



Project : Investment Portfolio and Asset Track

September 06, 2021



AGENDA



- ▶ Project Objective
- ▶ Mockup vs Solution
- ▶ Extras
- ▶ Goals Met
- ▶ Q&A

Project Objective

Problem Statement

The Ksquare group is looking to develop an investment portfolio and asset track application to track personal investments in Salesforce. The solution should provide an easy way for seeing the current portfolio status. Things like the portfolio asset division, the amount invested in the different assets, a list of recent investments and a list of the fixed-rate investments that will end soon are required.

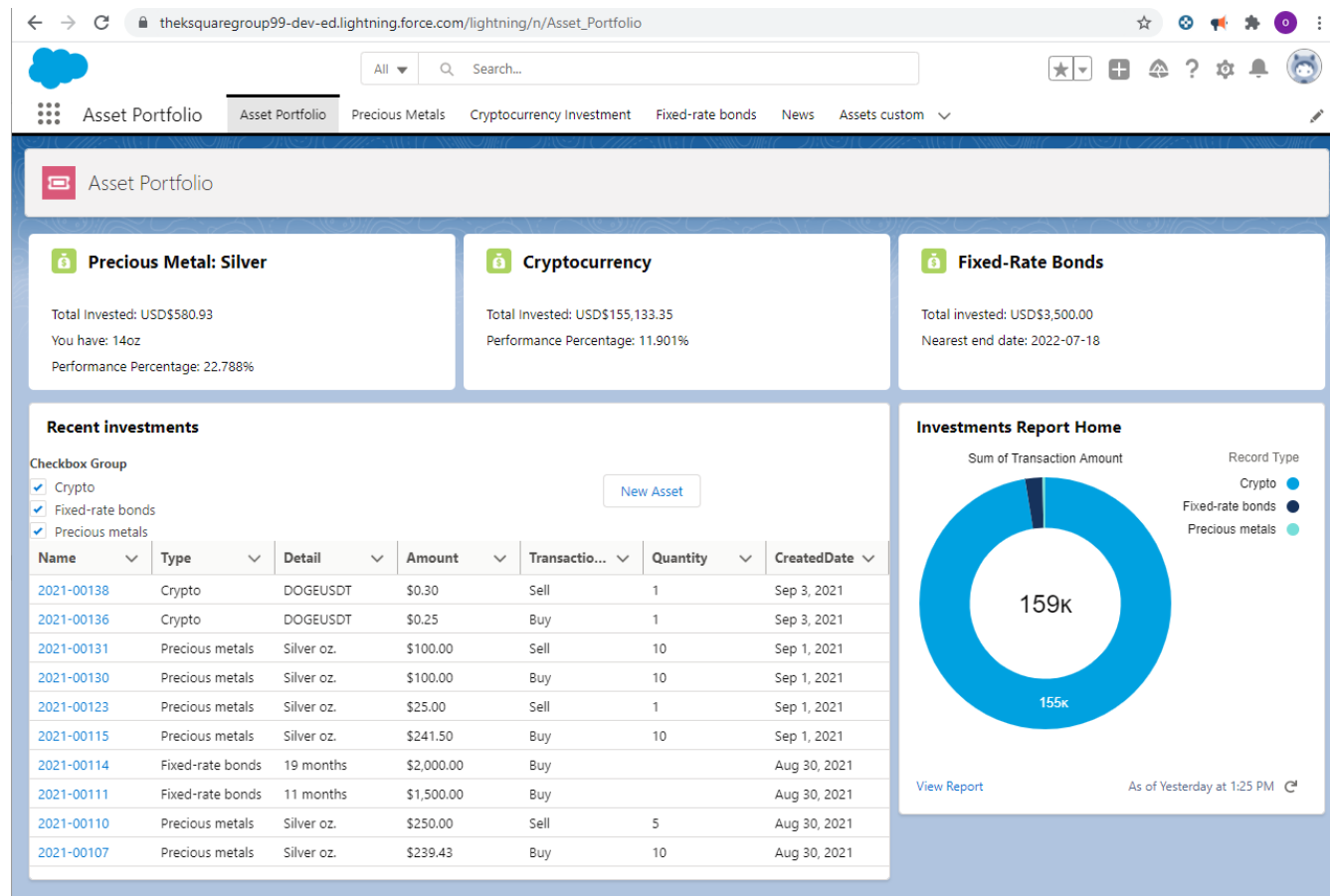
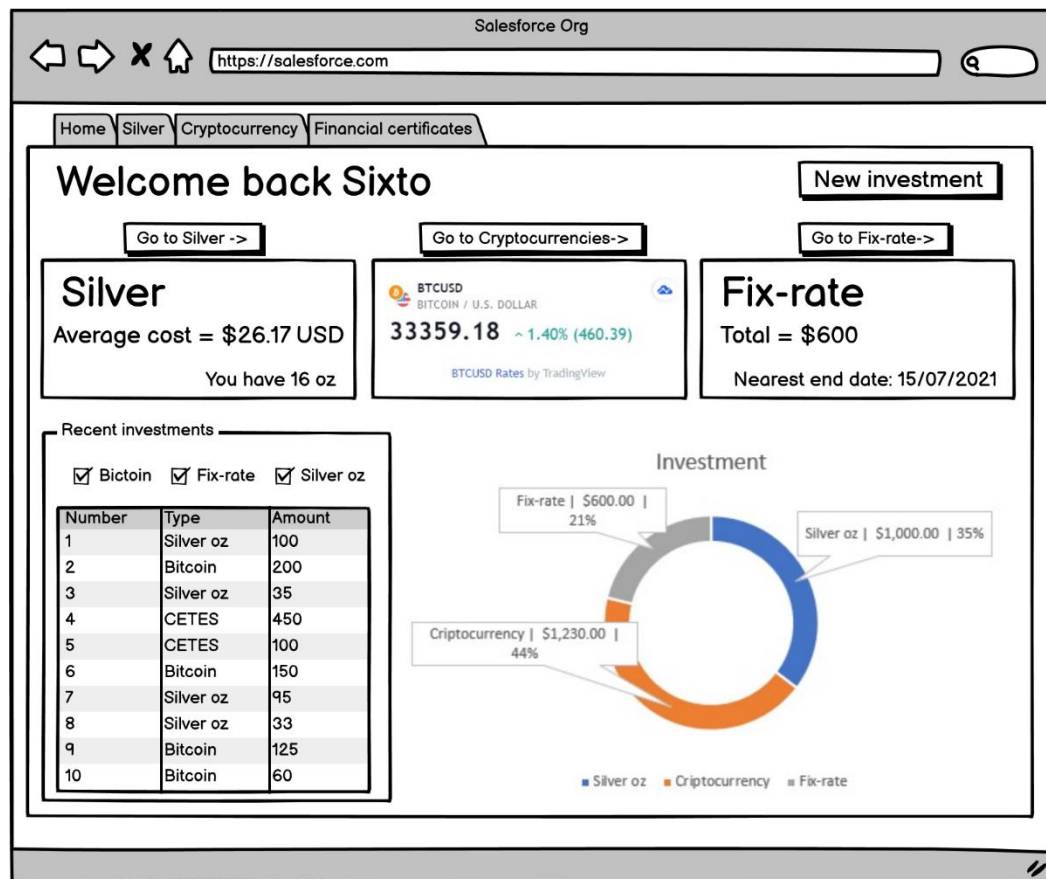
Current pain points

