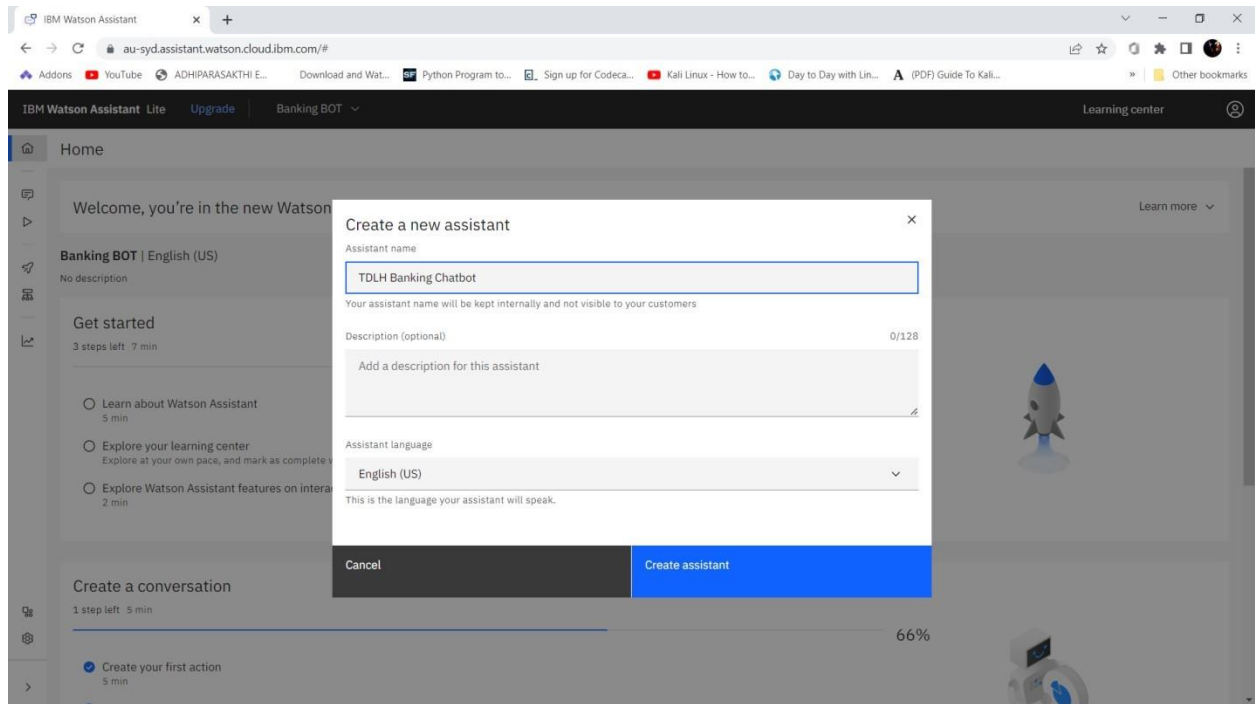


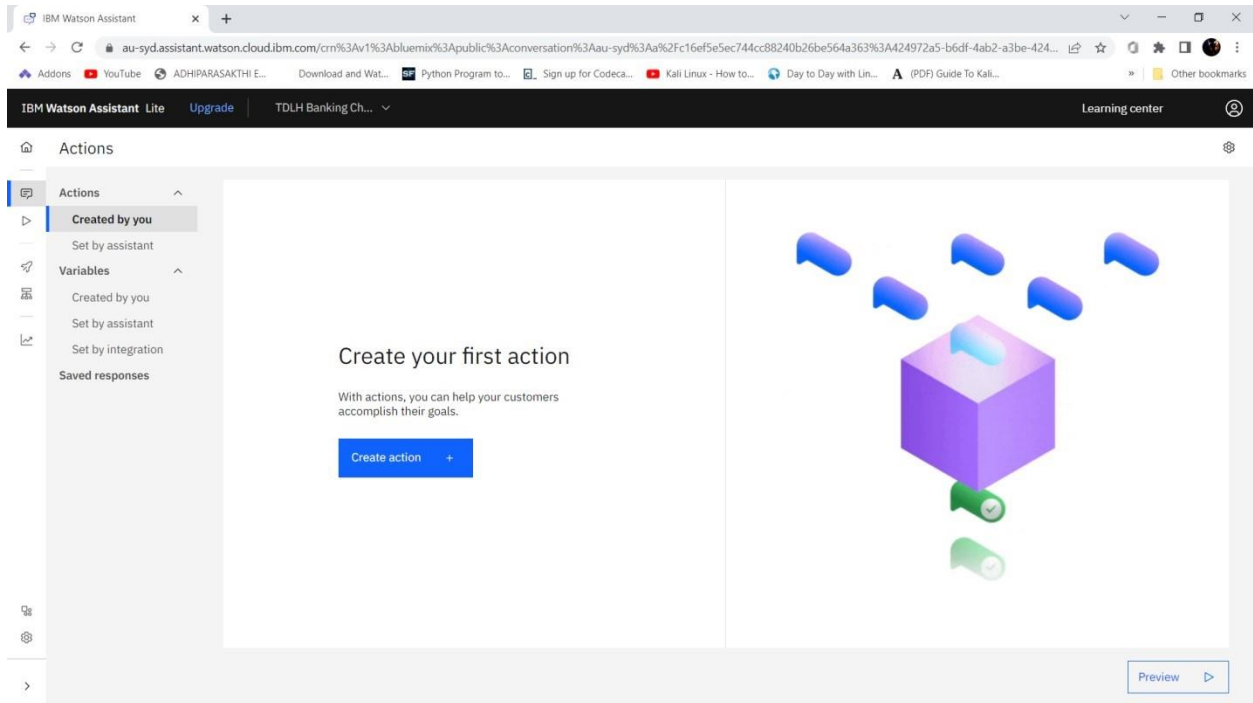
# Project Development Phase

## Delivery of Sprint - 1

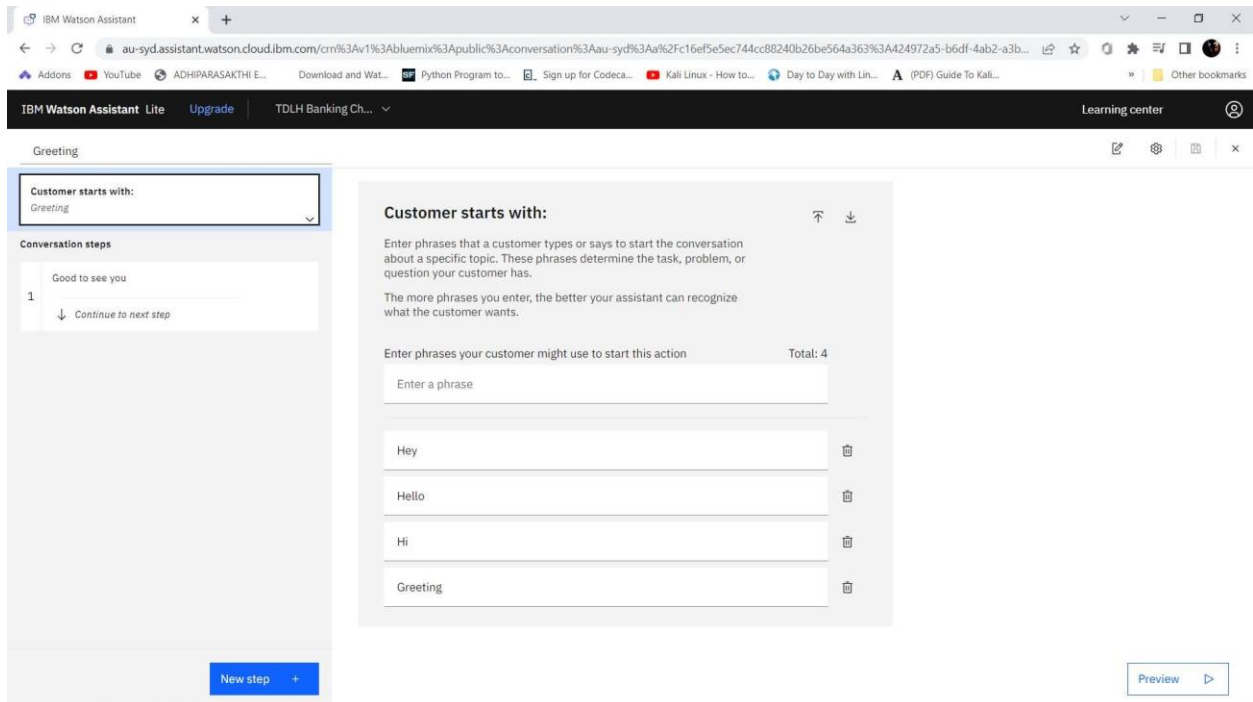
Date	26 OCT 2022
Team ID	PNT2022TMID06493
Project Name	AI-based discourse for Banking Industry

## Create IBM Service





## Greeting



IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Greeting

Customer starts with: Greeting

Conversation steps

1 Good to see you  
↓ Continue to next step

Step 1 is taken without conditions

Assistant says

Good to see you

Define customer response

And then

↓ Continue to next step

New step + Preview

## Chatbot knowledge creation

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Index

Customer starts with: Index

Conversation steps

1 How can I help you?  
Savings acco... Current acco... +3  
↓ Continue to next step

Step 1 is taken without conditions

Assistant says

How can I help you?

