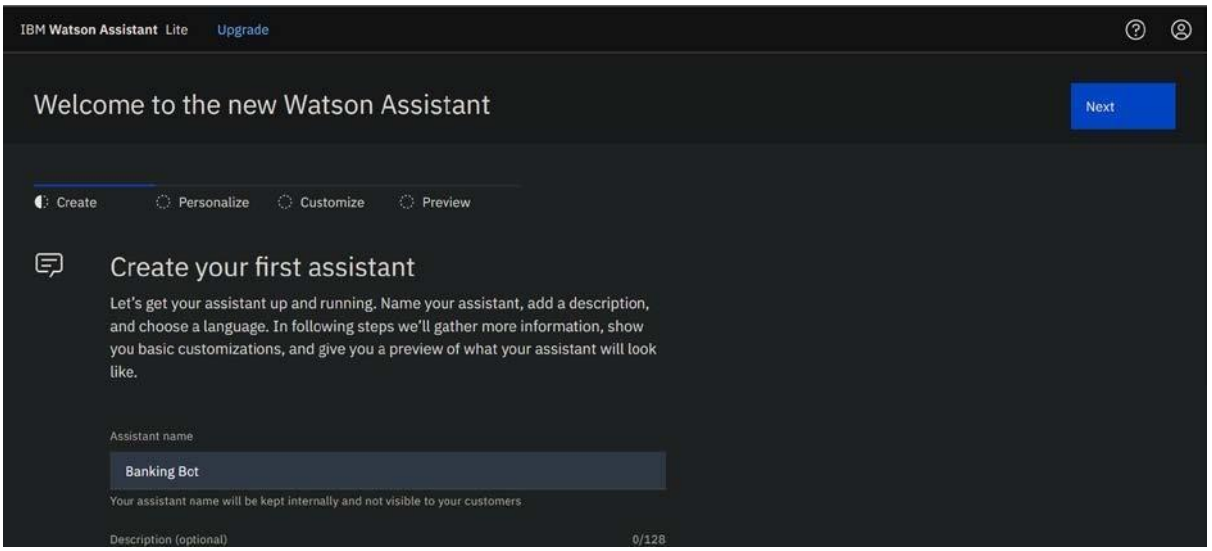
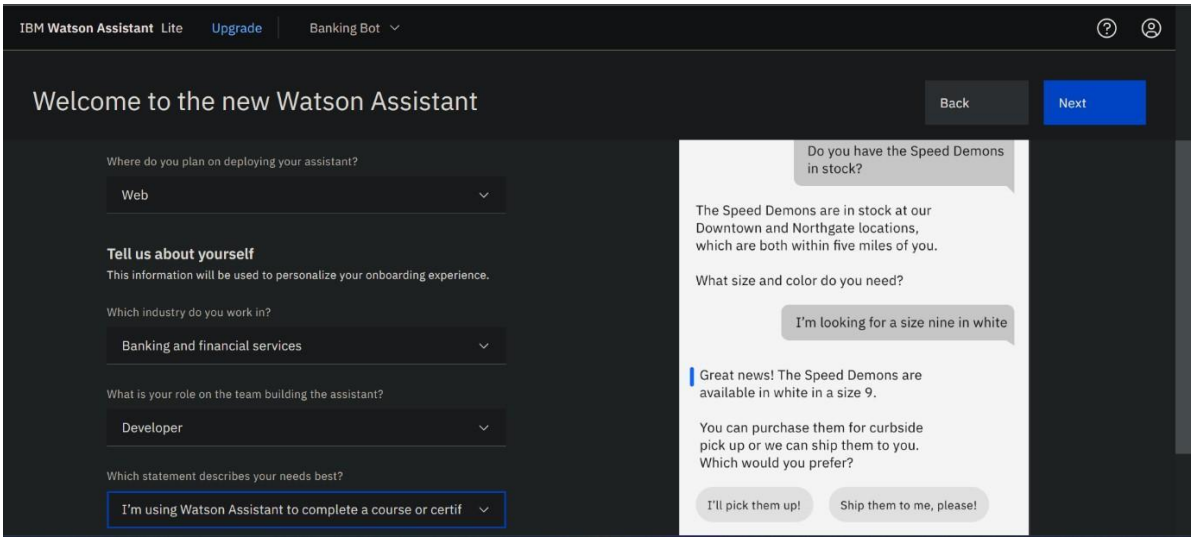
# Project Development Phase
## Sprint 1

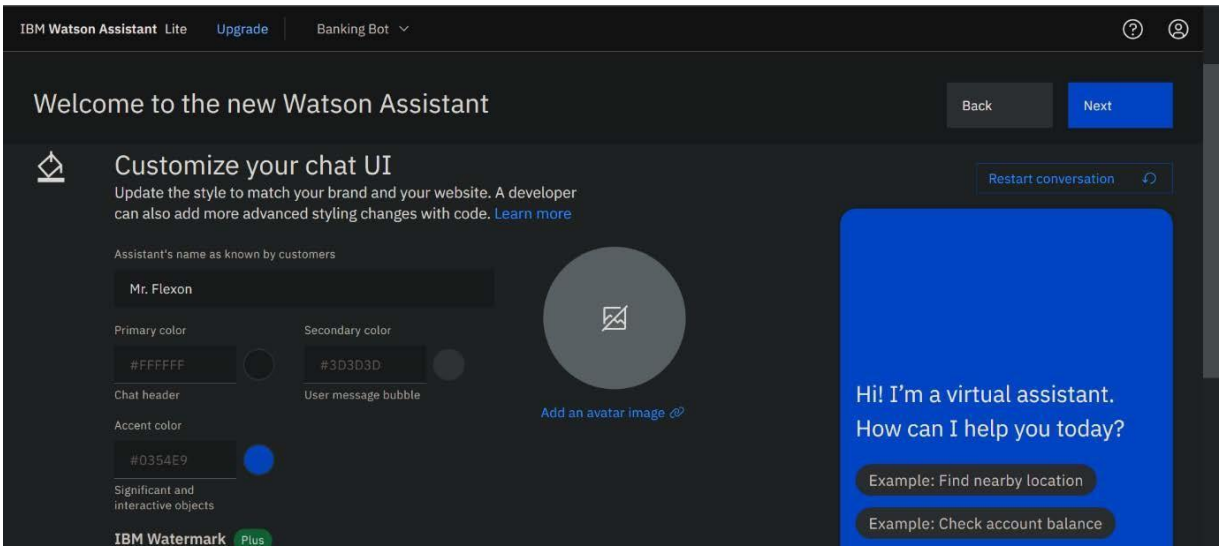
| | |
|---|---|
| Team ID | PNT2022TMID10567 |
| Project Name | AI BASED DISCOURSE FOR BANKING INDUSTRY |

