

THOMSON REUTERS

ONVIO™

CLIENT CENTRE CUSTOMER GUIDE

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OVERVIEW

The purpose of this document is to assist with the use of your Onvio Client Centre account, including how to access and navigate your account, as well as how to respond to Tasks sent to you from your Accountant. Please note that some of the screenshots and placement of buttons outlined in this document, may differ to your Onvio Client Centre account due to product updates.

Onvio Client Centre allows you to view the documents that your Accountant has shared with you, as well as respond to tasks such as requests for information and to electronically (e-sign) documents. You can also upload documents for your Accountant's attention.

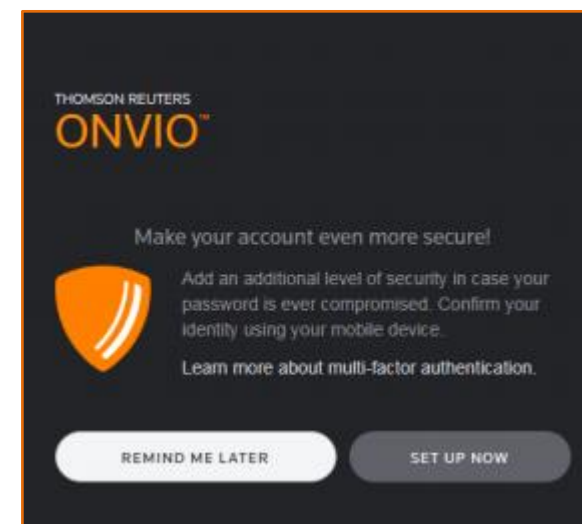
Your Accountant will send you an email to register your Client Centre account. To log into Onvio Client Centre, open a browser and enter the URL www.onvio.co.uk into the address bar.

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

If you would prefer to use a mobile device, 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 Onvio Client Centre www.onvio.co.uk

The first time you log into the 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 the Client Centre. To set this up, choose **SET UP NOW** when prompted. Otherwise, to skip past this section, select **REMIND ME LATER**.

If your Accountant has set Terms and Conditions for use of the Client Centre, these will display on first log in and require your Agreement, to access your Client Centre account.



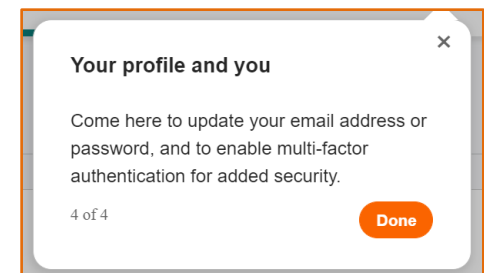
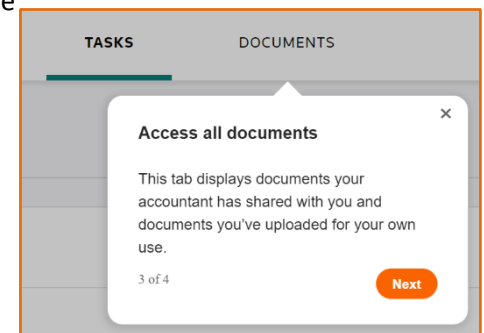
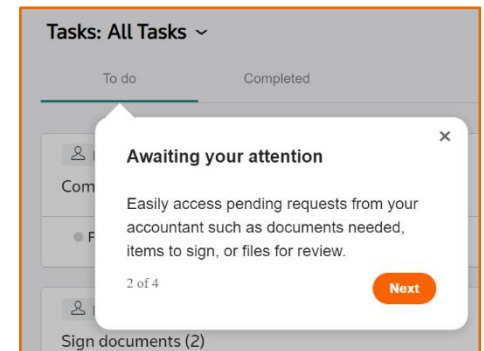
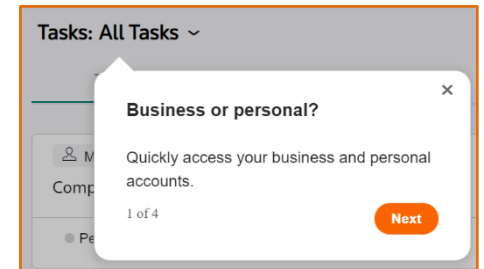


NAVIGATION GUIDE

Upon first log in to the Client Centre and following updates to the interface, a guide will appear on both the **TASKS** and **DOCUMENTS** tabs to assist your navigation.

