

Project Development Phase

Sprint 1

Date	29 October 2022
Team ID	PNT2022TMID38077
Project Name	AI BASED DISCOURSE FOR BANKING INDUSTRY

Screenshots of Sprint 1 Tasks:

Create IBM Watson Assistant Service:

IBM Watson Assistant Lite Upgrade

Welcome to the new Watson Assistant [Next](#)

Create Personalize Customize Preview

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

Banking Bot

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

Description (optional) 0/128

IBM Watson Assistant Lite Upgrade Banking Bot

Welcome to the new Watson Assistant [Back](#) [Next](#)

Where do you plan on deploying your assistant?

Web

Tell us about yourself

This information will be used to personalize your onboarding experience.

Which industry do you work in?

Banking and financial services

What is your role on the team building the assistant?

Developer

Which statement describes your needs best?

I'm using Watson Assistant to complete a course or certif

Do you have the Speed Demons in stock?

The Speed Demons are in stock at our Downtown and Northgate locations, which are both within five miles of you.

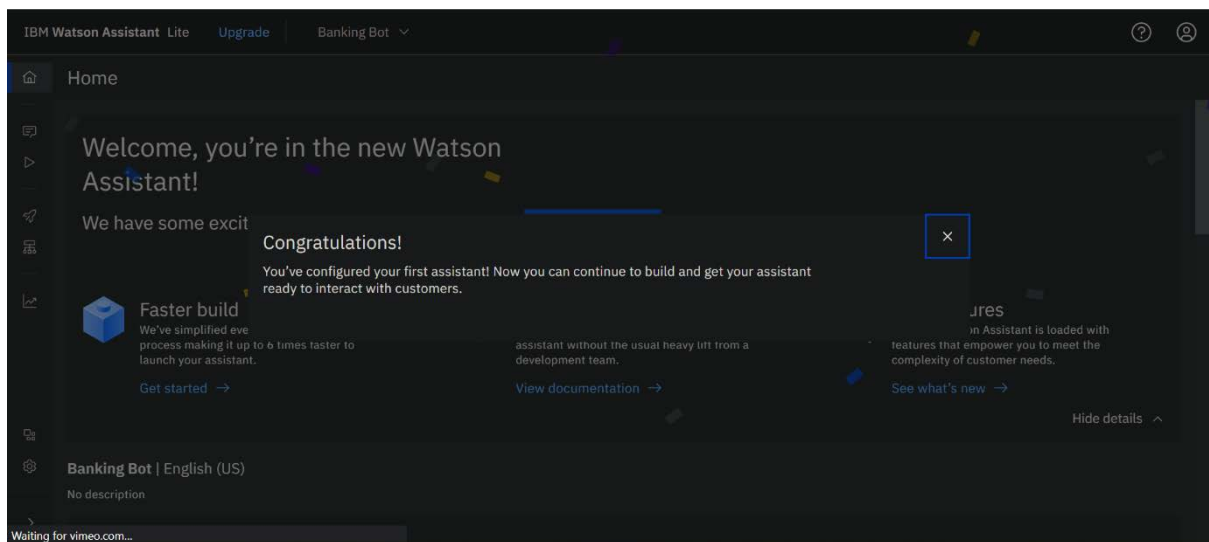
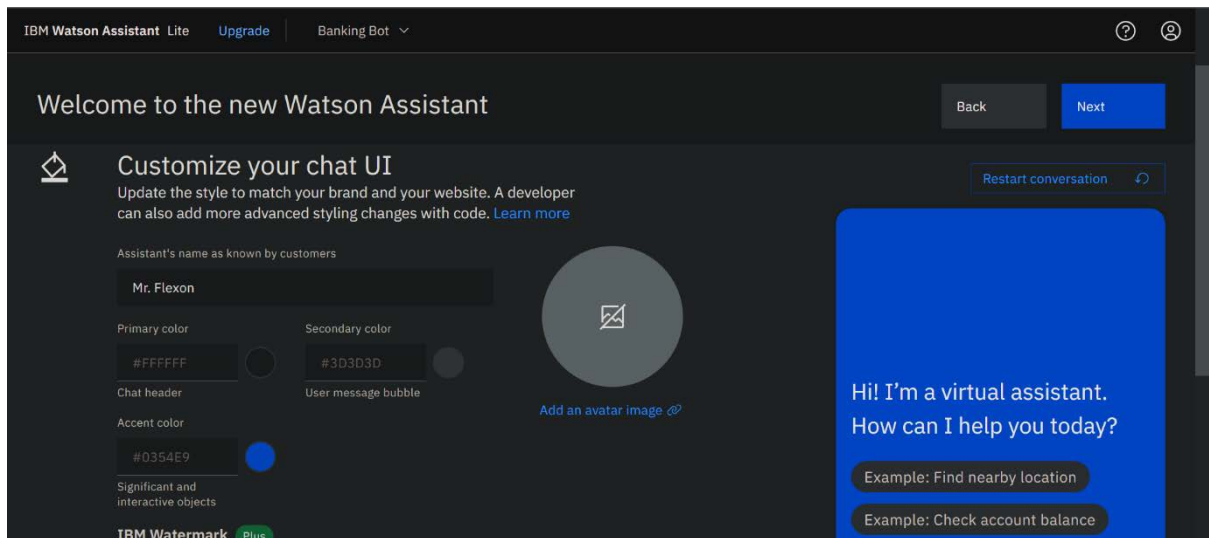
What size and color do you need?

