Assignment : Customer Onboarding Form Creation Using AWS Textract or Google Cloud Vision API

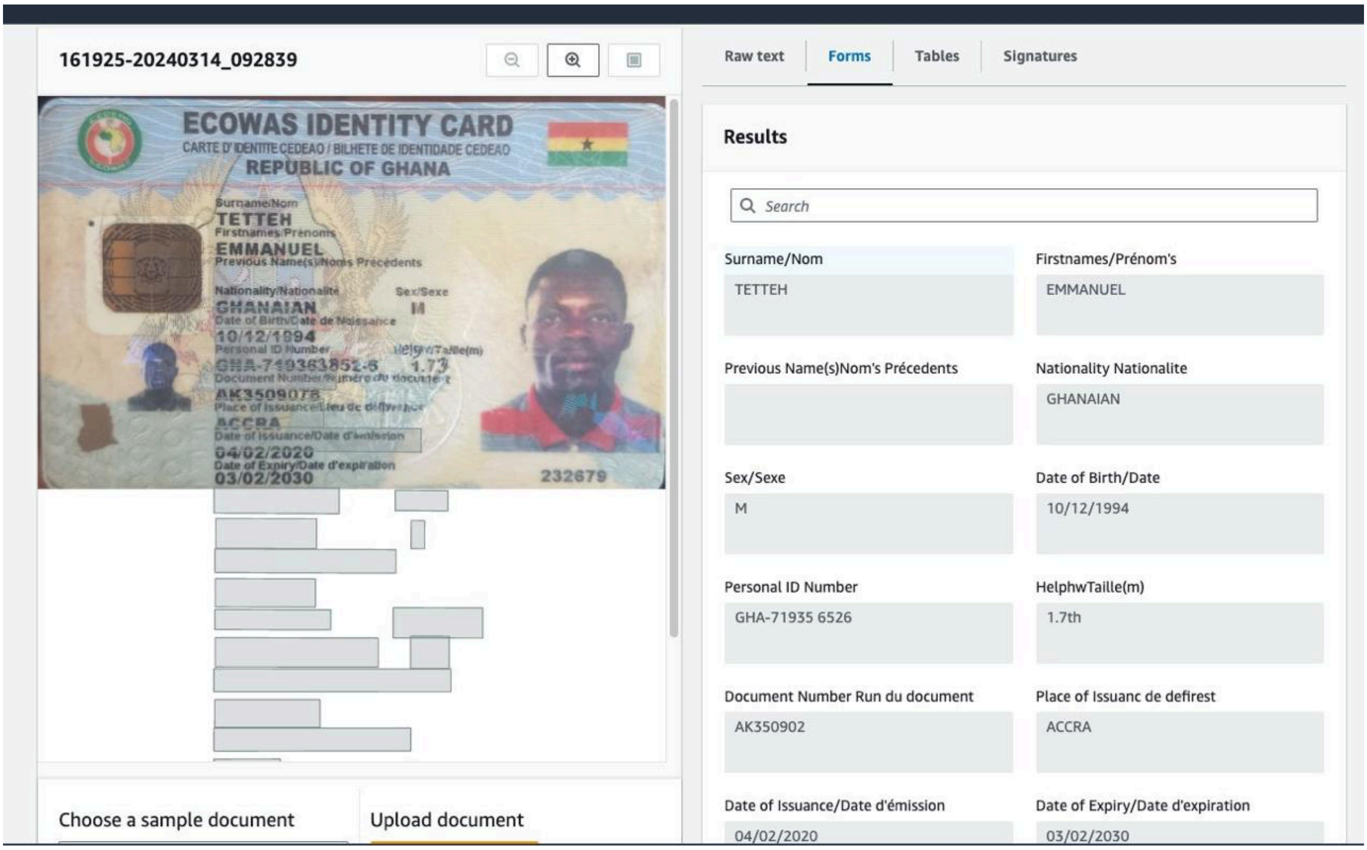
Objective:

To develop a customer onboarding form utilising AWS Textract API for extracting data from documents, with country-specific configurations and backend management through Django admin.

https://www.figma.com/file/3KTW7wNqhUsxN9bpm8nV1T/CreateCustomerByKYC?type=design&node-id=0%3A1&mode=design&t=t8gVAdWQNxXrBaoi-1

Technical Recommendations:

- Utilise AWS Textract API for document text extraction. (Recommended) https://docs.aws.amazon.com/pythonsdk/
- You can also use Google Cloud Vision API instead of AWS



Results

Search

Surname/Nom
TETTEH

Firstnames/Prénom's
EMMANUEL

Previous Name(s)Nom's Précedents

Nationality Nationalite
GHANAIAN

Sex/Sexe
M

Date of Birth/Date
10/12/1994

Personal ID Number
GHA-71935 6526

HelphwTaille(m)
1.7th

Document Number Run du document
AK350902

Place of Issuanc de defirest
ACCRA

Date of Issuance/Date d'émission
04/02/2020

Date of Expiry/Date d'expiration
03/02/2030

Scope:

- Backend Setup:
  - Create Document Sets specific to each country via Django admin backend.
- Models:
  - CountryModel:
    - Define a model for countries, including a name field.
    - Add a country field to the Django User model.
  - DocumentSetModel:
    - Define a model for document sets, specifying the document name, associated countries, presence of a backside, and OCR labels in JSON format.
  - CustomerModel:
    - Create a model for customers, including fields for surname, first name, nationality, gender, and any other relevant document-specific fields.
    - Include a createdBy field linking to the User who created the customer.
  - CustomerDocumentModel:
    - Define a model for customer documents, with fields for the customer, attached file, extracted JSON data, and creation timestamp.

Sample MODELS

```
1. CountryModel
NAME  = String

NOTE:
Add Country Field in Django User MODE as Foreign Keys

2. DocumentSetModel
Name Of Document = String
COuntry = Many2Many (CountryModel)
has_backside = Boolean
OCRLabels = Text (JsonString) # This Json is a key value pair of potentially
available data from this document.



3. CustomerModel
Surname = ChoiceField
Firstname = String
Nationality = ForeignKey (CountryModel)
Gender = ChoiceField
# Create Other fields as per document.
createdBy = ForeignKey (User)

4. CustomerDocumentModel
Customer = ForeignKey (Customer)
```

```
attached_file = FILE
extracted_json = Text (JsonString) #This Json is a key value pair of
extracted data from this document.
created_at = TIMESTAMP
```

Steps:

1. Upon user login, provide two menu options: Create Customer and List Customer.
2. Under the Create Customer menu, list accepted document types based on the country assigned to the user.
3. Allow users to choose a document type, upload front and back sides (if applicable), and trigger the API for data extraction.
4. Create a CustomerModel instance based on the extracted data.
5. Save the extracted data in JSON format within the CustomerDocumentModel and display it inline in the admin interface.
6. Conclusion:
7. By following these steps, we aim to streamline the customer onboarding process, leveraging AWS Textract for efficient data extraction and Django admin for backend management.

Key Features:

- Easy Navigation: Design the form for easy navigation, allowing users to move forward and backward effortlessly.
- Colour Scheme: Adhere to the colour scheme specified in the Figma layout for consistency and brand identity.
- Quick Loading: Optimise the form for quick loading and efficient operation.
- Error Handling: Implement form error handling and data validation to ensure accurate submission and a seamless user experience.

Timeline:

The project is expected to be completed within 2 Working Days.

Reporting:

In order to fulfil this assignment, please create a GitHub repository. Additionally, include a small sample video clip showcasing the functionality of the assignment.

Please feel free to reach us at technical@mobihivelabs.com incase you have any query regarding the assignment.