# Project Development Phase
## Sprint 2

| Date | 21 November 2022 |
|------|------------------|
| Team ID | PNT2022TMID25140 |
| Project Name | AI BASED DISCOURSE FOR BANKING INDUSTRY |

## Screenshots of Sprint 2 Tasks:

### Creating Loan Account Actions:
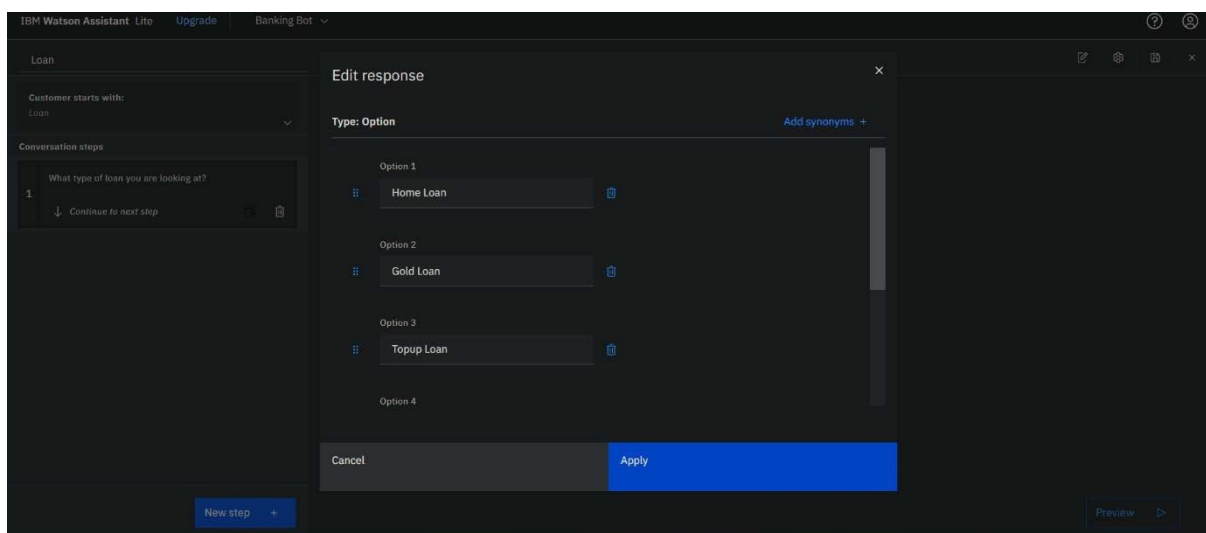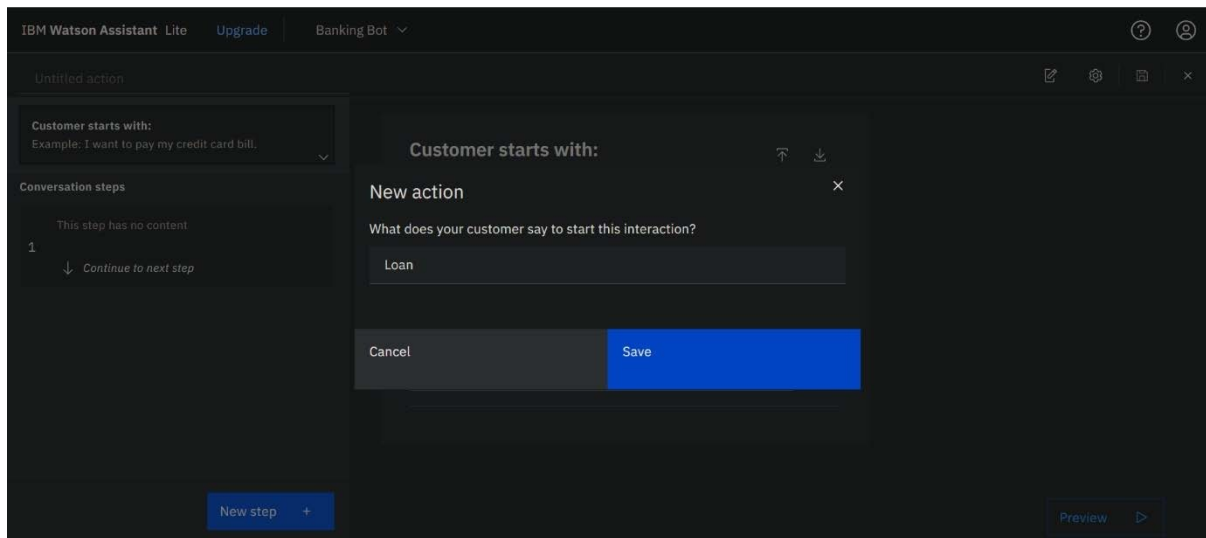
Loan      ✎   ⚙   🖫   ✕