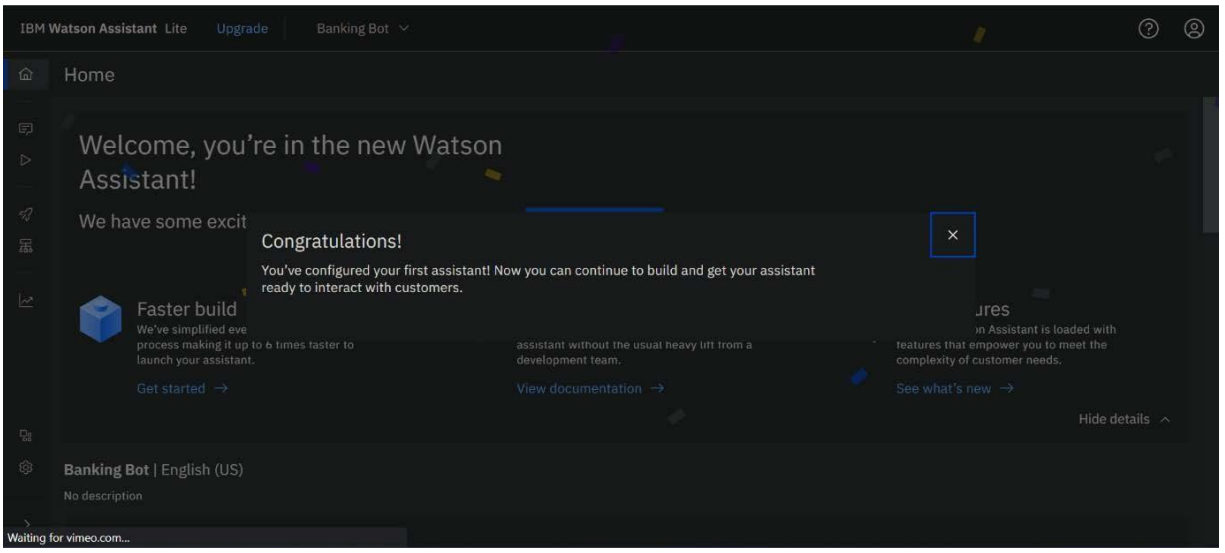
### Screenshots of Sprint 1 Tasks:

#### Create IBM Watson Assistant Service:

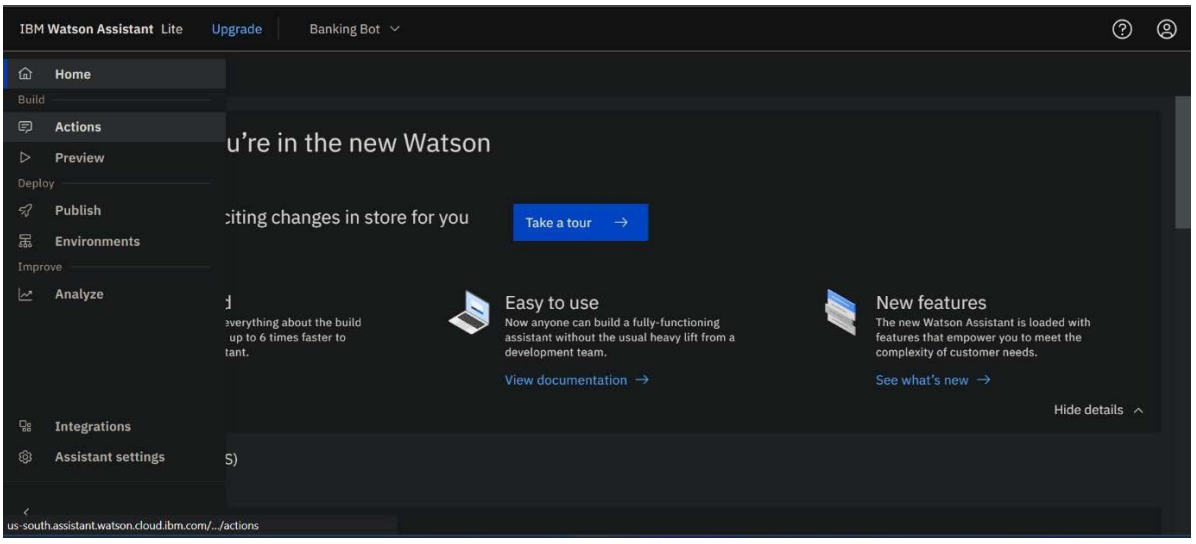


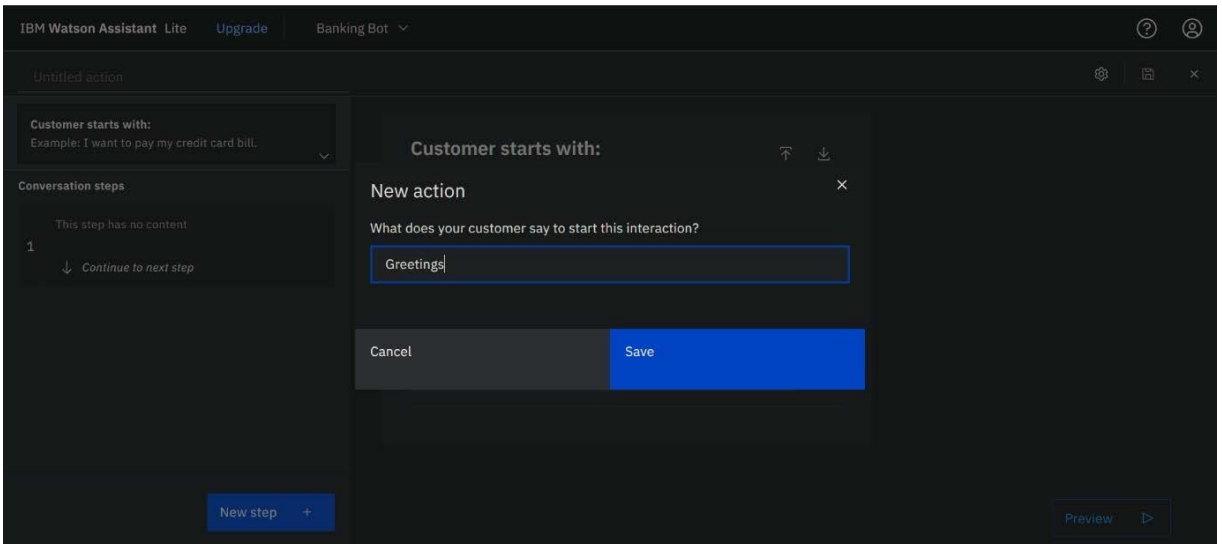



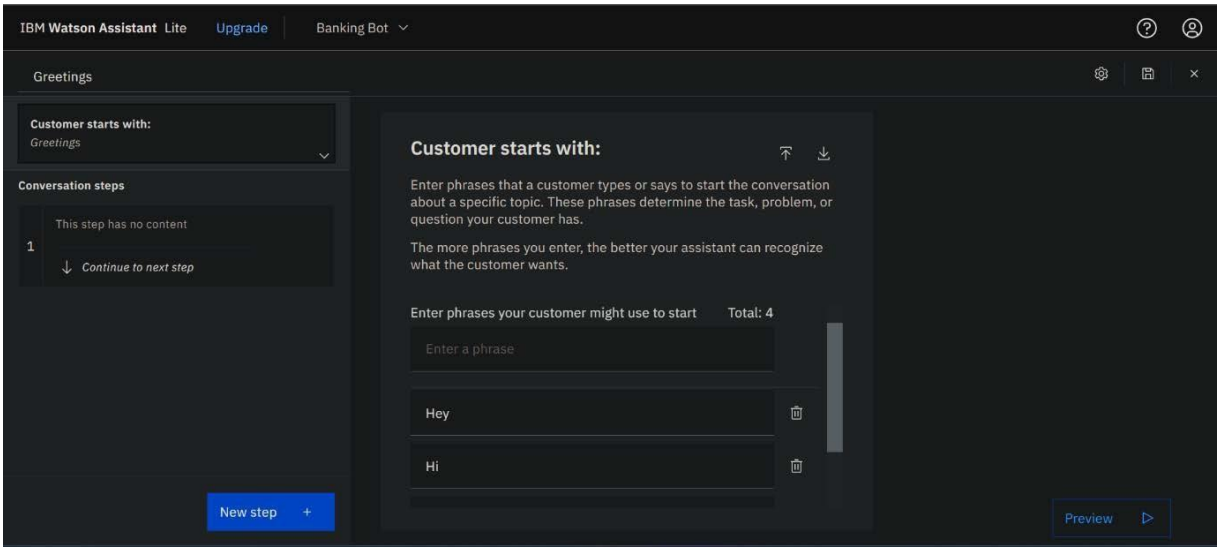


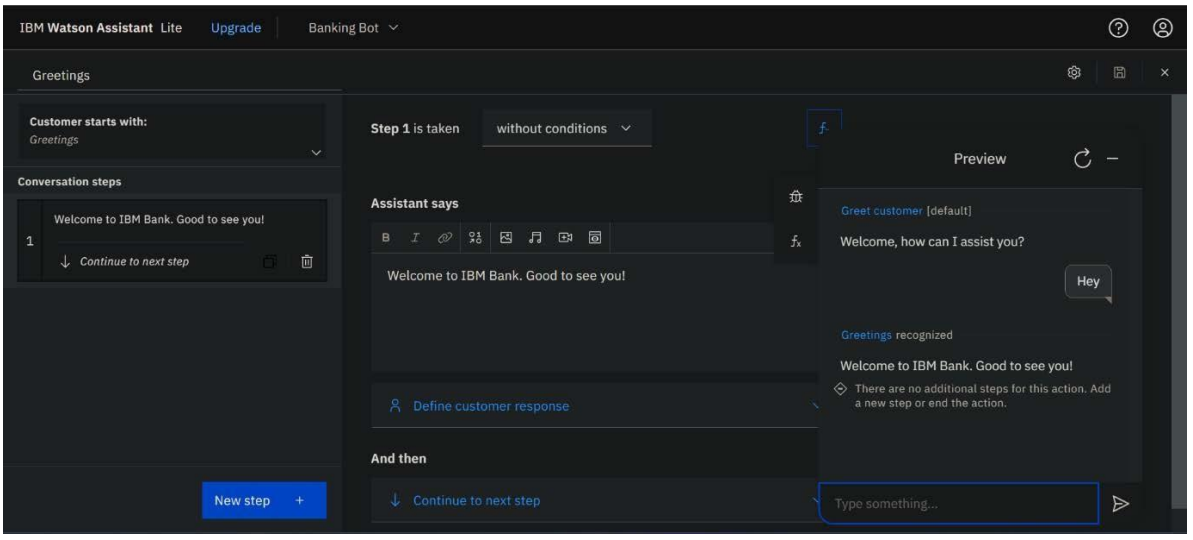



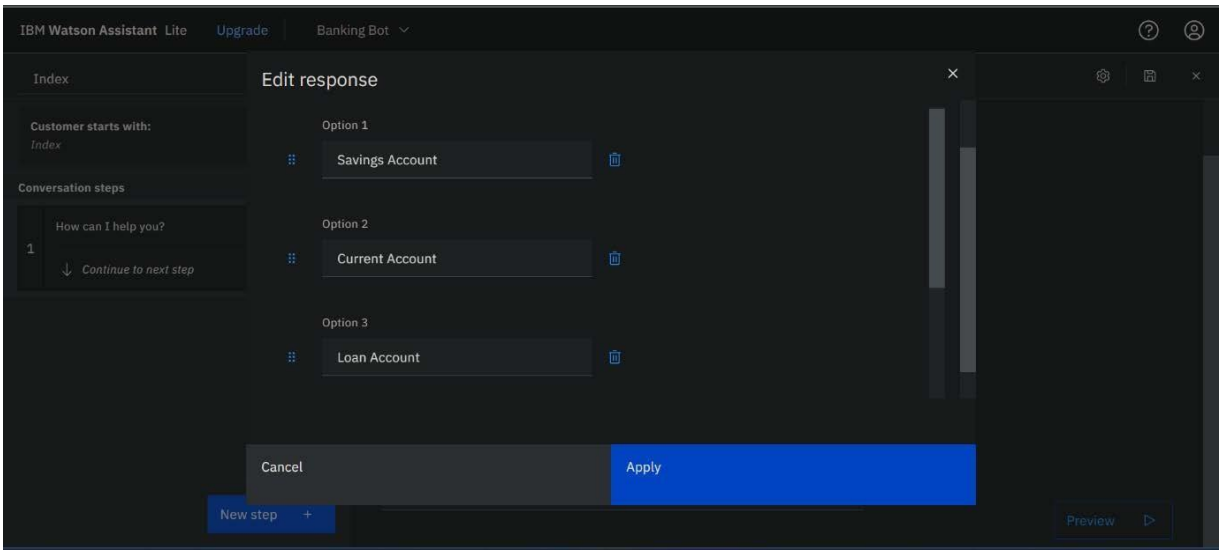

**Chatbot Skills Creation:**

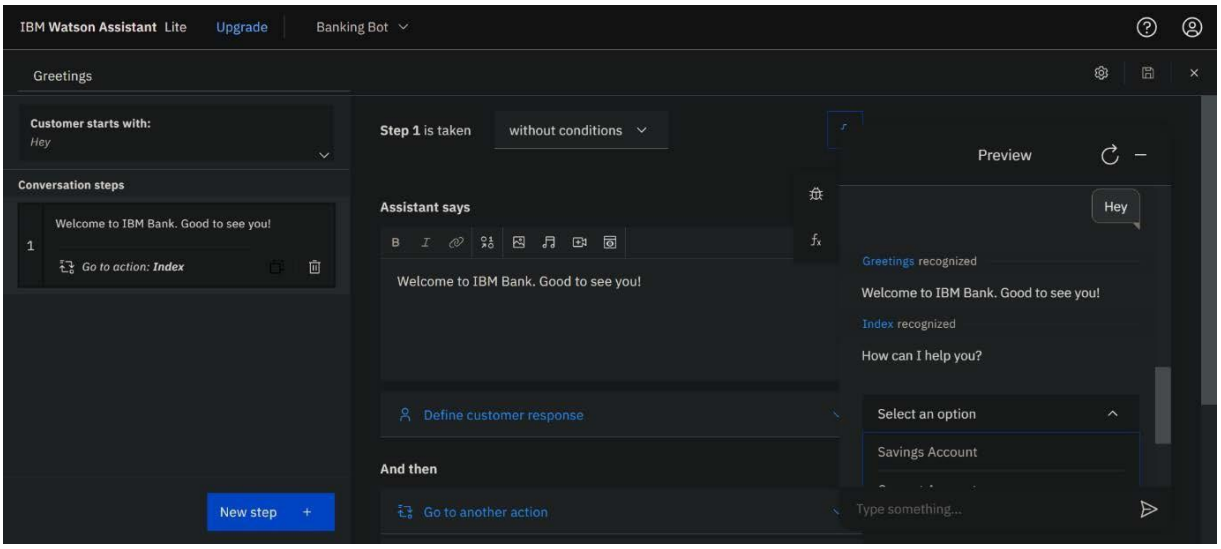


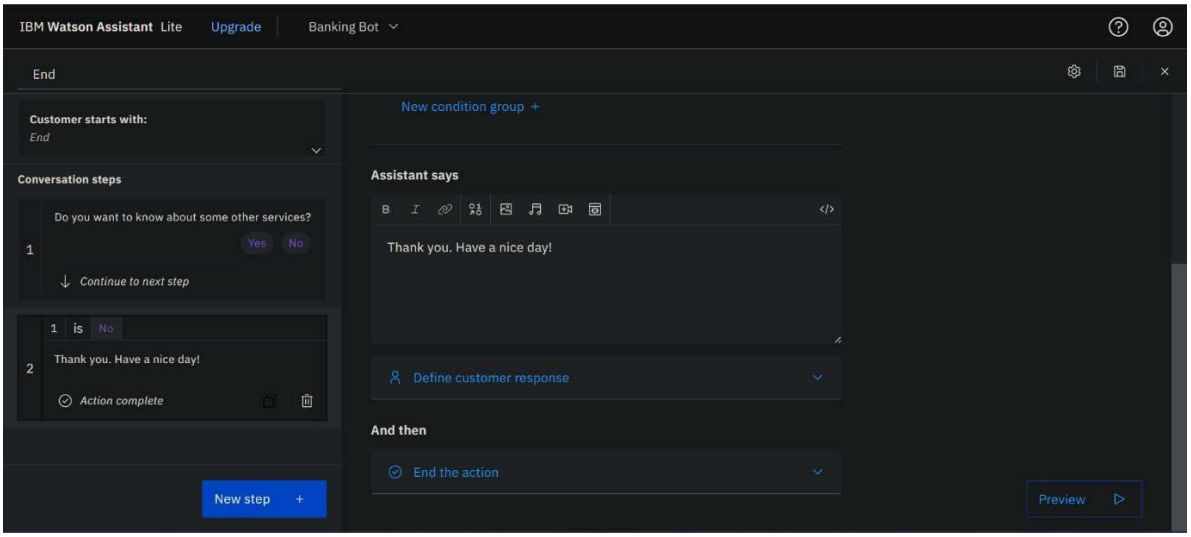

IBM Watson Assistant Lite
Upgrade
Banking Bot
Untitled action
Customer starts with:
Example: I want to pay my credit card bill.
Conversation steps
This step has no content
1
Continue to next step
New step
Customer starts with:
New action
What does your customer say to start this interaction?
Greetings
Cancel
Save
Preview


IBM Watson Assistant Lite
Upgrade
Banking Bot
Greetings
Customer starts with:
Greetings
Conversation steps
This step has no content
1
Continue to next step
New 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
Total: 4
