PBC/EXCHANGE USER MANUAL

Client Guidance (Release 3.3)
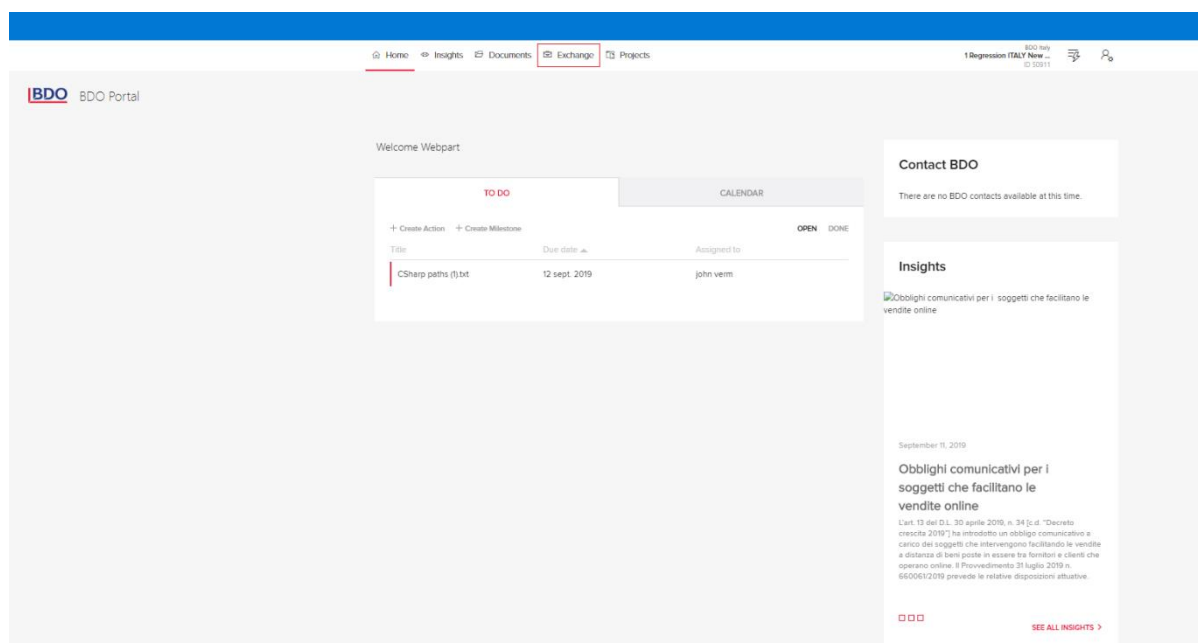
September 2019

BDO

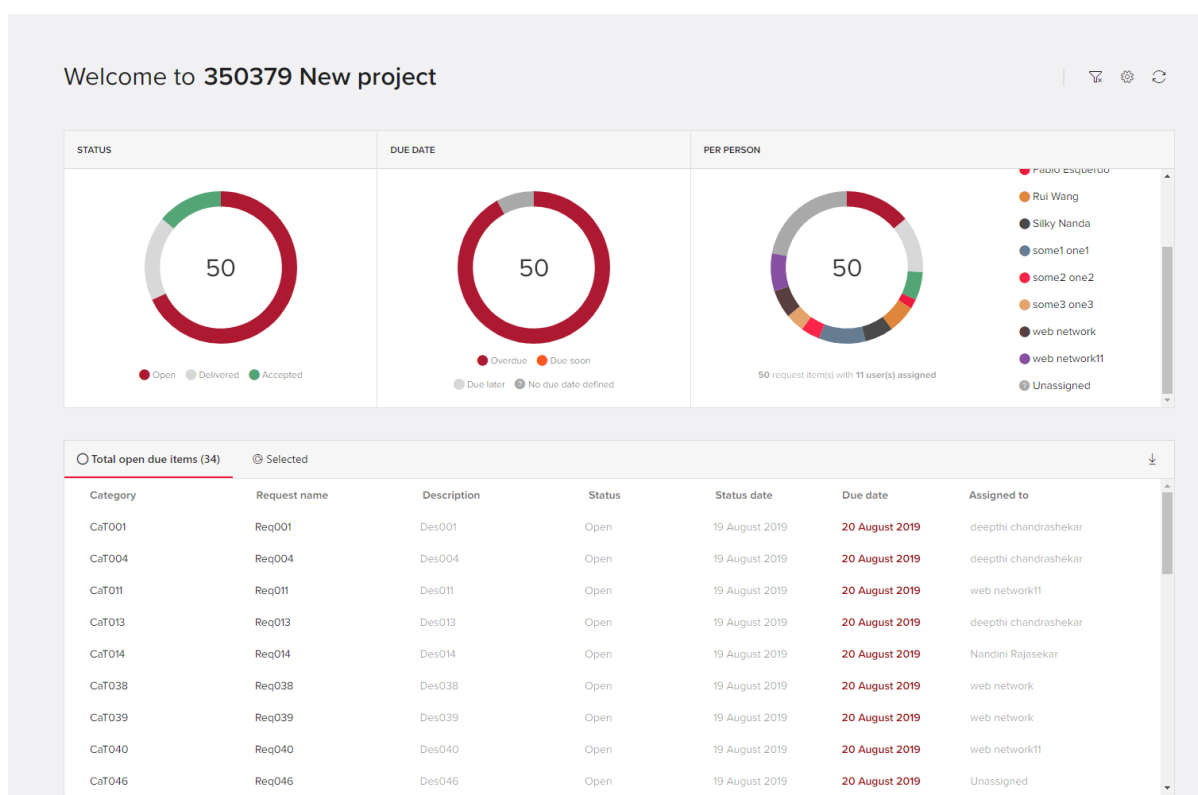# CONTENTS

1. OPEN THE EXCHANGE APP AS A CLIENT USER

Log in to the BDO Portal and click on Exchange

You will be sent to the Exchange overview page

2. EXCHANGE OVERVIEW PAGE

The page shows the following:

- A welcome text
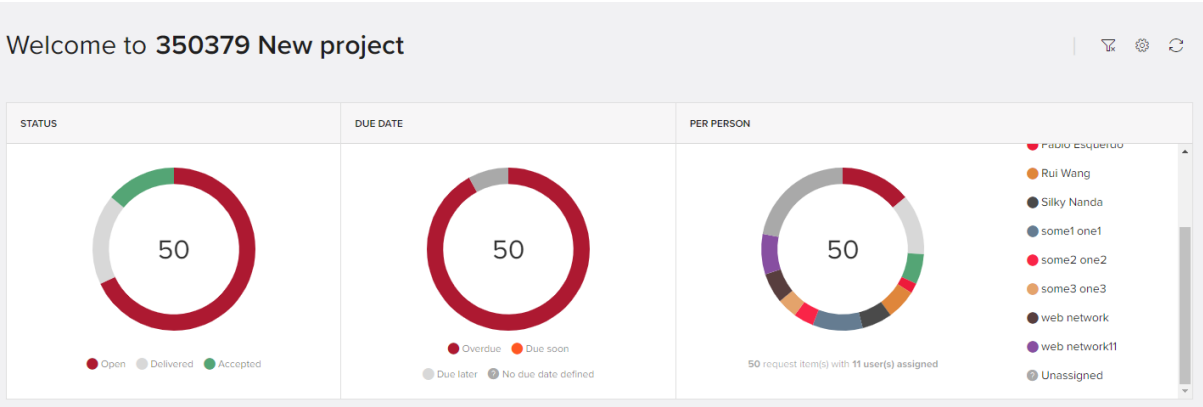
- A quick access view showing list of all open request items along with count "Total open due Items". list will also show following Category, request name , Description , Status , Status date , Due date and Assigned to.

- "Selected " tab is also present in order to show rows selected , Below example show wherein Open form STATUS doughnut is selected and Selected Tab have qualified result , Explained in more details in Dashboard section.
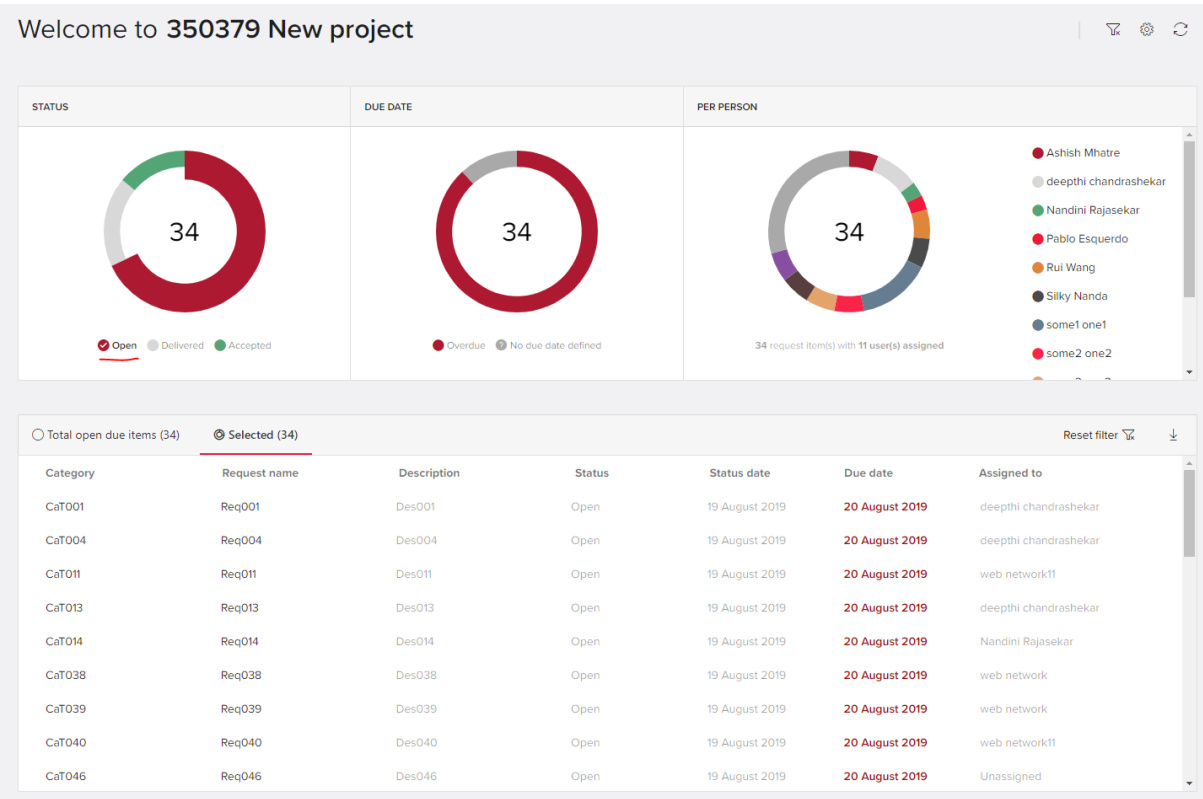
- Dashboards showing a visualisation of the workflow and status of items. The dashboards can be accessed at any time by clicking the Home icon
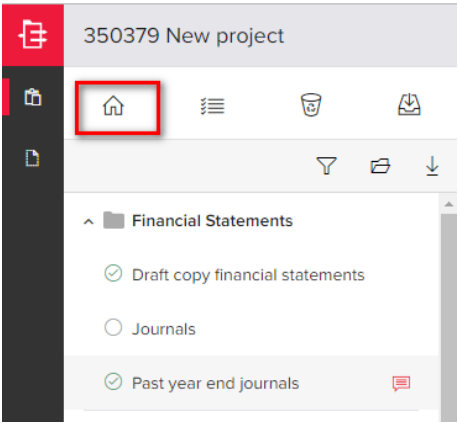
See the Dashboard section of this document.

3. REQUEST ITEM LIST

The request item list will contain individual request items grouped into categories. To see the request items within a category, click on the downward arrow to the left of the category name.
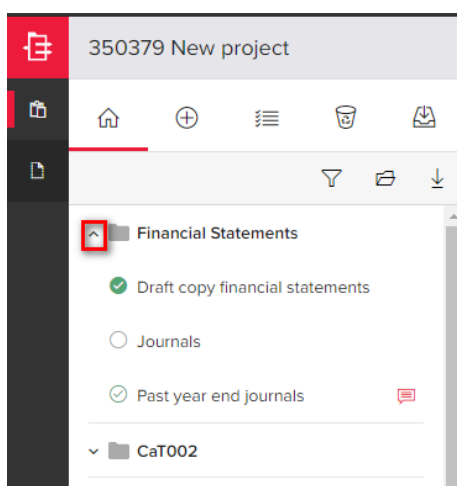
To view the details of a request item, click on the name of the request item and the details will show to the right.
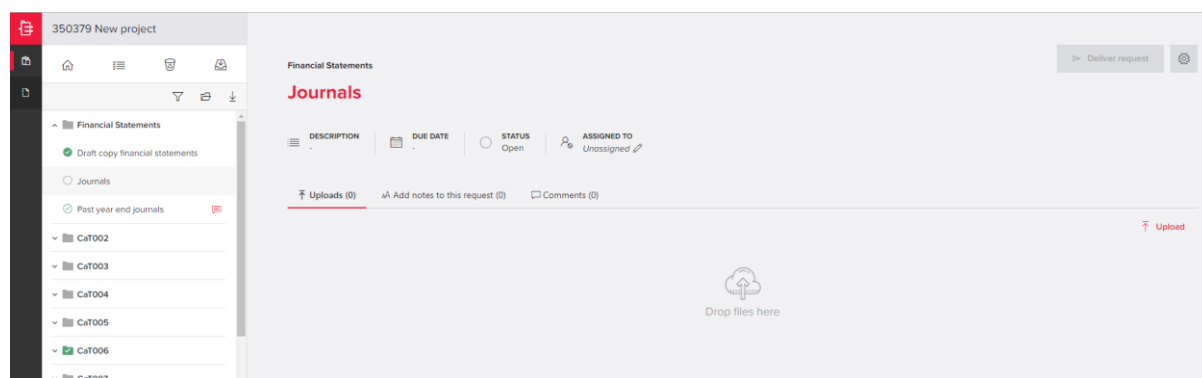
An attachment may have been added by BDO to a Exchange request by dragging or upload option.To download the attachment, click on the menu to the right of the attachment.
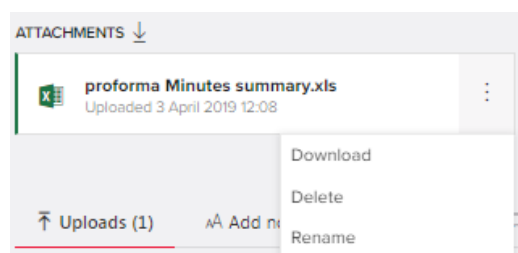
4. ABILITY TO ASSIGN REQUEST ITEMS

Clients can now assign a request to one of their team.   This information will be used in the dashboard functionality as well as in the filters on the request listing – where client users can see what has been assigned to them. Unless an item is restricted, any client team member can access, read and satisfy a request, even if it is not assigned to them.

