



Never file or lose your document again.



Team Composition:

1 Technical lead, 1
Hardware Engineer,
2 Full Stack Engineers



Project Duration:

Ongoing (Support and
Maintenance)



Tech Stack:

Python, Django,
Rest API, Amazon
SES

Project Overview

Upmonth is an AI-powered document management system for investors and investment firms. It automates email and file organization, using machine learning and NLP to enable instant discovery and reduce operational overhead.

Business Challenges

- **Inconsistent Fund Name Patterns:** Lack of structure made searching and managing documents inefficient
- **Non-descriptive or Long Tickers:** Led to manual entry errors and slowed fund identification
- **Non-unique Tickers:** Caused data integrity issues and confusion across systems
- **Inefficient Architecture:** Legacy backend limited scalability and performance

Solutions Delivered

- **Automated Testing & AWS SES:** Improved reliability by reducing manual testing and automating email workflows.
- **Smart Ticker Generation:** Applied NLP and normalization to generate unique, meaningful tickers.
- **Backend Revamp:** Developed a scalable Django backend with robust REST APIs and a centralized ticker database.
- **System & Persona Mapping:** Closed functional gaps through event storming and example mapping.

Results & Impact

- **Drastic reduction in document duplication** and folder overload
- **Enhanced investor experience** through rapid file access and accurate search
- **Optimized document lifecycle management** with automated version control
- **Robust compliance, data integrity,** and secure access for regulated environments
- **Significant reduction** in admin overhead and operational costs

Conclusion

- Upmonth transforms the chaotic reality of document management in investment offices into a streamlined, automated, and intelligent system. **With Techverx's development expertise, Upmonth has evolved into a high-performance platform that saves time, reduces costs, and enhances operational precision**—making it an essential tool for modern financial teams managing complex data at scale.