Solve a challenge with the help of the UiPath community

Duration: 30 min

Lesson overview

In this lesson, you'll elevate your skills with an additional hands-on challenge. You'll submit your project to the UiPath forum, where you can seek

guidance, discuss issues, and

collaborate with an expert mentor —

all while independently tackling the

real-world business case.

A local bank is looking at automating some of their incoming documents to improve the efficiency of the

process. The documents lined up for the automation include **Credit Card Applications** and **Bank**

Account Opening forms.

The PDF document sent to the respective department includes either the credit card application form

or the account opening form. Usually, the account opening form is followed by a Know Your Customer

(KYC) form. The order in which these documents are attached in the PDF file may differ.

You need to extract the fields from the documents below and generate a Document Understanding

workflow to process the documents by generating the extracted results in Excel files.

Credit card application

All credit card applications follow a similar structure. It is the only document that you have in the PDF file. You need to extract the following fields from the **credit card application**:

Field name	Notes	Tips	Mandatory field
Card type	Domestic or international	Use checkbox detection	Yes
Card variant	Platinum or Visa	Use checkbox detection	Yes
First name			Yes
Middle name			Yes
Last name			Yes
Name on card			Yes
Mother's maiden name			
Age			Yes

Gender		Use checkbox detection	Yes
Date of birth			
Nationality			Yes
Vehicle owned		Use checkbox detection	
Number of dependants		Use checkbox detection	
Married		Use checkbox detection	
Address	Full address, state, and city separately		
Employment status	Salaried/self-employed/retired	Use checkbox detection	
Name of the Company			

Designation			
Office address			
Credit cards held	Extract as a table and include all three columns (Card No., Issued Bank, and Credit Limit)	Tabular	

Bank account opening process documents

The Account opening form is followed by a Know Your Customer (KYC) form in the same PDF file. The extraction should be done for both document types separately.

You need to extract the following fields from the **account opening form**:

Field name	Notes	Tips	Mandatory field
Customer type	Public/staff	Use checkbox detection	Yes

Salutation	Mr./Mrs./Ms./Other		
Full name	First, middle, and last name together		Yes
Date of birth			Yes
Gender	Male/Female	Use checkbox detection	
Nationality			
Marital status	Married/Unmarried/Other	Use checkbox detection	
Overseas address			
City			
Country			
Passport details	Extract passport details as a table that includes (passport No, Issue Date,		

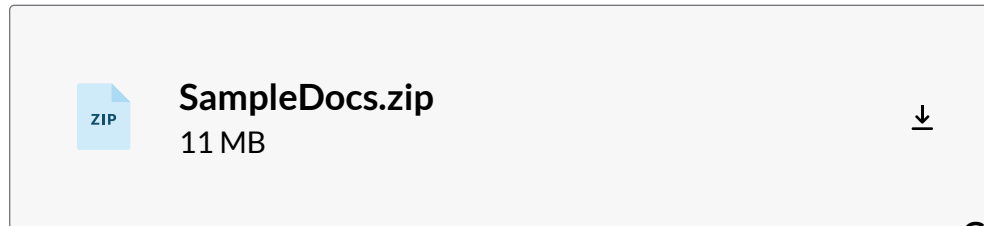|			
	Place of Issue, Nationality, and Date of Expiry)		
Applicant signature		Use signature detection to check whether the document is signed by the applicant	Yes

You need to extract the following fields from the **KYC form**:

Field name	Notes	Tips	Mandatory field
Application type	New/change request	Use checkbox detection	Yes
Name of the applicant			Yes
Gender	Male/Female	Use checkbox detection	

Marital status	Single/Married	Use checkbox detection	
Date of birth			
Nationality	Indian/Other	Extract the Nationality text if Other is selected	
Residential status	Resident Individual/ Non-Resident/ Foreign National	Use checkbox detection	
Address for correspondence			
Applicant signature		Use signature detection to check whether the document is signed by the applicant	

Download - sample documents

ZIP	**SampleDocs.zip** 11 MB

Good luck with the challenge!

UiPath Forum

This journey is all about your growth, problem-solving prowess, and lasting retention of knowledge.

Remember, we're not handing you the solution in the course – we're presenting you with a real-world

business case as an opportunity to put your skills to the test and boost your learning reinforcement.

Here's what you need to do:

Upload the solution zip file to UiPath Forum.

Openly discuss any issues or doubts by including screenshots for clarity and receive

guidance from UiPath's Most Valuable Professional (MVP) if you encounter roadblocks in

the advanced exercise.

Expect swift feedback as the MVP reviews workflows and offers suggestions every
Wednesday of the week.

UiPath Forum
collaboration
Submit your workflow
here. Discuss hurdles,
seek suggestions, and
collaborate with fellow

learners under the
attentive guidance of
our expert.

Use the hints below to generate a Document Understanding workflow to process the documents and generate the extracted results in Excel files.

Build a Dispatcher workflow to read the documents available in a specific folder and load it into an Orchestrator Queue.

Use the Document understanding activities to build your solution to process documents. The Document Understanding workflow should take the file path from the Queue updated by the Dispatcher.

Decide which classifier supports the requirement.

Decide which extractor best suits the requirement.

Store the extracted data in Excel files. Excel file should be named in the following pattern: **<Classification Type>-<Customer Name>.xlsx**

Kudos for completing the challenge and mastering the Document Understanding Studio activity skills!

Next, read the additional learning resources and tackle the quiz.