

Project Development Phase

Sprint 1

Date	4 November 2022
Team ID	PNT2022TMID03539
Project Name	AI BASED DISCOURSE FOR BANKING INDUSTRY

Screenshots of Sprint 1 Tasks:

Create IBM Watson Assistant Service:

IBM Watson Assistant Lite Upgrade

Welcome to the new Watson Assistant [Next](#)

Create Personalize Customize Preview

Create your first assistant

Let's get your assistant up and running. Name your assistant, add a description, and choose a language. In following steps we'll gather more information, show you basic customizations, and give you a preview of what your assistant will look like.

Assistant name

Banking Bot

Your assistant name will be kept internally and not visible to your customers

Description (optional) 0/128

IBM Watson Assistant Lite Upgrade Banking Bot

Welcome to the new Watson Assistant [Back](#) [Next](#)

Where do you plan on deploying your assistant?

Web

Tell us about yourself

This information will be used to personalize your onboarding experience.

Which industry do you work in?

Banking and financial services

What is your role on the team building the assistant?

Developer

Which statement describes your needs best?

I'm using Watson Assistant to complete a course or certif

Do you have the Speed Demons in stock?

The Speed Demons are in stock at our Downtown and Northgate locations, which are both within five miles of you.

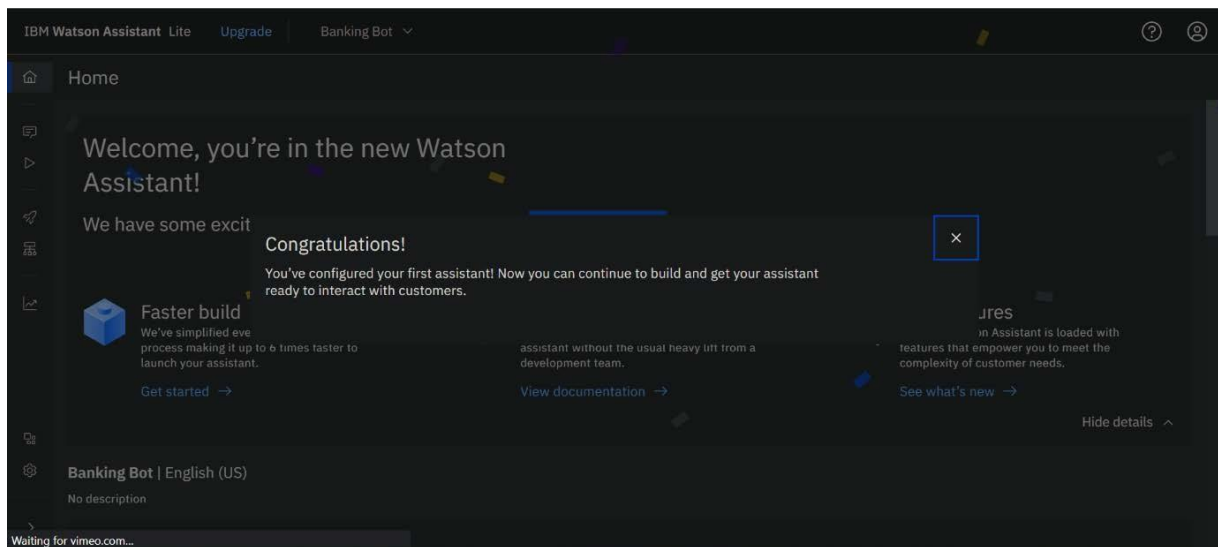
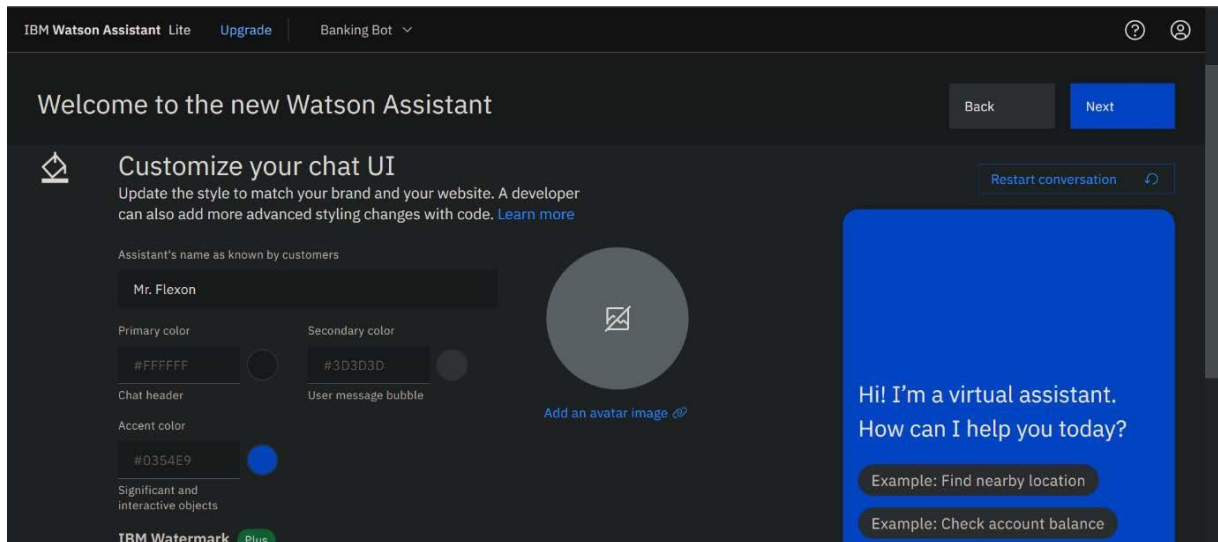
What size and color do you need?

