

DOCUMENTS FACT SHEET

SECURE DOCUMENT MANAGEMENT PLUS CLOUD COLLABORATION

As tax and accounting firms and their clients adapt to evolving business conditions, demand for collaborative tools and anywhere-anytime access to information continues to increase.

Clients' expectations are increasing, too, as a younger generation expects the firms they do business with to be technological leaders who will provide them with an efficient, effective and secure way to collaborate and exchange information.

Onvio Documents provides cloud-based document management that's as easy to use as our traditional desktop document management software—with the added power of the innovative collaboration capabilities provided by a cloud solution, and an intuitive interface that allows your staff to work easily and efficiently.

Thomson Reuters Onvio Client Centre portal functionality and linking with DT Max provides for simple user and firm administration. It allows your firm to work with your clients to collect valuable information and distribute deliverables.

With Onvio Documents, you'll be able to:

- Easily onboard new clients by importing documents from Google Drive[™], Dropbox[™] and Box
- Quickly print documents to Onvio directly from mobiles and tablets
- Find the information you need by using full-text search across a variety of documents 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 on our servers

DISCOVER ONVIO DOCUMENTS

See how Onvio Documents can help move your firm forward into a connected and profitable future.

Visit DTMax.ca/en/Onvio/Documents, or call **1 866 653-8629** to speak with a representative.



Source document scanning goes mobile

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

Functionality on the go with the Onvio Documents mobile app

Onvio Documents is also available in a convenient mobile app for you and your staff. You'll have the full functionality of the product, plus:

- 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 multi-page documents with your mobile device's camera

Because you're viewing the same information in real time—even when you're in the mobile app—it's easier than ever to assist your clients with their questions.

Thomson Reuters Onvio. *Connections that move you forward.*
DTMax.ca/en/Onvio/Documents
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