

# Project Development Phase

## AI-based discourse for Banking Industry

TEAM ID: PNT2022TMID30790

### TEAM MEMBERS

ROLE	TEAM MEMBERS NAME	ROLL NO
TEAM LEADER	MURALI. S	(620119104057)
TEAM MEMBER 1	ARUNKUMAR.B	(620119104011)
TEAM MEMBER 2	GOWTHAM.S	(620119104026)
TEAM MEMBER 3	NANDHAKUMAR.K	(620119104059)

## Project Development - Delivery of Sprint-2

Sprint	Functional Requirement (Epic)	User Story Number	User Story / Task	Story Points	Priority	Team Members
Sprint-2	Chatbot Skills	USN- 3	Creating Savings Account Action	7	High	ARUNKUMAR.B
Sprint-2	Chatbot Skills	USN- 4	Creating Current Account Action	7	High	NANDHAKUMAR.K
Sprint-2	Chatbot Skills	USN- 5	Creating Loan Account Action	6	High	MURALI.S

### Delivery

Sprint	Total Story Points	Duration	Sprint Start Date	Sprint End Date (Planned)	Story Points Completed (as on Planned End Date)	Sprint Release Date (Actual)
Sprint-2	20	6 Days	31 Oct 2022	5 Nov 2022	20	5 Nov 2022

