

# AVII USER GUIDE

## WELCOME TO AVII

Avii is the new client experience tool for Anders clients. This secure, collaborative workspace will be your go-to hub for collaborating with your team of Anders advisors. Through Avii, you can view requested documentation and easily upload and download documents while seeing real-time questions and comments from your advisors.

This guide provides helpful tutorials and information for getting started on the platform.

## TABLE OF CONTENTS

LOG IN .....	2
USE YOUR DASHBOARD .....	3
USE YOUR WORKSPACE .....	4
SIGN USER AGREEMENT .....	5
CHECK NOTIFICATIONS / DISCUSSIONS .....	6,7
SUBMIT DOCUMENTS .....	7
ADD SOMEONE TO YOUR TEAM .....	8
NEED HELP .....	8

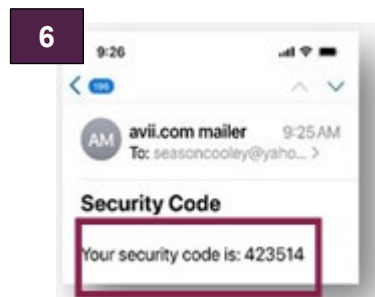


## Remember Anders “Three Minutes” Rule

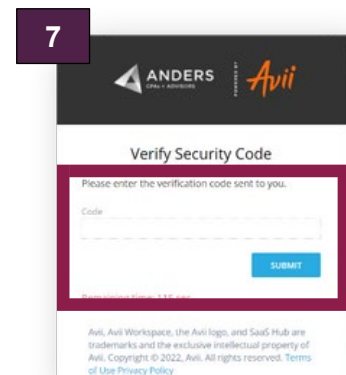
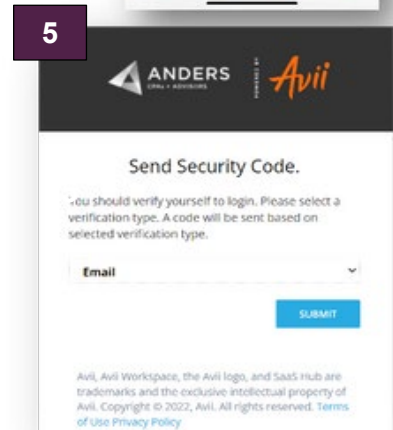
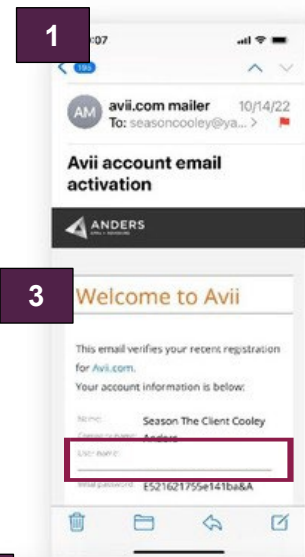
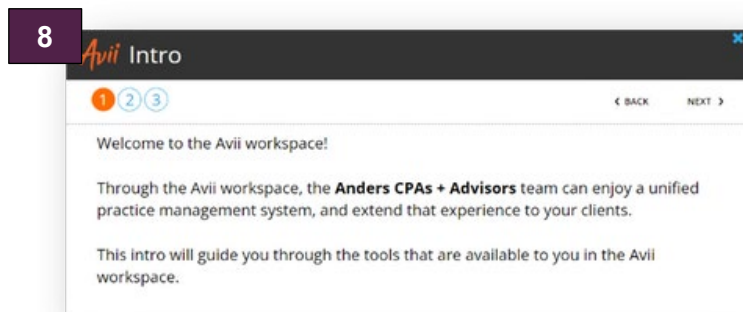
If it takes you longer than “Three Minutes” to do something in Avii...Call the Anders Client Engagement Specialist Hotline @ 314-655-0161 and/or Email: [clientengagement@anderscpa.com](mailto:clientengagement@anderscpa.com)

## LOG IN

1. You will receive an activation email from **avii.com mailer** titled - **Avii account email activation**.
2. Click the link in the email to verify your email address as directed.
3. Log in to Avii using the email address the activation email was sent to and the **Initial password** found in the email.
4. Change your password. Your password must include:
  - At least 10 characters
  - Upper and lowercase letters
  - A number
  - A special character
5. The next time you log in to Avii, and each subsequent time, you will need to use two-factor authentication. After entering your email and password, you will see the **Send Security Code** screen. Click **SUBMIT**.
6. You will receive an email containing a code.

