

Project Development Phase

AI-based discourse for Banking Industry

TEAM ID: PNT2022TMID39294

TEAM MEMBERS

ROLE	TEAM MEMBERS NAME	ROLL NO
TEAM LEADER	JAGATHESWARAN. S	(422619104018)
TEAM MEMBER 1	DWARAGA. R.V	(422619104011)
TEAM MEMBER 2	JOSEPH VIKRAM. R	(422619104019)
TEAM MEMBER 3	DHIVYA. S	(422619104009)

Project Development - Delivery of Sprint-2

Sprint	Functional Requirement (Epic)	User Story Number	User Story / Task	Story Points	Priority	Team Members
Sprint-2	Chatbot Skills	USN- 3	Creating Savings Account Action	7	High	JAGATHESWARAN S
Sprint-2	Chatbot Skills	USN- 4	Creating Current Account Action	7	High	JAGATHESWARAN S
Sprint-2	Chatbot Skills	USN- 5	Creating Loan Account Action	6	High	DWARAGA R.V

Delivery

Sprint	Total Story Points	Duration	Sprint Start Date	Sprint End Date (Planned)	Story Points Completed (as on Planned End Date)	Sprint Release Date (Actual)
Sprint-2	20	6 Days	31 Oct 2022	5 Nov 2022	20	5 Nov 2022

Hardware / Software requirements

Hardware:

Processor: Intel Pentium

Ram: 512 MB

Storage: 256 MB

Software:

IBM Watson Assistant, Browser

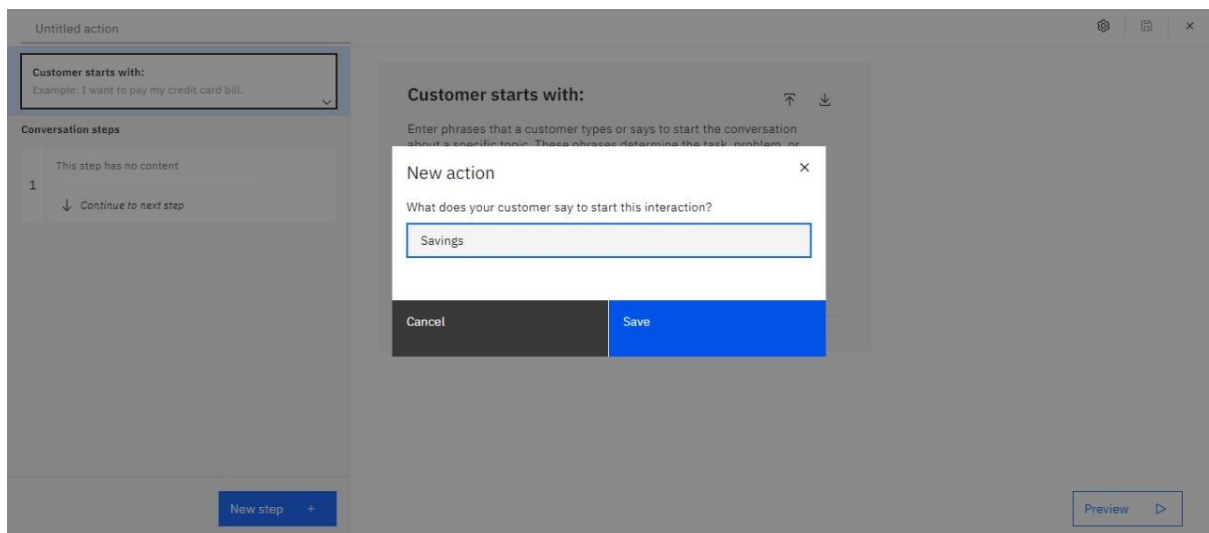
CREATING SAVINGS ACCOUNT ACTION

Task assigned: Jagatheswaran. S

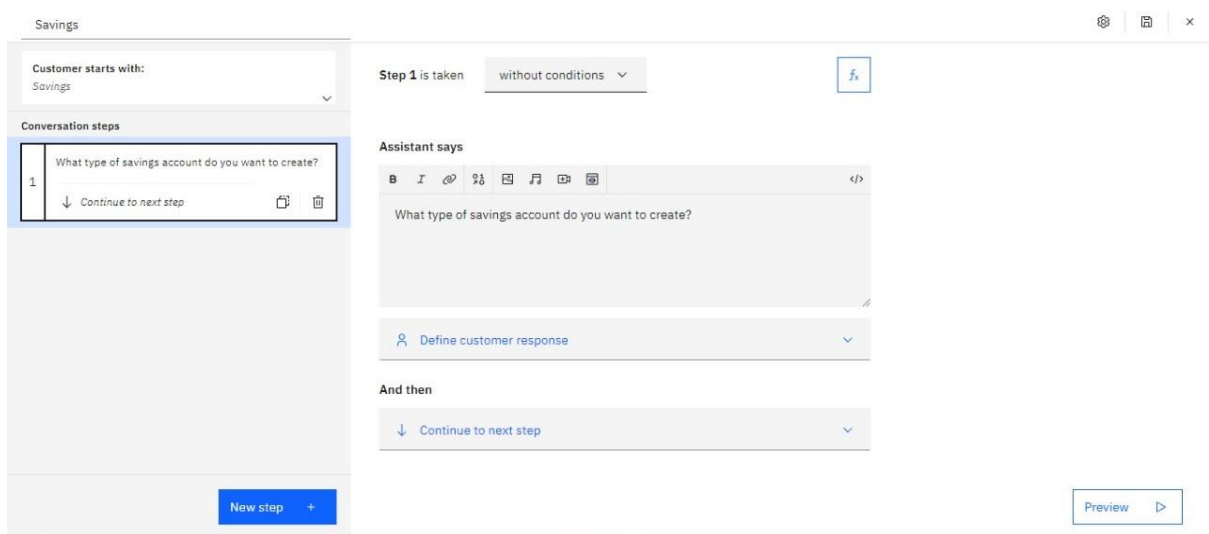
Task started on: 31- 10 - 2022

Task completion date: 01 - 11 - 2022

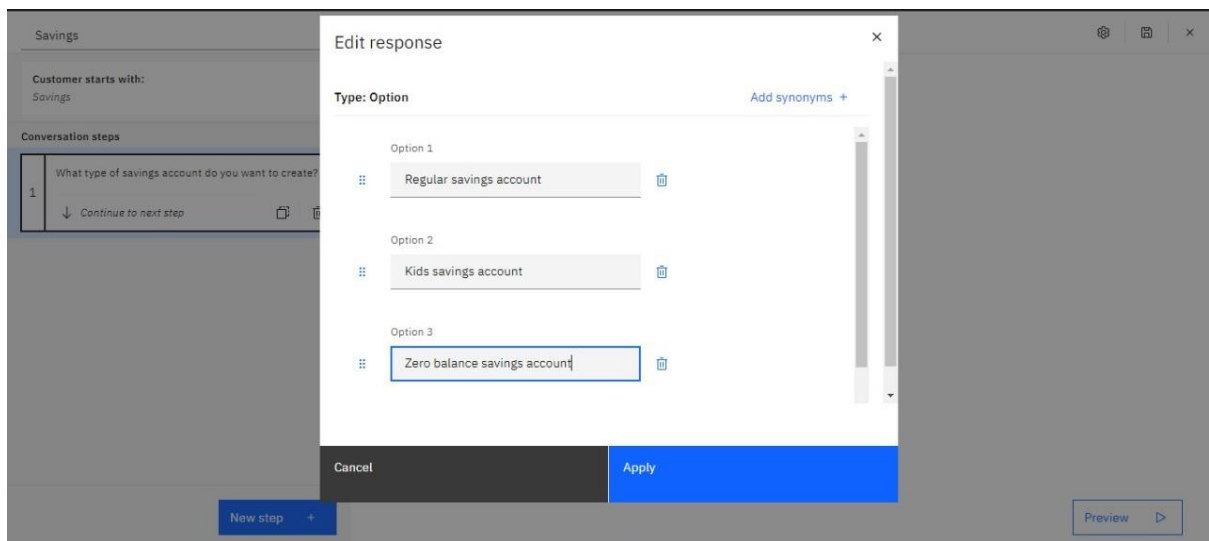
Progress 1: Created a new action for the Savings account.



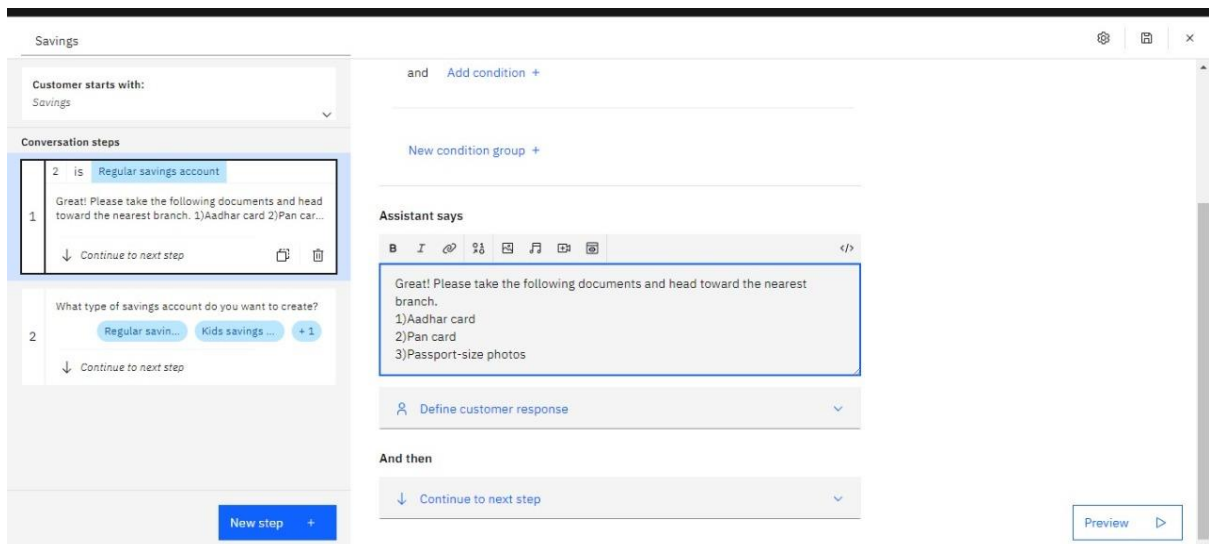
Progress 2: Creating the chatbot's response to the savings account message.



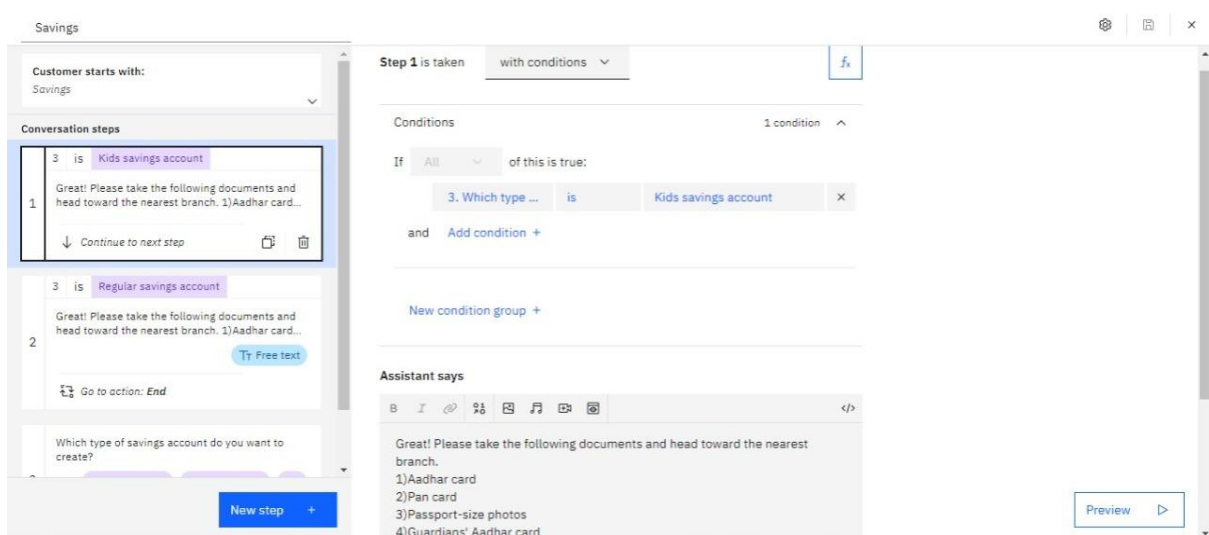
Progress 3: Adding available options for savings account action.



