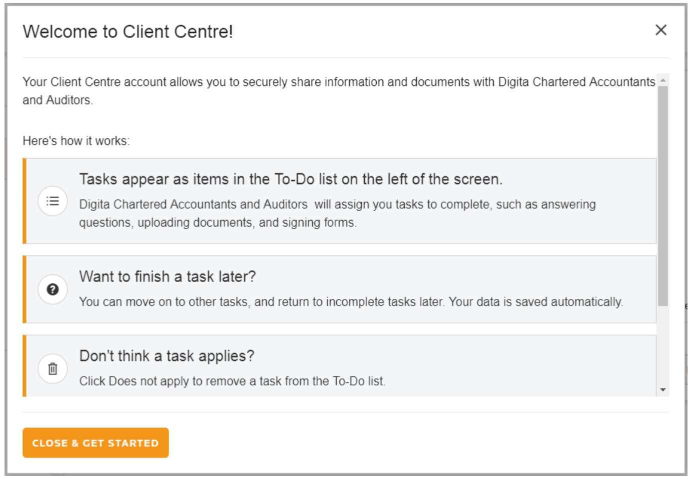
CUSTOMER GUIDE TO THE NEW ONVIO CLIENT CENTRE

Contents

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.

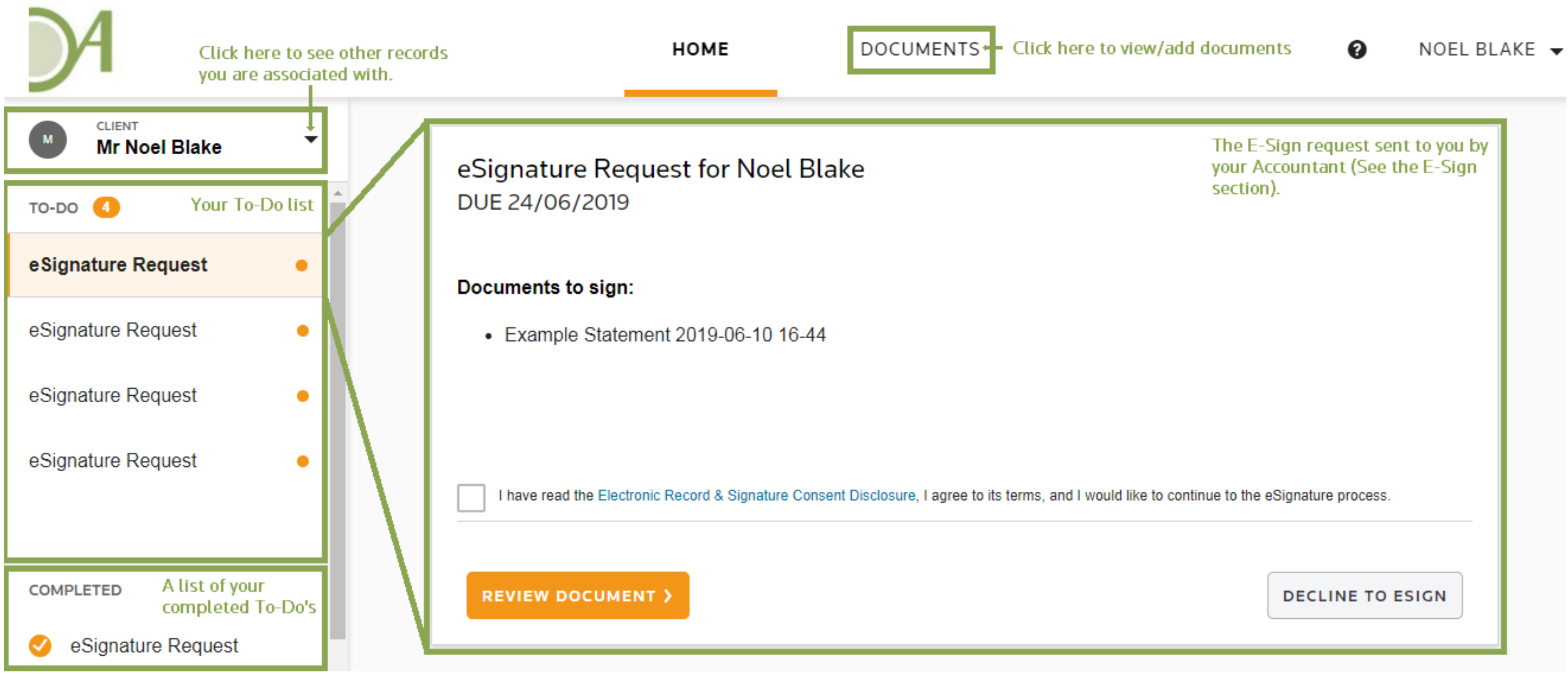


HOME SCREEN

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.



