

# Project Development Phase

## Delivery of Sprint-1

<b>Date</b>	03.11.2022
<b>Team Id</b>	PNT2022TMID01145
<b>Project Name</b>	AI Based Discourse for Banking Industry

### Greetings:

**Greetings**

Customer starts with:  
Hey

**Conversation steps**

- Good to see you.  
Go to action: **Index**

**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 conversation. Total: 4  
Enter a phrase

**Preview**

Greet customer [default]  
Welcome, how can I assist you?  
hi  
Greetings recognized  
Good to see you.

### Creation of Account or Application:

**Create an account (1)**

Customer starts with:  
application register

**Conversation steps**

- I can help you with that! To create an account or register for application, we will need a few pieces of information. Let me guide you through this process!  
Continue to next step
- First, please provide your first name.  
Free text
- Thanks! Now, enter your last name.  
Free text

**Step 1 is taken** without conditions

**Assistant says**

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

Define customer response

**And then**

Continue to next step

**Preview**

Index recognized  
How can I help you?  
Account Creation or Application Registration  
Create an account (1) recognized  
I can help you with that! To create an account or register for application, we will need a few pieces of information. Let me guide you through this process!

2

First, please provide your first name.

Tr Free text

Continue to next step

3

Thanks! Now, enter your last name.

Tr Free text

Continue to next step

Awesome. I'll also need an email address

New step +

First, please provide your **first** name.

User enters free text

Edit response Edit validation

And then

Continue to next step

Account Creation or Application ...

Account Creation or Application Registration

Create an account (1) recognized

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

First, please provide your **first** name.

Type something...

3

Thanks! Now, enter your last name.

Tr Free text

Continue to next step

4

Awesome. I'll also need an email address associated with your new account. We will...

Regex

Continue to next step

New step +

Thanks! Now, enter your **last** name.

User enters free text

Edit response Edit validation

And then

Continue to next step

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

First, please provide your **first** name.

john

Thanks! Now, enter your **last** name.

jacob

Type something...

4

Awesome. I'll also need an email address associated with your new account. We will...

Regex

Continue to next step

5

For added security, we can also add a phone number to your account. Would you like to d...

Yes, I'd like t... No, my email...

Continue to next step

Awesome. I'll also need an email address associated with your new account. We will need to send you an email to confirm it's really you!

Which **email address** would you like to use?

Assistant recognizes pattern in user's text

Edit response Edit validation

And then

Thanks! Now, enter your **last** name.

jacob

Awesome. I'll also need an email address associated with your new account. We will need to send you an email to confirm it's really you!

Which **email address** would you like to use?

john@gmail.com

For added security, we can also add a phone

5

For added security, we can also add a phone number to your account. Would you like to d...

Yes, I'd like t... No, my email...

Continue to next step

6

Okay, please enter your phone number below.

Regex

Continue to next step

For added security, we can also add a phone number to your account. Would you like to do so?

Yes, I'd like to add a phone number. No, my email will do just fine.

Edit response Edit validation

And then

Continue to next step

you:

Which **email address** would you like to use?

john@gmail.com

For added security, we can also add a phone number to your account. Would you like to do so?

Yes, I'd like to add a phone number. No, my email will do just fine.

5 is Yes, I'd like to add a phone number.

6 Okay, please enter your phone number below.

Continue to next step

5 is No, my email will do just fine.

7 No problem, let's keep going!

Continue to next step

New step +

Assistant says

Okay, please enter your phone number below.

Assistant recognizes pattern in user's text

Edit response Edit validation

For added security, we can also add a phone number to your account. Would you like to do so?

Yes, I'd like to add a phone number.

No, my email will do just fine.

Yes, I'd like to add a phone number.

Okay, please enter your phone number below.

Type something...

8 Enter your AADHAR Number

Continue to next step

9 Finally, I'll also need your date of birth in MMDDYYYY format. This will also serve as...

Continue to next step

New step +

Enter your AADHAR Number

User enters a number

Edit response Edit validation

And then

Continue to next step

Yes, I'd like to add a phone number.

No, my email will do just fine.

Yes, I'd like to add a phone number.

Okay, please enter your phone number below.

000099999

Enter your AADHAR Number

Use the up arrow for prior messages

9 Finally, I'll also need your date of birth in MMDDYYYY format. This will also serve as...

Continue to next step

10 Confirm your PIN or Password. Step 9

Confirmation

Continue to next step

Finally, I'll also need your date of birth in MMDDYYYY format. This will also serve as your 8-digit authentication PIN.

Keep this number handy in case you are locked out of your account.

mm/dd/yyyy

Edit response Edit validation

And then

Finally, I'll also need your date of birth in MMDDYYYY format. This will also serve as your 8-digit authentication PIN.

Keep this number handy in case you are locked out of your account.

Choose a date (mm/dd/yyyy)

mm/dd/yyyy

10 Confirm your PIN or Password. Step 9

Confirmation

Continue to next step

6 is Defined

5 is Yes, I'd like ...

