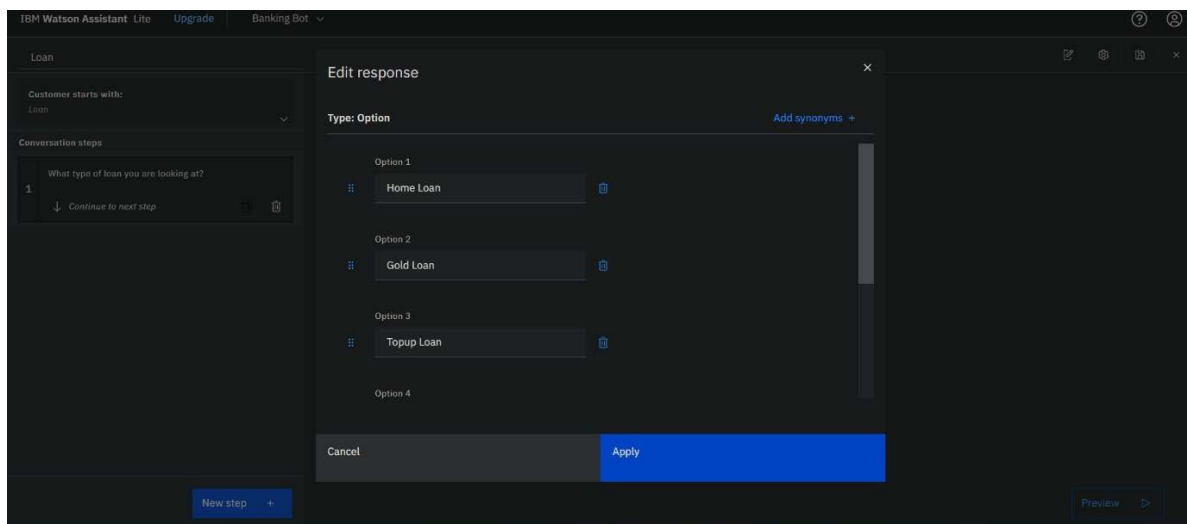
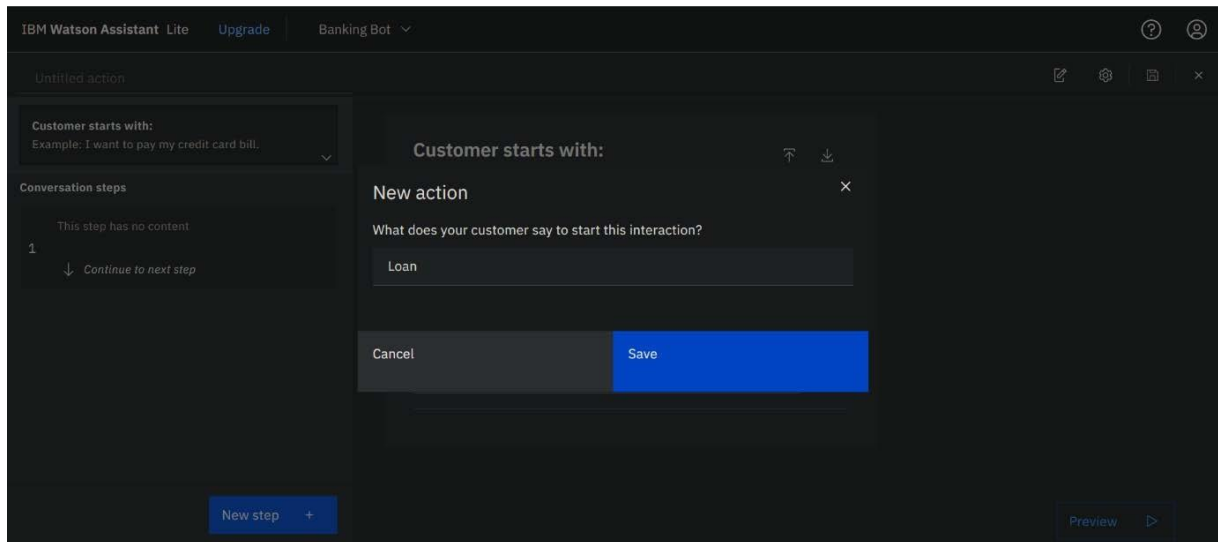


## Project Development Phase Sprint 2

Date	06 November 2022
Team ID	PNT2022TMID24619
Project Name	AI BASED DISCOURSE FOR BANKING INDUSTRY

### Screenshots of Sprint 2 Tasks:

#### Creating Loan Account Actions:



IBM Watson Assistant Lite Upgrade Banking Bot

Loan

What type of loan you are looking at?