Progress 4: The “regular savings account” response is added.



Progress 5: The “kids savings account” response is added.



Progress 6: The “zero-balance savings account” response is added.

Savings

Conversation steps

4 is Kids savings account

1

Great! Please take the following documents and head toward the nearest branch. 1)Aadhar card...

Tr Free text

Go to action: End

4 is Zero balance savings account

2

Amazing! Please take the following documents and head toward the nearest branch. 1)Aadhar card...

Tr Free text

Continue to next step

4 is Regular savings account

3

Great! Please take the following documents and head toward the nearest branch. 1)Aadhar card...

Tr Free text

New step +

Conditions

1 condition

If All of this is true:

4. Which type ... is Zero balance savings acco...

and Add condition +

New condition group +

Assistant says

B I [icons]

Amazing! Please take the following documents and head toward the nearest branch.
1)Aadhar card
2)Pan card
3)Passport-size photos

Preview ▶

CREATING CURRENT ACCOUNT ACTION

Task assigned: Jagatheswaran. S

Task started on: 31 - 10 - 2022

Task completion date: 01 - 11 - 2022

Progress 1: Creating a new current action.

A screenshot of a 'New action' dialog box. It has a title bar with a close button (X). The main text asks 'What does your customer say to start this interaction?'. Below this is a text input field containing the word 'Current'. At the bottom, there are two buttons: 'Cancel' on the left and 'Save' on the right.

Progress 2: Asking the user "what's your company type?" and show the available options immediately after the user chooses the current account.

A screenshot of a conversation flow editor. The main area shows 'Step 1 is taken' with a dropdown menu set to 'without conditions'. Below this, the 'Assistant says' section contains a text input field with the text 'What's your company type?'. Below the input field is a button labeled 'Define customer response'. Underneath that is the 'And then' section with a dropdown menu set to 'Continue to next step'. On the left side, there is a 'Conversation steps' list with one step: '1 What's your company type?' with a 'Continue to next step' button. At the bottom left, there is a 'New step +' button. At the bottom right, there is a 'Preview' button with a play icon. A modal window titled 'Edit response' is open at the bottom, showing 'Type: Option' and 'Add synonyms +'. It lists three options: 'Option 1: Proprietorship', 'Option 2: Partnership', and 'Option 3: Example: Savings account'. The modal has 'Cancel' and 'Apply' buttons at the bottom.

Progress 3: The “proprietorship” answer is added.

The screenshot shows a chatbot configuration window. On the left, the 'Conversation steps' panel shows Step 1 with the question 'What's your company type?' and two possible answers: 'Proprietorship' and 'Partnership'. Step 2 is highlighted, showing a prompt to 'Please take the following documents and approach the closest branch. 1)Income Tax Returns of the...' with a 'Free text' input field. On the right, the 'Conditions' panel for 'Step 2 is taken' shows a single condition: 'If All of this is true: 1. What's you... is Proprietorship'. Below this, the 'Assistant says' panel displays the response text: 'Please take the following documents and approach the closest branch. 1)Income Tax Returns of the proprietor for the last 3 years 2)Company Agreement 3)Pan card'. A 'Preview' button is visible at the bottom right.

Progress 4: The “partnership” response is being added.

The screenshot shows the same chatbot configuration window, but now with a third step added. In the 'Conversation steps' panel, Step 3 is highlighted, showing a prompt to 'Please take the following documents and approach the closest branch. 1)Income Tax...' with a 'Free text' input field. The 'Conditions' panel for 'Step 3 is taken' shows a single condition: 'If All of this is true: 1. What's you... is Partnership'. Below this, the 'Assistant says' panel displays the response text: 'Please take the following documents and approach the closest branch. 1)Income Tax Returns of the proprietor for the last 3 years 2)Company Agreement 3)Pan card of both partners'. A 'Define customer response' button is visible at the bottom left, and a 'Preview' button is at the bottom right.