- Lack of overall and dedicated data visibility, no reports or dashboards.
- Repetitive unnecessary processes including data entry and research of updated data.
- Complex manual calculations to get important data.
- Not mobile friendly information.

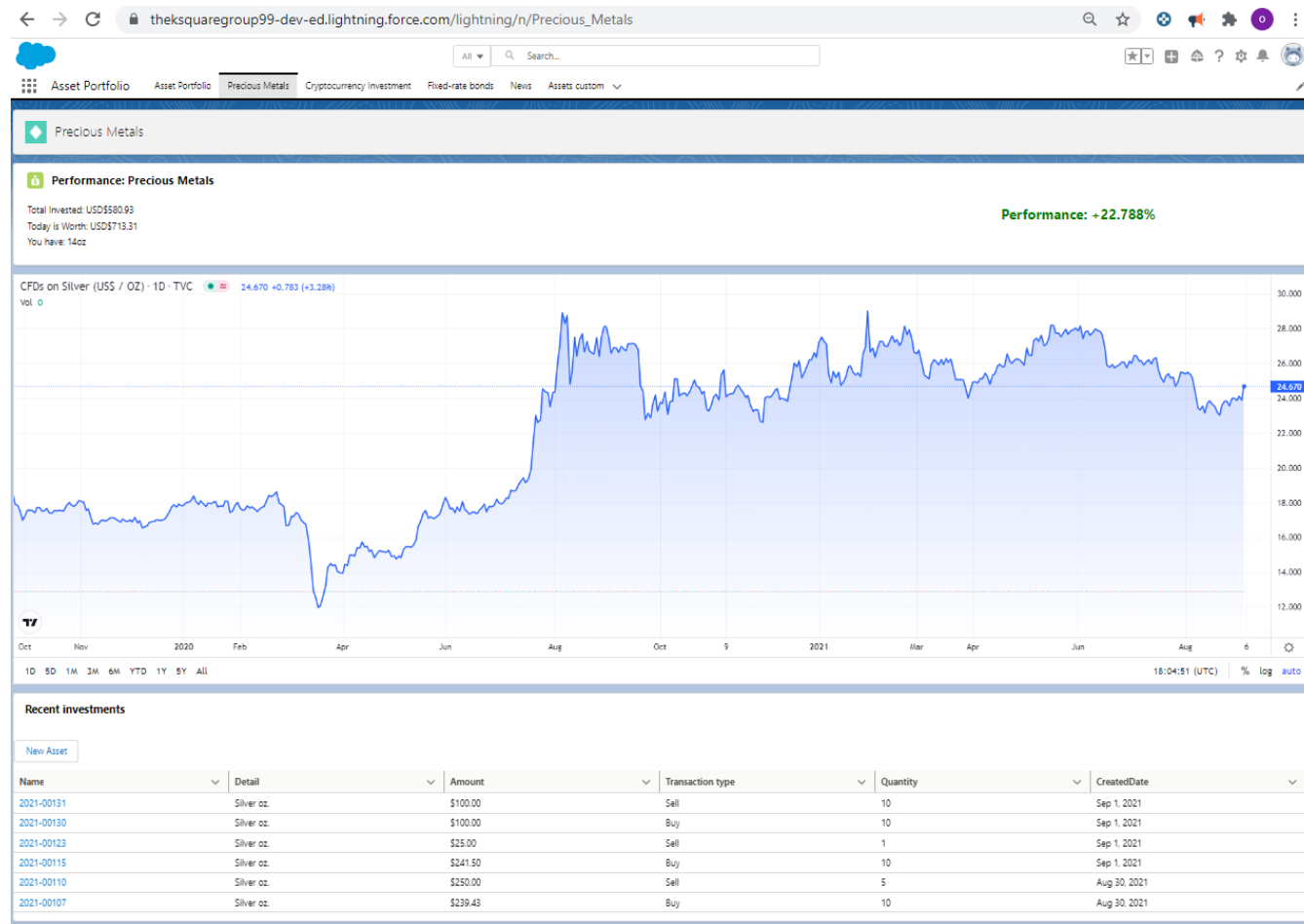
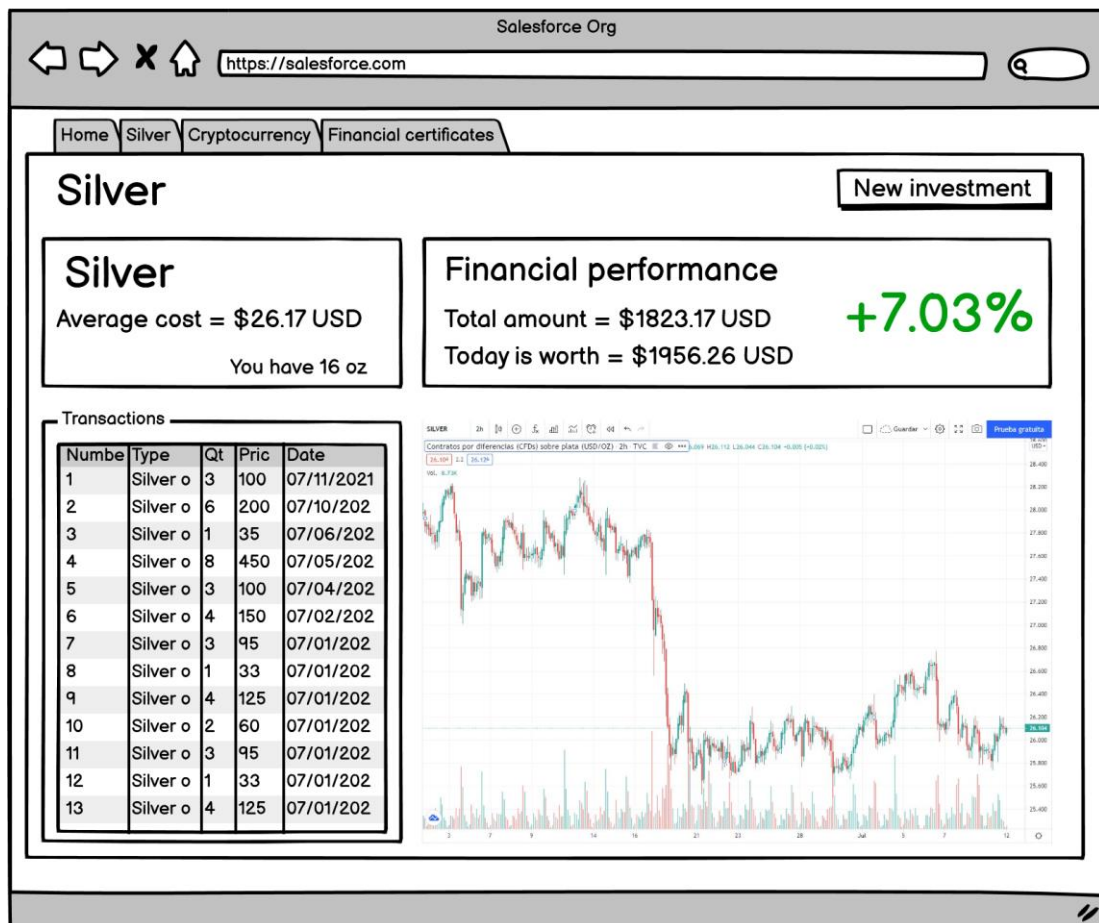
Solution

