



# **Benefits & Differentiators**

### Domain

- Highly proficient in financed based projects
- Our Domain expertise enable us to suggest better solutions and execute the same technically

# **Custom Projects**

- Competitive Analysis
- Forecasting
- Interest Rate Risk Management
- Wealth Management
- Mutual Fund Platform
- Taxation and e-Filing
- Traffic Video Analytics
- Data Analytics & Visualizations through custom Dashboards
- Custom Excel Ribbons
- Strategic Planning and Execution
- Loan Management Tracking
- Order Management Apps

# Faster Implementation

- Through our Domain Expertise and Technical Experience.
- Through our development Processes, Quality Control and First Time Right approach.
- Through our overall project execution approach and delivery mechanism.

### Value Addition

- Our proactive approach towards problem possibilities ensure the smooth running of applications.
- Our suggestive approach enables our partner's to become aware of the possibilities and enhance their product/services effectively.

# Ready Template

• Our framework in excel with ready input mapping and output mapping enable us to tweak as per the requirement for faster usage.

# Ready Framework

• Our ready framework lead to configure the changes as per the requirement for faster development.

# Ready Dashboard

• We have the ready query parameters that are evolved over a period, showcasing the key performance indicators for review and know how.

# Ready Reports

• The variety of reports as per the output mappings enables us to create the reports faster.



# **Development & Integration - Challenges & Impacts**

Challenges for Implementation Team	
Lack of Domain Knowledge	Lack of source systems knowledge
Inadequate mapping of input and outputs	Lack of data sources know how
Inadequate File Specifications & Inadequate validations	Improper Data specifications & Inadequate validations
Lack of test cases and expected inputs/outputs	Prolonged Implementation timeline

Impact on End Users	
Prolonged Implementation timeline	Staggered Users Acceptance Testing
Inadequate Reports / Output	Slower decision making
Delay in information leading High Risk	Loss in Business

Our understanding towards challenges and solution approach enables successful & faster overall execution.





- Competitive Analysis is that part of Banking Tool which helps bankers perform competitive with analysis customizable peer groups. It provide various reports and tools that help know their strengths/ them vis-à-vis opportunities the set competitors.
- Bankers can use it to streamline their peer analysis and gain competitive insights that can be incorporated into planning process.
- It also helps the banks to get the insights needed to improve performance and satisfy examiner requirements for peer comparisons.

# **Challenges / Business Problem**

Build product with features like:

- Competitive Analysis of a Bank and its peers based on key financial ratios.
- Point and click to select competitor banks or build your own customizable peer groups.
- Key performance metrics for all banks in the country at fingertips.
- Pinpoint Best-in-Class performance comparing bank and top competitors.
- Growth analysis over a range of time periods.
- State ranking reports for ROE, ROA, Efficiency Ratio, NIM, and other key measures that gives the standing of a bank in its own state.
- Drag-and-drop custom report packets for Board, Regulators, and Executive Team.
- Merger Analysis to help make best decisions for the bank's future. Merge a bank with any other bank in the country, test out opportunities and see how the combined organization stacks up against competition.

# Overview

### **Client & Users**

Region : USA Industry : Banking

### **Project Overview**

- Schedule: 2-4 weeks Sprint iterative method
- Team Size : 7

# **Technology**

- MS Visual Studio 2013, 2005
- MS SQL Server 2005
- .NET Framework 4.5, 2.0
- ABC PDF .NET
- Chart Director
- Crystal Report
- MS FxCop
- MS Access
- MS Excel
- MS Word
- MS Project



# Case Study – Forecasting Analysis & Reporting

# **Solution Overview**

- Forecasting module is that part of Banking Tool that uses call report data, built-in modeling features, and forecasted rate information, automatically creates a 3-year projection for any bank.
- It gives instant access to a 3-year forecast and automatic quarterly updates along continuous rolling view of performance trends.
- It also gives various reports and tools that help them know the strengths and opportunities and set and plan goals.

