



# Welcome to Liscio Pro

Setup & Tutorial

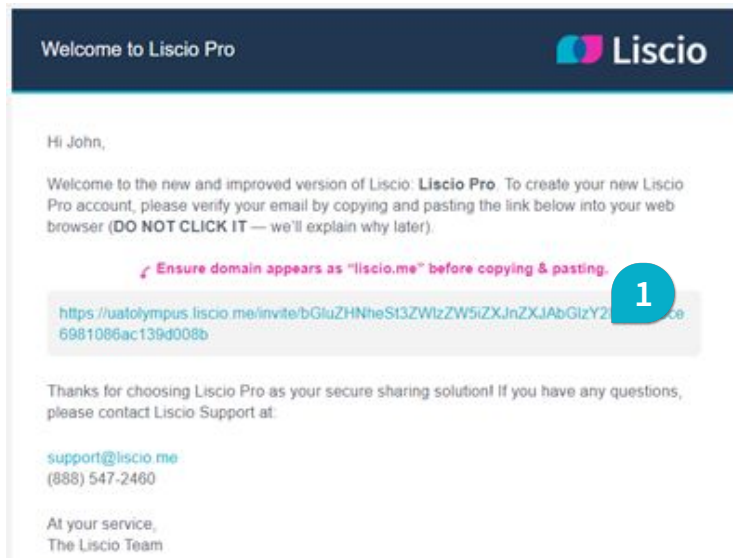




# Welcome to secure sharing.

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

# Getting Started



## The Invite

### Step 1

Copy & paste the invite link into your browser

# Getting Started

---



Invite to Liscio

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

EMAIL

PASSWORD

CONFIRM PASSWORD

## The Setup

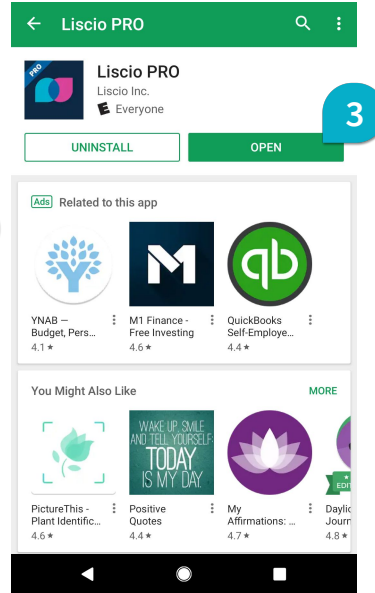
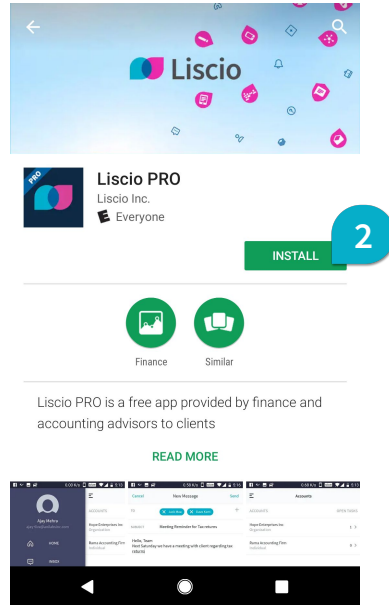
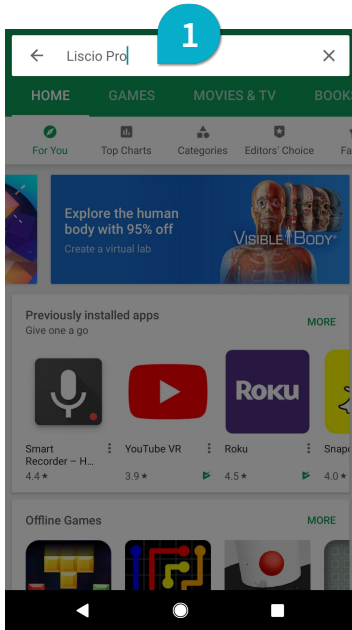
Step 2

