WEALTH ENVOY
Enterprise
**Research Services Organized**

Vision

To enable Financial Advisors to communicate wealth related information in an organized way along with the mechanism to Track & Analyze such communications; which will help them in improving quality, reaching to higher number of Subscribers with lesser efforts, increasing revenue and decreasing costs

WealthEnvoy Enterprise Architecture
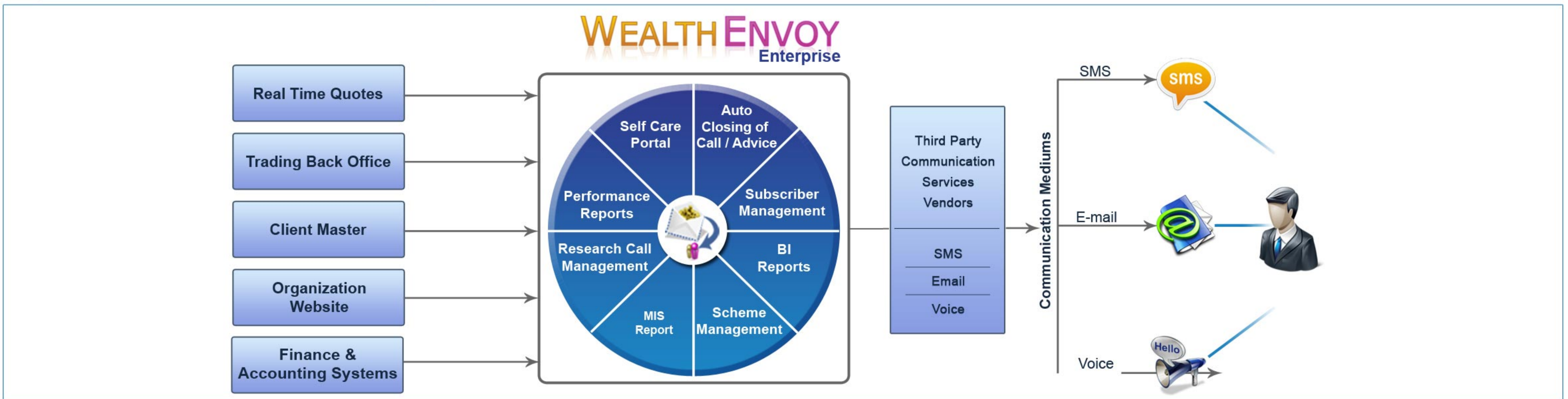
Solution Highlights

Self Care Portal for Subscribers
- A link on your website were customers/prospects can visit
- Subscribe or Unsubscribe for Services
- View Past Performances
- View Past Research Calls sent to them

Subscriber Management
- Subscribe / Unsubscribe Clients
- Manage Client details like Client ID, Name, Mobile No., Email and Some Remarks
- Map Subscriber with his subscribed Scheme
- Manage Client Validity & Renewal (with Auto Reminders via SMS & Email)
- Restrict Clients from receiving Research Calls even after their   Subscription is over
- Subscriber Activation only on Payment Receipt – Auto (Integration with Finance/Accounting System and Client Master)

Research Call Management
- Send standardized calls with call type, buy/sell, scrip, CMP (current market price), S/L, Tgt1, Tgt2, Tgt3
- Send standardized SMS with just a click on the related targets through the same window
  Option to append time in every call
- Call close option with current market price field to record the success ratio
- Set 'Call Close' by Auto Trigerring Closing SMS as the the Scrip reaches the target Price (Integration with Real Time Quote System)

Scheme Management
- Create & Manage Research Call type Schemes By name, price and validity days
- Set single/multiple call type for each Scheme
- Allot different Sender ID for each scheme

Call Type Management
- Define different call types like Intraday, F&O, BTST, STBT, etc. against different Schemes
- Set standardized templates for every call i.e., buy, sell, target hit, stop loss hit and close call

Scrip Management
- Manage scrips by call type
- Auto save facility of scrips as per your identity of the same

