



Welcome to Liscio Pro

Setup & Tutorial





Welcome to secure sharing.

To set up your new account and familiarize yourself with how Liscio works, simply follow our step-by-step walkthrough.



Invite to Liscio

Welcome to Liscio Pro



Hi Lindsay,

Welcome to the new and improved version of Liscio: **Liscio Pro**. To create your new Liscio Pro account, please verify your email by copying and pasting the link below into your web browser (**DO NOT CLICK IT** — we'll explain why later).

👉 Ensure domain appears as "liscio.me" before copying & pasting.

<https://uatolympus.liscio.me/invite/bGluZHNheXJhZTE5OTRAeWFob28uY29t/aa8c4f693...01978>

Thanks for choosing Liscio Pro as your secure sharing solution! If you have any questions, please contact Olympus.

support@olympus.me
(888) 547-2500

At your service,
Olympus Team


The Invite

Step 1

Copy & paste the invite link into your browser.



The Setup

 **Liscio**

Invite to Liscio

Welcome to Olympus
Let's get your account set up!

EMAIL

PASSWORD **2**

CONFIRM PASSWORD **3**

[Next](#)

The Setup

Step 2

Create Password

Step 3

Confirm Password & Click **Next**

Getting Started

TERMS OF SERVICE

THIS ONLINE SERVICE AGREEMENT ("AGREEMENT") IS A BINDING LEGAL CONTRACT BETWEEN YOU AND LISCIO, INC. ("WE", "US" OR "LISCIO"). THIS AGREEMENT GOVERNS YOUR USE OF ANY AND ALL LISCIO SERVICES ("SERVICES" OR "LISCIO SERVICES"), INCLUDING WITHOUT LIMITATION, THE LISCIO WEBSITE, SOFTWARE APPLICATION(S), MOBILE APPLICATION(S) AND ANY OTHER MATERIALS MADE AVAILABLE BY LISCIO. BY DOWNLOADING, INSTALLING, ACCESSING OR USING THE SERVICES, YOU (A) AGREE TO BE BOUND BY THIS AGREEMENT; (B) ACKNOWLEDGE AND AGREE YOU HAVE INDEPENDENTLY EVALUATED THE DESIRABILITY OF USING THE SERVICES AND ARE NOT RELYING ON ANY REPRESENTATION, GUARANTEE, OR STATEMENT OTHER THAN AS EXPRESSLY PROVIDED IN THIS AGREEMENT; AND (C) REPRESENT YOU ARE LAWFULLY ABLE AND COMPETENT TO ENTER INTO THE TERMS, CONDITIONS, OBLIGATIONS, AFFIRMATIONS, REPRESENTATIONS, AND WARRANTIES SET FORTH IN THIS AGREEMENT AND ARE EITHER OVER OF THE LEGAL AGE OF MAJORITY IN THE JURISDICTION IN WHICH YOU RESIDE OR ARE AN EMANCIPATED MINOR, OR POSSESS LEGAL PARENTAL OR GUARDIAN CONSENT AND THAT YOU ARE FULLY ABLE AND COMPETENT TO ENTER INTO THE TERMS, CONDITIONS, OBLIGATIONS, AFFIRMATIONS, REPRESENTATIONS, AND WARRANTIES SET FORTH IN THIS AGREEMENT. IN ADDITION, IF THIS AGREEMENT IS BEING AGREED TO BY A COMPANY OR OTHER LEGAL ENTITY, THEN THE PERSON AGREEING TO THIS AGREEMENT ON BEHALF OF THAT COMPANY OR ENTITY REPRESENTS AND WARRANTS THAT HE OR SHE IS AUTHORIZED AND LAWFULLY ABLE TO BIND THAT COMPANY OR ENTITY TO THIS AGREEMENT. YOU SHOULD PRINT AND RETAIN A COPY OF THIS AGREEMENT FOR YOUR RECORDS BY USING THE PRINT FUNCTIONALITY IN YOUR BROWSER. IF YOU DO NOT AGREE TO THIS AGREEMENT YOU MAY NOT DOWNLOAD, INSTALL OR USE ANY LISCIO SOFTWARE APPLICATIONS OR SERVICES, INCLUDING THE

The Setup

Step 4

Check box to accept Terms of Service

Step 5

Click **Submit**

I have read and agree to these terms and conditions

4

Submit

5

Cancel

Home Dashboard

After accepting Terms of Service, you'll see Liscio Home Dashboard.

