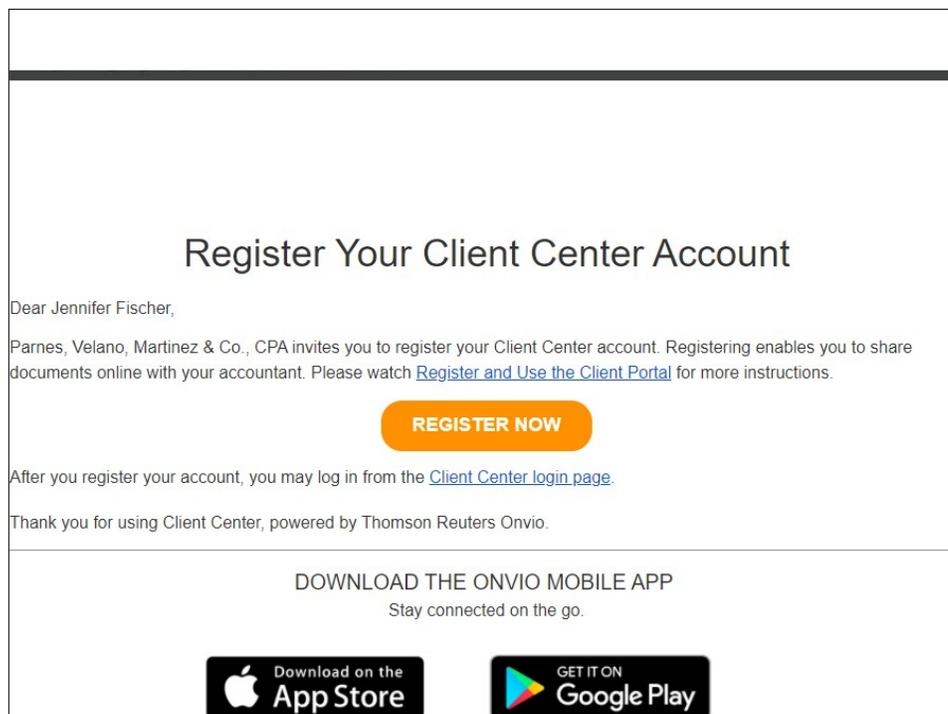# Onvio Client Center quick start guide

Learn how to set up and use your Onvio Client Center portal to complete tasks and send and receive documents from your accountant.

Setting up your Onvio Client Center portal

1. When you receive the email asking you to register your account, select the REGISTER NOW button.

Register Your Client Center Account

Dear Jennifer Fischer,

Parnes, Velano, Martinez & Co., CPA invites you to register your Client Center account. Registering enables you to share documents online with your accountant. Please watch Register and Use the Client Portal for more instructions.

REGISTER NOW

After you register your account, you may log in from the Client Center login page.

Thank you for using Client Center, powered by Thomson Reuters Onvio.

DOWNLOAD THE ONVIO MOBILE APP
Stay connected on the go.

Download on the App Store   GET IT ON Google Play

2. The REGISTER NOW button in the email takes you to a web page where you can change your name and create a password.

> Notes:
>
> Your password must meet the following requirements:
>
> - 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"

Register Your Account

Account Information

First Name *

Jennifer

Last Name *

Fischer

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"

REGISTER ME

3. Select the REGISTER ME button to finish registration.

4. Next, you'll be able to log in to Onvio Client Center using the e-mail address you registered with and the password you just created.

    Although not required, we recommend that you set up multi-factor authentication to best protect your information. Follow the prompt to SET UP NOW to begin setup.
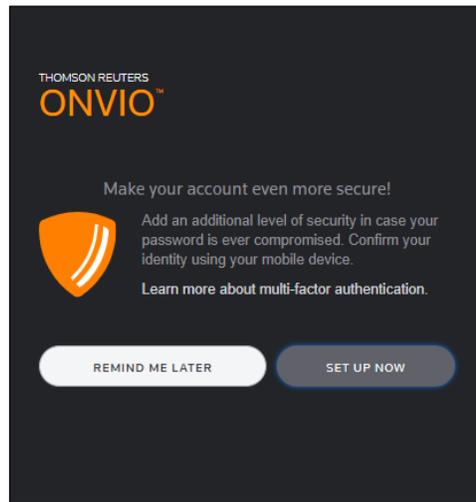
5. Finally, you'll need to read and agree to our terms and conditions for using Onvio Client Center.
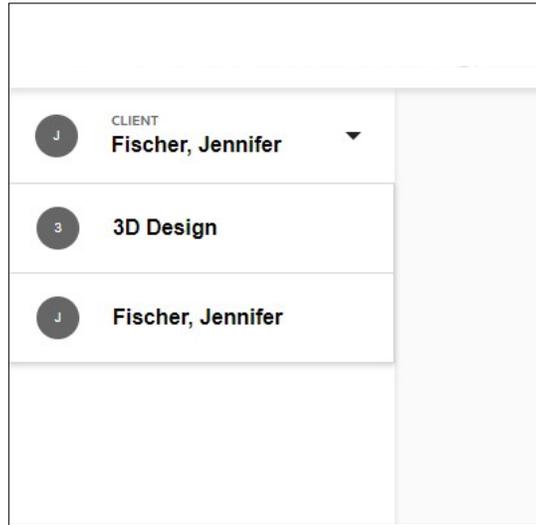
Set up your mobile device

