

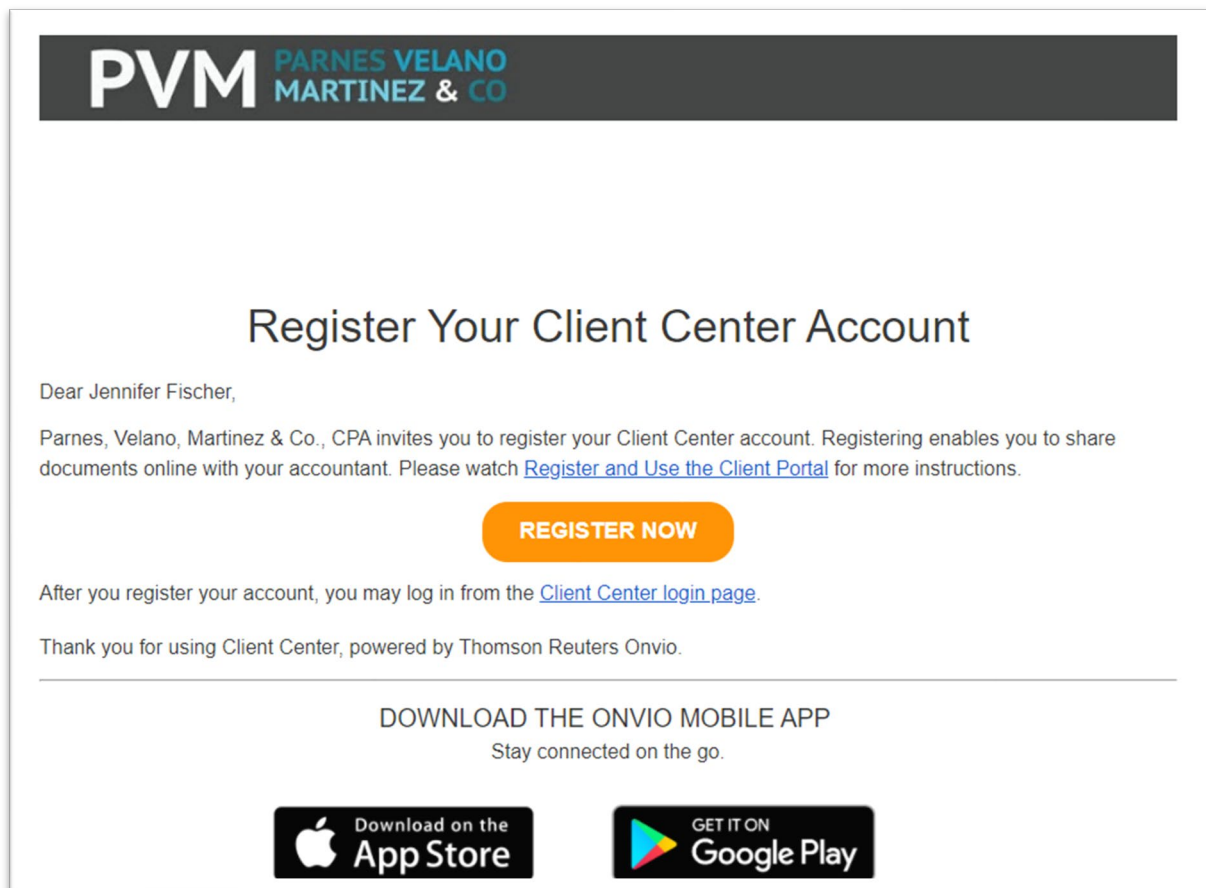
# Onvio Client Center quick start guide

Within this guide, you'll learn how to set up and use Onvio Client Center.

## Set up your Onvio portal

You'll get an email similar to the following.

1. Select Register Now



If you have any questions or need help, call and ask for our portal administrator or e-mail us at

2. Make sure your account information is correct, and then create a password for your account

## Register Your Account

Account Information

First Name \*  Last Name \*

Email (Thomson Reuters ID)

Create Password

New Password \*  [Show typing](#)

✓ Password is acceptable.

Confirm Password \*

✓ Password is confirmed.

