CHAT BOT DEVELOPED USING LANGCHAIN
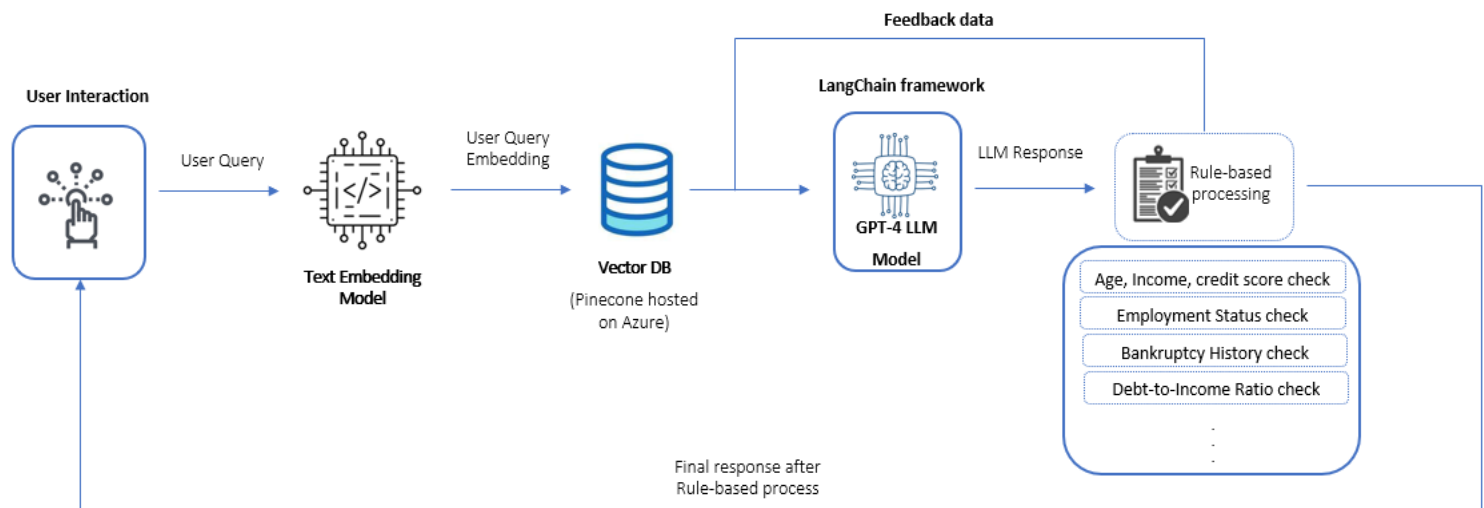
MAY 2024

Request and Guidlines Provided

• Client: Commercial Bank

• To expedite the process of loan application eligibility check, which involves multi-stage human involvement

• A chatbot is introduced to enhance the customer experience by providing real-time status updates, loan eligibility validation, and accurate and timely responses following predefined rules and guidelines consistently

Methodology and Final Deliverable

• Chatbot UI is provided in the Web application which allows the users to submit queries with little relevant information which is used for validation
  − The user-submitted queries are embedded using the Text embedding model for retrieving the relevant response
  − The user query embeddings are then submitted to Vector Database(Pinecone) which is hosted on Azure
  − Further it is processed to GPT-4 LLM model to generate the response according to the prompts submitted
  − The output is then validated against the Rule-based check mechanism based on different companies and the result is passed to the User
  − Once the response is sent to the end-user we have the Feedback mechanism from the user which helps us to fine-tune the LLMs and result in the most accurate information

DATA INTELLIGENCE GROUP

TresVista
Catalyzing Your Impact

Enabling our clients to achieve resource optimization through leveraging an offshore capacity model

Our Highlights

- Worked with 1,000+ Clients
- From Emerging to Established Firms
- Servicing Clients in 80+ Countries
- Across Industries and Asset Classes
- Client-Integrated Operating Strategy

Why Partner With Us

HR Solution
- Flexible Staffing Model
- Dedicated Tiered Team Support

Quality
- Industry-Leading Talent
- Multiple Layers of Quality Checks

Operating Leverage
- Centralized Resource Pool
- Integration across Value Chain

Cost Efficiencies
- Lower Indirect Costs
- Meaningful Direct Cost Savings

What We Do

Private Equity and Portfolio Companies

- Data Sourcing and Engineering
  - Capturing Data from Portfolio Companies
  - Creating Data Pipeline Enabling Automated Data Flows
- Reporting and Automation
  - Dashboard and Reports for Performance of Portfolio Companies
  - Fund Summary Reports for Investors
  - Process Optimization and Automation

Capital Markets

- Data Sourcing and Engineering
  - Capturing and Processing Disparate Datatypes from Multiple Data Sources
  - Data Sanitization, Curation, and Data Pipeline Creation
  - Creating Databases, Data Lakes, and Data Warehouses & Ingesting using ETL/ELT Jobs
- Data Analytics, Reporting, and Automation
  - Customized Analytics
  - Key Indicators, Thresholds, Alerts, and Controls
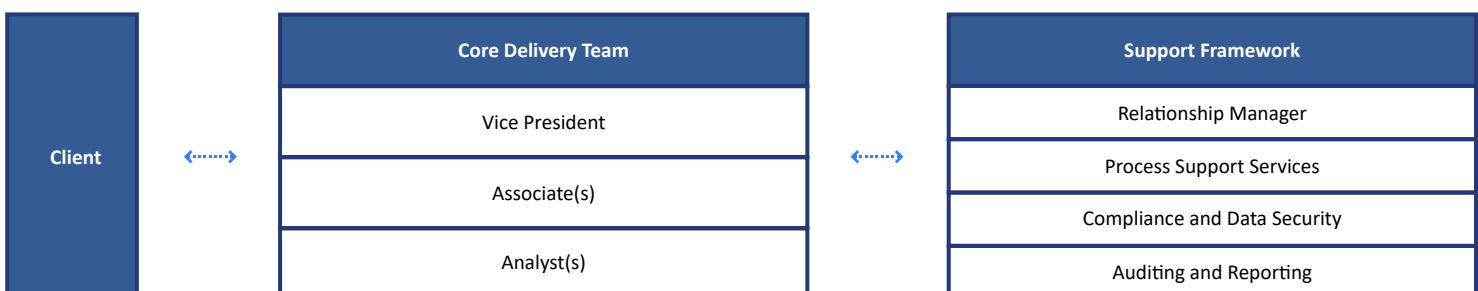 - Robotic Process Automation

Corporates

- Data Sourcing, Design, Architecture, and Storage
  - Capturing, Sanitizing, and Ingesting Disparate Datatypes from Multiple Data Sources using Data Model and Data Flow Diagrams
  - Creating and Maintaining Databases, Data Lakes, Data Warehouses, and Data Marts
- Data Analytics, Reporting, Governance, and Automation
  - Customized Analytics and OLAP Processing
  - Key Indicators, Thresholds, Alerts, Controls, and Data Governance
  - Robotic Process Automation and Artificial Intelligence

Data Vendors

- Data Sanitization and Enrichment
  - Creating Rules and Alerts
  - Enrichment of Data using Fuzzy Logic
- Data Reporting, Automation, and Governance
  - Dashboard and Reports for Performance of Portfolio Companies
  - Master/Meta Data Management, Data Lineage, and Access Controls

How We Do It

Client		Core Delivery Team	Support Framework
		Vice President	Relationship Manager
		Associate(s)	Process Support Services
		Analyst(s)	Compliance and Data Security
			Auditing and Reporting

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