Project Development Phase
Sprint 2

Date	05 October 2022
Team ID	PNT2022TMID12183
Project Name	AI BASED DISCOURSE FOR BANKING INDUSTRY

Screenshots of Sprint 2 Tasks:

Creating Loan Account Actions:
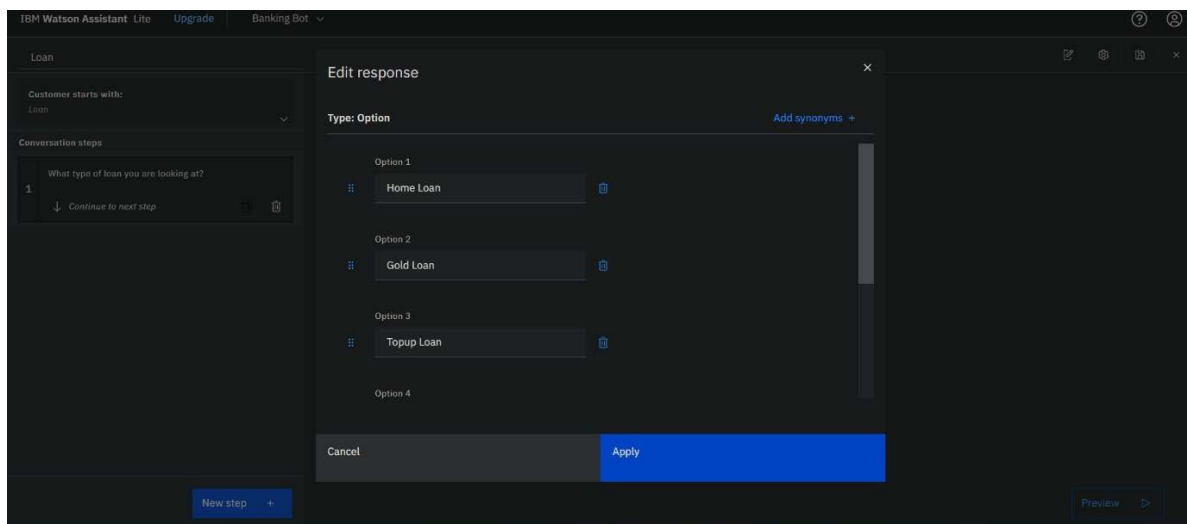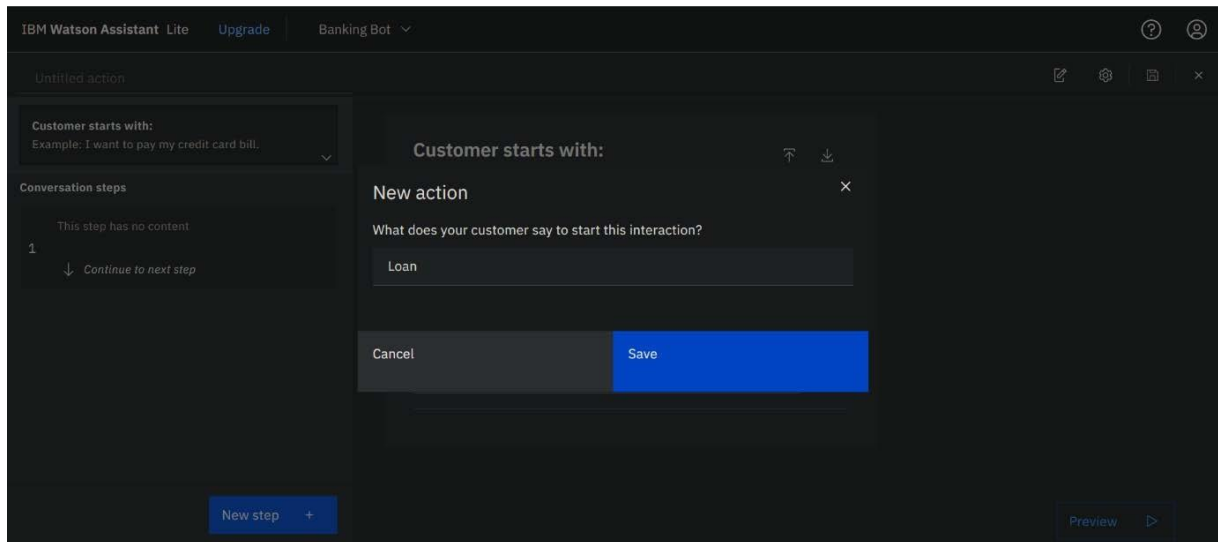
Screen 1

