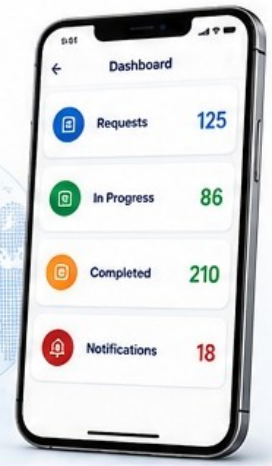
ZEROVAEGA TECHNOLOGIES

CA & INVESTMENT SERVICE MOBILE APPLICATION

Digital Transformation of Financial Consultancy & Investment Services



Financial Consultancy | Secure & Reliable | Client Transparency

Domain
Financial Consultancy | Investment Management

Platform
Android

Project Type
Mobile Application

EXECUTIVE SUMMARY

Financial consultancy delivery is fragmented across calls, emails and paper trails — slowing service requests, obscuring status, and limiting client trust. Zerovaega Technologies proposes a unified Android application that digitizes the full client-consultant iifecycle: service requests, secure document exchange, real-time tracking, payments and communication — giving the organization a scalable platform for operational efficiency and client transparency.

THE CHALLENGE

- Manual, multi-channel tracking of service requests limits visibility into progress and completion.
- No structured system for secure document collection and exchange with clients.
- Clients lack real-time transparency into pending vs. completed services.
- Client-consultant communication relies on time-consuming traditional channels.
- Payment and transaction tracking is unstructured and manual.

THE SOLUTION

- A single Android platform connecting clients and consultants end-to-end.
- Digital request creation across taxation, investment, mutual funds, insurance, loans & compliance.
- Secure document upload, exchange and management (PDF, image & business files).
- Live status tracking, notifications and in-app consultant communication.
- Integrated online payments via Razorpay with full transaction history.

EMPOWERING FINANCIAL CONSULTANCY WITH DIGITAL INNOVATION.

01 CHALLENGE & SOLUTION

BUSINESS CHALLENGE

- Manual, multi-channel tracking of service requests limits visibility into progress and completion.
- No structured system for secure document collection and exchange with clients.
- Clients lack real-time transparency into pending vs. completed services.
- Client-consultant communication relies on time-consuming traditional channels.
- Payment and transaction tracking is unstructured and manual.

PROPOSED SOLUTION

- A single Android platform connecting clients and consultants end-to-end.
- Digital request creation across taxation, investment, mutual funds, insurance, loans & compliance.
- Secure document upload, exchange and management (PDF, image & business files).
- Live status tracking, notifications and in-app consultant communication.
- Integrated online payments via Razorpay with full transaction history.

02 KEY CAPABILITIES

CLIENT EXPERIENCE

- Secure login & profile management
- Unified dashboard with quick actions
- Service request creation & history
- Feedback & service ratings

SERVICE DELIVERY

- Document upload / download hub
- Real-time request & progress tracking
- In-app consultant communication
- Online payments & transaction log

ADMIN & CONTROL

- Super admin oversight of all requests
- Department / consultant assignment
- Status updates & document requests
- Notification & announcement engine

03 TECHNOLOGY STACK

- **Mobile Application** — Native Android
- **Backend Framework** — CodeIgniter (MVC)
- **Programming Language** — PHP
- **Database** — MySQL
- **Payment Gateway** — Razorpay

04 VALUE DELIVERED

- **Faster service resolution** through structured digital requests
- **End-to-end transparency** for clients
- **Simplified compliance** & secure document exchange
- **Stronger client relationships** with real-time communication & feedback loops
- **Streamlined finance operations** with integrated payments

05 ROADMAP: WHAT'S NEXT

- Enhance AI-based document classification & auto tagging.
- Introduce multi-language support.
- Advanced analytics dashboard for service insights.
- Expand integrations with other financial platforms.

ONE PLATFORM. COMPLETE CONTROL. BETTER CLIENT EXPERIENCE.