



# LNK Accounting Solutions

## Client Onboarding Guide



Welcome to LNK Accounting Solutions!

We are excited to have you join our Client Base and look forward to building together. This guide provides an overview of systems you will use as an LNK client, along with some best practice tips and links to FAQs for each system.



## Software You Will Use

- **Onvio** – Onvio is a cloud-based client collaboration platform that provides enterprise-level security and multiple levels of protection. We will collaborate in your [Client Center Portal](#) to efficiently and securely request, send and store your sensitive information needed to complete our engagements. If you subscribed to the Individual Tax Subscription, or have otherwise engaged us to prepare your Individual Tax Return, you will use the Client Center to complete your Tax Questionnaire.



**Client Center Portal**

### [Onvio Client Center Quick Start Guide](#)

- **How to set up your Onvio Portal** (Pg. 1-2)
  - **How to properly upload documents to Onvio** (pg. 4-7)
  - **How to use Onvio Client Center Portal on your Mobile Device** (Pg. 8-13)
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- **1Password** – 1Password is a password manager and vault to securely store multiple passwords using one Master Password unique to you. We will assign you a private vault to store and update login credentials that we may request throughout the course of our engagement.



**1Password**

- [How to Get Started](#)
  - [How to Save, File and Change Your Passwords](#)
  - [If You Forgot Your 1Password Account Password or Can't Unlock the App](#)
  - [How to Find Your Secret Key or Setup Code](#)
  - [How to Change and Strengthen Your Passwords](#)
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- **QuickBooks Online** – QBO is an accounting software you will use for bookkeeping engagements.



**QuickBooks Online**

- [How to Connect Bank and Credit Card Accounts to QBO](#)
- [Using PayPal and Venmo](#)
- [Email Receipts and Bills](#)
- [Learn about Chart of Accounts](#)