11 Thanks! Does the following information look correct? If so, I will proceed with creating...

Confirmation

Confirm your PIN or Password.

9. Finally, I'll also need your \*\*date of bi

Yes No

View response Edit validation

And then

10/30/2022

Confirm your PIN or Password.

Oct 30, 2022

Yes No

Yes

6 is Defined

5 is Yes, I'd like ...

11 Thanks! Does the following information look correct? If so, I will proceed with creating...

Confirmation

Continue to next step

6 is not Defined

5 is No, my ema ...

Thanks! Does the following information look correct? If so, I will proceed with creating your account.

- Name: 3. Thanks! Now, enter your \*\*last name.\*
- 2. First, please provide your \*\*first name
- Email Address: 4. Awesome. I'll also need an email addr
- Aadhar No.: 8. Enter your AADHAR Number
- Phone Number: 6. Okay, please enter your \*\*phone\*\* \*\*r
- Birthday: 9. Finally, I'll also need your \*\*date of bi

Thanks! Does the following information look correct? If so, I will proceed with creating your account.

- Name: jacob, john
- Email Address: john@gmail.com
- Aadhar No.: 999999999999
- Phone Number: 0000099999
- Birthday: Oct 30, 2022

Yes No

12

email. Does the following information look correct? If so, I will proceed with creating...

Confirmation

Continue to next step

11 is No 12 is No

13

Sorry about that. Let's try this again.

Re-ask previous step(s)

11 is Yes 12 is Yes

14

You did it! Your new account is being created and you will receive an email confirmation and OTP to your Phone number (if registered) shortly.

Go to action: End

Assistant says

You did it! Your new account is being created and you will receive an email confirmation and OTP to your Phone number (if registered) shortly.

Welcome!

Define customer response

And then

Go to another action

Preview

You did it! Your new account is being created and you will receive an email confirmation and OTP to your Phone number (if registered) shortly.

Welcome!

End recognized

Do you want to know about some other services?

Yes No

## User Login:

Customer starts with:

user account

Conversation steps

1

Please enter your Email

Regex

Continue to next step

2

Please Enter your Account Number

Number

Continue to next 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

Preview

Index recognized

How can I help you?

User account

User account

Conversation steps

1

Please enter your Email

Regex

Continue to next step

2

Please Enter your Account Number

Number

Continue to next step

Please Enter your Password (Your date of birth)

Assistant says

Please enter your Email

Assistant recognizes pattern in user's text

Edit response Edit validation

How can I help you?

User account

User account

Login existing user recognized

Please enter your Email

john@gmail.com

2

Please Enter your Account Number

Number

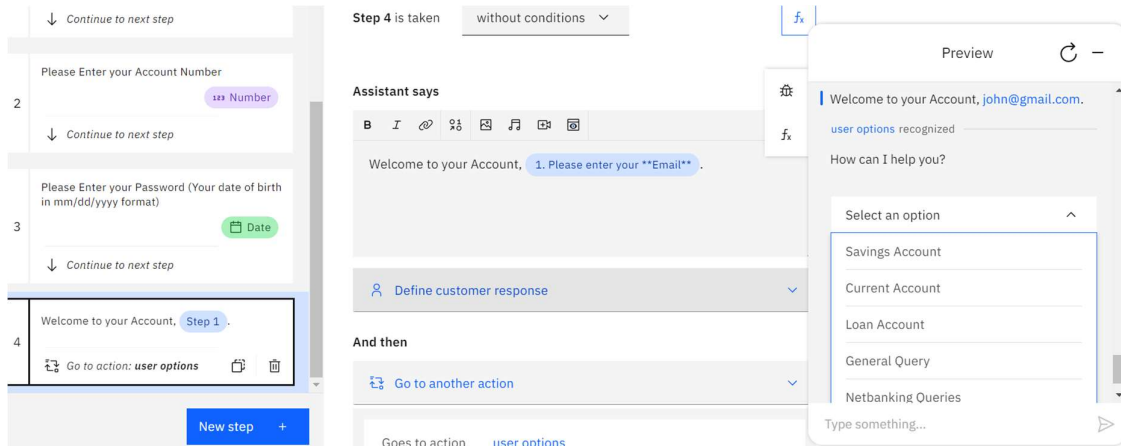
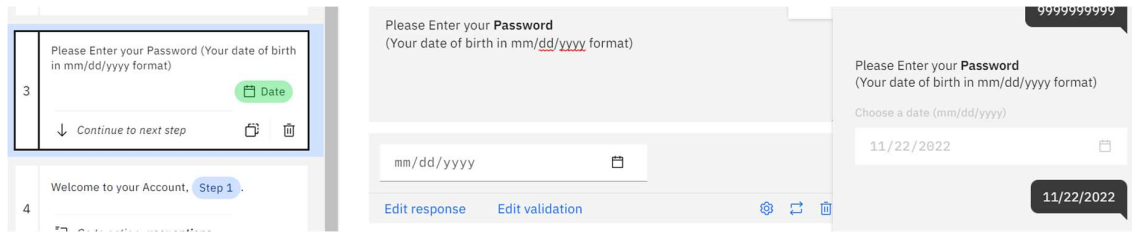
Continue to next step

