

AVII AT A GLANCE

The screenshot shows the Avii software interface with several callouts and annotations:

- 1. What's Next**: A callout pointing to the 'What's Next' section on the left sidebar. An annotation says: "Head back to your home workspace." Another annotation says: "View notifications, change settings." A URL <https://anders.avii.com> is shown in a dark box at the bottom left.
- 2. Documents**: A callout pointing to the 'Documents' section in the center.
- 3. Projects**: A callout pointing to the 'Projects' section on the right.
- 4. Team**: A callout pointing to the 'Team' section in the center.
- 5. Notifications**: A callout pointing to the 'Notifications' section on the right.
- 6. Discussions**: A callout pointing to the 'Discussions' section at the bottom.

Additional annotations include: "Part of multiple client teams? Change clients by clicking here!" pointing to the 'CHANGE CLIENT' button, and "Season The Client Coolly Anders CPAs + Advisors" in the top right corner.

- 1. What's Next**— A summary of all activity: Added projects, document requests, discussions, etc. Click on individual items to view.
- 2. Documents**— Access submitted documents.
- 3. Projects**— A list of all projects. Click on a project to go to the project workspace to submit documents and more.
- 4. Team**— A list of all people on the team: Anders members and your members.
- 5. Notifications**— Activity notifications: new document requests, discussions, etc.
- 6. Discussions**— View or start discussions with Anders and/or your team members: general, project or document related.