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ONVIO™

CLIENT CENTRE CUSTOMER GUIDE

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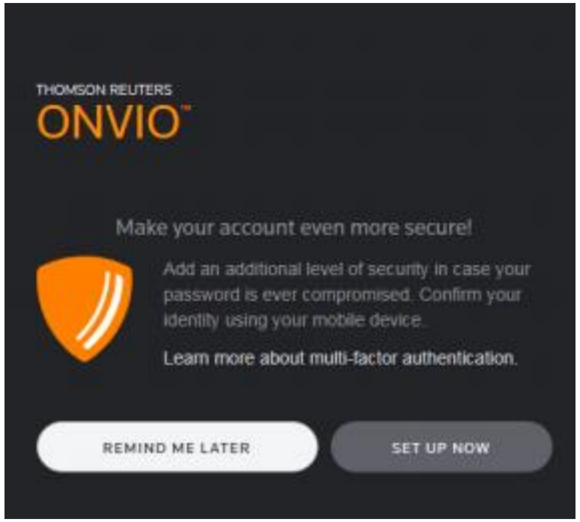
OVERVIEW

Onvio Client Centre allows you to view the documents that your Accountant has shared with you, as well as respond to requests for information and electronically (E-Sign) documents sent to you. You can also add documents to your account, for your Accountant's attention.

Your Accountant will send you an email to register your Client Centre account. To log into Onvio Client Centre, open a browser and enter the URL www.onvio.co.uk into the address bar.

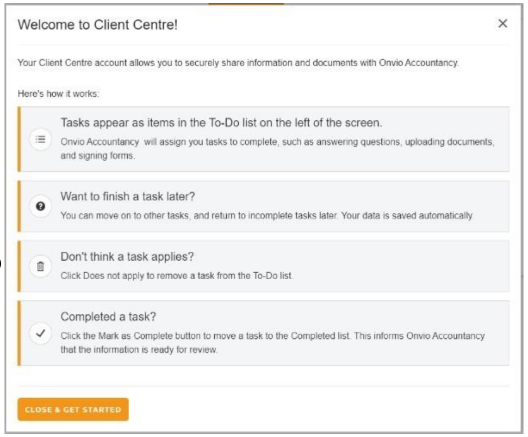
Note: Internet Explorer is not compatible with Onvio Client Centre.

Apple and Android users can also download the phone app 'Onvio Client Centre.' The phone app enables you to take photos of documents and upload them as PDFs, as well as view and respond to tasks sent to you by your Accountant. If you need to reset your password at any point, this can be done on the log in screen of Client Centre www.onvio.co.uk



The first time you log into **Client Centre**, you will be prompted to set up Multi-Factor Authentication (MFA). MFA for Onvio is a two-staged log in. By setting this up, you will be required to enter a password, as well as approve your log in via the Thomson Reuters Authenticator app (available on the App Store and Google Play) when logging into Client Centre. To set this up, choose **SET UP NOW** when prompted. Otherwise, to skip past this section, select **REMIND ME LATER**.

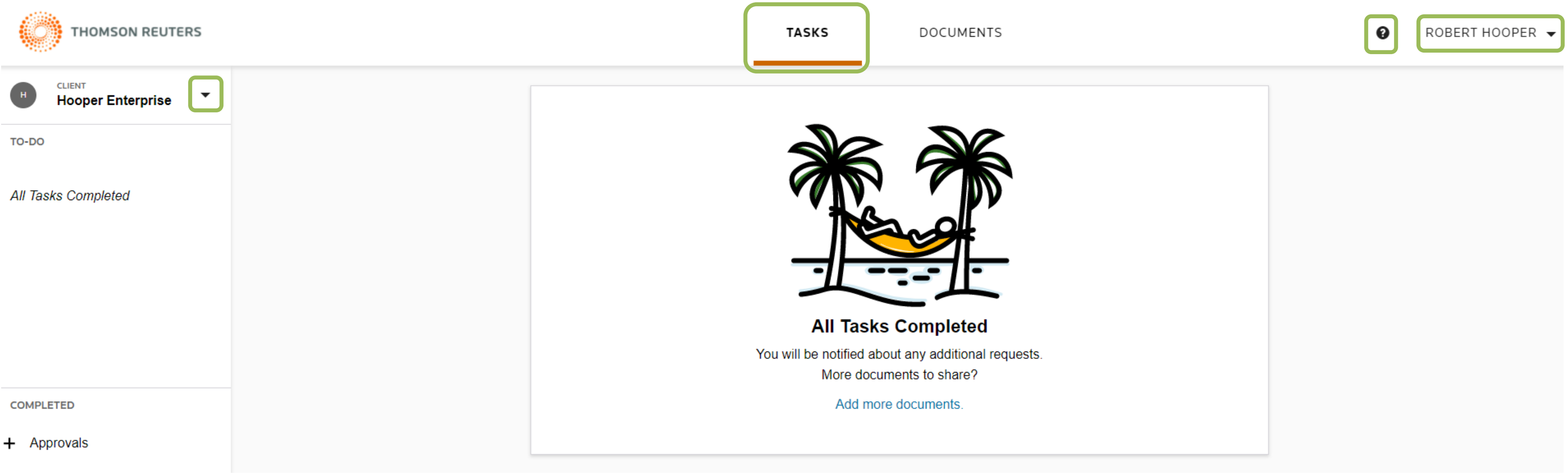
HOME SCREEN



When you log into Client Centre for the first time, you will be welcomed to your account with a brief overview of how to action a task sent to you by your Accountant. To begin, select **CLOSE & GET STARTED**.