# **Challenges / Business Problem**

Build product with features like:

- A 3-year financial projection with automatic quarterly updates.
- Access to an executive-level forecast to work from, giving bankers time to focus on analyzing and fine-tuning their plan rather than building it.
- Streamlined editing features for varying time periods to easily alter forecast as conditions change and Instantly see the impact on bottomline as you evaluate alternative 'what-if?' tactics.
- Save as many scenarios as you like, graphically see how they compare, then determine your best course of action. Record assumptions and action plans for quick future reference.
- Risk Analysis reports for liquidity, contingency funding, future capital adequacy and ALLL needs under stressed conditions.
- Flexible Reporting Options- Drop down menus offer views of alternative time periods, custom report packages in PDF and excel, 20 qtr historical and 12 quarter forecast data.

# Overview

### **Client & Users**

Region : USA Industry : Banking

# **Project Overview**

- Schedule : 2-4 weeks Sprint iterative method
- Team Size : 7

# **Technology**

- MS Visual Studio 2013
- MS SQL Server 2015
- NET Framework 4.5, 2.0
- ABC PDF .NET
- Chart Director
- Crystal Report
- MS FxCop
- MS Access
- MS Excel
- MS Word
- MS Project





- Risk Analysis is that part of Banking Tool which gives a complete Interest Rate Risk profile of any bank.
- Narrative summaries and visuals make it easy to confidently communicate a bank's risk position.
- Bankers can cut through complexity, save time, and get the information needed for Board, ALCO and examiners.

# **Challenges / Business Problem**

Build product with features like:

- Ability to do interest rate risk analysis and submit a risk report to the examiners of the bank.
- Completely customizable assumptions to fine tune bank's data.
- Current cash flow, maturity and re-pricing information in Gap Report.
- Simulation of the new interest margin under varying interest rate conditions.
- Incorporate the most modern techniques to evaluate the resilience of the bank's structure, and report its Economic Value of Equity (EVE) risk estimate in clear, transparent terms.
- Back checking to validate the results of the Rate Shock method.
- Performance Forecast to provide a more meaningful report of the potential changes to the bottom line, four quarters from the current quarter.

# Overview

### **Client & Users**

Region : USA

Industry : BankingTotal Users : 800+

### **Project Overview**

Schedule: 2-4 weeks Sprint – iterative method

Team Size : 7

# **Technology**

- MS Visual Studio 2013
- MS SQL Server 2015
- .NET Framework 4.5, 2.0
- ABC PDF .NET
- Chart Director
- Crystal Report
- MS FxCop
- MS Access
- MS Excel
- MS Word
- MS Project



- Executive Dashboard is a web based reporting interface for a desktop based application.
- The data in the Dashboard is imported from database of desktop application in a real time basis and instantly present the data into meaningful information for to the board.
- The Reports on the Web are available on Desktops, Laptops, Tablets, and exportable to Excel and PDF.

# **Challenges / Business Problem**

Build product with features like:

- Ability to import data from client-server desktop applications to Web Interface Dashboard.
- Instant availability of various reports for analysis.
- All the reports are made exportable to Excel and PDF.
- The reports consist of meaningful ratios and financial statements of various time periods.
- The reports are generated at branch level and also at holding company level.

# Overview

### **Client & Users**

Region : USA

Industry : BankingTotal Users : 150+

# **Project Overview**

Schedule: 2-4 weeks Sprint – iterative method

Team Size : 4

# **Technology**

- MS Visual Studio 2013
- MS SQL Server 2015
- .NET Framework 4.5, 2.0
- ABC PDF .NET
- Chart Director
- Crystal Report
- MS FxCop
- MS Access
- MS Excel
- MS Word
- MS Project



# Case Study – Customized Excel Ribbon

# **Solution Overview**

- Excel Ribbon is an add-in especially developed for analysis of bank data, it enables users to extract various reports into multiple sheets of a single workbook.
- The customized query pads allow users to pull data in a variety of formats.
- It allow users to create custom ratios and extract the data as per the user defined ratios in a desired format.
- Ability to upgrade to a newer version automatically whenever a newer version is available.

# **Challenges / Business Problem**

Build product with features like:

- Ability to sign in as a valid user and access banks data.
- Import data from a cloud server into various sheets of a single workbook.
- Generate performance ratios, Balance Sheet and Income Statement for Quarterly, Year-to-Date (YTD) and Annual periods.
- Ability to select 100+ ratios and 100+ line items of data for Yearly, Quarterly and YTD periods of last 15 years data and print it on the sheet.
- Extract data for one or more banks for a single or multiple periods.
- Ability to extract data and report from the list of predefined ratios and a facility to create user defined ratios for various analysis.
- Ability to refresh the data in one or all the sheets as per the criteria.

