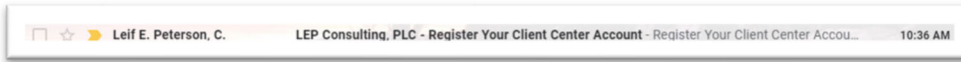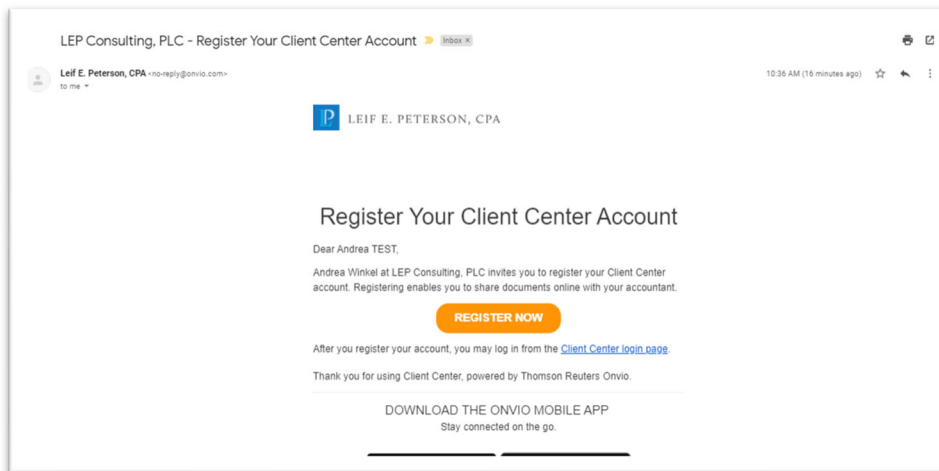LEIF E. PETERSON, CPA

To Access your Onvio Client Center Account:

1. Once invited, you will get an email that looks similar to this

2. Open the email and click Register Now
   a. If on your cell phone, you can also click the link to download the app and register from your phone

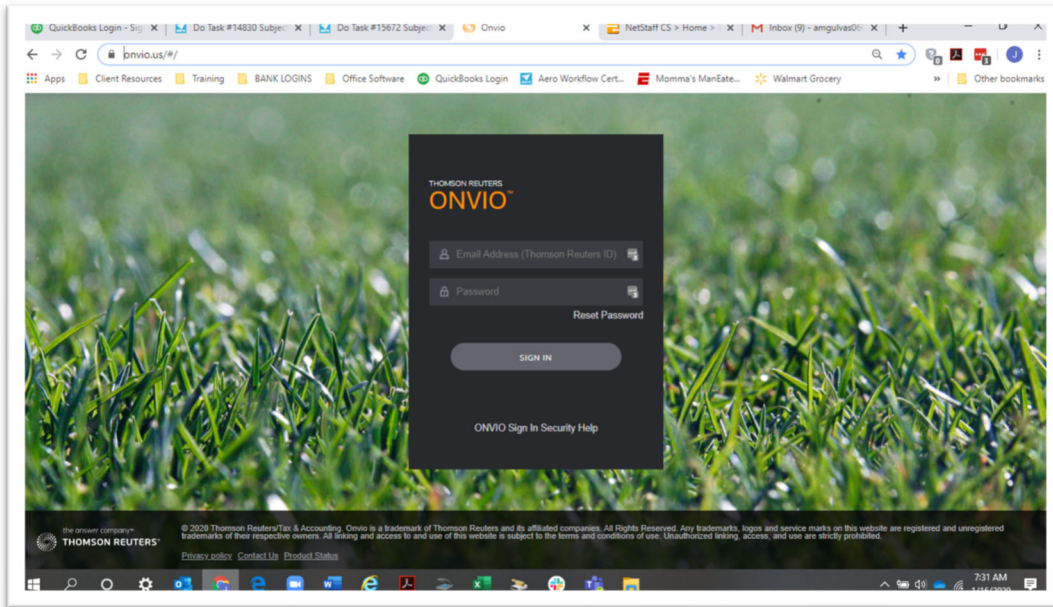3. A browser will open, for you to create your password,
   a. After Setting your password, click Register Now

That's it!
You are now ready to access documents we share with you and securely send us your business documents

LEIF E. PETERSON, CPA

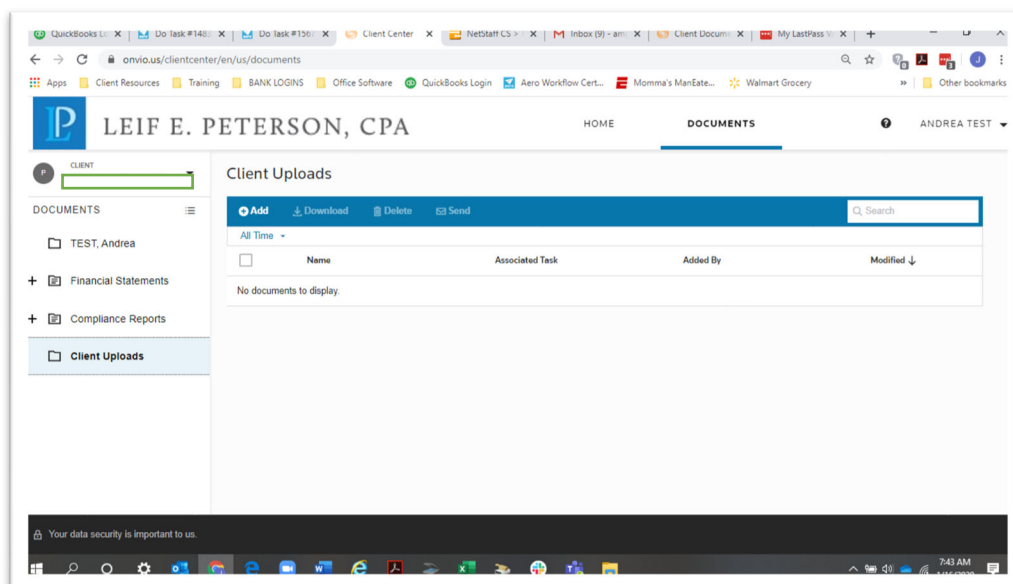# To securely send us documents via a web browser