Choose an option

Edit response Edit validation

And then

↓ Continue to next step

New step + Preview

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aaau-syd%3Aa%2F16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-a3b...

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End

Customer starts with:  
End

Conversation steps

1 Do you want to know about some other services? Confirmation  
↓ Continue to next step

1 is No  
2 Thank you Have a nice day.  
Action complete

New step +

Step 1 is taken without conditions

Assistant says

Do you want to know about some other services?

Yes No

View response Edit validation

And then

↓ Continue to next step

Preview

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aaau-syd%3Aa%2F16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-a3b...

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End

Customer starts with:  
End

Conversation steps

1 Do you want to know about some other services? Confirmation  
↓ Continue to next step

1 is No  
2 Thank you Have a nice day.  
Action complete

New step +

Step 2 is taken with conditions

Conditions 1 condition

If All of this is true:

1. Do you want to kn... is No

and Add condition +

New condition group +

Assistant says

Thank you Have a nice day.

Define customer response

Preview

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fcf16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-a3b...

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Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

Name	Last edited	Examples Count	Status
Greeting	11 minutes ago	4	✓
Index	5 minutes ago	1	✓
End	a minute ago	1	✓

Items per page: 50 Showing 1-3 of 3 actions

1 1 of 1 pages

Preview

## Create savings account action

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fcf16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-a3b...

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Untitled action

Customer starts with:  
Example: I want to pay my credit card bill.

Conversation steps

1 This step has no content  
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 your customer wants.

New action

What does your customer say to start this interaction?

Savings account

Cancel Save

New step

Preview

IBM Watson Assistant

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Savings account

Customer starts with: Savings account

Conversation steps

1 Which type of savings account do you want to create?  
Regular savin... Kids savings ... +1  
Continue to next step

Step 1 is taken without conditions

Assistant says

Which type of savings account do you want to create?

Regular savings account Kids savings account Zero Balance savings account

Edit response Edit validation

And then

Continue to next step

New step + Preview

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fcf16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-a3b...

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Index

Customer starts with: Index

Conversation steps

1 How can I help you?  
Savings acco... Current acco... +3  
Continue to next step

2 1 is Savings account  
This step has no content  
Go to action: Savings account

Step 2 is taken with conditions

Conditions 1 condition

If All of this is true:

1. How can I help yo... is Savings account

and Add condition +

New condition group +

Assistant says

For example: What type of transfer would you like to make?

Define customer response

New step + Preview

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fc16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-a3b...

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Savings account

Customer starts with:  
Savings account

Conversation steps

1 Which type of savings account do you want to create?  
Regular savin... Kids savings ... +1  
Continue to next step

2 1 is Regular savings account  
2 Greate! Please take the following documents and head towards the nearest branch 1)Aadhar card 2)Pan Card...  
Go to action: End

Step 2 is taken with conditions

Conditions 1 condition

If All of this is true:  
1. Which type of sav... is Regular savings account  
and Add condition +  
New condition group +

Assistant says

Greate! Please take the following documents and head towards the nearest branch  
1)Aadhar card  
2)Pan Card  
3)Passport Size Photos

Define customer response

Preview

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fc16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-a3b...

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Savings account

Customer starts with:  
Savings account

Conversation steps

1 Which type of savings account do you want to create?  
Regular savin... Kids savings ... +1  
Continue to next step

2 1 is Regular savings account  
2 Greate! Please take the following documents and head towards the nearest branch 1)Aadhar card 2)Pan Card...  
Go to action: End

3 1 is Kids savings account  
3 Awesome ! Please take the following document and head towards tbe nearest branch 1)Aadhar Card 2)Pa...  
Continue to next step

If All of this is true:  
1. Which type of sav... is Kids savings account  
and Add condition +  
New condition group +

Assistant says

Awesome ! Please take the following document and head towards tbe nearest branch  
1)Aadhar Card  
2)Pan Card  
3)Passport Size Photos  
4)Gaurdians Aadhar Card

Define customer response

And then

Continue to next step

Preview

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fc16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-a3b...

