

PROJECT DEVELOPMENT PHASE
AI BASED DISCOURSE FOR BANKING INDUSTRY
TEAM ID: PNT2022TMID06855

SPRINT 2 :

SKILLS CREATION :

- Account Creation
- Loan Related Queries
- General Banking Queries
- Net Banking Queries

ACCOUNT CREATION :

The screenshot displays the IBM Watson Assistant interface in a web browser. The browser's address bar shows the URL: `us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F0cd42653c542475797a2`. The page header includes the IBM logo, navigation links for 'cXFdJI4tuYwnuffHMIhe', 'Inbox (9) - jeevithake...', 'IBM Watson Service P...', 'IBM Watson Assistant', and '(7) Whats...'. Below the header, there's a navigation bar with 'IBM Watson Assistant Lite', an 'Upgrade' button, and a 'Banking bot' dropdown menu.

The main content area is divided into two panels. The left panel, titled 'Current', shows a conversation flow for 'Want to open an current account'. It includes a 'Conversation steps' section with three steps:

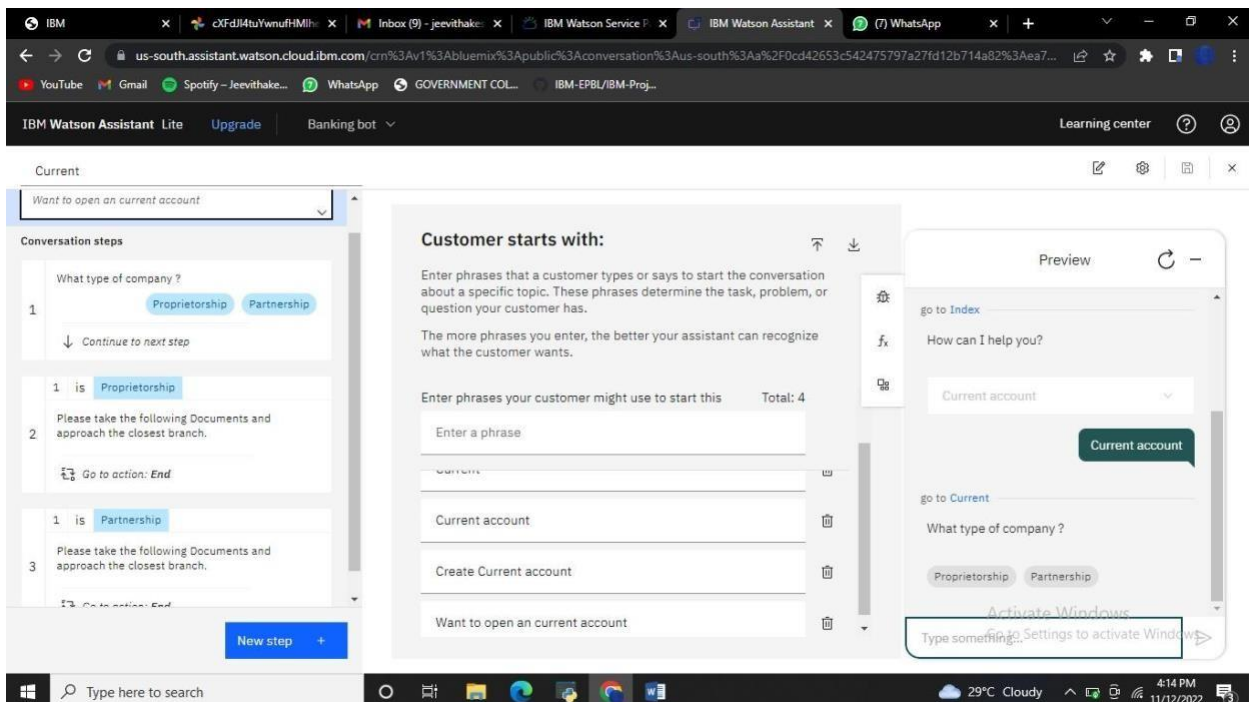
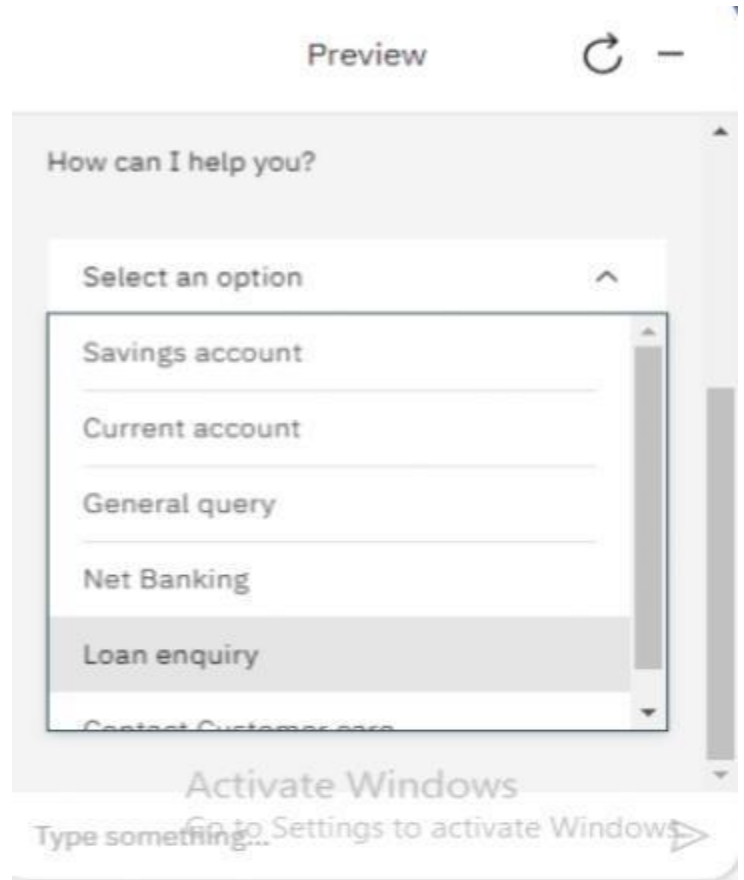
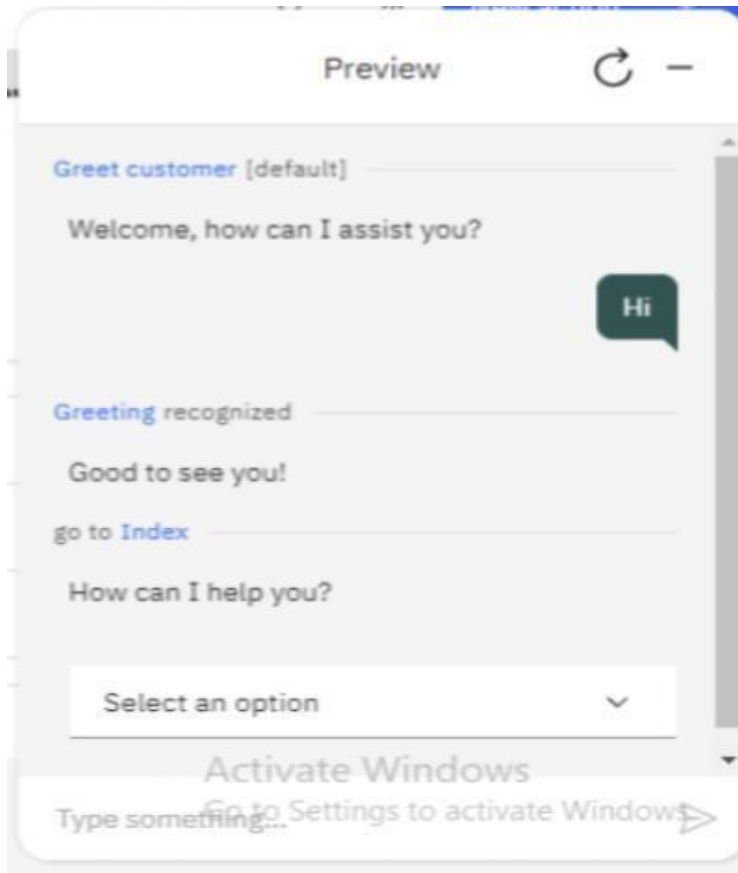
- Step 1: 'What type of company ?' with buttons for 'Proprietorship' and 'Partnership'. Below the buttons is a 'Continue to next step' button.
- Step 2: '1 is Proprietorship'. Below this, it says 'Please take the following Documents and approach the closest branch.' and 'Go to action: End'.
- Step 3: '1 is Partnership'. Below this, it says 'Please take the following Documents and approach the closest branch.' and 'Go to action: End'.

