – up to 10 symbols can be entered.
- Owner (mandatory) – prefilled with current user but can be changed to any other client or BDO user, except reader.
- Title (mandatory) - up to 225 characters can be entered
- Task group (mandatory) - can be selected from the dropdown list or newly created if it is allowed in the project. To create new group, enter unique group title and click the line Create: [task group].
- Description – formatting can be applied to the text entered in this field.
- Assignees (mandatory) - at least one BDO assignee must be added. Up to 20 users can be added as assignees.
- Manage access – task can be restricted and visible only for users who have access.
- Start date (mandatory) - prefilled with current date 8:00 AM and is not editable.
- Due date – prefilled with current date 5:00 PM but can be changed or removed.
- Extended due date – empty by default but can be set later than due date,
- Period end – inactive.
- Stage – can be selected from the dropdown list.
- Substage – can be selected depending on Stage. If Stage is empty, Substage is inactive.
- Entity – can be selected from the dropdown list.
- Location – can be selected from the dropdown list.
- Other grouping – inactive.

Fill-in all mandatory fields and click the button **Create** on the top right corner to create the task. When the task is created, its overview page is displayed.

Upload the file (up to 2GB) to Client request by clicking the button **Upload** in the task overview page or drag and drop to the Uploads area. When file is uploaded, task status is changed to in progress. If due date is in the past, task status will be Overdue even if the file is uploaded.

Click the follow icon next to the task title or click **Options** icon and select **Follow task** to follow the task and receive notifications about it. Click the flag icon or click **Options** icon and select **Flag task** to mark the task as important.

2.4.2.2 Edit Client request task

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To edit a Client request task, click the **Options** icon and select **Edit task**. Please note that the following fields are not editable: Project, Type, Start Date, Period End, and Other Grouping. After making your changes, select Save in the upper-right corner.

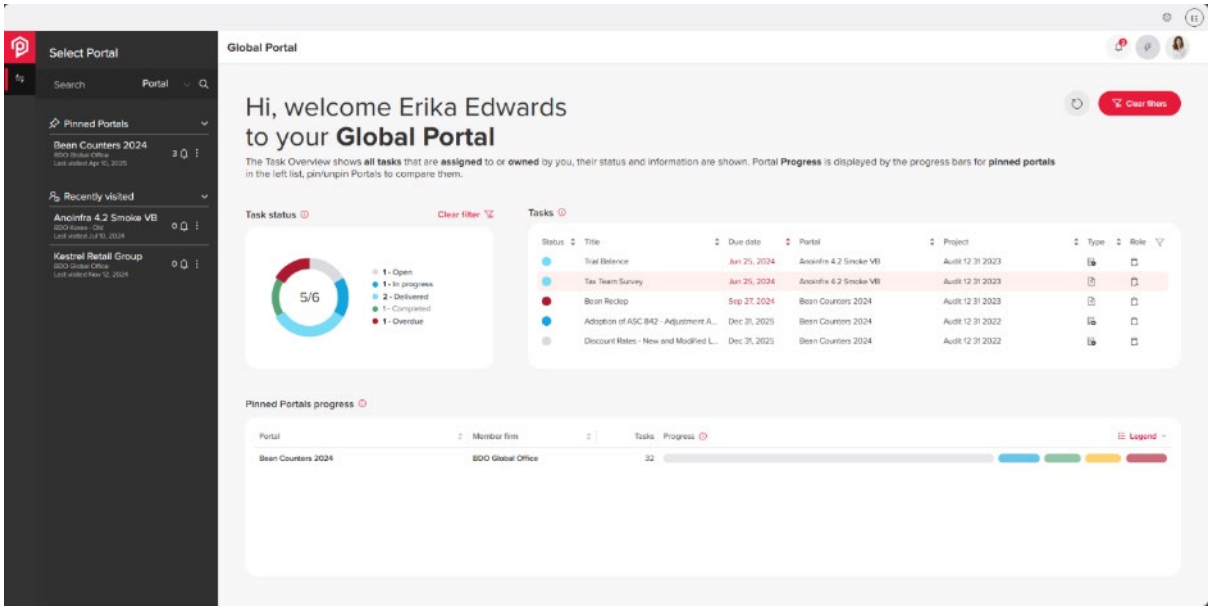
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Personal settings.

3. WELCOME PAGE

You have logged in from the Global Portal sign-in page, so what's next?

If you are assigned to more than one Portal, the **Welcome page** appears. All the Portals you have access to are listed in the left-hand black sidebar. See a summary of your tasks in the **Task status** and **Tasks** dashboards.



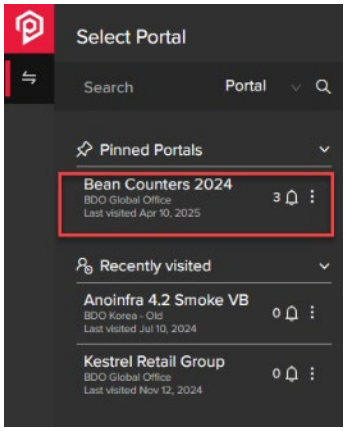
If you have access to **only one Portal**, you will be directed to the Portal's **Home page** (see below).

You can navigate back to the Welcome page by clicking the red Global Portal logo in the left upper corner of your screen.

Use the doughnut diagram in the **Task status** area to filter tasks by their status.

Click on a Task title in the **Tasks** area to open the task and deliver the requested information.

If you are assigned to more than one portal and you wish to open a specific portal, click the Portal name in the black sidebar on the left.



You can refine the list of Portals using the search field. Please note that the single quote (') character in the search keyword is not supported.

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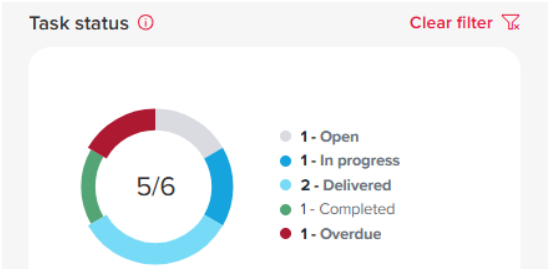
Note: On the right side of each Client Portal there is a notification bell indicating the unread notifications count for that Portal.

You can pin up to 5 Portals in the black sidebar that will then show in the Pinned Portals section. Pin and unpin portals via the three dots menu next to each portal name.

Note: If you are assigned to Portal(s) without enabled Tasks, you won't be able to see any task content on the Welcome page. Navigate to your Portal and go to the Documents page to exchange files with BDO.

3.1 Tasks status filter

The **Task status** filter shows only the statuses of tasks assigned to you and the number of tasks per status. If you have tasks labelled as "Open" and "Overdue," you'll see only these two statuses. If you have a task that's marked as "Completed," then the filter displays just that one status.



TASK STATUS NAME	TASK ACTION
Not Started	*The task Start Date is in the future*
Open	*The task Start Date is in the past*
In progress	*When 1 or more file or comment is added (Request Task) OR not all assignees have completed their actions (Signing, Approval, Action Tasks)*
Delivered	*All information has been provided and the **Deliver** button was selected.*
Completed	*The information provided in the task satisfies the Request Task and the **Complete** button has been selected OR when all assignees have completed their actions (Signing, Approval, Action Tasks)*
Returned	*When the information provided does not satisfy the Request Task*
Rejected	*When any of assignees rejected the task (Signing, Approval, Action Tasks)*
Overdue	*When a task is not completed, and the due date is in the past*

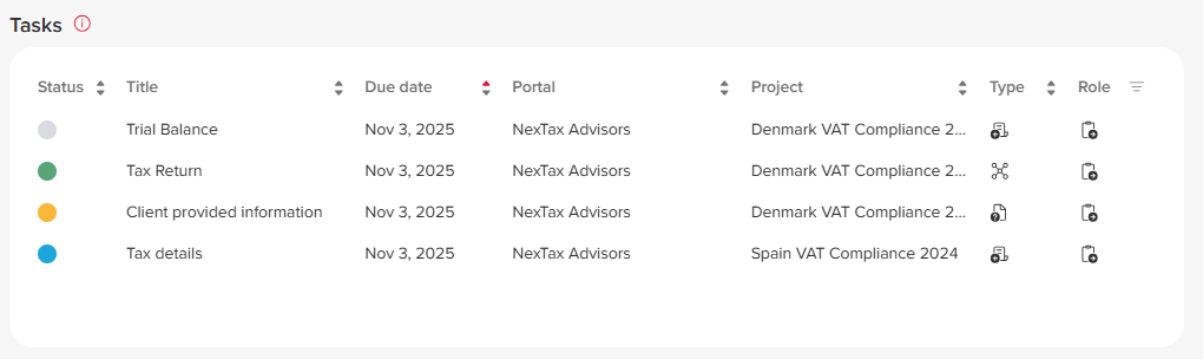
Click the **Clear filter** button to clear selections.

3.2 Tasks dashboard

The **Tasks** dashboard shows a task list with the following columns: Status - a coloured bubble (hovering on the bubble shows the status name), Title, Due date, Portal, Project, Type, Role.

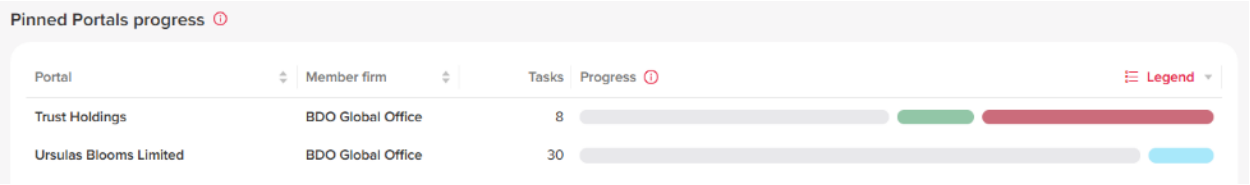
Click a task's title to open the task.

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3.3 Pinned Portals progress dashboard

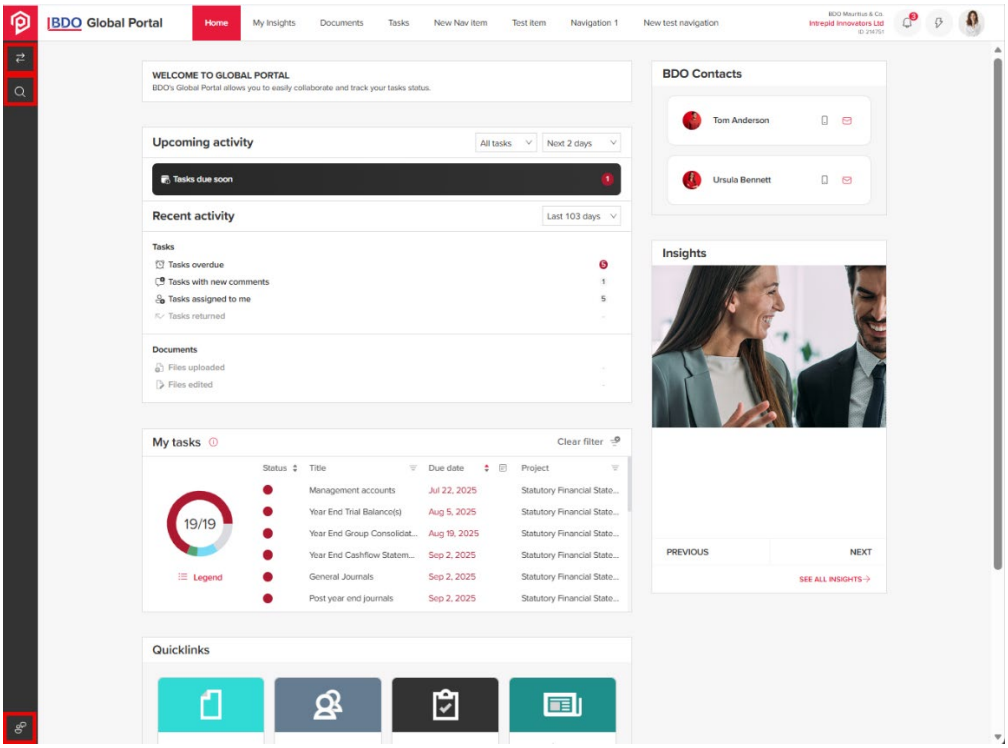
The Pinned Portal progress dashboard shows data for portals you pinned for quick access via the black sidebar.



The coloured pills are ordered left to right depending on the status of tasks. The size of the pill corresponds to the number of tasks with this status. Clicking on pills will take you to the Tasks page.

4. PORTAL HOME PAGE

The Portal Home page is the place where you can start reviewing the tasks you have been assigned to or go to the **Documents** page and start collaborating on files. This page is customizable and can contain additional buttons or links to systems and tools offered by BDO.



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4.1 Black sidebar icons

Under the red Global Portal logo in the upper left corner of the screen you can find the search button. Pressing the magnifying glass icon opens the black sidebar where you can search for *Files in Documents* and *Tasks*.

Click the sidebar toggle button  to expand the black side bar and navigate to other portals.

Click the feedback button on the bottom left corner to submit your feedback and recommendations for improving Global Portal.

