

Project Development Phase Sprint 2

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Team ID	PNT2022TMID48085
Project Name	Project – AI BASED DISCOURSE FOR BANKING INDUSTRY

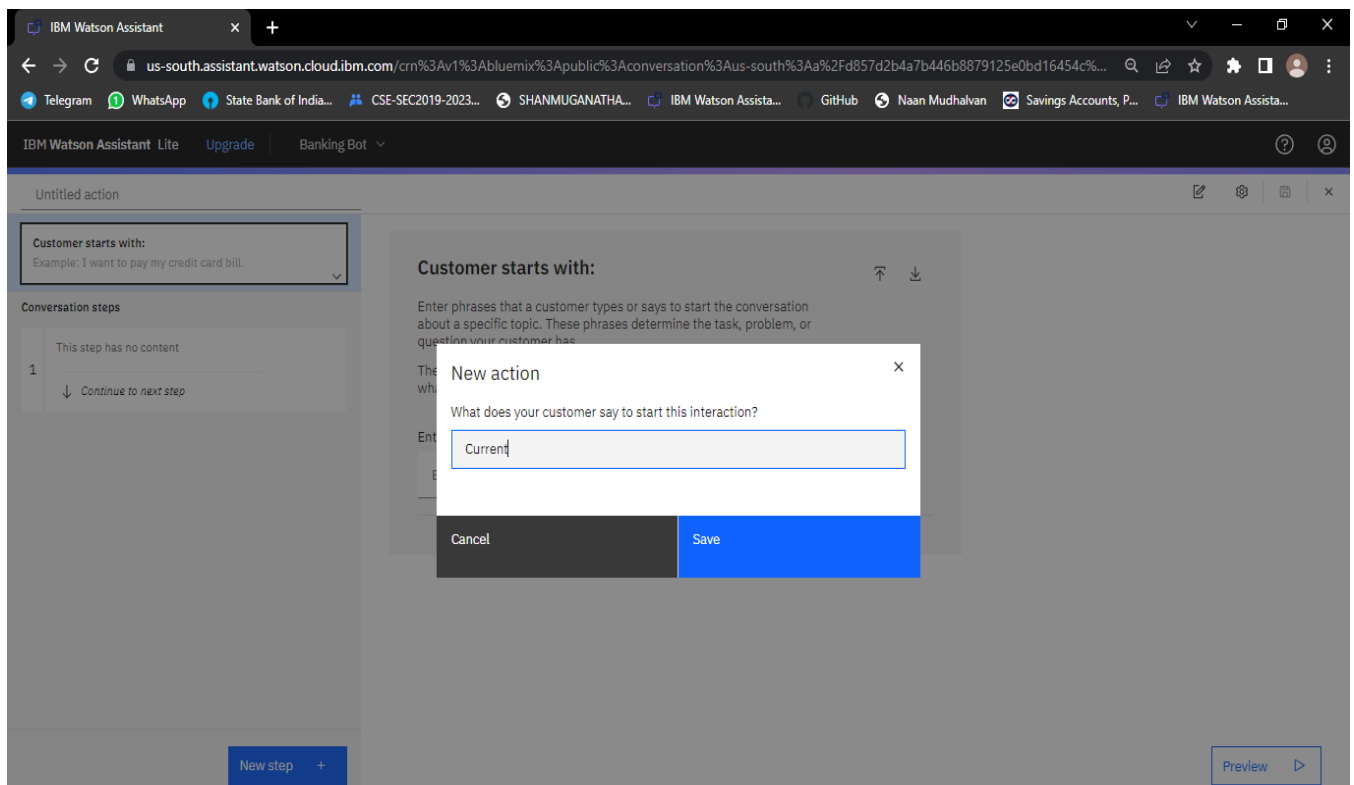
Sprint 2:

1. Creating Current Account Action.
2. Creating Loan Enquiry Action.

1. Creating Current Account Action

1.1 Create a new action for Current Account.

New action → Current → save



1.2 Customers interacts with “current account/current” and so on.

The screenshot shows the IBM Watson Assistant interface for a 'Current' conversation step. On the left, a summary box displays 'Customer starts with: Current' and a progress indicator: 1 total step, 0 end steps, and 0 re-ask steps. Below this, the 'Conversation steps' section shows a single step with the instruction 'This step has no content' and a 'Continue to next step' button. On the right, the 'Customer starts with:' section provides instructions on how to enter phrases that start a conversation. Below this, the 'Enter phrases your customer might use to start this action' section shows a text input field containing 'current account' and a 'Total: 1' indicator. A list of entered phrases shows 'Current' with a delete icon. At the bottom right, there is a 'Preview' button.

1.3 Assistant says the what’s your company type?

Add some customer responses → option → Create the options (proprietorship, partnership)

The screenshot shows the IBM Watson Assistant interface for a 'Current' conversation step. The 'Conversation steps' section shows a single step with the instruction 'What's your Company type?' and a 'Continue to next step' button. An 'Edit response' dialog box is open, showing the configuration for the response. The dialog has a 'Type: Option' section with an 'Add synonyms +' link. Below this, there are three options: 'Option 1' with the text 'Proprietorship', 'Option 2' with the text 'Partnership', and 'Option 3' with the text 'Example: Savings account'. Each option has a delete icon. At the bottom of the dialog, there are 'Cancel' and 'Apply' buttons. The background interface shows the same summary box and progress indicator as in the previous screenshot.

1.4 Create the Conversation steps (2) for the options in “proprietorship” (with conditions) and then go to another action click the “End”

The screenshot shows the IBM Watson Assistant configuration interface. On the left, the 'Conversation steps' panel shows Step 1 with the prompt 'What's your Company type?' and two options: 'Proprietorship' and 'Partnership'. Step 2 is highlighted, showing a prompt 'Please take the following Documents and approach the closest branch.' with a 'Free text' input field. The main panel shows the configuration for Step 2, which is set to 'with conditions'. A single condition is defined: 'If All of this is true: 1. What's your Com... is Proprietorship'. The 'Assistant says' panel shows the response: 'Please take the following Documents and approach the closest branch. 1)Income Tax Return of the proprietor for the last 3 years. 2)Company Agreement. 3)Pan cards.'

1.5 Create the Conversation steps (2) for the options in “Partnership” (with conditions) and then go to another action click the “End”

The screenshot shows the IBM Watson Assistant configuration interface. On the left, the 'Conversation steps' panel shows Step 1 with the prompt 'What's your Company type?' and two options: 'Proprietorship' and 'Partnership'. Step 2 is highlighted, showing a prompt 'Please take the following Documents and approach the closest branch.' with a 'Free text' input field. The main panel shows the configuration for Step 2, which is set to 'with conditions'. A single condition is defined: 'If All of this is true: 1. What's your Com... is Partnership'. The 'Assistant says' panel shows the response: 'Please take the following Documents and approach the closest branch. 1)Income Tax Return of the proprietor for the last 3 years. 2)Company Agreement. 3)Pan cards.' Below the response, there is a 'User enters free text' input field.

1.6 Next go to “Index” create a new step for “Current Account” and then choose the Go to another Action to choose the “Current”

The screenshot shows the IBM Watson Assistant interface for the 'Index' conversation step. The left sidebar shows the 'Conversation steps' list with three steps: 'How can I help you?', 'Savings account', and 'Current account'. The 'Current account' step is selected and highlighted. The main area shows the configuration for this step. The 'Assistant says' section contains a text input field with the placeholder 'For example: Please select from the following options:'. Below this is a 'Define customer response' dropdown. The 'And then' section shows a 'Go to another action' dropdown set to 'Current'. The 'Goes to action' field is set to 'Current', and the 'Pass values' field is empty. The 'Upon return' field is set to 'Continue'. There are 'Edit settings' and 'Edit passed values' links at the bottom. A 'Preview' button is located in the bottom right corner.