1 Home Loan Student Loan +3

Continue to next step

1 is Gold Loan

Please approach the bank with the following documents:

2 Tr Free text

Go to action: End

1 is Topup Loan

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

3 Tr 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

Please approach the bank with the following documents:

- PAN Card
- Aadhaar Card
- Passport size photos

Preview

IBM Watson Assistant Lite Upgrade Banking Bot

Loan

Continue to next step

1 is Gold Loan

Please approach the bank with the following documents:

2 Tr Free text

Go to action: End

1 is Topup Loan

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

3 Tr 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

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

Preview

IBM Watson Assistant Lite Upgrade Banking Bot

Loan

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

3 Tr Free text

Go to action: End

1 is Vehicle Loan

Kindly approach the bank with the following documents:

4 Tr Free text

Go to action: End

1 is Student Loan

Please visit the nearest available bank with the following documents.

5

New step +

1. What typ... is Vehicle Loan

and Add condition +

New condition group +

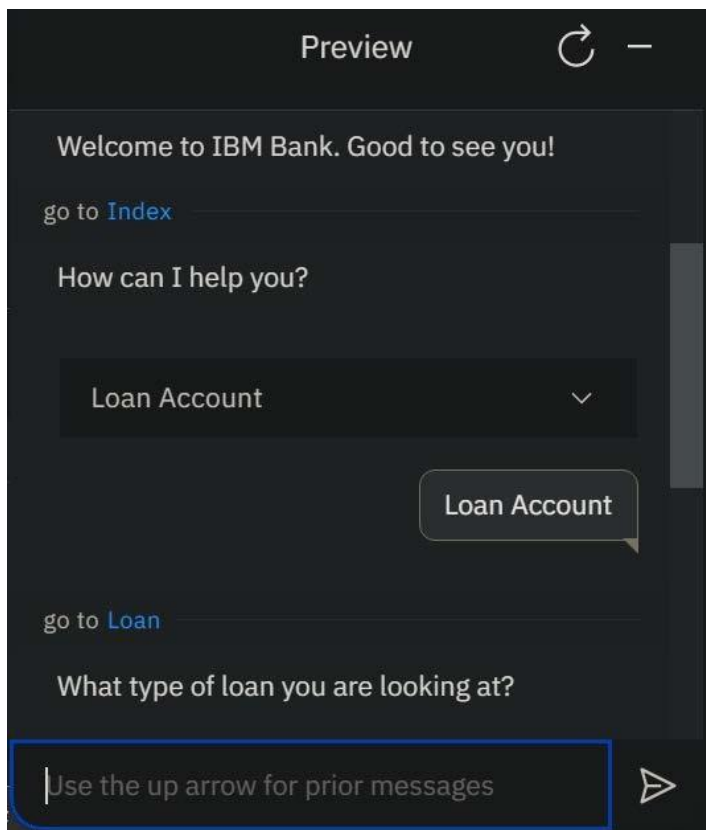
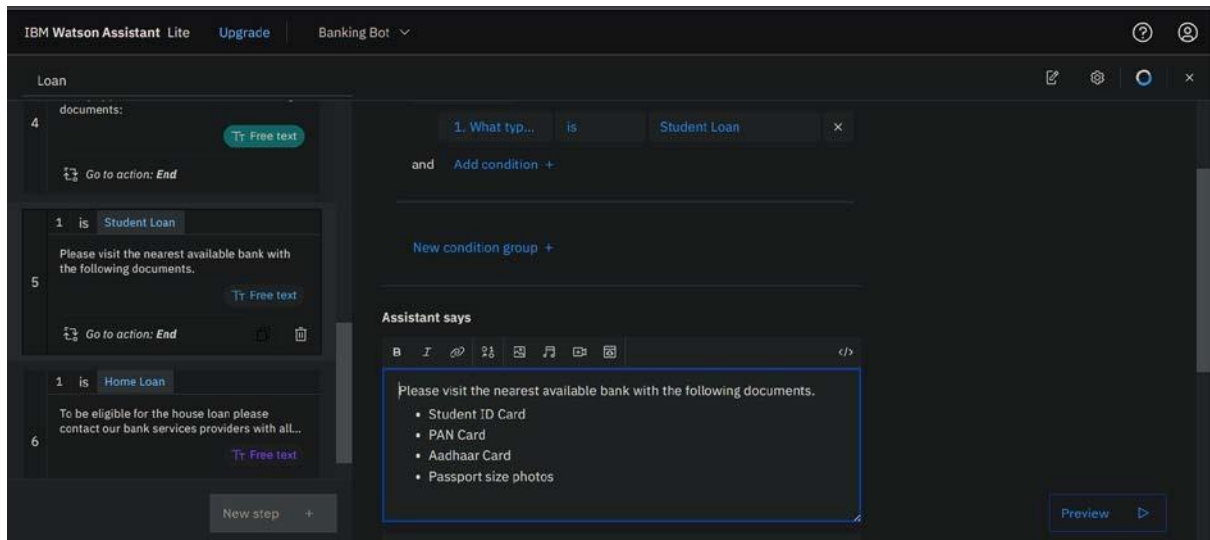
Assistant says

