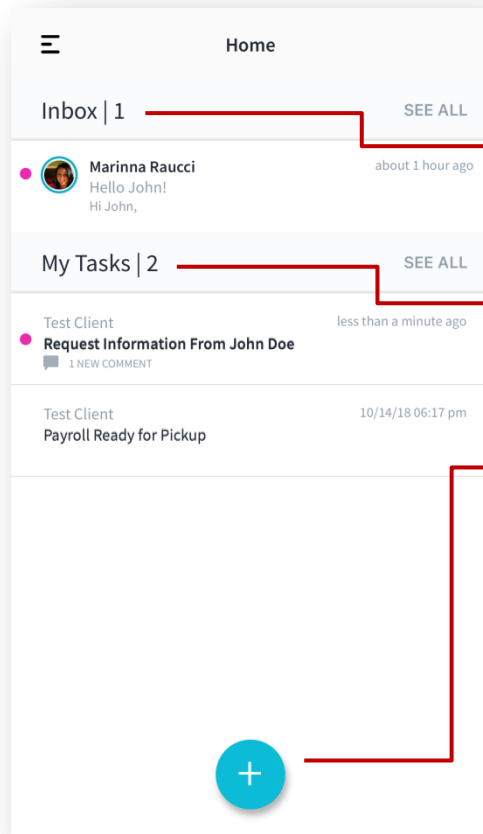


Client Mobile App Navigation

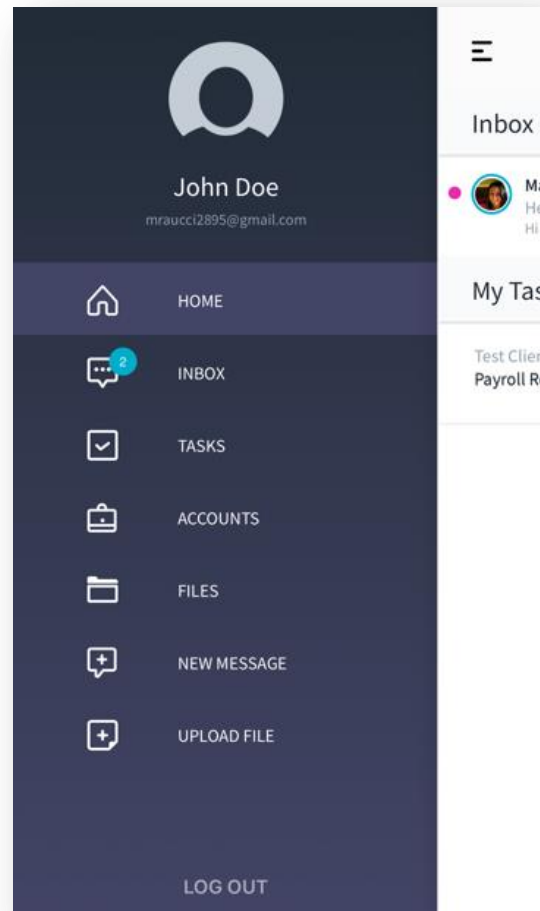


Inbox –
Messages between you and the firm

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

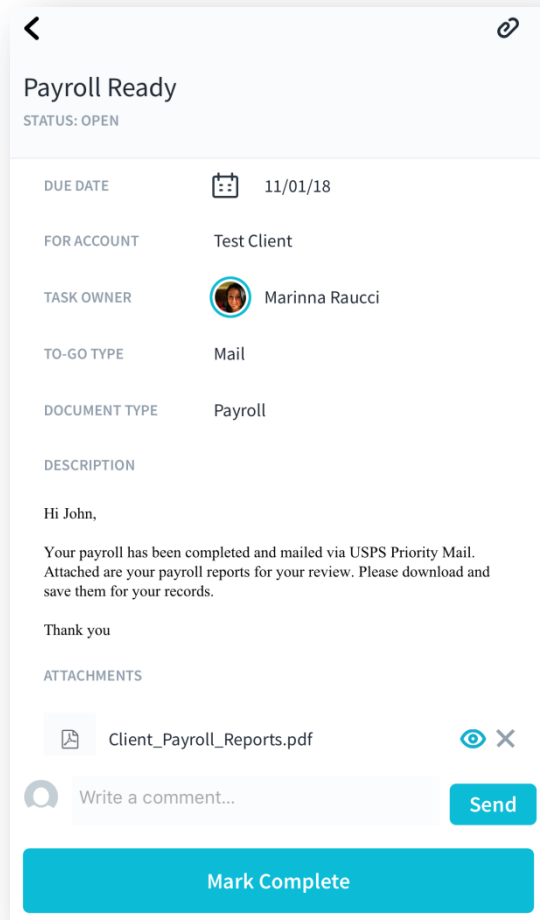
Note:
Pink dot & bolded text indicates unread message or task



Sidebar Overview

- **Home** – Dashboard view shows Inbox and My Tasks
- **Inbox** – See all messages
- **Tasks** – See all tasks
- **Accounts** – See all accounts you have Account Ownership on
- **Files** – See the files 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

Client Mobile App Navigation



Completing a Task

1. View attached documents or reports to confirm accuracy
 - a. Download Reports (see below for steps)
2. Add any comments to staff if needed
3. When task is ready to be completed, tap Mark Complete
4. Confirm task is complete by tapping Proceed
5. X out of Task Completed Successfully

Viewing & Downloading Attachments

1. Tap on the document or reports to view
2. To download, tap on the upper right hand arrows to download to folder or application of your preference