Create Password

Step 3

Confirm Password & Click **Next**

# Download the App



## Download the App

Step 1

Search **Liscio PRO** in App Store

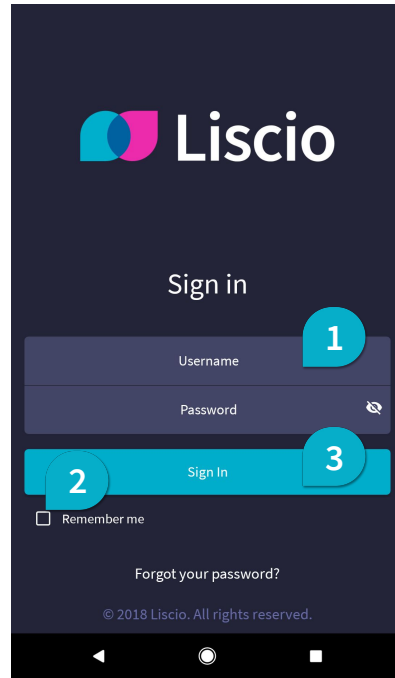
Step 2

Tap **Install**

Step 3

Tap **Open**

# Login



## Logging In

### Step 1

Enter Username & Password

### Step 2

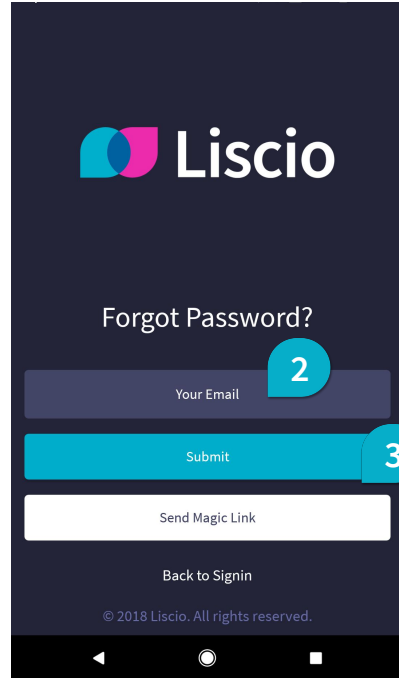
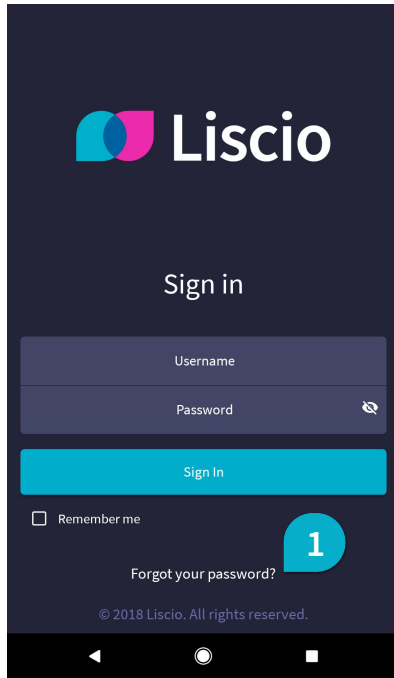
Tap **Remember me** (Optional)

### Step 3

Tap **Sign In**

# Forgot Your Password?

---



## Forgot Password?

### Step 1

Tap **Forgot your password?**

### Step 2

Enter Username

### Step 3

Tap **Submit** or **Send Magic Link**



# Getting Started

### Terms of Services

#### PRIVACY POLICY

This Policy details our commitment to protecting the privacy of those who access our websites. Our websites may contain links to other websites and the information practices and the content of such other websites are governed by the privacy statements of such other websites.

#### Personal Information You Provide

We may receive and store any information you enter on our website or provide to us in any other way. The types of Personal Information collected include your full name, physical address, email address, IP address and password. We also ask for and collect personal information such as an email address and a name or alias from any individual that you authorize to log into and utilize our Services in connection with Your Account.

#### Cookies and Other Tracking Technologies

We use cookies and other information gathering technologies for a variety of purposes. These include analysis of usage data for purposes of improving our service and analysis of behavioral data for purposes of improving the effectiveness of our marketing.