## Hardware / Software requirements

### Hardware:

Processor: Intel Pentium

Ram: 512 MB

Storage: 256 MB

### Software:

IBM Watson Assistant, Browser

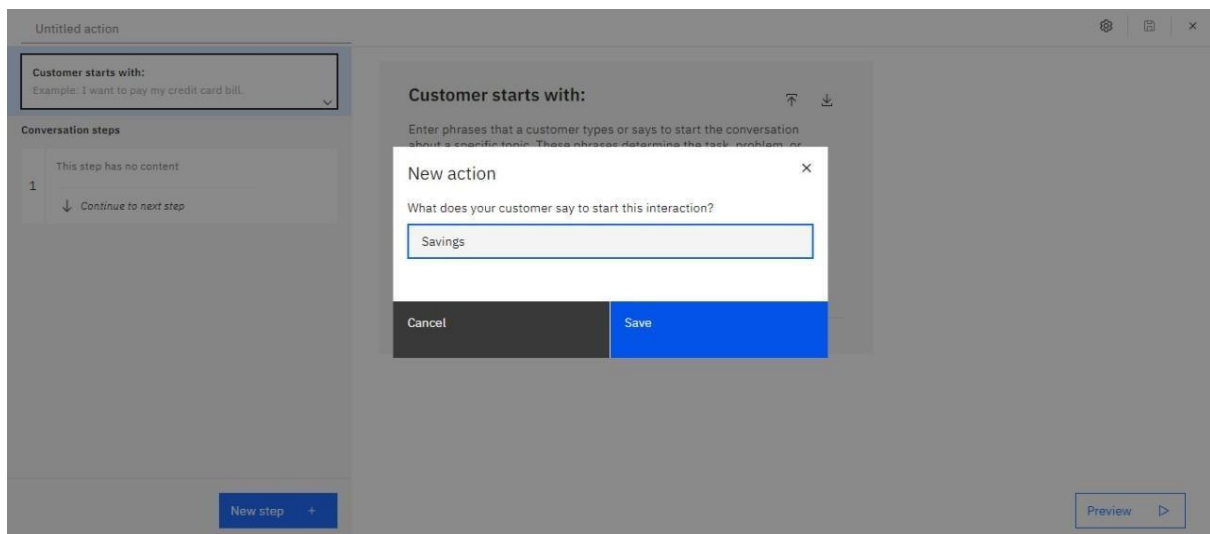
# CREATING SAVINGS ACCOUNT ACTION

**Task assigned:** ARUNKUMAR.B

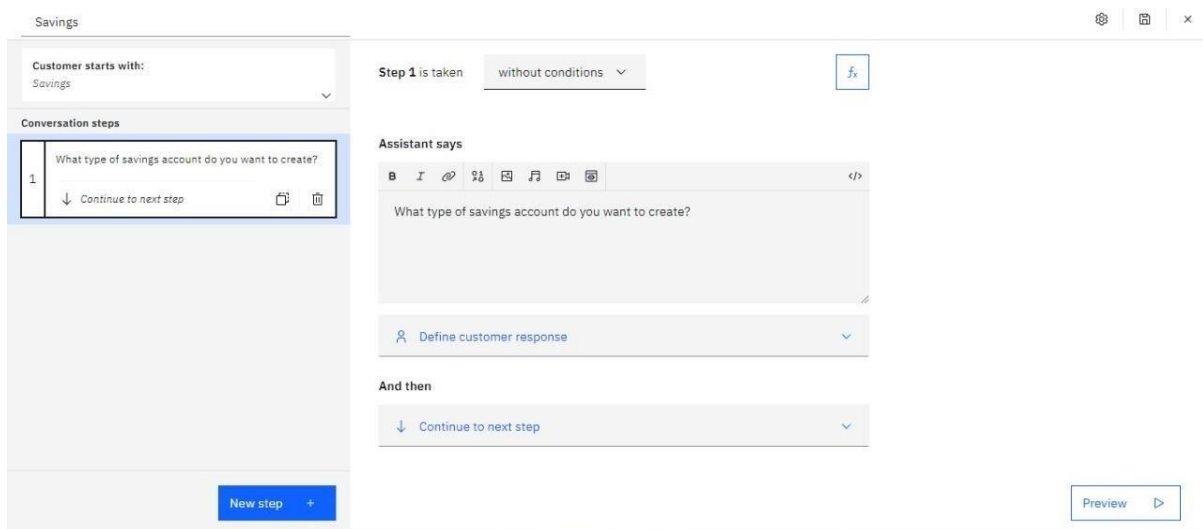
**Task started on:** 31- 10 - 2022

**Task completion date:** 