



ARION ERP CASE STUDY FINTECH INDUSTRY



Client Overview

The client is a leading financial asset management company providing various services like wealth management, investment management, and financial planning to help people accomplish their financial objectives for the future. Client offers their services to individuals as well as large corporate organizations. Client is dedicated to safeguarding the interests of the investors by providing smart management of investors' funds.

Arionerp is dedicated to providing the best industry specific ERP solution for your business with great functionalities. We provide great customer satisfaction by continuous growth and innovation.



What Issues Did Client Face?

Client required a system to easily handle the processes related to assets management for their customer base that includes individuals and corporate organizations. The application was required to provision facilities like financial assets reporting, management of financial accounts of all customers, and automatic update of market value and book value of assets according to the latest currency exchange rate.

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How Did We Resolve These Issues?

We did customization in ArionERP financial management module to meet the diverse requirements of the client. The resulting, customized ArionERP solution handles various complex operations. The system can be used to regularly manage the financial asset statements, and the transactions related to buying and selling of assets. The latest currency exchange rates are applied automatically. The market values of the assets are automatically updated. The market values are then analyzed against the book values of the assets, and analysis reports are generated.



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Key Points Of Our Solution

We collaborated closely with our client to develop a detailed understanding of the functional and technical requirements of the system required by client. During the development work, we made sure to incorporate any suggestions or feedback provided by client, so that the end-result was exactly as client anticipated. The developed financial management module handles all accounting related operations related to assets transactions, including tracking of profit and loss.

How Did The Solution Benefit Client?

The ArionERP solution has provided a simpler and easier way for client to carry out their operations and provide superior quality of service to their customers. The solution has enabled the client to expand their business operations, manage their customers more efficiently and build lasting customer relationships.

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