Onvio Client Center quick start guide

Within this guide, you'll learn how to set up and use Onvio Client Center.

Set up your Onvio portal

You'll get an email similar to the following.

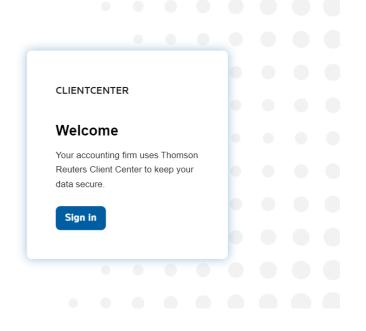
1. Select Register Now

PVM PARNES VELANO MARTINEZ & CO
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 Google Play

2. Make sure your account information is correct, and then create a password for your account

Account Information		
First Name *	Last Name *	
Jennifer	Fischer	
Email (Thomson Reuters ID)		
Create Password		
New Password *	Show typing	Password Requirements
		Your password must have at least 8 characters and 4 of the
 Password is acceptable. 		following:
		 At least 1 number (0-9) At least 1 lowercase letter (a-z)
Confirm Password *		At least 1 uppercase letter (A-Z)
		 At least 1 special character (punctuation): `~!@#\$£ % ^ & * () + = {} [] \ :; "', .?/
 Password is confirmed. 		Your password should not use:
		words from the dictionary
* Required Field		your user ID
		 sequential letters or numbers such as "abc" or "123"

3. Select Register Me, and then Sign in.



4. Enter the email you used to register with and the password you chose.

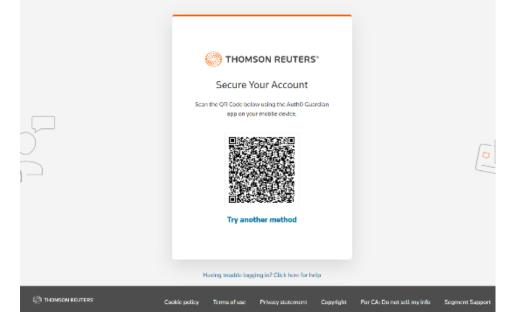
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Sig	gn in to Client (Center
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		0
Reset your	password	
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5. You're required to set up 2SV to use your Client Center portal. First, install the Auth0 Guardian app from the App Store (iOS devices) or Google Play Store (Android devices).

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If you already have an authenticator app and would rather use that, select **Try Another Method**, choose a supported option, and continue the setup. The steps in this guide are for the Auth0 Guardian app method.

6. Scan the QR code displayed in your computer screen to pair your new Client Center account with the Auth0 guardian app on your mobile device.



7. Accept the Terms and Conditions for using Client Center.

Terms and Conditions	
	Cancellation Policy
	Fees and expenses paid under our agreement are nonrefundable and will not be prorated. You may cancel one of more of the Services at any time by submitting written notice to our firm.
	Confidentiality
	Like all provides of personal financial services, tax professionals are required by law to inform clients of their policies regarding the privacy of client information. Our fine malteres to predestatis tackardic of condensitability that are even more stringent than those required by law. The only nonpublic personal information we collect is information that you provide to us or information that we obtained with your authorization.
	We do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures might include providing information to our employees or, in limited altuations, to unrelated third parties that need the information to assist us in serving you. In all situations, we stress the confidential nature of the information being shared.
	Limited Liability
	Our firm shall not in any event be liable for any incidental, indirect, special, punitive, or consequential damages (including lost profits) that you or others may experience as a result of or relating to this agreement or the use of this service, even if we advised you of the possibility of such damages.
	By clicking "I Agree", you indicate that you agree to these Terms and Conditions. AGREE DISAGREE

Set up your mobile device

You can download the **Onvio Client Center app**, to use your portal on your mobile device instead of needing to sign in on a computer.

Onvio Client Center Thomson Reuters Business	
Download on the App Store	Google Play

How to use Onvio Client Center

On a computer

To access your portal, visit our firm's website www.ueckerschultz.com and select the CLIENT PORTAL tab. Here you can upload documents to submit to us, or reply to our request for specific documents.



If you have multiple accounts, make sure to select the correct individual or company for the document you're uploading.

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New our privacy policy, which include	tes information about our cookie policy.
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Select **View Request**, and then select **Add** in Onvio Client Center to upload your documents.

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You have the option of submitting saved documents via PDF or scanning from a device.

• Please note we need all documents in PDF format only. NO JPEGS OR IMAGE FILES OF ANY TYPE

Add Document - Fischer, Jennifer	
Drag a File Here or BROWSE FOR FILE > Or SCAN FROM DEVICE	
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UPLOAD	

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If you have multiple accounts, make sure to select the correct individual or company for the document you're uploading.

Select Documents to upload your documents.



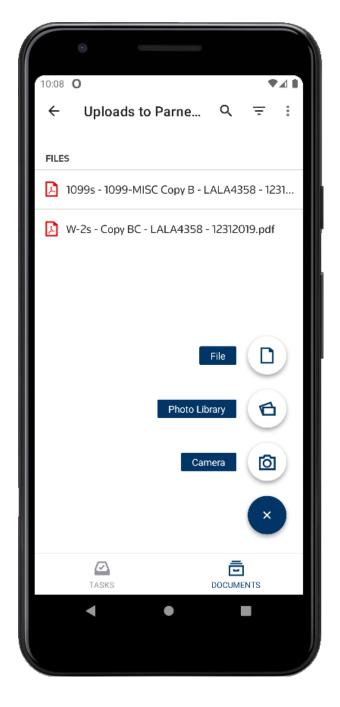
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You can submit a document if its already saved on your device. Or you can take a picture of the document.

When you use the **Camera** option, the Onvio Client Center app will convert the picture into a PDF for you.

Please note we need all documents in PDF format only. NO JPEGS OR IMAGE FILES OF ANY TYPE



We recommend you use the Automatic option when taking a picture of your document to make sure your document is in focus and readable.

Tip: Take pictures using as much light as possible

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

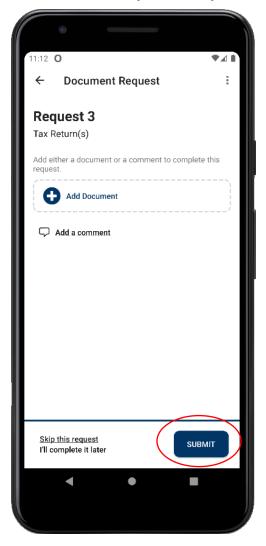
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