I'm looking for a size nine in white

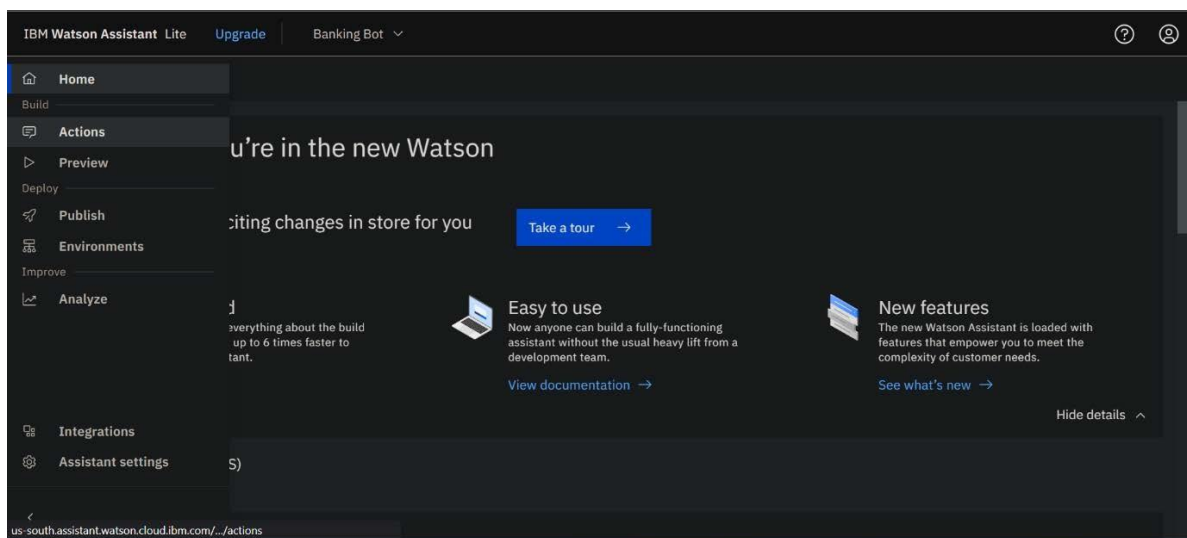
Great news! The Speed Demons are available in white in a size 9.

