

Andi, Your AI Assistant

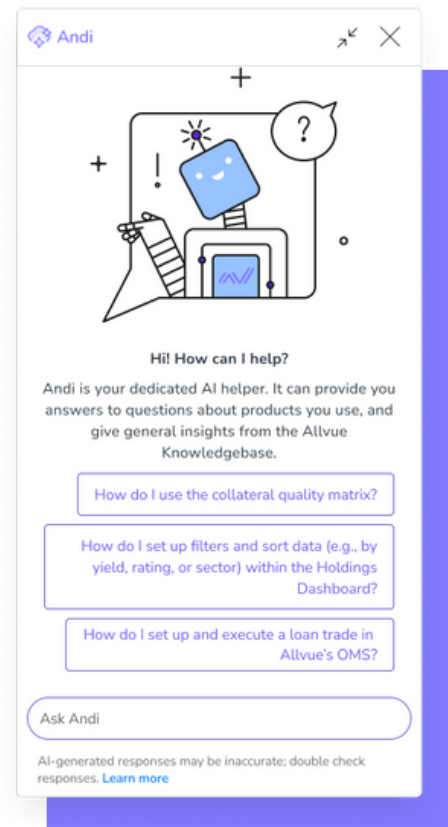
Powered by the Allvue Agentic AI Platform

CHALLENGE

Managing front and 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 that delivers real-time, in-platform support through a simple browser extension. It delivers step-by-step guidance from Allvue's product documentation to help you complete tasks. From waterfall calculations to capital calls and issuer setup, you can work quickly and confidently without ever 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

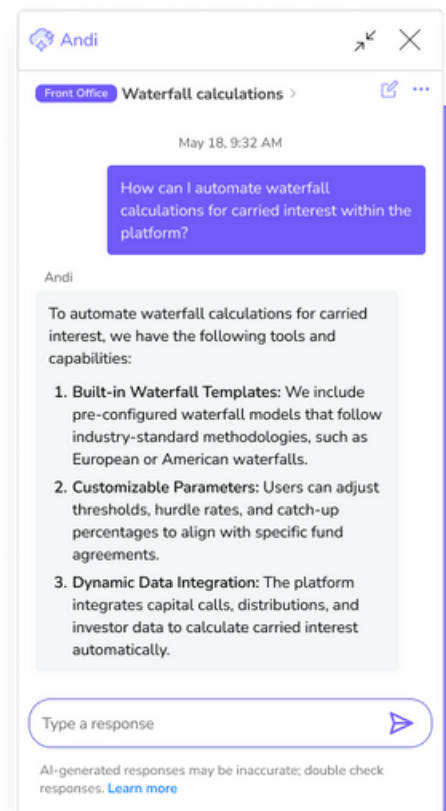
Deliver trusted guidance, support, and best practices at the moment of need.

AVAILABILITY

Andi is available as an extension browser at no additional cost for Allvue's Fund Accounting and all Credit Front Office products (Portfolio Management, Research Management, Trade Order Management, Compliance, and Fund Finance).

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



FUND ACCOUNTING USE CASES

Ask Andi questions 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?"



How to Get 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 Fund Accounting and Credit products. Unavailable to on-prem clients.

CREDIT FRONT OFFICE USE CASES

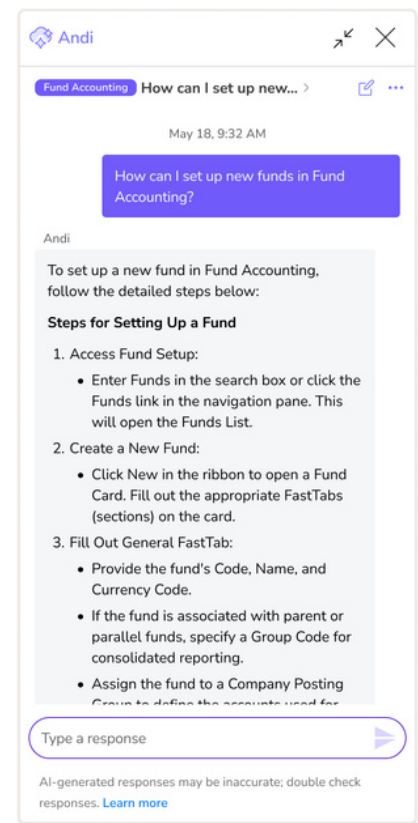
Ask Andi questions like:

- "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. 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

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