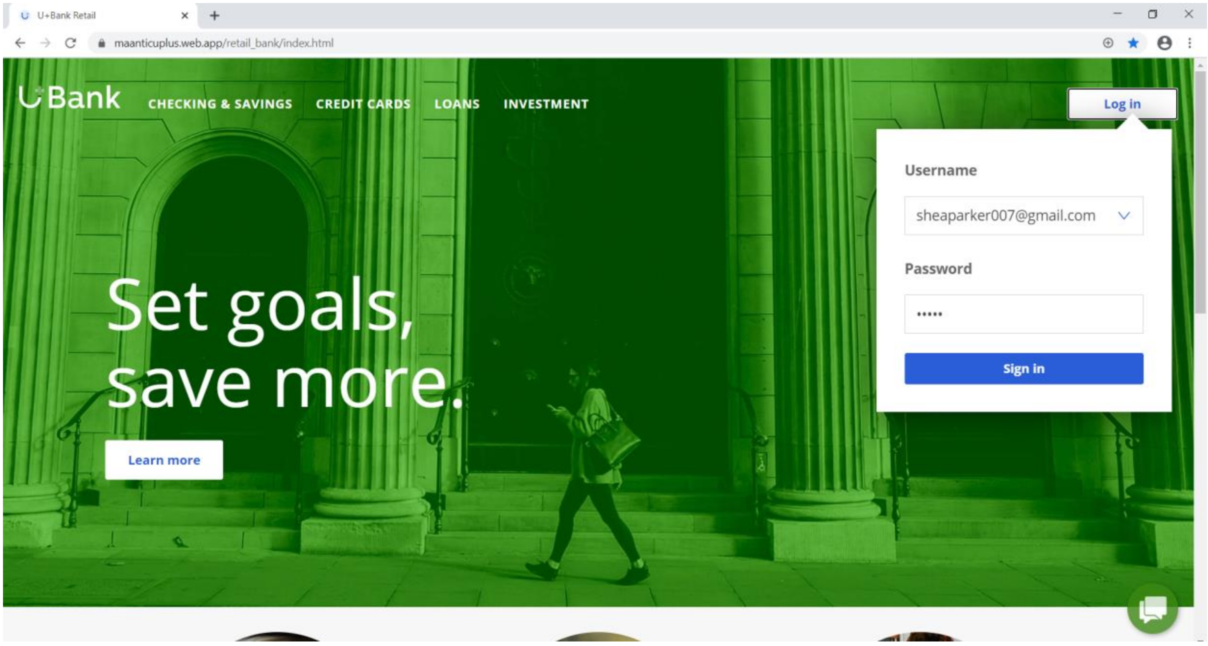
Test Scripts

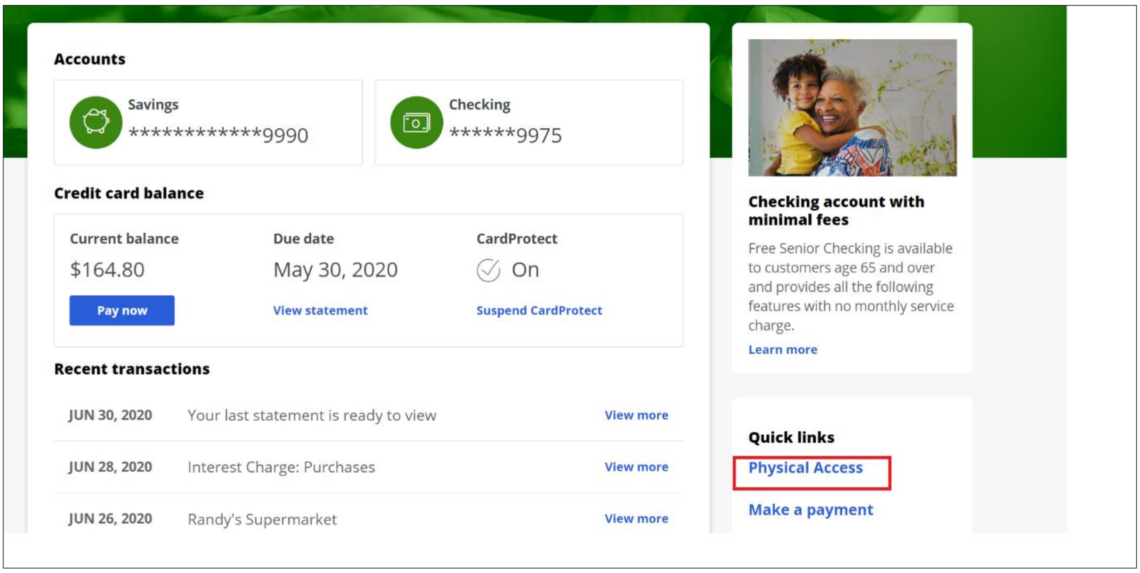
Scenario-1: Emergency Physical Access

1. Log into the URL https://maanticuplus.web.app/retail_bank/index.html (website of U+ Bank) with the credentials below: **sheaparker@gmail.com/rules.**

   Shea Parker is an existing customer of U+ bank who wants to raise a request for accessing her safety deposit box in the bank



