

Project Development Phase

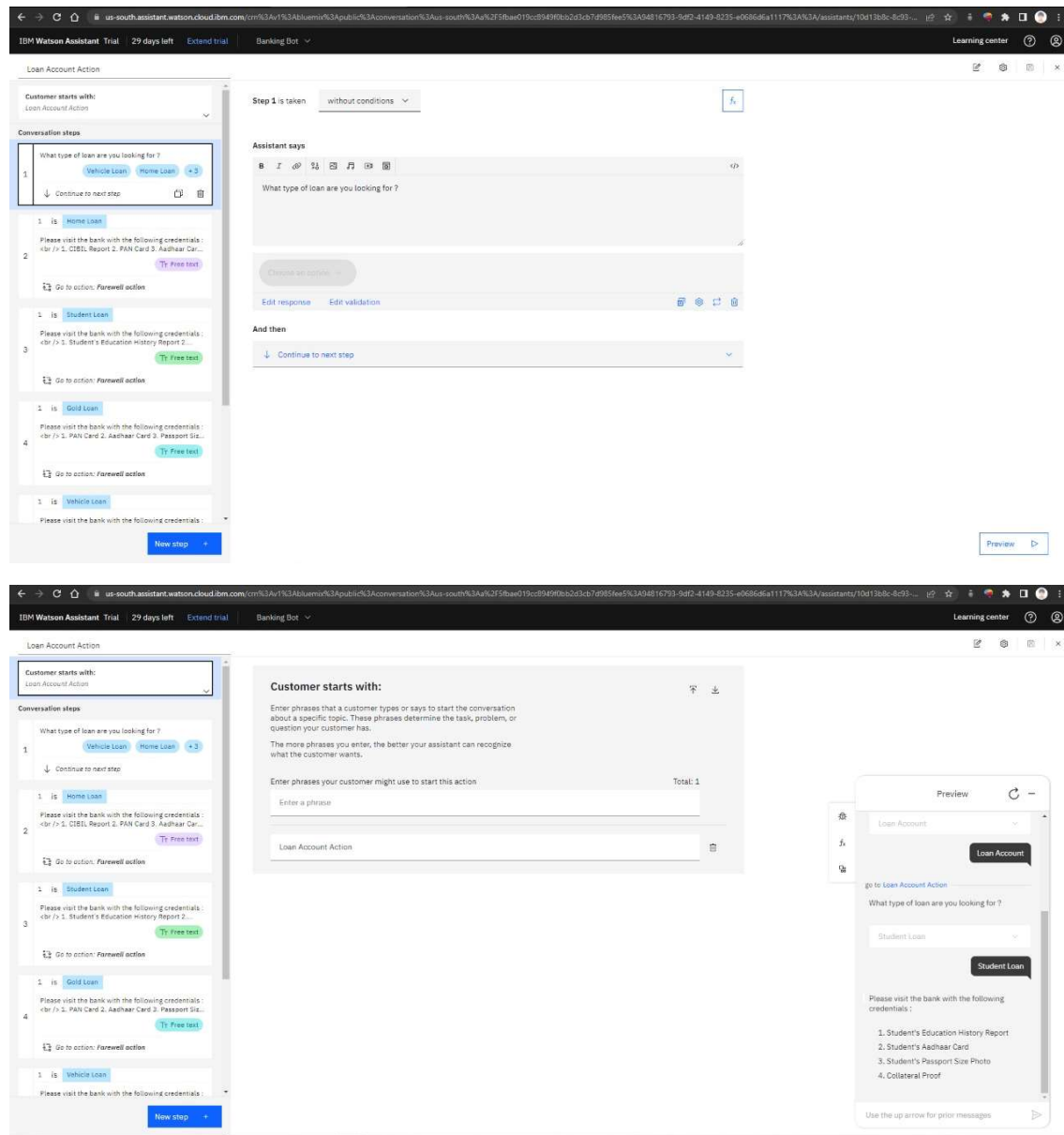
Sprint 2

Date	5 November 2022
Team ID	PNT2022TMID15597
Project Name	AI based discourse for Banking Industry