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### Savings account

Conversation steps

- 1 Which type of savings account do you want to create?  
Regular savin... Kids savings ... +1  
Continue to next step
- 1 is Regular savings acco...  
Create! Please take the following documents and head towards the nearest branch 2)Aadhar card...  
Go to action: End
- 1 is Kids savings account  
Awesome ! Please take the following document and head towards the nearest branch 2)Aadhar Card...  
Go to action: End
- 1 is Zero Balance savings ...  
Amazing ! Please take the following documents and head towards the nearest branch 2)Aadhar Card...

Step 4 is taken with conditions

Conditions

1 condition

If All of this is true:

- 1. Which type of sav... is Zero Balance savings account

and Add condition +

New condition group +

Assistant says

Amazing ! Please take the following documents and head towards the nearest branch

- 1)Aadhar Card
- 2)Pan Card
- 3)Passport Size Photos

Define customer response

Preview

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fc16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-a3be-424...

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

### Index

Customer starts with: Index

Conversation steps

- 1 How can I help you?  
Savings acco... Current acco... +3  
Continue to next step
- 1 is Savings account  
This step has no content  
Go to action: Savings account

New condition group +

Assistant says

For example: What type of transfer would you like to make?

Define customer response

And then

Go to another action

Goes to action Savings account

Pass values

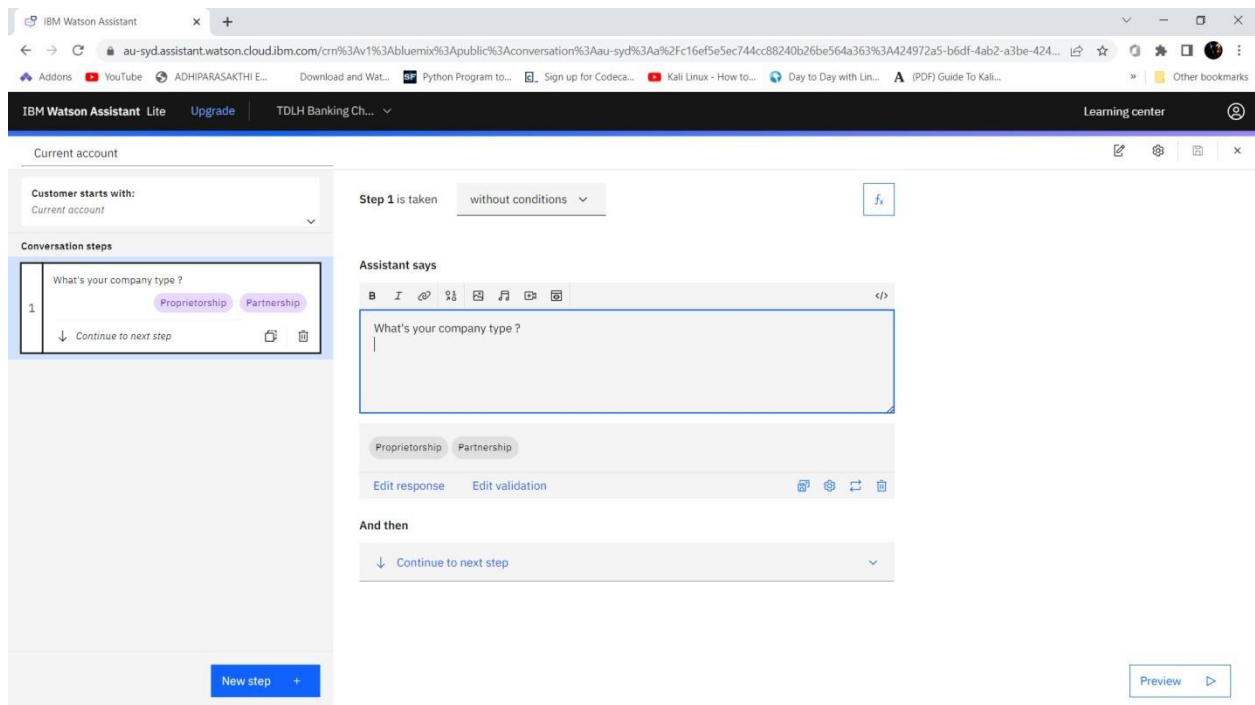
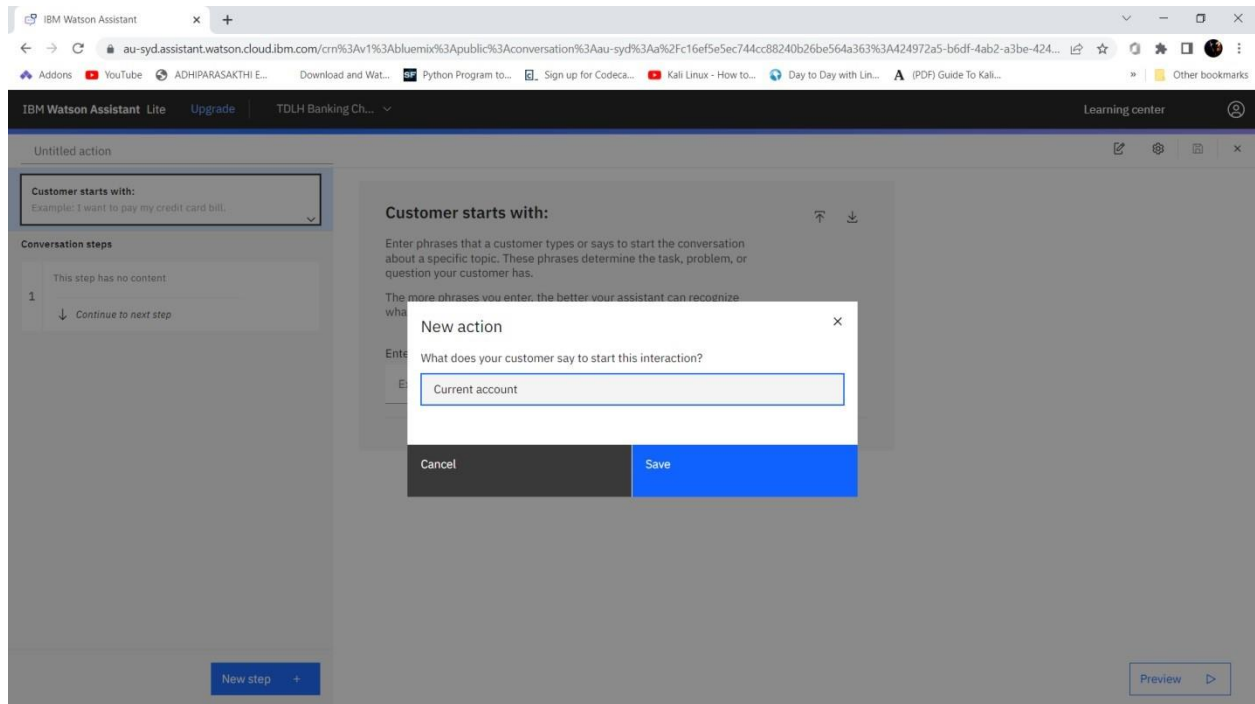
Upon return Continue