01 - 11 - 2022

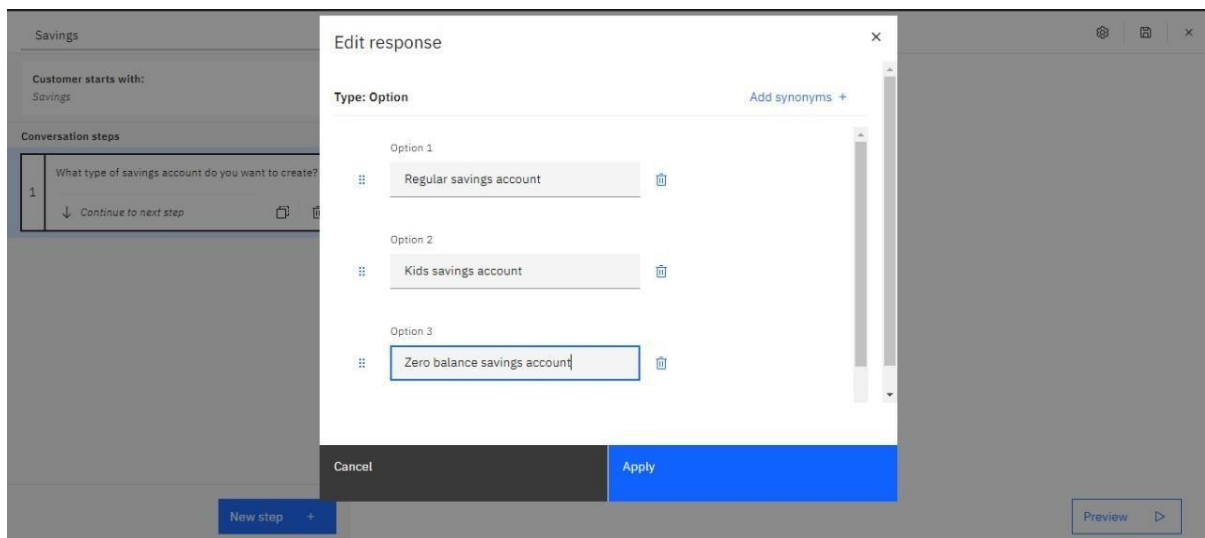
**Progress 1:** Created a new action for the Savings account.



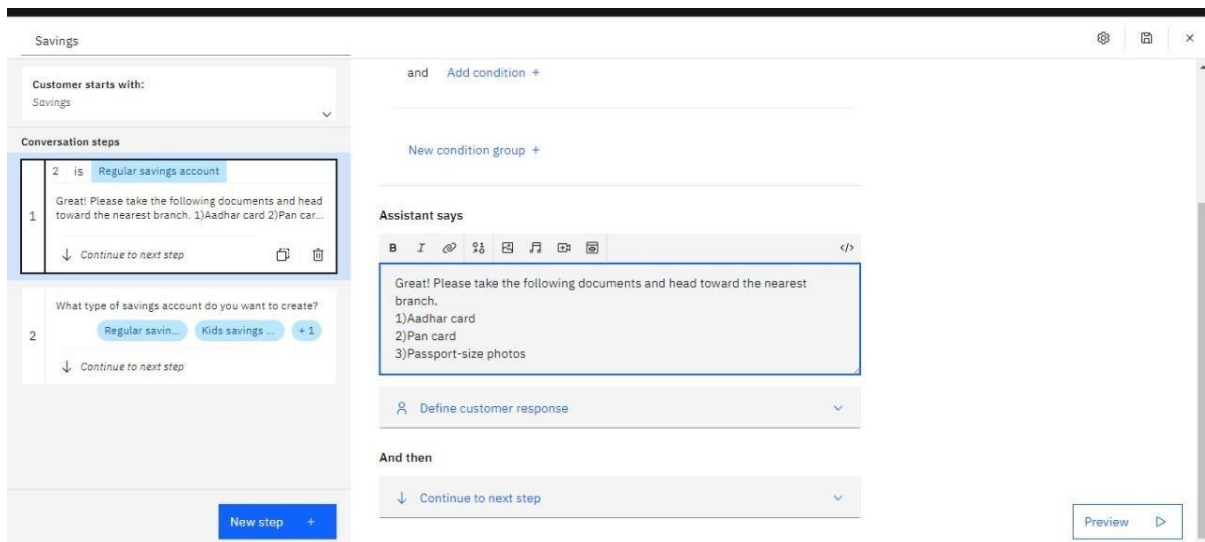
**Progress 2:** Creating the chatbot's response to the savings account message.



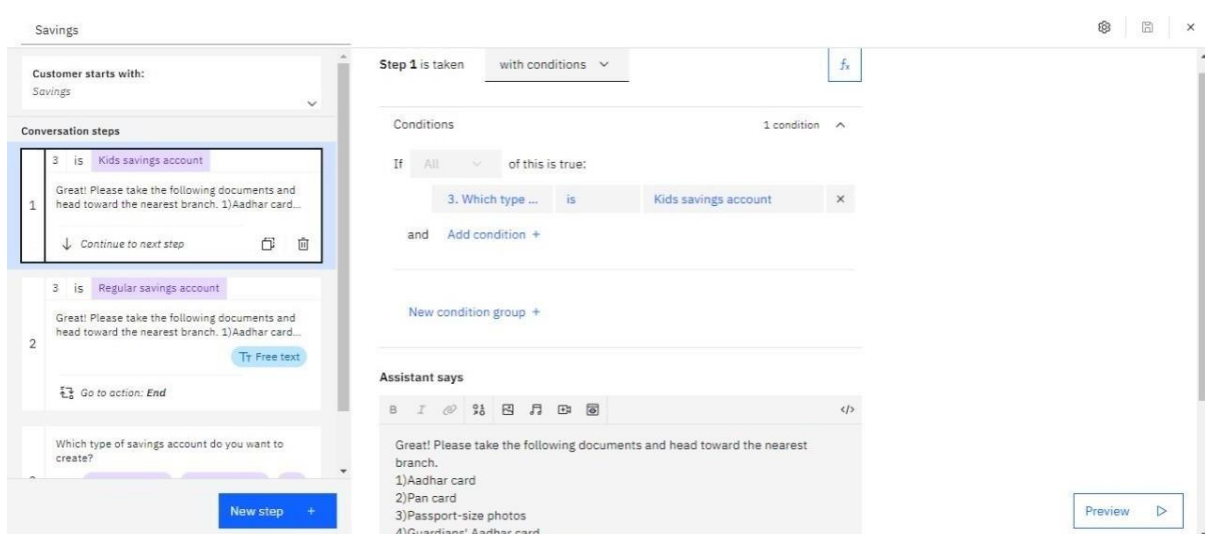
### Progress 3: Adding available options for savings account action.