Please Enter your Password (Your date of birth)

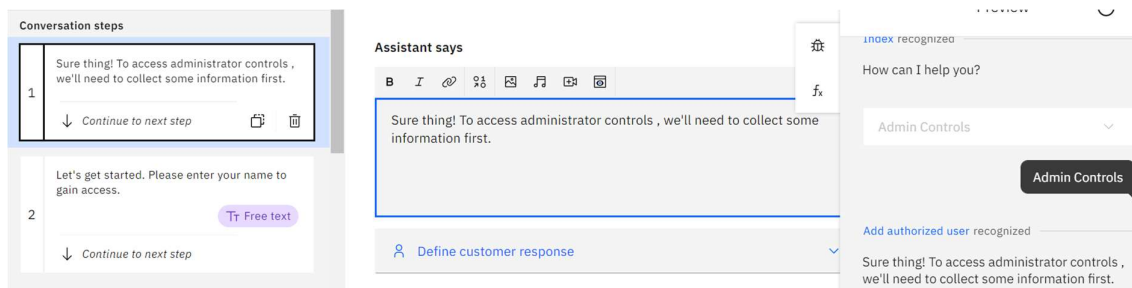
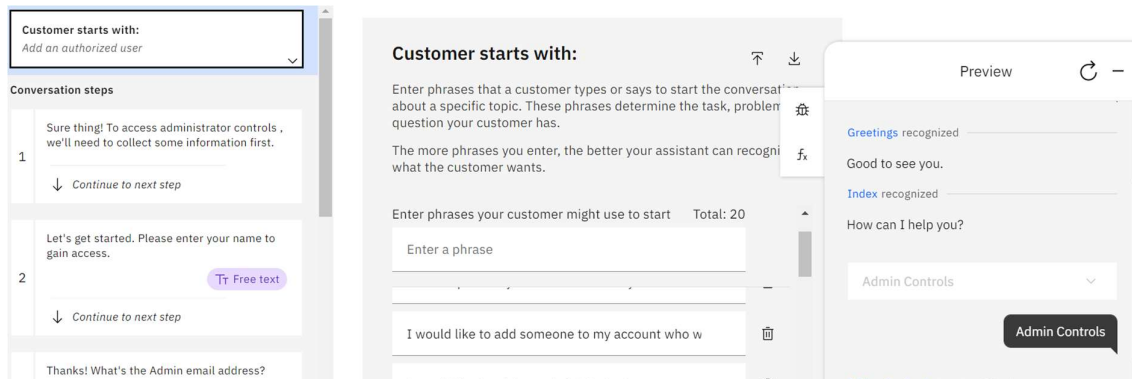
Please Enter your Account Number

john@gmail.com

999999999



## Admin Controls:



2

Let's get started. Please enter your name to gain access.

Free text

Continue to next step

3

Thanks! What's the Admin email address?

Regex

Continue to next step

Let's get started. Please enter your **name** to gain access.

User enters free text

Admin Controls

Add authorized user recognized

Sure thing! To access administrator controls , we'll need to collect some information first.

Let's get started. Please enter your **name** to gain access.

3

Thanks! What's the Admin email address?

Regex

Continue to next step

4

You can access your account now and make changes... <br /> Step 2 will receive an...

Continue to next step

What changes do you want to make ?

New step

Thanks! What's the **Admin** email address?

Assistant recognizes pattern in user's text

Admin Controls

Add authorized user recognized

Sure thing! To access administrator controls , we'll need to collect some information first.

Let's get started. Please enter your **name** to gain access.

johnn

Thanks! What's the **Admin** email address?

Type something...

4

You can access your account now and make changes... <br /> Step 2 will receive an...

Continue to next step

5

What changes do you want to make ?

Free text

Continue to next step

You can access your account now and make changes...

2. Let's get started. Please enter your **\*\*** will receive an confirmation email to 3. Thanks! What's the **\*\*Admin\*\* \*\*email** shortly.

Define customer response

And then

Continue to next step

johnn

Thanks! What's the **Admin** email address?

johnadmin@gmail.com

You can access your account now and make changes...

john will receive an confirmation email to johnadmin@gmail.com shortly.

5

What changes do you want to make ?

Free text

Continue to next step

6

The Changes will be made after the approval of the Manager. Thank you.

Go to action: End

New step

You can access your account now and make changes...

john will receive an confirmation email to johnadmin@gmail.com shortly.

What changes do you want to make ?

User enters free text

I would like to update the terms and conditions for account creation.

And then

Continue to next step

Type something...

6

The Changes will be made after the approval of the Manager. Thank you.

Go to action: End

And then

Go to another action

The Changes will be made after the approval of the Manager. Thank you.

End recognized