\* Required Field

Password Requirements

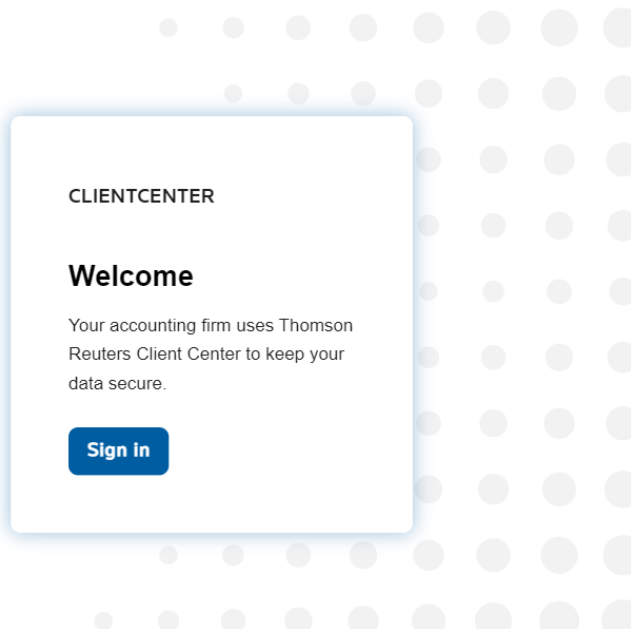
Your password **must** have at least 8 characters and 4 of the following:

- At least 1 number (0-9)
- At least 1 lowercase letter (a-z)
- At least 1 uppercase letter (A-Z)
- At least 1 special character (punctuation): ` ~ ! @ # \$ % ^ & \* ( ) \_ - + = { } [ ] \ | ; : " ' , . ? /

Your password should **not** use:

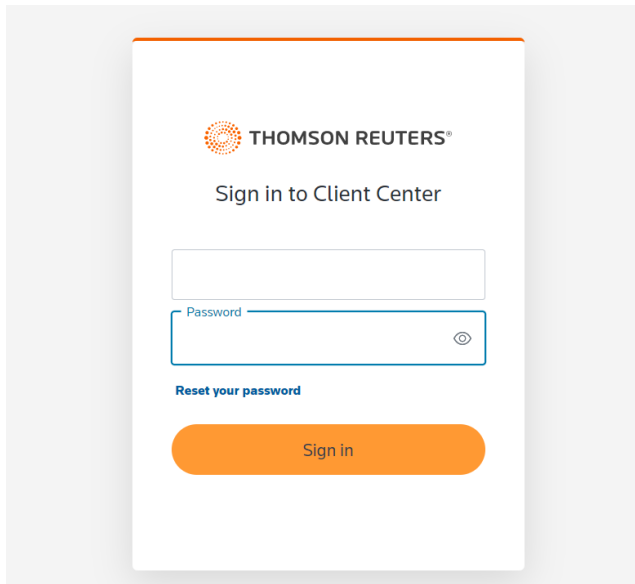
- words from the dictionary
- your user ID
- sequential letters or numbers such as "abc" or "123"

3. Select **Register Me**, and then **Sign in**.

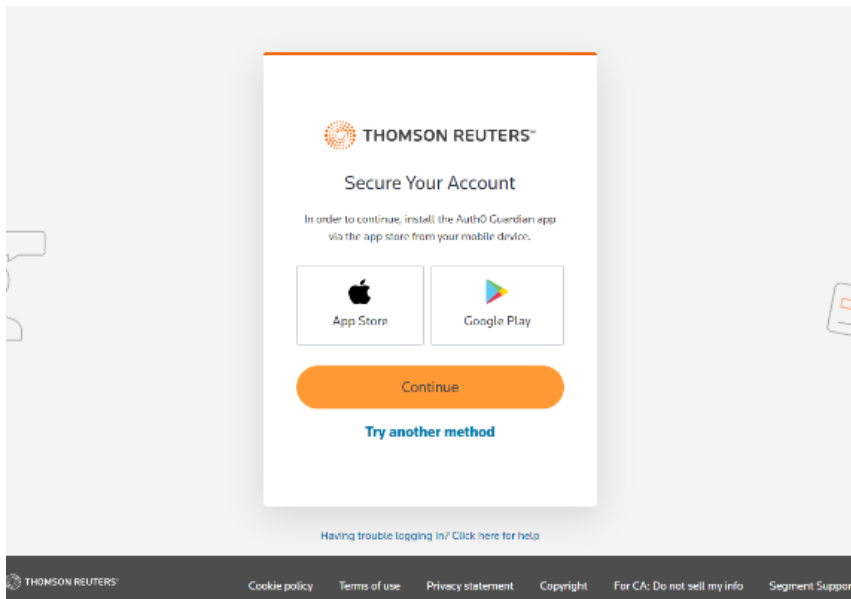


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4. Enter the email you used to register with and the password you chose.