Screenshots of Sprint - 2 tasks :

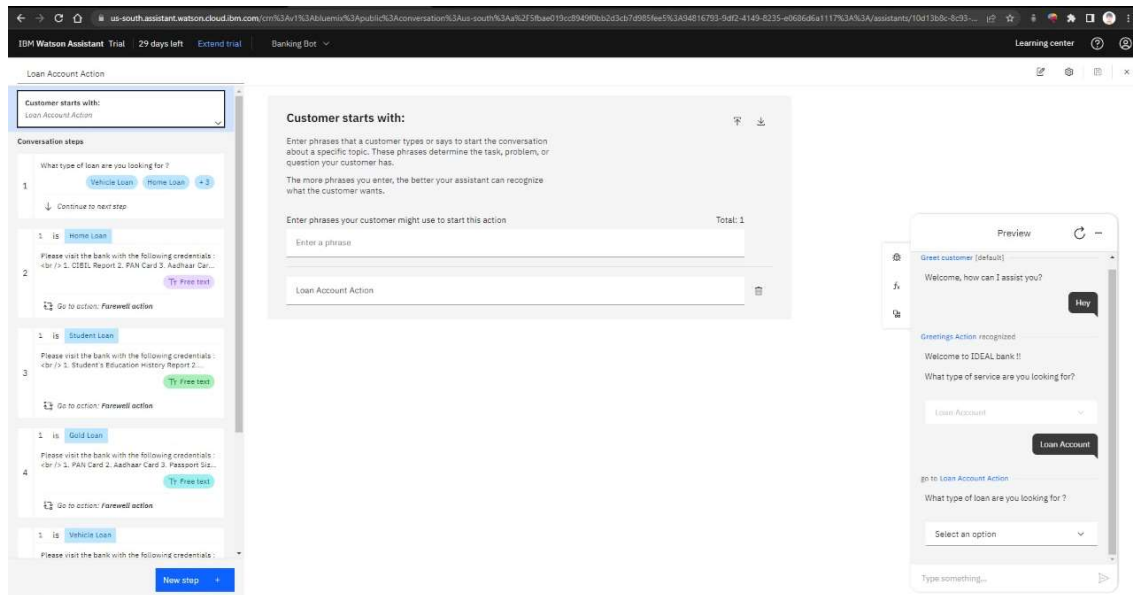
Task 1

Creating Loan Account Actions:



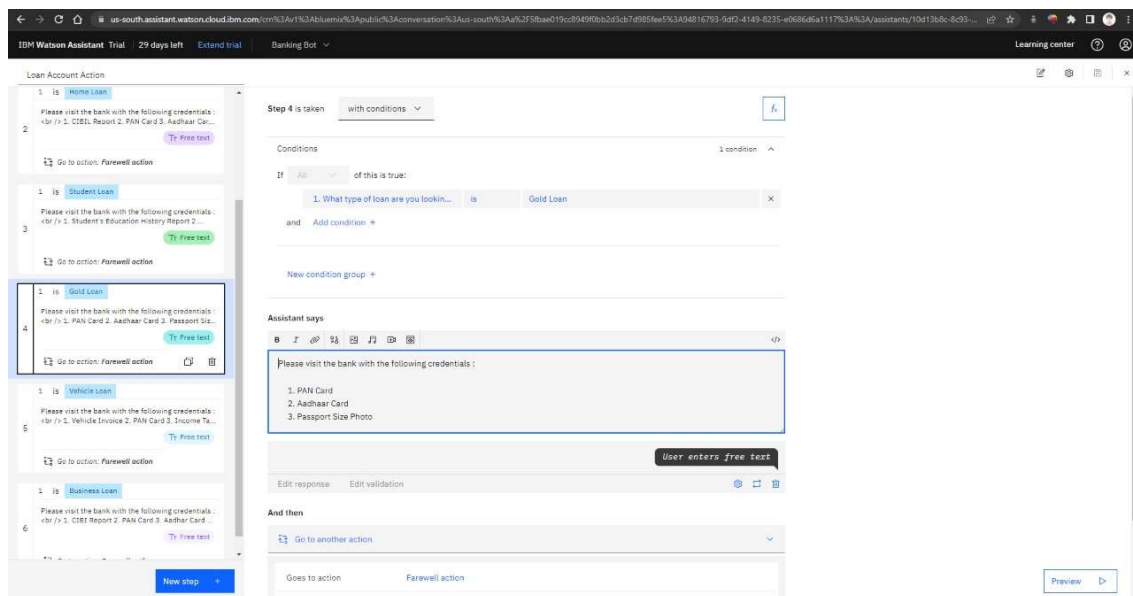
The screenshot displays the IBM Watson Assistant interface for configuring a 'Loan Account Action'. The interface is divided into several sections:

- Conversation steps:** A list of steps defining the conversation flow. Step 1 asks 'What type of loan are you looking for?' with options 'Vehicle Loan' and 'Home Loan'. Subsequent steps (2, 3, 4) provide instructions for visiting the bank with specific credentials, each followed by a 'Free text' input field.
- Step 1 is taken:** A section showing the initial state of the action, indicating it is taken 'without conditions'.
- Assistant says:** A section for defining the assistant's response, currently showing 'What type of loan are you looking for?'.
- Preview:** A panel on the right showing a simulated chat interface. It displays the 'Loan Account' action selected, the conversation steps, and the 'Free text' input fields.



Providing the information about the credentials to be submitted:

1) For Gold Loan



2) For Business Loan

The screenshot shows the IBM Watson Assistant interface for a Business Loan flow. On the left, a 'Loan Account Action' sidebar lists steps 1 through 6. Step 6, 'Business Loan', is highlighted. The main workspace shows 'Step 6 is taken' with a 'with conditions' dropdown. The conditions section displays a single condition: '1. What type of loan are you looking... is Business Loan'. Below this, the 'Assistant says' section contains a text box with the message: 'Please visit the bank with the following credentials : 1. CIBIL Report 2. PAN Card 3. Aadhar Card 4. Passport Size Photo'. A 'User enters free text' bubble is shown below the text box. The 'And then' section shows a 'Go to another action' dropdown menu. At the bottom, a 'Preview' button is visible.

3) For Vehicle Loan

The screenshot shows the IBM Watson Assistant interface for a Vehicle Loan flow. On the left, a 'Loan Account Action' sidebar lists steps 1 through 6. Step 5, 'Vehicle Loan', is highlighted. The main workspace shows 'Step 5 is taken' with a 'with conditions' dropdown. The conditions section displays a single condition: '1. What type of loan are you looking... is Vehicle Loan'. Below this, the 'Assistant says' section contains a text box with the message: 'Please visit the bank with the following credentials : 1. Vehicle Invoice 2. PAN Card 3. Income Tax returns for the past 3 years'. A 'User enters free text' bubble is shown below the text box. The 'And then' section shows a 'Go to another action' dropdown menu. At the bottom, a 'Preview' button is visible.

4) For Home Loan

The screenshot shows the IBM Watson Assistant interface for configuring a 'Loan Account Action'. The left sidebar displays a list of conversation steps. Step 2 is highlighted, showing a condition '1. What type of loan are you looking for...' with a value of 'Home Loan'. The main panel shows the configuration for Step 2, which is taken 'with conditions'. The conditions section shows a single condition: '1. What type of loan are you looking for...' is 'Home Loan'. The assistant's response is a text block: 'Please visit the bank with the following credentials: 1. CIBIL Report 2. PAN Card 3. Aadhaar Card 4. Passport Size Photo'. The 'And then' section shows a 'Go to another action' dropdown.

