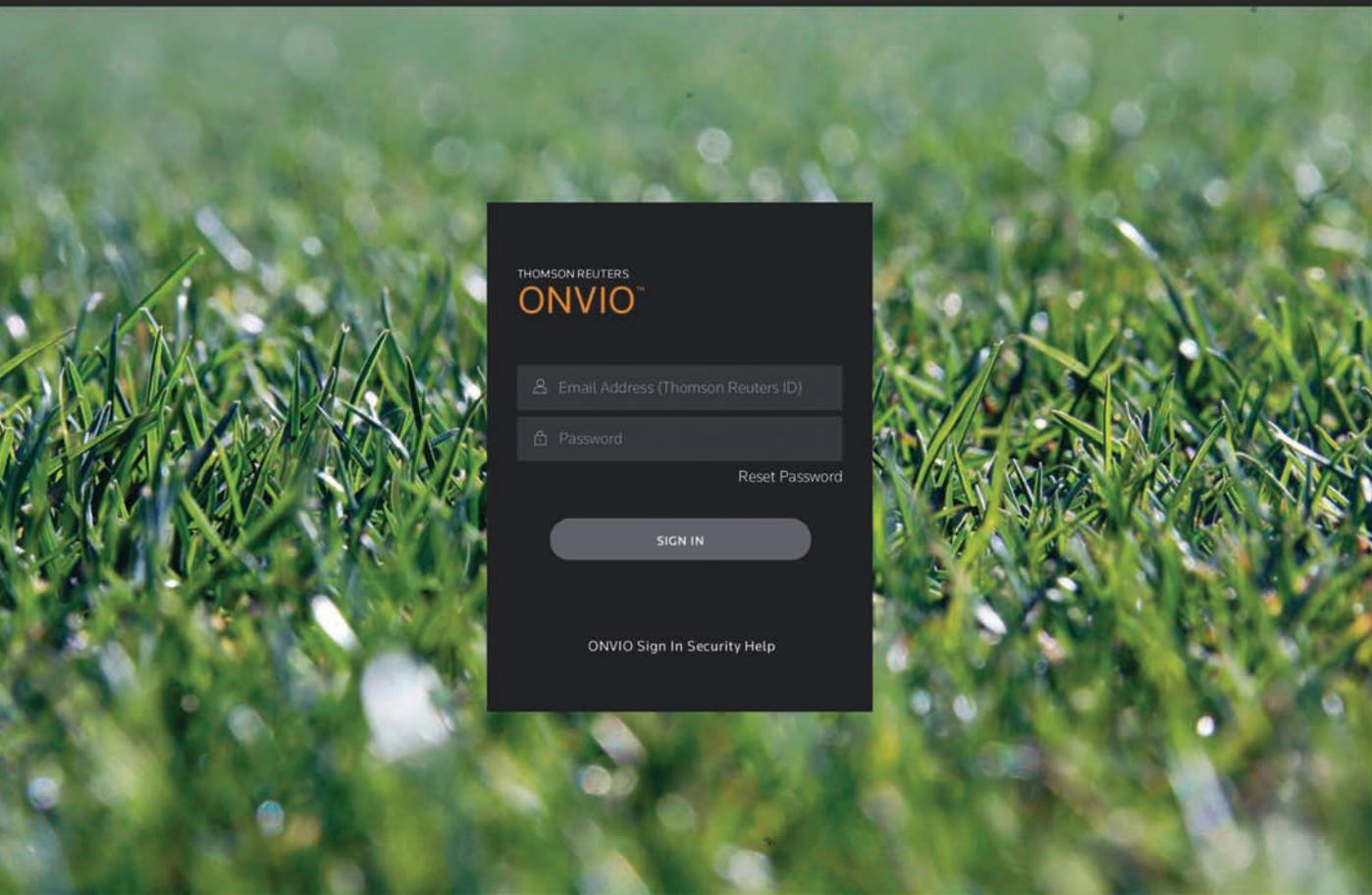




Colleagues. Clients.
Connected.



THOMSON REUTERS
ONVIO™

Email Address (Thomson Reuters ID)

Password

[Reset Password](#)

SIGN IN

[ONVIO Sign In Security Help](#)

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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

A person wearing a white long-sleeved shirt is sitting at a desk, holding a black smartphone with both hands. The person's left hand is positioned over the right hand, which is holding the phone. In the foreground, a silver laptop is open, showing its keyboard. The background is a bright, out-of-focus office space with large windows and a wooden railing. An orange circle is overlaid in the upper right corner of the image.

