

# Project Development Phase

## AI-based discourse for Banking Industry

TEAM ID: PNT2022TMID32077

### TEAM MEMBERS

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

### Project Development - Delivery of Sprint-2

Sprint	Functional Requirement (Epic)	User Story Number	User Story / Task	Story Points	Priority	Team Members
Sprint-2	Chatbot Skills	USN- 3	Creating Savings Account Action	7	High	JAMES SALOMAN.J
Sprint-2	Chatbot Skills	USN- 4	Creating Current Account Action	7	High	JAMES SALOMAN.J
Sprint-2	Chatbot Skills	USN- 5	Creating Loan Account Action	6	High	KEERDHANA.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-2	20	6 Days	06 NOV 2022	9 NOV 2022	20	9 Nov 2022

# Hardware / Software requirements

## Hardware:

Processor: Intel Pentium

Ram: 512 MB

Storage: 256 MB

## Software:

IBM Watson Assistant, Browser

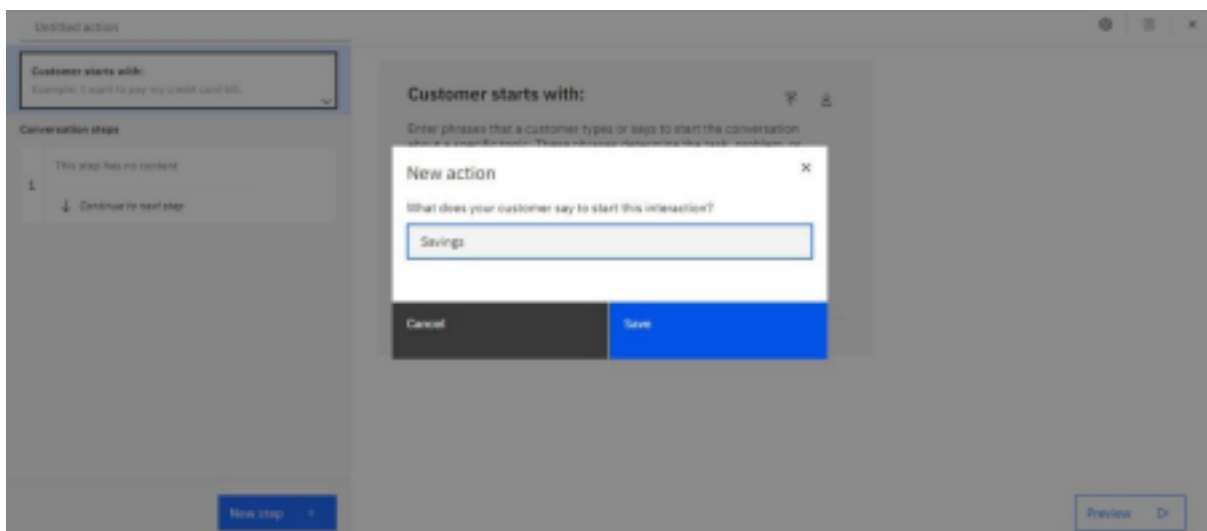
## CREATING SAVINGS ACCOUNT ACTION

**Task assigned:** James saloman J

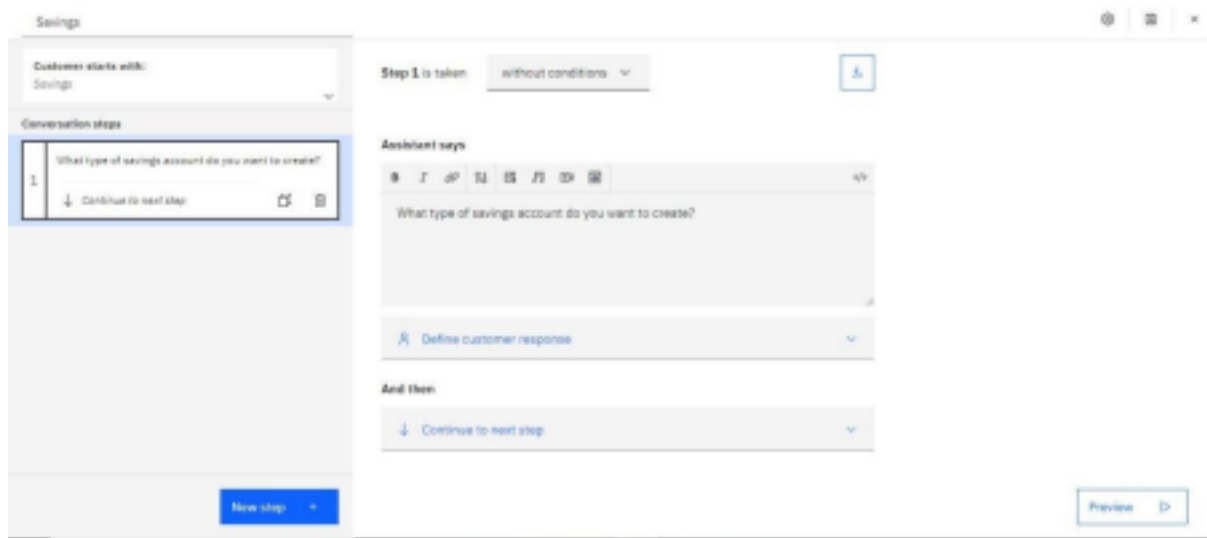
**Task started on:** 06- 11 - 2022

**Task completion date:** 09- 11 - 2022

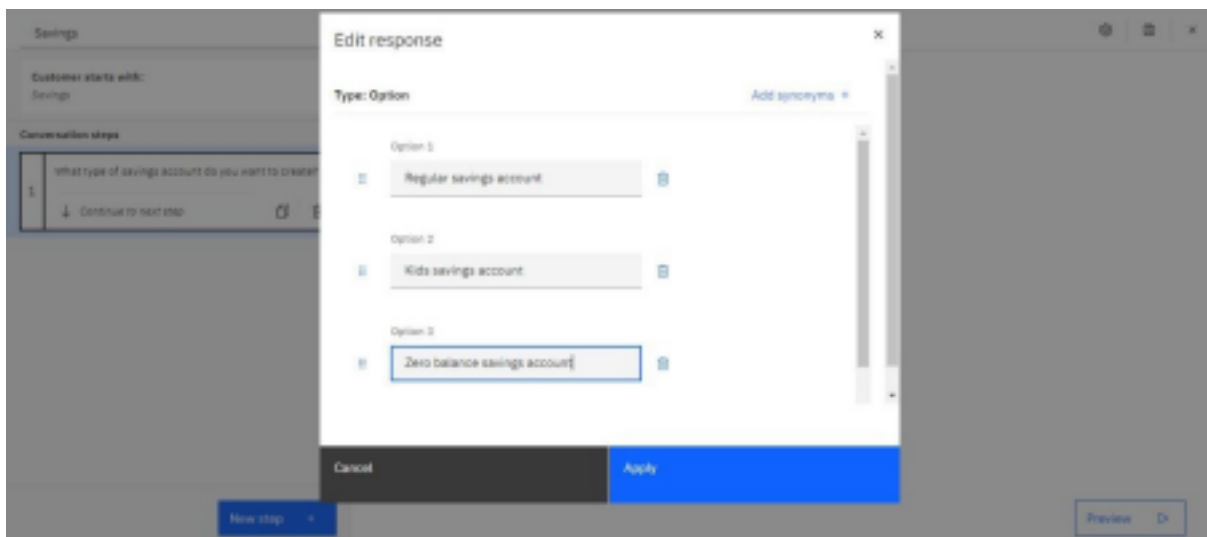
**Progress 1:** Created a new action for the Savings account.



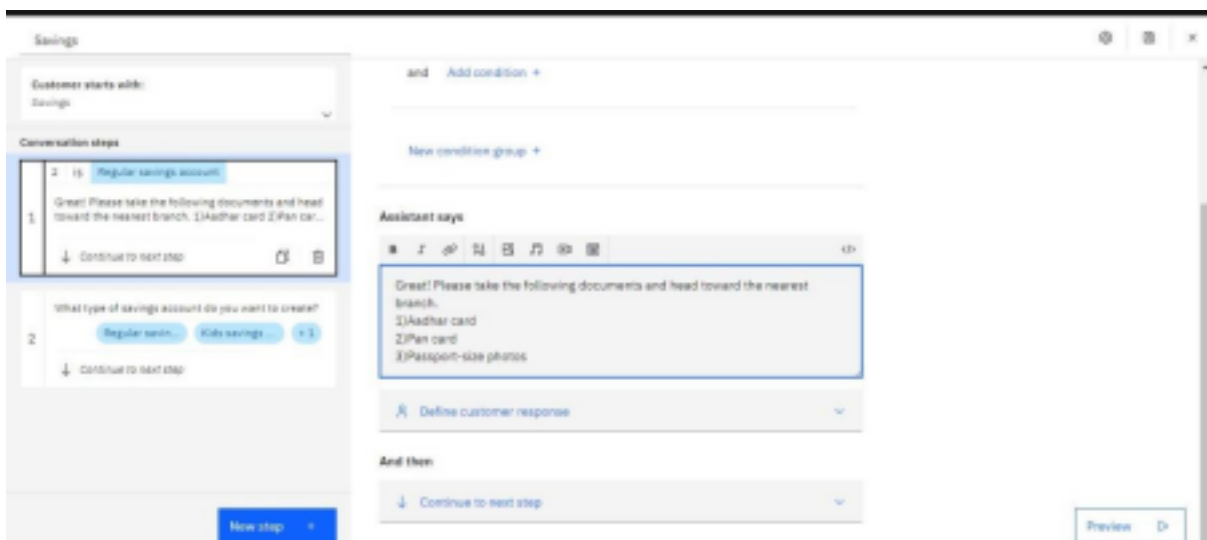
**Progress 2:** Creating the chatbot's response to the savings account message.



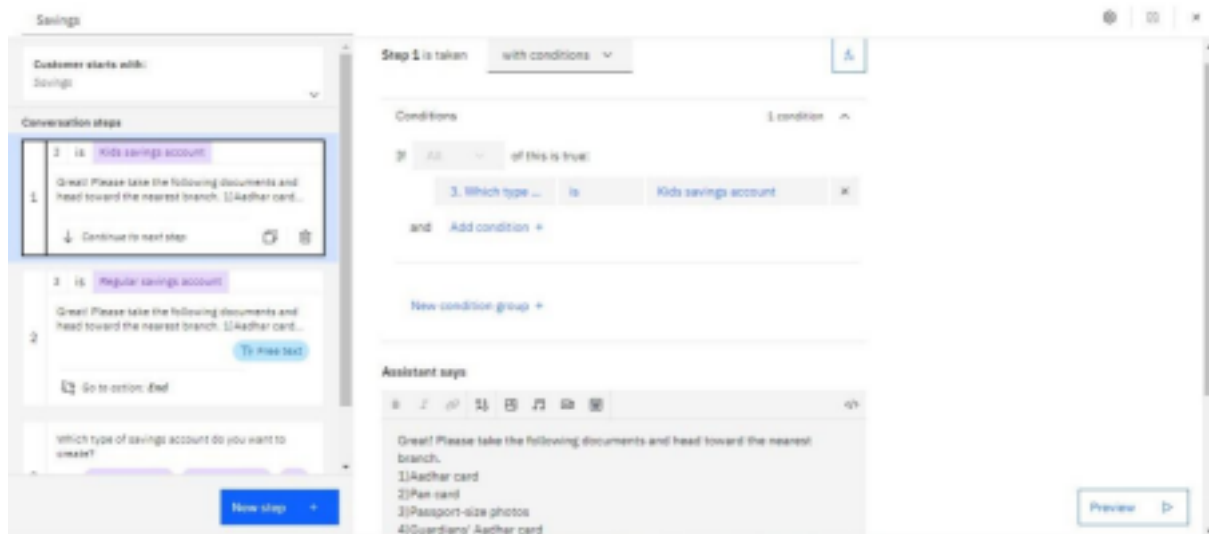
**Progress 3:** Adding available options for savings account action.



