# Project Development Phase
## Sprint 2

| Date | 05 November 2022 |
|---|---|
| Team ID | PNT2022TMID19406 |
| Project Name | AI BASED DISCOURSE FOR BANKING INDUSTRY |
| Maximum Marks | 8 Marks |

## Screenshots of Sprint 2 Tasks:

**Creating Loan Account Actions:**
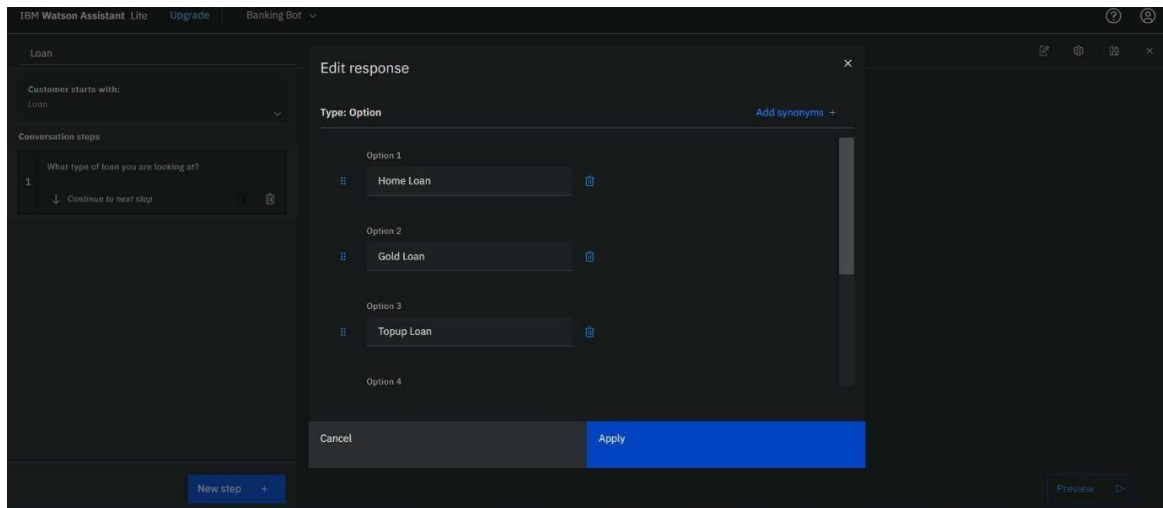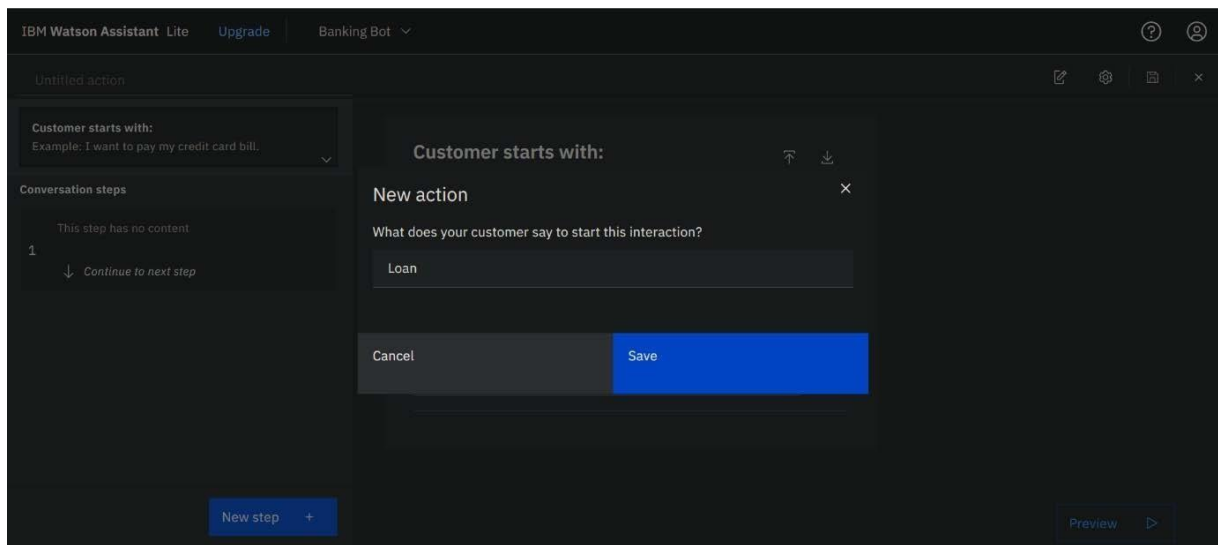
Loan

What type of loan you are looking at?
Home Loan    Student Loan    + 3

1  ↓ Continue to next step

1  is  Gold Loan

Please approach the bank with the following documents:
2                    Tr Free text

⇄ Go to action: **End**

1  is  Topup Loan

To be eligible for top-up loan please contact
3  our bank service providers with all existing...
                    Tr Free text

New step  +

**Conditions**                    1 condition  ∧

If  All  ∨  of this is true:

1. What typ...    is    Gold Loan    ✕

and  Add condition +

New condition group +

**Assistant says**

B  I  𝒪  ⅔  🖼  ♫  ▣  ▣                    </>

Please approach the bank with the following documents:
• PAN Card
• Aadhaar Card
• Passport size photos

Preview  ▷

---

Loan

↓ Continue to next step

1  is  Gold Loan

Please approach the bank with the following documents:
2                    Tr Free text

⇄ Go to action: **End**

1  is  Topup Loan

To be eligible for top-up loan please contact
3  our bank service providers with all existing...
                    Tr Free text

⇄ Go to action: **End**

1  is  Vehicle Loan

New step  +

**Conditions**                    1 condition  ∧

If  All  ∨  of this is true:

1. What typ...    is    Topup Loan    ✕

and  Add condition +

New condition group +

**Assistant says**

B  I  𝒪  ⅔  🖼  ♫  ▣  ▣                    </>

To be eligible for top-up loan please contact our bank service providers with all existing loan details.

Preview  ▷

---

Loan

To be eligible for top-up loan please contact
3  our bank service providers with all existing...
                    Tr Free text

⇄ Go to action: **End**

1  is  Vehicle Loan

Kindly approach the bank with the following documents:
4                    Tr Free text

⇄ Go to action: **End**

1  is  Student Loan

Please visit the nearest available bank with
5  the following documents.

New step  +

1. What typ...    is    Vehicle Loan    ✕

and  Add condition +

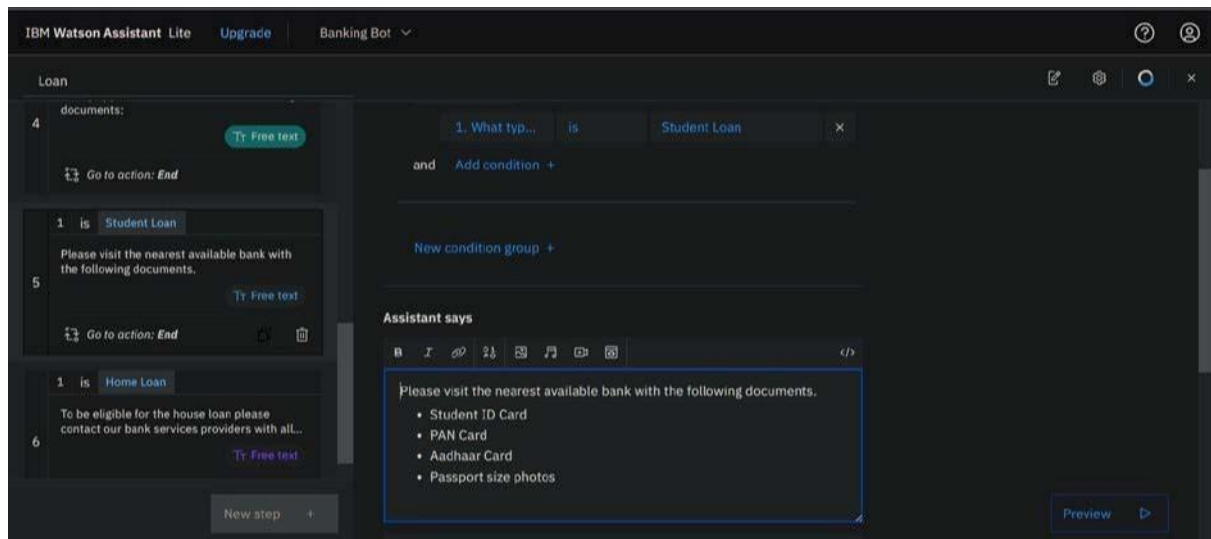New condition group +

**Assistant says**

B  I  𝒪  ⅔  🖼  ♫  ▣  ▣                    </>

Kindly approach the bank with the following documents:
• Automobile Invoice
• PAN Card
• Income Tax Returns for the last three years

Preview  ▷

User enters free text

Loan

4    documents:

                 Tт Free text

   ⇄ Go to action: **End**

1    is    Student Loan

Please visit the nearest available bank with the following documents.

5                  Tт Free text

   ⇄ Go to action: **End**

1    is    Home Loan

To be eligible for the house loan please contact our bank services providers with all...

6                  Tт Free text

New step    +

---

1. What typ...    is    Student Loan    ×

and    Add condition   +

New condition group +

**Assistant says**

B   I   ⊘   ⅜   ▣   ♫   ▣   ▣          ‹/›

Please visit the nearest available bank with the following documents.
- Student ID Card
- PAN Card
- Aadhaar Card
- Passport size photos

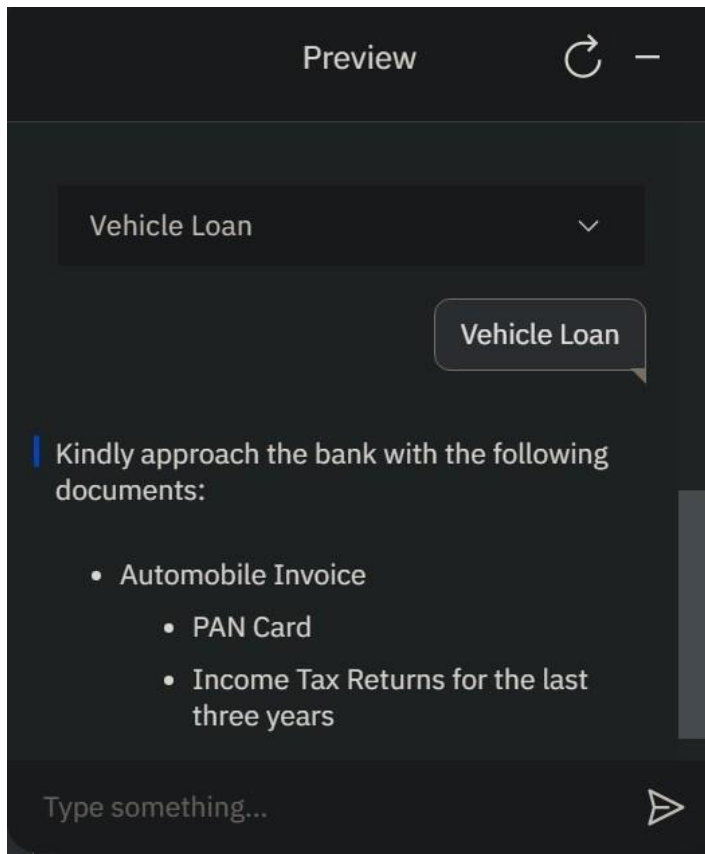Preview ▷

---

Preview

Welcome to IBM Bank. Good to see you!

