



In Contact

Hassle-free query submission
and resolution for audit and
accounting professionals



Contents

- **The need for In Contact**
- **In Contact**
 - At a glance
 - The webapp (End-to-end)
 - Key benefits
- **readyplatform** - The enabling environment
- **About 2Digital Solutions**
- **Contact Us**

Digitally drive the process ..

... of submitting, tracking and resolving queries from audit and accounting professionals whilst building an audit trail that will satisfy the Regulators



About Us

We build and host digital products and solutions at the forefront of technology to enable measurable and practical digital transformation for our clients.



The need

An affordable solution that drives the resolution of queries submitted by audit and accounting professionals

Query management or support ticket systems are fairly common and well-known thanks to the efforts of many IT service companies and departments. These system are usually available off-the-shelf or easily implementable through a SaaS provider. However, few – if any – are tailored or even customizable to meet the specific demands of a professional support team providing services to audit and accounting professionals.

Therefore, many firms still use email, spreadsheets or even simple telephone calls to help professional services teams make crucial decisions about the correct accounting or audit treatments when working with their clients.

Under these conditions, it is difficult to ensure that:

- Queries raised by the professional teams are effectively work-flowed to conclusion whilst including appropriate professionals for input, review and approval
- All the considerations that were raised in resolving the query (and hence the audit opinion) have been documented – forming an effective audit trail that would satisfy Regulators performing reviews of past audits
- Build a knowledge base of past queries that would aid in the timely resolution of queries in future
- Identify where bottlenecks are arising in the resolution of queries

A group of five business professionals (three men and two women) are gathered around a table in a modern office setting, looking at a document together. They are dressed in professional attire. The background shows large windows with a view of greenery outside.

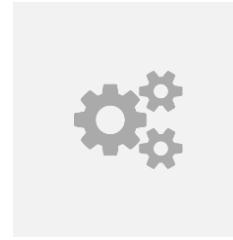
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Built for professionals by professionals who know what you need to deliver effective support to your audit and accounting teams



At a glance ...

Built and hosted on our revolutionary flagship digital platform - *readyplatform*



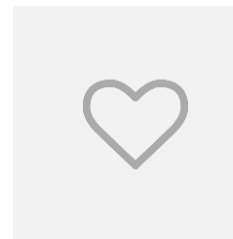
Configurable

- The highly configurable nature of the system makes it possible to tailor it to your exact specifications by adding your own topics, sub-topics, selection lists and more...



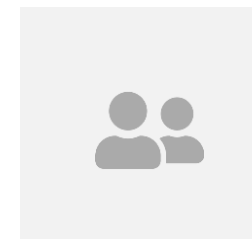
Online reporting

- Summary dashboard reports
- Detailed reporting
- Even deliverables to add to the audit file



Easy to use

- Intuitive and friendly interface
- Attach and manage documents



Collaborate

- Alerts, notifications and reminders keep everybody informed

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Users can quickly and easily submit queries using the intuitive interface

The image shows a software interface for submitting queries. It is divided into two main sections: 'Query Profile' and 'Submit a Query'.

Query Profile:

- Header:** 'Query Profile' (red bar) with a 'Help' button.
- Query Category:** 'Audit and Assurance'. A note states: 'This query relates to the client's financial year ending' followed by a date field 'yyyy/n' with calendar icons. A red note below says 'This field is mandatory'.
- Type of Query:** 'Mandatory Consultation'. A dropdown menu is set to 'Auditing Standard' with a note 'Option not listed'. A red note below says 'This field is mandatory'.
- Type of Consultation:** 'Companies Act'. A dropdown menu is set to 'Accounting Standard' with a note 'Option not listed'. A red note below says 'This field is mandatory'.
- Query Status:** 'Draft - Not submitted'. A 'Save Draft' button is visible.

Submit a Query:

- Header:** 'Submit a Query' with a close button.
- Introductory Text:** 'The next few screens will guide you through the process of providing all the information we need to resolve your query. If we need more information from you later, you will be able to add this using the chat feature or through uploading additional documents. To get started, please answer a few key questions ...'
- Form Fields:**
 - 'What category of query do you wish to submit?': Dropdown menu with 'Audit and Assurance' selected.
 - 'What type of query are you creating?': Dropdown menu with 'Mandatory Consultation' selected.
 - 'What type of consultation do you need?': Dropdown menu with 'Companies Act' selected. A list of options is shown below the dropdown: 'Companies Act', 'Corporate governance', 'Data and analytics', 'Emphasis of Matter', 'Going Concern', 'Interfirm Modified Reports'.
- Buttons:** 'Close' and 'Begin' buttons are visible at the bottom of the modal.

