



Orchard Wealth Management

<http://www.orchardwealthmanagement.com>

CRM and portfolio management application

Orchard Wealth Management is a leading financial asset management house located on the island of Jersey. Orchard's dedication to customer satisfaction and the growth of their customer's assets has seen the business grow year on year.

In order to meet Orchard's growing customer base it was decided that a custom database would need to be created which would act as both a fully functional CRM and portfolio management utility.

Tenders were invited for the creation of an application which would incorporate the features that Orchard had outlined after reviewing their requirements. Atlas submitted a successful tender and development began.

The application is now complete and Atlas in association with Orchard are jointly promoting the completed system in the form of Atlas Financial – more information on the product can be located on the dedicated site www.atlasfinancial.co.uk.

Project points

- Custom Windows application with powerful reporting capabilities
- Built in Outlook style shared calendars
- Billing functionality allowing the automated generation of customer invoices
- Fully FSA compliant for the management of portfolios and associated risks

Tech specs

- Hosted on our RackSpace servers, with access enabled via a dedicated Windows application
- Microsoft Windows .Net 3.5 VB
- Microsoft SQL Server 2005
- Aspose Words used for letter mail merge functionality

For more information on Atlas's software development services please call **0845 867 2845** or visit the Atlas website at www.atlascs.co.uk

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