



Guide to using Onvio

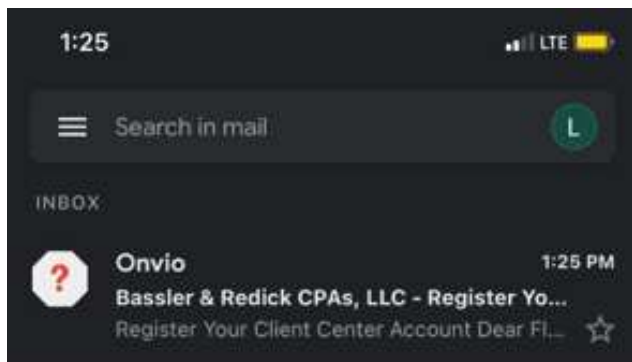
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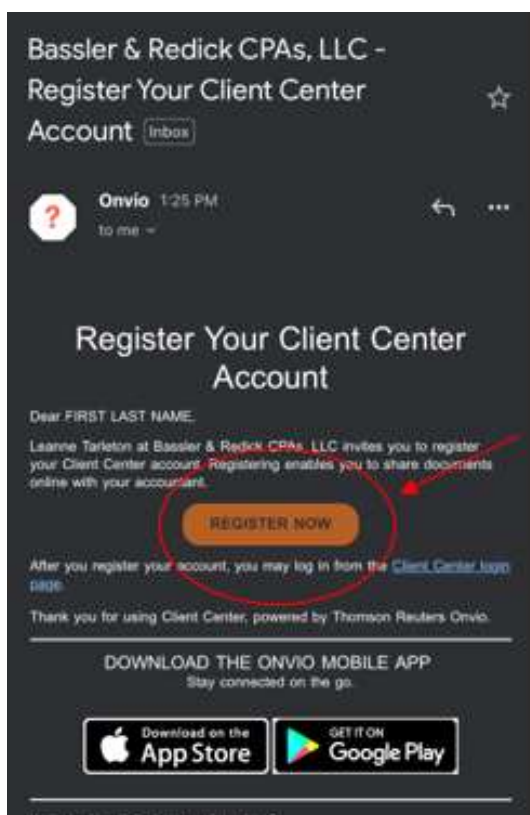
Getting Started

Prior to using Onvio for the first time, you will need to register your Onvio account.

One of the staff members at Bassler and Redick CPAs will send a registration link to your email address.



Open the email and click REGISTER NOW.



The REGISTER NOW button will take you to a web page where you will create a password. Once you have entered a password, select REGISTER ME.

1:26 LTE

Done onvio.us AA

Register Your Account

Account Information

First Name *

Last Name *

Create Password

New Password * [Show typing](#)

Confirm Password *

* Required Field

Password Requirements

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"

REGISTER ME

Now your account is registered. You can log on to your Onvio account anytime by following the link: <https://onvio.us/#/>

Log in using your email address and the password you created.

Multi-Factor Authentication

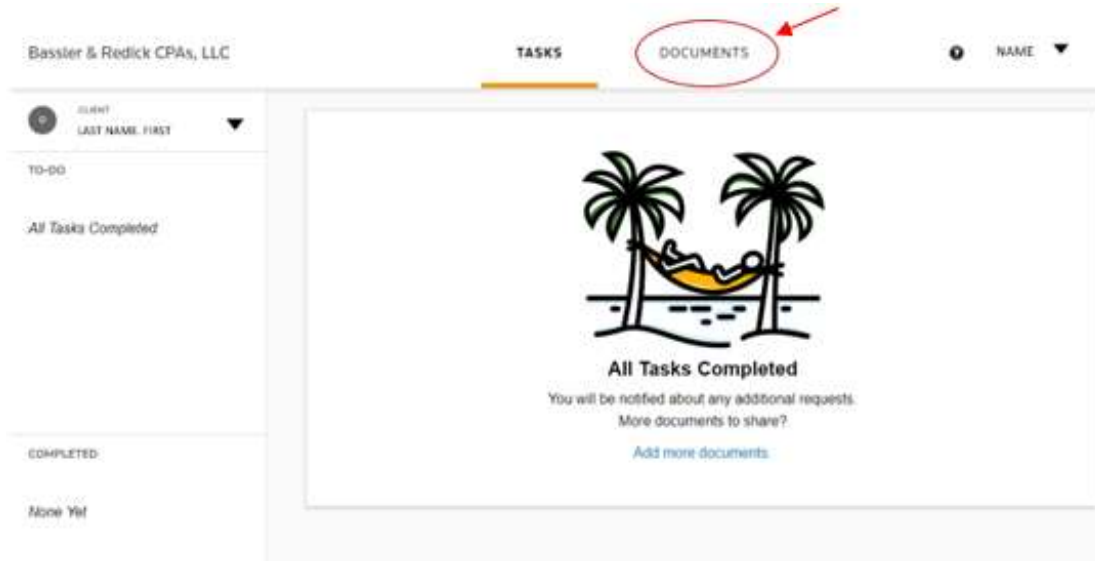
Onvio gives clients the option to set up multi-factor authentication to increase the security of their Onvio account. Multi-factor authentication is not required.