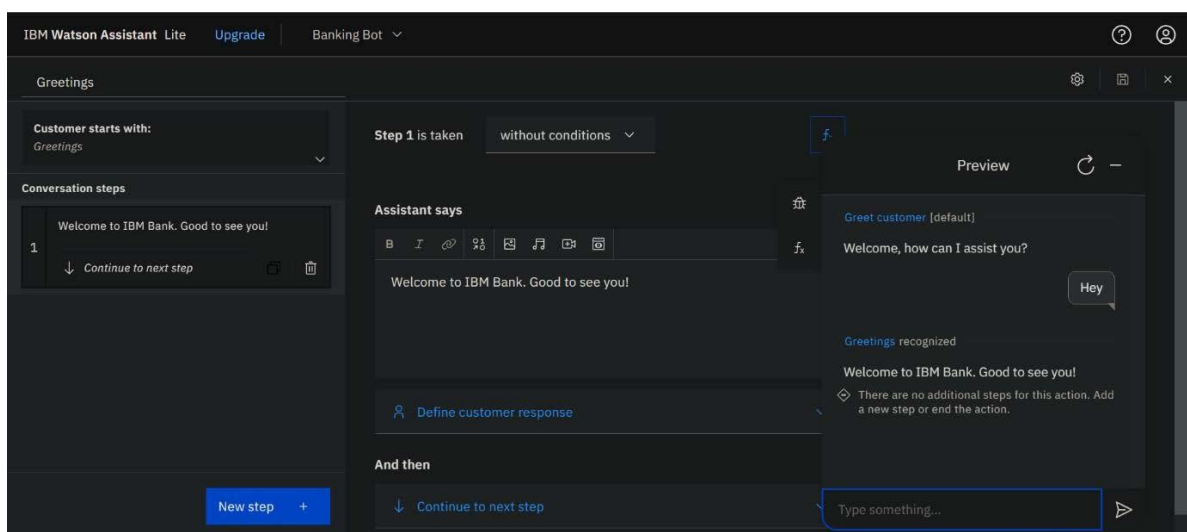
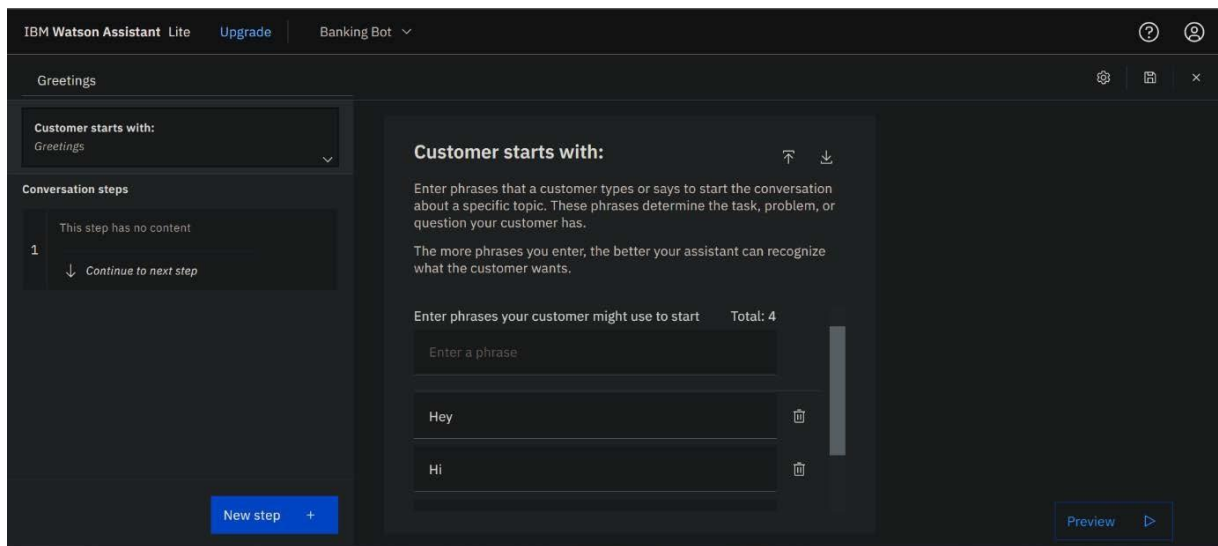
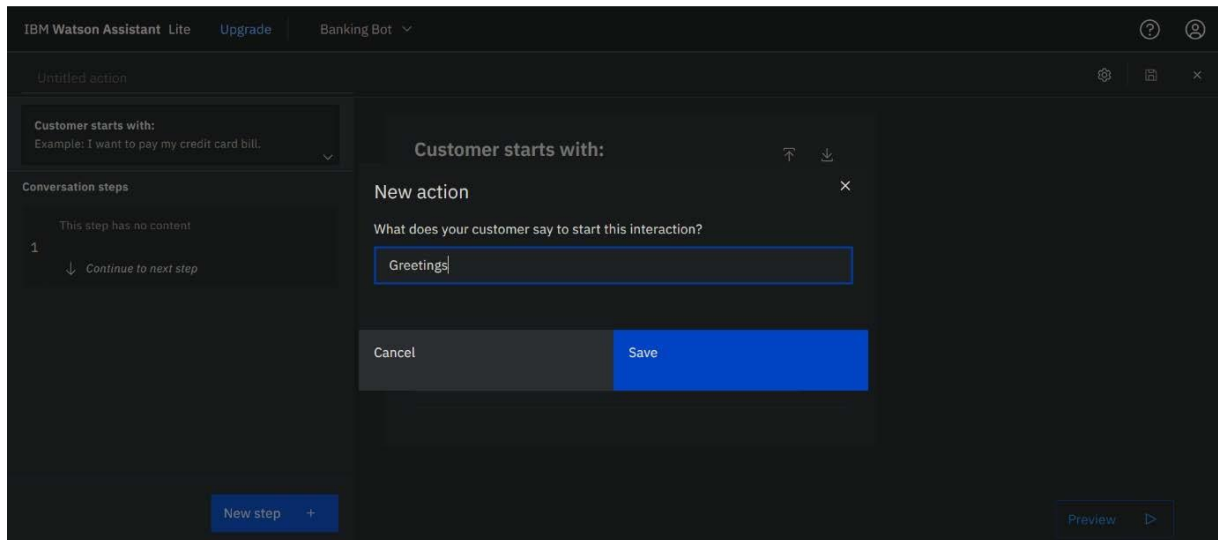
You can purchase them for curbside pick up or we can ship them to you. Which would you prefer?