# Overview

### **Client & Users**

Region : USA

Industry : Banking

### **Project Overview**

Schedule: 2-4 weeks Sprint – iterative method

Team Size : 7

# **Technology**

- MS Visual Studio 2013
- MS SQL Server 2015
- .NET Framework 4.5, 2.0
- ABC PDF .NET
- Chart Director
- Crystal Report
- MS FxCop
- MS Access
- MS Excel
- MS Word
- MS Project



# Data Download, Analysis, Validation & Migration & Reporting

# **Solution Overview**

- 6500+ Bankers Data is required to be updated for 500+ line items at a frequency of Quarterly, Daily, On Demand basis
- The application is required to re-update the data that is updated at the source on a daily basis.
- Methodology
  - Download the Data
  - Validate the Files
  - Read the Raw Data
  - Convert the data from Year-to-Date (YTD) format to Quarterly
  - Migrate the data to main database.
  - Generate post data migration operations
  - Validate the overall data

# **Challenges / Business Problem**

Build product with features like:

- Ability to download the data at a frequency of daily, quarterly, ad-hoc & manually.
- Import 6500+ data file.
- Validate the file & generate a log.
- Extract 500+ line items from the raw data.
- Convert the data from YTD to Quarterly.
- Migrate the data.
- Validate the overall data and generate a status report.
- Perform post update operations.

### Overview

### **Client & Users**

- Region : USA
- Industry : Banking

### **Project Overview**

- Schedule: 2-4 weeks Sprint iterative method
- Team Size : 3

# **Technology**

- MS Visual Studio 2013
- MS SQL Server 2015
- .NET Framework 4.5
- LINQ
- WCF Windows Communication Foundation
- MS FxCop
- MS Excel
- MS Word
- MS Project



# Case Study – Online Will Generation and Management

# **Solution Overview**

- The solution is SAAS (Solution as a service) based.
- It enable users to manage personal details, family details, assets, liabilities, discharge of the loans and bequeath of the assets and will generation in a desired format/templates.
- It is operated by intermediate users as financial planner/advisors with additional access of ability to view/edit the will of their clients as per the permission granted by their client.
- An admin user with central control can manage content of the will, intermediate users/agents, pricing of intermediate agents with a facility to manage / grant token to the intermediate financial planners.
- Multiple reports in admin panel as well as on going reports are emailed to the support team to keep them updated with the all the happenings in the application.

# **Challenges / Business Problem**

Build product with features like:

- Enables a user to subscribe a service of will generation.
- Facility to note personal details, family details, assets, liabilities, discharge of the loans and bequeath of the assets.
- Generate a will draft & final will.
- Mange exceptions in case of validation and authentication issue.
- Facility of role based login for admin user, intermediate user with/out edit right and user as will owner.
- Ability to create an intermediate user as financial planner with additional rights of ability to view/edit the will of their clients.
- Ability to manage / grant token to the intermediate financial planners.
- Trace and raise alerts / exceptions based on the information added by the user.

# Overview

### **Client & Users**

Region : India
Industry : Banking

# **Project Overview**

- Schedule: 2-4 weeks Sprint iterative method
- Team Size : 5

# **Technology**

- MS Visual Studio 2013
- MS SQL Server 2012
- .NET Framework 4.5
- MS FxCop
- MS Excel
- MS Word
- MS Project
- PDF Tool



- A desktop based application.
- Enable users to select a video traffic video, perform analysis and reports about the vehicles in the video.
- A facility to manually count a vehicle by pressing pre-defined keys.
- Generate reports with a count of vehicles, identified and unidentified vehicles, total vehicles, frame-wise count, average vehicles of various types in a defined time frame, and exceptions report etc.