Enter a phrase
Hey
Hi
Preview

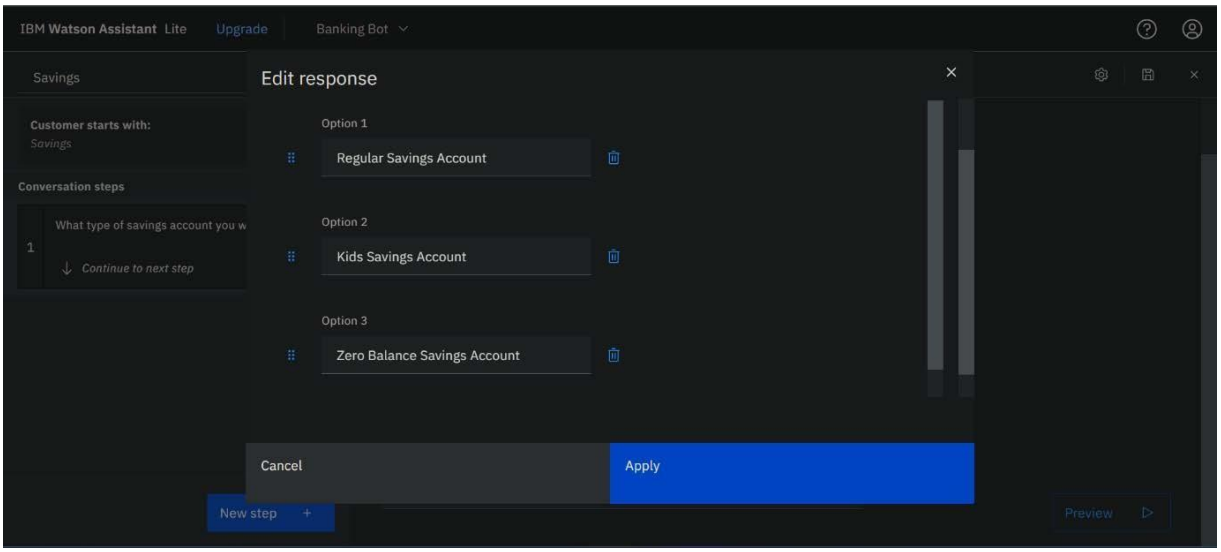

IBM Watson Assistant Lite
Upgrade
Banking Bot
Greetings
Customer starts with:
Greetings
Conversation steps
Welcome to IBM Bank. Good to see you!
1
Continue to next step
New step
Step 1 is taken
without conditions
Assistant says
Welcome to IBM Bank. Good to see you!
Define customer response
And then
Continue to next step
Preview
Greet customer [default]
Welcome, how can I assist you?
Hey
Greetings recognized
Welcome to IBM Bank. Good to see you!
There are no additional steps for this action. Add a new step or end the action.
Type something...

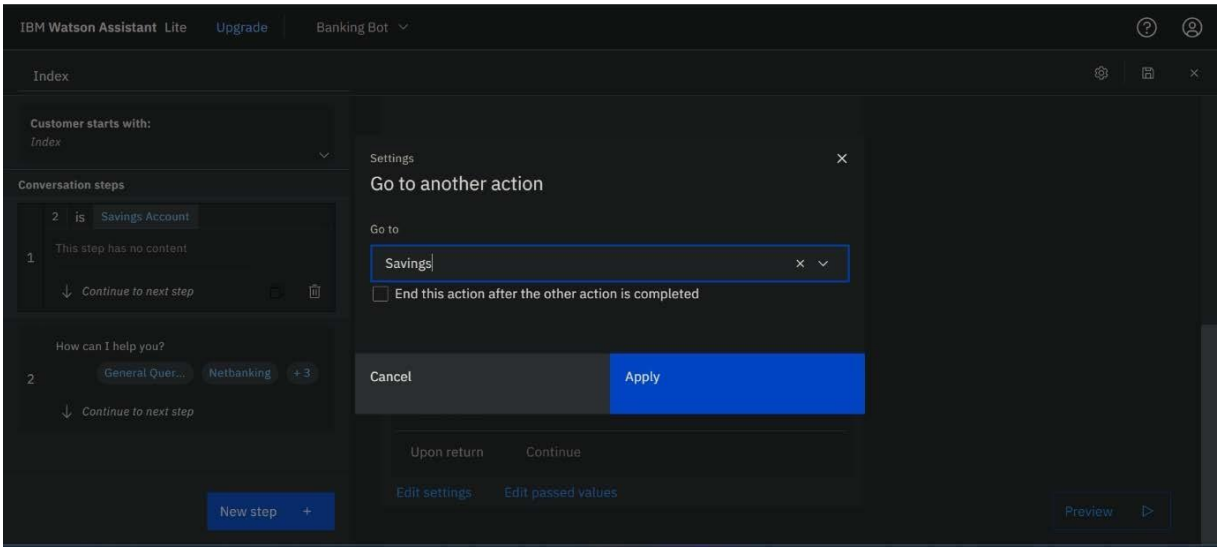

IBM Watson Assistant Lite
Upgrade
Banking Bot
Index
Edit response
Customer starts with:
Index
Conversation steps
How can I help you?
Continue to next step
Option 1
Savings Account
Option 2
Current Account
Option 3
Loan Account
Cancel
Apply
New step
Preview

