Project Development Phase
Sprint 2

Date	11 November 2022
Team ID	PNT2022TMID43737
Project Name	AI-Based Discourse For Banking Industry

Screenshots of Sprint 2 Tasks:

Creating Loan Account Actions:
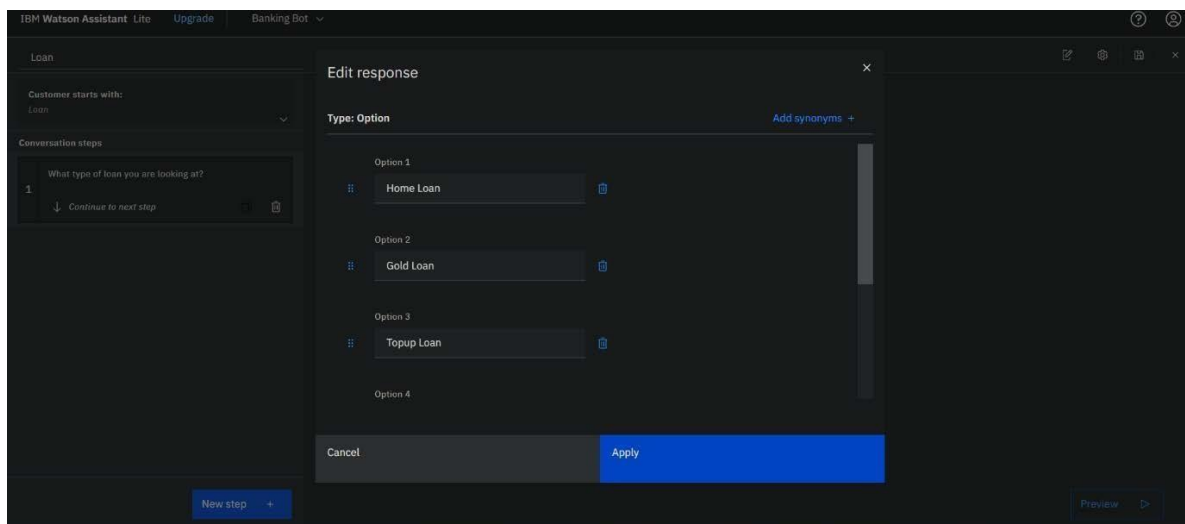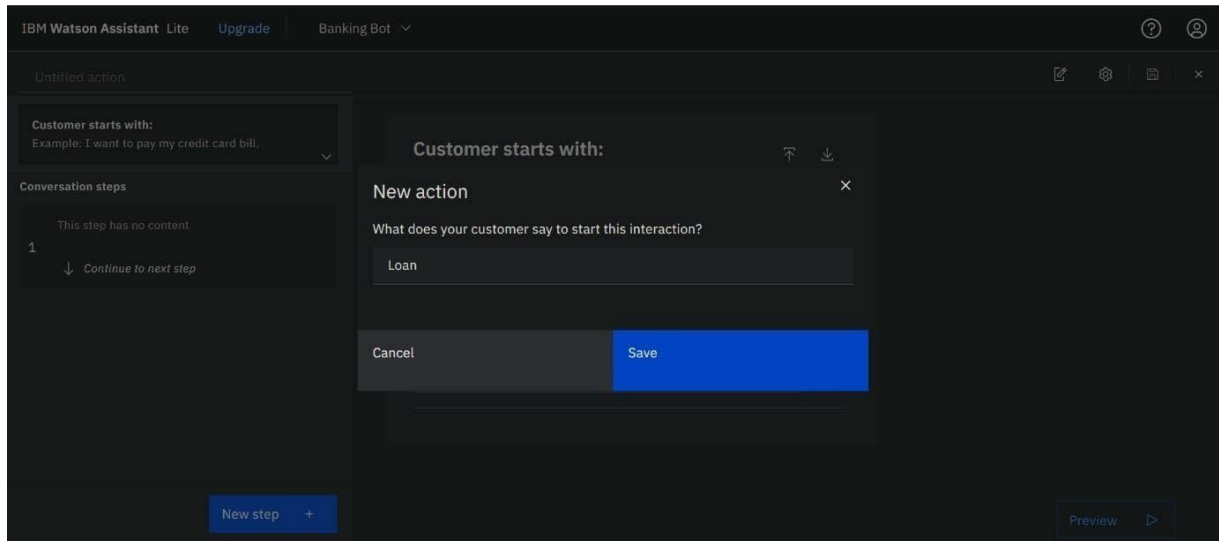
Loan