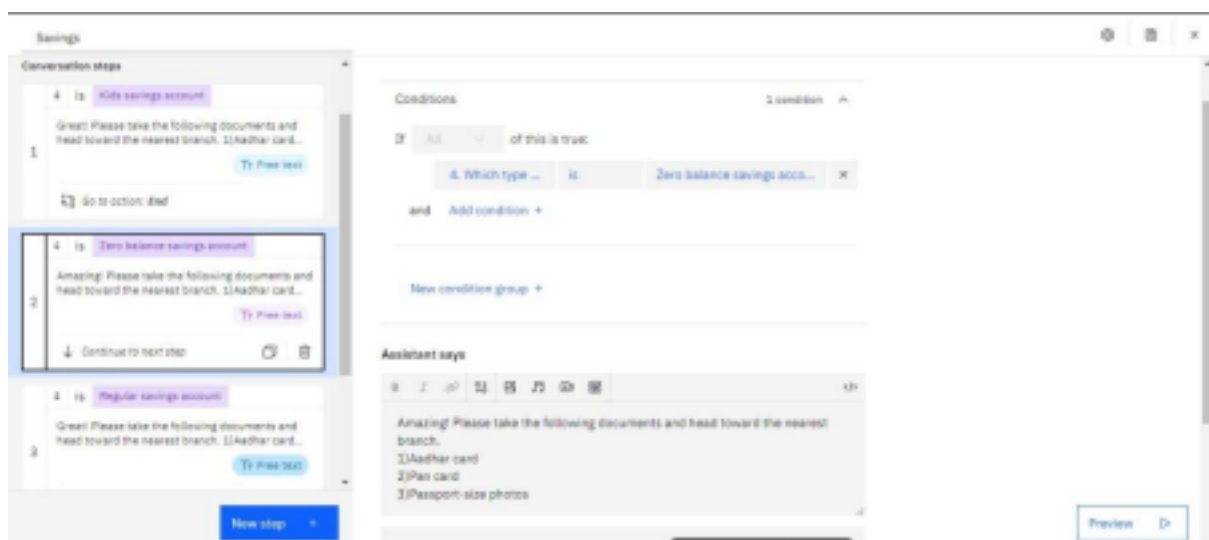
**Progress 4:** The “regular savings account” response is added.



**Progress 5:** The “kids savings account” response is added.



**Progress 6:** The “zero-balance savings account” response is added.



# CREATING CURRENT ACCOUNT ACTION

**Task assigned:** James saloman J

**Task started on:** 06 - 11- 2022

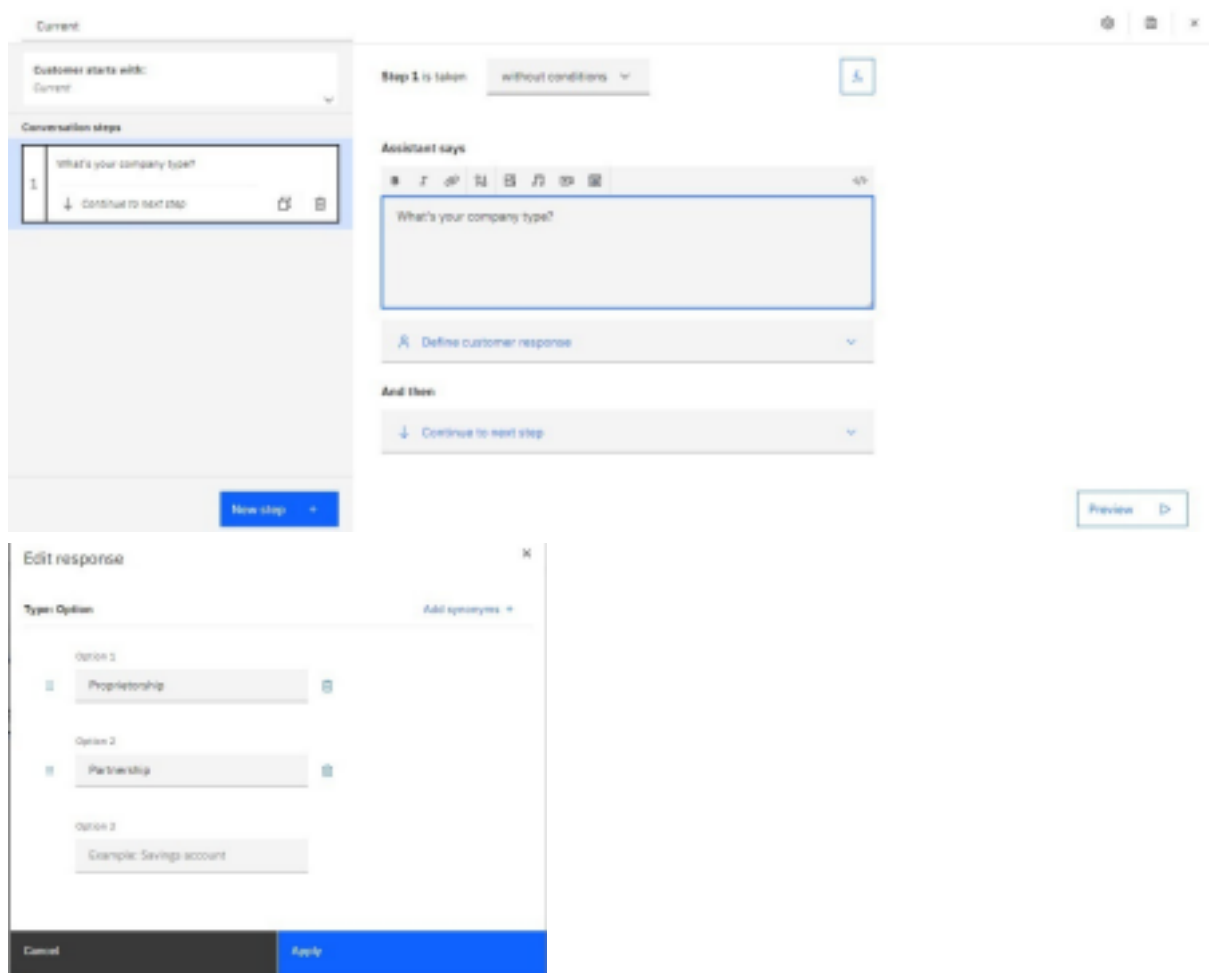
**Task completion date:** 09 - 11 - 2022

