aws

Architecture Diagrams

Financial Advisor Chat Assistant

Financial Advisor Chat Assistant: Architecture Diagrams

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Financial Advisor Chat Assistant

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Financial advisors often work outside of normal business hours, when head office teams might not be available to answer questions. This architecture enables you to use AWS to create a sophisticated conversational chatbot to help financial advisors get answers to their queries 24/7.

Financial Advisor Chat Assistant Diagram
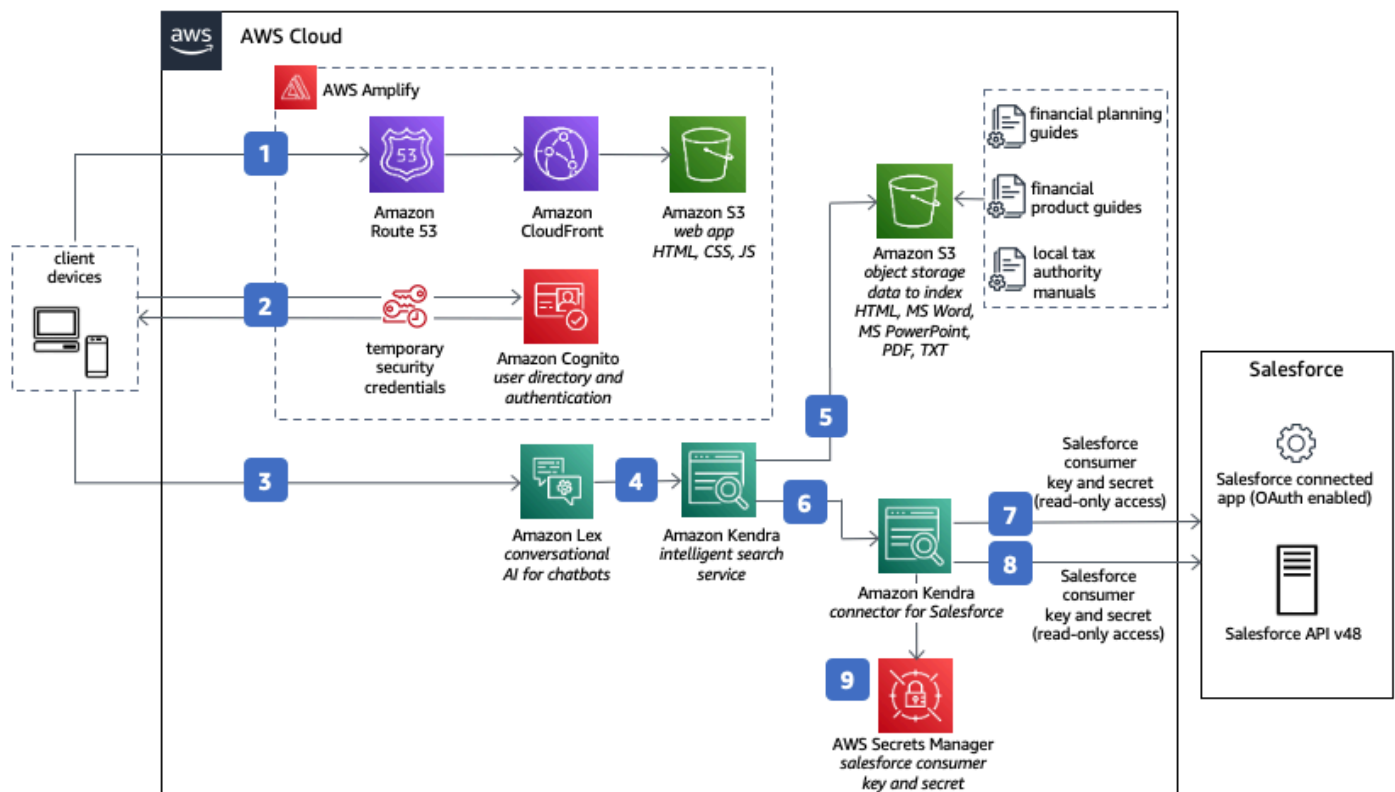
To enhance the security of this architecture, you shoulduse the following additional services: **AWS CloudTrail** to track API usage, **Amazon CloudWatch** to monitor the AWS resources, and **AWS Key Management Service** (AWS KMS) to help securely generate and manage AWS encryption keys. You should also enable secure headers in **AWS Amplify**.

1. The user's browser resolves domain names through **Amazon Route 53** to IP address for **Amazon Simple Storage Service** (Amazon S3) and **Amazon CloudFront**.
2. **Amazon Cognito** provides user authentication and access control to the chat assistant and returns temporary credentials to the user's browser or app to grant access to Amazon Lex . AWS

recommends that you enable a strong password policy in **Amazon Cognito**. **Amazon Route 53**, **CloudFront**, **Amazon S3**, and **Amazon Cognito** are managed by **Amplify**, which aids rapid application development.

3. The user's browser uses the temporary credentialsto call the **Amazon Lex** API.

4. **Amazon Lex** uses a built - in **Amazon Kendra** search intent to query **Amazon Kendra**. Access to **Amazon Kendra** is controlled by an **AWS Identity and Access Management** (IAM) role.

5. **Amazon Kendra** indexes objects in **Amazon S3** using the **Amazon Kendra Amazon S3** connector. You should enable **Amazon S3** at rest encryption.

6. **Amazon Kendra** indexes all objects in Salesforce, which are then available through the **Amazon Kendra** Salesforce connector.

7. Before connecting **Amazon Kendra** to the user's Salesforce server, you must create a Salesforce connected app with OAuth enabled.

8. **Amazon Kendra** indexes Salesforce (API version48) with the Salesforce consumer and secret key.

9. Salesforce keys are stored in **AWS Secrets Manager** and use key rotation.

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Further reading

For additional information, refer to

- AWS Architecture Icons
- AWS Architecture Center
- AWS Well-Architected

Diagram history

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Change	Description	Date
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