

Project Development Phase

Delivery of Sprint-1

Date	12 November 2022
Team ID	PNT2022TMID26875
Project Name	AI BASED DISCOURSE FOR BANKING INDUSTRY

Greetings:

The screenshot displays the 'Greetings' configuration screen. On the left, the 'Customer starts with' dropdown is set to 'Hey'. Below it, the 'Conversation steps' list contains one step: 'Good to see you.' with a 'Go to action: Index' button. The main area shows the 'Customer starts with' section with instructions on how to enter phrases. A 'Preview' window on the right shows a chat interaction where the phrase 'Greetings' is recognized and the response is 'Good to see you.'

Creation of Account or Application:

The screenshot shows the 'Create an account (1)' configuration screen. The 'Customer starts with' dropdown is set to 'application register'. The 'Conversation steps' list has three 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!' with a 'Continue to next step' button.
- 'First, please provide your first name.' with a 'Free text' input field.
- 'Thanks! Now, enter your last name.' with a 'Free text' input field.

 The main area shows the 'Assistant says' section with the same text as step 1. Below it, there's a 'Define customer response' section. The 'Preview' window on the right shows the chat flow for 'Create an account (1)', where the phrase 'Create an account (1)' is recognized and the response is '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.

2

Tr Free text

↓ Continue to next step

Thanks! Now, enter your last name.

3

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...

Thanks! Now, enter your last name.

3

Tr Free text

↓ Continue to next step

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

4

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...

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

4

Regex

↓ Continue to next step

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

5

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

↓ Continue to next step

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

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

5

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

↓ Continue to next step

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

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.

0000099999

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

Enter your AADHAR Number

999999999999

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 your account.

Confirmation

↓ Continue to next step

6 is not Defined

5 is No, my email ...

Confirm your PIN or Password.

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

Yes No

View response Edit validation

And then

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 your account.

Confirmation

↓ Continue to next step

6 is not Defined

5 is No, my email ...

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 address.
- Aadhar No.: 8. Enter your AADHAR Number
- Phone Number: 6. Okay, please enter your **phone**
- Birthday: 9. Finally, I'll also need your **date of birth

Yes No

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

Final: Does the following information seem 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...

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

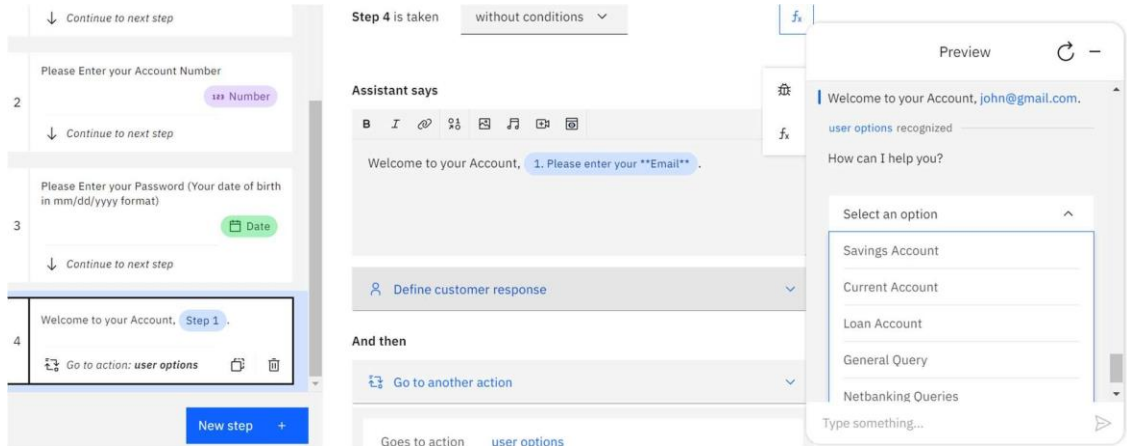
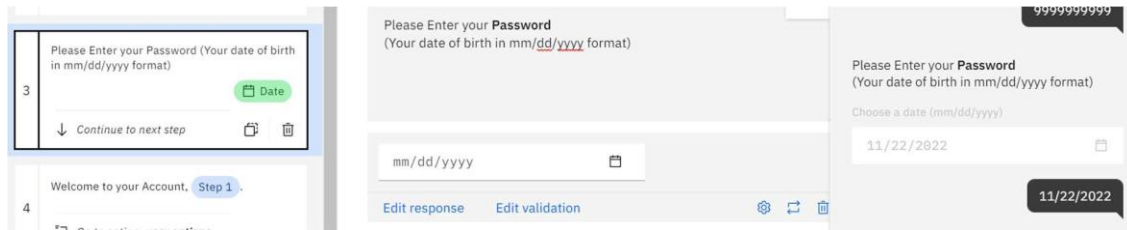
Continue to next step