1.7 Current Account Action is successfully created and then choose the preview page.

The screenshot shows the IBM Watson Assistant interface for the 'Actions' list. The left sidebar shows the 'Actions' section with a list of actions: 'End', 'Greeting', 'Savings', 'Index', and 'Current'. The 'Current' action is selected and highlighted. The main area shows a table of actions with columns: Name, Last edited, Examples Count, Status, and a menu icon. The table contains five rows of actions. At the bottom, there is a pagination bar showing 'Items per page: 50' and 'Showing 1–5 of 5 actions'. A 'Preview' button is located in the bottom right corner.

Name	Last edited	Examples Count	Status	
End	2 days ago	1	✓	⋮
Greeting	2 days ago	4	✓	⋮
Savings	2 days ago	1	✓	⋮
Index	8 minutes ago	1	✓	⋮
Current	3 minutes ago	2	✓	⋮

1.8 Assistant Preview is open then the customer says the “Hi/Hello/Hey”→ Assistant says how can I help you? Shows the services → choose the “Current account” then company is” partnership”.

The screenshot shows the IBM Watson Assistant interface. On the left, the 'Actions' sidebar is open, displaying a list of actions created by the user. The main area shows a table of these actions. On the right, the 'Preview' window is open, showing a conversation flow. The user has selected 'Current account' and 'Partnership'.

Name	Last edited	Examples Count
End	2 days ago	1
Greeting	2 days ago	4
Savings	2 days ago	1
Index	8 minutes ago	1
Current	3 minutes ago	2

Items per page: 50 Showing 1–5 of 5 actions

Preview window content:

- Greeting recognized
- Good to see you...
- go to Index
- How can I help you?
- Current account (selected)
- Current account (button)
- go to Current
- What's your Company type?
- Partnership (selected)
- Partnership (button)

1.9 Shows some of the documents to approach the nearest bank.

The screenshot shows the IBM Watson Assistant interface. On the left, the 'Actions' sidebar is open, displaying a list of actions created by the user. The main area shows a table of these actions. On the right, the 'Preview' window is open, showing a conversation flow. The user has selected 'Partnership' and the assistant has provided a list of documents to approach the nearest bank.

Name	Last edited	Examples Count
End	2 days ago	1
Greeting	2 days ago	4
Savings	2 days ago	1
Index	8 minutes ago	1
Current	3 minutes ago	2

Items per page: 50 Showing 1–5 of 5 actions

Preview window content:

- go to Current
- What's your Company type?
- Partnership (selected)
- Partnership (button)
- Please take the following Documents and approach the closest branch.
- 1) Income Tax Return of the proprietor for the last 3 years.
- 2) Company Agreement.
- 3) Pan card of both partners.

1.10 Next Customer says “ok/thanks” → Assistant says do you know about some other services → Click the “Yes” to again show the services / Click the “No” Thank you. Have a nice day to complete the conversation.

The screenshot shows the IBM Watson Assistant interface. On the left, there's a sidebar with 'Actions' selected. The main area displays a table of actions created by the user:

Name	Last edited	Examples Count
End	2 days ago	1
Greeting	2 days ago	4
Savings	2 days ago	1
Index	8 minutes ago	1
Current	3 minutes ago	2

Below the table, it says 'Items per page: 50' and 'Showing 1–5 of 5 actions'. On the right, a 'Preview' window shows a conversation flow. It starts with a message 'Do you want to know about some other services?'. There are two response options: 'Yes' and 'No'. The 'No' option leads to a message 'Thank you. Have a nice day.' and then 'Greeting ended'.