I'm looking for a size nine in white

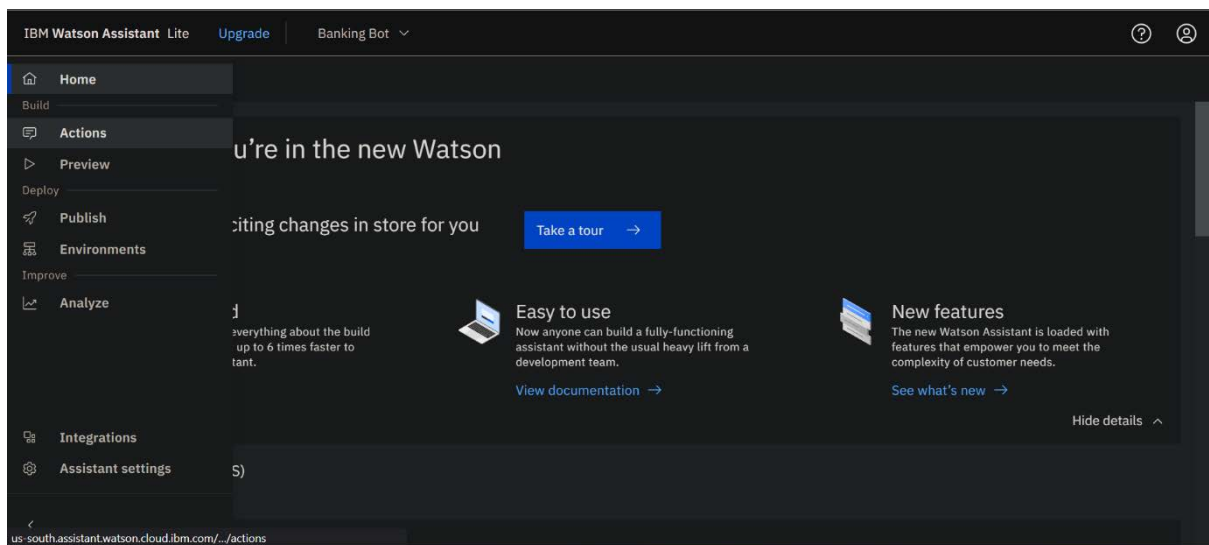
Great news! The Speed Demons are available in white in a size 9.