**Progress 1:** Creating a new current action.



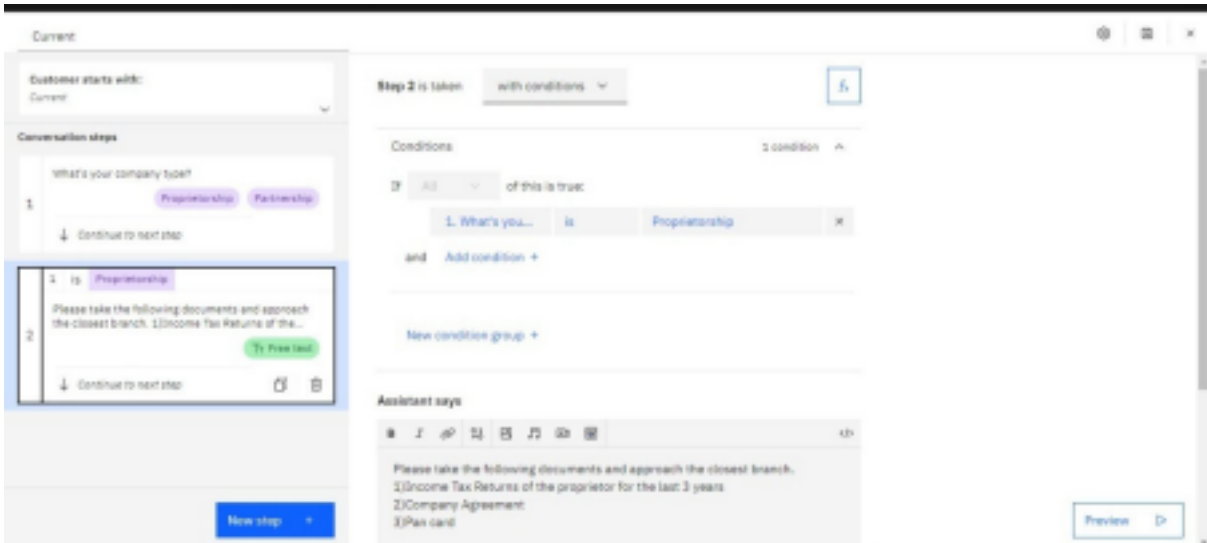
The screenshot shows a 'New action' dialog box with a close button (X) in the top right corner. Below the title, it asks 'What does your customer say to start this interaction?'. A text input field contains the word 'Current'. At the bottom, there are two buttons: 'Cancel' on the left and 'Save' on the right.

**Progress 2:** Asking the user "what's your company type?" and show the available options immediately after the user chooses the current account.

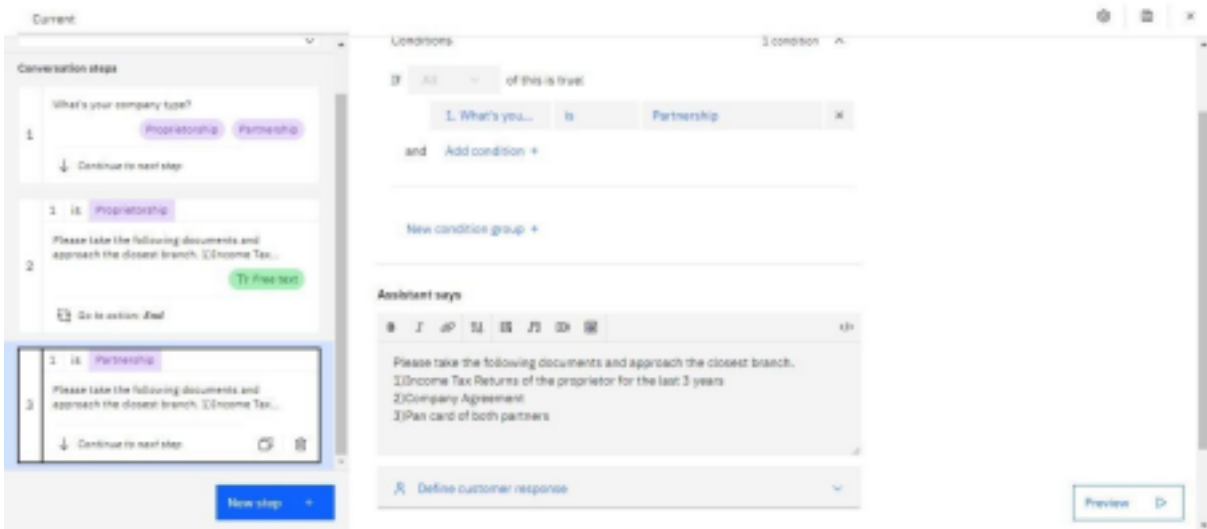


The screenshot displays the 'Current' account setup interface. On the left, a 'Conversation steps' panel shows a list with one step: '1. What's your company type?' with a 'Continue to next step' button. Below this is a 'New step' button. The main area shows 'Step 1 is taken' with a dropdown set to 'without conditions'. Below this, the 'Assistant says' section contains a text input field with 'What's your company type?'. Underneath is a 'Define customer response' dropdown. The 'And then' section has a 'Continue to next step' dropdown. At the bottom right is a 'Preview' button. A second dialog box, 'Edit response', is open in the foreground, showing a list of options: 'Proprietorship', 'Partnership', and 'Example: Savings account'. It has 'Cancel' and 'Apply' buttons at the bottom.