TASKS

1. **Business or Personal?** From the Tasks drop-down, you can choose to select 'All Tasks'. All Tasks sent to you from your Accountant, in relation to all the businesses and other persons that you act on behalf of, will appear in the To Do list. To refine the To Do list to a Client specific Task, select the drop-down next to Tasks and choose the Client from the list.
2. **Awaiting your attention.** From the 'To Do' list you can view and respond to Tasks awaiting your attention, such as, documents that require your approval and electronic signature or, the completion of your Tax Questionnaire. You can also access your previously Completed Tasks from the Completed tab.
3. **Access all documents.** To view the documents that have been shared with you by your Accountant, either your Personal Documents or Business Documents, or to upload documents for your Accountant's attention, select the Documents tab.
4. **Your profile and you.** Select the drop-down next to your name in the top-right hand corner of your Client Centre account. From here, you can Sign Out of your account, as well as choose to **Edit Profile**.
 - **Account Information.** The Account Information displays the registered email address used to log in to your Client Centre account. If you need to update your email address, amend it here and inform your Accountant of the change, so that all correspondence is delivered to the correct email address. Your name is also displayed here and can be updated.
 - **Password.** If you forget your password, it can be reset from the Onvio log in screen www.onvio.co.uk . To update an existing password, you can enter your current and new password here.
 - **Multi-Factor Authentication.** If you choose Setup Now for MFA when logging into your Client Centre account, the connected MFA device will display, and from here, can be disabled. Alternatively, to add MFA to your Client Centre account, choose 'Add option'. We advise that if MFA is set up, that you generate emergency codes from this screen. Your Accountant also can generate and provide you with a 24-hour Emergency Code to access your account.
 - **Linked Accounts.** This screen displays the Onvio Client Centre accounts that you are an active regtree of.



TASKS

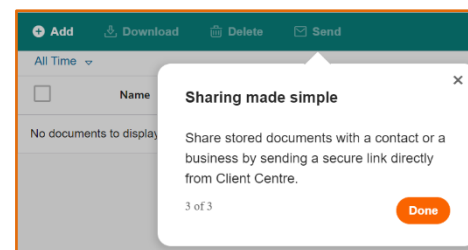
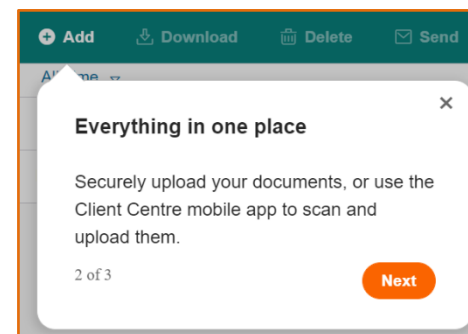
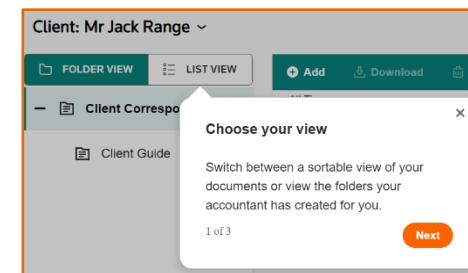
DOCUMENTS

DOCUMENTS

In the top-left hand corner of the Documents tab you can select from the **CLIENT** drop-down, to view and upload documents in relation to a specific Business or Person that you act on behalf of.

1. **Choose your view.** Once a Client is selected, you can choose either the 'Folder View' or the 'List View'. The Folder View displays the folders that your Accountant has shared with you. The List View splits the list of documents by All Documents, My Uploads and Shared with Me. When a document is shared with you, you will receive an email notification.
2. **Everything in one place.** From the Documents tab, you can add documents, in relation to the Business or Person selected. If your Accountant has enabled you to Add a Document into a specific Folder, this can be done from the Folder View. Alternatively, you can choose to Add Document from the List View. Once uploaded, the document will display in My Uploads on the List View. A Folder with your name on it will also auto-create containing the uploaded document, beneath the selected Client within the Folder View. When you add a document, your Accountant will receive an email notification informing them.
3. **Sharing made simple.** The toolbar within the Documents tab allows you to complete various actions, such as Download a document. The Send button enables you to send a secure link and custom message to a recipient, for them to be able to access the document.

To preview a document, select the document name and a preview window will appear. If there are multiple documents available, you can navigate between them within the preview window by selecting the arrows on the left and right hand-side of the screen. To refine the documents on display, you can select the 'All Time' hyperlink beneath the central toolbar to display documents over a specified date range. You can also use the search bar in the top-right hand corner of the panel to locate a document.