### Progress 4: The “regular savings account” response is added.



### Progress 5: The “kids savings account” response is added.



**Progress 6:** The “zero-balance savings account” response is added.

Savings

Conversation steps

4 is Kids savings account

1

Great! Please take the following documents and head toward the nearest branch. 1)Aadhar card...

Tr Free text

Go to action: End

4 is Zero balance savings account

2

Amazing! Please take the following documents and head toward the nearest branch. 1)Aadhar card...

Tr Free text

Continue to next step

4 is Regular savings account

3

Great! Please take the following documents and head toward the nearest branch. 1)Aadhar card...

Tr Free text

New step +

Conditions

1 condition

If All of this is true:

4. Which type ... is Zero balance savings acco... X

and Add condition +

New condition group +

Assistant says

B I %& # \$ % & ' >

Amazing! Please take the following documents and head toward the nearest branch.  
1)Aadhar card  
2)Pan card  
3)Passport-size photos

Preview ▶

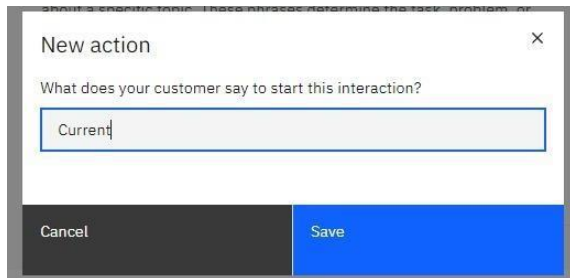
# CREATING CURRENT ACCOUNT ACTION

**Task assigned:** NANDHAKUMAR.B

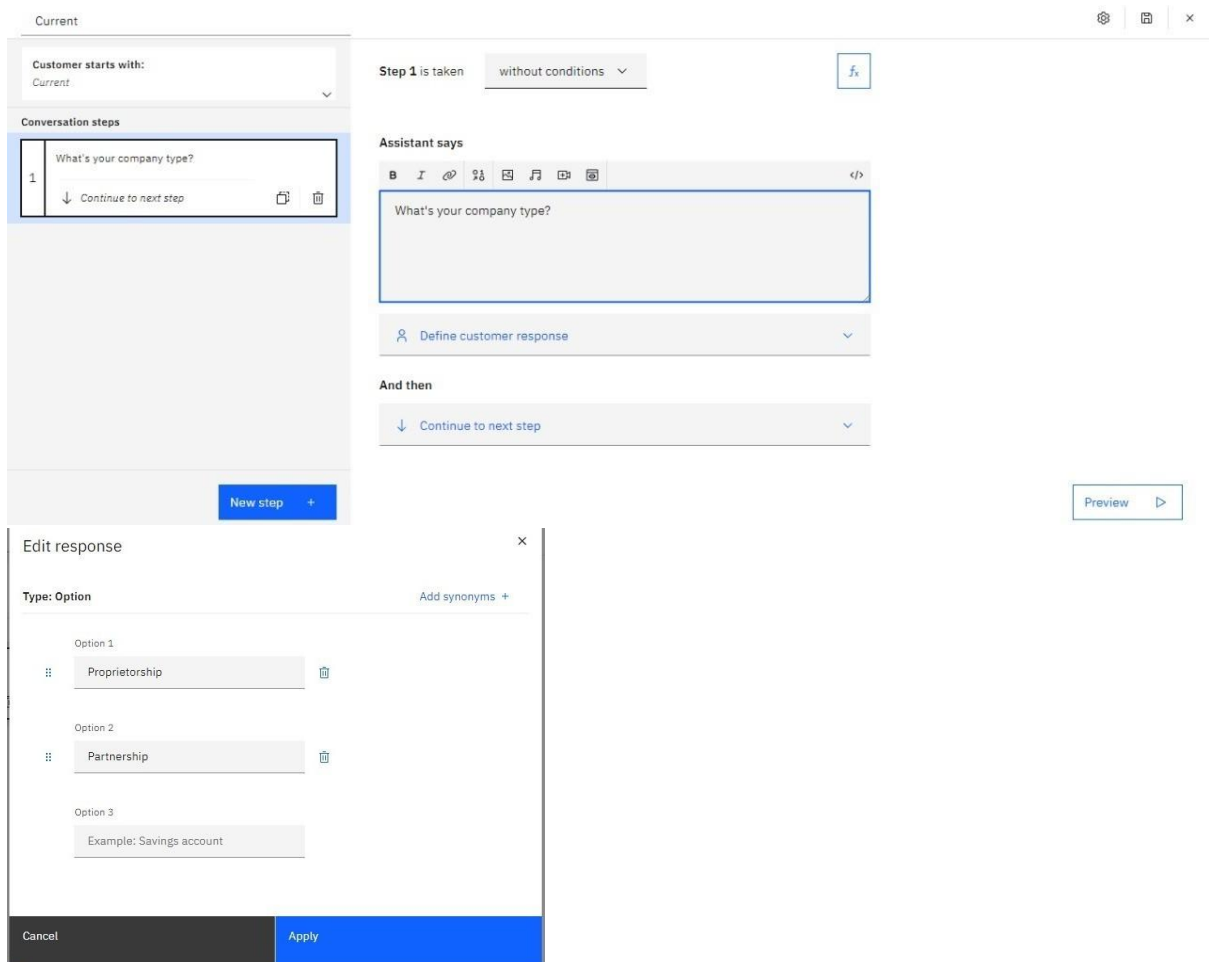
**Task started on:** 31 - 10 - 2022

**Task completion date:** 01 - 11 - 2022

**Progress 1:** Creating a new current action.



**Progress 2:** Asking the user "what's your company type?" and show the available options immediately after the user chooses the current account.



### Progress 3: The “proprietorship” answer is added.

The screenshot shows a chatbot configuration window with a 'Current' tab. On the left, the 'Conversation steps' panel shows Step 1 with the question 'What's your company type?' and two possible answers: 'Proprietorship' and 'Partnership'. Step 2 is highlighted, showing a message: 'Please take the following documents and approach the closest branch. 1)Income Tax Returns of the...' with a 'Try Free text' button. On the right, the 'Step 2 is taken' panel shows a condition being added. The condition is 'If All of this is true: 1. What's you... is Proprietorship'. Below this, there is a 'New condition group +' button. The 'Assistant says' panel shows the response text: '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'. A 'Preview' button is visible at the bottom right.

### Progress 4: The “partnership” response is being added.

The screenshot shows the same chatbot configuration window, but now with a third step added. In the 'Conversation steps' panel, Step 2 is still highlighted, but a new Step 3 is added below it. Step 3 has the condition '1 is Partnership' and the same message as Step 2. The 'Step 2 is taken' panel now shows a condition: 'If All of this is true: 1. What's you... is Partnership'. The 'Assistant says' panel shows the response text: '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'. A 'Define customer response' button is visible at the bottom right.

# CREATING LOAN ACCOUNT ACTION

**Task assigned:** MURALI.S

**Task started on:** 31- 10 - 2022

**Task completion date:** 01 - 11 - 2022

**Progress 1:** Created a new action for the Loan account.

A dialog box titled "New action" with a close button (X) in the top right corner. Below the title, it asks "What does your customer say to start this interaction?". There is a text input field containing the word "Loan". At the bottom, there are two buttons: "Cancel" on the left and "Save" on the right.

**Progress 2:** Asking the user "what type of loan are you looking for" and show the available options immediately after the user chooses the loan account query.

A screenshot of a configuration interface for a "Loan" action. On the left, under "Conversation steps", there is a list with one step: "1 What type of loan are you looking at?" with a "Continue to next step" link. Below this is a "New step +" button. On the right, under "Assistant says", there is a text area containing "What type of loan are you looking at?". Below this is a dropdown menu labeled "Define customer response". Under "And then", there is a dropdown menu labeled "Continue to next step". At the bottom right, there is a "Preview" button.

Two side-by-side screenshots of the "Edit response" dialog box. Both have a title bar "Edit response" and a close button (X). The left dialog shows "Type: Option" and a list of options: "Option 1: House loan", "Option 2: Gold loan", "Option 3: Topup loan", and "Option 4". The right dialog shows "Type: Option" and a list of options: "Option 3: Topup loan", "Option 4: Student loan", and "Option 5: Vehicle loan". Both dialogs have "Cancel" and "Apply" buttons at the bottom.



### Progress 3: The “House loan” response is being added.

The screenshot shows the configuration interface for a chatbot named "Loan". On the left, the "Conversation steps" panel shows a sequence of steps. Step 1 is "What type of loan are you looking at?" with options "House loan" and "Gold loan". Step 2 is highlighted, showing a response: "To be eligible for a house loan, please contact the bank service provider with all your existing loan...". The right panel shows the configuration for "Step 2 is taken" with the condition "with conditions". The "Conditions" section shows a single condition: "If All of this is true: 1. What type ... is House loan". The "Assistant says" section shows the response text: "To be eligible for a house loan, please contact the bank service provider with all your existing loan details." A "Preview" button is visible at the bottom right.

### Progress 4: The “Gold loan” response is being added.

The screenshot shows the configuration interface for the "Loan" chatbot. The "Conversation steps" panel on the left shows Step 3 being configured. Step 1 is "What type of loan are you looking at?" with options "House loan" and "Gold loan". Step 2 is "To be eligible for a house loan, please contact the bank service provider with all your existing loan...". Step 3 is highlighted, showing a response: "Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passpor...". The right panel shows the configuration for "Step 3 is taken" with the condition "with conditions". The "Conditions" section shows a single condition: "If All of this is true: 1. What type ... is Gold loan". The "Assistant says" section shows the response text: "Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passport-size photos". A "Preview" button is visible at the bottom right.

### Progress 5: The “Top-up loan” response is being added.

The screenshot shows the configuration interface for the "Loan" chatbot. The "Conversation steps" panel on the left shows Step 4 being configured. Step 1 is "What type of loan are you looking at?" with options "House loan" and "Gold loan". Step 2 is "To be eligible for a house loan, please contact the bank service provider with all your existing loan...". Step 3 is "Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passpor...". Step 4 is highlighted, showing a response: "To be eligible for a house loan, please contact the bank service provider with all your existing loan...". The right panel shows the configuration for "Step 4 is taken" with the condition "with conditions". The "Conditions" section shows a single condition: "If All of this is true: 1. What type ... is Topup loan". The "Assistant says" section shows the response text: "To be eligible for a house loan, please contact the bank service provider with all your existing loan details." A "Preview" button is visible at the bottom right.