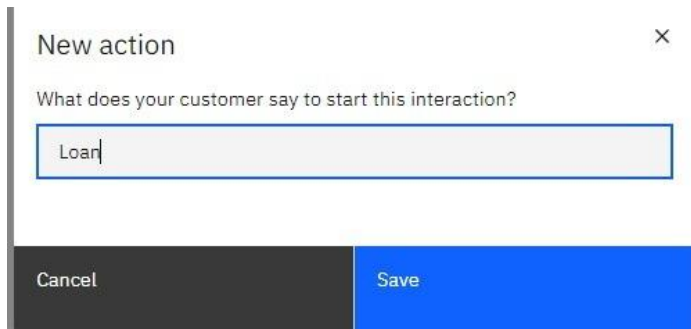
CREATING LOAN ACCOUNT ACTION

Task assigned: Dwaraga R.V

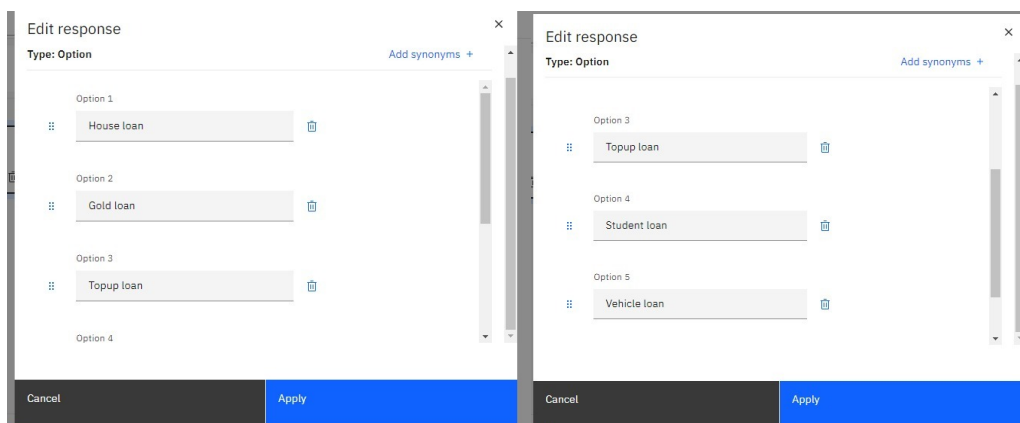
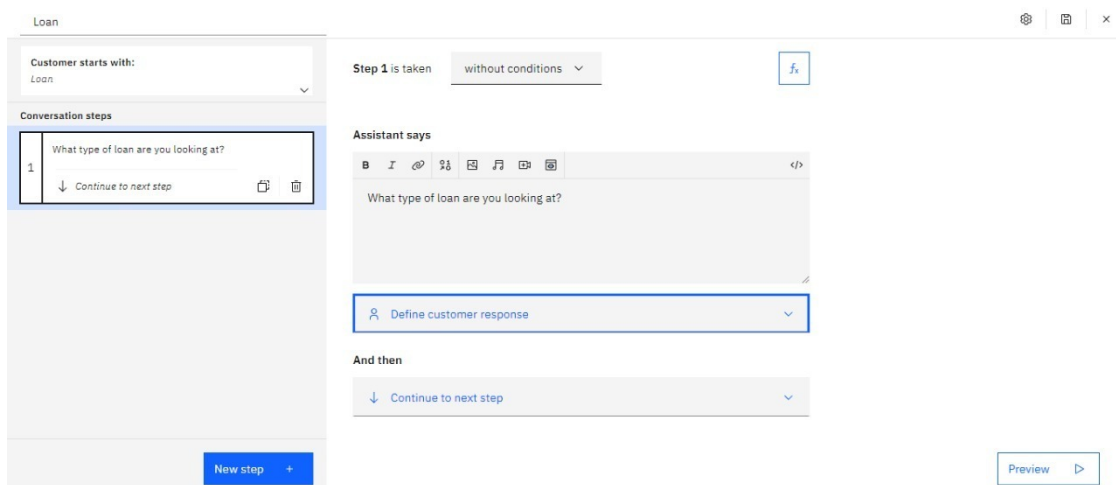
Task started on: 31- 10 - 2022

Task completion date: 01 - 11 - 2022

Progress 1: Created a new action for the Loan account.



Progress 2: Asking the user "what type of loan are you looking for" and show the available options immediately after the user chooses the loan account query.



Progress 3: The “House loan” response is being added.

The screenshot shows the configuration interface for a chatbot named "Loan". On the left, the "Conversation steps" panel shows a sequence of steps. Step 1 asks "What type of loan are you looking at?" with options "House loan" and "Gold loan". Step 2 is highlighted, showing a response for "House loan": "To be eligible for a house loan, please contact the bank service provider with all your existing loan...". On the right, the "Step 2 is taken" configuration panel shows a condition: "If All of this is true: 1. What type ... is House loan". The "Assistant says" panel shows the response text: "To be eligible for a house loan, please contact the bank service provider with all your existing loan details."

Progress 4: The “Gold loan” response is being added.

The screenshot shows the configuration interface for the "Loan" chatbot. The "Conversation steps" panel on the left shows Step 3 highlighted, with a response for "Gold loan": "Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passpor...". The "Step 3 is taken" configuration panel on the right shows a condition: "If All of this is true: 1. What type ... is Gold loan". The "Assistant says" panel shows the response text: "Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passport-size photos".

Progress 5: The “Top-up loan” response is being added.

The screenshot shows the configuration interface for the "Loan" chatbot. The "Conversation steps" panel on the left shows Step 4 highlighted, with a response for "Topup loan": "To be eligible for a house loan, please contact the bank service provider with all your existing loan...". The "Step 4 is taken" configuration panel on the right shows a condition: "If All of this is true: 1. What type ... is Topup loan". The "Assistant says" panel shows the response text: "To be eligible for a house loan, please contact the bank service provider with all your existing loan details."

Progress 6: The “Student loan” response is being added.

The screenshot shows the 'Loan' chatbot interface. On the left, a list of steps is visible: Step 1 (Gold loan), Step 3 (End), Step 4 (Topup loan), and Step 5 (Student loan). Step 5 is highlighted. The main area shows the configuration for Step 5. The condition is 'Step 5 is taken with conditions'. The assistant's response is: 'Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passport-size photos'. A 'Preview' button is visible at the bottom right.

Loan

1 is Gold loan

Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passport...

3

Go to action: End

1 is Topup loan

To be eligible for a house loan, please contact the bank service provider with all your existing loan...

4

Go to action: End

1 is Student loan

Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passport...

5

Continue to next step

New step +

Step 5 is taken with conditions

Conditions 1 condition

If All of this is true:

1. What type ... is Student loan

and Add condition +

New condition group +

Assistant says

Please approach the bank with the following documents:

1)Aadhar card

2)Pan card

3)Passport-size photos

Preview

Progress 7: The “Vehicle loan” response is being added.

The screenshot shows the 'Loan' chatbot interface. On the left, a list of steps is visible: Step 1 (Topup loan), Step 4 (End), Step 5 (Student loan), and Step 6 (Vehicle loan). Step 6 is highlighted. The main area shows the configuration for Step 6. The condition is 'Step 6 is taken with conditions'. The assistant's response is: 'Kindly approach the bank with the following documents. 1)Automobile Invoice 2)Pan card 3)Income Tax Returns for the last three years'. A 'Preview' button is visible at the bottom right.

