

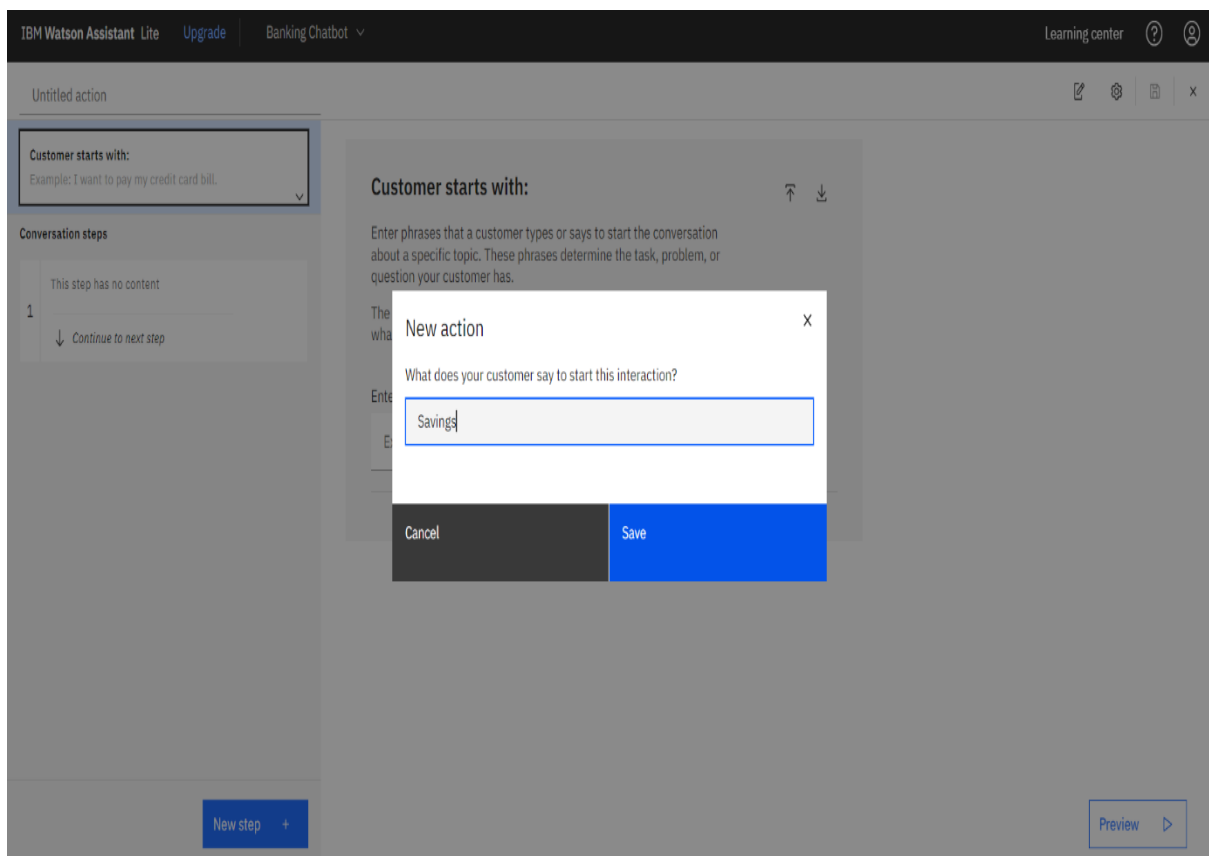
PROJECT DEVELOPMENT PHASE

SPRINT 2

Date	05 November 2022
Team ID	PNT2022TMID00963
Project Name	Project -AI based discourse for Banking Industry

CREATING SAVINGS ACCOUNT ACTIONS:

- To get the details regarding documents required for creating the savings account.
- The user to check the Interest rates and minimum balance of the savings account.



ACTION:

TBM Watson Assistant Lite Upgrade Banking Chatbot Learning center ?

Savings

Customer starts with: Savings

Conversation steps

1 Which type of savings account do you want to create ?
↓ Continue to next step

Step 1 is taken without conditions

Assistant says

Which type of savings account do you want to create ?

Define customer response

System Options Confirmation Regex Number Date

Options

Enable customers to select from a set of choices. If more than 4, options show as a list.

As buttons

Checking Savings 401 (k) Roth IRA

As a list

Pay Bill

New step +

Preview

TBM Watson Assistant Lite Upgrade Banking Chatbot Learning center ?