1 What type of loan you are looking at?
    Home Loan   Student Loan   + 3
    ↓ Continue to next step

2   1   is   Gold Loan
Please approach the bank with the following documents:
    Tᴛ Free text
    ⇄ Go to action: **End**

3   1   is   Topup Loan
To be eligible for top-up loan please contact our bank service providers with all existing...
    Tᴛ Free text

New step   +

Conditions   1 condition ⌃

If   All ⌄   of this is true:

    1. What typ...   is   Gold Loan   ✕

and   Add condition +

New condition group +

Assistant says

B   I   ⌯   ⅜   ⊡   ♫   ▣   ▣   </>

Please approach the bank with the following documents:
- PAN Card
- Aadhaar Card
- Passport size photos

Preview ▷

Loan

    ↓ Continue to next step

2   1   is   Gold Loan
Please approach the bank with the following documents:
    Tᴛ Free text
    ⇄ Go to action: **End**

3   1   is   Topup Loan
To be eligible for top-up loan please contact our bank service providers with all existing...
    Tᴛ Free text
    ⇄ Go to action: **End**

   1   is   Vehicle Loan

New step   +

Conditions   1 condition ⌃

If   All ⌄   of this is true:

    1. What typ...   is   Topup Loan   ✕

and   Add condition +

New condition group +

Assistant says

B   I   ⌯   ⅜   ⊡   ♫   ▣   ▣   </>

To be eligible for top-up loan please contact our bank service providers with all existing loan details.

Preview ▷

Loan

3 To be eligible for top-up loan please contact our bank service providers with all existing...
    Tᴛ Free text
    ⇄ Go to action: **End**

4   1   is   Vehicle Loan
Kindly approach the bank with the following documents:
    Tᴛ Free text
    ⇄ Go to action: **End**

5   1   is   Student Loan
Please visit the nearest available bank with the following documents.