If you do set up multi-factor authentication, and are unable to access your authenticating device, call the office and our staff can generate a 24-hour, temporary code.

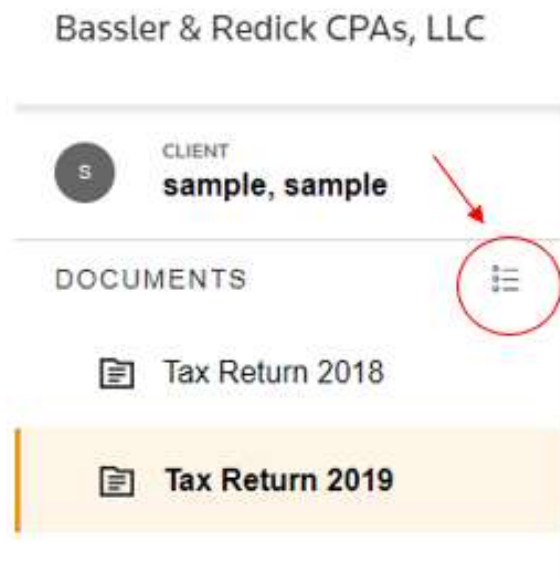
Accessing Documents on Onvio

Log on to Onvio using your registered email address and password. Close out of any pop-up messages.

Onvio will automatically take you to the TASKS section of the Onvio Client Center. Select DOCUMENTS from the top center of the page to view your client documents.



In DOCUMENTS, you can change your view by clicking the icon next to DOCUMENTS under the client name. This will change the view between Firm Folder View and Simple List View.



In Firm Folder View, you can view documents by folder (ex Tax Return 2018, Tax Return 2019, ect). In the example below, the sample client has selected the Firm Folder View. They have selected the folder Tax Return 2019, so only the documents in the Tax Return 2019 folder appear.

	Name	Associated Task	Added By	Modified ↓
<input type="checkbox"/>	ToDoSample_2019.pdf		Someone Else	10/29/2020, 1:52 PM
<input type="checkbox"/>	Sample_2019_TaxReturn.pdf		Someone Else	10/29/2020, 1:52 PM

In the Simple List View, you can view all the documents that have been uploaded to your Client Center. In the example below, the sample client has selected the Simple List View. They are able to see all the documents that have been uploaded to their Client Center.

	Name	Associated Task	Added By	Modified ↓
<input type="checkbox"/>	ToDoSample_2019.pdf		Someone Else	10/29/2020, 1:52 PM
<input type="checkbox"/>	Sample_2019_TaxReturn.pdf		Someone Else	10/29/2020, 1:52 PM
<input type="checkbox"/>	Sample_2018_TaxReturn.pdf		Someone Else	10/29/2020, 1:52 PM
<input type="checkbox"/>	ToDoSample_2018.pdf		Someone Else	10/29/2020, 1:52 PM

Click on a document to view a preview. Download the document to save it on your personal device and print. When you are done previewing the document, select CLOSE.

The document preview tool bar is shown below.

ToDoSample_2019.pdf

Name of the document you are previewing.

Download button - downloads the document to your personal device.

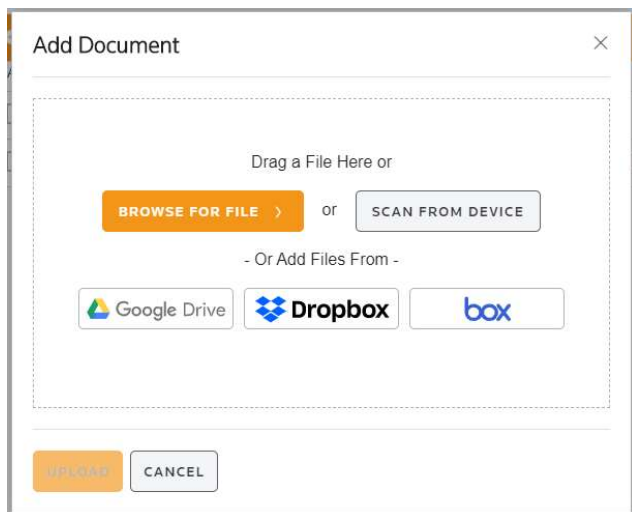
Click to close the preview.