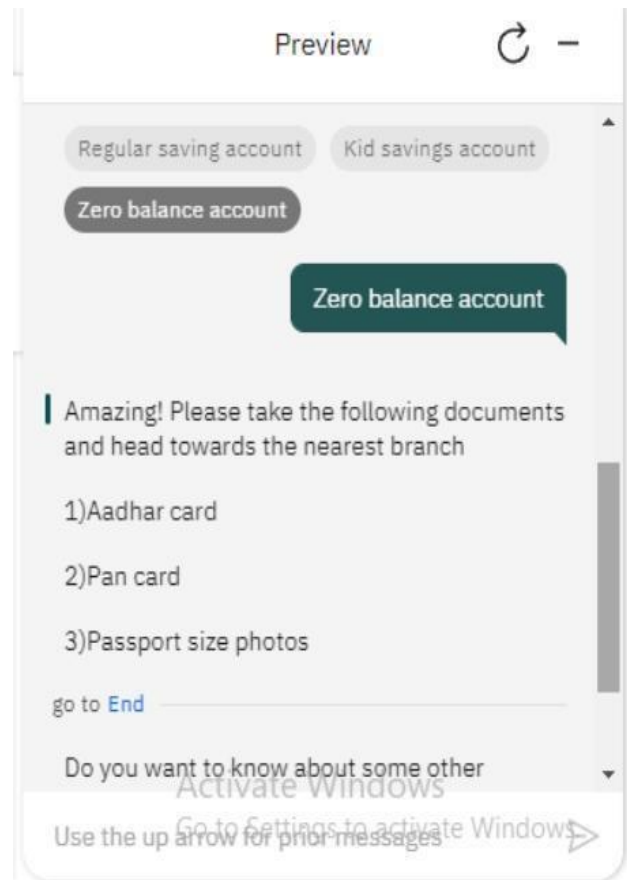
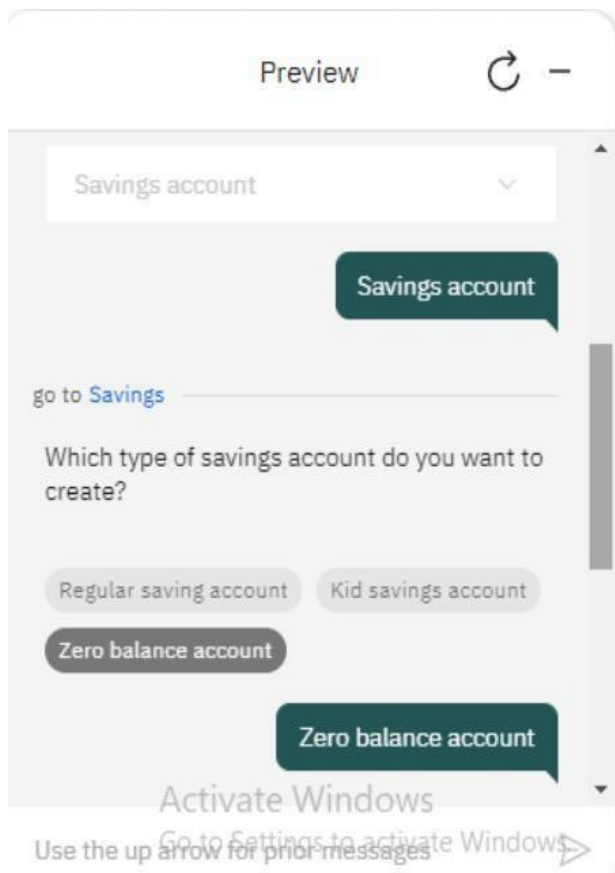
At the bottom of the left panel is a 'New step +' button. The right panel, titled 'Customer starts with:', provides instructions on how to create phrases for the assistant. It states: 'Enter phrases that a customer types or says to start the conversation about a specific topic. These phrases determine the task, problem, or question your customer has. The more phrases you enter, the better your assistant can recognize what the customer wants.'

Below the instructions, there's a section 'Enter phrases your customer might use to start this' with a 'Total: 4' count. It lists four phrases in a list box:

- Enter a phrase
- Current
- Current account
- Create Current account

At the bottom of the list box is the phrase 'Want to open an current account'. Each phrase has a trash icon to its right. The interface is running on a Windows operating system, as indicated by the taskbar at the bottom.





NET BANKING QUERIES :

IBM Watson Assistant Lite Upgrade Banking bot Learning center

Net banking

Go to action: End

3 is How do I register for Netbanking?