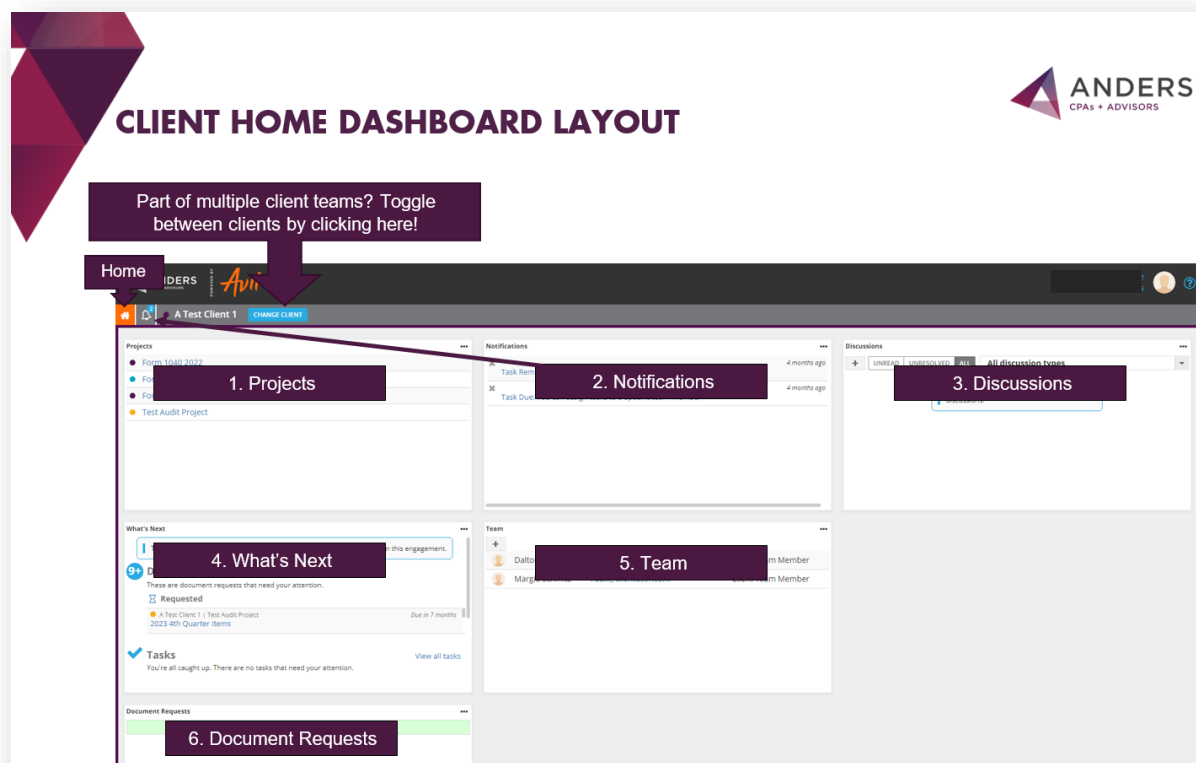


7. Enter that code into the **Verify Security Code** screen and click **SUBMIT**.
8. On your first log in, you will view welcome screens where you are able to learn more about Avii.