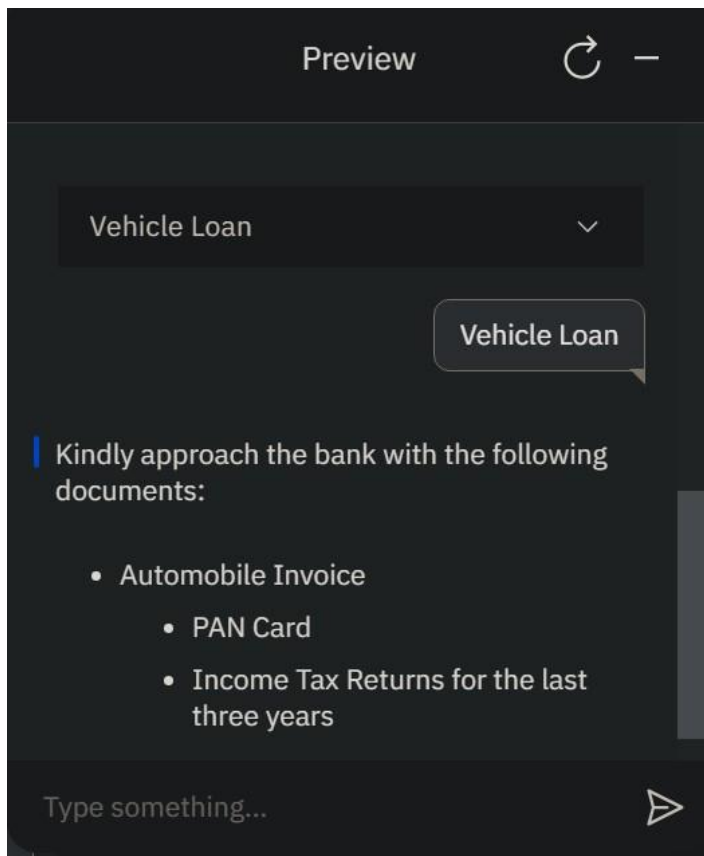
Kindly approach the bank with the following documents:

- Automobile Invoice
- PAN Card
- Income Tax Returns for the last three years

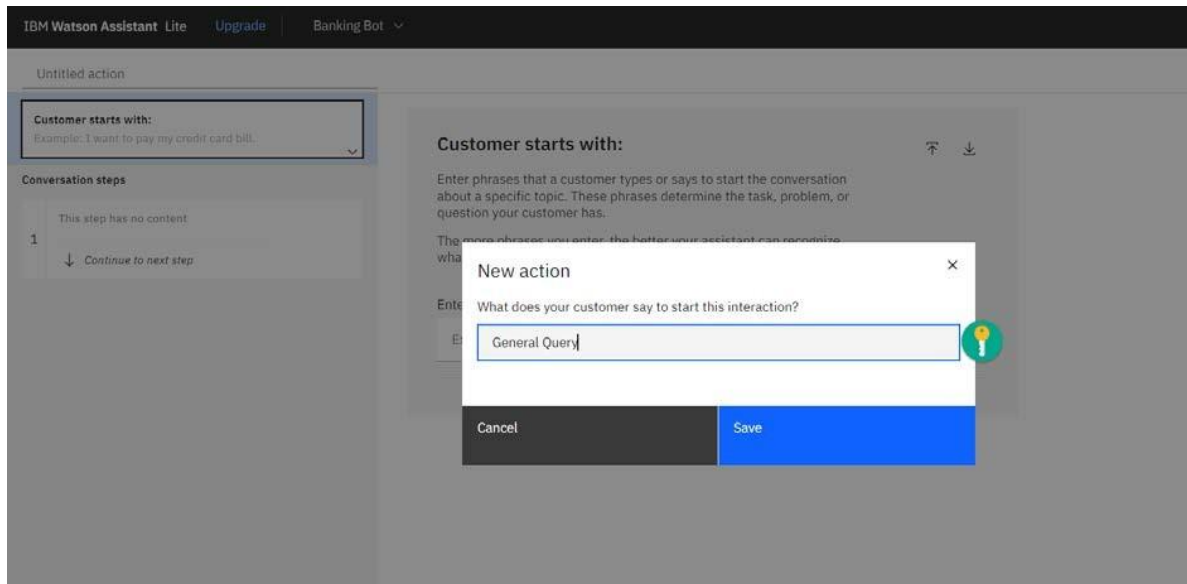
Preview

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...

[Try Free text](#)

↓ Continue to next step

Assistant says

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

Settings

Go to another action

Go to

☐ End this action after the other action is completed

Cancel Apply

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

x

and Add condition +

New condition group +

Assistant says

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

1 is Savings Account

This step has no content:

Go to action: Savings

1 is Current Account

This step has no content:

Go to action: Current

1 is General Queries

This step has no content:

Continue to next step

Step 4 is taken with conditions

Conditions 1 condition

If All of this is true:

1. How can I help yo...

is

General Queries

x

and Add condition +

New condition group +

Assistant says

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...

Free text

Go to action: End

3

1 is List of Branches

ADYAR,ALWARPET,ANNA NAGAR,AYANAVARAM,ASHOK NAGAR,EGMORE,RAMAPURAM,KK...

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 what your customer wants.

Enter

Ex

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...

Free text

Continue to next step

New step +

Step 2 is taken with conditions

Conditions1 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 Link Percent Image Audio Video GIF

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



IBM Watson Assistant LiteUpgradeBanking Bot

Net Banking

Customer starts with:  
Net Banking

Conversation steps

What queries do you have regarding Net banking?

1

What is Net B...How do I regi...+ 2

Continue to next step

1 is What is Net Banking?

The facility offered by the bank allows customers to use banking services over the internet. Customers ne...

2

Free text

Go to action: End

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.

3

Free text

Go to action: End

New step +

Step 3 is takenwith conditions

Conditions1 condition

IfAll of this is true:

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

andAdd 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

IBM Watson Assistant LiteUpgradeBanking Bot

Net Banking

Free text

Go to action: End

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.

3

Free text

Go to action: End

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...

4

Free text

Go to action: End

1 is Facing errors in Net Banking?

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

5

Free text

Go to action: End

New step +

Step 5 is takenwith conditions

Conditions1 condition

IfAll of this is true:

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

andAdd condition +

New condition group +

Assistant says

B I % & @

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

User enters free text

IBM Watson Assistant Lite   Upgrade   Banking Bot ▾

Net Banking

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.

3

Free text

Go to action: End

1 is What are the features of Net Banking?

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

4

Free text

Go to action: End

1 is Facing errors in Net Banking?

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

5

Free text

Go to action: End

and   Add condition +

New condition group +

Assistant says

B   I

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

Current

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: <br /> 1. Income tax returns of...

To Free text

Go to action: End

3

1 is Partnership

Please take the following documents and approach the closest branch <br /> 1. Income tax returns of...

To Free text

Continue to next step

1. What is your's company type?

is

Partnership

and Add condition

New condition group

Assistant says

Please take the following

1. Income tax returns

2. Company Agreement

3. Pan card for both

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