How can I help you?
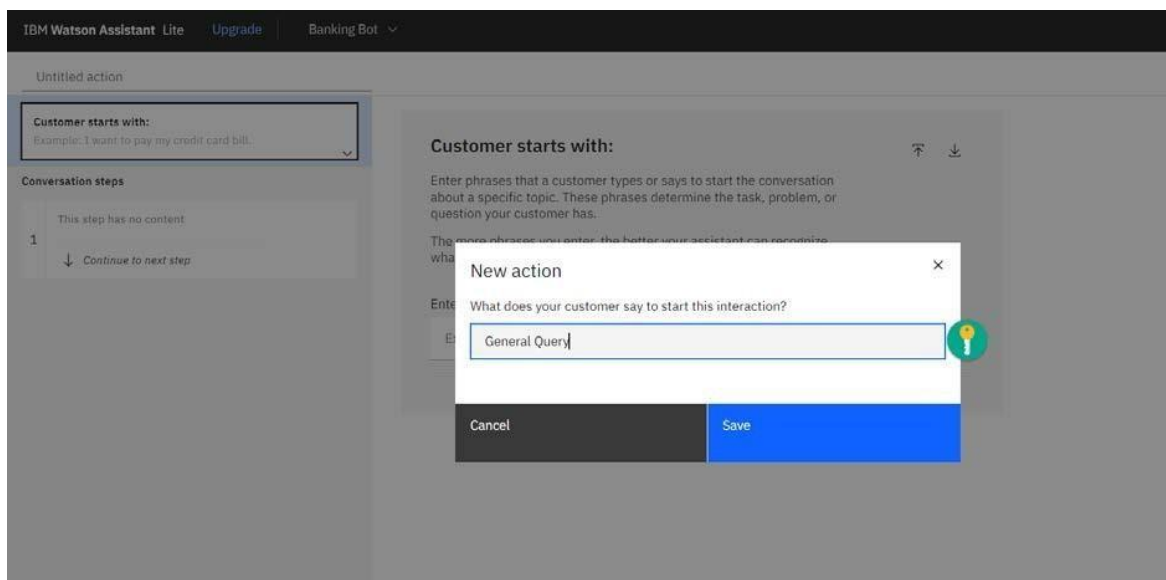
Loan Accordnt

Loan Account

Wnat type of loan you are looking at?

**Creating General Query Action:**
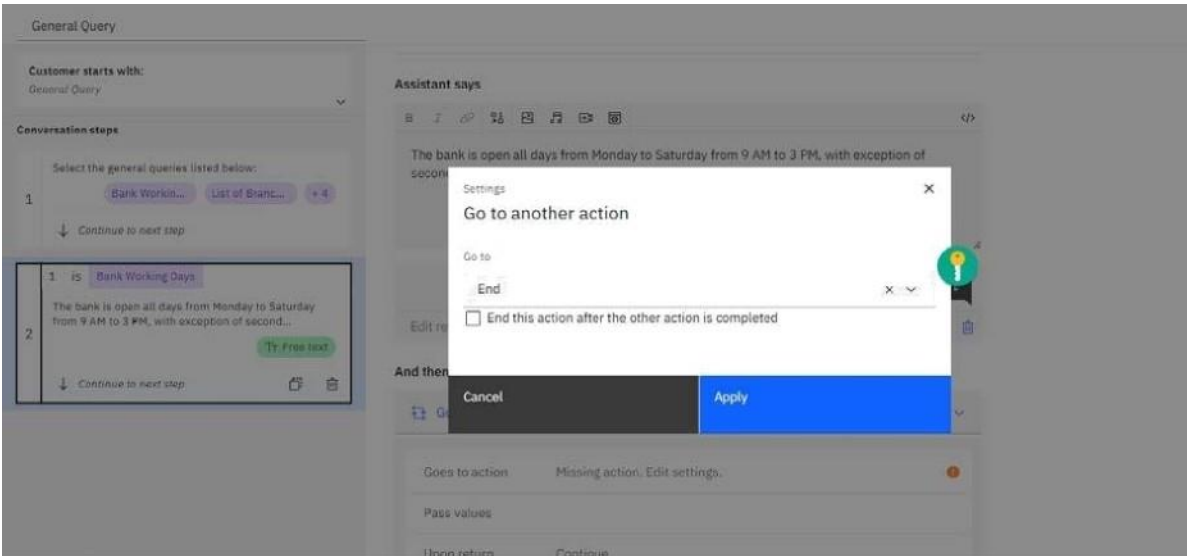
## Edit response

×

Type: Option

Add synonyms +

:.    Bank Working Days    🗑

:.    List of Branches    🗑

"-    Storage Locker *acility    🗑

---

General Query

Customer starts with:
General Query

Assistant says

B    I    ⬚    ⬚    ⬚    ⬚    ⬚    ⬚

The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of secon...