5 Please download and fill up the net banking request form and submit it to your home...

Go to action: End

3 is What are the features of Netbanking?

6 1) Check the account statement online.

Go to action: End

3 is Facing errors in Net Banking

7 Please contact our customer care executive or approach the closest branch.

Go to action: End

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 Total: 7

Enter a phrase

Help me out in netbanking

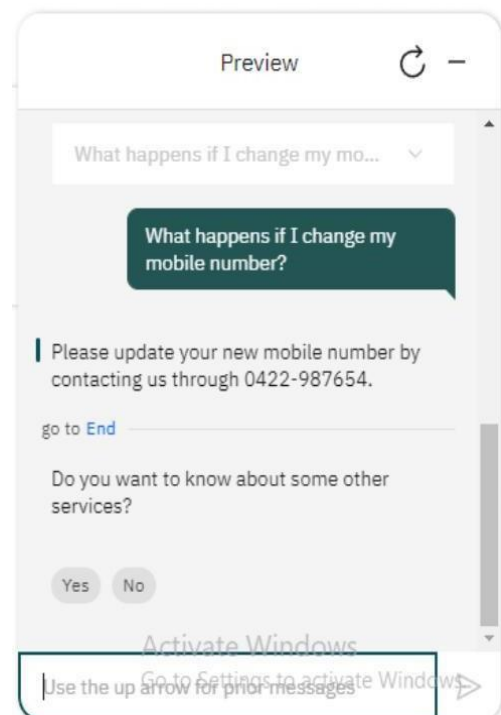
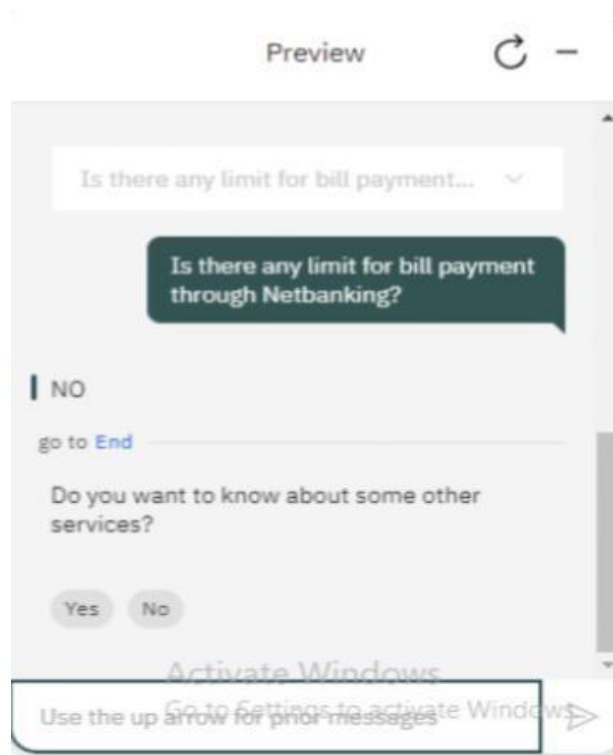
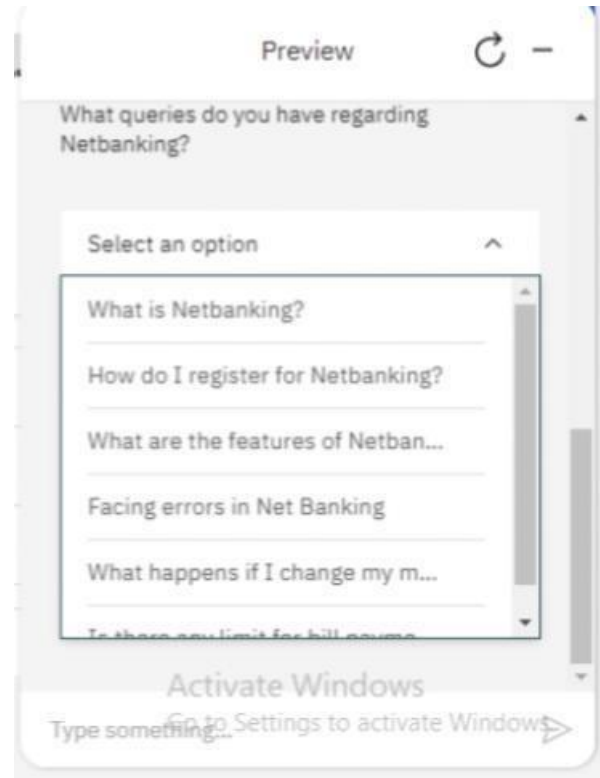
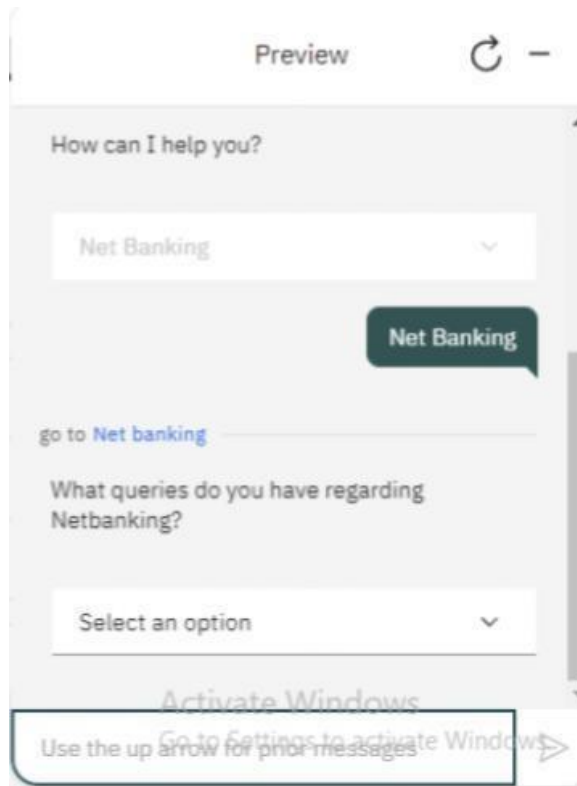
Issues in netbanking