Download the Onvio Client Center mobile app from the App Store or the Google Play Store to access your portal from anywhere.

If you have access to multiple accounts, make sure you choose the correct individual/company before doing anything.

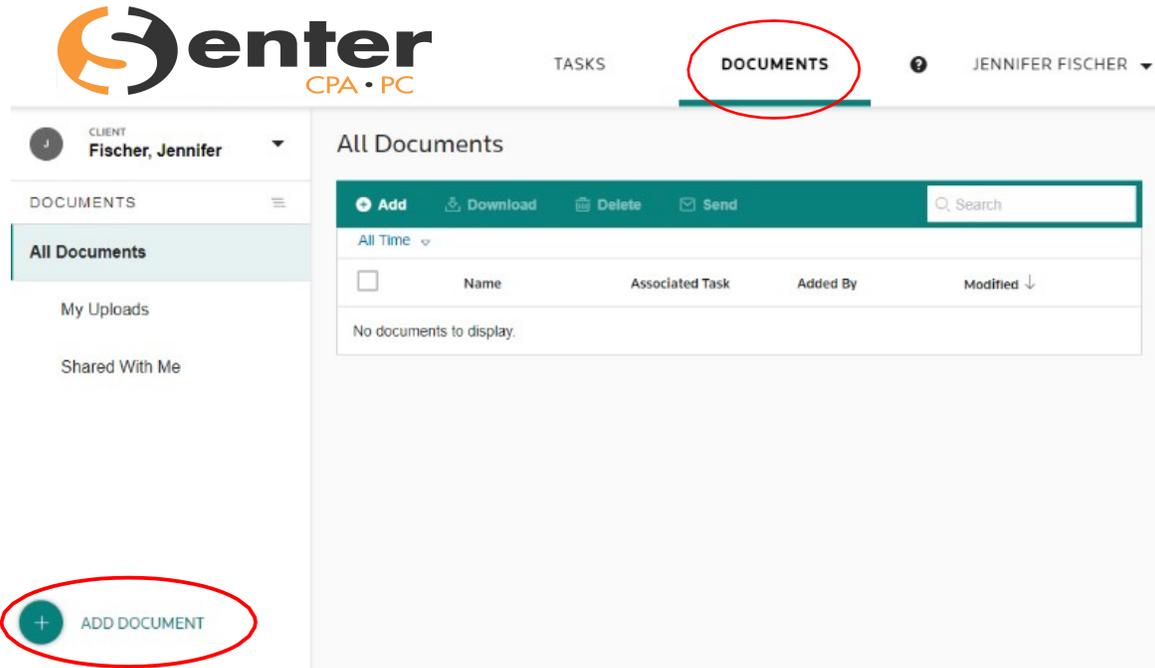If we need a document from you, the portal will send you an email stating that we need additional information.

Follow these steps to send us documents:

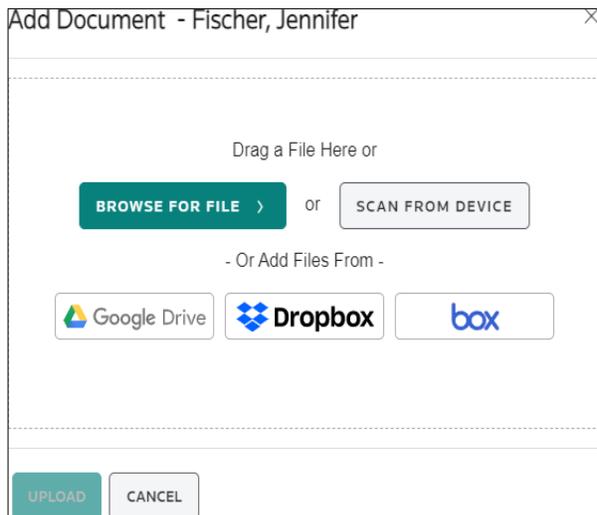1. Click the VIEW REQUEST button to log in to Onvio Client Center.
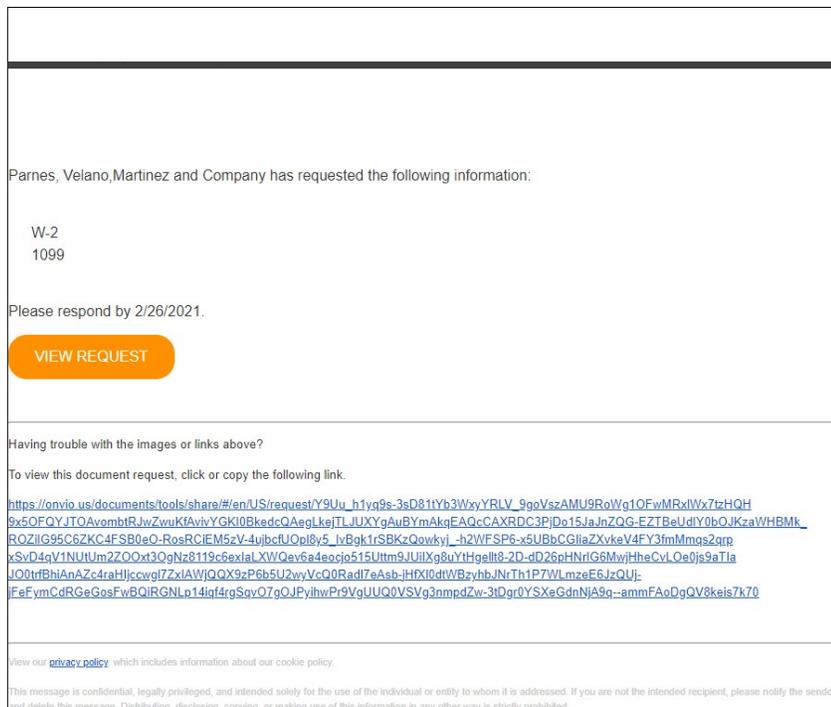
2. You can upload documents by clicking on either the ADD DOCUMENT button in the lower left, or the DOCUMENTS tab on the top.

3. You can upload a PDF file or choose the "Scan from device" button to take a picture of a physical document.

   - Please note we can only accept documents in **PDF format.** We cannot accept JPEG or other image files.

4. Click UPLOAD to add your file to the portal.

5. Make sure you click the Next or Submit button. If you don't, we will not receive your document.

6. Our office then receives an email notification when you upload a document to the portal or if you marked a task complete.

   You don't need to call or email to ask if we received your documents.

Using your Onvio Portal on a mobile device

Notes:

- If you have access to multiple individual or business accounts, make sure you are on the correct individual/company before doing anything else.

- If we've requested a document from you, select the task and follow the steps to upload the document.

