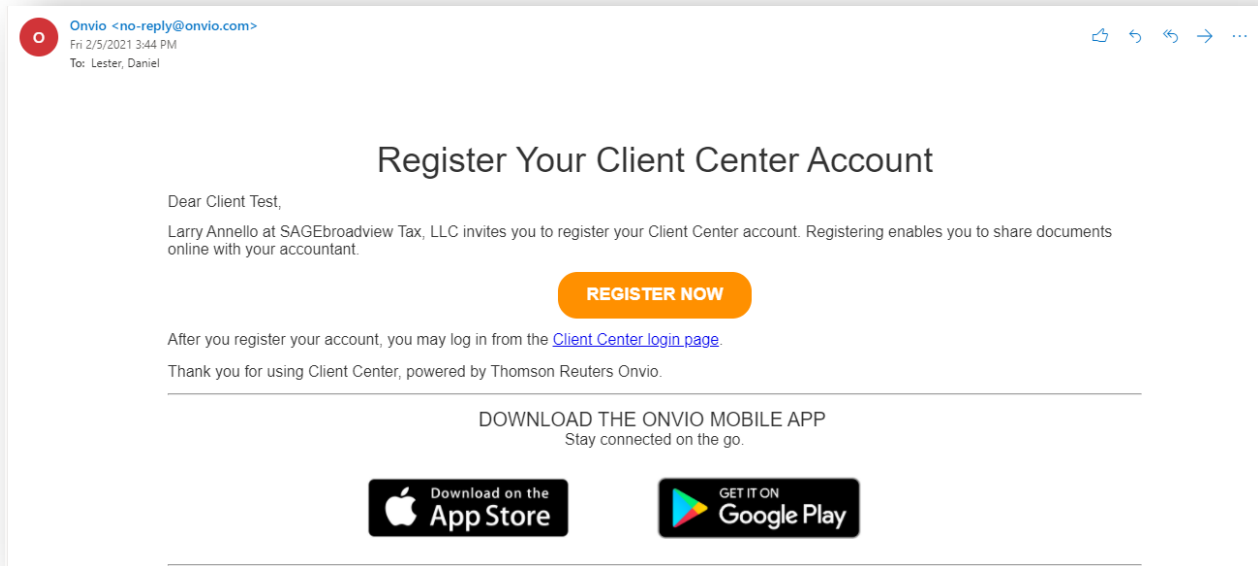


**REGISTRATION:**

Open your registration email and click "REGISTER NOW"



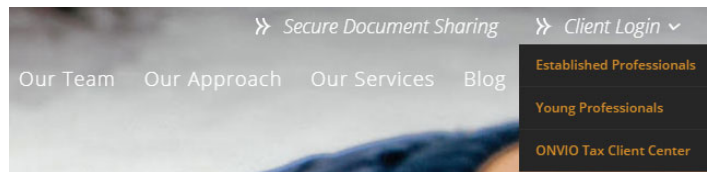
**Pro Tip:** Download the mobile app to easily scan and return authorizations (see p. 3)

Create your account. **Note:** Your email is going to be used as your username

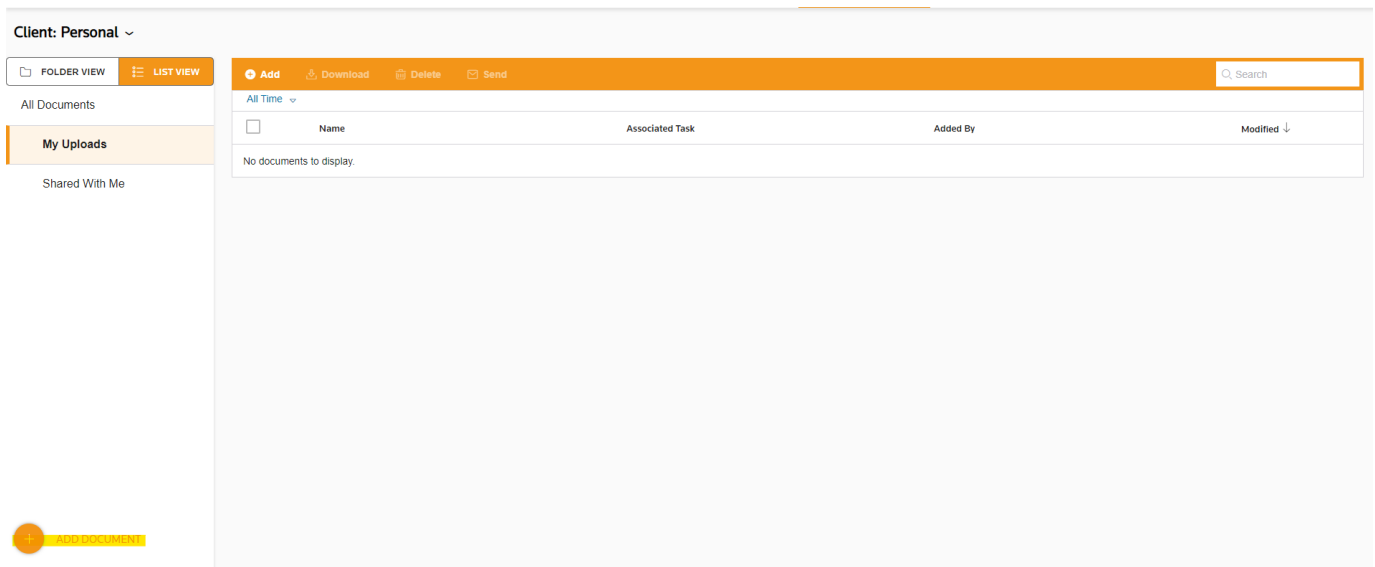
The screenshot shows the 'Register Your Account' web form. It is divided into two main sections: 'Account Information' and 'Create Password'.  
 In the 'Account Information' section, there are two input fields: 'First Name \*' (containing 'Client') and 'Last Name \*' (containing 'Test'). Below these is the 'Email (Thomson Reuters ID)' field, which contains 'lester\_dani@bentley.edu'.  
 The 'Create Password' section has a 'New Password \*' field with a red error message: 'Please provide a valid password.' and a 'Show typing' link. Below it is a 'Confirm Password \*' field. A legend indicates that an asterisk (\*) denotes a 'Required Field'.  
 To the right of the password fields is a 'Password Requirements' box. It states: 'Your password **must** have at least 8 characters and 4 of the following:' followed by a bulleted list: 'At least 1 number (0-9)', 'At least 1 lowercase letter (a-z)', 'At least 1 uppercase letter (A-Z)', and 'At least 1 special character (punctuation): ~ ! @ # \$ % ^ & \* ( ) \_ - + = { } [ ] \ | ; : ' , . ? /'. Below this, it says 'Your password should **not** use:' followed by another bulleted list: 'words from the dictionary', 'your user ID', and 'sequential letters or numbers such as "abc" or "123"'.  
 At the bottom left of the form is a dark 'REGISTER ME' button.

