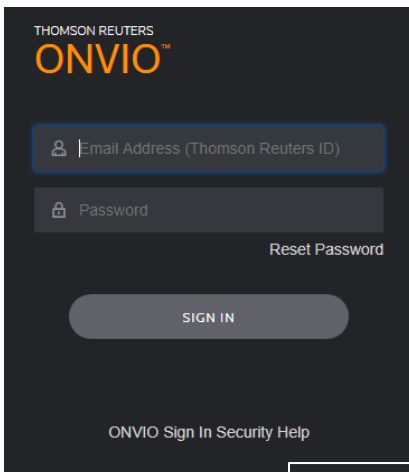
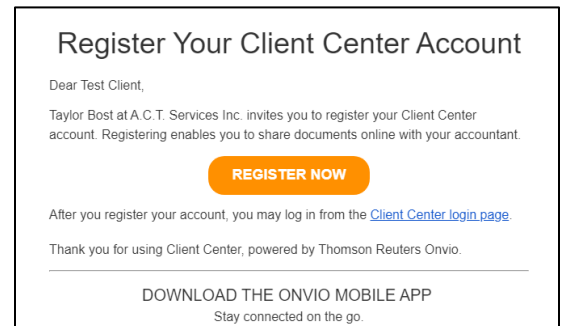


GETTING STARTED

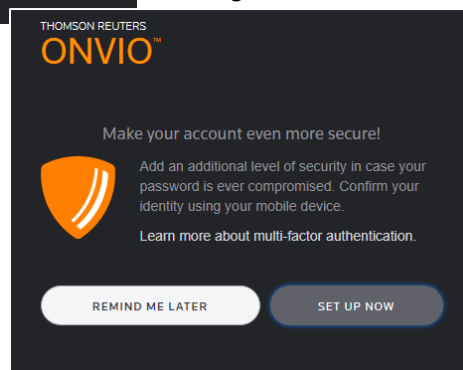
TO REGISTER YOUR ACCOUNT:

1. Open the email from Onvio to Register Your Client Center Account and click the **Register Now** button.
2. Fill in account information and create a password. Review password requirements in Figure 1.
3. Press **Register Me**.
4. You will be redirected to a page displaying a success message.



TO LOG IN:

1. Access your Client Center by opening an internet browser and going to our website at <https://www.actservices-inc.com>. Click the **SIGN IN** button in the Client Center box to take you to the log in page.
2. Enter your username and password. Press **SIGN IN**.
3. You will receive a message prompting you to set up multi-factor authentication for an additional level of security. NOTE: This is not required. You may choose to **SET UP NOW** to add MFA, or you may choose **REMIND ME LATER** to bypass this offer.
4. Your Client Center Home Page will display. NOTE: The first time logging in to your portal, you will receive a window displaying a welcome message. See Figure 2.



ABOUT MFA:

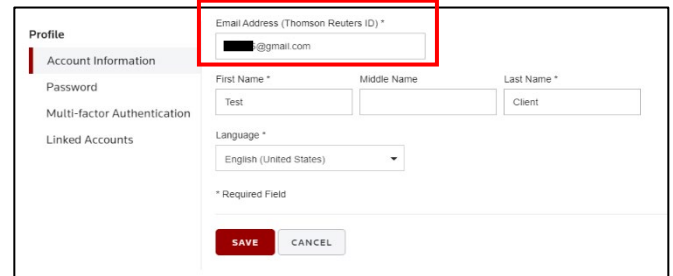
1. Multi-Factor Authentication is a security feature available to require a second method of verification when logging in to your account. This can be a fingerprint ID, face ID, or a numeric code captured through your device or smartphone.
2. To activate MFA on your account, you will need to download the Thomson Reuters Authenticator mobile app and press **SET UP NOW**.

ACCOUNT & PASSWORD

UPDATING EMAIL/THOMSON REUTERS ID:

If you need to change the email address used to log in, this is also called your Thomson Reuters ID.

1. First, log in to your portal account.
2. Once logged in, find your profile in the top right corner of your home page and click **Edit Profile**.
3. On the account information tab, you will see your email address at the top. Change or update your email.
4. Click **SAVE**. Remember this is now your email address (Thomson Reuters ID) to log in.



NOTE: The Profile menu is also where you can change your password or MFA settings.

