Project Development Phase
Sprint 2

Date	05 October 2022
Team ID	PNT2022TMID38077
Project Name	AI BASED DISCOURSE FOR BANKING INDUSTRY

Screenshots of Sprint 2 Tasks:

Creating Loan Account Actions:
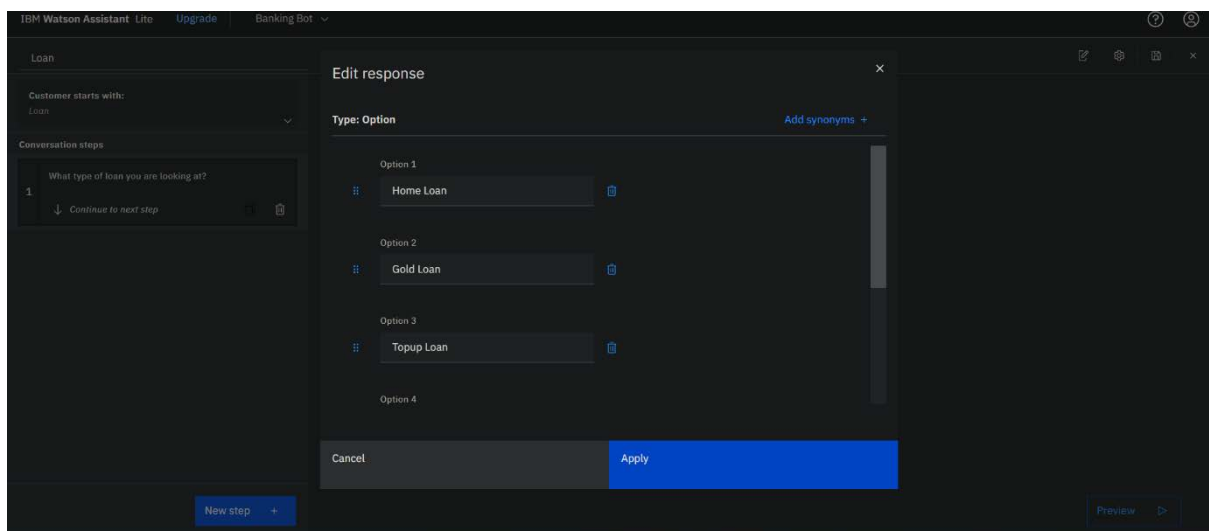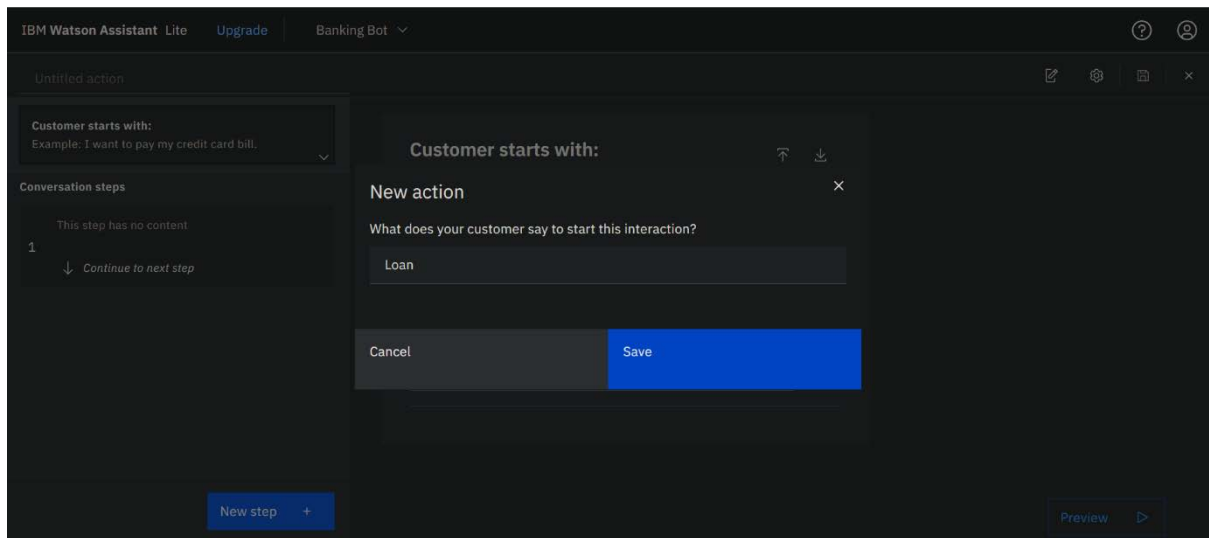
Loan   ✎ ⚙ 💾 ✕

What type of loan you are looking at?