We will develop a Salesforce mobile and web application to save records of any transaction and compare in real time the performance and profit of your portfolio. The application will have intuitive and easy to use design, including important data indicators, reports and dashboards of all your assets. All calculations will be automated and integrated to Binance and TradingView API to save user's time.

Mockup vs Solution

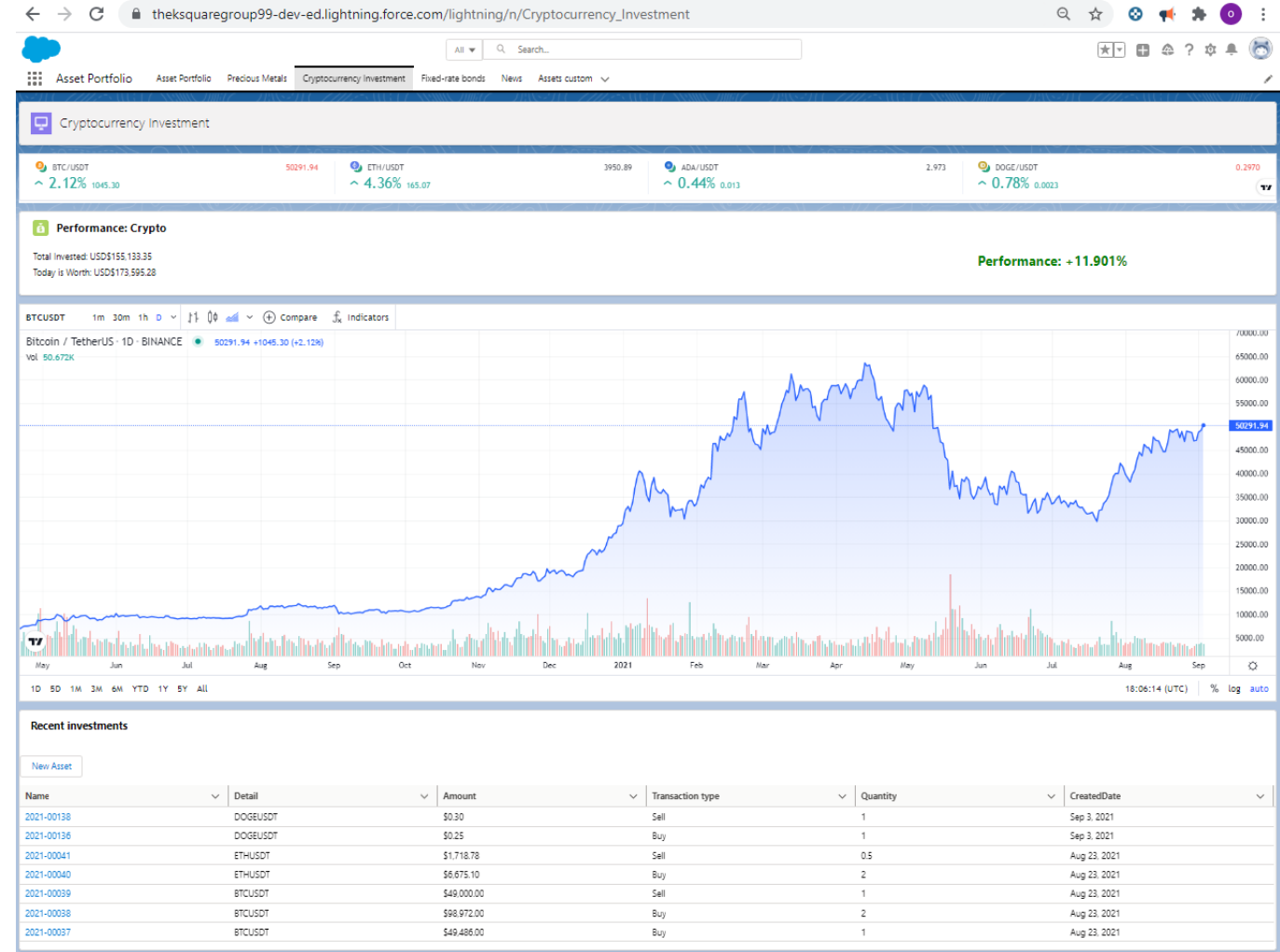
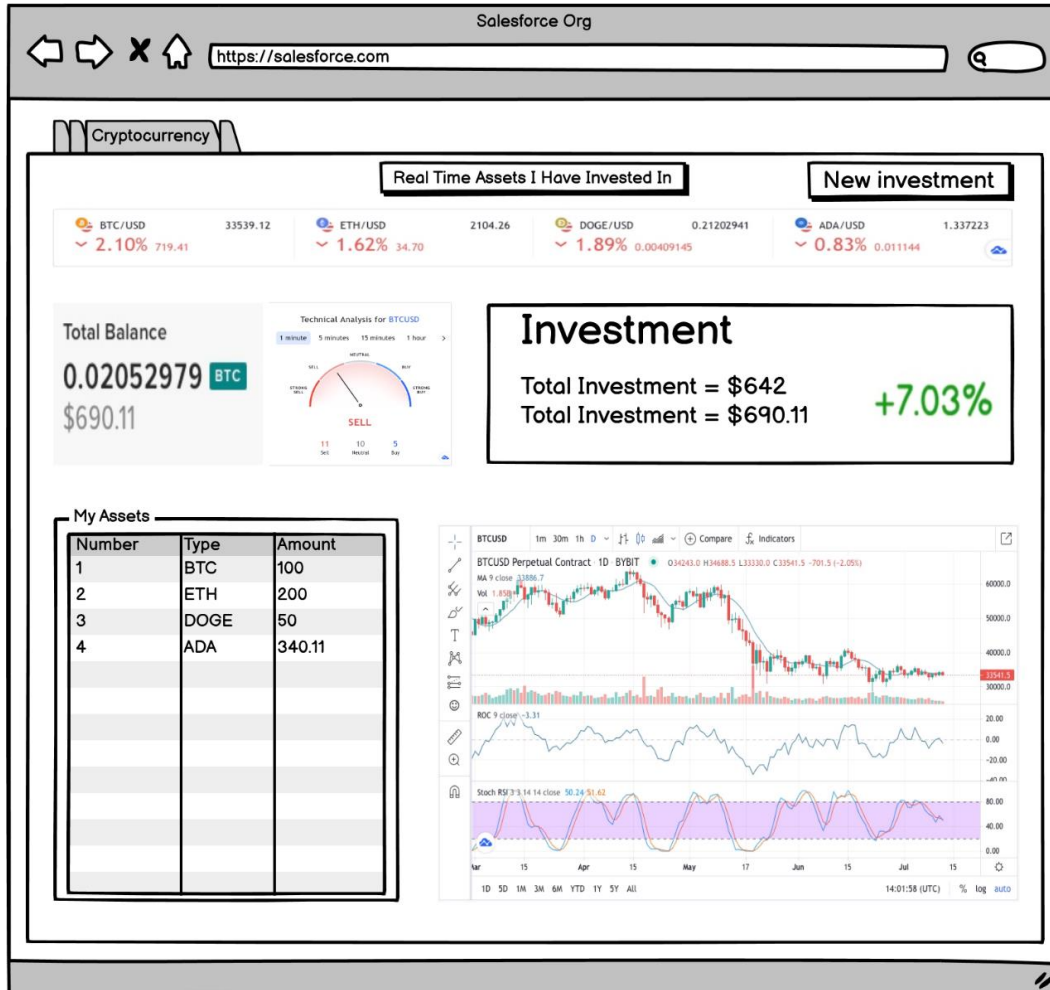