Loan

1 is Topup loan

To be eligible for a house loan, please contact the bank service provider with all your existing loan...

4

Go to action: End

1 is Student loan

Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passport...

5

Go to action: End

1 is Vehicle loan

Kindly approach the bank with the following documents. 1)Automobile Invoice 2)Pan card...

6

Continue to next step

New step +

Step 6 is taken with conditions

Conditions 1 condition

If All of this is true:

1. What type ... is Vehicle loan

and Add condition +

New condition group +

Assistant says

Kindly approach the bank with the following documents.

1)Automobile Invoice

2)Pan card

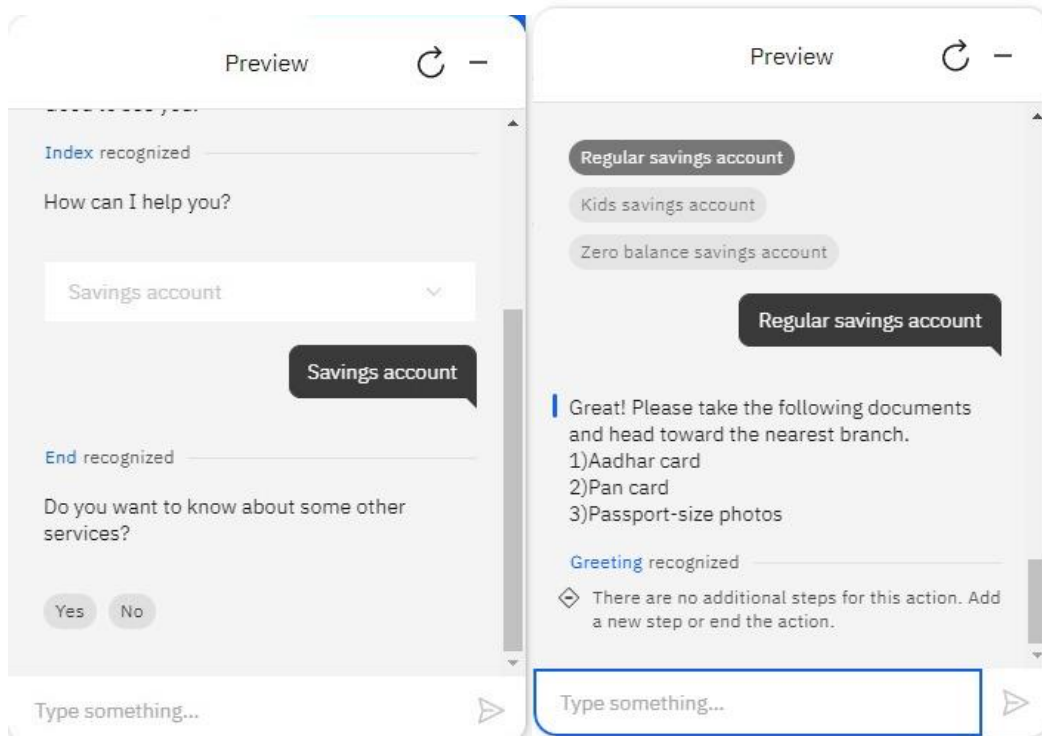
3)Income Tax Returns for the last three years

Preview

Testing the chatbot

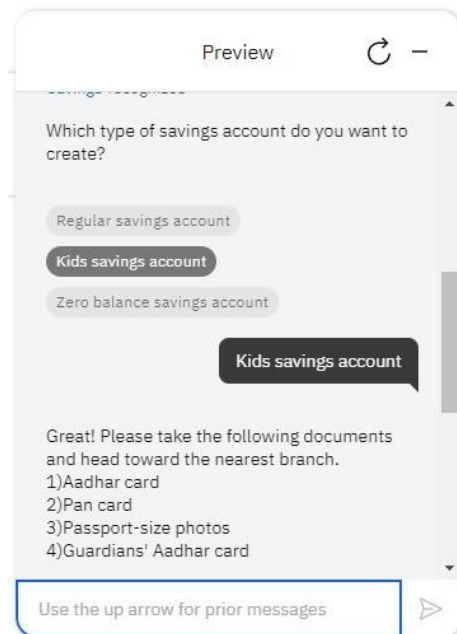
The Savings Account Action is being tested.

Testing 1: Savings account and Regular savings account.



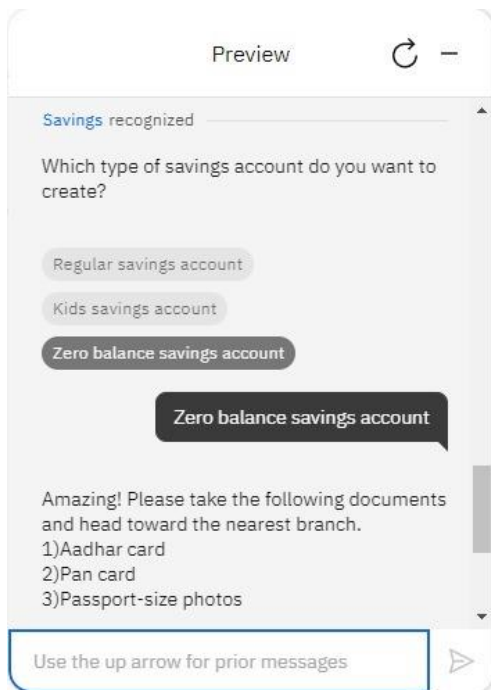
Test result: passed

Testing 2: Kids savings account.



