

# CUSTOMER GUIDE TO THE NEW ONVIO CLIENT CENTRE

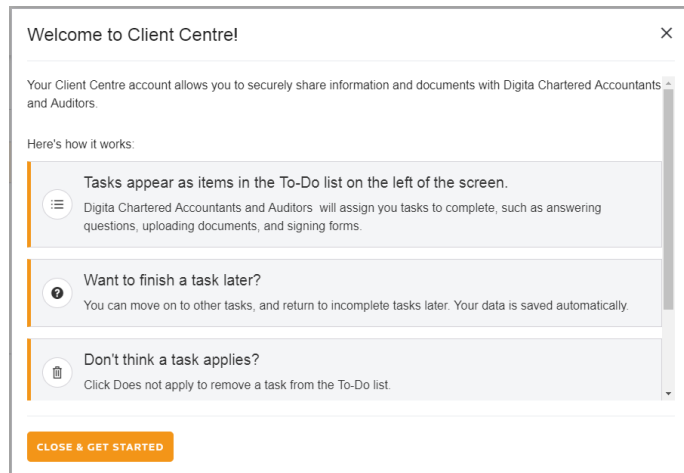
## Contents

OVERVIEW.....	1
HOME SCREEN.....	2
E-SIGNING .....	3
VIEW SIGNED DOCUMENTS .....	7
DOCUMENTS.....	8
HELP SECTION .....	9

## OVERVIEW

Onvio Client Centre allows you to share documents with your Accountant and electronically (E-Sign) documents sent to you.

The first time you log into the new Client Centre you will be shown a brief overview of what is included in this new version.