Performance Reports
- Publishable reports
  - Scheme wise
  - Profit/Loss wise
  - Scrip wise
  - Date wise
  - Week wise
  - Month wise
  - Call type wise
- Publishable performance Charts and Tabular Reports

Business Intelligence Reports
- Revenue/Brokerage earned against Research Calls (Integration with Back Office & Client Master)
- Advisor/Chartist wise Performance Reports
- Subscriber Renewal Reports

Track & Analyze your Research Performance

Track Revenues generated by Research Calls

Organize your Business Process

Manage Subscribers & their Renewals

Close Trade Calls automatically as the scrip reaches the closing price
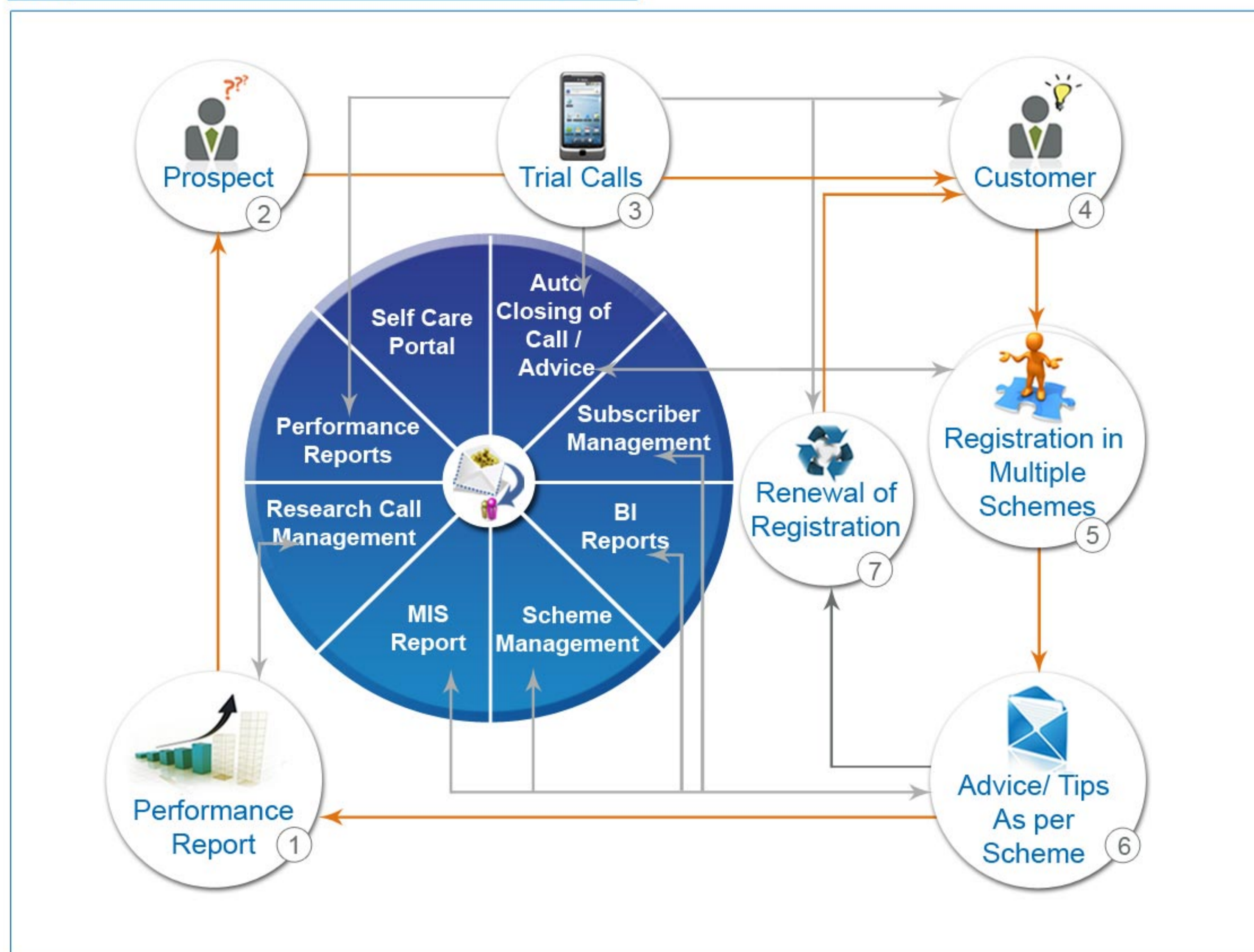
Increase Profit Margins