2. Click on the "Physical Access" link from the "Quick links" section



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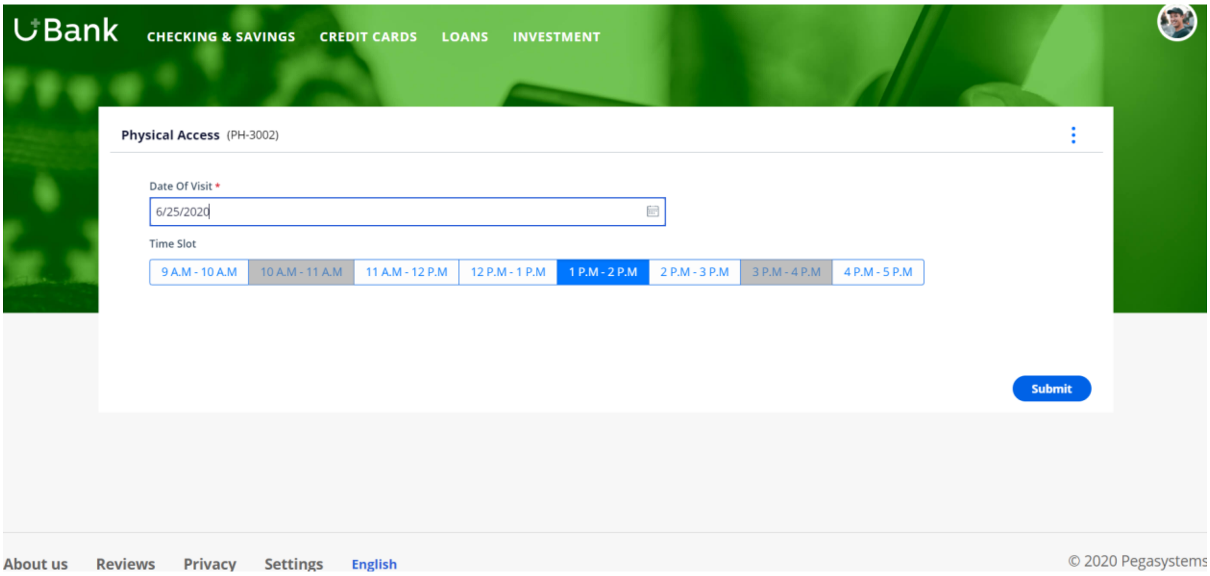
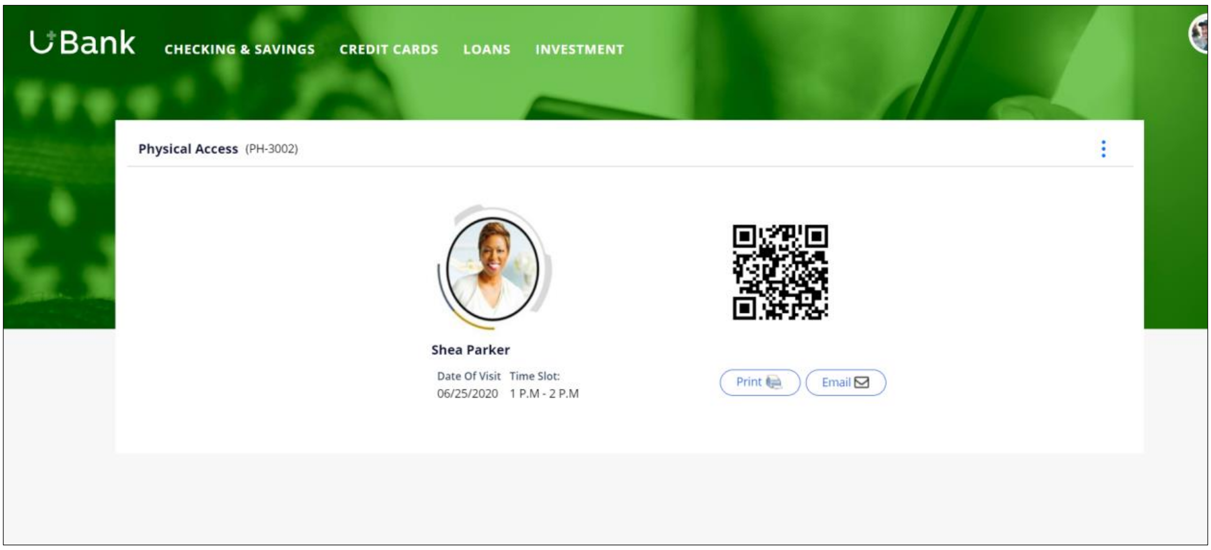
3. Select the Date of Visit and Time Slot and then click on Submit.
   For demo purpose, we have not implemented the functionality of availability of dates/timeslots based on the already selected ones. The greyed-out time slots are pre-selected for demo purpose.



4. QR code is generated which the customer can print or email before visiting the branch.



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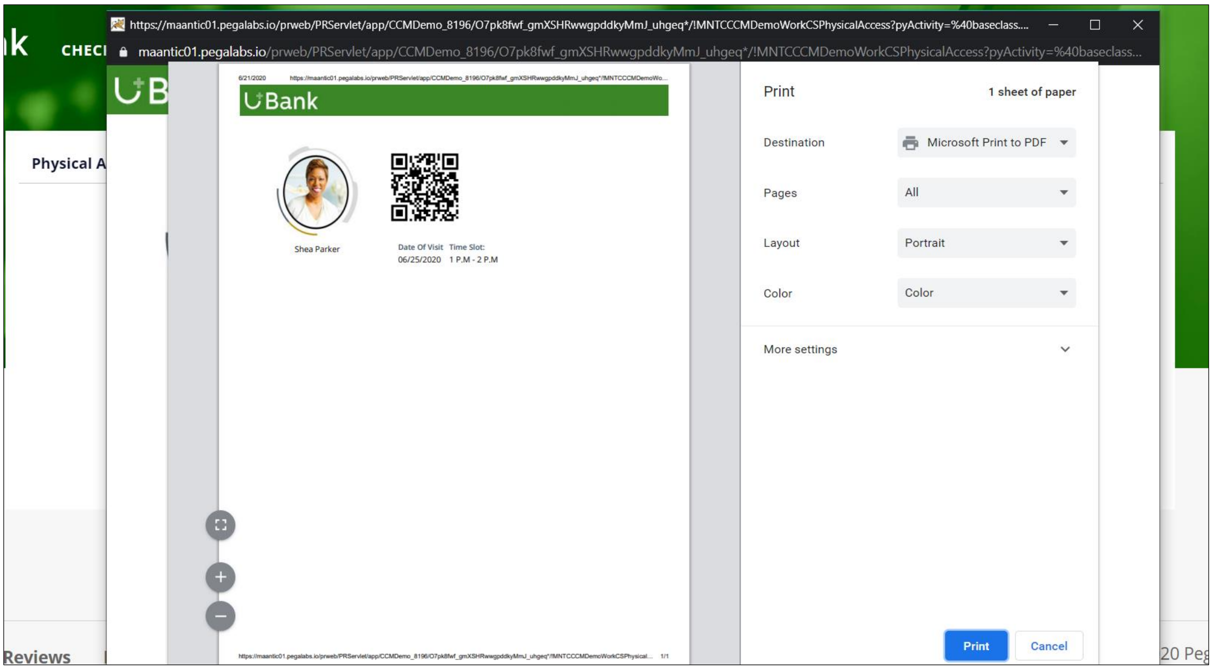
5. The Print preview of QR Code.