**Progress 3:** The “proprietorship” answer is added.



**Progress 4:** The “partnership” response is being added.



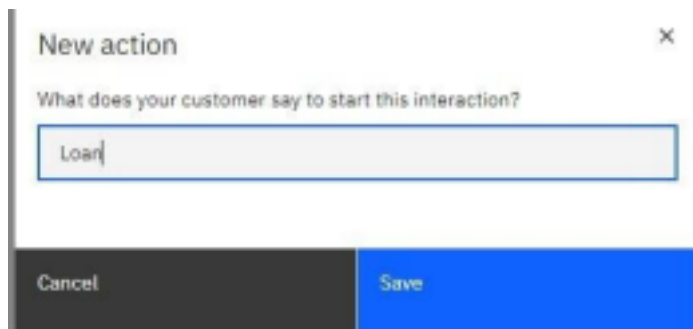
# CREATING LOAN ACCOUNT ACTION

**Task assigned:** Keerdhana.K

**Task started on:** 06- 11 - 2022

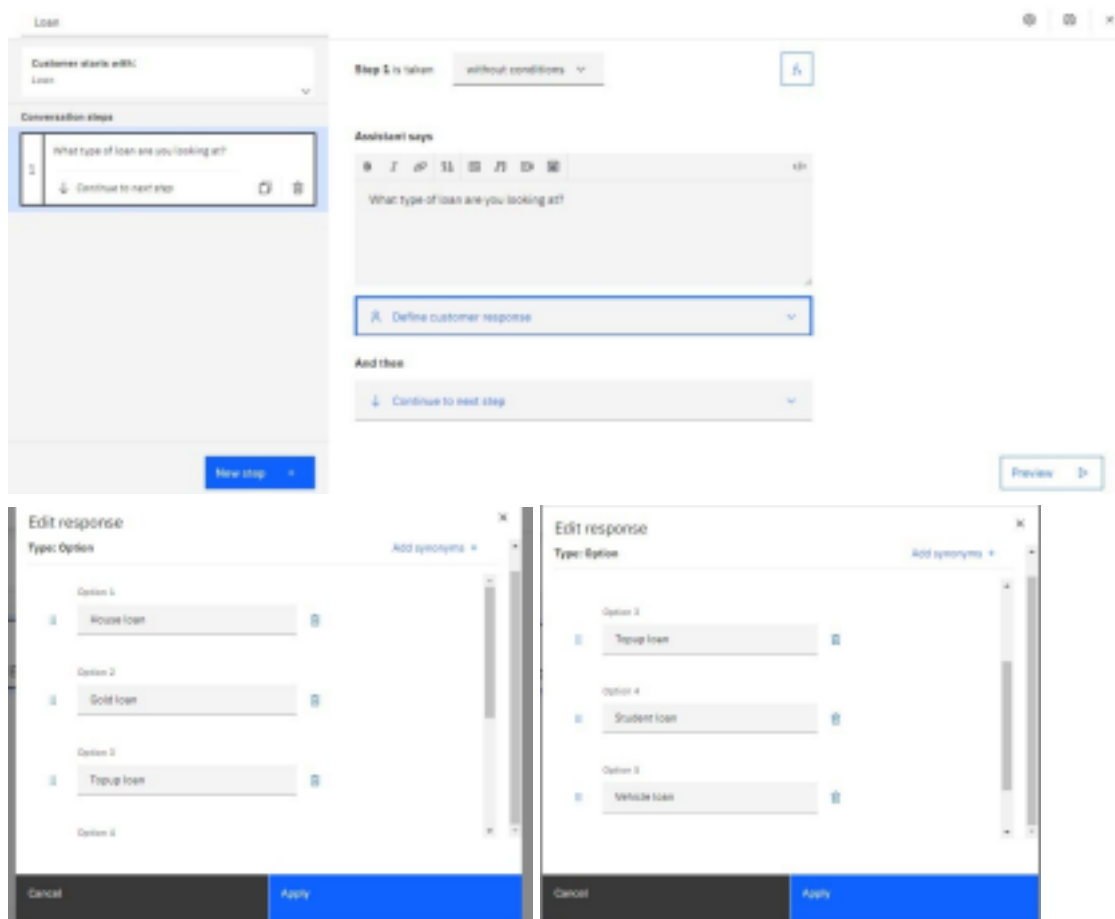
**Task completion date:** 09 - 11 - 2022

**Progress 1:** Created a new action for the Loan account.



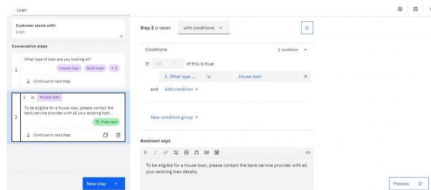
A screenshot of a 'New action' dialog box. The title bar says 'New action' with a close button. The main text asks 'What does your customer say to start this interaction?'. Below this is a text input field containing the word 'Loan'. At the bottom, there are two buttons: 'Cancel' on the left and 'Save'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

**Progress 2:** Asking the user "what type of loan are you looking for" and show the available options immediately after the user chooses the loan account query.

