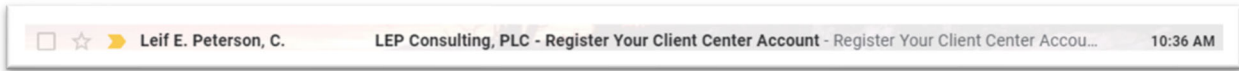


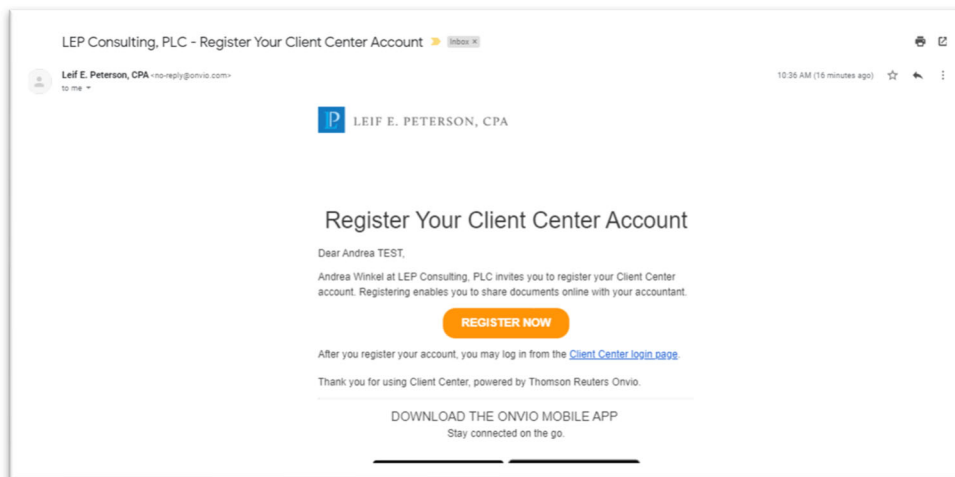


To Access your Onvio Client Center Account:

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, click the link to download the app
 - i. Make sure you download the Onvio Client Center App in the App Store



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

Register Your Account

Account Information

First Name * Last Name *

Email (Thomson Reuters ID)
amgulvas0601@gmail.com

Create Password

New Password * Show typing Password Requirements

✓ Password is acceptable.

Confirm Password * ✓ Password is confirmed.

* Required Field

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"

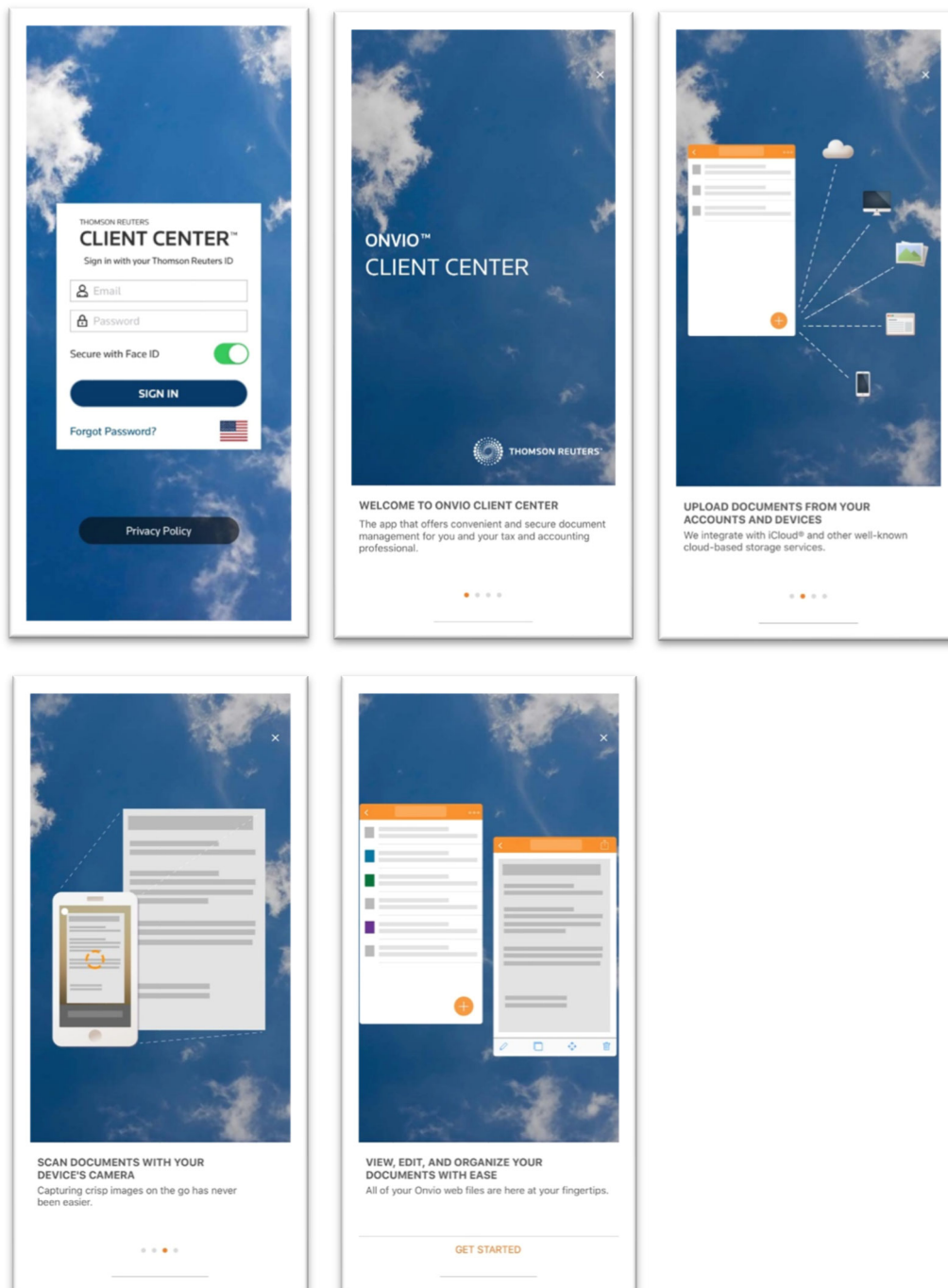
That's it!