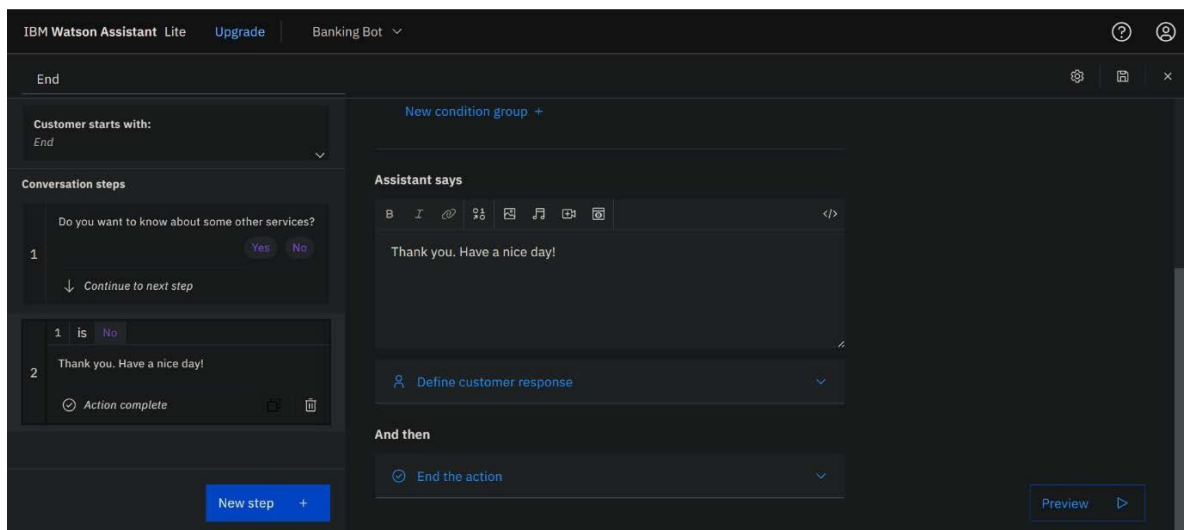
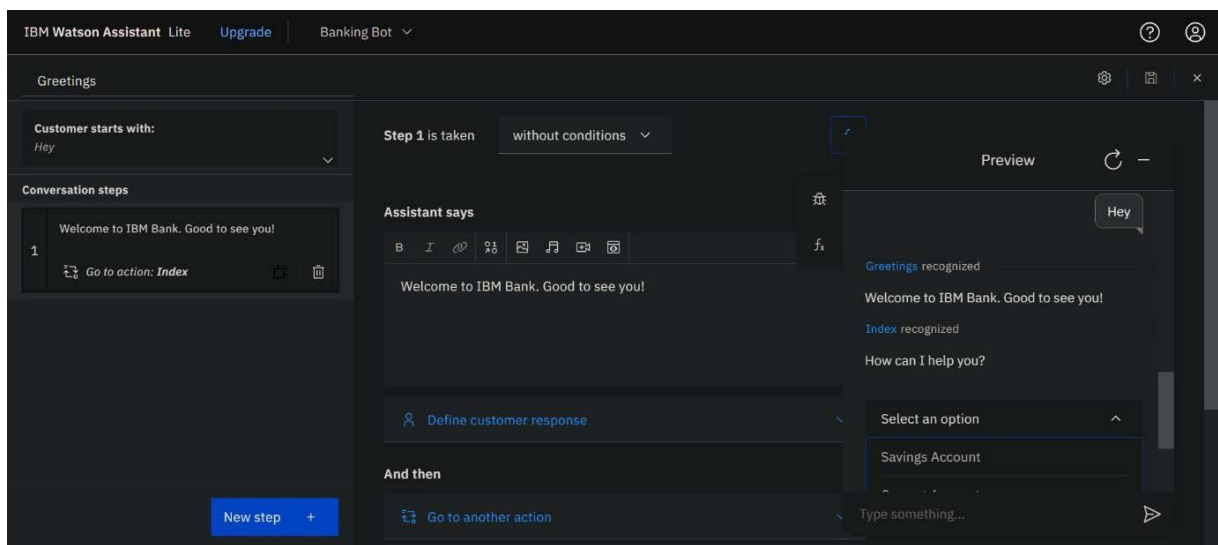
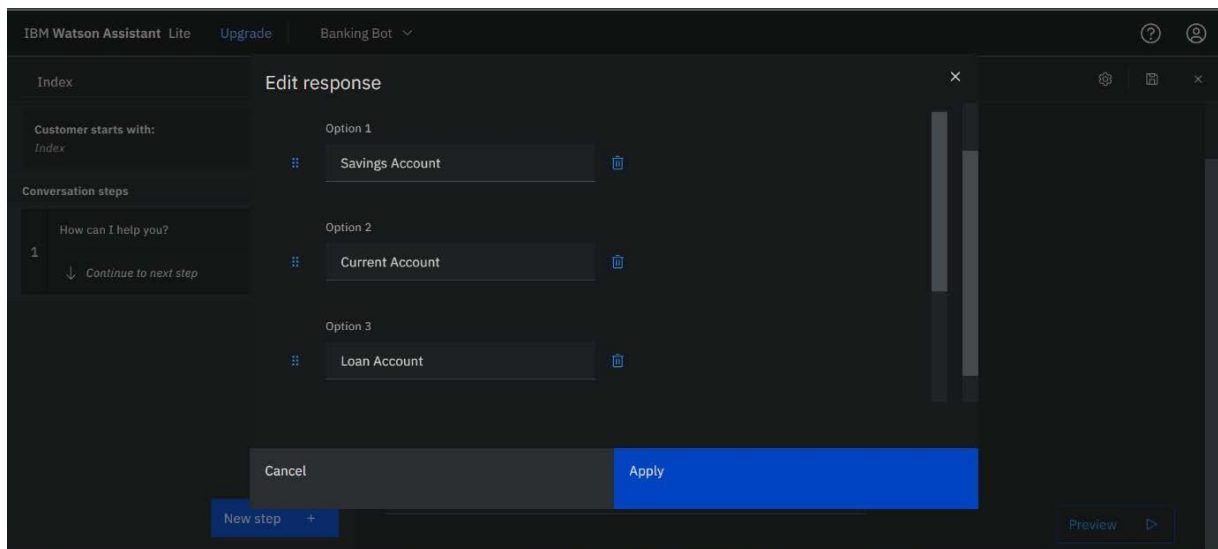
I'll pick them up! Ship them to me, please!



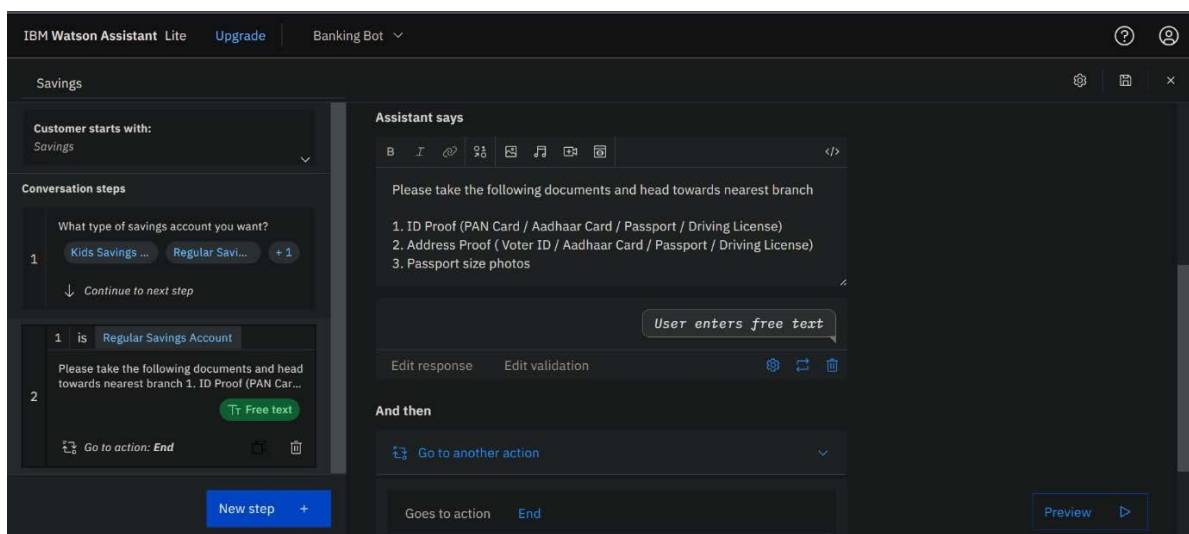
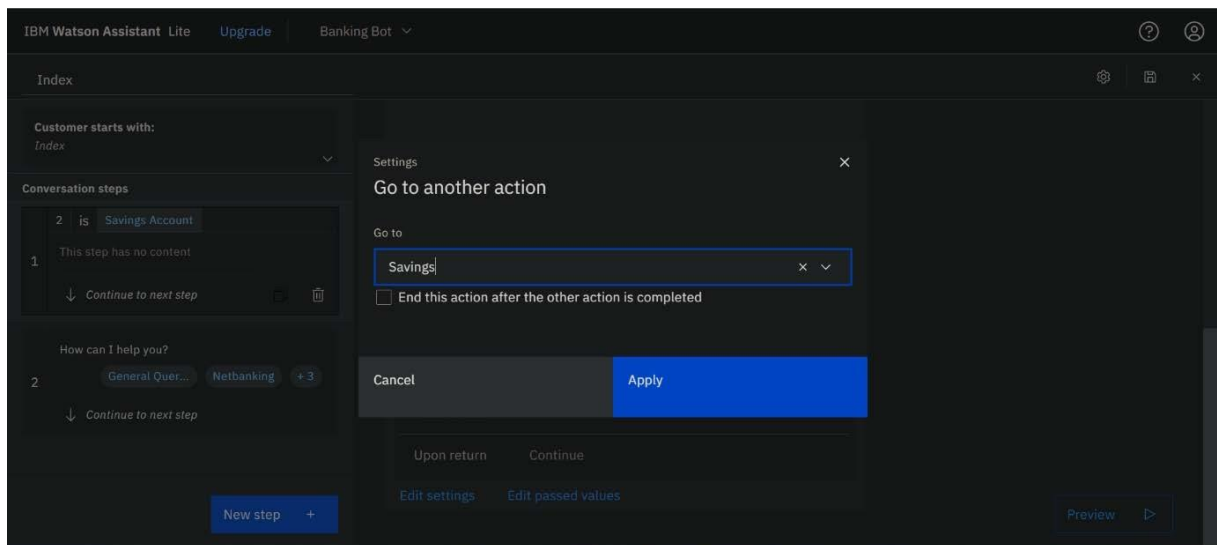
