AUVENIR

5.4 Release Notes

Auvenir 5.4 Release Notes

We're pleased to bring you the latest release of the Auvenir platform. Read on to learn more about the exciting additions in our latest release 5.4.

What's in This Release:

✓ New Archive engagement feature

✓ New Quickbooks Online integration

✓ New enhancements to client portal

Archive Engagements

The Skinny:

Your completed engagement files can be locked down with archive to prevent further editing of the file after a specified date. Generate a downloadable PDF archive package for easy file management.

Features:

- Use a quick two-step request/approval process for archiving completed engagements:
    1) Any engagement team member can submit an engagement file for archive
    2) Engagement owners will approve the engagement archive request

- Keep track of all archived engagements under their own tab on your portfolio view.

- Archived files can still be opened in read-only mode inside Auvenir but edit features will be disabled.

- Request an archive package from the system and receive a downloadable PDF of your engagement for storage and post engagement file management.

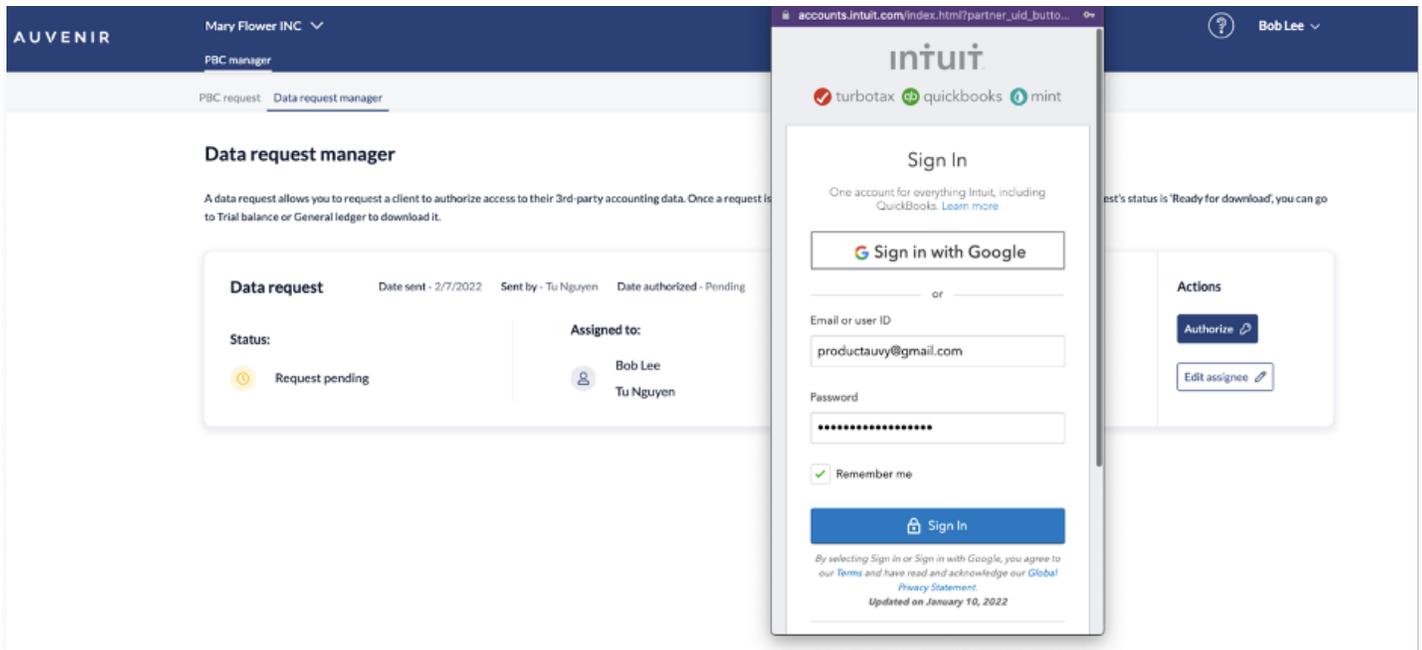Cont'd...

Quickbooks Online Integration

The Skinny:

Request authorization to pull client financial data directly from Quickbooks Online.

Features:

- Use our new integration to seamlessly bring in your client's financials from Quickbooks Online.

- Make a data request and have it approved by your client from inside the application.

- Use the "refresh data" option at any time to call on the most up-to-date data for use in the Trial Balance module within Auvenir.

- Clients and audit team members will receive a single daily email on all new or overdue data requests.

Cont'd...

Client Portal Enhancements

The Skinny:

You asked for it and Auvenir delivered, adding even more enhancements to the Client Portal. Do more with your clients such as uploading audio or video recordings directly into your engagement file.

Features:

- Auvenir now supports over 30 different file formats including .mp3, .mp4, and .wmv formats. Bring a variety of files into your engagement and never worry they won't display.

- Clients can assign data requests directly to internal team members improving the response time for the completion of tasks.

- New quick and easy sort features allow you to organize data requests just the way you want them.

Cont'd...

AUVENIR   PEG Audit for demo ∨   ⑦   Amy Yu ∨

Dashboard   Working papers   PBC manager   Trial balance   Summaries   Team   Files

PBC request   Data request manager

PBC manager

[Add request(s) ∨]   [Actions ∨]   **Filter**

☐	ID ↑⁼	Request description ⌄	Audit team	Client contact	Due date ⌄ ⓘ	Files		Comments ⌄	Status ⌄
						Auditor ⌄	Client ⌄		
☐	RQ001	Business process narratives or flowcharts or proced…	Amy Yu	Yue Yu	1/20/2022	📎 0	📎 0	💬 0	Ready for review
☐	RQ002	Bank statements for all bank accounts for Jan 1, 202…	Amy Yu		4/21/2022	📎 0	📎 0	💬 0	New
☐	RQ003	Please provide a detailed listing of all credit notes po…	Amy Yu	Yue Yu	1/29/2022	📎 4	📎 7	💬 1	Ready for review
☐	RQ004	Support for note disclosures	Amy Yu	Yue Yu	4/30/2022	📎 0	📎 0	💬 1	New
☐	RQ005	Trial balance as of Dec 31, 2020	Amy Yu		4/30/2022	📎 0	📎 0	💬 0	New
☐	RQ006	Financial statements for Dec 31, 2020	Amy Yu		3/31/2022	📎 0	📎 0	💬 0	New
☐	RQ007	Q4 2020 Internal reporting package	Amy Yu	Yue Yu	5/31/2022	📎 0	📎 0	💬 0	New