

SaaS based Financial Dashboard Application

Client is a Europe based leading Chartered Accountant Firm.

Vision

Develop **SaaS Based Financial Dashboard Product** that can help individual and Chartered Accountants (CA) to analyze financial portfolio for accounting software's **Idylis** and **Sage**. The product should provide interactive dashboard with collaboration capability. The product is targeted for iPad users.

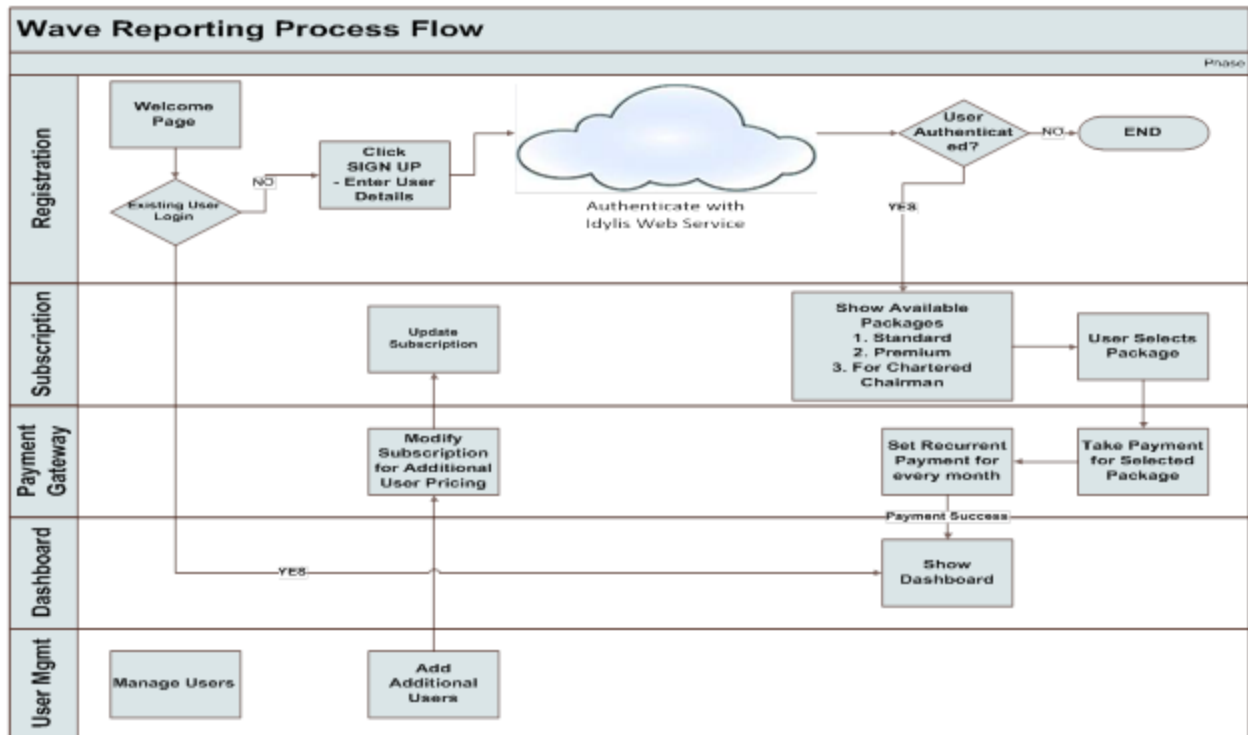
End User

The end users of the application are CA's and individuals who can analyze their financial portfolio

Project Overview

- Application has following features:
 - Interactive Dashboard with multi-company filter integration
 - Timeline Integration
 - Feedback module Integration
 - Open-source ticketing integration
- SaaS platform features are as follows:
 - User Management
 - Role based access control
 - Subscription Management
 - Payment Gateway Integration

Application process flow is as follows:



Challenges

Due to strict project timelines, it was important to be on schedule and make sure there are no slippages in place

