

intent expiring trades - update after CDX changed

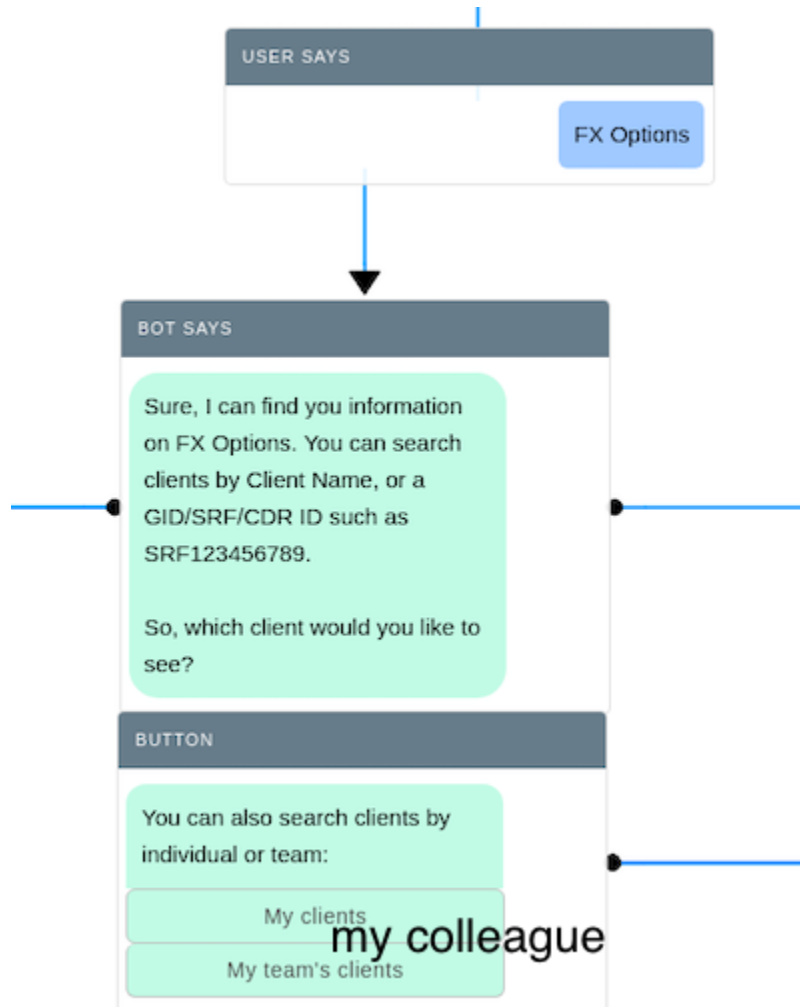
## Design & Requirements

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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
24
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```

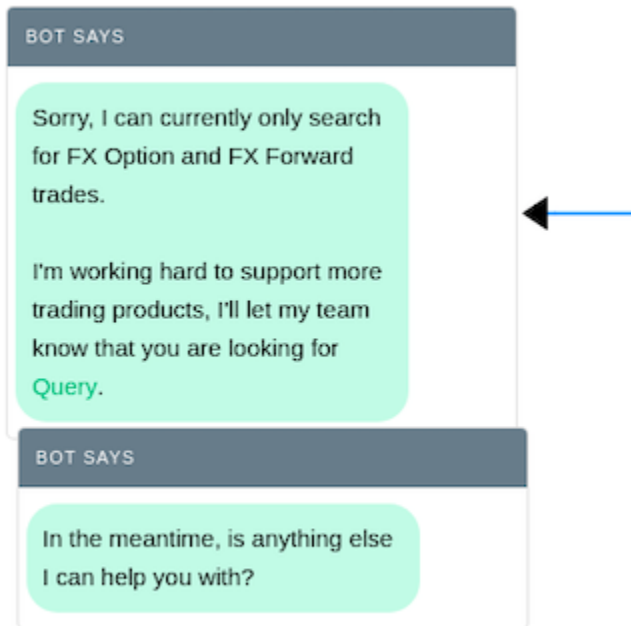
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log 0823-bt x log 0726-0730 x log 0702-0723 x frequently used commands.txt x log 0621-0630 x logs 0531-0618.txt x logs 0518-0528.txt x pip install r
24 a brief summary:
25 if user click any of these button, or enter:
26 - my clients
27 - (hold it for 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 search_target actually is search type or category, can we standardize the value of
    search_target?
