

FILEMAKER PRO CASE STUDY

D.W. PAGE

David W. Page offers in-depth expertise and financial guidance for individuals interested in building their wealth and managing it into the future. David has over 45 years of experience to help guide you, educate you, and help you make the right financial decisions. Get access to solutions to manage your wealth better and protect your financial future.





SMART DATABASE SOLUTIONS WITH FILEMAKER PRO

D.W. Page reached out to Neo Code for being one of the most experienced Canadian companies in implementing FileMaker Pro database solutions. David needed to enhance and strengthen the already built database system in place to better serve and manage their client accounts. This included making the database more efficient and relevant to changing market and regulatory requirements to keep up with compliance.

The Challenge

The biggest challenge for any industry nowadays revolves around being able to incorporate technology and personal relationships with clients. This was also an important aspect of how D.W. Page wanted to use and manage their database to fuel client satisfaction. The continued partnership with Neo Code helps the team to utilize custom scripts to better record and manage client accounts, therefore increasing team communication and productivity. The Filemaker Pro database can now save the whole team a lot of processing time to focus on what matters - growing client relationships.

One of the best examples of what Filemaker Pro offers D.W. Page is the ability to easily make system-wide account adjustments according to market fluctuations by applying a master amount to help seamlessly process all accounts at once instantly. As all accounts are fully digital, secure, and protected, hours and hours of work are saved.

It takes time to implement a custom solution but it is well worth it; tremendously increasing your productivity. Look at the cost as really investing in your business and yourself. Extremely happy with the quick responses from Neo Code. They are very knowledgeable and have come up with solutions for everything I have wanted to do. - David Page



Instead of the average of 7 to 10 days to complete tasks for all client accounts, it is now completed in 1 to 3 days!

200%

STAFF EFFICIENCY

How Neo Code Solved The Problem

Neo Code assisted D.W. Page in keeping their database up to date with all the required licensing needs. The original financial database has now been transformed into a user-friendly layout that the team can easily upload data all in one central place. Now D.W. Page can continue to increase their business capacity for new clients and services. There is now a huge potential to grow exponentially and outpace the competition, as the database provides all required information at the team's fingertips, quickly responding to client requests or changing environmental and social changes.



Neo Code is a full-service custom software provider with FileMaker developer experts that focus on creating robust, reliable, powerful solutions that are right for your needs. Neo Code is one of only 5 Claris Platinum Partners in Canada, and the creators of fmLifeBoat - a database rescue service. Contact us for FileMaker development and rescue.

Joshua Paul
joshua@neocode.com

1-888-748-0668
www.neocode.com

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