Procedure to net banking

Preview

Type here to search

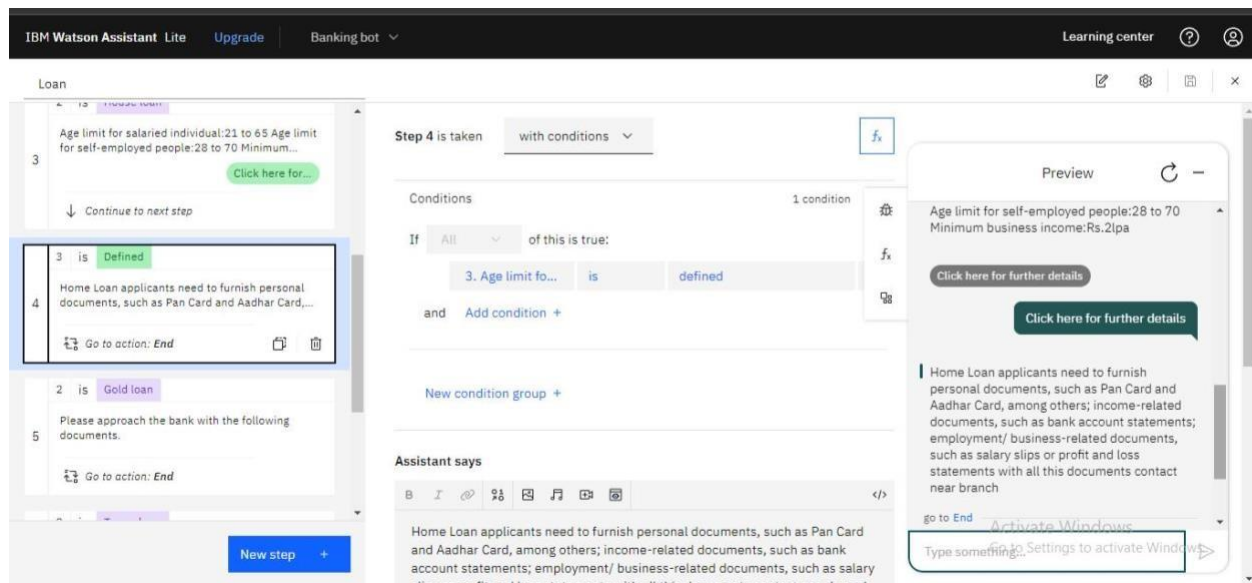
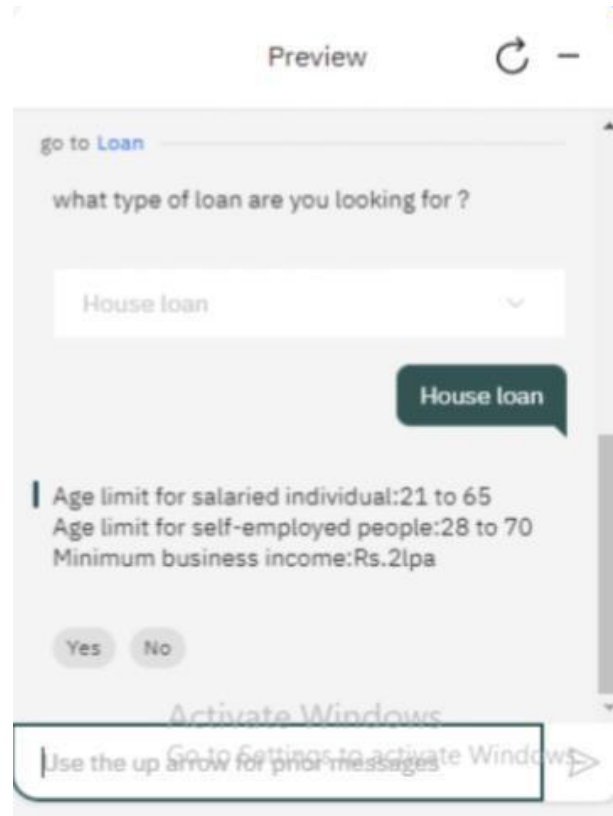
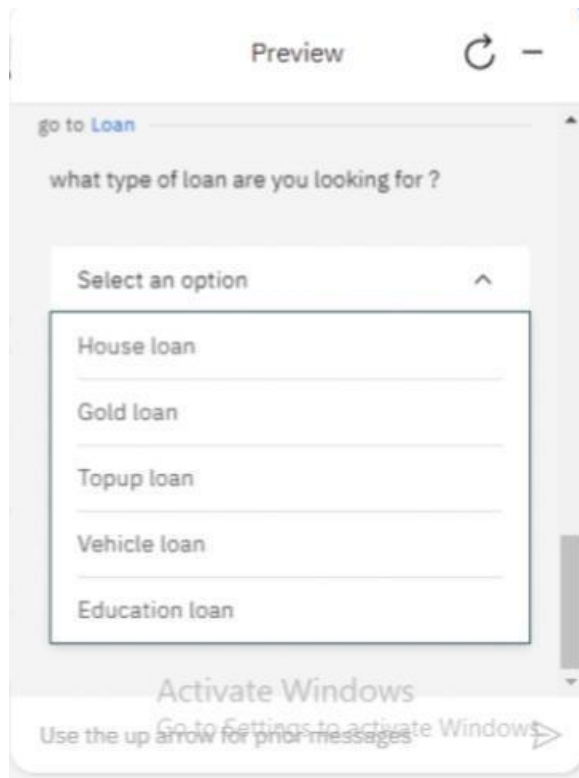
Rain coming 12:06 PM 11/11/2022



LOAN RELATED QUERIES :

The screenshot displays the IBM Watson Assistant interface in a web browser. The browser's address bar shows the URL: `us-south.assistant.watson.cloud.ibm.com/cm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F0cd42653c542475797a27fd12b714a82%3Aea7...`. The interface includes a top navigation bar with tabs for 'IBM Watson Assistant Lite', 'Upgrade', 'Banking bot', and 'Learning center'. The main content area is titled 'Loan' and features a 'Customer starts with:' section. This section contains a list of phrases that a customer might use to start a conversation, such as 'Enter phrases your customer might use to start this action', 'Loan processing', 'Doubts about Loan terminologies', and 'I want to apply for a loan'. A 'Preview' button is visible at the bottom right of the main content area. The left sidebar shows 'Conversation steps' with a list of steps: 1. 'Please approach the bank with the following documents.', 2. 'what type of loan are you looking for?', and 3. 'To be eligible for a house loan please contact our bank service with all existing loan details.' The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 11:55 AM on 11/11/2022.

This screenshot shows the same IBM Watson Assistant interface as the first one, but with a different set of phrases in the 'Customer starts with:' section. The phrases listed are 'Enter phrases your customer might use to start this action', 'How can I apply loan?', 'About loan', and 'Loan'. The 'Conversation steps' on the left sidebar remain the same. The 'Preview' button is still present at the bottom right. The browser's address bar and the top navigation bar are identical to the first screenshot. The Windows taskbar at the bottom also shows the same system clock and application icons.