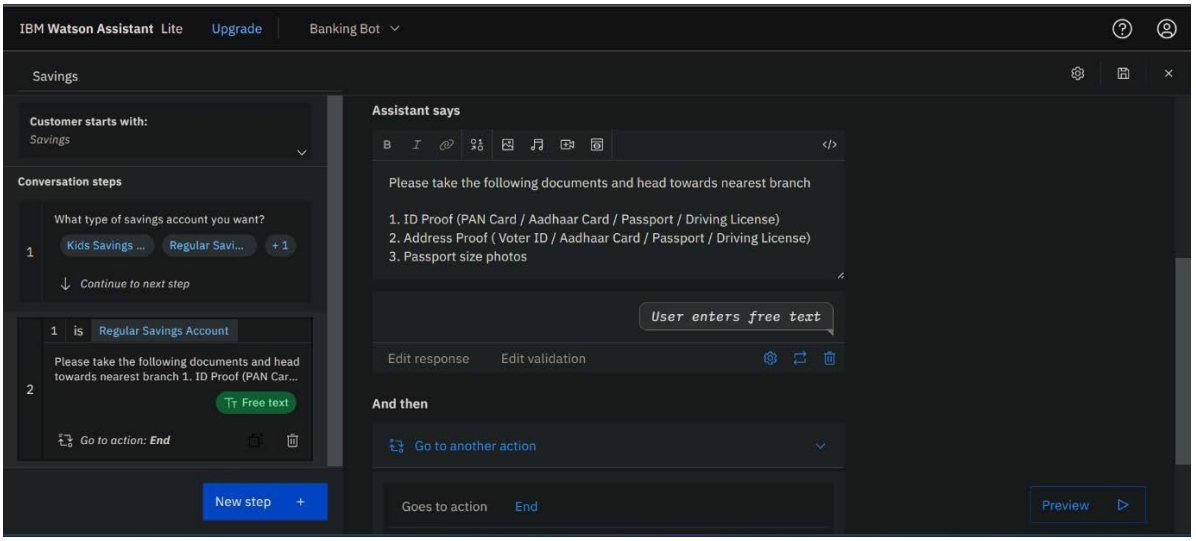

IBM Watson Assistant Lite
Upgrade
Banking Bot
Greetings
Customer starts with:
Hey
Conversation steps
Welcome to IBM Bank. Good to see you!
Go to action: Index
Step 1 is taken
without conditions
Assistant says
Welcome to IBM Bank. Good to see you!
Define customer response
And then
Go to another action
New step
Preview
Hey
Greetings recognized
Welcome to IBM Bank. Good to see you!
Index recognized
How can I help you?
Select an option
Savings Account
Type something...

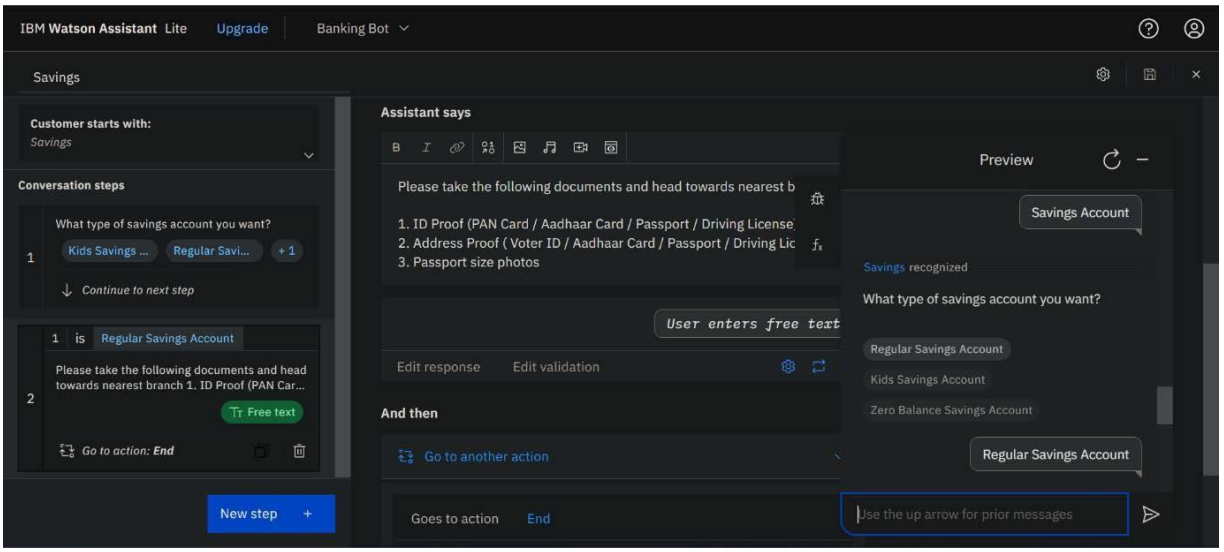

IBM Watson Assistant Lite
Upgrade
Banking Bot
End
Customer starts with:
End
Conversation steps
Do you want to know about some other services?
Yes
No
Continue to next step
1 is No
Thank you. Have a nice day!
Action complete
New condition group +
Assistant says
Thank you. Have a nice day!
Define customer response
And then
End the action
New step
Preview

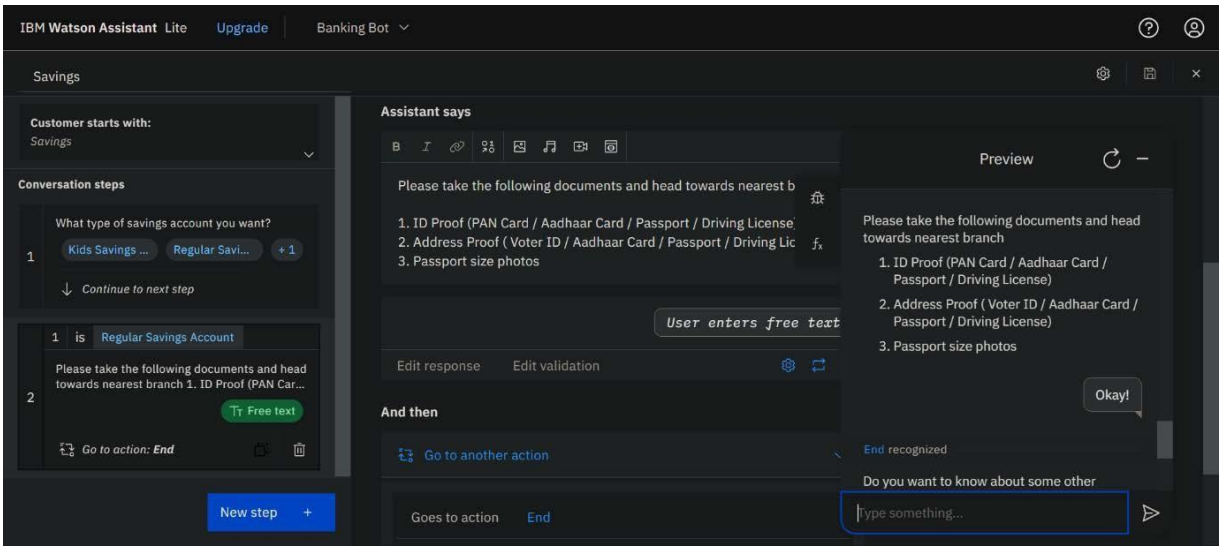
## Creating Savings Account Action:

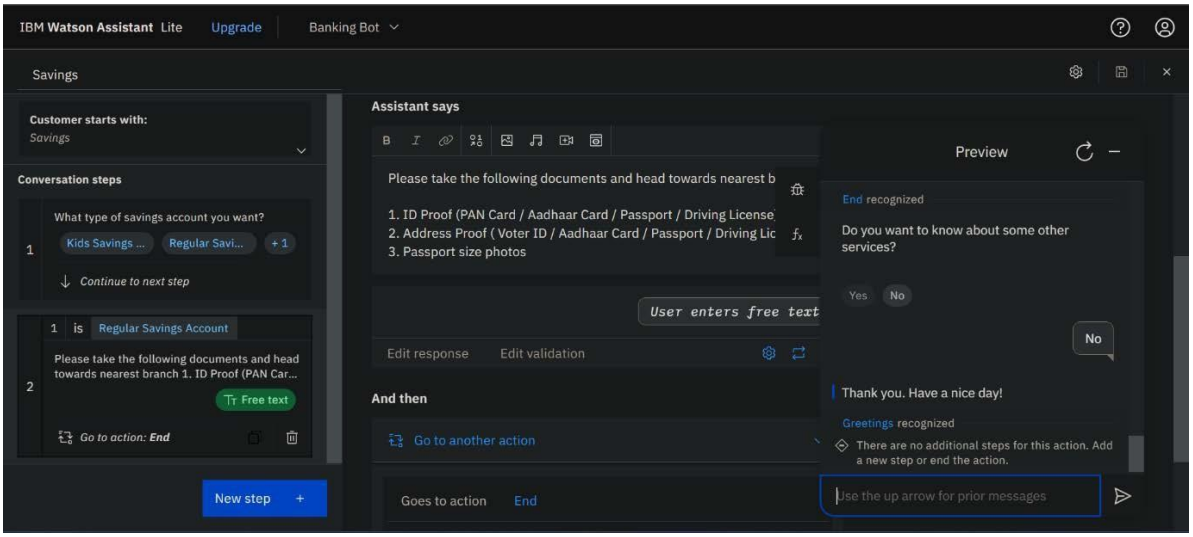


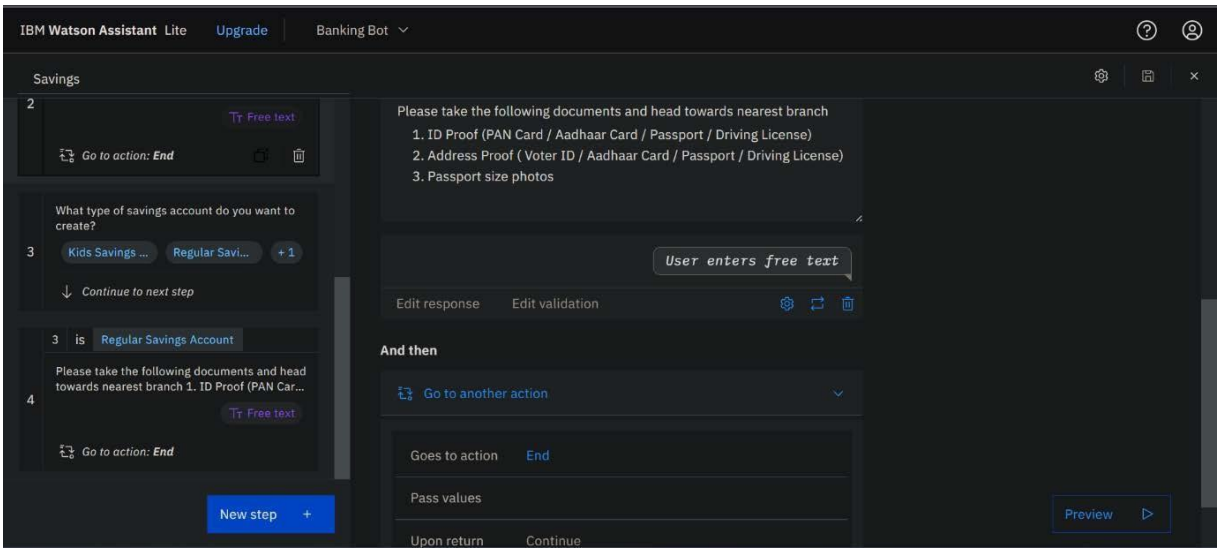



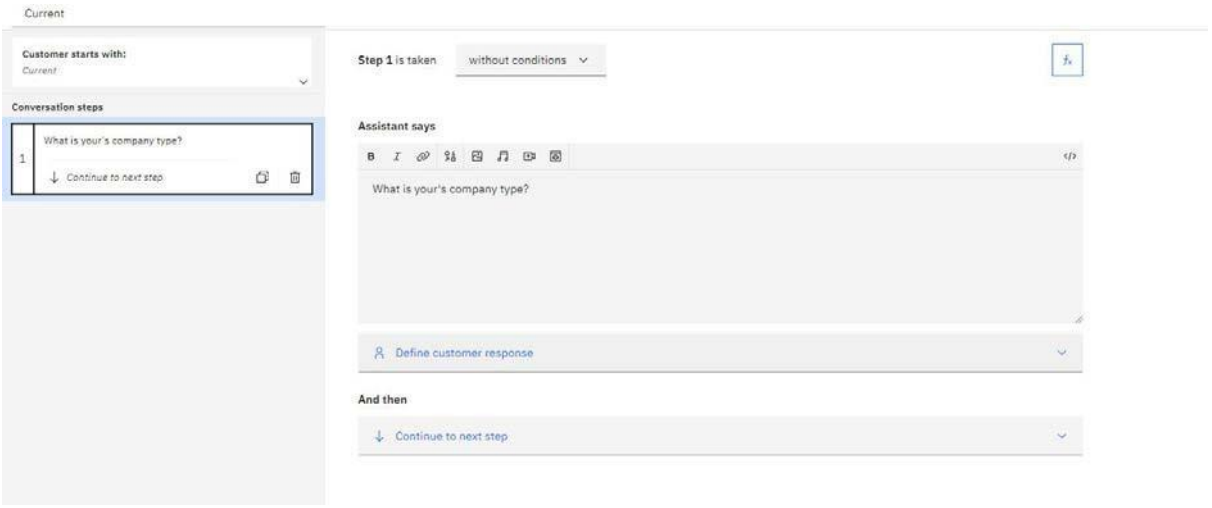

IBM Watson Assistant Lite
Upgrade
Banking Bot
Savings
Customer starts with:
Savings
Conversation steps
What type of savings account you want?
Kids Savings ...
Regular Savi...
+ 1
Continue to next step
1 is Regular Savings Account
Please take the following documents and head towards nearest branch 1. ID Proof (PAN Car...
Free text
Go to action: End
New step
Assistant says
Please take the following documents and head towards nearest b
1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License
2. Address Proof ( Voter ID / Aadhaar Card / Passport / Driving Lic
3. Passport size photos
User enters free text
Edit response
Edit validation
And then
Go to another action
Goes to action
End
Preview
Savings Account
Savings recognized
What type of savings account you want?
Regular Savings Account
Kids Savings Account
Zero Balance Savings Account
Regular Savings Account
Use the up arrow for prior messages

