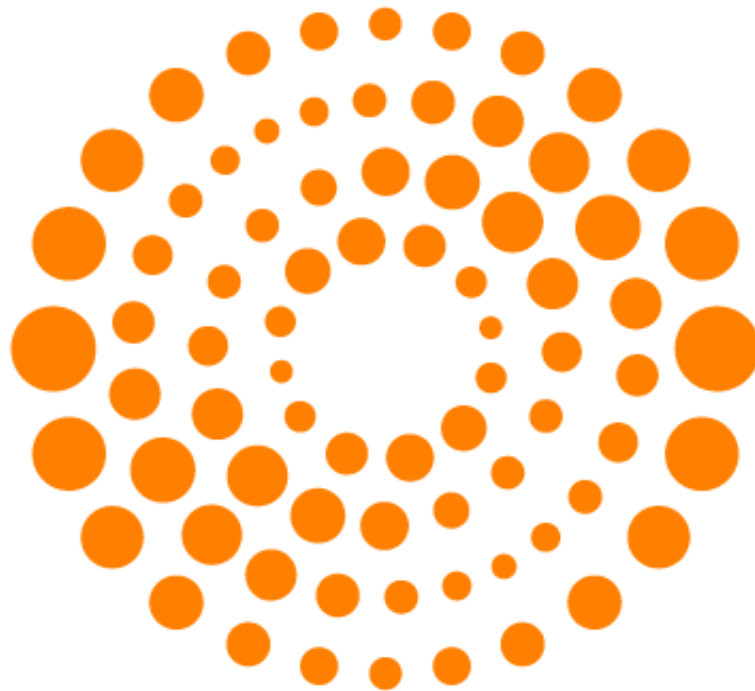


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**THOMSON
REUTERS**

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used as part of the firm management suite, Onvio Documents is not offered as a stand-alone document management application. Onvio Documents includes easy integration with CS Professional Suite applications including UltraTax CS.

Cloud-based for easy online access, Onvio Documents also includes a free mobile app for both iOS and Android devices, with users able to access all features directly from the mobile app, including the ability to snap a photo of a document and later enhance the photo using the tools provided in the app. Stored documents can also be accessed using the mobile app, with users able to scan and upload documents from mobile devices directly to the application.

Onvio Documents includes an intuitive user interface that remains consistent across all applications. The application supports multiple file formats including audio and image files. An open file structure is supported in the application, and users can create folder templates that ensure consistency across the firm as well simplify the folder creation process. Each folder template can also have an unlimited number of sub-folders which can be added to the template or used at the client level. All documents are automatically organized by category, with tabs for each category which include All Documents, Client Documents, which is where shareable documents as well as other Onvio documents are stored, Firm Documents, which stores documents specific to the firm, My Documents, which are documents that can only be accessed by the user, along with a Recent Activity tab and a Recycle Bin tab that can be used to discard documents.

Onvio Documents works with any Twain or WIA supported scanner, allowing users to easily scan documents into the application. Users can scan multiple documents and OCR technology provides good search capability. Documents can also be dragged and dropped directly into the application from the desktop or added into the application from a variety of third-party document storage applications including Box, Dropbox, or Google Drive.

Users can review any client folder to ensure that all requested documents are in the

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The application includes folder-sharing roles, allowing users to assign roles and specific permissions to anyone accessing a folder. Users can also add a list of people authorized to view the specified files. Authorized users can also edit any file that they access, with options to save both a new version of the file along with the old version, or save the new file over the existing version.

Onvio's Client Center serves as a portal, allowing firms and clients to securely share documents. The client center can be embedded directly on a firm's website, and firm management has complete control over which clients will have access to the Client Center. The client center offers bi-directional capability, making it easy for firms and clients to exchange documents. Both custom branding and messaging can be added to the portal, and users can add a Stripe account, which provides clients with an easy way to pay invoices.

Onvio Firm Management which includes Onvio Documents, offers seamless integration with UltraTax CS for easy source document management. In addition, the application also integrates with Stripe for payment acceptance as well as QuickBooks Online.

The Help and How-To Center offers users access to a searchable knowledge base, where instructional articles and product videos can be accessed. In addition, users can access the Getting Started instructions that are included for all Thomson Reuters application. Product support is available during extended business hours, with telephone, email, and chat support available.

Onvio Documents is offered as part of Onvio Firm Management. Suitable for firms of all sizes, time and billing and a client center portal is also included with the application. Pricing for Onvio Firm Management is available directly from Thomson Reuters upon request.

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- Offers limited integration outside of CS Professional Suite

Firm Management

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