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.

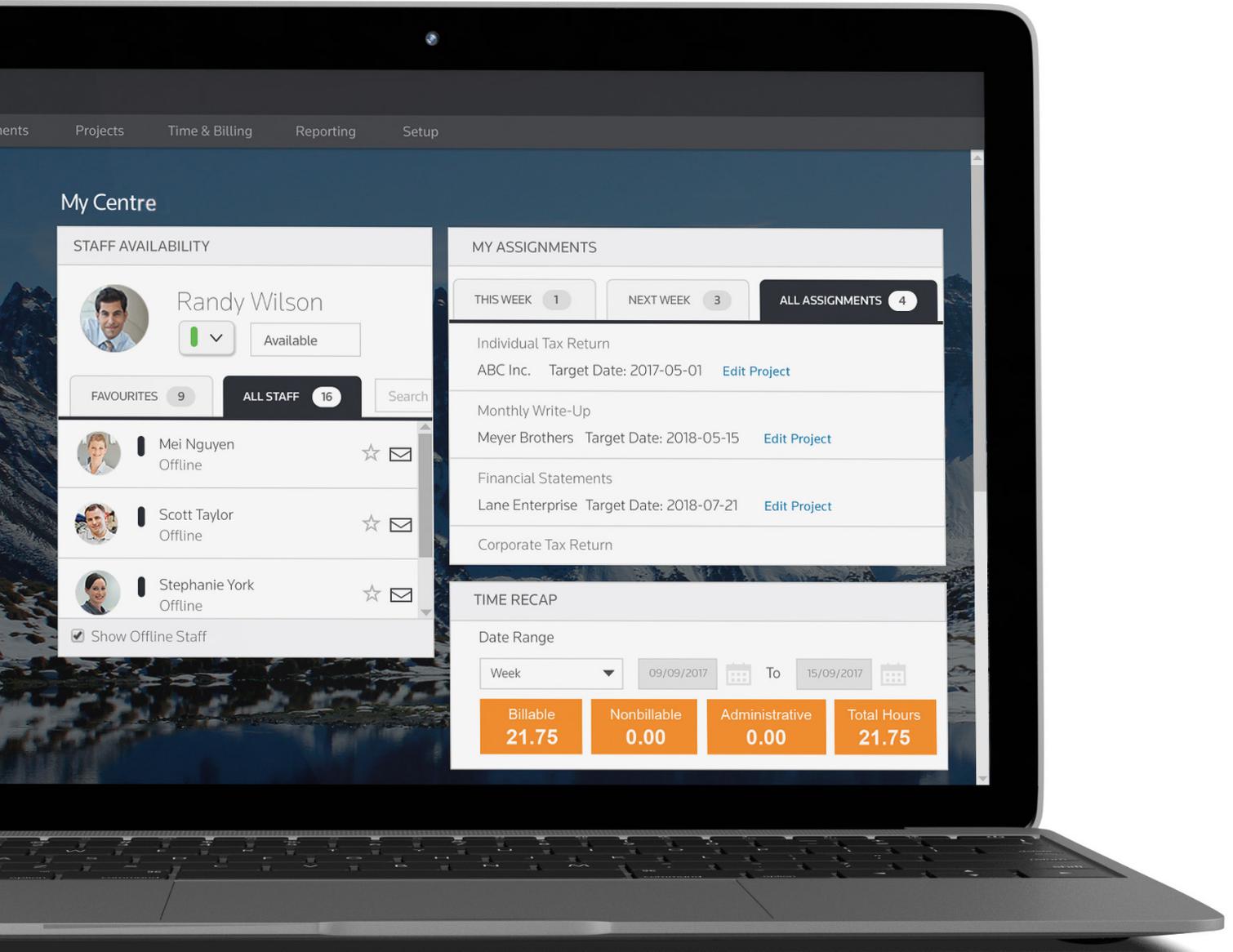
A suite of innovative cloud-based products for tax and accounting professionals, Onvio brings everything you do together into one online platform, so your team can work together with the speed, flexibility, and information you need to keep pace in a fast-changing profession.

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

Onvio is backed by the expertise of Thomson Reuters, which has been serving practitioners with online applications for decades. Because the security of your data is a top priority, our strategic data centre facilities feature security and technology best practices, redundant power sources, and security parameters designed to protect sensitive data. So say goodbye to IT headaches, and enjoy the peace of mind that comes from knowing your data is secure and operations can continue.

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.



