

## Project Development Phase

### Delivery of Sprint - 2

Date	27 October 2022
Team ID	PNT2022TMID03463
Project Name	AI-based discourse for Banking Industry

Creating savings account action:

IBM Watson Assistant Lite Upgrade Banking assista... Learning center

Savings account

Customer starts with.  
Savings account

Conversation steps

1 Which type of savings account do you want to create?  
Zero balance Regular  
Continue to next st...

1 is Regular  
Please take the following

New step +

Assistant says

Which type of savings account do you want to create?

Regular Zero balance

Edit response Edit validation

Preview

IBM Watson Assistant Lite Upgrade Banking assista... Learning center

Savings account

1 Zero balance Regular  
Continue to next st...

2 1 is Regular  
Please take the following documents and go to the nearest branch:  
Free text

1 is Zero balance  
zero balance

New step +

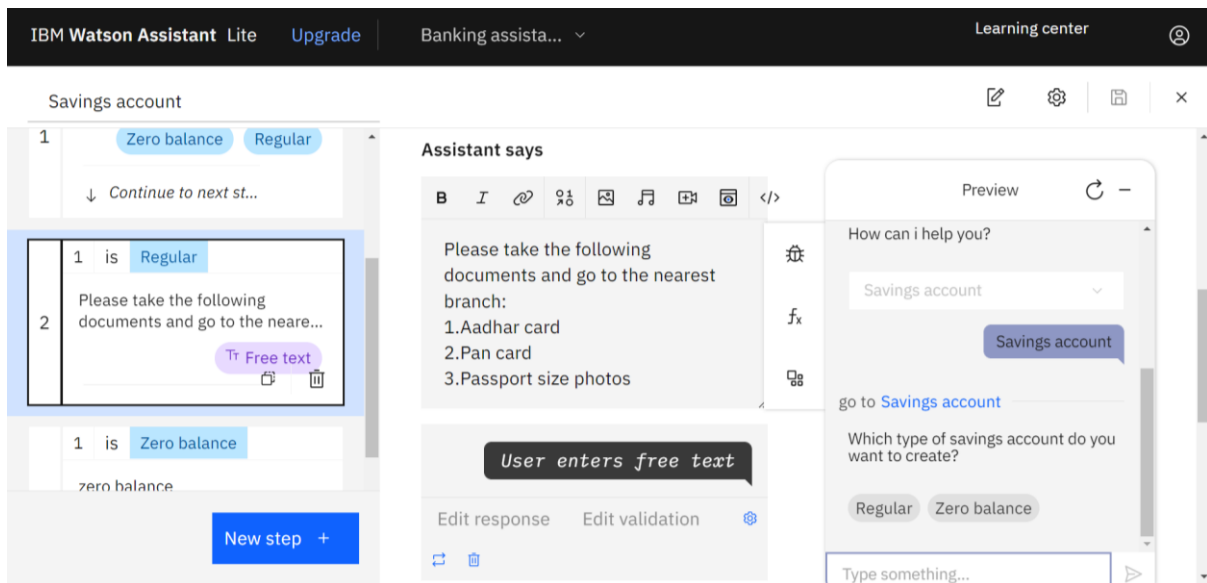
New condition group +

Assistant says

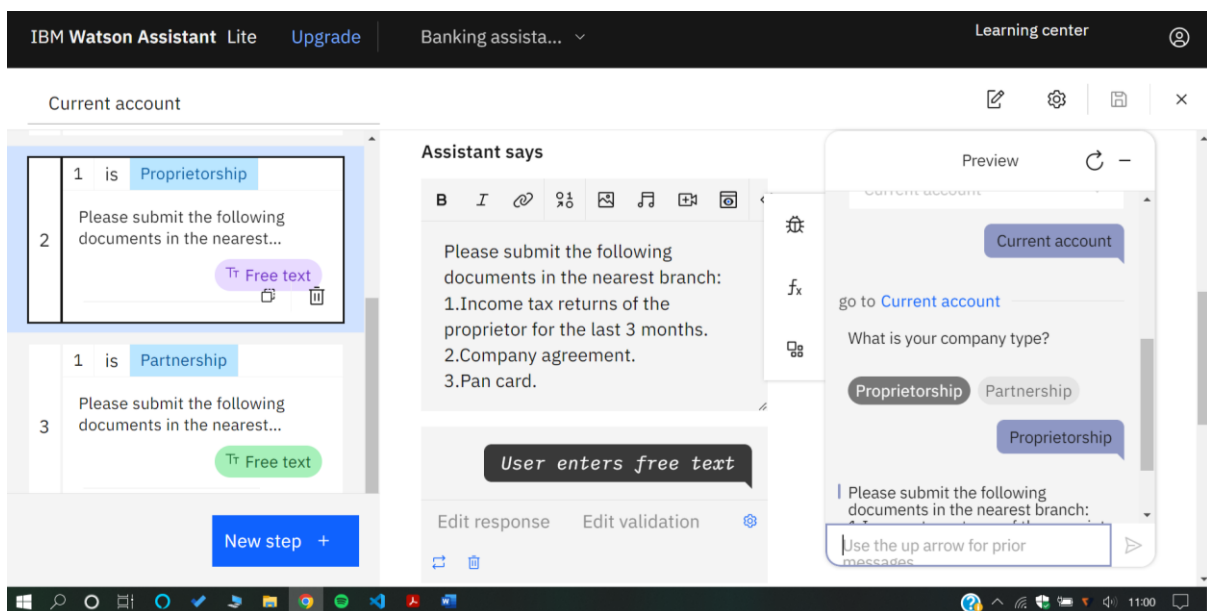
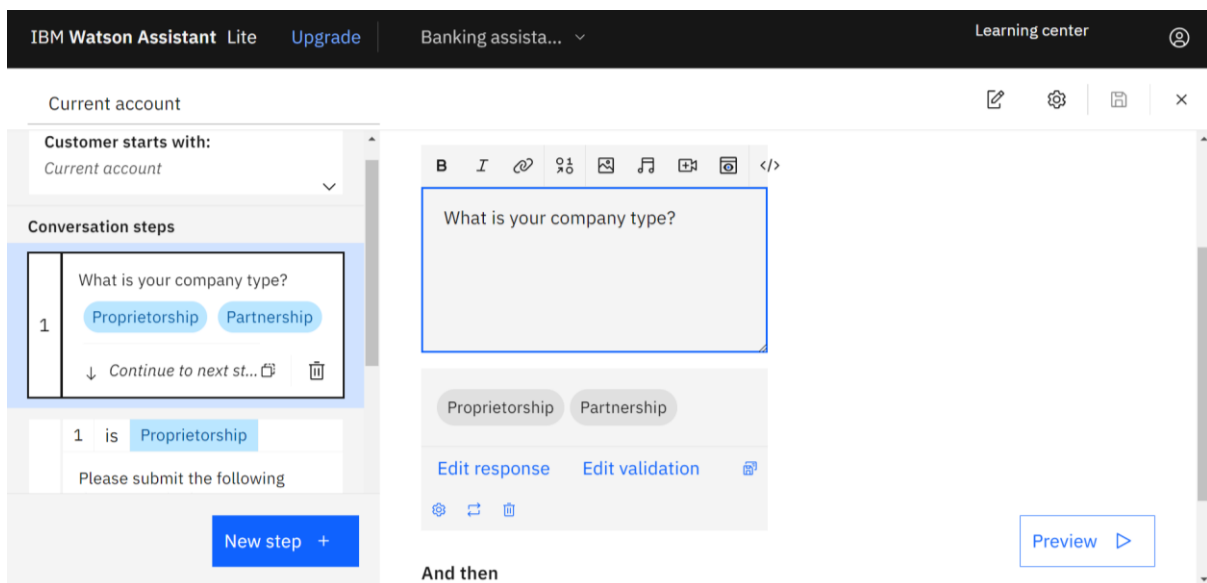
Please take the following documents and go to the nearest branch:  
1.Aadhar card  
2.Pan card  
3.Passport size photos

User enters free text

Preview



Creating current account action:  
Adding two steps in this action with conditions.



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Loan account

Customer starts with.  
Loan account

Conversation steps

1 What type of loan are you looking at?  
Gold Loan Car Loan + 4  
Continue to next st...

1 is Personal Loan  
Personal loan is a short to

New step +

Step 1 is taken without conditions fx

Assistant says

What type of loan are you looking at?