- If we didn't request anything but you have a document to give us, tap DOCUMENTS at the bottom.
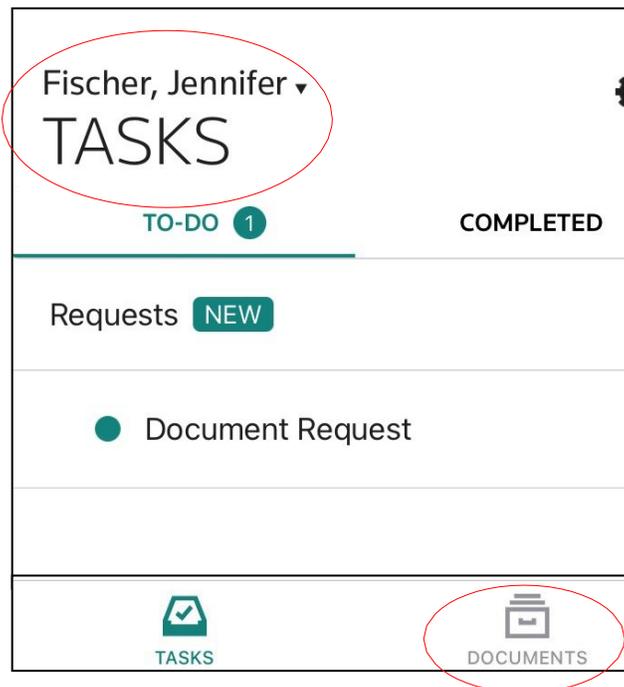
- Onvio Client Center will send push notifications to your phone when you have a new task to complete.
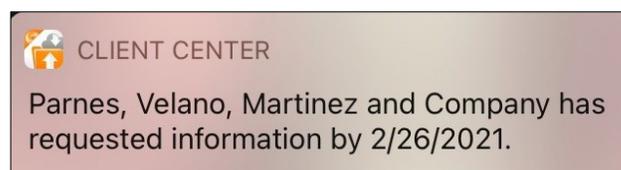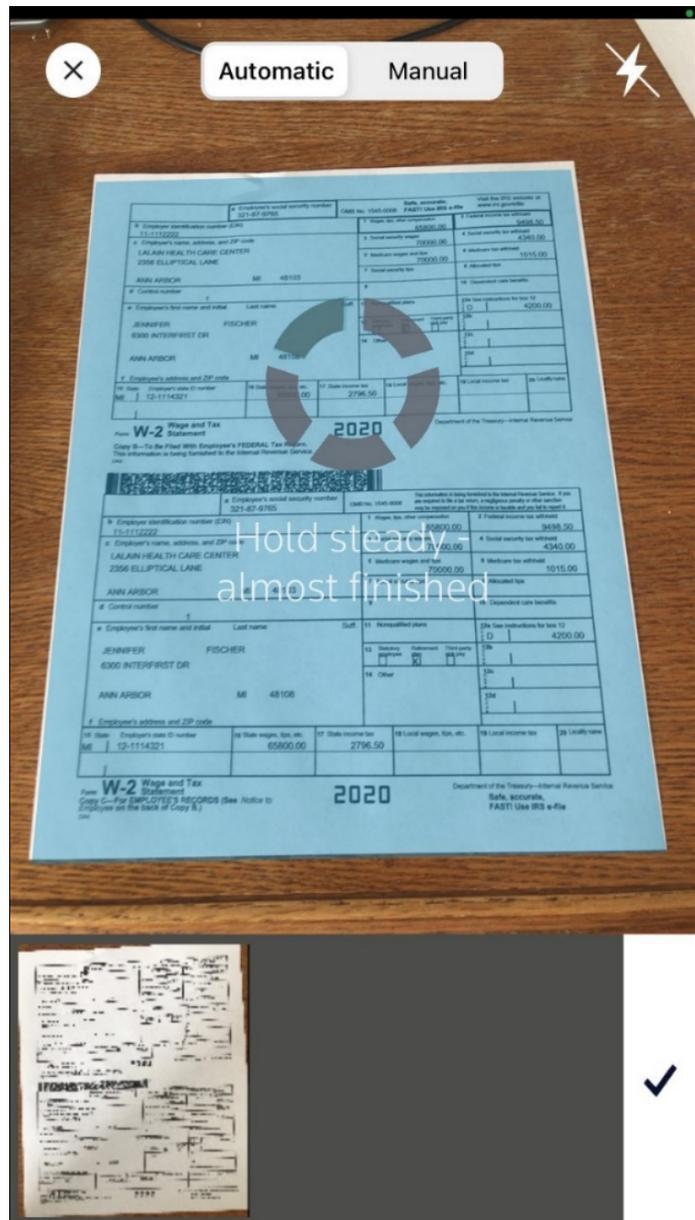
Upload documents

1. You can either choose a picture you already took, or you can choose the Camera option to take a new picture.

2. The camera will give you instructions to help you take a good, clear picture of your document.

   Tips:

   - Take pictures on a dark surface with as much light as possible.

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

3. When you have taken every picture, tap the check mark to move on to the next step.

4. Name the file and change the location (if necessary) and then tap Upload.

5. When you upload a picture, the Client Center app automatically turns it into a PDF.

   - Please note we can only accept documents in **PDF format.** We cannot accept JPEG or other image files.

6. If we requested the document from you, don't forget to tap the Submit button!

   If you don't, we won't receive your document.

7. Our office then receives an email notification when you upload a document to the portal or if you marked a task complete.

   You don't need to call or email to ask if we received your documents.

Cancel   Document Request
                  Due Feb 26, 2021

Request 2

1099

Add either a document or a comment to complete this request.

1099.pdf   ✕
Finishing upload...

⊕ Add document

💬 Add a comment

Skip this request
I'll complete it later.   Submit