Client Details - 123 Main Street:

- Message:** 'If this client is part of a group of companies (and particularly if this is a going concern consultation), please provide the query numbers of the other group entities you refer to these when carrying out our review. (Please use the Reference No field in the card at the top of this page to record those details)'
- Fields:**
 - Ultimate Parent Company:** SEC
 - Listing of Equity Instruments:** SEC
 - Client Country:** Mauritius
 - Listing of Listed Debt Instruments:** None
 - Client Industry:** construction
 - Accounting Framework(s):** US GAAP

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Packed full of additional features

- Submit by proxy lets you submit a query on behalf of any other user
- Discussion forum integrated to the query lets you discuss matters related to it
- Match queries to previous matters
- Gather feedback from teams and DPP operators to improve performance
- Integrated with an Incident Management Log so you can automatically raise incidents that should be tracked and reported out of the query resolution process

The screenshot displays a web application interface for query management. At the top, a navigation bar includes tabs for 'Query Details', 'Documents', 'Additional User Actions', 'Discussion', 'Review Notes', 'Deliverables/Resolution', and 'Activity Log'. A green status bar on the right indicates 'Query Status : In Progress'. Below the navigation, a section titled 'Details of previous consultation' is highlighted with a yellow box. The main content area is divided into two columns. The left column, titled 'Query Profile', contains the following information: 'Requestor Name' (Eugene Pfister), 'Query Category' (Accounting), 'Type of Query' (Non-Mandatory Consultation), and 'Type of Consultation'. Below this are two buttons: 'Change Query Type' and 'Change query owner'. The right column contains a 'Short Description' field with the text 'Non-Mandatory', followed by two radio button questions: 'Is this potentially a prior period error?' (Yes/No) and 'Do you require a budget from DPP Accounting prior to commencement?' (Yes/No). A checkbox at the bottom of this column is checked and labeled 'These selections are confirmed as correct by DPP'. On the far right, a 'Reference Number' (Q-0020) and 'Submitted' date (12 Sep 2020) are shown. A 'View Incident' button is highlighted with a yellow box. At the bottom right, the 'Expected Resolution Date' is shown as 2020/09/21.

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Responsible and accountable parties are automatically informed and can manage the finding and actions on one, easy-to-use interface – the Finding Detail Screen

- Findings owner can
 - Revert to audit (if in disagreement with the finding)
 - Record management comments
 - Accept the finding
 - Add remedial actions and assign accountability
- Action owners can use the finding detail screen to update status of actions
- Department / Function head can approve the finding

The integrated messaging and alerts engine ensures that all stakeholders are kept informed as actions are taken against the finding

The screenshot displays the 'Management Comments' section of the Finding Detail Screen. At the top right, a note states: 'Only the finding owner can accept this finding or revert back to audit'. Below this is an 'Add Comment' button and a search input field. A table lists one comment: 'Management have agreed to implement formal controls in this environment going forward.' The table has columns for 'Comment', 'Owner', and 'Actions'. The 'Owner' column shows a blue bar, and the 'Actions' column shows a green checkmark and a red delete icon. Below the table, it says 'Showing 1 to 1 of 1 entries' and 'Show 10 entries'. There are 'Previous', '1', and 'Next' navigation buttons, and 'Copy', 'CSV', 'Excel', and 'Print' action buttons.

The 'Actions planned to address this finding' section is visible below, with an 'Add Action' button and a search input field. A note at the top right of this section reads: 'Only the action owner or an administrator can edit/delete a finding action'.