## USE YOUR DASHBOARD

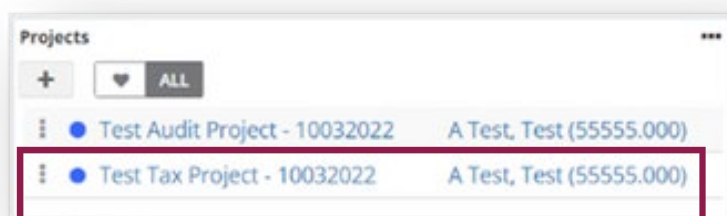
After you log in to Avii and choose a client (if you are part of multiple client teams) you will land on the Avii Dashboard:



The Avii Dashboard features a set of tools, each contained in their own box. Tools include:

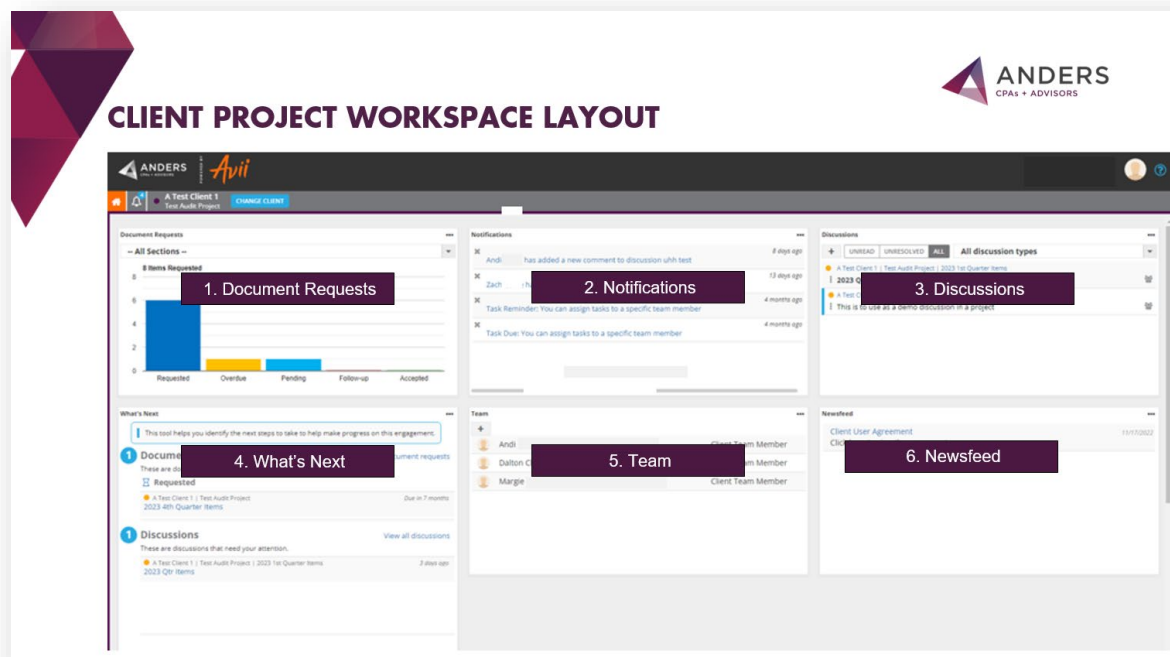
- 1. Projects**— A list of all projects the Anders team is working on. Click on a project to go to the project workspace to submit documents and more.
- 2. Notifications**— Activity notifications: new requests, discussions, etc.
- 3. Discussions**— View or start discussions: general, project or document related.
- 4. What's Next**— A summary of all activity: Added projects, document requests, discussions, etc. Click on an item to view it.
- 5. Team**— The people on your team: Anders members and your members.
- 6. Document Requests**— Access to request lists and review of submitted documents.

**Ready to begin...** Click on your active project from the Projects tool.



## USE YOUR WORKSPACE

After you have selected a Project, you will land on the Avii Project Workspace:






The Avii Workspace features a set of tools, each contained in their own box.

Tools include:

- 1. Document Requests**— Access to request lists and review of submitted documents for the project.
- 2. Notifications**— Activity notifications: new requests, discussions, etc.
- 3. Discussions**— View or start discussions: project or document related.
- 4. What's Next**— A summary activity related to the project: document requests, discussions, etc. Click on an item to view it.
- 5. Team**— The people on your team: Anders members and your members.
- 6. Newsfeed**— Complete your Client User Agreement and view updates and information.

