

## Getting Started with Our Mobile App!

### Background

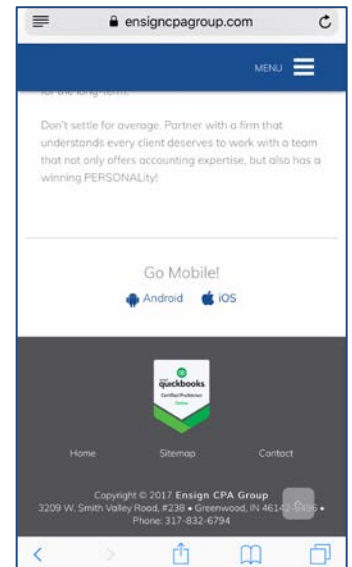
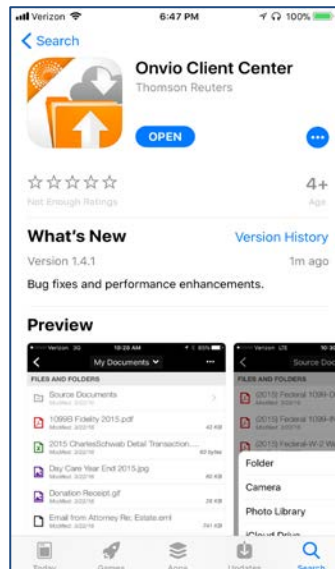
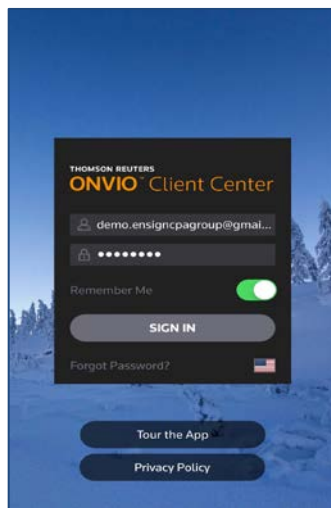
Think of our Onvio Client Center secure online portal and app as the hub for communication with our staff. Because it's optimized for smart phones and tablets, you can work with Onvio Client Center anywhere you want to be! Working seamlessly with Dropbox, Google Drive, and other popular document sharing solutions, it's easy for you to exchange documents and collaborate on edits with us in real time. There's no delay!

### Accessing the Mobile App

1. Ensign CPA Group will send you an invitation to your e-mail to **REGISTER NOW** (check your SPAM folder!). Once you have registered your e-mail and created a password for your Client Center Account, you're ready to Go Mobile!
2. Access the app via one of two methods. Either by your App Store or at [ensigncpagroup.com](http://ensigncpagroup.com)

- a. From your **App Store**, type **Onvio Client Center** into the search bar
- b. From [ensigncpagroup.com](http://ensigncpagroup.com), scroll towards the bottom of the main page and select **Go Mobile!** Scroll down the selection to **Onvio Client Center** and select either the Android or Apple store

3. **Download the app**
4. Once downloaded, click on the app and enter your Onvio Client Center **e-mail address** and **password**
5. Take a few minutes to view the short tutorial and get to know the functions



## Working In the Mobile App

### What You Can Do

1. Take photos of source documents with your mobile device and enhance them in the app (flip, crop, de-skew, flatten, etc.)
2. Quickly scan and upload multi-page documents with your mobile device's camera
3. Edit files in their native Microsoft programs (for example, excel) while you're in the app
4. Because you're viewing the same information in real time – even when you're in the mobile app – it's easier than ever to assist you with your questions

### Uploading Files to Client Center

1. First, select **Documents** on your home screen to access your shared files & folders
2. Within these files & folders you will be able to review, access, and manipulate documents within it

3. When you want to upload a file for us, click the plus button (+) on the bottom right of your app. You can upload files via your storage solution or take pictures.

4. To take pictures of your source documents, select the **Camera**
5. Take pictures of the documents and save them all as one large file or individual files to share

6. Once complete, check the **checkmark** to begin the upload

7. Name the file and click **Upload**  
Once the upload is complete, you will receive **confirmation** of its success. Good news – we will immediately be notified without you having to say a word to us!