## Progress 6: The “Student loan” response is being added.

The screenshot displays the configuration interface for a chatbot named "Loan". On the left, a list of steps is shown, with Step 5, "Student loan", highlighted. The main panel on the right shows the configuration for Step 5. It includes a "Conditions" section with a single condition: "1. What type ... is Student loan". Below this, the "Assistant says" section contains the text: "Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passport-size photos". A "Preview" button is located at the bottom right.

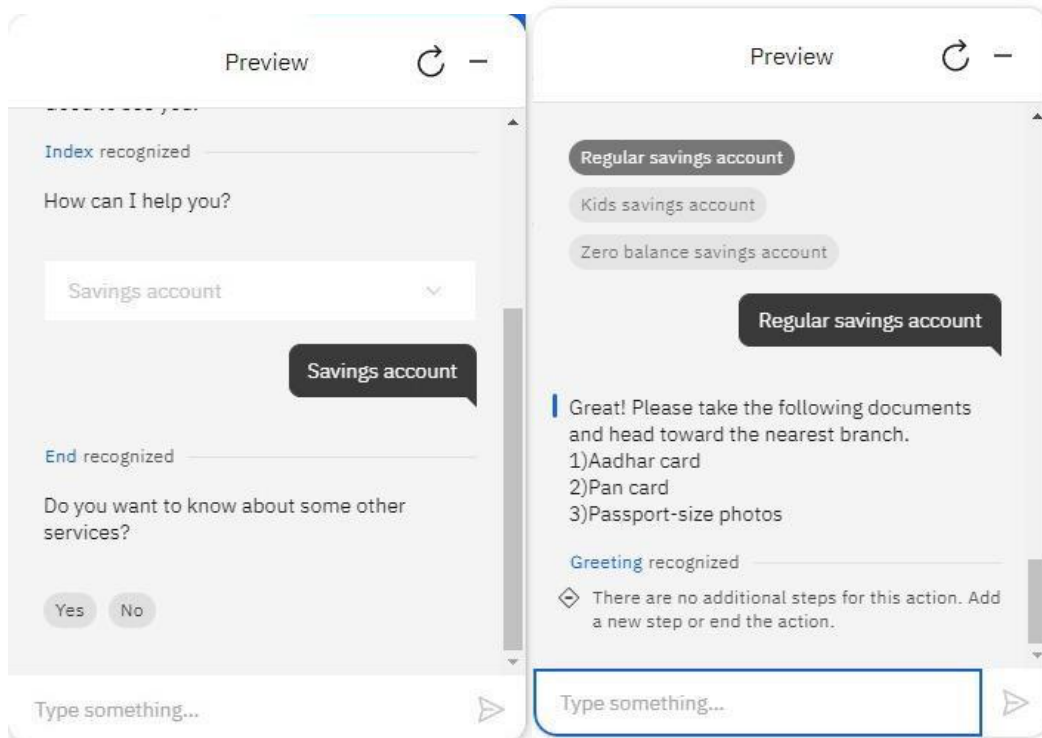
## Progress 7: The “Vehicle loan” response is being added.

The screenshot displays the configuration interface for the "Loan" chatbot, now showing Step 6, "Vehicle loan", highlighted in the left sidebar. The main configuration panel shows the conditions and response for Step 6. The condition is "1. What type ... is Vehicle loan". The "Assistant says" section contains the text: "Kindly approach the bank with the following documents. 1)Automobile Invoice 2)Pan card 3)Income Tax Returns for the last three years". A "Preview" button is visible at the bottom right.

# Testing the chatbot

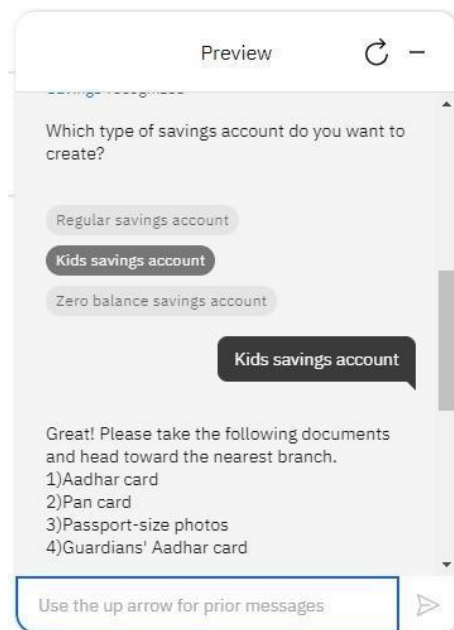
The Savings Account Action is being tested.

Testing 1: Savings account and Regular savings account.



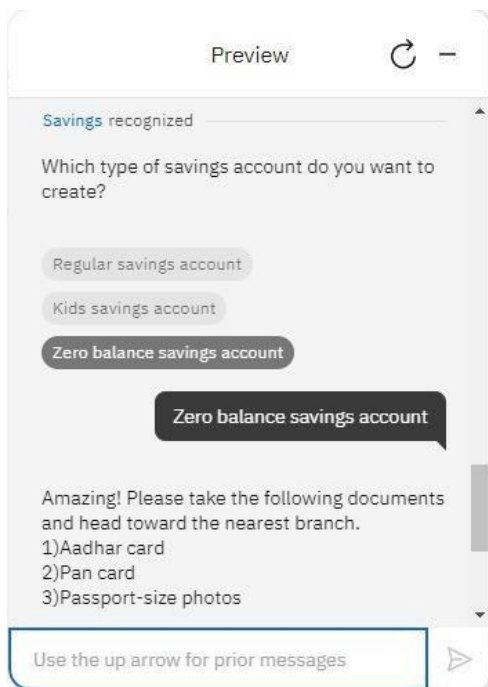
Test result: passed

Testing 2: Kids savings account.