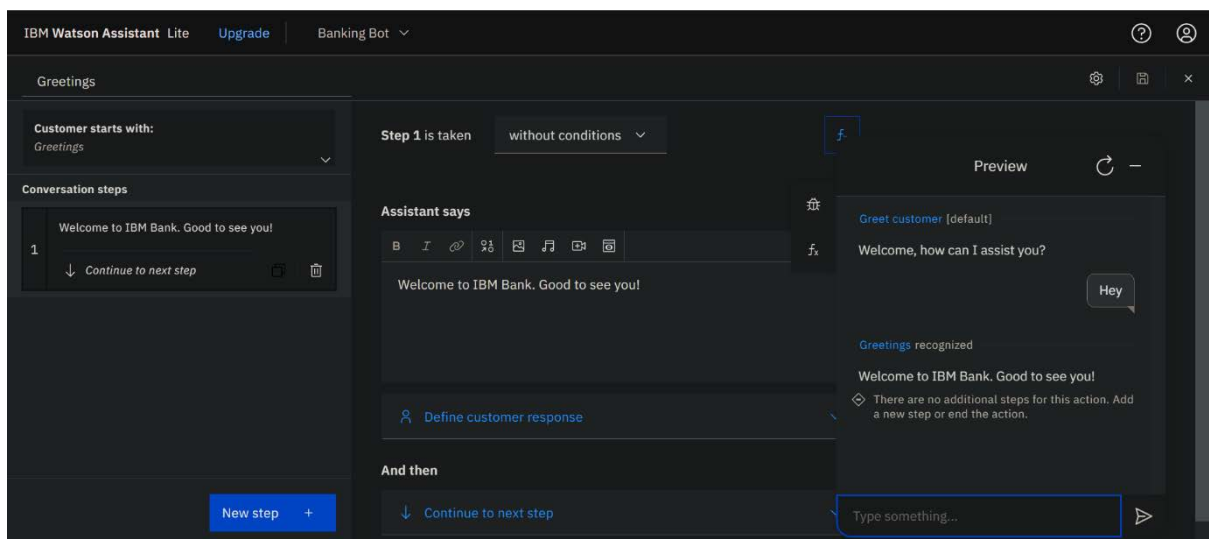
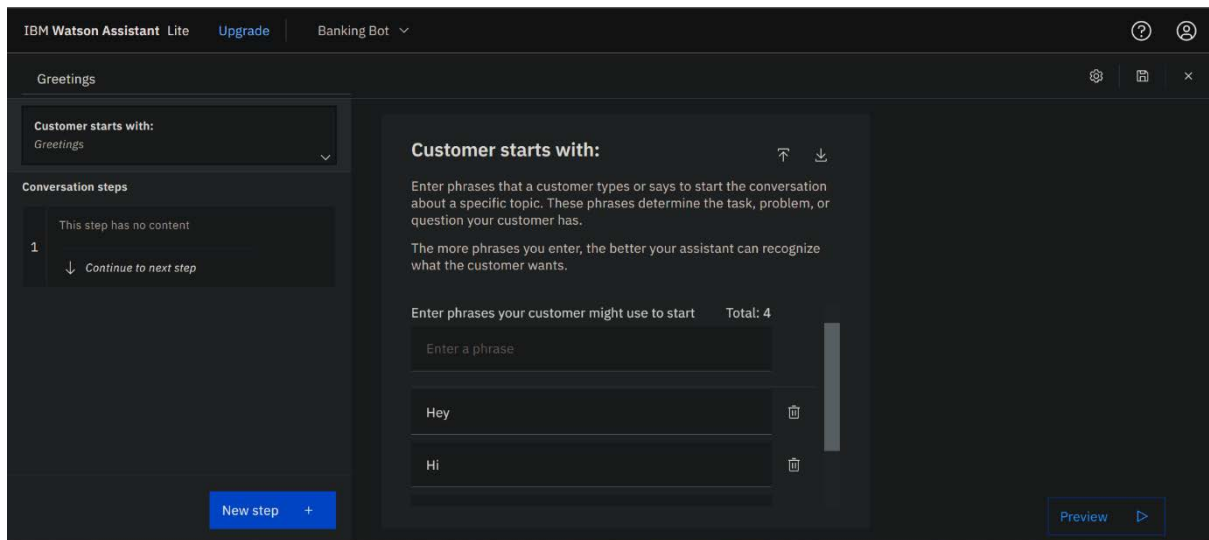
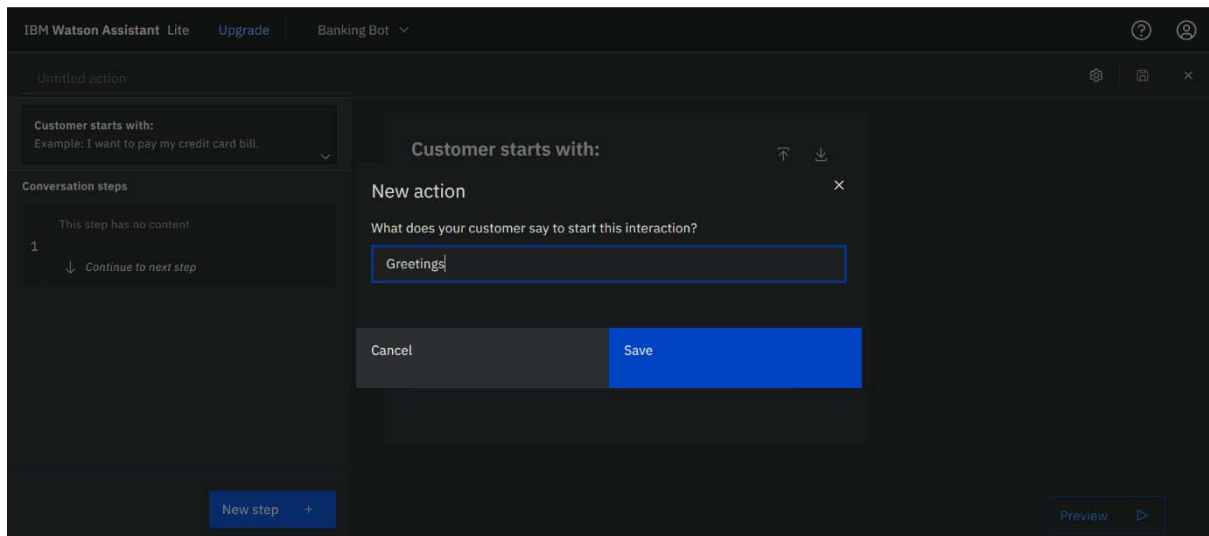
You can purchase them for curbside pick up or we can ship them to you. Which would you prefer?