# **Challenges / Business Problem**

Build product with features like:

- Analyze a video of any format.
- Ability to configure vehicles types for which the analysis should be performed.
- Provide a count of vehicles of every vehicle type configured in the system.
- Provide the overall total count, most frequent vehicles, least frequent vehicles.
- Maintain a log and generate a log a detailed log of every analysis performed.
- Ability to pause/play/rewind/forward a video.
- Ability to configure keys for each vehicle types for manual counting.
- Ability to select a video of various formats like .avi, .mts, .mpg and mp4.

# Traffic Analysis System

# Overview

### **Client & Users**

- Region : India
- Industry : Construction

# **Project Overview**

- Schedule: 3-4 weeks Sprint iterative method
- Team Size : 3

# **Technology**

- MS Visual Studio 2013
- MS SQL Server 2012
- .NET Framework 4.5
- MS FxCop
- MS Excel
- MS Word



# Online Tax Filing System

# **Solution Overview**

- The solution is SAAS (Solution as a service) based.
- It enable users to manage personal details, Income details, Investment details.
- It enables users to process online tax filing request.
- An admin user with central control can manage content of the will, intermediate users/financial advisor.
- Multiple reports in admin panel as well as on going reports are emailed to the support team to keep them updated with the all the happenings in the application.

# **Challenges / Business Problem**

Build product with features like:

- Enables a user to subscribe a service of Tax Filing.
- Facility to add personal details, income details and Investment details.
- Request for tax filing and view the tax filing status
- Get the advise from the financial advisor.
- Facility of role based login for admin user, Financial advisor user with/out edit right and user as individual.
- Generate various reports with a facility to export to Excel / PDF.

# Overview

### **Client & Users**

Region : India

# **Project Overview**

- Schedule: 8-10 weeks Sprint
  - iterative method
- Team Size: 3

# **Technology**

- MS Visual Studio 2013
- MS SQL Server 2012
- .NET Framework 4.5
- MS FxCop
- MS Excel
- MS Word
- MS Project
- PDF Tool
- Payment Gateway





- A native mobile app to enable users to register as a realty broker.
- It enables an admin user to create and maintain property details.
- It enables an admin to notify brokers about the new/change in the property.
- An admin user will main the users and its data.
- A facility in an app to view the notifications from the admin.
- A facility in an app to search properties and share with leads
- A facility in an app to manage leads
- A facility in an app to enter the entire profile consisting of 65+ fields.

# **Challenges / Business Problem**

- Build product with features like:
- Enable a broker to register as broker.
- Enable broker to complete profile and remind to complete the profile.
- Admin should be able to notify whenever there is any change in the property details.
- An app should be developed for for iOS and Android
- Data Migration of the existing brokers.
- Generate various reports with a facility to export to Excel / PDF.

# **Overview**

### **Client & Users**

Region : India Industry : Realty

# **Project Overview**

- Schedule: 8-12 weeks Sprint iterative method
- Team Size : 5

### **Solution Include**

### **Six Projects**

- iOS app for Brokers
- Android app for Brokers
- Web Admin area for Brokers
- iOS app for employees
- Android app for employees
- Web Admin area for employees



# Strategy – Planning, Execution & Monitoring

# **Solution Overview**

- The solution is SAAS (Solution as a service) based.
- It enable users to manage Vision, Mission, Core Values.
- It enables users to perform and note SWOT analysis.
- It enables users to determine Objective, its measures and initiatives with a defined start and end dates
- It enables users to create/add/maintain users and assign the objectives and initiatives.
- It enables app to remind / email users for their upcoming objectives and initiatives
- It enables users to benchmark, monitor and track results

# **Challenges / Business Problem**

Build product with features like:

- Determine the strategic direction and strategic focus of a company.
- Determine SWOT
- Create and maintain objective in relation to SWOT
- Ability to Perform Market Analytics.
- Gather, Download and Analyze the State / County / Zip Code and Census Tract level Demographic data like Income, Age, Household etc
- Plot various demographic data on the map for various visualization and analysis purpose.
- Generate various reports with a facility to export to Excel / PDF.

