Scenario-1: Content only belongs to Adjustment Request type

Email content:
Date:05-Mar-2025
To: Commerical Bank
ATTN: Prasanth V
Fax: 877-123-1234
Re: ABCD-ABC LLC $171.3MM 13-4-2022, TERM LOAN

Description: Facility Lender Share Adjustment

BORROWER: ABCD LLC
DEAL NAME: ABCD-ABC LLC $171.3MM 13-4-2022

Effective 04-Feb-2025, the Lender Shares of facility TERM LOAN have been adjusted. Your share of the commitment was USD 5,000,000.20. It has been increased to USD 5,020,000.20.

For: Commerical Bank
Reference: ABCD-ABC LLC $171.3MM 13-4-2022
If you have any qeuestions, please call the undersigned.

********************************COMMENT**

Bank Name: Citizens Bank NAME
ABA # 015324534
Account #: 0024444444
Account Name: HGJKI Account
Ref: gdsfgdsf-Atlantic LLC

****

Regards,

ABCD RTYUI
Telephone #:
Fax #:

Model output:
  Confidence score: 1.0
  Related Topic: Adjustment

Sentiment

Neutral (0.0)

Entities

"Account #" = #Account_number

"05-Mar-2025" = #Date

"04-Feb-2025" = #Date

"13-4-2022" = #Date

"Commerical Bank" = #Organization

"TERM LOAN" = #Organization

"Facility Lender Share Adjustment" =
#Organization

"ABCD LLC" = #Organization

"USD" = #Organization

"Citizens Bank NAME" = #Organization

Topics

Adjustment (1.0)

Test routing conditions

"Commerical Bank" = #Organization

"TERM LOAN" = #Organization

"Facility Lender Share Adjustment" = #Organization

"ABCD LLC" = #Organization

"USD" = #Organization

"Citizens Bank NAME" = #Organization

"HGJKI Account" = #Organization

"gdsfgdsf-Atlantic LLC" = #Organization

"ABCD RTYUI" = #Organization

"Prasanth V" = #Person

Outcomes

Type	Outcome
Create case	Adjustment
Close email triage case	

Back   Close

Confirmation email:

Pega <no_reply@pega.com>   6:47 PM (31 minutes ago)
to me ▾

Hi,
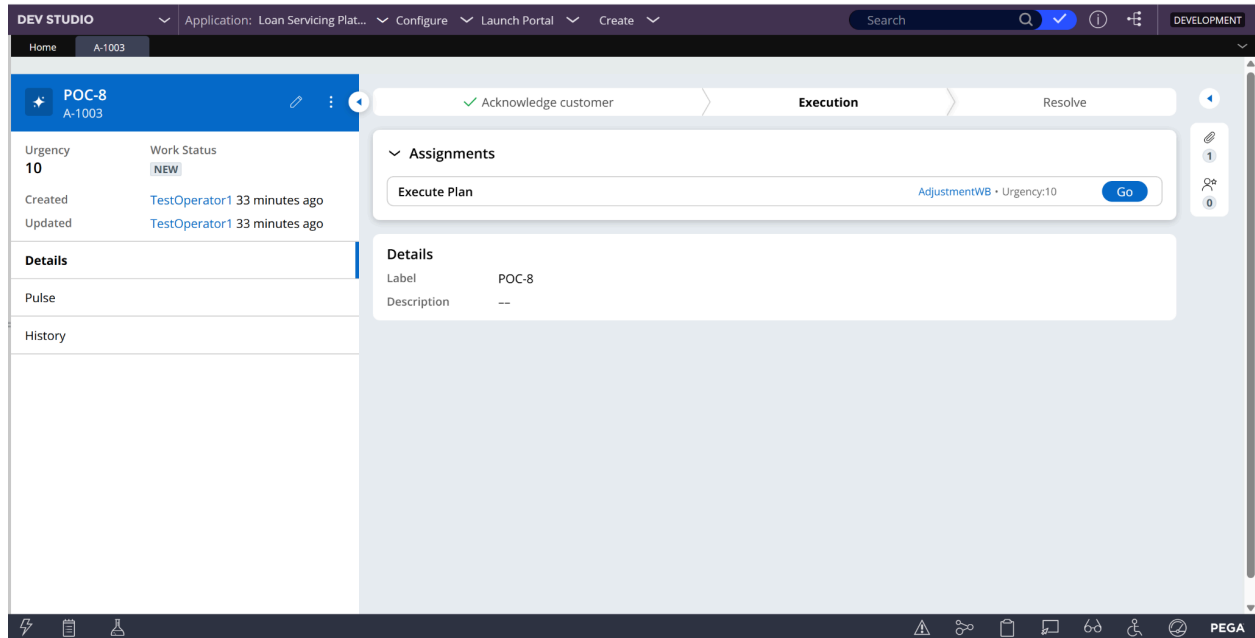
Thank you for the email. Case ID A-1003 has been created for Adjustment request type

