Project Development Phase
Sprint 2

Date	05 October 2022
Team ID	PNT2022TMID31585
Project Name	AI BASED DISCOURSE FOR BANKING INDUSTRY

Screenshots of Sprint 2 Tasks:

Creating Loan Account Actions:
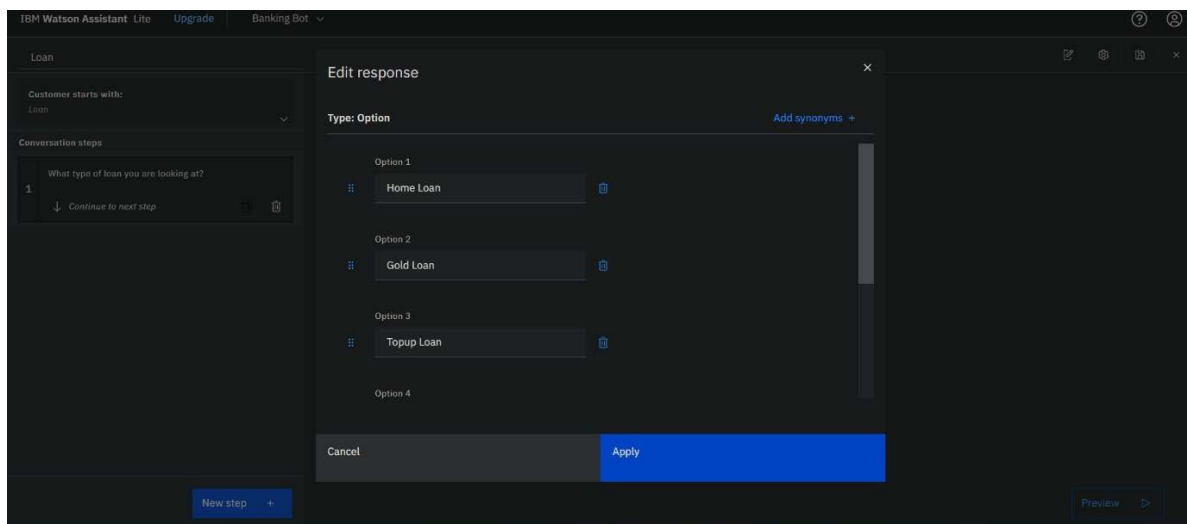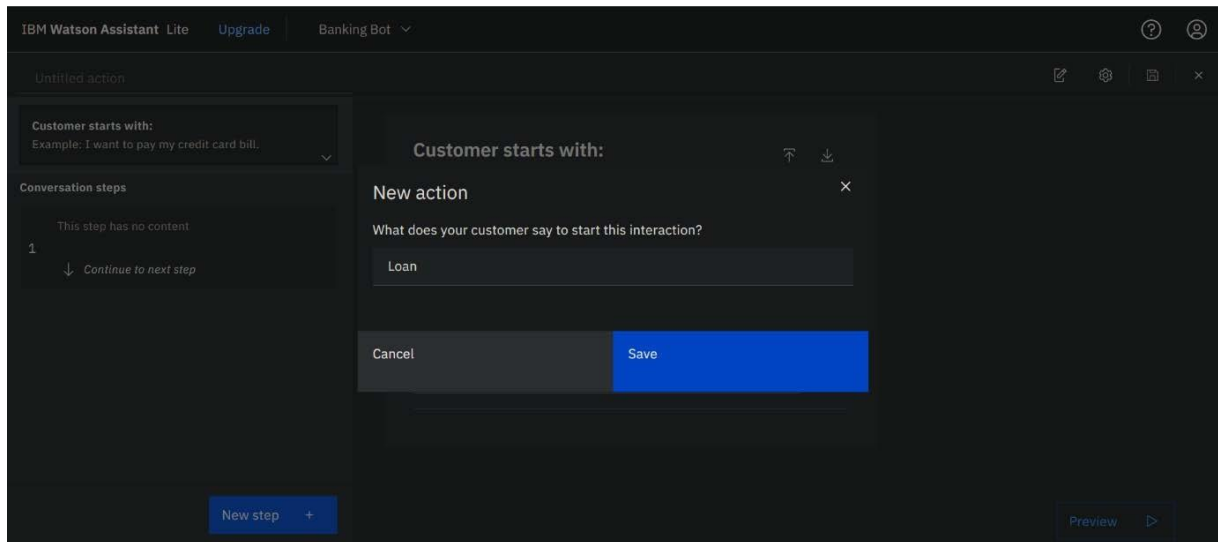
Screen 1