Savings

Customer starts with: Savings

Conversation steps

1 Which type of savings account do you want to create ?
↓ Continue to next step

Edit response

Type: Option Add synonyms +

Option 1

Regular Savings Account

Option 2

Kids Savings Account

Option 3

Zero Balance Savings Account

Option 4

Cancel Apply

New step +

Preview

WITH CONDITION:

The screenshot displays the IBM Watson Assistant interface for a chatbot named "Savings". The interface is divided into several sections:

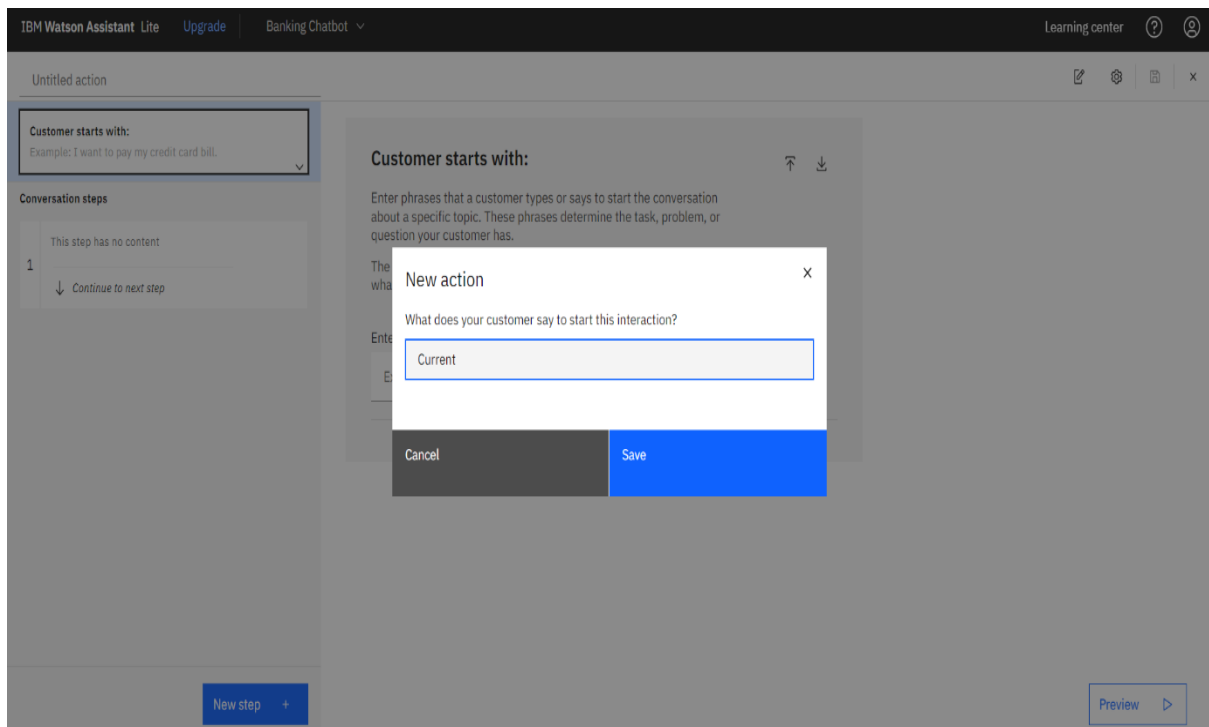
- Header:** Includes "IBM Watson Assistant Life Upgrade", "Banking Chatbot", and "Learning center" links.
- Assistant says:** Shows the chatbot's responses and the user's input. The chatbot asks, "Which type of savings account do you want to create?" and provides options: "Zero Balance...", "Regular Savi...", and "+1". The user selects "Kids Savings Account". The chatbot then says, "Awesome ! Please take the following documents and head towards the nearest branch." and lists the required documents: "1.Aadhar Card", "2.Pan Card", and "3.Passport size photos".
- And then:** Shows the chatbot's next steps. It includes a "Go to another action" button and a "Goes to action" section with "End" as the action. It also shows "Pass values" and "Upon return" options.
- Preview:** A preview of the chatbot's interaction with a user. It shows the chatbot asking for the account type, the user selecting "Kids Savings Account", and the chatbot providing the list of documents. The preview also shows the chatbot's response to the user's input.

