# Fieldguide AI

## AI built for practitioners, by practitioners

Fieldguide AI provides a set of AI capabilities purpose-built for advisory firms. Fieldguide AI is a practitioner-centric AI, designed to enhance and automate the services that firms offer to their clients. It brings the magic of AI to team members as they write test plans, analyze evidence, and collaborate with clients. Fieldguide AI performs routine tasks, similar to a junior associate, in order to elevate and empower teams to engage more frequently with clients and think critically about client risks.
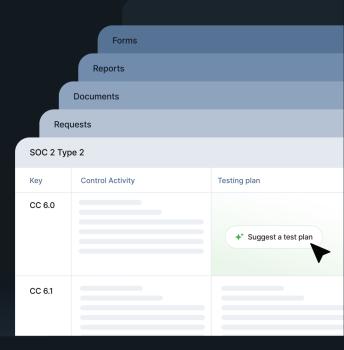
Top 500 firms trust Fieldguide to improve efficiency, revenue, and client experiences.

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Forms

Reports

Documents

Requests

**SOC 2 Type 2**

| Key | Control Activity | Testing plan |
|-----|------------------|--------------|
| CC 6.0 | | ✦ Suggest a test plan |
| CC 6.1 | | |

### Draft Control Tests and Requests

Fieldguide AI suggests requests and control tests based on identified control activities within an engagement. This facilitates quick and accurate identification of necessary tests, significantly streamlining the engagement process.

### Custom AI Actions

Firms can create firm-specific actions for a number of tasks and activities across the engagement lifecycle. For instance, staff members can utilize AI to automatically draft recommendations for any exceptions noted during an audit, review findings from previous years' engagements, or perform data validation across multiple sets of data. This not only streamlines engagement work but also ensures a consistent level of quality, regardless of who is performing the work.

### AI Document Copilot

Fieldguide provides automated review and recommendations for client documents, so staff members can more easily see if documents meet requirements for control activities. Staff members can also ask Fieldguide AI anything about a document to obtain additional insights. AI Document Copilot improves engagement quality by helping staff members of all experience levels to identify potential issues.
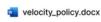
### Personalized Test Plans

Enable staff members to leverage AI to automatically generate test procedures that align with the firm's specific language and methodologies. For firms that outsource portions of their engagements, these personalized test plans eliminate potential miscommunications with clients, thereby enhancing the overall client experience.

## Award-winning AI built for advisory & audit

Fieldguide AI revolutionizes engagements by streamlining processes and empowering teams to work more strategically. By seamlessly integrating the latest AI innovations, Fieldguide AI enables firms to drastically reduce the workload associated with tests, requests, and document reviews, allowing staff members to focus on critical and higher-margin activities. Fieldguide AI enhances engagement quality, maximizes margins, and ensures staff retention, while leveraging professional expertise in the most productive and efficient manner.

Fieldguide is the category-defining AI Advisory & Audit Cloud that helps firms streamline the entire lifecycle of any engagement. A five-time industry award winner, Fieldguide has won multiple Accounting Today Top New Products Awards and CPA Practice Advisor Technology Innovation Awards. Fieldguide is backed by top venture capitalists such as 8VC, Y Combinator, and Floodgate. Visit fieldguide.io to learn more.

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