Uploading Documents

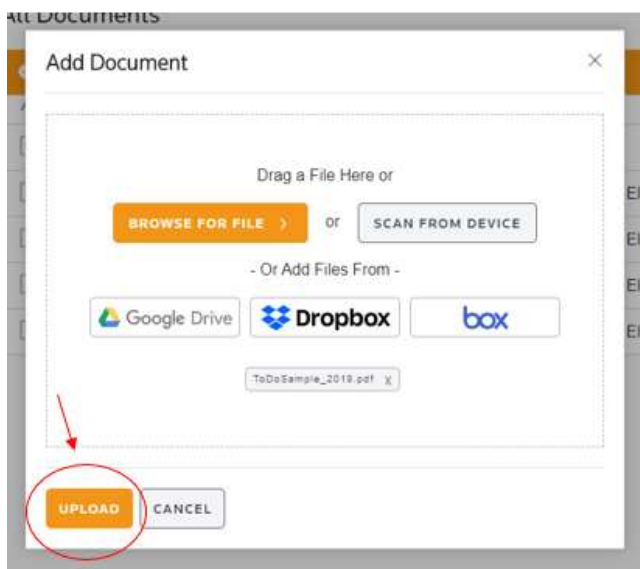
Begin by navigating to the Simple List View under DOCUMENTS. On the orange bar, select Add.



Once you click Add, a box will pop up. You may choose one of the browsing options to upload a file or drag and drop your file to the box.



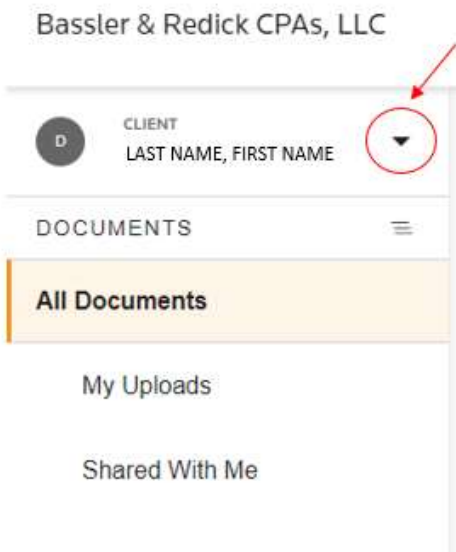
Once the desired documents are selected, click UPLOAD.



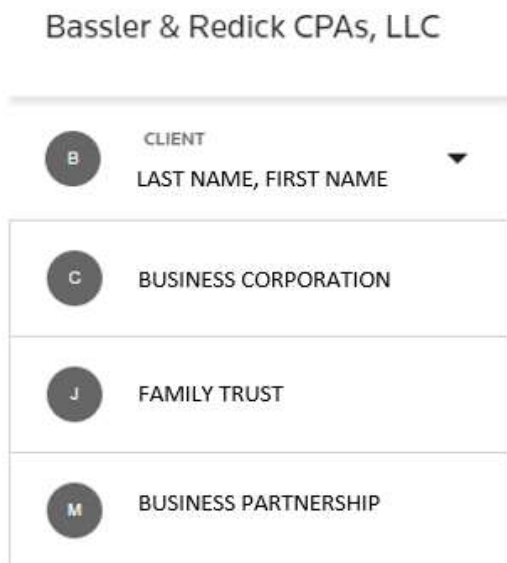
Switching Between Clients

Some clients will have access to multiple Client Centers. Individuals may have access to their personal Client Center as well as Client Centers for family members, businesses, trusts, and estates.

To view another Client Center, click on the downward facing triangle next to the client name.



When you select the triangle, a dropdown menu will appear with a list of all the Client Centers you have access to. Select the client name you are interested in viewing.



Common Questions

- **Why am I only able to see documents for my business and not my personal account?**
 - Make sure you see the desired name on the left side of the screen. In this case, you would want to see your name rather than the business name. Click the downward facing triangle next to the client name.
 - A drop down menu will appear, and you can select your name. Once you select your name, you will be able to see the documents for your personal account rather than your business account.

- **How do I print a document?**
 - Select the document you wish to print.
 - Onvio will open a preview of the document. Download the document to your device.
 - Print the PDF file from your downloaded documents.

- **What happens if I forget my password?**
 - On the Onvio login page, there is an option to reset the password. Enter your email address and click Reset Password.
 - An email will be sent from Onvio. Follow the instructions in the email to reset your password.

- **What happens if my Onvio registration link expires?**
 - Onvio registration links expire after 24 hours. If your link has expired, contact Bassler & Redick CPAs, and one of our staff members will send you a new registration link.

If you have additional questions, please call Bassler and Redick CPAs. The office number is 907-272-2041. Our staff is always happy to help!