#### Use of Information

We use information provided to us **1** shared by us in order to

Agree to the Above

**2**

Cancel Submit

## Terms of Services

### Step 1

Check box to accept Terms of Services

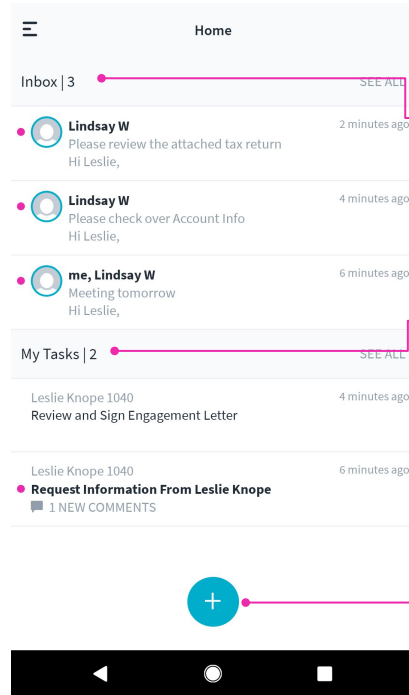
### Step 2

Tap **Submit**



# Home Dashboard

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



## Inbox

Messages between you and the firm.

## My Tasks

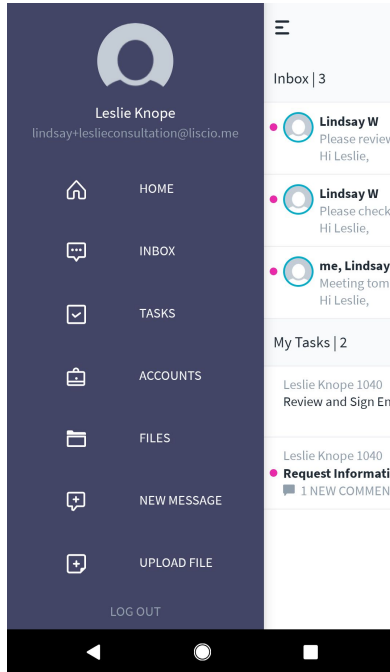
Tasks that have been sent to you by the firm.

## Message or Upload File

Tap + to create a new message or upload a file.

# The Navigation Panel

Swipe right to view the **Navigation Panel**.



## Profile

Shows your profile picture, name, and email.

## Home

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

## Inbox

See all messages.

## Tasks

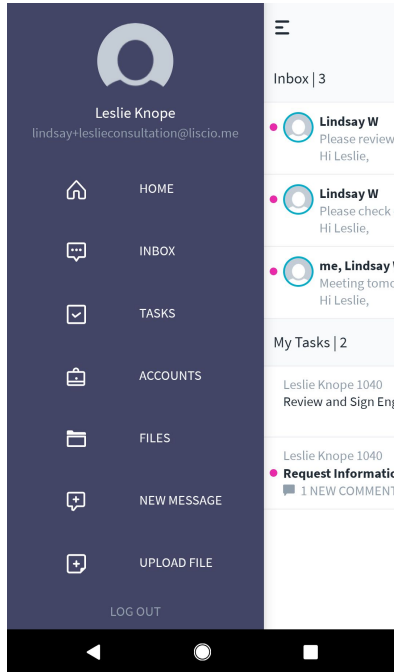
See all tasks: **Open**, **Pending Review**, and **Archived**; filter by **Type**, **Owner**, and **Account**.

## Accounts

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

# The Navigation Panel

Swipe right to view the **Navigation Panel**.



## Files

See the files that you or the firm has uploaded.

## New Message

Tap to create a **New Message**.

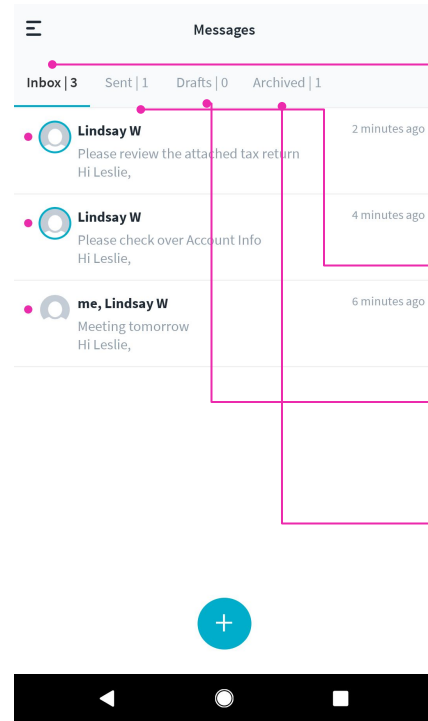
## Upload File

Tap to **Upload File**.

