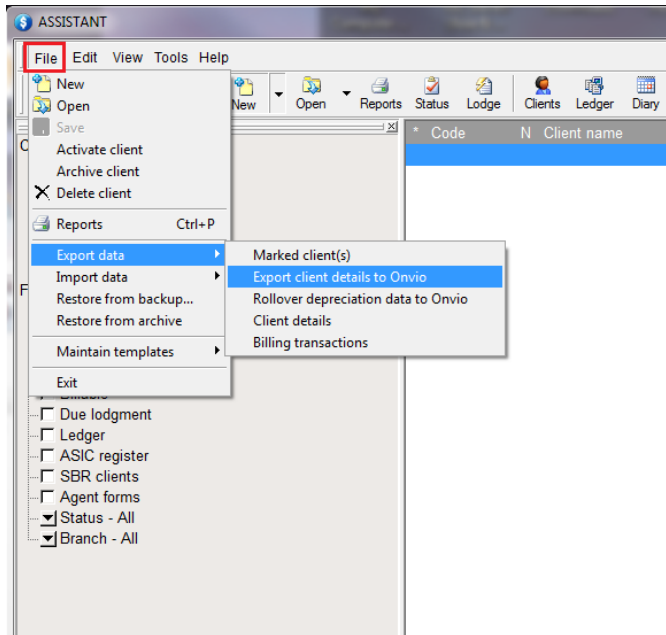


Onvio Migration

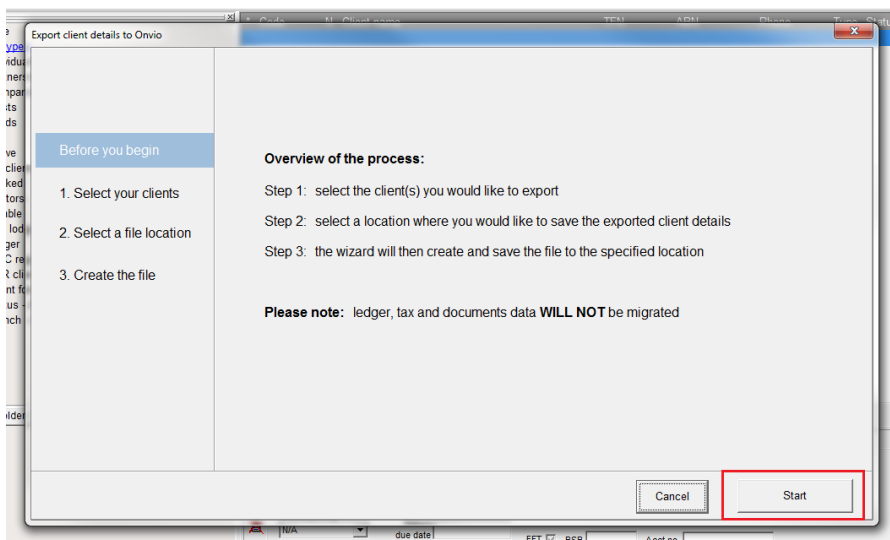
Please follow the steps below to migrate client details from Tax Assistant into Onvio.

Preparing export file:

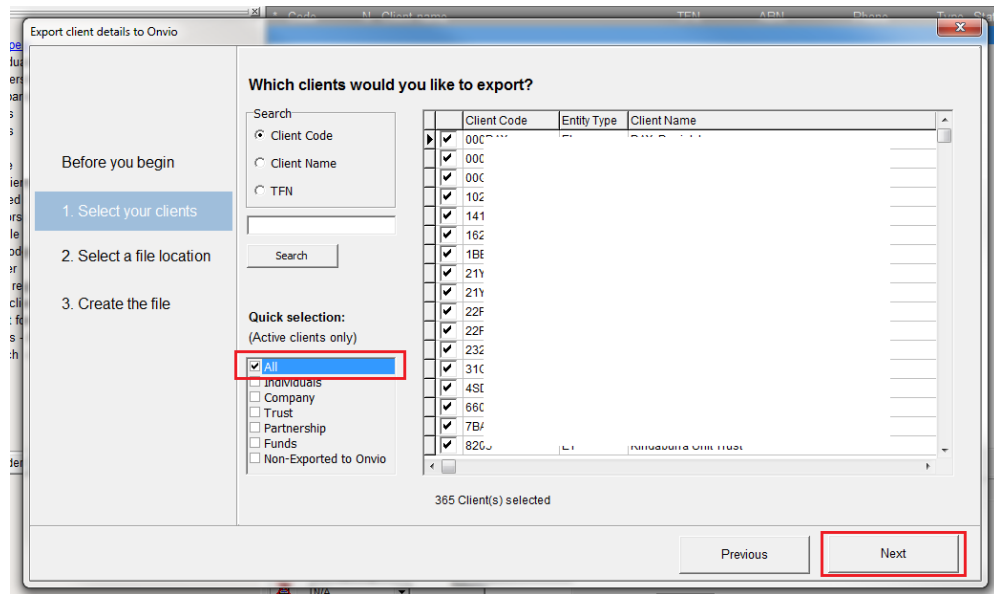
1. In Tax Assistant, click on '**File menu > Export data > Export client details to Onvio**'



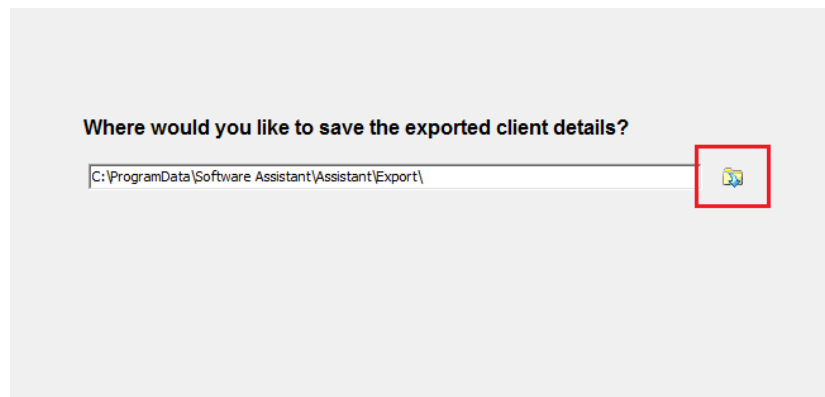
2. Then on the Export screen, click on the **Start** button



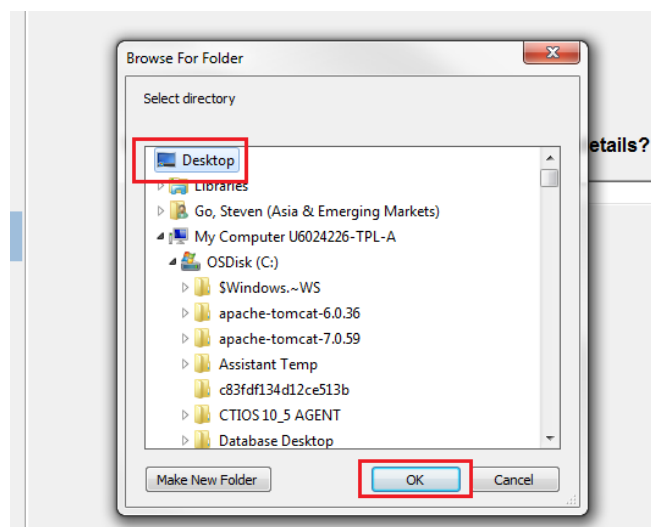
3. Tick '**All**' under **Quick Selection** to mark all your clients for export, then click on the **Next** button



