

Advisor Billing Application to Cater to Varying Enterprise Businesses



Hexaview



About Our Client

The client is a leading organization contributing to wealth management technology services based in the United States. They specialize in providing billing application for RIAs and financial advisors.

Location: U.S.

Size: Enterprise



About Hexaview

A digital transformation firm focused on providing Technology Consulting, Development Centre, Captive as a Service with an innovative approach and latest technology. With both financial and technology insights, Hexaview Technologies endeavors to provide secure, optimal, and quality solutions to your unique business requirements.

Area of Specialization: Salesforce, Big Data, AI & ML, Cloud Computing, Business Intelligence.

Our flagship Products: ReportWa, PDF Extractor, and Video Statements enable data visualization and automation in reporting as well as data extraction.

Time to Market

Resources: Project Manager, Quality Assurance Engineers, Back-end/Front-end Developers

Tenure: Working since 11 years

Client's Challenges

- The client experienced difficulties with the existing system as managing with increasing data and complicated calculation logic was troublesome.
- They wanted to automate their current Excel-based program and convert it into an efficient web-based application.

Hexaview's Solution

- Developed an AWS-based application, which multiple users can use simultaneously.
- Automated the whole calculation logic with a minimal user interface.
- Generation of properly formatted reports, which are easy to analyze and more accurate.

Impact

- Provided users with the ability to import data files from their PMS system.
- Enabled payout calculation at the relationship/household level for multiple payees.
- Enabled detailed and summary report generation at different payee levels.

Key Success Factors

- Our prior knowledge of working with Advisor Billing and experience in the wealth management domain helped develop a valuable product at less cost and time.
- Conducted regular pen tests to identify vulnerabilities and validate the security of infrastructure and application.



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ISO 9001 CERTIFIED



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