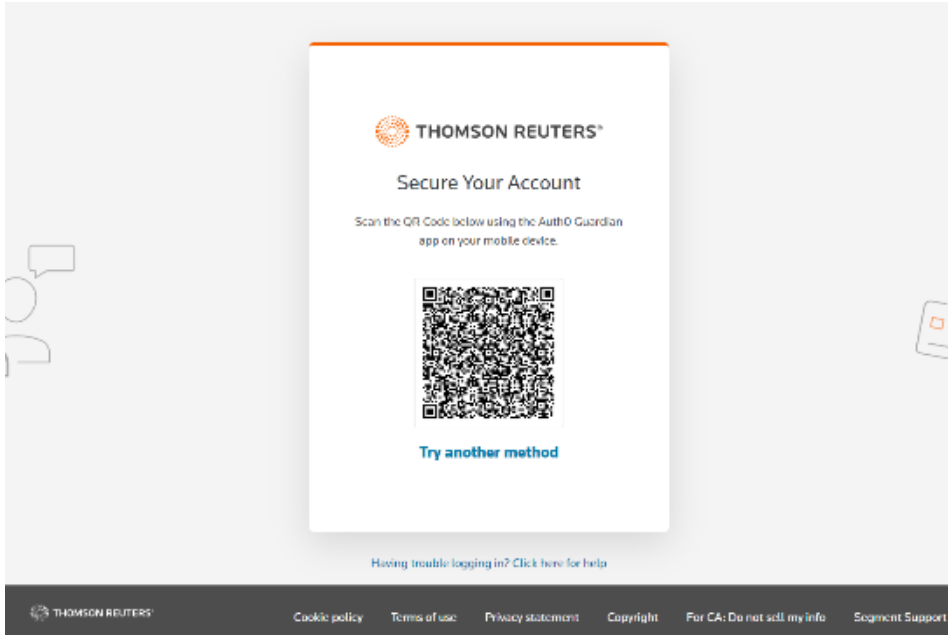
5. You're required to set up 2SV to use your Client Center portal. First, install the Auth0 Guardian app from the App Store (iOS devices) or Google Play Store (Android devices).



If you already have an authenticator app and would rather use that, select **Try Another Method**, choose a supported option, and continue the setup. The steps in this guide are for the Auth0 Guardian app method.

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6. Scan the QR code displayed in your computer screen to pair your new Client Center account with the Auth0 guardian app on your mobile device.



7. Accept the Terms and Conditions for using Client Center.

Terms and Conditions

**Cancellation Policy**

Fees and expenses paid under our agreement are nonrefundable and will not be prorated. You may cancel one of more of the Services at any time by submitting written notice to our firm.

**Confidentiality**

Like all providers of personal financial services, tax professionals are required by law to inform clients of their policies regarding the privacy of client information. Our firm adheres to professional standards of confidentiality that are even more stringent than those required by law. The only nonpublic personal information we collect is information that you provide to us or information that we obtained with your authorization.

We do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures might include providing information to our employees or, in limited situations, to unrelated third parties that need the information to assist us in serving you. In all situations, we stress the confidential nature of the information being shared.

**Limited Liability**

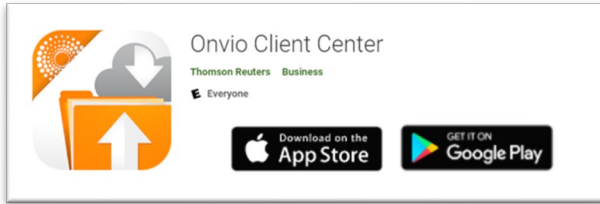
Our firm shall not in any event be liable for any incidental, indirect, special, punitive, or consequential damages (including lost profits) that you or others may experience as a result of or relating to this agreement or the use of this service, even if we advised you of the possibility of such damages.

By clicking "I Agree", you indicate that you agree to these Terms and Conditions.

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## Set up your mobile device

You can download the **Onvio Client Center app**, to use your portal on your mobile device instead of needing to sign in on a computer.