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Add documents that support the finding or that evidence the completion of remedial actions

- The auditors / reviewers can easily upload documents and attach these to the finding
- Owners of remedial actions can upload documents that evidence the resolution of the actions that they are accountable for

Documents related to this finding

Attach any relevant supporting documents (avoiding personally identifiable information where possible)

[Upload Document](#)

Document Name	Description	Added By	Date
Document 1	Added to support the finding	Eugene Pfister	14
Document 2	Add by remedial action owner	Eugene Pfister	14

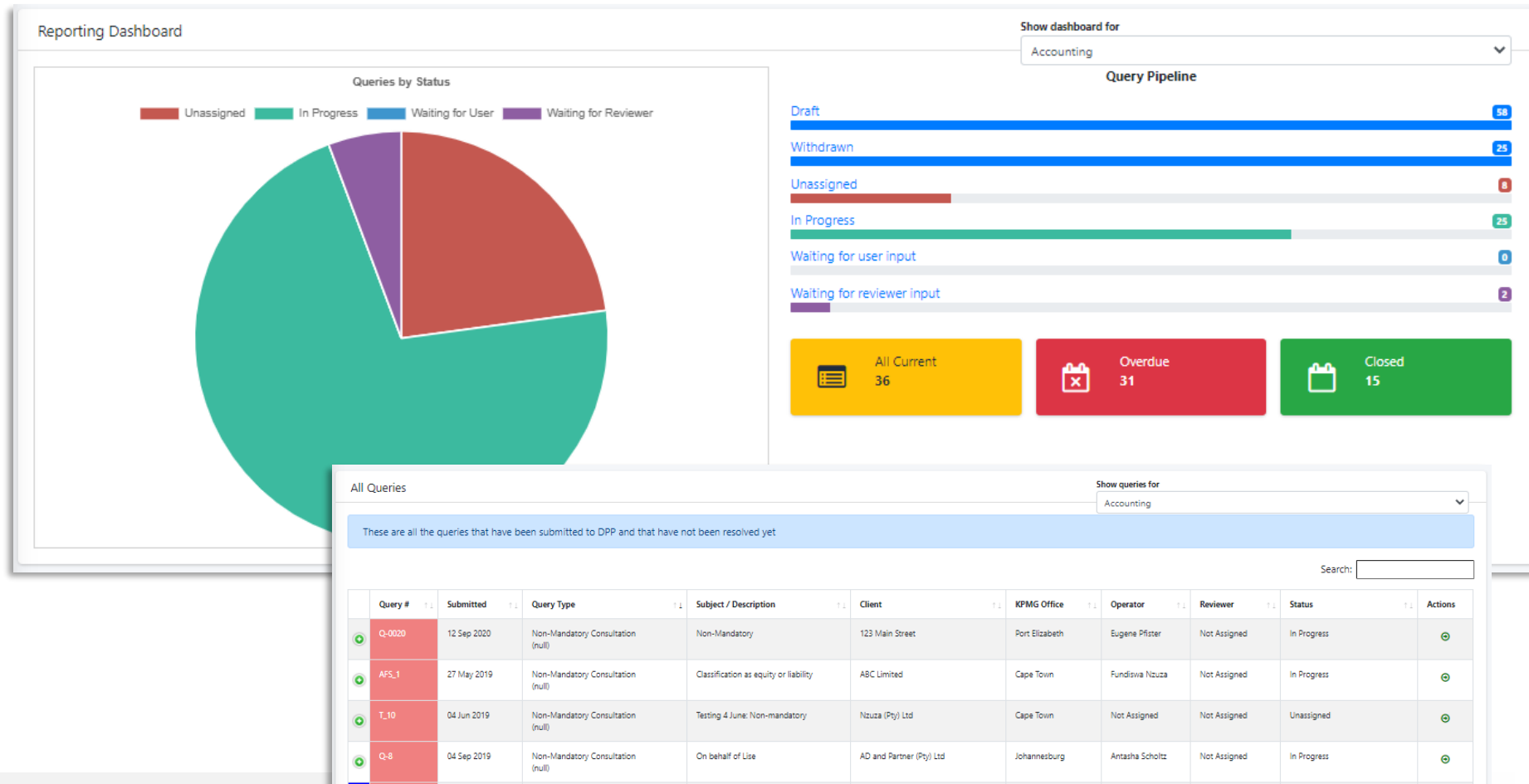
Showing 1 to 2 of 2 entries
Show entries

In Contact

Detailed reports and summary dashboards provide all the information you effectively track all queries to resolution

Dashboards are available at the requestor, operator, reviewer and organisational level.