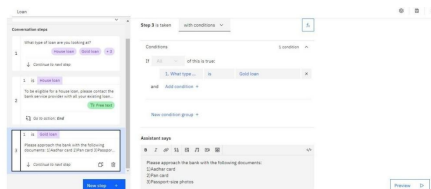


A series of screenshots showing the configuration of a loan account action. The top screenshot shows the 'Loan' configuration page. On the left, under 'Conversation steps', step 1 is defined with the text 'What type of loan are you looking for?'. The main area shows 'Step 1 is taken' with a dropdown set to 'without conditions'. Below this, the 'Assistant says' section contains the same text. The 'Define customer response' dropdown is selected. The 'And then' section has a dropdown set to 'Continue to next step'. A 'Preview' button is at the bottom right. The bottom two screenshots show the 'Edit response' dialog. The left one shows a list of options: 'House loan', 'Gold loan', 'Topup loan', and an empty 'Option 4' field. The right one shows a different set of options: 'Topup loan', 'Student loan', and 'Vehicle loan'.

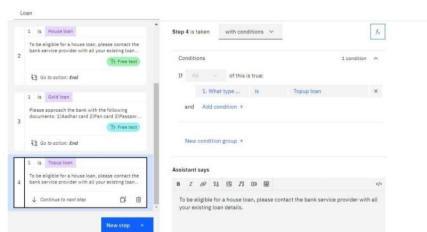
**Progress 3:** The “House loan” response is being added.



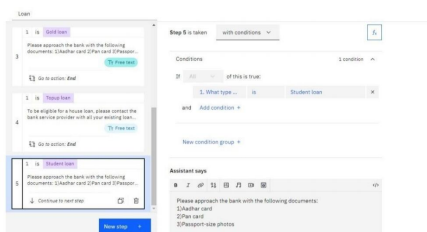
**Progress 4:** The “Gold loan” response is being added.