IBM **Watson Assistant** Lite   Upgrade   Banking Bot ⌄

Loan

1. What type of loan you are looking at?
 - Home Loan   Student Loan   + 3
 - ↓ Continue to next step

2. 1 is Gold Loan
 Please approach the bank with the following documents:
 T⊤ Free text
 ⇄ Go to action: **End**

3. 1 is Topup Loan
 To be eligible for top-up loan please contact our bank service providers with all existing...
 T⊤ Free text

New step +

Conditions   1 condition ⌃

If   All ⌄   of this is true:
   1. What typ...   is   Gold Loan   ✕
 and   Add condition +

New condition group +

Assistant says

B   I   ⌗   </>

Please approach the bank with the following documents:
 - PAN Card
 - Aadhaar Card
 - Passport size photos

Preview ▷

Screen 2

IBM **Watson Assistant** Lite   Upgrade   Banking Bot ⌄

Loan

↓ Continue to next step

2. 1 is Gold Loan
 Please approach the bank with the following documents:
 T⊤ Free text
 ⇄ Go to action: **End**

3. 1 is Topup Loan
 To be eligible for top-up loan please contact our bank service providers with all existing...
 T⊤ Free text
 ⇄ Go to action: **End**

1 is Vehicle Loan

New step +

Conditions   1 condition ⌃

If   All ⌄   of this is true:
   1. What typ...   is   Topup Loan   ✕
 and   Add condition +

New condition group +

Assistant says

B   I   ⌗   </>

To be eligible for top-up loan please contact our bank service providers with all existing loan details.

Preview ▷

Screen 3

IBM **Watson Assistant** Lite   Upgrade   Banking Bot ⌄

Loan

3. To be eligible for top-up loan please contact our bank service providers with all existing...
 T⊤ Free text
 ⇄ Go to action: **End**

4. 1 is Vehicle Loan
 Kindly approach the bank with the following documents:
 T⊤ Free text
 ⇄ Go to action: **End**

5. 1 is Student Loan
 Please visit the nearest available bank with the following documents.

