

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.

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	Portfolio						Search	Q
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	Engagement	Entity	Engagement owner	Period end date	Status	Archive package	Date package created	Last downloaded
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	Aaron Corp Limited	Aaron Corp L	Patrick McNeill	2/28/2022	Ready to decrypt	Archive Aaron Corp		3/1/2022

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.

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			Pixary Statement. Updated on January 10, 2022			

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.

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