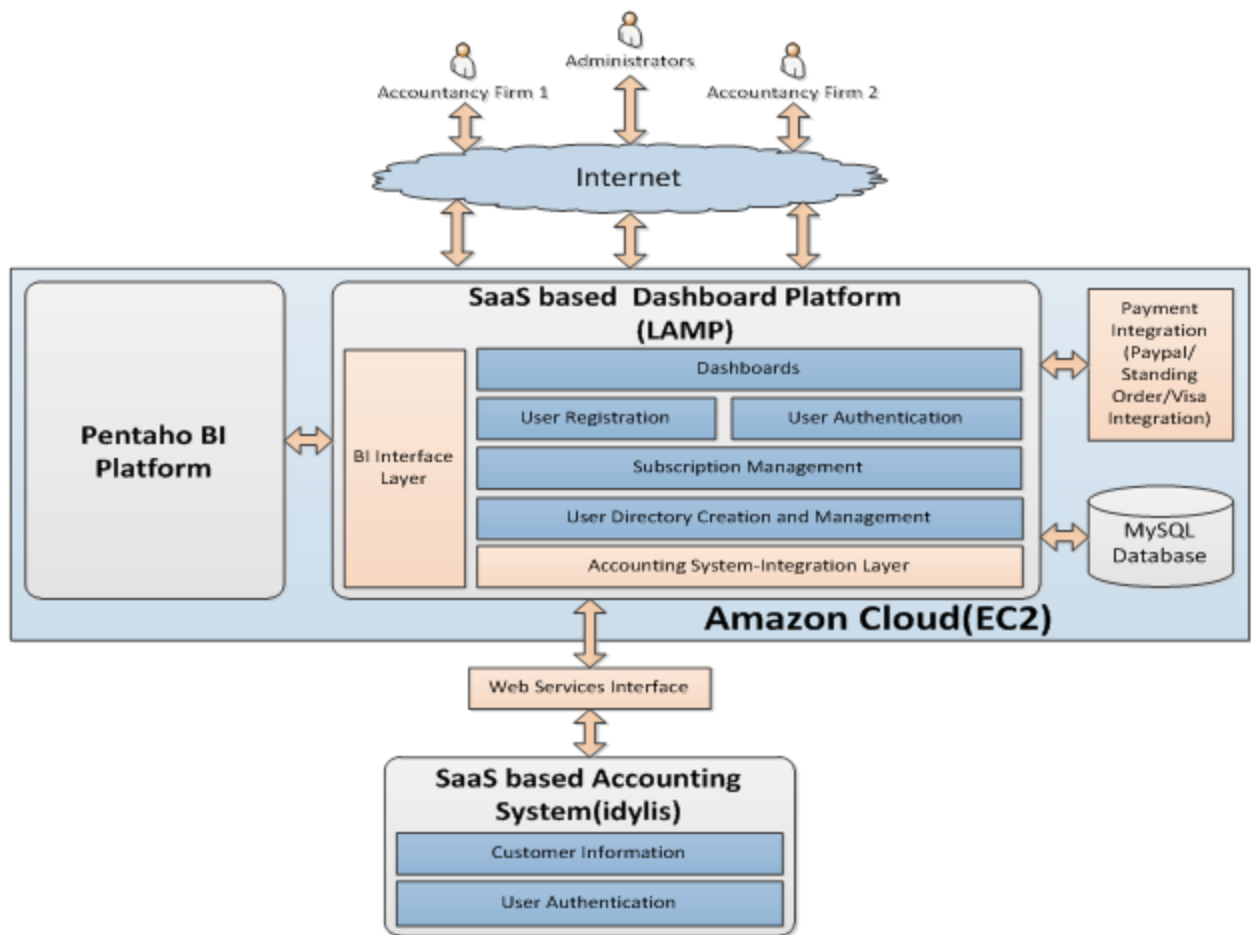
Solution Highlights

Embedding Open Source BI tool Pentaho within application reduces development efforts and offered modular architecture



Solution Architecture

We used our Pentaho and PHP expertise and product engineering and development methodology for SaaS based BI platform. Our product engineering and development methodology spans from conceptualization, architecture, design, development, testing, deployment and enhancements to porting and ongoing support. Below shown is a high level architecture block diagram of the solutions we provided:



Technologies Used

- Pentaho Business Intelligence Platform
- LAMP/WAMP based Application Development
- PHP 5
- MySQL
- Apache
- Windows/Linux
- AJAX
- JavaScript
- Cloud deployment on Amazon Web Services (AWS)

e-Zest Strengths

- High competency in Database Architecture
- High Competency in BI Services
- High competency in using PHP, Cloud
- Disciplined work force with strong team spirit, communication skills and time management

Customer Benefits

- On time Project Delivery
- Performance enhancement of the product
- Standardization of technology architecture
- Well-defined processes and documentations
- Faster time-to-market for product
- Improved efficiency and cost structure while maintaining core skills
- Lower costs without compromising quality