In the top-right hand corner of Client Centre, your name displays. Select the drop-down arrow next to your name in order to edit your profile and sign out of your account. Select the '**question mark**' to access additional help resources.

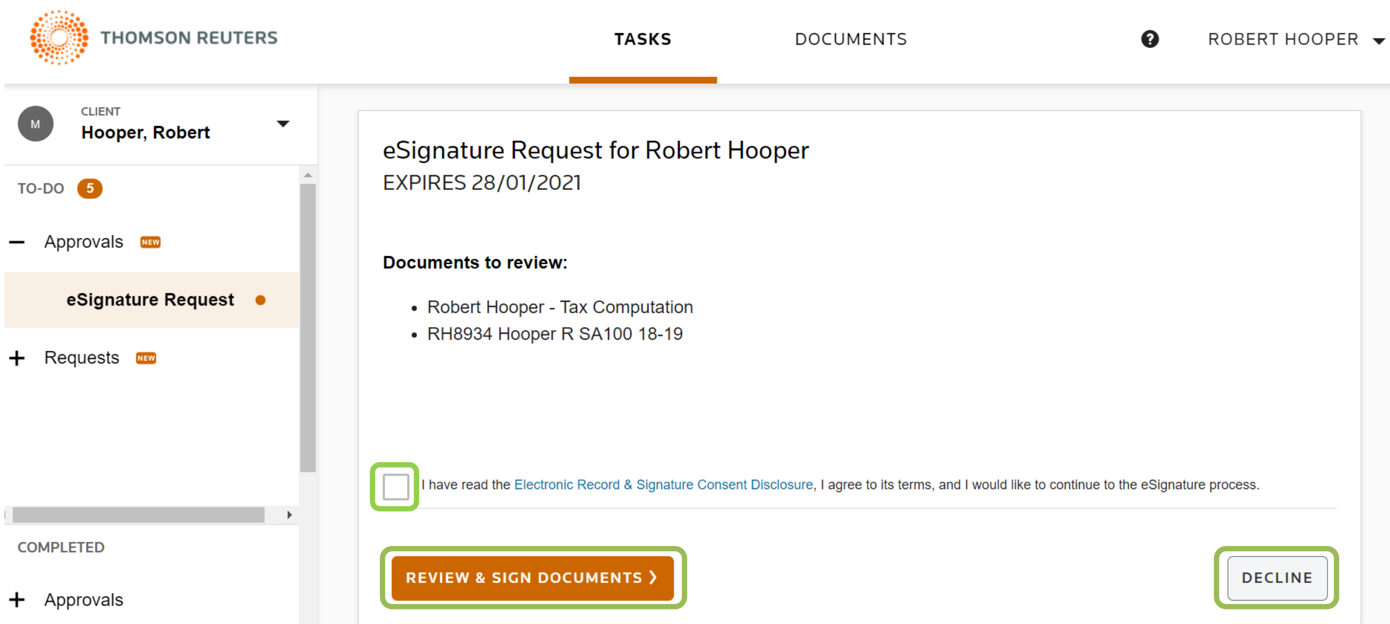
At the top of the screen, your account is split into two sections; Tasks and Documents. Select **TASKS** to respond to a task sent to you by your Accountant. Within the left-hand task pane, you can select from the client drop-down list to view pending tasks sent to you to action on behalf of yourself, as well as your client relationships. An example of a task is a pending E-signature.

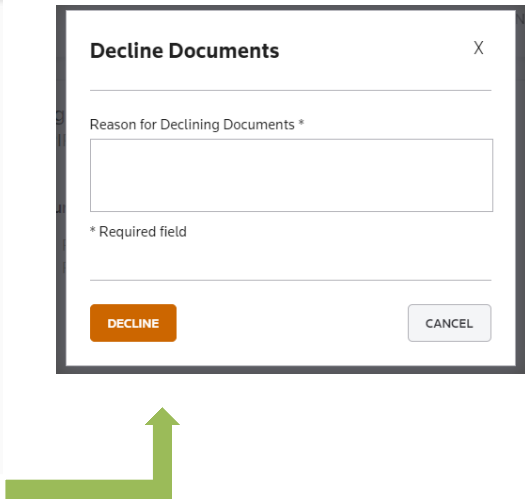


E-SIGNING

When your Accountant sends you an **E-Sign** request, you can use the **E-signing Wizard** to action this and send the signed document back to your Accountant.