New step +

  1. What typ...   is   Vehicle Loan   ✕
 and   Add condition +
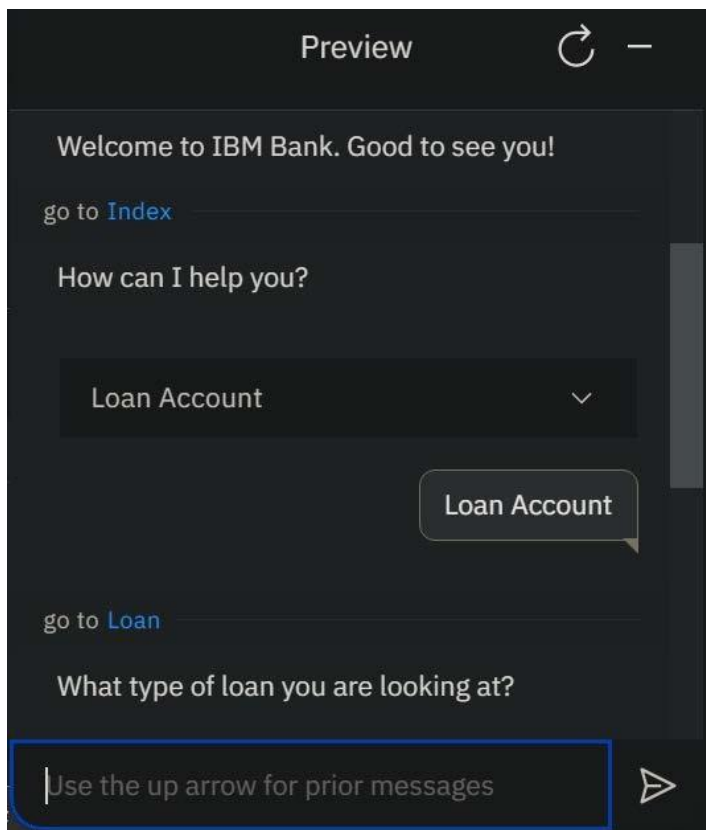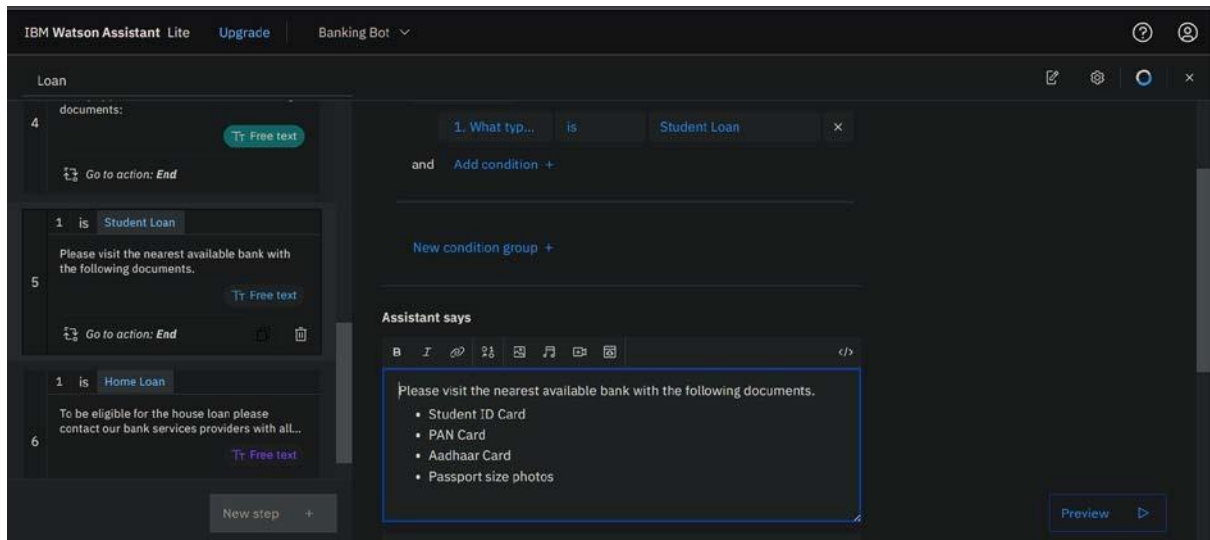
New condition group +

Assistant says

B   I   ⌗   </>

Kindly approach the bank with the following documents:
 - Automobile Invoice
 - PAN Card
 - Income Tax Returns for the last three years

User enters free text

Preview ▷

IBM Watson Assistant Lite · Upgrade · Banking Bot ⌄

Loan

4
documents:
Tт Free text
Go to action: **End**

1 is Student Loan

Please visit the nearest available bank with
the following documents.
Tт Free text

5
Go to action: **End**

1 is Home Loan

To be eligible for the house loan please
contact our bank services providers with all...
Tт Free text

6

New step +

1. What typ... is Student Loan ✕

and Add condition +

New condition group +

Assistant says

B I ⌗ ♫ ▭ ♫ ▭ ▤   </>

Please visit the nearest available bank with the following documents.
• Student ID Card
• PAN Card
• Aadhaar Card
• Passport size photos

Preview ▷

Preview ↻ —

Welcome to IBM Bank. Good to see you!

go to Index

How can I help you?