5) For Student Loan

The screenshot shows the IBM Watson Assistant interface for configuring a 'Loan Account Action'. The left sidebar displays a list of conversation steps. Step 3 is highlighted, showing a condition '1. What type of loan are you looking for...' with a value of 'Student Loan'. The main panel shows the configuration for Step 3, which is taken 'with conditions'. The conditions section shows a single condition: '1. What type of loan are you looking for...' is 'Student Loan'. The assistant's response is a text block: 'Please visit the bank with the following credentials: 1. Student's Education History Report 2. Student's Aadhaar Card 3. Student's Passport Size Photo 4. Collateral Proof'. The 'And then' section shows a 'Go to another action' dropdown.

Task 2

Information about some general queries

The screenshot shows the IBM Watson Assistant interface for a "General Query Action". The left sidebar displays the "Conversation steps" for the action, which are:

- Step 1: "Select a General Query listed below:" with buttons for "Bank Working Days" and "List of Branches". Below the buttons is a "Continue to next step" button.
- Step 2: "The Bank is open from Monday to Saturday from 8 AM to 2 PM, except for second Saturdays." with a "Free text" input field and a "Go to action: Farewell action" button.
- Step 3: "The List of Branches are:
 - ADYAR - ANNA NAGAR - ASHOK NAGAR - KOYAMBEDU ..." with a "Free text" input field and a "Go to action: Farewell action" button.

The main area shows the "Assistant says" section, which contains the text "Select a General Query listed below:". Below this text are the buttons "Bank Working Days" and "List of Branches". The "And then" section shows a "Continue to next step" button.

List of Available Branches:

The screenshot shows the IBM Watson Assistant interface for a "General Query Action". The left sidebar displays the "Conversation steps" for the action, which are:

- Step 1: "Select a General Query listed below:" with buttons for "Bank Working Days" and "List of Branches". Below the buttons is a "Continue to next step" button.
- Step 2: "The Bank is open from Monday to Saturday from 8 AM to 2 PM, except for second Saturdays." with a "Free text" input field and a "Go to action: Farewell action" button.
- Step 3: "The List of Branches are:
 - ADYAR - ANNA NAGAR - ASHOK NAGAR - KOYAMBEDU ..." with a "Free text" input field and a "Go to action: Farewell action" button.

The main area shows the "Assistant says" section, which contains the text "The List of Branches are," followed by a list of branches: ADYAR, ANNA NAGAR, ASHOK NAGAR, KOYAMBEDU, THIRUMANGALAM, and KOLATHUR. Below this text is a "User enters free text" input field. The "And then" section shows a "Go to another action" button.

General Query Action

Customer starts with: General Query Action

Conversation steps

- Select a General Query listed below:
 - Bank Working
 - List of Branch
- Continue to next step
- Bank Working Days
 - The Bank is open from Monday to Saturday from 8 AM to 2 PM, except for second Saturdays.
- List of Branches
 - The List of Branches are:
 - ADVAR - ANNA NAGAR - ASHOK NAGAR - KOYAMBEDU - ...

Step 3 is taken with conditions

Conditions

If All of this is true:

1. Select a General Query listed below is List of Branches

Assistant says

The List of Branches are,

- ADVAR
- ANNA NAGAR
- ASHOK NAGAR
- KOYAMBEDU
- THIRUMANGALAM
- KOLATHUR

Preview

Greetings Action recognised

Welcome to IDEAL bank !!

What type of service are you looking for?

General Query

go to General Query Action

Select a General Query listed below :

Bank Working Days List of Branches

Bank Working Days

The Bank is open from Monday to Saturday from 8 AM to 2 PM, except for second Saturdays.

Type something...

Information about the working days and hours of the bank

General Query Action

Customer starts with: General Query Action

Conversation steps

- Select a General Query listed below:
 - Bank Working
 - List of Branch
- Continue to next step
- Bank Working Days
 - The Bank is open from Monday to Saturday from 8 AM to 2 PM, except for second Saturdays.
- List of Branches
 - The List of Branches are:
 - ADVAR - ANNA NAGAR - ASHOK NAGAR - KOYAMBEDU - ...

