

Project Development Phase

AI-based discourse for Banking Industry

TEAM ID: PNT2022TMID32077

TEAM MEMBERS

ROLE	TEAM MEMBERS NAME	ROLL NO
TEAM LEADER	JAMES SALOMAN J	(731619205018)
TEAM MEMBER 1	KEERDHANA K	(731619205025)
TEAM MEMBER 2	PRATHAB J	(731619205037)
TEAM MEMBER 3	SWATHI K	(731619205054)

Project Development - Delivery Of Sprint-3

Sprint	Functional Requirement (Epic)	User Story Number	Task	Story Points	Priority	Team Members
Sprint-3	Chatbot Skills	USN- 6	Creating General Query Action	10	High	KEERDHANA K
Sprint-3	Chatbot Skills	USN- 7	Creating Net Banking Action	10	High	SWATHI K

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-3	20	6 Days	10 Nov 2022	14 Nov 2022	20	12 Nov 2022

Hardware / Software requirements

Hardware:

Processor: Intel Pentium

Ram: 512 MB

Storage: 256 MB

Software:

IBM Watson Assistant, Browser

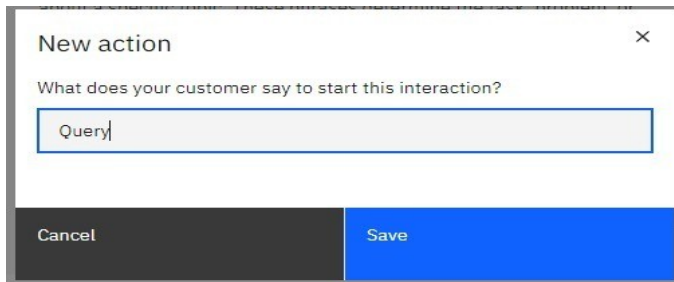
CREATING GENERAL QUERY ACTION

Task assigned: Dwaraga. R.V.

Task started on: 07 - 11 - 2022

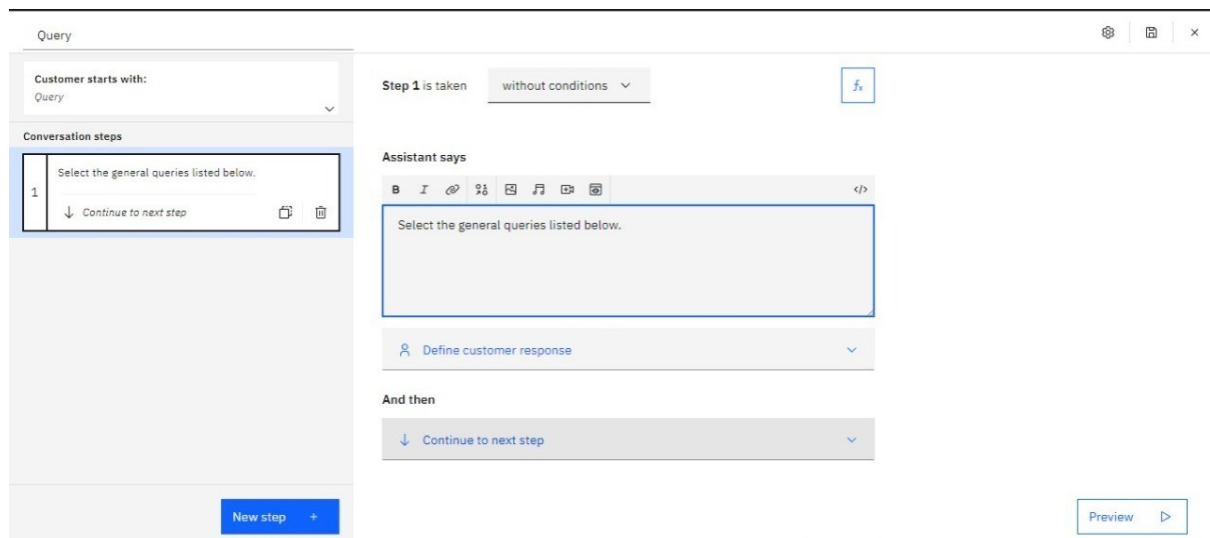
Task completion date: 08 - 11 - 2022

Progress 1: Created a new action for the general query.

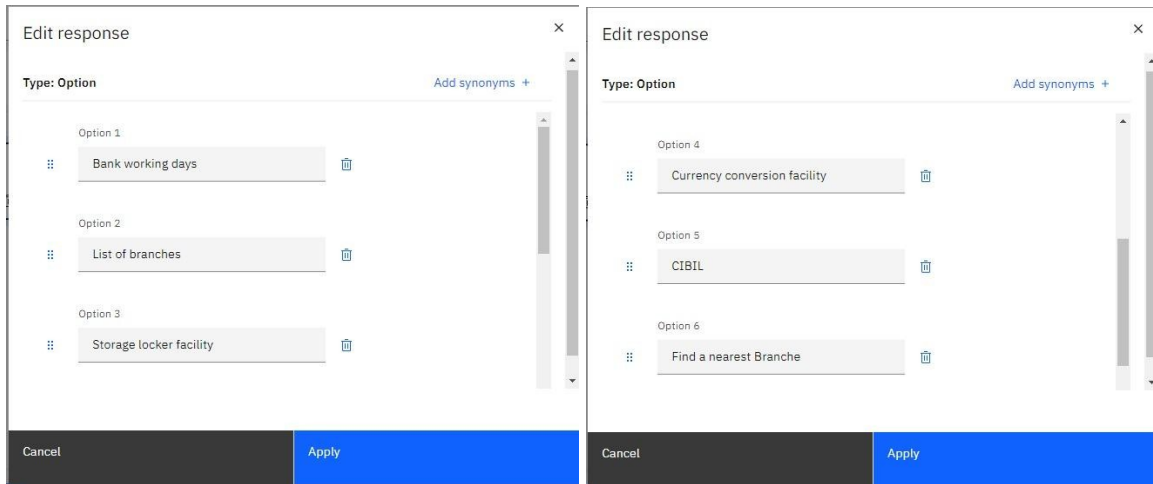


A screenshot of a 'New action' dialog box. The title bar says 'New action' with a close button. The main text asks 'What does your customer say to start this interaction?'. Below this is a text input field containing the word 'Query'. At the bottom, there are two buttons: 'Cancel' on the left and 'Save' on the right.

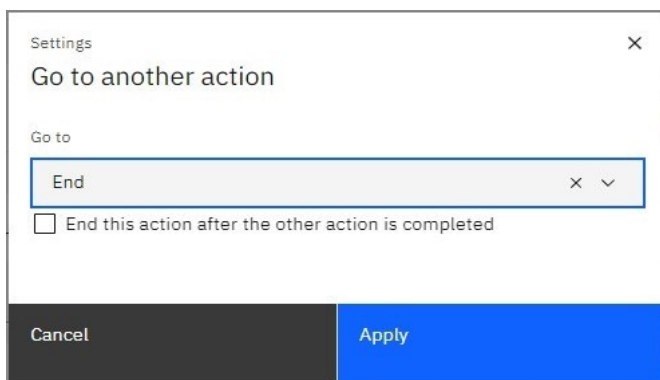
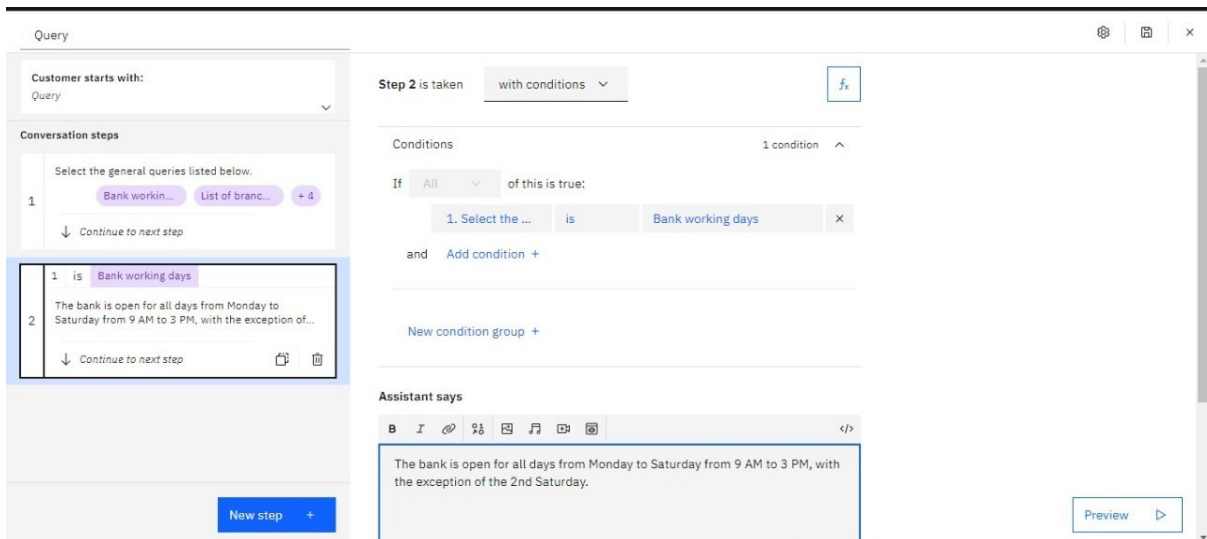
Progress 2: Creating the chatbot's response to the general query message, adding available options for the savings account action, and finally linking the end action.