The screenshot displays the Liscio Home Dashboard. On the left is a dark sidebar with navigation icons for ADD NEW, HOME, INBOX, TASKS, ACCOUNTS, FILES, NOTIFICATIONS, HELP, and TOM BOMBARDI. The main content area is titled 'DASHBOARD' and is divided into two sections: 'Inbox | 3' and 'My Tasks | 0'. The 'Inbox' section contains three messages from 'Matt Woods, me...' and 'Matt Woods', with a 'Message' button in the top right. The 'My Tasks' section is currently empty, showing a table header with columns: TASK NAME, ASSIGNED TO, ACCOUNT, OWNER, DUE DATE, and LAST ACTIVITY AT. Below the header, it states 'No Records Found' and has a 'SEE ALL OPEN TASKS' link.

Inbox

Messages between you and the firm.

My Tasks

Tasks that have been sent to you by the firm.

The Navigation Panel

Located on the left side of the screen.



Home

Dashboard view shows **Inbox** and **My Tasks**.



Inbox

See all messages: received (**Inbox**), **Sent**, **Drafts**, and **Archived**.



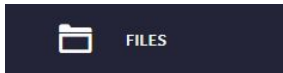
Tasks

See all tasks: **Open**, **Pending Review**, and **Archived**; filter by **Type**, **Owner**, and **Account**.



Accounts

See all accounts that you have **Account Ownership** on.



Files

See the files that you or the firm has uploaded.

The Navigation Panel

Located on the left side of the screen.



Help

Access Liscio Knowledge Base for FAQs and support resources.



User Profile

Access your account information.

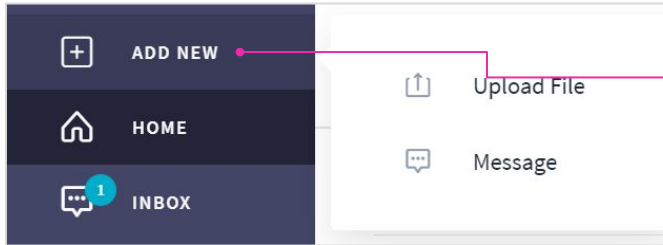


Logout

Log Out of Liscio.

The Navigation Panel

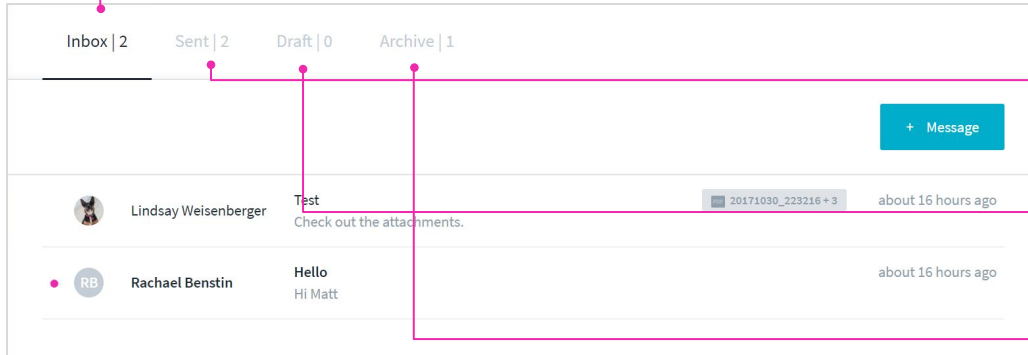
Located on the left side of the screen.



Add New

Create a new **Message** or **Upload a File**.

Inbox



Inbox

Messages you've received.

Sent

Messages you've sent.

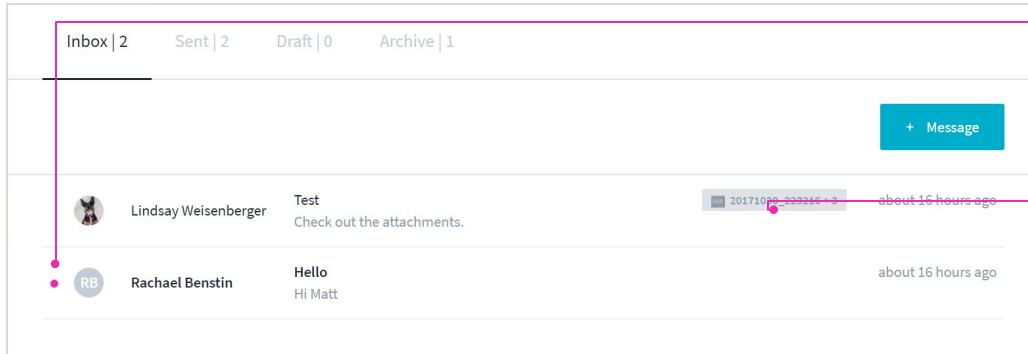
Draft

Messages in progress or saved for later use.

