

PROJECT DEVELOPMENT PHASE

PHASE SPRINT 2

Date	07 November 2022
Team ID	PNT2022TMID13205
Project Name	Ai Based Discourse For Banking Industry
Maximum Marks	8 Marks

Account Creation

IBM Watson Assistant Lite Upgrade Banking Chatbot Learning center

Create an account

Customer starts with:
Begin account

Conversation steps

1

I can help you with that! To create an account, we will need a few pieces of information. Let me gui...

Continue to next step

2

First, please provide your first name.

Try Free text

Continue to next step

3

Thanks! Now, enter your last name.

Try Free text

Continue to next step

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: 19

Account Creation

Where do I register for this?

Where do I find guidance on signing up?

Where does a first time visitor sign up?

Preview

IBM Watson Assistant Lite Upgrade Banking Chatbot Learning center

Create an account

Customer starts with:
Begin account

Conversation steps

1

I can help you with that! To create an account, we will need a few pieces of information. Let me gui...

Continue to next step

2

First, please provide your first name.

Try Free text

Continue to next step

Thanks! Now, enter your last name.

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: 20

Enter a phrase

Or joining here:

Create account

Preview

Greet customer [default]

Welcome, how can I assist you?

Account creation

Create an account recognized

I can help you with that! To create an account, we will need a few pieces of information. Let me guide you through this process!

First, please provide your first name.

Creation of Net Banking

IBM Watson Assistant Lite Upgrade Banking Chatbot Learning center

Net banking

Customer starts with:
Can you please help me set up autopayment

Conversation steps

1

To set up autopay, please enter your email address below.

Regex

Continue to next step

2

Great. Next, please enter your date of birth in MM-DD-YYYY format.

Date

Continue to next step

3

Thanks for the information. We've found you in our system!
 To configure autopay, we'll need...

Account x01... Account x00... + 2

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: 7

Enter a phrase

net banking

Set up autopay

Recurring payments

Preview

IBM Watson Assistant Lite Upgrade Banking Chatbot Learning center

Net banking

Customer starts with:
Can you please help me set up autopayment

Conversation steps

1

To set up autopay, please enter your email address below.

Regex

Continue to next step

2

Great. Next, please enter your date of birth in MM-DD-YYYY format.

Date

Continue to next step

3

Thanks for the information. We've found you in our system!
 To configure autopay, we'll need...

Account x01... Account x00... + 2

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: 7

Enter a phrase

net banking

Set up autopay

Recurring payments

Preview

net bankin

Net banking recognized

To set up autopay, please enter your email address below.

ibmteam@gmail.com

Great. Next, please enter your date of birth in MM-DD-YYYY format.

Choose a date (mm/dd/yyyy)

mm/dd/yyyy

08/08/2002

Type something...

Creation of Loan Queries

The image displays two screenshots of the IBM Watson Assistant interface, specifically the configuration page for a skill named 'Loan'.

Top Screenshot:

- Header:** IBM Watson Assistant | Lite | Upgrade | Banking Chatbot | Learning center
- Left Panel (Conversation steps):**
 - Customer starts with:** Loan
 - Step 1:** Welcome!!
 A genuine thanks for showing interest in our Loans. → Continue to next step
 - Step 2:** Okay. So what type of loan are you looking for? → Home Loan | personal loan → Continue to next step
 - Step 3:** 2 is Home Loan. As your source of income is vital for us to assure you a loan for your home, firstly please tell us... → Retried | Home maker | +3
- Right Panel (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: Total: 4
 - Input field: Enter a phrase
 - List of phrases: personal loan, How to apply loan, Home loan, Loan
- Buttons:** New step +, Preview

Bottom Screenshot:

- Header:** IBM Watson Assistant | Lite | Upgrade | Banking Chatbot | Learning center
- Left Panel:** Identical to the top screenshot.
- Right Panel:**
 - Customer starts with:** Identical to the top screenshot.
 - Preview Window:**
 - Loan recognized
 - Welcome!!
 - A genuine thanks for showing interest in our Loans.
 - Okay. So what type of loan are you looking for?
 - Home Loan | personal loan
 - Home Loan
 - As your source of income is vital for us to
 - Type something...

Note: In this Sprint 2, there is no code needed to create assistant and skills, it purely based on Actions and steps