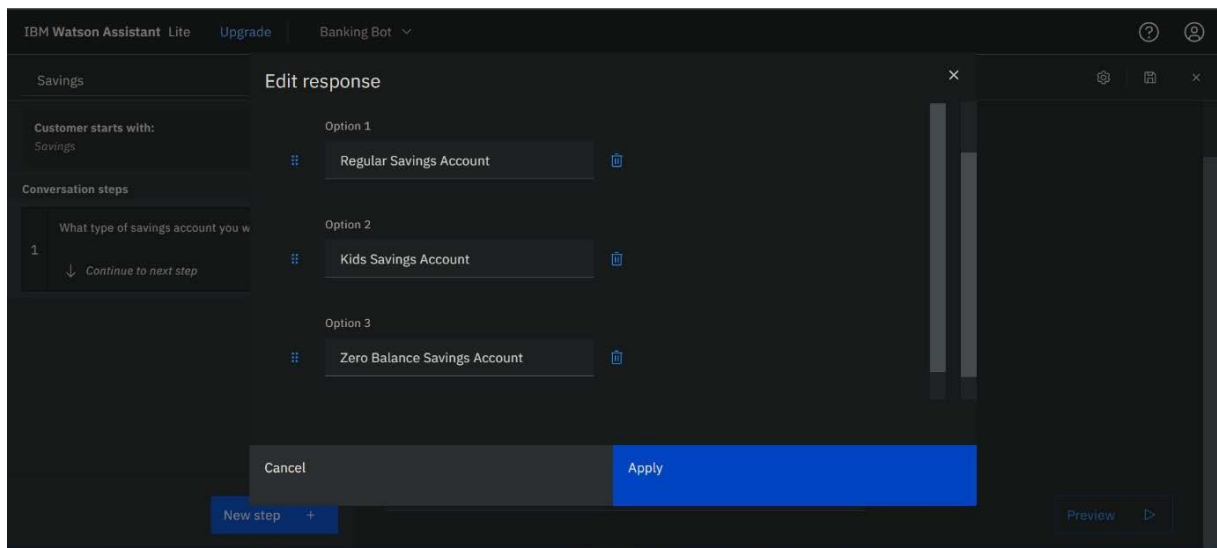
Chatbot Skills Creation:







Creating Savings Account Action:



IBM Watson Assistant Lite Upgrade Banking Bot

Savings

Customer starts with: Savings

Conversation steps

1 What type of savings account you want?
Kids Savings ... Regular Savi... +1
Continue to next step

1 is Regular Savings Account

2 Please take the following documents and head towards nearest branch 1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License) 2. Address Proof (Voter ID / Aadhaar Card / Passport / Driving License) 3. Passport size photos
Free text
Go to action: End

New step +

Assistant says

Please take the following documents and head towards nearest b

1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License)
2. Address Proof (Voter ID / Aadhaar Card / Passport / Driving License)
3. Passport size photos

User enters free text

Edit response Edit validation

And then

Go to another action

Goes to action End

Preview

Savings Account

Savings recognized

What type of savings account you want?

Regular Savings Account
Kids Savings Account
Zero Balance Savings Account

Regular Savings Account

Use the up arrow for prior messages

IBM Watson Assistant Lite Upgrade Banking Bot

Savings

Customer starts with: Savings

Conversation steps

1 What type of savings account you want?
Kids Savings ... Regular Savi... +1
Continue to next step

1 is Regular Savings Account

2 Please take the following documents and head towards nearest branch 1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License) 2. Address Proof (Voter ID / Aadhaar Card / Passport / Driving License) 3. Passport size photos
Free text
Go to action: End

New step +

Assistant says

Please take the following documents and head towards nearest b

1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License)
2. Address Proof (Voter ID / Aadhaar Card / Passport / Driving License)
3. Passport size photos

User enters free text

Edit response Edit validation

And then

Go to another action

Goes to action End

Preview

Please take the following documents and head towards nearest branch

1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License)
2. Address Proof (Voter ID / Aadhaar Card / Passport / Driving License)
3. Passport size photos

Okay!

End recognized

Do you want to know about some other

Type something...

IBM Watson Assistant Lite Upgrade Banking Bot

Savings

Customer starts with: Savings

Conversation steps

1 What type of savings account you want?
Kids Savings ... Regular Savi... +1
Continue to next step

1 is Regular Savings Account

2 Please take the following documents and head towards nearest branch 1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License) 2. Address Proof (Voter ID / Aadhaar Card / Passport / Driving License) 3. Passport size photos
Free text
Go to action: End

New step +

Assistant says

Please take the following documents and head towards nearest b

1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License)
2. Address Proof (Voter ID / Aadhaar Card / Passport / Driving License)
3. Passport size photos

User enters free text

Edit response Edit validation

And then

Go to another action

Goes to action End

Preview

End recognized

Do you want to know about some other services?

Yes No

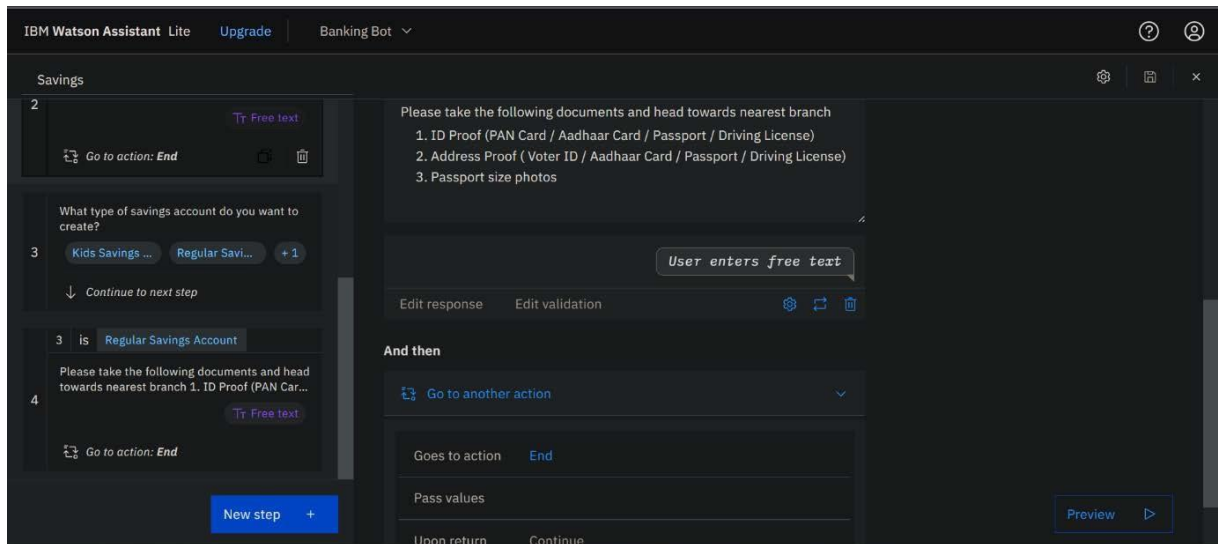
No

Thank you. Have a nice day!

