ToolGPA

NOVEMBER 2026

Liscio

The Insider's Guide

Client file and communication portal for accounting firms



Every plan, grade, refund rule and rival among accounting and invoicing tools, read from Liscio's own pages.

Made by Liscio, Inc. · checked Nov 13, 2026 · toolgpa.com

2.0
GPA



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ToolGPA put this guide together from Liscio's own pages, its app-store listings and our grades. Every fact in it is on Liscio's page too, where it is kept up to date. Checked Nov 13, 2026.

Welcome

What it is, who it suits, its grades and the ten things to know first

2.0

GPA, above 22 of the 127 other accounting and invoicing tools we grade

Liscio is a client-workflow platform for tax and bookkeeping firms. Its File Intelligence layer reads, classifies and names incoming files, and the full platform adds secure messages, client tasks, organizers, e-signatures and email integration. Plans are priced per user and bought after a demo.

To get you started, here are **8 things to know about Liscio**, taken from its own pages and our grades.

> **There is no trial, you book a demo, and organizers and signer checks are charged per use on top of the seat price.**
>
> From our report card of Liscio

1 **Best for a client file and message portal for tax firms**

Liscio is a client portal for accounting firms, with file exchange, tasks, organizers and e-signature.

2 **Paid plans start at $19 a month for each person**

As its pricing page puts it: $19 per user / month, billed annually.

3 **It runs on Web**

Web.

4 **File Intelligence**

New documents are read, classified and named when they arrive, and existing folders can be moved in with their names and structure intact.

5 **Secure messages and timeline**

Each client has a timeline of secure messages and files, so requests and replies stay with the client instead of in email.

6 **Client tasks and requests**

Tasks, requests and due dates are sent to clients from the Liscio Platform plan.

7 **A 2.0 GPA, above 22 of 127**

That is against the other accounting and invoicing tools we grade, on value, the free plan, features, ease of use and platforms.

8 **Keep it**

To replace Liscio you would be making connections to other products, each kept working as those products change. That is not a weekend's work, with an AI app builder or without one.

Liscio at a glance

PRICING Paid, from $19 per user / month, billed annually	FREE PLAN No
FREE TRIAL None stated	RUNS ON Web
MADE BY Liscio, Inc.	CATEGORY Accounting & Invoicing
OUR GRADE 2.0 GPA, fair	

The report card

Best for a client file and message portal for tax firms

Liscio is a client portal for accounting firms, with file exchange, tasks, organizers and e-signature. There is no trial, you book a demo, and organizers and signer checks are charged per use on top of the seat price.

TOOLGPA REPORT CARD	Liscio	Graded Nov 13, 2026
SUBJECT	GRADE	COMMENT
Value for money	C	$19 per user a month for File Intelligence and $49 for the Platform, both billed annually, inside the typical range. Per-use charges for organizers add to it.
Free plan and trial	F	There is no free plan and no self-serve trial; the page points to a booked demo.
Features	B	File intake and naming, messages, client tasks, tax organizers, e-signature and cloud storage connections cover the whole client-portal job.
Ease of use	C	A web app where you set up client folders, branding and organizers, with onboarding on the Platform plan, and no store rating on record.
Platforms and integrations	B	Web only, with OneDrive, Google Drive, Box, SmartVault, Outlook, Gmail and SharePoint.
Grade point average		Fair, out of 4.0 **2.0**

An A is worth 4 points, a B 3, a C 2, a D 1 and an F nothing. The GPA is the average of the five.