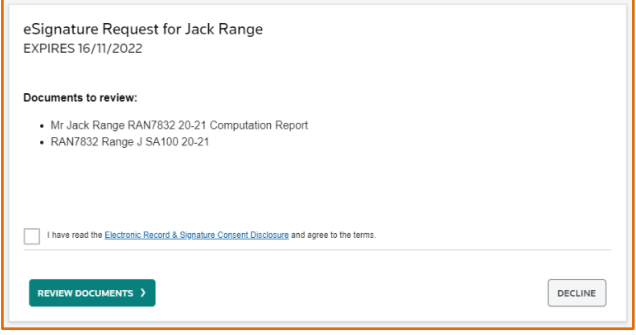


HOW TO RESPOND TO A TASK

When your Accountant sends you a Task, you will receive an email notification and it will appear in your Client Centre Task list as a To Do Task, with the name of the Business or Person the Task relates to highlighted in grey, as well as the Type of Task.

SIGN DOCUMENTS

1. To Review, Approve and Sign the 'Sign Documents' To-Do Task, select Start.
2. The eSignature Request window opens. From here you can see when the Task will expire from your Client Centre account. You can also see the Documents that require your review. To Review Documents, you are required to read the Electronic Record & Signature Consent Disclosure and place a tick in the box to agree to the terms. If you would like to return to this later, you can select Close. Or if you do not wish to agree to the terms, you can select Decline, add a reason why and your Accountant will be notified.
3. To proceed, select Review Documents. You are then required to Confirm your Signature. You can choose Select Style and a pre-defined Signature Style from the drop-down list. You can electronically Draw your own Signature, or you can Upload a pre-set Signature. To continue, select Next.
4. Within the panel, you are prompted to Start the process by Confirming your Signature on the documents To Sign. You also have the option to print the document To Sign as well as zoom in and out on screen.
5. Once the documents To Sign are complete, you are prompted to Approve the supporting documents.
6. To close the Task window to return to the Task later, select Close.
7. To decline the Task and notify your Accountant of the reason why, select Decline.
8. Once all actions are complete, select Submit. Once submitted, you are informed of the staff member that will be notified as well as provided with the option to Download the Signed and Approved documents. If the documents were sent to you from a Shared Folder, you will also be able to access the Signed and Approved version of the documents from the Documents tab.



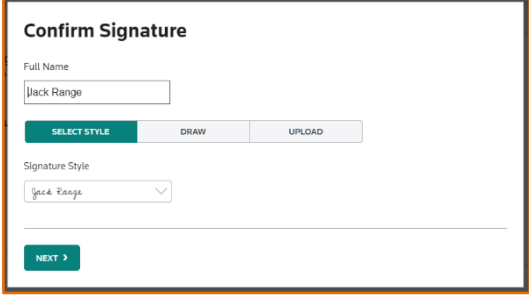
eSignature Request for Jack Range
EXPIRES 16/11/2022

Documents to review:

- Mr Jack Range RAN7832 20-21 Computation Report
- RAN7832 Range J SA100 20-21

I have read the [Electronic Record & Signature Consent Disclosure](#) and agree to the terms.

REVIEW DOCUMENTS > DECLINE



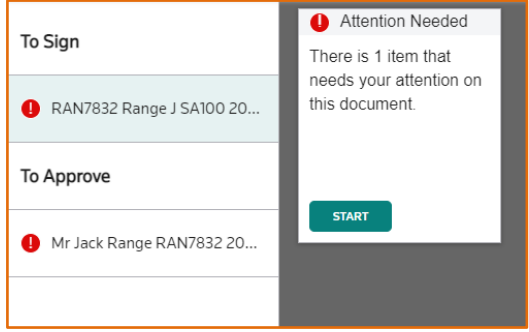
Confirm Signature

Full Name
Jack Range

SELECT STYLE DRAW UPLOAD

Signature Style
Jack Range

NEXT >



To Sign

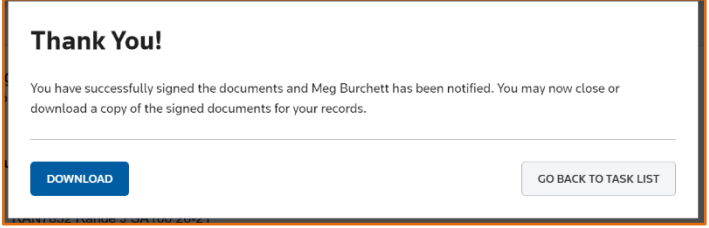
- ! RAN7832 Range J SA100 20...

To Approve

- ! Mr Jack Range RAN7832 20...

Attention Needed
There is 1 item that needs your attention on this document.

START



Thank You!

