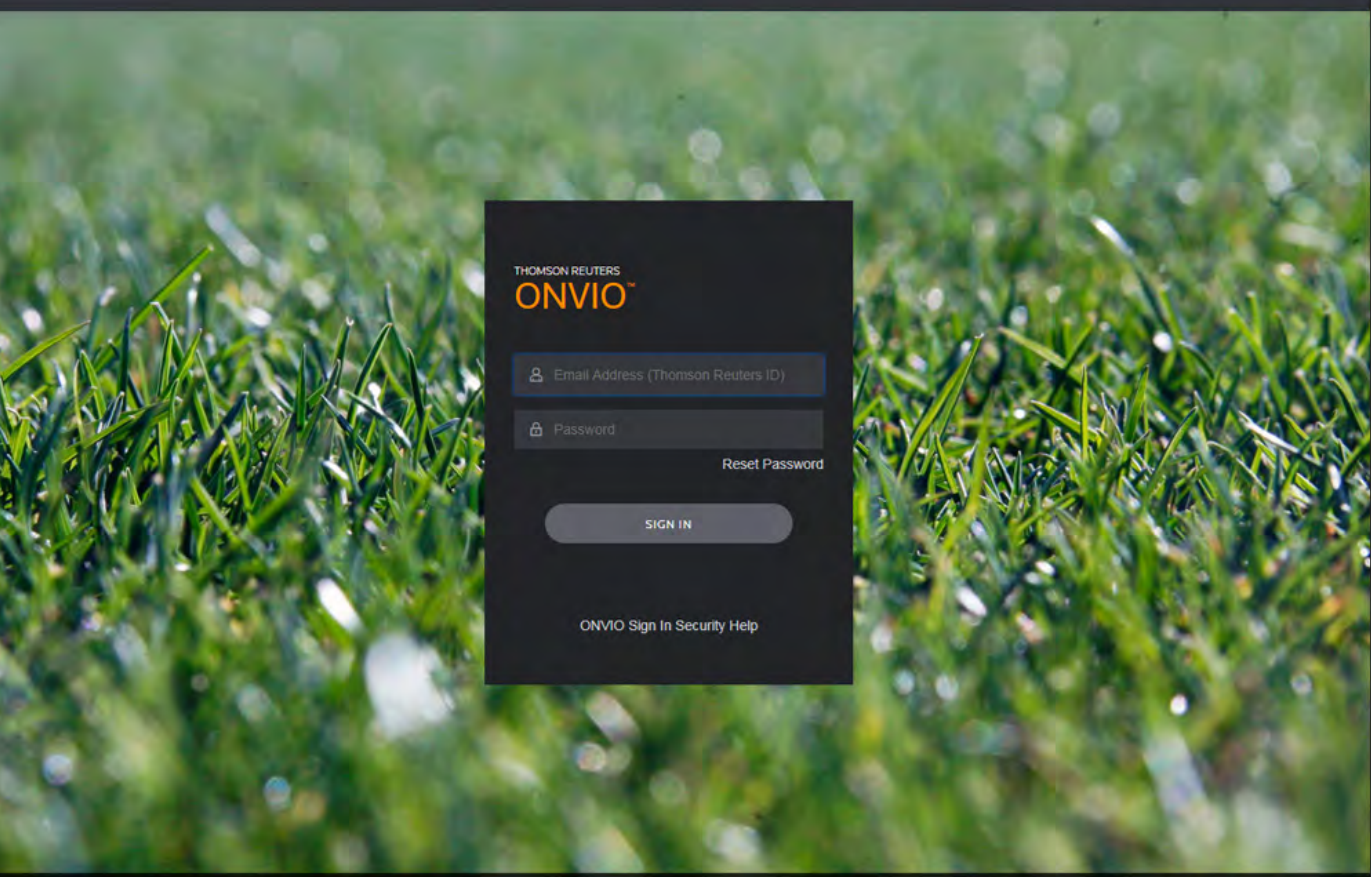




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What is
Onvio?

We've drawn on our knowledge and capabilities to forge our Onvio suite — a powerful set of solutions that will propel your practice into a future where there are no limits.

ONward + VisIOn = ONVIO

A person wearing a dark suit jacket and a white shirt is sitting at a table. They are holding a smartphone in their left hand and using their right index finger to tap the screen. On the table in front of them is a silver laptop with a black keyboard. To the left of the laptop is a white coffee cup filled with dark coffee, sitting on a matching white saucer. The background consists of a window with a dark metal grid pattern, through which bright sunlight is streaming, creating a warm, golden glow. In the upper right corner, there is a solid orange circle containing white text.

