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 | Liscio

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.

1

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

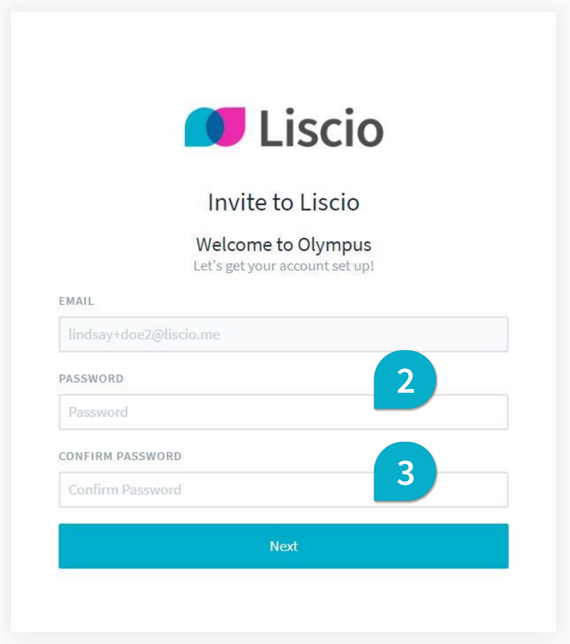
At your service,
Olympus Team

The Invite

Step 1

Copy & paste the invite link into your browser.

The Setup



The Setup

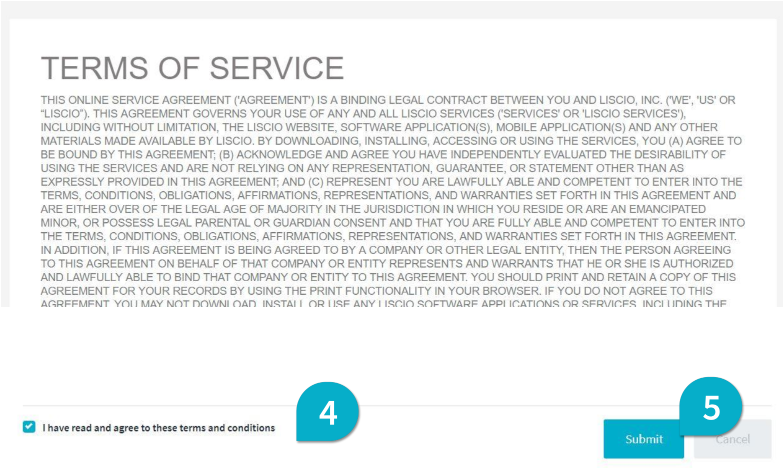
Step 2

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

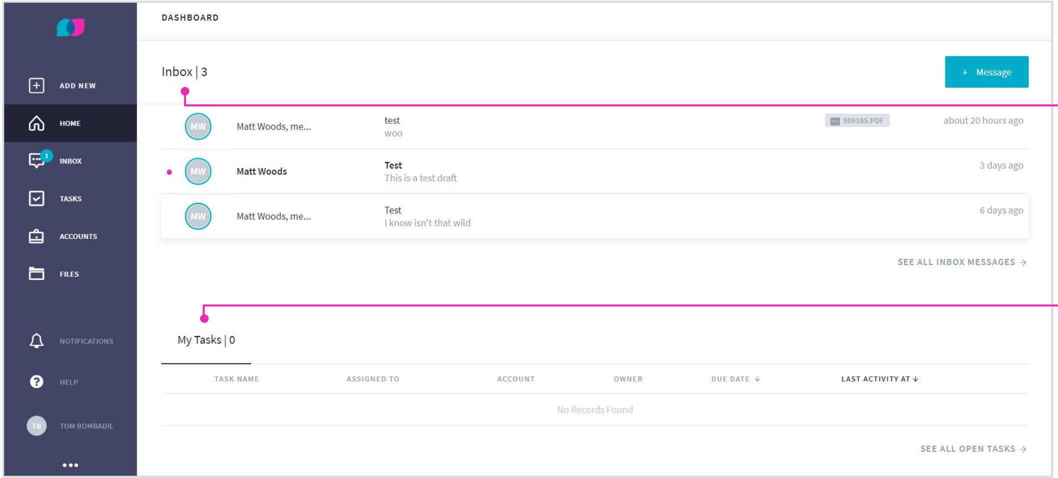
Check box to accept Terms of Service

Step 5

Click **Submit**

Home Dashboard

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



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

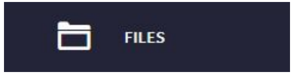
See all messages: received (**Inbox**), **Sent**, **Drafts**, and **Archived**.