4.2 Main navigation menu

The main navigation menu on the top part of your screen is customizable and contains:

1. **Links**: **Home**, **My Insights**, **Documents**, **Tasks**, custom links



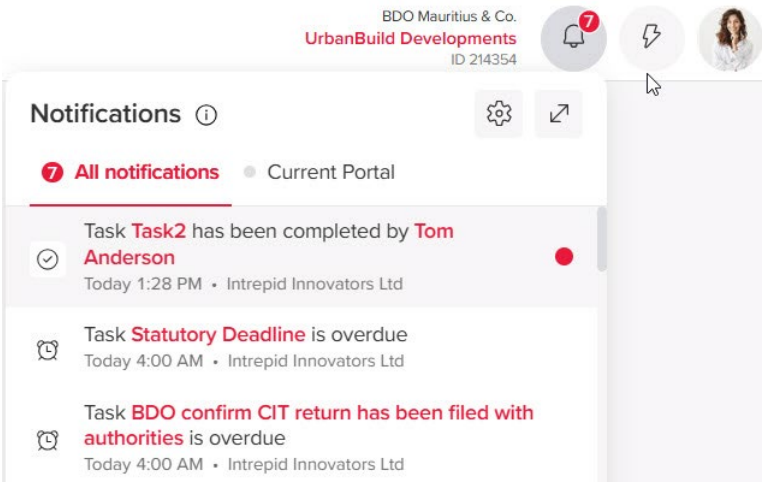
2. **Text block with navigation information**: Firm name, Portal name, Portal ID



3. **Icon menus**: Notifications **Bell** icon, **Lightning Bolt** icon and **Profile photo circle** icon. The menus under these icons contain key options for managing your notifications, team, and personal settings.

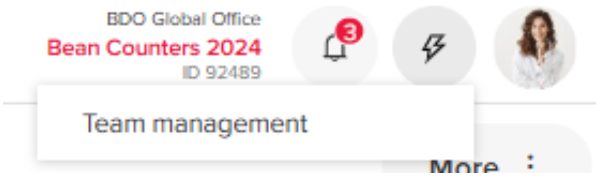


Click the Notifications **Bell** icon to review notifications about changes made to your projects and tasks, such as status changes, uploaded files etc. Under **the Gear icon** in the **Notifications** menu, you can select **Mark all as read**, set your **Notifications preferences** or click **the Double arrow icon** to expand notifications and open a page to sort and filter by notification type.



Click the **Lightning Bolt** icon to access the **Team management** page. If you have the Client Admin role, you can manage your team's access to specific projects in this portal.

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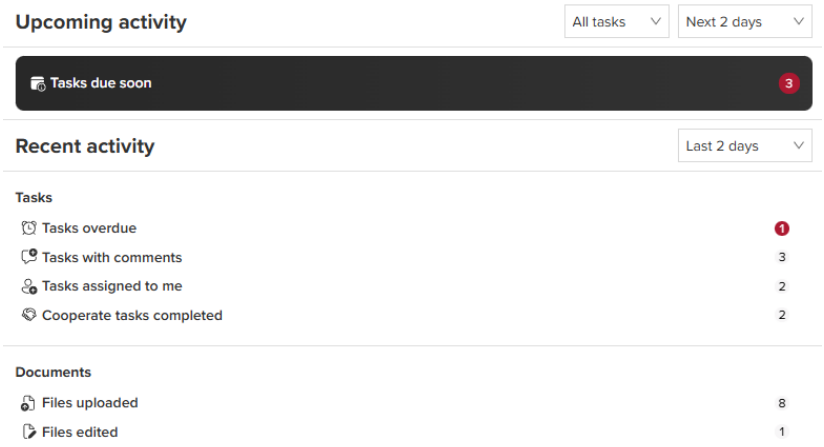
Click the **Profile photo circle** icon to access your **Personal settings**, revisit **Virtual tour**, **Coaching**, **Global Portal Terms** or **Log out**.

4.3 Welcome webpart and BDO Contacts

If the Welcome webpart is set up on the page, it appears on the left side of the home page. Information about your BDO contact(s) is displayed in the right top corner. Select the icons to the right of the person's name to view phone numbers and email addresses (see screenshot below).

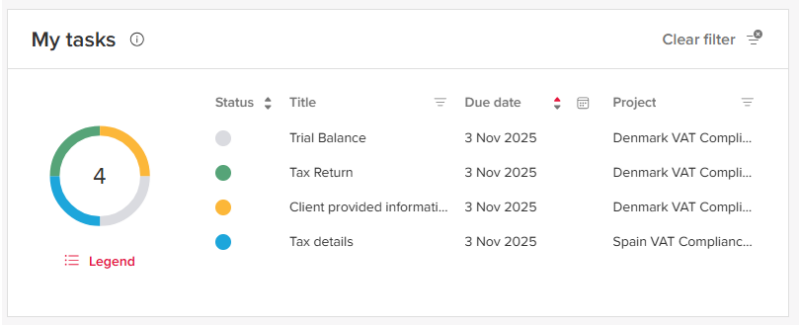
4.4 Recent activity panel

Each Portal Home page features a **Recent activity** panel. The panel lists activities that happened during set time. Clicking on each text label will take you to a prefiltered list of tasks or documents.



4.5 Home page dashboard

Each Portal Home page shows a **My tasks** dashboard. The dashboard lists the tasks to which you are assigned. Use the sort and filter buttons on each column to find a specific task.



4.6 Quicklinks

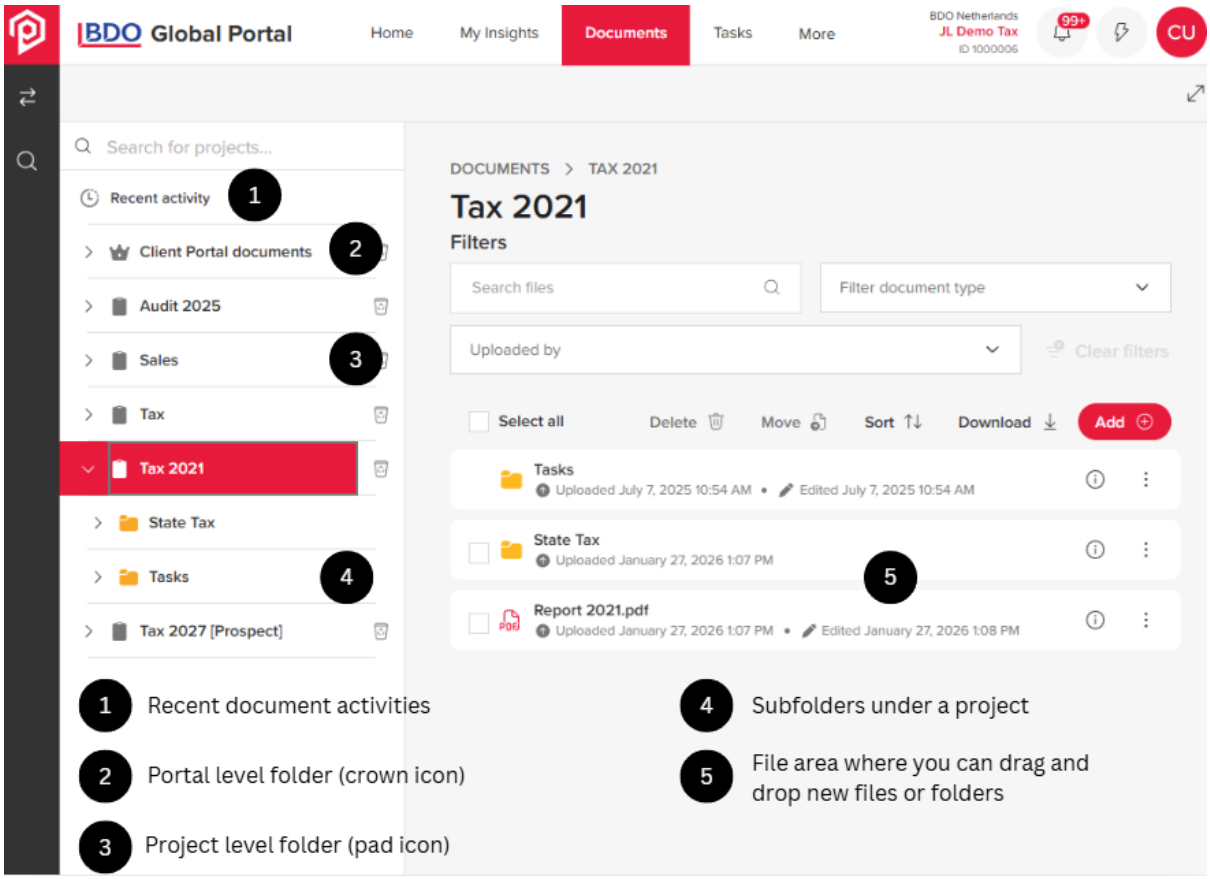
The **Quicklinks** block appears under the dashboard and can vary per portal. Links in this block can direct you to pages within Global Portal or to external tools or pages.

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4.7 Insights

Information appearing in **Insights** is extracted from the BDO Firm website. Click the **See all insights** link to display a page with more articles and options to set your preferences.

5. GETTING STARTED WITH DOCUMENTS



To access documents such as your financial statements, tax returns, letters, or other deliverables from BDO, select the **Documents** menu and see a list of projects and folders. Navigate to a particular project (signified by the pad icon) using the navigation on the left.

Note: The **Documents** library may be turned off and altogether missing from the main navigation menu. If your BDO contacts are sending you task requests only in **Tasks** (see below), you need to navigate to the **Tasks** page (previously called "Exchange Next Gen").

5.1 Documents structure

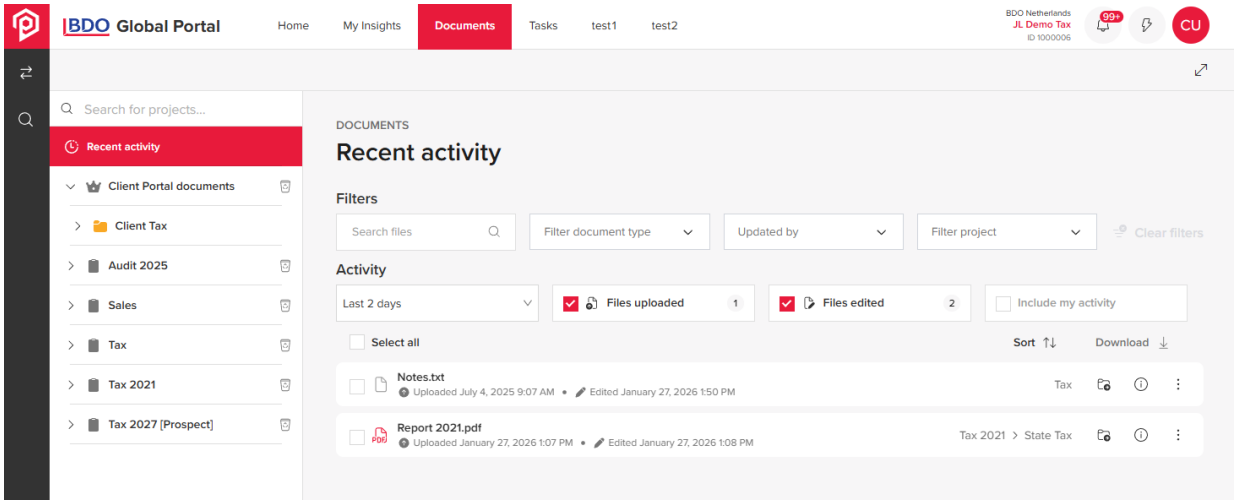
On the **Documents** page you can view files on a portal or project level.

Project folders that were created in **Tasks** are read-only (marked by the lock icon) and no upload is possible via the library. Files uploaded to Client request tasks are also displayed in Documents page, Tasks folder. If you need to upload files and your permissions allow it, use the project level folder.

Note: Client users cannot upload files on the portal level (signified by the crown icon). If you need to upload files, please browse to the corresponding project folder or subfolder (signified by the folder icon).

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5.2 Recent activity



The **Recent activity** page opens on the right side of your screen when you click **Documents** on the main navigation menu. The page displays documents recently uploaded or edited and allows you to quickly navigate to recent items your team is working on.

5.3 Upload a document

If upload is allowed, the red **Add** button appears in the top right corner of the file area. Select an option from the **Add** button menu or drag and drop documents in the file area.

You can upload single or multiple documents and folders. Only one document with the same name can exist in a folder. A document which is being uploaded cannot be selected, edited, renamed or deleted. The options to perform document actions appear only after the upload is complete.

5.3.1 File upload limits

- 30 files are the total amount of files which can be uploaded via File Select or Drag & Drop function at once.
- 2GB is total size of files which can be uploaded at once.
- 2GB is maximum allowed size of a single file for upload.

It is not recommended to upload more than 5000 files or folders into a single folder.
Currently supported file types:
.pdf,.jpg,.png,.gif,.zip,.rar,.txt,.doc,.xls,.ppt,.docx,.xlsx,.pptx,.gme,.eml,.msg,.vsd,.vsdx,.html,.xsl,.xml,.preview,.xslt,.jpeg,.xlsm,.htm,.docm,.xps, .mp4,.7z,.log,.xlm,.pptm,.zipx,.csv, .qbw, .qgw, .qba, .qbb, .qbm, .qbx, .sdb, .sdw, .sai, .saj, .abk, .aga, .agacc, .agaccbackup, .agacctransfer, .agex, .agexbackup, .agextransfer, .qdf, .sie, .se
While uploading a document, you can continue working with other files.

Tip: If you need to upload a file of a type that is currently not supported, you can try zipping the file(s). Please reach out to your BDO contact if the file(s) you are uploading are not accepted.

5.3.2 Characters support in file names

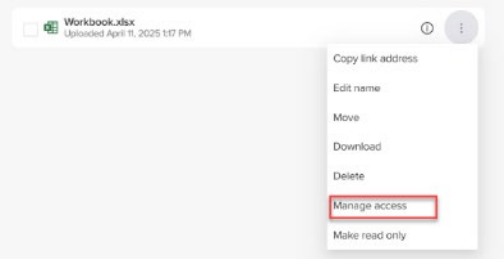
- English alphabet is supported
- Norwegian alphabet is supported
- Hebrew alphabet is supported
- File names cannot contain any of the special characters: " * : < > ? / \ ~ |. If the upload contains the characters, an error message is displayed and it is not possible to proceed.
- Each document name must be unique per the parent folder. A validation message is displayed if a duplicate named file is uploaded.