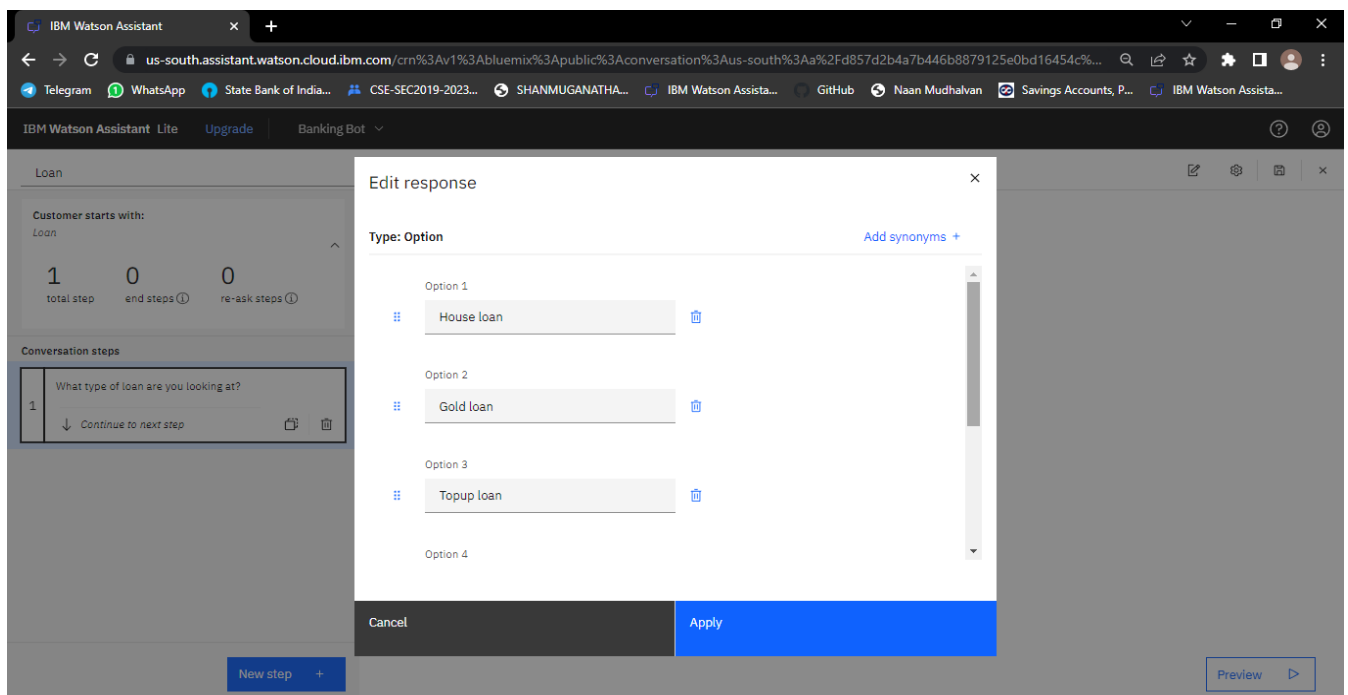
2.Creating Loan Enquiry Action

2.1 Create the New Action

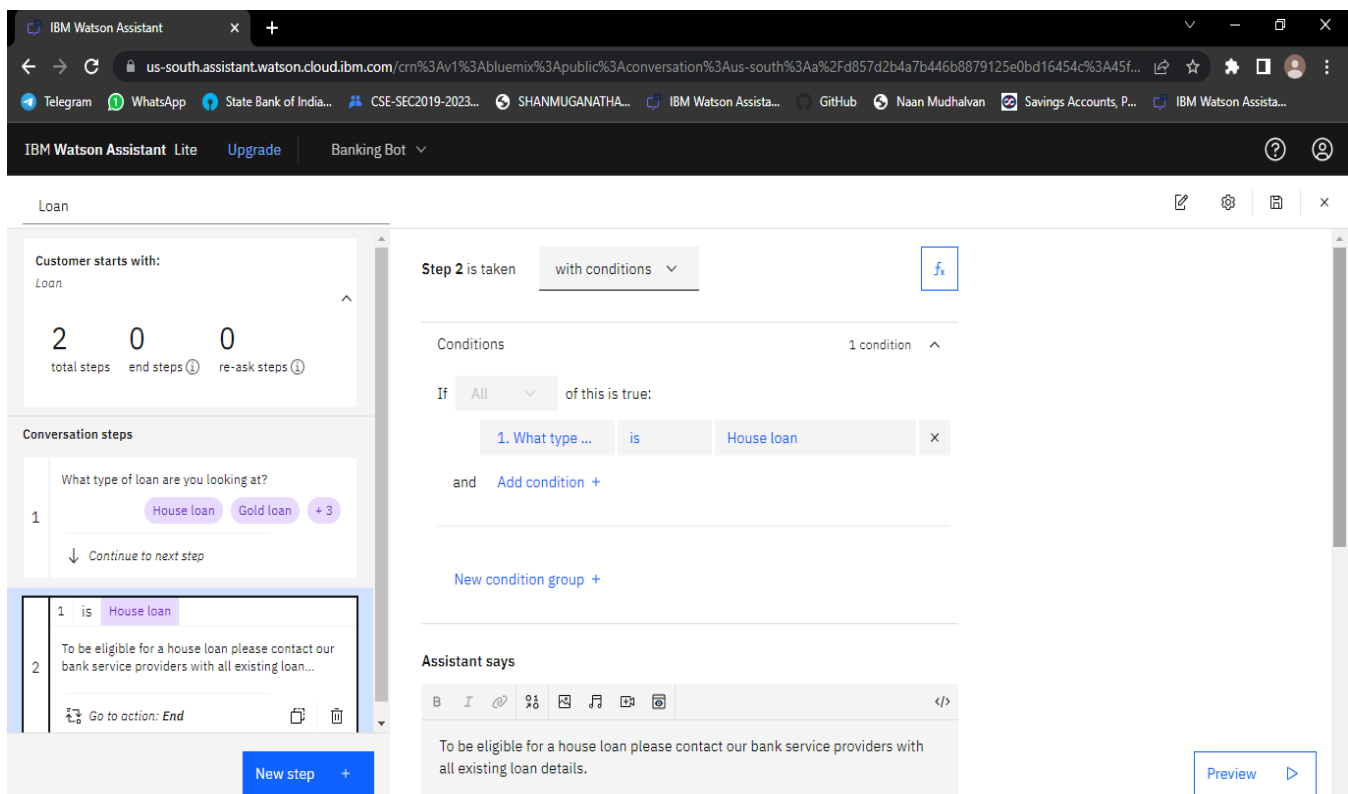
New action → Loan → save

The screenshot shows the 'New action' dialog box in the IBM Watson Assistant interface. The dialog has a title bar 'New action' and a close button. Inside, it asks 'What does your customer say to start this interaction?'. A text input field contains the word 'Loan'. At the bottom, there are two buttons: 'Cancel' and 'Save'. In the background, the 'Conversation steps' section is visible, showing a step with the text 'This step has no content' and a 'Continue to next step' button.

2.2 create the skill for assistant says (What type of loan are you looking at?) and then create some options (House loan, Gold loan, Top-up loan, Vehicle loan, Student loan)→ Click Apply



2.3 Create the Conversation steps (2) for the options in “House loan” (with conditions) and then go to another action click the “End”



2.4 Create the Conversation steps (3) for the options in “Gold loan” (with conditions) and then go to another action click the “End”

The screenshot shows the IBM Watson Assistant interface for a 'Loan' conversation. On the left, the 'Conversation steps' pane shows a flow starting with 'What type of loan are you looking at?' leading to 'House loan' and 'Gold loan'. Step 3 is highlighted for the 'Gold loan' path. The right pane shows the configuration for Step 3, which is 'with conditions'. The condition is '1. What type ... is Gold loan'. The assistant's response is 'Please approach the bank with the following documents. 1) Pan card 2) Aadhar card 3) Passport size photo'.