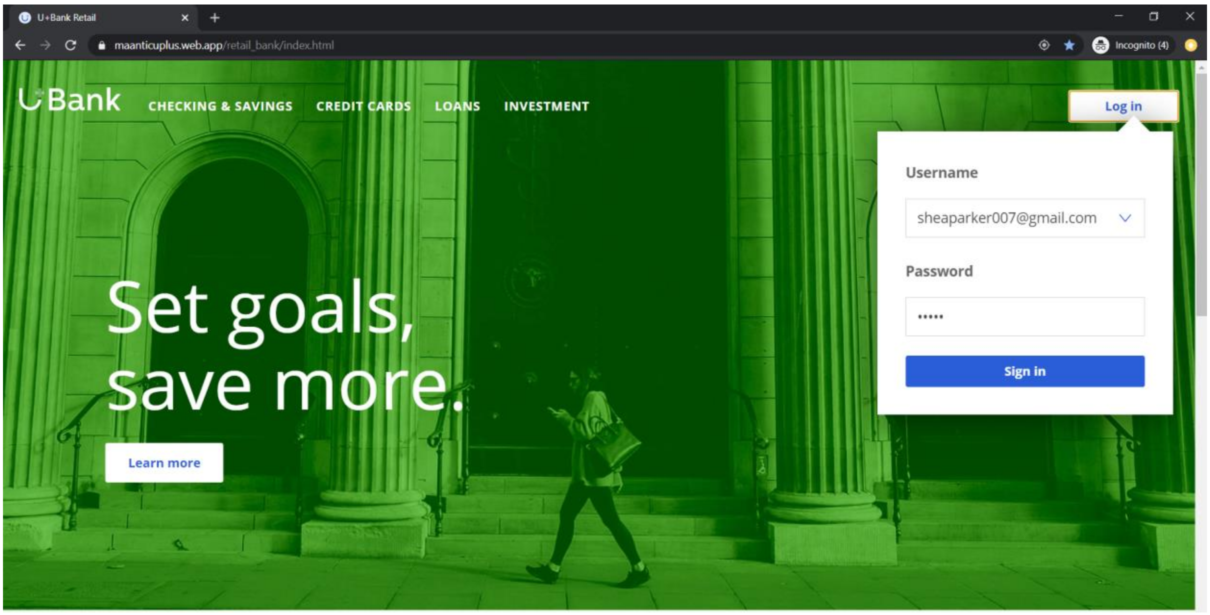


Test Scripts

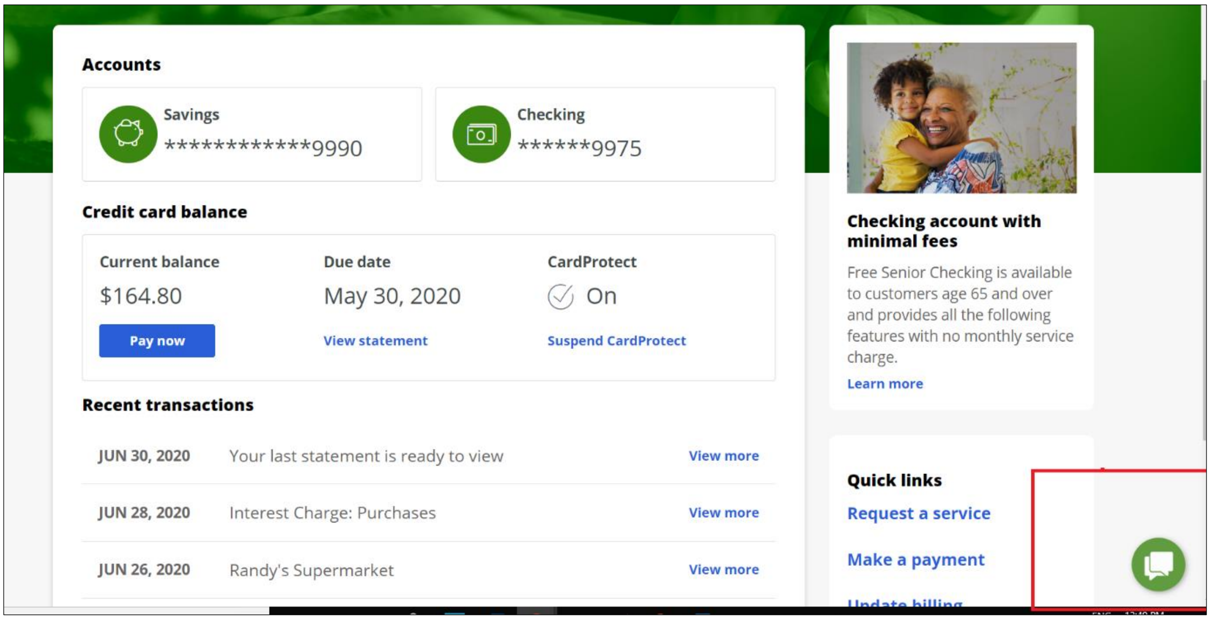
Scenario 2: Empower Remote Workforce

In this scenario, Shea as customer needs some help on her financial need analysis and wants to discuss her investment plans with some Financial Advisor/Executive in the bank. She initiates the discussion through ChatBot of U+ Bank and Pega ChatBot seamlessly transfers the session into Chat with available Financial Advisor who immediately starts face-to-face video conferencing with Shea

1. Log into the URL https://maanticuplus.web.app/retail_bank/index.html with the credentials- **sheaparker@gmail.com/rules** **(As Customer)**



2. Click on the Green Chat icon from the bottom right corner.



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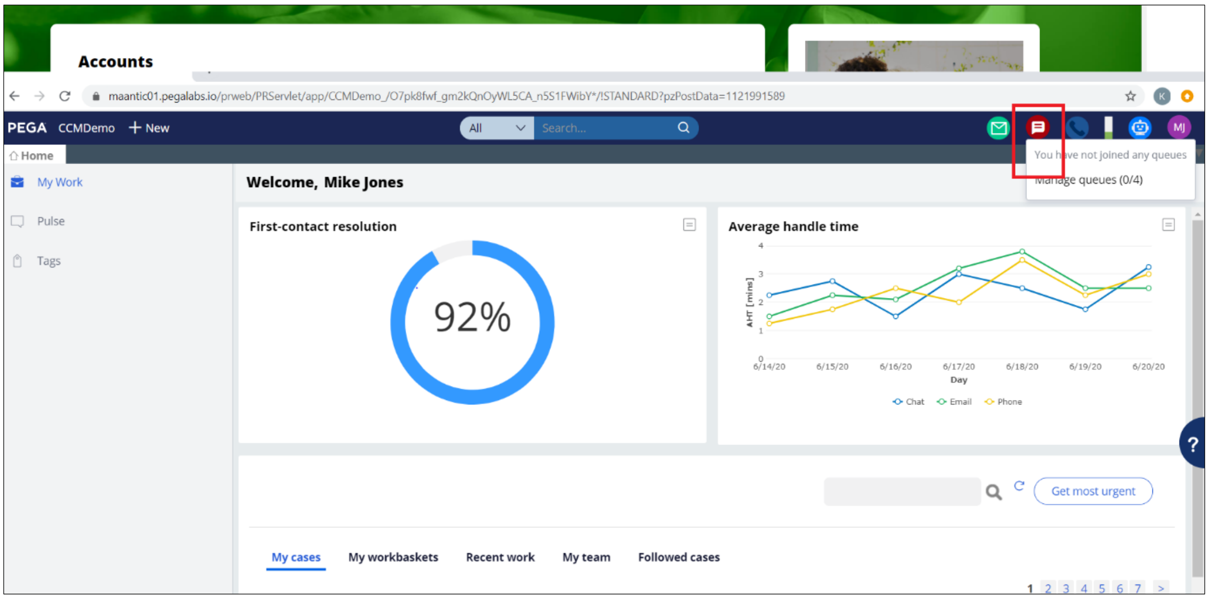
3. Since for the demo purpose SSO has not been configured, initiating ChatBot from the portal would challenge for credentials through Pega login screen. Please login with any of the model users given below. After logging in please refresh the window with the same URL https://maanticuplus.web.app/retail_bank/index.html.

