

Interface.ai Solution Architect Demo

Prepared by: Jay Sibel

Today's Date: June 17th, 2025



1. Start Interaction

- **Greeting**
 - **System:** *"Hello, thank you for calling ACME Credit Union. How can I assist you today?"*
 - **User Response:** User will provide an intent (Balance Inquiry, Payment, or Loan Status).
 - **If:** User mentions balance → **Account Balance Inquiry Flow.**
 - **If:** User mentions payment → **Making a Payment Flow.**
 - **If:** User mentions loan status → **Loan Status Check Flow.**
 - **If:** User's query is unclear → **Clarification Flow.**
-

2. Account Balance Inquiry Flow

- **User:** *"I'd like to check my balance."*
 - **System:** *"Sure! Please specify the account type: checking or savings?"*
 - **User Response:** User provides account type (Checking/Savings).
 - **If:** User says "Checking" → **Account Balance.**
 - **If:** User says "Savings" → **Account Balance.**
 - **If:** User provides anything else → **Clarification Flow.**
 - **System:** *"Your [account type] account balance is \$X.XX. Would you like to do anything else?"*
 - **User Response:** User either asks another query or ends the call.
 - **If:** User wants to continue → Go back to the Start Interaction.
 - **If:** User ends the call → **End Interaction Flow.**
-

3. Making a Payment Flow

- **User:** *"I want to make a payment."*
 - **System:** *"What type of payment would you like to make? (e.g., loan, credit card, utility bill)"*
 - **User Response:** User specifies payment type (e.g., Credit Card, Loan).
 - **If:** User mentions Credit Card → Go to Credit Card Payment Flow.
 - **If:** User mentions Loan → Go to Loan Payment Flow.
 - **If:** User mentions Utility Bill → Go to Utility Bill Payment Flow.
 - **If:** User mentions anything else → **Clarification Flow**.
-

Credit Card Payment Flow

- **System:** *"How much would you like to pay towards your credit card balance?"*
- **User Response:** User provides payment amount (e.g., \$200).
- **System:** *"How would you like to make this payment? From your checking or savings account?"*
- **User Response:** User specifies payment source (Checking/Savings).
 - **If:** User says "Checking" → Proceed to Payment Confirmation.
 - **If:** User says "Savings" → Proceed to Payment Confirmation.
 - **If:** User provides anything else → **Clarification Flow**.
- **System:** *"Your payment of \$200 will be made from your [specified account]. Is that correct?"*
- **User Response:** User confirms or cancels.
 - **If:** User confirms → **Payment Confirmation**.

- **If:** User cancels → **End Interaction Flow.**
-

Payment Confirmation Flow

- **System:** *"Payment successful! Your new balance is \$X.XX."*
 - **User Response:** User asks for more actions or ends the call.
 - **If:** User wants to do more → Go back to Start Interaction.
 - **If:** User ends the call → **End Interaction Flow.**
-

Loan Payment Flow

- **System:** *"How much would you like to pay towards your loan balance?"*
- **User Response:** User provides payment amount (e.g., \$500).
- **System:** *"How would you like to make this payment? From your checking or savings account?"*
- **User Response:** User specifies payment source (Checking/Savings).
 - **If:** User says "Checking" → Proceed to Payment Confirmation.
 - **If:** User says "Savings" → Proceed to Payment Confirmation.
 - **If:** User provides anything else → **Clarification Flow.**
- **System:** *"Your payment of \$500 will be made from your [specified account]. Is that correct?"*
- **User Response:** User confirms or cancels.
 - **If:** User confirms → **Payment Confirmation.**
 - **If:** User cancels → **End Interaction Flow.**

Utility Bill Payment Flow

- **System:** *"How much would you like to pay towards your utility bill?"*
- **User Response:** User provides payment amount (e.g., \$100).
- **System:** *"How would you like to make this payment? From your checking or savings account?"*
- **User Response:** User specifies payment source (Checking/Savings).
 - **If:** User says "Checking" → Proceed to Payment Confirmation.
 - **If:** User says "Savings" → Proceed to Payment Confirmation.
 - **If:** User provides anything else → **Clarification Flow**.
- **System:** *"Your payment of \$100 will be made from your [specified account]. Is that correct?"*
- **User Response:** User confirms or cancels.
 - **If:** User confirms → **Payment Confirmation**.
 - **If:** User cancels → **End Interaction Flow**.

4. Loan Status Check Flow

- **User:** *"I'd like to check the status of my loan."*
 - **System:** *"Please provide your loan type and loan ID."*
 - **User Response:** User provides loan type and loan ID (e.g., "Mortgage, loan ID 12345").
 - **If:** User provides valid loan type and ID → **Loan Status Response**.
 - **If:** User doesn't provide loan type or ID → **Clarification Flow**.

- **System:** *"Your mortgage loan application is currently in review. Would you like to track any other applications?"*
 - **User Response:** User either asks another query or ends the call.
 - **If:** User wants to continue → Go back to the Start Interaction.
 - **If:** User ends the call → **End Interaction Flow.**
-

5. Clarification Flow

- **System:** *"Sorry, I didn't catch that. Could you please clarify your request?"*
 - **User Response:** User rephrases the query.
 - **If:** User provides a valid query → Proceed with the appropriate flow (Balance Inquiry, Payment, or Loan Status).
 - **If:** User still provides an unclear query → End Interaction with a message like, *"I'm sorry, I couldn't understand. Please try again later."*
-

6. End Interaction Flow

- **System:** *"Thank you for calling [Bank/Credit Union]. Have a great day!"*
 - **End:** Call ends.
-