Test result: passed

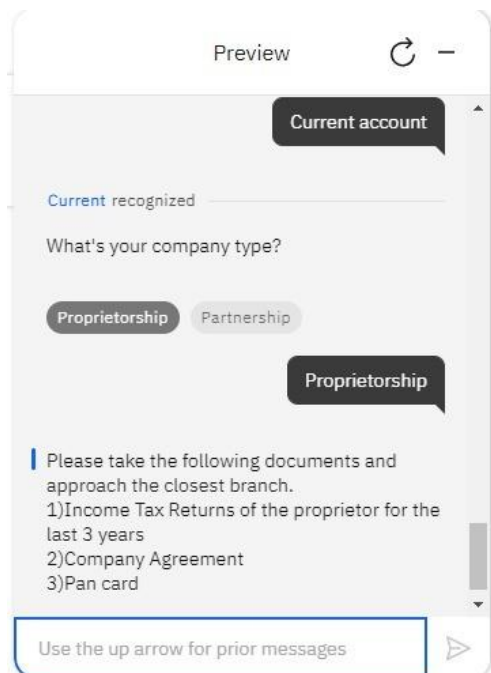
Testing 3: Zero balance savings account.



Test result: passed

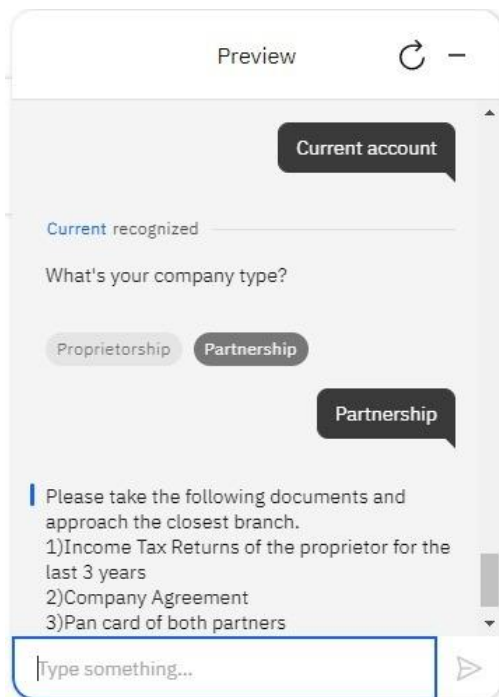
The Current Account Action is being tested.

Testing 1: Proprietorship.



Test result: passed

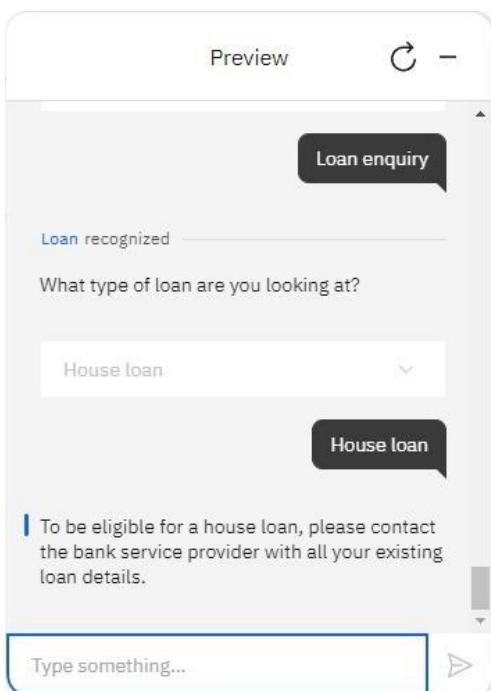
Testing 2: Partnership.



Test result: passed

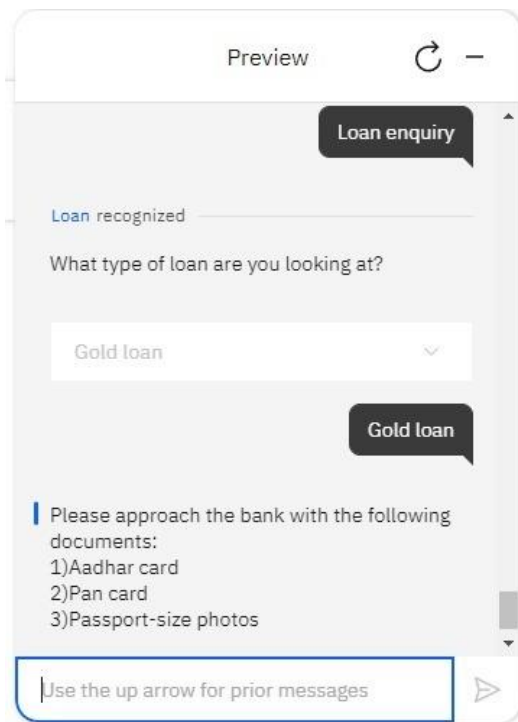
The Loan Account Action is being tested.