New step   +

    1. What typ...   is   Vehicle Loan   ✕

and   Add condition +

New condition group +

Assistant says

B   I   ⌯   ⅜   ⊡   ♫   ▣   ▣   </>
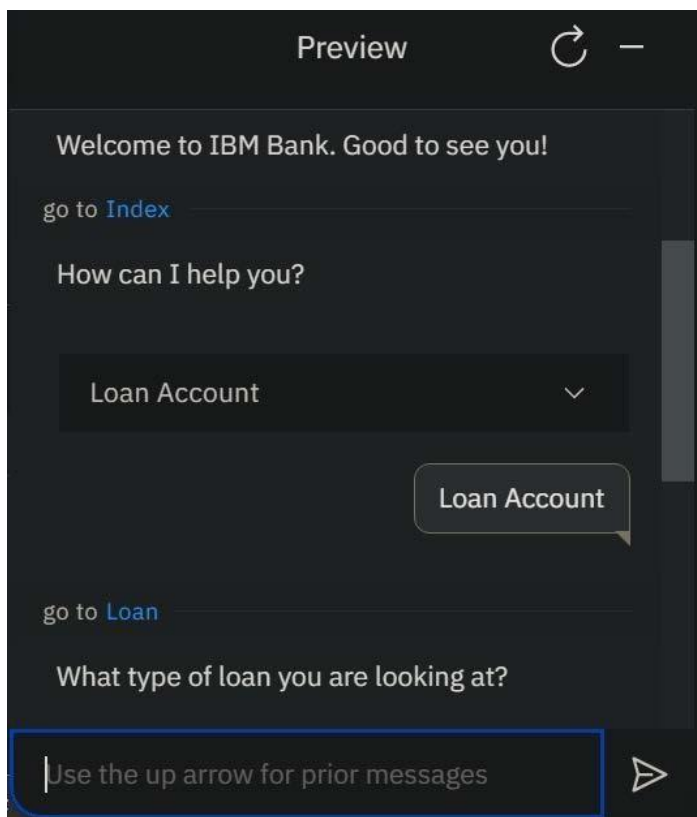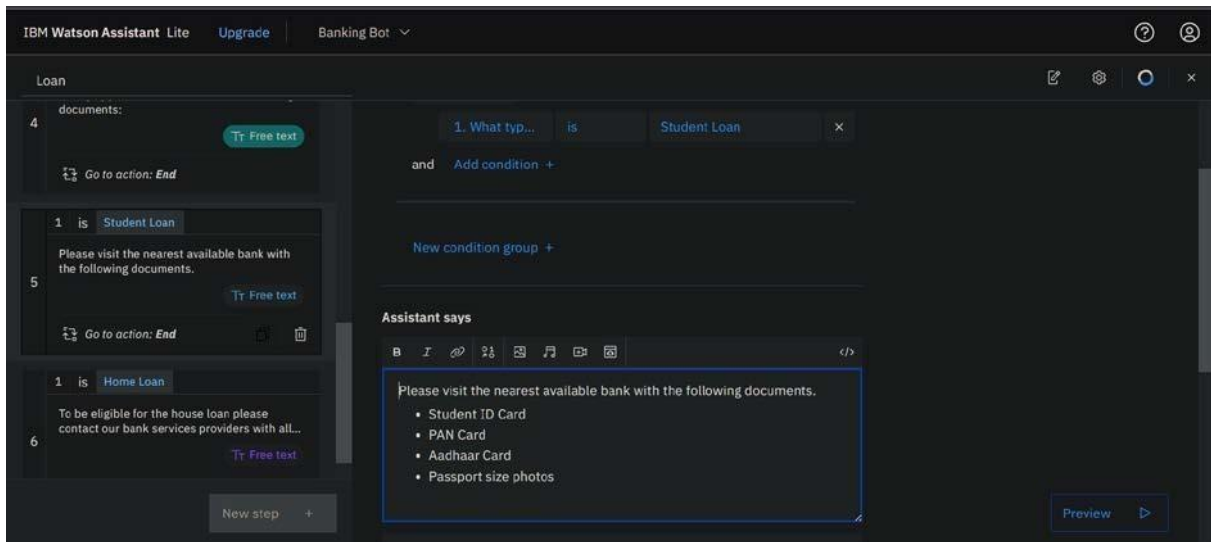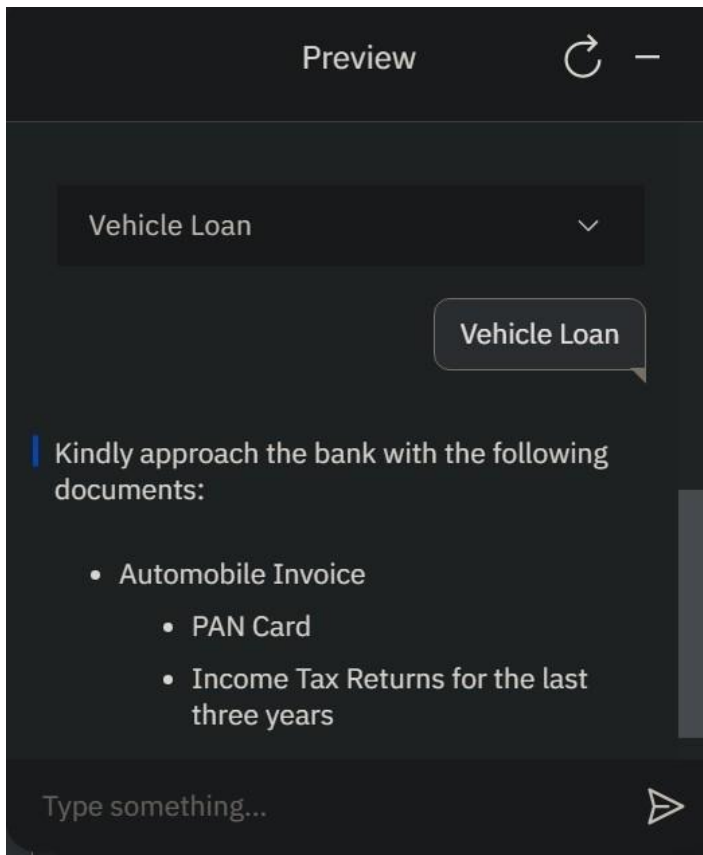
Kindly approach the bank with the following documents:
- Automobile Invoice
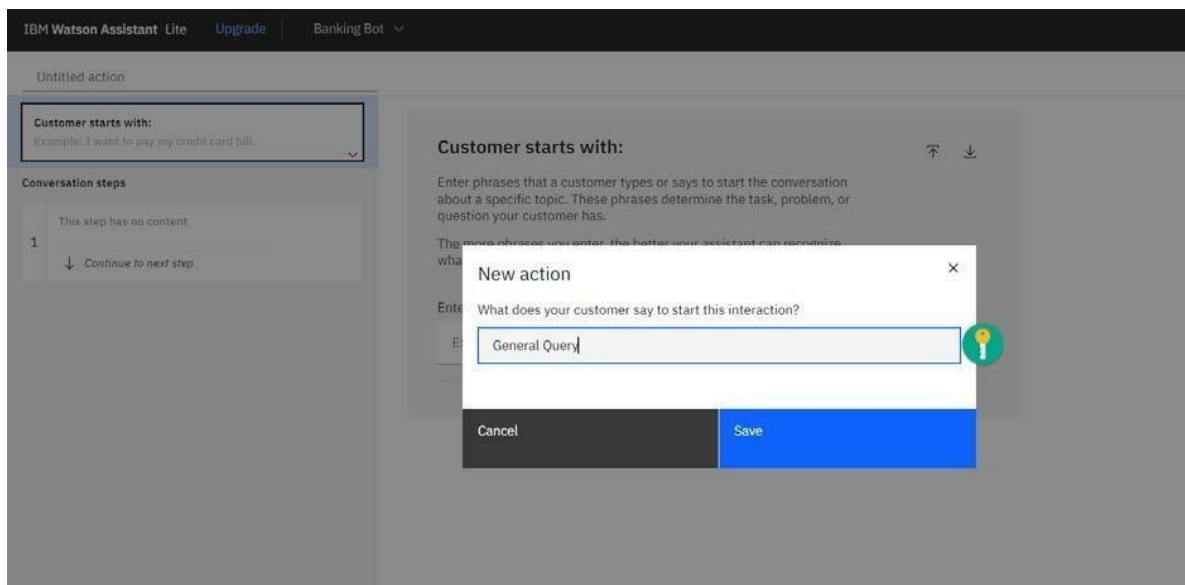- PAN Card
- Income Tax Returns for the last three years

