

Andi, Your AI Assistant

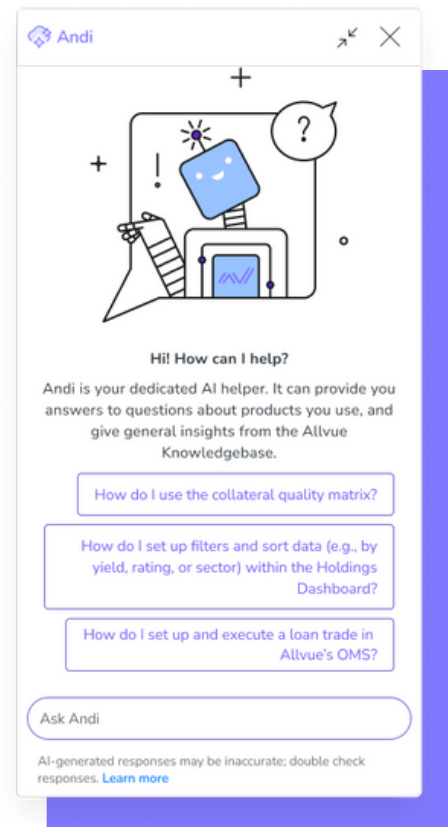
For Allvue's Credit Front Office Products

CHALLENGE

Managing front office operations means juggling complex workflows and users need immediate answers within their workflows to maintain productivity 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



INCREASE PRODUCTIVITY

Minimize delays and keep work moving with faster access to the answers users need.



ACCELERATE WORKFLOWS

Reduce friction during key tasks by surfacing guidance directly in the extension.



ACCESS INSTANT EXPERTISE

Deliver trusted guidance, support, and best practices at the moment of need.



Getting Started

- Download the browser 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) and Fund Accounting. Unavailable to on-prem clients.

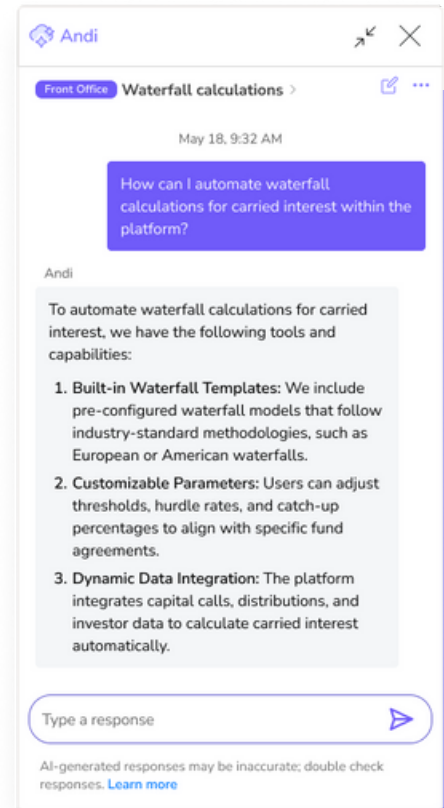
FEATURES

- **Natural Language Support** – Ask questions your way
- **Ongoing Context** – Follow up or clarify without starting over
- **Guided Discovery** – Explore platform capabilities through prompts
- **On-Demand Expertise** – Access product knowledge instantly
- **Conversation History** – Reference previous solutions
- **Continuous Learning** – Improves over time 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:

- Additional 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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