Edit settings Edit passed values

Preview



# Create current account action



IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/cn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2F16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-a3be-424...

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Current account

Customer starts with: Current account

Conversation steps

1 What's your company type? Proprietorship Partnership

2 Please take the following Documents and approach the closest branch 1)Income Tax returns and proprietor for the last 3 years 2)company Agreement 3)Pan card

Assistant says

Please take the following Documents and approach the closest branch

1)Income Tax returns and proprietor for the last 3 years

2)company Agreement

3)Pan card

Define customer response

And then

Go to another action

Goes to action End

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/cn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2F16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-a3be-424...

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Current account

Customer starts with: Current account

Conversation steps

1 What's your company type? Proprietorship Partnership

2 Please take the following Documents and approach the closest branch 1)Income Tax returns and proprietor f...

3 Please take the following Documents and approach the closest branch 1)Income Tax returns and proprietor f...

Step 3 is taken with conditions

Conditions

1 condition

If All of this is true:

1. What's your comp... is Partnership

and Add condition +

New condition group +

Assistant says

Please take the following Documents and approach the closest branch

1)Income Tax returns and proprietor for the last 3 years

2)company Agreement

3)Pan card on both partners

Define customer response

Preview

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2F16ef5e5ec744cc88240b26be564a363%3AA424972a5-b6df-4ab2-a3be-424...

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Index

Customer starts with:  
Index

Conversation steps

1

How can I help you?

Savings acco...Current acco...+ 3

Continue to next step

2

1 is Current account

This step has no content

Go to action: Current account

3

1 is Savings account

This step has no content

Go to action: Savings account

New step +

New condition group +

Assistant says

B I

For example: What type of transfer would you like to make?

Define customer response

And then

Go to another action

Goes to actionCurrent account

Pass values

Upon returnContinue

Edit settingsEdit passed values

Preview