It's all in the
connections.

All about Thomson Reuters Onvio

The cloud-based future of tax and accounting software

To be successful in today's tax and accounting profession, you've got to stay ahead of the curve. That means you need to anticipate the opportunities in a complex landscape, be prepared to react quickly to changing legislation, equip your firm to provide the services and insight your clients and staff demand, and most of all, deliver meaningful results for your clients — wherever and whenever they need it.

Enter Thomson Reuters® Onvio: The next step in the evolution of tax and accounting software.

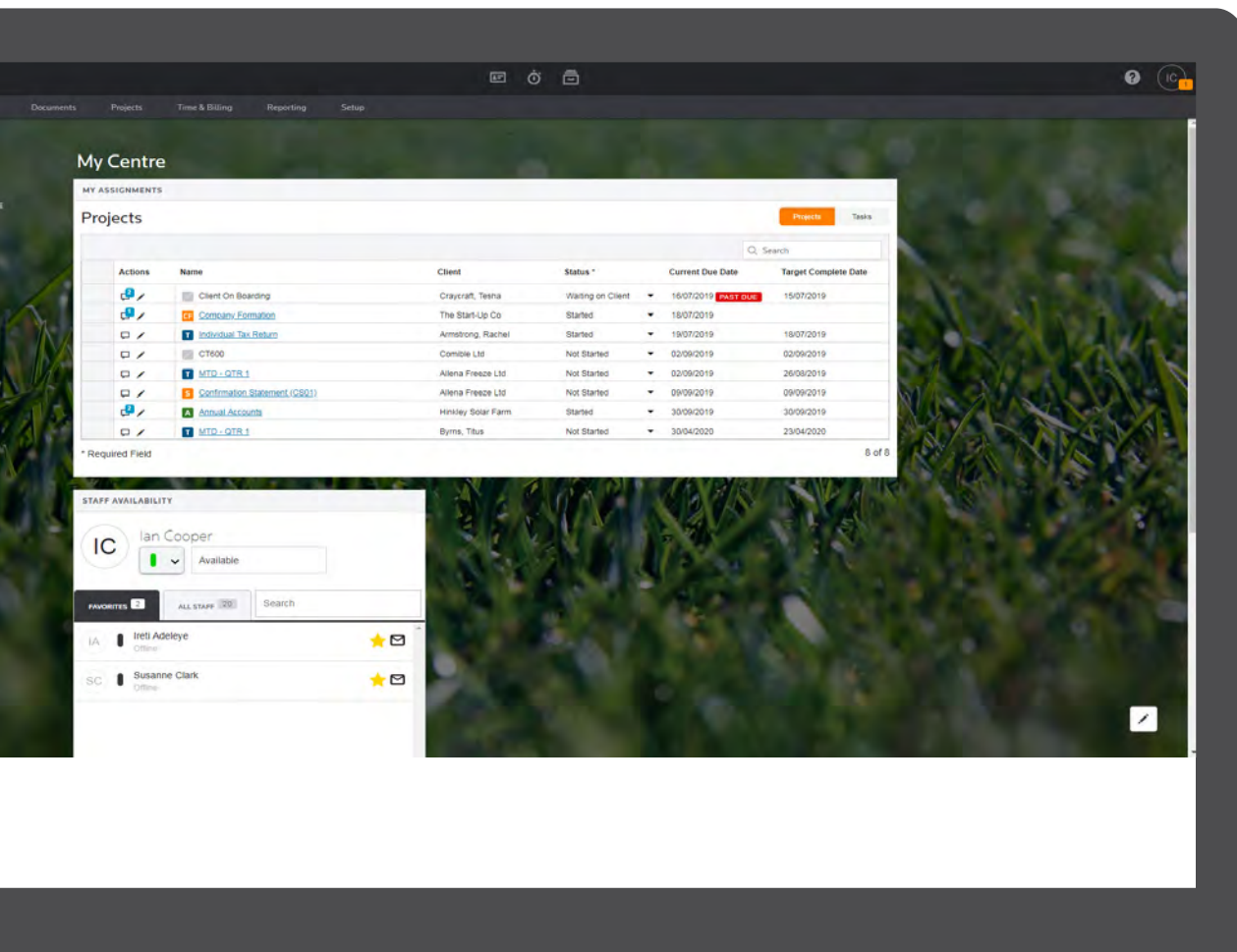
A suite of innovative cloud-based products for tax and accounting professionals, Onvio brings everything you do together into one online platform, so your team can work together with the speed, flexibility, and information you need to keep pace in a fast-changing profession.

