AVII WORKSPACE SOLUTIONS

CHOOSE ONE CORE SOLUTION

OPTIONAL ADD-ONS

CORE

- Client Workspace + Portal
- Employee Workspace + Portal
- Document Organization & Exchange
- Document Storage on Avii or Document Storage Integrations with 3rd Party Storage
- Project Management

ENHANCED CORE

ALL AVII CORE FEATURES, PLUS:

- Advanced Project Management + Automated Pools
- Tasks & Notes
- Communications
- Template System
- Document Routing
- Newsfeeds
- Customer Satisfaction Surveys
- Advanced Tech Toolbox *(SSO, API, Data Warehouse, Web Hooks, Custom Fields)*

Automation Add-on

- Advanced Automation System
- Process Management
- Workflow Management
- Resource Management

Financials Add-on

- Time, Hours & Invoice Tracking
- Budget Management
- Performance Reporting

PRACTITIONER & MANAGER EXPERIENCE — Product Features	CORE $20*	ENHANCED CORE $35*	Automation Add-on $35*	Financials Add-on $30*
Client Management	✓	✓		
Client Snapshot		✓		
Client Workspace Management	✓	✓		
Document Request Lists & Templates		✓		
Document Organization and Exchange	✓	✓		
Document Routing		✓		
Document Annotations	✓	✓		
Automated Doc Sorting & Organization	✓	✓		
Advanced Workflow Designer & Dashboard			✓	
Discussions - Internal		✓		
Discussions - Client		✓		
Project Management	✓	✓		
Project Queue (Pool)		✓		
Project Analysis			✓	
Bulk Project Adjustments			✓	
Project Rollover Manager			✓	
Deliverables & Extensions Management			✓	
Quality Control Tools			✓	
Project Status Tool		✓		
Sign Offs & Approvals			✓	
Tasks		✓		

*Per firm user, per month. No fee for customer users.

AVII WORKSPACE SOLUTIONS

	CHOOSE ONE CORE SOLUTION		OPTIONAL ADD-ONS	
	CORE	**ENHANCED CORE**	**Automation Add-on**	**Financials Add-on**
PRACTITIONER CONTINUED — Product Features				
Templates		✓	✓ (ADDITIONAL OPTIONS)	
Deliverables			✓	
Time Keeper				✓
Timecard Entry & Reporting				✓
Roles & Competencies Management	✓	✓		
Notification Mgmt *(Dashboard, Email & SMS)*	✓	✓		
Notes		✓		
Audit Procedures		✓		
Invoice & Payment Dashboard				✓
Calendar *(with Outlook integration)*		✓		
Resource Schedule Forecasting				✓
Opportunity & Proposal Management				✓
Sales Pipeline Forecasting				✓
Newsfeed		✓		
Quicklinks		✓		
Milestones			✓	
Performance Reports				✓
Resource Cost Forecasting				✓
Expense Tracking				✓
Visual Dashboard & Analytics	✓	✓		
CLIENT EXPERIENCE				
Client Portal & Workspace	✓	✓		
Secure Document Uploads	✓	✓		
Client Document Management	✓	✓		
Invoice & Payment Dashboard				✓
Client Projects	✓	✓		
Live Project Status	✓	✓		
Project Status Tool		✓		

AVII WORKSPACE SOLUTIONS

		CHOOSE ONE CORE SOLUTION			OPTIONAL ADD-ONS	
		CORE	**ENHANCED CORE**	+	**Automation Add-on**	**Financials Add-on**
CLIENT CONTINUED	Product Features					
	Client Discussions		✓			
	Notification Mgmt *(Dashboard, Email & SMS)*	✓	✓			
	Task Management		✓			
	Notes		✓			
	Client Team Management	✓	✓			
	Client Quicklinks		✓			
	Customer Satisfaction Tool		✓			
ADMINISTRATION	Single Sign-On		✓			
	API		✓			
	Data Warehouse		✓			
	Web Hooks		✓			
	Role-based Security	✓	✓			
	Custom Fields		✓			
	Activity Codes		✓			
	Tag Management	✓	✓			
	White-Labeling	✓	✓			
DOCUMENT STORAGE	Automations with Document Storage on Microsoft Sharepoint® or Box®	✓	✓			
	Document Storage on Avii	✓ INCLUDES 3 GB PER USER *$0.25/GB per month for usage of >3GB per user*	✓ INCLUDES 3 GB PER USER *$0.25/GB per month for usage of >3GB per user*			