1. Login to onvio.us
   a. https://onvio.us/#/

2. Once Logged in, please do the following:
   a. Click "Documents"
   b. Toggle to the company you are trying to send documents for
      i. This applies only to users that have access to more than one company
   c. Click the [☰] for easier viewing
      i. We recommend being in simple list view
   d. Click "**Client Uploads**" folder
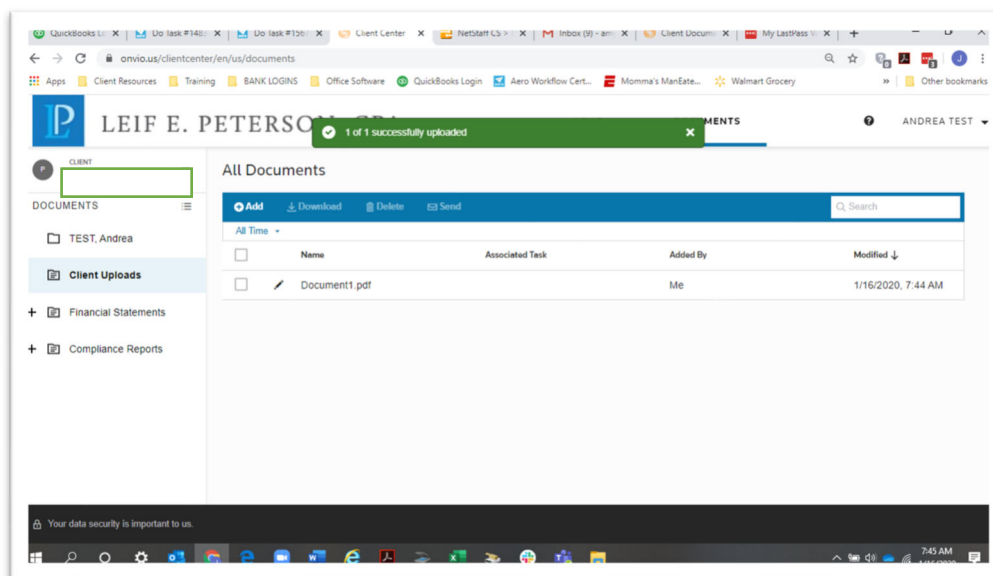
LEIF E. PETERSON, CPA

To securely send us documents via a web browser (cont'd)

    e.   Click Add
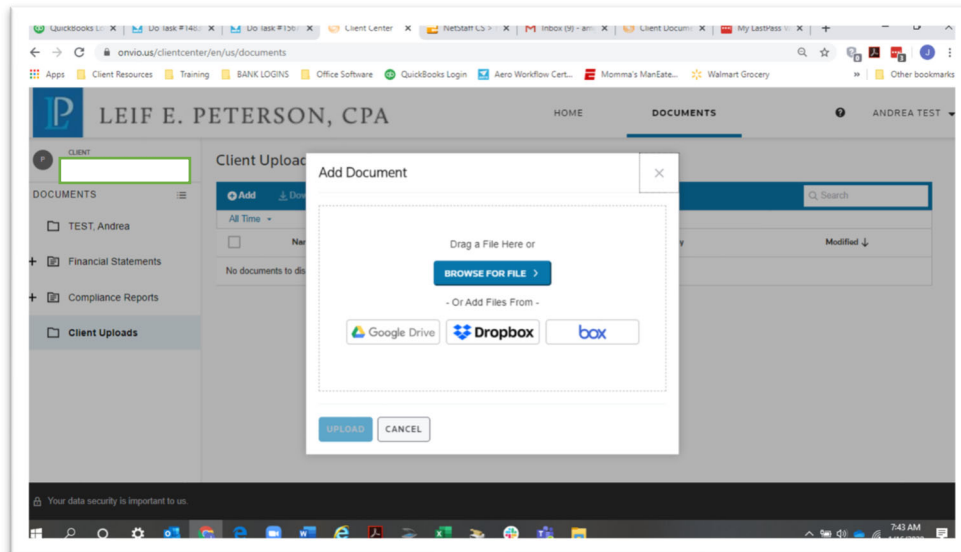
3.   You Can now click browse to locate the files you wish to send, or simply drag and drop

4.   Once your documents have been selected, Click Upload

5.   Once uploaded this screen will appear, informing you that the documents have successfully uploaded

That's it, you are all done!

The accountant assigned to your business will be notified of your upload