A screenshot of a chatbot configuration interface. The top bar shows 'Query' and some icons. The main area is divided into two columns. The left column, titled 'Conversation steps', shows a list of steps. Step 1 is selected and contains the text 'Select the general queries listed below.' with a 'Continue to next step' button. The right column, titled 'Assistant says', shows a text input field with the same text 'Select the general queries listed below.' Below this is a dropdown menu labeled 'Define customer response'. At the bottom of the right column, there is an 'And then' section with a 'Continue to next step' button. A 'Preview' button is located at the bottom right of the interface.



Progress 3: The “Bank working days” response is added. The end action is successfully linked.



Progress 4: The “List of branches” response is added. The end action is successfully linked.

[illegible]

Assistant says

Alwarthirunagar, Ambattur, Ariyalur, Arkonam, Arni, Bargur, Chennai, Chidambaram, Chingelpet, Chingelput, Chingleput, Chittoor, Coimbarore, Coimbatore, Coimbotore, Coimbtore, Coonoor, Cuddalore, Dharapuram, Dharmapuri, Dindigul, Erode, Erumaipatti, Gobichettipalayam, Hosur, Kalayarkoil, Kancheepuram, Kancheepuran, Kanchipuram, Kangeyam, Kanniakumari, Kanniyakumari, Kanya Kumari, Kanyakumari, Karaikudi, Karur, Khammam, Khandukur, Kilvelur, Kolathur, Koradacheri, Kottayam, Kovilpatti, Kovilpatti Town, Krishangiri, Krishnagiri, Kumbakonam, Madukkarai, Madurai, Madurai Dist, Manamelnkudi, Mannargudi, Mayiladuthurai, Muthur, Nachiarkovil, Nagapattinam, Nagercoil, Namakkal, Nazareth, Neyveli, Nilgiri, Nilgiris, Omoore, Ottapidaram, Palani, Pallipalayam, Paruthipattu, Pattukottai, Perambalur, Perungudi, Pettavaithalai, Pollachi, Pondicherry, Puddukkottai, Pudukkottai, Pudukottai, Purnea, Ramanathapuram, Ramanathapuram, Ranipet, Rbo Nagercoil, Saivaganga, Salem, Samayanallur, Selam, Sembanarkoil, Sivaganga, Sivagangai, Sooranam, Tambaram, Tenkasi, Thanjavur, Then, Theni, Thirupattur, Thiruvallur, Thiruvannamalai, Thiruvarur, Thiyaadurgam, Thoothukudi, Thoothukudi, Thissur, Tiruchirappalli, Tiruchirappalli, Tiruchirappally, Tiruchirappalli, Tirunelveli, Tirunelveli, Tirunelveli, Tirunelvely, Tirupattur, Tiruppur, Tiruppur, Tirupur, Tirutani, Tiruvallur, Tiruvannamalai, Tiruvarur, Thoothukudi, Trichy, Triunelveli, Tuthukhodi, Tuticorin, Udhagamandalam, Udhagamandalam, Udumalpet, Valangaiman, Vellore, Vengamedu, Villupuram, Virudhnagar, Virudhunagar and Virudunagar.

Settings

×

Go to another action

Go to

End

×

▼

☐ End this action after the other action is completed

Cancel

Apply

Progress 5: The “Storage locker facility” response is added. The end action is successfully linked.

Query

1 is Bank working days

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

2

Free text

Go to action: End

1 is List of branches

Alwarthirunagar, Ambattur, Ariyalur, Arkonam, Arni, Bargur, Chennai, Chidambaram, Chingelpet,...

3

Free text

Go to action: End

1 is Storage locker facility

Alwarthirunagar, Ambattur, Ariyalur, Arkonam, Arni, Bargur, Chennai, Chidambaram, Chingelpet,...

4

Free text

Continue to next step

New step +

Step 4 is taken with conditions

Conditions1 condition

IfAll of this is true:

1. Select the ... is Storage locker facility

andAdd condition +

New condition group +

Assistant says

Alwarthirunagar, Ambattur, Ariyalur, Arkonam, Arni, Bargur, Chennai, Chidambaram, Chingelpet, Chingelpet, Chingleput, Chittoor, Coimbarore, Coimbatore, Coimbatore, Coimbatore, Coonoor, Cuddalore, Dharapuram, Dharmapuri, Dindigul, Erode, Erumaipatti, Gobichettipalayam, Hosur, Kalayarkoil, Kancheepuram these branches have a storage locker facility.

Preview

Settings

Go to another action

Go to

End

End this action after the other action is completed

Cancel

Apply

Progress 6: The “Currency conversion facility” response is added. The end action is successfully linked.

Query

1 is List of branches

Alwarthirunagar, Ambattur, Ariyalur, Arkonam, Arni, Bargur, Chennai, Chidambaram, Chingelpet,...

3

Free text

Go to action: End

1 is Storage locker facility

Alwarthirunagar, Ambattur, Ariyalur, Arkonam, Arni, Bargur, Chennai, Chidambaram, Chingelpet,...

4

Free text

Go to action: End

1 is Currency conversion facility

All our bank branches have forex exchange facility.

5

Free text

Continue to next step

New step +

Step 5 is taken with conditions

Conditions1 condition

IfAll of this is true:

1. Select the ... is Currency conversion facility

andAdd condition +

New condition group +

Assistant says

All our bank branches have forex exchange facility.

Preview

Settings

×

Go to another action

Go to

End

×

▼

☐ End this action after the other action is completed

Cancel

Apply

Progress 7: The “CIBIL” response is added. The end action is successfully linked.

Query

1 is Storage locker facility

Alwarthirunagar, Ambattur, Ariyalur, Arkonam, Arni, Bargur, Chennai, Chidambaram, Chingelpet,...

4

Free text

Go to action: End

1 is Currency conversion facility

All our bank branches have forex exchange facility.

5

Free text

Go to action: End

1 is CIBIL

Banks, as a part of their diligence process, gauge the creditworthiness of individuals based on cre...

6

Continue to next step

New step +

Step 6 is taken with conditions ▼

fx

Conditions 1 condition ▲

If All ▼ of this is true:

1. Select the ... is CIBIL

and Add condition +

New condition group +

Assistant says

B I ↻ ↗ ↘ ↙ ↚ ↛ ↜ ↝ ↞ ↠ ↡ ↢ ↣ ↤ ↥ ↦ ↧ ↨ ↩ ↪ ↫ ↬ ↭ ↮ ↯ ↰ ↱ ↲ ↳ ↴ ↵ ↶ ↷ ↸ ↹ ↺ ↻ ↼ ↽ ↾ ↿ ↺ ↻ ↼ ↽ ↾ ↿

</>

Banks, as a part of their diligence process, gauge the creditworthiness of individuals based on credit scores. The information listed on your credit report includes several variables that CIBIL uses to set your credit score. The CIBIL score, therefore, reflects the extent of the probability of the default. An individual's credit score is submitted to CIBIL by banks and financial institutions on a monthly basis.

Preview ▶

Settings

×

Go to another action

Go to

End

×

▼

☐ End this action after the other action is completed

Cancel

Apply

Progress 8: The “Find a nearest Branch” response is added. The end action is successfully linked.

The screenshot displays the Power Automate interface. On the left, a 'Query' pane shows a list of steps. Step 7 is highlighted, showing a 'Find a nearest Branche' action. The right pane shows the configuration for Step 7. It includes a 'Step 7 is taken' section with a dropdown set to 'with conditions'. Below this, the 'Conditions' section shows a single condition: 'If 1. Select the ... is Find a nearest Branche'. The 'Assistant says' section shows the response: 'Kindly reach out to our customer care executive. Contact us at 9876543210.' A 'Preview' button is visible at the bottom right.

The screenshot shows a 'Settings' dialog box for the 'Go to another action' step. The 'Go to' dropdown is set to 'End'. The checkbox 'End this action after the other action is completed' is unchecked. The 'Apply' button is highlighted in blue.

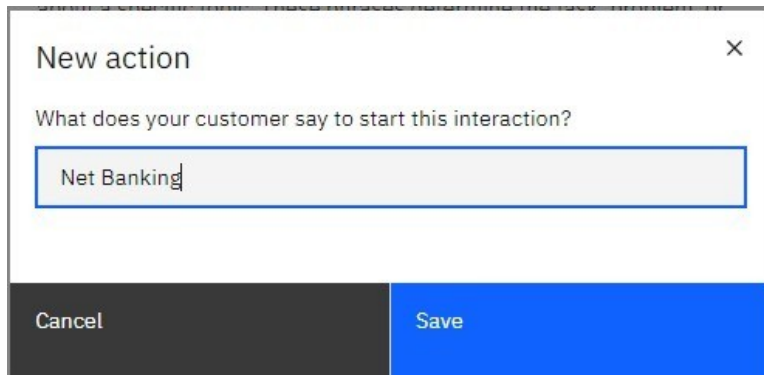
CREATING NET BANKING ACTION

Task assigned: Dhivya .S.

Task started on: 07 - 11 - 2022

Task completion date: 08 - 11 - 2022

Progress 1: Created a new action for net banking.