   Credentials-

   CCMChatBotModel10/install@123
   CCMChatBotModel11/install@123

4. Log in to the URL as Financial Advisor https://maantic01.pegalabs.io/prweb/PRServlet with the below credentials. The name of our Financial Advisor is Mike Jones.
   mikejones/install@123

5. Click on the Red Chat Icon→Manage queues→Select FNA (Financial Need Analysis)→Click on Save. The queue FNA has been designed to receive chat requests related to financial advise and would always redirect to available executive in the back-office



6. Once the red chat icon has become Yellow colored. Click on Make me available.

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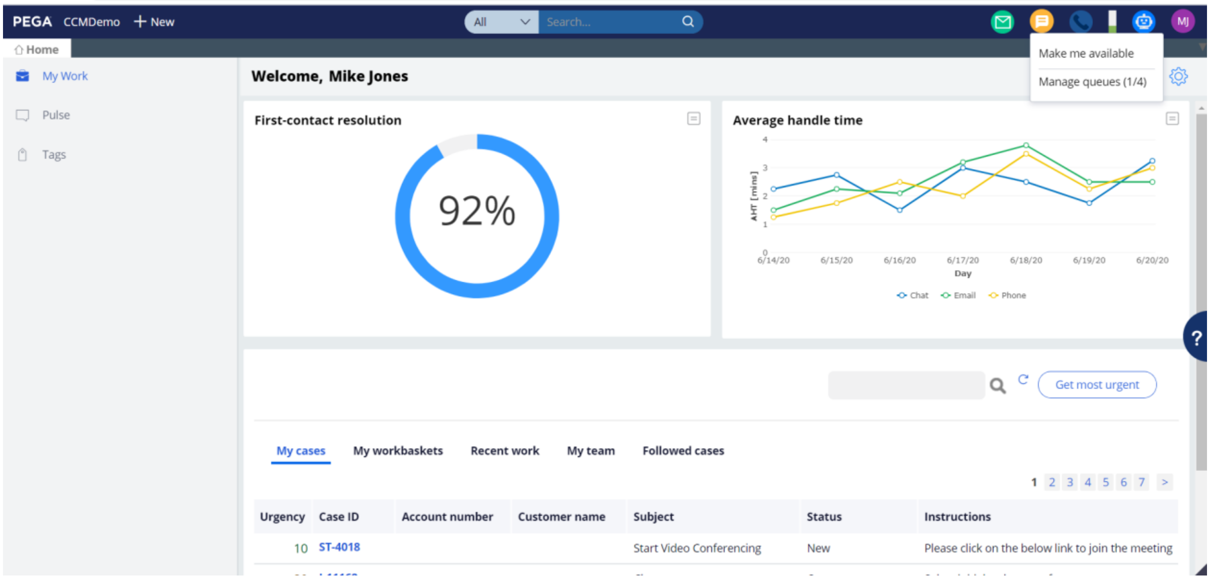
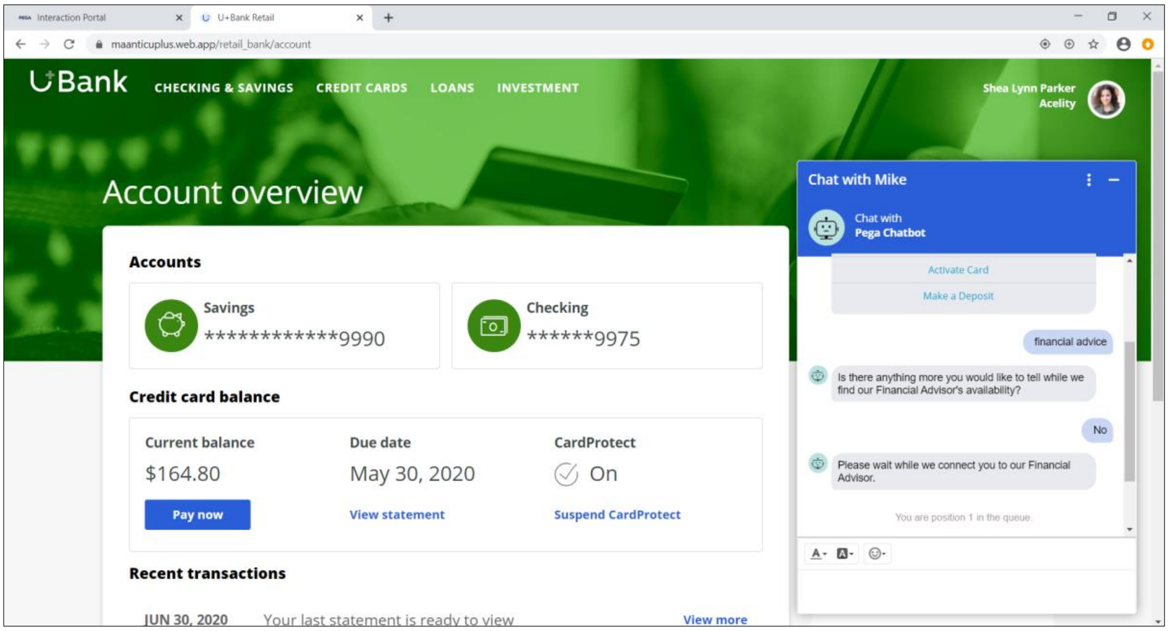


7. Now the chat icon has become green. That means that Financial Advisor is available to chat.

8. Now click on Financial Advice in the menu and the chatbot will transfer the customer to an available financial advisor queue.