Preview ▷

User enters free text

Creating General Query Action:

Edit response

Type: Option   Add synonyms +

Option 1

⠿ Bank Working Days   🗑

Option 2

⠿ List of Branches   🗑

Option 3

⠿ Storage Locker Facility   🗑

Option 4

Cancel	Apply

General Query

Customer starts with:
General Query   ⌄

Conversation steps

Select the general queries listed below:

1   Bank Workin...   List of Branc...   + 4

   ↓ Continue to next step

2   1   is   Bank Working Days
    The bank is open all days from Monday to Saturday
    from 9 AM to 3 PM, with exception of second...
                                    Tr Free text

   ↓ Continue to next step   ⧉ 🗑

Assistant says

B   I   ∂   ⅔   🖼   🎵   🎞   🎟   </>

The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of
secon

Settings   ✕

Go to another action

Go to

| End   × ⌄ |

☐ End this action after the other action is completed

Cancel	Apply

And then

Goes to action   Missing action. Edit settings.   ⚠

Pass values

Upon return   Continue

General Query

Customer starts with:
General Query

Conversation steps

1. Select the general queries listed below:
   Bank Workin...   List of Branc...   + 4
   ↓ Continue to next step

2. 1 is Bank Working Days
   The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of second...
   ↓ Continue to next step

If All ∨ of this is true:

   1. Select the genera...   is   Bank Working Days   ×

and   Add condition +

New condition group +

Assistant says

B I ∂ % 🖼 🎵 🎬 🖾   </>

The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of second Saturdays.