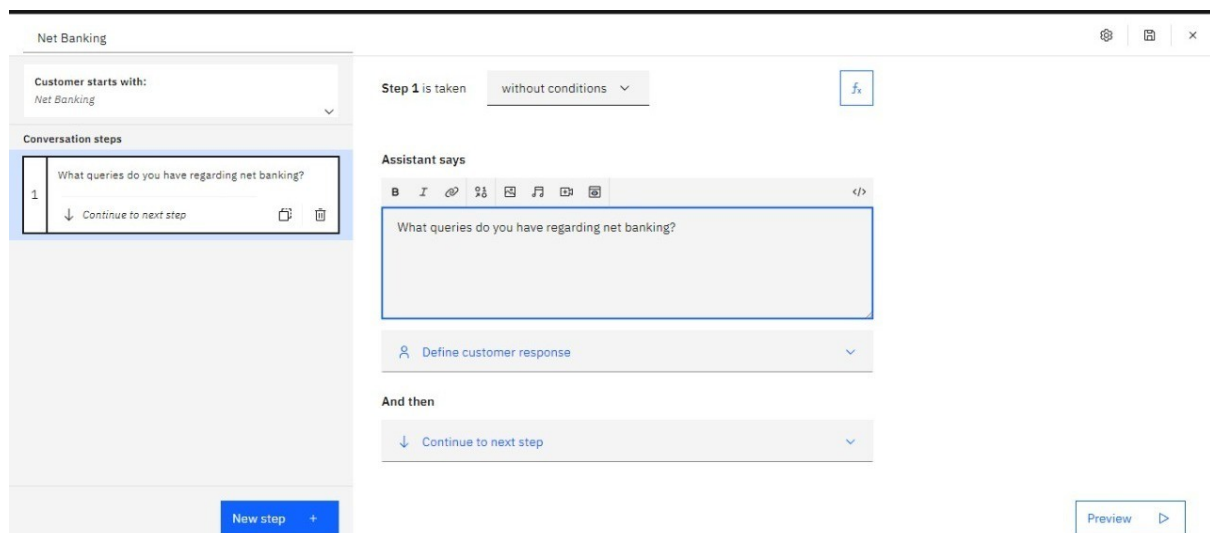
New action

What does your customer say to start this interaction?

Net Banking

Cancel Save

Progress 2: Creating the chatbot's response to the general query message, adding available options for the net banking action, and finally linking the end action.



Net Banking

Customer starts with:
Net Banking

Conversation steps

1 What queries do you have regarding net banking?
Continue to next step

Step 1 is taken without conditions

Assistant says

What queries do you have regarding net banking?

Define customer response

And then
Continue to next step

New step +

Preview

Progress 4: The “How do I register for Net Banking?” response is added. The end action is successfully linked.

The screenshot shows the configuration interface for a chatbot named "Net Banking". On the left, a "Conversation steps" panel lists three steps. Step 3 is highlighted and shows the question "How do I register for Net Banking?" and the response "Please download and fill out the bank requisition form and submit it to your home branch." with a "Go to action: End" link. On the right, the "Step 3 is taken" configuration panel shows a condition: "If All of this is true: 1. What queri... is How do I register for Net ...". Below this, the "Assistant says" panel displays the response text: "Please download and fill out the bank requisition form and submit it to your home branch." A "Preview" button is visible at the bottom right.

The screenshot shows a "Settings" dialog titled "Go to another action". It has a "Go to" dropdown menu with "End" selected. Below the dropdown, there is a checkbox labeled "End this action after the other action is completed" which is currently unchecked. At the bottom, there are "Cancel" and "Apply" buttons.

Progress 5: The “What are the features of Net Banking?” response is added. The end action is successfully linked.

The screenshot shows the configuration interface for the "Net Banking" chatbot. On the left, the "Conversation steps" panel shows four steps. Step 4 is highlighted and shows the question "What are the features of Net Banking?" and a response with a list of features: "1)Check the account statement online 2)Open a fixed deposit account 3)Pay utility bill such as...". On the right, the "Step 4 is taken" configuration panel shows a condition: "If All of this is true: 1. What queri... is What are the features of N...". Below this, the "Assistant says" panel displays the response text: "1)Check the account statement online 2)Open a fixed deposit account 3)Pay utility bill such as water bills and electricity bills 4)Make merchant payments 5)Transfer funds 6)Order a cheque book 7)Buy general insurance 8)Recharge prepaid mobile/DTH". A "Preview" button is visible at the bottom right.

Settings

×

Go to another action

Go to

End

×

▼

☐ End this action after the other action is completed

Cancel

Apply

Progress 6: The “Facing errors in Net Banking?” response is added. The end action is successfully linked.

Net Banking

✎ ⚙ 📄 ×

1

is

How do I register for Net Banking?

Free text

Go to action: End

3

1

is

Please download and fill out the bank requisition form and submit it to your home branch.

Free text

Go to action: End

4

1

is

What are the features of Net Banking?

Free text

1)Check the account statement online 2)Open a fixed deposit account 3)Pay utility bill such as wat...

Free text

Go to action: End

5

1

is

Facing errors in Net Banking?

Free text

Please contact our customer care executive or approach the closest branch.

Free text

Go to action: End

New step +

Step 5 is taken

with conditions ▼

f

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

Preview ▶

Settings

×

Go to another action

Go to

End

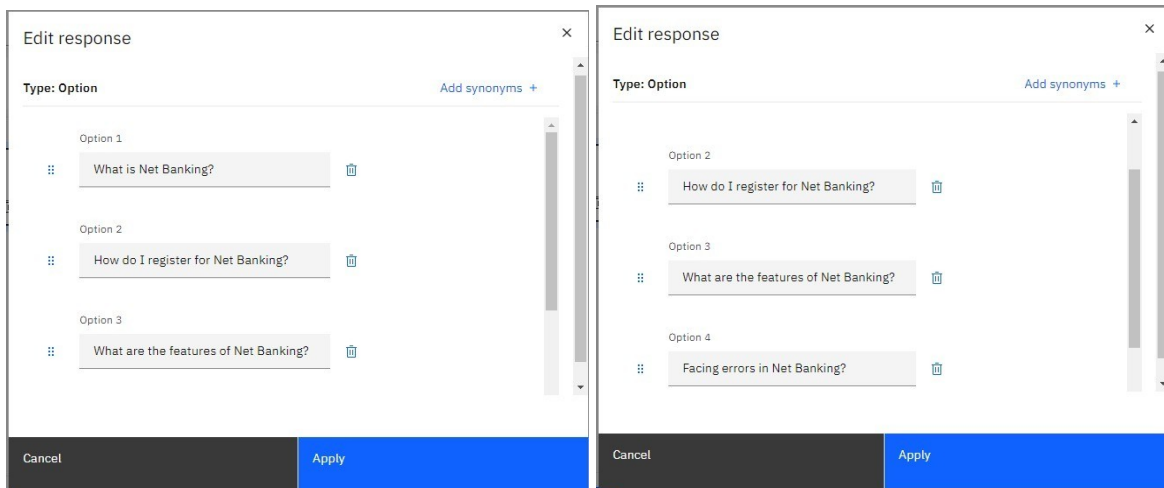
×

▼

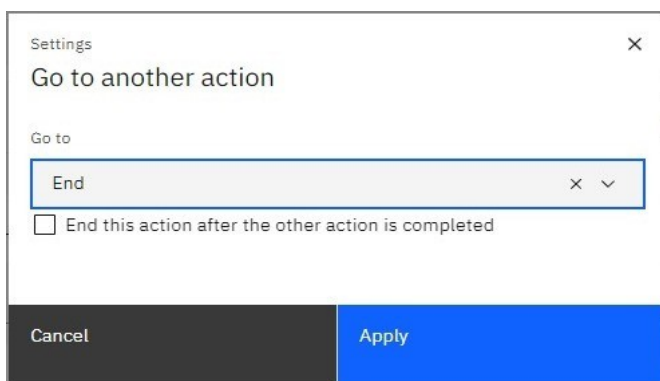
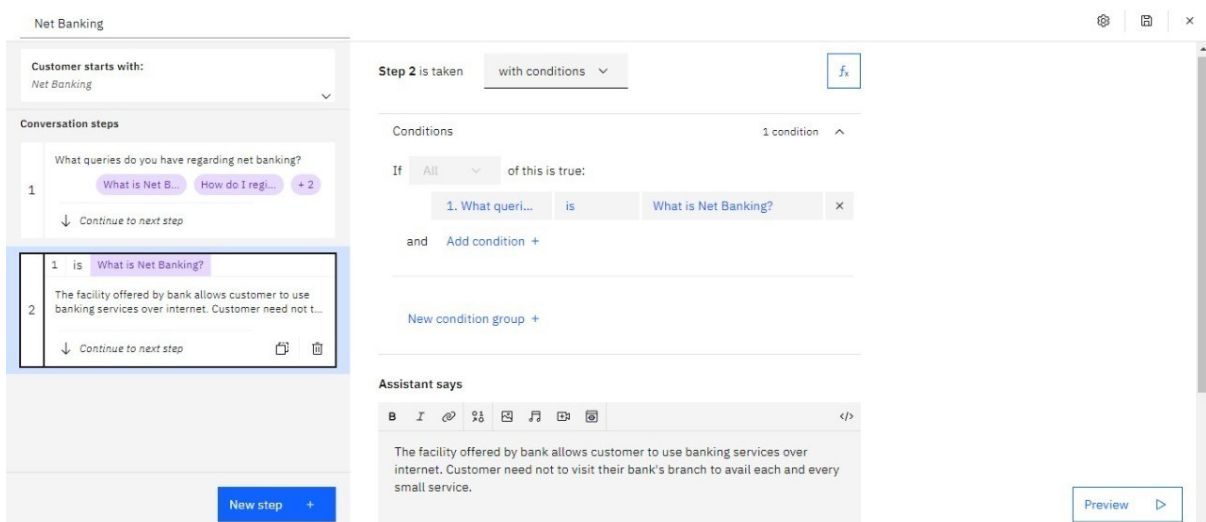
☐ End this action after the other action is completed