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- A document name must be between 1 and 100 characters.

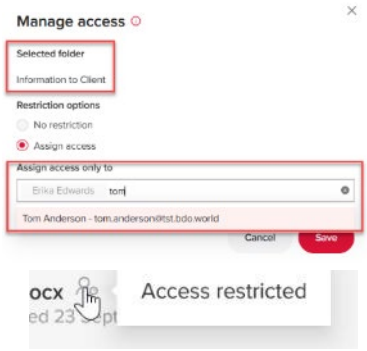
5.4 Manage access to a document

Access to a document or a folder can be restricted by managing its access to a select amount of people. Only Client Admin users (on either portal or project level) can use the **Manage access** option in **Documents**. An Access restricted icon (lock) appears next to restricted files.



Click the **Manage access** option to open a new window to set accesses. Two toggles appear:

- **No restrictions**: removing access restriction, any user who has access to the Portal/Project can see/edit the files.
- **Assign access**: assigning access restrictions, and any users who have access to the Portal/Project can be set to receive managed access to the folder.



The user who is managing the restricted accesses for the folder, cannot remove themselves from the list. When a folder gets its access restricted, it is marked with a lock icon.

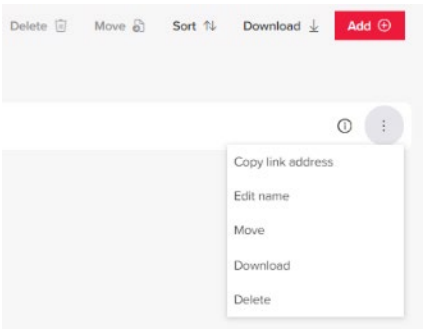
Any files and folders inside this restricted folder inherit the parents' restrictions and can only be reached by the user with explicit access. Unlike the folders with restricted access, the inherited access folder and files do not display a restricted access icon.

5.5 Edit a document

Documents that were uploaded directly to the **Documents** library can be edited if this is allowed in your project settings. If you can open the documents in your browser via the online M365 apps, you can edit, and your changes are automatically saved.

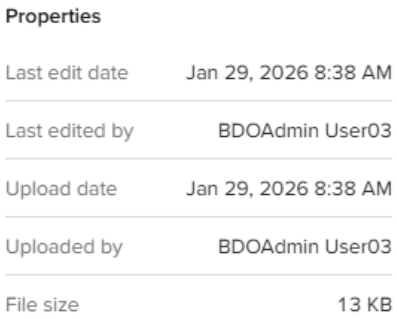
If viewing files online is not supported, an option to download the file appears.

Manage documents and properties via the options next to the Add button or under the ellipsis button ⋮.



Click the ⓘ info button to view **Properties**.

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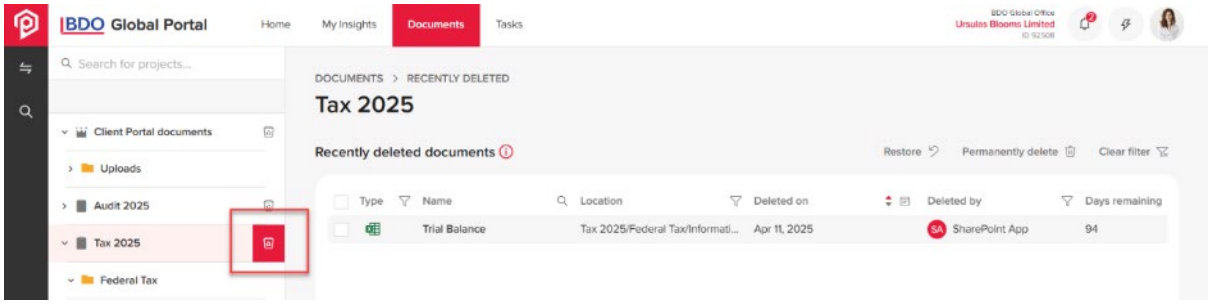


Note: A document is in Read-only mode when there is a lock icon next to its name. It means that all users can only view the file and not edit it. This ensures that the document remains unchanged and accessible for viewing by everyone.



5.6 Delete files and folders

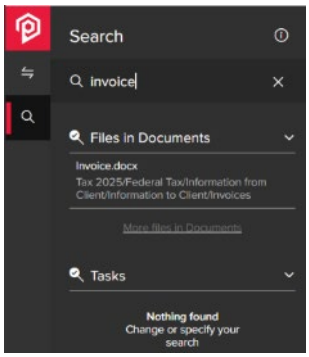
Files and folders can be deleted, if they are not read-only. Deleted files and folders are moved to the recycle bin where they stay for 94 days. In the **Recently deleted** page files and Folders can be restored to the original directory or permanently deleted.



5.7 Search documents

You can search for specific files from any location on Global Portal. Insert the search term next to the search icon. Folder names do not appear in search results.

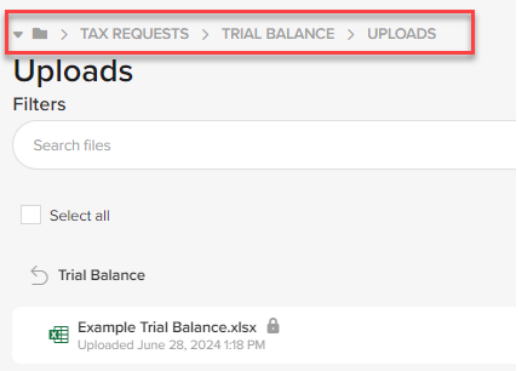
***Note**: New Files and Tasks need to be indexed by the system after each change. This may take between a few minutes and 24 hours.*



5.8 Breadcrumbs (file paths)

A breadcrumb is a graphical control element used as a navigational aid in user interfaces. It allows users to keep track and maintain awareness of their location in the directory.

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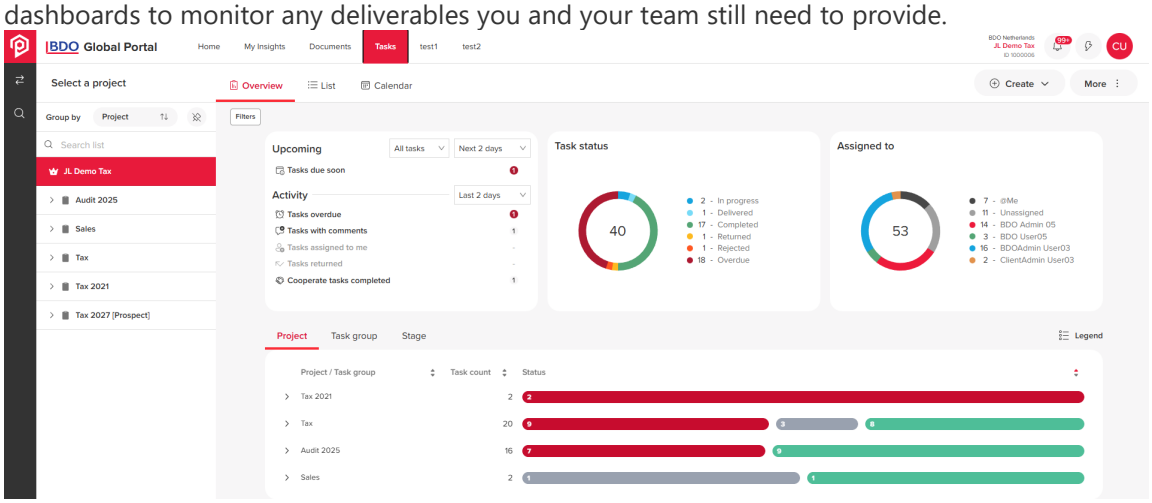
Only the last three folders are displayed (closest to the current directory). The rest are in a list under the drop-down.

6. TASKS

Note: *In April 2025 the **Exchange Next Gen** page was renamed to **Tasks**. If you are looking for your tasks, navigate to the Tasks page via the main navigation menu or the Tasks dashboards on the Portal home page. In some instances, Exchange Next Gen references in menus and messages can still be preserved.*

Click the **Tasks** option 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.



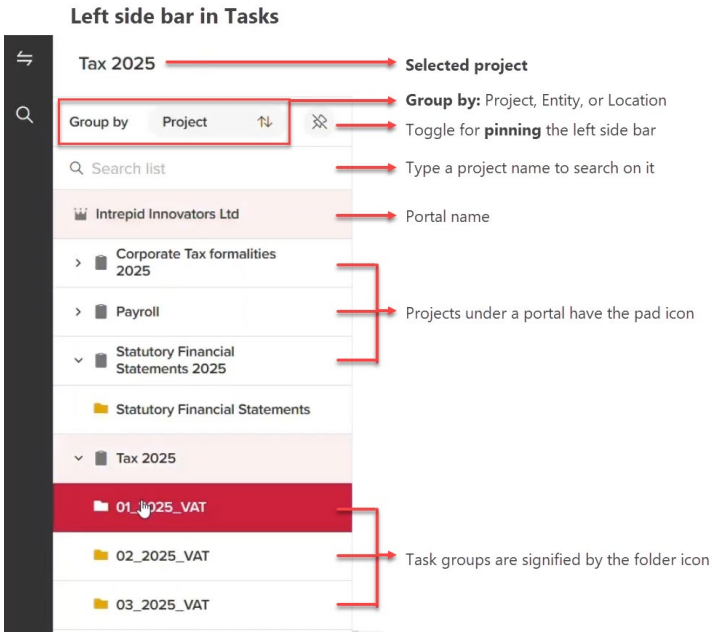
The **Tasks** page has three main views: **Overview** (default), **List** and **Calendar**. Select a view under the main navigation menu. The view you are currently in is coloured in red and underlined:

6.1 Left side bar

The left side bar is pinned by default. It displays the project list together with task groups. Change the standard grouping by selecting Entity or Location in the expandable **Group by** menu.

In the example below there are four projects and two of them have been expanded to display the available task groups. Click the small arrow to the left of each project's name to expand or collapse its task groups.

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Tip: Hover your mouse on a project and you'll notice the **Follow** button on the right. Click the **Follow** button to add all tasks in this project to your follow list and you will be able to receive more notifications as defined in your preferences and also filter in list view.

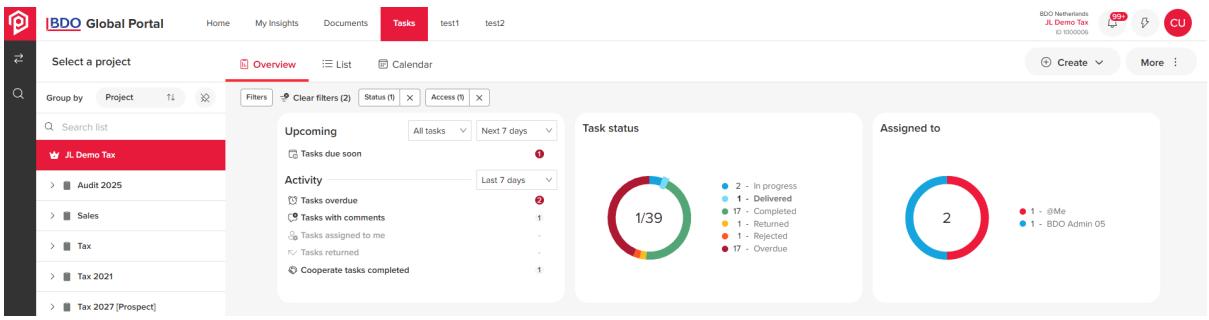
6.2 Overview view

The default **Overview** view appears when you navigate to Tasks. It features two rows of graphical filters and dashboards, helping you quickly access a prefiltered list of tasks.

On the top left, you can see the section showing **Upcoming** deadlines and **Activity** on tasks you are working on. Click a text label (for example: **Tasks with comments**) to navigate to the list view of tasks with recent comments. Use the filters in the section to adjust the types of tasks or the period you need. To the right are two doughnut charts visualizing the breakdown of tasks per status and assignee.

On the right of each doughnut, you'll find a list of available data options. You can click on a coloured segment or the label names to filter tasks you want to start working on, such as selecting "@Me" in the **Assigned to** doughnut filter (refer to the screenshot below).

Note: You can view tasks assigned to other users, but you are not able to process them.



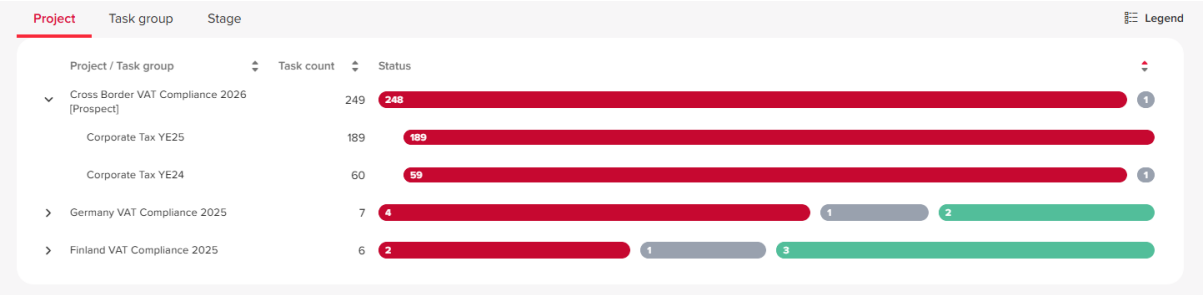
Once you apply your selections, navigate to the **List** view to start processing your tasks, or head to the progress dashboards in the lower part to further refine your tasks and navigate to the ones you'd like to review or process.