👤 Define customer response   ∨

Index

Index

Conversation steps

1. How can I help you?
   General Quer...   Loan Account   + 3
   ↓ Continue to next step

2. 1 is Savings Account
   This step has no content
   ⮑ Go to action: **Savings**

3. 1 is Current Account
   This step has no content
   ⮑ Go to action: **Current**

4. 1 is General Queries
   This step has no content
   ↓ Continue to next step

Step 4 is taken   with conditions ∨   *fx*

Conditions   1 condition ∧

If All ∨ of this is true:

   1. How can I help yo...   is   General Queries   ×

and   Add condition +

New condition group +

Assistant says

B I ∂ % 🖼 🎵 🎬 🖾   </>

For example: Please select from the following options:

Greetings recognized ───────

Welcome to IBM Bank. Good to see you!

go to **Index** ────────

How can I help you?

General Queries   ∨

General Queries

go to General Query ────────

Select the general queries listed below:

Select an option   ∨

---

go to General Query ────────

Select the general queries listed below:

Bank Working Days   ∨

Bank Working Days

| The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of second Saturdays.

General Query

Customer starts with:
General Query

Conversation steps

1. Select the general queries listed below:
   Currency Con...   CIBIL   + 4
   ↓ Continue to next step

2. 1 is Bank Working Days
   The bank is open all days from Monday to Saturday from 9 AM to 3 PM, with exception of second...
   Tᴛ Free text
   ⇄ Go to action: End

3. 1 is List of Branches
   ADYAR,ALWARPET,ANNA NAGAR,AYANAVARAM,ASHOK NAGAR,EGMORE,RAMAPURAM,KK...
   Tᴛ Free text
   ⇄ Go to action: End

New step +

Step 3 is taken with conditions ⌄   fₓ

Conditions   1 condition ⌃

If All ⌄ of this is true:
    1. Select the genera... is List of Branches ×

and Add condition +

New condition group +

Assistant says

B I ⊘ ⊹ ▨ ♫ ▣ ▣   </>

ADYAR,ALWARPET,ANNA NAGAR,AYANAVARAM,ASHOK NAGAR,EGMORE,RAMAPURAM,KK NAGAR,KARAPAKKAM,KOYAMBEDU,WEST MAMBALAM

User enters free text

Creating Netbanking Action:

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 wha...

Ente...

E:

New action   ×

What does your customer say to start this interaction?

Net Banking

Cancel   Save

Edit response

Type: Option

Add synonyms +

Option 1

⸬   What is Net Banking?   🗑

Option 2

⸬   How do I register for Net Banking?   🗑

Option 3

⸬   What are the features of Net Banking?   🗑

Option 4

Cancel	Apply

Net Banking

Customer starts with:
Net Banking   ⌄

Conversation steps

1   What queries do you have regarding Net banking?
     [What is Net B...] [How do I regi...] [+ 2]
     ↓   *Continue to next step*

2   1   is   What is Net Banking?
     The facility offered by the bank allows customers to
     use banking services over the internet. Customers ne...
     [T⊤ Free text]
     ↓   *Continue to next step*   ⧉   🗑

New step +

Step 2 is taken   [with conditions ⌄]   [ƒx]

Conditions   1 condition ⌃

If   [All ⌄]   of this is true:

     [1. What queries do ...]   [is]   [What is Net Banking?]   ✕

and   Add condition +

New condition group +

Assistant says

B   *I*   🔗   ⧉   🖼   🎵   🎬   ▣   </>

The facility offered by the bank allows customers to use banking services over the internet.
Customers need not visit their banks branch office to avail each and every small service.