IBM **Watson Assistant** Lite | Upgrade | Banking Bot ⌄

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 Lcan | ✕

and Add condition +

New condition group +

Assistant says

B I ⌗ ⅛ ⊡ ♫ ⬛ ⬚ </>

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

Preview ▷

Screen 2

IBM **Watson Assistant** Lite | Upgrade | Banking Bot ⌄

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 ⌗ ⅛ ⊡ ♫ ⬛ ⬚ </>

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

Preview ▷

Screen 3

IBM **Watson Assistant** Lite | Upgrade | Banking Bot ⌄

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 +
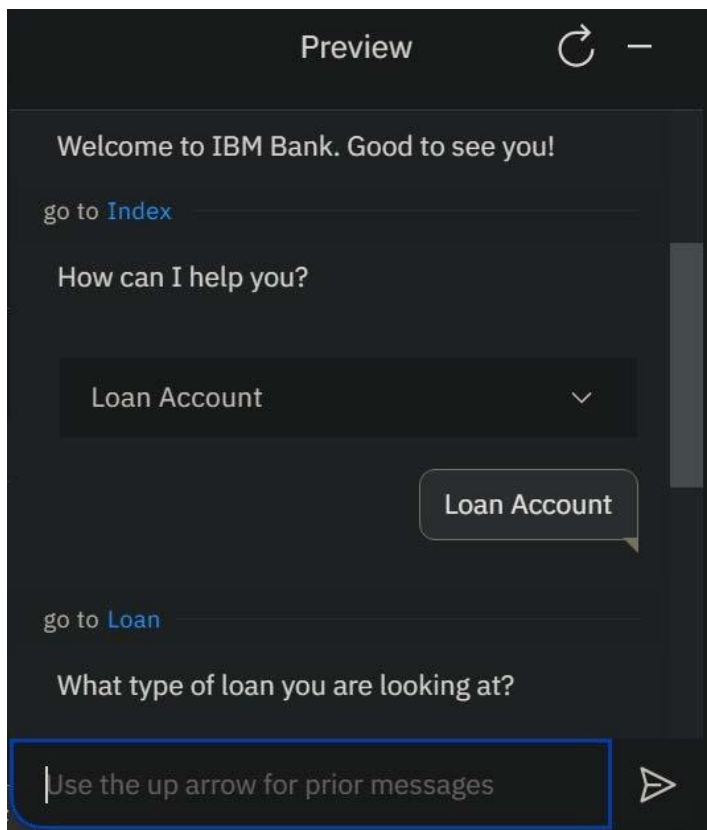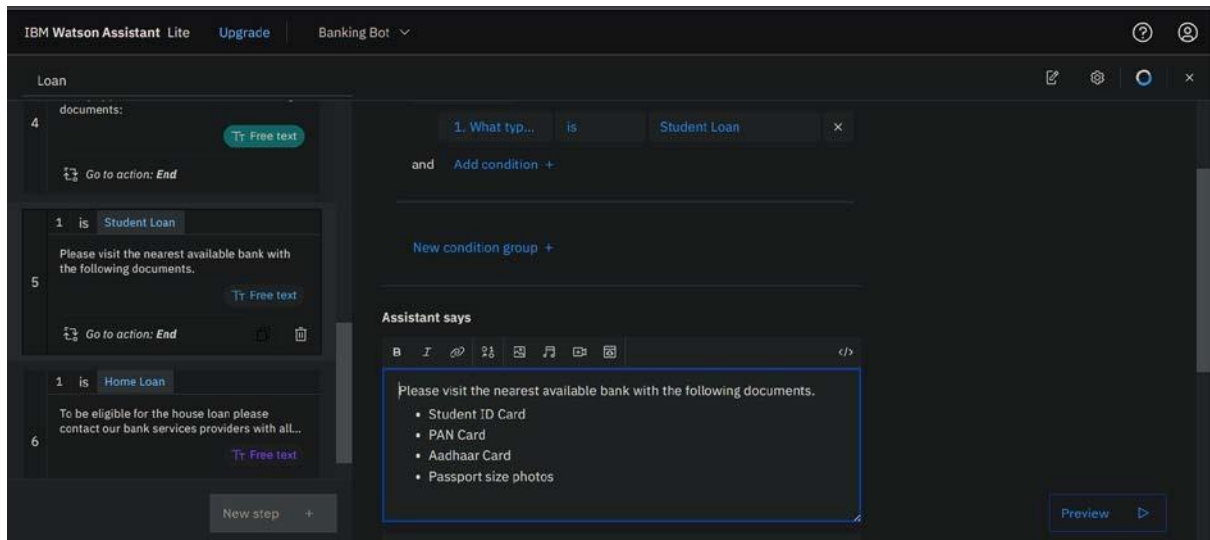
New condition group +