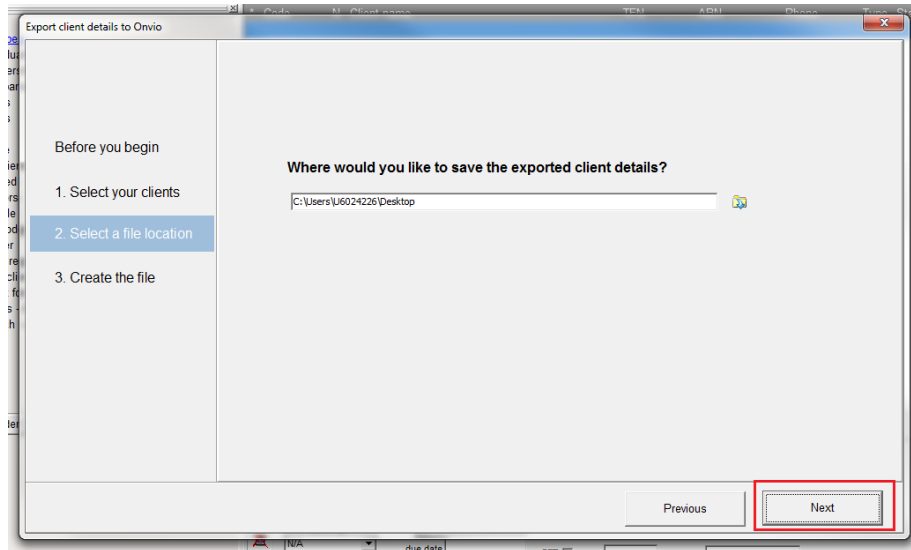
4. Choose to save the export file to the desktop by clicking on the small folder icon



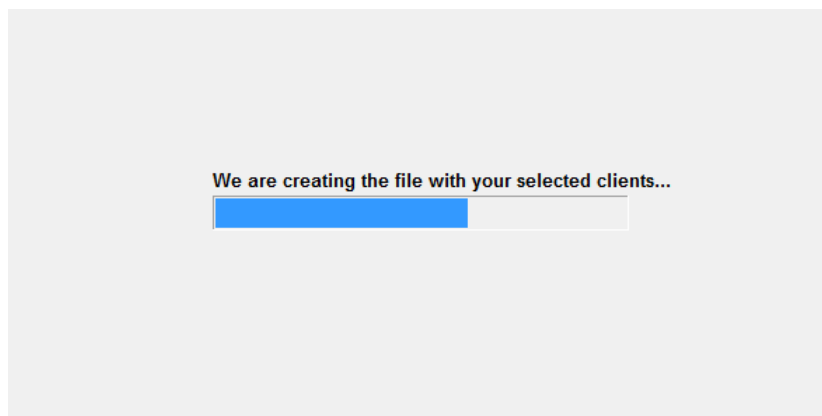
5. Select **Desktop** and then click **OK**



