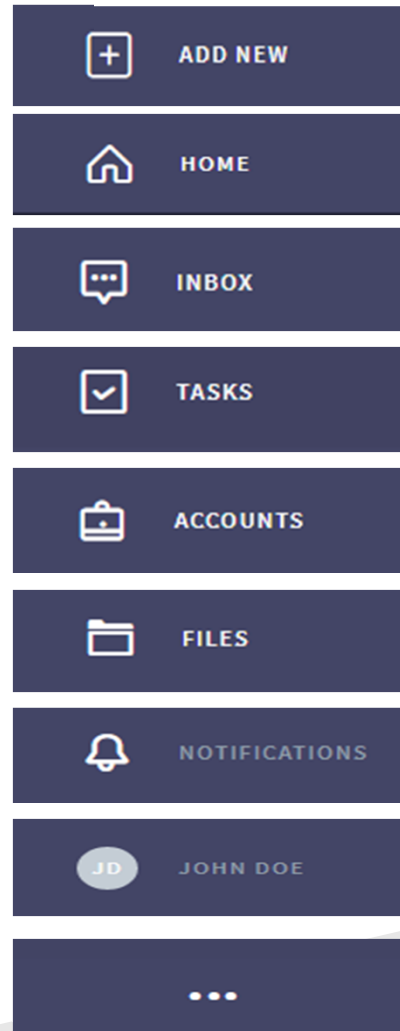
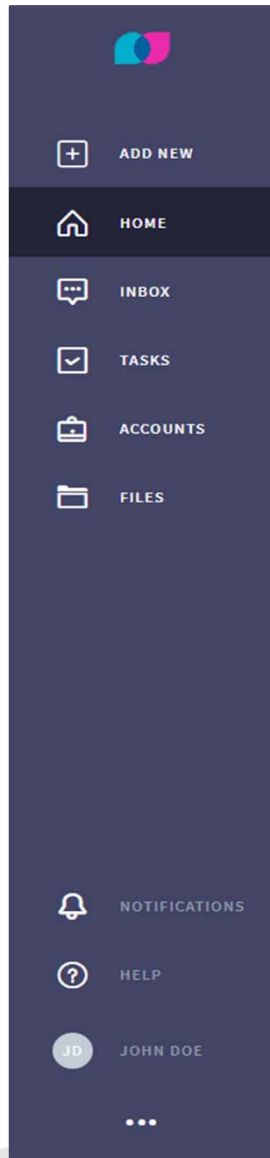




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Navigation Panel



Create a new Message or Upload a File

Dashboard view shows Inbox and My Tasks

See all messages

See all tasks: Open, Pending Review, Archived

See all accounts you have ownership on

See all files both you and the firm have uploaded

See a snapshot of all new activity

Access your account information

Log Out of Liscio



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Dashboard

- ADD NEW
- HOME
- INBOX
- TASKS
- ACCOUNTS
- CONTACTS
- BULK ACTIONS
- NOTIFICATIONS
- HELP
- JOHN DOE

DASHBOARD

Inbox | 3

JD John Doe

Account Profile Updated for Test Client
The following Account Profile item(s) have been updated for Test Client by John:

JD John Doe

me, John Doe...

My Tasks | 4

	TASK NAME	ASSIGNED TO	ACCOUNT	OWNER	DUE DATE
	Manage To Go Items Payroll Ready	John Doe	Test Client	Marinna Raucci	11/01/18
	Manage To Go Items Payroll Ready for Pickup	John Doe	Test Client	Marinna Raucci	10/21/18
	Manage To Go Items Payroll Ready for Pickup	John Doe	Test Client	Marinna Raucci	10/01/18
	Request Information Request Information From John Doe	John Doe	Test Client	Marinna Raucci	09/28/18



Inbox –
Messages between you and the firm

My Tasks –
Tasks that have been sent to you by the firm



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Completing a Task

✓ [Manage To Do Items](#)
Payroll Ready

FOR ACCOUNT: Test Client
FOR CONTACT: John Doe
TASK OWNER: Marina Raucci
DESCRIPTION: Hi John,
Your payroll has been completed and mailed via USPS Priority Mail. Attached are your payroll reports for your review. Please download and save them for your records.
Thank you

ATTACHMENTS: [Drop files to attach, or browse.](#)
Client Payroll Reports.pdf

All Activity | Comments | History

- Marinna modified the task
- Marinna modified the task
- Marinna attached file Client_Payroll_Reports.pdf

JD

✓ John, this task can be marked complete. **Mark Complete**

1. View attached documents or reports to confirm accuracy
 - a. Download Reports (see next slide for steps)
2. Add any comments to staff if needed
3. When task is ready to be completed, click Mark Complete
4. Confirm Task is complete by marking Proceed



Viewing & Downloading Attachments

Filter by ALL FILES SOURCES TAGS YEAR CONTACT

FILE NAME	TAGS
<input checked="" type="checkbox"/> signed_document.pdf by John Doe • Task	-
<input type="checkbox"/> 382152_10200227751240387_1740785794_n.pdf by Marinna Raucci • Manual	TAX
<input type="checkbox"/> JD 2018-10-14 by John Doe • Manual	-
<input type="checkbox"/> signed_document.pdf by John Doe • Task	-
<input type="checkbox"/> image1_(13).pdf by Marinna Raucci • Manual	PAYROLL

File Selected (1)

Filter by ALL FILES SOURCES TAGS YEAR CONTACT

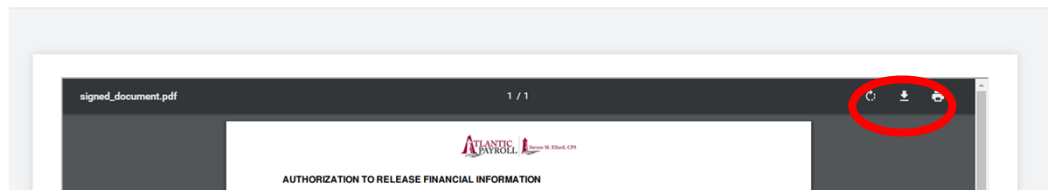
FILE NAME	TAGS
<input checked="" type="checkbox"/> signed_document.pdf by John Doe • Task	-
<input type="checkbox"/> 382152_10200227751240387_1740785794_n.pdf by Marinna Raucci • Manual	TAX
<input type="checkbox"/> JD 2018-10-14 by John Doe • Manual	-
<input type="checkbox"/> signed_document.pdf by John Doe • Task	-
<input type="checkbox"/> image1_(13).pdf by Marinna Raucci • Manual	-

File Selected (1)

From Files

1. Click the box next to the specific file you want to download
2. Click the download icon
3. Save to desired location

signed_document.pdf
Modified on Oct 14th 2018



From Document

1. Click the download icon in the upper right corner
2. Save to desired location