My Centre

STAFF AVAILABILITY



Randy Wilson



Available

FAVOURITES 9

ALL STAFF 16

Search



Mei Nguyen
Offline



Scott Taylor
Offline



Stephanie York
Offline



Show Offline Staff

MY ASSIGNMENTS

THIS WEEK 1

NEXT WEEK 3

ALL ASSIGNMENTS 4

Individual Tax Return

ABC Inc. Target Date: 2017-05-01 [Edit Project](#)

Monthly Write-Up

Meyer Brothers Target Date: 2018-05-15 [Edit Project](#)

Financial Statements

Lane Enterprise Target Date: 2018-07-21 [Edit Project](#)

Corporate Tax Return

TIME RECAP

Date Range

Week

09/09/2017



To

15/09/2017



Billable

21.75

Nonbillable

0.00

Administrative

0.00

Total Hours

21.75

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 time and billing, and stay synchronized 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 organization and with your clients.

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 clients, contacts, and staff information to time sheets 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 DT 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 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 app

**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:
thomsonreuters.ca/en/onvio.

Thomson Reuters Onvio Firm Management: Client Collaboration

True client and staff collaboration

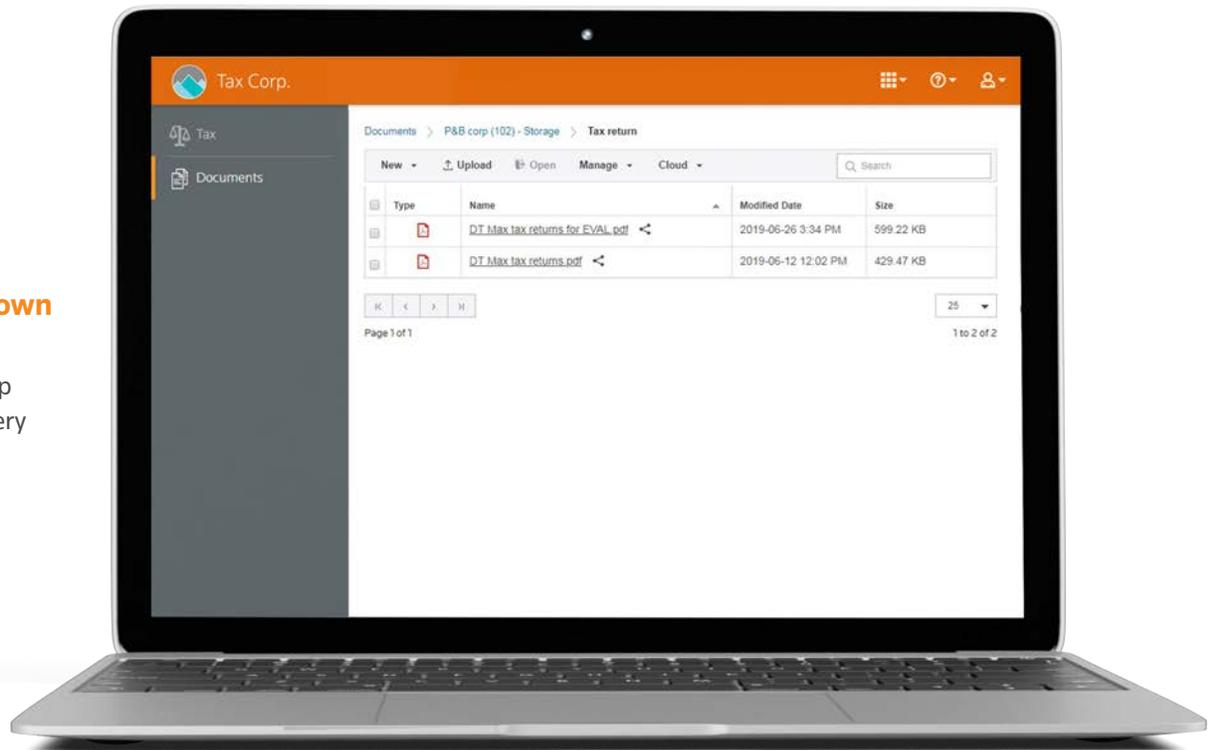
As part of Onvio Firm Management, Client Centre gives you the latest in virtual client and staff collaboration. Think of the secure online portal as the hub for communication between your staff and clients. And because it's optimized for tablet and Web, your clients can work with you anywhere they happen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

Since Onvio works with Dropbox, Google Drive, and other popular document-sharing solutions, it's easy for your clients to 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 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 DT Max also gives you access to a set of online tax questionnaires that guide your clients to a list of source documents they need to upload. It's an easy way for clients to provide you with updated information from any device, at their convenience.

