

CLIENT CENTER

Getting Started with the Onvio Client Center

Register Your Account

- You will receive an email invitation from **Bookkeeping Plus**.
- Click the “**Register**” button in the email.
- Create a username and password, then confirm your email.

*Haven't received the invitation?
Call or email us – we'll resend it.*

Log In

- Go to <https://onvio.us/clientcenter> or scan the QR code below.
- Enter your username and password.
- If prompted, enter the security code sent to your email or phone (two-factor authentication).



What is the Onvio Client Center?

The Onvio Client Center is your **secure online portal** where you can:

- View your tax, payroll, and bookkeeping documents anytime.
- Upload documents safely to us (no email attachments).
- Access past returns, reports, and statements in one place.
- E-sign forms when requested.

Quick Tips:

Forgot Your Password?

- On the login page, click “**Forgot Password**.”
- Enter your email and follow the reset instructions.

Switching Between Accounts (if needed)

If you have access to more than one account (personal, business, multiple businesses):

- Click your name at the top-right of the screen.
- Choose “**Switch Account**” from the dropdown menu.

Viewing & Uploading Documents

- Click the **Documents** tab.
- **To view:** Click the file name to open it.
- **To upload:** Click **Upload**, choose your file, and submit. *You will get a confirmation once your file is uploaded.*

E-Sign Documents (if requested)

- You will receive an email notification when we send a form for signature.
- Log in to the Client Center and click **Tasks** to review and e-sign.