Who Liscio is for

- ✓ Fits if your firm collects client documents and tax organizers every season
- ✓ Makes sense if you want files sorted into client folders on arrival

Who it is not for

- ✗ Not for you if you want to try it first, as there is no self-serve sign-up or free trial
- ✗ Pricey if you send many organizers, at $7 each unsent in a bundle or $4 to $5 in prepaid bundles
- ✗ Tight if you want monthly billing, since monthly plans are only available by contacting Liscio
- ✗ Watch out: knowledge-based authentication for e-signature costs $2 per signer and a firm website is $29 a month
- ✗ Watch out: Outlook and Gmail integration, tasks and e-signature need the $49 Platform plan

Good to know

Good for

- ✓ Tax firms that exchange many documents with clients
- ✓ Bookkeeping firms that want one place for client files and messages
- ✓ Firms leaving FileCabinet CS

Worth knowing

- ⓘ Prices are per user and annual; monthly plans are available only by contacting Liscio.
- ⓘ Tax organizers and deliveries cost $7 each unsent in a bundle, or $4 to $5 each in prepaid bundles, and need a Platform seat.
- ⓘ Knowledge-based authentication for e-signature costs $2 per signer, and a firm website is $29 a month.
- ⓘ There is no self-serve sign-up or free trial; the page points to a booked demo.

PART 02 · PRICING

What it costs

Every plan, the free plan, ways to pay less and how prices have moved

$19

A month to start, for each person

Liscio is a paid product, starting at $19 per user / month, billed annually.

> **Per-use charges for organizers add to it.**
>
> From our grade for value for money

FILE INTELLIGENCE

$19

per user / month, billed annually

Files read, classified and named on arrival, existing folders moved in, secure file exchange and per-client file history.

LISCIO PLATFORM

$49

per user / month, billed annually

Adds Outlook and Gmail integration, client tasks and requests, organizers, e-signature, custom branding and onboarding.

TAX ENTERPRISE

Custom

For high-volume firms: custom File Intelligence routing to a document system, folders and naming rules, plus custom integrations.

Read from liscio.me on Nov 13, 2026.

Ways to pay less

OTHER SAVINGS

$4 tax organizers when bought by Nov 30

A limited-time offer prices Smart Tax Organizers at $4 each, at any volume, if bought by Nov 30; one Liscio Platform license is required.

Stated on liscio.me

What it does

Its main features, where it runs, what it works with and who makes it

1

Place it runs: Web

Client file and communication portal for accounting firms. Here is what it does, as its own site describes it, and what it covers: templates, tasks, workflow automation, documents, file sharing.

> **File intake and naming, messages, client tasks, tax organizers, e-signature and cloud storage connections cover the whole client-portal job.**
>
> From our grade for features

File Intelligence

New documents are read, classified and named when they arrive, and existing folders can be moved in with their names and structure intact.

Secure messages and timeline

Each client has a timeline of secure messages and files, so requests and replies stay with the client instead of in email.

Client tasks and requests

Tasks, requests and due dates are sent to clients from the Liscio Platform plan.

Tax organizers and delivery

Smart tax organizers and tax deliveries are sold per item on top of a platform seat.

E-signature

E-signature is part of the Liscio Platform plan; knowledge-based authentication is an add-on.

Cloud storage connections

Files can be pulled from or sent to OneDrive, Google Drive, Box and SmartVault.

Where it runs

- Web

What it works with

- OneDrive
- Google Drive
- Box
- SmartVault
- Outlook
- Gmail
- SharePoint

Liscio is made by Liscio, Inc.

Where it stands

Its grades against its category, and whether to keep it or make your own

22/127

Other accounting and invoicing tools it is graded above

Liscio's GPA of 2.0 is higher than 22 of the 127 other accounting and invoicing tools we grade, and level with 20.