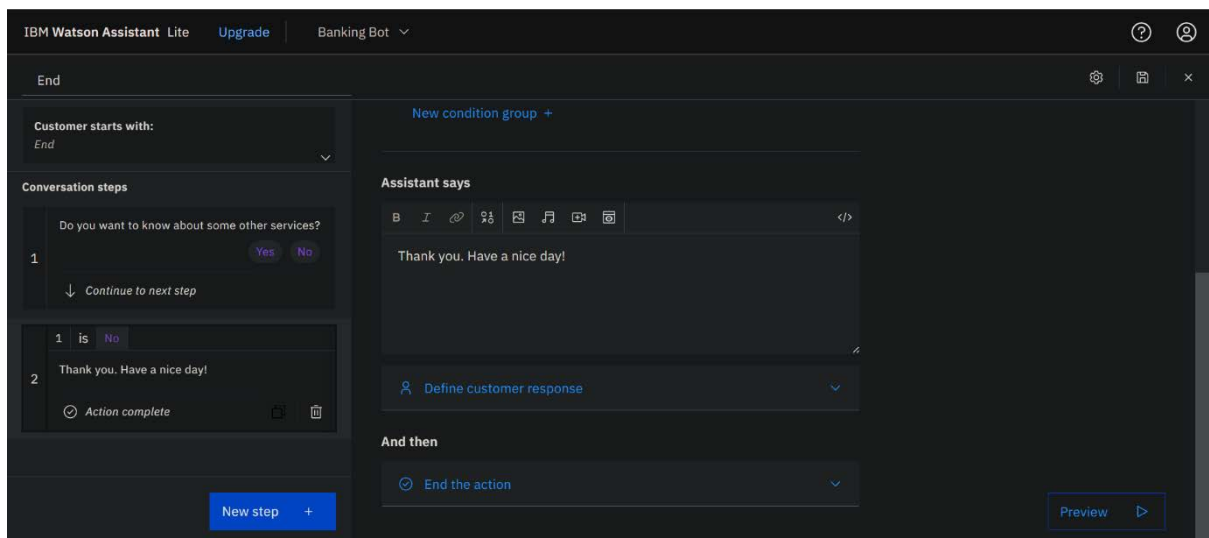
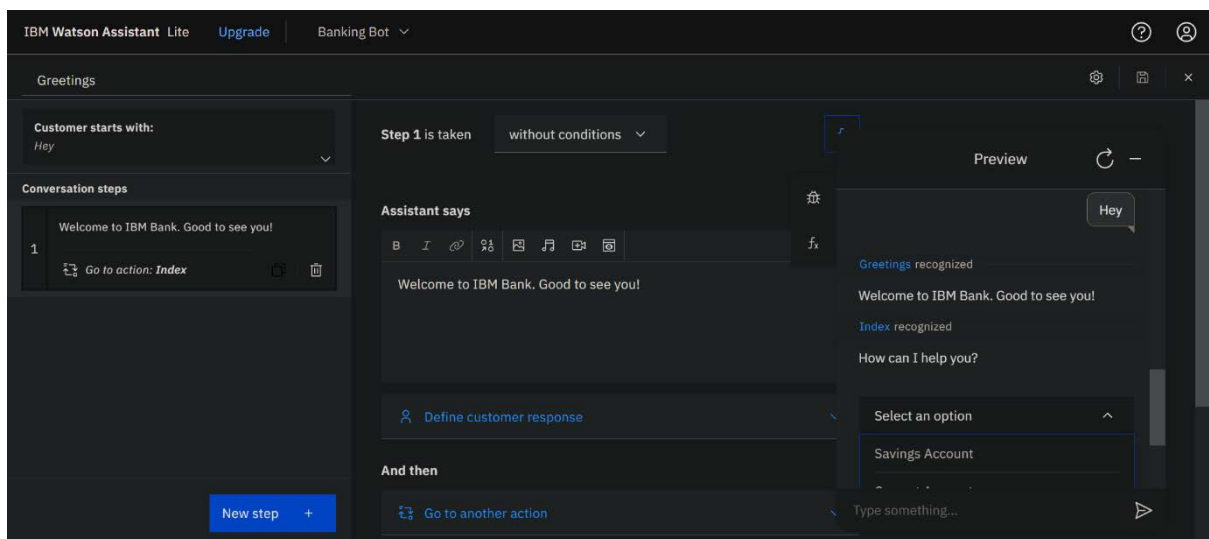
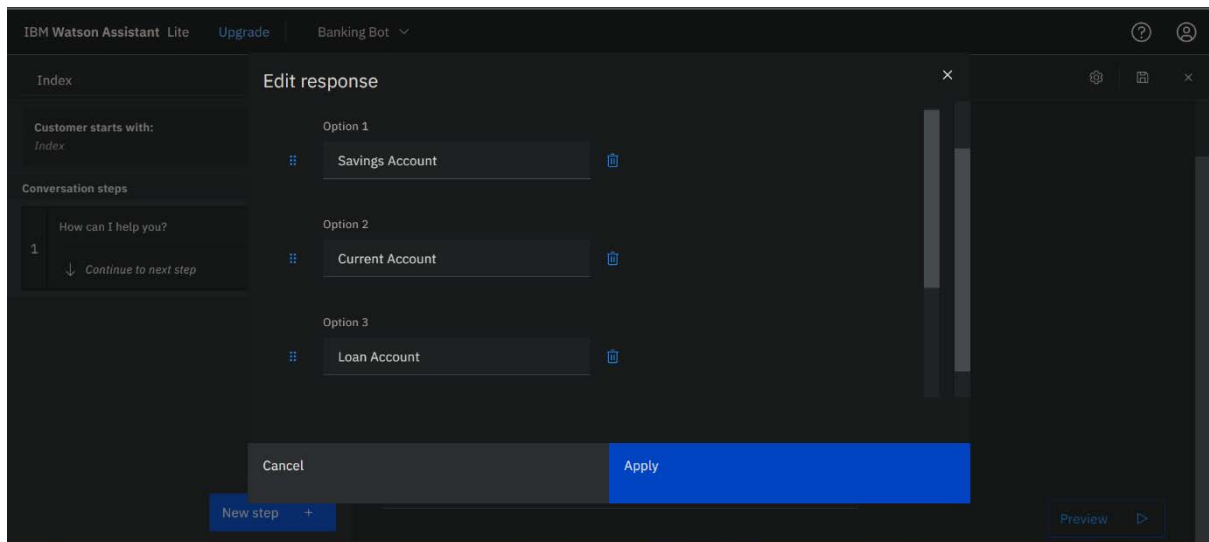
I'll pick them up! Ship them to me, please!