Assistant says

B I ⌗ ⅛ ⊡ ♫ ⬛ ⬚ </>

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

IBM Watson Assistant Lite   Upgrade   Banking Bot ∨

Loan

4   documents:
     T⊤ Free text
     ⇄ Go to action: **End**

1   is   Student Loan

5   Please visit the nearest available bank with
     the following documents.
     T⊤ Free text
     ⇄ Go to action: **End**

1   is   Home Loan

6   To be eligible for the house loan please
     contact our bank services providers with all...
     T⊤ Free text

New step   +

1. What typ...   is   Student Loan   ×

and   Add condition +

New condition group +

Assistant says

B *I* 🔗 ⋮⋮ ▣ ♫ ▭ ▣   </>

Please visit the nearest available bank with the following documents.
  • Student ID Card
  • PAN Card
  • Aadhaar Card
  • Passport size photos

Preview ▷

Preview   ↻   —

Welcome to IBM Bank. Good to see you!

go to Index

How can I help you?

Loan Account   ∨

                              Loan Account

go to Loan

What type of loan you are looking at?

Use the up arrow for prior messages   ▷

Creating General Query Action:

Edit response
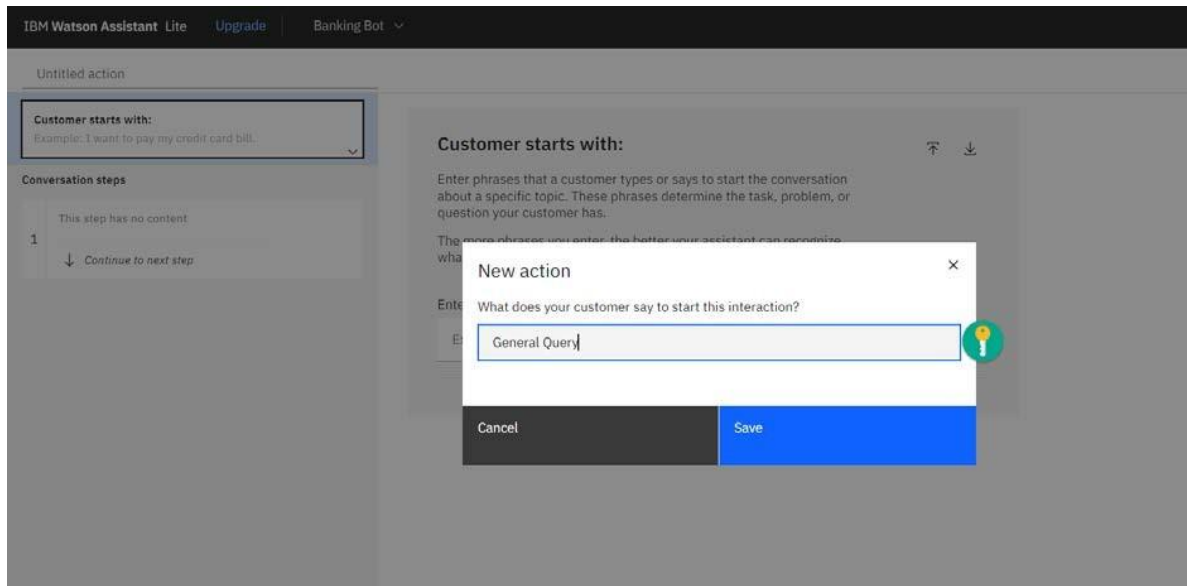
Type: Option   Add synonyms +

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

     1   is   Bank Working Days

2   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   & ½   🖼 🎵 🎥 🖼   </>

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

Edit re...

And then

Cancel   Apply

⧉ G...   ∨

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 ⊘ ⅗ ▣ ♫ ▣ ▣   </>

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 ⊘ ⅗ ▣ ♫ ▣ ▣   </>

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.

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...
   Tт Free text
   ⇄ Go to action: **End**

3. 1 is List of Branches
   ADYAR,ALWARPET,ANNA NAGAR,AYANAVARAM,ASHOK NAGAR,EGMORE,RAMAPURAM,KK...
   Tт 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 ⌄   *f*x

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

What queries do you have regarding Net banking?

1   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

⮌ 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.

T⊤ Free text

⮌ Go to action: **End**   🗐   🗑

New step   +

Step 3 is taken   with conditions ⌄   ƒₓ

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* �ø ⁙ 🖼 🎵 🎦 🔳   </>

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

User enters free text

Net Banking

T⊤ 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.

T⊤ 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...

T⊤ 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.

T⊤ Free text

⮌ Go to action: **End**   🗐   🗑

New step   +

Step 5 is taken   with conditions ⌄   ƒₓ

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* �ø ⁙ 🖼 🎵 🎦 🔳   </>

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 �
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   ⌀   ≡   ▦

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 |