The integration capabilities of Onvio make it easy to adjust for perpetually evolving regulatory requirements, with content and advice that's always up to date. And the flexibility of Onvio means that as your needs and your clients' needs change and grow, Onvio can grow with you.

Backed by Thomson Reuters

Because the security of your data is a top priority, we dedicate a huge amount of resources to providing state of the art functionality to protect your clients information.

Read on to discover how you can move forward into a new era of superior client service and increased productivity and profitability with Onvio — the cloud-based future of tax and accounting software.



Flexible. Powerful. Together.

Tailor Onvio to your firm's work style

The modular approach of Thomson Reuters Onvio means that with Onvio powering your firm, you can create, modify, and share documents, track all key stages of your workflow, and stay synchronised with colleagues and clients on a single, universally accessible platform.

Work anytime, anywhere. Because Onvio is accessible online from your desktop, laptop, or mobile device, you and your staff have the freedom to work where, when, and how you choose.

That means secure, seamless connectivity across your organisation and with your clients.

Share data seamlessly. The heart of Onvio is its intelligent workflow. Whether you're importing client documents, or updating a project status, you never have to worry about updating information in multiple places — since all products share the same database, there's no manual synching required. And because Onvio works with popular document sharing solutions such as Dropbox®, Google Drive™, and Box, it's simple to keep everyone on the same page.

Make it easy. Since every Onvio product shares the same intuitive interface, you'll pick it up quickly and enjoy a consistent, familiar experience across the suite.

Keep it convenient. Manage all your internal resources, from client, contact, and staff information to timesheets and security via a comprehensive administrative portal.

Streamline your workflow with clients. It's a breeze to exchange documents and files with your clients, thanks to the easy-to-use sharing capabilities of Onvio Firm Management.



Thomson Reuters Onvio Firm Management: Document Management

Secure document management plus cloud collaboration

Demand for collaborative tools and anywhere/anytime access to information continues to increase. Clients expect the firms they do business with to provide them with an efficient and secure way to collaborate and exchange information.

Onvio Firm Management provides cloud-based, easy-to-use document management, with innovative collaboration capabilities and an intuitive interface. Client collaboration functionality and direct integration with the Digita Professional Suite enable simple user and firm administration, allowing your firm to work seamlessly with your clients to collect source documents and distribute deliverables.

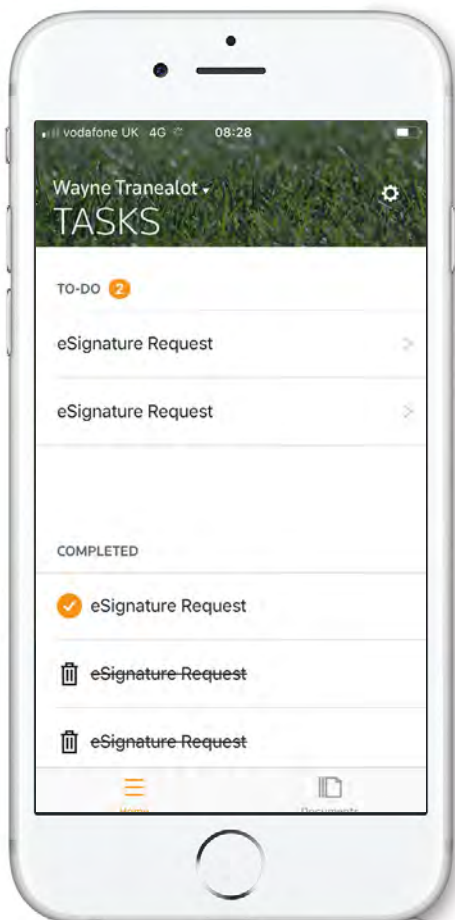
With Onvio Firm Management, you'll be able to:


- Direct from Onvio Documents you can request eSignatures for any PDF documents
- Easily onboard new clients by importing documents from Google Drive, Dropbox, and Box
- Quickly scan and upload documents from other applications
- Find the information you need by using full-text search across a variety of document types, including Microsoft® Word and PDF
- Drag and drop files from desktop and web
- Customise your folder structure to fit your workflow
- Manage clients and staff from a single user-friendly administration module
- Rest easy knowing your data is secure and encrypted whether in transit or at rest on our servers

The Request feature provides a secure location where clients can respond to messages and upload files via encrypted links that allow for easy, safe document sharing. So you never have to worry about sending sensitive data through email or other, less secure methods.