**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:
Tr 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...
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**

B   I   ⊘   ⅗   ⊡   ♫   ▷   ⧉    </>

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:
Tr 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...
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**

B   I   ⊘   ⅗   ⊡   ♫   ▷   ⧉    </>

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

**4**   1   is   Vehicle Loan
Kindly approach the bank with the following documents:
Tr 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 +

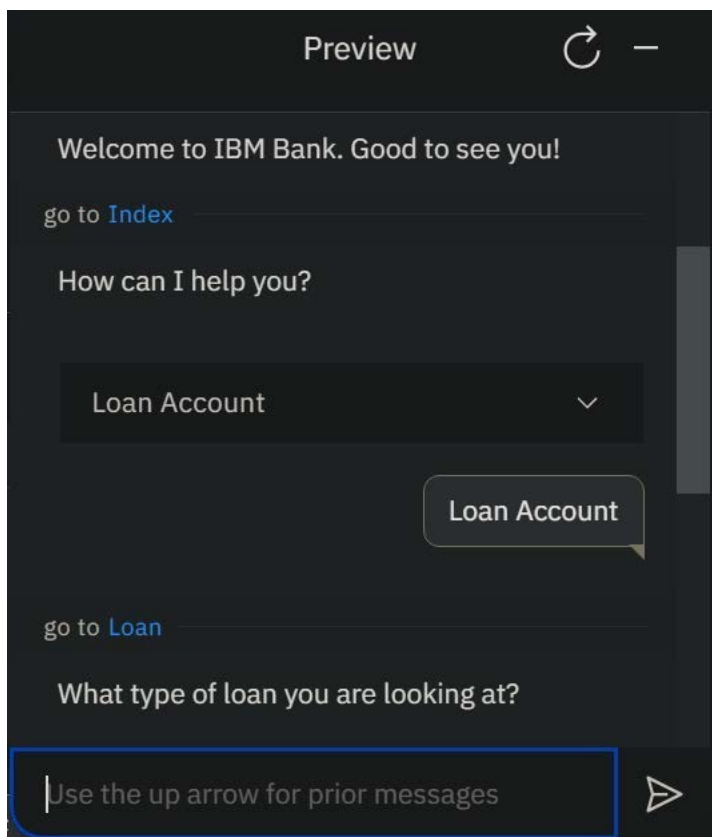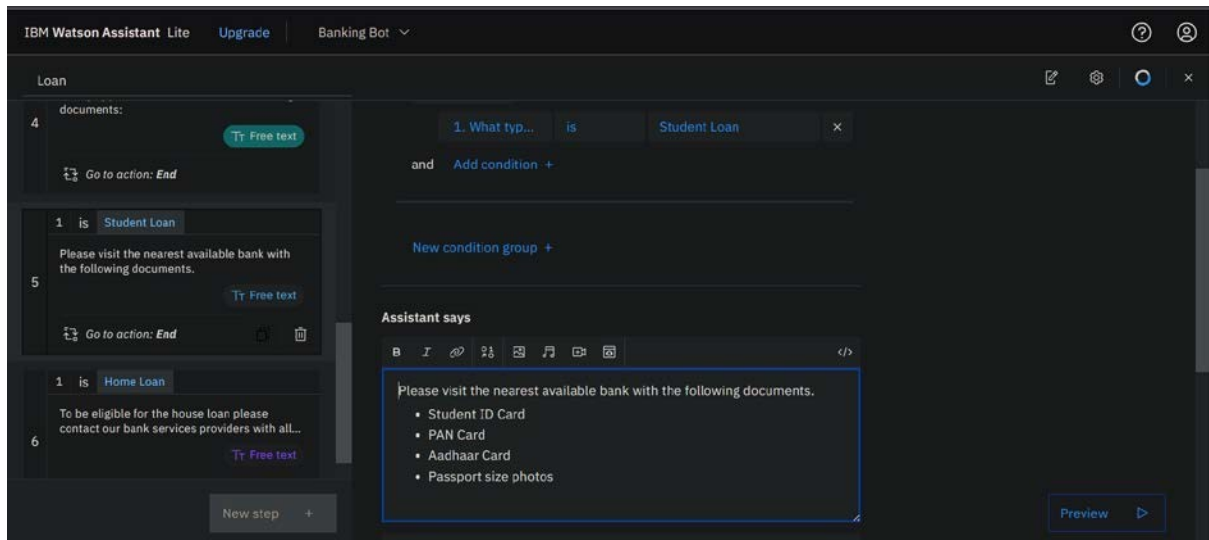New condition group +