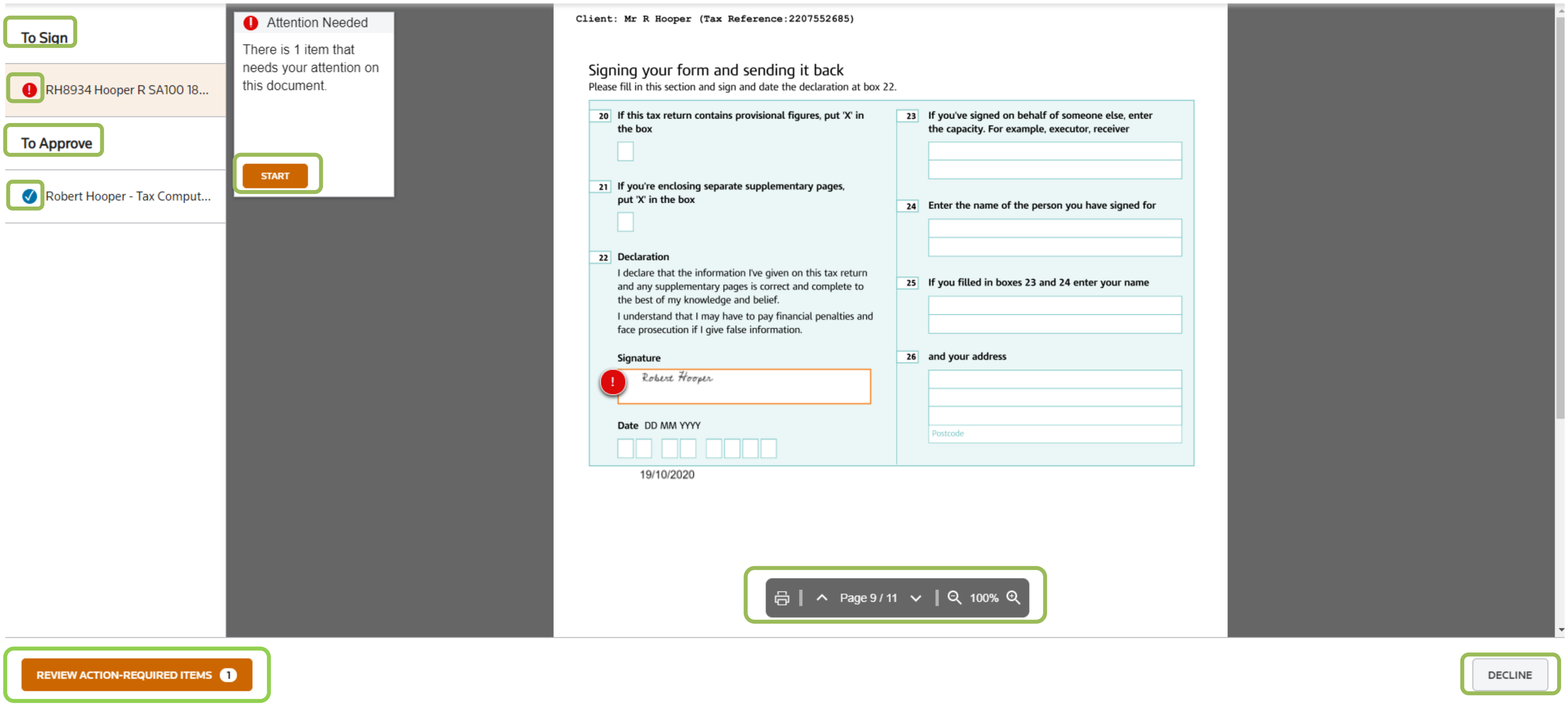
Step 1. The Documents to review are listed, to proceed and review these documents, you must first read the **Electronic Record and Signature Consent Disclosure** by selecting the hyperlink. By then ticking the box, you are agreeing to these Terms and Conditions. To proceed, select **REVIEW & SIGN DOCUMENTS.** To decline the request, select **DECLINE** and add a comment to notify your Accountant.