9. The Financial Advisor will get an incoming chat popup like below.

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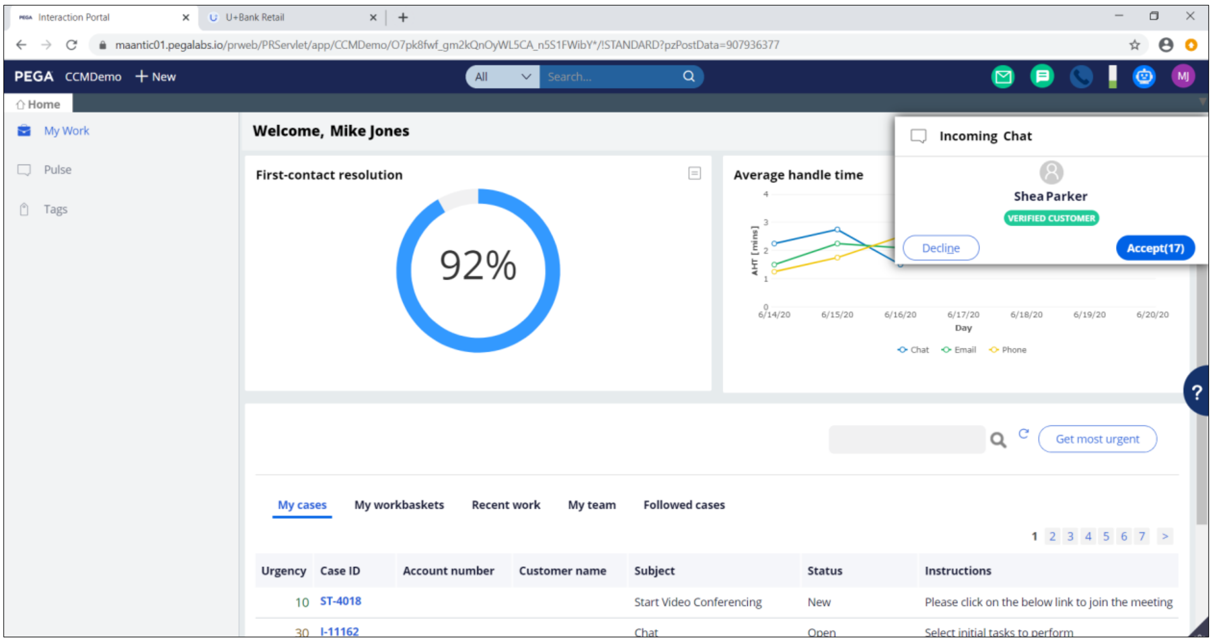
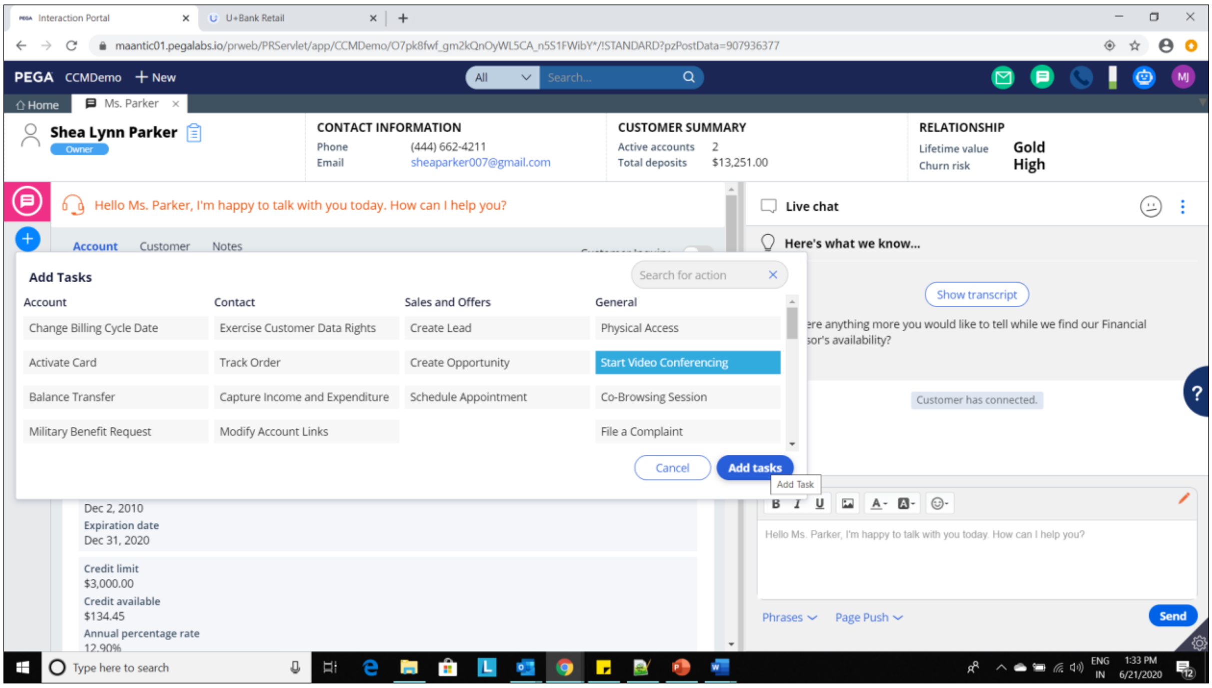


10. Once the Financial Advisor clicks on "Accept" button, 360 view of the customer is being displayed. Click on + icon on the left panel. Click on Add Task. Select Start Video Conferencing. Click on Add tasks button.



11. It will initiate a service case of video conferencing. Since the MS Teams which we have used for demo purpose does not have an audio license, the calling numbers were not available. Therefore dummy values have been updated in the screen.