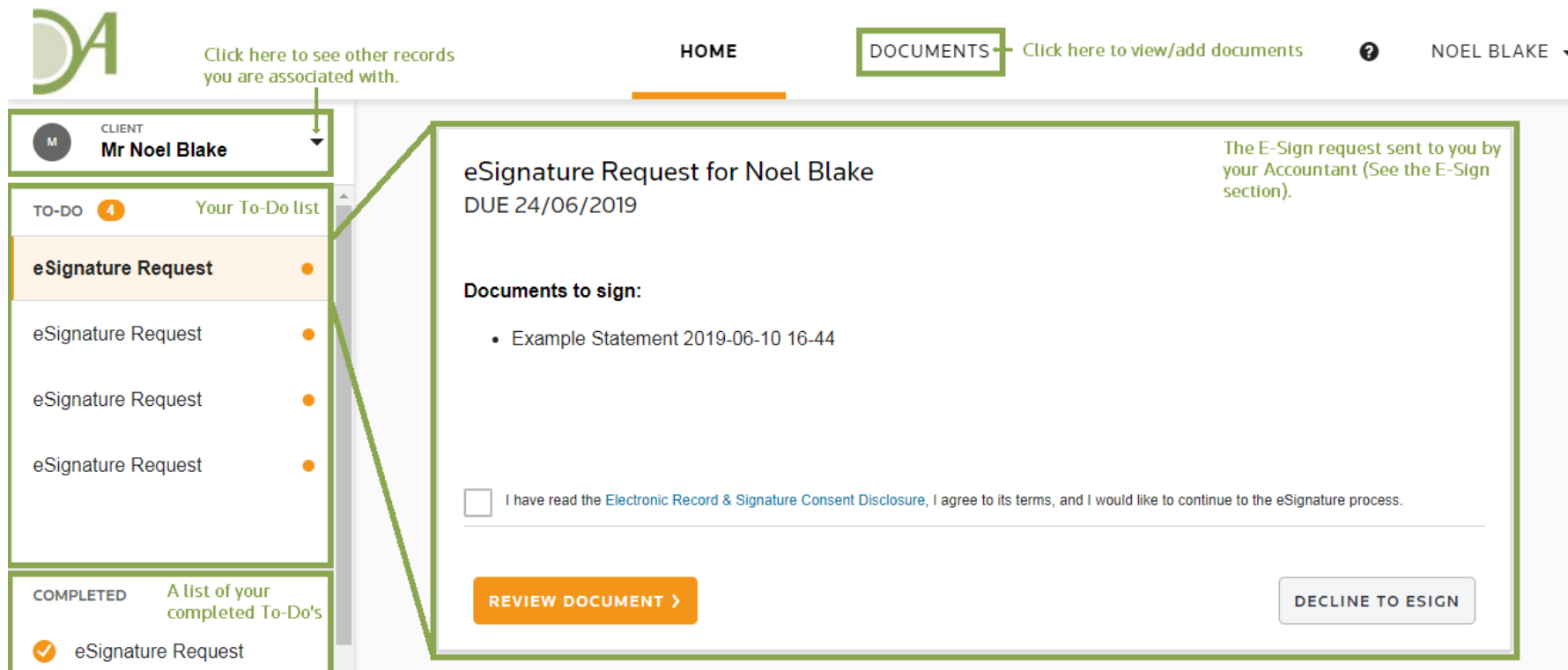


## HOME SCREEN

On the left you will see that there is a list of the E-Sign requests (If they have been sent) that your accountant has sent to you and also a list of your completed E-Sign requests.

The main part of the screen will show the active E-Sign request (for instruction see the E-Sign section to see this process).

The default client that appears when an individual log's in is based on alphabetical order. e.g. Noel is a director of companies' Stoke Ltd and XYZ Ltd. When Noel logs in, the default client will always be Mr Noel Blake, if he clicks the dropdown menu he can choose Stoke Ltd and XYZ Ltd.



The screenshot displays the user interface for an eSignature request. At the top right, the user is identified as **NOEL BLAKE**. The main navigation bar includes **HOME** and **DOCUMENTS** (highlighted with a green box). A tooltip above the **DOCUMENTS** button says "Click here to view/add documents".

On the left side, there is a sidebar menu. The top section is labeled **CLIENT** and shows **Mr Noel Blake**. A tooltip above this section says "Click here to see other records you are associated with." Below this is a **TO-DO** section with a count of **4** and the text "Your To-Do list". The first item in the list is **eSignature Request**, which is highlighted in orange. Below it are three more **eSignature Request** items. At the bottom of the sidebar is a **COMPLETED** section with the text "A list of your completed To-Do's" and one **eSignature Request** item with a checkmark icon.

The main content area displays an **eSignature Request for Noel Blake** with a **DUE 24/06/2019** date. A note on the right states: "The E-Sign request sent to you by your Accountant (See the E-Sign section)." Under the heading **Documents to sign:**, there is a list item: "Example Statement 2019-06-10 16-44". At the bottom of the main area, there is a checkbox with the text: "I have read the [Electronic Record & Signature Consent Disclosure](#), I agree to its terms, and I would like to continue to the eSignature process." Below this are two buttons: **REVIEW DOCUMENT >** and **DECLINE TO ESIGN**.

## 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.

Confirm you have read the **Electronic Record and Signature Consent Disclosure** by ticking the box and **Review Documents**, or **Decline to E-Sign**



**eSignature Request for Noel Blake**  
DUE 24/06/2019

**Documents to sign:**


- Example Statement 2019-06-10 16-44

I have read the [Electronic Record & Signature Consent Disclosure](#), I agree to its terms, and I would like to continue to the eSignature process.

**REVIEW DOCUMENT >** **DECLINE TO ESIGN**

### Step 2.

Confirm Signature, here you can either type, draw or upload an image of your signature which will appear on the signed document.



**Confirm Signature**

Full Name

**SELECT STYLE** **DRAW** **UPLOAD**

Signature Style

**NEXT >**

### Step 3.

On this screen review and E-Sign the document

**To Sign**

- 1 Example Invoice Table 2019-...
- 1 Example Outstanding Balan...

This E-Sign request has 2 documents that require signature

1 **Attention Needed**

There are 1 items that need your attention on this document.

Click here to move to the first required action

START

Client Name:

Document:

The information within this document is correct and complete to the best of my knowledge and belief.

Signature:

Name:

Date:

You can scroll through the pages in the document either by using the mouse or clicking the arrows

^ Page 1 / 2 v | Q 50% Q

REVIEW ACTION-REQUIRED ITEMS 2

This shows how many other Items require signature

DECLINE TO ESIGN

Step 4.

Confirm your signature(s)

Client Name:

Document:

1 of 1


Confirm your signature.

ent is correct and complete to the best of my

**CONFIRM**



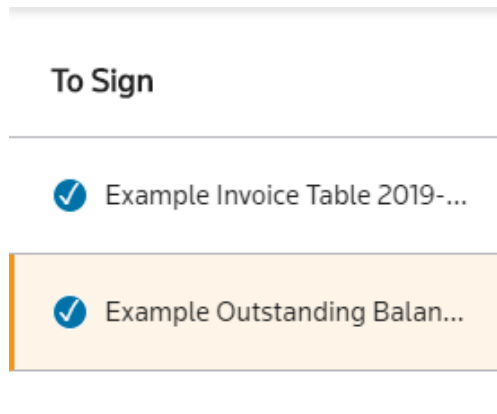
If you have multiple documents to sign you will see the following, press **Continue**.

