

CLIENT CENTRE FACT SHEET

TRUE CLIENT AND STAFF COLLABORATION

Onvio Client Centre works in concert with Thomson Reuters Onvio Documents to give you the latest in true client and staff collaboration.

Think of the Client Centre secure online portal as the hub for communication between your staff and clients. Because it's optimized for tablet and web, your clients can work with Client Centre anywhere they happen to be. And since Onvio works with Dropbox™, Google Drive™ and other popular document sharing solutions, it's easy for you to get any type of documents directly from your clients.

You can even give your clients and other contacts "assignments" that require their action, such as uploading necessary documents.

Onvio Client Centre also makes 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

DISCOVER ONVIO CLIENT CENTRE

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

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



Functionality on the go with the Onvio Client Centre mobile app

Onvio Client Centre is also available in a convenient mobile app for your clients. They'll have the full functionality, plus:

- Take photos of source documents with the mobile device and enhance them in the app (flip, crop, de-skew, flatten, etc.)
- Quickly scan and upload multi-page documents with the mobile device's camera

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



Source document scanning goes mobile

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