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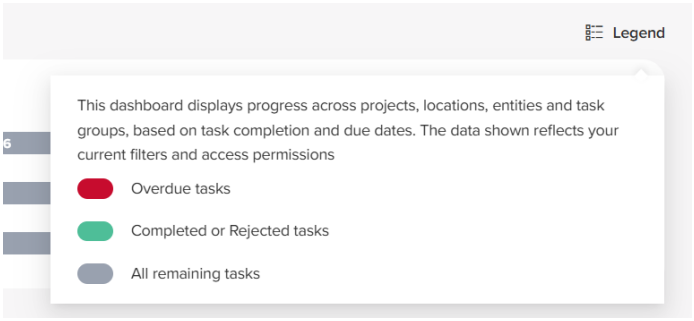
6.2.1 Project/Entity/Location progress dashboard

The dashboard displays tasks' progress based on the selected grouping. Select **Project**, **Entity** or **Location** from the **Group by** dropdown to update this dashboard.

Click the arrow in front of any project, entity or location to view its task groups. The coloured pills on this dashboard indicate task progress. Select a pill to open relevant tasks in the **List** view.



The pill colours can be Red, Green and Grey and correspond to Overdue, Completed/Rejected, and All remaining tasks' statuses.



Note: If filters are applied, some pills in the dashboard may appear greyed out. However, they remain interactive - selecting them will update the filters and display the corresponding tasks in the List view.

6.2.2 Task group dashboard

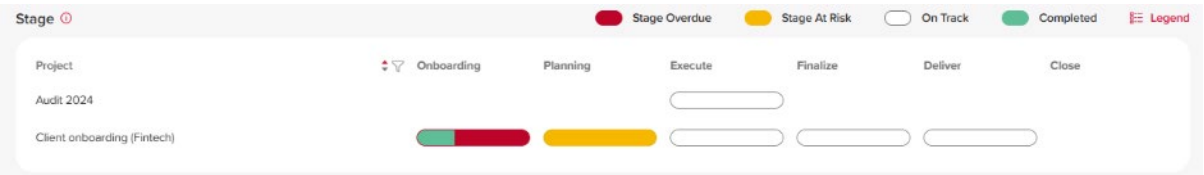
To view progress by **Task group**, open the second tab of the progress dashboard.

Click the arrow in front of a task group to expand it or select any pill to apply filters and view the related tasks in the list view.

6.2.3 Stage progress dashboard

To view task statuses by **Stage**, open the third tab of the progress dashboard. The **Stage** dashboard displays the current status of tasks based on their **Stage** and **Due date**.

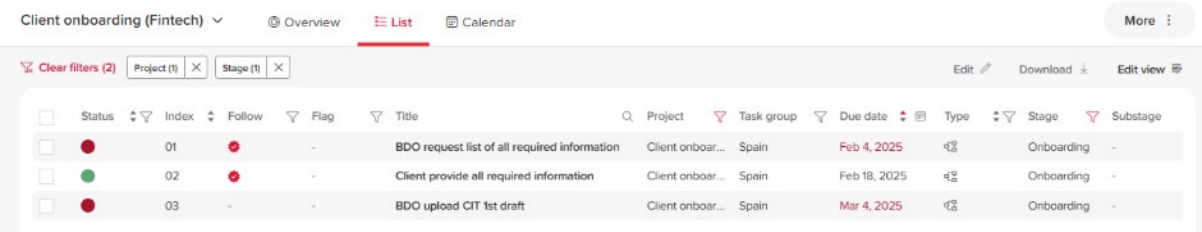
Click on the stage pills to open relevant tasks in the List view.



The **Stage** progress dashboard has been designed to help you identify the stage of your engagement and focus areas. Click on a project's stage (Onboarding, Planning, Execute, Finalize, Deliver, Close) and you will see a list view of the tasks in this stage.

Here is the view that opens, if you click the green-red pill in the **Onboarding** stage of the "Client onboarding (Fintech)" project:

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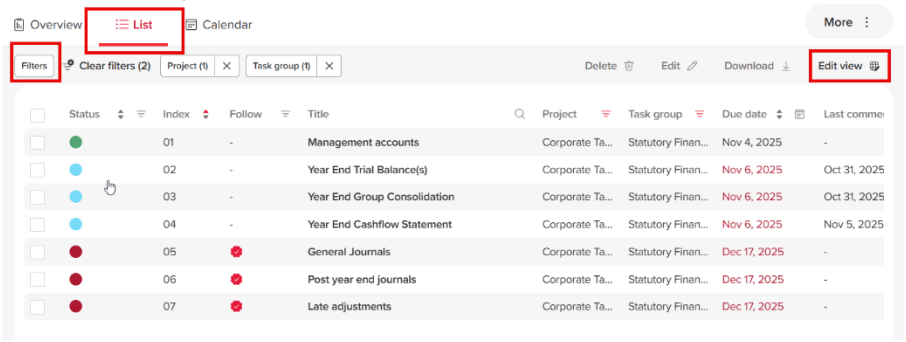
If you'd like to view tasks in the next stage, you can either return to the **Overview** and select a different pill, or filter on the **Stage** column in the **List** view.

Note: Some portals may not have data about stages. To see all the tasks available in this portal, go to the **List** view. In such cases you will see the below message and link that will take you to the **List** view.



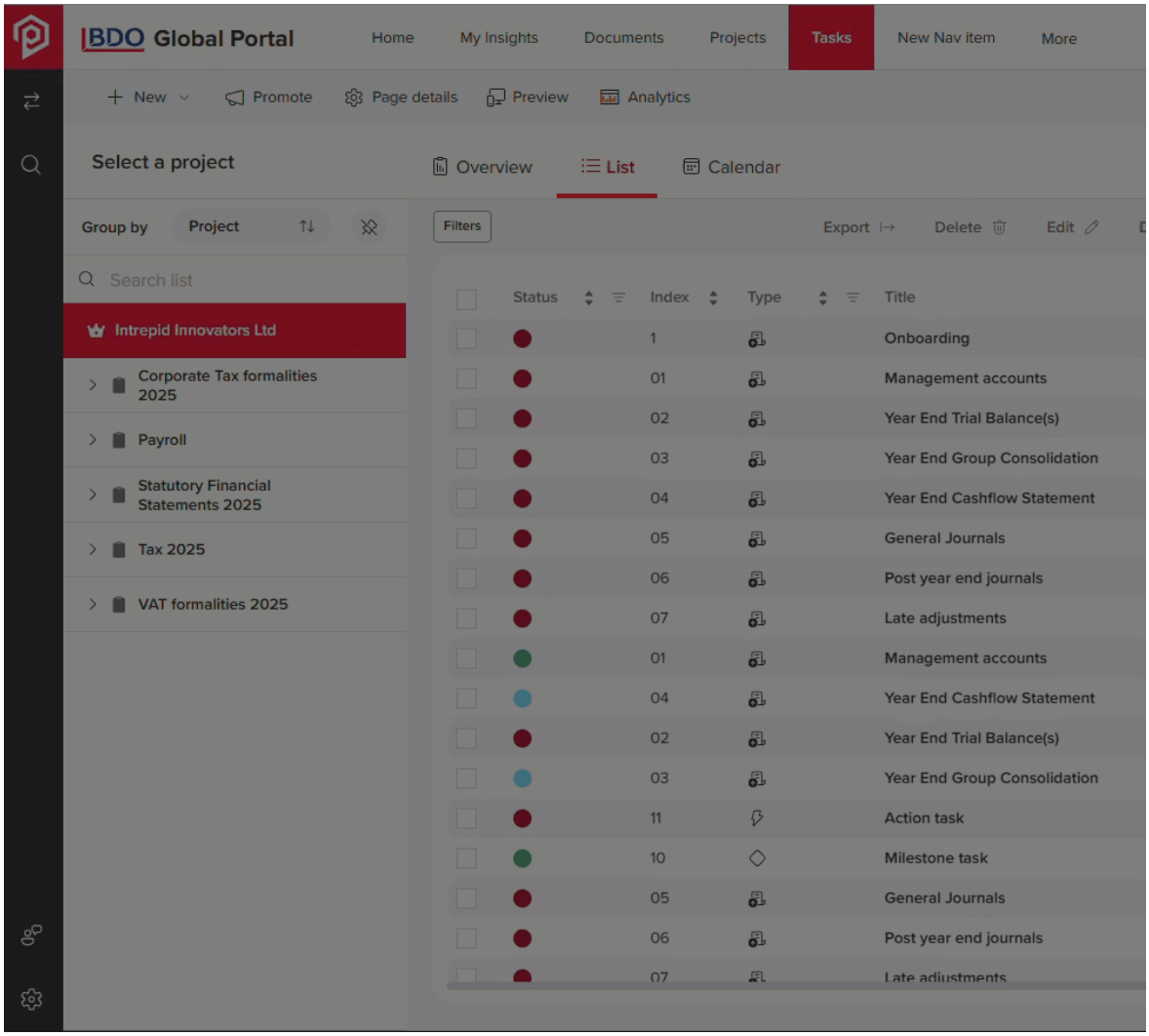
6.3 Task actionsList view

To view tasks in a list format, select the **List** view tab.



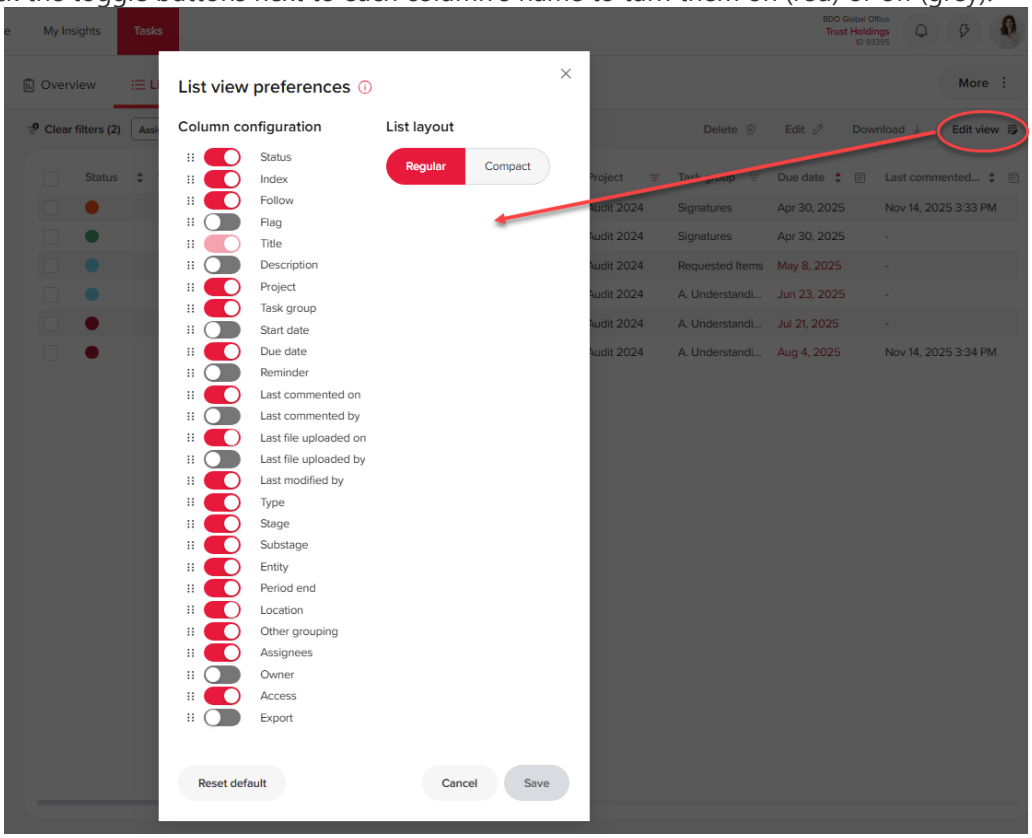
Use the **Filters** button to expand a panel containing filtering options. Search, expand, or collapse filters in just a few clicks.

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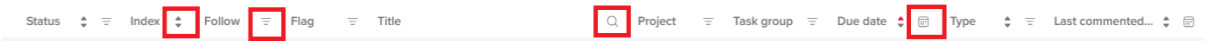
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Customize the columns in the table view via the **Edit view** button. A **List view preferences** dialog will open. Click the toggle buttons next to each column's name to turn them on (red) or off (grey).

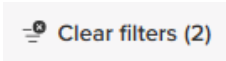


Change the order of the columns by clicking on the dots icon and dragging each column up or down. Reset the view by clicking the **Reset default** button. Don't forget to scroll down and click the red **Save** button to save your preferences.

6.3.1 Advanced filters in List view



Use the table's headers to sort , filter , search by keyword or select dates in a calendar picker .

Click the 

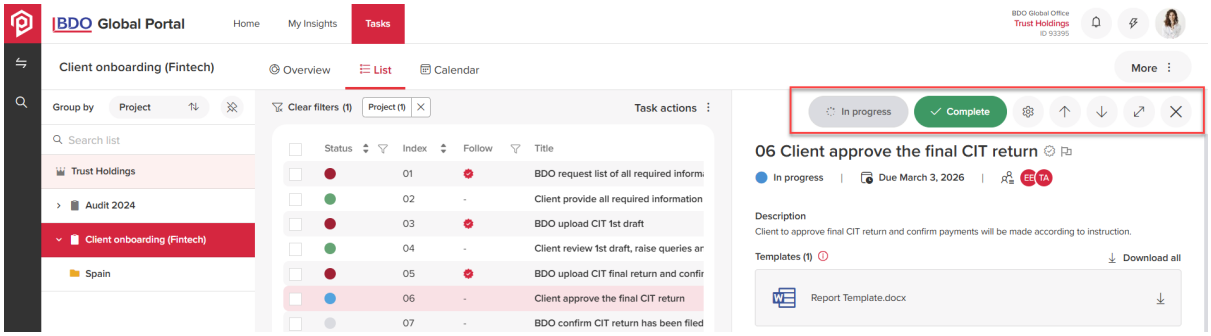
dynamic option to clear all applied filters. The option does not appear, if no filters are applied.