Learn more about Onvio Firm Management: Client Collaboration at thomsonreuters.ca/en/onvio.

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

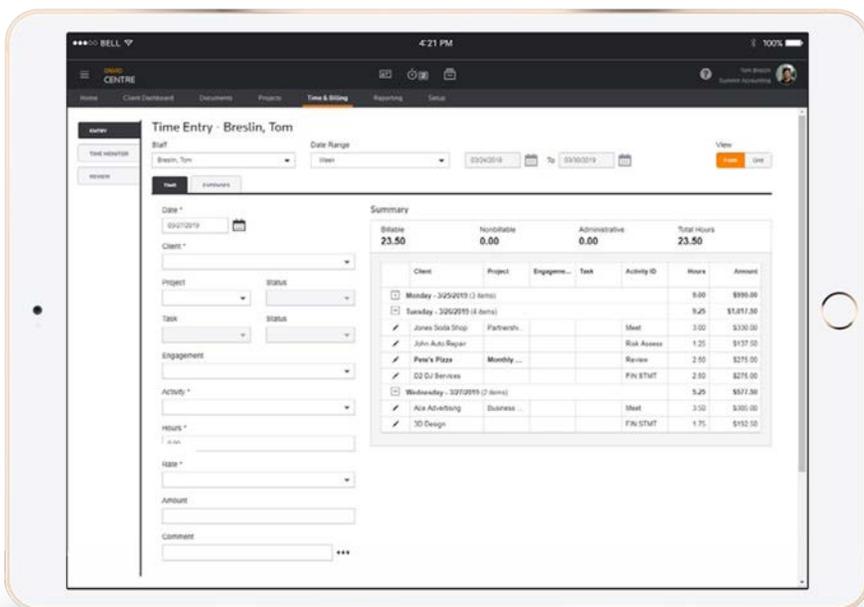
Receipt and Adjustment Tracking

- 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 thomsonreuters.ca/en/onvio.



Complete flexibility to bill what you want, when you want.

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.

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

- Due date tracking
- Task tracking
- Project budgeting tools
- Realization rate tracking (year-over-year) to see what's profitable and what's not

