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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 firm into a future where there are no limits.

ONward + VisIOn = ONVIO
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.

Protecting your data

Thomson Reuters Onvio implemented in Amazon Web Services provides a flexible, reliable, scalable, and secure cloud computing environment with among the highest quality global network performance available. Spanning 21 geographic regions around the world, use of AWS cloud technology ensures redundancy and availability. See more on the AWS Global Infrastructure here: https://aws.amazon.com/about-aws/global-infrastructure/

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.

Tailor Onvio to your firm’s work style

The platform approach of Thomson Reuters Onvio means that with Onvio powering your firm, you can create, modify, and share documents, track time and billing, and stay synchronized with colleagues and clients on a single, universally accessible platform.

Work securely 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.

This means secure, seamless connectivity across your organization and with your clients using multi-factor authentication and other security protocols.

Share data seamlessly. The heart of Onvio is its intelligent workflow. Whether you’re importing client documents, recording employee time, 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 syncing 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

Collaborative tools and anywhere/anytime access to information is critical in today’s digital environment. Clients expect the firms they do business with to provide them with an efficient and secure way to collaborate and exchange information.

Keep your firm and client data safe with enterprise-level security and multiple levels of protection. 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 CS 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:

- 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
- Customize your folder structure to fit your workflow
- Manage clients and staff from a single user-friendly administration module
- Rest easy knowing your data is 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.
Thomson Reuters Onvio Firm Management: Client Collaboration

True client and staff collaboration

As part of Onvio Firm Management, Client Center 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 optimized 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 upload and exchange documents with your staff. You can even “assign” your clients tasks that require their action throughout your project workflow, such as uploading necessary documents or completing e-signatures*.

*Additional fees or licenses may be required.
Onvio Firm Management has two mobile apps available for your staff and clients. These apps, Onvio Documents and Onvio Client Center, 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
- Clients can complete tasks like completing UltraTax CS tax questionnaires, paying invoices (powered by Stripe), and completing document requests

Learn more about Onvio Firm Management at: tax.tr.com/onvio/firm-management.

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 Center apps.

Mobile apps are available on the Apple App Store and Google Play Store.
Client Center 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 customize 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*

The integration with UltraTax CS offers even more functionality, including access to a set of online tax questionnaires to send your clients and the ability to request their e-signatures on documents.

Learn more about Onvio Firm Management: Client Collaboration at tax.tr.com/onvio/firm-management.

*Additional fees or licenses may be required.
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, budgeting, reporting, and more. Because Onvio is a centralized, cloud-based platform, Project Management seamlessly integrates with the rest of Onvio and UltraTax CS.

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

- Due date tracking
- Task tracking for staff and clients
- Project budgeting tools
- Realization rate tracking (year-over-year) to see what’s profitable and what’s not
Thomson Reuters Onvio Firm Management: Time and Billing

Keep your firm at peak efficiency
The centralized database and real-time synchronization of Onvio ensure that you and your staff are always on the same page when it comes to time and billing. Fast setup and an intuitive interface make it easy to enter time and expenses, create invoices, track receipts, and report on your firm.

Easy time and expense tracking
• Choose from two input screen views: form-based with onscreen reporting of time and expenses entered, or grid-style entry with a traditional timesheet view of work completed
• Review time and expense entries in a centralized screen and export to Microsoft® Excel for analysis
• Use one or more timers to capture time as it happens anywhere in Onvio

Flexible, customized billing
• View WIP amounts available to bill — subtotaled by project, engagement, or at the client level — and export to Excel for analysis
• Create multiple invoice formats that can default to the client and be selected upon creation
• Review time and receivables with on-screen reporting by day, week, month, or custom date range
• Automatically import invoices from UltraTax CS for receivable tracking

Receipt and adjustment tracking
• Enter receipts and apply them to outstanding balances
• Enter different adjustment types, including credit memo, debit memo, and write-offs
• Send statements to clients showing the status of their accounts
• Enable bill pay for clients online or with credit cards in person

Reporting
• Access the data you need to make impactful business decisions to move your firm forward with firm management reports on productivity, collection aging, project status, and more

Learn more about Onvio Firm Management: Time and Billing at tax.tr.com/onvio/firm-management.

Complete flexibility to bill what you want, when you want.
UltraTax CS® integration with Onvio Firm Management

Direct integration between UltraTax CS and Onvio Firm Management can significantly increase firm workflow efficiencies and allow your team to easily update information directly from within the tax application.

With multiple options for automatically populating information across platforms, sharing, gathering, and viewing information with your clients through secure portals, and syncing data between programs, there is little chance of anything falling through the cracks in your busiest time.