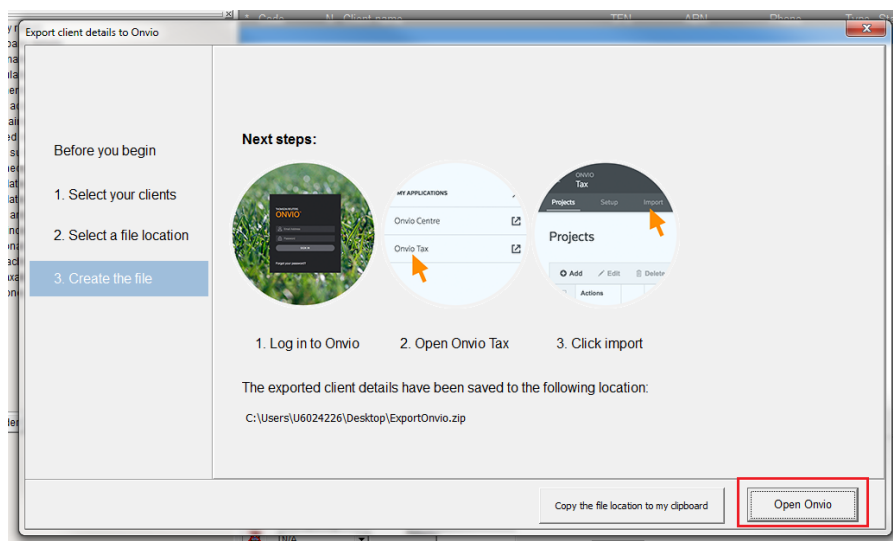
6. Then click **Next**



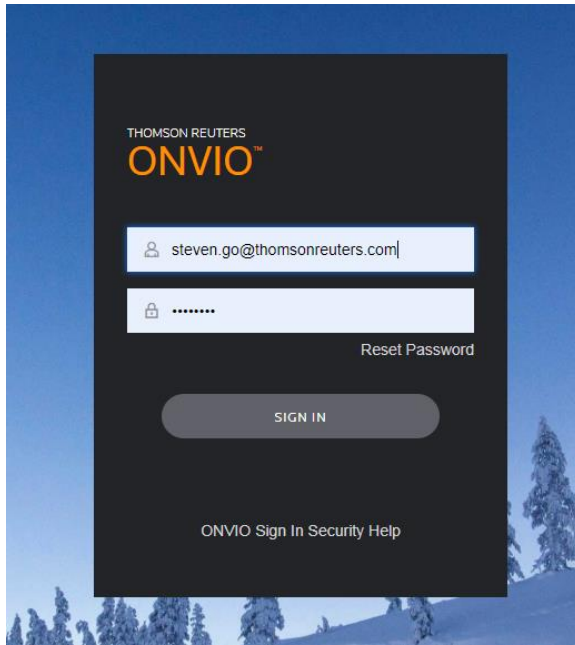
7. Wait for the export file to complete



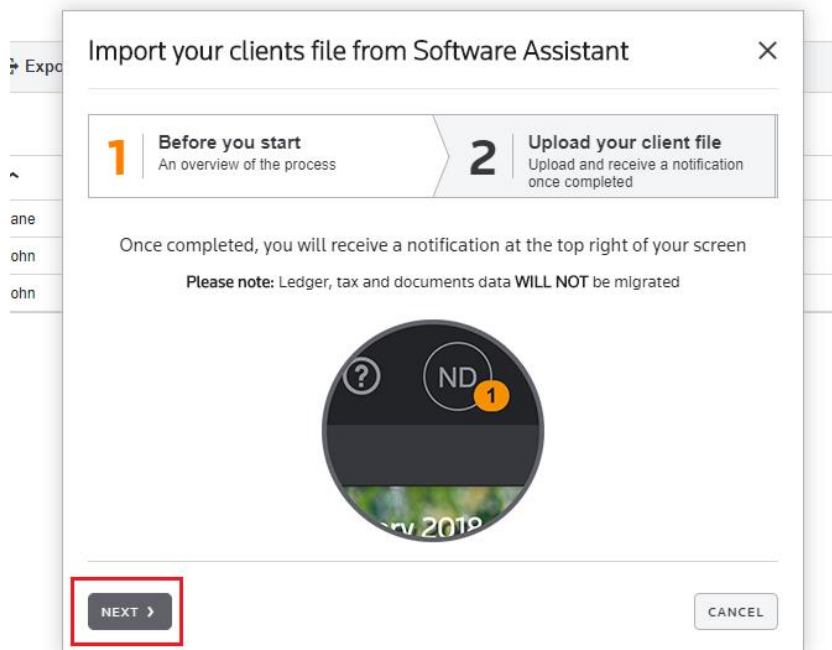
8. Then once finished you will see another screen. Click on **Open Onvio** to launch Onvio