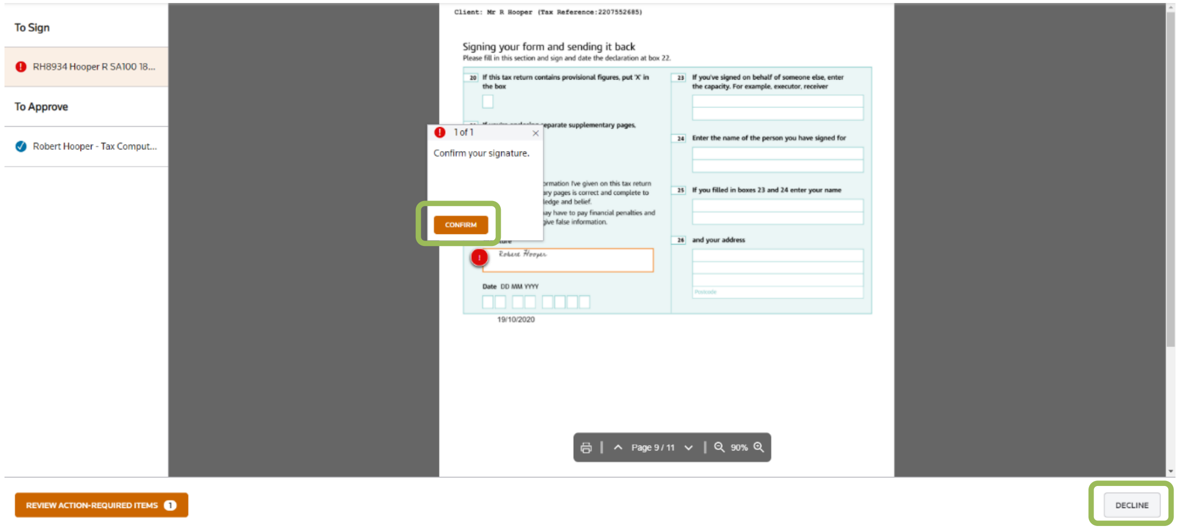


Step 2. Confirm your signature style. Here you can either type, draw or upload an image of your signature which will appear on the signed document. Select **NEXT** to continue to review the documents as well as the confirmed signature style**. Note:** you can choose to submit or decline on the next screen, following review.

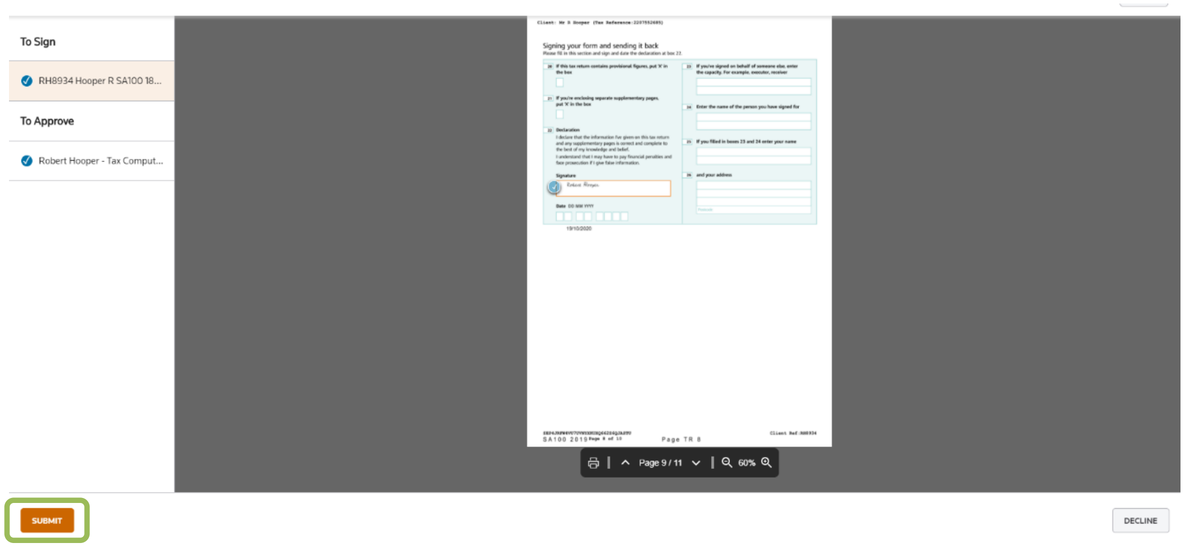
Step 3. On this screen, review and approve the accompanying '**To Approve**' documents listed within the left-hand task pane. Once approved, a blue tick will display next to the document title. Next, select each document beneath '**To Sign**.' You can zoom in and out of the document, navigate between pages as well as print a copy before choosing to E-sign. To E-sign the document, select the **START** button displayed when selecting the document with a pending exclamation mark.



Step 4. You are then taken to the location of the signature, select confirm to agree to E-sign. Alternatively, you can choose to **DECLINE** in the bottom right-hand corner of the screen.



Step 5. Once you have actioned all requests, they will be marked with a tick. **SUBMIT** then becomes available in the bottom left-hand corner. Select **SUBMIT** to complete the request and notify your Accountant of its completion. If they have not already done so, your Accountant will need to share the signed document with you. Once shared, you can access the document beneath the Documents tab, located at the top of your Client Centre account.