## Logout

Log out of Liscio.

# Inbox



**Inbox**

Messages you've received.

**Sent**

Messages you've sent.

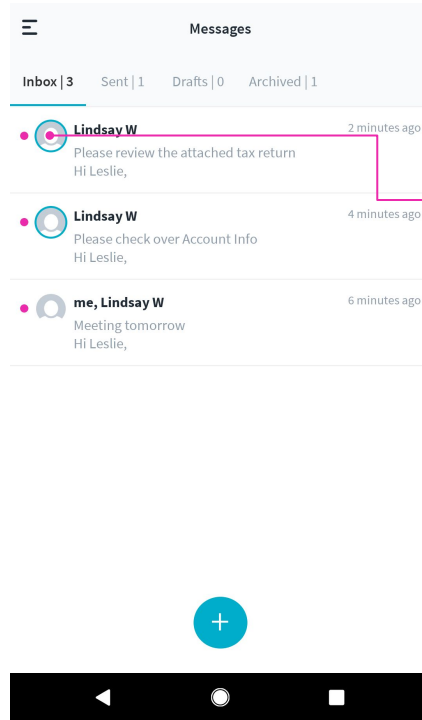
**Drafts**

Messages in progress or saved for later use.

**Archived**

Messages you've archived.

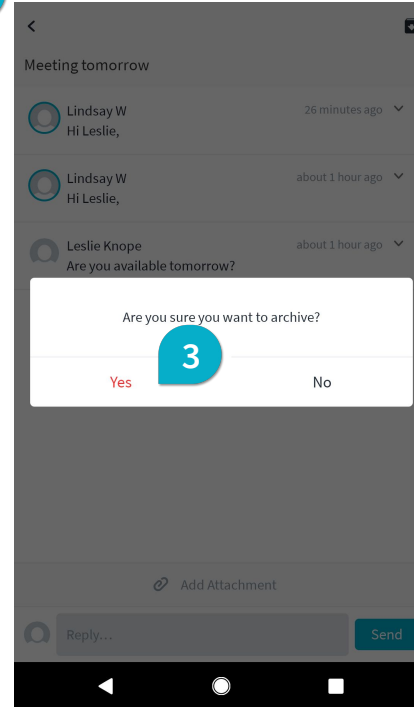
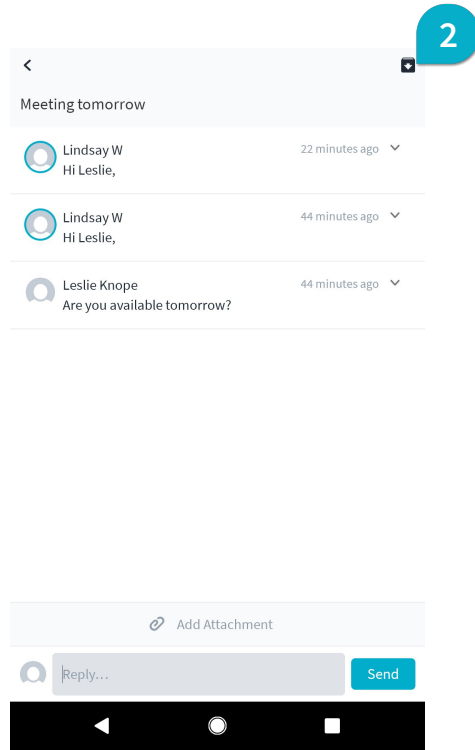
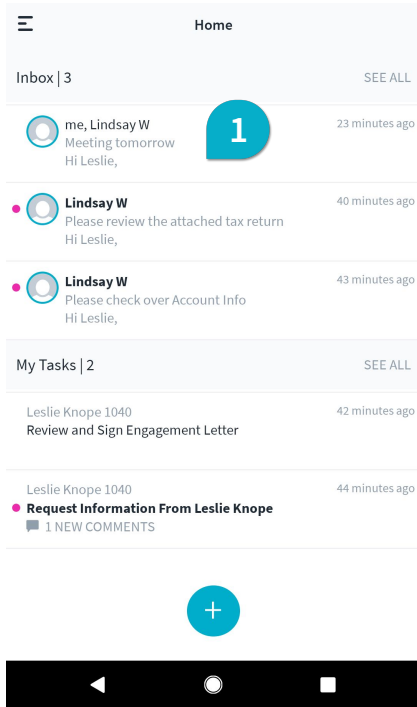
# Inbox



Unread

Pink dot & bold type indicate unread message.

