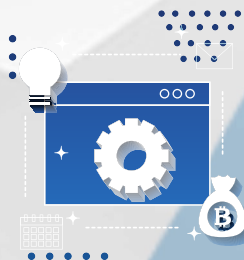


Improving Financial Advisors' Engagement via Salesforce



Hexaview



About Our Client

A wealth management software provider empowering investors with real-time portfolio reporting and insights. They specialize in data aggregation, analytics, and performance reporting.

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: 4 Developers, 2 Quality Engineers, 1 Project Manager, 1 Architect

Client's Challenges

- The client wants a component in Salesforce that can dynamically fetch financial data from their primary product using API callouts.
- The data should be displayed in that component so that an Advisor working in Salesforce need not move to their platform to access the data, they can just authorize themselves with their platform credentials in Salesforce and access the desired financial data.

Hexaview's Solution

- Hexaview developed a Salesforce Lightning Component that uses OAuth flow for Authorization.
- It uses the client's OAuth and Jobs APIs for user authorization & data fetching respectively.
- The lightning component is linked to the portal so that Financial Advisor can move to it in a jiffy.
- The component is highly customizable and flexible.

Impact

- The component is ready to display the financial data with a lot more configurations.
- By clicking the refresh button in the component, the Financial Advisor can make a new API callout & pull refreshed data from the client's primary product.

Key Success Factors

- Our agile business analysis and continuous communication with the client helped us a lot in meeting the client's expectations.



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