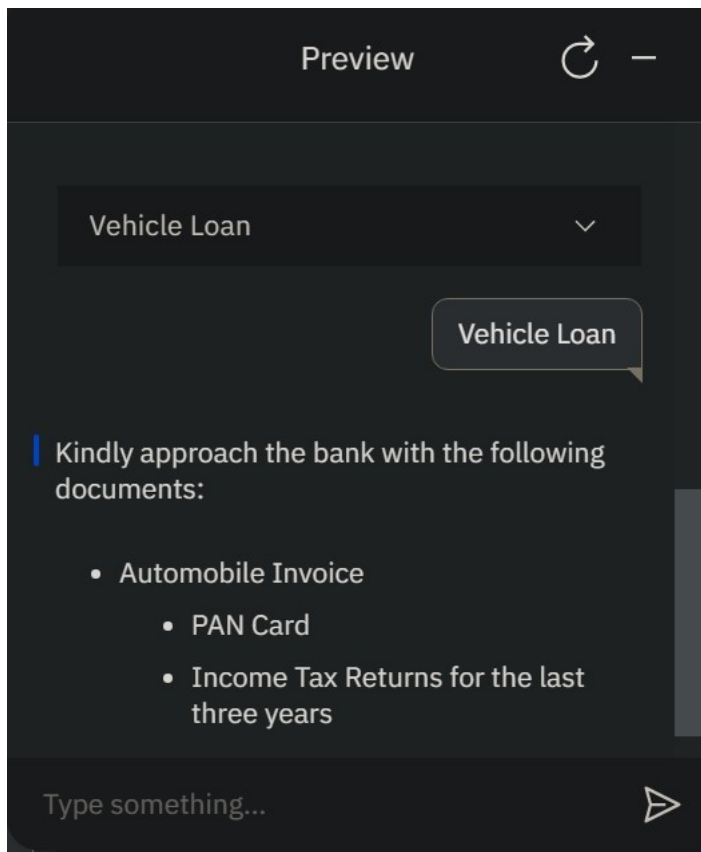**Assistant says**

B   I   ⊘   ⅗   ⊡   ♫   ▷   ⧉    </>

Kindly approach the bank with the following documents:
- Automobile Invoice
- PAN Card
- Income Tax Returns for the last three years

User enters free text

Preview ▷

Loan

**4**
documents:

Tᴛ Free text

⇆ Go to action: **End**

**5**
1   is   Student Loan

Please visit the nearest available bank with
the following documents.

Tᴛ Free text

⇆ Go to action: **End**

**6**
1   is   Home Loan

To be eligible for the house loan please
contact our bank services providers with all...

