



Community Platform for Financial Service Provider

Highly secured financial service platform with 2-factor authentication.

Location	INDUSTRY	SOLUTION(S)
Austin, Texas, USA	Technology	Community Cloud

COMPANY OVERVIEW:

Covidi is an Austin Texas-based technology company that helps small & medium scale companies get the best out of their Sales & Service Cloud Implementations to automate key business processes.



CHALLENGES :

- Our partner was looking to build a community platform for end-users using which they can get details of their financial information related to the 401k plan.
- The platform must be highly secure as there will be highly sensitive data related to customers and their financial information.
- The platform should be highly seamless and user-friendly keeping users from different backgrounds in mind.

SOLUTION :

- We built the solution using which community users can create an account for them & can navigate to their 410k financial service provider's system without logging in separately.
- They can directly access their financial information, view status, plan-related information, etc. using the system.
- In order to ensure security, we implemented 2-factor authentication including OTP based login using Twilio integration.



RESULTS :

- The platform really helped community users access their 401k plan without performing multiple system logins ensuring the highest security.

About CEPTES

With over 15 years of expertise, CEPTES is a certified Salesforce Summit Partner serving 1000+ esteemed client globally. We have delivered innovative solutions, having completed 1200+ successful projects across 15+ industries with unwavering commitment to client satisfaction.

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