Please Enter your Account Number

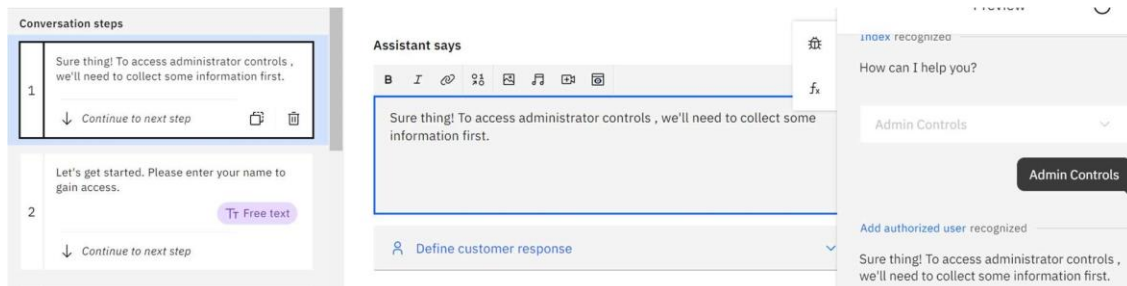
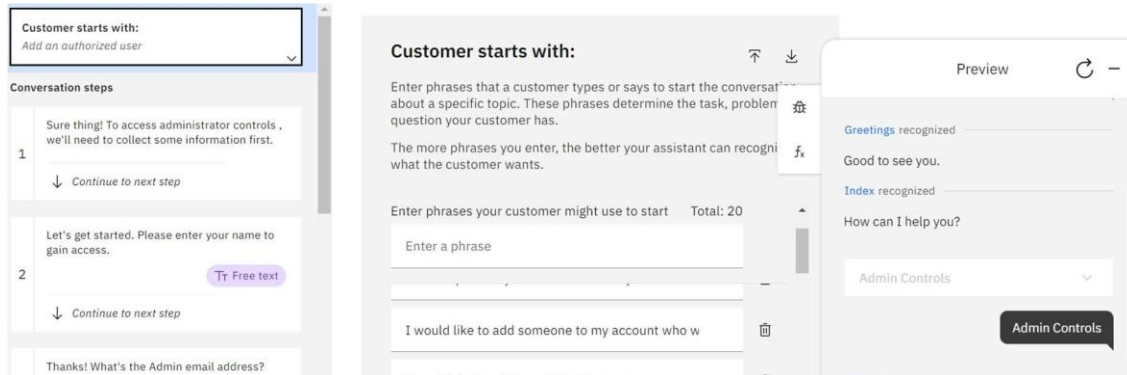
john@gmail.com

Please Enter your Account Number

9999999999



Admin Controls:



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

Continue to next step

3. Thanks! What's the Admin email address?

Continue to next step

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

User enters free text

Edit response Edit validation

And then

Admin Controls

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?

Continue to next step

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

Edit response Edit validation

And then

Continue to next step

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...
 Step 2 will receive an...

Continue to next step

5. What changes do you want to make ?

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 ?

Continue to next step

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

Go to action: End

New step +

User enters free text

Edit response Edit validation

And then

Continue to next 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 ?

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

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