### Tool Tips:

- Tools are refreshed individually. To do so, click the **Refresh** button  found at the top right of the tool.
- To open a tool in its own window, hover over it and click the **Maximize**  button at the top right of the tool, or double click the gray header.
- As the activation email mentions, you may want to bookmark <https://anders.avii.com> for the future.
- To return to your main workspace, click the **Go to the main Avii** workspace button at the top left of your screen.
- Avii workspaces are customizable. You can drag, drop, and resize tools to your preference.
- To resize tools, hover over any corner of a tool until you see a double-sided arrow, then click resize.
- To move a tool, click and hold in the gray header and then drag the tool where you want it.
- To Go back to the main Avii Dashboard click HOME  at the top left of your screen.

## SIGN USER AGREEMENT

To fully understand how Anders protects the information in Avii, please follow the information below to read and sign the Client Experience Workspace User Agreement.

1. To begin, click on a project from the **Projects** tool.

**Note:** Each user needs to do this once. If you have multiple clients and projects, selecting any project from any client workspace and completing these steps will suffice.

2. Once you arrive at a project workspace, locate the **Newsfeed** tool. Then click on **Client User Agreement**.

3. After clicking the link you will arrive on a form. Enter **Your Name** and **Your Email** address as indicated click **BEGIN SIGNING**.

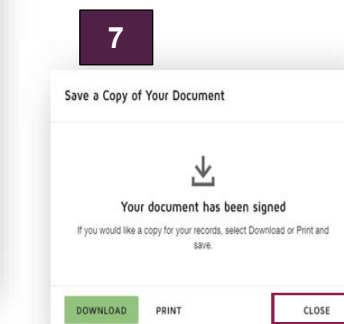
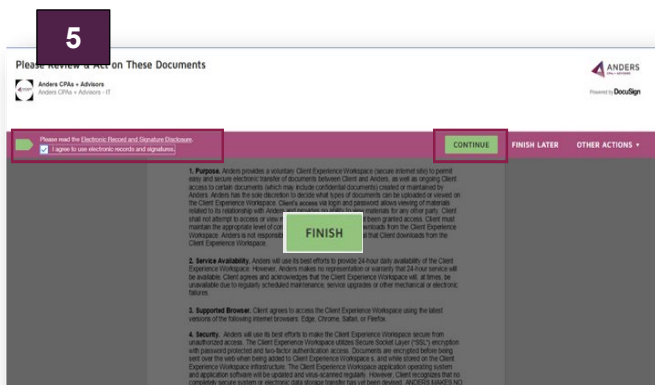
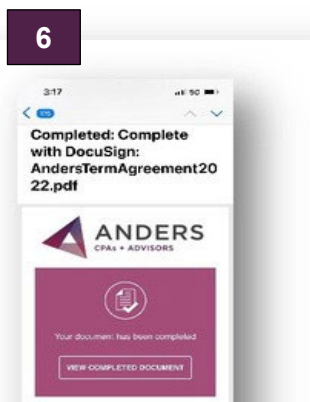
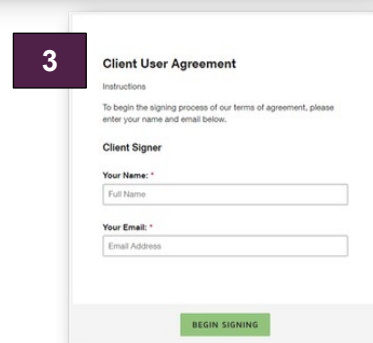
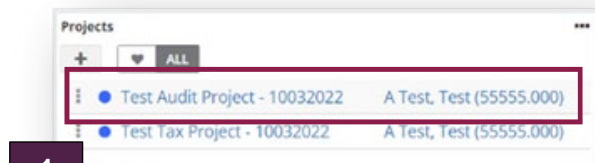
4. On the next page, select **I agree to use electronic records and signatures**.