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.

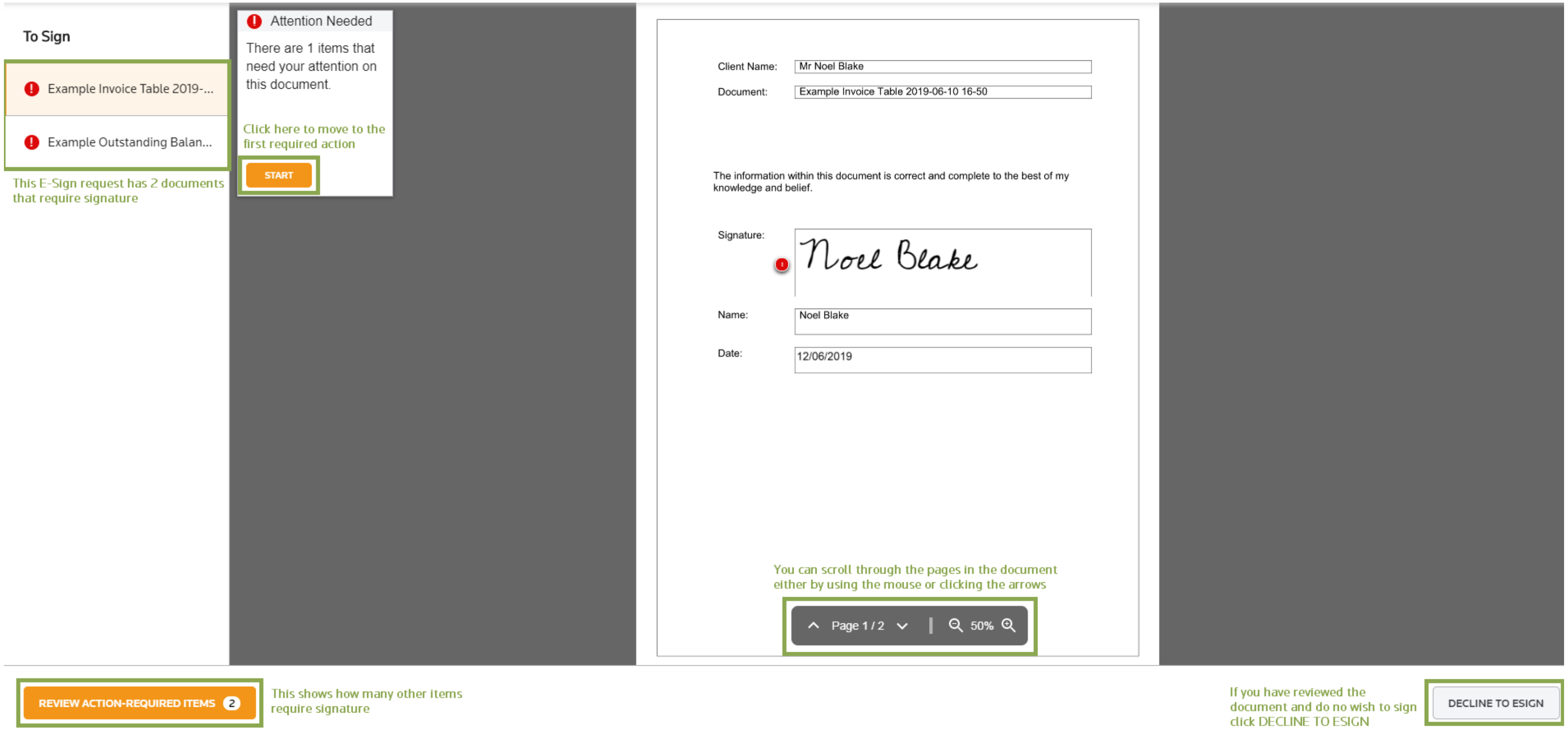
Confirm you have read the Electronic Record and Signature Consent Disclosure by ticking the box and Review Documents, or Decline to E-Sign

Step 2.