Note that the filters are kept while changing views between **Overview**, **List**, and **Calendar**.

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6.3.2 Tasks split view

Click a task's row and the task opens next to your list. The selected task's row gets highlighted in light red and you can preview it in a split view on the right. Review task details or perform actions using the top menu buttons.



If you'd like to see an expanded view of your task, click the button with the two arrows . You can also unpin the left side bar menu by clicking on the button with the crossed-out pin This will give you more space on the screen to perform more complex work. For more details on what you can do within a task, see *Task actions*.

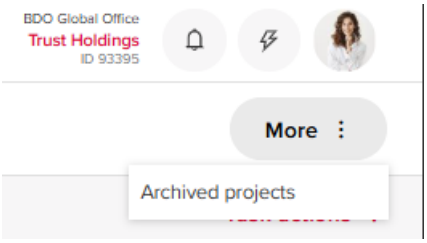
6.4 Calendar view

If you choose the **Calendar** view, a default monthly view appears. Switch from monthly to annual view by using the **Month | Year** button on the top right corner.

Note: If a task does not have a due date, it is not displayed in the **Calendar** view. If multiple tasks fall on the same day or month, a full task list can be accessed using a scrollbar.

6.5 More

In the right top corner of the **Tasks** page there is a grey button **More**. It lists the option to open the **Archived projects** page and consult old projects that have been archived.



Note: Archived projects are read-only. You cannot make changes, but you can download related files or reports. To download, go to the task overview page, select the gear icon, choose **Download**, and then select the appropriate option based on the task type and details.

7. TASK ACTIONS

Your BDO adviser will assign to you tasks that will require you to upload files, provide signatures or answer questionnaires.

Once you open task overview, start exploring the task's title, description, and templates if they are added. Note that all documents attached to a task can be previewed in your browser. There are download links on the task itself in case you need to have a local copy.

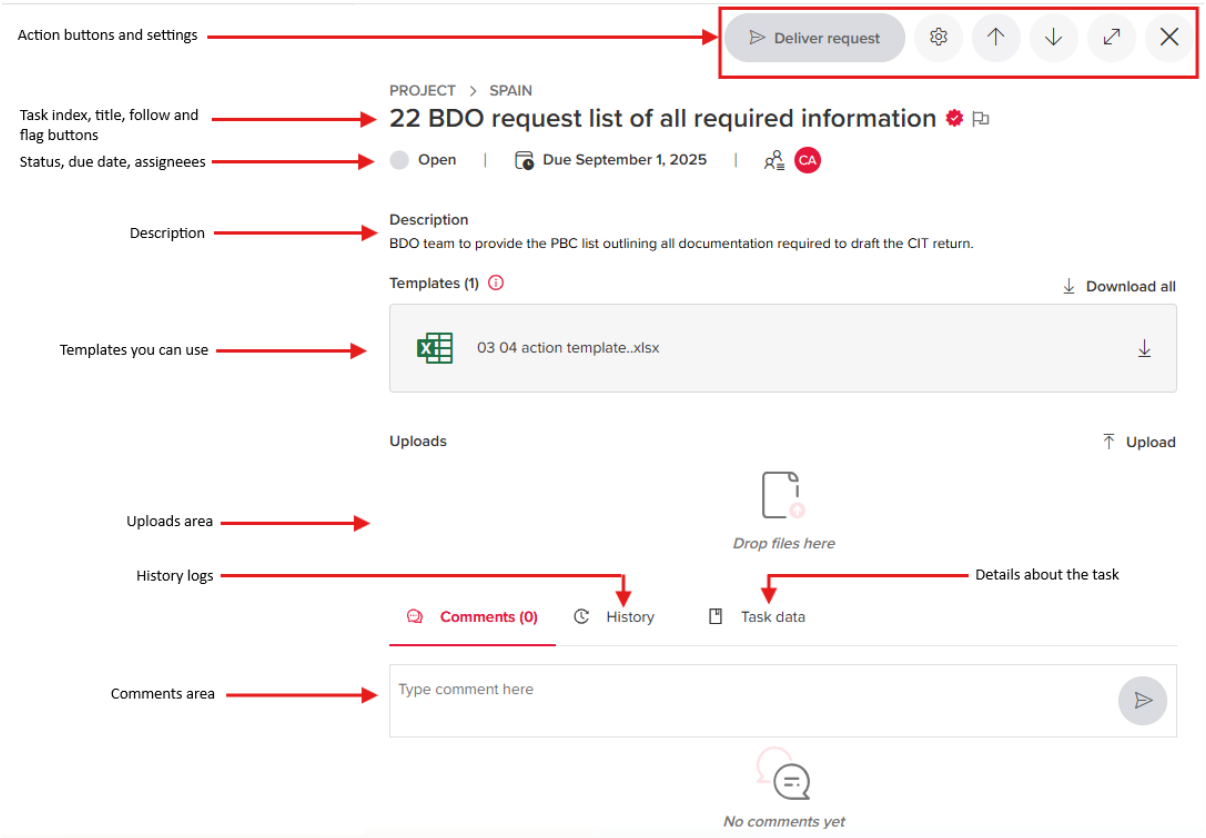
The structure of a task and the available actions vary depending on the task type.

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To view history logs about task changes, open the **History** tab on the task's page. Open the **Task data** tab to view task details such as type, owner, start date, stage and others.

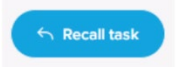
7.1 Request item

Once you open a task from the **List** view, start exploring the task's title, description and templates. Note that all documents attached to a task can be previewed in your browser. There are download links on the task itself in case you need to have a local copy.



When you are ready to complete a task, upload the requested documents in the **Uploads** area (by drag-and-dropping or use the **Upload** button. Use the comments area to discuss a task with your BDO team. Type the **@** character to mention a specific contact. When a file is uploaded or a comment is added, the task status changes to "In progress".

Don't forget to click the green **Deliver request** button. Not that the **Deliver request** button becomes active only after the request is in progress.

For tasks of the Request item type assignees also have the option to recall it. You can recall an already delivered task to continue working on it via the blue 

button. The task should become 'In progress' (or Overdue, if its due date is in the past).

7.1.1 Upload files/folders to a task

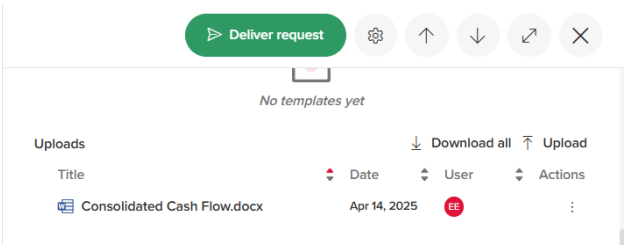
Rules for adding folder/folders with files to the **Uploads** section are:

1. Only one-level folders can be added;
2. If a nested folder is added, the system displays a warning: "The uploaded folder contains sub folder(s), this is not permitted. A folder only containing files can be uploaded here."
3. Files cannot be added to the already uploaded folder;
4. Folders and files are displayed in a file tree.

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5. Allowed file extensions depend on each Tenant setting. Reach out to your BDO contact if you need to upload a file that has a different extension than the ones listed in *File upload limits*
6. File size restriction applies the same as files in Documents (2GB).
7. If more than 8 files are uploaded, a scroll bar appears.
8. All files can be downloaded at once on **Download all** button. Files are zipped.

When a BDO or a Client user adds at least 1 file or comment, the task status changes from *Open/Not started* to *In progress*. Changing the status activates the action buttons at the top of the task: and the **Deliver request** button is visible as active. Buttons for delivering tasks may vary depending on the task's type. Once you upload all files requested, don't forget to click the coloured buttons to submit the task to your BDO team.



7.1.2 Read-only/editable Request Item documents

Upload and Template files in Request task should be read-only or editable depending on a Request task status:

TASK STATUS NAME	DOCUMENT ACTION
In progress	*All files in Uploads and Templates in this status are editable;* *If files are deleted afterwards, Task status stays In progress and files are still editable.*
Delivered	*After Client user clicks on Deliver request button and task status becomes Delivered, then all files in Uploads and Templates become read-only in both Tasks and Documents pages.* *If you add additional file to uploads, task status goes back to In progress. All files become editable, until user clicks on the Deliver request button again, and makes task status Delivered, with all files in read-only mode.*
Completed	*All files in Uploads and Templates become read-only both in Tasks, and in Documents page.*
Returned	*All files in Uploads and Templates in Returned status are editable; Task is also editable.*
Overdue	*Files have same restrictions as in the status prior to Overdue.*

You can add additional file(s) to the Uploads section, except when a task is in status *Completed*.

All files in the Tasks folder in Documents become read-only when a task gets status Delivered or Completed. Files that have a lock icon next to the title are read-only. The read-only status depends on the status of the task (when it is Complete or Delivered).

7.1.3 Storing Tasks files to Documents

All templates and files uploaded through Tasks are saved in the **Documents** page under a particular project. Every Project has a folder named *Tasks* by default and you can display Properties, sort, download and search the files.

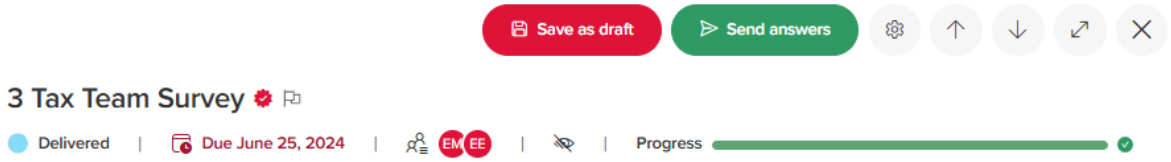
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You can't add additional files or folders from the **Documents** page to any of the Tasks folders. Folder names cannot be edited from the **Documents** page. Tasks structure folders (Tasks, Task group name, Task name, Templates, Uploads) cannot be deleted from **Documents** page.

If a file name or a task name gets changed in **Tasks**, it will be updated in **Documents** as well.

7.2 Answer a Survey task

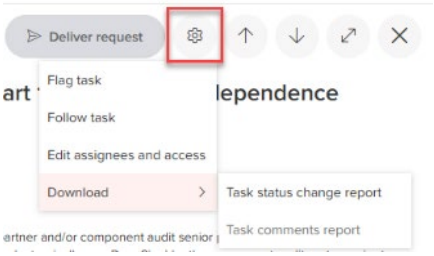
Survey tasks are designed to collect information outside of documents, such as dates, names, addresses, or amounts.



Fill out the survey. In certain answers you can have an option to attach a file to your form. Do not forget to click the **Send answers** button on the top of the survey when you are ready to submit it. The button is active only if all mandatory questions are answered. If you need more time, you can click the red **Save as draft** button and complete the survey later.

7.3 Actions in tasks

The round button with the gear icon in all tasks' headers allows you to:



- Flag/Unflag a task
- Follow/Unfollow a task
- Edit assignees and access *(Client Admins only)*
- Download *Task status change report* and *Task comments report*. For Signing and Approval tasks there is an additional option *Signing/Approval logs*. In Survey tasks you can download the task in Excel and PDF format.

7.3.1 Flag a task

Flagging a task via the **gear button** or the flag button next to the task's title indicates that you'd like to draw attention to this task.

The activated flag will appear in red next to the task's title and in the List view to all users with access to the project:



Use the filter in the **Flag** column in **List** view, if you'd like to filter on flagged tasks.

To unflag a task, open the task and click the red flag button next to its title or select **Unflag task** under the gear button.

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7.3.2 Follow a task

Following tasks via the **gear button** or the check button next to the task's title enables direct access to tasks that are relevant to you, eliminating the need to navigate through unrelated tasks.

The activated follow check will appear in red next to the task's title. Only you will be able to see your own followed tasks in the List view.

Use the filter in the **Filter** column in **List** view, if you'd like to filter on followed tasks.

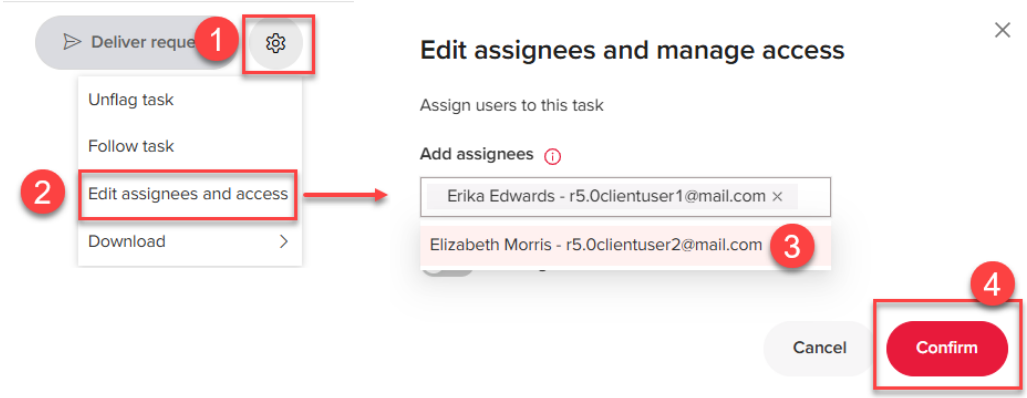
To unfollow a task, open the task and click the red check button next to its title or select **Unfollow task** under the gear button.