To assign a request, click on the specific request item to go to the detail view then click on the pencil icon to edit the item. Then, go to the Assigned To field (blank by default) and select the relevant team member. To save the assignment, click on the Save icon.
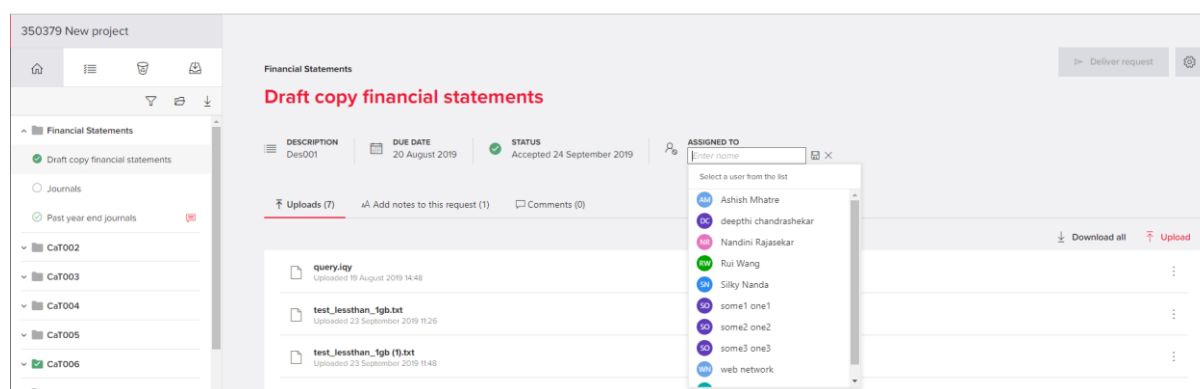
As well as assigning individual items, the client can also 'deliver' more than one request at a time to BDO.

From the multiple request icon, select Assign multiple requests
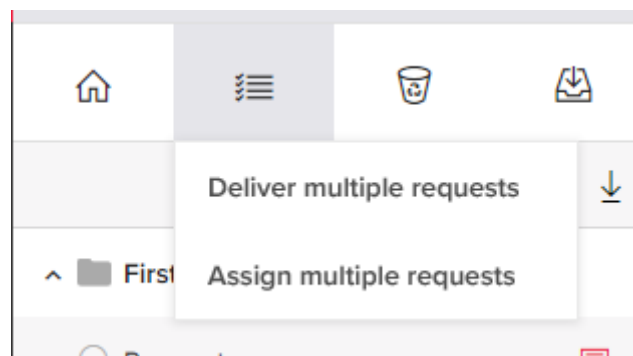
In the request item list, tick the items that needs to be Assigned. These will show in the main screen to the right of the request item list

Assign the requests – this can be done either to the same person, using the button or to different individuals by clicking in the assigned to field.

Once the assignments have been made, press Save. While the changes are being

processed, an icon will show. Once the assignments have been saved, a will show to the right of the name

Note that a client user can preview Name, Category and Description of requests by clicking on the columns in the Multi assign screen. Values in these columns are not editable.

5. ABILITY TO RESTRICT ACCESS TO A REQUEST ITEM

A Client Admin can restrict access to a Request Item so that sensitive information is only visible to the right people.

NOTE: BDO Users always have access to any request, regardless of the restriction. Restrictions only applies to client users.

Only a **Client Admin** user can initiate the restriction of access. More than one user can be granted access to the relevant item.   For those items where access is restricted, only those who have been given access can view the request. Restricted access is given on an item by item basis.

Changing the restriction of a request

- As a **Client Admin** user: go to 'Restrict access' using the [gear icon] icon within the request item and select Manage access.

Select Assign Access and select at least one person from the list. There is no restriction as to the number of people to whom access can be given to a specific item

When the access restriction is set up/saved, the following message is received:

Your **Draft copy financial statements** is a restricted request now, you can change the access settings by clicking on the button manage access again.

If there is a problem, the following message is received:

Unable to change the restriction on the request. Please refresh your page.

When restricting access to a request item, the client admin by default has access. This can be removed (as long as at least one other person has been granted access) by clicking on the [X] next to the name and pressing Save. A confirmation message will show:

If you choose to continue, you will be taken back to the Exchange overview page and will not have access to the request item anymore.
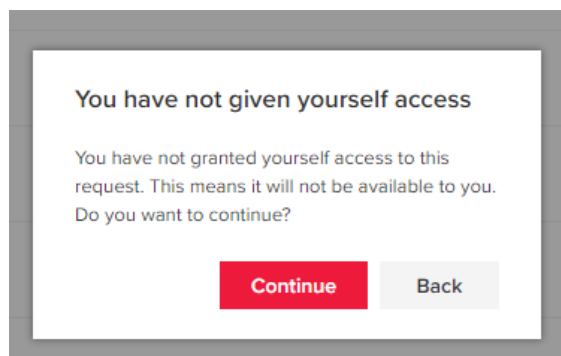
To show the user that access to a request item is restricted, an indicator is shown next to the request title in the list and right next to the request title in the detail page.
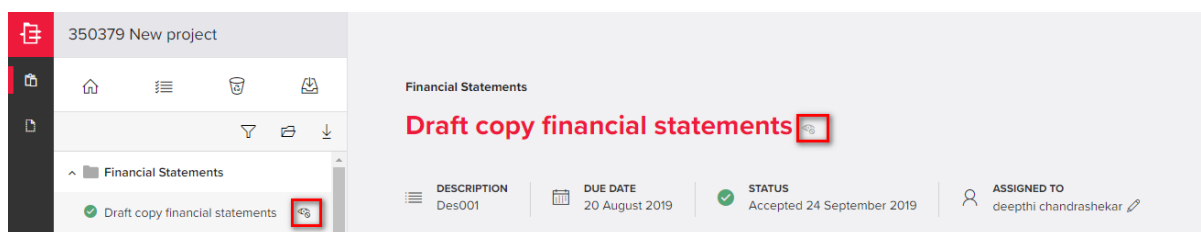
6. UPLOAD DOCUMENTS AS A RESPONSE TO A REQUEST AND DELETE/DOWNLOAD THOSE DOCUMENTS

- A client can add documents against an individual request in the detail view panel by clicking on upload or by using drag and drop.
- The maximum individual file size is less than1GB
- To download or delete a document, click on the three dots to the right of the document name.
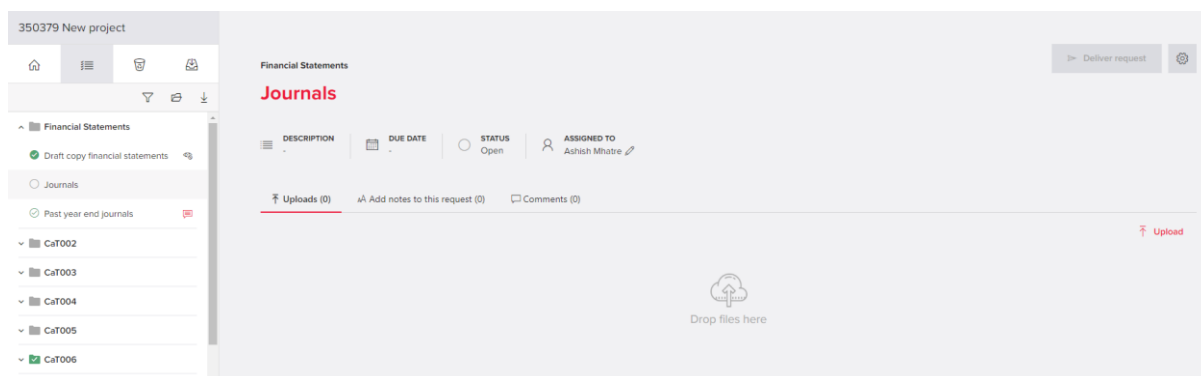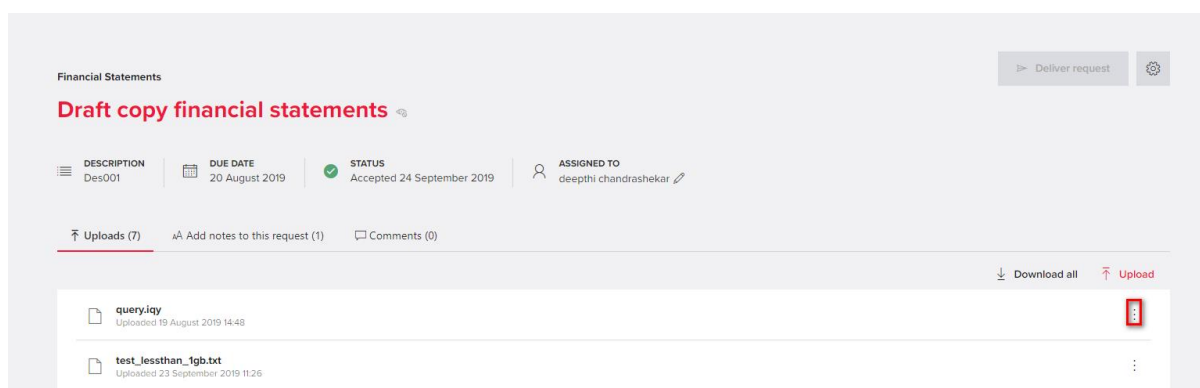
File drop panel

- A File drop panel has been provided as a landing stage to allow clients to upload all documents/folders to one place and then for either the client or a BDO team member to put them against the relevant request.
- To access the file drop panel, click on the drop file button in the top left navigation, clicking on it again will close the file drop.
- The file drop shows an overview of all documents that a client has uploaded that are not linked to a request item. On this screen documents can be added, downloaded or removed
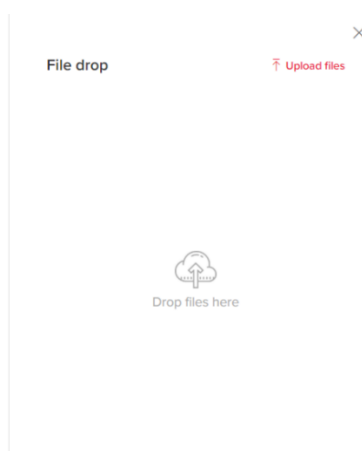- The screenshot below is of the file drop when there are no documents uploaded that have not yet been assigned to a request

Documents can be added to the file drop by using the 'Upload files' button, or by dragging one or multiple files onto the screen. The screen will then show the grey outline.
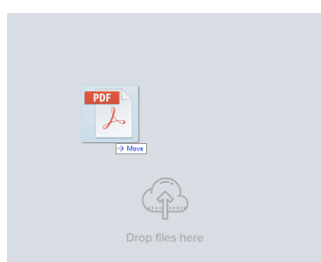
Files that are either dragged in or added via the file upload will first be shown in a waiting state. After the first file upload is completed , it will process the second and same for the rest.
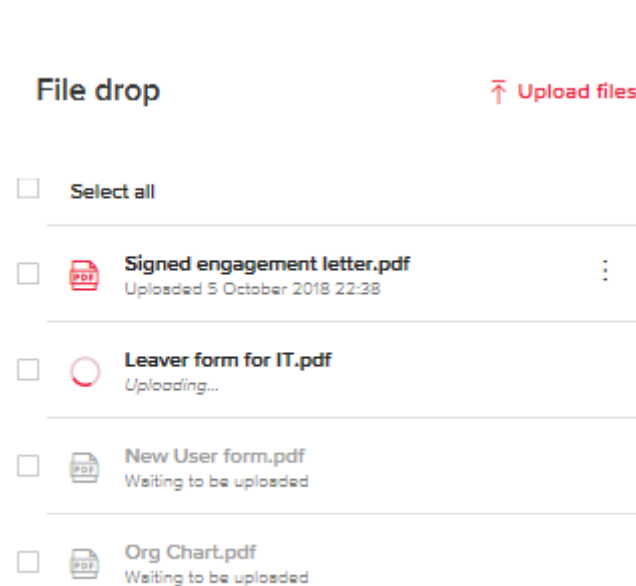
Folder upload in File Drop

Folders can be uploaded to file drop by clicking the "**upload**" button in the uploads section. The upload button gives the option to upload files and folder.

Uploading folders can also be done by dragging and dropping the folders in the uploads section (not supported for IE).
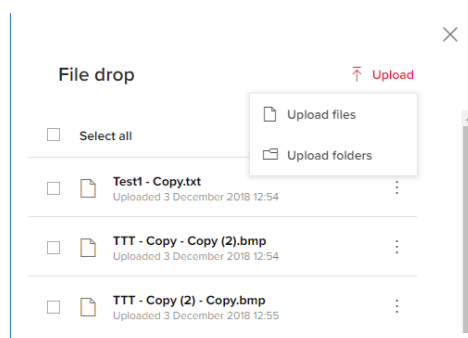
The folder once uploaded can be viewed in the uploads section.

The contents of the folder (files and subfolders) can be viewed by clicking the expand icon at the right end of the document row.

Deleting a file or folder in file drop

The folder or the files in the folder can be deleted by clicking the 3-dot menu at the right end of the document row and selecting "**delete**".
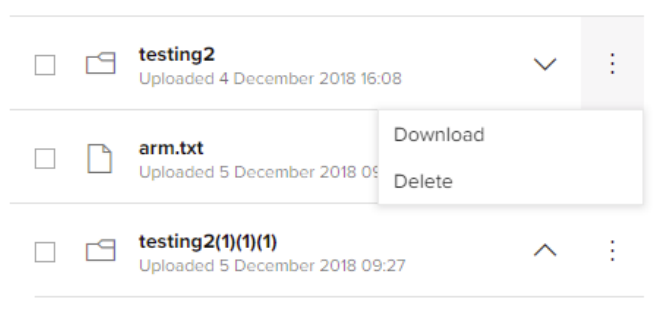
The deleted folder or the deleted files from a folder can be seen in the "**Recently deleted**" tab.
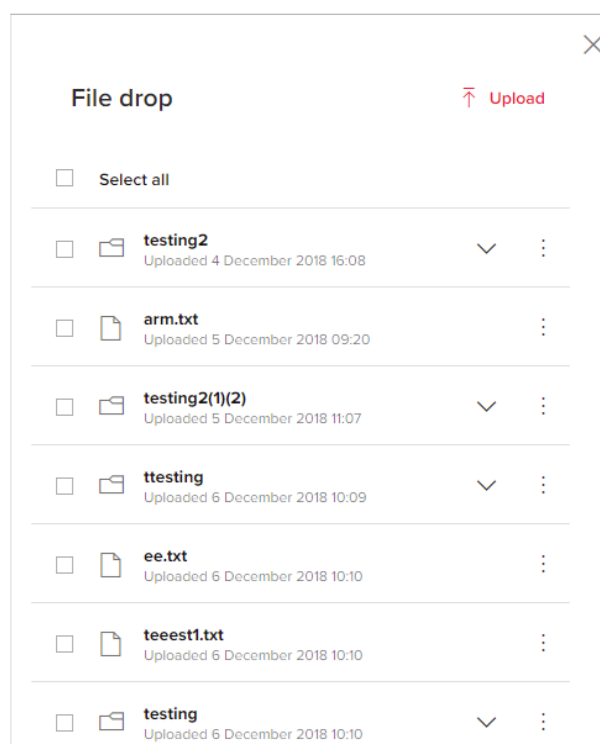
Restore file or folder to file drop

A deleted folder can be restored back to the file drop from the recently deleted tab. This can be done by clicking the "**restore**" option from the 3-dot menu at the right end of the deleted item row.