Cancel

Apply



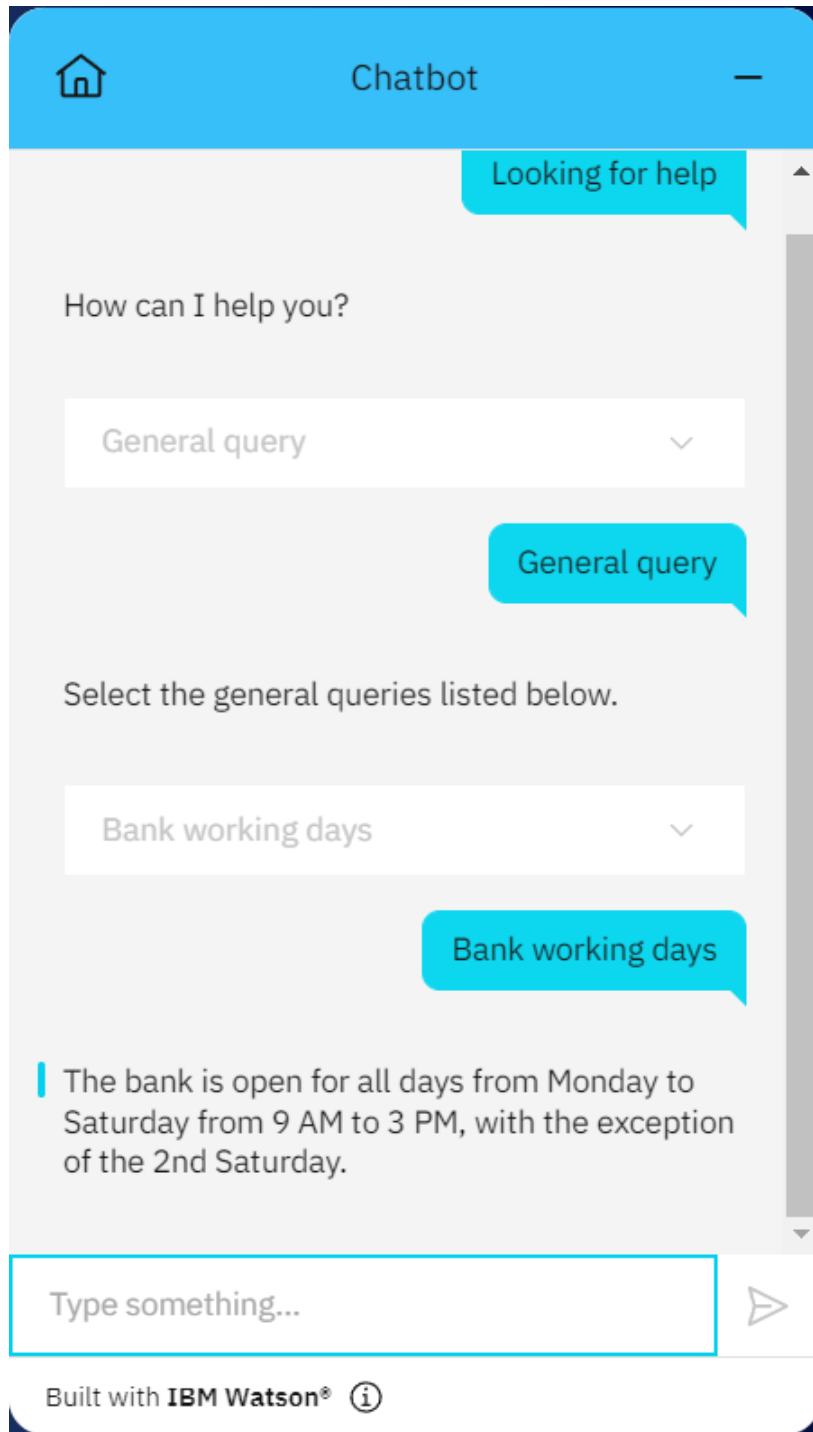
Progress 3: The “What is Net Banking?” response is added. The end action is successfully linked.