 Continue to the next document that requires attention?

**CONTINUE** CANCEL

### Step 5.

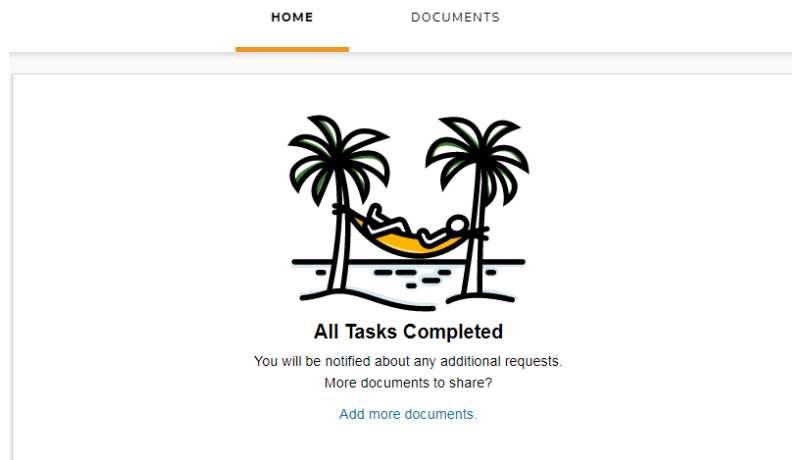
Once you have actioned all requests they will be marked with a tick, you now see **Sign & Submit** is now active press this to submit to your accountant.



**SIGN & SUBMIT**

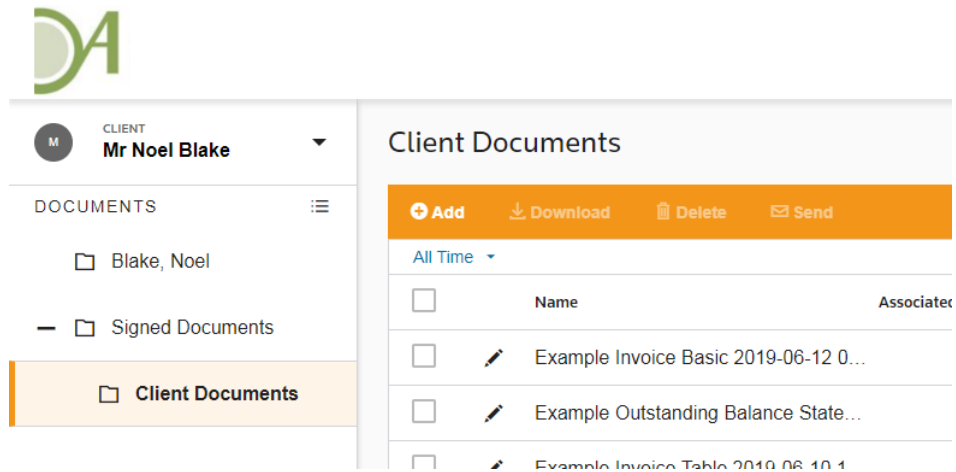
You have now successfully signed the E-Sign request, your accountant should receive notification for each request you have actioned.

Once you have gone through all your E-Sign request and you have no To-Do's you will see the following screen indicating no request are outstanding.



## VIEW SIGNED DOCUMENTS

To review any documents, you have electronically signed you will need to go to the documents page where you can view the Signed Documents | Client Documents folder.