Users
- Admin
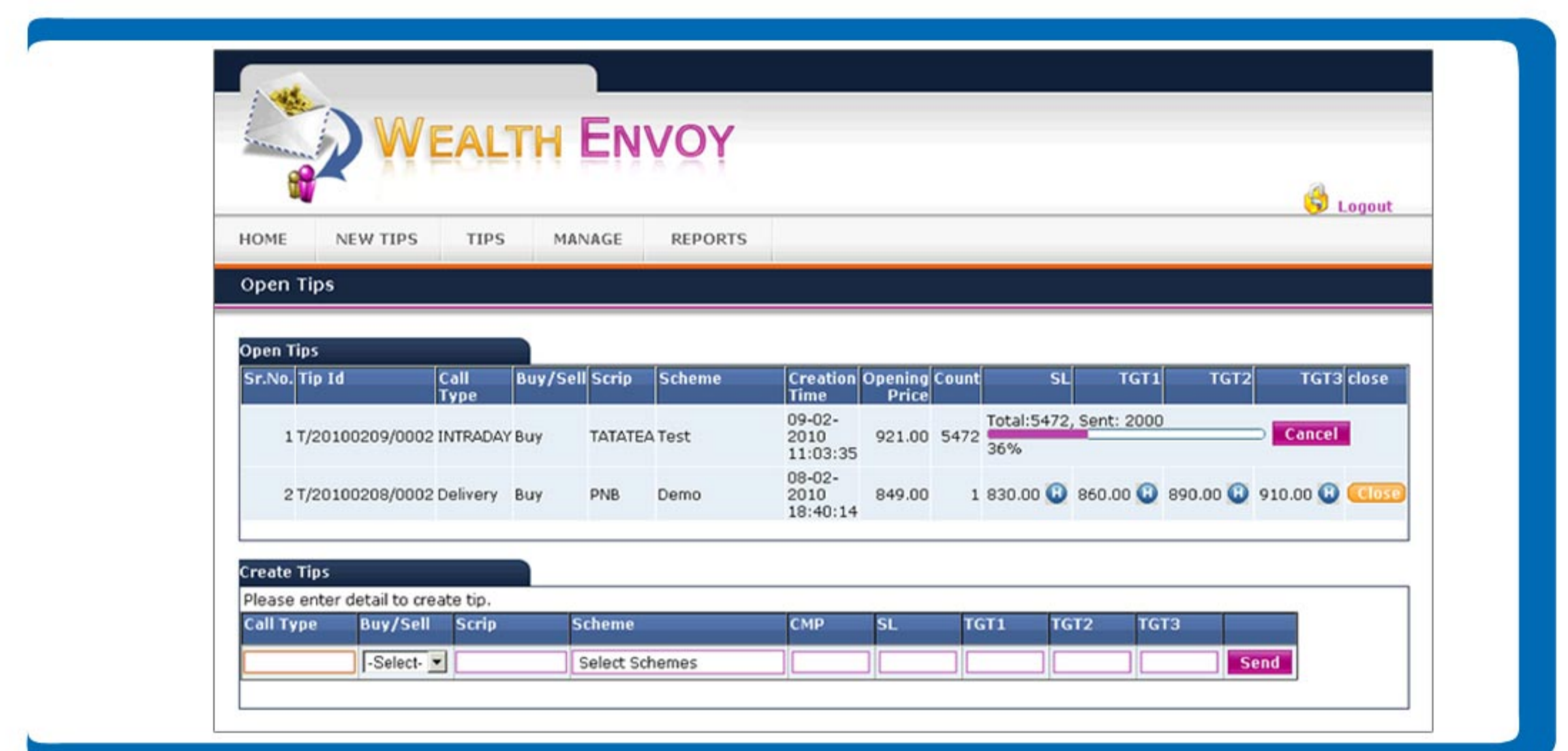- Analysts / Chartists / Advisors
- Sales
- Finance / Accounts