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

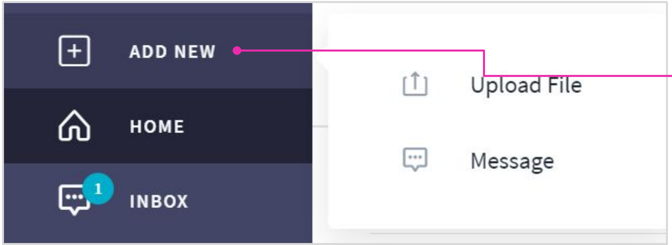
Access your account information.

Logout

Log Out of Liscio.

The Navigation Panel

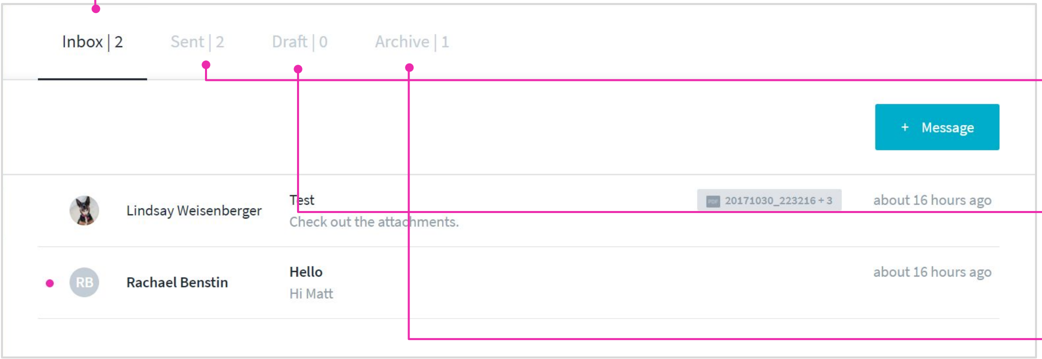
Located on the left side of the screen.



Add New

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

Inbox



Inbox

Messages you've received.

Sent

Messages you've sent.

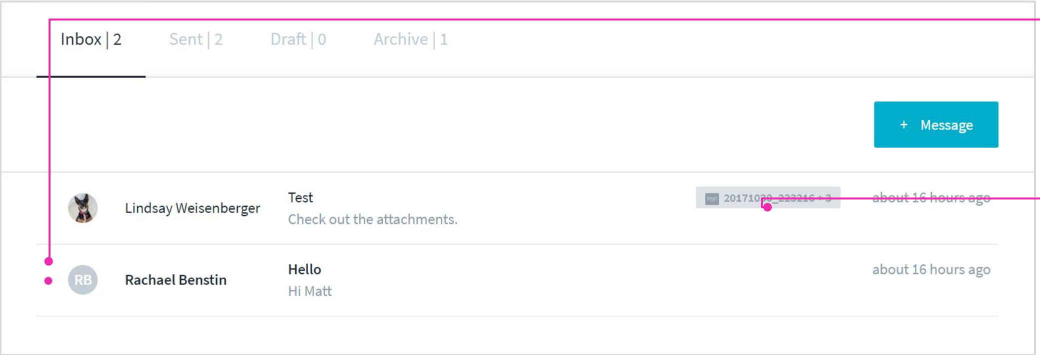
Draft

Messages in progress or saved for later use.

Archive

Messages you've archived.

Inbox



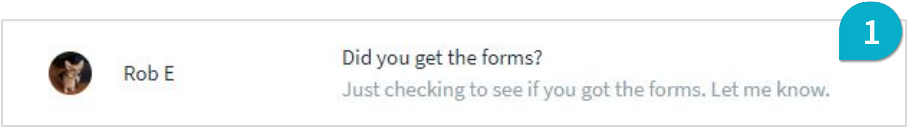
Unread

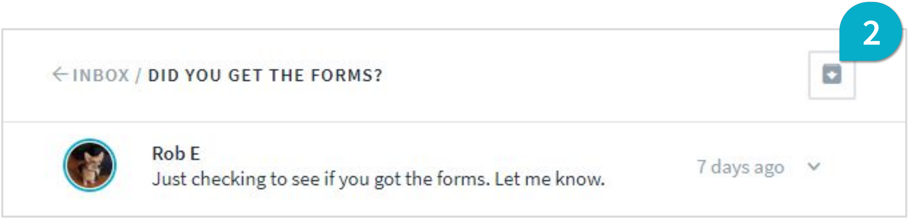
Pink dot & bold type indicate unread message.

Attachment

Preview attachment file names.

