

Project Development Phase

AI-based discourse for Banking Industry

TEAM ID: PNT2022TMID48001

TEAM MEMBERS

ROLE	TEAM MEMBERS NAME	ROLL NO
TEAM LEADER	Dhanalakshmi.K	(912319104007)
TEAM MEMBER 1	Sangara Narayani.S	(912319104031)
TEAM MEMBER 2	Yamini.K	(912319104048)
TEAM MEMBER 3	Jeevitha.M.	(912319104016)

Project Development - Delivery Of Sprint-1

Sprint	Functional Requirement (Epic)	User Story Number	User Story / Task	Story Points	Priority	Team Members
Sprint-1	Create IBM Service	USN- 1	As an admin, I must create the required IBM service, Watson Assistant.	2	High	Dhanalakshmi Jeevitha
Sprint-1	Chatbot Skill Creation	USN- 2	As an admin, I can add welcoming messages, customer care executive contact information to the bot.	3	Medium	Sangara Narayani Yamini
Sprint-1	Creating Saving Account Action	USN-3	As an admin, I can add a response to create a new saving account.	5	High	Sangara Narayani Dhanalakshmi
Sprint-1	Creating Current Account Action	USN-4	As an admin, I can add a response to create a new current account.	5	High	Yamini Jeevitha
Sprint-1	Greeting Message	USN-5	As a user, I can receive welcoming messages from the bot.	2	Low	Jeevitha Sangara Narayani

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-1	17	6 Days	24 Oct 2022	29 Oct 2022	17	01 Nov 2022

Create IBM Watson Assistant Service

Task assigned: Dhanalakshmi , Jeevitha

Task started on: 26 - 10 - 2022

Task completion date: 27 - 10 - 2022


Progress 1: Registered for an IBM cloud account and set up the IBM Watson Assistant Service.

IBM Watson Assistant Lite Upgrade

Learning center ?

Welcome to the new Watson AssistantNext

CreatePersonalizeCustomizePreview

 Create your first assistant

Let's get your assistant up and running. Name your assistant, add a description, and choose a language. In following steps we'll gather more information, show you basic customizations, and give you a preview of what your assistant will look like.

Assistant name

Example: Banking Bot

Your assistant name will be kept internally and not visible to your customers

Description (optional)0/128

Add a description for this assistant

CREATE GREETINGS, QUERY SUGGESTIONS, AND ENDOF-CONVERSATION SKILLS

Task assigned: Sangara Narayani. S , Yamini.K

Task started on: 27 - 10 - 2022

Task completion date: 28 - 10 - 2022

IBMCloud Account CreationIBM-Project-3272-16585100IBM Watson Service PageIBM Watson Assistant

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2Fcef4b477367b4b93b5d75fa3982828de%3A0177b65a...

IBM Watson Assistant Trial30 days leftExtend trialbanking botLearning center ?