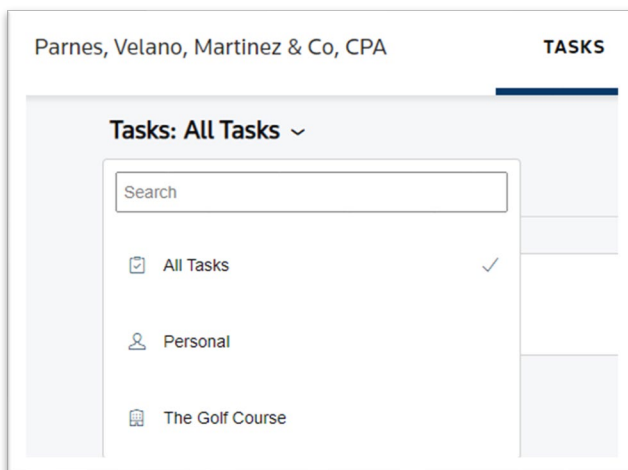


## How to use Onvio Client Center

### On a computer

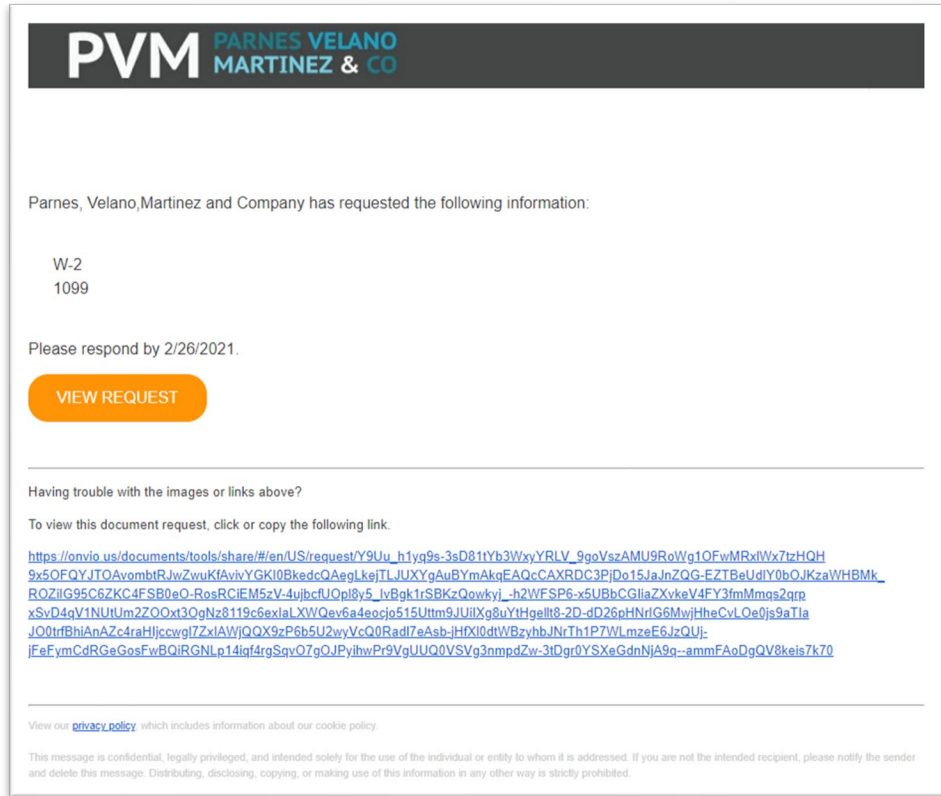
To access your portal, visit our firm's website \_\_\_\_\_ and select \_\_\_\_\_. Here you can upload documents to submit to us, or reply to our request for specific documents.

If you have multiple accounts, make sure to select the correct individual or company for the document you're uploading.