Test result: passed

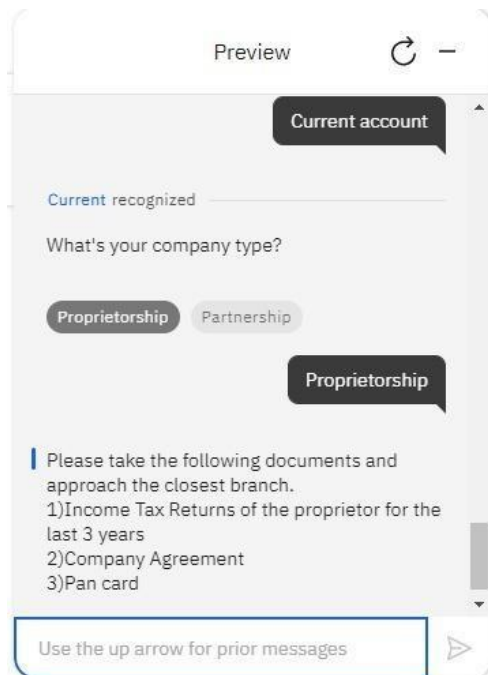
### Testing 3: Zero balance savings account.



**Test result: passed**

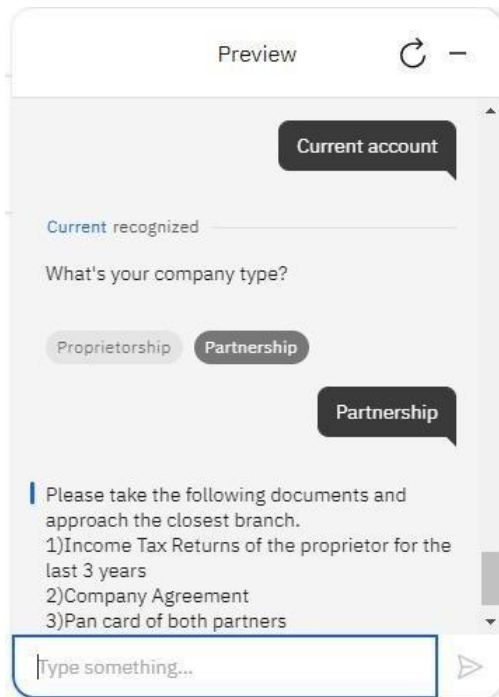
### The Current Account Action is being tested.

#### Testing 1: Proprietorship.



**Test result: passed**

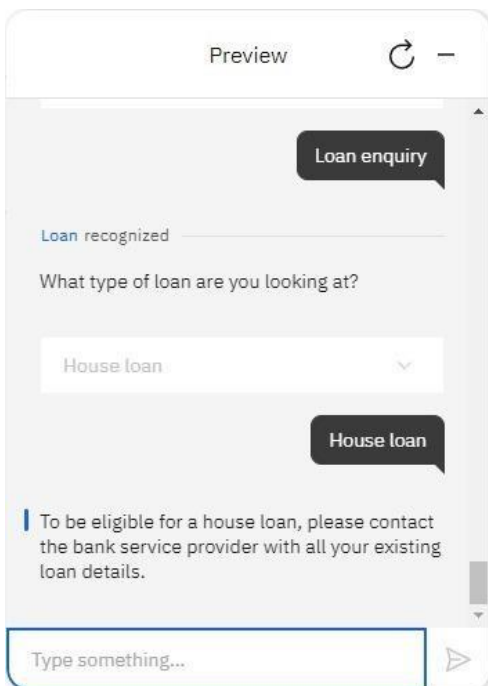
## Testing 2: Partnership.



**Test result:** passed

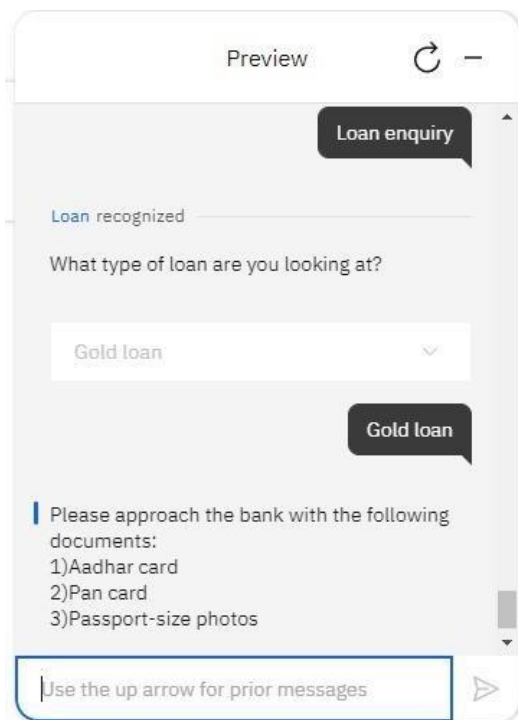
## The Loan Account Action is being tested.