39 it could be:
40 - myself
41 - colleague
42 - team
43
44 in its own entity/slot:
45 - a client id or a client name
46 make it optional:
47 > with an initial value
48 > 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
49 and based on a client is identified or not, we can do it on either ALL or SPECIFIC client
50
```

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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~~

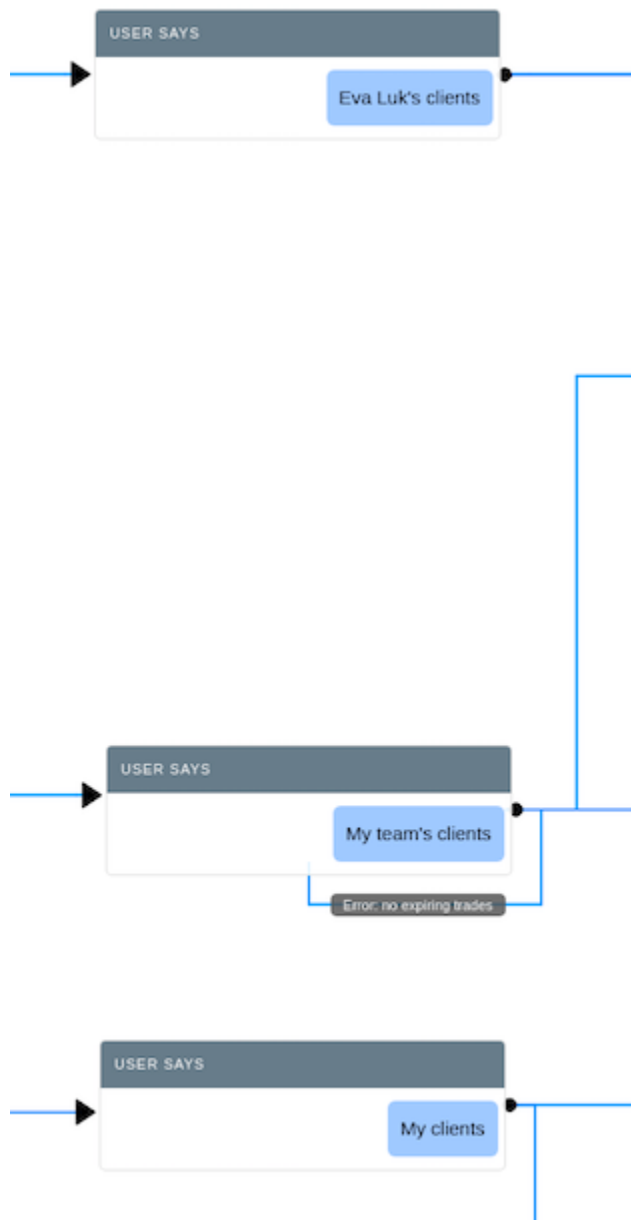
~~Once users selected the "my colleague", bot would ask:  