Loan Account ⌄

Loan Account

go to Loan

What type of loan you are looking at?

Use the up arrow for prior messages ▷

Creating General Query Action:

Edit response
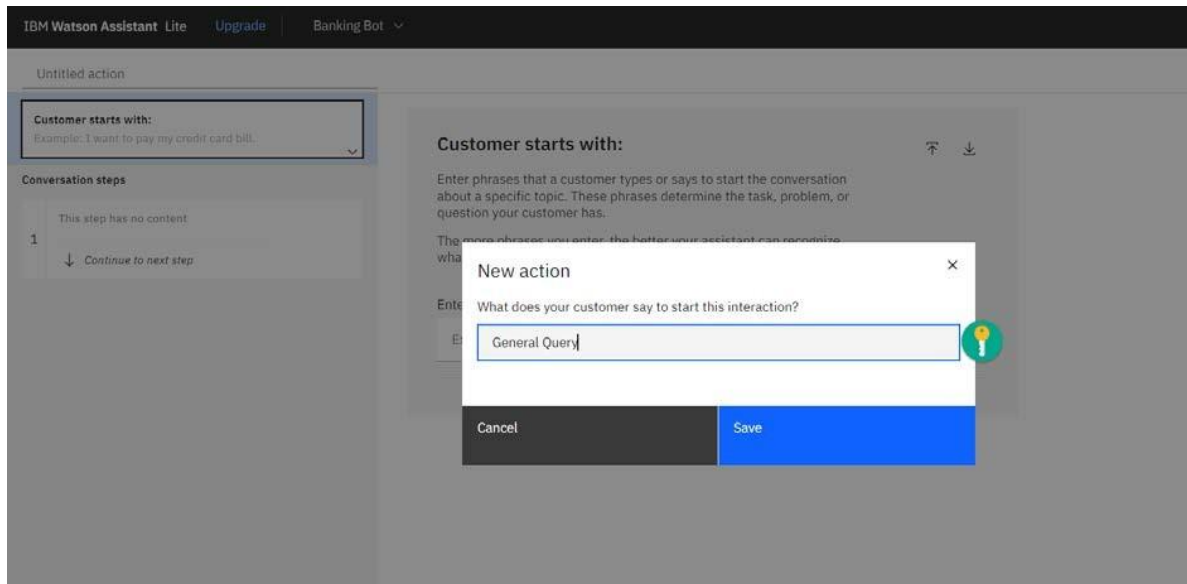
Type: Option   Add synonyms +

Option 1
⠿   Bank Working Days   🗑

Option 2
⠿   List of Branches   🗑

Option 3
⠿   Storage Locker Facility   🗑

Option 4

| Cancel | Apply |

General Query

Customer starts with:
General Query   ⌄

Conversation steps

Select the general queries listed below:

1   Bank Workin...   List of Branc...   + 4

↓ Continue to next step

1   is   Bank Working Days

2   The bank is open all days from Monday to Saturday
     from 9 AM to 3 PM, with exception of second...

                                    Tr Free text

↓ Continue to next step   📋   🗑

Assistant says

B I ⳙ ⅀ 🖼 🎵 📹 🖽   </>

The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of
secon...

Settings   ✕

Go to another action

Go to

| End   ✕ ⌄ |

☐ End this action after the other action is completed

| Cancel | Apply |

Goes to action   Missing action. Edit settings.   ⬤

Pass values

Upon return   Continue

General Query

Customer starts with:
General Query

Conversation steps

1. Select the general queries listed below:
   Bank Workin...   List of Branc...   + 4
   ↓ Continue to next step

2. 1 is Bank Working Days
   The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of second...
   ↓ Continue to next step

If   All ∨ of this is true:

| 1. Select the genera... | is | Bank Working Days | × |

and   Add condition +

New condition group +

Assistant says

B I ⊘ ⅜ ▣ ♫ ▣ ▣   </>

The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of second Saturdays.