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

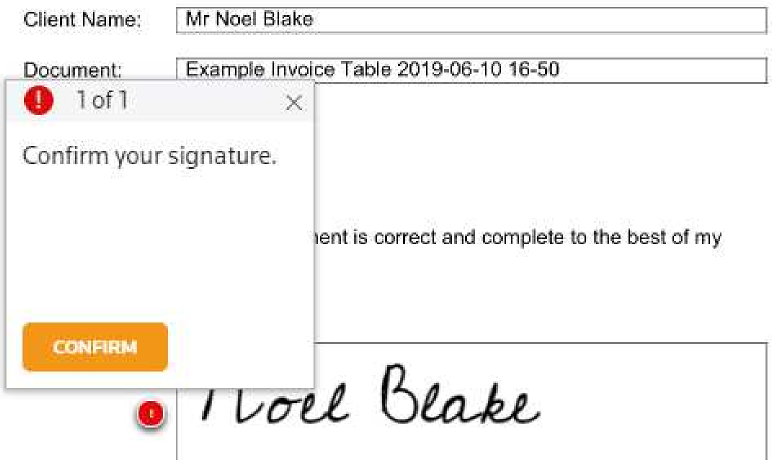
Step 3.

On this screen review and E-Sign the document

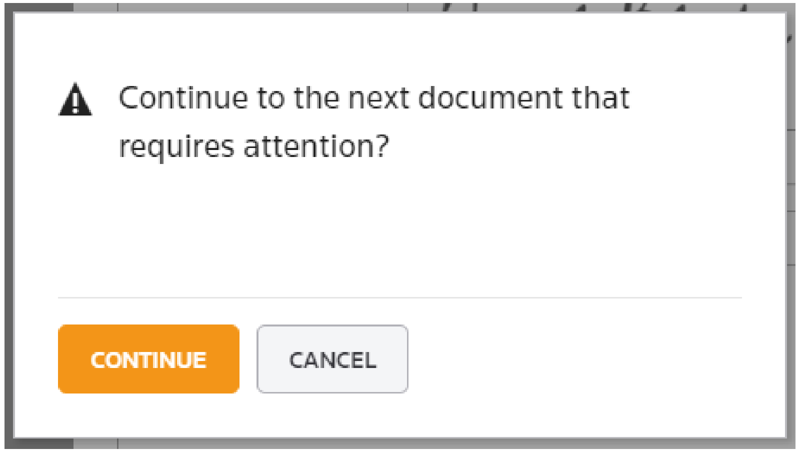


Step 4.

Confirm your signature(s)

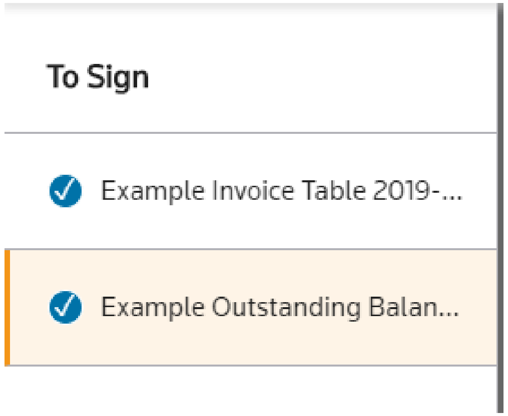


If you have multiple documents to sign you will see the following, press Continue.



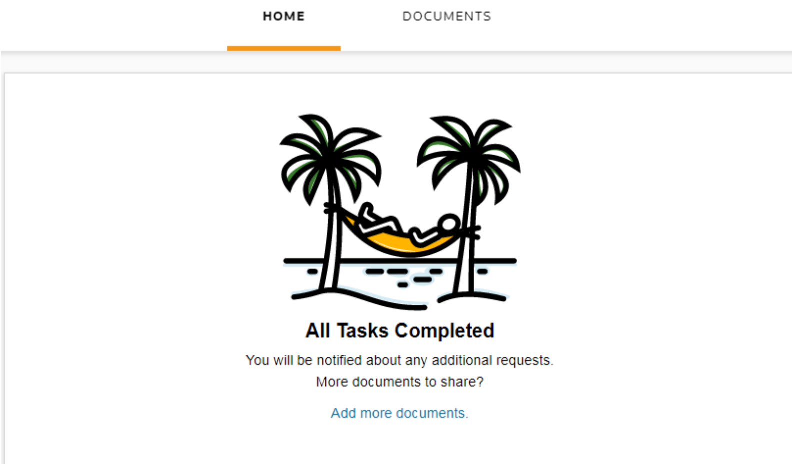
Step 5.