GENERAL QUERIES :

IBM Watson Assistant LiteUpgradeBanking bot

Learning center

General Queries

Go to action: End

1 is Storage Locker Facility

ADYAR, ADYAR GANDHI NAGAR, AKKARAI, ALWARPET, ANNANAGAR,VASANATHAM COLONY...

Go to action: End

1 is Currency Conversion Facility

All our bank branches have a forex Exchange facility. For further details contact this number

Go to action: End

1 is CIBIL

CIBIL uses to set your credit score. CIBIL score, therefore, reflects the extent of the probability of...

6

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 thisTotal: 5

Enter a phrase

ordinary queries

bank working days

about bank working days

Activate Windows
Go to Settings to activate Windows.
Preview

IBM Watson Assistant LiteUpgradeBanking bot

Learning center

General Queries

Customer starts with:
about bank working days

Conversation steps

Select the general queries listed below

1 Currency Con... Find a neares... + 4

Continue to next step

1 is Bank Working Days

The bank is open all days from Monday to Sunday from 9 am to 3 pm, with exception of 2 nd...

Go to action: End

1 is List of Branches

CHENNAI, COIMBATORE, SALEM, ERODE, TRICHY, VELLORE, RAMANATHAPURAM, KANCHIPURAM,...

3

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 thisTotal: 5

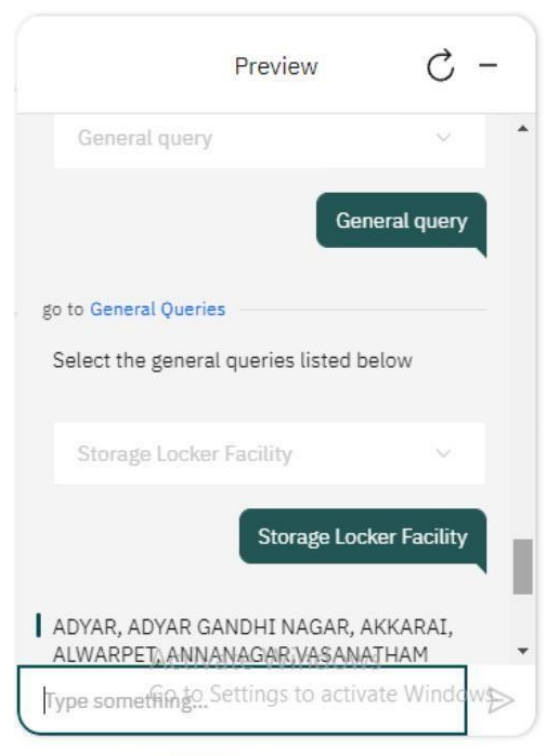
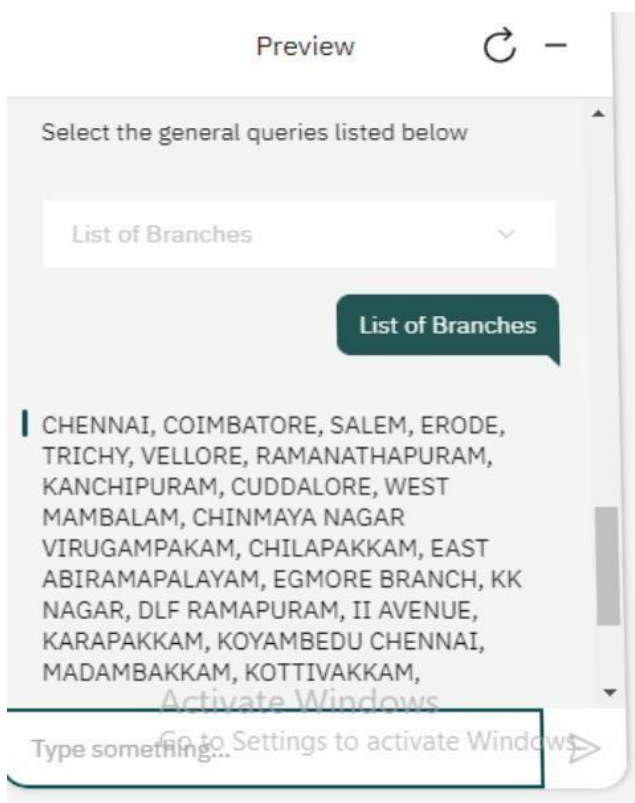
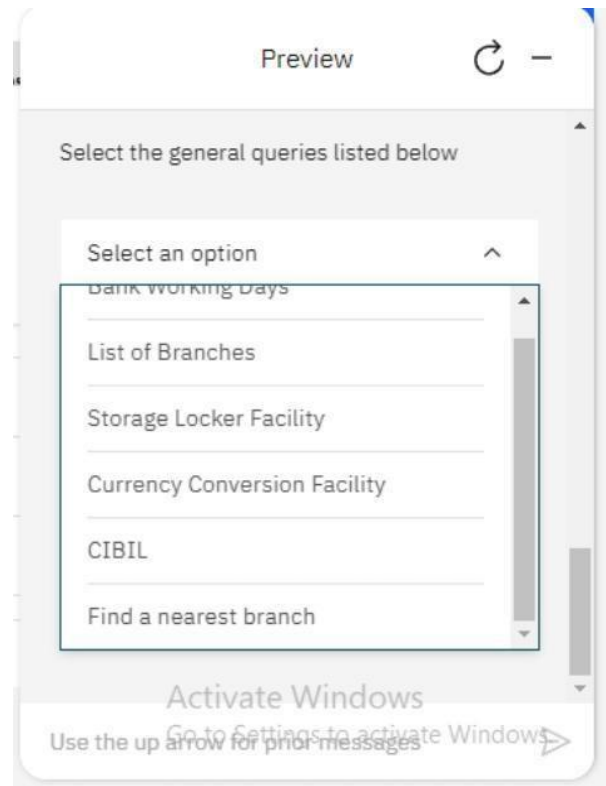
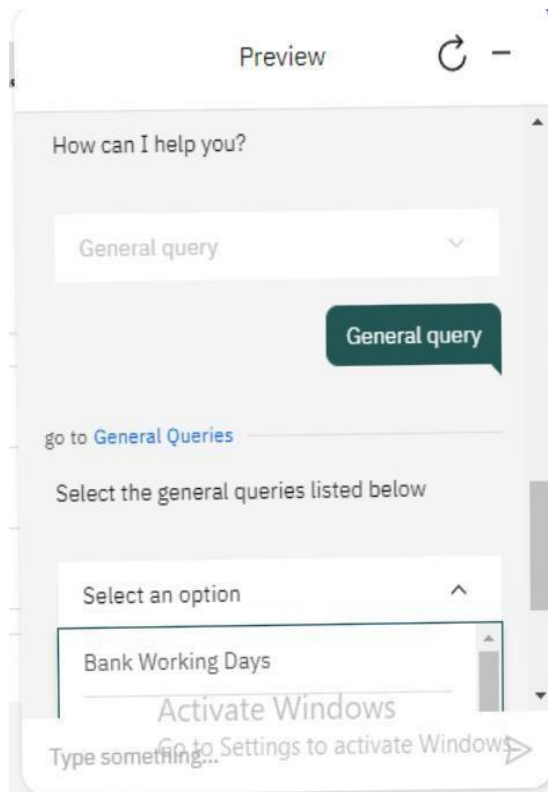
Enter a phrase