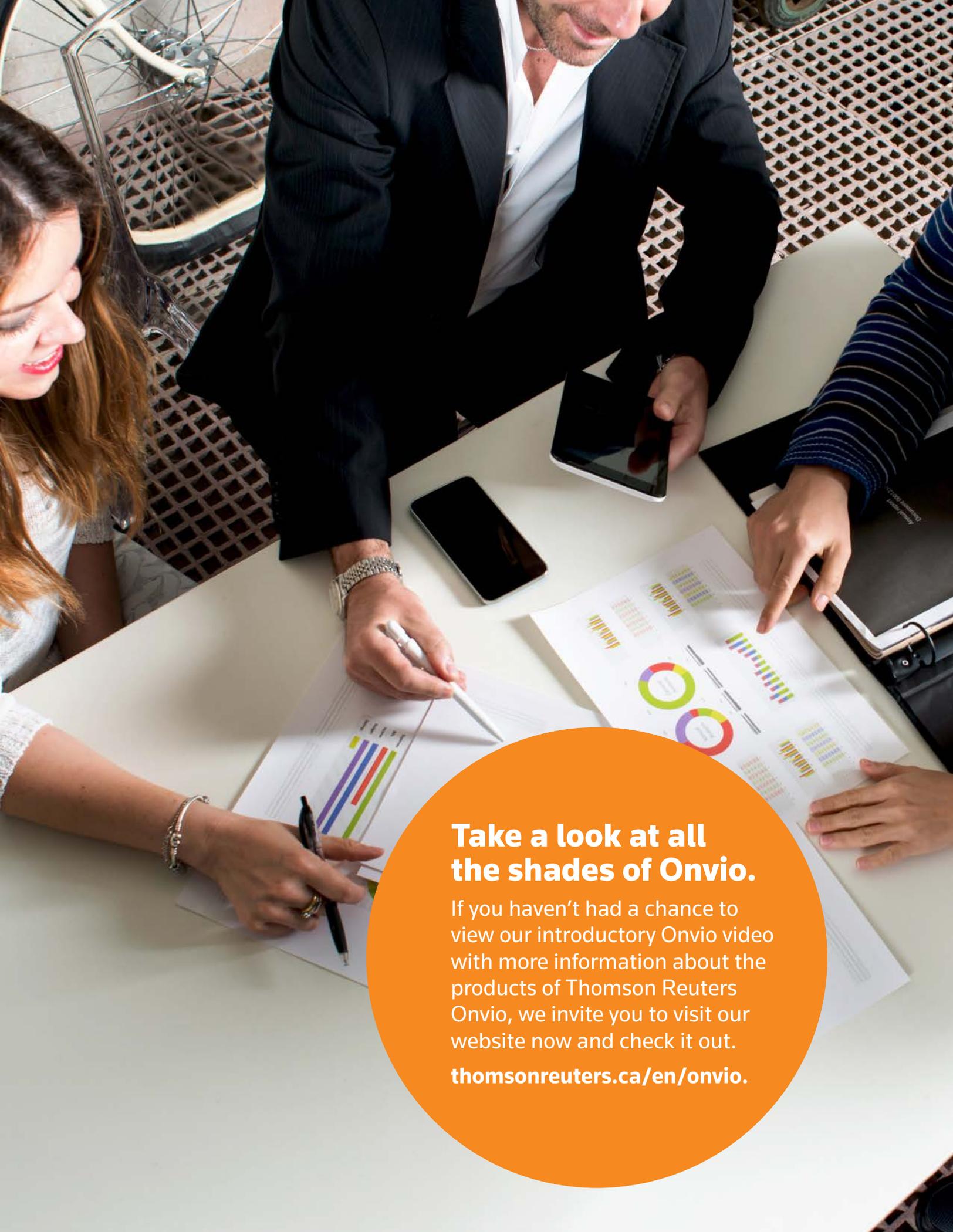




What you get with Onvio Firm Management

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.

Onvio Firm Management	Essentials	Advanced
Shared Features		
Home page and client dashboard	✓	✓
Client notifications	✓	✓
Reporting	✓	✓
Web based	✓	✓
Project Management		
Due date tracking	✓	✓
Project tasks		✓
Target and actual dates (received, start, complete)		✓
Project budgeting		✓
Document Management		
Basic document storage	✓	✓
My documents	✓	✓
Full text search	✓	✓
Request feature	✓	✓
Mobile app	✓	✓
Third-party integration	✓	✓
Drag and drop	✓	✓
Time and Billing		
Invoice and statement format wizard	✓	✓
Suite-wide timer	✓	✓
Online bill pay	✓	✓
Late fees and statements	✓	✓
Approval and posting process	✓	✓
Client Collaboration		
Client Centre	✓	✓
Client Centre mobile app	✓	✓
Tax questionnaire (integrated with DT Max)	✓	✓
E-signature	✓	✓



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.

thomsonreuters.ca/en/onvio.

What's the Buzz?



It's my first year using Onvio and I'm already saving a lot of time and money. With over a thousand clients using our pickup and delivery service, Onvio reduces much of the legwork in having to pick up clients' slips and eliminates the delays in delivering the tax returns.

Onvio is a great tool – our clients see us as a shining star!

Thomas Joseph

*TJ Tax
Brossard, Quebec*



The mobile ability of Onvio is huge. When we're travelling, 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 C

*CPA.CITP,
Owner of Shaynaco LLC*



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 six 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. **Documentation of workflow.** Documenting your firm's process is key. Throughout Onvio implementation, we'll document your workflow, highlighting the role Onvio will play.
3. **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.
4. **Setup.** We'll help you make sure Onvio is set up in a way that makes the most sense for your firm.
5. **Training.** We'll help you configure an efficient training plan for your entire firm, delivering the right training to the right staff.
6. **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, as well as provide recorded content that can help you meet your timetable.

For more information on training or consulting services, call 1 866 653-8629.

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 thomsonreuters.ca/en/onvio, call 1 866 653-8629, or email us at dt.sales@tr.com.





Solutions
you can **trust.**

Thomson Reuters®

Thomson Reuters is the world's leading source of news and information for professional markets, serving 3 different industries: News & Media, Legal and Tax & Accounting. Thomson Reuters Tax and Accounting delivers innovative, integrated software and knowledge solutions to tax professionals around the world. We provide integrated tax compliance and accounting information, software and services for professionals. Our Tax and Accounting business serves CFOs; CPAs; tax & accounting firms; educational institutions; and more.

For more information, thomsonreuters.ca/en/dtpro.

Contact us today: 1 866 653-8629
dt.sales@tr.com

Visit thomsonreuters.ca/en/onvio