Archive

Messages you've archived.

Inbox



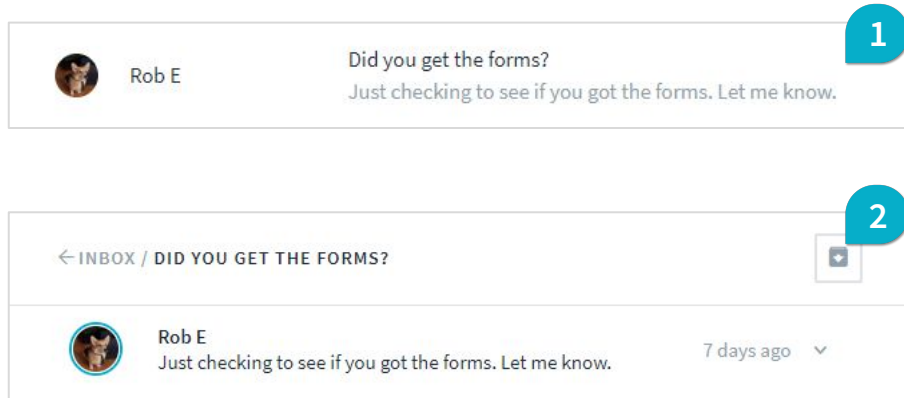
• Unread

Pink dot & bold type indicate unread message.

• Attachment

Preview attachment file names.

Inbox



Archive a Message

Step 1

Select message

Step 2

Click **Archive**

Inbox

New Message

TO

SUBJECT

DESCRIPTION

ATTACHMENTS

SEND AS Matt Woods

Send

Create a Message

Step 1

Click **+ Message**

Step 2

Click “To” field; enter Recipient & Account

Step 3

Enter Subject Line & Description

Step 4

Drag & Drop files here, or click **browse**

Step 5

Click **Send**

Tasks

Items the firm needs you to complete.

Open Tasks | 1 Pending Review | 0 Archived | 0

Filter By: **MY TASKS** | TYPE | OWNER | ACCOUNT | ASSIGNEE

TASK NAME	ASSIGNED TO	ACCOUNT	OWNER	DUE DATE ↓	LAST ACTIVITY AT ↓
Request Information Request Information From Bombadil	Tom Bombadil	Dunder Mifflin Paper Co.	Matt Woods	07/27/18	less than a minute ago

Showing 1 to 1 of 1 entries

First < 1 > Last

Open Tasks

Tasks that the firm needs you to complete.

Pending Review

Tasks awaiting your review.

Tasks

Items the firm needs you to complete.

The screenshot shows a task management interface. At the top, there are three tabs: "Open Tasks | 1", "Pending Review | 0", and "Archived | 0". Below the tabs is a "Filter By" section with buttons for "MY TASKS", "TYPE", "OWNER", "ACCOUNT", and "ASSIGNEE". The "ACCOUNT" filter is selected. Below the filters is a table with the following columns: "TASK NAME", "ASSIGNED TO", "ACCOUNT", "OWNER", "DUE DATE", and "LAST ACTIVITY AT". The table contains one entry: "Request Information From Tom Bombadil" assigned to "Tom Bombadil" at "Dunder Mifflin Paper Co." by "Matt Woods" with a due date of "07/27/18" and last activity of "less than a minute ago". There is a "Request Information" button next to the task name and a "1 NEW COMMENT" indicator below it. At the bottom, it says "Showing 1 to 1 of 1 entries" and has pagination controls for "First", "1", and "Last".

TASK NAME	ASSIGNED TO	ACCOUNT	OWNER	DUE DATE	LAST ACTIVITY AT
Request Information From Tom Bombadil	Tom Bombadil	Dunder Mifflin Paper Co.	Matt Woods	07/27/18	less than a minute ago

Archived

Completed tasks.