Inbox





Archive a Message

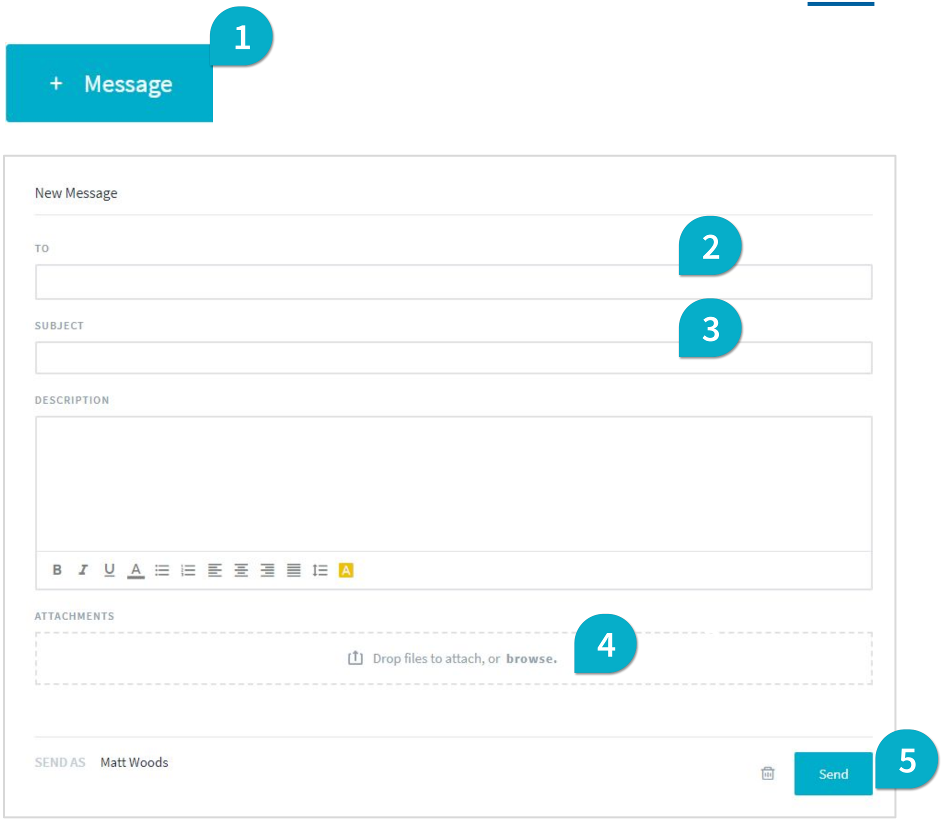
Step 1

Select message

Step 2

Click **Archive**

Inbox



Create a Message

Step 1

Click **+ Message**

Step 2

Click “To” field; enter Recipient & Account

Step 3

Enter Subject Line & Description

Step 4

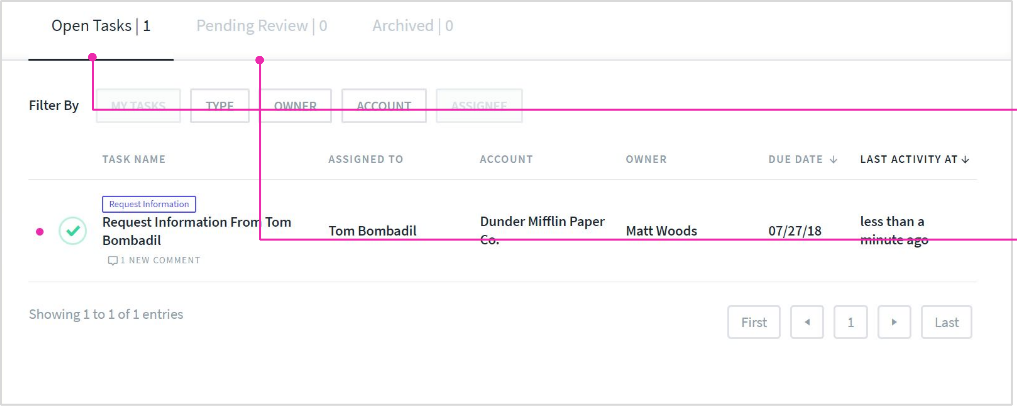
Drag & Drop files here, or click **browse**

Step 5

Click **Send**

Tasks

Items the firm needs you to complete.