### Testing 1: Loan enquiry and House loan



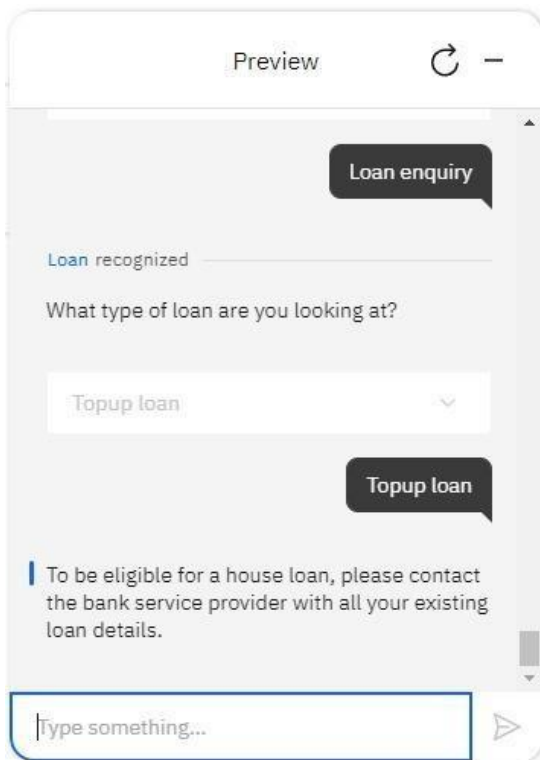
**Test result:** passed

## Testing 2: Gold loan



**Test result:** passed

## Testing 3: top-up loan.



**Test result:** passed

#### Testing 4: Student loan.

The screenshot shows a chatbot interface with a 'Preview' header and a refresh icon. A dark bubble contains the text 'Loan enquiry'. Below, the text 'Loan recognized' is followed by a horizontal line. The question 'What type of loan are you looking at?' is displayed above a dropdown menu currently showing 'Student loan'. A second dark bubble contains the text 'Student loan'. Below this, a list of documents is provided: 'Please approach the bank with the following documents: 1)Acceptance Letter from Institution 2)Pan card 3)Passport-size photos'. At the bottom, a text input field contains the placeholder 'Use the up arrow for prior messages' and a right-pointing arrow icon.

**Test result:** passed

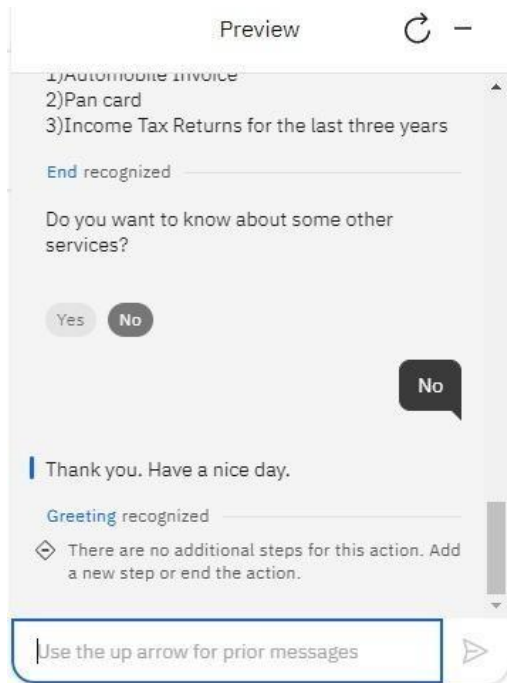
#### Testing 5: Vehicle loan.

The screenshot shows a chatbot interface with a 'Preview' header and a refresh icon. A dark bubble contains the text 'Loan enquiry'. Below, the text 'Loan recognized' is followed by a horizontal line. The question 'What type of loan are you looking at?' is displayed above a dropdown menu currently showing 'Vehicle loan'. A second dark bubble contains the text 'Vehicle loan'. Below this, a list of documents is provided: 'Kindly approach the bank with the following documents. 1)Automobile Invoice 2)Pan card 3)Income Tax Returns for the last three years'. At the bottom, a text input field contains the placeholder 'Use the up arrow for prior messages' and a right-pointing arrow icon.

**Test result:** passed

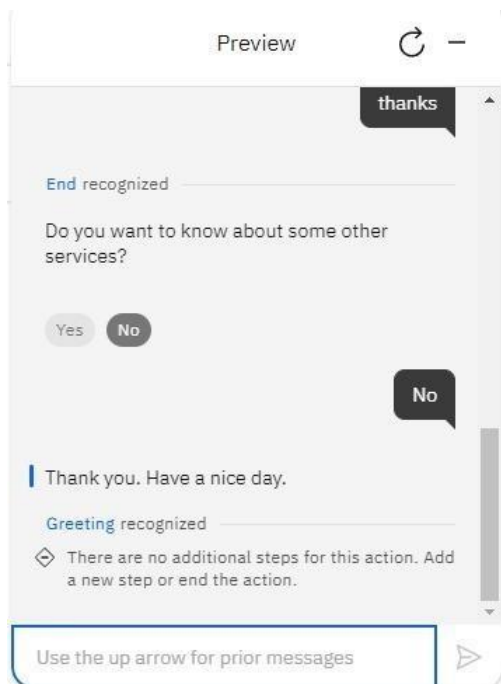
**All existing actions and conversation-ending action links are being tested.**