Conversation steps

Select the general queries listed below:
1    Bank Workin...    List of Branc...    + 4

↓ Continue to next step

1    is    Bank Working Days

The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of second...

2                                    Tr Free text

↓ Continue to next step    ⬚    🗑

Settings    ×

### Go to another action

Go to

End                                    ×  ∨

☐ End this action after the other action is completed

Cancel                    Apply

Goes to action    Missing action. Edit settings.    ⬤

Pass values

Upon return    Continue

General guery

Customer starts with:

If      of this is true:

     i. *eleri ihe genera...    is     Bank Working Days

and    Add condition +

Select the general queries listed below:

↓ Continue to next step    New condition group G

2 «omPAnbJPu.w‹ ne*cepoo,oseconB.

↓ Continue to next step

B   I   ⊘   ⅗   🖼   ♫   🎬   ▣     ‹/›

The bank is open all days from Hon'day to Saturday fyom 9 Af4 to 3 PH, nith exception of spend **Saturdays.**

A Oefine customer response

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How can I help you?

General Quer...   Loan Account   + 3

Step 4 is taken    with Conditions v      $f_x$

Conditions            1 condition

If      of this is true:

New condition grgup +

G reetings recognized

Welcome to IBt•i Bank. Good to see you!

goto Index

How can I help you?

go to General *Q a e* ry

Select the general queries listed below:

General g uei ies

Bank Working Days

go to General Query

Select the general queries listed below:

The bank is open all days from Monday to Saturday from 9 AM to 3 Pf•1, with exception of second Saturdays.

Select an option      w

General Query

**Customer starts with:**
General Query

**Conversation steps**

1
Select the general queries listed below:

Currency Con...    CIBIL    + 4

↓ Continue to next step

2
1 is  Bank Working Days

The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of second...

Tᴛ Free text

⇄ Go to action: **End**

3
1 is  List of Branches

ADYAR,ALWARPET,ANNA NAGAR,AYANAVARAM,ASHOK NAGAR,EGMORE,RAMAPURAM,KK...

Tᴛ Free text

⇄ Go to action: **End**

New step  +

---

**Step 3** is taken    with conditions ∨    *f*ₓ

Conditions                                1 condition  ∧

If  All  ∨  of this is true:

1. Select the genera...    is    List of Branches    ✕

and  Add condition  +

New condition group  +

**Assistant says**

B  *I*  ⊘  ✂  ▣  ♫  ▣  ▣                    </>

ADYAR,ALWARPET,ANNA NAGAR,AYANAVARAM,ASHOK NAGAR,EGMORE,RAMAPURAM,KK NAGAR,KARAPAKKAM,KOYAMBEDU,WEST MAMBALAM

*User enters free text*

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**Creating Netbanking Action:**

## 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 wha

**New action**                                    ✕

What does your customer say to start this interaction?

Net Banking

Cancel                    Save

# Edit response

Type: Option

Add synonyms +

||     What is Net Banking?     🗑

::     How do I register for Net Banking?     🗑

Opt ion 3

||     What are the features of Net Banking?     jg

---

Net Banking

**Customer starts with:**

Step 2 is taken     with conditions     $f_x$

**Conversation steps**

What queres do you flave regardng MeibanWng?

1   [ What is Net B... ] [ How do I regi... ] [ + 2 ]

Conaitions     1 condition

If     o|this is1 ue:

    1. What queries do ... | is     What is Net Banking?

and   Add condition +

┌─────────────────────────────────────────┐
│ 1   is   What is Net Banking? │
│ The facility offered by the bank allows customers to │
│ use banking services over the internet. Customers ne... │
│      [ Tᴛ Free text ] │
│ ↓ Continue to next step    📋 🗑 │
└─────────────────────────────────────────┘

New condrlion group *

Assistant says

The facility oflered by the bank allows customers to use banking services over the internet. Customers need not visit their banks dranch office to availe'ach and eve'ry small service.