User enters free text

Net Banking

Customer starts with:
Net Banking   ⌄

Conversation steps

1   What queries do you have regarding Net banking?
     [What is Net B...] [How do I regi...] [+ 2]

     ↓ Continue to next step   ⎘   🗑

2   1   is   [What is Net Banking?]
     The facility offered by the bank allows customers to
     use banking services over the internet. Customers ne...
                              [Tᴛ Free text]

     ⇄ Go to action: **End**

3   1   is   [How do I register for Net Banking?]
     Please download and fill up the net banking requisition
     form and submit it to your home branch.
                              [Tᴛ Free text]

     ⇄ Go to action: **End**   ⎘   🗑

                              [New step   +]

Step 3 is taken   [with conditions ⌄]   [fₓ]

Conditions   1 condition   ⌃

If [All   ⌄]   of this is true:

     [1. What queries do ...]   [is]   [How do I register for Net Banking?]   ✕

and   Add condition +   🔑

New condition group +

Assistant says

B I ⌘ ⁒ 🖼 ♫ 🎦 ▣   </>

Please download and fill up the net banking requisition form and submit it to your home
branch.

                                              [User enters free text]

Net Banking

                              [Tᴛ Free text]

     ⇄ Go to action: **End**

3   1   is   [How do I register for Net Banking?]
     Please download and fill up the net banking
     requisition form and submit it to your home branch.
                              [Tᴛ Free text]

     ⇄ Go to action: **End**

4   1   is   [What are the features of Net Banking?]
     - Check the account statement online - Open a fixed
     deposit account - Pay utility bills such as water bill...
                              [Tᴛ Free text]

     ⇄ Go to action: **End**

5   1   is   [Facing errors in Net Banking?]
     Please contact our Customer care executive or
     approach the closest branch.
                              [Tᴛ Free text]

     ⇄ Go to action: **End**   ⎘   🗑

                              [New step   +]

Step 5 is taken   [with conditions ⌄]   [fₓ]

Conditions   1 condition   ⌃

If [All   ⌄]   of this is true:

     [1. What queries do ...]   [is]   [Facing errors in Net Banking?]   ✕

and   Add condition +   🔑

New condition group +

Assistant says

B I ⌘ ⁒ 🖼 ♫ 🎦 ▣   </>

Please contact our Customer care executive or approach the closest branch.

   [User enters free text]

Edit response   Edit validation

Net Banking

Tᴛ Free text

⮌ Go to action: **End**

3

1   is   How do I register for Net Banking?

Please download and fill up the net banking requisition form and submit it to your home branch.

Tᴛ Free text

⮌ Go to action: **End**

4

1   is   What are the features of Net Banking?

The following are the features of a net banking account: - Check the account statement online -...

Tᴛ Free text

⮌ Go to action: **End**

5

1   is   Facing errors in Net Banking?

Please contact our Customer care executive or approach the closest branch.

Tᴛ Free text

⮌ Go to action: **End**

---

and   Add condition +

New condition group +

Assistant says

B   *I*   ⊘   ⸾ᵒ   ▣   ♫   ▣   ▣   </>

The following are the features of a net banking account:
- Check the account statement online
- Open a fixed deposit account
- Pay utility bills such as water bills and electricity bills
- Make merchant payments
- Transfer funds
- Order a cheque book
- Buy general insurance
- Recharge prepaid mobile/DTH

User enters free text

Edit response   Edit validation   ⚙   ⇄   🗑

---

go to **Net Banking**

What queries do you have regarding Net banking?

What is Net Banking?

How do I register for Net Banking?

What are the features of Net Banking?

Facing errors in Net Banking?

How do I register for Net Banking?

Please download and fill up the net banking requisition form and submit it to your home branch.

okay

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:
 1. Income tax returns of...
Tr Free text
⇄ Go to action: End

3
1   is   Partnership
Please take the following documents and approach the closest branch
 1. Income tax returns of...
Tr Free text
↓ Continue to next step   ⎘ 🗑

1. What is your's company type?   is   Partnership   ×

and   Add condition +

New condition group +

Assistant says

B   I   ⬭   ⅛   ▦
Please take the followin

1. Income tax returns
2. Company Agreeme
3. Pan card for both p

Edit response   Edit v

And then

⇄ Go to another action   ⌄

Goes to action   Missing action. Edit settings.   ●

Settings   ×
Go to another action

Go to

End   × ⌄

☐ End this action after the other action is completed

| Cancel | Apply |