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Thomson Reuters – Onvio Documents

[Tax.ThomsonReuters.com](https://tax.thomsonreuters.com)

Onvio Documents combines the ease of use of our traditional desktop document management software with cutting edge collaboration capabilities offered by a cloud solution. As CPA 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, as a younger generation expects firms to be technological leaders who provide efficient, effective, and secure means of collaboration and information exchange. Onvio Documents provides an end-to-end, cloud-based document management solution; focusing on efficiency, ease of use, and collaboration. Integration with client portals and UltraTax allows firms to work closely with clients, collecting source documents and distributing deliverables in a seamless, efficient manner.

An intuitive interface allows staff to work efficiently in the application and provides for simple user and firm administration. Onvio Documents will lead to improved efficiency through increased collaboration possibilities among staff and with clients. The application brings exciting new features to the profession that leverage cloud computing capabilities and the mobile devices our staff and clients carry at all times.

Traditional work environments are changing and extending to wherever staff and clients want to get work done. Onvio Documents will allow firms to access documents from anywhere in the world, on any device. These efficiency and productivity gains will lead enhanced client service and improved firm profitability.

Key Features include:

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MS Word and PDF documents

- Integration with the desktop and web via drag and drop functionality allows for quick, easy document uploading
- Customizable folder structure provides flexibility
- PDF and image document preview allows for quick access to document contents
- Client Center provides client portal functionality
- Integration with UltraTax 1040 makes saving and sharing tax returns quick and easy
- Administration module makes it easy to add new clients and staff and manage your firm.

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