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.



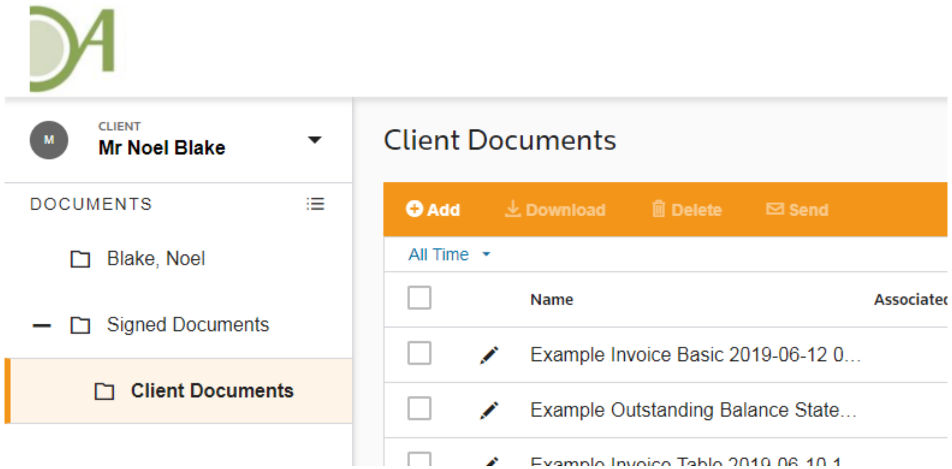
You have now successfully signed the E-Sign request, your accountant should receive notification for each request you have actioned.

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.