Testing the chat

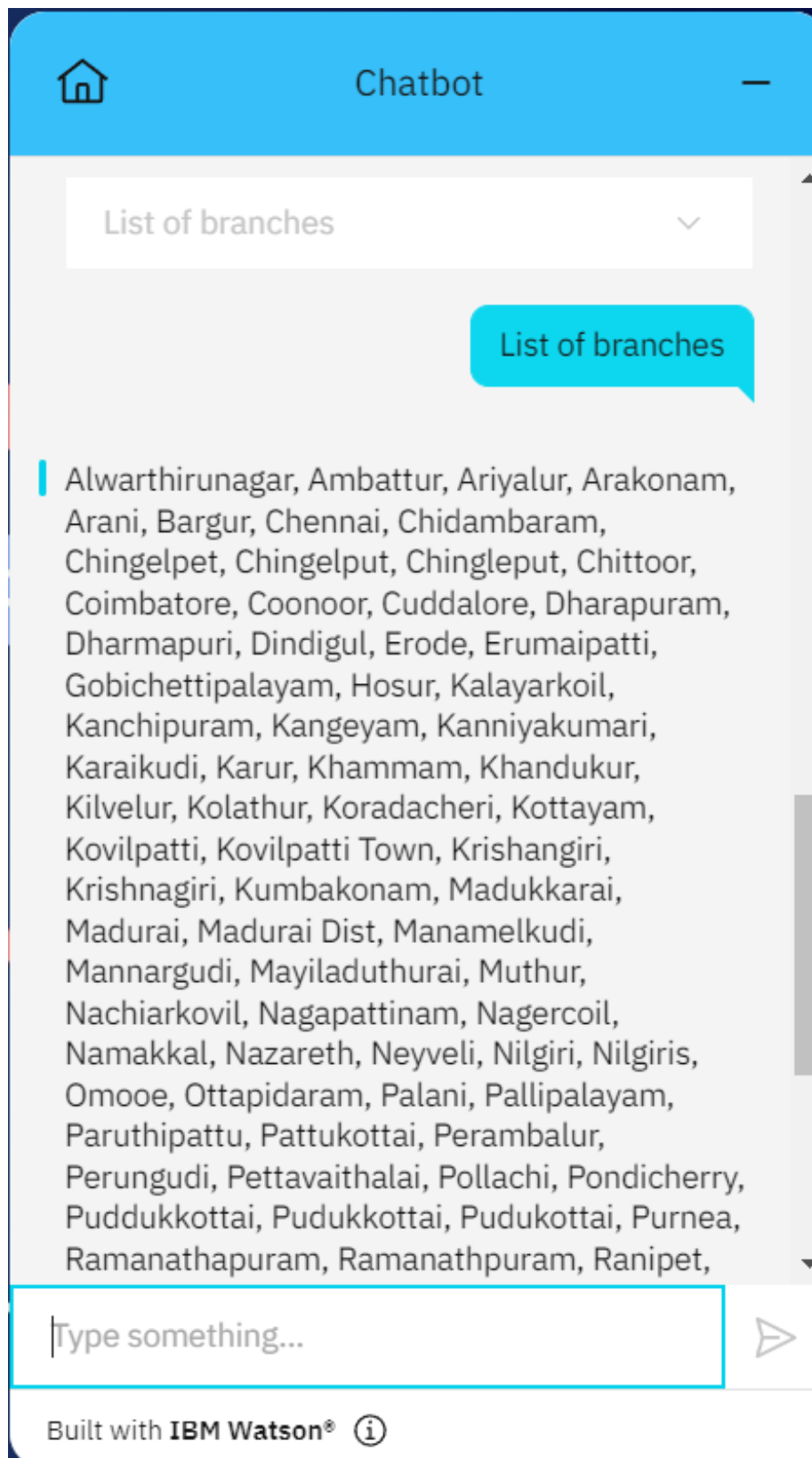
The General Query Actions being tested

Testing 1: Bank working days



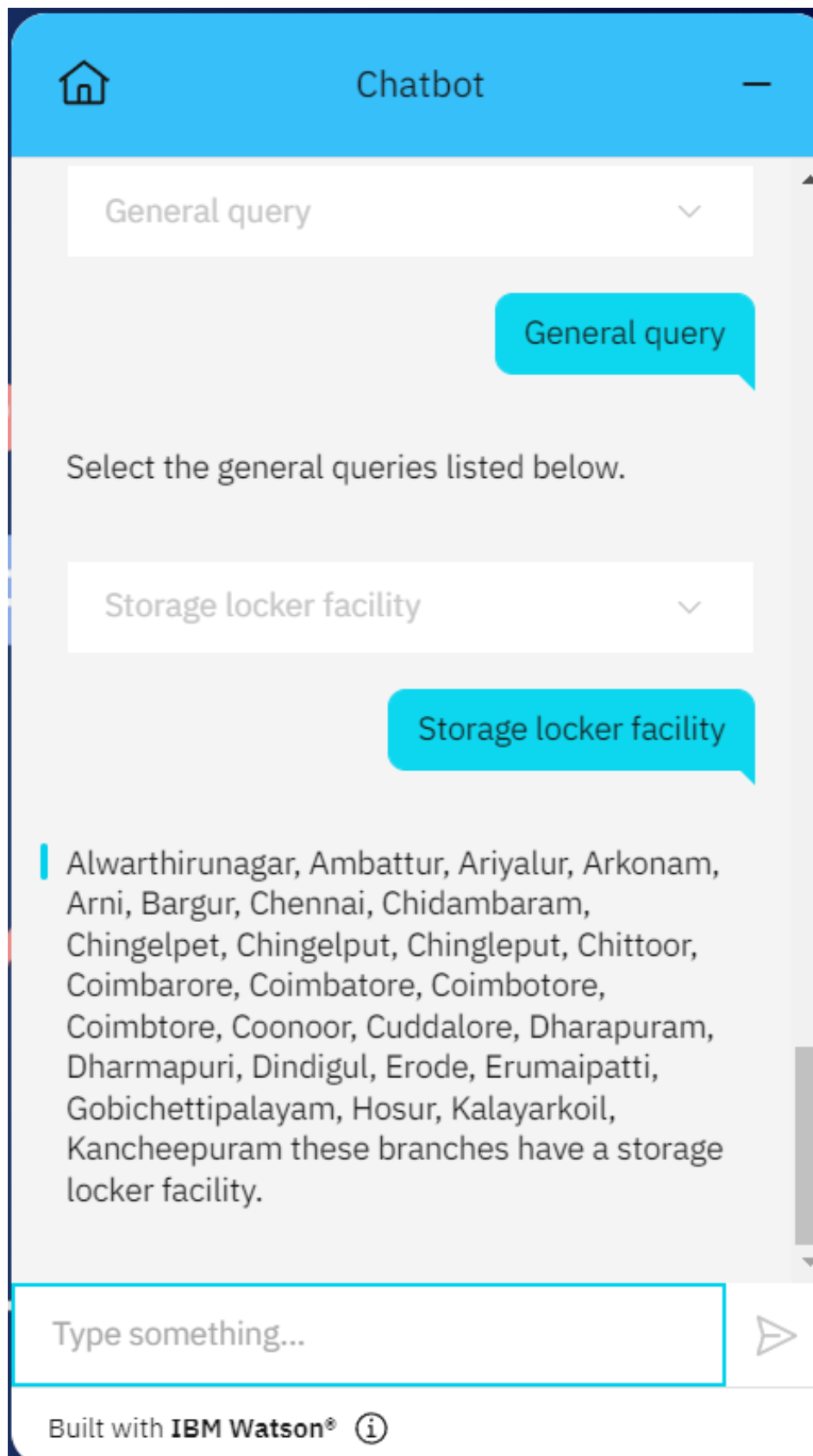
Test result: passed

Testing 2: List of branches



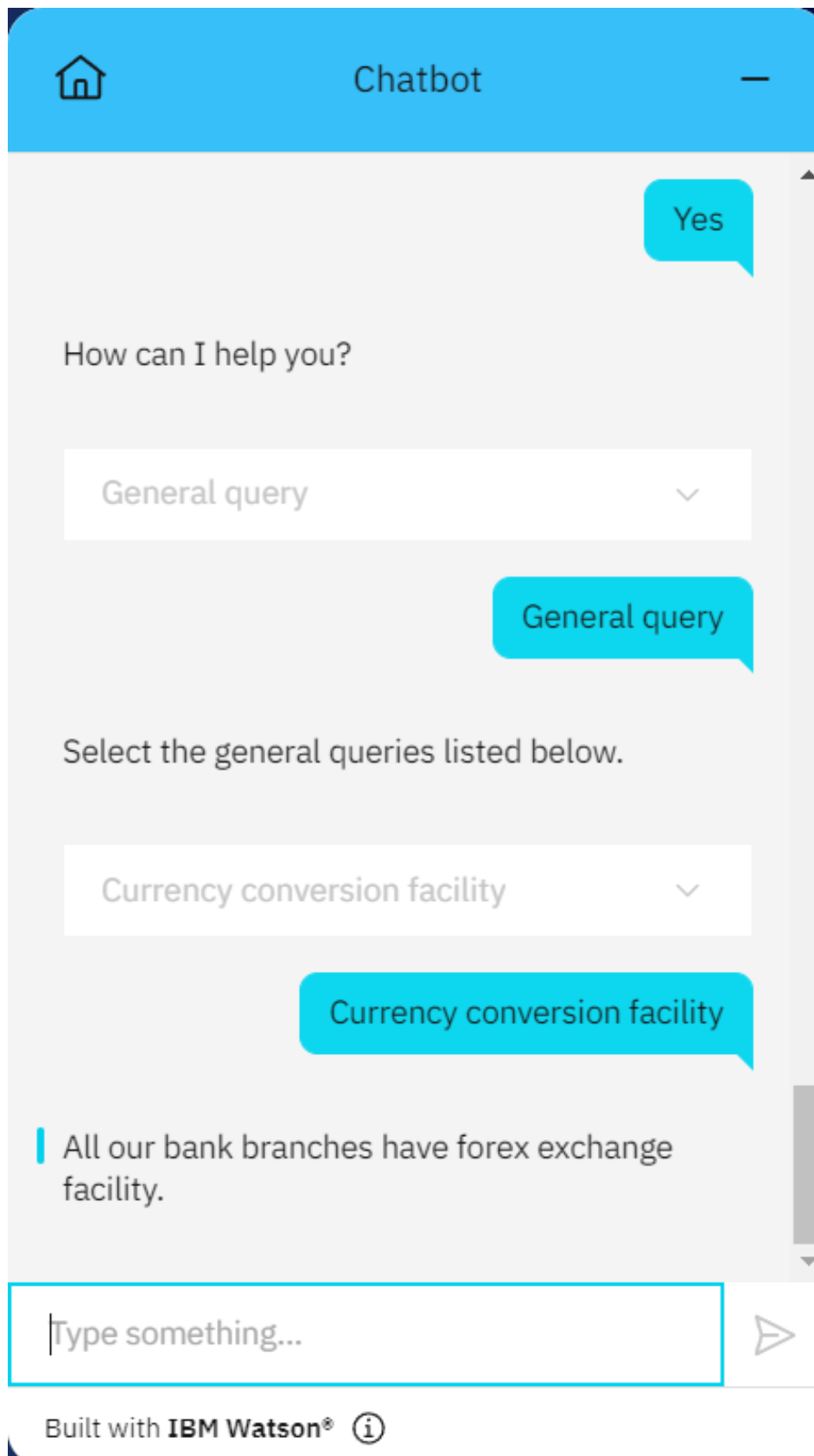
Test result: passed

Testing 3: Storage locker facility



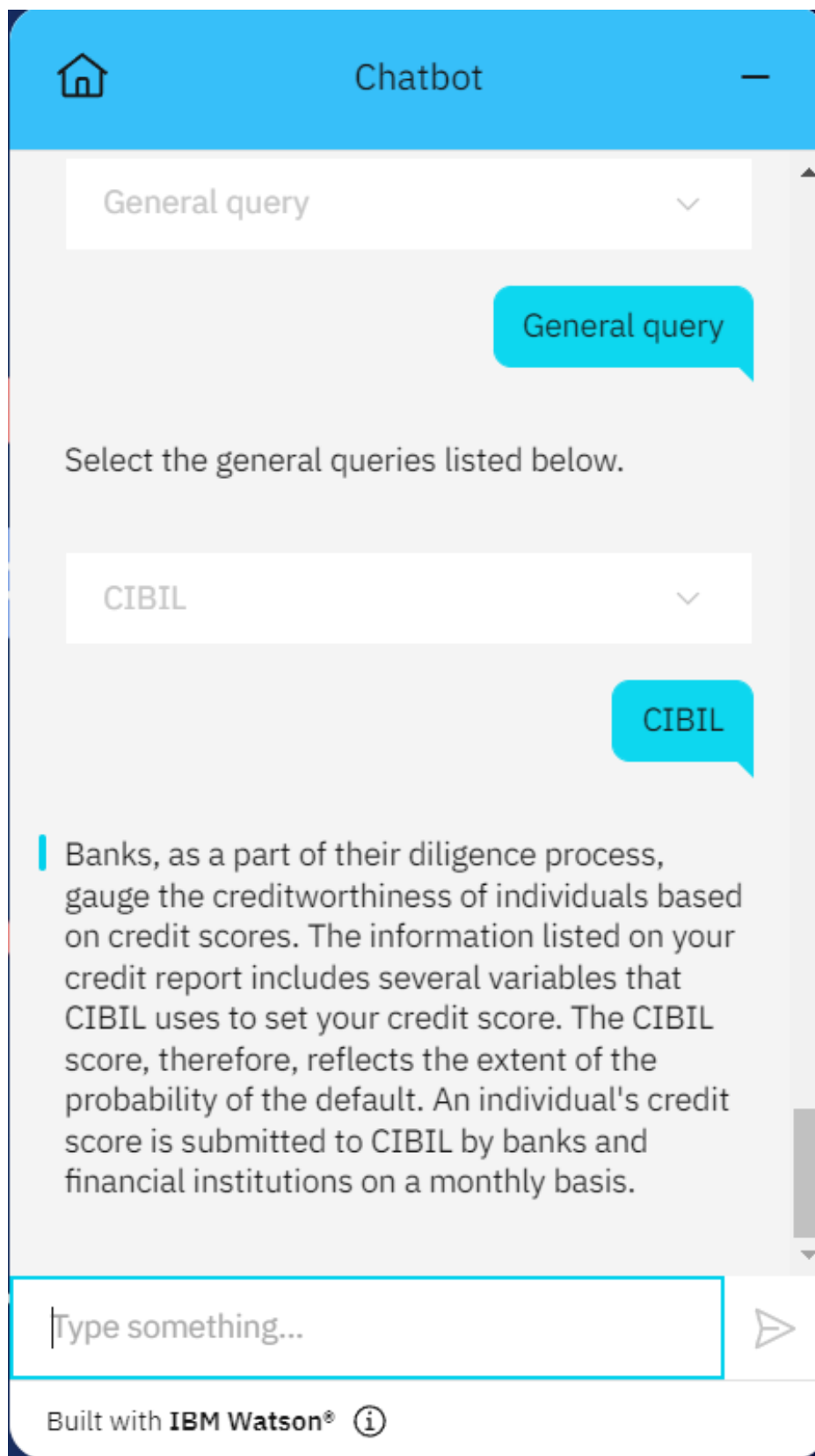
Test result: passed

Testing 4: Currency conversion facility



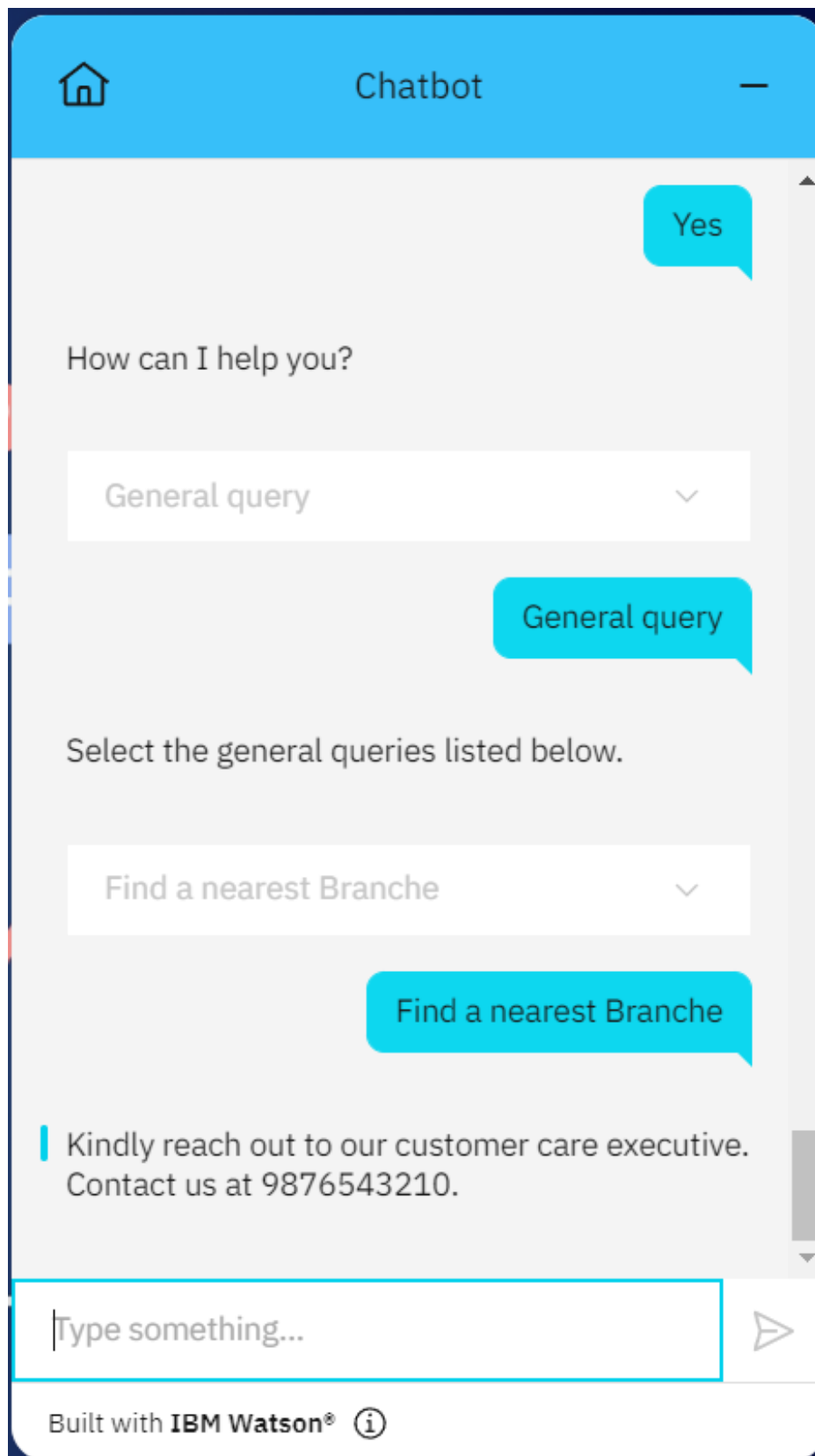