2.5 Create the Conversation steps (4) for the options in “Top-up loan” (with conditions) and then go to another action click the “End”

The screenshot shows the IBM Watson Assistant interface for a 'Loan' conversation. On the left, the 'Conversation steps' pane shows a flow starting with 'What type of loan are you looking at?' leading to 'House loan' and 'Gold loan'. Step 4 is highlighted for the 'Topup loan' path. The right pane shows the configuration for Step 4, which is 'with conditions'. The condition is '1. What type ... is Topup loan'. The assistant's response is 'To be eligible for a Top-up loan please contact our bank service providers with all existing loan details.'.

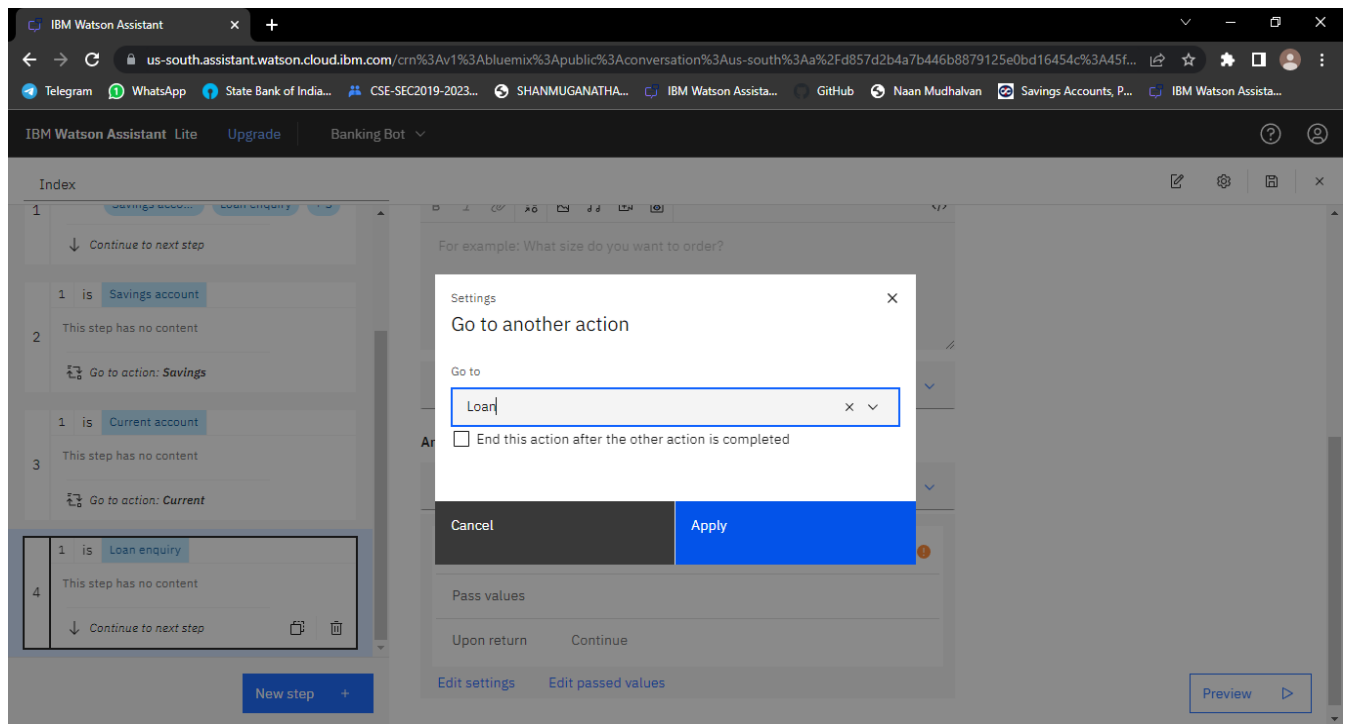
2.6 Create the Conversation steps (5) for the options in “Vehicle loan” (with conditions) and then go to another action click the “End”

The screenshot shows the IBM Watson Assistant interface for a "Loan" conversation. On the left, a list of steps is visible, with Step 5 highlighted. The main panel shows the configuration for Step 5, which is titled "Vehicle loan". The step is set to "with conditions". The conditions section shows a single condition: "1. What type ... is Vehicle loan". The assistant's response is configured to say: "Kindly approach the bank with the following documents. 1)Automobile Invoice 2)Pan card 3)Income Tax Return for the last 3 years". A "Preview" button is visible at the bottom right.