# Inbox



## Archive a Message

Step 1

Tap Message

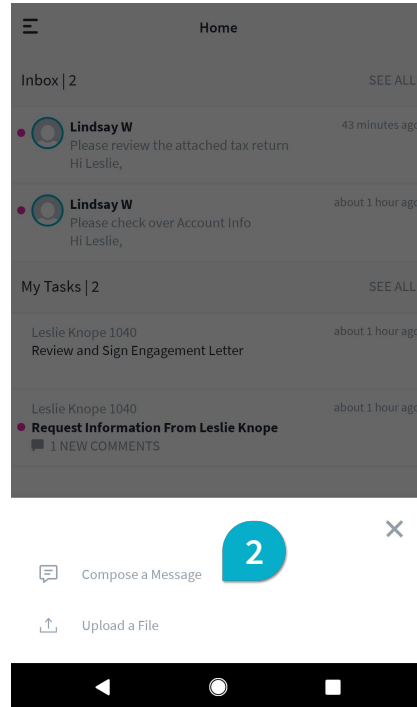
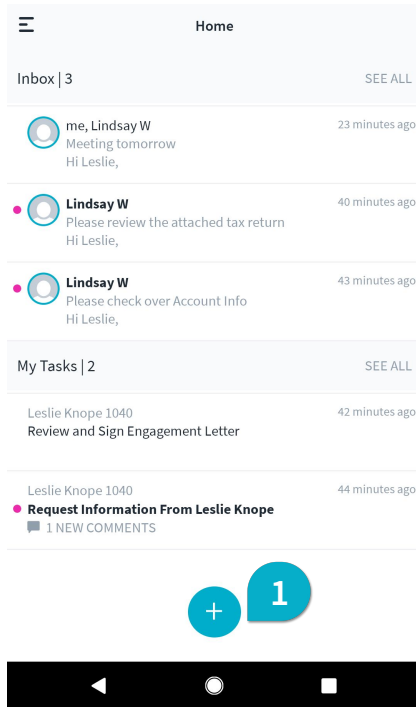
Step 2

Tap **Archive**

Step 3

Tap **Yes**

# Inbox



## Create a Message

Step 1

Tap +

Step 2

Tap **Compose a Message**

# Inbox

Cancel    New Message    Send

TO    Add Employee    +

SUBJECT    Message Subject

Write a Message...

ⓘ Add Attachment



## Create a Message

### Step 3

Tap “**To**” field; choose Employee

### Step 4

Enter Subject Line & Description

### Step 5

Tap **Add Attachment** (Optional)

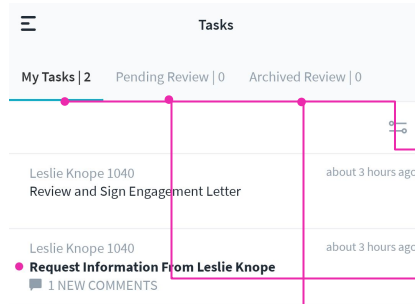
### Step 6

Tap **Send**



# Tasks

Items the firm needs you to complete.



## My Tasks

Tasks that the firm needs you to complete.

## Pending Review

Tasks awaiting your review.