7.3.3 Edit assignees and access

You can edit Client assignees and manage access for Request, Survey, Client request, and Action tasks that are not in Completed or Rejected status, and Approval tasks that are not Rejected. Client user roles that can edit assignees and manage access are:

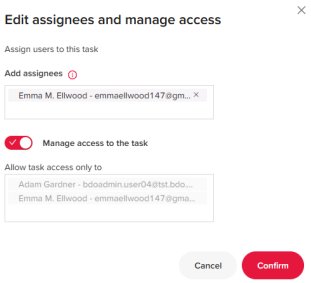
- Client Portal Admin
- Client Project Admin
- Client Project User

Open a task, click the gear button, select **Edit assignees and access**. A pop-up **Edit assignees and manage access** opens.



You can add/delete yourself and other Client-side users in the **Add assignees** field. Client-side users do not have the ability to manage BDO users. As an exception, client-side users can assign BDO users to client request tasks and mark these tasks as restricted if needed.

You can restrict or unrestrict a task; however, you cannot grant access to BDO users or remove them from the task. Assignees are added by default to the **Manage access** field (see an example from a task with restricted access in the screenshot below) and can't be removed. If a Client User wants to remove Client-side users' access, they should make changes in Assignees fields beforehand.

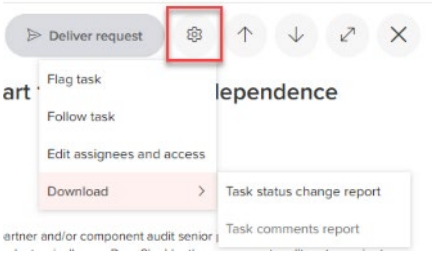


You can also manage access to multiple tasks on a Portal or project level (see below).

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7.4 Download task reports

There are various reports you can download on a task level.

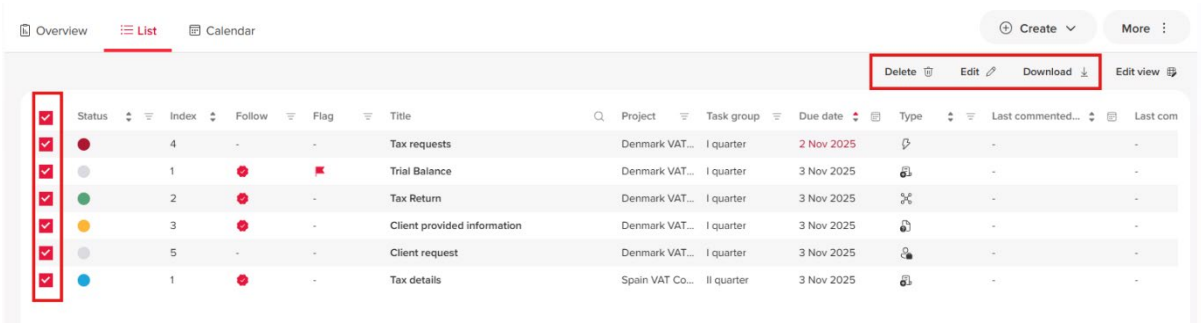


Click the gear icon in a task to download a *Task status change report* and a *Task comments report*. For Signing and Approval tasks there is an additional option *Signing/Approval logs*. In Survey tasks you can download the task in Excel and PDF format.

The **Task status change report** allows to track what and when happened with the task and who and when changed the task status. The **Task comments report** allows you to export comments on a task level. The **Task History Logs** report provides a detailed record of all changes made to a specific task.

7.4.1 Edit multiple tasks or download tasks' files and reports

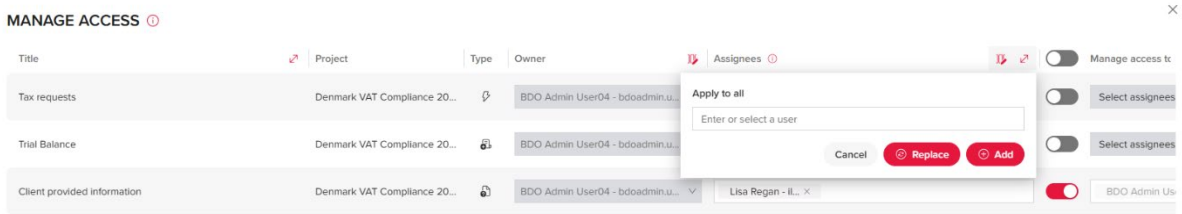
In **List** view, you can edit multiple tasks within one portal by simply selecting them. Once you have selected some tasks, the **Edit** and **Download** buttons will be enabled.



When one or more Client Request tasks are selected in the list view, the **Delete** button becomes active. Select it to remove the tasks. Deleted tasks are moved to the recycle bin and retained for 94 days. Only BDO Admins or users can permanently delete or restore them. Note that uou cannot delete any other types of tasks.

If you have *Client admin* or user permissions, under the **Edit** button you will see the **Manage access** and **Edit task details** options. Follow the instructions on the screen to add other members of your team to tasks as needed.

In the appearing **Manage access** dialog you can apply new assignees in bulk. In the **Assignees** column click on the red icon **Apply to all** and verify only users, who have access to all Portal projects, are shown in the drop-down list. Choose any client-side users from the list and click the **Add** button. Click **Replace** if you would like to override the previously assigned users. You can add BDO side assignees only to Client request tasks.

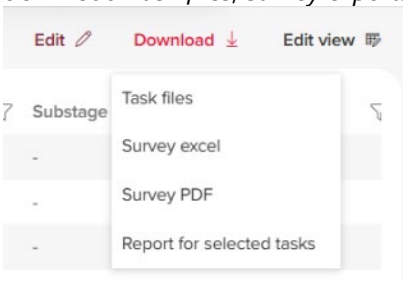


Enable or disable the toggle **Manage access to the task** to make the task restricted or unrestricted.

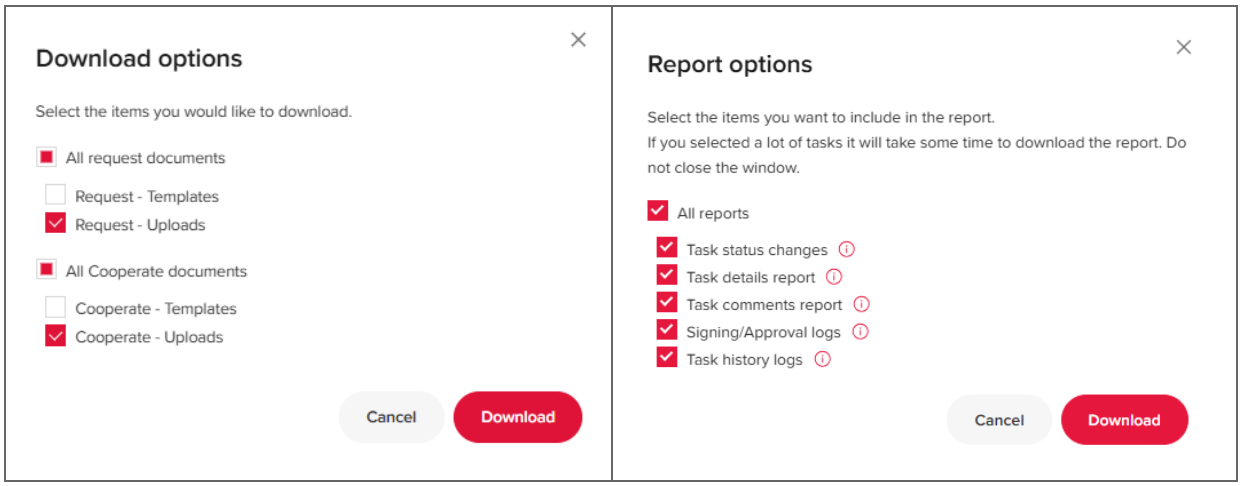
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If there are any Client request tasks selected in the list view, you can edit their details. Click **Edit** and select **Edit task details**. In the modal you can update all task information, except **Project**, **Start date** and **Other grouping**. Entity, Period end and Location can be selected from the dropdown only. Completed tasks cannot be edited.

The **Download** button that becomes active upon tasks selection, will provide you with options to download *Task files*, *Survey exports (Excel and PDF)* or available *Reports* for your tasks.



The **Task files** and **Report for selected tasks** options will display additional prompts to specify the content to be downloaded:

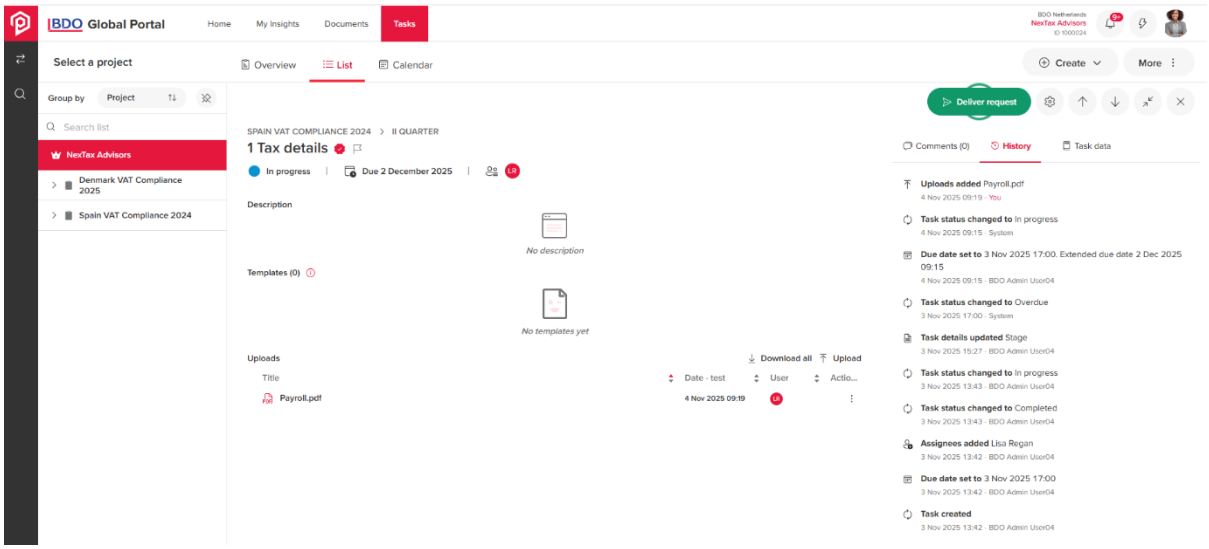


Apply your selections and a zipped file will start downloading. Please note that Survey tasks are not exported in zip files. To export survey results, select the corresponding options **Survey Excel** or **Survey PDF**.

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7.5 History logs

You can track changes for any task you have access to. To view the history, open the task overview page and select **History**. This section displays: when the task was created, who created it, and all subsequent changes—including updates to the due date, assignees, status, comments, files and other relevant details.



Logs "Comment added" and "Comment edited" are clickable. Click **Go to comment** to open comments section – the relevant comment will be highlighted.

If more than one assignee is added or removed, or more than one file is added or removed, you will the number of users or files next to the log. Click **Show details** to overview all of them.

You can also download the History logs report by clicking the gear icon in the task overview page, selecting **Download** and **Task history logs**.

7.6 Special task types: subject to additional configuration by BDO

7.6.1 Signing and Approval tasks

Note: The Signing task is available only where and integration with DocuSign has been implemented. The Approval task is used to get sign-off on draft documents without a signature, such as draft tax returns or audit reports.

When a BDO user needs to request a signature, they will add you as an assignee to a Signing task in Global Portal. The Approval task is used to get sign-off on draft documents without a signature, such as draft tax returns or audit reports. Signing tasks have integration with DocuSign while Approval tasks have similar functionality for approving documents without DocuSign integration.

As an assignee you will start following the task and will get notifications based on your notification preference (status changes, comments, etc.). If you are the first (or only) assignee of the task, you will receive an email notification indicating that this task is open. When the signing order is set, additional assignees receive an email notification when it is their turn to sign the document. They can simply click on **Go to task** in the email, which will redirect them to the task in Global Portal.

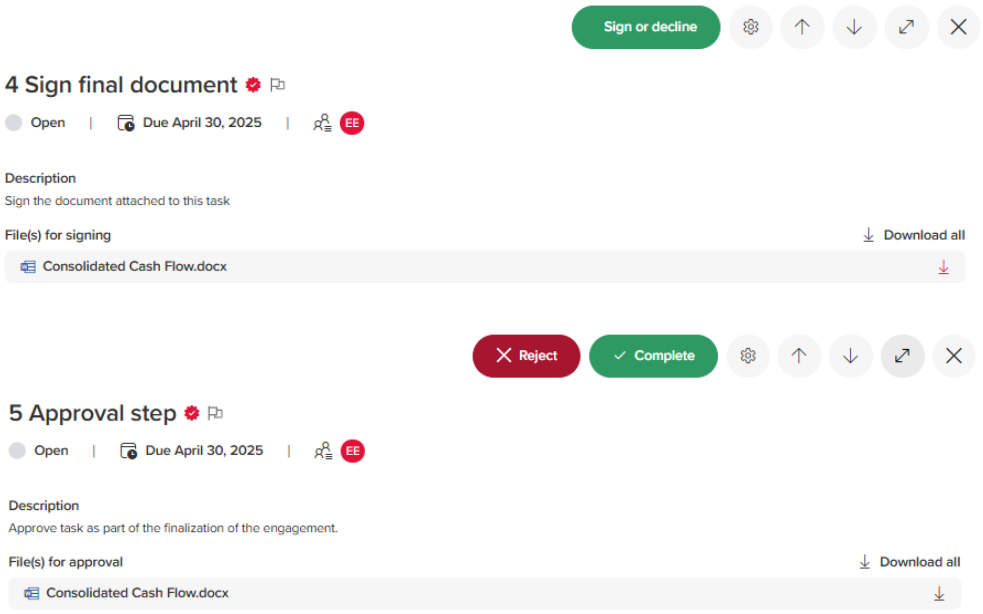
In addition to the email notification, you will also get a bell icon notification on Global Portal indicating that there is a signing task ready for signing.