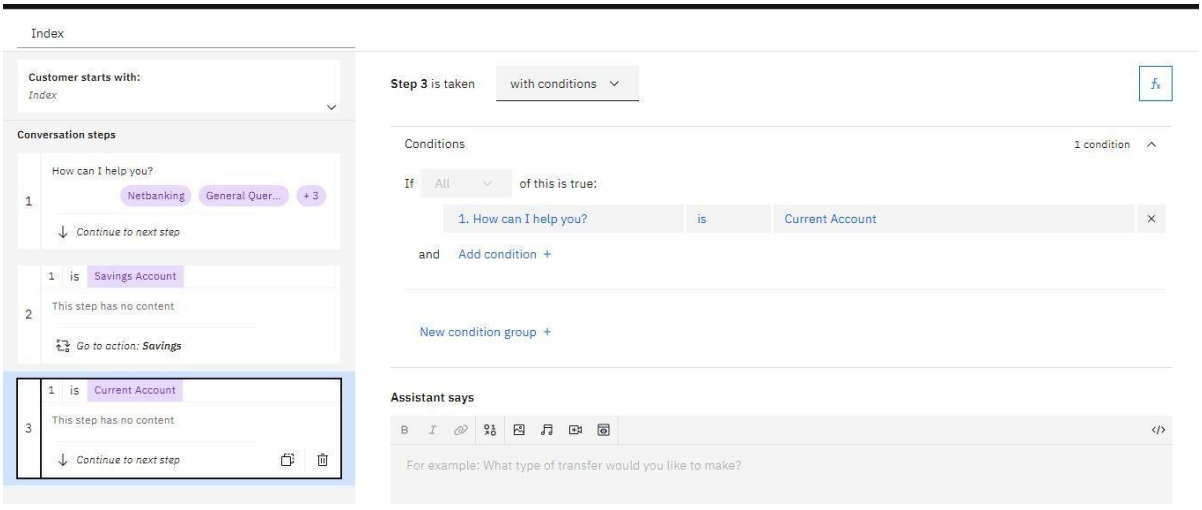

IBM Watson Assistant Lite
Upgrade
Banking Bot
Savings
Customer starts with:
Savings
Conversation steps
What type of savings account you want?
Kids Savings ...
Regular Savi...
+ 1
Continue to next step
1 is Regular Savings Account
Please take the following documents and head towards nearest branch 1. ID Proof (PAN Car...
Free text
Go to action: End
New step
Assistant says
Please take the following documents and head towards nearest b
1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License
2. Address Proof ( Voter ID / Aadhaar Card / Passport / Driving Lic
3. Passport size photos
User enters free text
Edit response
Edit validation
And then
Go to another action
Goes to action
End
Preview
Please take the following documents and head towards nearest branch
1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License)
2. Address Proof ( Voter ID / Aadhaar Card / Passport / Driving License)
3. Passport size photos
Okay!
End recognized
Do you want to know about some other
Type something...

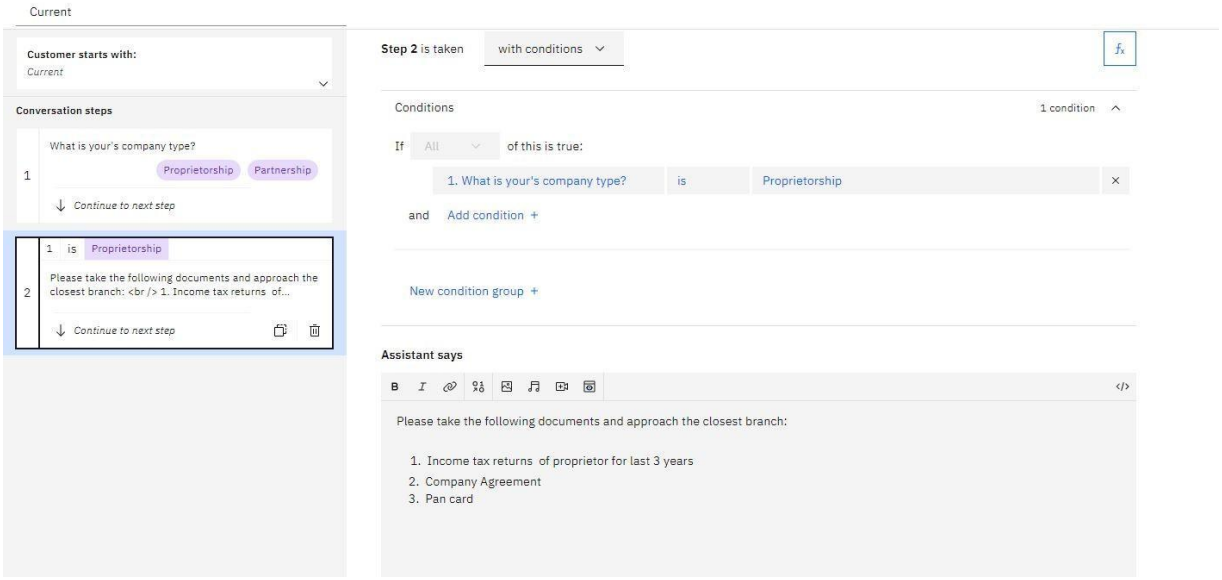

IBM Watson Assistant Lite
Upgrade
Banking Bot
Savings
Customer starts with:
Savings
Conversation steps
What type of savings account you want?
Kids Savings ...
Regular Savi...
+ 1
Continue to next step
1 is Regular Savings Account
Please take the following documents and head towards nearest branch 1. ID Proof (PAN Car...
Free text
Go to action: End
New step
Assistant says
Please take the following documents and head towards nearest b
1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License
2. Address Proof ( Voter ID / Aadhaar Card / Passport / Driving Lic
3. Passport size photos
User enters free text
Edit response
Edit validation
And then
Go to another action
Goes to action
End
Preview
End recognized
Do you want to know about some other services?
Yes
No
No
Thank you. Have a nice day!
Greetings recognized
There are no additional steps for this action. Add a new step or end the action.
Use the up arrow for prior messages