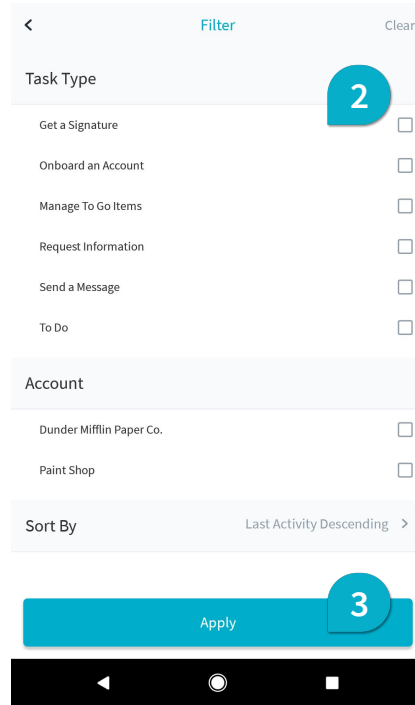
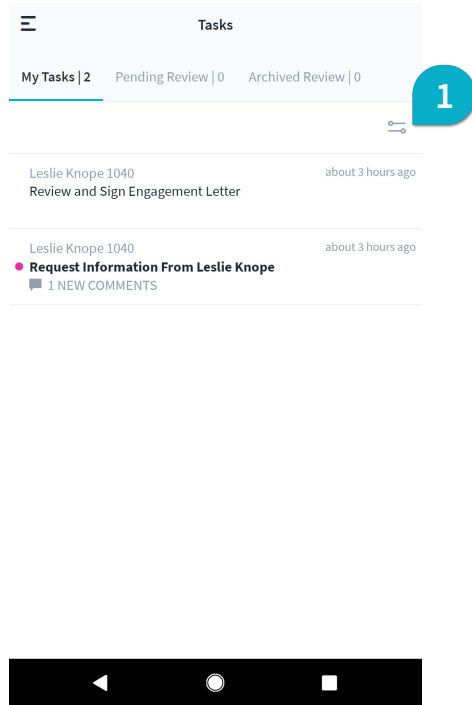
## Archived

Completed tasks.



# Tasks

Items the firm needs you to complete.



## Sorting and Filtering Tasks

### Step 1

Tap the **Filter** button.

### Step 2

Filter by **Type**, **Owner**, and **Account**. Sort by **Last Activity Ascending** or **Descending**.

### Step 3

Tap **Apply**.

# Accounts

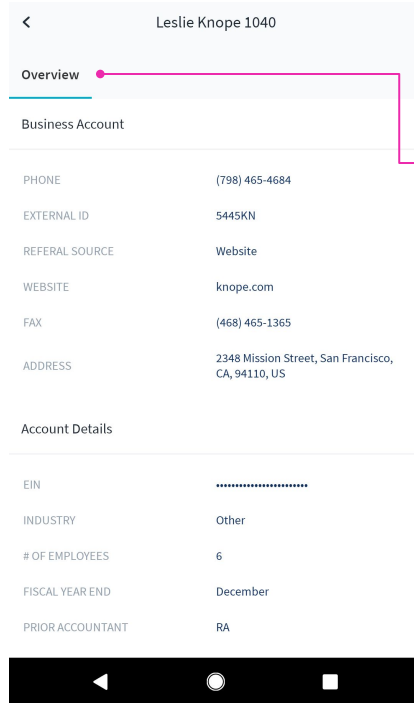
All Accounts that you own.

Accounts	
ACCOUNTS	OPEN TASKS
Dunder Mifflin Paper Co. C-Corporation	2 >



# Accounts

Selecting an Account displays the Account's Details.

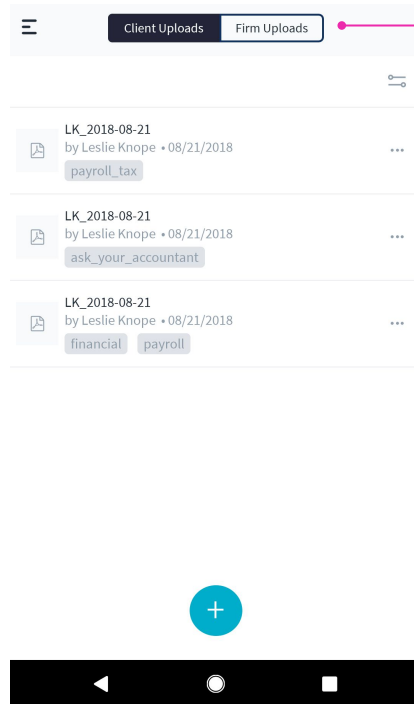


Overview

Tap on an Account to see its demographic profile.