Actions

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

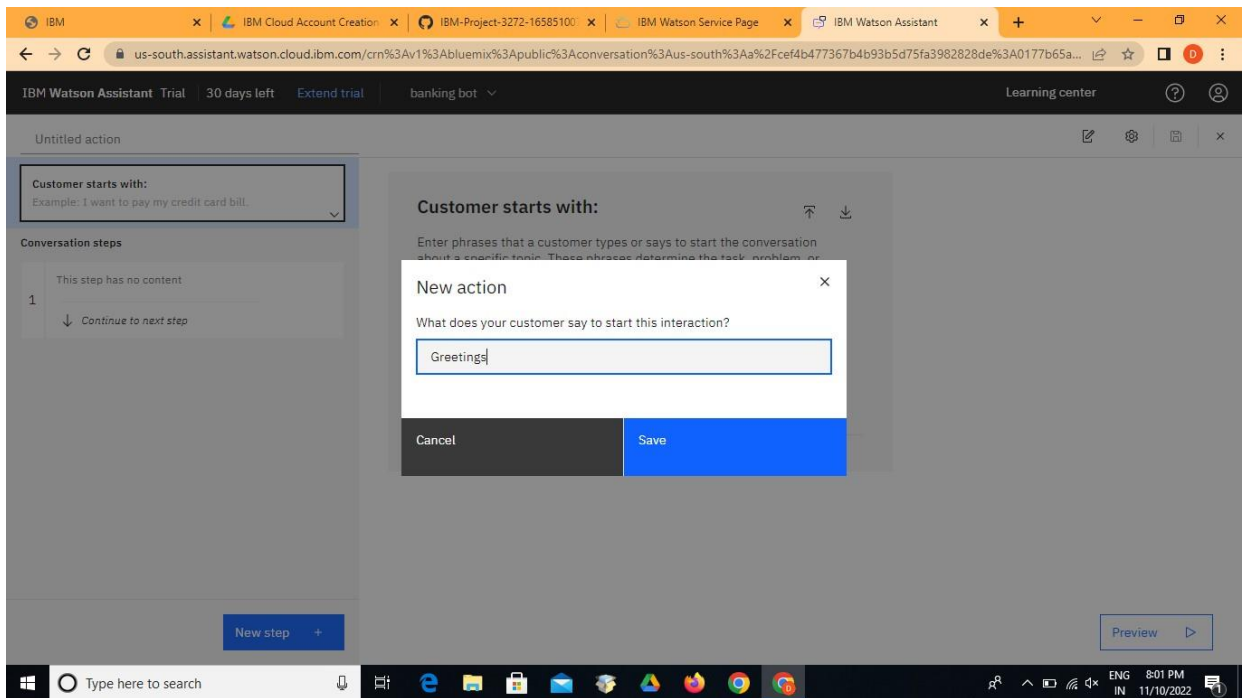
Saved responses

Create your first action

With actions, you can help your customers accomplish their goals.