**Progress 5:** The “Top-up loan” response is being added.

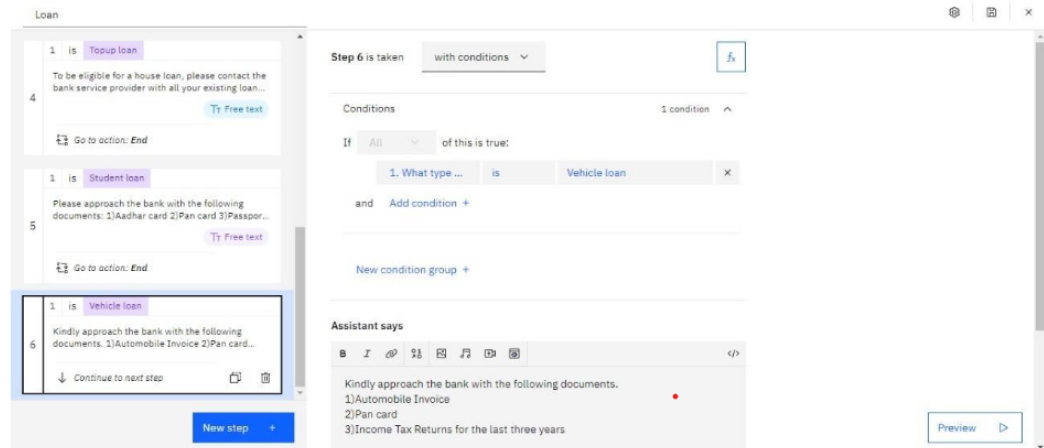


**Progress 6:** The “Student loan” response is being added.



**Progress 7:** The “Vehicle loan” response is being added.

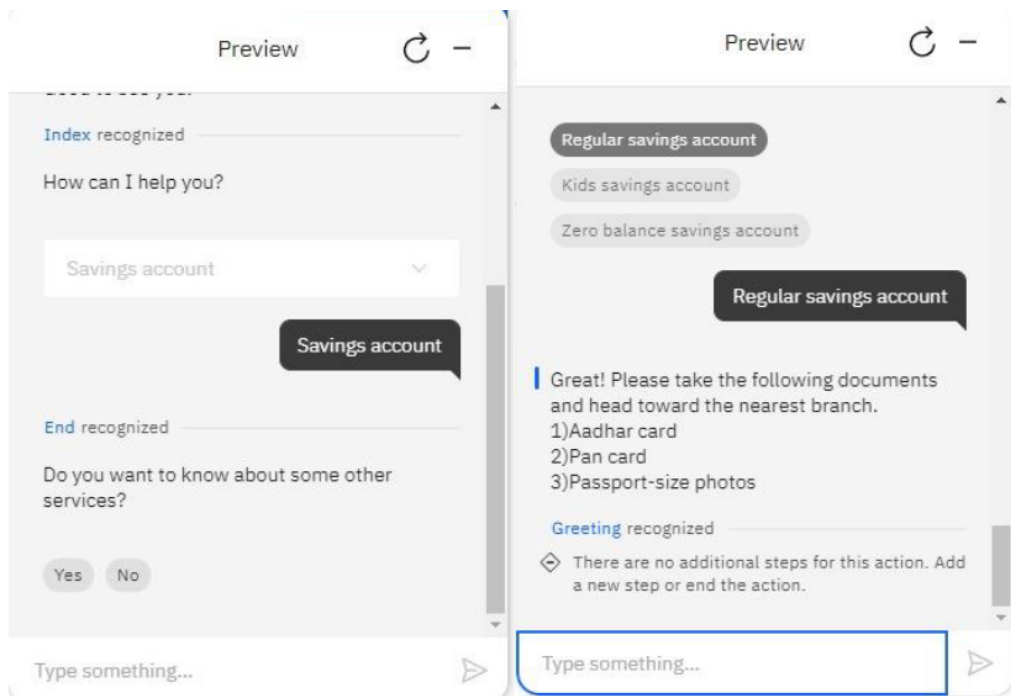




## Testing the chatbot

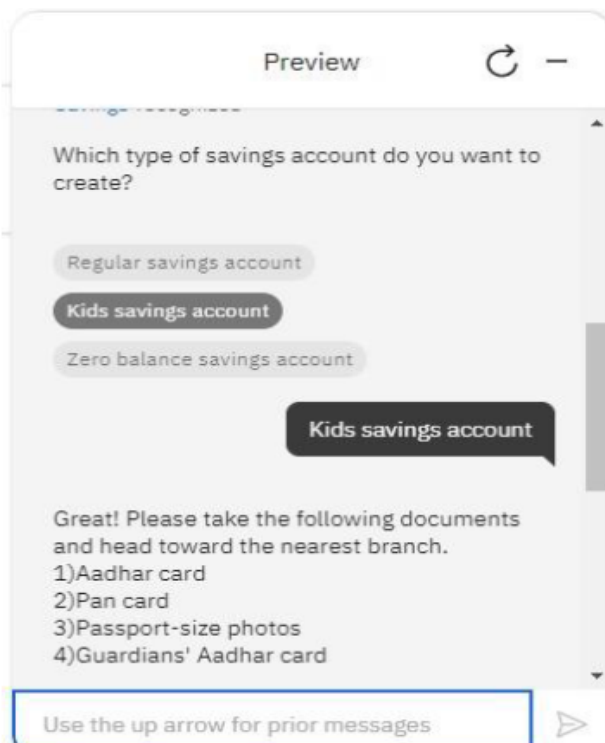
The Savings Account Action is being tested.

Testing 1: Savings account and Regular savings account.



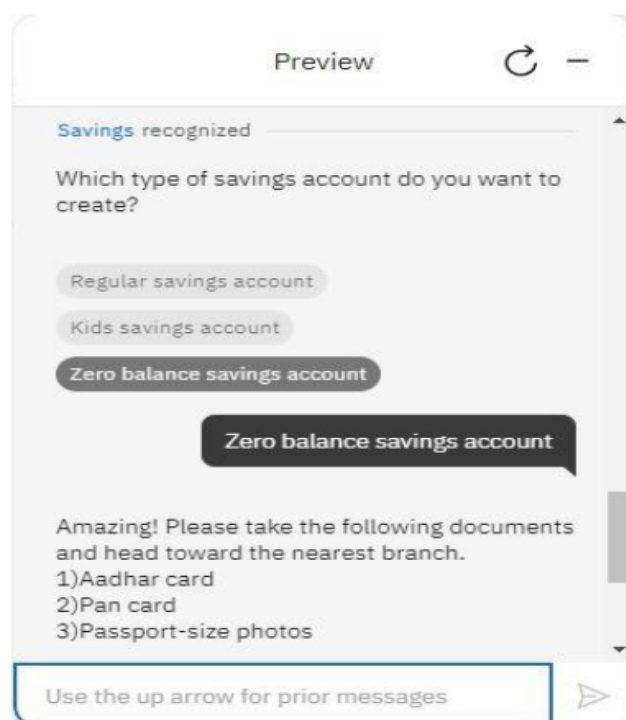
Test result: passed

## Testing 2: Kids savings account.



**Test result:** passed

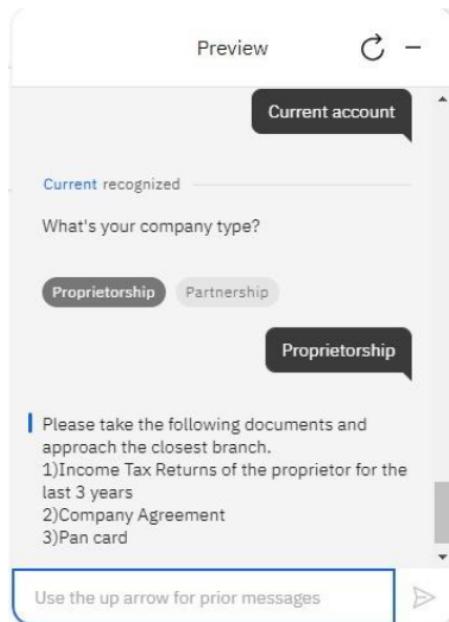
## Testing 3: Zero balance savings account.



**Test result:** passed

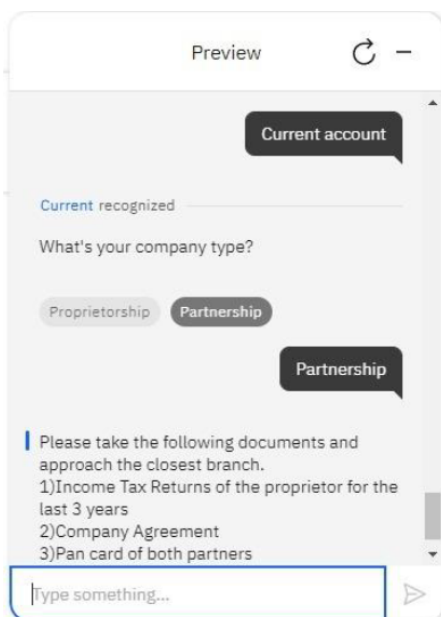
## The Current Account Action is being tested. Testing

### 1: Proprietorship.



**Test result:** passed

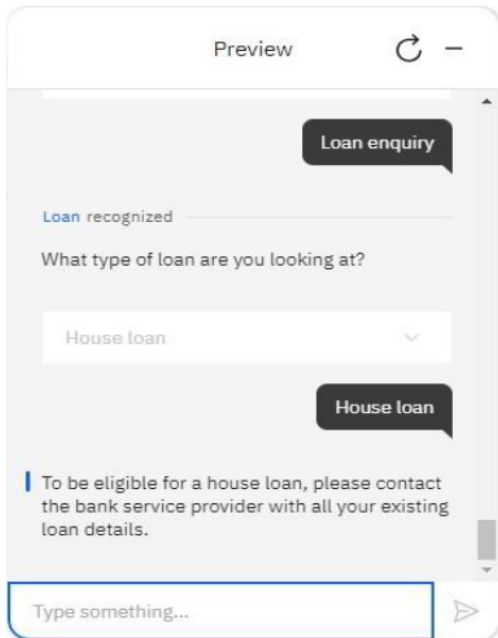
### Testing 2: Partnership.



