

DIGITAL ENGINEERING: PROVIDED CLOUD-BASED ADMINISTRATION SOFTWARE FOR PRIVATE EQUITY FUNDS FOR CRM DATABASE AND PORTFOLIO MANAGEMENT

CLIENT:

A leading venture capital fund administration firm handling essential details of investor communications.

CHALLENGE:

To create an administration platform that is simple and secure to access critical data and update important information for investors. We should track investment transactions, portfolios, and communications with the latest reporting features.

SOLUTION:

We have built a salesforce-managed package called FundPanel to keep track of investment and integrate using third-party REST APIs. We also provided cloud-based administration software for private equity funds for CRM database and portfolio management.

