

Sprint – 2

Project Development Phase

Team ID	PNT2022TMID07727
Project Name	Project – AI Based Discourse For Banking Industry

Open Watson Assistant

The screenshot shows the IBM Watson Assistant Lite interface for a project named 'Banking Chatbot'. The top navigation bar includes 'IBM Watson Assistant Lite', an 'Upgrade' button, and a dropdown menu for 'Banking Chatbot'. The main content area is divided into two sections: 'Task tracker' and 'Live assistant status'.

Task tracker: This section displays three tasks with progress bars and completion percentages.

Task	Steps Left	Time	Progress
Enhance your assistant	5 steps left	10 min	16%
Test and refine your assistant	4 steps left	8 min	0%
Deploy your assistant	3 steps left	9 min	25%

Live assistant status: This section shows the 'Channels' configuration. It includes a 'Channels' header with an information icon, a 'Web chat' button with a chat icon, and a large blue circular logo with radiating lines.

Create “Actions” for dialog conversations

IBM Watson Assistant LiteUpgradeBanking Chatbot

Actions

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

Name	Last edited	Status
Query	12 days ago	✓
Credit Card	10 days ago	✓
Start	10 days ago	✓

Actions

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

Name	Last edited	Status
Current	10 days ago	✓
Net Banking	10 days ago	✓
End	13 days ago	✓

IBM Watson Assistant LiteUpgradeBanking Chatbot

Actions

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

Name	Last edited	Status
Net Banking	10 days ago	✓
End	13 days ago	✓
Savings	10 days ago	✓
Loan	10 days ago	✓
Queries?	10 days ago	✓
Change Personal Details	10 days ago	✓

Items per page: 50

Showing 1–10 of 10 actions

1

Give contents and responses for “Start” action:

IBM Watson Assistant Lite Upgrade Banking Chatbot

Start

Customer starts with:
start

Conversation steps

1

Hey there! Delighted to make your acquaintance.

Go to action: Queries?

New step

B I @ % ☒ 🎵 📺 📷

Hey there! Delighted to make your acquaintance.

Define customer response

And then

Go to another action

Goes to action Queries?

Pass values

Upon return Continue

Edit settings Edit passed values

Give contents, responses for “Queries” action:

IBM Watson Assistant Lite Upgrade Banking Chatbot

Queries?

Customer starts with: Index

Conversation steps

- 1 How can I help you?
General Query Net Banking + 5
Continue to next step
- 1 is General Query
This step has no content
Go to action: Query
- 1 is Loan Enquiry
This step has no content
Go to action: Loan

New step +

Step 1 is taken without conditions

Assistant says

How can I help you?

Choose an option

Edit response Edit validation

And then

Continue to next step

Give contents, responses for “End” action:

IBM Watson Assistant Lite Upgrade Banking Chatbot

End

Customer starts with: End

Conversation steps

- 1 Do you have some other queries?
Yes No
Continue to next step
- 1 is No
Thank you. Have a nice day.
Action complete
- 1 is Yes
This step has no content
Go to action: Queries?

New step +

Step 1 is taken without conditions

Assistant says

Do you have some other queries?

Yes No

Edit response Edit validation

And then

Continue to next step

Give contents, responses for “Savings” action:

The screenshot shows the IBM Watson Assistant interface for the 'Savings' action. The left pane displays a list of steps for three different savings account types: Senior Citizens' Savings Account, Family Savings Account, and Salary Account. Each step includes a 'Go to action: End' button. The right pane shows the response for the 'Salary Account' step, which is a list of documents to be taken to the nearest bank account: Aadhar Card, Pan Card, Passport Size, and Employee ID card. Below the response, there is a 'Define customer response' section and an 'And then' section with a 'Go to another action' dropdown menu.

IBM Watson Assistant Lite Upgrade Banking Chatbot

Savings

1 is Senior Citizens' Savings Account

5 Super. Please take the following documents and approach towards the nearest bank account: 1....

Go to action: End

1 is Family Savings Account

6 Super. Please take the following documents and approach towards the nearest bank account: 1....

Go to action: End

1 is Salary Account

7 Super. Please take the following documents and approach towards the nearest bank account: 1....

Go to action: End

New step +

Super. Please take the following documents and approach towards the nearest bank account:

1. Aadhar Card
2. Pan Card
3. Passport Size
4. Employee ID card

Define customer response

And then

Go to another action

Goes to action End

Pass values

Upon return Continue

Edit settings Edit passed values

Give contents, responses for “Loan” action:

The screenshot shows the IBM Watson Assistant interface for the 'Loan' action. The left pane displays a list of steps for three different loan types: Student loan, Business loan, and Personal loan. Each step includes a 'Go to action: End' button. The right pane shows the response for the 'Personal loan' step, which is a list of documents to be taken to the bank: Aadhar card, Pan card, Passport size photo, School marksheet, and Bank account statements of last 3 months. Below the response, there is a 'Define customer response' section and an 'And then' section with a 'Go to another action' dropdown menu.

IBM Watson Assistant Lite Upgrade Banking Chatbot

Loan

1 is Student loan

6 Please approach to the bank with the following documents: 1. Aadhar card 2. Pan card 3. Passpo...

Go to action: End

1 is Business loan

7 Please approach to the bank with the following documents: 1. Aadhar card 2. Pan card 3. Passpo...

Go to action: End

1 is Personal loan

8 Please approach to the bank with the following documents: 1. Aadhar card 2. Pan card 3. Passpo...

Go to action: End

New step +

Please approach to the bank with the following documents:

1. Aadhar card
2. Pan card
3. Passport size photo
4. School marksheet
5. Bank account statements of last 3 months

Necessary conditions for availing personal loan:

1. Age : 22 to 67 years
2. Employed in a company
3. Monthly salary should be more than 20,000 INR

Define customer response

And then

Go to another action

Goes to action End

Pass values