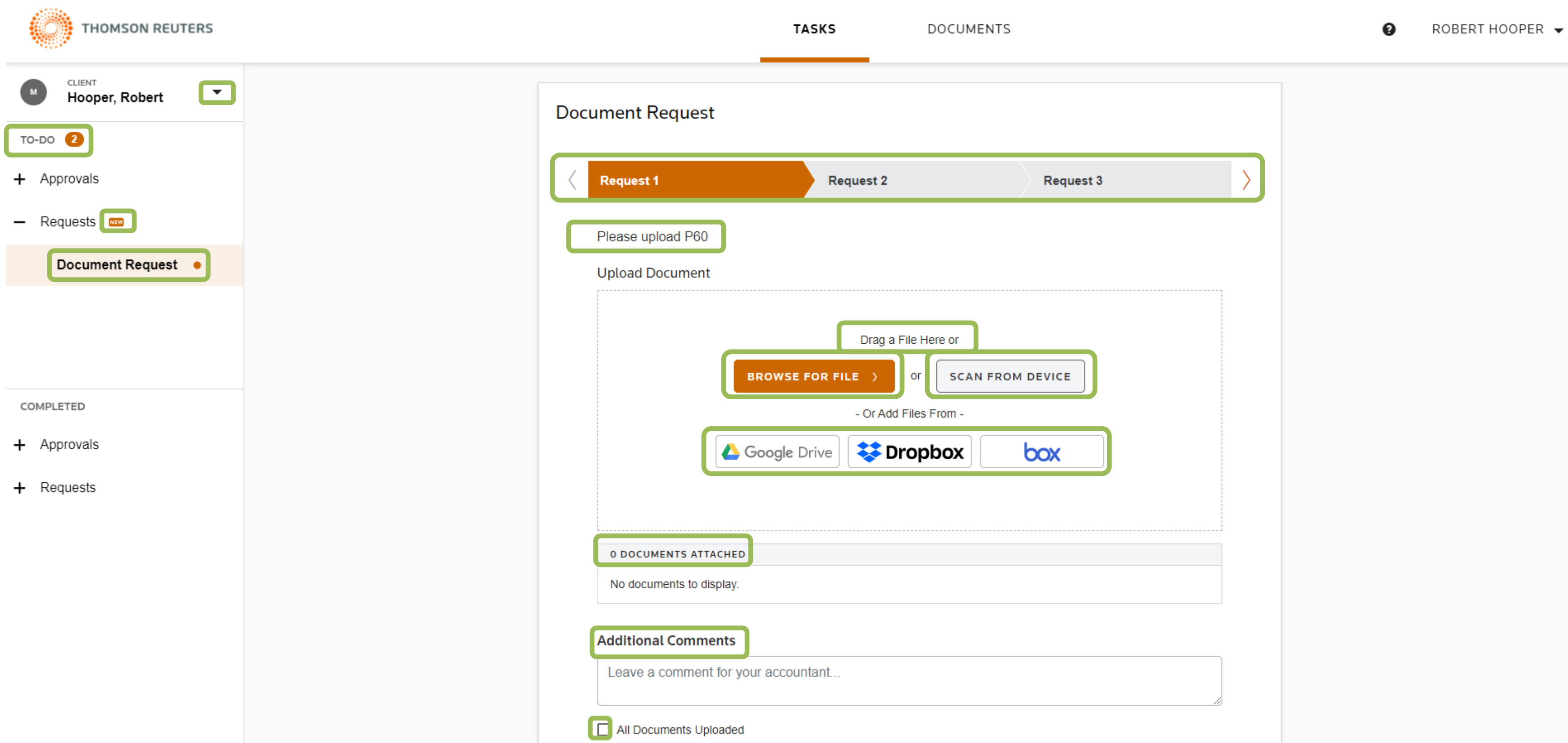
DOCUMENT REQUESTS

Your **Accountant** may send you a **Document Request.** You can use the process below to upload the requested documents, as well as comments for your Accountant's review.