Recently deleted ⓘ

| Type	Name	Date	Options
📄	Master Test Plan PBC.DOCX	Deleted **recently** from **req005** in **cat005**	⋮
○	REQ1074	Deleted **4 hours ago**	Restore

Restoring a deleted folder will restore all the contents (including files and sub folders) in the folder.
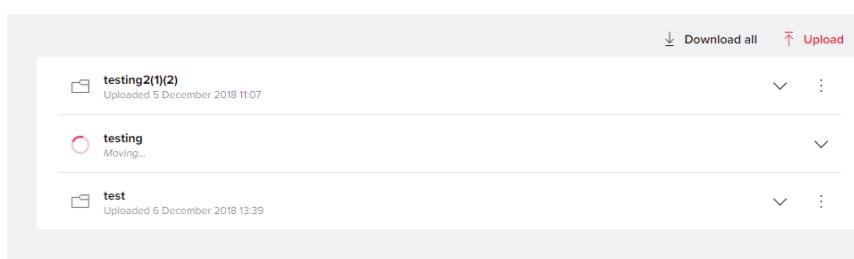
Failure to restore

If a file or folder restore fails, an error message is shown:

> ⊘ Unable to restore file. Possibly its parent has been deleted as well.
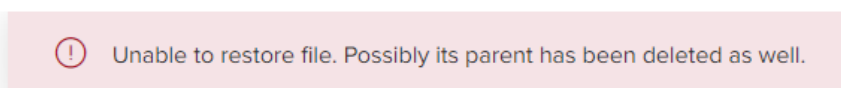
The restored file or folder will be put back to the same location from where it was initially deleted.

Move folders from file drop to Request Item

A single file, folder or multiple folders can be moved from the file drop to a request item via drag and drop.

|		⭳ Download all	⭱ Upload
📁	testing2(1)(2) Uploaded 5 December 2018 11:07	⌄	⋮
○	testing *Moving...*	⌄	
📁	test Uploaded 6 December 2018 13:39	⌄	⋮

7.   UPLOADING A FOLDER TO SATISFY A REQUEST

A user can satisfy a request by uploading a folder – this is in addition to being able to satisfy a request by uploading one or more documents.

To upload a folder, navigate to the Request Item's detail panel, select file uploads, then 'Upload', and then 'Upload folders':
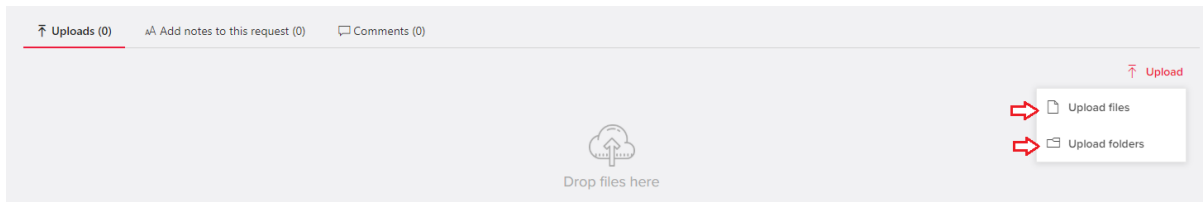
- Browse to the required folder to be uploaded and click 'Select folder '.
- The folder with its content appears in the list of uploads
- A user can add more than one folder by dragging and dropping them into the upload area (expect IE see below Known issues)

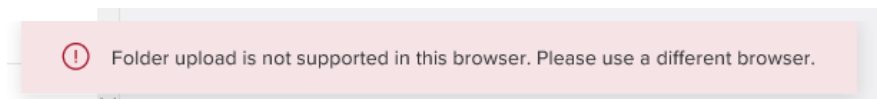An uploaded folder/file can be downloaded by using the 'Download' option from the menu
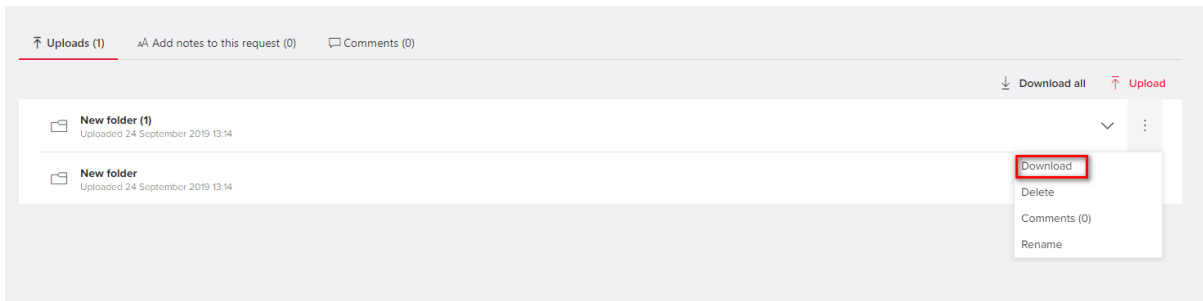
KNOWN ISSUES: FOLDER UPLOAD

Use of browsers

Folders cannot be uploaded when using Internet Explorer. This functionality is available when using Chrome, Firefox and Edge

In IE below is thrown

Folder hierarchy

It is possible to upload a folder with a 'hierarchy' of 10 subfolders as illustrated below. If the folder has more than this, then the folder upload will fail (as shown in the screenshot below)
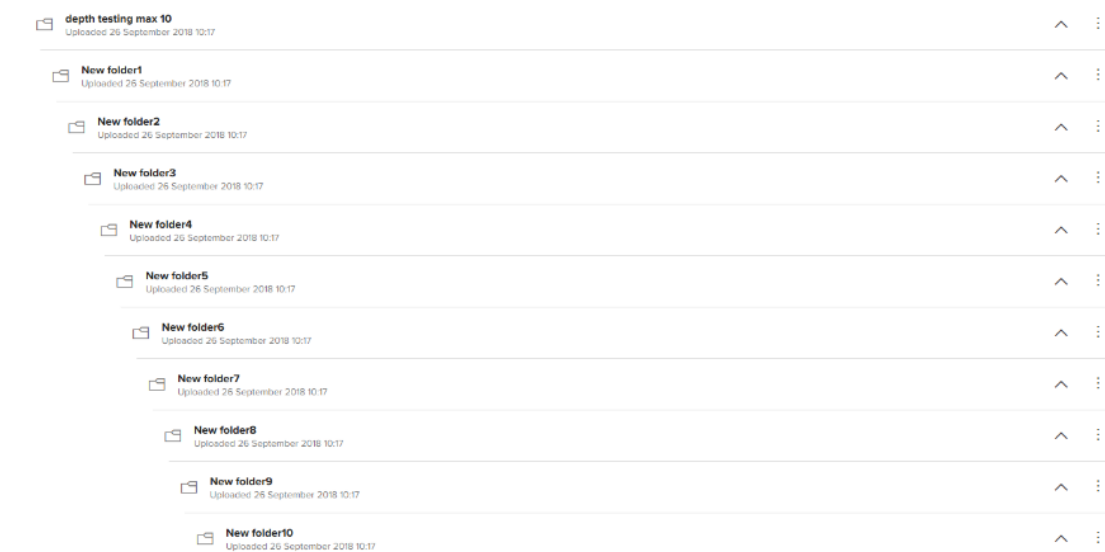
For example:

\folder - level 1

\folder\Accounting – level 2

\folder\Accounting\sheets\ - level 3…. etc. up to level 10

NOTE: there are some limitations on the folders upload:
- It is possible to upload a folder with max 10 subfolders.

depth testing max 10
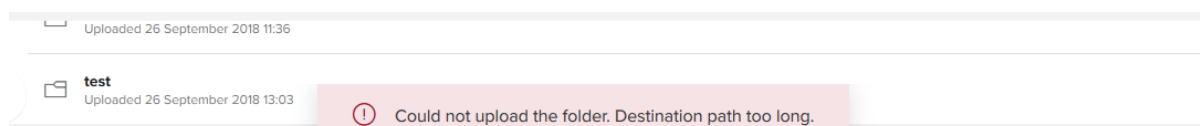Uploaded 26 September 2018 10:17

New folder1
Uploaded 26 September 2018 10:17

New folder2
Uploaded 26 September 2018 10:17

New folder3
Uploaded 26 September 2018 10:17

New folder4
Uploaded 26 September 2018 10:17

New folder5
Uploaded 26 September 2018 10:17

New folder6
Uploaded 26 September 2018 10:17

New folder7
Uploaded 26 September 2018 10:17

New folder8
Uploaded 26 September 2018 10:17

New folder9
Uploaded 26 September 2018 10:17

New folder10
Uploaded 26 September 2018 10:17

On attempt to upload a folder with more than 10 subfolders, a snackbar is displayed.

New folder1
Uploaded 26 September

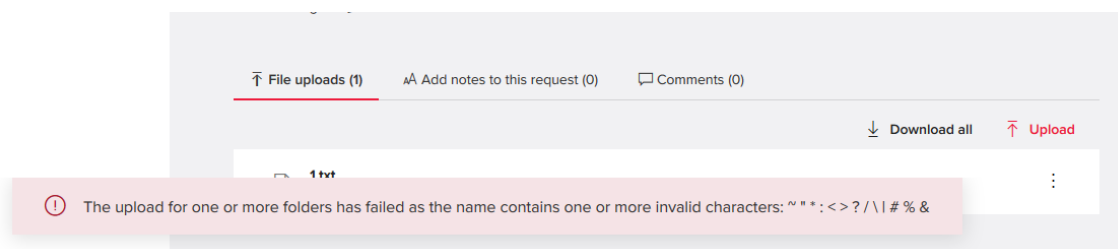⊘ Could not upload the folder. Maximum folder depth is 10 nested folders deep.

Folder naming: Length of name

The folder name must not exceed 255 characters. This includes its underlying 'ID', which includes the SharePoint URL.   Therefore, it is possible, where the folder name itself is long or there is a 'deep' hierarchy, that the folder name will exceed 255 characters and then the upload will fail, as shown in the screenshot below.

Uploaded 26 September 2018 11:36

test
Uploaded 26 September 2018 13:03

⊘ Could not upload the folder. Destination path too long.

Folder naming: invalid characters

If a user uploads a folder whose name includes an invalid character such as #$*' # % * : ' ' ? then the upload of the folder will fail. The user will get a warning as per below screenshot. To upload the folder to the Exchange, the name will need to be changed to not include an invalid character

⤒ File uploads (1)   ᴀA Add notes to this request (0)   ▢ Comments (0)

↓ Download all   ⤒ Upload

1.txt

⊘ The upload for one or more folders has failed as the name contains one or more invalid characters: ~ " * : < > ? / \ | # % &

# 8. RENAMING AN ALREADY UPLOADED DOCUMENT OR FOLDER

To rename an already uploaded document, select the document from the details panel (or file drop) and choose 'Rename' from the ⋮ menu
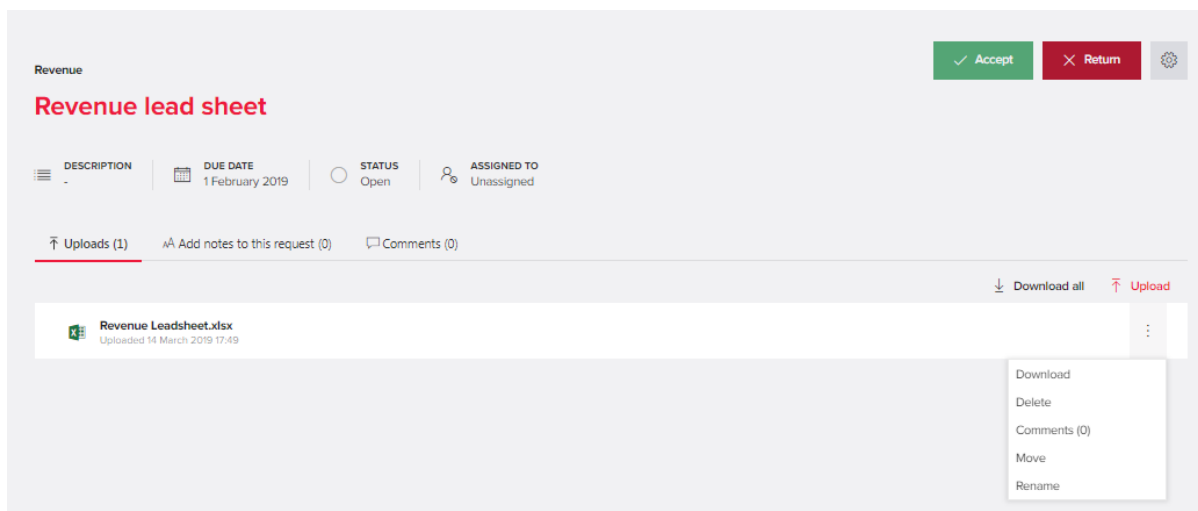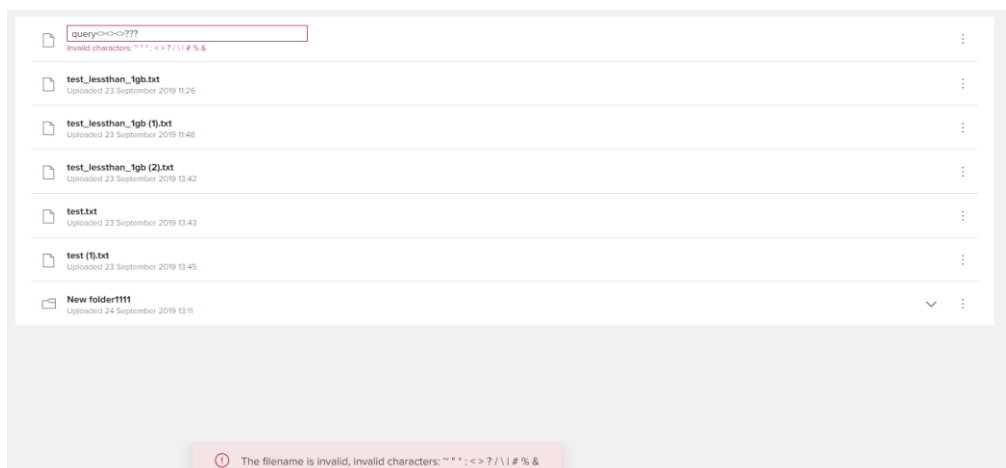

Once 'Rename' is selected, the name label becomes editable. To save any changes, press enter or click outside of the text box. Renaming can be cancelled by pressing Esc.