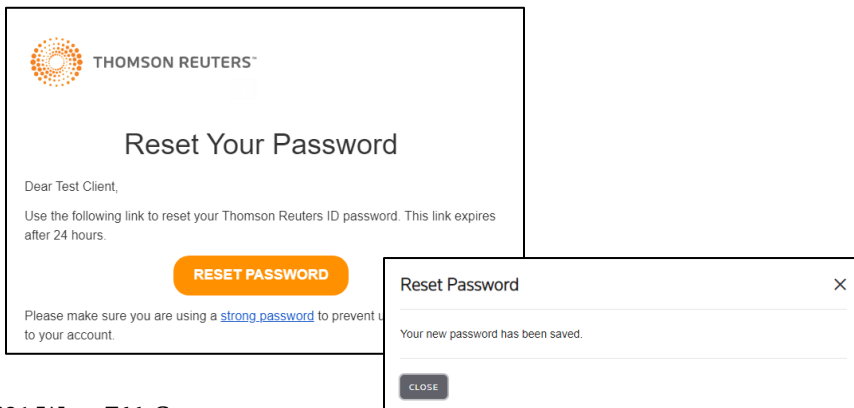
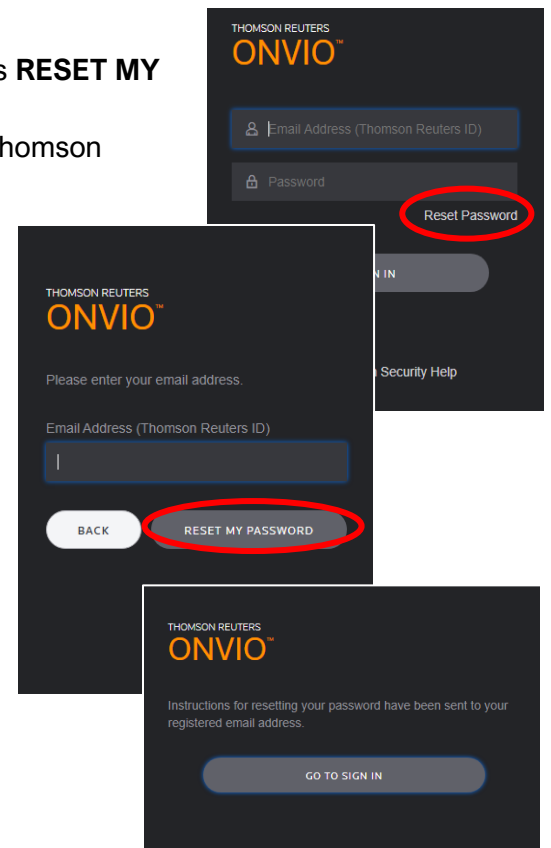
RESETTING PASSWORD:

Passwords can sometimes be tricky. There may be a time when you need to reset it (i.e. forgotten, expired, etc).

1. On the Login page, click **Reset Password**.
2. Verify your email address, which is your Thomson Reuters ID. Press **RESET MY PASSWORD**.
3. Go to your email inbox. Open the email from Onvio to Reset Your Thomson Reuters ID Password. Click **RESET PASSWORD**.

NOTE: This email link is only active for 24 hours.

4. Create a new password. Review the password requirements in Figure 1.
5. When you have successfully reset your password, you will see a message window that says your password has been saved.
6. Click **CLOSE**.
7. Return to the Login page and log in using your new password.

CLIENT CENTER HOME PAGE OVERVIEW

TO-DO TASKS

Your to-do tasks will appear in the center of your home page. The left panel also provides a listing of your open and completed tasks. These to-do's will be things like eSignature Requests and Document Requests.



All Tasks Completed

You will be notified about any additional requests.
More documents to share?

[Add more documents.](#)



TEST CLIENT ▼

HELP

Click on the little circle with a question mark to find helpful resources and a search bar to discover the answers to your questions about the portal.

PROFILE

Your profile is located on the top right of the home page. By pressing your name, a drop-down menu will appear.

EDIT PROFILE

Choosing **Edit Profile** will allow you to update/change your password, set up MFA, or manage your linked accounts.

LOGGING OUT

When you are ready to log out of your portal account, click your profile name for your drop-down menu. Press **SIGN OUT**.