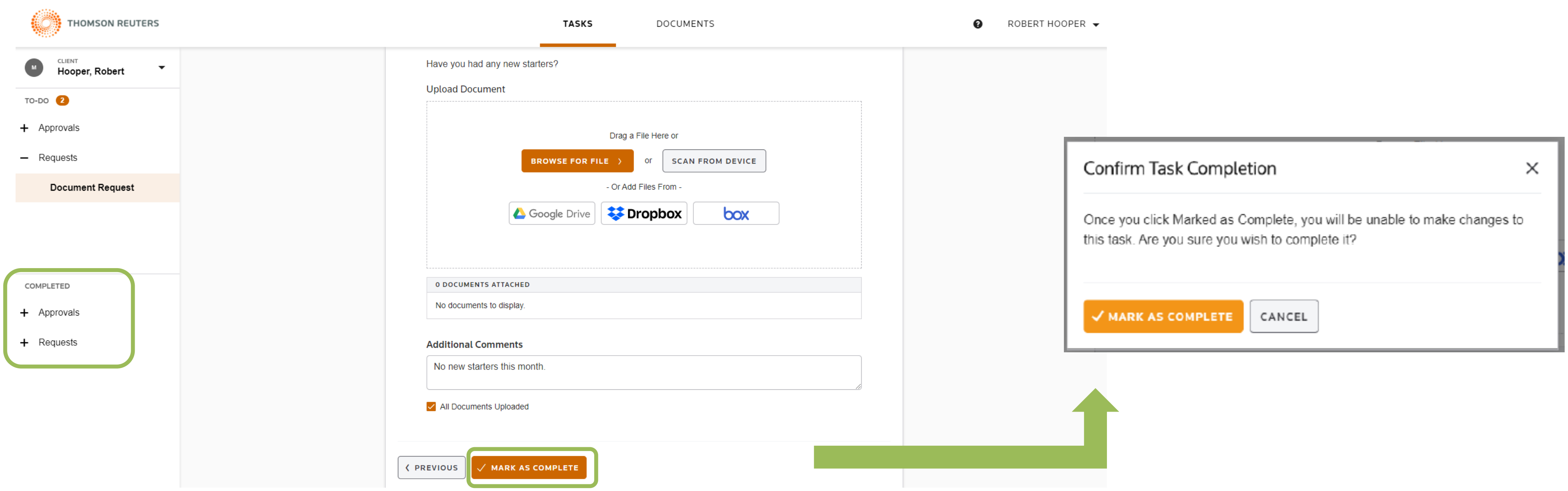
Step 1. Ensure that the correct client is selected by clicking on the drop-down arrow located next to the client name, within the left-hand task pane. Once selected, the pending 'To-Do' items display with the total outstanding as well as a prompt towards the **new** tasks. Expand the '**+**' icon, next to Requests to view the pending **Document Request.**

Step 2. The **Document Request** appears in the central screen with each request available to select at the top, for example, Request 1, 2 and 3. The information being requested is listed, in the example below 'Please upload P60.' Use the **Upload Document** section to add the requested documents. You can select the **BROWSE FOR FILE** button, **DRAG A FILE HERE**, **SCAN FROM DEVICE** for those with the Client Centre phone app, or the **cloud storage** buttons. Once complete, tick '**All Documents Uploaded**.'

Step 3. You can add comments to accompany the request by free typing into the **Additional Comments** box, these will then be visible to your Accountant upon submission.



Step 4. Select **Next** to continue to the next **Request.** Alternatively, you can select each **Request** at the top of the screen to continue**.** Once all information has been uploaded, select **Mark as Complete.** This will notify your Accountant that the documents have been uploaded. The task will then move to the completed section within the left-hand task pane.