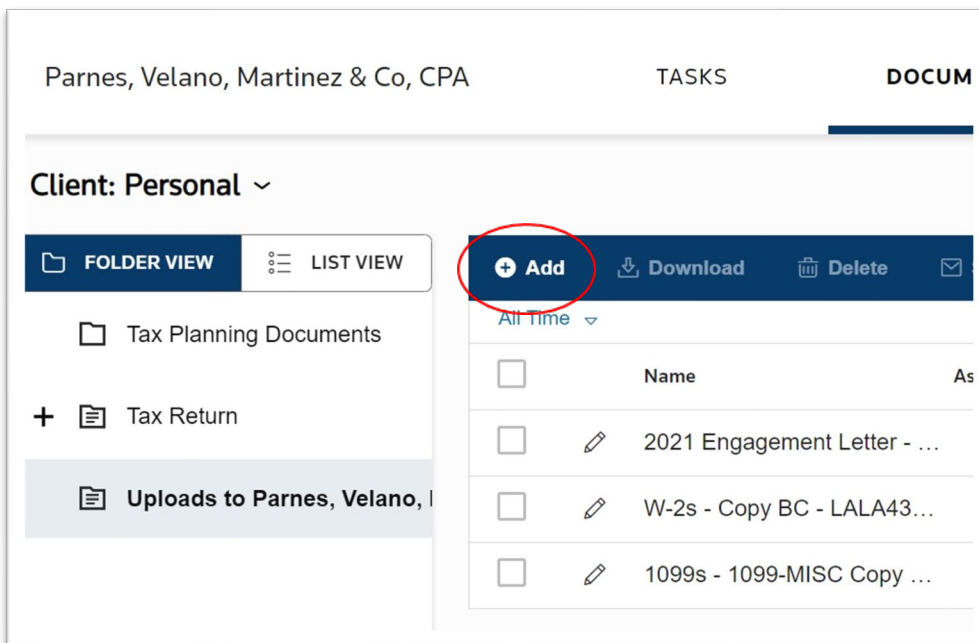


If you have any questions or need help, call and ask for our portal administrator or e-mail us at \_\_\_\_\_

If we requested a document from you, you'll get an email similar to this:



Select **View Request**, and then select **Add** in Onvio Client Center to upload your documents.



If you have any questions or need help, call and ask for our portal administrator or e-mail us at

You have the option of submitting saved documents via PDF or scanning from a device.




- Please note we need all documents in **PDF format only. NO JPEGS OR IMAGE FILES OF ANY TYPE**

Add Document - Fischer, Jennifer ✕

Drag a File Here or

**BROWSE FOR FILE** > or SCAN FROM DEVICE

- Or Add Files From -

 Google Drive  **Dropbox**  box

**UPLOAD** CANCEL

If you have any questions or need help, call and ask for our portal administrator or e-mail us at

If you are uploading a document from an email request, make sure to select the **Next** or **Submit** button. If you don't, your document won't be sent to us.

The screenshot shows a web interface for uploading documents. At the top, there are three tabs: 'Request 1' (active), 'Request 2', and 'Request 3'. Below the tabs, the text 'IRS Notice' is displayed. The main section is titled 'Upload Document' and contains a dashed border area. Inside this area, the text 'Drag a File Here or' is centered. Below this text are two buttons: 'BROWSE FOR FILE >' and 'SCAN FROM DEVICE'. Underneath these buttons is the text '- Or Add Files From -' followed by three icons: Google Drive, Dropbox, and box. Below the dashed border area, there is a section titled '0 DOCUMENTS ATTACHED' with the text 'No documents to display.' Below this is a section titled 'Additional Comments' with a text input field containing the placeholder text 'Leave a comment for your accountant...'. At the bottom of the form, there is a checkbox labeled 'All Documents Uploaded'. A red circle highlights the 'NEXT >' button at the bottom left of the form.

Our office automatically receives an email when you upload documents to your portal or if you marked the document request as complete.

**You don't need to call or email us to ask if we received your upload.**

If you have any questions or need help, call and ask for our portal administrator or e-mail us at

