



## **In Contact**

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



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## 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

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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 large document. They are dressed in professional attire. The scene is lit with natural light from large windows in the background.

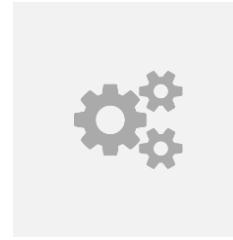
# In Contact

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*



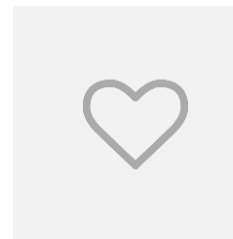
### Configurable

- 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...



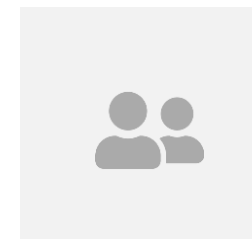
### Online reporting

- 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

# In Contact

Users can quickly and easily submit queries using the intuitive interface

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

**Query Profile** (Red header):

- Query Category:** Audit and Assurance
- Type of Query:** Mandatory Consultation
- Type of Consultation:** Companies Act
- Query Status:** Draft - Not submitted
- Buttons:** Help (blue), Save Draft (green)
- Form Fields:** A date field for 'This query relates to the client's financial year ending' with a calendar icon and 'yyyy/n' placeholder. Below it are two dropdown menus for 'Auditing Standard' and 'Accounting Standard', both with 'Option not listed' text and 'This field is mandatory' error messages.

**Submit a Query** (White header with 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:** Three dropdown menus for 'What category of query do you wish to submit?' (Audit and Assurance), 'What type of query are you creating?' (Mandatory Consultation), and 'What type of consultation do you need?' (Companies Act). Below the third dropdown is a text input field.
- Buttons:** Close (grey), Begin (blue with arrow)

**Client Details - 123 Main Street** (Green header):

- Instructional Text:** '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)'
- Table:**

<b>Ultimate Parent Company</b>	<b>Client Country</b>	<b>Client Industry</b>
SEC	Mauritius	construction
<b>Listing of Equity Instruments</b>	<b>Listing of Listed Debt Instruments</b>	<b>Accounting Framework(s)</b>
SEC	None	US GAAP

# In Contact

Add documents that support the query .... both as the requestor or as an operator working on the query

Documents

Upload any documents that you believe are relevant

[Upload Document](#)

Document Name	Document Type	Date Uploaded	Download
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Manage review notes and additional user actions from within the query itself

Query Details Documents Additional User Actions Discussion Review Notes Deliverables/Resolution Activity Log Query Status : In Progress

Review Notes

These review notes are only visible to the DPP Operator and Reviewer for this query  
Before closing the query, please make sure that all review notes are either deleted or marked as RESOLVED.  
Only the reviewer can delete a review note

[Send to Reviewer](#) [Delete all review notes](#)

Search:

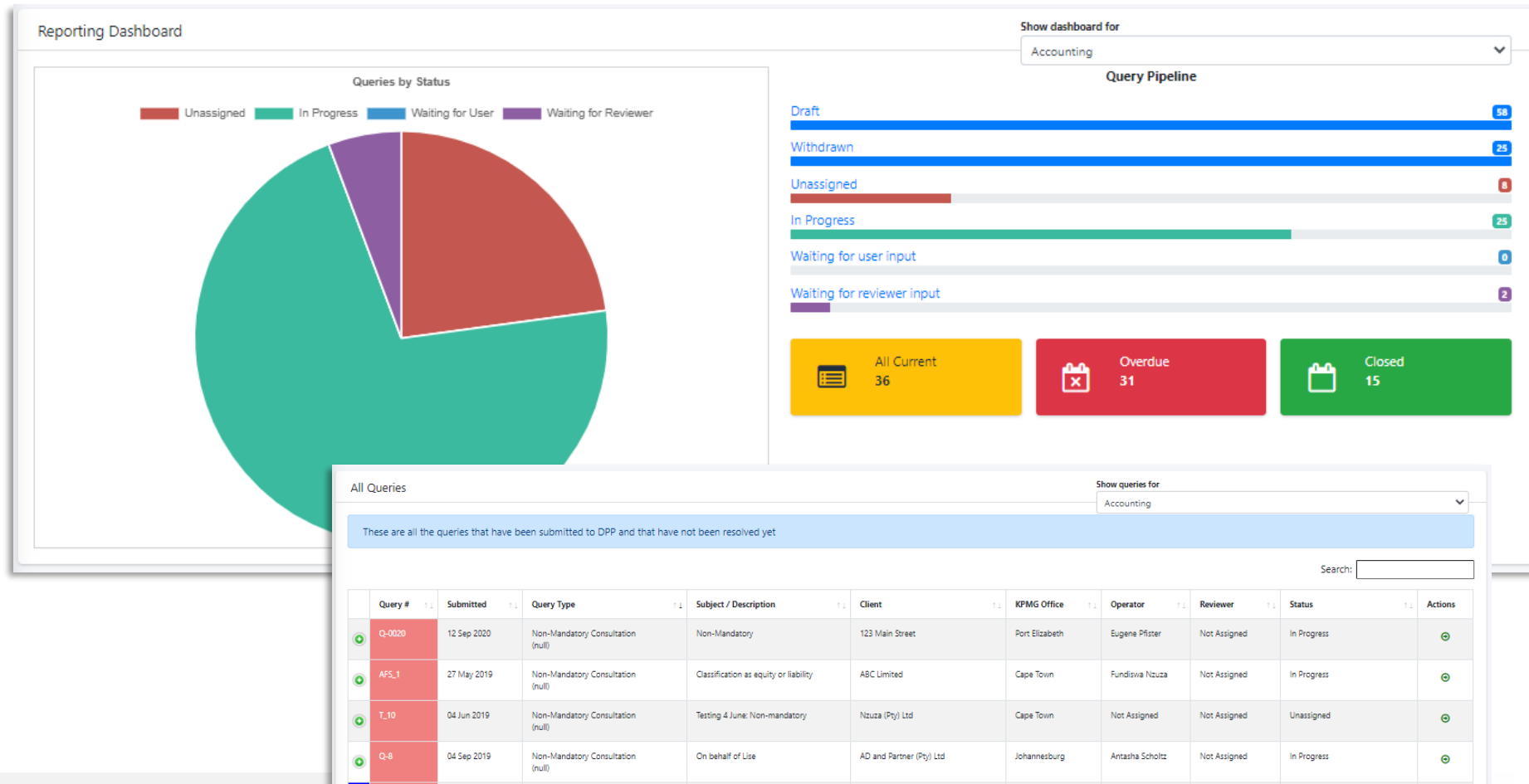
Date Created	Reviewer	Reviewer Comments	Operator Comments	Status	Action
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# In Contact

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)



# In Contact

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

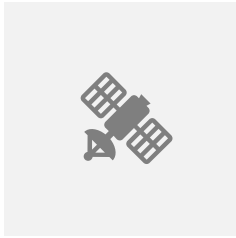
The screenshot displays a web interface for query management. At the top, a navigation bar includes tabs for 'Query Details', 'Documents', 'Additional User Actions', 'Discussion', 'Review Notes', 'Deliverables/Resolution', and 'Activity Log'. A green status bar on the right indicates 'Query Status : 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 questions: 'Is this potentially a prior period error?' (radio buttons for Yes and No, with No selected) and 'Do you require a budget from DPP Accounting prior to commencement?' (radio buttons for Yes and No, with No selected). 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' field shows 'Q-0020', and a 'Submitted' date of '12 Sep 2020'. Below this, the 'Assigned To' field shows 'Eugene Pfister' and the 'Reviewer' field is 'Not assigned'. At the bottom right, the 'Expected Resolution Date' is '2020/09/21'. A 'View Incident' button is highlighted with a yellow box in the top right corner of the main content area.

# *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

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

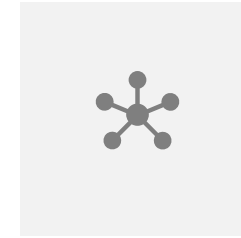
Perform assessments and analyse results when it suits you from wherever!



## Detailed Logging

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



## Drive innovation

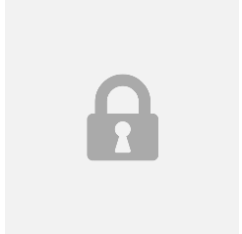
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Utilising our flexible architecture means that we can help you launch your own digital solutions quickly and at much reduced cost over traditional development methods

You're not tied just to In Contact. 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



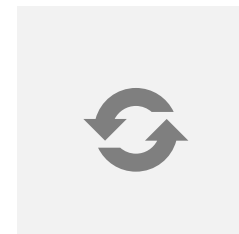
## Data Protection

*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.



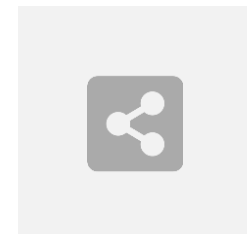
## Security Practices

*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

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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

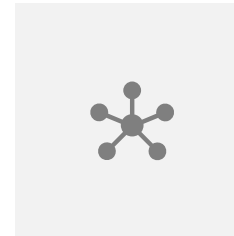
VAT Registered  
4280276199

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

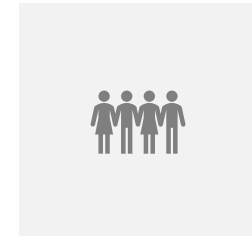


We operate globally servicing our clients on every continent



## 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






# Contact Us

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