Test result: passed

Testing 5: CIBIL



Test result: passed

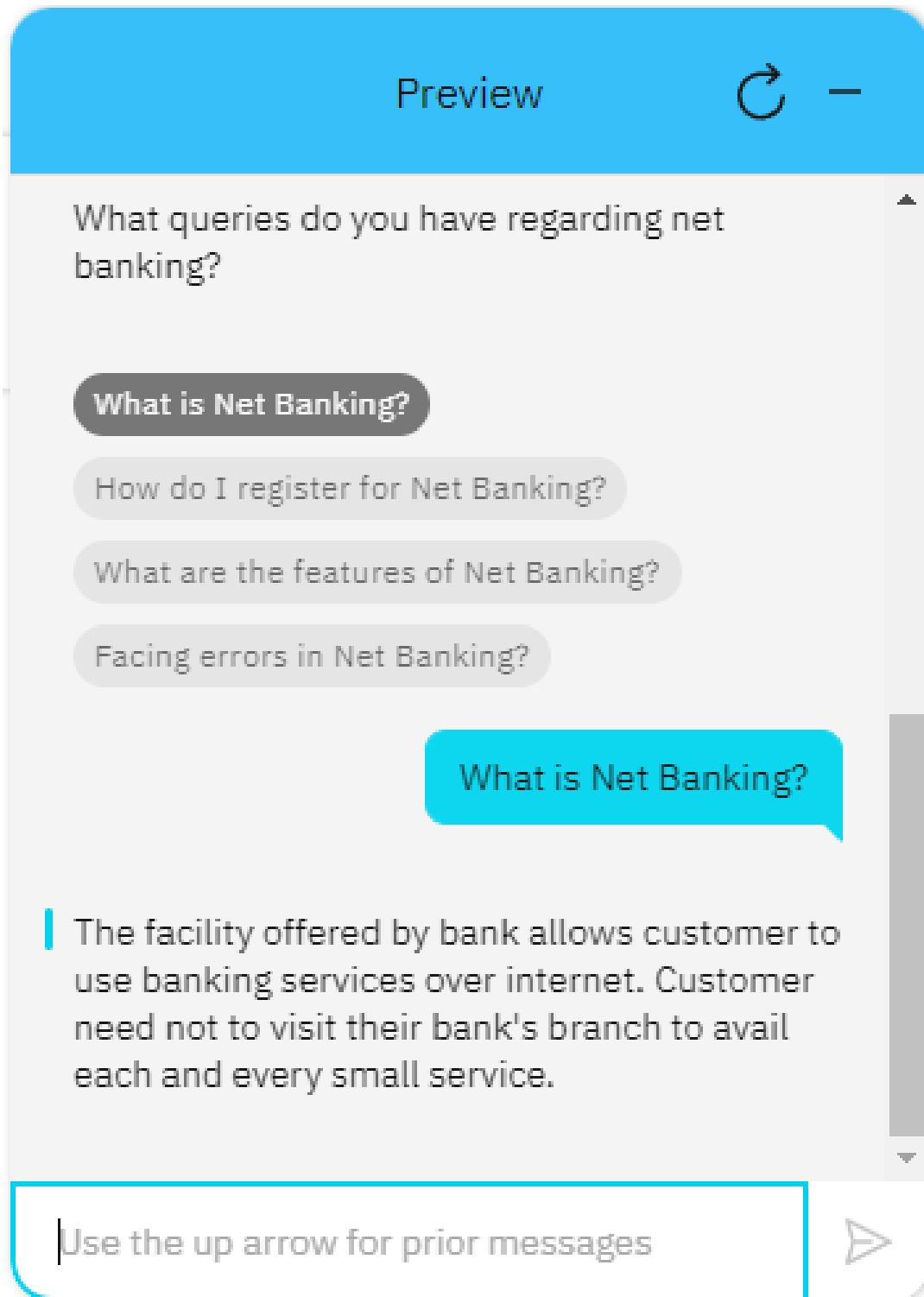
Testing 6: Find a nearest Branch



Test result: passed

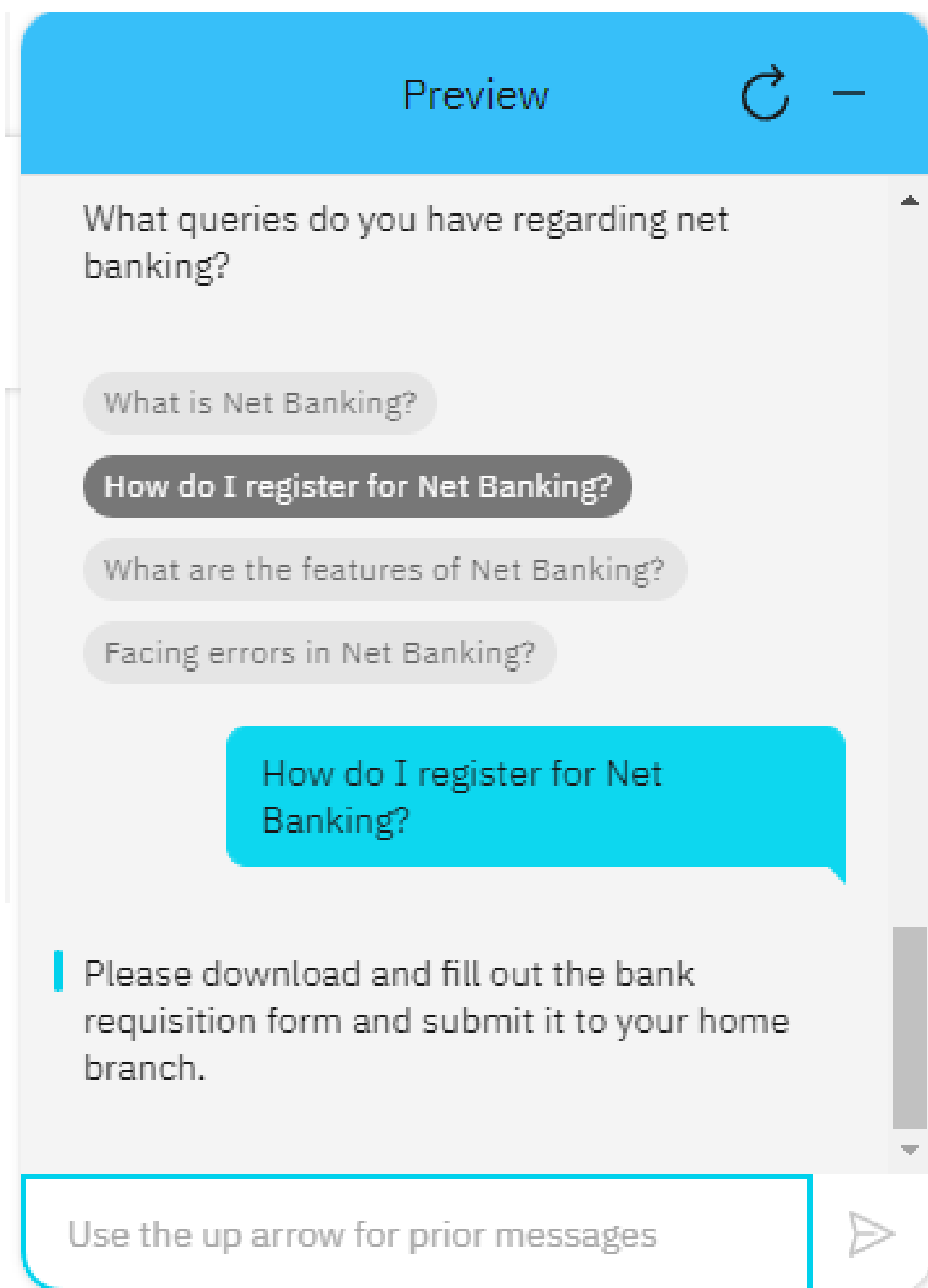
The Netbanking Account Action is being tested

Testing 1: What is Net Banking?



Test result: passed

Testing 2: How do I register for Net Banking?



Test result: passed

Testing 3: What are the features of Net Banking?

Preview

