



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	✓