Reporting is produced based on the role of the person viewing the report (i.e. Partner, Manager, EQCR, Operator, Reviewer, etc)

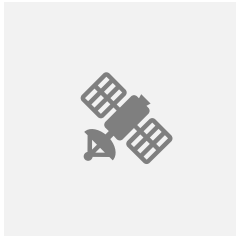


readyplatform

Tapping into the capabilities of our always-on, digital platform, we will help you reinvent your business processes, provide an intuitive interface and enable key analytic reporting to help you get the best out of your business processes

readyplatform at a glance

A digital delivery platform providing the ecosystem needed to rapidly build, deploy and host digital products and solutions to help businesses innovate and digitise at unprecedented rates



Always On

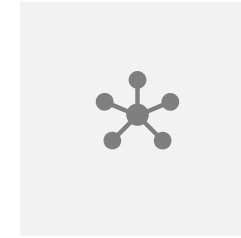
readyplatform lives in the cloud. This means that you can access your data and applications at any time from anywhere in the world

Perform assessments and analyse results when it suits you from wherever!



Detailed Logging

... and user tracking, combined with digital signatures, mean that you can track and trace all actions performed by you and your employees



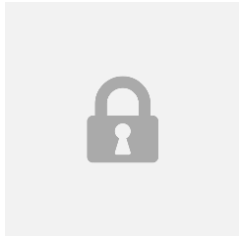
Drive innovation

Utilising our flexible architecture means that we can help you launch your own digital solutions quickly and at much reduced cost over traditional development methods

You're not tied just to Finding Manager. We can leverage our platform to provision or build out any solution you may need

readyplatform security

Built to the strictest security standards, you have peace of mind knowing that your data and applications are kept in a secure environment and that it is managed in compliance with data protection regulations



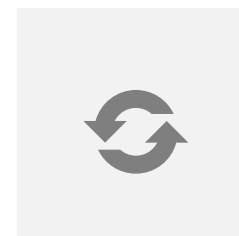
Data Protection

readyplatform uses a secure protocol (HTTPS) for keeping all data encrypted when shared between your platform and a user's browser. No data can be shared with third-party entities without your explicit consent. When at rest (in a database), your data is encrypted too, providing an additional strong layer of protection.



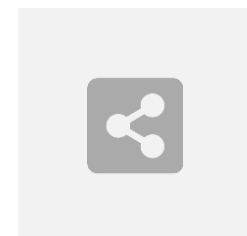
Security Practices

readyplatform is built on a safety-first basis to follow best practices and comply with the latest security guidelines. These include OWASP's recommendations for secure application development. Independent third-party penetration tests are regularly performed on all our products and infrastructure to identify and confront any current vulnerabilities.



Data Redundancy

Your data requires the highest degree of protection with no room for compromise. Our fully-managed cloud deployment offers multiple levels of data redundancy both at infrastructure and application level.



Solid Infrastructure

Our virtual cloud services use world-class infrastructure providers like Microsoft for your system's efficiency, safety and round-the-clock accessibility. Our providers are just as reliable and are highly qualified and equipped with the latest security-related certificates to offer first-class services.



practical

*/ 'praktɪk(ə)l/
adjective*

of or concerned with the actual doing or use of something rather than with the theory and ideas

2Digital Solutions

We build and host digital products and solutions at the forefront of technology to enable measurable and practical digital transformation for our clients

2Digital Solutions at a glance

Established in 2016

South African Registered
2016/268563/07

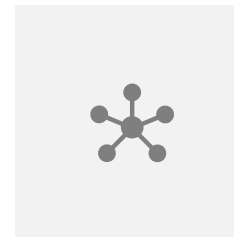
VAT Registered
4280276199

Our core team has over 40 years combined experience in IT development, IT consulting and IT assurance

Our extended team of developers and professional consultants cover a variety of subject matters including financial, tax, audit and general advisory



We operate globally servicing our clients on every continent



Portfolio of Service Offerings

- Application Criticality Assessment Toolkit
- Bursary Management
- Case Management Solutions
- Declarations
- Document Collaborator
- Finding Manager
- Employee Mobility
- Help Desk Solution
- IFC Toolkit
- Polls
- Questionnaires
- Risk Manager
- Risk Management Query System
- Self Assessment Toolkit
- Staff Management
- Surveys
- Tax and Rebate Calculators




Major Clients





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