

Project Development Phase

Sprint - 2

Date	05 November 2022
Team ID	PNT2022TMID40098
Project Name	Project - AI based discourse for Banking Industry

Planning:

Sprint	Functional Requirement (Epic)	User Story Number	User Story / Task	Story Points	Priority	Team Members
Sprint-2	Modelling of Assistant	USN-3	Building action and Adding responses to Account Creation/As a user, I can see a Chatbot which helps to create an account	5	High	Sadain Abdullah N, Zaheeb Afnan A, Yashika U
Sprint-2		USN-4	Building action and Adding responses to Banking related queries/As a user, I can see a Chatbot which helps to solve the banking queries.	5	High	Earnest Wesley S, Sadain Abdullah N, Yashika U
Sprint-2		USN-5	Building action and Adding responses to Net Banking/As a user, I can see a Chatbot which helps to access Net Banking	5	High	Zaheeb Afnan A, Sadain Abdullah N, Yashika U
Sprint-2		USN-6	Building action and Adding responses to Loan Queries/As a user, I can see a Chatbot which helps in Loan related Queries.	5	High	Yashika U, Earnest Wesley S, Sadain Abdullah N

Steps-1: Building action and Adding responses to Account Creation:

IBM Watson Assistant Lite Upgrade Socio

Learning center

Savings Account

Customer starts with:
Savings Account

Conversation steps

1

Which type of savings account do you want to create?

Zero Balance... Regular Savi... +1

Continue to next step

1

is Regular Saving Account

Great! Please take the following documents and head towards the nearest branch.

Go to action: End

1

is Zero Balance Saving Account

Awesome! Please take the following documents and head towards the nearest branch.

Go to action: End

1

is Kids Saving Account

New step +

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 what the customer wants.

Enter phrases your customer might use to start this action Total: 3

Enter a phrase

Create Account

Savings

Savings Account

Preview >

Steps-2: Building action and Adding responses to Account Creation:

IBM Watson Assistant Lite Upgrade Socio

Learning center

General Query

Customer starts with:
General Query

Conversation steps

1

Select the general queries listed below.

Find a nearest... CIBIL... +4

Continue to next step

1

is Bank Working Days

The bank is open all days from Monday to Saturday from 9 am to 4 pm, with exception of 2nd...

Go to action: End

1

is Storage Locker Facility

It helps people who want to protect important documents, expensive items like heirloom jewelry...

Go to action: End

1

is List Of Branches

New step +

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 what the customer wants.

Enter phrases your customer might use to start this action Total: 2

Enter a phrase

Query

General Query

Preview >

Steps-3: Building action and Adding responses to Net Banking:

The screenshot shows the IBM Watson Assistant configuration interface for a 'Net Banking' topic. The left sidebar displays a list of conversation steps. The main area is divided into two sections: 'Customer starts with:' and 'Enter phrases your customer might use to start this 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 what the customer wants.

Enter phrases your customer might use to start this action Total: 3

Enter a phrase

Network Banking

Internet Banking

Net Banking

Conversation steps:

1 What queries do you have regarding Net Banking?

1 is Facing errors... What are the... + 2

Continue to next step

1 is What is Net Banking?

The facility offered by the bank allows customers to use banking services over the internet. Customers...

2 Go to action: End

1 is How do I register for Net Banking?

1. Navigate to the bank's official website. 2. Click on the "login" or "register" button. 3. Enter the account...

3 Go to action: End

1 is What are the features for Net Banking?

New step +

Preview ▶

Steps-4: Building action and Adding responses to Loan Queries:

The screenshot shows the IBM Watson Assistant configuration interface for a 'Loan Enquiry' topic. The left sidebar displays a list of conversation steps. The main area is divided into two sections: 'Customer starts with:' and 'Enter phrases your customer might use to start this 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 what the customer wants.

Enter phrases your customer might use to start this action Total: 2

Enter a phrase

Loan

Loan Enquiry

Conversation steps:

1 What type of loan are you looking at?

1 is Topup loan Student loan + 3

Continue to next step

1 is House loan

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

2 Go to action: End

1 is Gold loan

Please approach the bank with the following documents 1. Pan card 2. Aadhar card 3. Passport...

3 Go to action: End

1 is Topup loan

New step +

Preview ▶

Steps-5: Preview the Chatbot:

