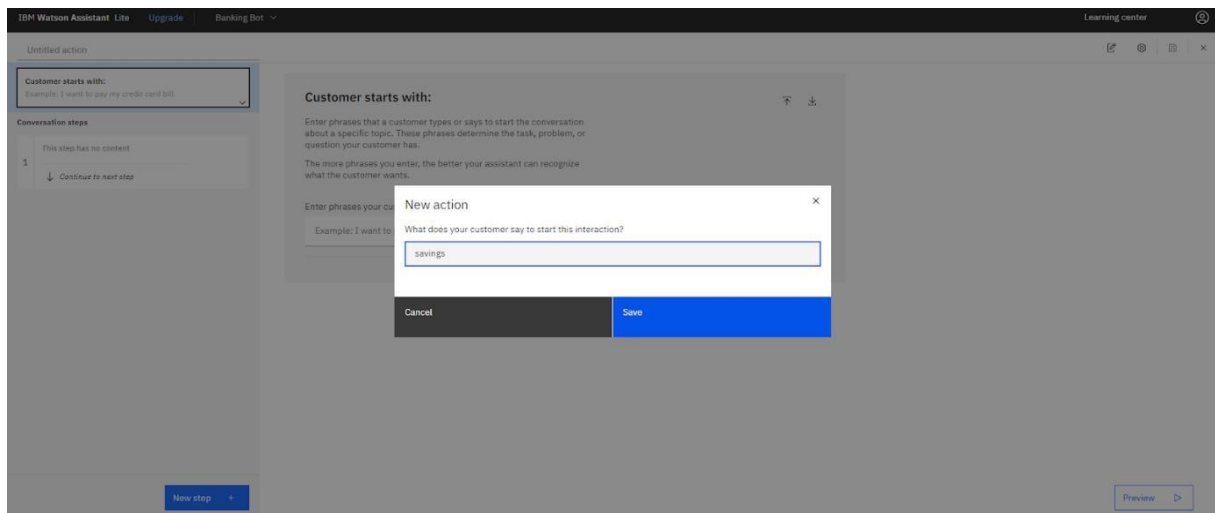


Project Development Phase

SPRINT 2

Date	14 November 2022
Team ID	PNT2022TMID43731
Project Name	AI based discourse for Banking Industry

1.Savings account action

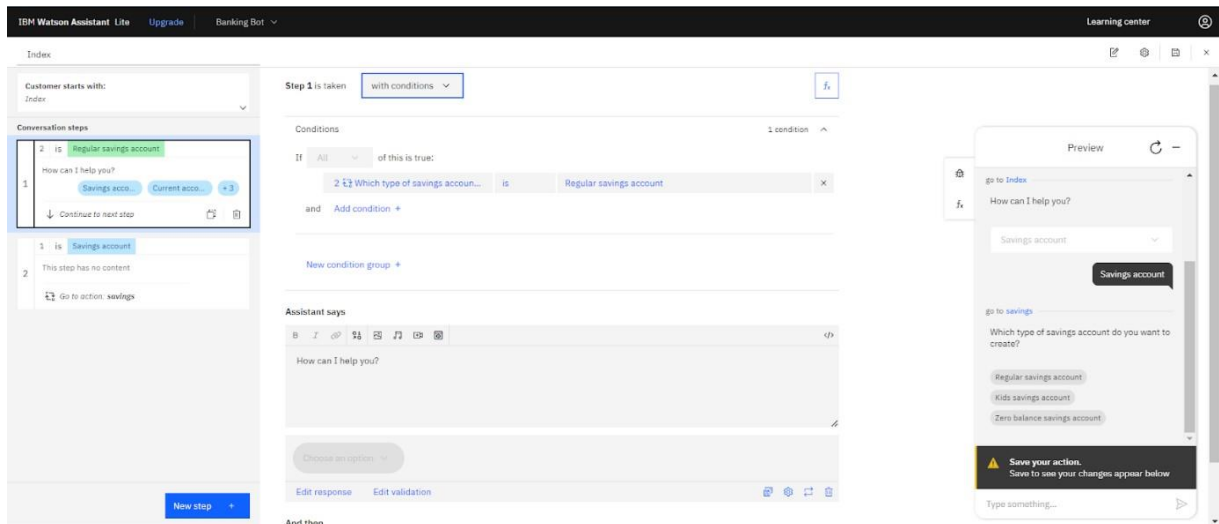


Here we have three categories of savings account as a customer response.

- 1.Regular savings account
- 2.Kids savings account
- 3.Zero balance savings account

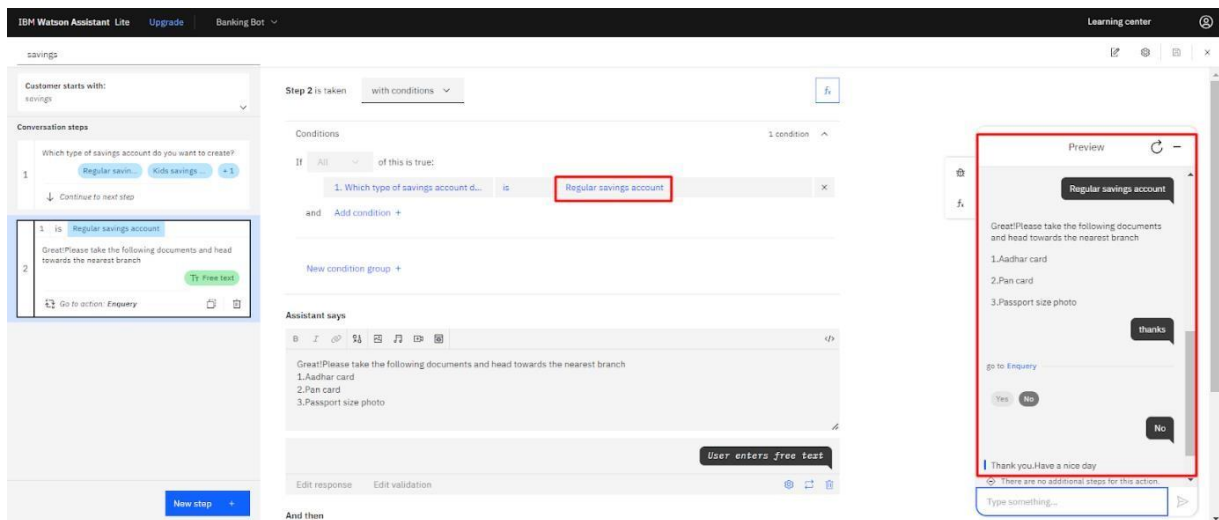
So when we select the savings account option we should be redirected to the above options

So we link the index actions with the savings actions..



Now if we click the regular saving account option details will be displayed and conversation is ended based on our response i.e yes/no

If No:



If yes:

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Enquiry

Customer starts with: Enquiry

Conversation steps

1 This step has no content

2 Thank you Have a nice day

3 This step has no content

Go to action: Index

Conditions

If All of this is true:

1. No response is Yes

Assistant says

For example: What size do you want to order?

Define customer response

And then

Go to another action

Preview

1.Aadhar card

2.Pan card

3.Passport size photo

thanks

go to Enquiry

Yes No

Yes

go to Index

How can I help you?

Select an option

Type something...

The same goes for kids savings account and zero balance account

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

savings

Customer starts with: savings

Conversation steps

1 Which type of savings account do you want to create?

2 Great!Please take the following documents and head towards the nearest branch

3 Awesome!Please take the following documents and head to nearest branch

Go to action: Enquiry

Conditions

If All of this is true:

1. Which type of savings account d... is Kids savings account

Assistant says

Awesome!Please take the following documents and head to nearest branch

1.Aadhar card

2.PAN card

3.Passport size photo

User enters free text

Edit response Edit validation

And then

Go to another action

Preview

Savings account

go to savings

Which type of savings account do you want to create?

Regular savings account

Kids savings account

Zero balance savings account

Kids savings account

Awesome!Please take the following documents and head to nearest branch

1.Aadhar card

2.PAN card

3.Passport size photo

Use the up arrow for prior messages

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

savings

Conversation steps

1 Which type of savings account do you want to create?

2 Great!Please take the following documents and head towards the nearest branch

3 Awesome!Please take the following documents and head to nearest branch

4 Awesome!Please take the following documents and head to nearest branch

Go to action: Enquiry

Conditions

If All of this is true:

1. Which type of savings account d... is Zero balance savings account

Assistant says

Awesome!Please take the following documents and head to nearest branch

1.Aadhar card

2.PAN card

3.Passport size photo

Define customer response

And then

Go to another action

Preview

Which type of savings account do you want to create?

Regular savings account

Kids savings account

Zero balance savings account

Zero balance savings account

Awesome!Please take the following documents and head to nearest branch

1.Aadhar card

2.PAN card

3.Passport size photo

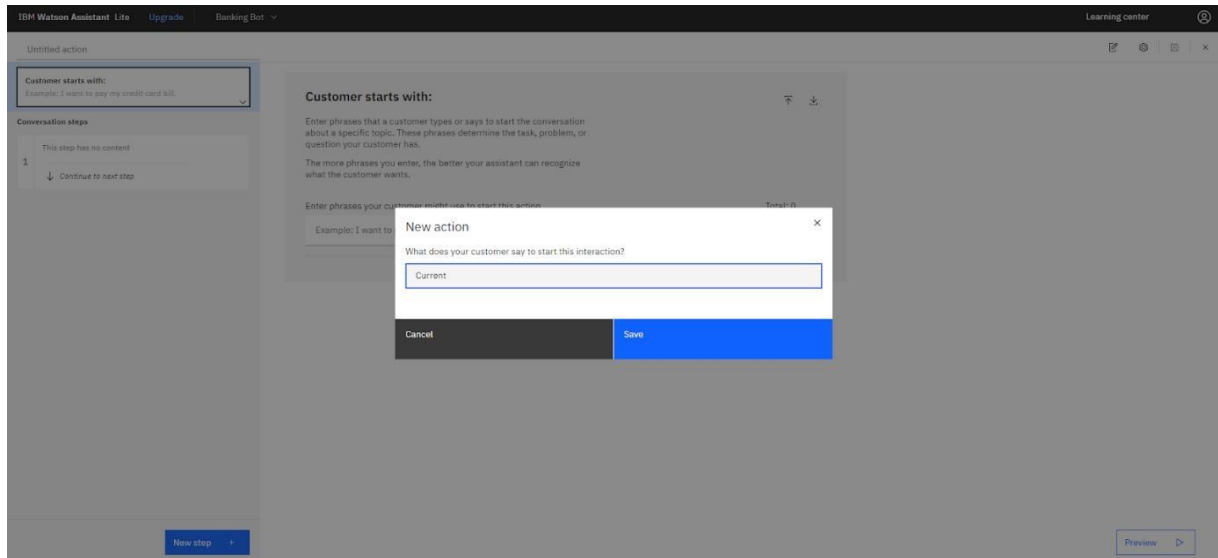
go to Enquiry

Do you want to know about any other services?

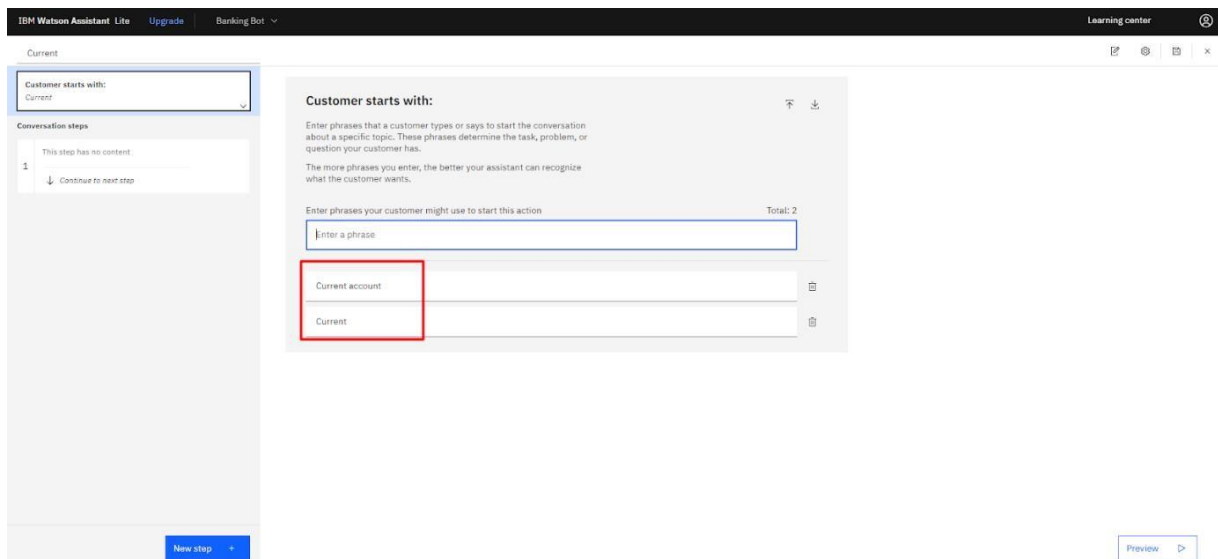
Use the up arrow for prior messages

2. Current account action:

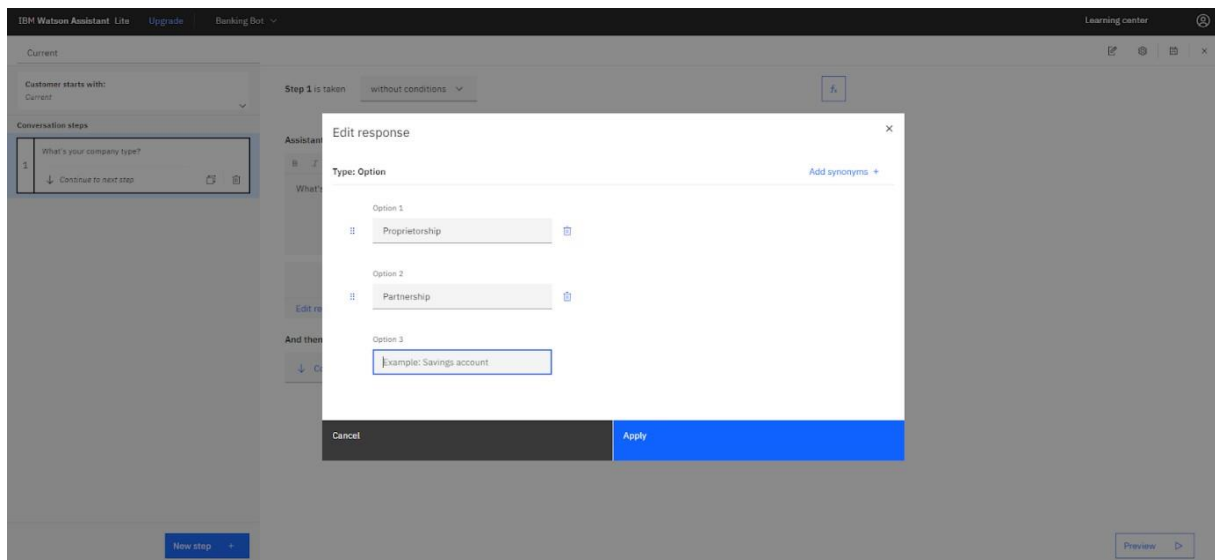
Now we create the action for current account queries.



If a customer types current or current account he will be redirected to this current action

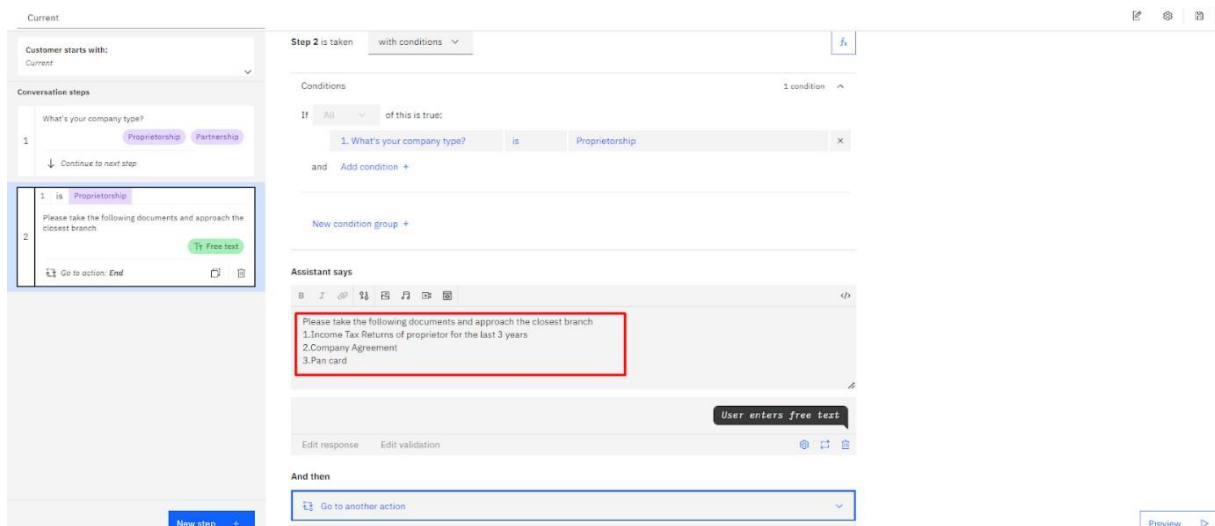


In customer response we add the company types as options

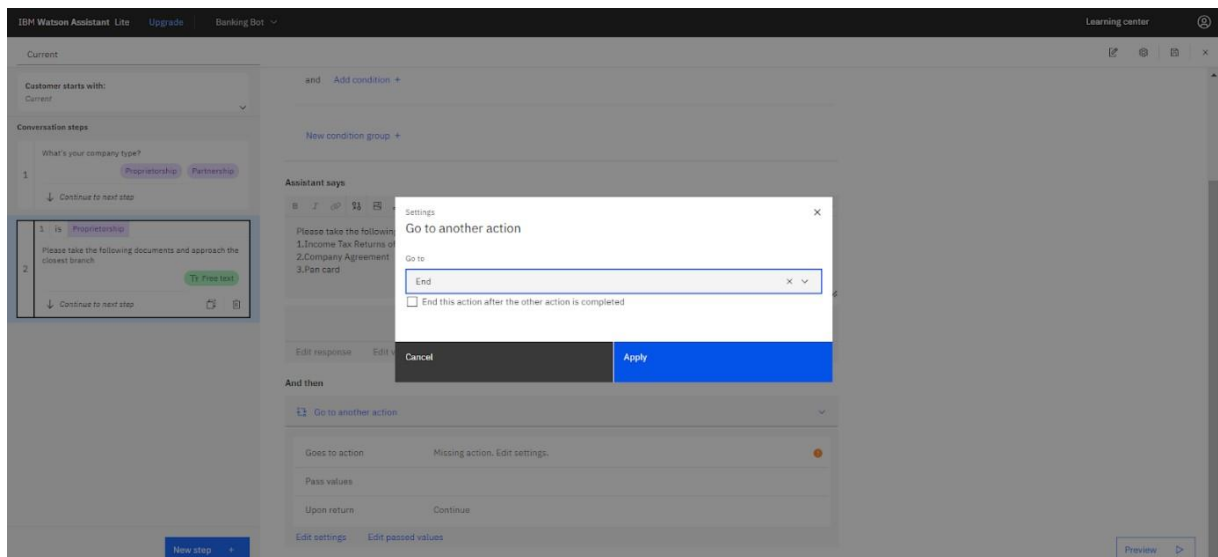


The user has two options to select the following images show the action done if user clicks on Proprietorship company.

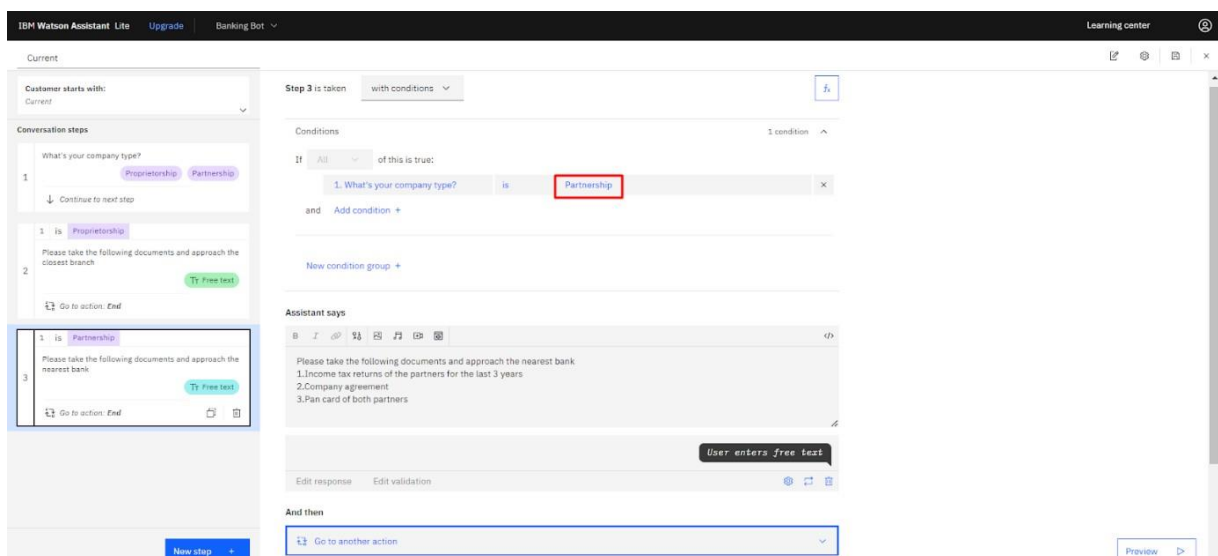
The chat bots' response as follows..



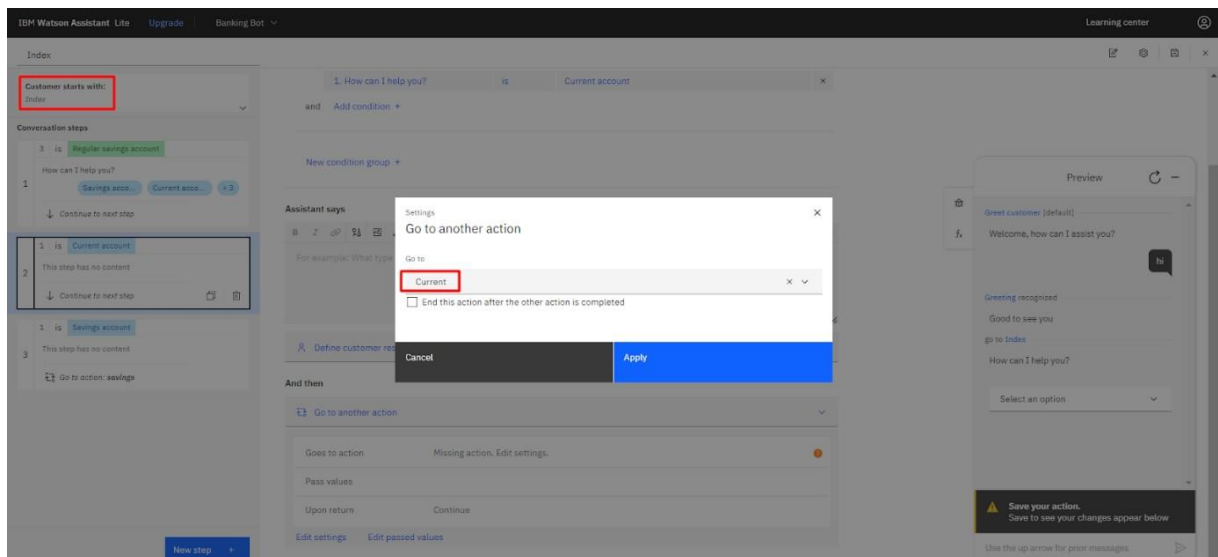
And according to users response we will redirect him to END action



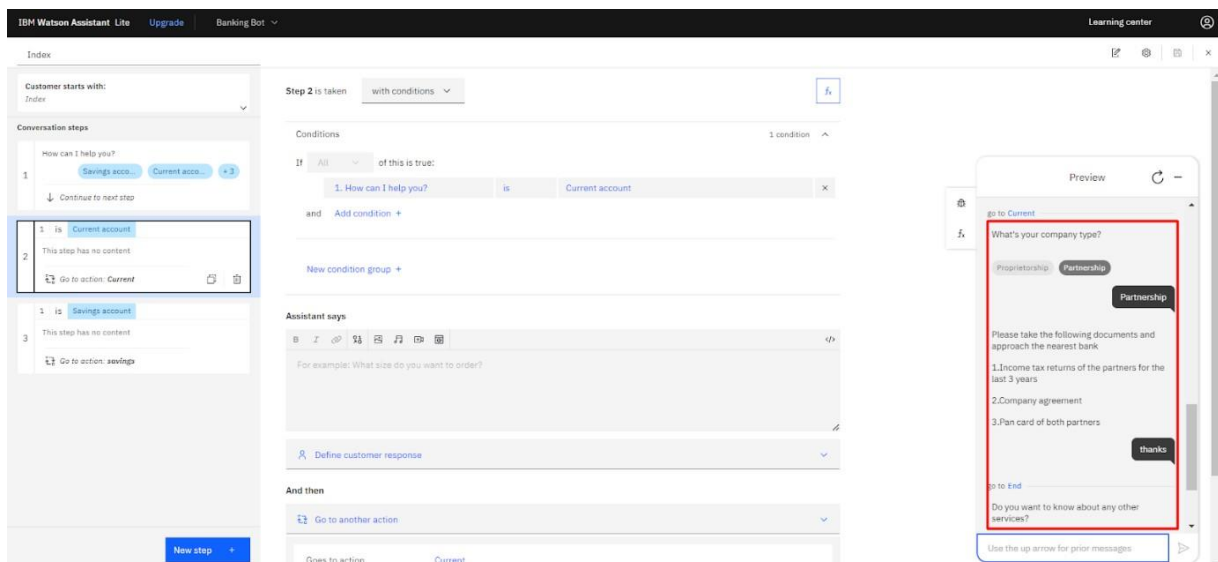
Now if the user clicks as partnership company we set the actions as follows similar to above action



Now we need to link this current account action to index action

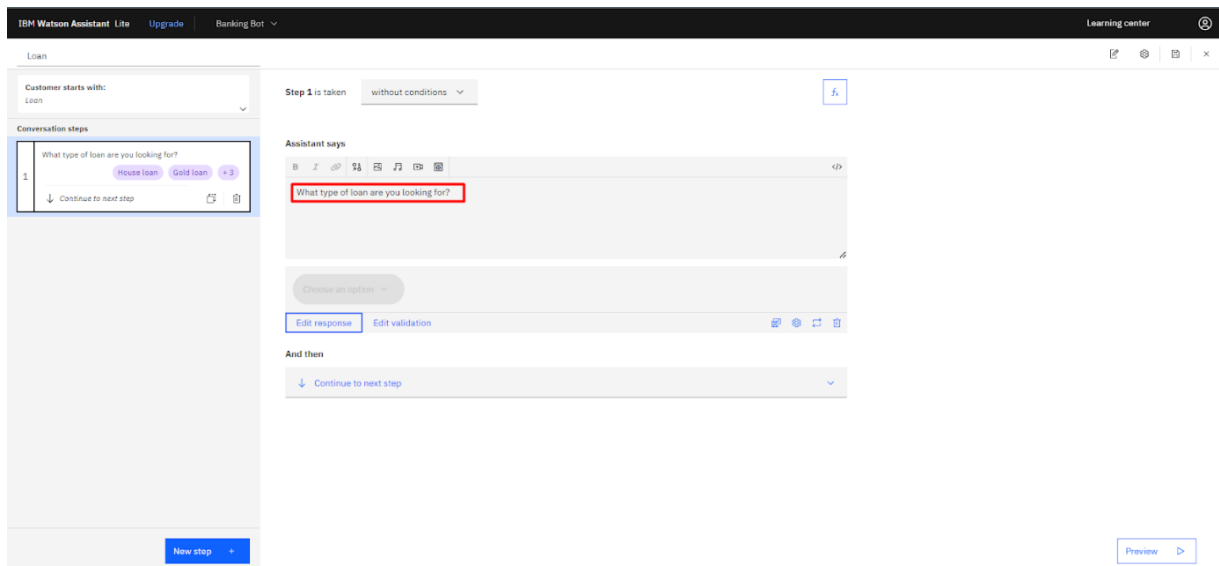
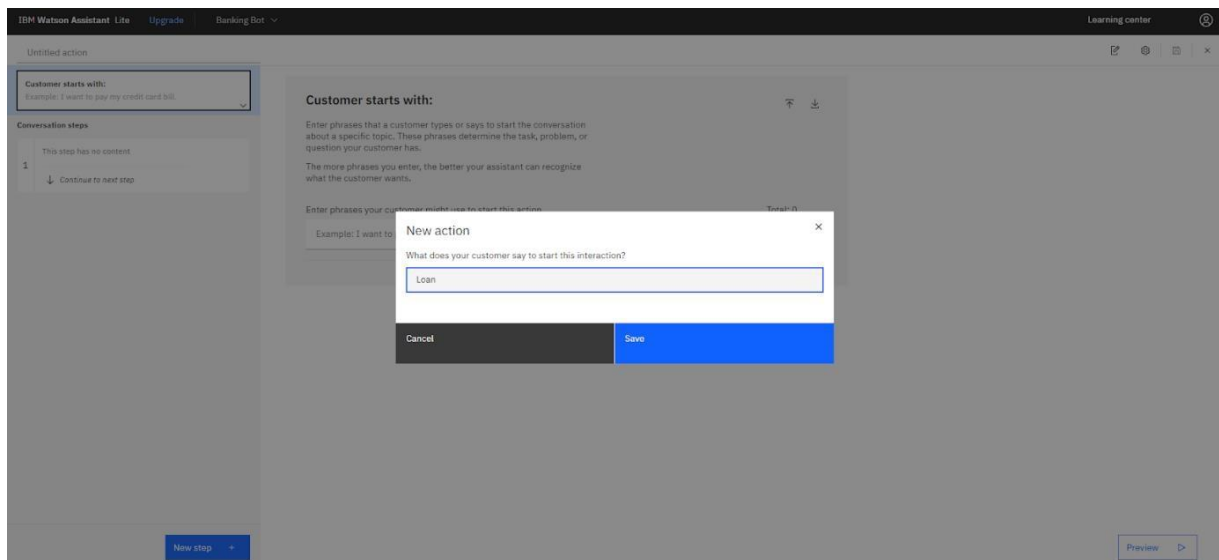


Now the preview shows

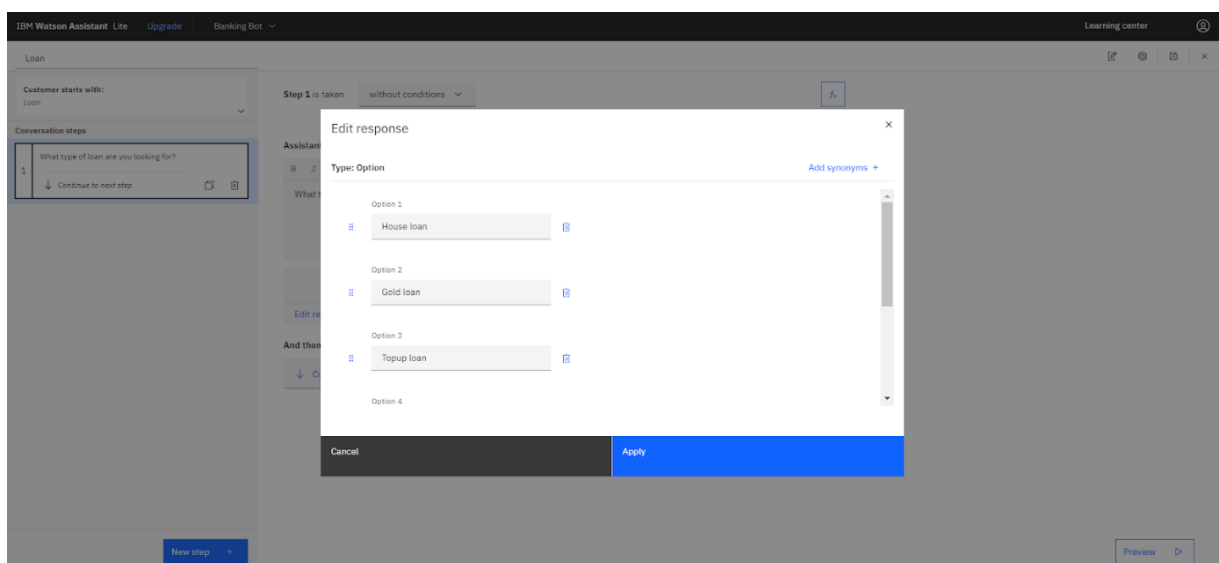


3. Loan action

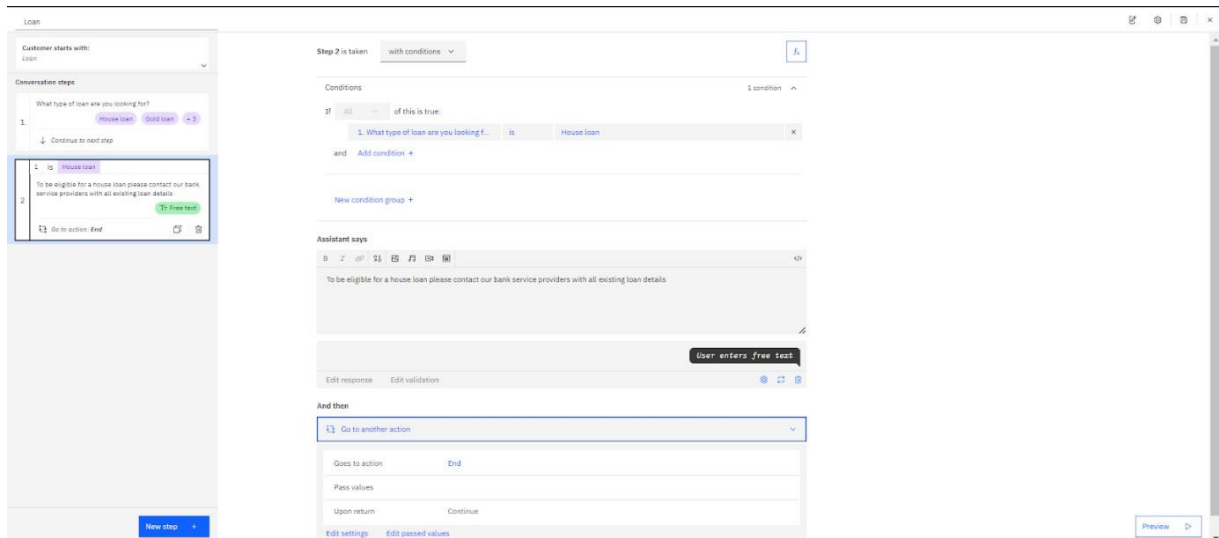
Here we create actions for loan queries



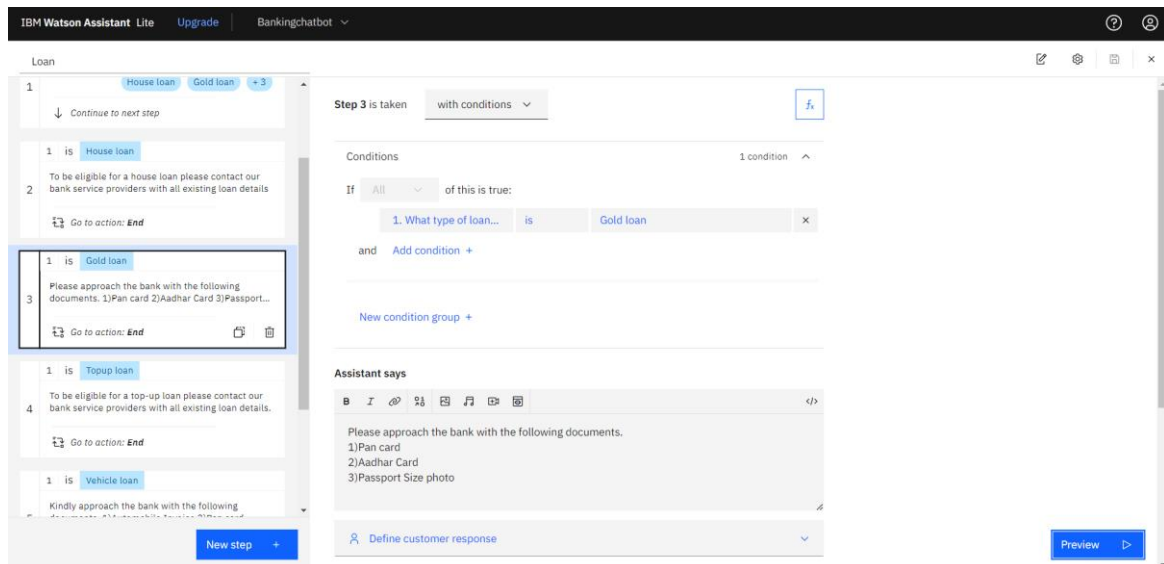
Customer response:



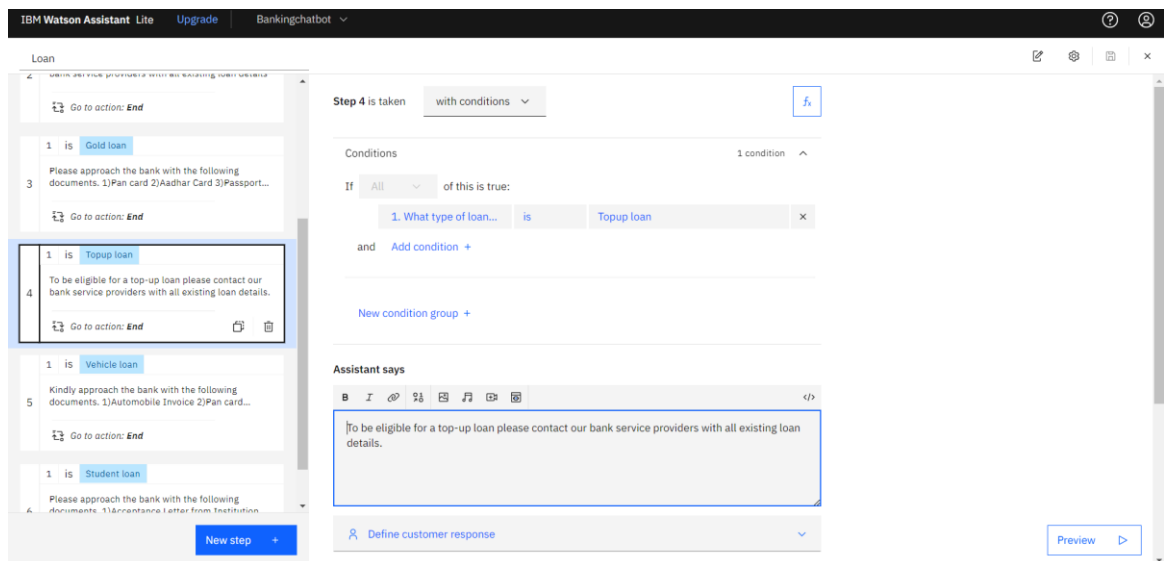
If the customer clicks on house loan:



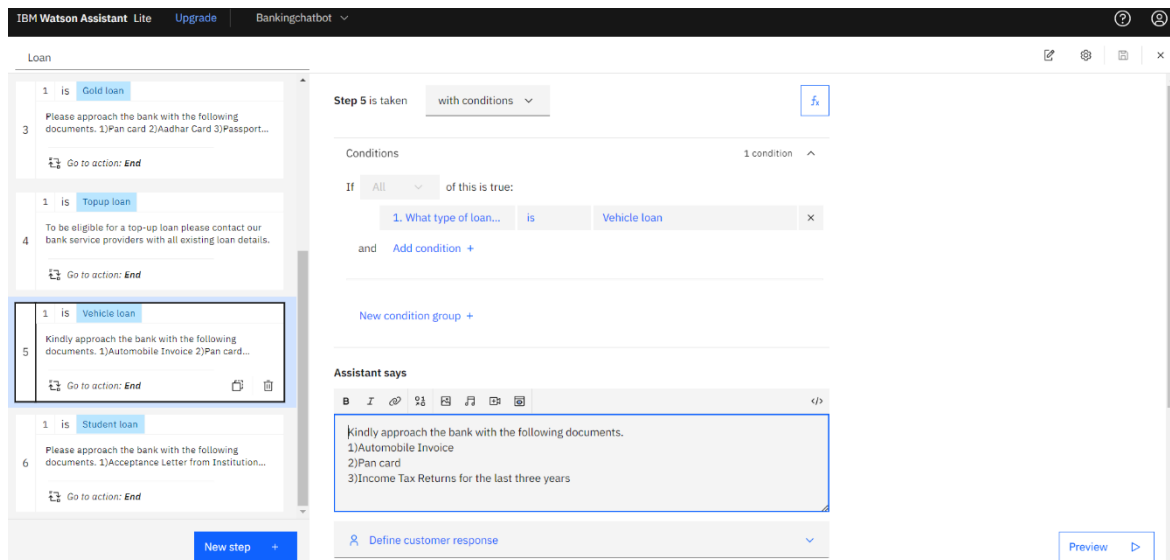
If the user clicks on gold loan:



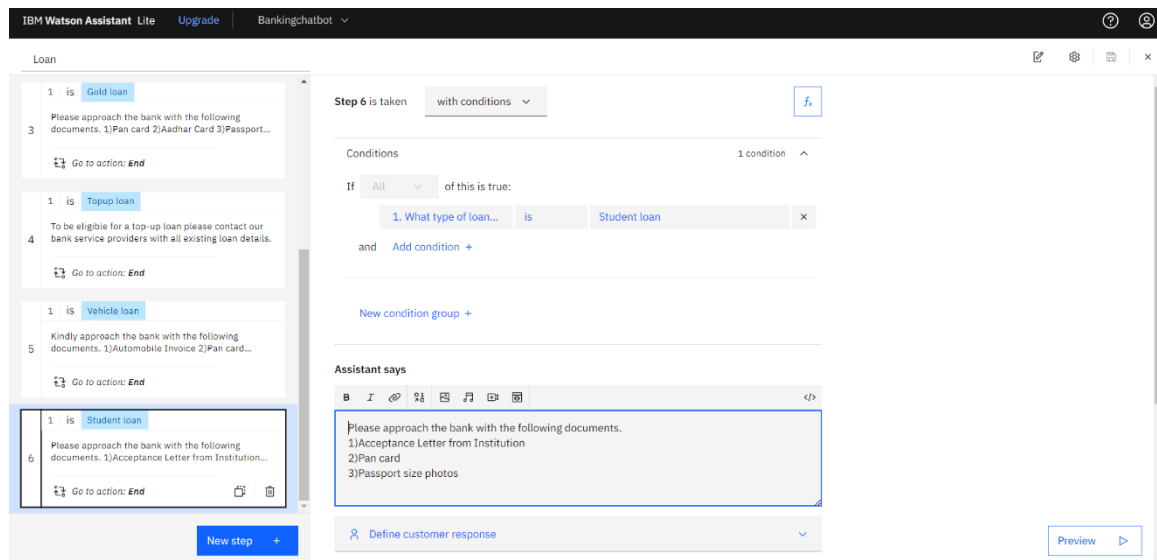
If the user clicks on topup loan:



If the user clicks on vehicle loan:



If the user clicks on Student loan:



Now we have to connect loan action with index action

IBM Watson AssistantLifeUpgradeBanking Bot

Index

Customer starts with:
Index

Conversation steps

1

How can I help you?

General queryNet banking- 3

Continue to next step

1

is

Loan enquiry

2

This step has no content

Go to action: *Loan*

1

is

Current account

3

This step has no content

Go to action: *Current*

1

is

Savings account

4

This step has no content

Go to action: *savings*

New step +

Step 2 is takenwith conditions

Conditions1 condition

IfAll of this is true:

1. How can I help you?isLoan enquiry

andAdd condition +

New condition group +

Assistant says

B I

For example: What type of transfer would you like to make?

Define customer response

And then

Go to another action

Goes to actionLoan

Pass values

Upon returnContinue

Edit settingsEdit passed values