1   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* 🔗 🔢 🖼 🎵 🎦 🔲   </>

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* 🔗 🔢 🖼 🎵 🎦 🔲   </>

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   ✕
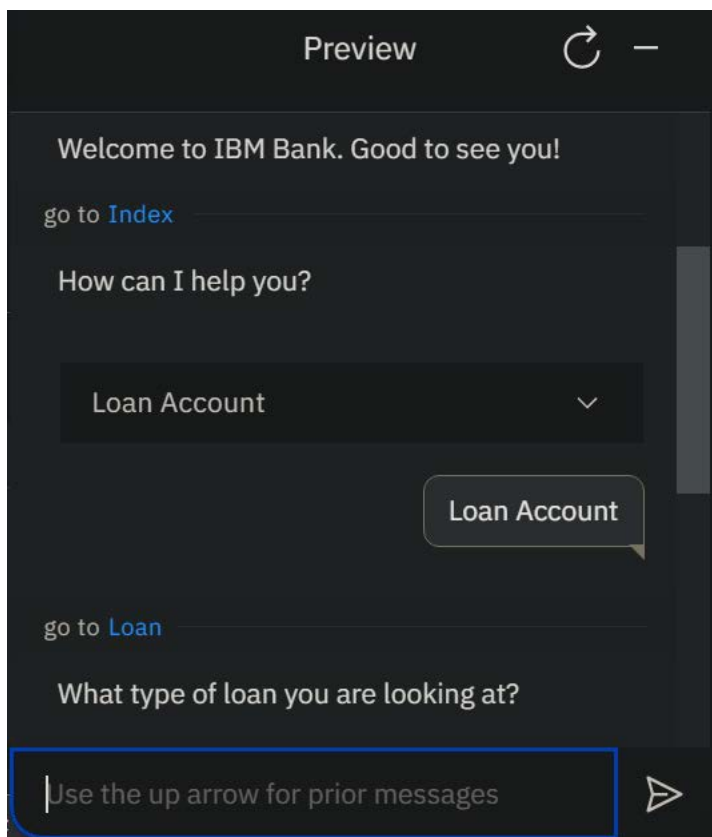
and   Add condition +

New condition group +

Assistant says

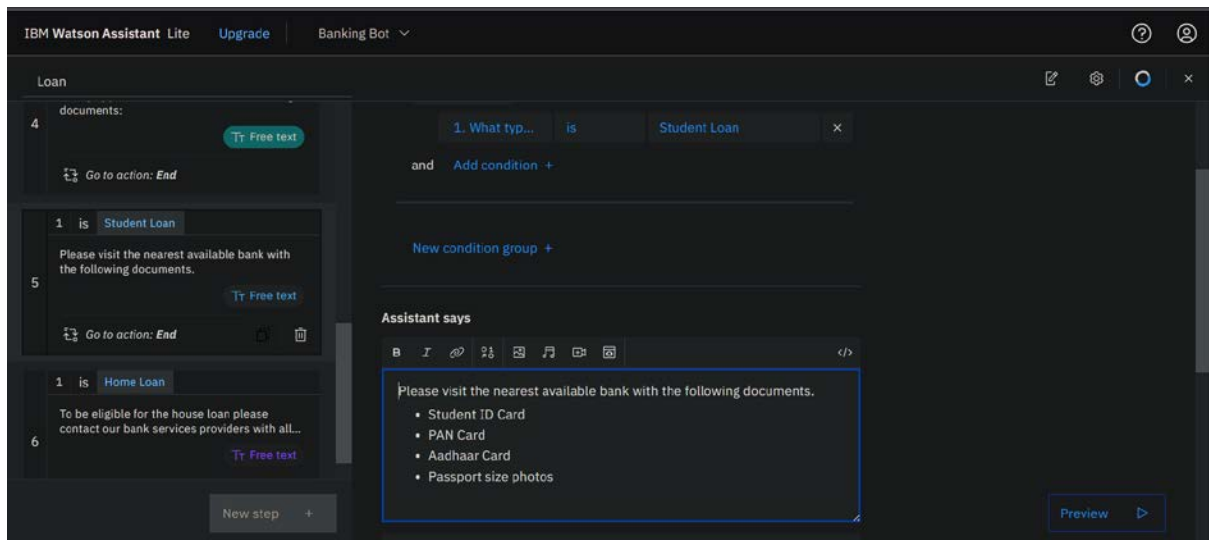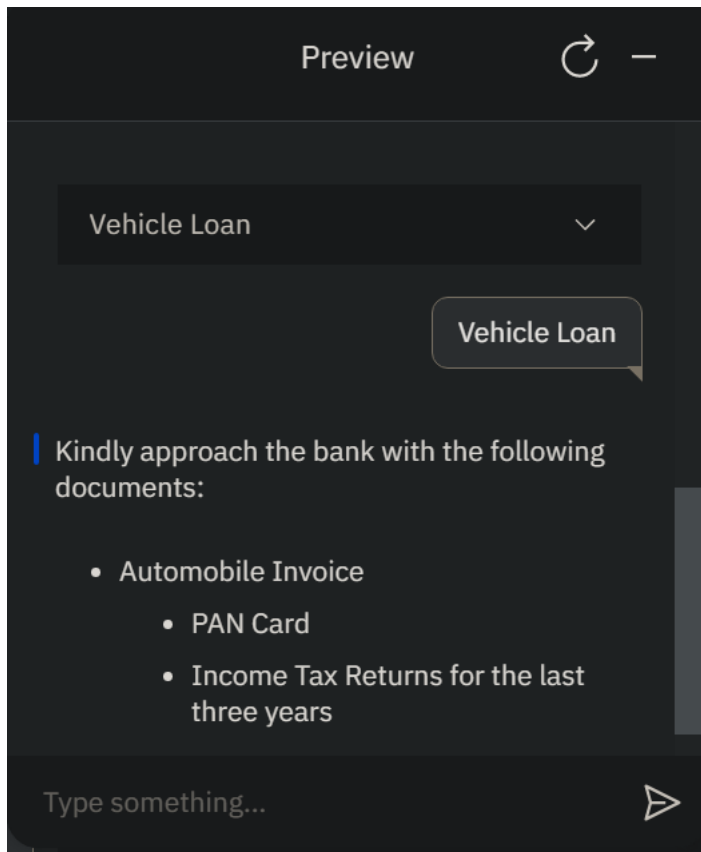B *I* 🔗 🔢 🖼 🎵 🎦 🔲   </>