Source document scanning goes mobile

Take photos of source documents with your mobile device and enhance them on the spot with the Onvio Documents and Onvio Client Centre apps.





Onvio Documents
and Onvio Client
Centre mobile apps

**Functionality
on the go.**

Onvio Firm Management has two mobile apps available for your staff and clients. These apps, Onvio Documents and Onvio Client Centre, will give you the document and client collaboration functions of Onvio Firm Management, plus the ability to:

- Take photos of source documents with your mobile device and enhance them in the app (flip, crop, de-skew, flatten, etc.)
- Quickly scan and upload multipage documents with your mobile device's camera
- Answer client questions with ease, since you're viewing the same information in real time, even when you're in the mobile app

Learn more about Onvio Firm Management at:
tax.thomsonreuters.co.uk/onvio/firm-management

Thomson Reuters Onvio Firm Management: Client Collaboration

True client and staff collaboration

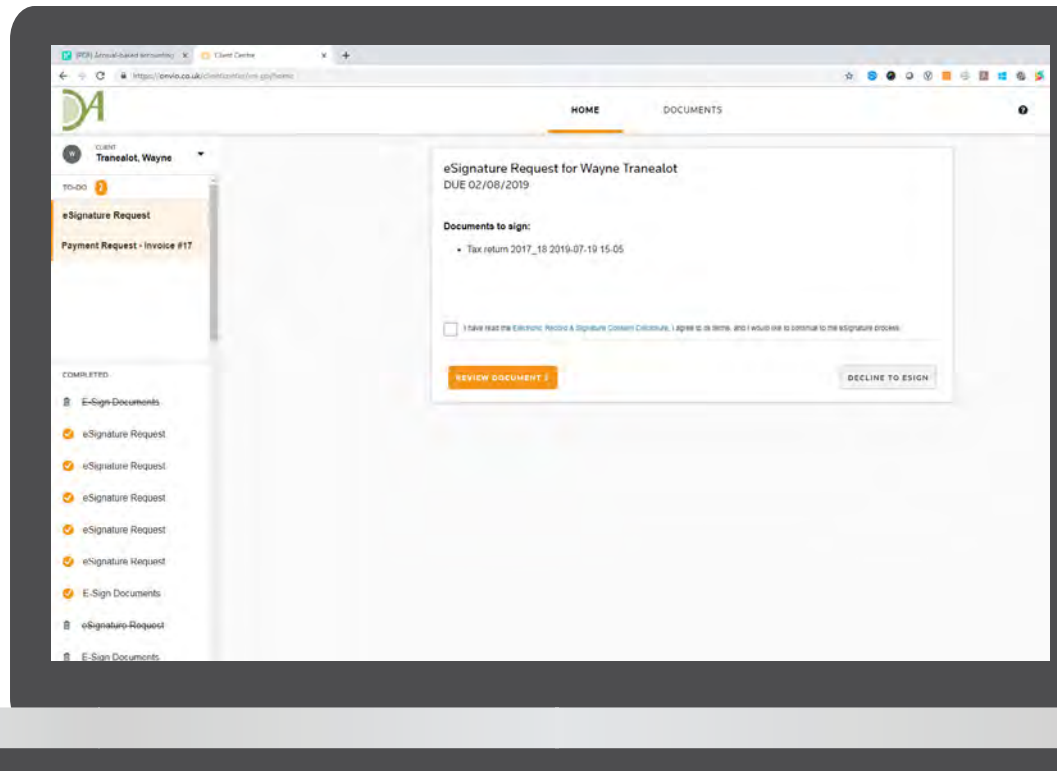
As part of Onvio Firm Management, Client Centre gives you the latest in virtual client and staff collaboration. Think of the secure online portal as the hub for communication between your staff and clients. And because it's optimised for tablet and web, your clients can work with you anywhere they happen to be.

Since Onvio works with Dropbox, Google Drive, and other popular document-sharing solutions, it's easy for your clients to exchange documents and collaborate on edits with your staff. You can even "assign" your clients tasks that require their action, such as uploading necessary documents or completing e-signatures.



Client Centre home page: make it your own

Brand your firm's client collaboration tool to help extend your brand to every online interaction with your clients.