Open Tasks

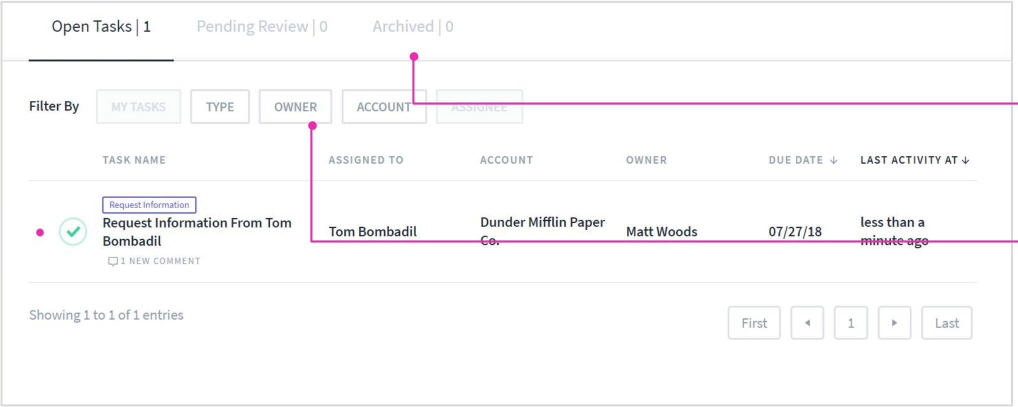
Tasks that the firm needs you to complete.

Pending Review

Tasks awaiting your review.

Tasks

Items the firm needs you to complete.



Archived

Completed tasks.

Sorting and Filtering Tasks

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

Accounts

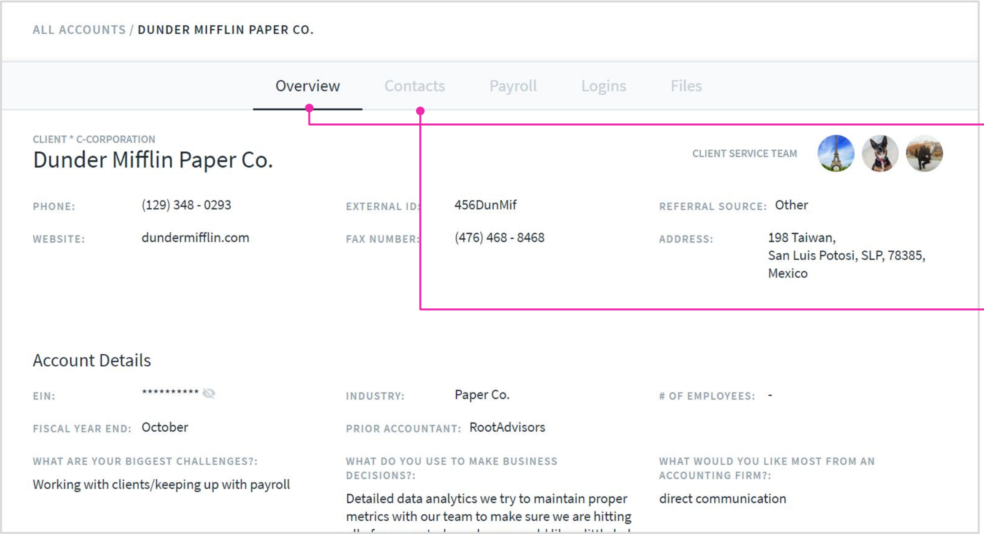
All Accounts that you own.

ALL ACCOUNTS

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

Accounts

Selecting an Account displays the Account's Details.



Overview

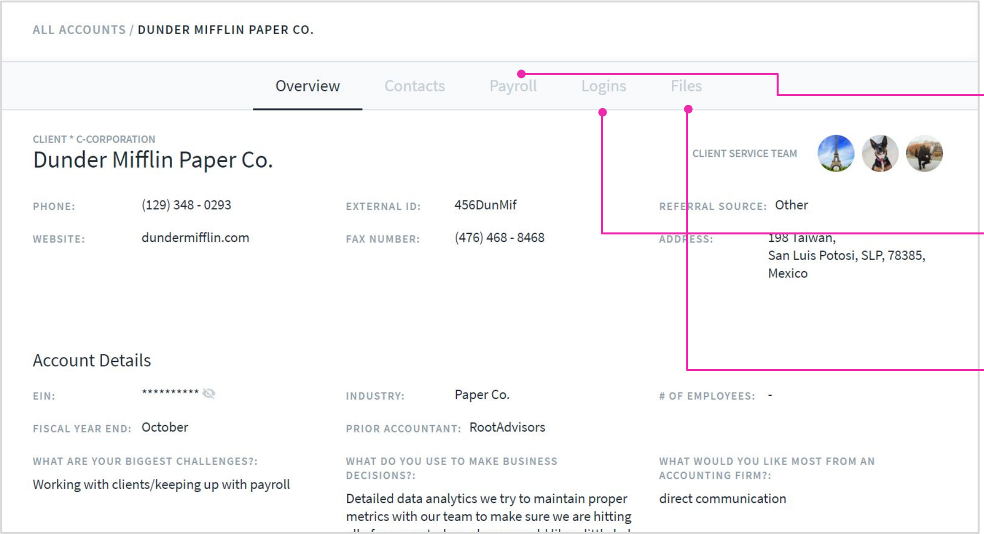
Click on an Account to see its demographic profile.

