

BizMyte – Project & Architecture Overview Document

This document provides a consolidated overview of the BizMyte platform, combining the Business & Functional Requirements with the underlying Azure Infrastructure Architecture. It is intended for client stakeholders, enterprise IT teams, and audit/compliance review purposes.

1. Client Overview

Client Name: BizMyte

Industry: Financial Services / Client Advisory

Project Type: AI-Powered Agent Portal

BizMyte engaged our team to design and implement an intelligent agent portal that consolidates client management, meeting intelligence, task tracking, financial tools, and AI assistance into a single unified platform.

2. Business Problem & Objective

Agents previously relied on multiple disconnected systems such as CRMs, spreadsheets, calendars, and notes. This resulted in inefficiencies, missed follow-ups, and inconsistent client engagement.

The objective of BizMyte is to provide a centralized, AI-powered workspace that improves productivity, enhances client interactions, and supports data-driven decision-making.

3. Solution Overview

BizMyte acts as a single command center for agents by integrating client lifecycle management, meetings, tasks, calculators, and an AI assistant. The platform automates documentation and surfaces intelligent insights directly within agent workflows.

4. Scope of Implementation

- Secure agent authentication and access
- Dashboard with real-time operational insights
- End-to-end client lifecycle management
- Smart meeting scheduling with AI-generated summaries
- Priority task and follow-up management
- Financial calculators for advisory support
- AI Assistant with contextual awareness and RAG
- Secure logout and session management

5. Functional Requirements Summary

- Secure login and role-based access control
- Dashboard view of clients, meetings, and tasks
- Client onboarding and profile management

- Meeting scheduling, tracking, and AI summarization
- Automated action items and follow-ups
- Task creation, prioritization, and completion
- Financial calculators for client discussions
- AI Assistant for insights, summaries, and recommendations

6. Non-Functional Requirements

- Enterprise-grade security and data protection
- Scalable and high-availability architecture
- Responsive and user-friendly interface
- Compliance with data privacy and enterprise standards

7. Azure Infrastructure Architecture

BizMyte is deployed on Microsoft Azure using a VM-based containerized architecture. All application services run inside Docker containers hosted on a dedicated Virtual Machine.

7.1 Compute Layer & Networking

- Virtual Machine (agenda-1): Primary runtime environment hosting containerized services
- Virtual Network (VNet) for network isolation
- Network Security Groups (NSG) for traffic control
- Network Interface and Public IP for controlled access

7.2 Data Layer

- Azure SQL Server & SQL Database for structured data
- Azure Cosmos DB for unstructured data
- Azure Storage Account for documents and artifacts

7.3 AI & Cognitive Services

- Azure OpenAI Service for AI Assistant and summarization
- Azure AI Search for semantic search and RAG

7.4 Security

- Azure Key Vault for secret management
- Managed Identities for secure service access

8. Technology Stack

- Frontend: Web-based UI (React + Vite / Modern JS Framework)
- Backend: API-based architecture (Python-3.11.9)
- AI: Azure OpenAI Service
- Search: Azure AI Search with Vector Embeddings
- Database: Structured + Unstructured Data Stores
- Security: Authentication & Authorization layers

9. Business Value Delivered

The BizMyte platform significantly reduces operational effort, improves agent productivity, enhances meeting preparedness, and drives better client engagement. The architecture supports enterprise scalability, security, and compliance requirements.

10. Architecture Diagram