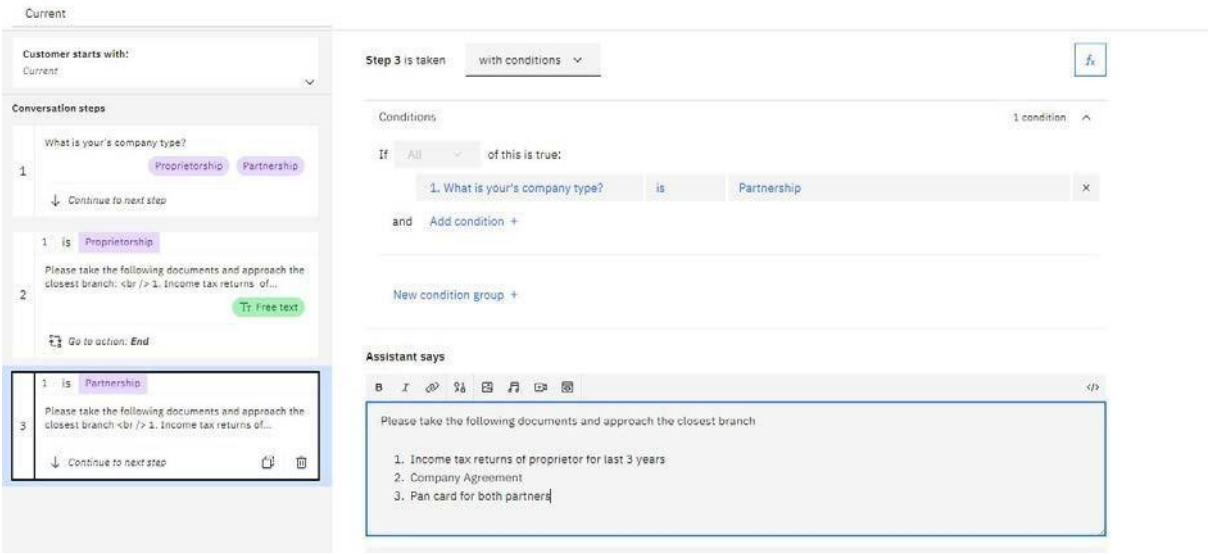


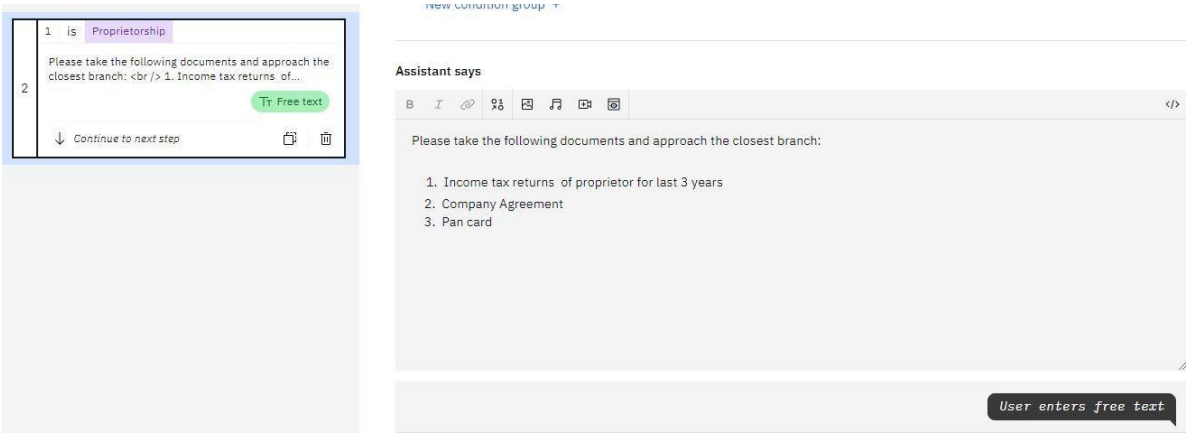

Creating Current Account Action:

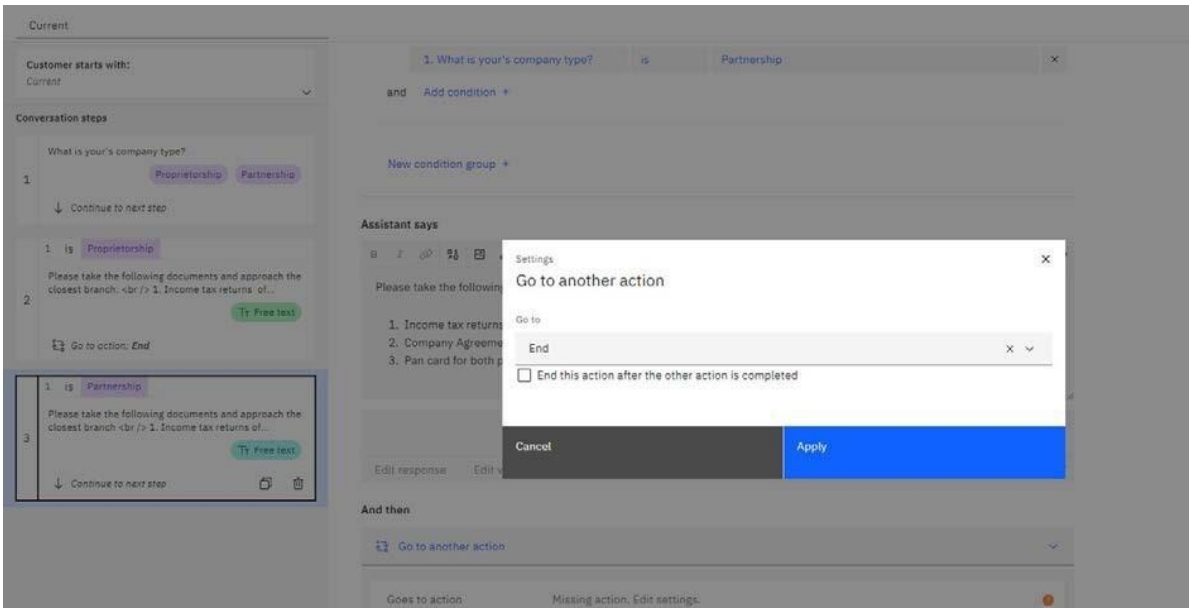



Current
Customer starts with:
Current
Conversation steps
1
What is your's company type?
Proprietorship
Partnership
Continue to next step
2
1 is Proprietorship
Please take the following documents and approach the closest branch: <br /> 1. Income tax returns of...
Continue to next step
Step 2 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. What is your's company type?
is
Proprietorship
and
Add condition +
New condition group +
Assistant says
Please take the following documents and approach the closest branch:
1. Income tax returns of proprietor for last 3 years
2. Company Agreement
3. Pan card


Current
Customer starts with:
Current
Conversation steps
1
What is your's company type?
Proprietorship
Partnership
Continue to next step
2
1 is Proprietorship
Please take the following documents and approach the closest branch: <br /> 1. Income tax returns of...
Free text
Go to action: End
3
1 is Partnership
Please take the following documents and approach the closest branch <br /> 1. Income tax returns of...
Continue to next step
Step 3 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. What is your's company type?
is
Partnership
and
Add condition +
New condition group +
Assistant says
Please take the following documents and approach the closest branch
1. Income tax returns of proprietor for last 3 years
2. Company Agreement
3. Pan card for both partners


2
1 is Proprietorship
Please take the following documents and approach the closest branch: <br /> 1. Income tax returns of...
Free text
Continue to next step
Assistant says
Please take the following documents and approach the closest branch:
1. Income tax returns of proprietor for last 3 years
2. Company Agreement
3. Pan card
User enters free text


Current
Customer starts with:
Current
Conversation steps
1
What is your's company type?
Proprietorship
Partnership
Continue to next step
2
1 is Proprietorship
Please take the following documents and approach the closest branch: <br /> 1. Income tax returns of...
Try Free text
Go to action: End
3
1 is Partnership
Please take the following documents and approach the closest branch <br /> 1. Income tax returns of...
Try Free text
Continue to next step
1. What is your's company type?
is
Partnership
and
Add condition +
New condition group +
Assistant says
Please take the following
1. Income tax returns
2. Company Agreeme
3. Pan card for both p
Edit response
Settings
Go to another action
Go to
End
End this action after the other action is completed
Cancel
Apply
And then
Go to another action
Goes to action
Missing action. Edit settings.