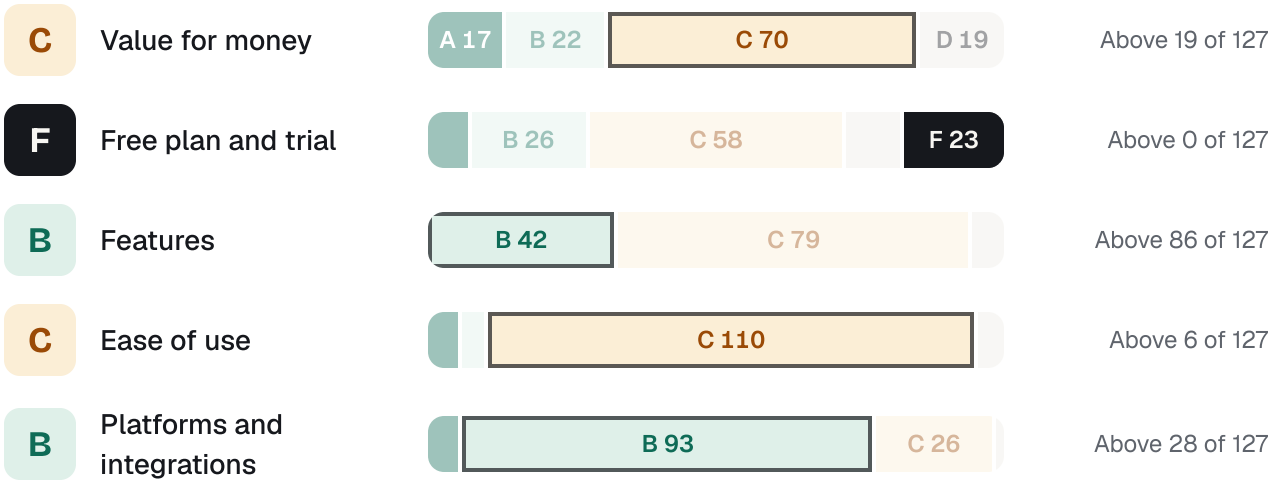
It stands best on features (B, above 86 of 127) and worst on free plan and trial (F, above 0).

Its paid plans start at $19 a month for each person, against a middle price of $18.09 for the category: 46 of the 90 others that charge start lower.

On features, ease of use and platforms it scores 2.7 out of 4. 3 tools score higher and cost less.

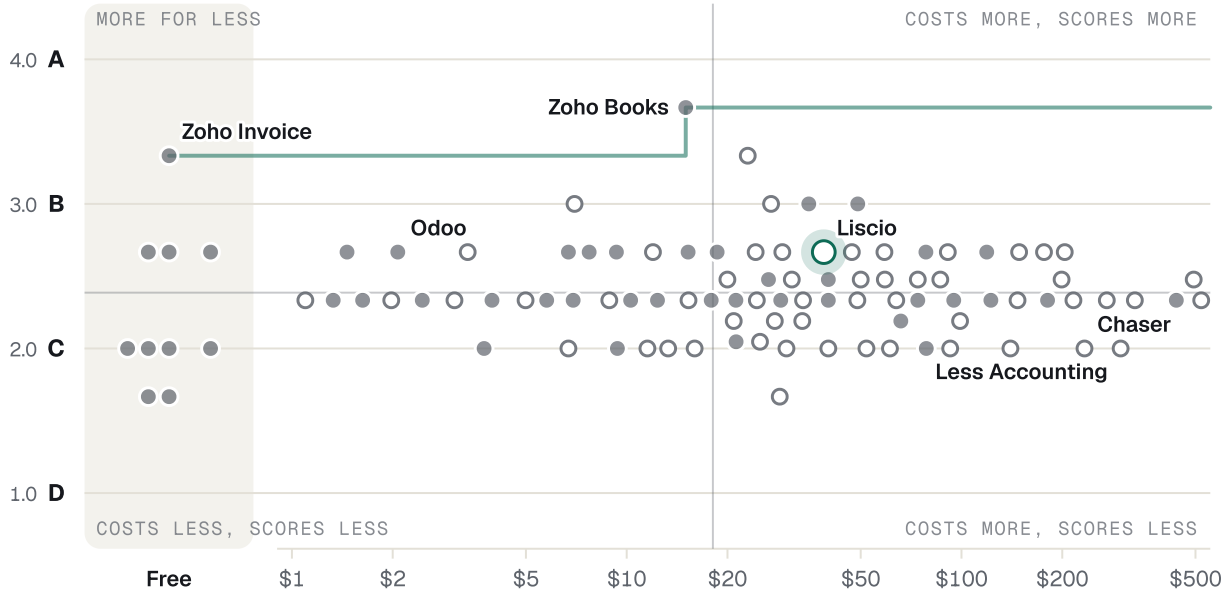
Each grade against the category

Every bar is all 128 accounting and invoicing tools we grade, cut by the letter each got. Liscio's own letter is outlined.