Client collaboration features also make life easier for your staff, thanks to:

- Fast and easy drag, drop, scan, and selection of documents
- The ability to customise and fine-tune the messaging your client sees
- A simple and intuitive client-side view of the documents they upload and receive from your firm
- The ability for clients to easily and securely share documents with third parties
- An easy file exchange process for both your staff and your clients
- The ability for clients to easily pay online
- Inbuilt e-signing shortening your approval process and reducing the risk of emailing sensitive information

Learn more about Onvio Firm Management: Client Collaboration at:
tax.thomsonreuters.co.uk/onvio/firm-management

Thomson Reuters Onvio Firm Management: Project Management

Never miss another deadline

The holistic design of Onvio allows you to manage projects without missing a beat. Unlike many ad hoc systems, Onvio helps you manage all of the information you need for a successful project, including due dates, tasks, reporting, and more. Because Onvio is a centralised, cloud-based platform project management seamlessly integrates with the rest of Onvio.

Project Management ensures your team is working towards one goal, thanks to:

- Due date tracking
- Task tracking
- Create ad-hoc tasks for reminders. Your ToDo list is automatically sorted by importance and date. Efficiently filter and search Projects and Tasks to see what's most important.





What you get with Onvio Firm Management

From client portals to document management, Onvio has an integrated solution designed just for you. The flexibility of Onvio means that as your needs and your clients' needs change, Onvio can grow with you. Here's a quick overview of what you get with each version of Onvio Firm Management.

	Firm Management Essentials
Projects and Project Management	
Allocate projects and tasks to staff	✓
Track due dates	✓
Set recurrence frequency of projects	✓
Quickly filter and report on project status	✓
Set due dates	✓
Task level tracking	✓
Assign tasks for clients to complete	✓
Automatically mark next task ready	✓
Share notes and comments with staff	✓
Ad-hoc reminders for self and others	✓
Client-facing tasks	✓
Documents	
Automatic folder creation	✓
Easy to navigate folder structure	✓
Share folders with clients for collaboration	✓
E-sign multiple signatures	✓
Merge and manipulate PDFs	✓
Client Centre	
Assign requests and approvals	✓
APP notifications	✓
Low risk way of sharing files	✓
Clients upload essential information	✓
Clients can send secure links to contacts	✓
Security	
Multi-factor authentication - Staff & clients	✓
Permission groups	✓
Documents encrypted at rest	✓



**Take a look at all
the shades of Onvio.**

If you haven't had a chance to view our introductory Onvio video with more information about the products of Thomson Reuters Onvio, we invite you to visit our website now and check it out.

tax.thomsonreuters.co.uk/onvio



Training, consulting and implementation

Make the most of your software investment and maximise firm productivity

Whether you're new to Onvio or have experience using it, our dedicated team of experts are on hand to ensure your practice runs efficiently, maximising productivity and a faster return on your investment.

We're here to provide you with the knowledge and tools you need for one or all the six typical phases of a successful product implementation.

- 1. Analyse business workflow** - Our consultants will evaluate your current workflow and analyse where additional efficiencies can be gained throughout your Onvio implementation.
- 2. Documentation of workflow** - Documentation of your firm's process is key. Throughout your Onvio implementation, our consultants will guide through best practice techniques, highlighting the role Onvio will play moving forward.
- 3. Conversion of client data** - Our professional services team will work with you and your staff to ensure your data is converted safely and accurately from your current software provider.
- 4. Configuration** - Our consultants will ensure that Onvio is configured in a way to improve and suit your firm's processes.
- 5. Training** - Our dedicated training team will work with you to produce a training plan for your firm, delivering the right training to the right staff.
- 6. Transition** - Our team of experts will be on hand to support you as you begin using Onvio. We can work with you remotely, on-site as well as provide recorded content to ensure your firm maximises the full potential of Onvio in the shortest time possible.

We can work with you remotely or on-site to achieve your goals, as well as provide recorded content that can help you meet your timetable.

For more information on training or consulting services, call **03450 180 907**.

Discover Onvio

Learn more. Experiment more. Achieve more.

See all the ways Onvio can move your firm forward to a connected and profitable future.



Visit tax.thomsonreuters.co.uk/onvio or call **03450 180 907**.



Solutions
you can **trust.**

Thomson Reuters®

Thomson Reuters is a leading provider of business information services. Our products include highly specialized information-enabled software and tools for legal, tax, accounting, and compliance professionals combined with the world's most global news service – Reuters. For more information on Thomson Reuters, visit tr.com and for the latest world news, reuters.com.

For more information, tax.thomsonreuters.co.uk.

Contact us today: 03450 180 907

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