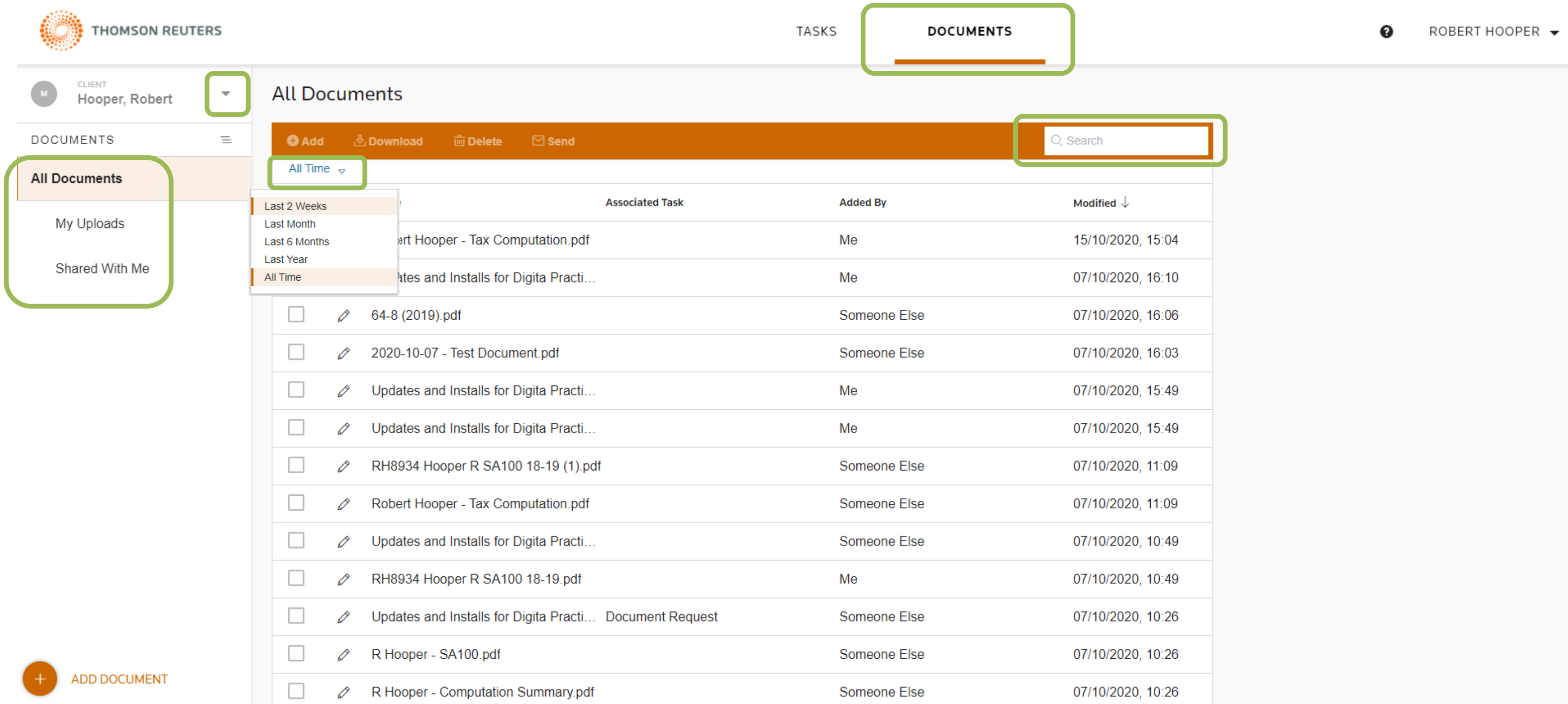


Step 5. After marking as complete you will be asked to confirm. Click **MARK AS COMPLETE** to complete the Request.

DOCUMENTS

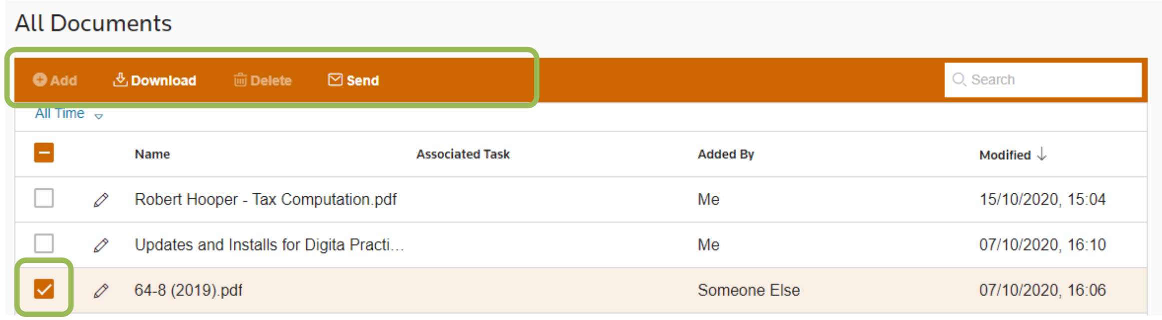
To access documents that your Accountant has shared with you and to upload documents for their attention, select the Documents tab at the top of the screen.

Step 1. You can navigate between your clients by selecting the drop-down arrow located next to the client name, within the left-hand task pane. Once selected, the option '**All Documents'** within the left-hand task pane will display all documents, those that have been shared with you in relation to the selected client, as well as those that you have uploaded. You can separate this search by choosing either **My Uploads** or **Shared with Me**.