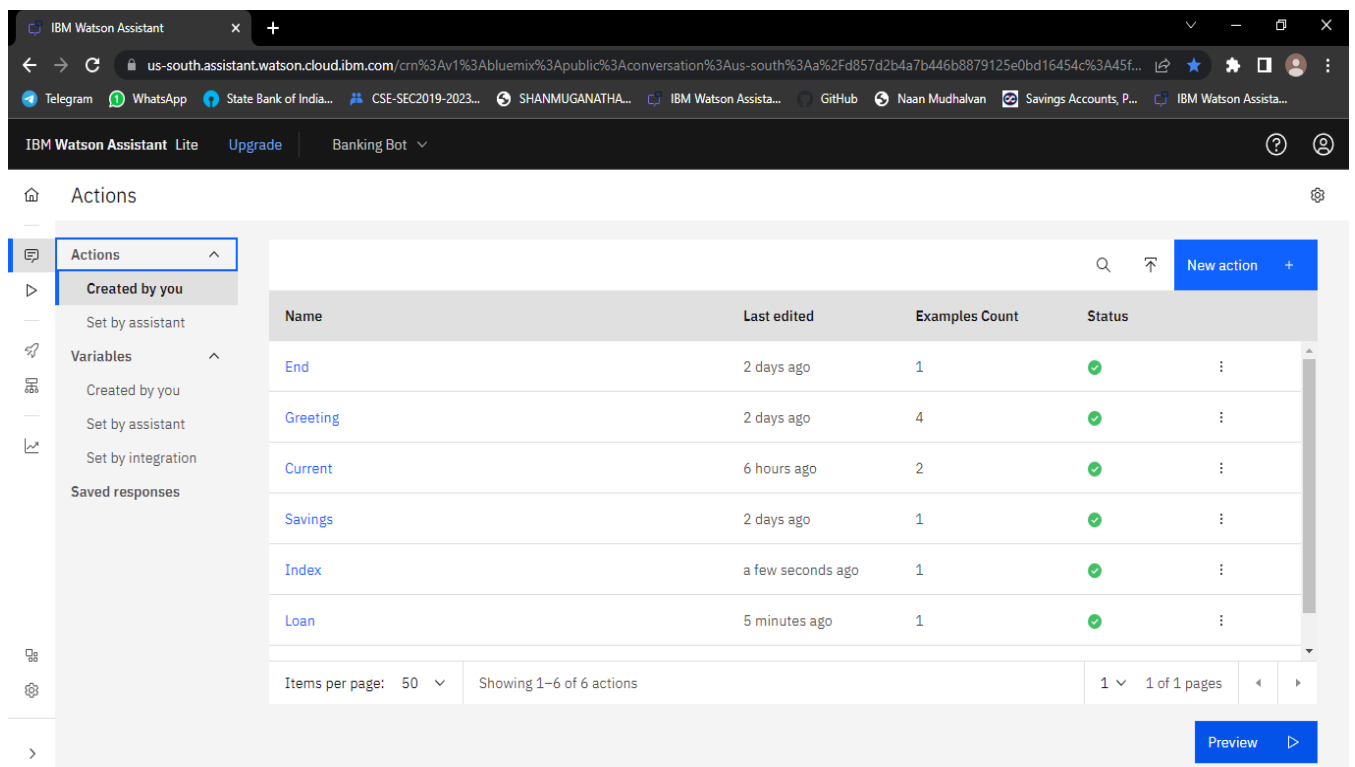
2.7 Create the Conversation steps (6) for the options in “Student loan” (with conditions) and then go to another action click the “End”

The screenshot shows the IBM Watson Assistant interface for a "Loan" conversation. On the left, a list of steps is visible, with Step 6 highlighted. The main panel shows the configuration for Step 6, which is titled "Student loan". The step is set to "with conditions". The conditions section shows a single condition: "1. What type ... is Student loan". The assistant's response is configured to say: "Please approach the bank with the following documents. 1)Acceptance Letter from Institution 2)Pan card 3)Passport size photos". A "Preview" button is visible at the bottom right.

