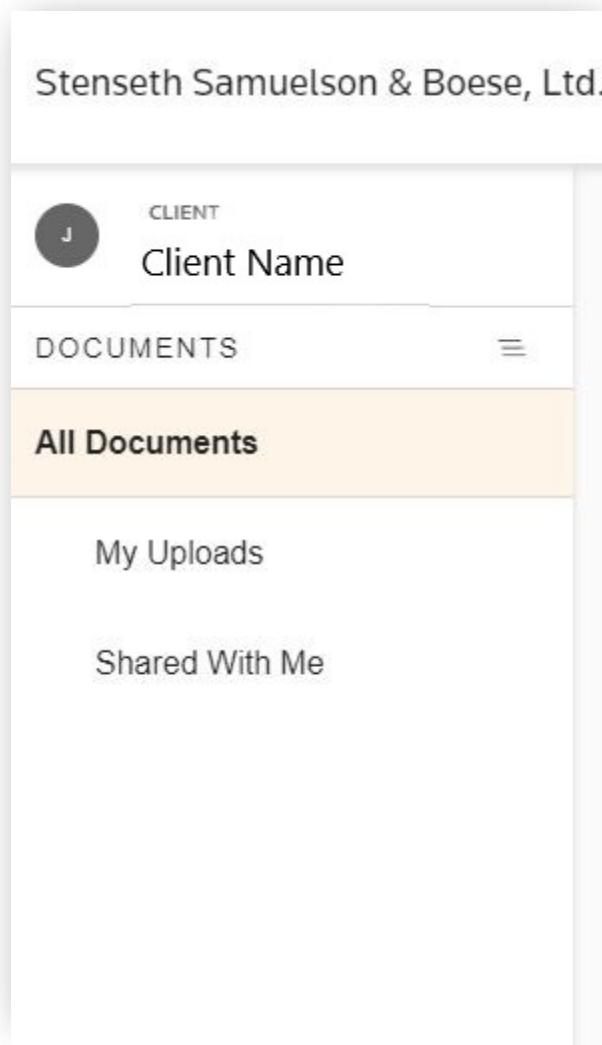


Uploading Documents into your Onvio Account.

After logging into Onvio, look at the top of the screen inside your online account and make sure that you are in the “Documents” section.

To upload a document, look for the + Add button which can be found at the top of the list of documents or on the bottom left corner of the page. Clicking this button will open up a dialog box that will allow you to search your computer for the documents that you need to upload.

If you don't see the + Add button, it is likely that you are currently looking at your documents through the firm folder view



To fix this problem, look for the three horizontal lines next to the Documents heading on the left side of the page. Hover over the lines, then if the text that comes up says “Simple list view” click on it to open a list of all the documents that have been uploaded. The list of folders should now look like the image on the left.

Uploading documents in the simple list view is best. The documents you upload will automatically show up in our files in a designated folder.

Troubleshooting tips:

1. You can upload more than one file at once, but you cannot upload folders. Depending on your network speeds, there may also be a limit to how many documents you can upload at once. To reduce the risk of the system timing out in the middle of an upload, we suggest uploading in batches of 10 or fewer documents.
2. You can delete documents that you upload to the documents folder in error, but you cannot delete documents uploaded to your account by your accountant.