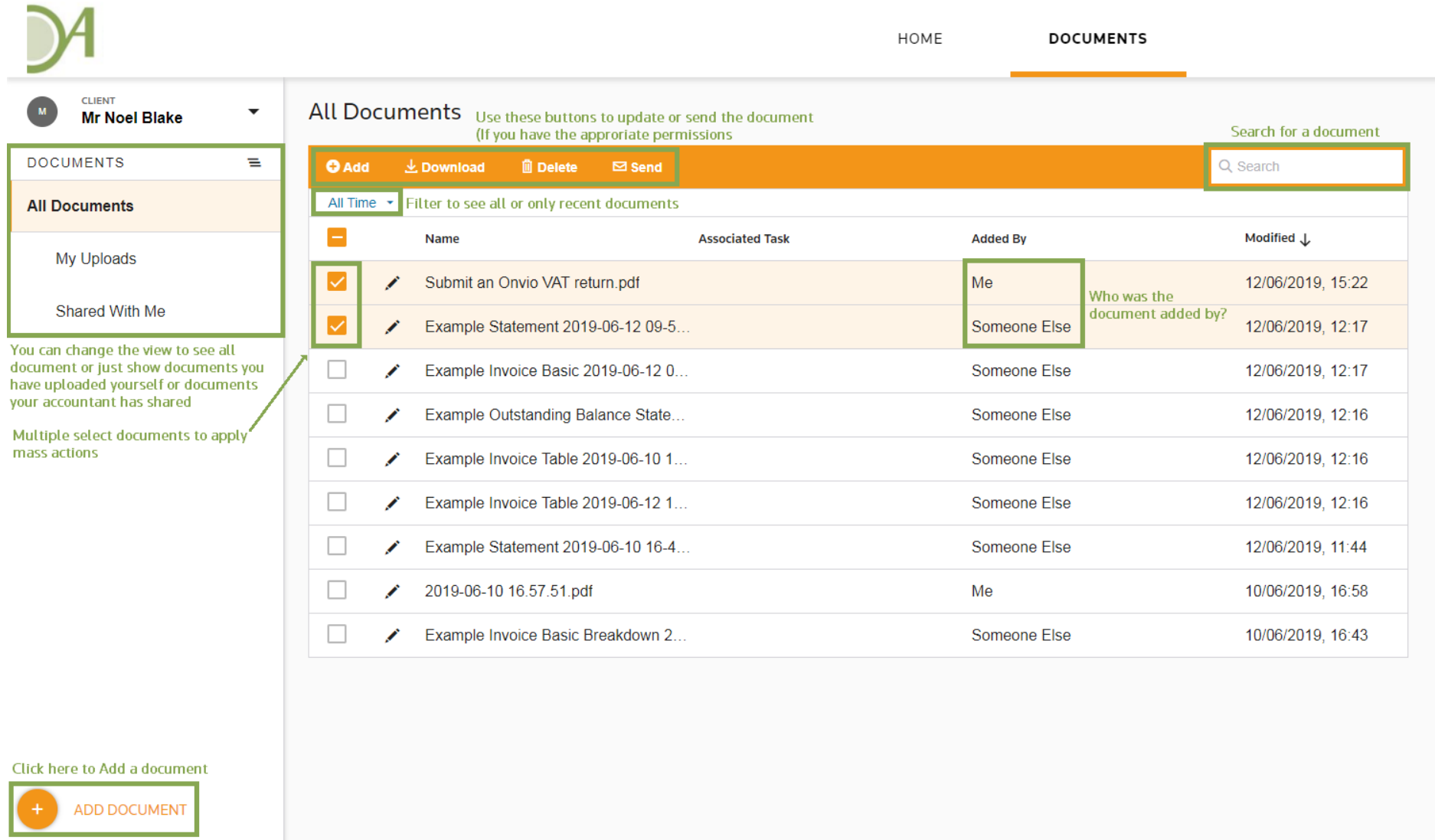


The screenshot shows the Thomson Reuters interface for viewing signed documents. On the left, there is a navigation pane with a logo at the top and a client profile for 'Mr Noel Blake'. Below the profile, there is a 'DOCUMENTS' section with a list of folders: 'Blake, Noel', 'Signed Documents', and 'Client Documents' (which is highlighted). The main area on the right is titled 'Client Documents' and features an orange action bar with 'Add', 'Download', 'Delete', and 'Send' options. Below this is a filter dropdown set to 'All Time'. A table lists documents with columns for checkboxes, 'Name', and 'Associated'.

<input type="checkbox"/>	Name	Associated
<input type="checkbox"/>	Example Invoice Basic 2019-06-12 0...	
<input type="checkbox"/>	Example Outstanding Balance State...	
<input type="checkbox"/>	Example Invoice Table 2019-06-10-1	

## DOCUMENTS

To access the **documents** section, click the tab on the Home screen, by default this view will show all the documents your accountant has shared with you.