If user enters text that exceeds the character limit, an error message will be received, and the changes will not be saved.
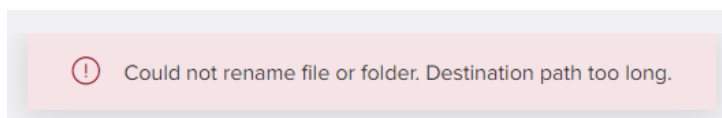
If user renames a file with invalid characters error message is thrown

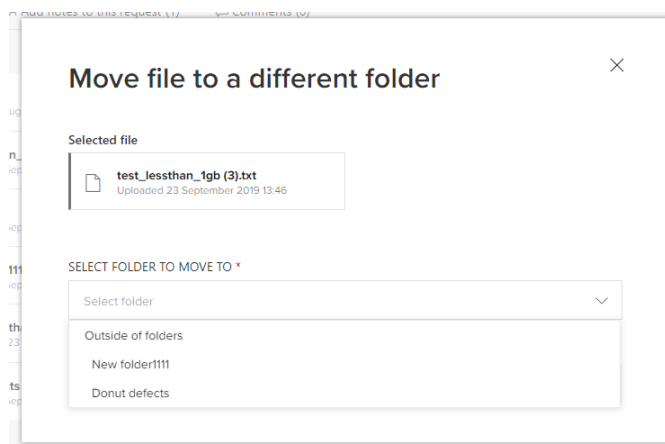The same functionality can be used to rename a folder.

9. MOVING FILES WITHIN A FOLDER

Users will be able to move files between folders that have been uploaded to the same request

Expand the folders > click on the 3 dots of the files > select move
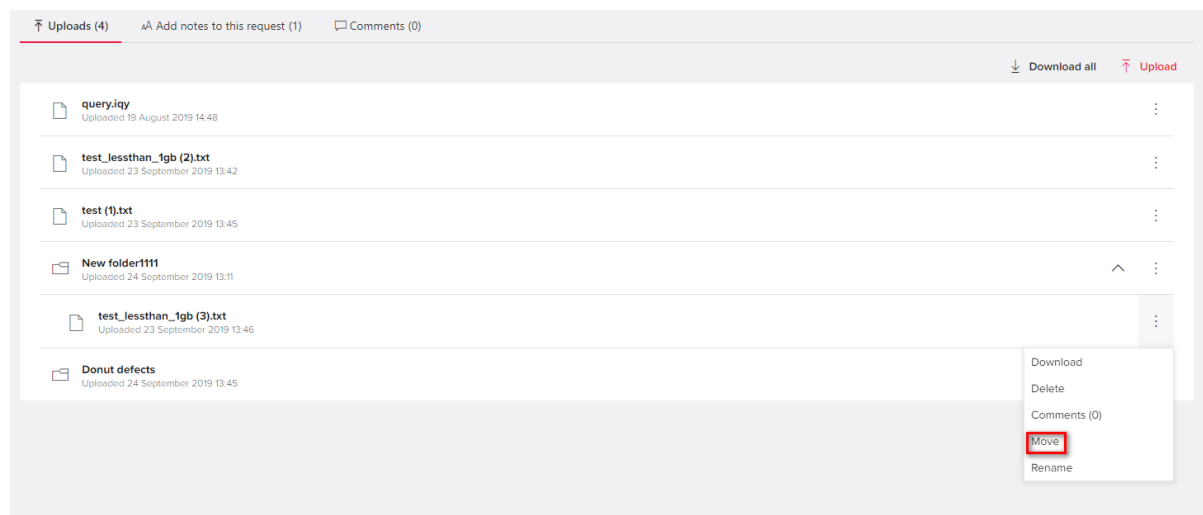
Select the 'destination folder to where you want to move the files - the file will be moved upon selecting the location
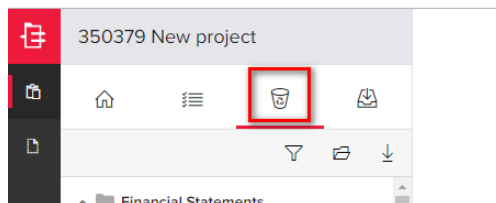

10. RESTORING DOCUMENTS

Client users can restore deleted documents from the Recently Deleted tab.

Matters to note include:

- The items deleted most recently are shown first
- The date the item was deleted is also shown
- A user can restore a single document which is not inside a request

- A user cannot restore a single document, which is inside a deleted folder. The whole folder will need to be restored

11.   DELETING AND RESTORING FOLDERS

A folder, complete with contents can be deleted by choosing 'Delete' from the   menu.
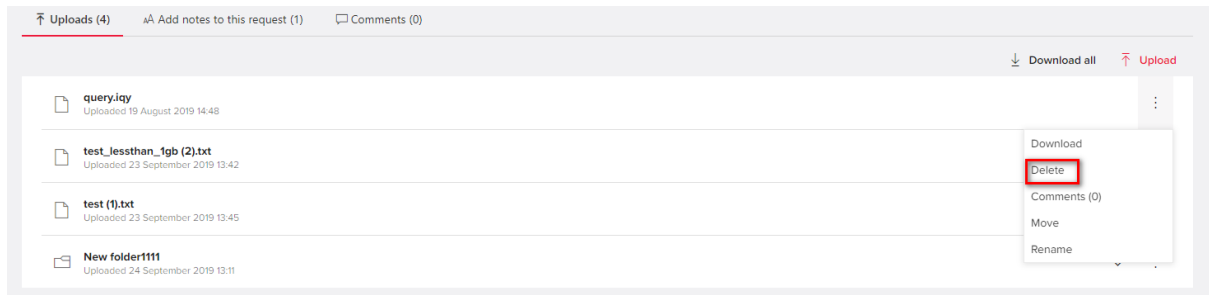
Folders will be able to be restored from the recycle bin back to the original request

Client users can restore deleted folders from the Recently Deleted tab

- The items deleted most recently are shown first

- if you restore folder, all deleted sub-folders and files are restored as well
- User can only restore deleted folder with all its content, not part of it
- User can restore folder to its original location
- Client can restore their own deleted folders (does not apply to newly created projects)
- When restoring a document or folder, the attached request item goes back to 'Open'

12. ADDING NOTES TO A REQUEST

Any user can provide a note to any Request item. This can be used to provide further information about the request to help the client provide the correct information.

A note can be added to the request by choosing the 'Add notes to this request' tab.

Type the note in the add notes to this request' field and press 'Save note' button. You will then see the note added as a .txt file, with an auto-generated name in a format

"Note - YYYY-MM-DD - 'your Client user name'.txt"
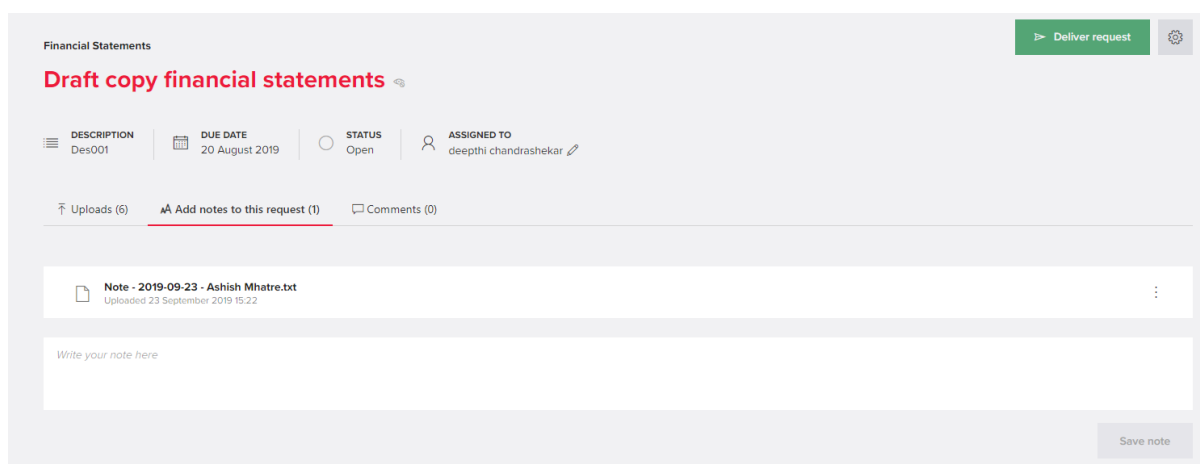
Use the three vertical dots menu on the right side near the provided notes to download, delete ,add comment and Rename the txt file containing the note.
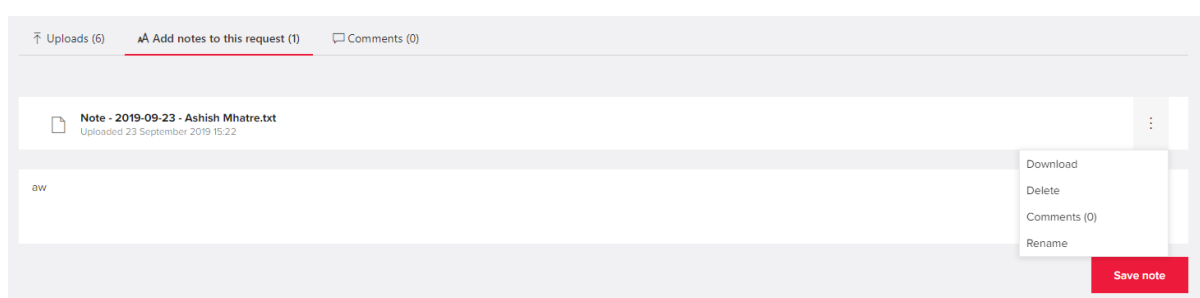
The downloaded note will be provided in notepad with original text. The .txt file can also be saved outside of the Exchange by selecting 'Download' from the menu

Note, it depends on the browser as to how the system provides a selection to review/save/cancel the download of the note.

Selecting 'Delete' will also remove the note from list. Once you have selected delete, you will be asked to confirm the attempt to delete the note:
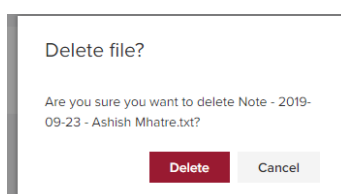
Click 'Delete' to confirm the deletion or click the 'Cancel' button to return to the previous screen, the txt file in this case will not be deleted. The note text file will show in the 'Recently deleted' tab for 90 days.

Click on comments will add comment to the note
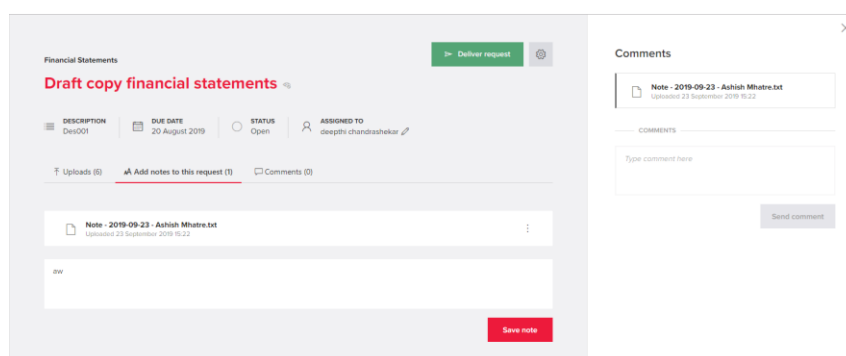
Enter your comment in Type comment here on RHS and click Send comment, once the comment is added a bell icon is shown , clicking on the same the comment section will open on RHS
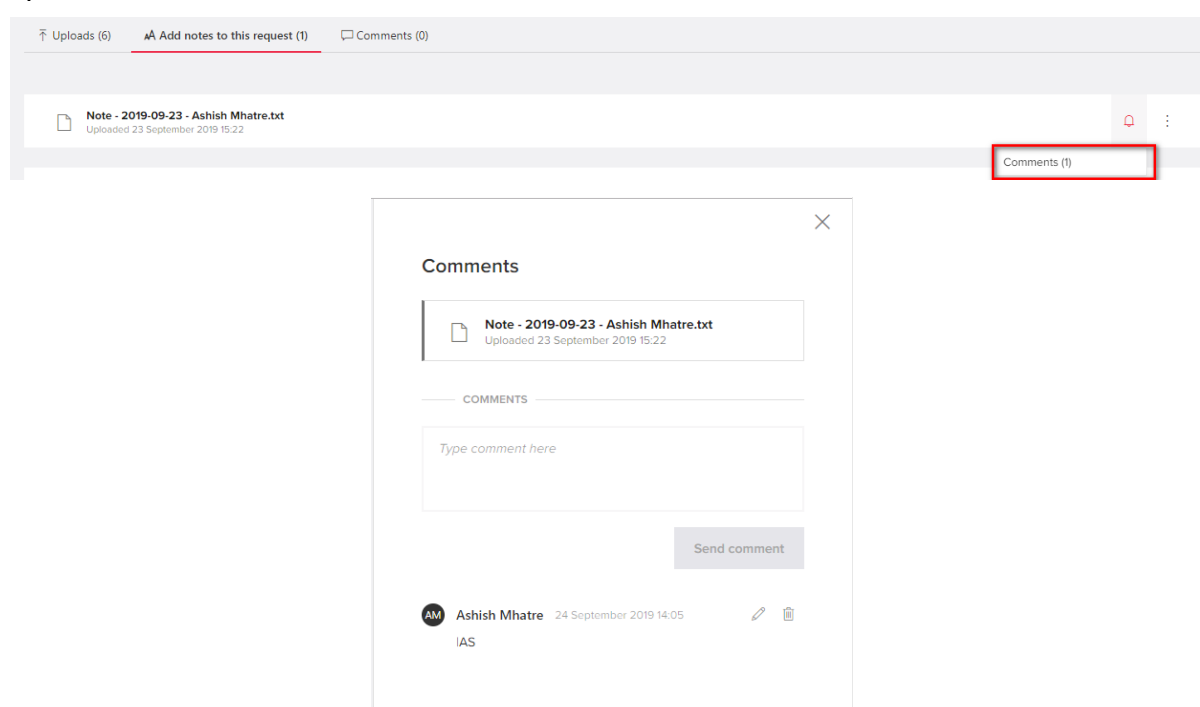
Comment can be edited again by clicking on pencil icon and save

13. ADDING COMMENTS TO A REQUEST

A comment can be added to a request item. It is intended that this functionality can be used by the client as a way of satisfying a request where there are no documents required. To add a comment, click on the Comments tab.   A space will then show to add comments. To save the comment, press 'Send Comments'
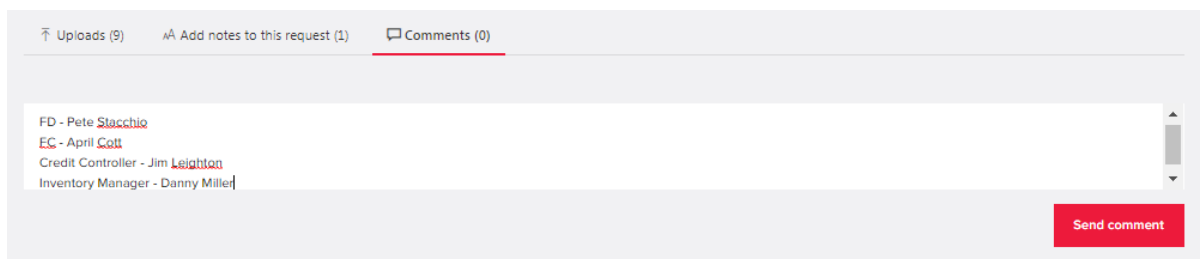
Where comments have been added to the request, the number of comments show in brackets to the right of the Comments label . The comment will also be displayed in the request item.

