



**Reference: EoI No.: ICAI/EOI/AlinICAI dated 07.06.2024**

**Expressions of Interest (Technical Proposals) from experienced AI companies that have developed AI tools for finance, accounting, tax compliance, legal document drafting, and AI similar services.**

**Technical Proposal  
for  
Institute of Chartered Accountants of India (ICAI)**

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## 1 Introduction

**The Institute of Chartered Accountants of India (ICAI)** is a statutory body established by an Act of Parliament, namely, The Chartered Accountants Act, 1949 (Act No. XXXVIII of 1949). It is responsible for regulating and developing the profession of Chartered Accountants in the country. The Institute operates under the administrative control of the Ministry of Corporate Affairs, Government of India. As the largest professional body of Chartered Accountants in the world, the ICAI has a long-standing tradition of serving the Indian economy in the public interest. With approximately 4 lakh members and over 9 lakh students, the ICAI boasts 176 branches across India and 50 overseas chapters globally.

**Integra Micro Systems Pvt Ltd** (Referred to as 'Integra' in this document) is a leading provider of innovative hi-technology products and solutions in the Government, BFSI and Telecom space.

The company formed in 1982 and having 41 years of rich history of providing innovative technology solutions for India and abroad. The company pioneered in branchless banking solutions, Agent management solutions, Bill Payments, BHIM UPI, biometric solutions based on Aadhaar and otherwise, payment card under Financial Inclusion Initiatives. Additionally, it built digital lending platforms, ONDC ecommerce solutions, doorstep banking, Identity solutions, PMSVANidhi, and **AI based solutions**. The company extends its reach to rural and semi urban India through BC operations and PDS automations.

Since its inception in 1982, Integra has been at the forefront of innovation and has brought out several class leading products to the domestic and international markets. These included office automation products on UNIX, WAP Gateway and browser, products for billing, communications, and several utility software products in the telecom space, particularly for wireless Internet.

Our products have been accepted and utilized by several banks, financial institutions, financial inclusion agencies, government organizations and telecom operators in varied environments.

Integra has been awarded the **“Most Socially Responsible Company of the Year”** by Assocham for the year 2022 – 23. Integra's uniqueness lies in the fact that the company offers a rare combination of excellence in technology and field operations.

Integra is ISO 9001:2016, ISO 27000 certified and CMMI Level 3 accredited.

## 2 References

No.	Reference Document	Ver	Date	Document Type
1.	Eoi No.: ICAI/EOI/AlinICAI	-	07.06.2024	EOI

## 3 Background

ICAI has published Expression of Interest (EOI) to solicit proposals to develop AI tools for finance, accounting, tax compliance, legal document drafting, and AI similar services. The AI tools should be beneficial for members in industry, business, practice, students, and ICAI stakeholders in their daily work.

Integra Micro Systems Pvt. Ltd. is keen on engaging with ICAI and propose AI based Solutions as outlined in the remaining sections of the document and is confident of delivering value to ICAI through such an engagement.

## 4 Proposed AI Solutions

### 4.1 Product #1 – Integra’s Conversational AI

#### 4.1.1 Functionality

- I. On-Premise Solution: Operates without Internet connectivity.
- II. Natural Language Processing (NLP): Understands and processes user inputs.
- III. LLM / Generative AI: Enhances conversational abilities with advanced GenAI
- IV. Configurable Menus: Customizable user interaction menus.
- V. Automated Search Engine: Indexes and retrieves relevant information.
- VI. Customizable Reports and Data Insights: Generates dynamic reports and insights.
- VII. Relevance-Based Prioritization: AI re-ranks search results for relevance.
- VIII. Auto Suggestion and Correction: Suggests and corrects queries.
- IX. Context Retention: Maintains context across interactions.
- X. Semantic Search and Vectorization: Enhances search accuracy.
- XI. Chatbot Training: Trains on web pages, FAQs and documents.
- XII. User and Role-Based Access Management: Secures access.
- XIII. Admin Dashboard: Centralized administration and monitoring.
- XIV. BOT Performance Reports: Analyzes chatbot efficiency.

### **4.1.2 Benefits**

- I. Enhanced User Engagement: Provides a seamless and intuitive user experience.
- II. Improved Efficiency: Automates search and report generation, saving time and effort.
- III. Contextual Understanding: Retains context across interactions, ensuring coherent responses.
- IV. Advanced Analytics: Integrates with BI tools for in-depth data analysis.
- V. Customization: Offers configurable menus and customizable reports.
- VI. Security: Ensures secure access with user and role-based management.

### **4.1.3 Integration Capabilities**

Integra's Conversational AI can be integrated with:

- I. Any modern applications using REST APIs (Bi-directional data exchange)
- II. Business Intelligence tools like Power BI
- III. Active Directory
- IV. WhatsApp Integration
- V. Ticketing Tool System
- VI. LIVE Agent system
- VII. Any third-party APIs (REST) for legacy systems

## 4.1.4 Potential Use Cases for the ICAI

### Use Case 1: Enhanced Member Support

#### Problem Statement

Members of the institute often require quick and accurate responses to their queries related to industry standards, regulations, and best practices.

#### Proposed Solution

The Conversational AI can provide instant and relevant answers to member queries by leveraging its advanced NLP capabilities and AI-based re-ranking algorithms. It can retain context and offer auto-suggestions from FAQs, improving the overall member support experience.

### Use Case 2: Automated Reporting

#### Problem Statement

Generating detailed reports and insights from large datasets can be time-consuming and prone to errors.

#### Proposed Solution

The Conversational AI can automate the generation of customizable reports and data insights on the fly using simple English language query, integrating seamlessly with BI tools like Power BI. This enhances accuracy and efficiency in report generation.



## 4.2 Product #2 - Integra's Help Desk BOT

### 4.2.1 Functionality

- I. Error Assistance: Helps users with errors or queries in day-to-day operations and workflows.
- II. Knowledge Base Training: Trained on user guides, FAQs and reference documents with error messages and solutions.
- III. Chatbot Interface: Allows users to enter error messages. It also facilitates on the fly capturing or uploading error screenshots.
- IV. Solution Response: Provides corresponding solutions for errors.
- V. Generative AI Capability: Summarizes and explains error solutions (based on trained data) in a user-friendly manner.
- VI. Live Agent Connection (In case User needs additional assistance) : Facilitates connection to a live agent with chat history access.

### 4.2.2 Benefits

- I. Quick Error Resolution: Provides instant solutions to user errors, minimizing downtime.
- II. Enhanced User Experience: Uses Generative AI to offer user-friendly and detailed explanations.
- III. Seamless Escalation: Connects users to live agents if further assistance is needed, ensuring continuity with chat history access.
- IV. Comprehensive Knowledge Base: Continuously trained on updated FAQs, user guides and reference documents.

### 4.2.3 Integration Capabilities

Integra's Conversational AI can be integrated with:

- I. Any modern applications using REST APIs (Bi-directional data exchange)
- II. Business Intelligence tools like Power BI

- III. Active Directory
- IV. WhatsApp Integration
- V. Ticketing Tool System
- VI. LIVE Agent system
- VII. Any third-party APIs (REST) for legacy systems

## 4.2.4 Potential Use Cases for the Customer

### Use Case 1: Member Support for Software Tools

#### Problem Statement

Members and students often encounter errors while using various software tools and portals, leading to disruptions in their workflow.

#### Proposed Solution

The Help Desk BOT can quickly provide solutions to these errors by leveraging its comprehensive knowledge base and Generative AI capabilities. It can also connect users to live agents for more complex issues, ensuring minimal disruption in their workflow.

### Use Case 2: Student Assistance

#### Problem Statement

Students frequently face challenges and errors while accessing online study materials and resources.

#### Solution

The Help Desk BOT can assist students by providing immediate solutions to their issues. It can also offer detailed explanations and summaries, enhancing their understanding and learning experience.

## 5 Clientele List

**Integra has developed and implemented AI Based Solutions for our following clients:**

- Indian Bank
- ABB Global Industries & Services Private Limited (ABB)
- Assam Rural Infrastructure and Agricultural Services (ARIAS)
- Indian Oil Corporation Limited (IOCL)
- GAIL (India) Limited.
- PSB Alliance Private Limited (PSBA)