Testing 1: Loan enquiry and House loan



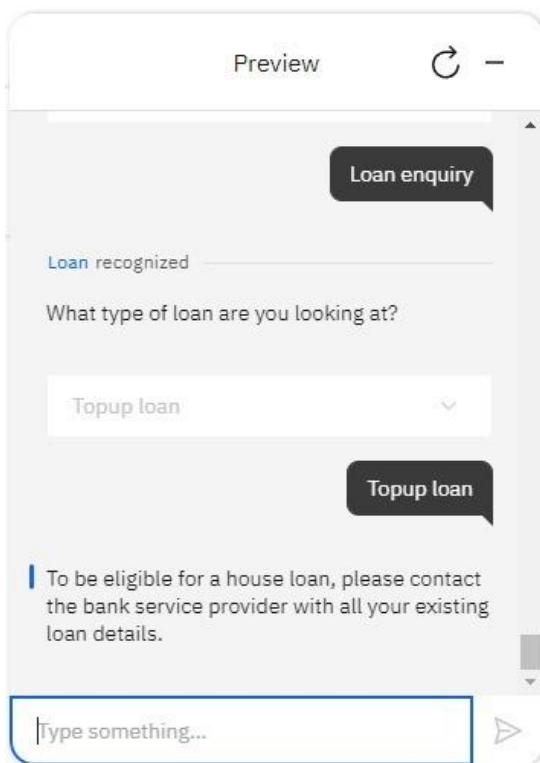
Test result: passed

Testing 2: Gold loan



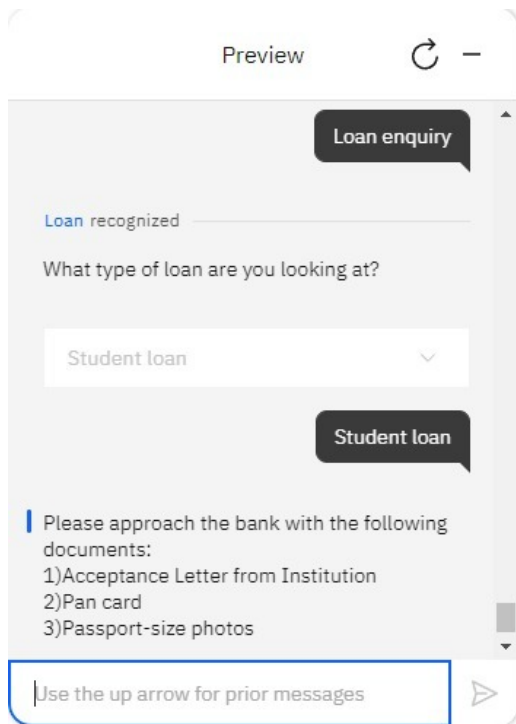
Test result: passed

Testing 3: top-up loan.



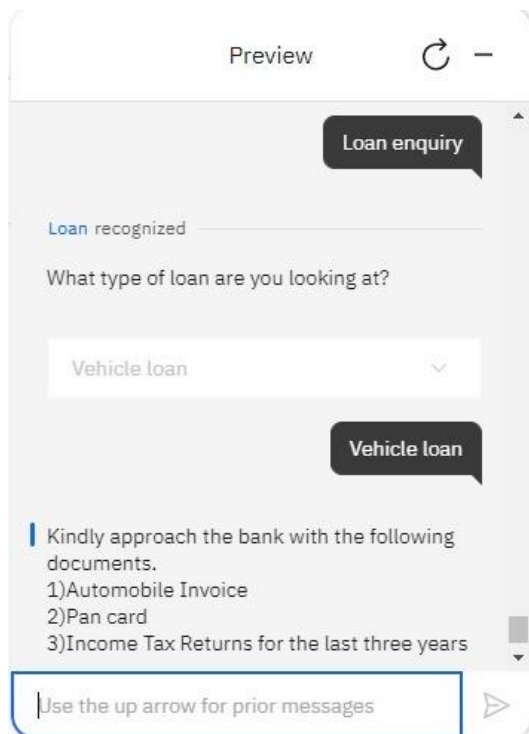
Test result: passed

Testing 4: Student loan.



Test result: passed

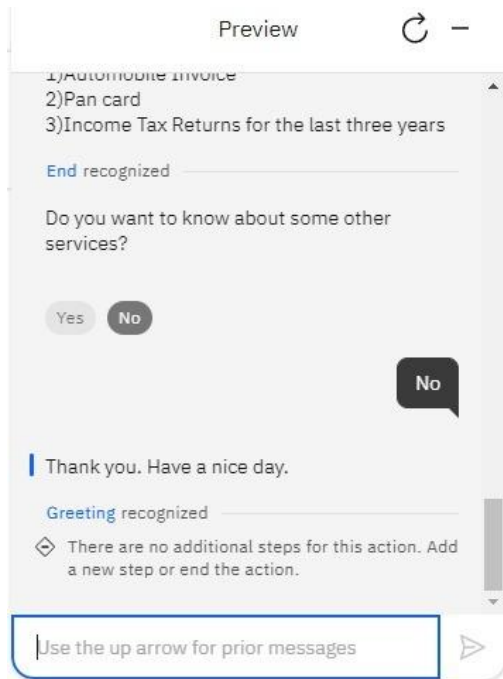
Testing 5: Vehicle loan.



Test result: passed

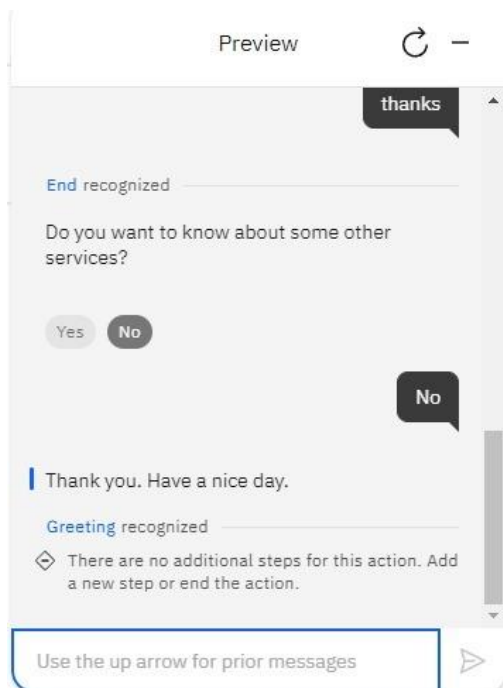
All existing actions and conversation-ending action links are being tested.