How do I register for Net Banking?

What are the features of Net Banking?

Facing errors in Net Banking?

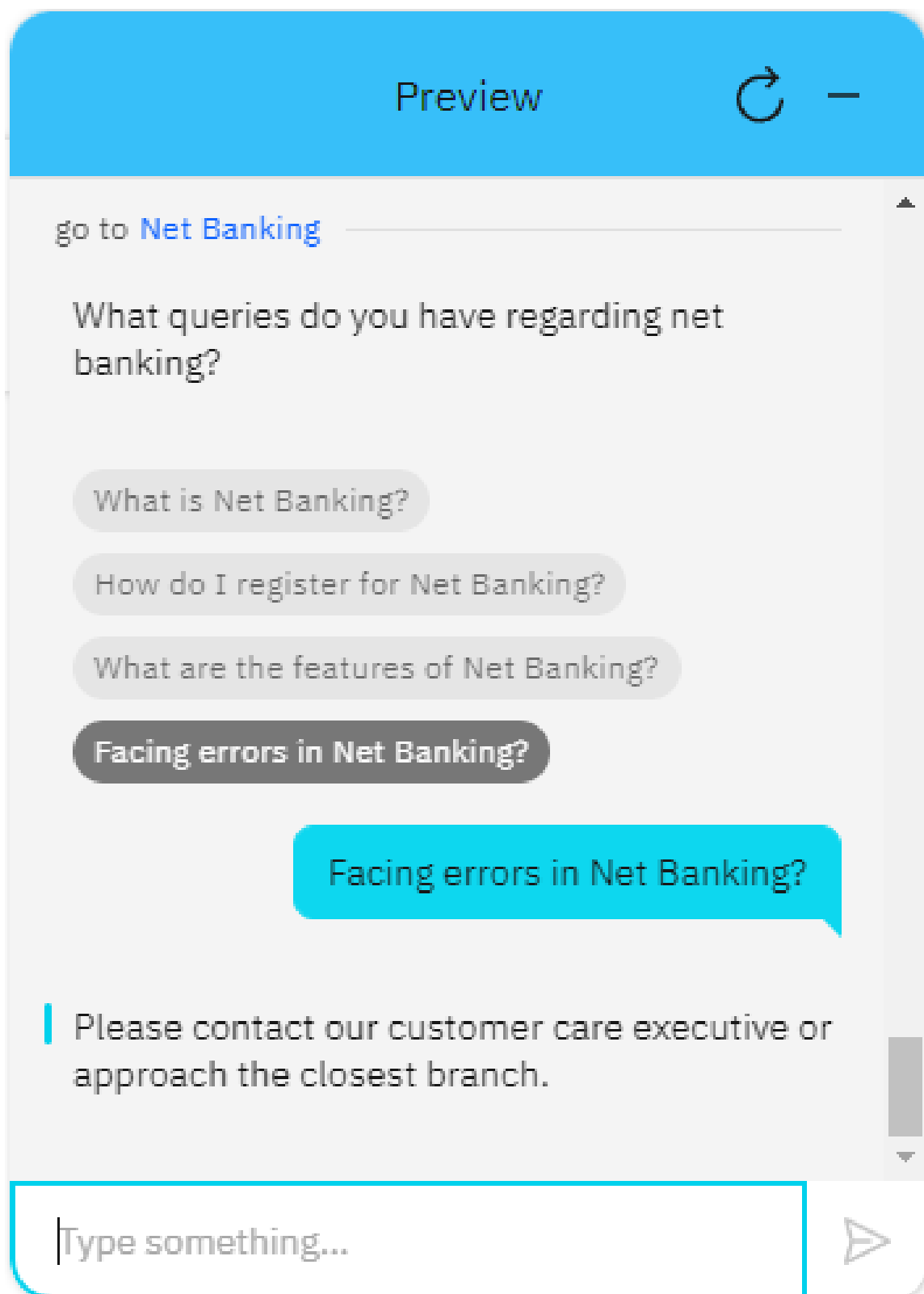
What are the features of Net Banking?

1)Check the account statement online
2)Open a fixed deposit account
3)Pay utility bill such as water bills and electricity bills
4)Make merchant payments
5)Transfer funds
6)Order a cheque book
7)Buy general insurance
8)Recharge prepaid mobile/DTH

Type something...