Tᴛ Free text

New step   +

---

1. What typ...   is   Student Loan   ✕

and   Add condition +

New condition group +

**Assistant says**

B   I   ⊘   ⅛   ▣   ♫   ▣   ▣     </>

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   ▷

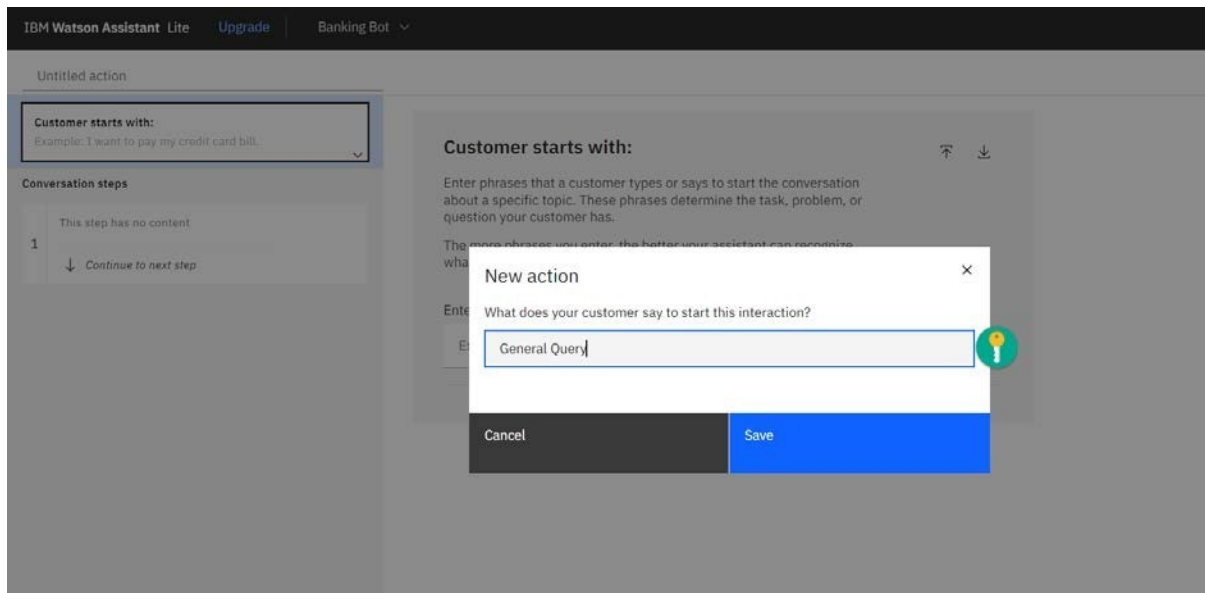**Creating General Query Action:**

## 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*

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  ∂P  ⅗  🖼  🎵  📷  🔲                         </>

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

Edit re...

**And then**

Settings                                            ×

## Go to another action

Go to

End                                              ×  ∨

☐ 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  ✕

and  Add condition +

New condition group +

**Assistant says**

B  I  ⊘  ⅔  ⊠  ♫  ▣  ▣                   &lt;/&gt;

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  ⊘  ⅔  ⊠  ♫  ▣  ▣                   &lt;/&gt;

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.

**Creating Netbanking Action:**

## 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*                      ⎘   🗑

---

1   is   [What is Net Banking?]

   The facility offered by the bank allows customers to
2  use banking services over the internet. Customers ne...
                                              [Tᴛ Free text]

   ⮌ *Go to action: End*

---

1   is   [How do I register for Net Banking?]

   Please download and fill up the net banking requisition
3  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*  ⊘  ₀ᵇ  🖼  🎵  📹  🔲                          </>

   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*

---

1   is   [How do I register for Net Banking?]

   Please download and fill up the net banking
3  requisition form and submit it to your home branch.
                                              [Tᴛ Free text]

   ⮌ *Go to action: End*

---

1   is   [What are the features of Net Banking?]

   - Check the account statement online - Open a fixed
4  deposit account - Pay utility bills such as water bill...
                                              [Tᴛ Free text]

   ⮌ *Go to action: End*

---

1   is   [Facing errors in Net Banking?]

   Please contact our Customer care executive or
5  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*  ⊘  ₀ᵇ  🖼  🎵  📹  🔲                          </>

   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

What is your's company type?

Proprietorship   Partnership

1

↓  Continue to next step

1   is   Proprietorship

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

2

Tr Free text

⟷ Go to action: End

1   is   Partnership

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

3

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 return
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