

Andi, Your AI Assistant

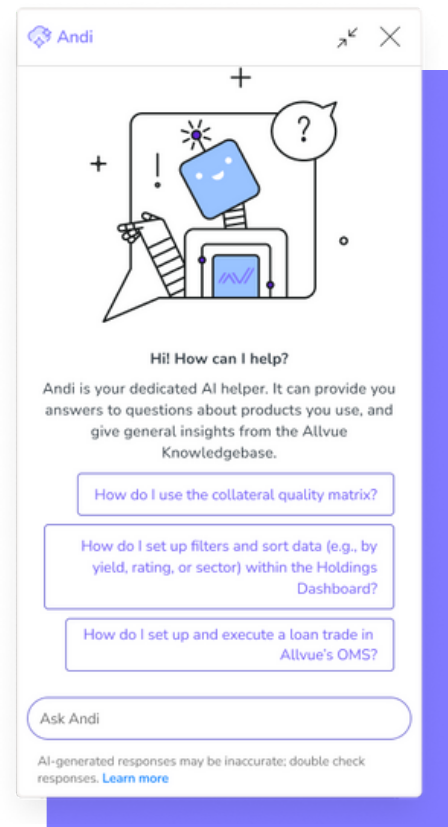
for Allvue's Fund Accounting solution

CHALLENGE

Managing back 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 an AI-powered knowledge assistant, now available for Fund Accounting, that delivers real-time, in-platform support through a simple browser extension. It provides step-by-step guidance drawn from Allvue's product documentation to help you complete tasks like capital calls and issuer setup quickly and confidently, without leaving your workflow.



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's Fund Accounting and Credit Front Office products.

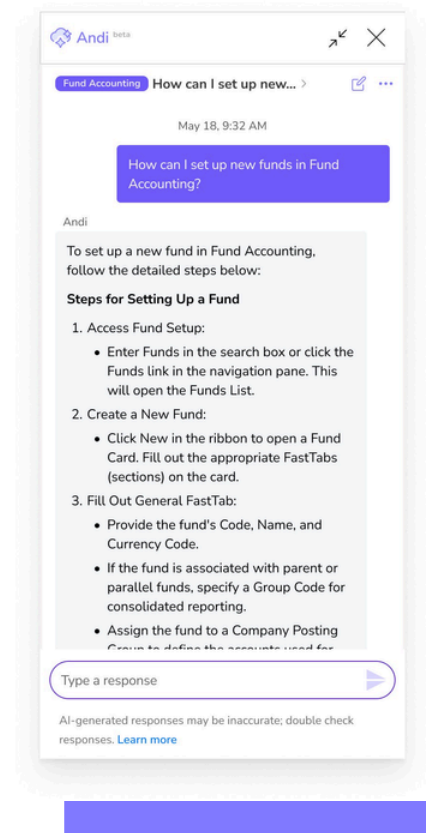
FEATURES

- **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 in Fund Accounting like:

- "How can I set up new funds in Fund Accounting?"
- "How do I run an equity pickup?"
- "How do I set up an issuer and security?"
- "How do I initiate a capital call in Fund Accounting?"
- "How can I configure access permissions to specific funds for different clients in Fund Administration?"
- "How can I apply vendor payments to invoices in Fund Accounting?"



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. Andi is the first step in a much broader roadmap. Stay tuned for agents supporting:

- Increased 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

North America Sales
+1 305-901-7060

EMEA Sales
+44 (0) 207 154 1010

allvuesystems.com