2.8 Next go to “Index” create a new step for “Loan Enquiry” and then choose the Go to another Action to choose the “Loan”



2.9 Loan Enquiry Action is successfully created and then choose the preview page.



2.10 Assistant Preview is open then the customer says the “Hi/Hello/Hey”→ Assistant says how can I help you? Shows the services.

IBM Watson Assistant Lite Upgrade Banking Bot

Actions

Created by you

Name	Last edited	Example
End	2 days ago	1
Greeting	2 days ago	4
Current	2 minutes ago	2
Savings	a minute ago	1
Index	3 minutes ago	1
Loan	7 minutes ago	1

Items per page: 50 Showing 1–6 of 6 actions

Preview

Greeting recognized

Good to see you...

go to Index

How can I help you?

Select an option

- Savings account
- Current account
- Loan enquiry
- General query

Use the up arrow for prior messages

2.11 choose the “Loan Enquiry” then show the some types of loan services.

IBM Watson Assistant Lite Upgrade Banking Bot

Actions

Created by you

Name	Last edited	Example
End	2 days ago	1
Greeting	2 days ago	4
Current	2 minutes ago	2
Savings	a minute ago	1
Index	3 minutes ago	1
Loan	7 minutes ago	1

Items per page: 50 Showing 1–6 of 6 actions

Preview

Loan enquiry

go to Loan

What type of loan are you looking at?

Select an option

- House loan
- Gold loan
- Topup loan
- Vehicle loan

Type something...

2.12 choose the “House loan” assistant says the some and contact the bank

The screenshot shows the IBM Watson Assistant interface. The 'Actions' tab is selected, displaying a list of actions created by the user. The actions are: End, Greeting, Current, Savings, Index, and Loan. The 'Loan' action is highlighted. A preview window is open for the 'House loan' action, showing a message: 'To be eligible for a house loan please contact our bank service providers with all existing loan details.' and a link to 'go to End'. Below the message, there is a question: 'Do you want to know about some other services?' with 'Yes' and 'No' buttons. The 'No' button is selected.

Name	Last edited	Examples
End	2 days ago	1
Greeting	2 days ago	4
Current	2 minutes ago	2
Savings	a minute ago	1
Index	3 minutes ago	1
Loan	7 minutes ago	1

Items per page: 50 Showing 1–6 of 6 actions

2.13 Do you want to know about some other services? Customer click the “No” then complete the conversation.

The screenshot shows the IBM Watson Assistant interface. The 'Actions' tab is selected, displaying a list of actions created by the user. The actions are: End, Greeting, Current, Savings, Index, and Loan. The 'Loan' action is highlighted. A preview window is open for the 'House loan' action, showing a message: 'To be eligible for a house loan please contact our bank service providers with all existing loan details.' and a link to 'go to End'. Below the message, there is a question: 'Do you want to know about some other services?' with 'Yes' and 'No' buttons. The 'No' button is selected. Below the question, there is a message: 'Thank you. Have a nice day.' and a note: 'There are no additional steps for this action. Add a new step or end the action.' The 'Greeting ended' status is shown at the bottom of the preview window.

Name	Last edited	Examples
End	2 days ago	1
Greeting	2 days ago	4
Current	2 minutes ago	2
Savings	a minute ago	1
Index	3 minutes ago	1
Loan	7 minutes ago	1

Items per page: 50 Showing 1–6 of 6 actions