& Define customer response   ∨

Index

Index   ∨

Conversation steps

1. How can I help you?
   General Quer...   Loan Account   + 3
   ↓ Continue to next step

2. 1 is Savings Account
   This step has no content
   ⇄ Go to action: **Savings**

3. 1 is Current Account
   This step has no content
   ⇄ Go to action: **Current**

4. 1 is General Queries
   This step has no content
   ↓ Continue to next step

Step 4 is taken   with conditions ∨   fₓ

Conditions   1 condition ∧

If   All ∨ of this is true:

| 1. How can I help yo... | is | General Queries | × |

and   Add condition +

New condition group +

Assistant says

B I ⊘ ⅜ ▣ ♫ ▣ ▣   </>

For example: Please select from the following options:

Greetings recognized

Welcome to IBM Bank. Good to see you!

go to **Index**

How can I help you?

| General Queries   ∨ |

                              General Queries

go to **General Query**

Select the general queries listed below:

| Select an option   ∨ |

---

go to **General Query**

Select the general queries listed below:

| Bank Working Days   ∨ |

                              Bank Working Days

❘ The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of second Saturdays.

Customer starts with:
General Query

Conversation steps

1. Select the general queries listed below:
   Currency Con... | CIBIL | + 4
   ↓ Continue to next step

2. 1 is Bank Working Days
   The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of second...
   T⊤ Free text
   ⤳ Go to action: **End**

3. 1 is List of Branches
   ADYAR,ALWARPET,ANNA NAGAR,AYANAVARAM,ASHOK NAGAR,EGMORE,RAMAPURAM,KK...
   T⊤ Free text
   ⤳ Go to action: **End**

New step +

Step 3 is taken   with conditions ∨   *f*x

Conditions   1 condition ∧

If   All ∨   of this is true:
   1. Select the genera...   is   List of Branches   ×

and   Add condition +

New condition group +

Assistant says

B *I* ⊘ ⧉ ⊠ ♫ ⊡ ⊙   </>

ADYAR,ALWARPET,ANNA NAGAR,AYANAVARAM,ASHOK NAGAR,EGMORE,RAMAPURAM,KK NAGAR,KARAPAKKAM,KOYAMBEDU,WEST MAMBALAM

User enters free text

Creating Netbanking Action:

Customer starts with:

Enter phrases that a customer types or says to start the conversation about a specific topic. These phrases determine the task, problem, or question your customer has.

The more phrases you enter, the better your assistant can recognize wha

New action   ×

What does your customer say to start this interaction?

Net Banking

Cancel   Save

Edit response

Type: Option

Add synonyms +

Option 1

⠿ What is Net Banking? 🗑

Option 2

⠿ How do I register for Net Banking? 🗑

Option 3

⠿ What are the features of Net Banking? 🗑

Option 4

Cancel	Apply

Net Banking

Customer starts with:
Net Banking ⌄

Conversation steps

1 | What queries do you have regarding Net banking?
[What is Net B...] [How do I regi...] [+ 2]
↓ Continue to next step

2 | 1 is [What is Net Banking?]
The facility offered by the bank allows customers to use banking services over the internet. Customers ne...
[Tᴛ Free text]
↓ Continue to next step   ⧉ 🗑

New step +

Step 2 is taken   with conditions ⌄ f_x

Conditions   1 condition ⌃

If [All ⌄] of this is true:

[1. What queries do ...] [is] [What is Net Banking?] ✕

and   Add condition +

New condition group +

Assistant says

B *I* ⧉ 🔢 🖼 🎵 🎬 🔲   </>

The facility offered by the bank allows customers to use banking services over the internet. Customers need not visit their banks branch office to avail each and every small service.