You are now ready to access documents we share with you and securely send us your business documents



Opening the App

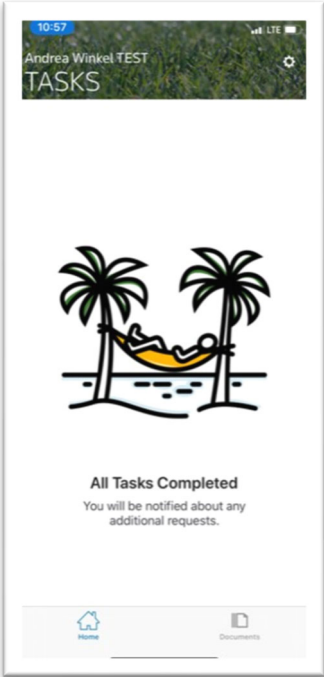
1. After downloading and opening the Onvio Client Center App, you will be prompted to sign in
 - a. You will also be prompted to set up the multi factor authentication
 - i. We recommend downloading the Thompson Reuters Authenticator app, for the easiest access to the app
 - b. Once you do, at the end of the information screens, click get started



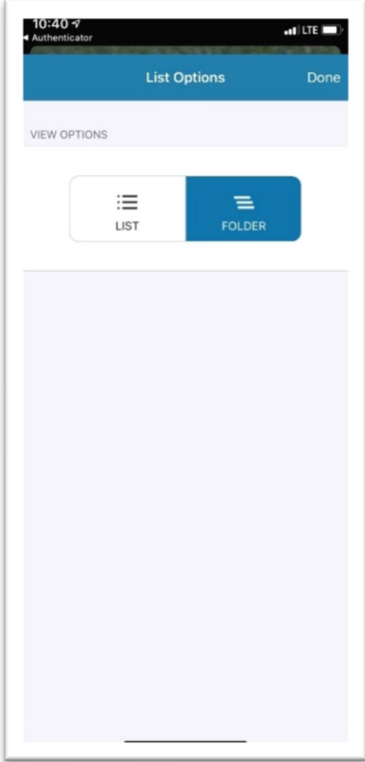
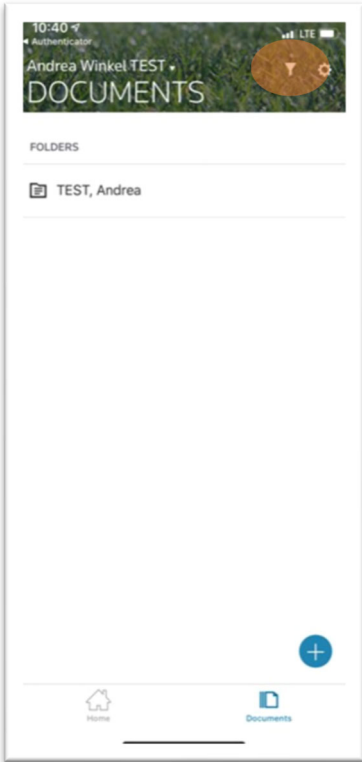


