

JW

Julie K Wiedner CPA, PC



THOMSON REUTERS™

ONVIO™

Client Center

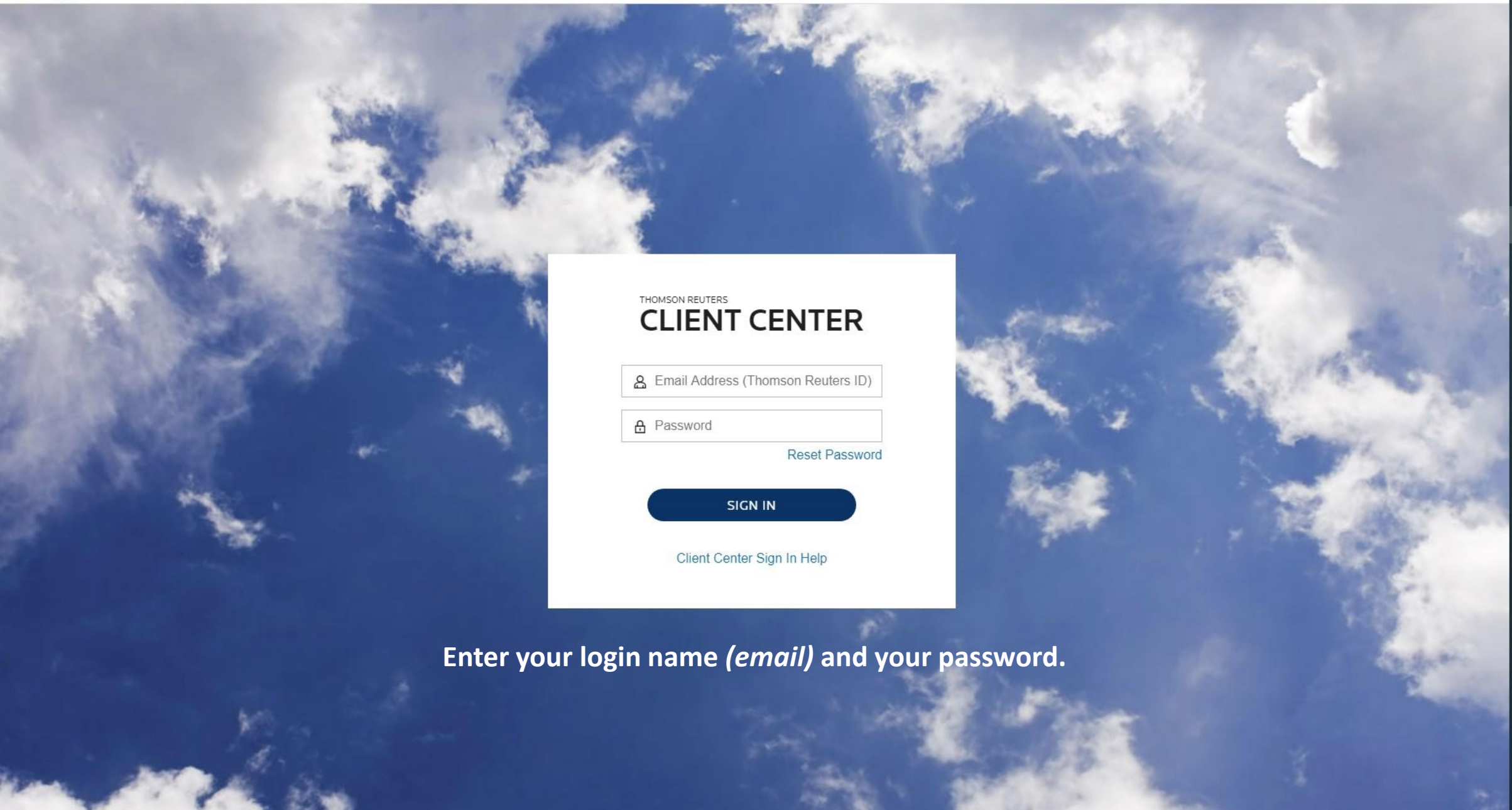
SIGN IN

Click on the Sign-in Button

Client Portal is also available as an app for your mobile phone or tablet device.



Onvio App



THOMSON REUTERS

CLIENT CENTER

[Reset Password](#)

SIGN IN

[Client Center Sign In Help](#)

Enter your login name (*email*) and your password.

CLIENT
JKWCPA TEST

TO-DO

All Tasks Completed

COMPLETED

None Yet



All Tasks Completed

You will be notified about any additional requests.

More documents to share?

[Add more documents.](#)

When you log in, you will need to go to the **DOCUMENTS** tab (*not TASKS tab*).

CLIENT
JKWCPA TEST

All Documents

DOCUMENTS

All Documents

My Uploads

Shared With Me

[Add](#) [Download](#) [Delete](#) [Send](#)

Search

All Time


<input type="checkbox"/>	Name	Associated Task	Added By	Modified ↓
<input type="checkbox"/>	2019 Terms and Conditions Addendu...		Someone Else	3/6/2020, 8:04 AM
<input type="checkbox"/>	2019 Tax Season Required signed d...		Someone Else	3/6/2020, 8:04 AM

On the documents tab, you will see a client name in the left window pane where you can switch between the personal and the business.