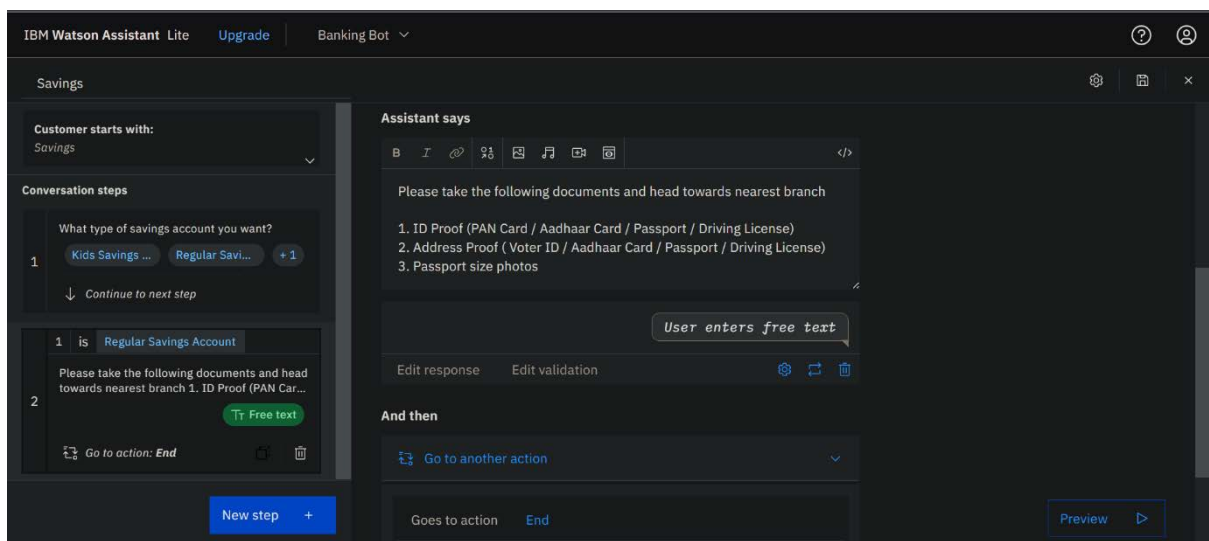
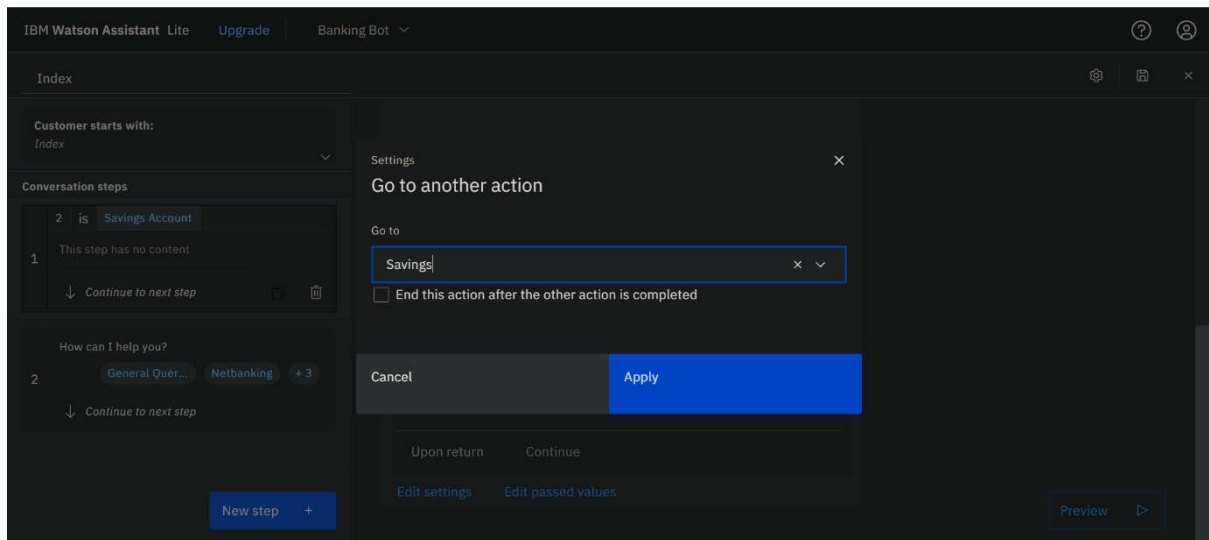
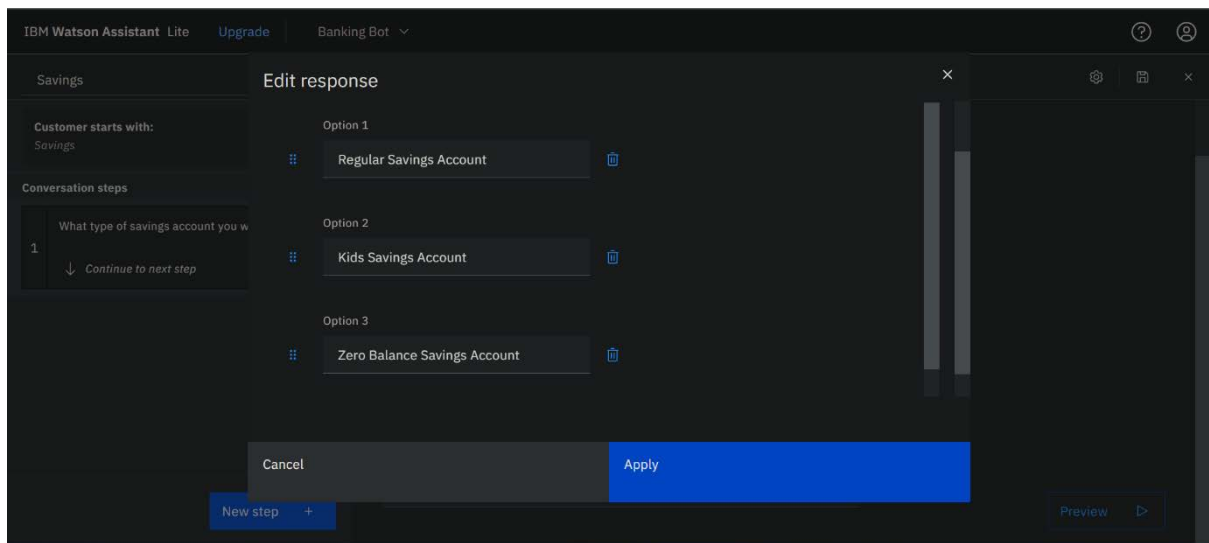
Chatbot Skills Creation:

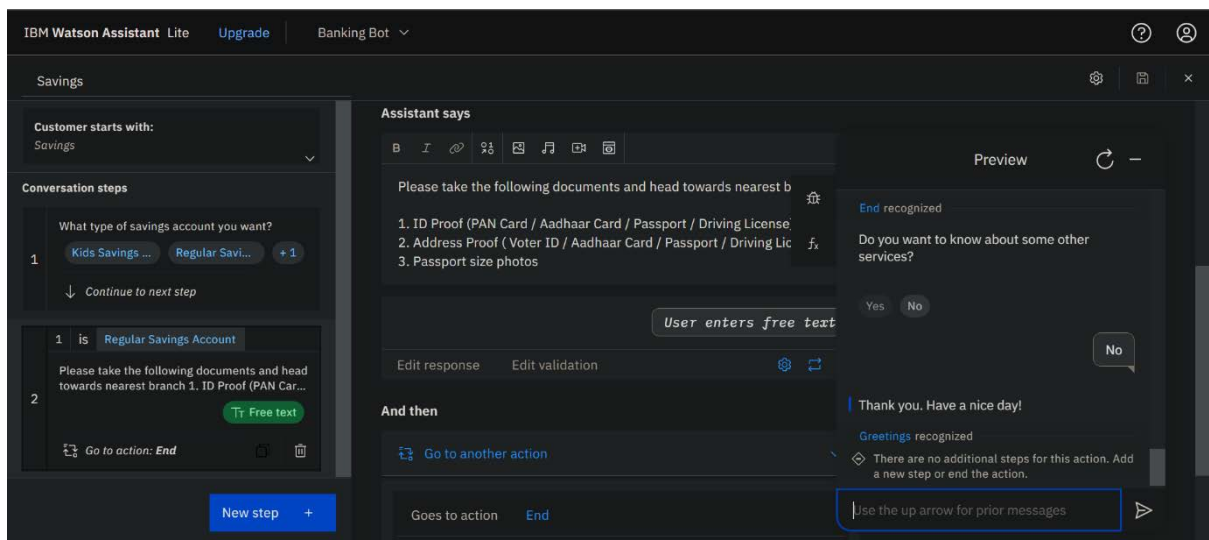
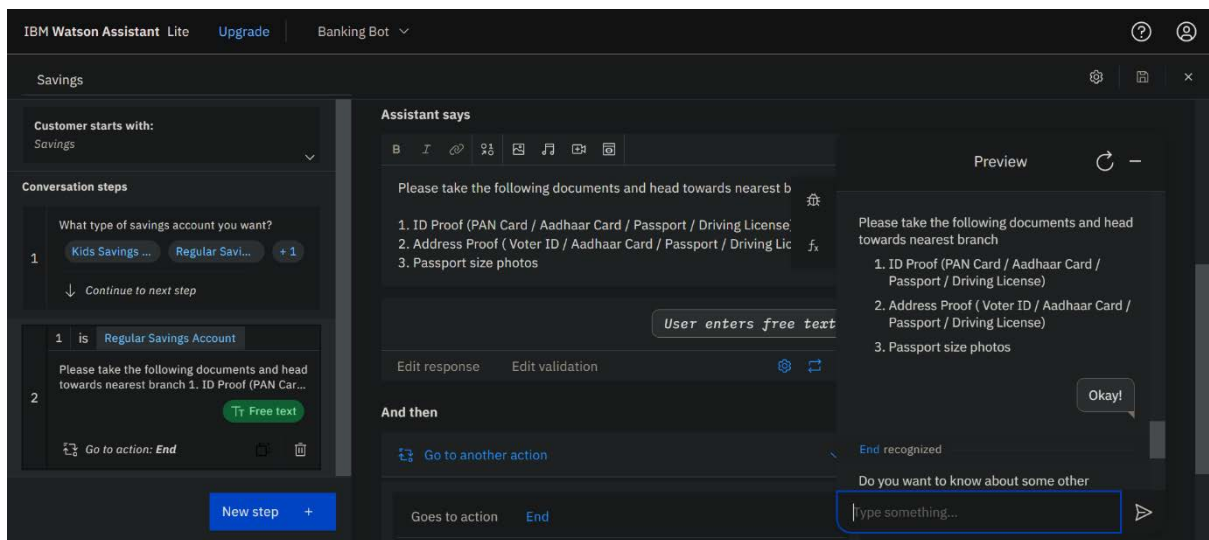
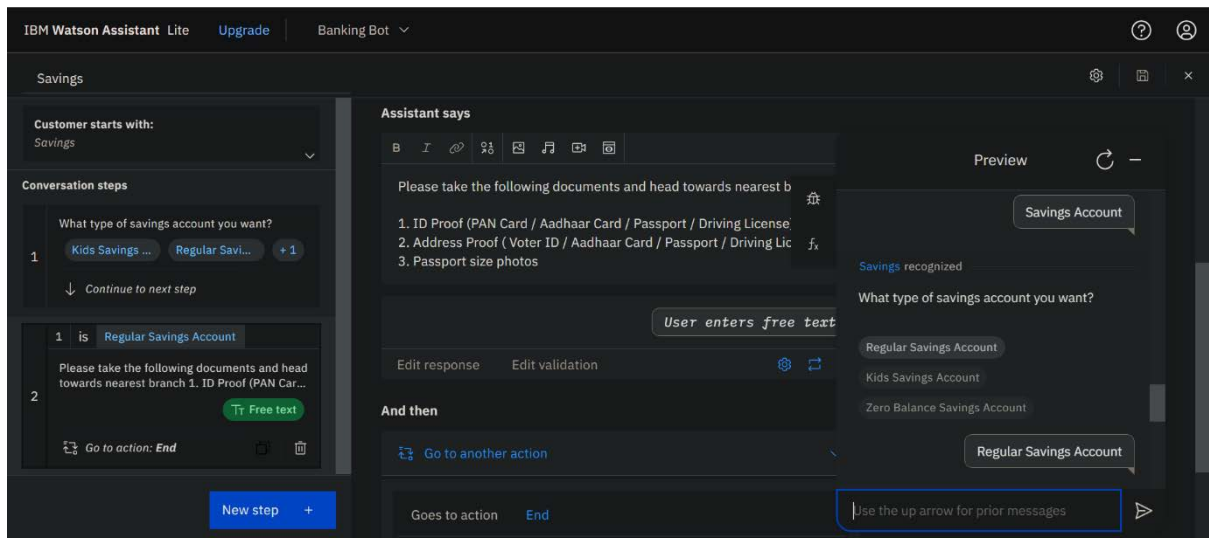