To securely send us documents via the client center app

- 1. Once Logged in, please do the following:
 - a. Click "Documents"



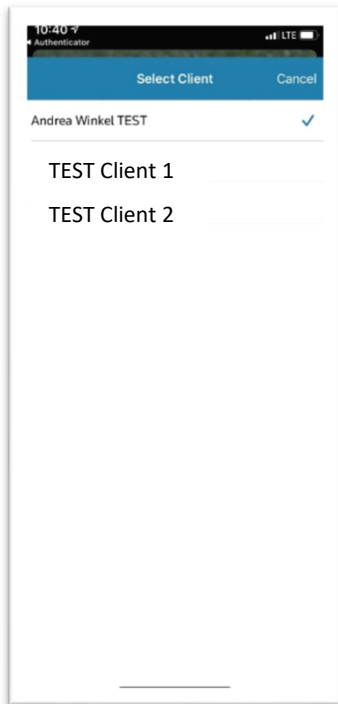
- 2. We suggest clicking the Filter icon, Click Folder option



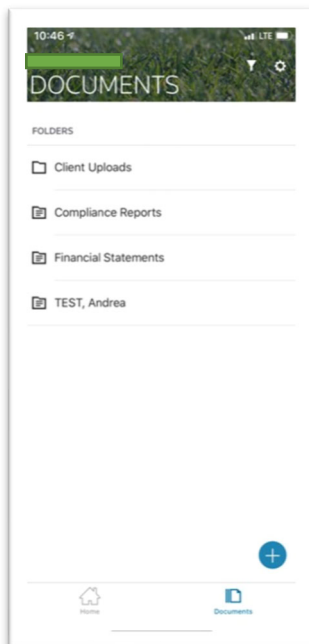


To securely send us documents via the client center app (cont'd)

3. Toggle to the company you are trying to send documents for
 - a. This applies only to users that have access to more than one company



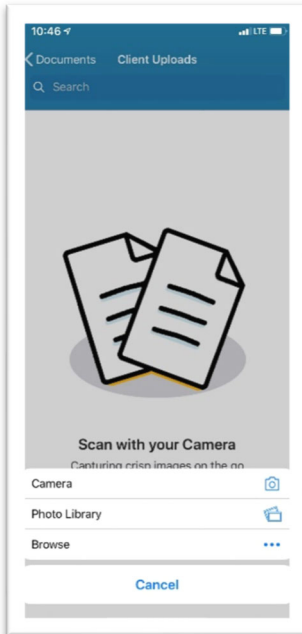
4. Click **“Client Uploads”** folder, then click the **“+”**