[+](#) ADD DOCUMENT

Shared With Me

➕ Add
↓ Download
🗑 Delete
✉ Send
🔍 Search

All Time ▾				
<input type="checkbox"/>	Name	Associated Task	Added By	Modified ↓
<input type="checkbox"/>	 2019 Terms and Conditions Addendu...		Someone Else	3/6/2020, 8:04 AM
<input type="checkbox"/>	 2019 Tax Season Required signed d...		Someone Else	3/6/2020, 8:04 AM

Under the Client Name window pane is a Document box with 3 lines/ellipses. You will click on the 3 lines/ellipses to switch between the Document list view and the Folder View.

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CLIENT

JKWCPA TEST

DOCUMENTS



2019 Taxes

Action Documents

Requested Documents

Tax Returns

Action Documents

<div> <div>+</div> Add <div>↓</div> Download <div>🗑</div> Delete <div>✉</div> Send </div> <div> <div>🔍</div> Search </div>				
All Time ▾				
<input type="checkbox"/>	Name	Associated Task	Added By	Modified ↓
<input type="checkbox"/>	 2019 Terms and Conditions Addendu...		Someone Else	3/6/2020, 8:04 AM
<input type="checkbox"/>	 2019 Tax Season Required signed d...		Someone Else	3/6/2020, 8:04 AM

In the folder view, you will see a 2019 Taxes folder that contains the Action Documents folder. This folder has your tax package with all documents that you need to sign and return.

CLIENT
JKWCPA TEST ▾

DOCUMENTS ▮

2019 Taxes

Action Documents

Requested Documents

Tax Returns

Action Documents

+ Add Download Delete Send					Search
All Time ▾					
	Name	Associated Task	Added By	Modified ▾	
<input type="checkbox"/>	2019 Terms and Conditions Addendu...		Someone Else	3/6/2020, 8:04 AM	
<input checked="" type="checkbox"/>	2019 Tax Season Required signed d...		Someone Else	3/6/2020, 8:04 AM	

To download, click on the check box next to the file “Name”. Afterwards click on the “**Download**” button. The document will download to your default downloads folder.

J

CLIENT
JKWCPA TEST

DOCUMENTS

2019 Taxes

Action Documents

Requested Documents

Tax Returns



Requested Documents

+ Add

Download

Delete

Send

Search

All time

<input type="checkbox"/>	Name	Associated Task	Added By	Modified ↓
No documents to display.				

Please note that you must be on a specific folder to upload to that folder (i.e. Requested Documents).
Click on the “+Add” button under “Requested Documents” title.

CLIENT
JKWCPA TEST

DOCUMENTS

2019 Taxes

Action Documents

Requested Documents

Tax Returns

Requested Documents

+

Add

Download

Delete

Send

Search

All time

<input type="checkbox"/>	Name	Associated Task	Added By	Modified
No documents to display.				

Add Document

Drag a File Here or

BROWSE FOR FILE

- Or Add Files From -

Google Drive

Dropbox

box

UPLOAD

CANCEL

Click on the “**BROWSE FOR FILE**” button to pick the document from your computer or mobile device’s folder directory. Choosing **Google Drive**, **Dropbox**, or **box** requires logging into your cloud-based storage account, separate from your Onvio client portal account.

Requested Document

[+ Add](#) [Download](#)

All Time

☐ Name

No documents to display.

Organize New folder

Search Downloads

Name	Date modified	Type	Size
Quick access			
Today (1)			
2019 Tax Season Required signed documents	3/6/2020 10:34 AM	Adobe Acrobat D...	274 KB
Earlier this year (4)			
gp-premium-1.9.1	1/31/2020 4:32 PM	Compressed (zipp...	809 KB
drive-download-20200131T133442Z-001	1/31/2020 7:34 AM	Compressed (zipp...	456 KB
IABS	1/17/2020 8:04 AM	Adobe Acrobat D...	563 KB
drive-download-20200131T133442Z-001	1/31/2020 7:35 AM	File folder	

Downloads

File name:

Custom view

Open Cancel

Browse your folder directory and find the requested pdf document. Click on the **“Open”** button once the pdf file(s) are found.

CLIENT
JKWCPA TEST

DOCUMENTS

2019 Taxes

Action Documents

Requested Documents

Tax Returns

Requested Documents

+ Add Download Delete Send

Search

All Time

	Name	Associated Task	Added By	Modified
	No documents to display.			

No documents to display.

Add Document

Drag a File Here or

BROWSE FOR FILE >

- Or Add Files From -

Google Drive

Dropbox

box

2019 Tax Season Required signed documents.pdf X

UPLOAD

CANCEL

Once the requested file is chosen, click on the “UPLOAD” button.

Requested Documents

 Tax Returns

All Time ▾

<input type="checkbox"/>	Name	Associated Task	Added By	Modified ↓
<input type="checkbox"/>	 2019 Tax Season Required signed d...		Me	3/6/2020, 2:20 PM

The uploaded file(s) will appear here. An email notification will be sent to Julie for review.