Autogenerate Hierarchies
for Clarity

The Hierarchies functionality is a great feature from Clarity that allows the easy creation and editing of investment hierarchies on the fly. There is however some automation opportunities to improve on this feature and that's where our Autogenerate Hierarchies come in. Optovia's Autogenerate Hierarchies enables the user to generate hierarchies by defining business rules and/or using existing investment data. The hierarchies dependencies are then generated, automatically, based on the rules and options established by the user.
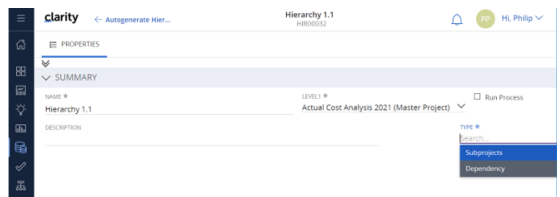
Why do we need the Autogenerate Hierarchies?

While Clarity's Hierarchies are a powerful utility that enables the definition of relationships between various investments, there is a fair amount of manual activity required – both when creating a hierarchy and maintaining it. With the Autogenerate Hierarchies, a lot of the manual work is eliminated! This newly developed innovation takes care of all this. With the click up a button, the links and dependencies between each investment are automatically and seamlessly brought in.

The Autogenerate add-on saves time, drives automation and increases the hierarchy's utility capability.

User-friendly Technology

The Autogenerate Hierarchies is straightforward and easy to use. This add-on can be accessed from the main menu and from there a few business rules and field values need to be defined. Once that is completed, you can further customize by adding how often you would like the process to run and how often you would like to hierarchies updated. It is as easy as that!

Autogenerate Hierarchies Value

○ Automates hierarchy creation

○ Synchronization of any changes to a custom investment and any dependencies

○ Reduces user effort/time requirements

○ Automates Hierarchy maintenance

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