

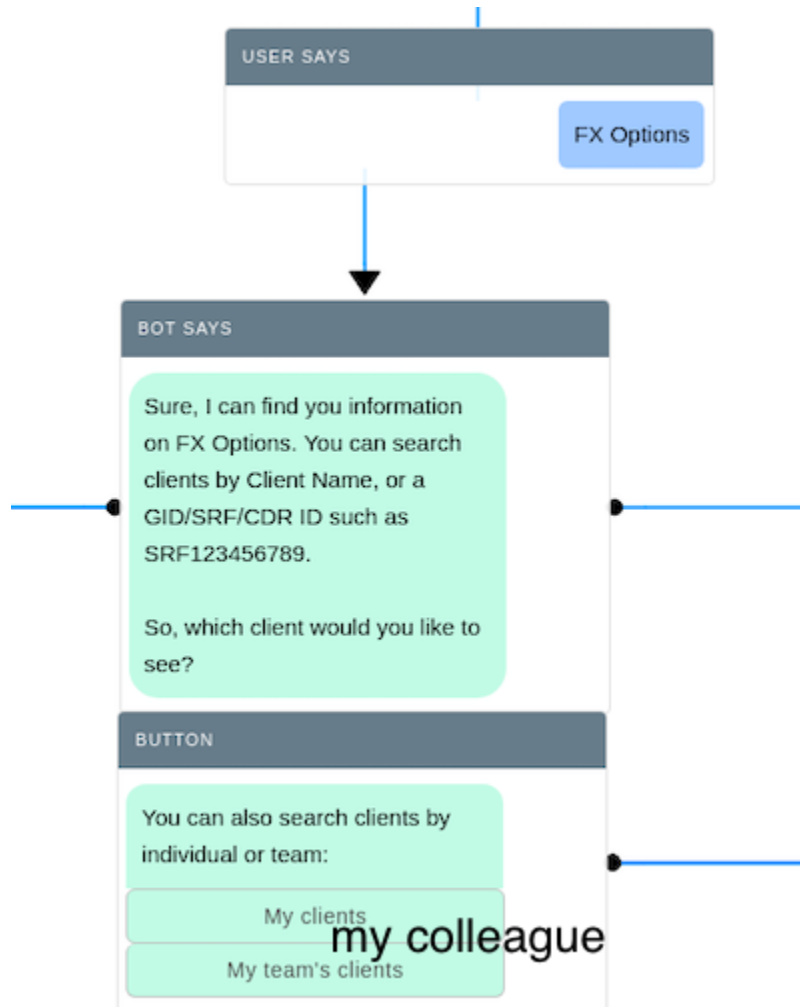
intent expiring trades - update after CDX changed

Design & Requirements

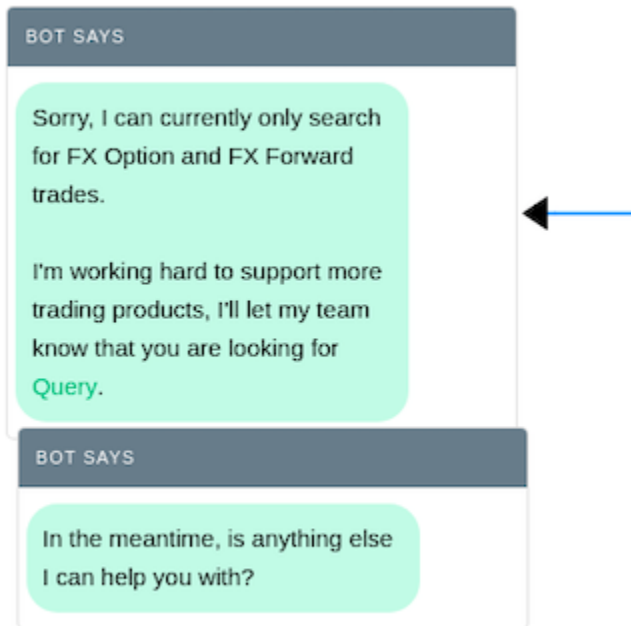
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8 # in CDX, we need to include below buttons -> return all clients
9 - my clients - search expiring trades of any clients that are covered by the user
10 - colleague's clients (this button currently absent in CDX, it needs to be included) not
    added this button until CDX is updated. it will require separate JIRA.
11 - my team's clients - search expiring trades of any clients that are covered by the user or by
    the team (Desk Entitlement)
12
13
14
15 # a specific client
16 "search for jujuAI under James Bond"
17 > return treat it as a general client search that the user is entitled.
18 "search for jujuAI under my team"
19 > return treat it as a general client search that the user is entitled.
20 "search for jujuAI under me/myself"
21 > return treat it as a general client search that the user is entitled.
22
23
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25
```

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23
24 a brief summary:
25 if user click any of these button, or enter:
26 - my clients
27 - (hold it for now - need CDX) colleague's clients
28 - my team's clients
29 based on the current design, the bot will return ALL clients covered by the type
30
31 if a client id or client name detected, bot will return a general search for that client id /
    client name
32
33 so that there are 3 cases in search_target:
34 search_target ==
35 - my clients
36 - (hold it for now - need CDX) --> "which colleague?" name of the colleague
37 - my team's clients
38
39 in its own entity/slot:
40 - a client id or a client name
41 make it optional:
42 > with an initial value
43 > or we don't even need to have initial value for optional slot. we just need to have a
    validation method, and that's it. Whenever it is identified, we keep it in the slot; if not,
    we do nothing
44
45 and based on a client is identified or not, we can do it on either ALL or SPECIFIC client
46
47
48
```

