Onvio FAQ

Onvio Quarterly Webinar FAQ

A LIST OF QUESTIONS COMPILED FROM THE ATTENDEES OF THE QUARTERLY WEBINAR - 24 NOVEMBER 2020

Tax & Accounting Product and Support Teams

QUESTION

Is the Onvio Tax Questionnaire available?

Answer: Yes, this is available within Digita Personal Tax 20.2. You will need to have used the “Send to Onvio” process from Digita Practice Management (Contact Manager) to make sure your clients have the correct Onvio Client ID linked with their record.

QUESTION

Can we ask clients to add free format text responses when sending using e-signing within Onvio? EG. Fill in the blank?

Answer: This isn’t currently available. If you need ad-hoc information from a client, we would recommend using the Request functionality in Onvio. This provides a central location for staff to see all information that has been requested and also the status of the request.

QUESTION

Can we batch import Time & Billing data into Onvio?

Answer: The import WIP and Ledger items via a spreadsheet will be available early in 2021.

QUESTION

What integration will there be between Digita Practice Management and Onvio Time & Billing?

Answer: You can integrate the client list between Digita Practice Management and Onvio. The time and sales ledger do not integrate. Onvio Time & Billing will ultimately replace Digita Practice Management, although we do not have a time frame for this. Some firms with simplified requirements are already moving, others are waiting for the product’s functionality to increase.

QUESTION

Why can I see closed Projects when I’m posting time?

Answer: We have investigated this; it was a bug that has now been resolved.