`User enters free text`

Net Banking

Customer starts with:
Net Banking ⌄

Conversation steps

What queries do you have regarding Net banking?
   What is Net B...   How do I regi...   + 2

1
↓ *Continue to next step*   ⧉   🗑

2
1   is   What is Net Banking?
The facility offered by the bank allows customers to use banking services over the internet. Customers ne...
   T丅 Free text
⇄ *Go to action:* **End**

3
1   is   How do I register for Net Banking?
Please download and fill up the net banking requisition form and submit it to your home branch.
   T丅 Free text
⇄ *Go to action:* **End**   ⧉   🗑

New step   +

Step 3 is taken   with conditions ⌄   ƒx

Conditions   1 condition ⌃

If   All ⌄   of this is true:

    1. What queries do ...   is   How do I register for Net Banking?   ✕

and   Add condition +

New condition group +

Assistant says

B   I   ⌐   ⸬   ▣   ♫   ▢   ◙   </>

Please download and fill up the net banking requisition form and submit it to your home branch.

User enters free text

Net Banking

    T丅 Free text
⇄ *Go to action:* **End**

3
1   is   How do I register for Net Banking?
Please download and fill up the net banking requisition form and submit it to your home branch.
   T丅 Free text
⇄ *Go to action:* **End**

4
1   is   What are the features of Net Banking?
- Check the account statement online - Open a fixed deposit account - Pay utility bills such as water bill...
   T丅 Free text
⇄ *Go to action:* **End**

5
1   is   Facing errors in Net Banking?
Please contact our Customer care executive or approach the closest branch.
   T丅 Free text
⇄ *Go to action:* **End**   ⧉   🗑

New step   +

Step 5 is taken   with conditions ⌄   ƒx

Conditions   1 condition ⌃

If   All ⌄   of this is true:

    1. What queries do ...   is   Facing errors in Net Banking?   ✕

and   Add condition +

New condition group +

Assistant says

B   I   ⌐   ⸬   ▣   ♫   ▢   ◙   </>

Please contact our Customer care executive or approach the closest branch.

User enters free text

Edit response   Edit validation

Net Banking

Tⴟ Free text

↳ *Go to action: **End***

1 is How do I register for Net Banking?

Please download and fill up the net banking
requisition form and submit it to your home branch.

3

Tⴟ Free text

↳ *Go to action: **End***

1 is What are the features of Net Banking?

The following are the features of a net banking
account: - Check the account statement online -...

4

Tⴟ Free text

↳ *Go to action: **End***

1 is Facing errors in Net Banking?

Please contact our Customer care executive or
approach the closest branch.

5

Tⴟ Free text

↳ *Go to action: **End***

and   Add condition +

New condition group +

Assistant says

B   *I*   �
   ⧉   ⌸   ♫   ▣   ▤   </>

The following are the features of a net banking account:

- Check the account statement online
- Open a fixed deposit account
- Pay utility bills such as water bills and electricity bills
- Make merchant payments
- Transfer funds
- Order a cheque book
- Buy general insurance
- Recharge prepaid mobile/DTH

User enters free text

Edit response   Edit validation   ⚙ ⇄ 🗑

go to **Net Banking** ───────────

What queries do you have regarding Net
banking?

What is Net Banking?

How do I register for Net Banking?

What are the features of Net Banking?

Facing errors in Net Banking?

How do I register for Net
Banking?

Please download and fill up the net banking
requisition form and submit it to your home
branch.

okay

Customer starts with:
Current

Conversation steps

What is your's company type?

1   Proprietorship   Partnership

↓ Continue to next step

1   is   Proprietorship

Please take the following documents and approach the
closest branch:
 1. Income tax returns of...

2   Tr Free text

⇄ Go to action: End

1   is   Partnership

Please take the following documents and approach the
closest branch
 1. Income tax returns of...

3   Tr Free text

↓ Continue to next step   ⎘   🗑

1. What is your's company type?   is   Partnership   ✕

and   Add condition +

New condition group +

Assistant says

B   I   ⌲   ⅌   ▣

Please take the followin

1. Income tax returns
2. Company Agreeme
3. Pan card for both p

Edit response   Edit v

And then

⇄ Goes to another action   ⌄

Goes to action   Missing action. Edit settings.   🔴

Settings   ✕

Go to another action

Go to

End   ✕   ⌄

☐ End this action after the other action is completed

Cancel   Apply