# Success Story #56

**Client**
Regional Securities Firm

**Problem**
The company maintained 5 separate lists of traders at client firms and the stocks in which they were interested, so that the individuals could be contacted when there was a significant movement in the price of a stock on their "watch list". These lists were in paper format, making location of the correct trader/stock combination cumbersome. Additionally, the client firm wanted a method of sending each trader a quick broadcast email when movement in a security warranted, and wanted the ability to check their internal email from the trading floor as well.

**Solution**
Because of the multitude of goals established by the company, it was determined that Personal Digital Assistants (PDAs) would provide the technology necessary to support the development efforts required to implement the desired solutions. Business Solutions developed a prototype tracking application for the PDA platform designed to replace the paper-based system. After detailed business analysis, it was determined that the Windows platform would provide better integration with existing email packages. The final application developed by Business Solutions enabled the traders to lookup stocks by symbol or company name via the PDA web browser and locate interested client traders and vice-versa. An alert email can be sent directly to the client in question with a simple tap of the stylus. The application also contains phone numbers of the clients, so a phone call can be made to the individual if warranted. Each handheld device was set-up to synchronize with Microsoft Outlook, so that employees could receive their internal email and have access to their personal contact lists while on the floor of the exchange. The entire development cycle – from prototype to implementation – took less than 30 days, and the solution has slashed the amount of time and resource traditionally spent locating the correct trader/stock combinations on paper. It has also provided the staff with the ability to access vital information real-time from their positions on the floor, saving the need to find an available terminal to access email and contact information.

**Technology Applied**
ASP Pages, Java Script, SQL Server, Windows CE, Microsoft Outlook