- To review and sign the agreement, click **CONTINUE** at the top right of the screen. Review the document. At the bottom of the Document, click **Sign** in the **Signature** field to sign the agreement.
- In the **PLEASE LIST CLIENT ENTITIES & AFFILIATES** box, please list all entities you are signing the agreement for. To finish, click on **FINISH** at the bottom of the page.

5. After clicking **FINISH** you may **DOWNLOAD** or **PRINT** the document. You will automatically receive an email that includes an attachment of the signed agreement and a link to view the agreement online.


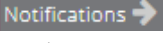
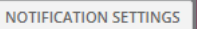
6. Confirmation appears you have **Completed with DocuSign: Anders Term Agreement**

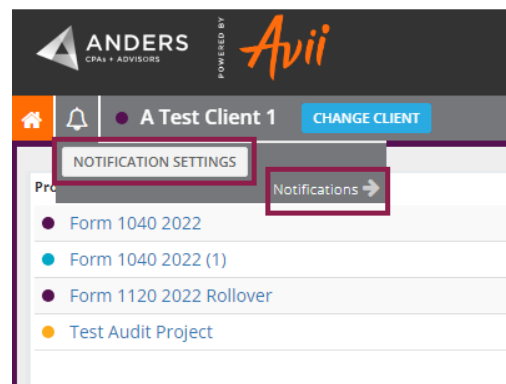
7. Click **CLOSE**.



## CHECK NOTIFICATIONS

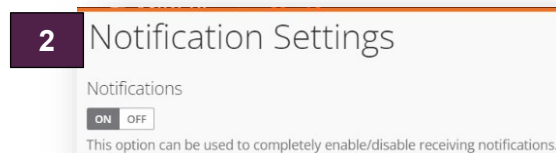
You can view Avii notifications in one of two ways:


1. In the **Notifications** tool in your workspace, click the bell  at the top left of your screen. When you have notifications, the bell shakes from side to side and a blue number indicates the number of notifications.
  - To view **notifications** from the bell, hover over it. Whether from the tool or bell, click on a notification to be taken to the related area of action or clicking **Notifications**  found at the bottom right of the window that appears to access the full notifications tool.
  - You can configure Avii to send you notifications based on a variety of activities. Please hover over the bell and then click on the **Change notification settings** button **NOTIFICATION SETTINGS**  found at the top left of the window that appears.

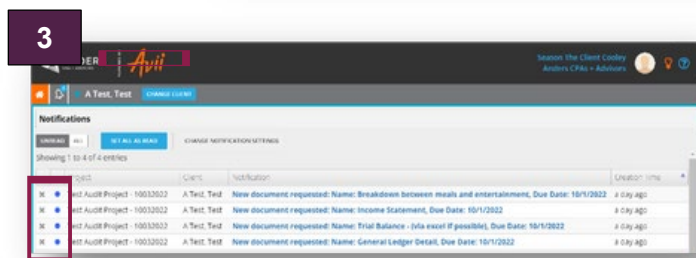


2. In the notification settings, you can:

- Completely enable/disable receiving notifications. (**Not recommended**)
- Choose whether notifications are delivered in the app, via email, text message, or a combination of any of those methods.
- Set notifications for activities: discussions, tasks, documents, document requests, teams, etc. Then click **Save**.



3. The bell  will continue to shake and display a number even after you have clicked on notifications until you mark them as read. To do so, maximize the Notifications tool and either clear notifications one-by-one by clicking the x next to them or click on the **SET ALL AS READ**.