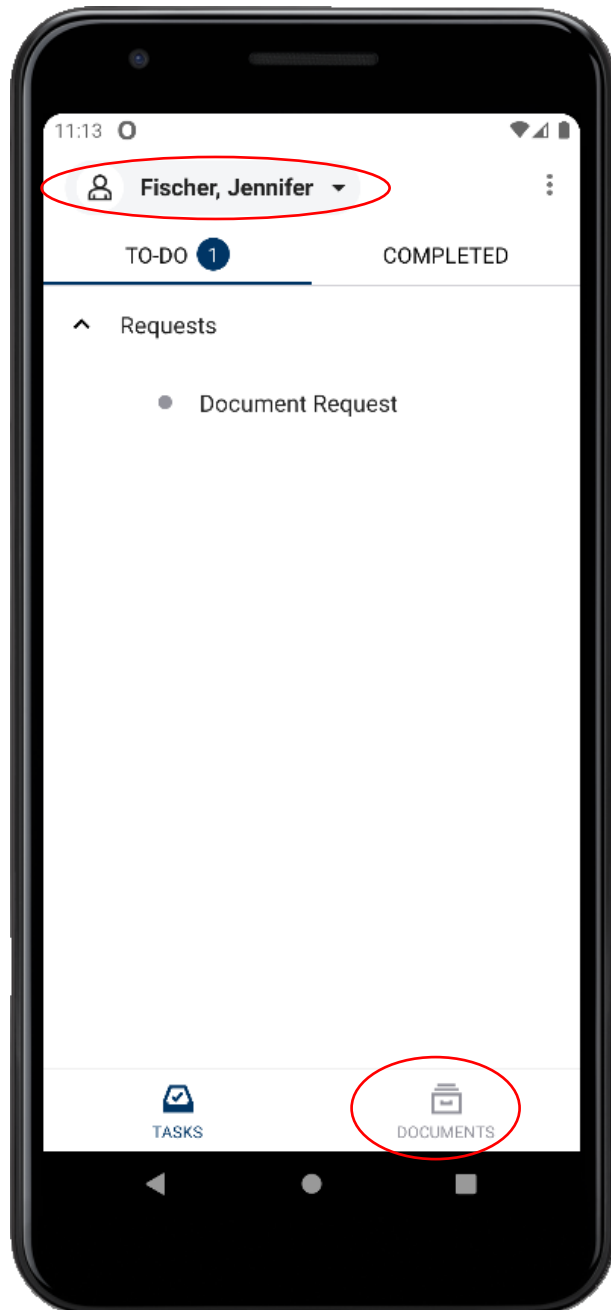


### On a mobile device

You can upload documents to submit to us or reply to our request for specific documents.

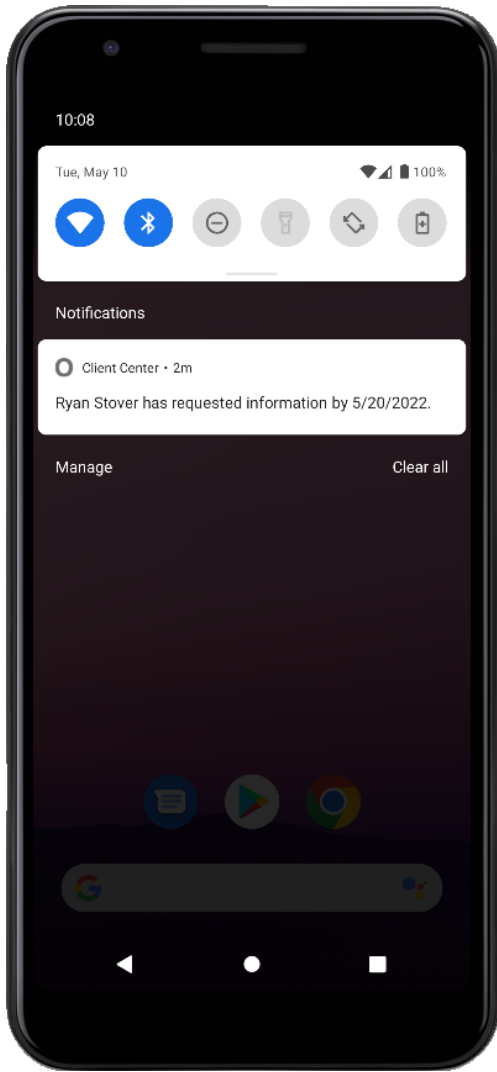
If you have multiple accounts, make sure to select the correct individual or company for the document you're uploading.

Select **Documents** to upload your documents.



If you have any questions or need help, call and ask for our portal administrator or e-mail us at

If we requested a document, you'll get a push notification similar to this:

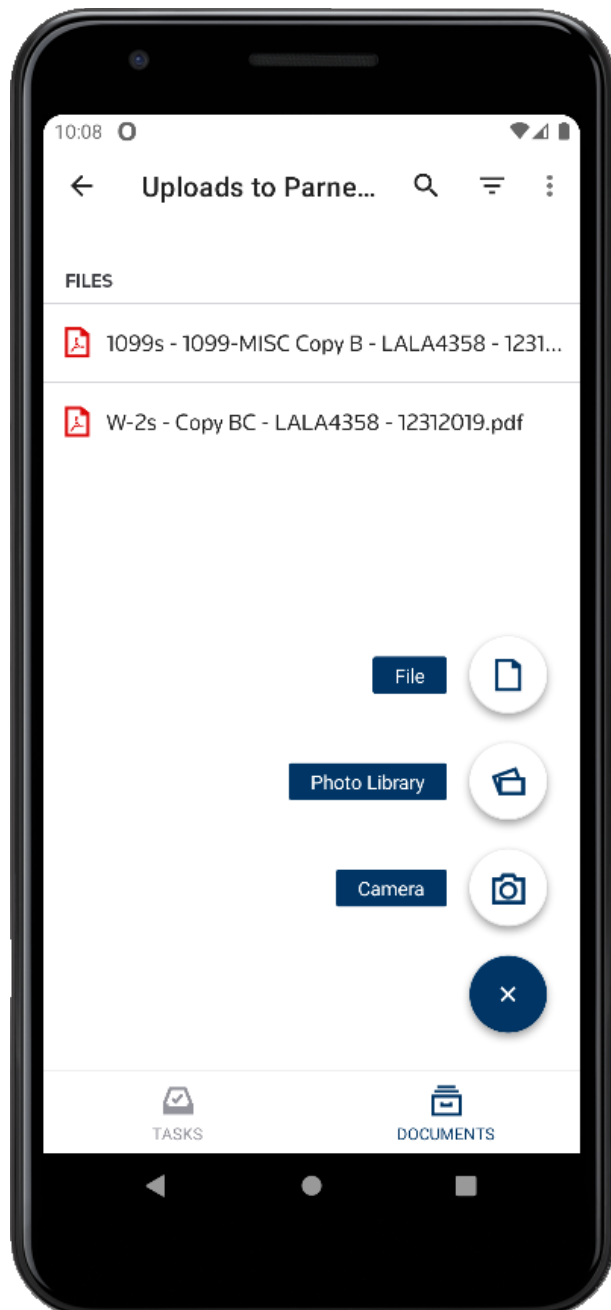


If you have any questions or need help, call and ask for our portal administrator or e-mail us at

You can submit a document if its already saved on your device. Or you can take a picture of the document.

When you use the **Camera** option, the Onvio Client Center app will convert the picture into a PDF for you.

Please note we need all documents in **PDF format only. NO JPEGS OR IMAGE FILES OF ANY TYPE**



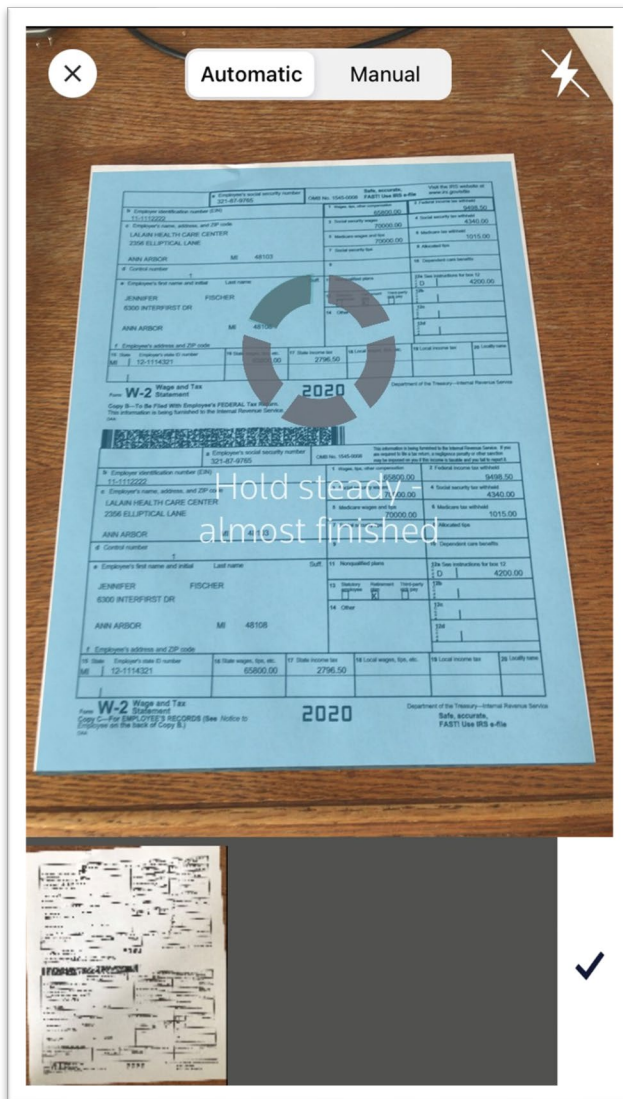
If you have any questions or need help, call and ask for our portal administrator or e-mail us at

We recommend you use the Automatic option when taking a picture of your document to make sure your document is in focus and readable.