[ New step + ]      User enters free text

Net Banking

**Customer starts with:**
*Net Banking*                                                    ∨

**Conversation steps**

1   What queries do you have regarding Net banking?

   [What is Net B...]  [How do I regi...]  [+ 2]

   ↓ Continue to next step          ⎘  🗑

2   1  is  [What is Net Banking?]

   The facility offered by the bank allows customers to
   use banking services over the internet. Customers ne...

                                   Tᴛ Free text

   ⮂ *Go to action:* **End**

3   1  is  [How do I register for Net Banking?]

   Please download and fill up the net banking requisition
   form and submit it to your home branch.

                                   Tᴛ Free text

   ⮂ *Go to action:* **End**          ⎘  🗑

                                   [ New step   + ]

**Step 3** is taken    [ with conditions ∨ ]                    [ fₓ ]

Conditions                                    1 condition   ∧

If  [ All ∨ ]  of this is true:

        [1. What queries do ...]  [is]  [How do I register for Net Banking?]  ✕

   and   Add condition +                                      🔑

   New condition group +

**Assistant says**

B  *I*  ⦿  ⁒  🖻  ♫  ▣  ▣                                    </>

Please download and fill up the net banking requisition form and submit it to your home
branch.

                                          **User enters free text**

---

Net Banking

                                   Tᴛ Free text

   ⮂ *Go to action:* **End**

3   1  is  [How do I register for Net Banking?]

   Please download and fill up the net banking
   requisition form and submit it to your home branch.

                                   Tᴛ Free text

   ⮂ *Go to action:* **End**

4   1  is  [What are the features of Net Banking?]

   - Check the account statement online - Open a fixed
   deposit account - Pay utility bills such as water bill...

                                   Tᴛ Free text

   ⮂ *Go to action:* **End**

5   1  is  [Facing errors in Net Banking?]

   Please contact our Customer care executive or
   approach the closest branch.

                                   Tᴛ Free text

   ⮂ *Go to action:* **End**          ⎘  🗑

                                   [ New step   + ]

**Step 5** is taken    [ with conditions ∨ ]                    [ fₓ ]

Conditions                                    1 condition   ∧

If  [ All ∨ ]  of this is true:

        [1. What queries do ...]  [is]  [Facing errors in Net Banking?]  ✕

   and   Add condition +                                      🔑

   New condition group +

**Assistant says**

B  *I*  ⦿  ⁒  🖻  ♫  ▣  ▣                                    </>

Please contact our Customer care executive or approach the closest branch.

                                          **User enters free text**

Edit response    Edit validation

Net Banking

and     Add condition +

New condition group +

Please down load and MU up Ehe new banking
requisition form and subm t it tO your home branch.

3

Tᴛ Free text

Assistant says

| 1 | is | What are the features of Net Banking? |

The following are the feat ores at a net banking
account: - Check the account statement online -...

Tᴛ Free text

⤢ Go to action: **End**                              ⧉    🗑

| 1 | is | Facing errors in Net Banking? |

PeasecontactourCustome<c:reexecunveor
approach‹hecosestbranch.

/,weeiez/

TheiotowingareiheteaturesoTa netbankingaccount:
- Check the account statement online
- Open a fixed deposit account
- Pay utility bills such as water bills and electricity di1ls
- Make merchant payments
- Transfer funds
- Order a cheque book
- Buy general insurance
- Recharge prepaid mobile/DTH

`User enters free text`

Edit response     Edit validation                              ⚙ ⇄ 🗑

go to Net Banking

What queries do you have regarding Net
banking?

What is Net Ban king?

**How do I register for Net Banking?**

What are the features of Net Banking?

Facing errors in Net Banking?

*HORN* CI I i e•ister for Net
Banking?

Please download and fill up the net banking

requisition form and submit it to your home
branch.

okay