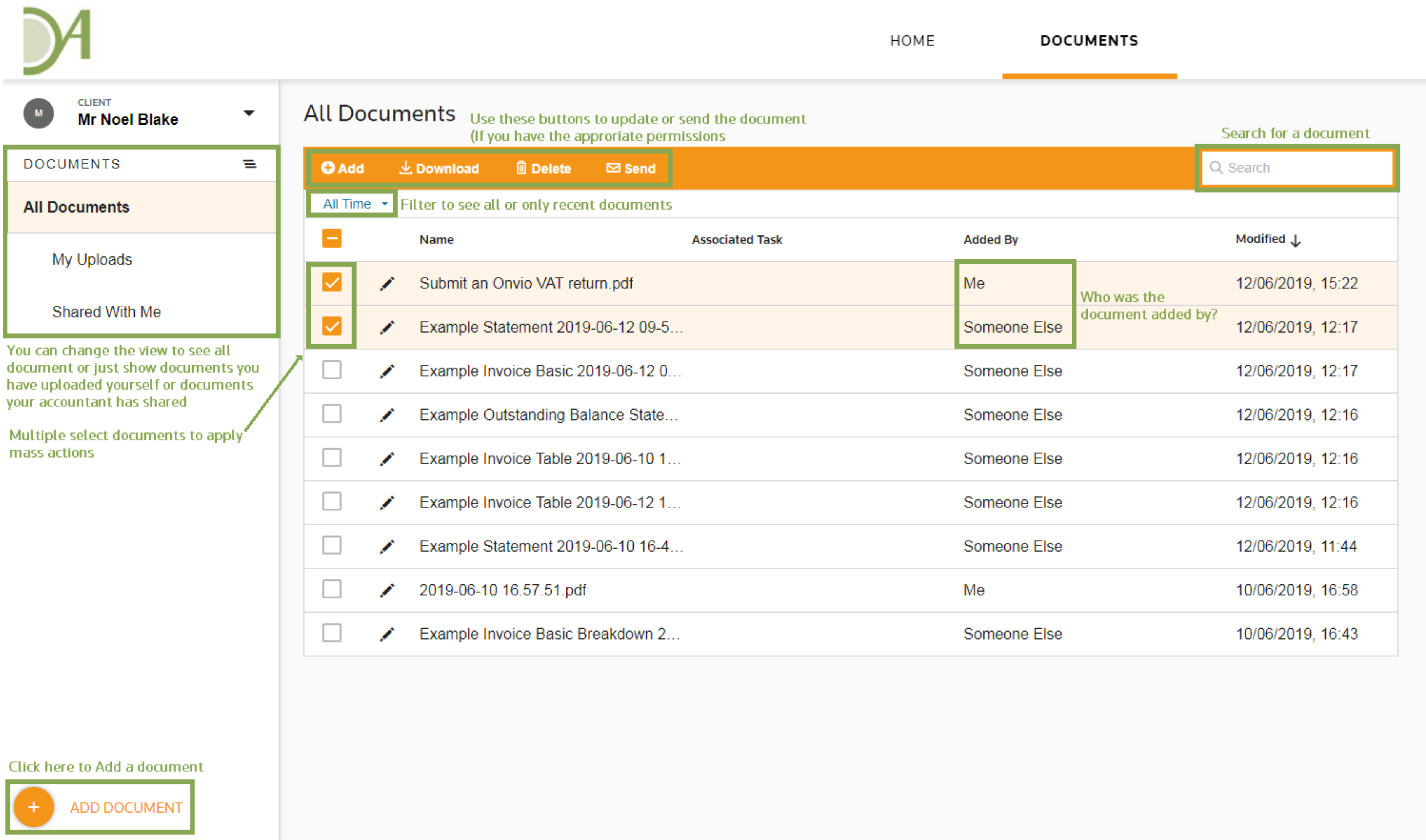
VIEW SIGNED DOCUMENTS

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.

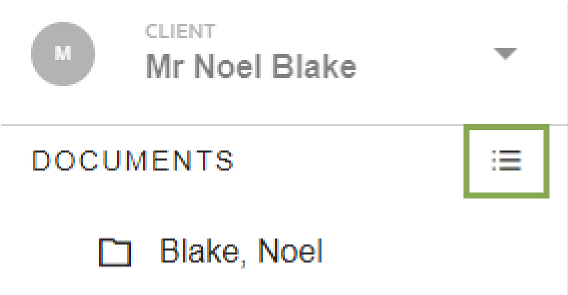


DOCUMENTS

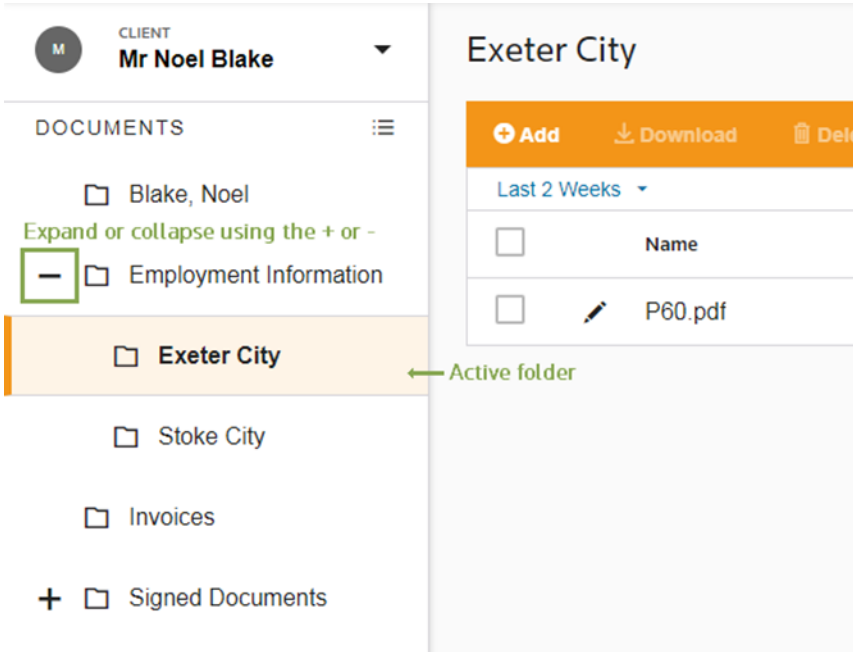
To access the **documents** section, click the tab on the Home screen, by default this view will show all the documents your accountant has shared with you.



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.