You have successfully signed the documents and Meg Burchett has been notified. You may now close or download a copy of the signed documents for your records.

DOWNLOAD GO BACK TO TASK LIST

DOCUMENT REQUEST

1. To respond to the Document Request and provide documents and comments, select Start.
2. The Document Request screen opens with Request 1 displayed at the top of the dialog.
3. To respond, you can choose to upload one or multiple documents by either browsing for a file, scanning from your Client Centre mobile app, uploading from one of the available platforms or dragging the file into the Upload Document box.
4. Once a document is uploaded, it will display within the 'attached' section.
5. To add Additional Comments which will be shown to your Accountant, type into the Additional Comments box.
6. To confirm All Documents have been Uploaded for the Request, place a tick in the All Documents Uploaded box.
7. To continue to the next request, select Next.
8. If you do not have a document to upload, as a minimum you are required to add a comment.
9. Once you have reached and completed the final Request at the top of the screen, you can Select Mark As Complete.
10. Once Complete, your Accountant will receive an email notification and will be able to view the documents that you uploaded as well as read your comments.
11. If there is missing information, your Accountant might resend the Task to you with some of the

Document Request

Request 1
Request 2
Request 3


Please upload Bank Statements


Upload Document


Drag a File Here or

BROWSE FOR FILE >
or
SCAN FROM DEVICE


- Or Add Files From -

 Google Drive

 Dropbox

 box

1 DOCUMENT ATTACHED

 Bank Statements.pdf
 Added 23/11/2021, 12:12

Additional Comments

Bank Statements from the past year are uploaded.

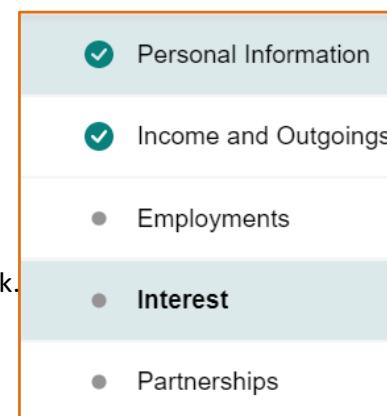
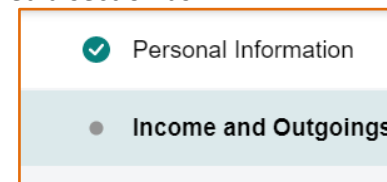
All Documents Uploaded

NEXT >

Requests marked as Complete and the incomplete Tasks available for you to add further information to. If one of the Requests is complete, a message 'This item has been fulfilled or is no longer required' will display. Click Next to locate and respond to the incomplete Requests.

TAX QUESTIONNAIRE

1. The Tax Questionnaire Task enables you to respond to the Request for Personal Tax Information from your Accountant. To begin, select Start.
2. **Personal Information.** The first Task that you are presented with is to confirm your Personal Information, such as your name, address, and email address. Select Yes to confirm if your Personal Information is correct or No if your Personal Information has changed. If your Personal Information has changed, you can add an Additional Comment to inform your Accountant of the change.
3. At any point when completing the Tax Questionnaire, you can select Save Draft and Close to return to it later. Once you have Marked a section as Complete, you are unable to further amend that section.
4. To continue, select Mark as Complete. Once a section is complete, a tick will display next to that section.
5. The next section, Income and Outgoings, displays a tick next to the Income and Outgoings which you had in the previous Tax Year. If one of these is no longer relevant, you have the option to remove the section at a later stage. You can also choose to select any new Income and Outgoings relevant for the current Tax Year. Click through Next until you can Mark as Complete.
6. The Income and Outgoings selected, now display in the left-hand panel. Select each one in turn to review the details of the Income and Outgoing from the previous Tax Year and enter the current Tax Year information. Within each section, you can add supporting documents as well as Additional Comments. Once the Tax Questionnaire is Complete, these will be available to view within the Documents section of your Client Centre account. Your Accountant will also be informed of your responses and will be able to access the uploaded Documents and Additional Comments.
7. Within each section, you can Save Draft or if the section is no longer relevant to the current Tax Year, you can choose Remove Task.
8. Once all Income and Outgoing Tasks are Complete, the Tax Questionnaire will display within the Tasks Completed tab.
9. Select Documents at the top of your Client Centre account to view any documents you uploaded, as well as view your Tax Questionnaire responses.
10. Your Accountant will now be notified that the Tax Questionnaire Task is Complete.



HELP AND HOW TO CENTRE



To access additional help resources for your Client Centre account, select the question mark and review the Suggested Articles or search for relevant content.