Test Client

████████@gmail.com

[Edit Profile](#)

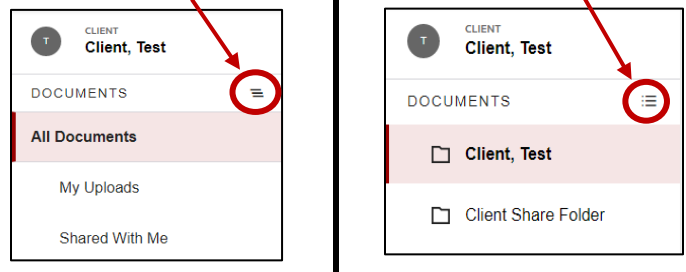
SIGN OUT

CLIENT CENTER DOCUMENTS OVERVIEW

DOCUMENTS VIEW

In this screen you will store, organize, and retrieve your files. You can toggle between your A.C.T. Services documents view and a simplified list view by clicking the menu symbol to the right of your name.

IMPORTANT: If you are a business owner or have multiple entities, there is a triangle next to your name. Click on the triangle for a list of your entities. Choose the entity in which documents you would like to access.



Click on this triangle to view another entity's documents

ALL DOCUMENTS

Documents are listed in the center of the screen, showing: Name, Associated Task, Added By, and last date Modified.

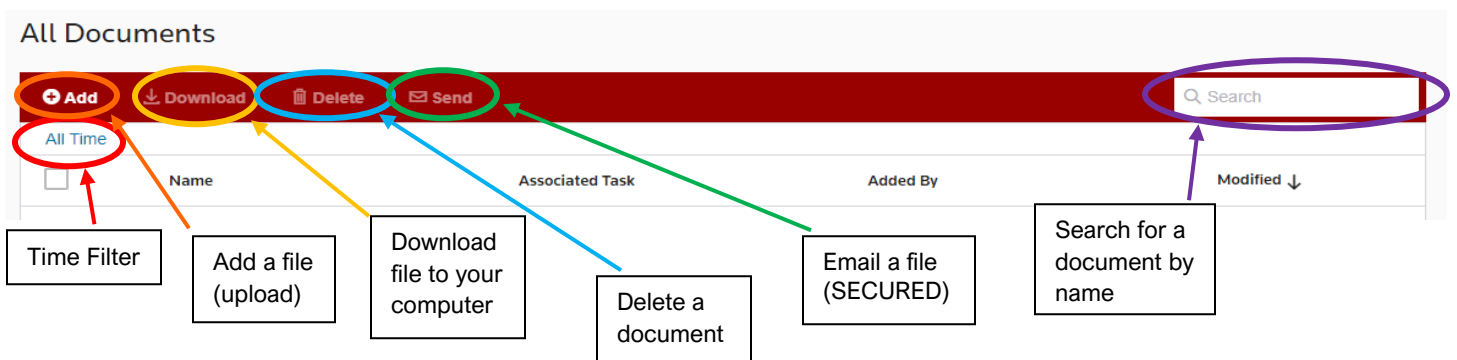
DOCUMENTS BAR

Across the documents bar you will find various commands to manage your documents.

You can use keywords in the search bar to quickly narrow down your list.

You can use the time filter to concentrate on more recent months or years.

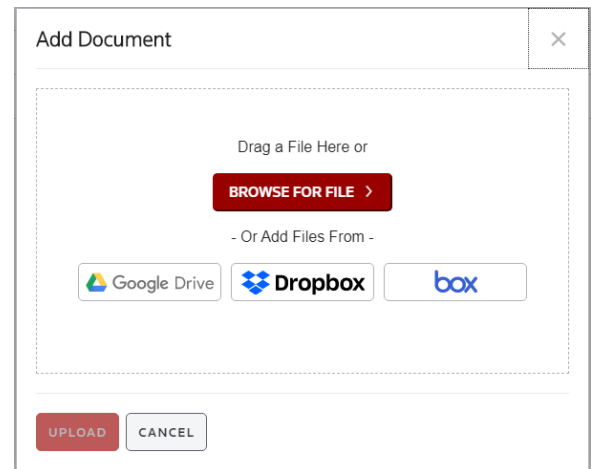
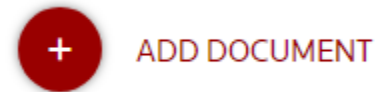
You can email portal documents to individuals, and even assign and require a passcode. Onvio sends an email with a secure link to click for viewing.