Sorting and Filtering Tasks

Filter by **Type**, **Owner**, and **Account**.

Accounts

All Accounts that you own.

ALL ACCOUNTS		
ACCOUNT NAME ↑	ENTITY TYPE	OPEN TASKS
Dunder Mifflin Paper Co.	C-Corporation	-

Accounts

Selecting an Account displays the Account's Details.

ALL ACCOUNTS / DUNDER MIFFLIN PAPER CO.

Overview Contacts Payroll Logins Files

CLIENT * C-CORPORATION
Dunder Mifflin Paper Co.

CLIENT SERVICE TEAM

PHONE: (129) 348 - 0293 EXTERNAL ID: 456DunMif REFERRAL SOURCE: Other

WEBSITE: dundermifflin.com FAX NUMBER: (476) 468 - 8468 ADDRESS: 198 Taiwan, San Luis Potosi, SLP, 78385, Mexico

Account Details

EIN: ***** INDUSTRY: Paper Co. # OF EMPLOYEES: -

FISCAL YEAR END: October PRIOR ACCOUNTANT: RootAdvisors

WHAT ARE YOUR BIGGEST CHALLENGES?: Working with clients/keeping up with payroll

WHAT DO YOU USE TO MAKE BUSINESS DECISIONS?: Detailed data analytics we try to maintain proper metrics with our team to make sure we are hitting

WHAT WOULD YOU LIKE MOST FROM AN ACCOUNTING FIRM?: direct communication

Overview

Click on an Account to see its demographic profile.

Contacts

All contacts associated with the Account.

Accounts

Selecting an Account displays the Account's Details.

ALL ACCOUNTS / DUNDER MIFFLIN PAPER CO.

Overview Contacts Payroll Logins Files

CLIENT * C-CORPORATION
Dunder Mifflin Paper Co.

PHONE: (129) 348 - 0293 EXTERNAL ID: 456DunMif
WEBSITE: dundermifflin.com FAX NUMBER: (476) 468 - 8468

CLIENT SERVICE TEAM
REFERRAL SOURCE: Other
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Account Details

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WHAT ARE YOUR BIGGEST CHALLENGES?: Working with clients/keeping up with payroll
WHAT DO YOU USE TO MAKE BUSINESS DECISIONS?: Detailed data analytics we try to maintain proper metrics with our team to make sure we are hitting
WHAT WOULD YOU LIKE MOST FROM AN ACCOUNTING FIRM?: direct communication

• Payroll

Payroll information for the Account.

• Logins

Account login info.

• Files

All files uploaded to the Account.

Files

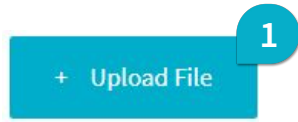
All Files that you've uploaded to Liscio.

The screenshot displays the 'FILE LIST' interface. At the top, there are filter buttons: 'ALL FILES', 'SOURCES', 'TAGS', and 'YEAR'. A blue '+ Upload File' button is located to the right. Below the filters is a table with columns: 'FILE NAME', 'TAGS', 'ACCOUNT', 'YEAR', and 'DATE ADDED ↓'. A single file is listed: '909185.pdf' by Tom Bombadil - Attachments, dated 07/11/2018. Below the table, there are icons for trash and refresh, and the text 'File Selected (0)'. At the bottom, it says 'Showing 1 to 1 of 1 entries' and has pagination buttons: 'First', '<', '1', '>', and 'Last'. A pink line connects the 'SOURCES' filter button to the 'Filter' text on the right.

Filter

You can filter by selecting one of the filter buttons above the file list.

Files



Upload File

ACCOUNT 2 YEAR 3

CONTACT

TAGS 4

FILE 5

Drop files to attach, or [browse](#).

Cancel Upload

Uploading a File

Step 1

Click the **+ Upload File** button

Step 2

Select an account that this file is for

Step 3

Select a year for the file

Step 4

Add an associated Tags

Step 5


Browse for or Drag & Drop the file you wish to Upload

We're here to help.

If you have any questions about these steps or any other Liscio function, please contact us or visit our new website and YouTube channel for more resources.

 support@liscio.me

 (888) 547-2460

 [Liscio Knowledge Base](#)

Click below for:

 [Liscio Website](#)

 [Liscio YouTube Channel](#)