Price against what you get

Each dot is one of 101 accounting and invoicing tools. Further left costs less; higher up scores better on features, ease of use and platforms. Liscio is the marked dot.



What paid plans start at, a month (each step along is roughly double)

Keep it, or make your own?

Whether this is something you could build for yourself with an AI app builder, and what you would give up.

Keep it

To replace Liscio you would be making connections to other products, each kept working as those products change. That is not a weekend's work, with an AI app builder or without one.

That makes this kind of software worth paying for, not this one in particular: 85 of the 127 other accounting and invoicing tools grade higher. It costs $228 a year.

What you could make

- Documents, tasks and templates: an app builder makes these well.

What you could not

- Connections to other products, each kept working as those products change.
- Storing and serving files for other people.
- It is priced for each person, which means accounts and billing for a team.
- The depth: we grade its features B, which means it covers the whole job.

What this rests on. Liscio's listing: what it does, where it runs, what it plugs into and what it costs. It is a judgement about the kind of software this is. We have not built a replacement for it, and making your own means looking after it too. How we decide, and every tool's verdict.

The alternatives

The tools it is most often weighed against, side by side



SmartVault, TaxDome, Canopy, Karbon and Financial Cents

The 5 tools Liscio is most often weighed against, with where each one differs from it.

SmartVault

2.0 GPA

Free trial · from $65/mo

Document management and client portal for accounting firms.

- Liscio also covers templates and tasks.
- SmartVault also covers forms and quotes and estimates.

Liscio and SmartVault compared in full

TaxDome

Paid

Practice management and client portal for tax and accounting firms.

- Only TaxDome lists an iOS app.
- Liscio also covers tasks and file sharing.
- TaxDome also covers forms and invoicing.

Liscio and TaxDome compared in full

1.6 GPA

Canopy

From $74/mo

Practice management software for accounting and tax firms.

- Only Canopy lists iOS and Android apps.
- Liscio also covers templates, tasks, documents and file sharing.
- Canopy also covers time tracking, invoicing and reports.

Liscio and Canopy compared in full

1.6 GPA

Karbon

From $59/mo

Practice management software for accounting firms.

- Only Karbon lists iOS and Android apps.
- Liscio also covers templates, documents and file sharing.
- Karbon also covers shared inbox, time tracking and invoicing.

Liscio and Karbon compared in full

2.4 GPA

Financial Cents

Free trial · from $19/mo

Practice management for accounting and bookkeeping firms.

- Liscio also covers templates and file sharing.
- Financial Cents also covers time tracking, invoicing and reports.

Liscio and Financial Cents compared in full

PART 06 · QUESTIONS

Quick answers

The questions people ask about it, each answered in a line or two

13

Questions, each answered in a line or two

The short version of everything above, for when you only need the answer. Each one is told in full in its part of the guide.

Is Liscio free?

No. Liscio is a paid product, starting at $19 per user / month, billed annually.

How much does Liscio cost?

Liscio lists 3 plans. File Intelligence: $19 per user / month, billed annually.

What platforms does Liscio work on?

Liscio is available on Web.

Does Liscio offer any discounts?

Liscio publicly lists the following: $4 tax organizers when bought by Nov 30.

Does Liscio have an Android app?

No Android app was listed when its pages were read on Nov 13, 2026. Liscio is listed for Web.

Does Liscio have an iPhone app?

No iPhone app was listed when its pages were read on Nov 13, 2026. Liscio is listed for Web.

Is Liscio open source?

Liscio is not described as open source on its own site, as read on Nov 13, 2026.

What does Liscio integrate with?

Liscio's listing names OneDrive, Google Drive, Box, SmartVault, Outlook, Gmail and SharePoint.

Who makes Liscio?

Liscio is made by Liscio, Inc.

What are the alternatives to Liscio?

The closest alternatives to Liscio in our directory are SmartVault, TaxDome, Canopy, Karbon and Financial Cents.