## **ADDING DOCUMENTS:**

Access ONVIO Client Center by [clicking here](#) or by selecting "ONVIO Tax Client Center" from the "Client Login" dropdown on [our website](#)



Log in and go to the "DOCUMENTS" tab. On the left, select "LIST VIEW" and a "+ ADD DOCUMENT" button will appear on the bottom left.



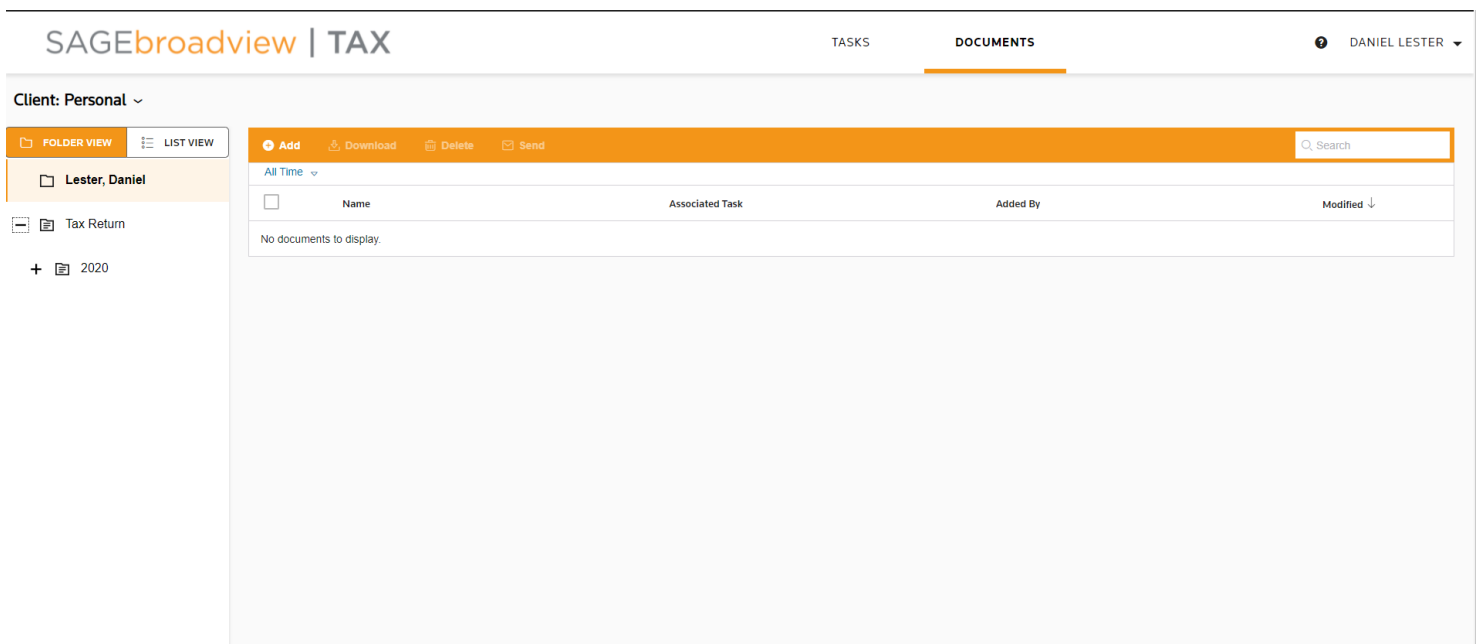
Select your files and click "UPLOAD".

Your files will appear and we will be notified that you have uploaded files.

***We may move the files to a different folder on our end which may cause them to disappear from your portal.***

**VIEWING DOCUMENTS WE SHARE WITH YOU:**

Log in and go to the "DOCUMENTS" tab, then click "FOLDER VIEW" on the left side.  
Click through to the correct tax year.



SAGE**bro**adview | TAX

TASKS DOCUMENTS DANIEL LESTER

Client: Personal

FOLDER VIEW LIST VIEW

Lester, Daniel

Tax Return

2020

Add Download Delete Send

Search

All Time

Name	Associated Task	Added By	Modified
No documents to display.			

**PDFs Labeled "ActionRequired"**

These contain documents and corresponding instructions that require "action" on your part.

**Please download, sign, and return the E-Filing Authorizations one of three ways:**

1) through the Onvio APP; 2) through the Onvio online PORTAL; or 3) by mail.

**PDFs Labeled "ArchiveTaxReturn"**

These are your copies and should be downloaded and saved for your records