Client Center Cheat Sheet

Our online Client Center enables you to use nearly any Internet-enabled electronic device to do the following:

- ▸ Securely access your tax and other financial documents
- ▸ Take photos of documents and upload them to your account
- ▸ Drag and drop documents from other sources into your account
- ▸ Securely share documents with third parties
- ▸ Review and sign documents electronically
- ▸ Access and upload personal and business tax documents

This Cheat Sheet introduces you to key features of the SWC Client Center and how to use them.

Register for the SCW Client Center

Before you can access the Client Center, you have to register. We'll send you an email message with the subject line *Register Your Client Center Account*. Simply open the email message, click the **Register Now link**, and follow the instructions.

Log into Your SWC Client Center Account

Log into the Client Center at steeswalker.com/client-login, or download and install the Onvio Client Center mobile app from the Apple Store or Google Play Store and use it to log in.

Changing Accounts	If we handle both your personal and business taxes, your SWC Client Center account manages the paperwork for both. To switch accounts, **click your Client name** (top left) and choose the desired account from the dropdown menu.

Please note: The SWC Client Center is not compatible with Internet Explorer.

Edit Your Profile

To edit your profile, click your name in the upper-right corner of the Client Center, and **click Edit Profile**. You then have the option to do the following:

- ▸ Edit your account information, including your name and email address. (If you change your name or address, notify us directly, so we can change the information in our system.)
- ▸ Change your password.
- ▸ Enable or disable multi-factor authentication (MFA). (We strongly suggest you enable MFA.)

Access the Home and Documents Tabs

At the top of your Client Center are two tabs:

- ▸ **Click Home** to access tasks, such as signing a document or completing a request from our office.
- ▸ **Click Documents** to view and download documents sent to you and add document files you would like to share with our office.

Check Your To-Do List

Whenever we assign a task to you, such as a request to review or sign a document, we notify you via email. You can then log into the Client Center and click the Home tab to view your To-Do list, which appears on the left. **Click a task in the To-Do list** to view a detailed description of the task (on the right), along with options for completing it. After you've completed a task, it appears in the Completed list (below the To-Do list).

Get Help

Help is always just one click away. **Click the question mark icon** in the top right corner of the Client Center to display the Help menu. If you need help logging into or navigating the SWC Client Center, please call the SWC office at (858) 487-4580 during normal hours of 9 a.m. – 5 p.m. Monday through Friday.

Access Your Documents

To view and download documents shared with you and to upload documents you want to share with our office, **click the Documents tab**.

Remember, if we manage your personal and business taxes, you have separate client accounts for each. To view documents related to a different account, see "Changing Accounts" above.

> **Tips**
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> Use the *Search* box (top right) to find a specific document. Click a column head to sort the documents by that column. Click it again to reverse the search order. Click *All Time* (upper left) and choose a timeframe to limit the number of documents to a certain time period.

View a Document

To view a document, simply select its name. With the document in view, you can do the following:

- Use options in the toolbar above the document to print, download, or rotate the document.
- Click the arrows to the left or right of the document to flip from one page to the next or previous page.
- Use options below the document to flip from one page to the next or previous page or to zoom in or out.

Download a Document

To download a document, **click the check box next to the document**, then click **Download** (in the toolbar above the document list).

Send a Document

To send a document as an attachment via email, **click the check box next to the document**, then click **Send** (in the toolbar above the document list). Enter the requested information, including the recipient's email address, and **click the Send button**.

Upload a Document

To upload documents to share with our office, choose either the + **Add Document** button on the bottom left, or the + Add button within your central display. The **Add Document** box appears, providing several ways to upload document files:

- Drag a file from your computer into the box.
- Click the **Browse for File** button and use the resulting dialog box to select the desired files.
- Click the button for Google Drive, Dropbox, or Box, and use the resulting dialog box to choose the desired files.

After adding the document files to the **Add Document** box, click the **Upload** button.

Sign a Document

We will email you when we need you to review and sign a document, and the request will be posted to the To-Do list in the Client Center. To sign a document, **log into the Client Center, click eSignature Request** in your To-Do list, and follow the onscreen instructions.

After you sign a document, it's moved from the To-Do list to the Completed list.