

Streamlining Financial Operations for Enhanced Compliance and Efficiency

INDUSTRY: CORPORATE SERVICES**REGION:** USA**TECHNOLOGY:** 3RD PARTY APPLICATIONS

About the Client

A top-tier business consulting firm providing a broad range of services, including accounting, auditing, tax, and advisory services. The firm serves corporations and enterprises across various industries, offering strategic insights to drive business growth. They are recognized for their expertise in financial data management and compliance solutions.



The Business Challenge

Our client needed an efficient system to collect and manage large volumes of financial data from corporations and enterprises.

They faced challenges in integrating with tax portals and other third-party applications.



The Solution

1. Developed a Financial Data Collection Application on SharePoint Online.
2. Integrated the application with third-party systems and tax portals.
3. Leveraged SharePoint Online SPFX and the Power Platform for data collection, management, and automation.



The Benefits

- ★ **Automated Financial Processes:** Automated data collection and processing significantly reduced manual efforts and errors.
- ★ **Improved Compliance:** Integration with tax portals ensured regulation compliance and improved data handling efficiency.
- ★ **Streamlined Operations:** Faster, more accurate financial data management and reporting for the firm and its clients.



Technology Stack

Integrated with 3rd
Party Applications
and Tax Portals.