Mockup vs Solution

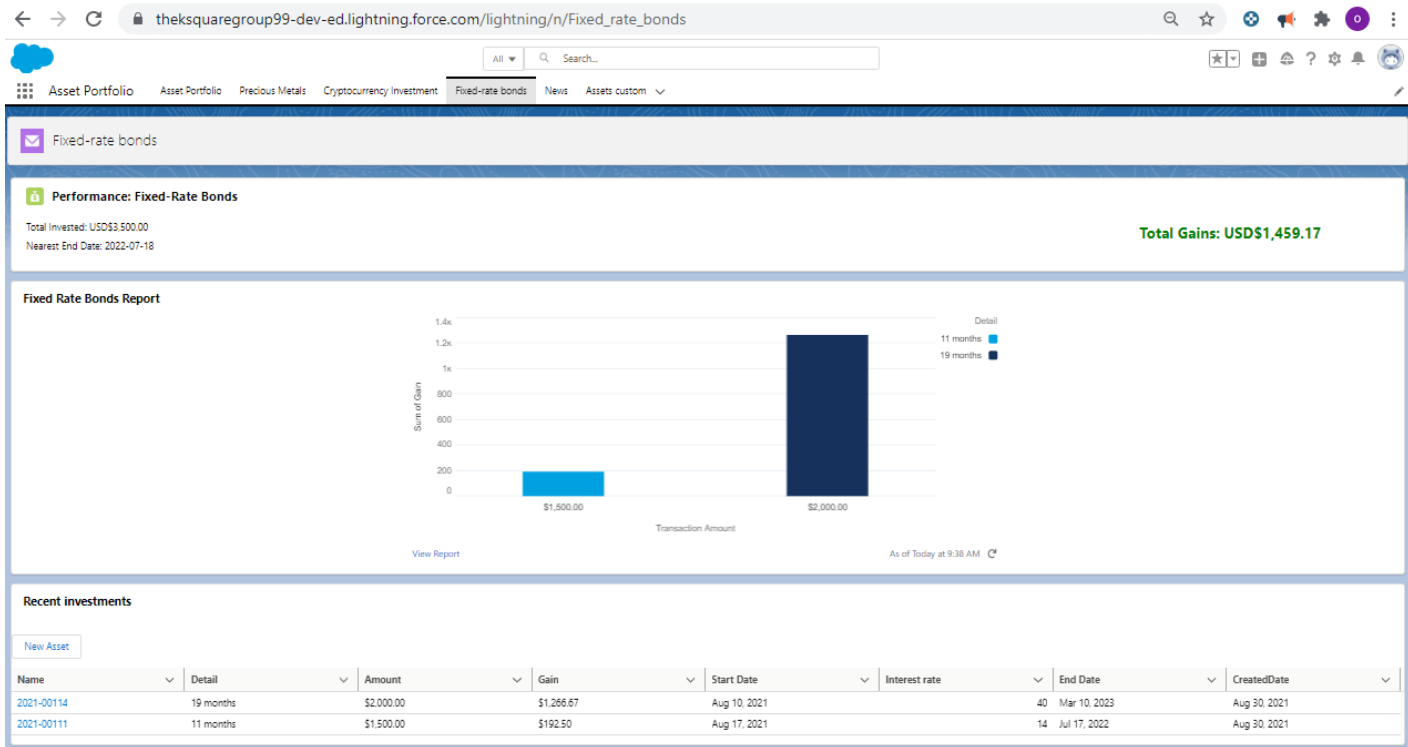




Mockup vs Solution

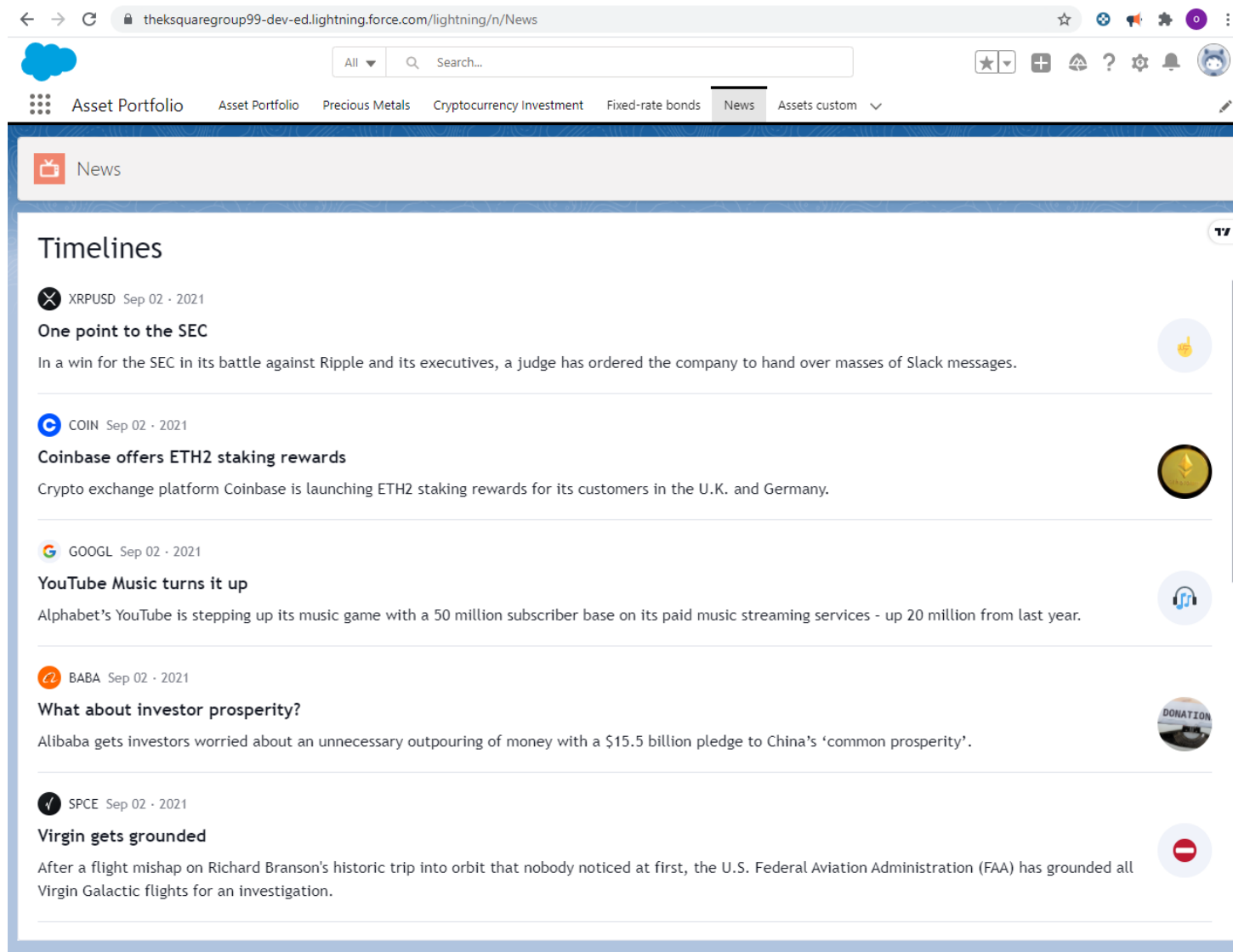


K Mockup vs Solution



News tab added

Added a space to check the global news related to cryptocurrency and precious metals in order to keep our users updated and give them all the tools to take important decisions.





Goals Met

Goal	Achieved / Not Achieved
Data visibility with reports and graphs	Achieved
Real-time performance and profit calculations	Achieved
Intuitive and easy to use design	Achieved
Mobile friendly	Achieved
News tab	Achieved



Any questions please let us know and we will answer you as soon as possible.

<Thank you>

Team:

Solution Architect: Maximo Abreu / Customer Representative: Daniel Pérez

Salesforce Developers:

Kevin Maldonado / Luis Pérez Mendez / Manuel Liriano / Ovidio Giles