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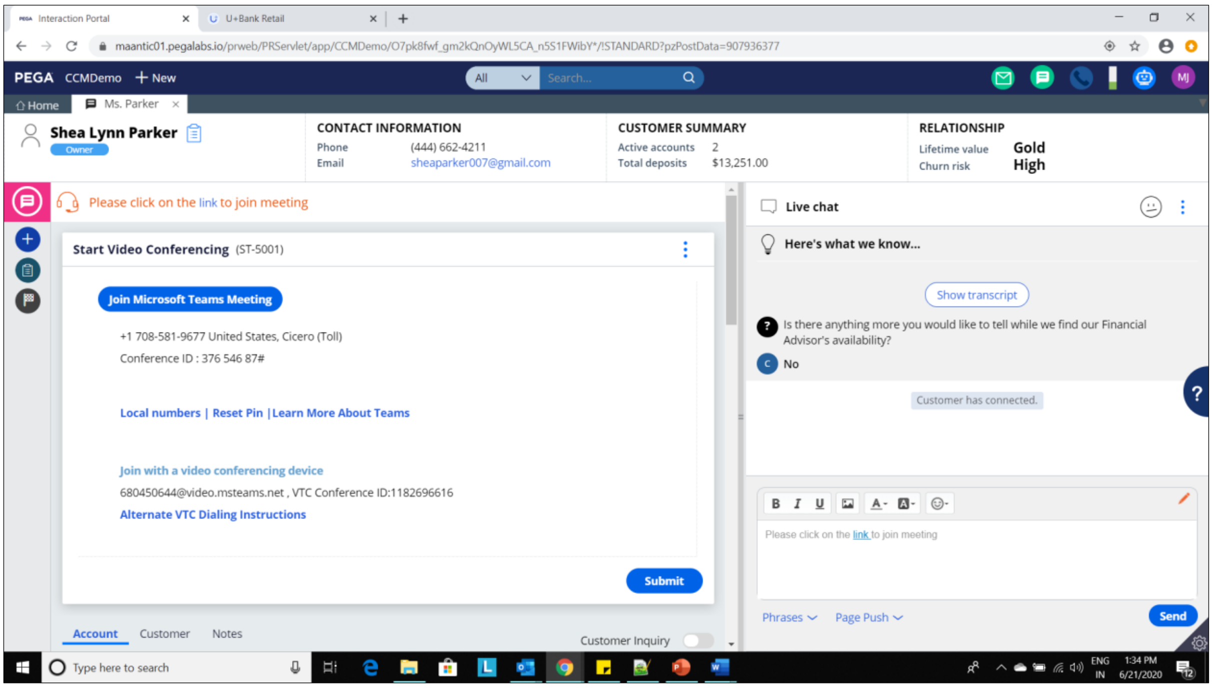
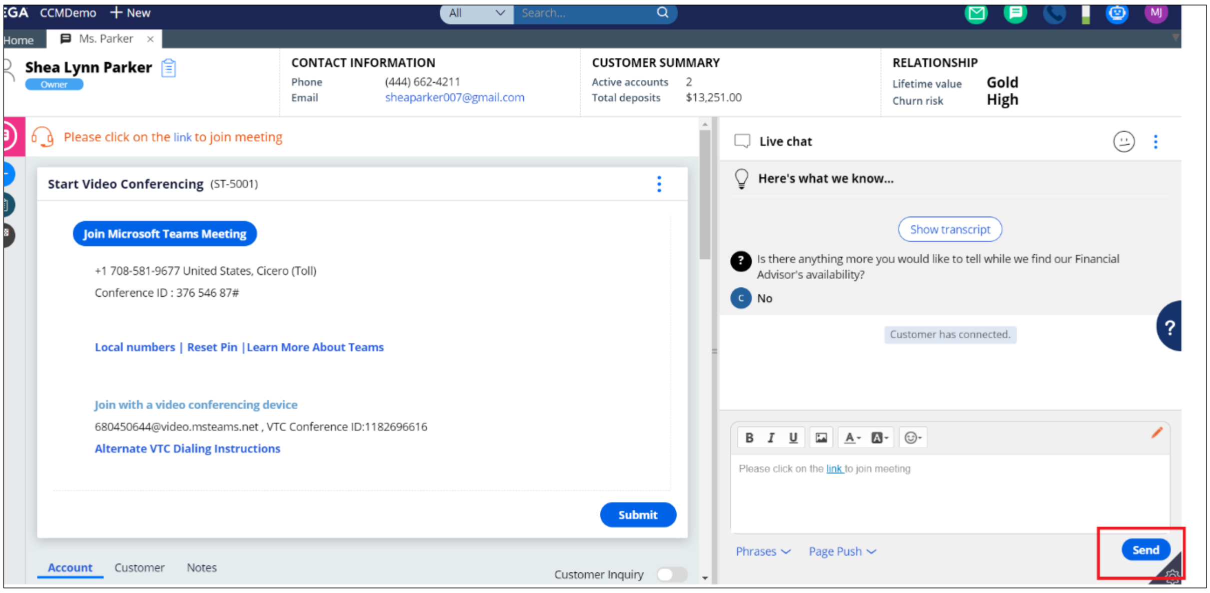


12. Push the link from the chat panel on the right-hand side to send it to the customer, so that the customer can click on the link and join video conferencing.



13. Click on the button Join Microsoft Teams Meeting. By clicking on this link, the Financial Advisor joins the Teams Meeting. Click on Join Web Instead Button.

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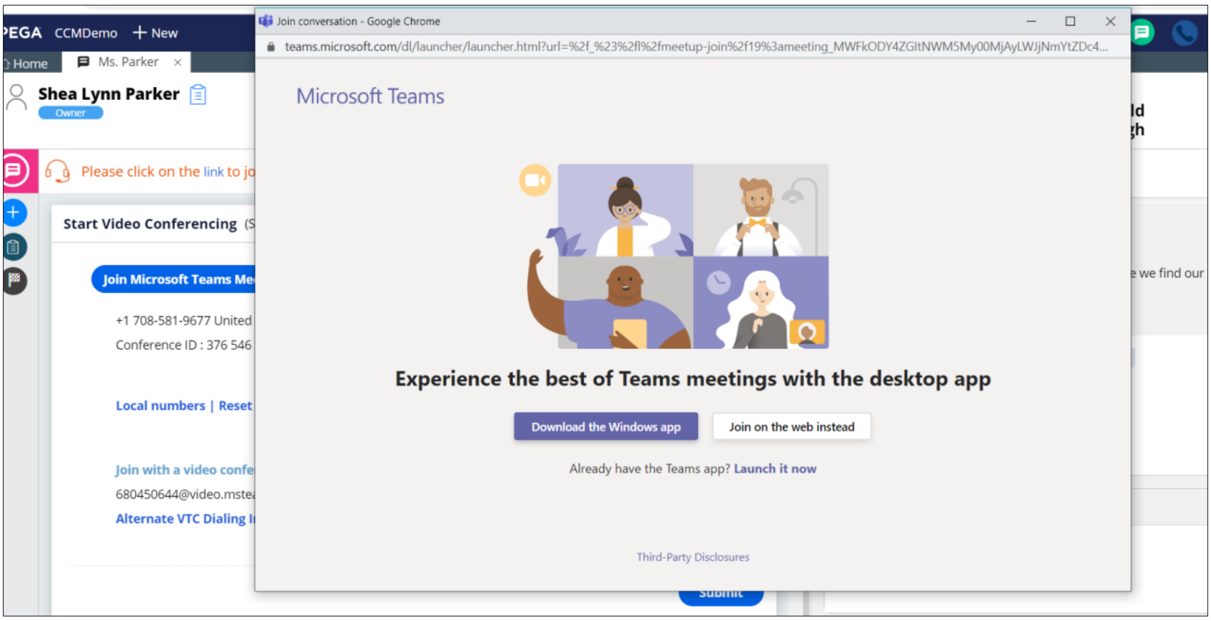
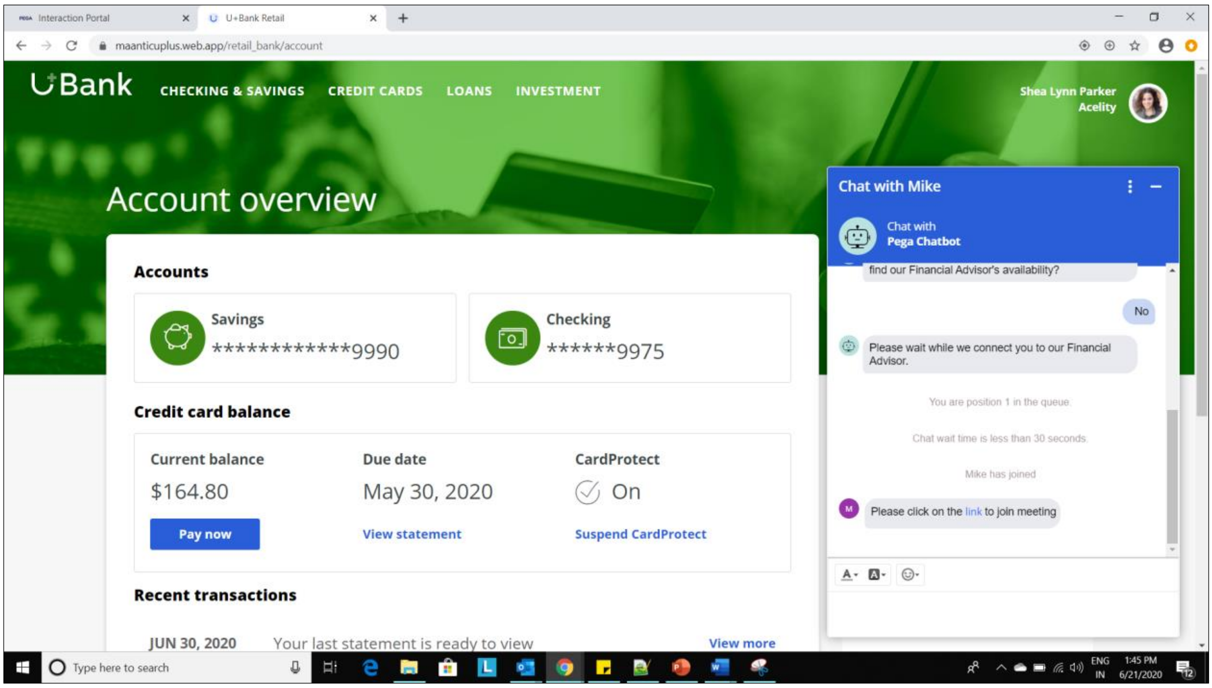