Communication Medium
- SMS
- Email
- Chat *
- Auto Dial *

* Part of Roadmap

Product Brochure

Business Process Flow Diagram

Wealth Envoy in your Business Process

- Subscriber can register online for various schemes through Self Care portal
- Define Free Trial Scheme with validity days to restrict free services
- Define offered schemes, with their validity period.
- Manage customers according to their selected schemes.
- Renew customer services
- Allot different Sender IDs for different schemes.
- Define standard SMS templates for each call type like Intraday, Delivery, F&O, BTST, Buy Above, Sell Below, etc.
- Use standard format to send calls like call type - Buy/Sell - Scrip - Scheme - CMP – SLTGT1-TGT2 - TGT3
- Define standard SMS templates for SL, TGT1, TGT2, TGT3 and Close Tip, so that they can be sent in minimum time.
- Manage scrips with your defined codes with auto save facility of scrips
- Append time with each call
- Maintain records of each call along with their Profit/Loss amount wise and percentage wise.
- Fetch performance reports publishable on your website
- Publish charts and tabular performance reports

Wealth Envoy Screen Shots

Report

19 items found, displaying 1 to 15.
[First/Prev] 1, 2 [Next/Last]

Sr No	Scrip	Profit/Loss %	Success Ratio %	Successful Tips	Total Tips	TGT1 Success Ratio %	TGT2 Success Ratio %	TGT3 Success Ratio %	SL Success Ratio %
1	ABAN	-0.7	0.0	0	1	0.0	0.0	0.0	100.0
2	APIL	8.0	100.0	2	2	0.0	0.0	100.0	0.0
3	AXIS	-3.9	0.0						
4	CAIRN	-8.5	0.0						
5	DLF	-5.7	0.0						
6	GAIL	5.5	100.0						
7	HCC	-6.9	0.0						

Graphical Report

Success Ratio(%) Report
SCHEME WISE SUCCESS RATIO (%)

Profit/Loss(%) Report
SCHEME WISE PROFIT/LOSS (%)

System Integrations

Wealth Envoy can be Integrated with the following Systems as per the required Modules / Features / Customizations:

- Trading Back Office
- Real Time Quote System
- Client Master
- Finance / Accounting System
- Organization Website

**For successful Project accomplishment we Customize and Deliver the Solution as per your Business Needs

VIBGYORtel

VIBGYORtel is a technology enabler for value added services (e.g. SMS, Email, eFax, Autodial, etc.) in Communication/Telecom industry by putting self as an example of running services using latest, sustainable & scalable software technologies and solutions. We aim to provide world wide clients with a basket of solutions for value added services in Communication/Telecom industry that gives them an edge in their business communication processes.

All our solutions are made with an inherent trait of delivering business purpose features & services making us quality focused trusted technology partner of our clients.

Aruhat Technologies Pvt. Ltd.

Aruhat Technologies Pvt. Ltd. incepted in the year 2004 in Ahmedabad, India, growing with an Annual Growth Rate of 40% since its inception has 1000+ Customers across the World and comprises of 80+ Personnels with 200+ man years of corporate experience. Aruhat's mission is 'To build a self sustainable organizational platform of growth and opportunities for employees, customers, partners and all other stakeholders'.
Aruhat caters diverse set of Global Customers & Partners and is a technology & solution enablers in a) communication services, b) security & network services, c) large scale systems implementation & integration, d) web application development & support, e) mobile application development and support and f) web data extraction.

Aruhat's current service portfolio contains SMS, eMail, Voice Message, eFax, Web Development, Web Design, Data Processing, Web Data Extraction, Data Merchandising, Implementation of Mail Servers, Ticketing Systems, CRMs, Mobile Applications for smartphones like Android, iPhone, and Blackberry.

Designed by Marketing Unit of Aruhat

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