Step 2 is taken with conditions

Conditions

If All of this is true:

1. Select a General Query listed below is Bank Working Days

Assistant says

The Bank is open from Monday to Saturday from 8 AM to 2 PM, except for second Saturdays.

Preview

Greetings Action recognised

Welcome to IDEAL bank !!

What type of service are you looking for?

General Query

go to General Query Action

Select a General Query listed below :

Bank Working Days List of Branches

Bank Working Days

The Bank is open from Monday to Saturday from 8 AM to 2 PM, except for second Saturdays.

Type something...

Task 3

Basic queries regarding Net Banking

The screenshot shows the IBM Watson Assistant interface for configuring a Net Banking action. The left sidebar displays the conversation steps, with Step 1 highlighted. The main area shows the configuration for Step 1, which is taken without conditions. The assistant's response is a text block that says "Select the Net Banking queries listed below:". Below this, there are four buttons: "What is Net Banking?", "How do I register for Net Banking?", "What are the features of Net Banking?", and "Facing errors in Net Banking?". The "Go to action" dropdown is set to "Farwell action".

The screenshot shows the IBM Watson Assistant interface for configuring Step 2 of the Net Banking action. The left sidebar displays the conversation steps, with Step 2 highlighted. The main area shows the configuration for Step 2, which is taken with conditions. The conditions are set to "If 1. Select the Net Banking queries listed below is What is Net Banking?". The assistant's response is a text block that says "The facility offered by the bank allows customers to use banking services over the Internet. Customers need not visit their banks branch office to avail each and every small service." Below this, there is a "User enters free text" input field. The "Go to action" dropdown is set to "Farwell action".

Adding the features of the Net Banking

The screenshot shows the IBM Watson Assistant interface for a 'Net Banking Action'. The left sidebar displays a list of steps, with step 4, 'What are the features of Net Banking?', selected. The main panel shows the configuration for this step. The 'Conditions' section is set to 'with conditions' and includes a condition: '1. Select the Net Banking queries L...' is 'What are the features of Net Banking?'. The 'Assistant says' section contains a list of features: 'Able to check the account statement online', 'Able to open a Fixed Deposit account', 'Able to Transfer Funds', 'Able to buy General Insurance', and 'Able to make Merchant Payments'. The 'And then' section is set to 'Go to another action'.

In case of any errors in the Net banking

The screenshot shows the IBM Watson Assistant interface for a 'Net Banking Action'. The left sidebar displays a list of steps, with step 5, 'Facing errors in Net Banking?', selected. The main panel shows the configuration for this step. The 'Conditions' section is set to 'with conditions' and includes a condition: '1. Select the Net Banking queries L...' is 'Facing errors in Net Banking?'. The 'Assistant says' section contains the text: 'Please contact our Customer care executive or Approach the nearest branch.' The 'And then' section is set to 'Go to another action'.

us-south.assistant.watsoncloud.ibm.com/cn/3A/133Ablumv63Apublic3Aconversation3AAs-south3Aa62f3ba070c8949f0b2d3cb7d95fe53A94816793-5d2-4149-8235-e086da111763A3A/assistant/10d13bc-8c93-... IBM Watson Assistant Trial 29 days left Extend trial Banking Bot Learning center

Net Banking Action

Select the Net Banking queries listed below :

- 1 How do I reg... What are the... +2

Continue to next step

- 1 is What is Net Banking ?
The facility offered by the bank allows customers to use banking services over the Internet. Customers...
- 2
Tr Free text
- Go to action: Farewell action
- 1 is How do I register for Net Banking ?
Please download and fill up the Net Banking registration form and submit it to your Home Branch.
- 3
Tr Free text
- Go to action: Farewell action
- 1 is What are the features of Net Banking ?
The Features of Net Banking are - Able to check the account statement online - Able to open a File...
- 4
Tr Free text
- Go to action: Farewell action
- 1 is Facing errors in Net Banking ?
Please contact our Customer care executive or Approach the nearest branch.
- 5
Tr Free text
- Go to action: Farewell action

New step +

Step 5 is taken with conditions

Conditions

If All of this is true:

1. Select the Net Banking queries L... is Facing errors in Net Banking ?

and Add condition +

New condition group +

Assistant says

Please contact our Customer care executive or Approach the nearest branch.