With UltraTax CS integration, you will have the ability to:

- Quickly populate clients and contacts, enable client center and send registration emails, create Onvio projects, and request documents from your clients en masse or one by one as necessary
- View and update the current status of a Project and its associated Tasks
- Send invoices generated within UltraTax to Onvio Firm Management Time and Billing
- Send a Tax Questionnaire to your clients via Client Center for them to complete, upload documents, and send back to the firm
- Print your clients’ returns to Onvio Firm Management Document Management and share the return automatically with your clients in Client Center
- Send eSignatures to Client Center for a secure method of signing all applicable tax documentation for tax return completion*
- Be able to view client documents that are stored within Onvio Firm Management from within UltraTax CS
- Keep client information consistent and up to date between platforms via data sharing of client demographic data

*Additional cost
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.

<table>
<thead>
<tr>
<th>Onvio Firm Management</th>
<th>Essentials</th>
<th>Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shared Features</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home page and client dashboard</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Client notifications</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Reporting</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Web-based</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Custom client fields</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Firm dashboard</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td><strong>Project Management</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Due date tracking</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Project tasks</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Target and actual dates (received, start, complete)</td>
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<td>✔</td>
</tr>
<tr>
<td>Project budgeting</td>
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<td>✔</td>
</tr>
<tr>
<td>Integration with UltraTax CS</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td><strong>Document Management</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Basic document storage</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>My documents</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Full-text search</td>
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</tr>
<tr>
<td>Request feature</td>
<td>✔</td>
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<tr>
<td>Mobile app</td>
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<td>✔</td>
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<tr>
<td>Third-party integration</td>
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</tr>
<tr>
<td>Drag and drop</td>
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<td>✔</td>
</tr>
<tr>
<td><strong>Time and Billing</strong></td>
<td></td>
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<tr>
<td>Invoice and statement format wizard</td>
<td>✔</td>
<td>✔</td>
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<tr>
<td>Suite-wide timer</td>
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<td>✔</td>
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<tr>
<td>Late fees and statements</td>
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<tr>
<td>Billing groups</td>
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<tr>
<td>Approval and posting process</td>
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<tr>
<td><strong>Client Collaboration</strong></td>
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<td>Client Center</td>
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<td>Client Center mobile app</td>
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<td>✔</td>
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<tr>
<td>Tax questionnaire (integrated with UltraTax CS)</td>
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<td>✔</td>
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<tr>
<td>E-signature*</td>
<td>✔</td>
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<tr>
<td>Online bill pay*</td>
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<td>✔</td>
</tr>
<tr>
<td>Client tasks (document, review, and approval requests)</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Share documents</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

*Additional fees or licenses may be required.
Onward.  
Upward.  Forward.

Find more reasons to embrace the cloud in our white paper, *Keep Connected to Your Clients with the Cloud*.

To read the white paper, visit [tax.tr.com/onvio/go-cloud](http://tax.tr.com/onvio/go-cloud).
Take a look at the future 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.tr.com/onvio
What’s the buzz?

“Our firm’s productivity has improved by using Onvio Firm Management because we now are able to collaborate better with our clients and gather information from them.”
- Jamie Lopiccolo, CPA

“The mobile ability of Onvio is huge. When we’re traveling, we can access whatever our clients need on the spot, wherever we are. It’s important to have a document management system that works in the time you need it.”
- Shayna Chapman, CPA, CITP

“In addition to the tighter integration, the most relevant feature in [Onvio Firm Management] is the ability to search, filter, find, and move documents in and out of the system — much easier than ever before.”
- Ryan McCowan, CPA, CITP

“Hands down, my favorite thing about Onvio Firm Management is its accessibility anywhere. The fact that all of our documents are not only encrypted and safe, but accessible anywhere I can get internet access.”
- Ryan Conn, CPA
Training, consulting, and implementation

Make the most of your software investment and maximize firm productivity

When you’re ready to implement Onvio — or later, once you’ve been using the Onvio products for a while — our consultants can guide you through the steps to a more efficient workflow and a faster realization of return on your investment.

We’re ready to provide you with the tools you need during one or all of the five typical phases of a product implementation.

1. **Analyze business workflow.** We’ll evaluate your current workflow and analyze where additional efficiencies can be gained through Onvio implementation.

2. **Conversion/migration.** We’ll work with you and your staff to make sure your data is converted safely and accurately from your current software to Onvio.

3. **Setup.** We’ll help you make sure Onvio is set up in a way that makes the most sense for your firm.

4. **Training.** We’ll provide a robust learning plan for your firm, delivering the right training to the right staff.

5. **Transition into daily use.** We’ll be there to answer questions as you begin using the software on a daily basis.

We can work with you remotely or on-site to achieve your goals. Our implementation packages include live and e-learning content for a flexible training plan.

For more information on training or consulting services, call +1 800 968 8900.
Discover Onvio

Learn more. Experiment more. Achieve more.

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

Thomson Reuters®

Thomson Reuters is the world's leading source of news and information for professional markets. Our customers rely on us to deliver the intelligence, technology, and expertise they need to find trusted answers. The business has operated in more than 100 countries for more than 100 years. Thomson Reuters shares are listed on the Toronto and New York Stock Exchanges (symbol: TRI).

For more information, visit tr.com.

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