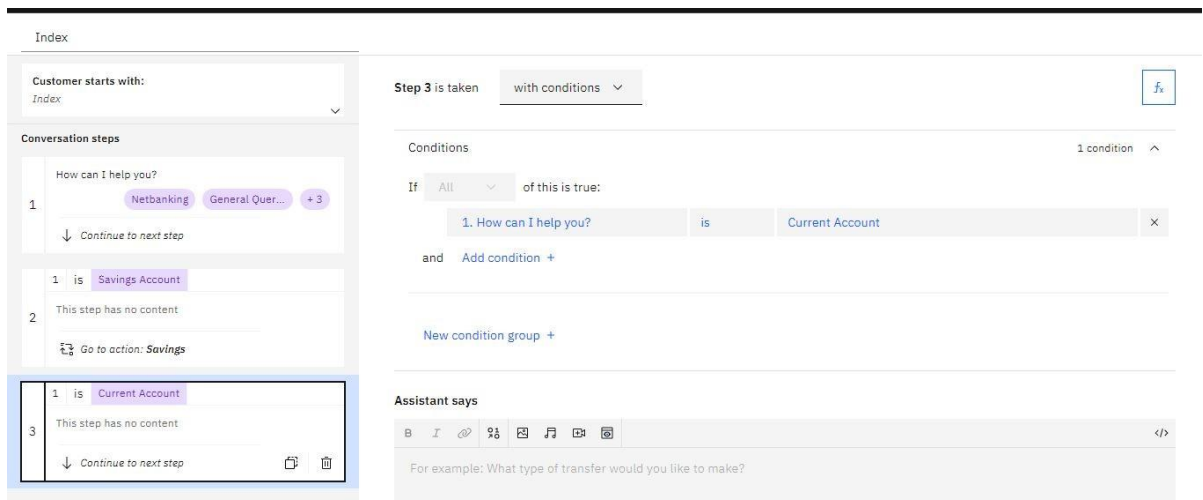
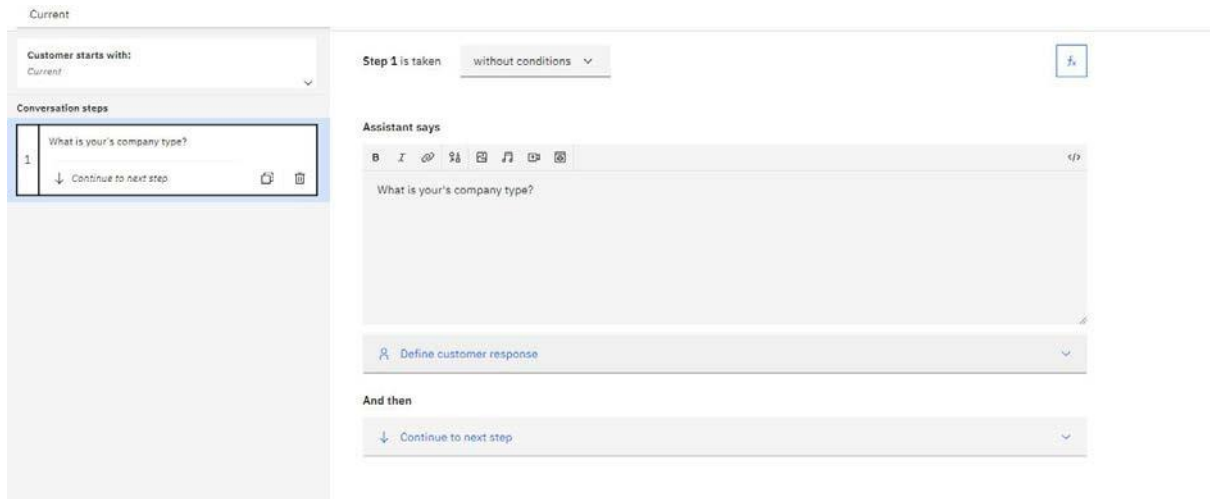
Greetings recognized

There are no additional steps for this action. Add a new step or end the action.

Use the up arrow for prior messages



Creating Current Account Action:



Current

Customer starts with:
Current

Conversation steps

1

What is your's company type?

Proprietorship Partnership

Continue to next step

2

1 is Proprietorship

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

Continue to next step

Step 2 is taken

with conditions

fx

Conditions

1 condition

If All of this is true:

1. What is your's company type? is Proprietorship

and Add condition +

New condition group +

Assistant says

Please take the following documents and approach the closest branch:

1. Income tax returns of proprietor for last 3 years

2. Company Agreement

3. Pan card

Current

Customer starts with:
Current

Conversation steps

1

What is your's company type?

Proprietorship Partnership

Continue to next step

1 is Proprietorship

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

Go to action: End

2

1 is Partnership

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

Continue to next step

Step 3 is taken

with conditions

fx

Conditions

1 condition

If All of this is true:

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

and Add condition +

New condition group +

Assistant says

Please take the following documents and approach the closest branch:

1. Income tax returns of proprietor for last 3 years

2. Company Agreement

3. Pan card for both partners

1 is Proprietorship

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

Continue to next step

New condition group +

Assistant says

Please take the following documents and approach the closest branch:

1. Income tax returns of proprietor for last 3 years

2. Company Agreement

3. Pan card

User enters free text

Current

Customer starts with:
Current

Conversation steps

1

What is your's company type?

Proprietorship Partnership

Continue to next step

2

1 is Proprietorship

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

To Free text

Go to action: End

3

1 is Partnership

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

To Free text

Continue to next step

1. What is your's company type?

is

Partnership

and Add condition

New condition group

Assistant says

Please take the following

1. Income tax returns

2. Company Agreement

3. Pan card for both

Edit response Edit v

And then

Go 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