"Which colleague do you wanna search for? You can ask me:  
• Blackjack under James Bond  
• All clients under James Bond"~~

4 max failure: 3 times

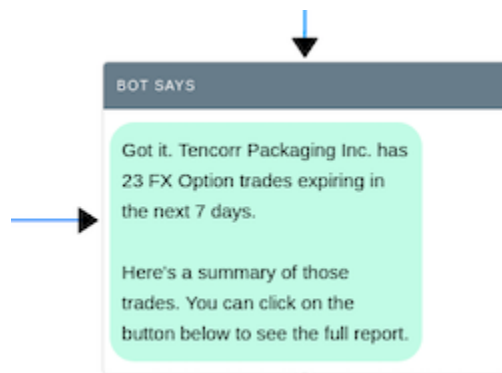
- Ask for continue or not

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

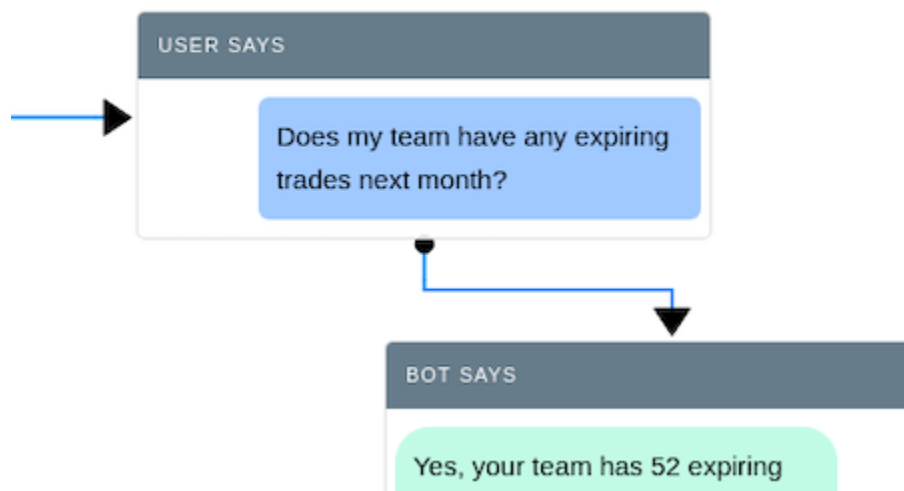
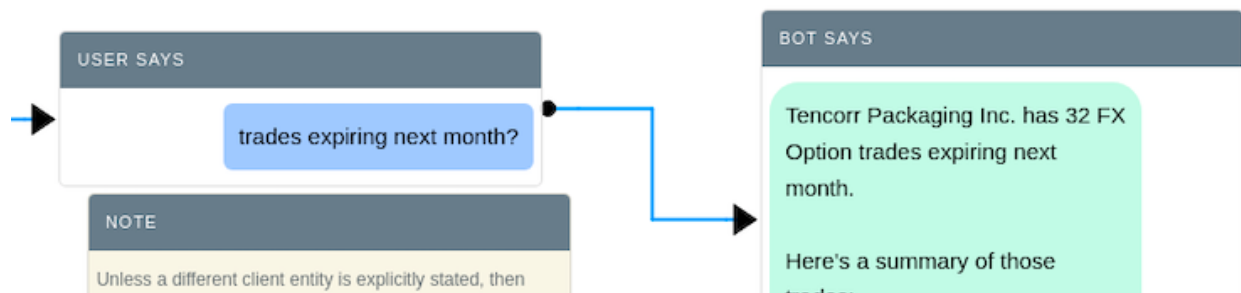
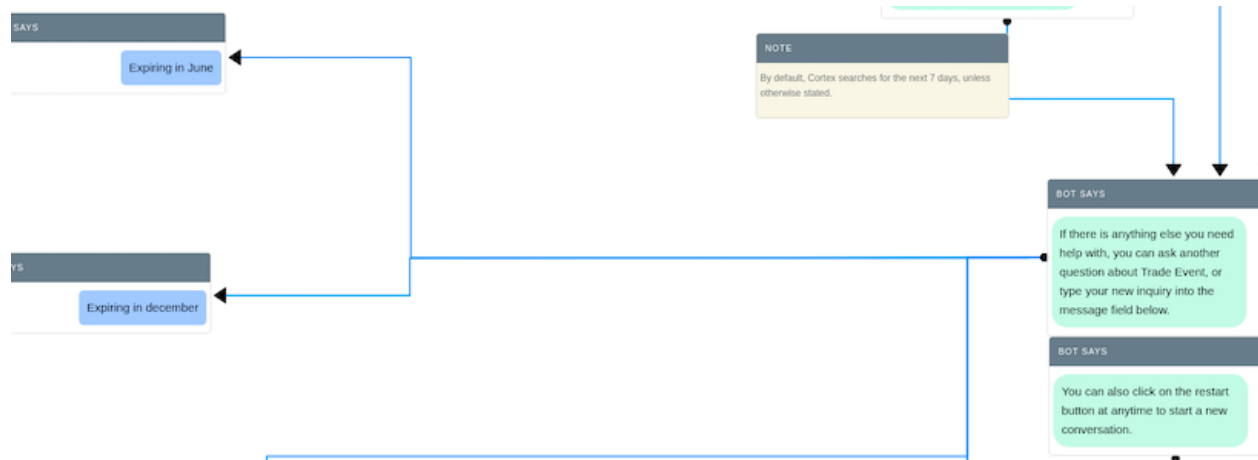
5 all clients under me / colleague / team



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