Queries related to banking

ordinary queries

bank working days

Activate Windows
Go to Settings to activate Windows.
Preview



IBM Watson Assistant LiteUpgradeBanking bot

Learning center

Actions

Actions

- Created by you
- Set by assistant

Variables

- Created by you
- Set by assistant
- Set by integration

Saved responses

Name	Last edited	Examples
Current	9 hours ago	4
General Queries	9 hours ago	5
Savings	11 hours ago	16
End greeting	10 hours ago	6
Greeting	11 hours ago	5
Index	10 hours ago	1

Items per page: 50Showing 1–9 of 9 actions

Preview

How can I help you?

Contact Customer care

Contact Customer care

May I know your location details ?

CoimbatoreChennaiSalem

Chennai

The best way to contact us in CHENNAI is by calling 0421-6764670.

Use the up arrow for prior messages

IBM Watson Assistant LiteUpgradeBanking bot

Learning center

Actions

Actions

- Created by you
- Set by assistant

Variables

- Created by you
- Set by assistant
- Set by integration

Saved responses

Name	Last edited	Examples
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Index	10 hours ago	1

Items per page: 50Showing 1–9 of 9 actions

Preview

CoimbatoreChennaiSalem

Chennai

The best way to contact us in CHENNAI is by calling 0421-6764670.

go to End

Do you want to know about some other services?

YesNo

Yes

Activate Windows

Type something...