PREVIEW:

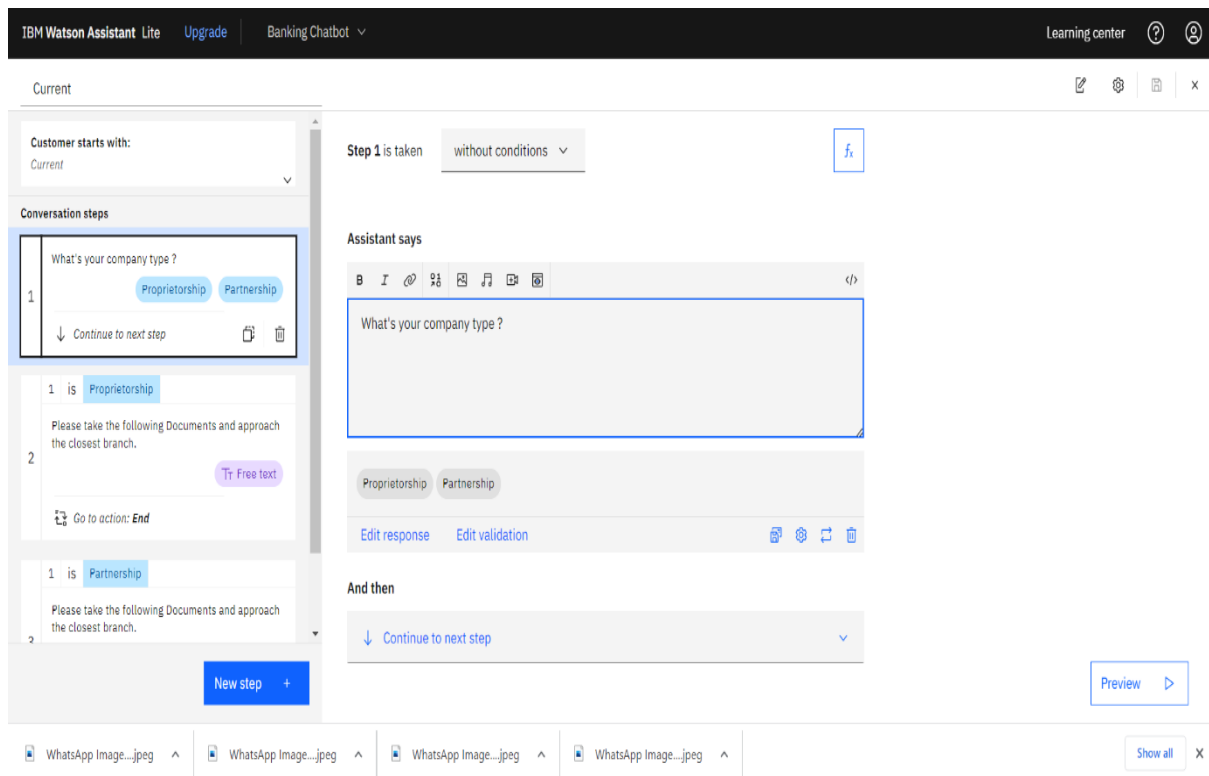
The preview shows the chatbot's interaction with a user. The chatbot asks, "Which type of savings account do you want to create?" and provides three options: "Regular Savings Account", "Kids Savings Account", and "Zero Balance Savings Account". The user selects "Zero Balance Savings Account". The chatbot then says, "Awesome ! Please take the following documents and head towards the nearest branch." and lists the required documents: "1.Aadhar Card", "2.Pan Card", and "3.Passport size photos". The preview also shows the chatbot's response to the user's input.

CREATING CURRENT ACCOUNT RELATED ACTION:

- The user can choose the type of company to know the information on the documents to be submitted for creating current accounts. To get details on procedure to close my current account.



ACTION:



WITH CONDITION:

The screenshot displays the IBM Watson Assistant interface for a 'Banking Chatbot'. The top navigation bar includes 'IBM Watson Assistant Life', 'Upgrade', 'Banking Chatbot', and a 'Learning center' link. The main workspace is divided into three panels:

- Left Panel (Conversation steps):** Shows a sequence of steps. Step 1 asks 'What's your company type?' with buttons for 'Proprietorship' and 'Partnership'. Step 2, triggered by 'Proprietorship', asks the user to provide documents. Step 3, triggered by 'Partnership', also asks for documents. A 'New step +' button is at the bottom.
- Center Panel (Conditions):** Shows a condition group with one condition: 'If All of this is true: 1. What's your comp... is Partnership'. It includes options to 'Add condition +', 'New condition group +', 'Edit response', and 'Edit validation'.
- Right Panel (Assistant says):** Shows the assistant's response for the 'Partnership' condition: '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'. It also shows a user input bubble: 'User enters free text'.

A 'Preview' button is located at the bottom right of the interface.

PREVIEW:

The screenshot shows a 'Preview' window of the chatbot interface. It features a title bar with 'Preview' and a refresh icon. The chat area displays a simulated conversation:

- The chatbot asks: 'What's your company type ?' with buttons for 'Proprietorship' and 'Partnership'.
- The user selects 'Proprietorship'.
- The chatbot responds: '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'.
- The user responds with 'thanks'.

At the bottom, there is a text input field labeled 'Type something...' and a send button.