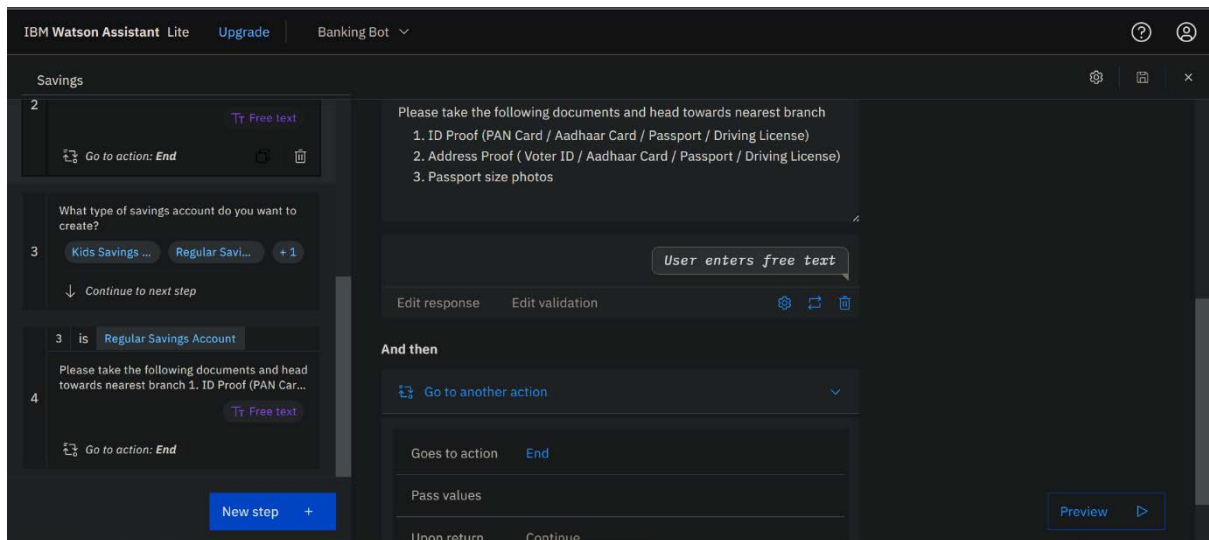




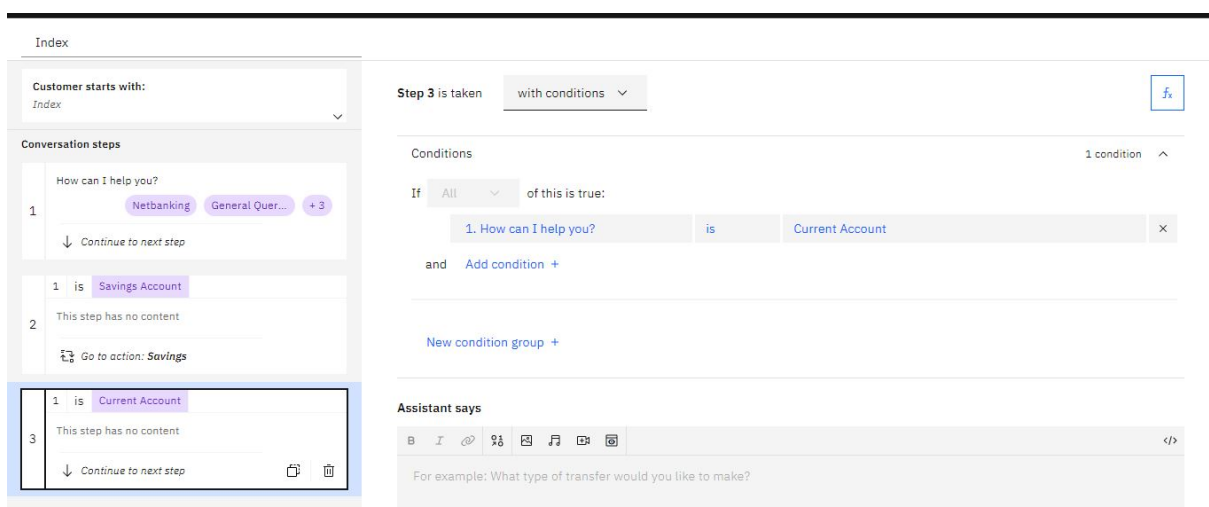
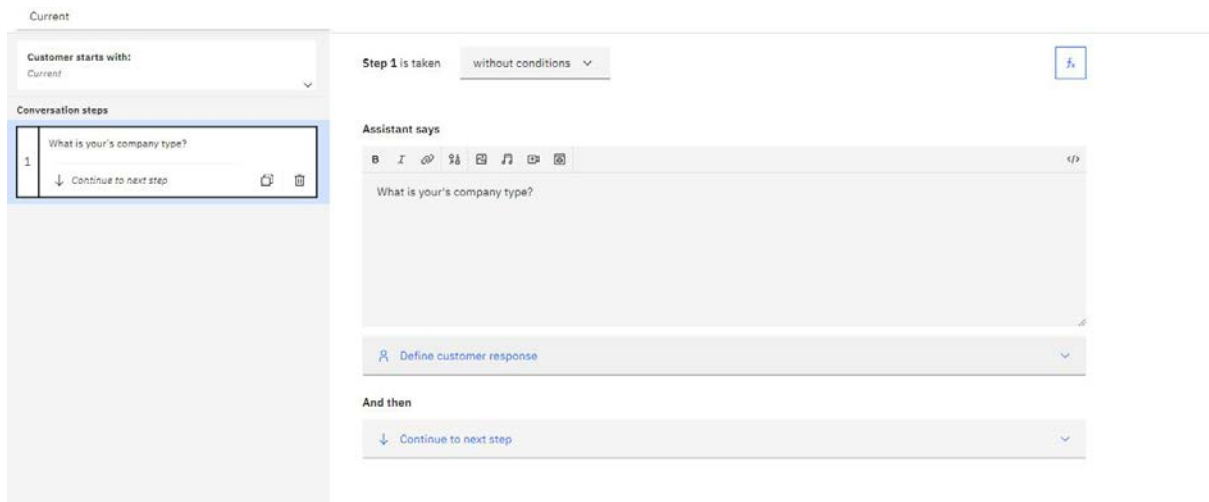
Creating Savings Account Action:







Creating Current Account Action:



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:
 1. Income tax returns of...

Continue to next step

Step 2 is taken

with conditions

fx

Conditions

1 condition

If All of this is true:

1. What is your's company type? is Proprietorship

and Add condition +

New condition group +

Assistant says

Please take the following documents and approach the closest branch:

1. Income tax returns of proprietor for last 3 years

2. Company Agreement

3. Pan card

Current

Customer starts with:
Current

Conversation steps

1

What is your's company type?

Proprietorship

Partnership

Continue to next step

1 is Proprietorship

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

Free text

Go to action: End

1 is Partnership

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

Continue to next step

Step 3 is taken

with conditions

fx

Conditions

1 condition

If All of this is true:

1. What is your's company type? is Partnership

and Add condition +

New condition group +

Assistant says

Please take the following documents and approach the closest branch:

1. Income tax returns of proprietor for last 3 years

2. Company Agreement

3. Pan card for both partners

1 is Proprietorship

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

Free text

Continue to next step

New condition group +

Assistant says

Please take the following documents and approach the closest branch:

1. Income tax returns of proprietor for last 3 years

2. Company Agreement

3. Pan card

User enters free text