SENDING & RECEIVING A DOCUMENT OR FILE

TO UPLOAD:

1. From the Documents Tab, on the left-side pane at the bottom, select **Add Document**. You can also choose +Add on your Documents bar.
2. A new window will appear to drag, browse, or add a file. It is important to know where you saved your file so that you may choose the option that corresponds to your file location. (e.g. If your file is stored on your desktop, choose **Browse For File**; if it is a DropBox file, choose **DropBox**; etc.) See Figure 3.0
3. Once you've selected your stored file location, a new browser will allow you to navigate to the file that you would like to upload. See Figure 3.1.
4. Select or highlight the file you wish to upload, press **Open**. With the document you've chosen listed on the previous window, press **UPLOAD**.
5. When the uploading is complete, the document name and file information will appear across the screen.



TO DOWNLOAD:

1. Check the box next to the file you wish to download by clicking it.
2. Find the download icon across your Documents Bar. Click **Download**.
3. If prompted, select the location where you would like the file to be saved and click Save.
4. Remember which folder or location you downloaded the file to, it usually defaults to your downloads folder.



FIGURE 1.

Password Requirements

Your password **must** have **at least 8 characters** and 4 of the following:

- At least 1 number (0-9)
- At least 1 lowercase letter (a-z)
- At least 1 uppercase letter (A-Z)
- At least 1 special character (punctuation): ` ~ ! @ # \$ % ^ & * () _ - + = { } [] \ | : ; " ' , . ? /

Your password should **not** use:

- words from the dictionary
- your user ID
- sequential letters or numbers such as "abc" or "123"

FIGURE 2.

Welcome Message

Welcome to Client Center! ×

Your Client Center account allows you to securely share information and documents with A.C.T. Services Inc..

Here's how it works:



Tasks appear as items in the To-Do list on the left of the screen.

A.C.T. Services Inc. will assign you tasks to complete, such as answering questions, uploading documents, and signing forms.



Want to finish a task later?

You can move on to other tasks, and return to incomplete tasks later. Your data is saved automatically.



Don't think a task applies?

Click Does not apply to remove a task from the To-Do list.



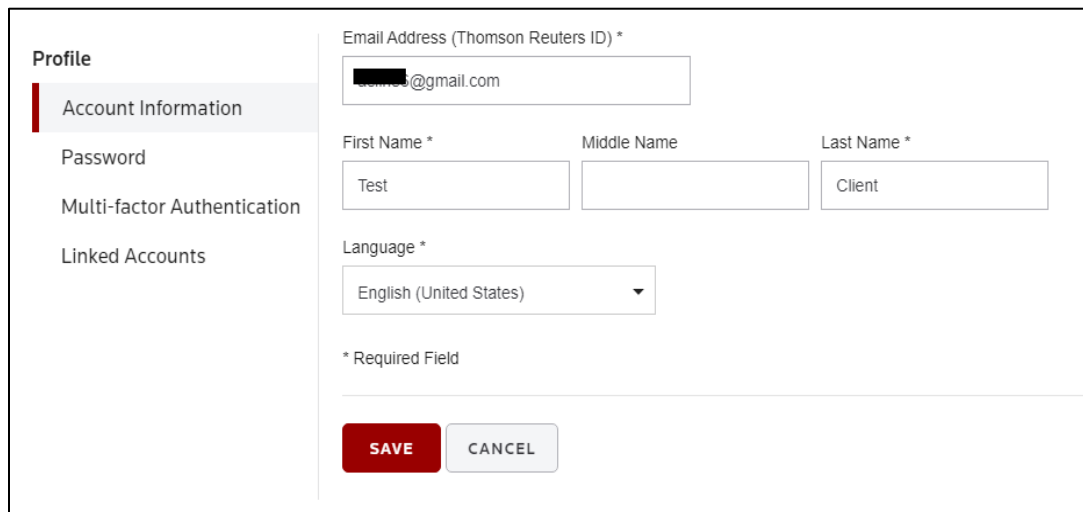
Completed a task?

Click the Mark as Complete button to move a task to the Completed list. This informs A.C.T. Services Inc. that the information is ready for review.

CLOSE & GET STARTED

FIGURE 3.