How does Liscio compare with other accounting and invoicing tools?

Liscio's GPA of 2.0 is higher than 22 of the 127 other accounting and invoicing tools we grade, and level with 20.

Is Liscio good value for money?

ToolGPA grades Liscio C for value for money. Its paid plans start at $19 a month for each person, against a middle price of $18.09 for the category: 46 of the 90 others that charge start lower.

Could I make my own version of Liscio?

To replace Liscio you would be making connections to other products, each kept working as those products change.

Where this guide comes from

The prices, plans, platforms and features were read from Liscio's own pages on Nov 13, 2026, and the grades were given on Nov 13, 2026. Graded from this listing, whose facts were read from Liscio's own pages on 13 November 2026. Not based on using the product, and shorter than our full reviews.

Every tool we list gets five grades, A to F, each with its reason, and a GPA that averages them. How each is decided is at toolgpa.com/grades. This guide is ToolGPA's own work; it is not made, paid for or approved by Liscio, Inc. Prices change, so check liscio.me before you buy.

liscio.me/pricing
liscio.me/integrations
liscio.me/

About ToolGPA

Who made this guide, what else is on the site, and how to cite it

7,721

Tools graded, in 95 categories

ToolGPA grades software the way a school report grades a pupil: five subjects, a letter for each with the reason written beside it, and a GPA that averages them. Prices, plans and platforms are read from each maker's own pages and dated, so you always know how fresh a figure is.

Every grade, review and ranking on ToolGPA is our own judgement. No company can pay for a grade or change one. Every tool on the site has a guide like this one, free to download and pass on. It all lives at **toolgpa.com**.

7,721	95	739	579
tools graded	categories	price changes on record	apps priced in 12 countries

What else is on toolgpa.com

Liscio, kept up to date

Everything in this guide, with prices and grades as they are today

toolgpa.com/tools/liscio

How grades are given

The rules behind every letter and every GPA

toolgpa.com/grades

Value charts

What each tool costs against what it scores, for every category

toolgpa.com/charts

Compare

Any two tools side by side, plan by plan

toolgpa.com/compare

Price changes

Every price rise and cut on record, each with its source

toolgpa.com/price-changes

Prices by country

What apps cost on the App Store in 12 countries

toolgpa.com/prices-by-country

Pay less

Every public discount: yearly billing, students, nonprofits

toolgpa.com/save

Keep or make

Which tools are worth paying for, and which you could build yourself

toolgpa.com/keep-or-make

Scan for the live page

Prices and grades as they are today

Quoting this guide?

Please name ToolGPA and link to the live page, so readers can check the figures for themselves:

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ToolGPA, "Liscio: The Insider's Guide",
checked Nov 13, 2026.
https://toolgpa.com/tools/liscio
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Know someone choosing between accounting and invoicing tools?

Send them this guide: toolgpa.com/tools/liscio/guide

ToolGPA elsewhere: youtube.com/@toolgpa

See our other guides

The best-graded accounting and invoicing tools after Liscio, each with an Insider's Guide of its own.

Accounting & Invoicing Insider's Guide

Every one of the 129 accounting and invoicing tools we grade, compared

Zoho Invoice Insider's Guide

Free invoicing app from Zoho for freelancers and small businesses

3.6 GPA

Zoho Books Insider's Guide

Online accounting from Zoho, with a free plan and six paid tiers

3.4 GPA

Cash App Taxes Insider's Guide

Free federal and state tax filing inside Cash App

3.2 GPA

ToolGPA

Choosing software? Every tool graded, every price dated.

Compare tools at toolgpa.com ›

Everything in this guide is ToolGPA's own summary of what Liscio's pages, its app-store listings and public reviews said on the dates shown. Grades are our judgement under the rules at toolgpa.com/grades. Every grade, review and ranking on ToolGPA is our own judgement. No company can pay for a grade or change one. Liscio is a trademark of its owner, and this guide is not made, paid for or approved by Liscio, Inc. Prices and plans change: check liscio.me before you buy.