User enters free text

And then

Go to another action

Goes to action: Farewell action

Pass values

Preview

Net Banking

go to Net Banking Action

Select the Net Banking queries listed below :

What is Net Banking ?

How do I register for Net Banking ?

What are the features of Net Banking ?

Facing errors in Net Banking ?

What is Net Banking ?

The facility offered by the bank allows customers to use banking services over the Internet. Customers need not visit their banks branch office to avail each and every small service.

Type something...

us-south.assistant.watsoncloud.ibm.com/cn/3A/133Ablumv63Apublic3Aconversation3AAs-south3Aa62f3ba070c8949f0b2d3cb7d95fe53A94816793-5d2-4149-8235-e086da111763A3A/assistant/10d13bc-8c93-... IBM Watson Assistant Trial 29 days left Extend trial Banking Bot Learning center

Net Banking Action

Select the Net Banking queries listed below :

- 1 How do I reg... What are the... +2

Continue to next step

- 1 is What is Net Banking ?
The facility offered by the bank allows customers to use banking services over the Internet. Customers...
- 2
Tr Free text
- Go to action: Farewell action
- 1 is How do I register for Net Banking ?
Please download and fill up the Net Banking registration form and submit it to your Home Branch.
- 3
Tr Free text
- Go to action: Farewell action
- 1 is What are the features of Net Banking ?
The Features of Net Banking are - Able to check the account statement online - Able to open a File...
- 4
Tr Free text
- Go to action: Farewell action
- 1 is Facing errors in Net Banking ?
Please contact our Customer care executive or Approach the nearest branch.
- 5
Tr Free text
- Go to action: Farewell action

New step +

Step 5 is taken with conditions

Conditions

If All of this is true:

1. Select the Net Banking queries L... is Facing errors in Net Banking ?

and Add condition +

New condition group +

Assistant says

Please contact our Customer care executive or Approach the nearest branch.

User enters free text

And then

Go to another action

Goes to action: Farewell action

Pass values

Preview

Free

Greetings Action recognized

Welcome to IDEAL bank!!

What type of service are you looking for?

Net Banking

go to Net Banking Action

Select the Net Banking queries listed below :

What is Net Banking ?

How do I register for Net Banking ?

What are the features of Net Banking ?

Facing errors in Net Banking ?

Use the up arrow for prior messages

Queries regarding the registration for Net Banking

us-south.assistant.watson.cloud.ibm.com/cockpit/private/assistant/3a4e-south/3a4e2f5ba012c0b940b2a3c07d95fee5/3a4e1c793-5d2-4149-0235-e066d6a11776/3a4e3a/assistant/10d13b0c-8c93-...

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Learning center

Net Banking Action

Conversation steps

1

How do I reg...

What are the...

2

Continue to next step

1

What is Net Banking?

The facility offered by the bank allows customers to use Banking services over the Internet. Customers...

2

Free text

Go to action: Farewell action

1

How do I register for Net Banking?

Please download and fill up the Net Banking requisition form and submit it to your Home Branch.

3

Free text

Go to action: Farewell action

1

What are the features of Net Banking?

The features of Net Banking are - Able to check the account statement online - Able to open a Pass...

4

Free text

Go to action: Farewell action

1

Facing errors in Net Banking?

Please contact our Customer care executive or Approach the nearest branch.

5

Free text

Go to action: Farewell action

New step

Step 3 is taken with conditions

Conditions

If All of this is true:

1. Select the Net Banking queries L... is How do I register for Net Banking?

and Add condition +

New condition group +

Assistant says

Please download and fill up the Net Banking requisition form and submit it to your Home Branch.

User enters free text

Edit response Edit validation

And then

Go to another action

Goes to action Farewell action

Pass values

Preview