**DA** HOME **DOCUMENTS**

CLIENT **Mr Noel Blake**

**DOCUMENTS**

- All Documents
- My Uploads
- Shared With Me

You can change the view to see all document or just show documents you have uploaded yourself or documents your accountant has shared

Multiple select documents to apply mass actions

Click here to Add a document

**ADD DOCUMENT**

**All Documents** Use these buttons to update or send the document (If you have the appropriate permissions)

Search for a document

**+** Add **↓** Download **🗑** Delete **✉** Send

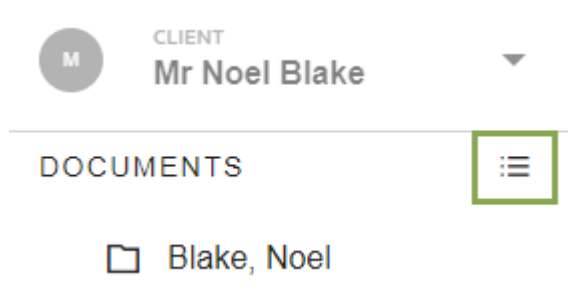
**All Time** Filter to see all or only recent documents

<input type="checkbox"/>	Name	Associated Task	Added By	Modified ↓
<input checked="" type="checkbox"/>	Submit an Onvio VAT return.pdf		Me	12/06/2019, 15:22
<input checked="" type="checkbox"/>	Example Statement 2019-06-12 09-5...		Someone Else	12/06/2019, 12:17
<input type="checkbox"/>	Example Invoice Basic 2019-06-12 0...		Someone Else	12/06/2019, 12:17
<input type="checkbox"/>	Example Outstanding Balance State...		Someone Else	12/06/2019, 12:16
<input type="checkbox"/>	Example Invoice Table 2019-06-10 1...		Someone Else	12/06/2019, 12:16
<input type="checkbox"/>	Example Invoice Table 2019-06-12 1...		Someone Else	12/06/2019, 12:16
<input type="checkbox"/>	Example Statement 2019-06-10 16-4...		Someone Else	12/06/2019, 11:44
<input type="checkbox"/>	2019-06-10 16.57.51.pdf		Me	10/06/2019, 16:58
<input type="checkbox"/>	Example Invoice Basic Breakdown 2...		Someone Else	10/06/2019, 16:43

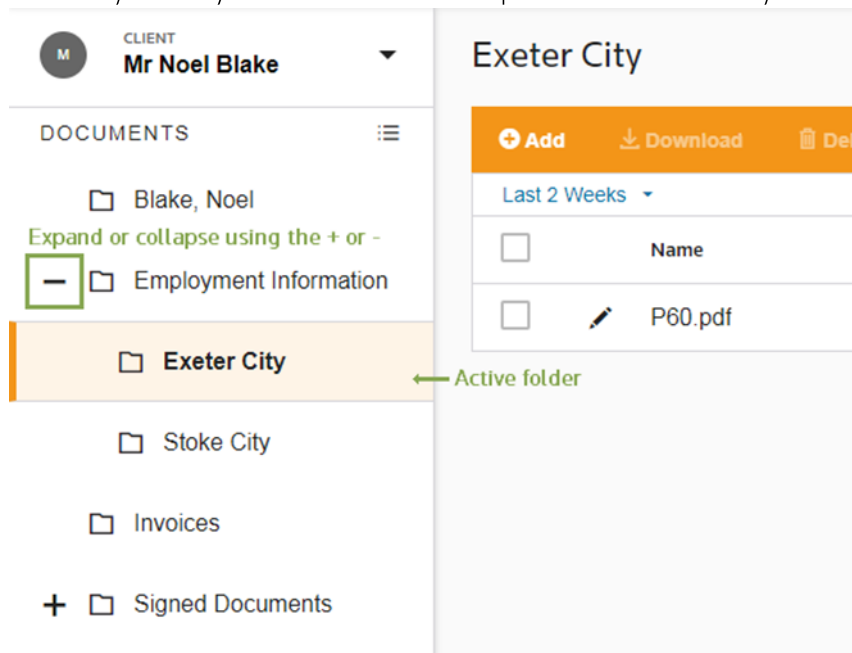
Who was the document added by?



If you wish to see the Folder structure your accountant has setup click on this button.



When you view by Folder you will see Windows explorer tree view. Here you can expand folders and view the content and apply actions as above.



## HELP SECTION

You can view the view the **Onvio Client Centre** Help by clicking the ? icon in the top right hand side of the screen next to your name.