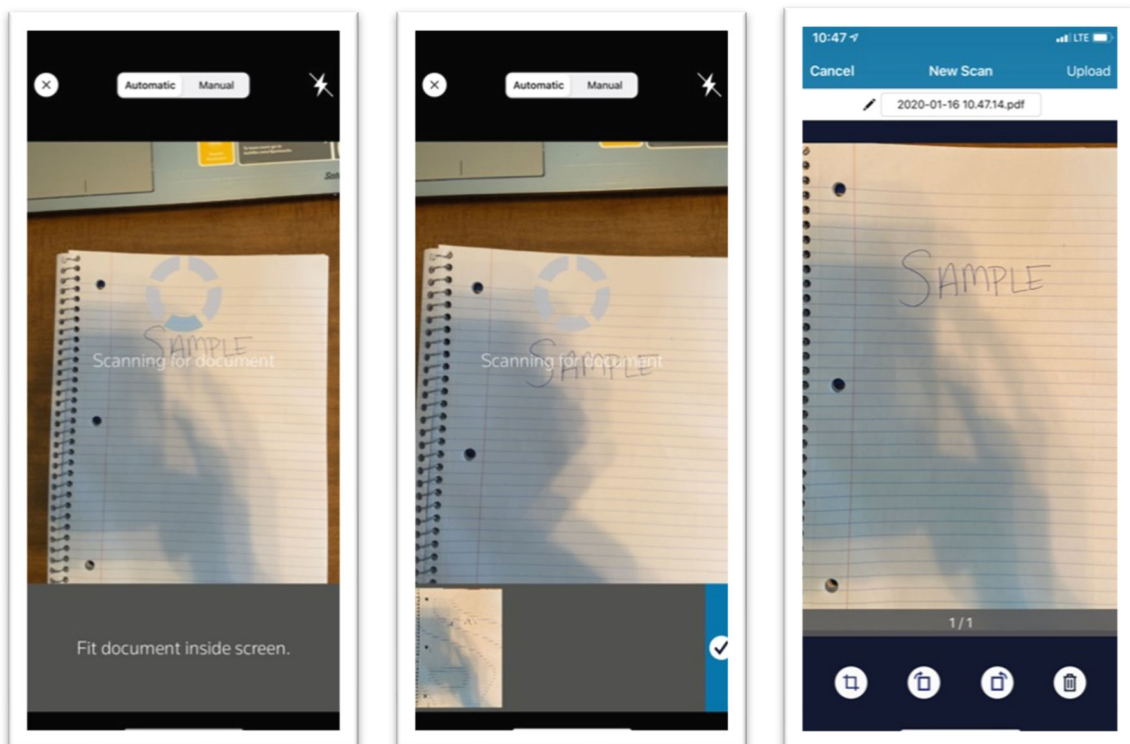


To securely send us documents via the client center app (cont'd)

5. You Can now click either to use your camera, upload a image or browse for a file



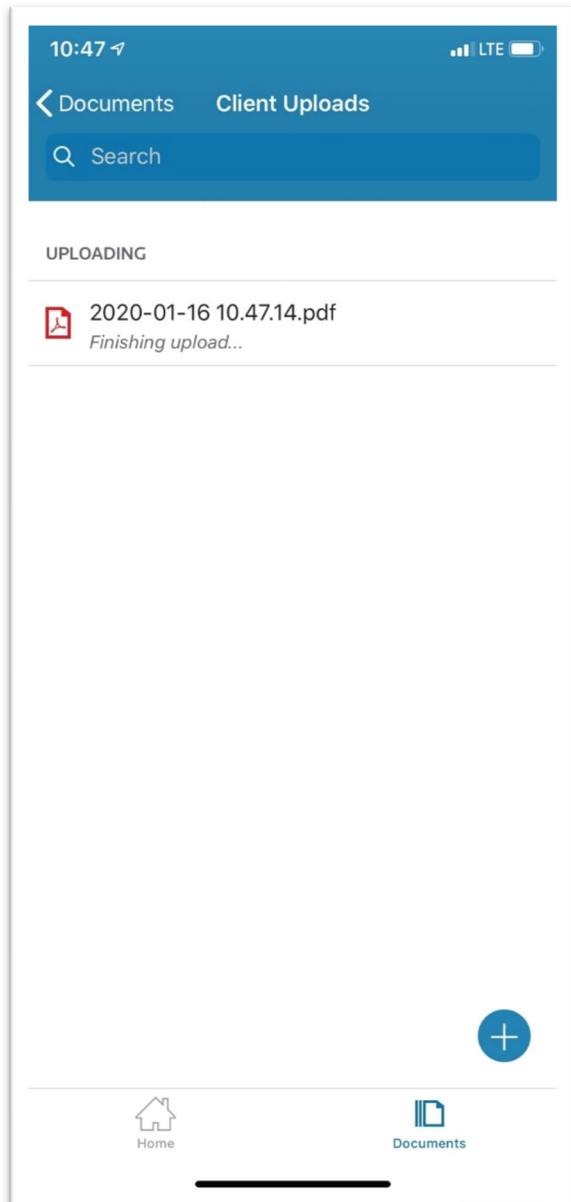
6. Once your documents have been selected, Click Upload
- NOTE - If taking a picture, your phone will try to locate the image automatically, if it is having a hard time then, click manual to take the picture yourself.
 - NOTE – Once the picture is taken you need to select the image to “approve” it, then click upload





To securely send us documents via the client center app (cont'd)

7. 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