When you go to the task, you will see the task overview page that gives you additional information on the signing task. You can hover over the people icon to see the ordered list. The Green Icon next to

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the name indicates, that assignees already signed the documents. You have the option to download the PDF file so you can review the document before signing the document in DocuSign.

To provide a signature or approval, go to Tasks, choose the project and open the Signing/Approval task you are assigned to. Review the documents and press the **Sign or Decline** button in a Signing task or the **Reject** and **Complete** buttons in an Approval task.

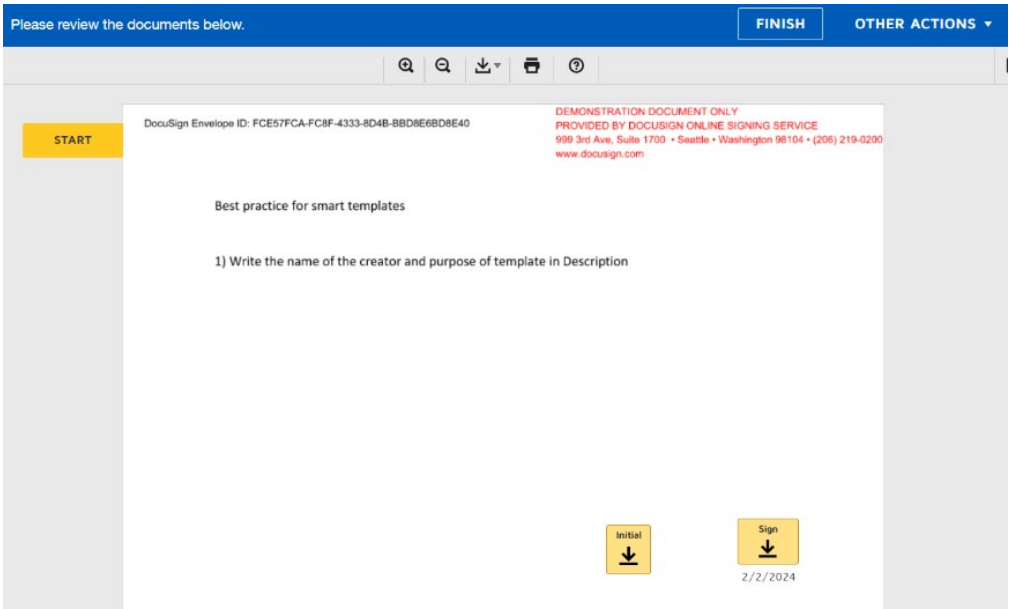


Please note that if you are on the ordered list and there are other assignees above you who have not signed the document yet, the **Sign or Decline** button will be greyed out with the message “Assignees prior to the current user have not signed or declined the task."

When it is your turn to sign the document, the **Sign or decline** button will become green.

Clicking on the **Sign or decline** button will give you the below notification which indicates that you will be taken into the DocuSign platform so you can sign the document.

Once you are in the DocuSign platform, you have the option to click on **Start** and the system will highlight the areas where you need to provide your initials and signature.



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Once everyone who is assigned signs the DocuSign document, the completed document can be found on the **Documents** page and in task overview page (in the File(s) section). This document cannot be edited.

Note: Approval tasks do not support signing order and can be signed at any time by each assignee.

7.6.2 Client request tasks

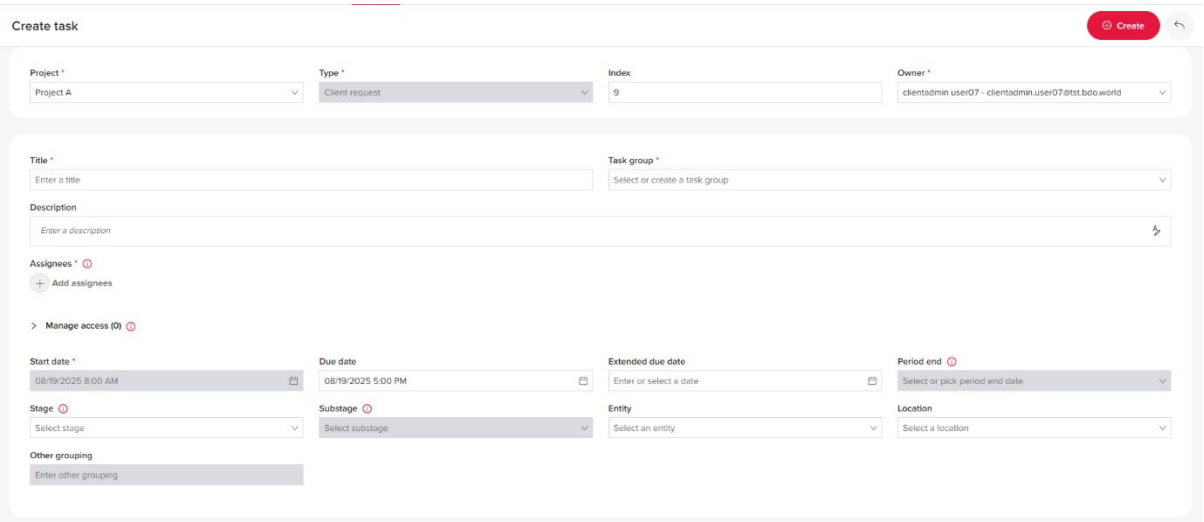
Note: If your BDO adviser has enabled the feature for client users to create "Client request" tasks, you will be able to see the "Create" button in the top right corner of the Tasks page. If the "Create" button is not visible, then this option is not available.

A Client request task can be created by a Client admin or a Client user. For client request tasks, the button **Deliver request** is always active, allowing you to deliver the task at any time, regardless of assignment status. If you are not the assigned user for a task, you can still deliver it. Upon delivery, you will be automatically added as the assignee. Once the task is delivered, the **Recall** task button replaces the **Deliver Request** button. Click it to change task status to in progress.

Upload the document to the **Uploads** section or add a comment to change task status to in progress.

7.6.2.1 Create Client request task

Client admins and users can create Client request tasks and even new task groups, provided permissions have been granted by BDO users. In the Tasks page click the button **Create** and select **Task**. Select any project and all other fields will be revealed for Client request.



There are following fields in task creation form:

- Project – can be selected any project where Client requests are allowed.
- Type – prefilled with Client request and not editable.
- Index – up to 10 symbols can be entered.
- Owner (mandatory) – prefilled with current user but can be changed to any other client or BDO user, except reader.
- Title (mandatory) - up to 225 characters can be entered
- Task group (mandatory) - can be selected from the dropdown list or newly created if it is allowed in the project. To create new group, enter unique group title and click the line Create: [task group].
- Description – formatting can be applied to the text entered in this field.
- Assignees (mandatory) - at least one BDO assignee must be added. Up to 20 users can be added as assignees.
- Manage access – task can be restricted and visible only for users who have access.
- Start date (mandatory) - prefilled with current date 8:00 AM and is not editable.

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- Due date – prefilled with current date 5:00 PM but can be changed or removed.
- Extended due date – empty by default but can be set later than due date,
- Period end – inactive.
- Stage – can be selected from the dropdown list.
- Substage – can be selected depending on Stage. If Stage is empty, Substage is inactive.
- Entity – can be selected from the dropdown list.
- Location – can be selected from the dropdown list.
- Other grouping – inactive.

Fill-in all mandatory fields and click the button **Create** on the top right corner to create the task. When the task is created, its overview page is displayed.

Upload the file (up to 2GB) to Client request by clicking the button **Upload** in the task overview page or drag and drop to the Uploads area. When file is uploaded, task status is changed to in progress. If due date is in the past, task status will be Overdue even if the file is uploaded.

Click the follow icon next to the task title or click **Options** icon and select **Follow task** to follow the task and receive notifications about it. Click the flag icon or click **Options** icon and select **Flag task** to mark the task as important.

7.6.2.2 Edit Client request task

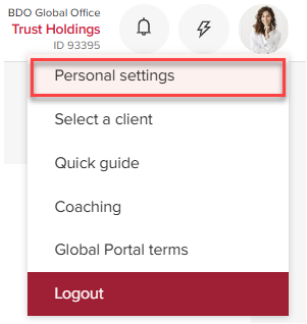
To edit a Client request task, click the **Options** icon and select **Edit task**. Please note that the following fields are not editable: Project, Type, Start Date, Period End, and Other Grouping. After making your changes, select Save in the upper-right corner.

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8. PERSONAL SETTINGS

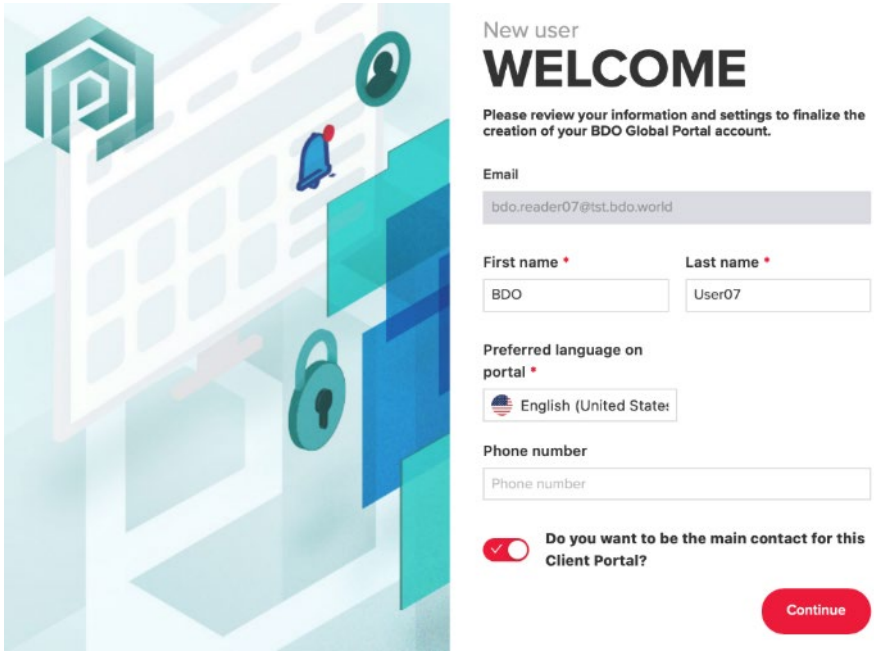
When logging in to Global Portal for the first time you will be prompted to set your personal preferences.

Tip: Leave the default selections on your first login. You can always edit these settings via the **Personal settings** menu, under the **Profile photo circle** icon.



8.1 Step 1 – Set my contacts

Please fill in your contact details and click **Continue**.



If you want to change your language settings, photo or contact details, go to the **Personal settings** page > **My profile**

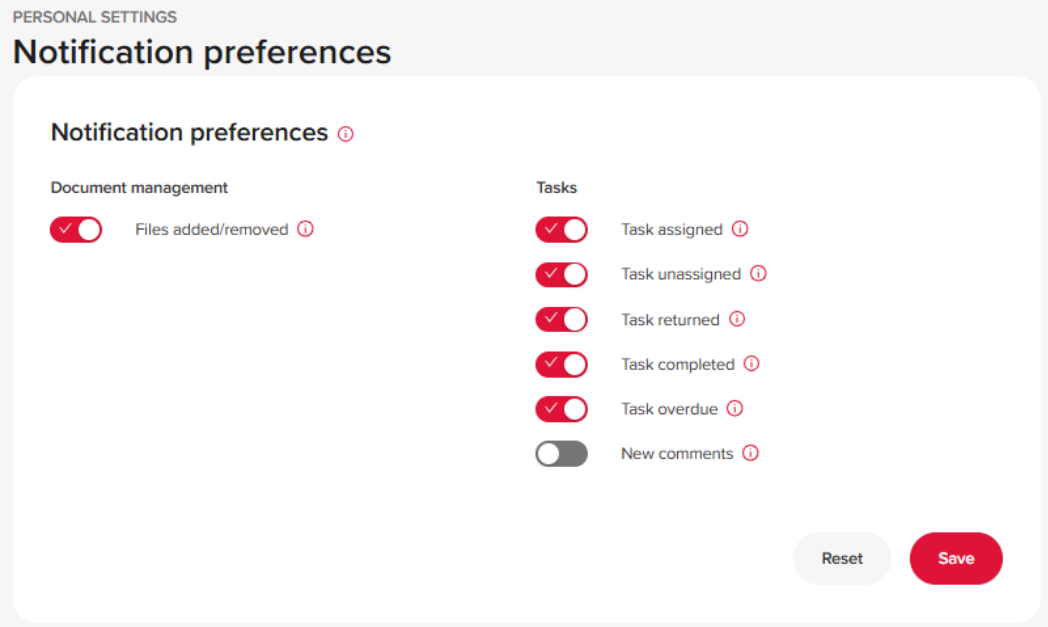
8.2 Step 2 – Set my Insight preferences

Set Insight Preferences on the second Welcome window. The default selection is for **All topics**. You can tailor the topics to your interests by toggling the options on the page.