↩ Reply   → Forward   ☺

Workflow in Pega: Routed to AdjustmentWB workbasket

Scenario-2: Content only belongs to Money Movement - Inbound Request type

Email content:
Date:05-Mar-2025
To: Commerical Bank
ATTN: Prasanth V
Fax: 877-123-1234
Re: ABCD-ABC LLC $171.3MM 13-4-2022, TERM LOAN

BORROWER: ABCD LLC
DEAL NAME: ABCD-ABC LLC $171.3MM 13-4-2022

For: Commerical Bank
Reference: ABCD-ABC LLC $171.3MM 13-4-2022
If you have any qeuestions, please call the undersigned.

********************************COMMENT**
PLEASE FUND YOUR SHARE OF $20,000.00

Bank Name: Citizens Bank NAME

ABA # 015324534
Account #: 0024444444
Account Name: HGJKI Account
Ref: gdsfgdsf-Atlantic LLC

****

Regards,

ABCD RTYUI
Telephone #:
Fax #:

Model output:

Test routing conditions

Telephone #:
Fax #:

Sentiment
Neutral (0.0)

Topics
MM Inbound (1.0)

Entities

"Account #" = #Account_number

"05-Mar-2025" = #Date

"13-4-2022" = #Date

"Commerical Bank" = #Organization

"TERM LOAN" = #Organization

"ABCD LLC" = #Organization

"Citizens Bank NAME" = #Organization

"HGJKI Account" = #Organization

"gdsfgdsf-Atlantic LLC" = #Organization

"ABCD RTYUI" = #Organization

Back   Close

Test routing conditions ✕

"05-Mar-2025" = #Date

"13-4-2022" = #Date

"Commerical Bank" = #Organization

"TERM LOAN" = #Organization

"ABCD LLC" = #Organization

"Citizens Bank NAME" = #Organization

"HGJKI Account" = #Organization

"gdsfgdsf-Atlantic LLC" = #Organization

"ABCD RTYUI" = #Organization

"Prasanth V" = #Person

Outcomes

Type	Outcome
Create case	MM Inbound
Close email triage case	

Back   Close

Confirmation Email:

Pega <no_reply@pega.com>   7:36 PM (0 minutes ago) ☆ ☺ ↩ ⋮   +
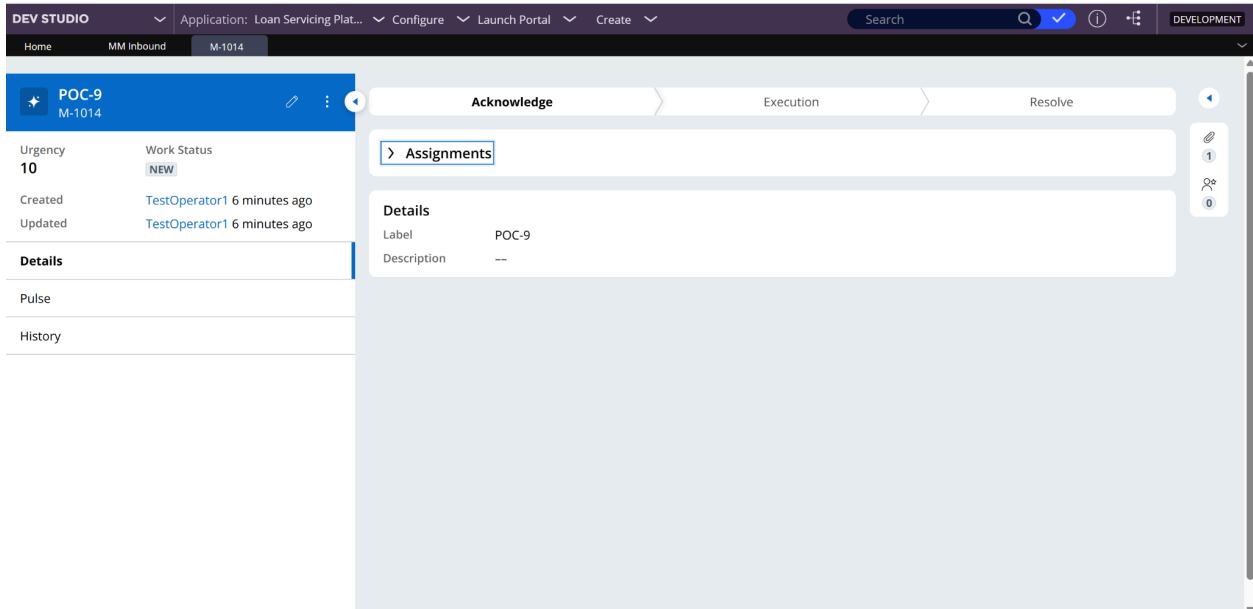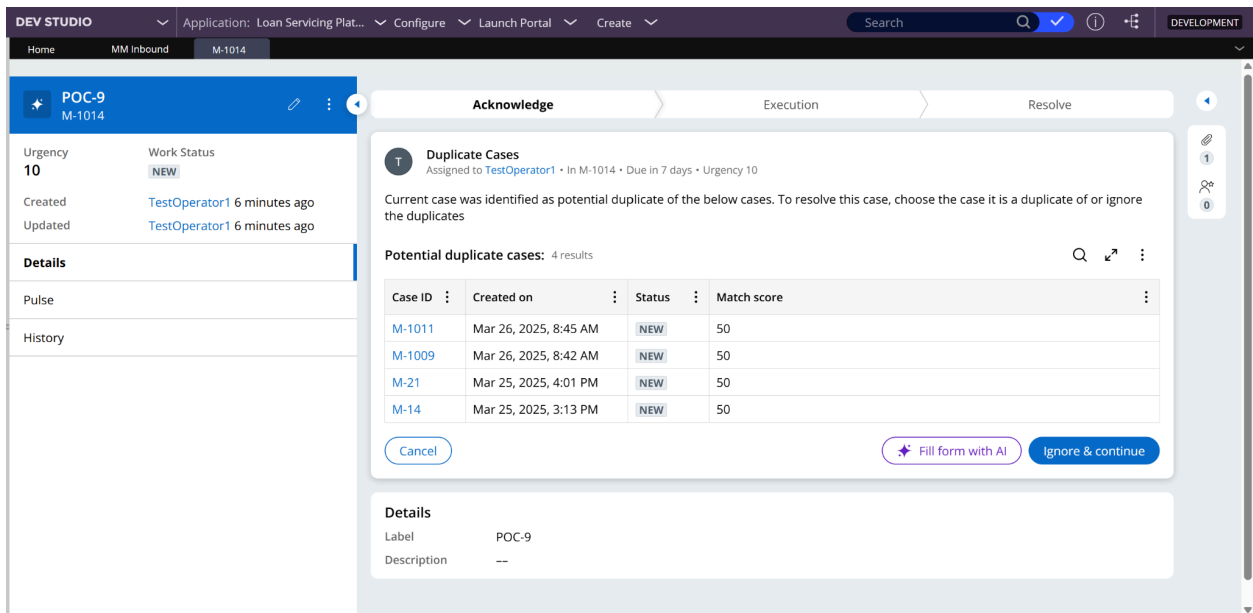to me ▾

Hi,

Thank you for the email. Case ID M-1014 has been generated for this Money Movement-Inbound request type.

↩ Reply   → Forward   ☺

Workflow in Pega:

Duplicate case detection:

Scenario-3: Content belongs to both Money Movement - Inbound and Adjustment Request types

Email content:
have been adjusted
PLEASE FUND YOUR SHARE

Model output:

Test routing conditions ✕

Your test email was evaluated as below.

> **Test**
> Test (abc@gmail.com)
> to: testservicerequests@gmail.com
>
> ---
>
> have been adjusted
> PLEASE FUND YOUR SHARE

Sentiment
Neutral (0.0)

Entities
 No items

Topics

MM Inbound (1.0)

Adjustment (1.0)

Outcomes

Type	Outcome
Create case	MM Inbound
Create case	Adjustment
Close email triage case	

[Back]   [**Close**]