Comment can be again edited by clicking on pencil icon and save.

14. ADDING COMMENTS TO A DOCUMENT

As well as adding notes or comments to a request, users can also add comments to the documents uploaded against a request.

To add a new comment, click on the ⋮ menu to the right of the document name, select comment.
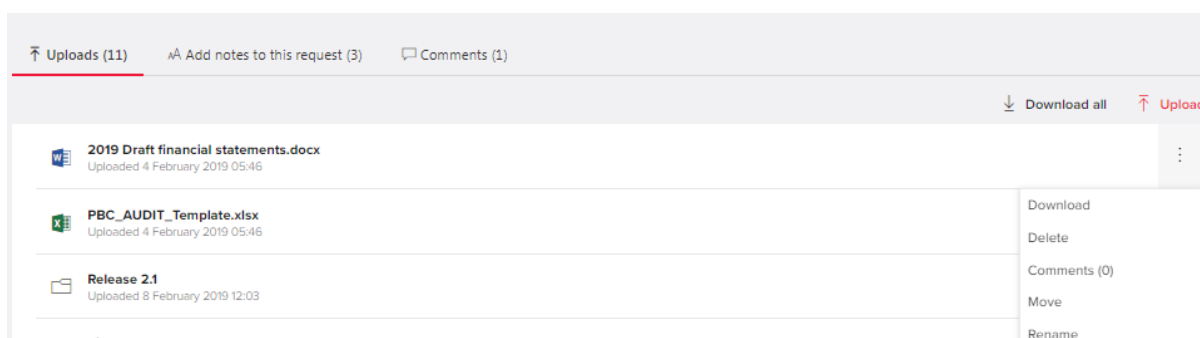
A comment panel will be opened and there you can enter the text in the text area and select 'Send comment' to save the comment.
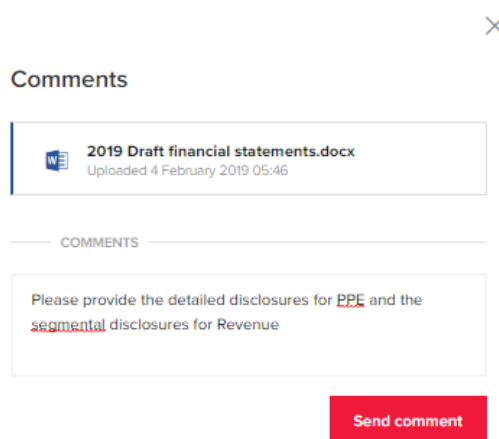
A loading indicator will show until the comment is saved.   A comment can be up to 1000 characters long.

If there is a comment against one or more documents in a request, an icon will show. Clicking that will show the number of comments against the document.

The comments can be displayed by clicking on the three dots button on the document row and selecting 'Comments'. The comments can also be opened by clicking on the indicator itself. A side panel will then open, showing the comments.

A comment can be edited or deleted by clicking either the edit or delete button right of the person's name

15. PROVIDING COMMENTS ON AN UPLOADED FOLDER

A Exchange user can provide a comment on an uploaded folder. Choose comments(0) from the menu.
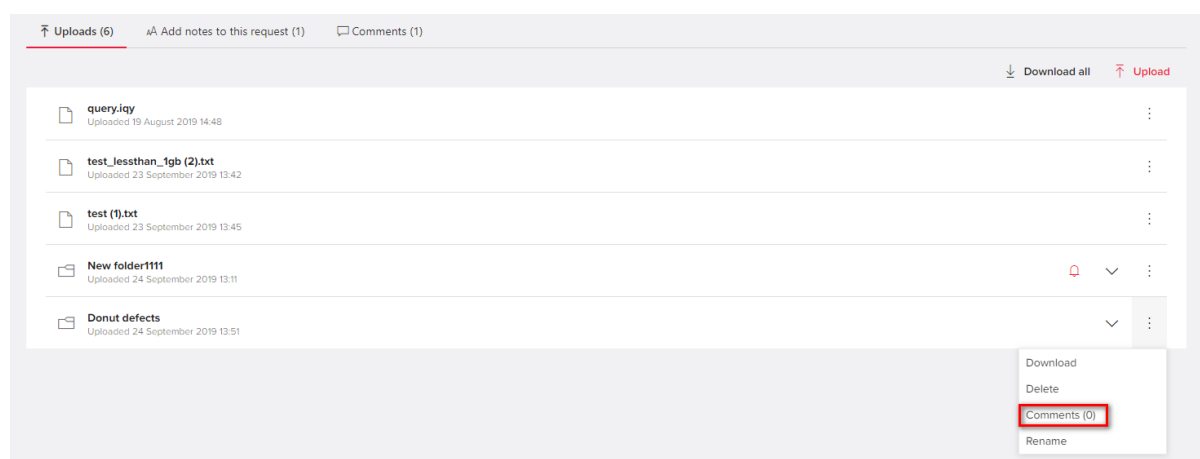
This will open a panel in which comments can be provided. To save the comment, click 'Send comment'. The text should then display with the user name and time/date of the comment.
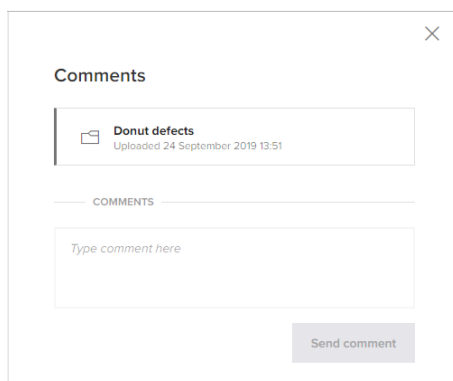
A comment can be edited at any time by clicking on the ✏ icon against the comment to be edited. Press the 🖫 icon to save the comment.
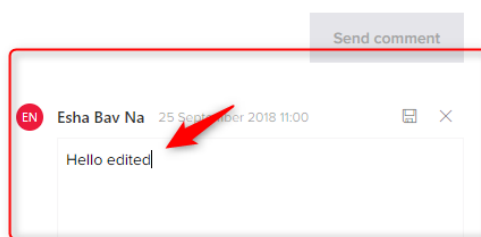
A comment can also be deleted by clicking on the 🗑 icon against the comment to be deleted

16. DOCUMENT SIGNING

A request can be included in the Exchange, the satisfaction of which is the signing of a document by one or more Client team members. Once the last person has signed the document, the status of the Exchange request item will need to be manually changed to Delivered.

A BDO user will upload a document to sign, following the usual Exchange document upload functionality. After the upload, it is mandatory to select document Due date and Assignees.

- After saving the request item, the document appears in the list of Documents for Sign.
- The restricted pencil icon means this task is not assigned to a user and so cannot be signed by that user.
- The highlighted pencil icon means the task means tasks is assigned to you and waiting for your approval.

To sign the document, a BDO user or the assigned client user clicks on Signing icon, which will then take the user from Exchange to DocuSign where the document will be signed.

Click on Adopt and Sign to submit a signature

Click on Finish

The user will then be taken back to Exchange. Icons change accordingly depending on whether signing was successful or not.

17. DELIVER A REQUEST

Click on a request list item from the request overview or on the request list on the left hand side in order to set the status to Delivered.

The deliver request button is disabled until the client uploads a document or add notes to request. The status before delivering or after BDO has returned a request is open.
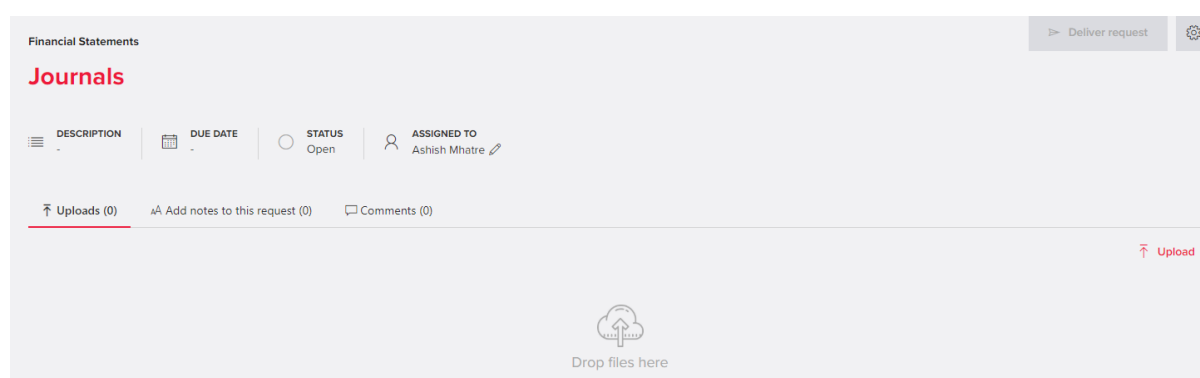
Once a document or documents has/have been added against a request, the deliver request button is enabled to allow the request to be set to delivered.   A comment can be added either to provide further information on the document(s) added to the request or on its own, which also will allow the request to be set to delivered.

The new 'Delivered' status will show on both the detailed view of the request and on the request list
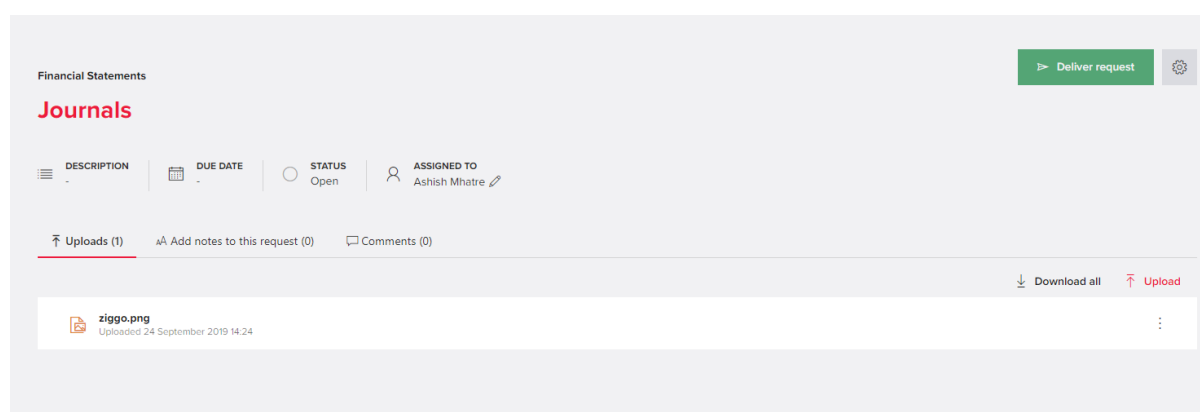
As well as setting individual items to 'Delivered', the client can also 'deliver' more than request at a time to BDO.

From the multiple request icon, select Deliver multiple requests
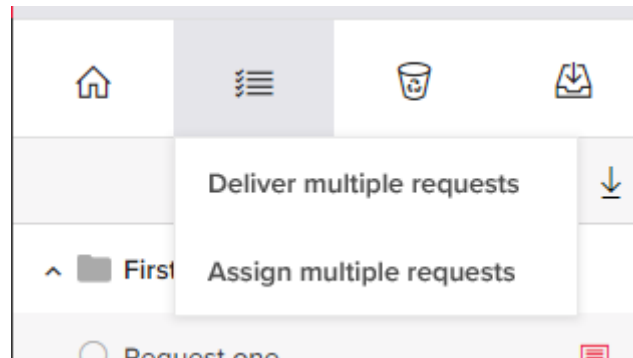
and then in the request item list, tick the items that need to be set to Delivered and then click 'Deliver Requests'
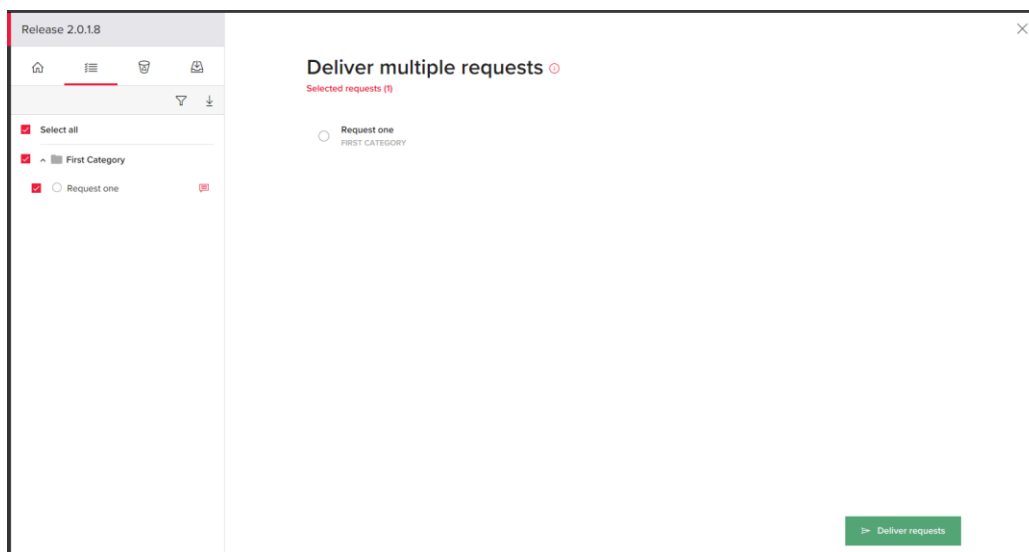
18.   ACCEPTED STATUS

If BDO is satisfied with the request item, they will accept the item and client will see the updated status as accepted

19.   RETURNED STATUS

If BDO are not satisfied with the response to a request, they can return that item along with a note detailing the reason why. This request then becomes Open again and ready for the client to respond.

The client will upload documents and/or comments as if answering the request for the first time and then re-set the status to Delivered.

20.   DOWNLOAD ALL FILES

Download all files gives multiple options wherein either all files can be downloaded or just select the check box with what needs to be downloaded
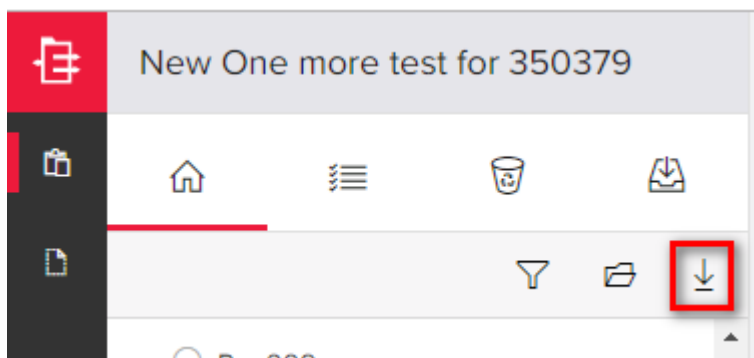
Below is the option popup
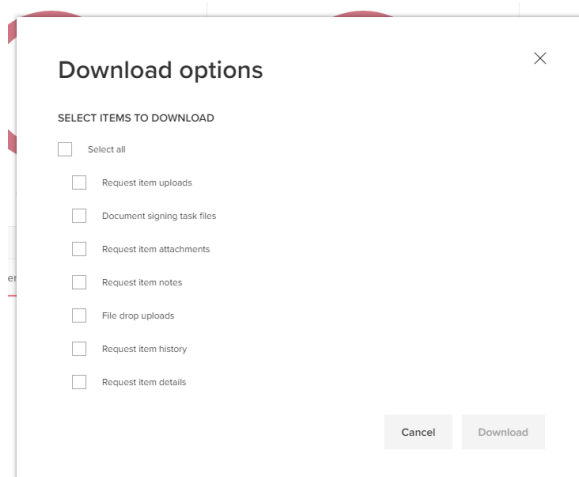
If select all is selected all the documents in a zip file will be donloaded.

