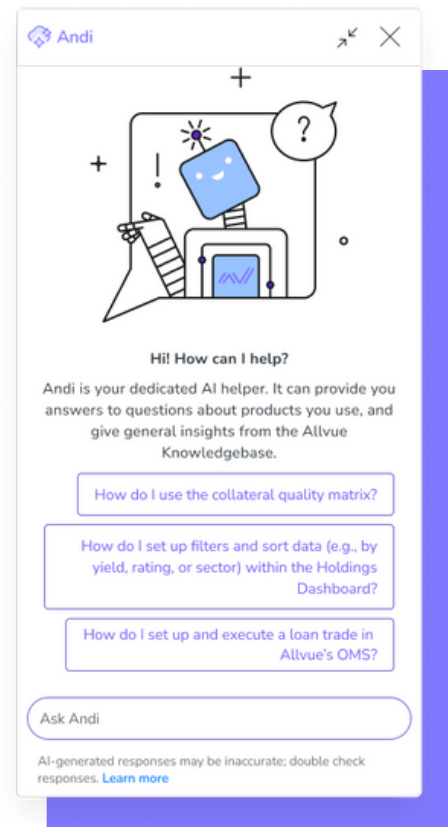# ALLVUE

Andi, Your AI Assistant

Powered by the Allvue Agentic AI Platform

CHALLENGE

Users need immediate answers within their workflow to maintain productivity and maximize product adoption without the delays of searching documentation or contacting support.

SOLUTION

Andi is a purpose-built AI browser-extension tool for the Allvue platform, designed to deliver real-time guidance sourced directly from Allvue's product documentation. Powered by the Agentic AI Platform, it functions as an embedded knowledge assistant, providing instant access to platform-specific answers and supporting users as they navigate complex workflows.

BUSINESS OUTCOMES

INCREASED PRODUCTIVITY

Eliminate workflow disruptions by providing instant answers without leaving the platform.

ACCELERATED ONBOARDING

Reduce time-to-proficiency for new users with contextual guidance at their moment of need.

REDUCED SUPPORT COSTS

Decrease support ticket volume by enabling users to self-service for common questions.

Getting Started

- Download the Andi AI extension via the Chrome Web Store or Microsoft Edge Add-ons.
- To get user access provisioned, please reach out to your Customer Success Manager.
- Available for Allvue Credit products (Portfolio Management, Research Management, Trade Order Management, Compliance, and Fund Finance). Unavailable to on-prem clients.
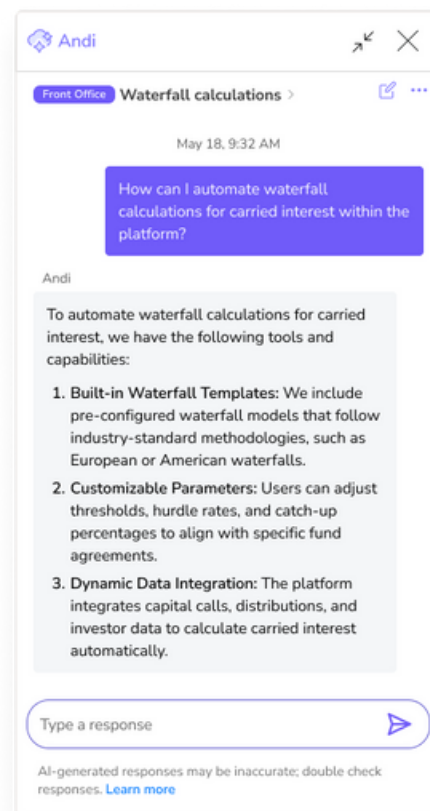
ALLVUE

FEATURES

- **Seamless Integration:** Install once across Credit products
- **Flexible Interface:** Seamless workflow integration
- **Natural Language Queries:** Ask questions your way
- **Guided Discovery:** Find capabilities through prompts
- **Contextual Understanding:** Dive deeper with follow-ups
- **On-Demand Expertise:** Access knowledge instantly
- **Conversation History:** Reference previous solutions
- **Continuous Learning:** Improves with your feedback

USE CASE EXAMPLES

Ask Andi questions like:

- "How do I use the collateral quality matrix?"
- "How do I set up filters and sort data?"
- "How do I set up and execute a loan trade in Allvue's OMS?"
- "How can I automate waterfall calculations for carried interest within the platform?"
- "How do I configure the carried interest calculations for specific investments?"
- "How can I set up allocation rules for distributions among investors?"

SECURITY & PRIVACY

Allvue prioritizes the security and privacy of your data with enterprise-grade protocols, strict governance standards, and minimal data retention practices. Use of Andi is governed by the Allvue AI Terms and Conditions and Allvue's Privacy Policy.

What's Coming

The Agentic AI Platform was built with scale and evolution in mind—and Andi is the first step in a much broader roadmap. Stay tuned for agents supporting:

- Equity Product Support
- Workflow Automation
- Data Query
- Guided Help
- Predictive Analytics

Getting Connected

Allvue empowers private capital managers to make superior investment decisions and fund administrators to more efficiently serve their clients. Contact us today!

LEARN MORE

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