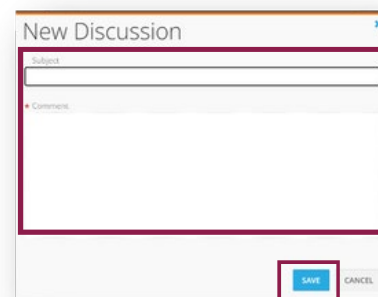


## DISCUSSION TOOL

You are able to message the entire team by using the discussion tools directly on the platform or when you are in the document request list you can add a discussion by clicking on the chat **Discussion** “bubble” to the right like shown below. Use the **Discussions** tool on your main workspace to communicate about general topics. Add a new discussion by clicking on the **New Discussion** button from the tool.

There are two fields to fill out:

- **Subject**— Enter a subject name to identify the nature or purpose for the discussion. This helps to differentiate among multiple discussions that may take place on the same item (document, task, etc.)
- **Comment**— The first post in the new discussion. Then click **Save**.

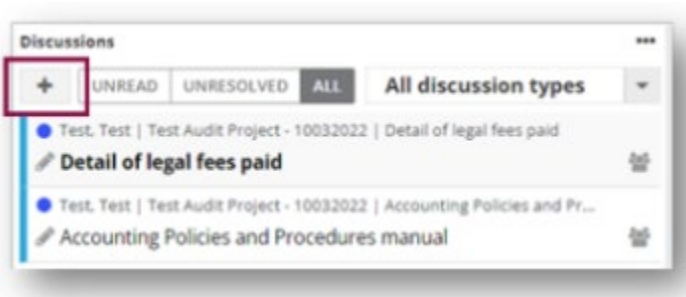


## DISCUSSION TOOL (continued)

You can start discussions on your main workspace, in a project, or about a single document request.



All discussions in Avii roll up to the Discussion Tool on your main workspace. You can set your individual notification settings for discussions in the **Notifications** tool.



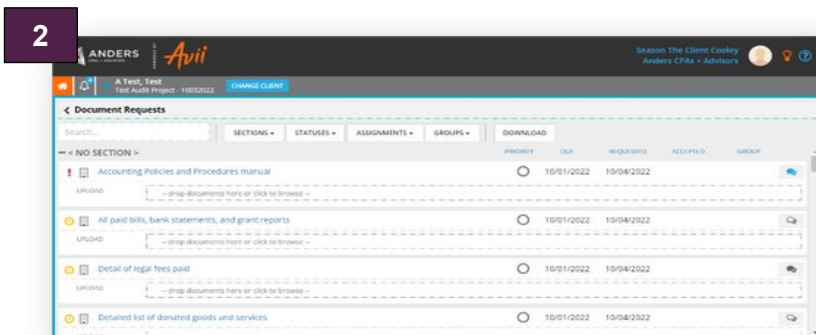
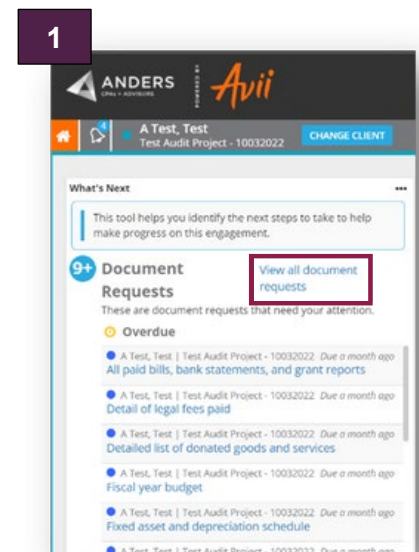
## SUBMIT DOCUMENTS

There are several ways to view document requests and submit documents:

1. To view a single document request, click on a request from the **What's Next** tool.
2. To view all document requests for a project:
  - Click on a project from the **Projects** tool and in the project workspace that opens, click on **View all document requests** from **What's Next**.
  - Click on a project from the **Projects** tool and in the project workspace that opens, double-click the **Document Requests** tool header.

Next, locate the document request you want to submit a document and “drag and drop” your documents into the submission area or “click to browse” and upload them. Your documents are now submitted.

At the top of documents requests, you can filter by status or assignment.



## ADD SOMEONE TO YOUR TEAM

To add someone to your team so they can submit documents:

1. From the **Team** tool on your client homepage or a project home page, click the **Add Team Member** button. In the window that appears, click into the **Click to select** field. On the next window, click **+ CLIENT USER**.