**Tip:** Take pictures using as much light as possible

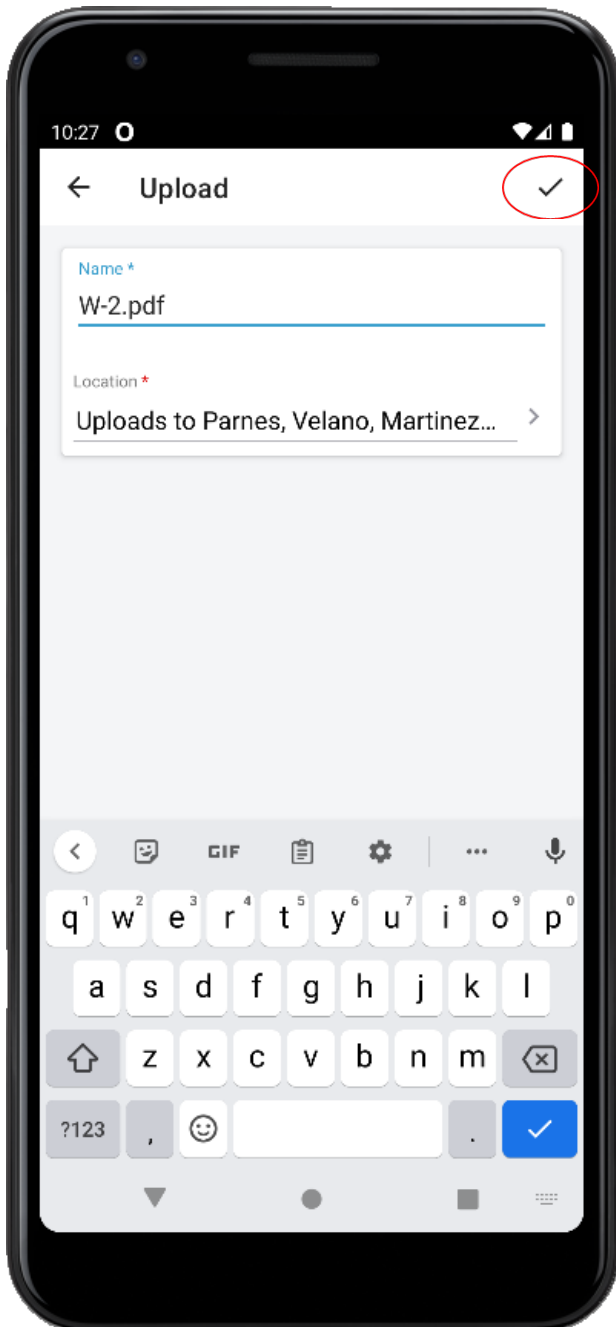
You can take multiple pictures and upload them all at once.

When you're finished taking pictures, select the checkmark icon.



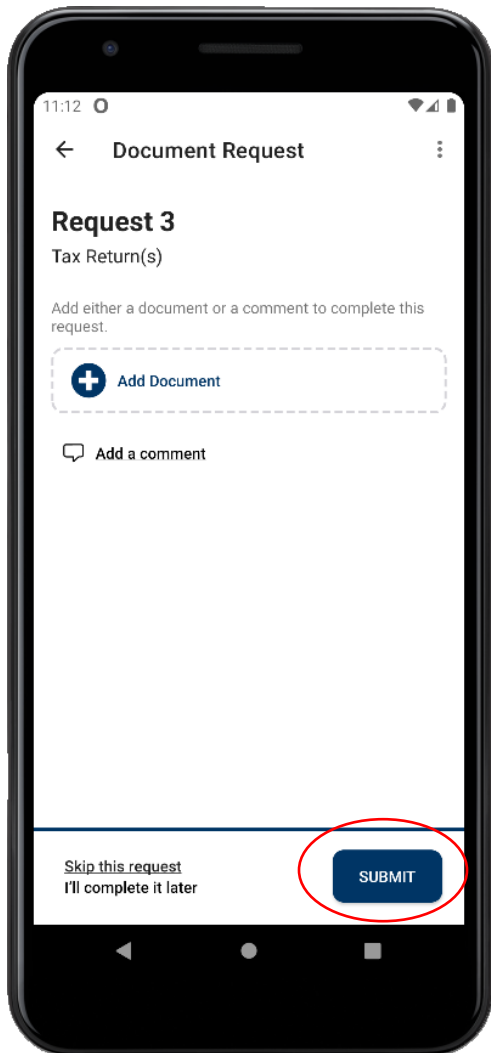
If you have any questions or need help, call and ask for our portal administrator or e-mail us at

Edit the name of the document and location to save it. Select the checkmark icon.



If you have any questions or need help, call and ask for our portal administrator or e-mail us at

If you are uploading a document from an email request, make sure to select the **Next** or **Submit** button. If you don't, your document won't be sent to us.



Our office automatically receives an email when you upload documents to your portal or if you marked the document request as complete.

**You don't need to call or email us to ask if we received your upload.**

If you have any questions or need help, call and ask for our portal administrator or e-mail us at