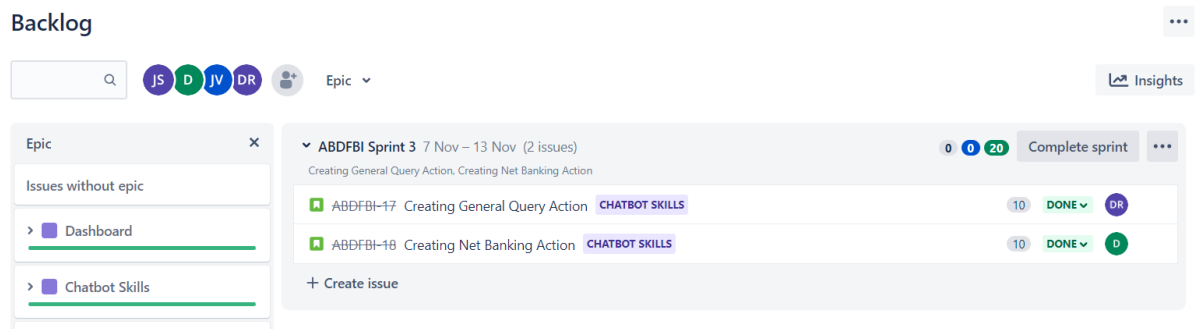
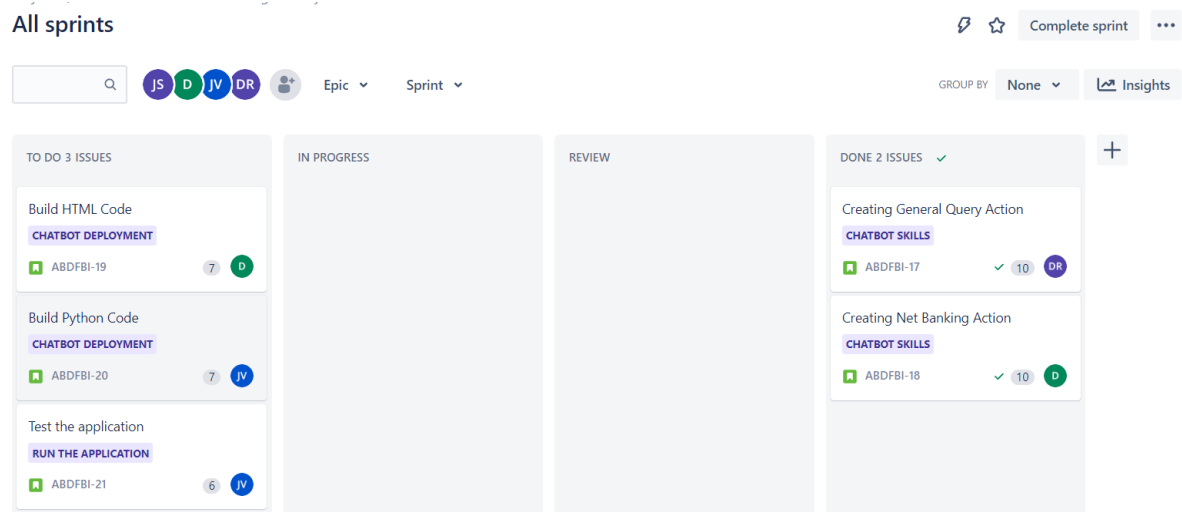
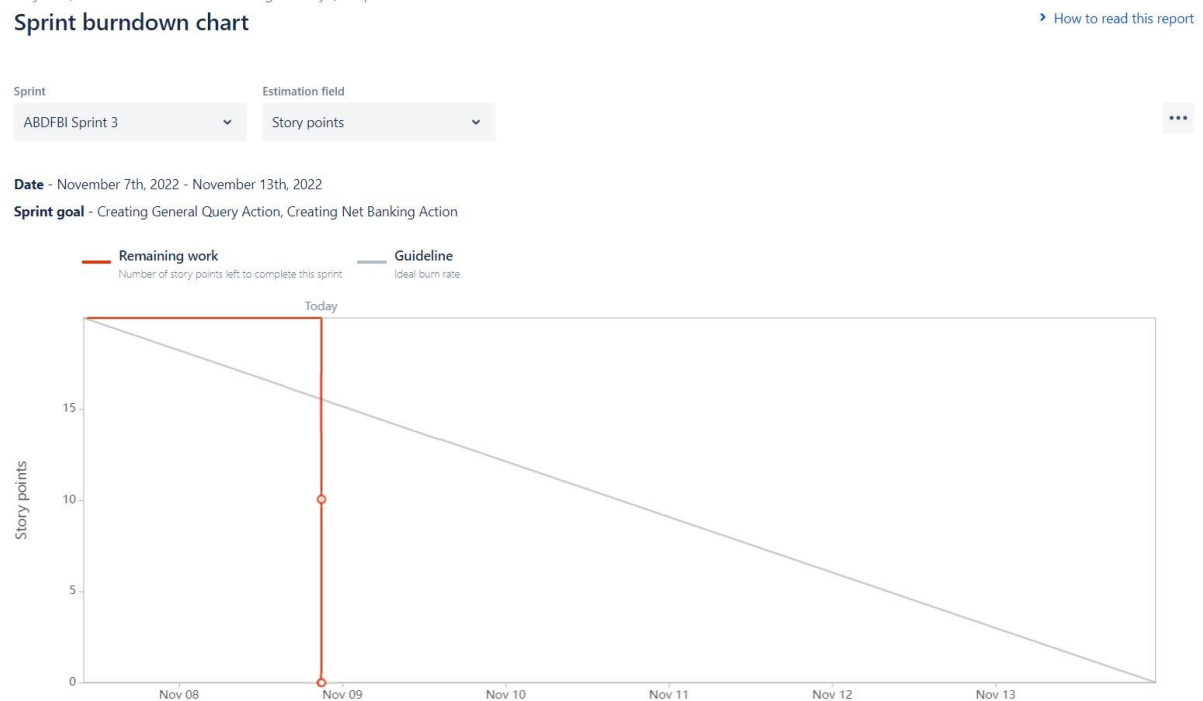
Test result: passed

Testing 4: Facing errors in Net Banking?



Test result: passed

Sprint burndown chart:



Roadmap

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JS

JV

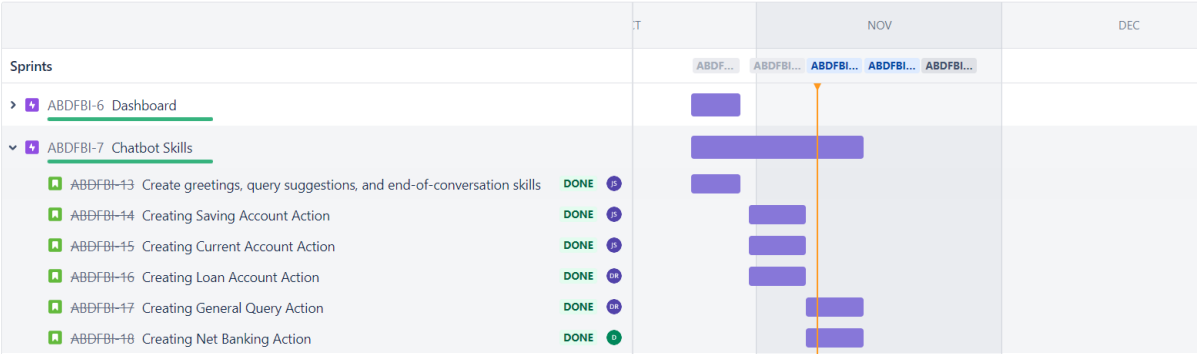
D

DR

Status category ▾

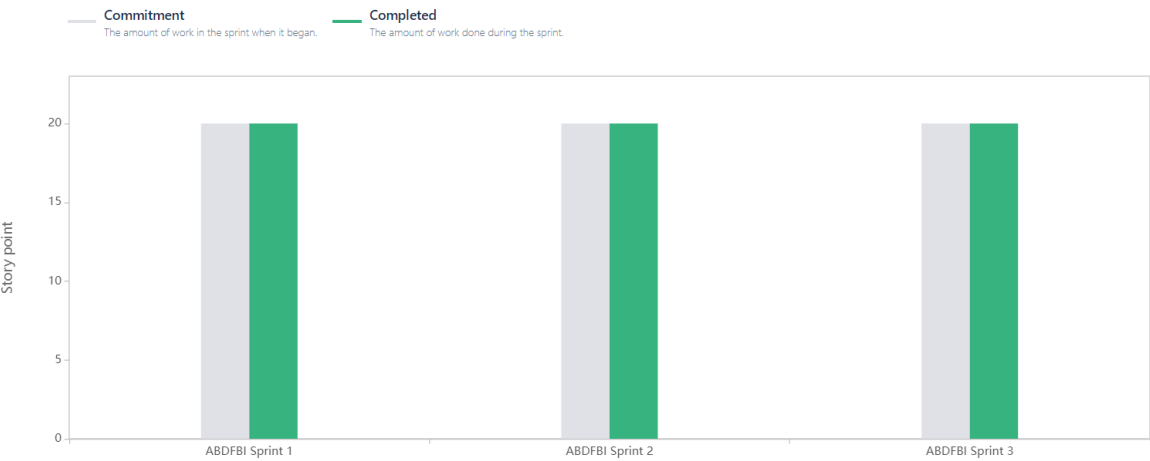
Epic ▾

[View settings](#)



Velocity report

[How to read this report](#)



Sprint	Commitment	Completed
ABDFBI Sprint 1	20	20
ABDFBI Sprint 2	20	20
ABDFBI Sprint 3	20	20