### **Testing 1: without free-text feature**



**Test result: passed**

### **Testing 2: with free-text feature**



**Test result: passed**

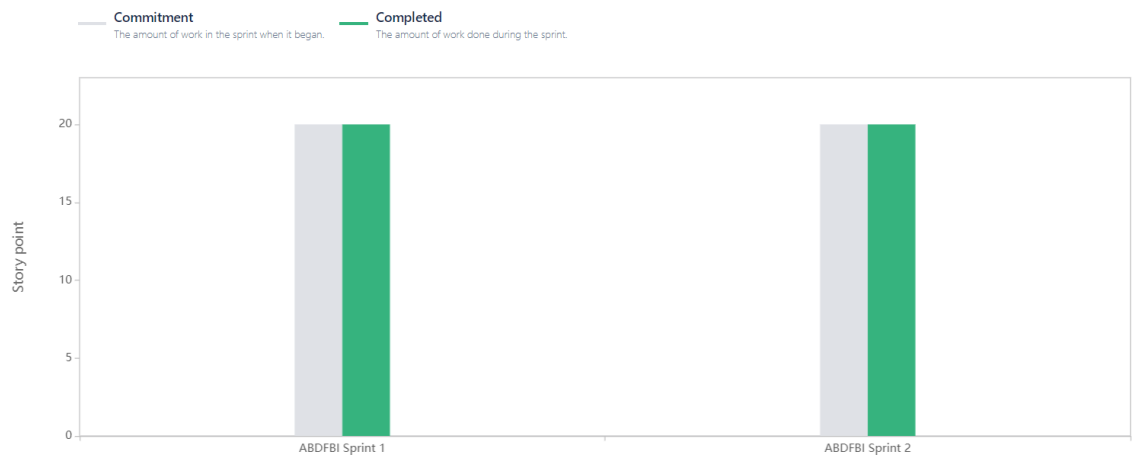


# JIRA

Projects / AI Based Discourse For Banking Industry / Reports

## Velocity report

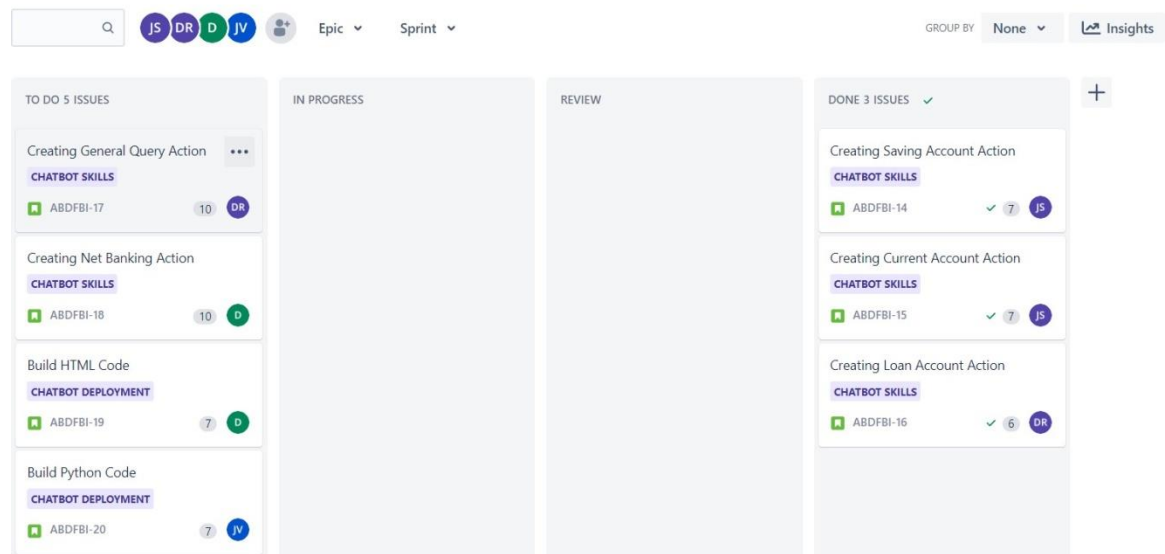
[How to read this report](#)



Projects / AI Based Discourse For Banking Industry

## All sprints

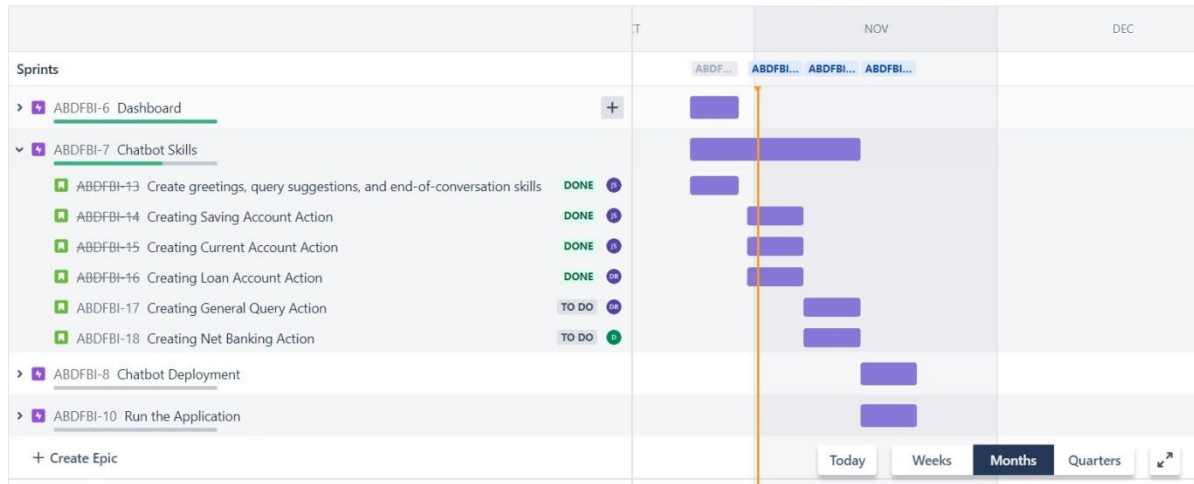
[Complete sprint](#)



## Roadmap

[Give feedback](#) [Share](#) [Export](#) [...](#)

JS JV D DR
Status category ▾
View settings



## Backlog

JS DR D JV
Epic ▾
Insights

Epic

Issues without epic

- Dashboard
- Chatbot Skills
- Chatbot Deployment

ABDFBI Sprint 2 31 Oct – 6 Nov (3 issues)

Creating Saving Account Action , Creating Current Account Action , Creating Loan Account Action

- ABDFBI-14 Creating Saving Account Action **CHATBOT SKILLS** 7 DONE ✓ JS
- ABDFBI-15 Creating Current Account Action **CHATBOT SKILLS** 7 DONE ✓ JS
- ABDFBI-16 Creating Loan Account Action **CHATBOT SKILLS** 6 DONE ✓ DR

+ Create issue

## Sprint burndown chart

[How to read this report](#)

Sprint

ABDFBI Sprint 2

Estimation field

Story points

**Date** - October 31st, 2022 - November 6th, 2022

**Sprint goal** - Creating Saving Account Action , Creating Current Account Action , Creating Loan Account Action