Confirmation Email:
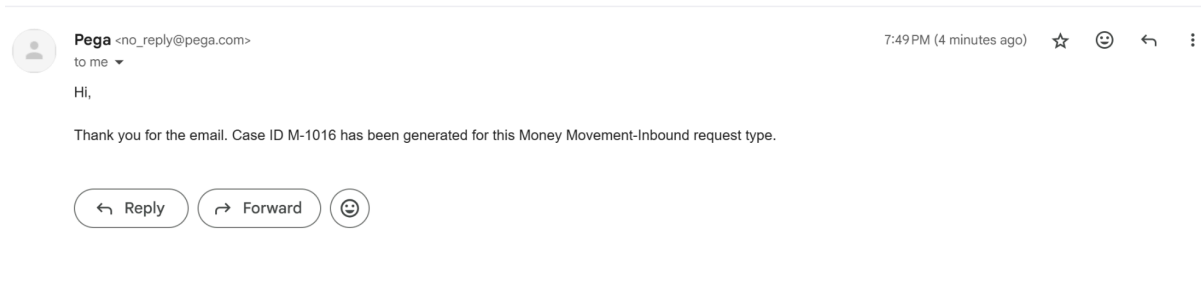
Pega <no_reply@pega.com>   7:50 PM (0 minutes ago) ☆ 🙂 ↩ ⋮
to me ▾

Hi,

Thank you for the email. Case ID A-1004 has been created for Adjustment request type
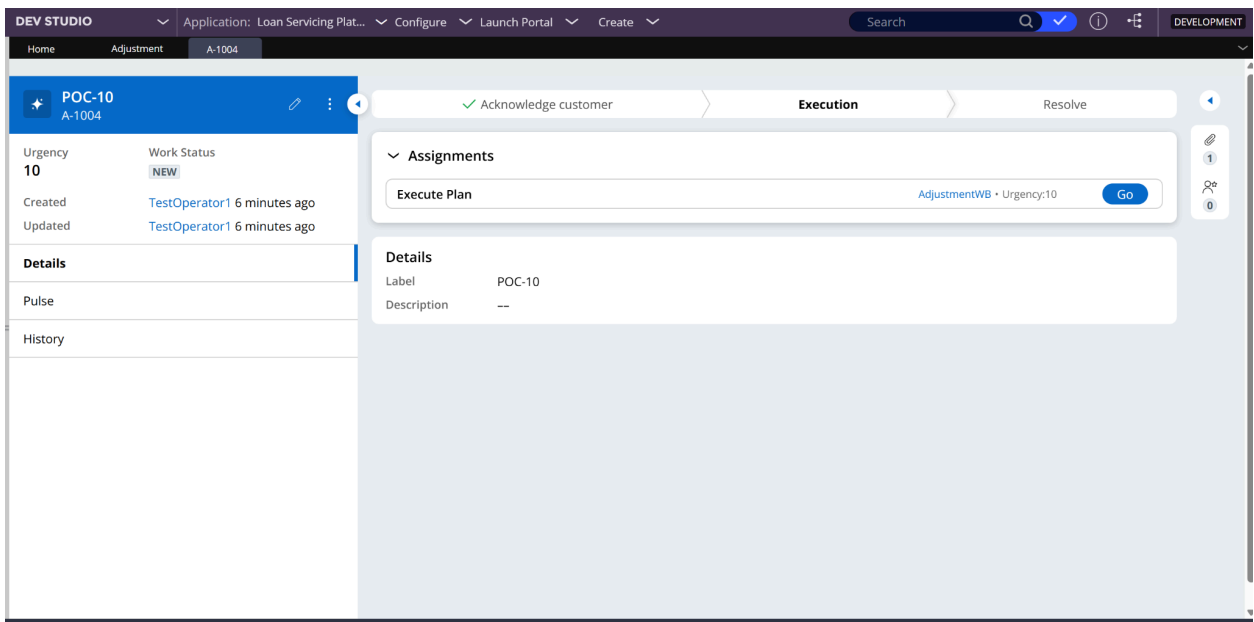
↩ Reply   → Forward   🙂

Hi,

Thank you for the email. Case ID M-1016 has been generated for this Money Movement-Inbound request type.

↩ Reply   → Forward   ☺

Both cases are created; A-1004 and M-1016.

Workflow in Pega:

Application: Loan Servicing Plat... ∨ Configure ∨ Launch Portal ∨ Create ∨

Search

DEVELOPMENT

Home   MM Inbound   M-1016

POC-10
M-1016

Urgency	Work Status
10	NEW
Created	TestOperator1 7 minutes ago
Updated	TestOperator1 7 minutes ago

Details

Pulse

History

Acknowledge 〉 Execution 〉 Resolve

∨ Assignments

Duplicate Cases	TestOperator1 • Due in 7 days • Urgency:10	Go

Details

Label	POC-10
Description	--