Request item uploads: Zip file with all items uploaded in a request will be downloaded

Document signing task files: Zip file containing all signing documents in the request items will be downloaded

Request item attachments: Zip file with all items attached to a request will be downloaded

Request item notes: Zip file with all notes to all request items will be downloaded

File drop uploads: Zip file with all items in file drop will be downloaded

Request item history: Zip file with a document containing history of the Exchange project will be downloaded (History is nothing but all the events like upload, delete, add etc. that happened in Exchange project).

Request item details: This is nothing but an excel file having below details

Category

Request Name

Description

Status

Status date

Due Date

Assigned to

Category	Request name	Description	Status	Status date	Due date	Assigned to
CaT001	Req001	Des001	Accepted	23-08-2019	21-08-2019	deepthi chandrashekar
CaT002	Req002	Des002	Accepted	22-08-2019	21-08-2019	Dan manny
CaT003	Req003	Des003	Accepted	20-09-2019	21-08-2019	Pablo Esquerdo
CaT004	Req004	Des004	Open	23-08-2019	27-08-2019	Rui Wang
CaT005	Req005	Des005	Open	03-09-2019	27-08-2019	
CaT006	Req006	Des006	Accepted	06-09-2019	26-08-2019	rob nova
CaT007	Req007	Des007	Open	20-08-2019	26-08-2019	deepthi chandrashekar
CaT008	Req008	Des008	Open	20-08-2019		Dan manny
CaT009	Req009	Des009	Delivered	26-08-2019	21-08-2019	deepthi chandrashekar
CaT010	Req010	Des010	Open	26-08-2019	21-08-2019	john verm
CaT011	Req011	Des011	Open	20-08-2019	21-08-2019	deepthi chandrashekar
CaT012	Req012	Des012	Open	21-08-2019	21-08-2019	Dan manny
CaT013	Req013	Des013	Open	20-08-2019	02-09-2019	Pablo Esquerdo
CaT014	Req014	Des014	Open	20-08-2019	02-09-2019	Rui Wang
CaT015	Req015	Des015	Open	20-08-2019	21-08-2019	john verm
CaT016	Req016	Des016	Accepted	26-08-2019	30-08-2019	van dam
CaT017	Req017	Des017	Open	10-09-2019	21-08-2019	Silky Nanda
CaT018	Req018	Des018	Open	20-08-2019	30-08-2019	Pablo Esquerdo
CaT019	Req019	Des019	Open	20-08-2019	21-08-2019	
CaT020	Req020	Des020	Open	20-08-2019	02-09-2019	Pablo Esquerdo
CaT021	Req021	Des021	Accepted	21-08-2019	21-08-2019	rob nova
CaT022	Req022	Des022	Accepted	21-08-2019	30-08-2019	Rui Wang
CaT023	Req023	Des023	Accepted	21-08-2019	30-08-2019	Silky Nanda

21. VISUALIZATION OF WORKFLOW AND STATUS (DASHBOARDS)

On the home screen, users will be able to see a visualization of the current status of the Exchange requests. The dashboards can be accessed from the Home icon.
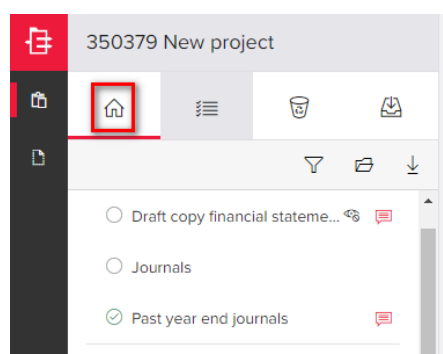
Dashboard have three doughnut STATUS, DUE DATE and PER PERSON.
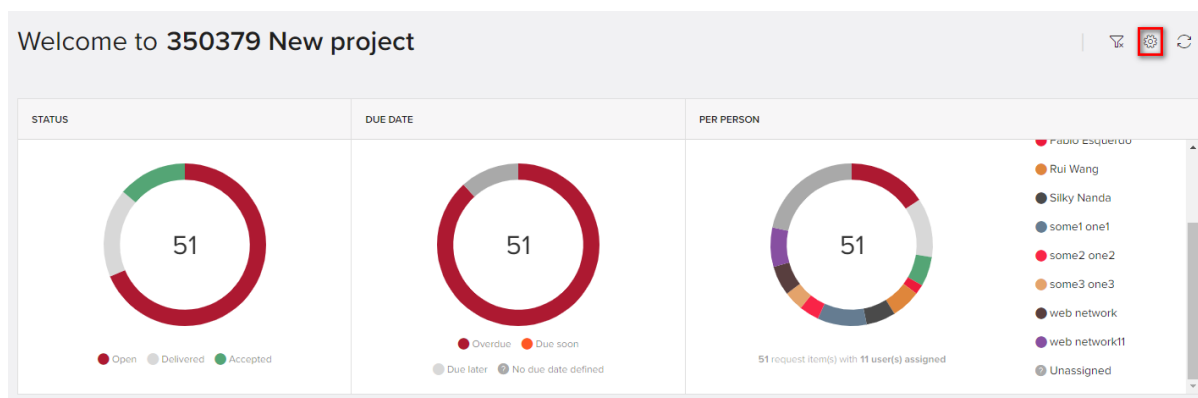
Settings on RHS has 2 views "Show number of items " and show Oercentages of items , by default selected is "Show number of items ".
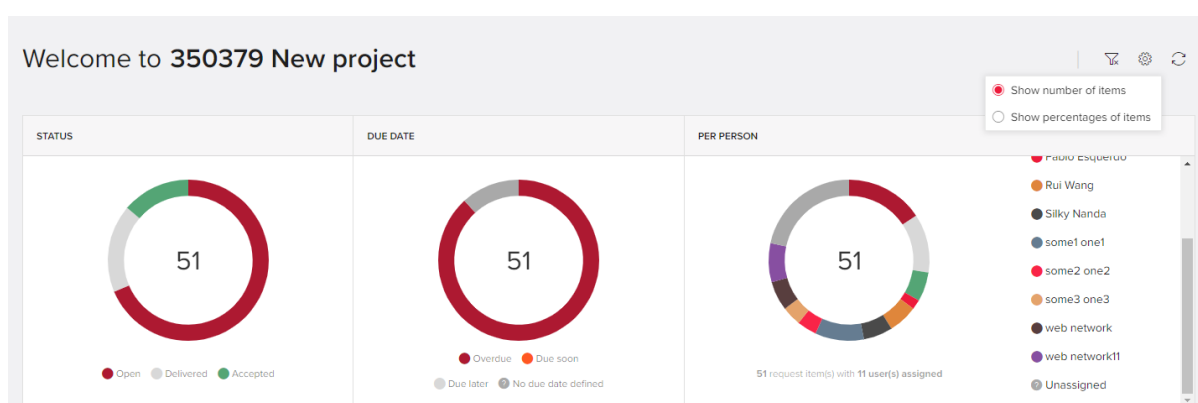
Show number of items

Initailly doughnuts will by default show total number of Request items in that Exchange project.

By clicking/hovering on an section on the chart, the selected item on the legend is highlighted and qualified request items out of total request items is shown in doughnut.

The dashboards available will show:

1) Hovering:

STATUS Doughnut:

The count of qualified request items out of total request items are shown, below example Accepted is hovered, similarly it works for other sections. In this case 7 are overdue out of 51
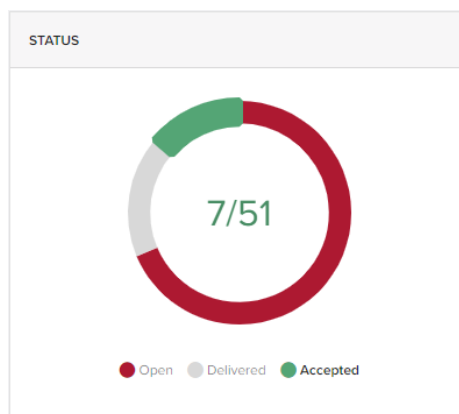
DUE DATE Doughnut:

The count of qualified request items out of total request items is shown in doughnut, below example Overdue is hovered similarly it works for other sections hovered. In this case 45 are overdue out of 51
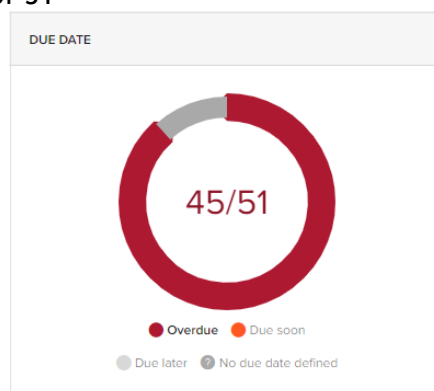
PER PERSON Doughnut:

The count of qualified request items out of total request items is shown in the doughnut, here Ashish is hovered. In this case 8 are overdue out of 51
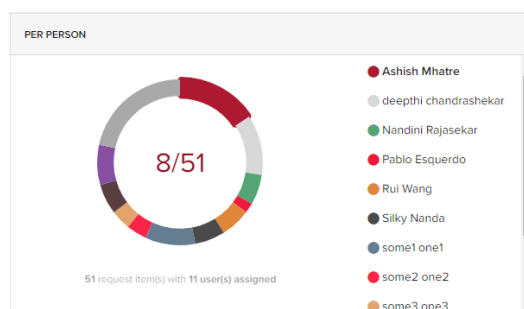
2) Selection can be done either by selecting a doughnut or selecting legend below the doughnut , the section in the doughnut gets highlighted showing count of qualified Request items out of total Request items and the table below the dashboard the "Selected" tab will have the qualified rows.
Also "Selected" tab has following columns Category, Request name, Description, Status, Status date, Due date and assigned to

STATUS Doughnut:
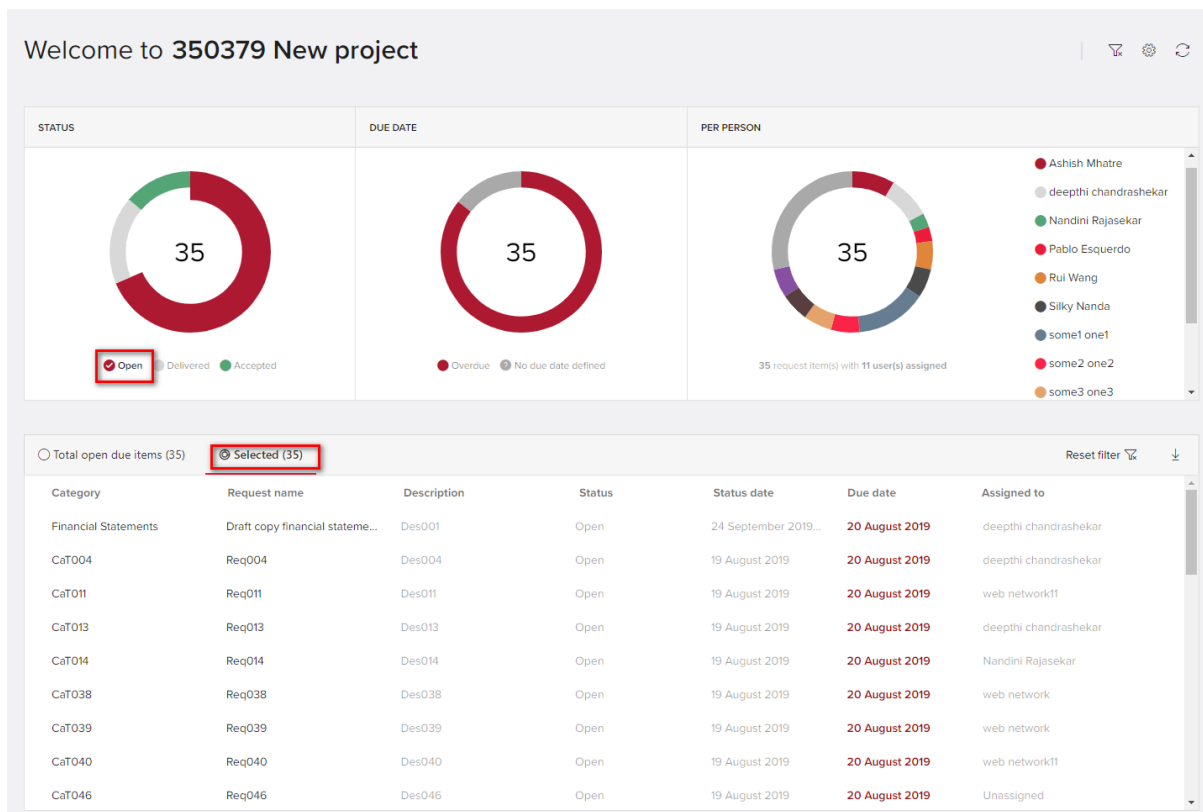
Open selected

DUE DATE Doughnut:

Overdue selected
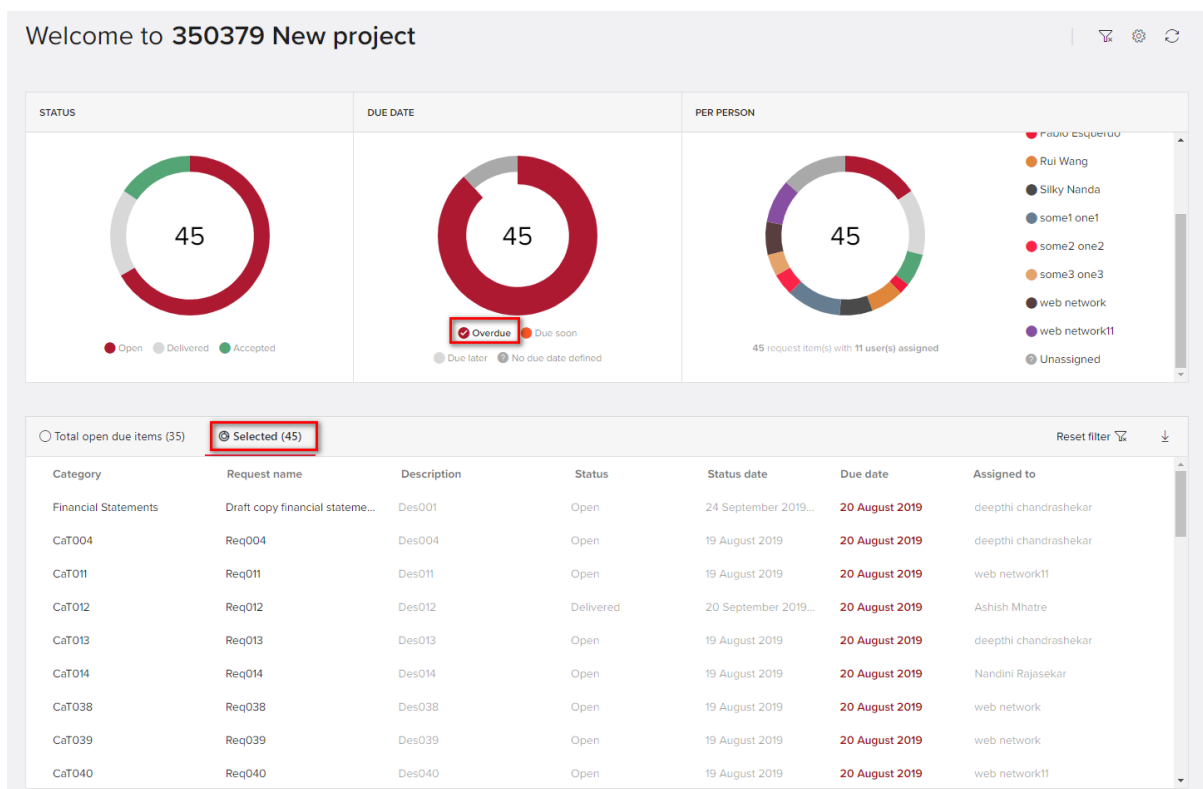
PER PERSON Doughnut:
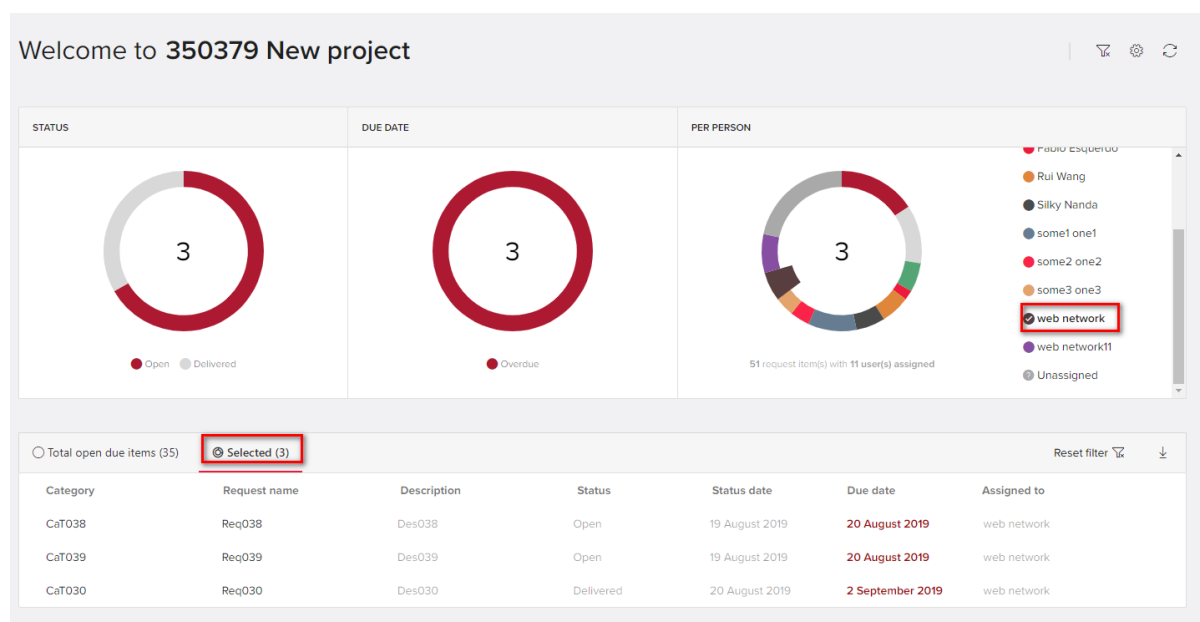
3) Drilldown for more refined result:
Furthermore, combination selection can be done in doughnuts to have more refined results
For example:
Select Open from status doughnut, Overdue from DUE DATE doughnut and Pablo form PER PERSON doughnut.

Screen shot will show qualified result, there are 4 request assigned to Pablo which are overdue and open , Selected shows the same
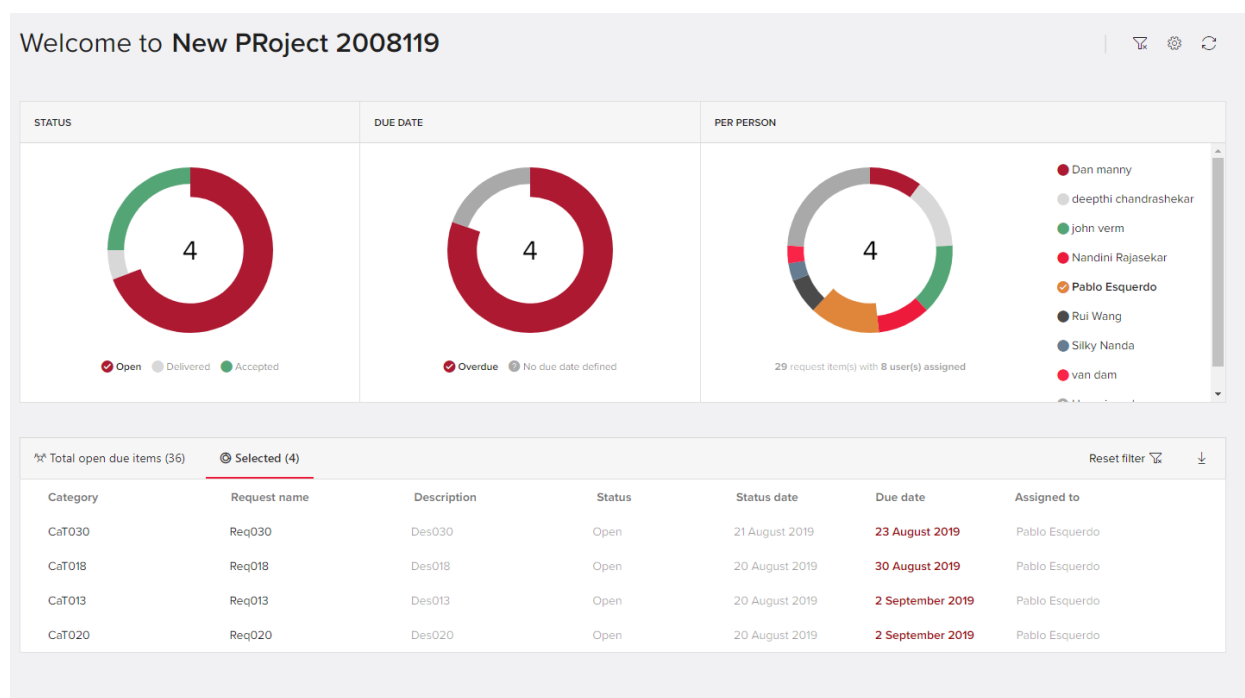
Furthermore, we can add more selection criteria, for above example I can add Nandini in the selection criteria.
So in this case there are total 7 rows qualified 4 for Pablo and 3 for Nandini which are overdue and open
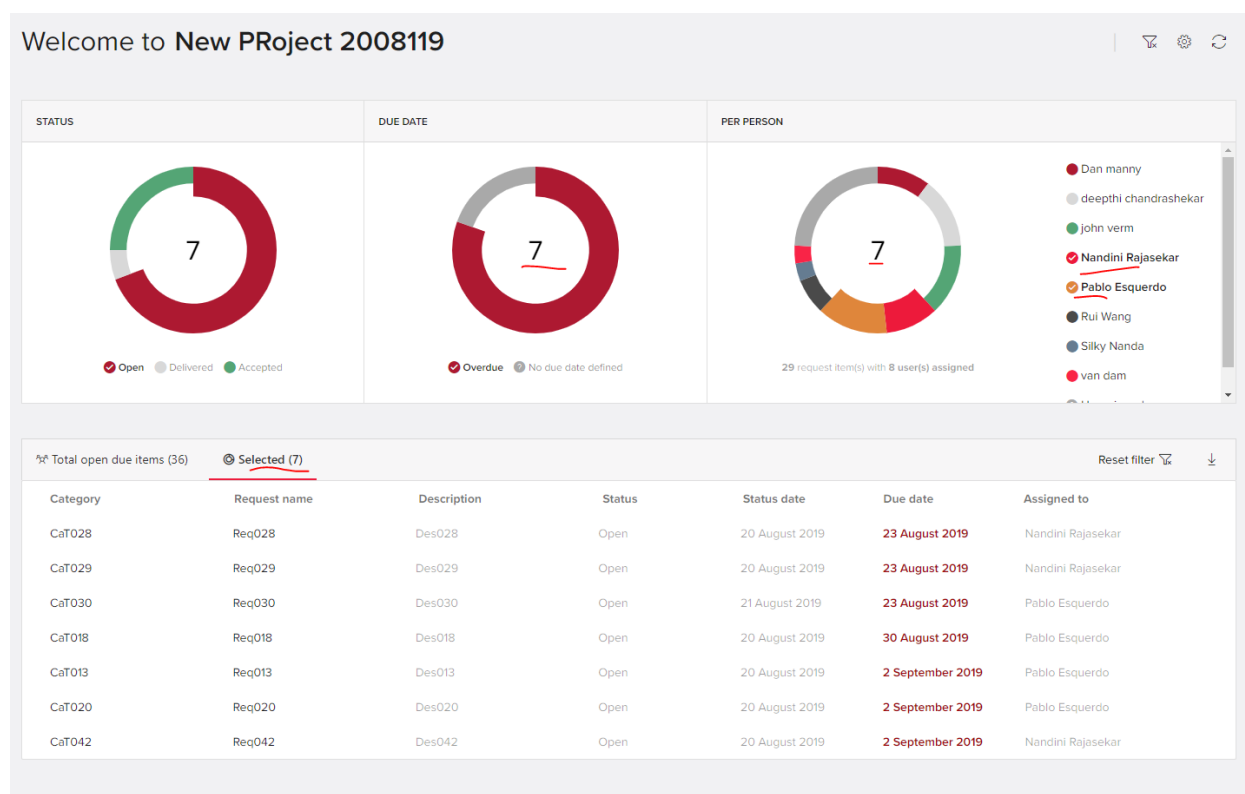
This can go on furthermore on with selection from any doughnut.

4) Selection can be reset by using rest filter button at top and bottom
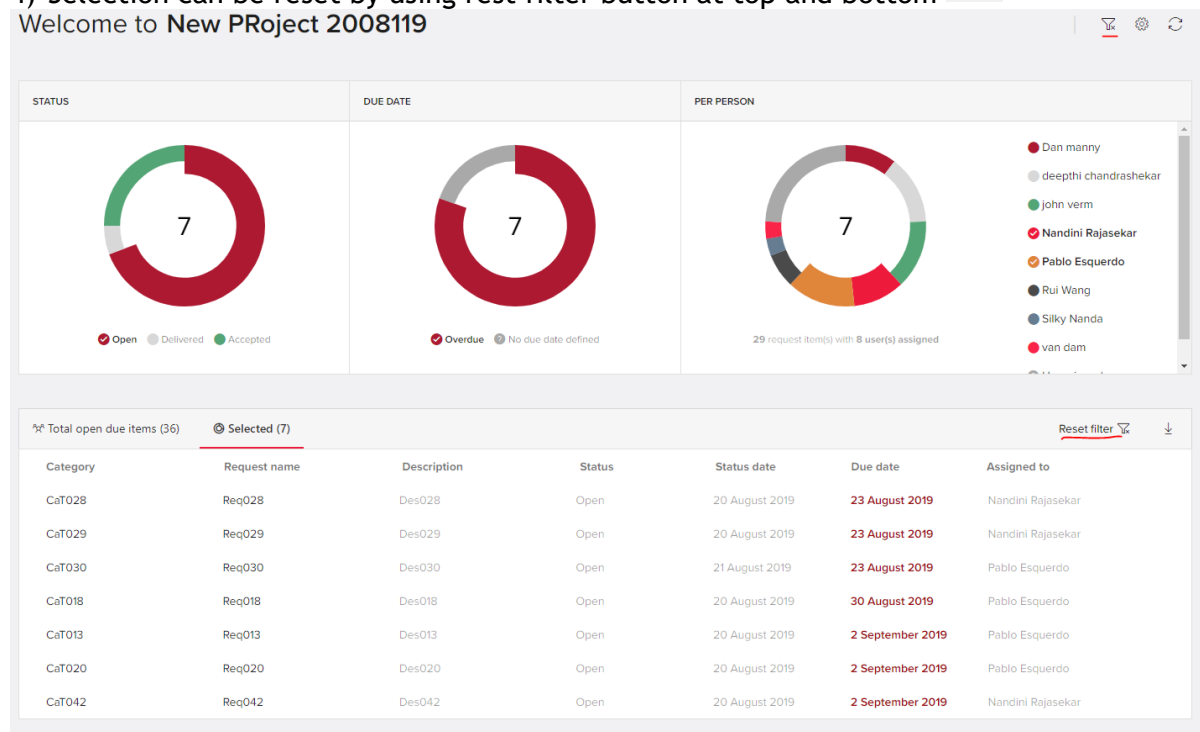
5) To see the most up to date information, press the refresh button .
Download Icon will download the data in excel the data can either be of "Total open due items" or selected and it will have all rows qualified with following columns Category , Request name, Description, Status, Status date, Due date and assigned to
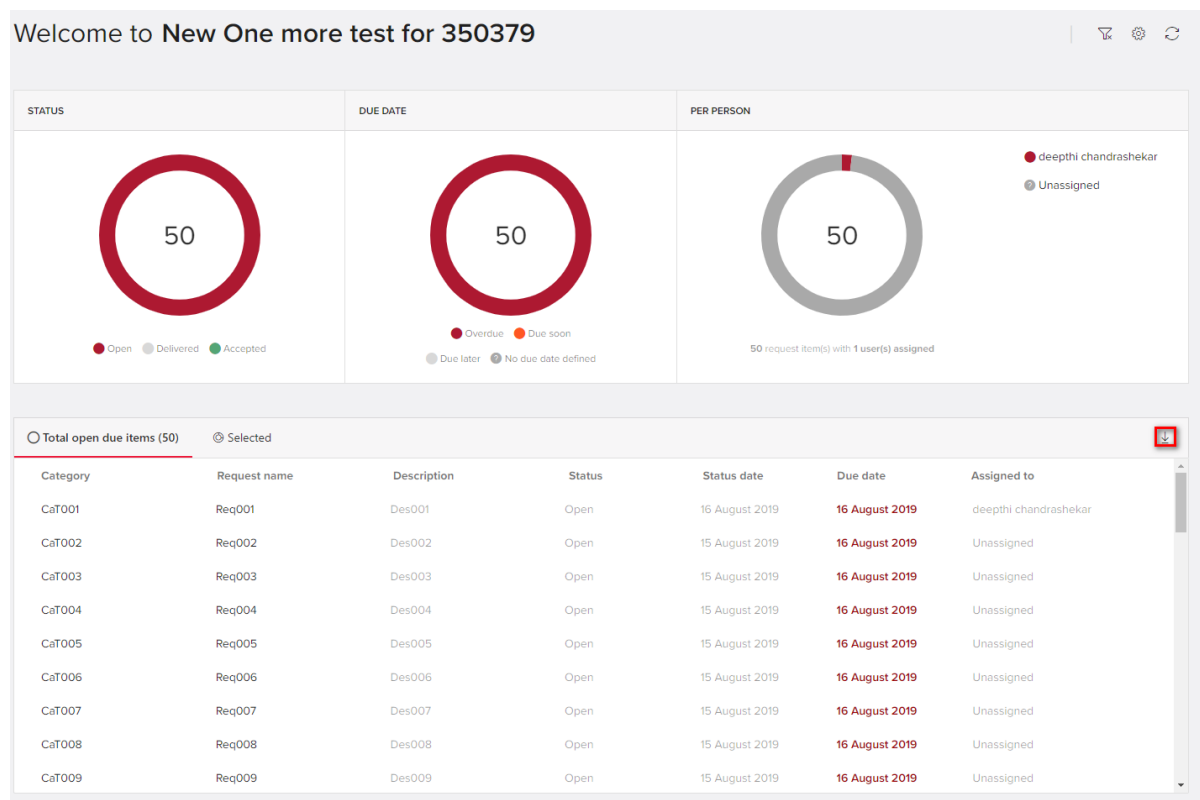
Show Percentages of items

Initailly doughnuts will by default show 100%.