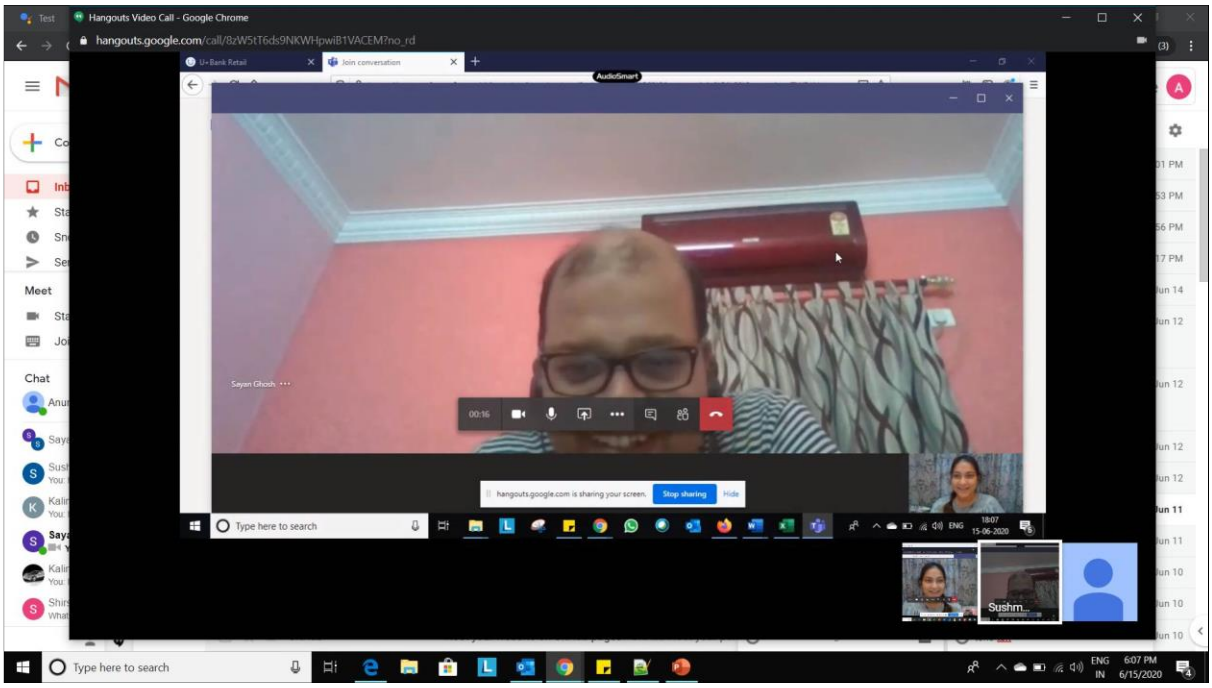
14. The Financial Advisor enters his name and clicks on Join Now. To join as an organizer, you need to have an account with Microsoft Azure. If you have an account, you can join with the same credentials. Else you will have to join as a guest.

15. The customer Shea Parker on the other hand also receives a link in the chat window to join the join.



16. The customer clicks on the link to join the meeting. Customer also uses the option Join From Web instead.

17. After the customer and the Financial Advisor joins MS teams, the screen looks somewhat like the below.



Scenario 3: Rapid Response Through Voice Command- Integration with Google Assistant:

Log in to the below URL https://console.actions.google.com/ with credentials : maantichackathon@gmail.com/install@123

1. You will be able to see to see the list of projects configured. You can select one and test.
2. Go to the TEST Tab.
3. You can switch the project from the top right-hand corner.
4. Use Case 1-Last Transaction; Fetch the recent transaction of the customer.

   The customer dialogs are highlighted in YELLOW.