Preview

Creating loan account action:  
Adding steps in this action with condition:

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Loan account

2 medium term unsecured loan...  
Free text

1 is Car Loan

3 Eligibility - Age of the individual must be between 18 years and...  
Free text

1 is Two-Wheeler Loan  
Eligibility - Age of the individual

New step +

with the current employer

- Must be salaried or self-employed, working for a government establishment or a private company

Please take the following documents and approach the nearest branch:

- Aadhaar
- Passport
- Driving license
- Voters ID card
- PAN card

User enters free text

Edit response Edit validation

Preview

IBM Watson Assistant LiteUpgrade

Banking assista... ▾

Learning center

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Loan account

2

medium term unsecured loan...

Free text

1

is

Car Loan

3

Eligibility - Age of the individual must be between 18 years and...

Free text

1

is

Two-Wheeler Loan

Eligibility - Age of the individual

New step +

with the current employer

- Must be salaried or self-employed, working for a government establishment or a private company

Please take the following documents and approach the nearest branch:

- Aadhaar
- Passport
- Driving license
- Voters ID card
- PAN card

User enters free text

Edit response Edit validation ⚙

Preview ↻ -

Loan query

go to [Loan account](#)

What type of loan are you looking at?

Home Loan

Home Loan

Home Loan

Eligibility

- Minimum Age: 18 years and Maximum Age: 70 years

Type something...

**Note:** No code for this project. So, I attached the screenshot and step to build it