By clicking/hovering on a section on the chart, the selected item on the legend is highlighted and doughnut will display percentage value of qualified request items out of total request items is shown in doughnut.

Rest all behavior is same as of "Show number of items" only difference is the values are in percentage.

For example: below we have selected open in doughnut STATUS, so the qualified rows are 7 and doughnut shows 13.7% which is nothing but 7/51. 51 are total request item count.

22. HISTORY OF EXCHANGE PROJECT REQUEST ITEMS

The history of a request item is now available to view by clicking the ⚙ icon in the top right corner of the request item and selecting View history.
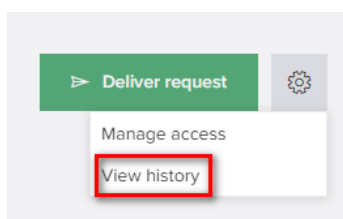
All 'actions' for the request item will be shown, with the date, the user who performed the action, the details of the action and type of item on which the action is performed (folder, document, Note etc.). The most recent actions are shown first.

The following actions will be shown in the history:

Request Item

- Edit assignee, manage access
- Status change (request delivered) (show as the request status is changed to open)
- remove restriction of access.

Uploads (documents, folders)

- Add
- Delete
- Move
- Restore
- Rename

DocuSign

- DocuSign document

Comments

- Add, edit, delete comment

Notes

- Add, delete and Rename (Note will have its item type as Note for any actions taken)

History ⓘ
req001

Date	Change
26 SEPTEMBER 2019	Ashish Mhatre deleted the note "**Note - 2019-09-26 - Ashish Mhatre1.txt**" from the request
	Ashish Mhatre removed the document "**CSharp paths.txt**" from the uploads
	Ashish Mhatre deleted the folder "**Donut defects**" from the uploads
	Ashish Mhatre added the comment "**3**" on the note "**Note - 2019-09-26 - Ashish Mhatre1.txt**"
	Ashish Mhatre changed the name "" to "**Note - 2019-09-26 - Ashish Mhatre1.txt**" in the notes
	Ashish Mhatre added a note "**Note - 2019-09-26 - Ashish Mhatre.txt**" to the request
	Ashish Mhatre added the comment "**2**" on the folder "**Donut defects**" in the uploads
	Ashish Mhatre added the comment "**1**" on the document "**CSharp paths.txt**"
	Ashish Mhatre added the document "**Nothing selected.PNG**" to the uploads
	Ashish Mhatre added the document "**CSharp paths.txt**" to the uploads
	Ashish Mhatre added the folder "**Donut defects**" to the uploads
	Ashish Mhatre added the document "**CSharp paths.txt**" to the uploads
	Ashish Mhatre created the request "**req001**" with the category "**cat001**", due date "**-**", assigned to "**-**" and description "**desc001**"

Download history in Excel

To download the history of all items in a project – click on the Download all files
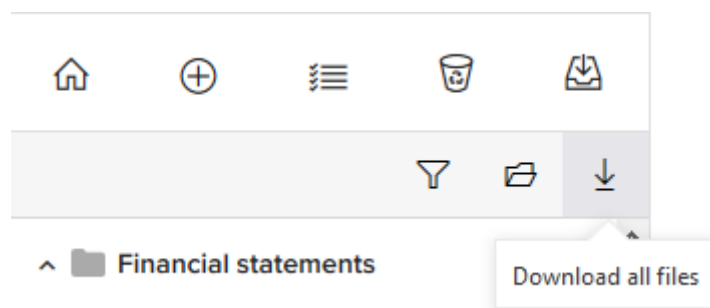
In the download options, Select Request item history and then Download.
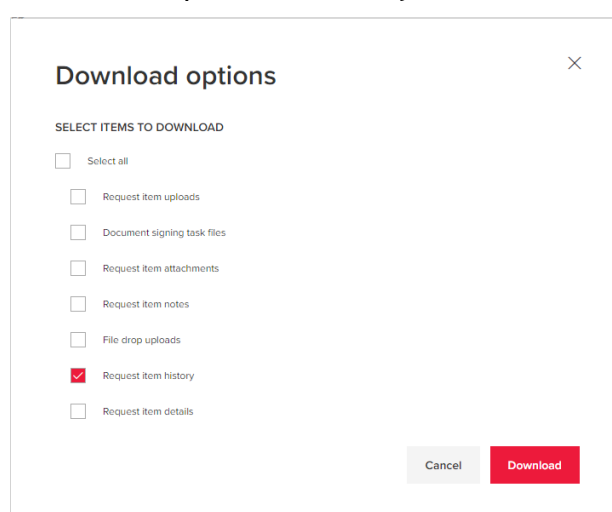
An Excel file will be generated similar to the below. The first column will be the Category, the second one the RequestItemName, the third the date and the fourth history, the action that the user has made.

RequestItemName	Category	Date	History
Testing	Financial statements	18-3-2019 12:19	Milton Wright - PBC DEV Added the comment "testint" on the request
Testing	Financial statements	18-3-2019 12:19	Milton Wright - PBC DEV added the document "text.txt" to the uploads
Testing	Financial statements	18-3-2019 12:18	Milton Wright - PBC DEV created the request "Testing" with the category "Financial statements", due date "14 March 2019", assigned to "-" and description "-"

23. EXCHANGE EMAIL NOTIFICATION

Exchange sends the Email to the assigned client (request item assigned) when either of below conditions:

1. Request Assigned

When a Client user is assigned an Exchange request Item by an BDO user, client receive an email. This email has the links for BDO portal and Project for which the request is assigned.

The mail received is:

Dear van dam,

Following changes have been made in the Exchange application of Client Portal.
Please find the details below.

Action: Request assigned to you
Client Portal: New Client portal Mauri 230819
Project: New Project Mauri 230819
Category: CaT009
Request: Req009
Assigned to: van dam

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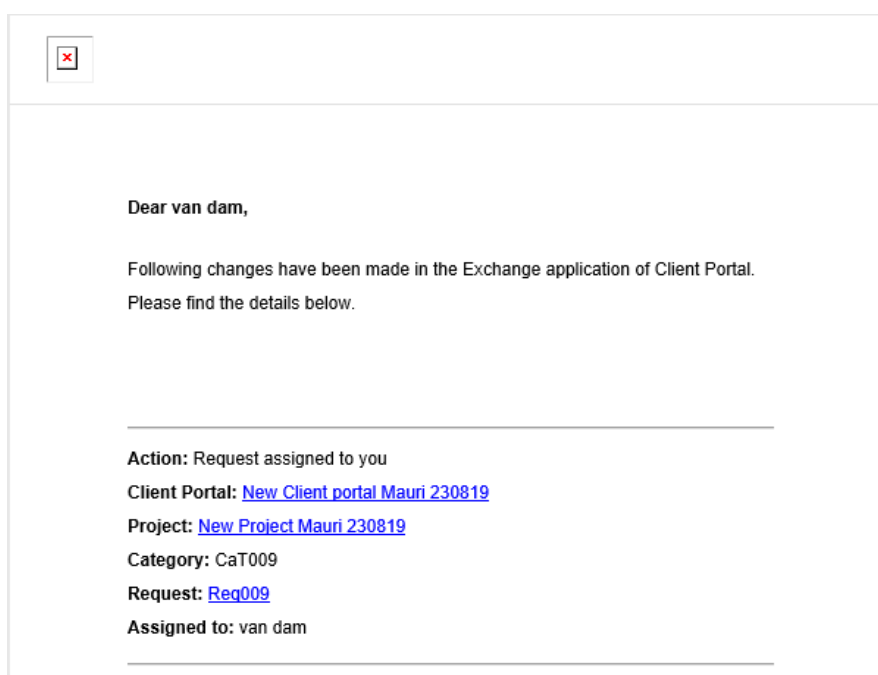
2. Request unassigned

When a Client user is unassigned from an Exchange request Item by an BDO user, client receive an email. This email has the links for BDO portal and Project for which the request is unassigned.

The mail received is:

3. Request Returned

When Exchange request item is returned by BDO user, Client user is informed by email. This email has the links for BDO portal and Project for which the request is returned.

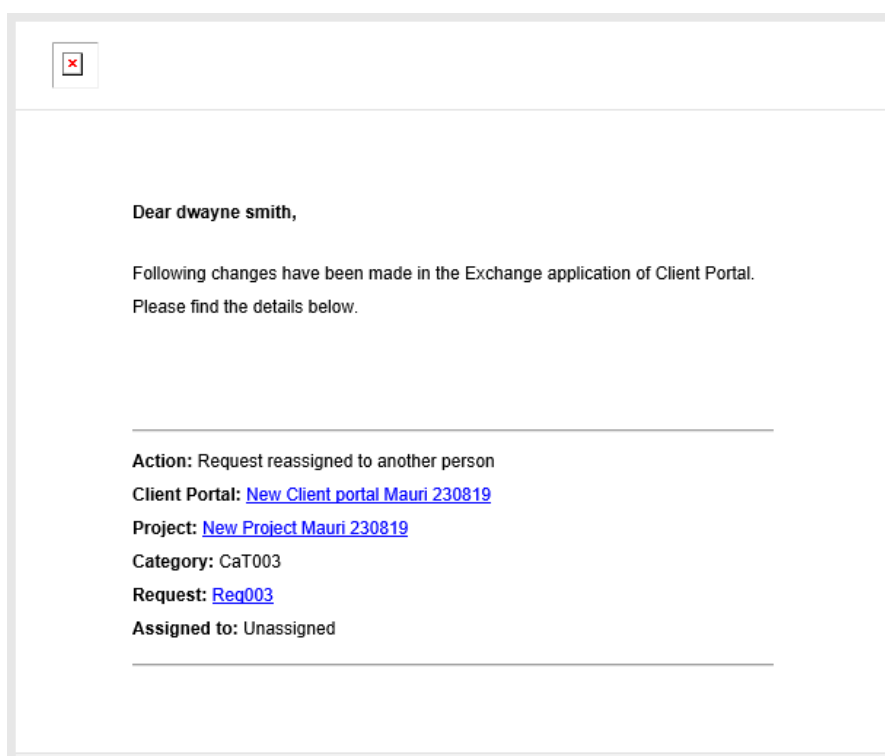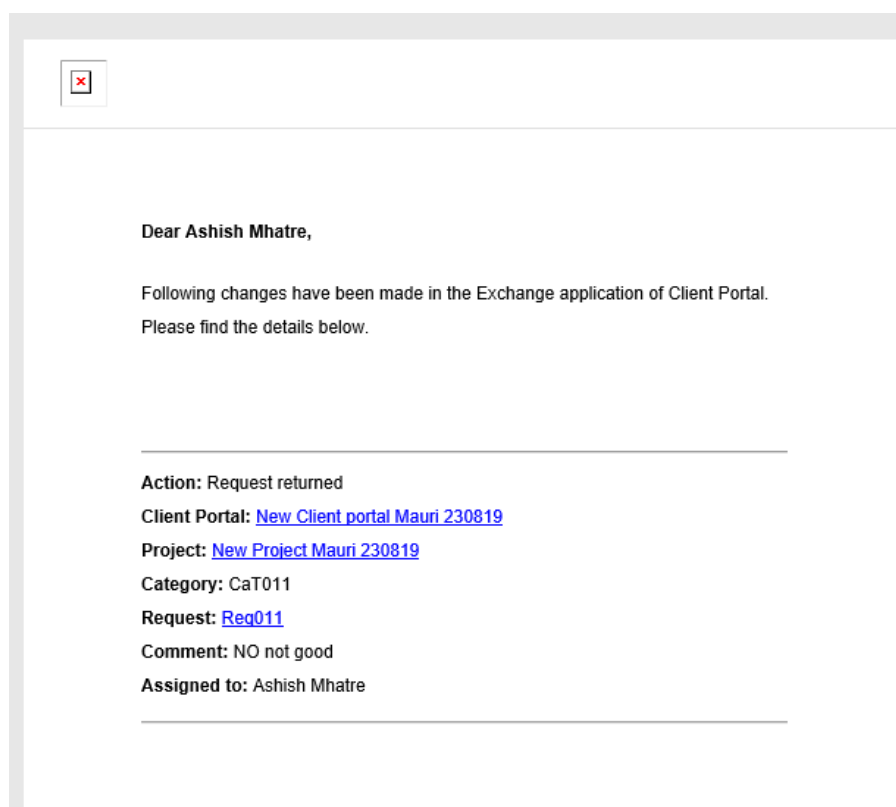The mail received is:

4. Request status changes

Client user I informed by email when there is status change for request item he is assigned, status change can be Accepted, Delivered.

The mail received is:

Dear john verm,

Following changes have been made in the Exchange application of Client Portal.
Please find the details below.

Action: Request with changed status
Client Portal: New Client portal Mauri 230819
Project: New Project Mauri 230819
Category: CaT004
Request: Req004
New status: Accepted
Assigned to: john verm

Dear dwayne smith,

Following changes have been made in the Exchange application of Client Portal.
Please find the details below.

Action: Request with changed status
Client Portal: New Client portal Mauri 230819
Project: New Project Mauri 230819
Category: CaT001
Request: Req001
New status: Delivered
Assigned to: dwayne smith

24. SETTINGS IN EXCHANGE

On bottom left hand of Exchange there is, it has below options:

- Go to BDO Portal: Below Admin settings, this allows user to go to BDO portal home page in new tab.
- BDO portal name: just above Login username, this is the BDO portal user is currently logged in clicking on the same new tab is triggered which take user to BDO portal on which he is currently logged in.
- Username of login client.