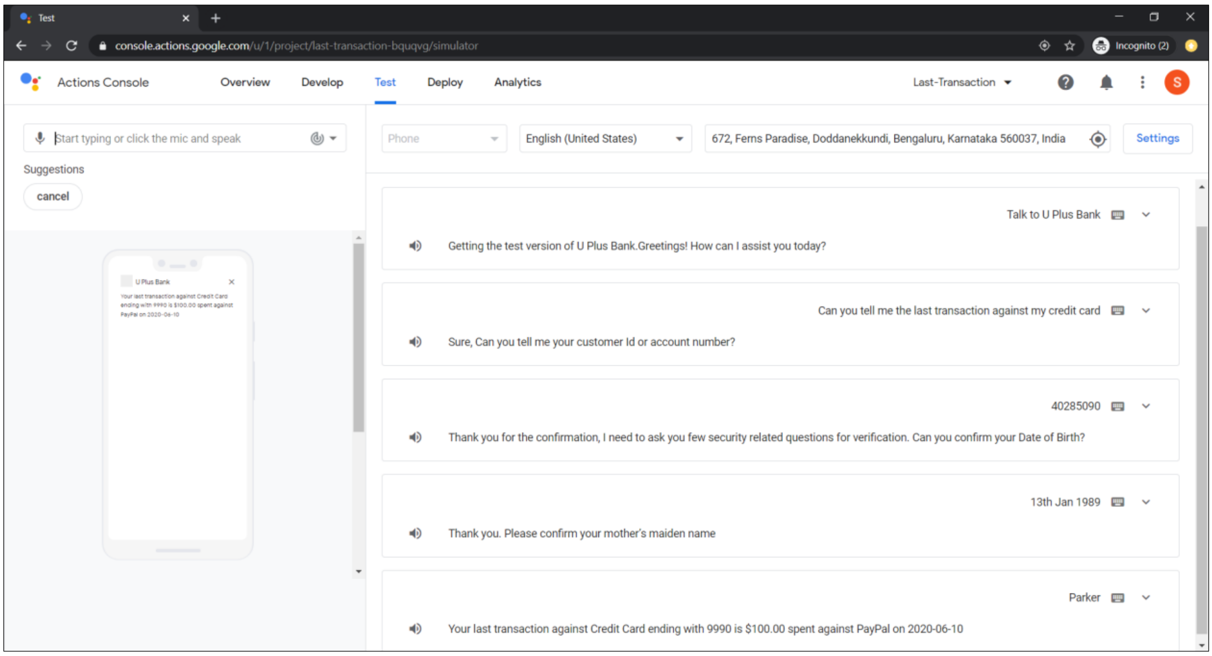
   - Customer: Can you tell me the last transaction against my credit card
   - Bot: Sure, can you tell me your customer Id or account no?
   - Customer: My account number is 40285090

Test Scripts

- Bot: Thank you for the information, I need to ask you few security related questions for verification. Can you confirm your DOB?
- Customer: 13th Jan 1989
- Bot: Thank you. Please confirm your mother's maiden name
- Customer: Mother's maiden name is Parker
- Bot: Thank you. Your last transaction against Credit Card no: XXXXXXXXXXXXXXXX is – read out the transaction details, example: Amount <amount> spent against <merchant name> on <date>

For demo purpose, for fetching the latest transaction details, we have created a data table in PEGA and have hardcoded few records.

Screen Shot for Use Case 1-



5. Use Case 2-Statement Copy; Send last month's statement over email.

The customer dialogs are highlighted in YELLOW.

- Customer: Can you send me my last month's statement copy in my email?
- Bot: Sure, can you tell me your customer Id or account no?
- Customer: My customer Id is 40285090
- Bot: Thank you, I see you have one deposit & one credit account liked to this customer id. Please confirm which account you need the statement for

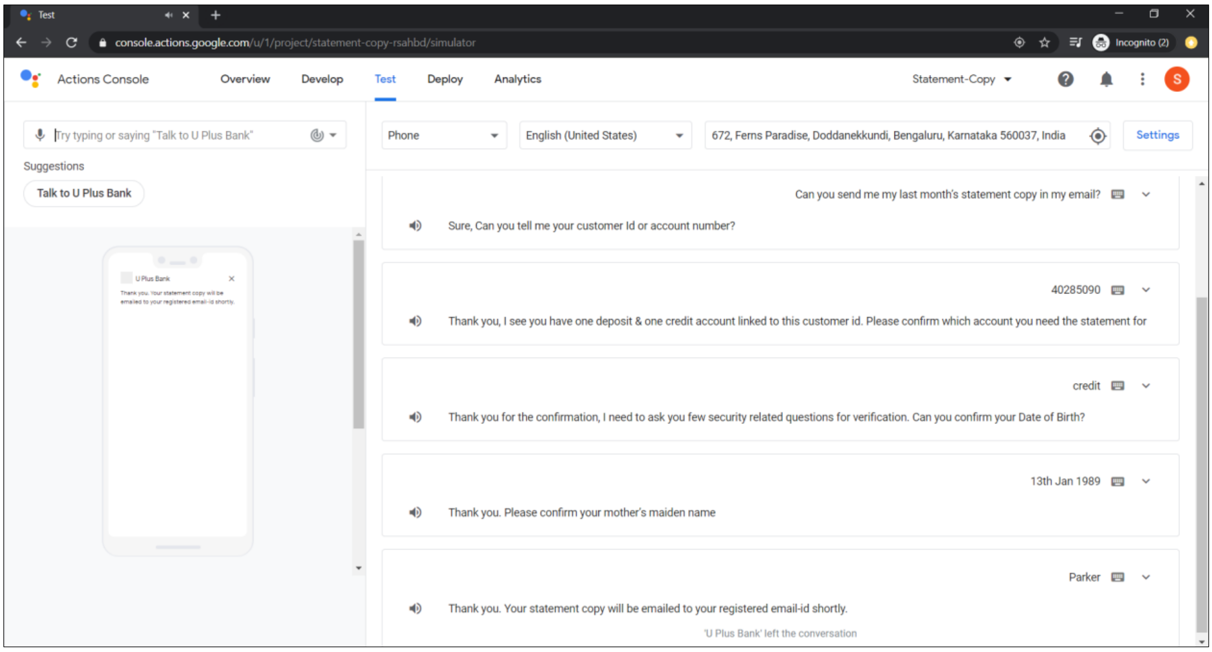
Test Scripts

- Customer: Credit
- Bot: Thank you for the confirmation, I need to ask you few security related questions for verification. Can you confirm your DOB?
- Customer: 13th Jan 1989
- Bot: Thank you. Please confirm your mother's maiden name
- Customer: Mother's maiden name is Parker
- Bot: Thank you. Your statement copy will be emailed to your registered email-id shortly.

For demo purpose, for sending the statement over email, we have created a data table in PEGA and have hardcoded few transaction records. Also, we have created a Dynamic System Settings for the recipient of the email. You can modify this rule and put your email id for testing purpose.

Rule Name: SenderEmail

Screen Shot for Use Case 2-



Statement has been sent to the registered email id-

Test Scripts