



Architecture Diagrams

Financial Advisor Chat Assistant



Financial Advisor Chat Assistant: Architecture Diagrams

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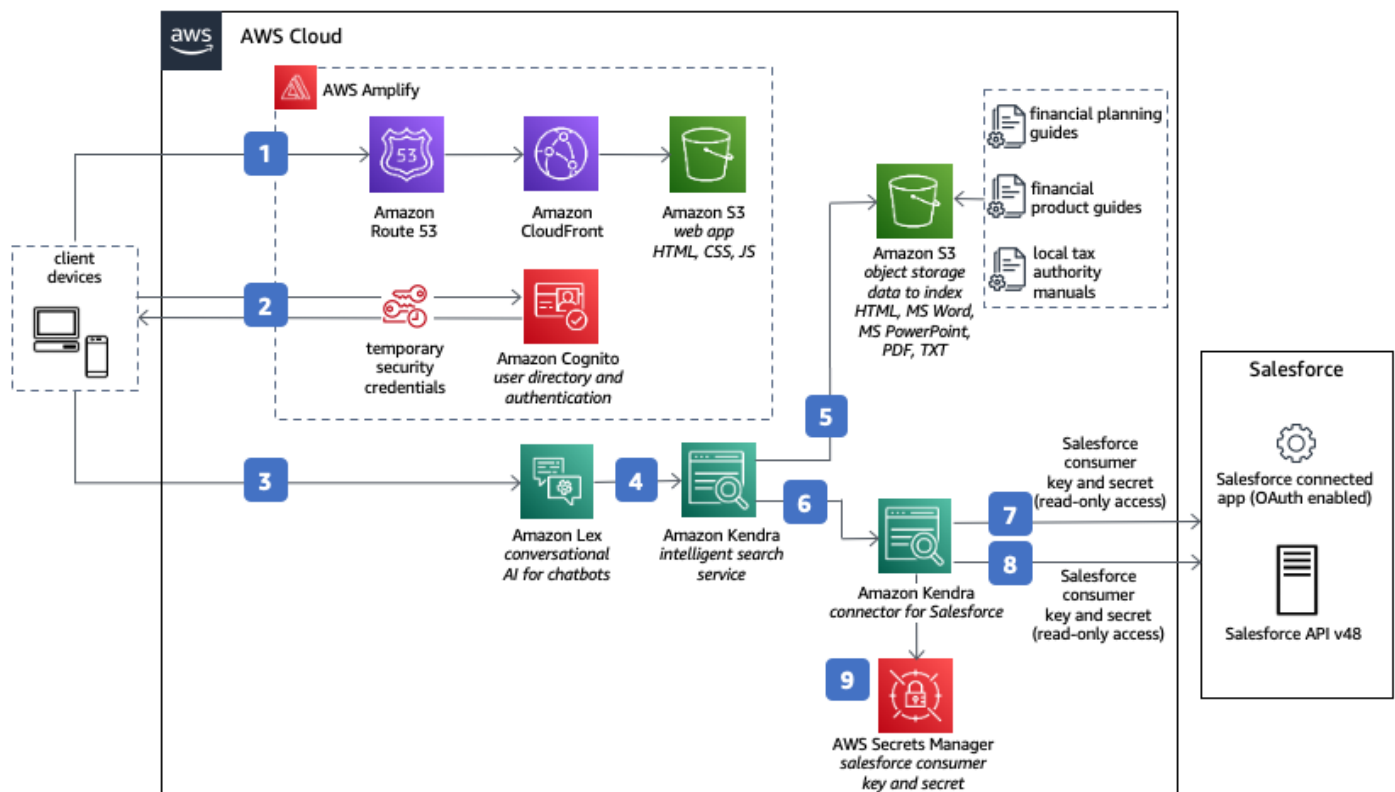
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Financial Advisor Chat Assistant

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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 should use 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 credentials to 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 version 48) with the Salesforce consumer and secret key.
9. Salesforce keys are stored in **AWS Secrets Manager** and use key rotation.

Further reading

For additional information, refer to

- [AWS Architecture Icons](#)
- [AWS Architecture Center](#)
- [AWS Well-Architected](#)

Diagram history

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Initial publication	Reference architecture diagram first published.	January 10, 2022

 Note

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