# Overview

### **Client & Users**

Region : USA

Industry : Banking

# **Project Overview**

Schedule: 2-4 weeks Sprint – iterative method

Team Size : 3

# **Technology**

- MS Visual Studio 2013
- MS SQL Server 2014
- .NET Framework 2.0 & 4.5
- MS FxCop
- MS Excel
- MS Word
- MS Project
- PDF Tool
- Google Maps





- The solution is SAAS (Solution as a service) based.
- It enable users to manage Loan Applications.
- It enables users to assign a loan application and its stages to multiple team members.
- It enables users to monitor a loan application and its progress at each stage.
- It enables users to create/add/maintain users and assign location application across various branches.
- It enables the executive to enter and track an application stage on a daily basis.
- The dashboard gives a quick snapshot of the how many applications are at which stage across the branches.

# **Challenges / Business Problem**

# Build project with features like:

- Add a lead and assign an entire workflow of the loan application process.
- Ability to view a dashboard with vital information like #Loan Applications in Process, #Loan application at various stages, #Employee-wise Stage-wise Loan application count
- Generate an MCLR mismatch report.
- Send auto emails to applicants at various stages of the loan processing, and reminders on the EMI dates etc
- Generate various MIS reports to determine the bottle necks in the loan processing.
- Monitor a TAT of an application executivewise stage-wise
- Generate various reports with a facility to export to Excel / PDF.

# Overview

### **Client & Users**

- Region : India
- Industry : Financial Services

# **Project Overview**

- Schedule: 2-4 weeks Sprint iterative method
- Duration: 3 months
- Team Size : 5

# **Technology**

- MS Visual Studio 2015
- MS SQL Server 2014
- .NET Framework 4.5
- MS FxCop
- MS Excel
- MS Word
- MS Project
- PDF Tool
- MVC
- Bootstrap





- The solution is SAAS (Solution as a service) based.
- It enable to create users to manage Franchise, view orders, and overall data management.
- It enables franchises to generate orders to the manufacturing unit. View / Edit / Track the status of the orders. Enter sales and set re-order level and execute automatic purchase order.
- It enables manufacturing units to view the orders received from the franchises and execute orders.
- It enables admin users to maintain the overall data and generate the various reports.
- The dashboard gives a quick snapshot of the how many orders are at which stage from all the franchises as well as gives the sales numbers.

# **Challenges / Business Problem**

Build project with features like:

- Ability to manage franchise.
- Order Management Capabilities and Order Execution and Tracking Capabilities.
- Track the sales of each and every franchise.
- Set re-order level and auto-ordering facility.
- Generate various MIS reports to determine the bottle necks in the loan processing.
- Generate various reports with a facility to export to Excel / PDF.

# **Overview**

### **Client & Users**

- Region : India
- Industry : Food and Hospitality

# **Project Overview**

- Schedule: 2-4 weeks Sprint iterative method
- Duration: 3 months
- Team Size : 5

# **Technology**

- MS Visual Studio 2015
- MS SQL Server 2014
- .NET Framework 4.5
- MS FxCop
- MS Excel
- MS Word
- MS Project
- PDF Tool
- MVC
- Bootstrap



# **PROJECTS**



- Competitive Analysis
- Forecasting
- Interest Rate Risk Management
- Executive Dashboard
- Data Analytics & Visualizations Dashboards
- Custom Excel Ribbons
- Strategy Planning, Execution & Monitoring
- Project Monitoring and Tracking System



- Kotak Mahindra Bank Will Management & Integration
- HDFC Mobile App & Back office App
- Traffic Video Analytics
- Loan Management System
- Meals Order Management System
- Franchise Management System



# Manual Functional Testing

Test Cases Creation and Execution

Automated Data Testing - Using SQL Scripts

**Black Box Testing** 

White Box Testing

User Interface & Usability Testing



# **Key Roles**

# Service & Expertise

**Business Analysts Functional Experts** Designers & UI/UX Experts Architects & Developers QC/QA and Testers **Project Managers** Scrum Masters

Financed Based Custom Application Development

Data Analytics, Mining, Validation & Migration

**Data Visualization & Reporting** 

Web/Desktop - Custom Business Application Development

Application Manual Testing Services and Automated Data Testing

Office Automation (Excel integration with Cloud/Services/Servers)

Video Analytics – Object finding, counting, filtering, traffic analysis

E-Commerce Solutions, Facebook Apps

Mobile Applications (Native, Hybrid & Cross Platform)



# Thank You

# Contact us

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