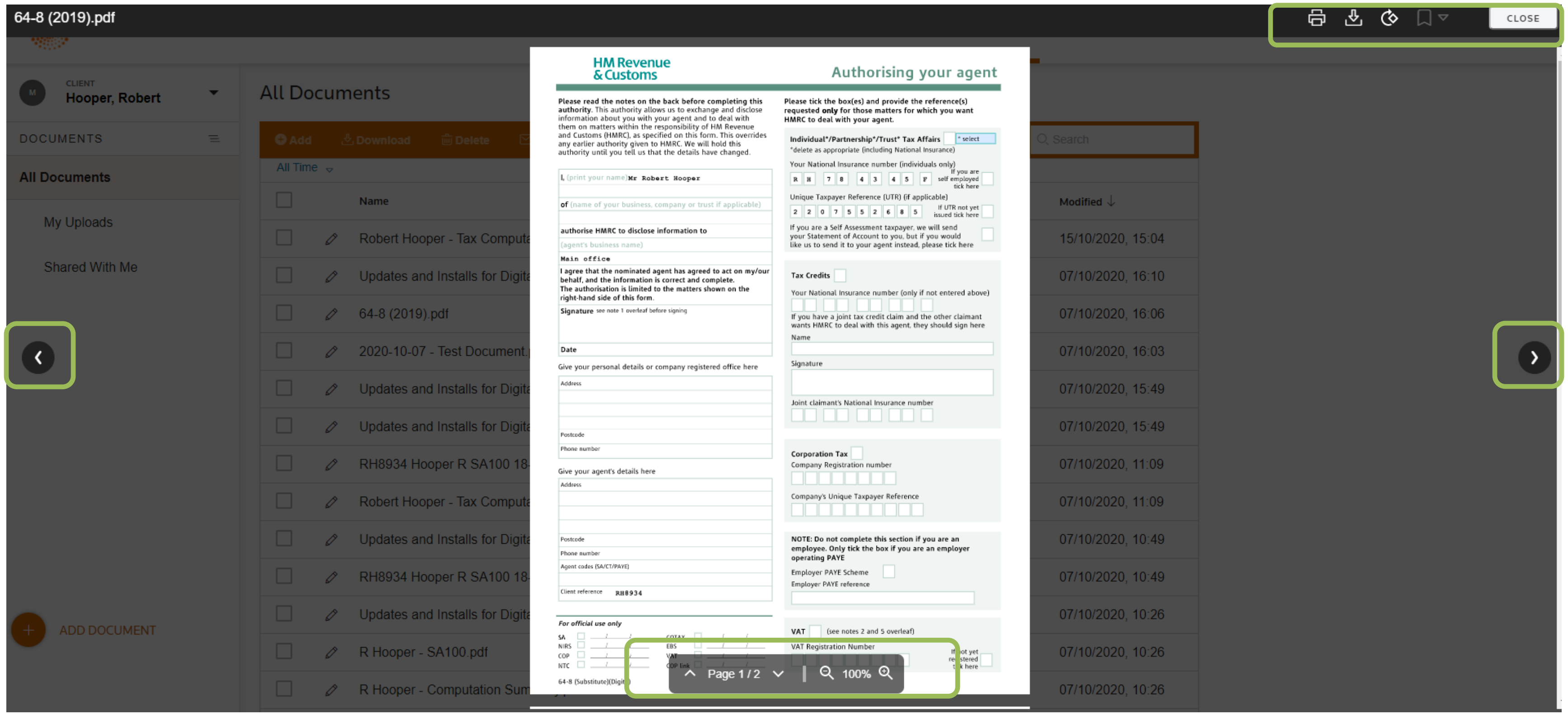


Step 2: To refine the central list, you can select **All Time** to only show documents from the selected time criteria. To search for a particular document, type into the search box located in the top right-hand corner.

Step 3: You can place a tick next to a document and depending on the permissions provided by your Accountant, you can complete one or multiple actions highlighted in white within the toolbar.



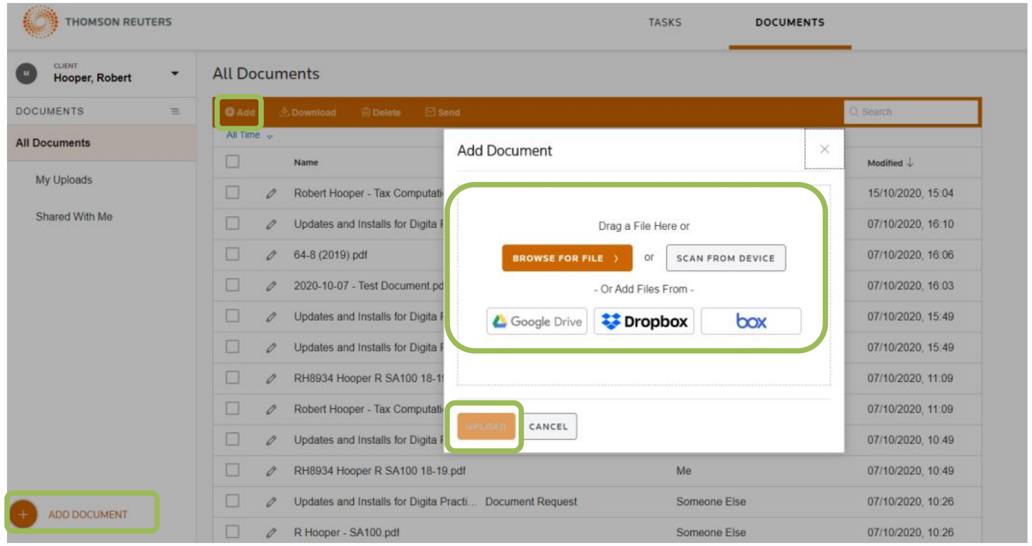
Step 4: To view a document on screen, select the name hyperlink, or the pencil icon next to the document. The preview screen opens and from here, you can print, download or rotate the document in the top-right hand corner. You can navigate between pages, zoom in and out, as well as use the arrows located on the far left and right-hand sides to preview the next or previous document within the list. To close the preview, select **CLOSE**.



Step 5: To Add a Document for your Accountant's attention, you can select **'Add Document'** in the bottom left-hand corner or **'Add'** from the toolbar.

Once selected, the Add Document dialog will open, where you can choose one of the upload options to select the required document/s.

To upload, select **UPLOAD** in the bottom left-hand corner of the Add Document dialog. Your Accountant will then be notified.



Step 6: Finally, if you wish to see the folder structure that your Accountant has set up, select the three lines located in the left-hand task pane, next to Documents. You can expand the folders on the left-hand side to navigate.