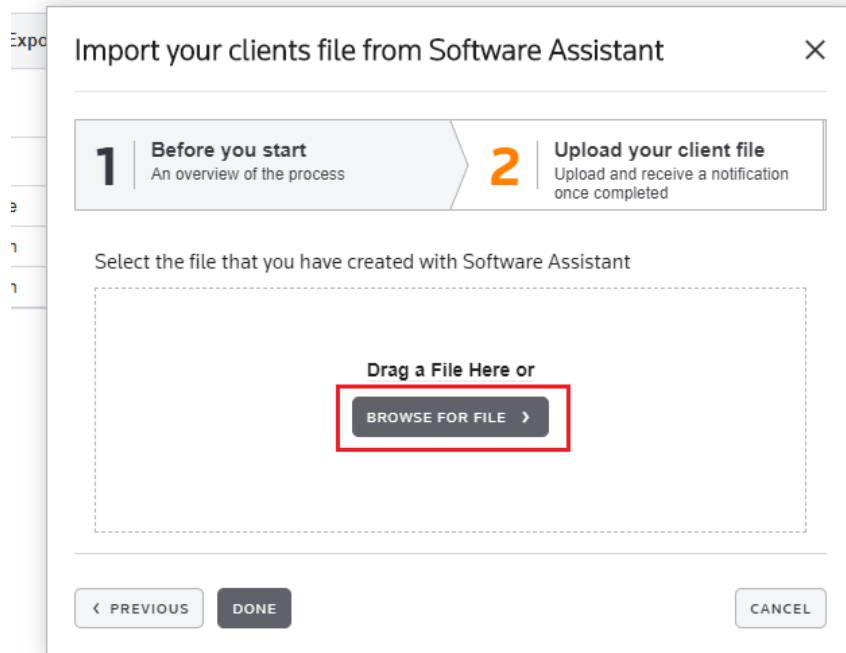
9. Login to Onvio



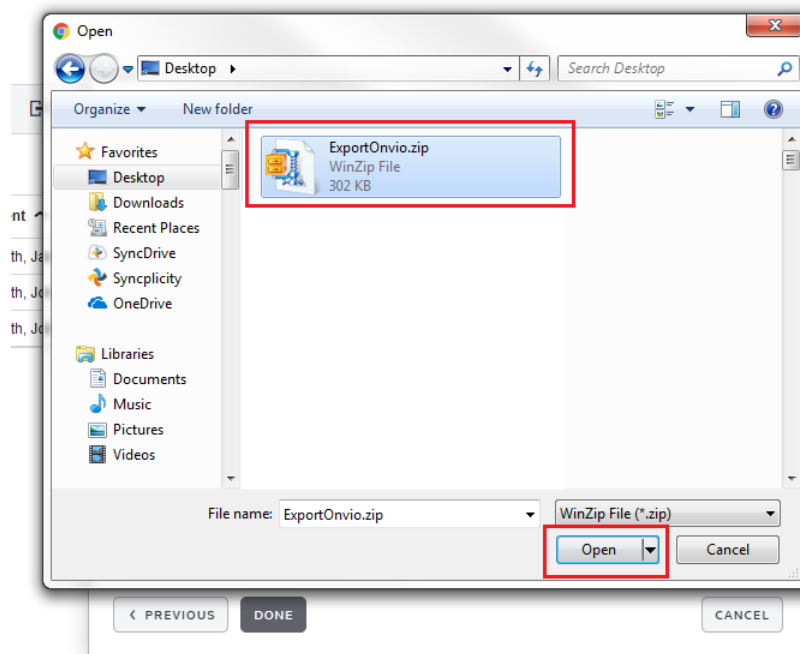
10. Once logged in, you will automatically be taken to the **Import** screen. Click on the **Next** button to start the import



