



Objective

PEAK is an AI and cloud solutions company having headquarters in Manchester, UK. It wanted to implement a Portfolio Management System for financial institutes with a multi-tenant system. A user should be able to upload the Trial Balances and Budgets of the financial institutes. The system should parse the files, store the data from those files and ultimately do the financial calculations on that data. User should be able to map the headers, create new custom headers and new formulae. Once reports are generated, they are to be displayed to the user and user can either reject or confirm the reports. Activity logs pertaining to the report generation and report status (saved, confirmed, rejected) are to be maintained.

Scope

VAST developed a fully AWS serverless solution. User onboarding and authentication was to be done by communicating with the other PEAK system.

Challenges

- Ascertaining the nitty-gritties of the report data calculation.
- We spent considerable amount of time in communicating with the PEAK BAs to understand the exact financial requirements.
- Getting the serverless offline setup ready as per Peak's standard.

Benefits

UI design is responsive and user friendly. Headers mapping, report generation, calculations are seamless. Budget data is being parsed and stored for future reference.

Key features

- Pload functionality for files in xls, xlsx, csv and txt format.
- Headers mapping, headers storing.
- Parsing the Trial Balance templates and actual data files.
- Reports calculations.
- Budget parsing and data storing.
- Activity logs.

Technology

- Node.js
- Serverless AWS lambda
- Serverless offline for testing
- AWS Dynamodb
- ReactJS
- Material UI

<https://peak.ai/>