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iOS and Android devices. The mobile app offers the same functionality as the online application, and using the mobile app, users can snap a photo of source documents or ...

Mary Girsch-Bock • Dec. 18, 2017



Onvio Documents, from Thomson Reuters

<https://tax.thomsonreuters.com/onvio/documents/>

From the Dec. 2017 Review of Document Management & Storage Systems.

Onvio Documents is part of Thomson Reuters online software product line designed for accountants and tax professionals. Along with document management, Onvio also offers the Client Center, Time and Billing, Project Manager, Workpapers, and

Trial Balance modules. Designed for firms of any size, Onvio is a great fit for the firm

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Documents are categorized by Client Documents, Firm Documents, and My Documents, which is for personal documents. Clicking on one of the tabs will display a list of all available documents found in that category.

Onvio offers complete integration with Thomson Reuters CS Professional Suite, so users can print documents directly to Onvio Documents from those applications. Users can also use the Onvio print driver to save documents accessed from other applications. All documents stored in Onvio are also automatically scanned using optimal character recognition (OCR) that provides excellent search capability for all stored documents.

Firms can easily customize the folder structure used in Onvio Documents to better suit the needs of the firm, and the product supports multiple file formats. One of the nice features in Onvio Documents is the ability to review client folders for any source documents. If a document is missing, users can send a request for the document directly to the client from the document management interface. Onvio also tracks all requests sent, so users can see if and when a client has complied with the request, and when the document was received.

Users can add documents to Onvio using a variety of methods including directly from Dropbox, Google Drive or Box. Both Microsoft Word and Excel files can be added directly from the source, and users can also add desktop files by using the Onvio print driver. For those that prefer to scan documents, Onvio supports both TWAIN or WIA scanners, though users will have to install the TWAIN plug-in, which only works with Windows operating systems. All documents added to Onvio via scanner are automatically stored as a PDF.

For additional printing options, users can install Onvio Link, which offers the capability of printing from any locally installed applications, as well as the ability to edit and sync files that are currently stored in Onvio Documents. Again, Onvio Link

will only work with a Microsoft Windows operating system, and Internet Explorer

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provide their clients with access to the Client Center during the client setup phase, sending a registration email to clients they wish to have access. Clients then complete the registration and set up their own user name and password in order to access the Client Center. Registration allows clients to both access documents as well as upload documents. Users can also send documents to clients via email, with recipients getting a link to the document, prohibiting unauthorized access to confidential documents.

Onvio Documents users can access the Thomson Reuters Onvio Customer Center to manage their account. Here, users can also access the Help and How-To Center, which provides access to a variety of resource categories including Set Up, Customize, Documents, and others. There is also a troubleshooting category. New users can choose the structured implementation recommended by Thomson Reuters which includes data conversion, product setup, and training. Product support is provided via email and chat during regular business hours.

Ideal for accounting firms that are looking to move their entire practice onto the cloud, Onvio Documents is part of the Onvio Suite of applications, with each module priced separately. Onvio is priced by subscription, with pricing dependent on the number of users. Onvio Documents can be purchased as a stand-alone system, but the Client Center requires purchase of Onvio Documents. Support is available via email and chat and is included in the subscription price, with users able to obtain a quote directly from Thomson Reuters.

2017 Rating – 4.75 Stars

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