Create action +

Preview

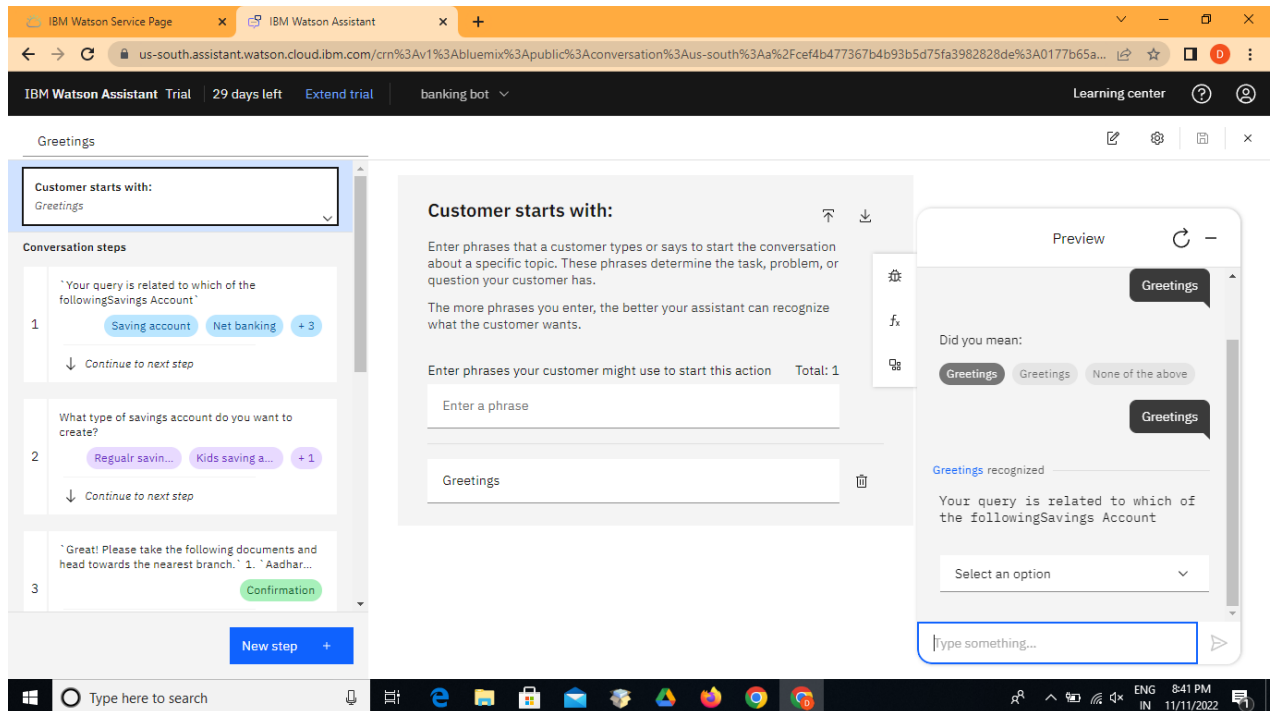


Progress 2:

If the customer starts a greeting with Hey, Hello, or Hi, welcome then the Watson Assistant Chatbot responds with "Nice to meet you."

CREATE GREETINGS, Saving account, Current account

Task assigned: Sangara Narayani , Dhanalakshmi



Task started on: 28 - 10 - 2022

Task completion date: 29 - 10 - 2022

Progress 3:

Following that, the Index Action Watson Assistant Chatbot will ask the customer "How can I help you?" and provide a list of options serving as savings account, current account, loan account, general query, and net banking.



The screenshot displays the IBM Watson Assistant interface. The top navigation bar includes the IBM logo, a trial status indicator (29 days left), and a 'banking bot' dropdown menu. The main workspace is divided into three panels:

- Left Panel (Greetings):** A list of conversation steps. Step 4 shows a greeting message: "Welcome!! how can I help you? Your query is related to which of the following?". Below the message are buttons for "General enquiry", "current account", and a "+3" button. Step 5 asks "What is your company type?" with buttons for "proprietorship" and "partnership". Step 6 provides instructions: "Please take the following documents to the closest branch." followed by a list of documents and a "Confirmation" button.
- Center Panel (Customer starts with):** A section for defining customer phrases. It includes a text area for "Enter phrases that a customer types or says to start the conversation about a specific topic..." and a "Total: 1" indicator. Below this is a "Greetings" button.
- Right Panel (Preview):** A preview of the chatbot's response. It shows a message: "Your query is related to which of the following Savings Account". Below this is a "Select an option" dropdown menu with the following options: "Savings account", "Current account", "General query", "Loan query", and "Net banking".

The bottom of the screenshot shows a Windows taskbar with various application icons and a system clock indicating 9:26 PM on 11/11/2022.


Saving Account:

Preview

Your query is related to which of the following Savings Account

Saving account



Saving account

What type of savings account do you want to create?


Regular saving account

Kids saving account



Zero balance saving account

Zero balance saving account

Use the up arrow for prior messages



Preview

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

1. Aadhar Card
2. Pan Card
3. Passport size photos

Do you want to know about some other service?


Yes

No

Yes



Welcome!! how can I help you?
Your query is related to which of the following?

Type something...



Current Account:

Preview

current account

current account

What is your company type?

proprietorship

partnership

partnership

Please take the following documents to the closest branch.

1. Income Tax Returns of the proprietor for the last 3 years

2. Company Agreement

Type something...

Please take the following documents to the closest branch.

1. Income Tax Returns of the proprietor for the last 3 years

2. Company Agreement

3. Pan Card of both partners

Do you want to know about some other service

Yes

No

No

Nice to meet you!!!

✓

 Action complete

Type something...

Task assigned: Yamini , Jeevitha

Task started on: 28 - 10 - 2022

Task completion date: 29 - 10 - 2022

Progress 4:

Created an end action for properly ending the conversation with customers and asking them, "Do you want to know about some other services?" If the customer's response is "yes," then show the index action; else display "Nice to meet you"