The **Insights preferences** step is not mandatory and you can skip it by clicking the **Skip** button on the bottom right corner.

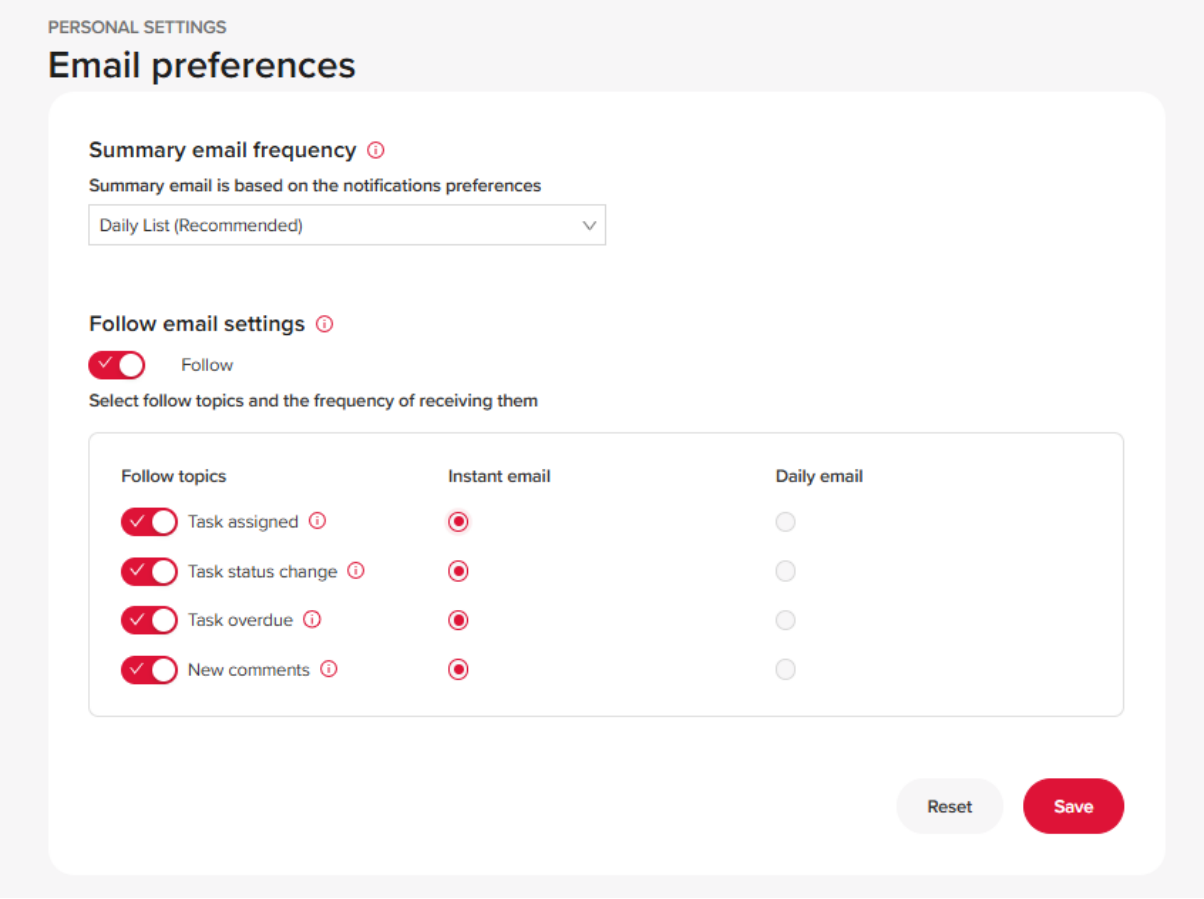
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8.3 Step 3 – Set my Notification preferences



New users can set **Notification preferences** on their first login or later via the **Personal settings** menu under the **Profile photo circle** icon.

8.4 Step 4 – Set my Email preferences



Select the frequency of summary emails you receive from Global Portal. We recommend selecting the

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“Daily List” option to receive a list of all your notifications. This can help you track tasks and activities on your projects.

The **Follow** toggle enables you to receive email notifications (**Instant email**) for every status change on tasks you choose to follow. If you prefer to receive summary emails once daily, select the corresponding radio button under **Daily email**.

If you wish to edit your **Email preferences** later, open the **Personal settings** menu under the **Profile photo circle** icon.

8.5 Global Portal Terms

The first time you sign in or whenever the Global Portal Terms are updated, you’re required to review and accept them. You can find the **Global Portal Terms** menu under the **Profile photo circle** icon.

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9. TEAM MANAGEMENT FOR CLIENT ADMINISTRATORS

The roles Client users can have in Global Portal and their permissions are as follows:

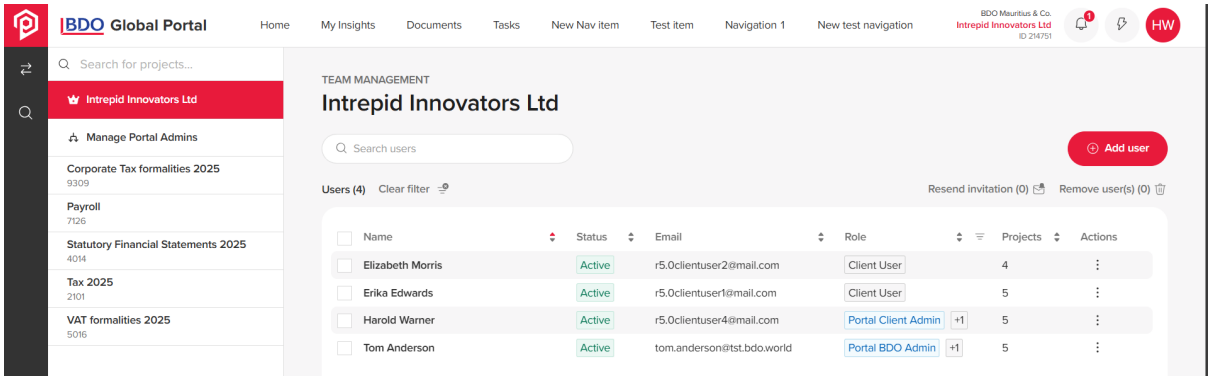
Role	Team management	Assign tasks	Level
Portal Client Admin	✓	✓	Portal
Client Admin User	✓	✓	Project
Client User	✗	✓	Project
Client Reader	✗	✗	Project

Please note that the **Portal Client Admin** role has access to all projects under a portal. Portal Client Admins cannot upload deliverables or complete tasks, unless they are assignees, but they can view tasks and files in Tasks and edit files in the Documents library.

9.1 Team management page

Click the **Team management** option under the lightning bolt icon  to load the page for managing access for users from your organization.

If you act as a Portal Client Admin or Client Project Admin on a portal or project level respectively, you can add/remove users to/from all the groups you see in **Team management**. Click the three dots under **Actions** to review/edit existing users or add new ones via the red **Add user** button.



If you are adding an existing user to a new project, their email address will appear as a drop-down menu, when you enter the **Add user** field. If you need to add a brand-new user, click the red **Invite new user** link and enter their details. Don't forget to click the **Add** button to finish the process.



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Please note that adjustments to project permissions require time to apply fully and may not be reflected immediately.

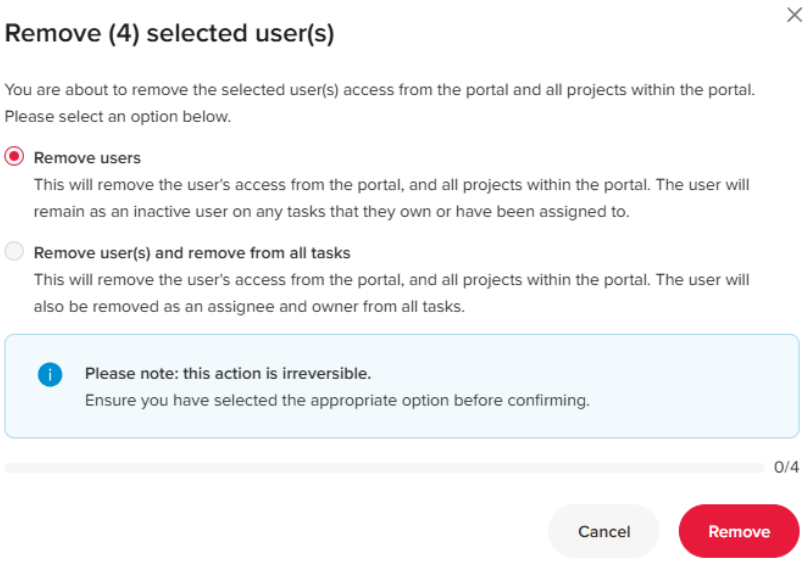
9.2 Managing multiple users

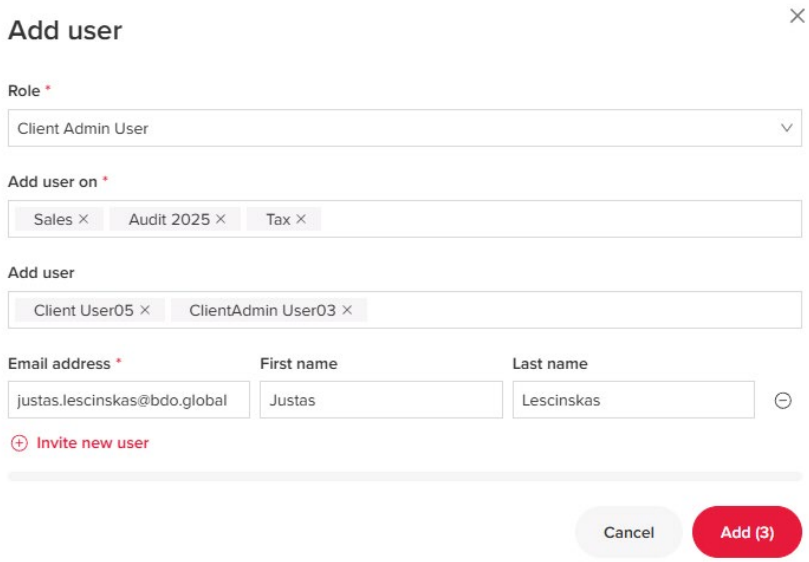
Select the **portal name** (marked by the crown icon) to open the multiple user management section. To add users:

1. Click **Add user**
2. Select an available role to assign (based on existing permissions)
3. Select available projects (based on the currently logged-in user's project access)
4. Select users to add or invite
5. Click **Add**

To remove users:

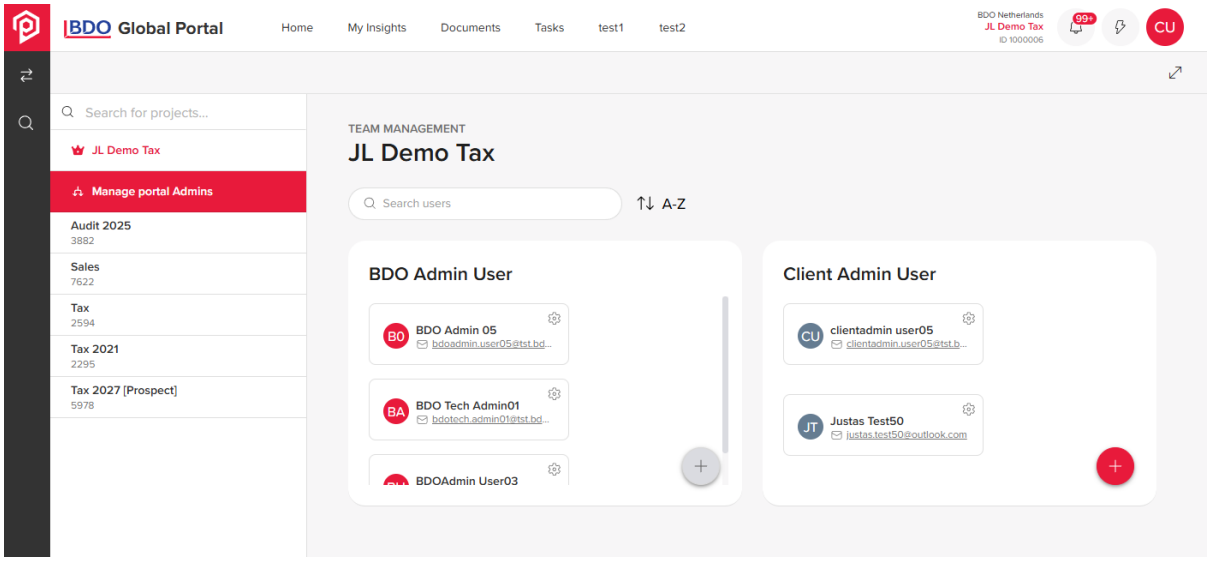
1. Select users to remove (based on existing permissions)
2. Click **Remove users**
3. Choose whether the users should be removed from the project only or removed from both the project and their associated tasks





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9.3 Portal team management

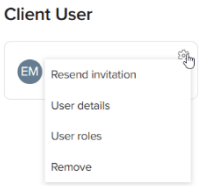


If you are added as a **Portal level** Client Admin (Portal Client Admin), you have access to the **Manage Portal Admins** menu and to all projects under this portal.

On the same page Portal Client Admin users can also see users from the BDO Admin user group, but they can't make changes to the group.

9.4 Project team management

If you prefer to manage users on a project level, click on a project name and use the red **plus icons** to **add** users to each role. Click the gear icon on a user's name card to view additional actions and the **Remove** option.



10. NEED FURTHER ASSISTANCE?

If you require further support to ensure the best possible Global Portal experience, please reach out to your BDO contact.

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