# Files

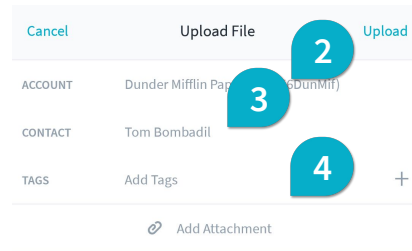
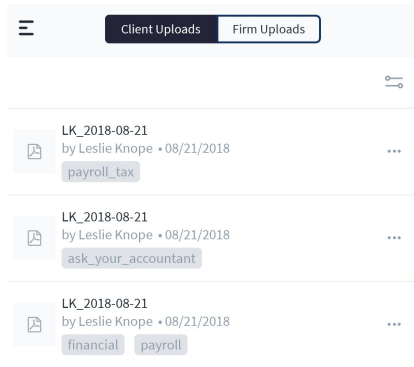
All Files that you've uploaded to Liscio.



Filter

Filter by selecting one of the filter buttons above the file list.

# Files



## Uploading a File

Step 1

Tap +

Step 2

Select Account

Step 3

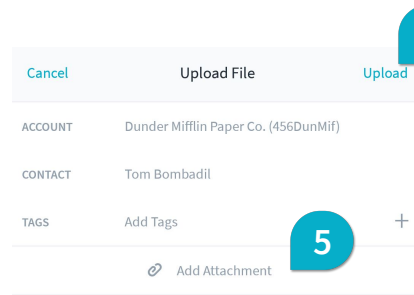
Select Contact

Step 4

Add appropriate Tags



# Files



6

Uploading a File

Step 5

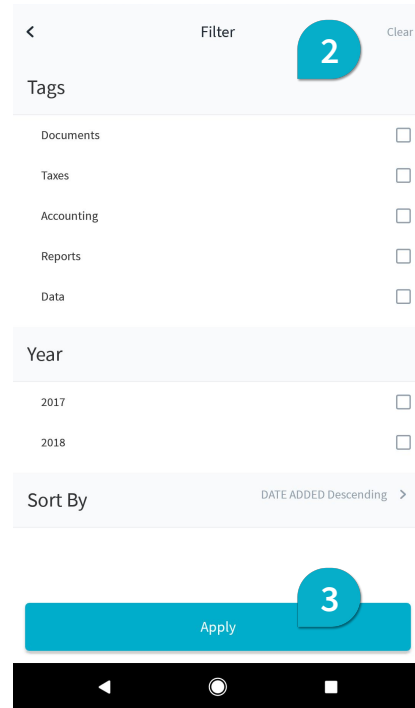
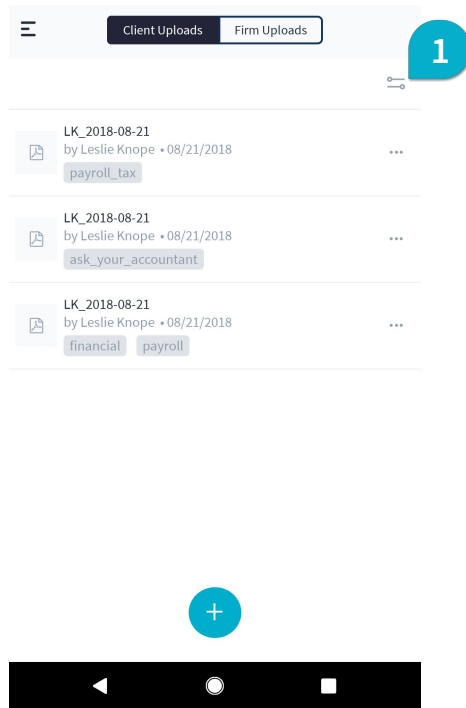
Tap **Add Attachment**

Step 6

Tap **Upload**



# Files



## Sorting and Filtering Tasks

### Step 1

Tap the **Filter** button

### Step 2

Filter by **Tags** and **Year** or sort by **Date Added**

### Step 3

Tap **Apply**




# 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](mailto:support@liscio.me)

 (888) 547-2460

 [Liscio Knowledge Base](#)

**Click below for:**

 [Liscio Website](#)

 [Liscio YouTube Channel](#)