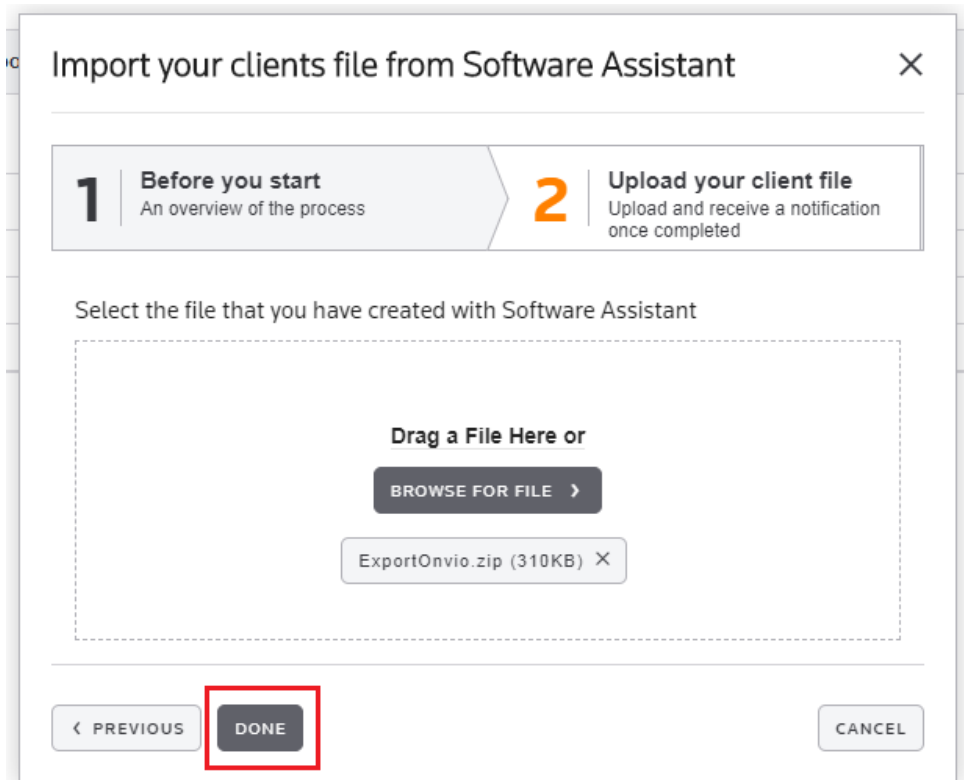
11. Click **'Browse for file'**



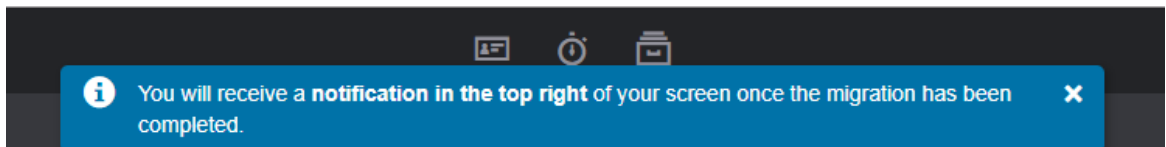
12. Select the **'ExportOnvio.zip'** file from your desktop. Then click **Open**



13. Then click **Done**



14. You will then see a message at the top of the screen. The import process will now start and will take some time to complete. You are now free to do other work while it finishes



15. You will receive a notification in your user side panel once the migration has completed.

The screenshot shows a user profile for Steven Go. The profile includes a placeholder for a profile picture, the name "Steven Go", the email address "Steven.go@thomsonreuters.com", and a "View Profile" link. There are also "Change Photo" and "SIGN OUT" buttons. Below the profile is a status indicator showing "Away" and a "NOTIFICATIONS 1" button. A notification is displayed, stating: "The import of Software Assistant clients have been interrupted, only 363 clients have been created successfully but failed to create 1 clients." The notification includes an information icon, a timestamp of "6 minutes ago", and a "Mark as Read" link. The notification is highlighted with a red border.