1 ask users for search_target: my clients; my colleague's clients; my team's clients;
return ALL clients covered by me; colleague; team



2 ask for valid product_name when user failed the bot



~~3 ask for teammate's name~~

~~Once users selected the "my colleague", bot would ask:~~

~~"Which colleague do you wanna search for? You can ask me:~~

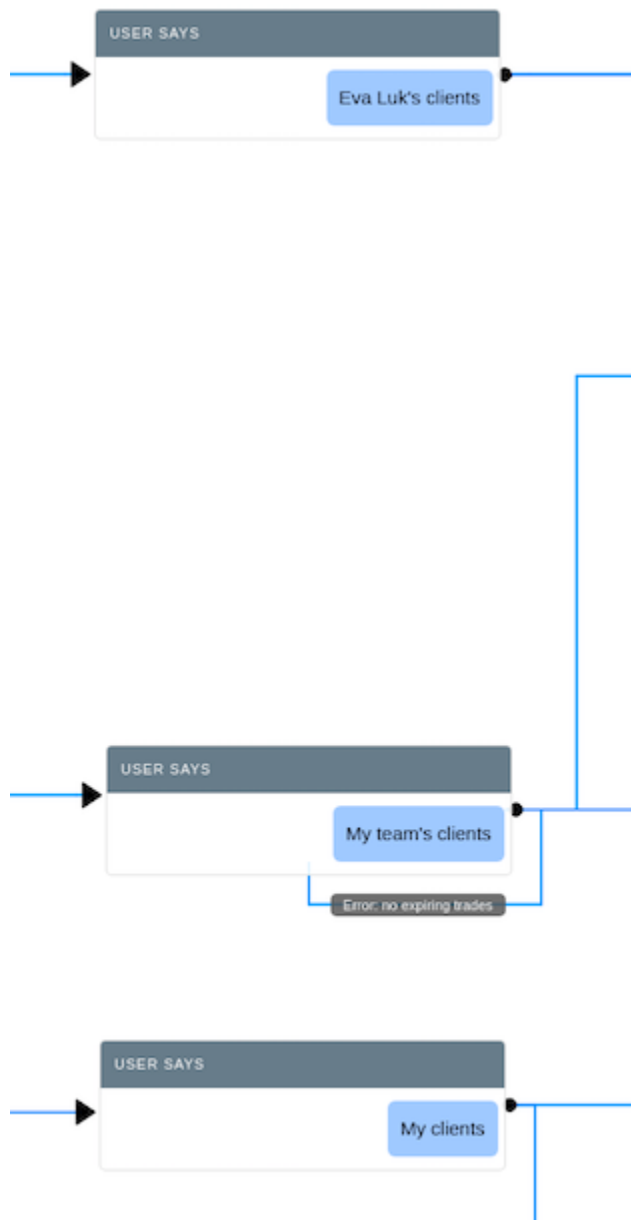
- ~~● Blackjack under James Bond~~
- ~~● All clients under James Bond"~~

4 max failure: 3 times

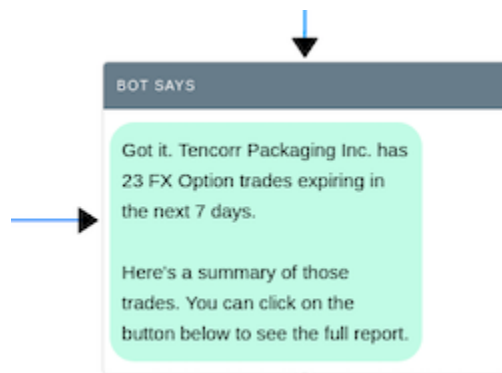
- Ask for continue or not

When users don't provide right product name
It is one of unhappy paths

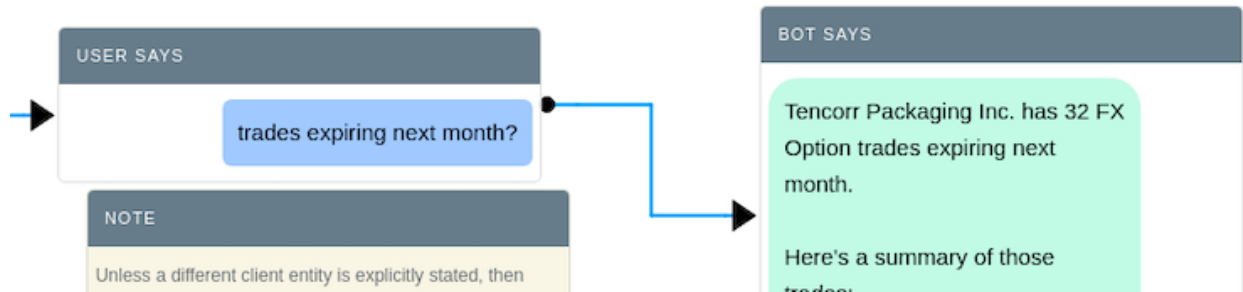
5 all clients under me / colleague / team



6 a specific client id or client name



7 Carry on some entities/slots for a new search



Under Mike:

- Client validation
- Time validation
- Intent carry-on

two-stage fallback

- Research
 - Code
-
- Test intent switch
 - Test trigger previous intent without explicitly ask for it, i.e. “how about in 2019”, trigger revenue intent automatically

To note: human_name in revenue intent

To note: intent switch

To note: trigger previous intent without explicitly ask for it