Profile

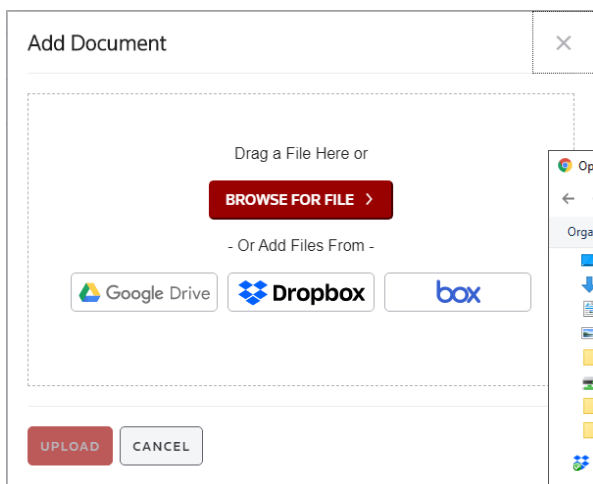


The screenshot shows a 'Profile' page with a sidebar on the left containing 'Account Information', 'Password', 'Multi-factor Authentication', and 'Linked Accounts'. The main content area includes:

- Email Address (Thomson Reuters ID) ***: A text input field containing a redacted email address followed by '@gmail.com'.
- First Name ***: A text input field containing 'Test'.
- Middle Name**: An empty text input field.
- Last Name ***: A text input field containing 'Client'.
- Language ***: A dropdown menu set to 'English (United States)'.
- * Required Field**: A note indicating that fields with an asterisk are required.
- SAVE** and **CANCEL** buttons at the bottom.

FIGURE 4.0

Choose File Location

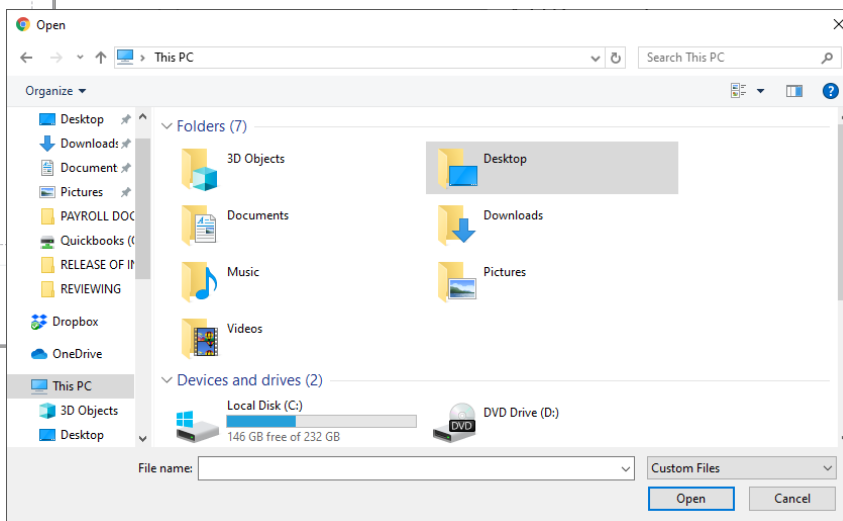


The screenshot shows an 'Add Document' dialog box with the following elements:

- Header: 'Add Document' with a close button (X).
- Instruction: 'Drag a File Here or'.
- Primary Action: A red button labeled 'BROWSE FOR FILE >'.
- Secondary Action: '- Or Add Files From -'.
- Options: Three buttons for external services: 'Google Drive', 'Dropbox', and 'box'.
- Footer: 'UPLOAD' and 'CANCEL' buttons.

FIGURE 4.1

Browse for File



The screenshot shows a Windows 'Open' file dialog with the following details:

- Window Title: 'Open'.
- Address Bar: 'This PC'.
- Organize Menu: Open.
- Left Pane: Shows 'Folders (7)' (Desktop, Downloads, Documents, Music, Videos) and 'Devices and drives (2)' (Local Disk (C:), DVD Drive (D:)).
- Right Pane: Shows a view of the 'Desktop' folder containing 'Desktop', 'Downloads', and 'Pictures' sub-folders.
- File Name Field: Empty.
- File Type: 'Custom Files'.
- Buttons: 'Open' and 'Cancel'.