Contacts

All contacts associated with the Account.

Accounts

Selecting an Account displays the Account's Details.



Payroll

Payroll information for the Account.

Logins

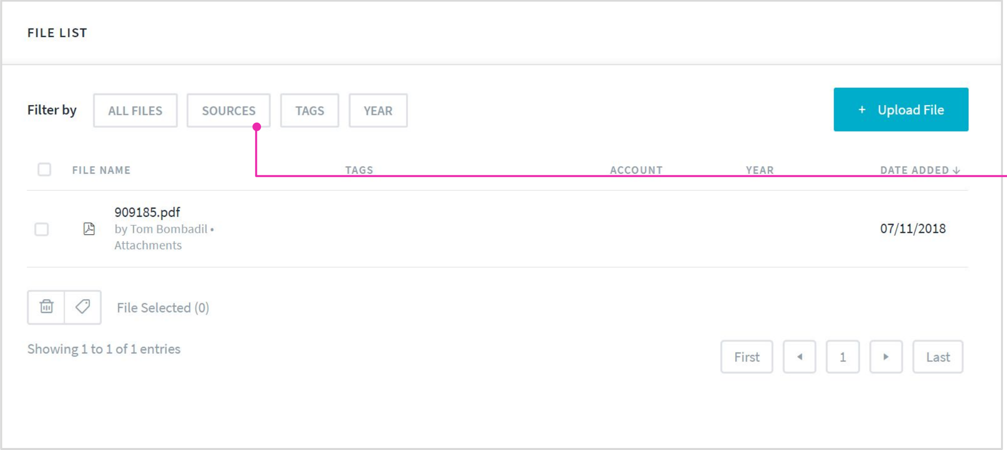
Account login info.

Files

All files uploaded to the Account.

Files

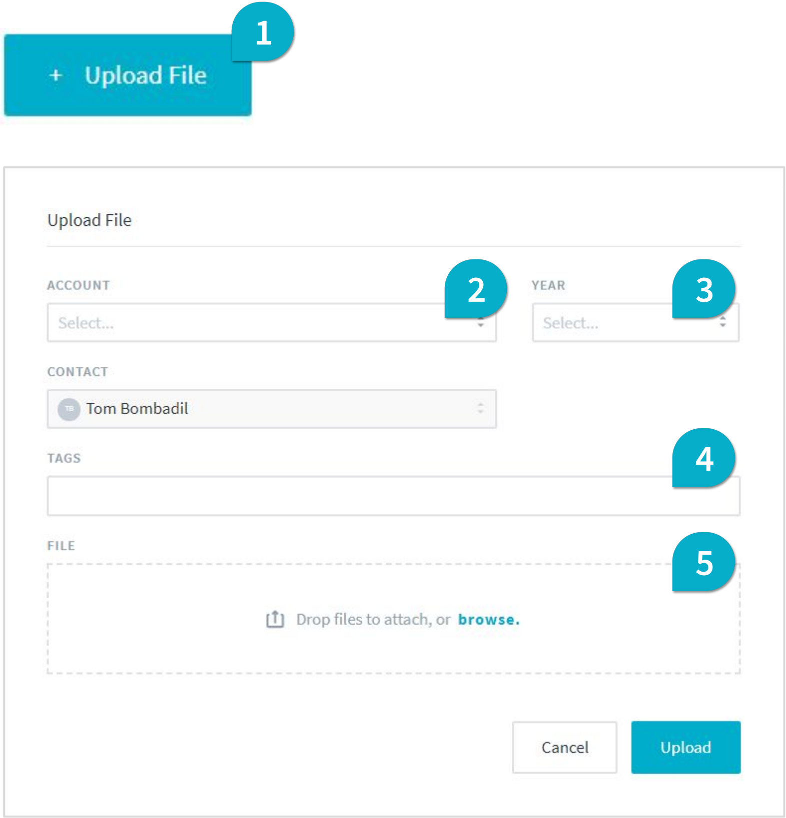
All Files that you've uploaded to Liscio.



Filter

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

Files



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