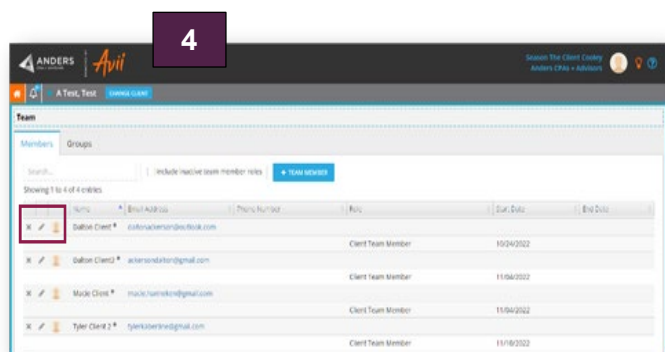
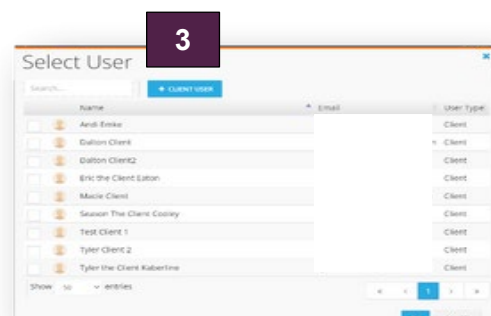
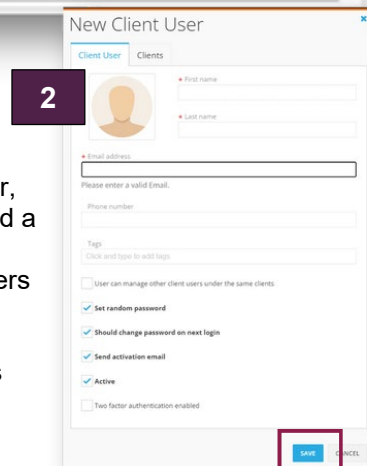
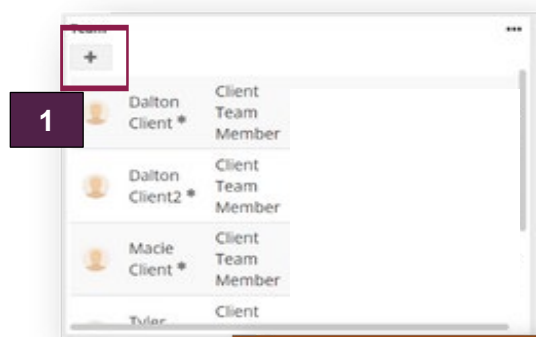
2. Complete the required fields on the **New Client User** window that opens: **First Name**, **Last Name** and **Email address**. Please leave the action items already checked.

These include:

- **Set random password**— Avii will assign a random password for the user for the first time they log into Avii.
- **Should change password on next login**— The user is required to change their password the first time they log into Avii.
- **Send activation email**— Avii will send a welcome email to the new user, inviting them to use Avii. The email will include the **Initial password** and a link to Avii.
- **Active**— The user is able to access the Avii for projects they are members of.
- When unchecked, users are deactivated and their access to Avii is suspended. If you want the user to be able to add people to the team as well, select **User can manage other client users under the same clients**.

3. When you are finished entering the required information, click **SAVE**. Click the **X** at the top right of the window to close. You may need to refresh the **Team** tool for the newly added client user to appear.

4. When there is a user that you no longer want to have access to a project or account, **Maximize** the team tool and click the **Remove** team member button. Alternatively, you can set an **End date** for the user by clicking the **Edit Team Member** button, selecting an End date, and clicking **Save**.



## GET HELP

For help with Avii, please contact your Anders advisor or the Avii support team at [aviisupport@anderscpa.com](mailto:aviisupport@anderscpa.com) or (314) 655-0161