



## Secure document exchange portal

Register for Client Center



Dear Valued Client,

We now use **Client Center**, a secure web portal, to easily exchange files and communications (tax questionnaire, supporting documents, and returns). This is a web portal that you log in to, with helpful features and even a mobile app option. Use the following steps and resources to get started.

! You will receive a **Registration email** with the subject line “Dalton CPA, LLC – Register Your Client Center Account” from the address [no-reply@onvio.com](mailto:no-reply@onvio.com).

### **STEPS TO COMPLETE:**

- Click the orange *REGISTER NOW* button in the middle of the registration email. You will create a login using an email address, and also a password.
- Remember the email address you use for the login. If you forget your password, you can click a link below the login area to Reset Password via email on the Onvio Client Center login page.
- Create a bookmark or favorite on your web browser for the <https://www.daltoncpallc.com/client-login> page.

Watch this [3 Minute Video](#)....to review how to register, update your profile, and use the portal’s features.

### **ADDITIONAL RESOURCES:**



Interested in the [Mobile App](#)? You can search “Onvio Client Center” on your phone’s app store.



Add an additional level of security on your portal login by setting up [Multi-Factor Authentication](#)!

[Help & How-To Center](#)