Testing 1: without free-text feature



Test result: passed

Testing 2: with free-text feature



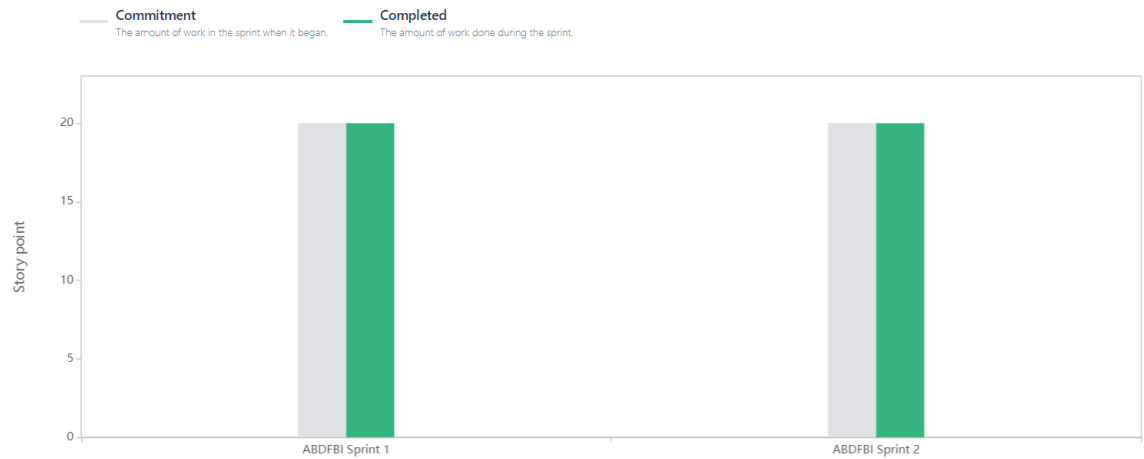
Test result: passed

JIRA

Projects / AI Based Discourse For Banking Industry / Reports

Velocity report

[How to read this report](#)



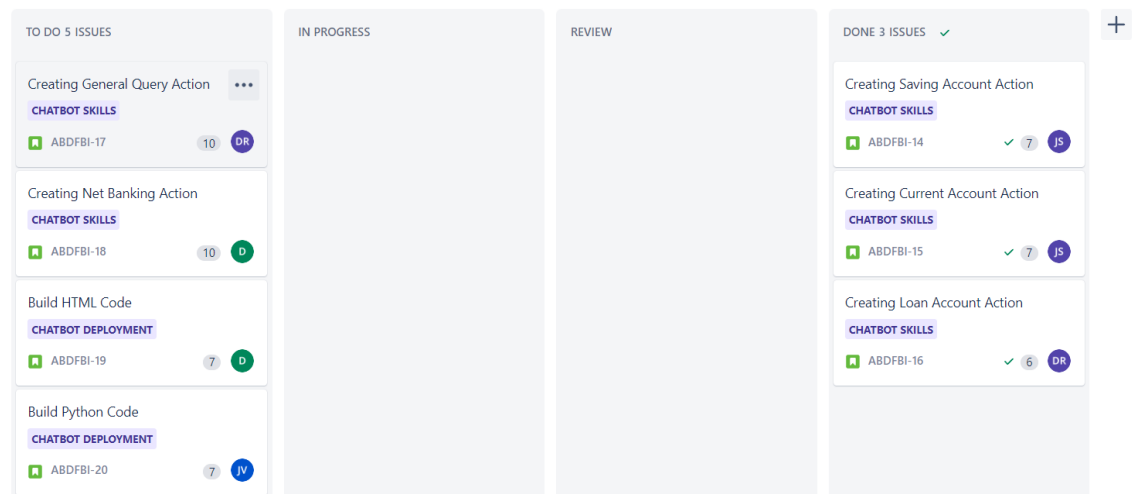
Projects / AI Based Discourse For Banking Industry

All sprints

[Complete sprint](#)

JS DR D JV Epic Sprint

GROUP BY None Insights



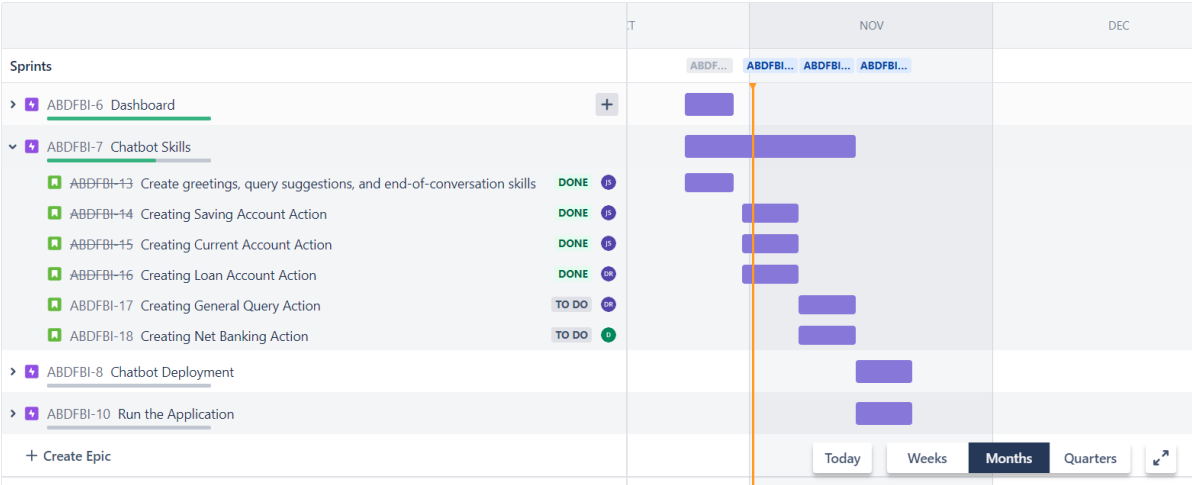
Roadmap

Give feedback Share Export ...

JSJVDR

Status category

View settings



Backlog

...

JSDRD JV

Epic

Insights

Epic

Issues without epic

Dashboard

Chatbot Skills

Chatbot Deployment

ABDFBI Sprint 2 31 Oct – 6 Nov (3 issues)

Creating Saving Account Action , Creating Current Account Action , Creating Loan Account Action

ABDFBI-14 Creating Saving Account Action CHATBOT SKILLS 7 DONE JS

ABDFBI-15 Creating Current Account Action CHATBOT SKILLS 7 DONE JS

ABDFBI-16 Creating Loan Account Action CHATBOT SKILLS 6 DONE DR

Create issue

Sprint burndown chart

How to read this report

Sprint

ABDFBI Sprint 2

Estimation field

Story points

...

Date - October 31st, 2022 - November 6th, 2022
Sprint goal - Creating Saving Account Action , Creating Current Account Action , Creating Loan Account Action