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* 🔗 ⅔ ⊡ ♫ ⊡◦ ⊡   </>

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   ➤
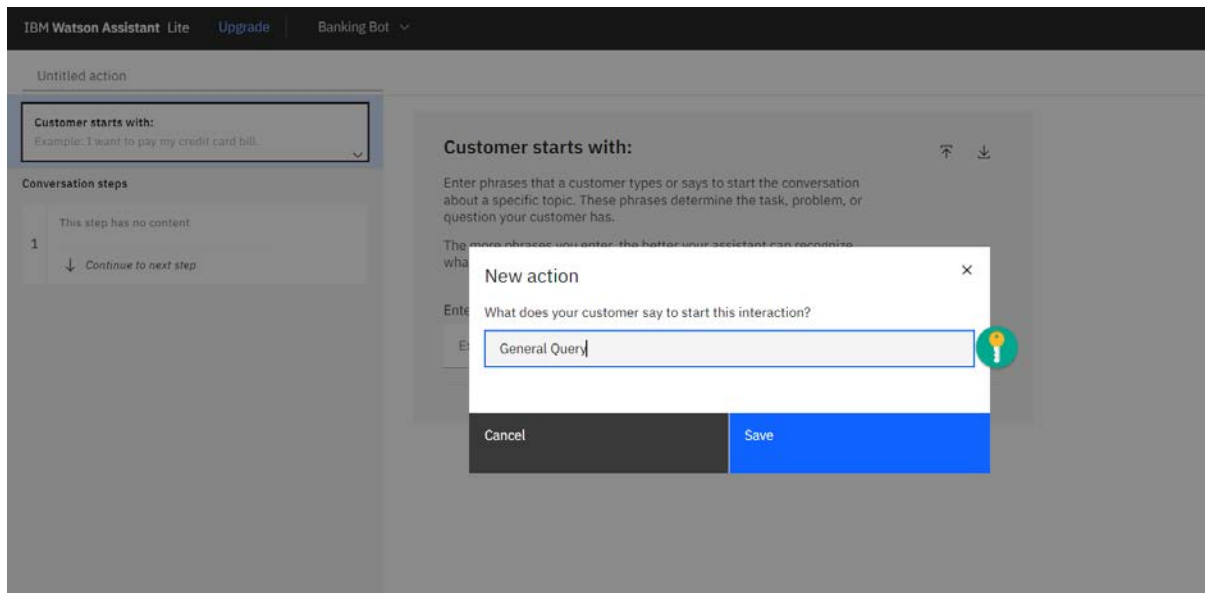
Creating General Query Action:

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 ∂ ⅔ 🖼 🎵 🎬 🔲   </>

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   × ⌄

☐ 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 ⊘ ⅜ ⊞ ♫ ▣ ▣   </>

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 ▾]   [ƒₓ]

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 ⊘ ⅜ ⊞ ♫ ▣ ▣   </>

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...
    [Tᴛ Free text]
    ↓ Continue to next step

New step +

Step 2 is taken   [with conditions ∨]   [fₓ]

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 ⌄   *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

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 ⌄   *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* 🔗 ⚏ 🖼 🎵 ▶ ⊡   </>

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   ⚙ ⇄ 🗑

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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?   is   Partnership   ✕

and   Add condition +

New condition group +

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   ⬚ 🗑

Assistant says

B   *I*   🔗   ⇅   🖽   •

Please take the following

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