**Test result:** passed

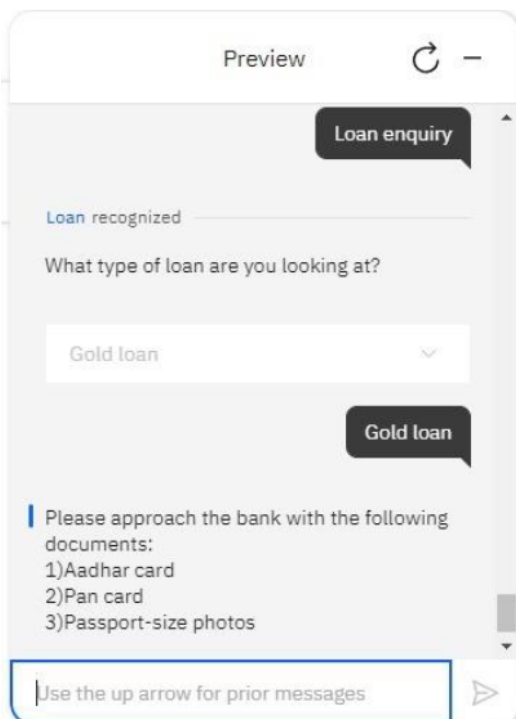
**The Loan Account Action is being tested.**

**Testing 1:** Loan enquiry and House loan



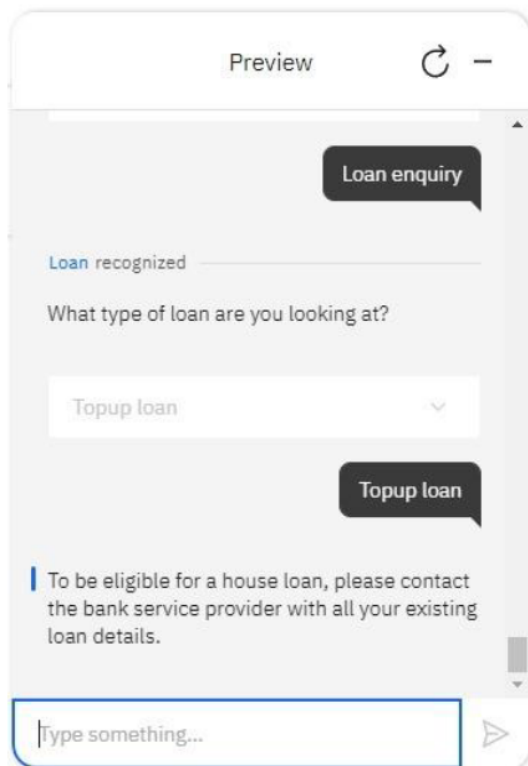
**Test result:** passed

**Testing 2:** Gold loan



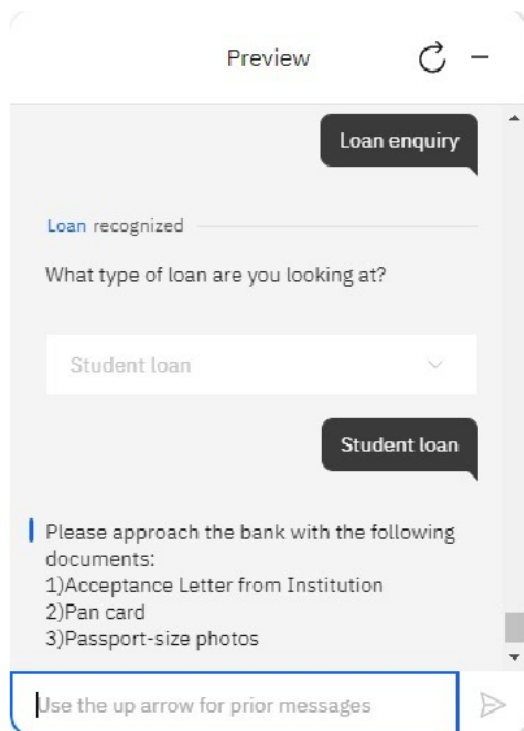
**Test result:** passed

### Testing 3: top-up loan.



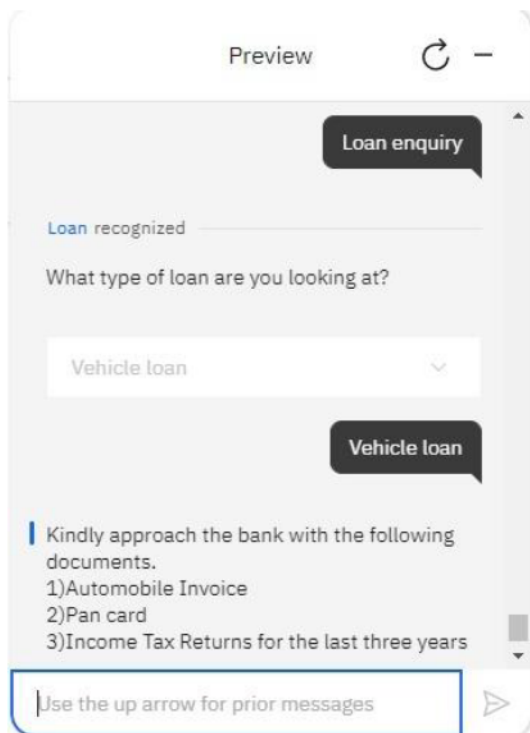
**Test result:** passed

### Testing 4: Student loan.



**Test result:** passed

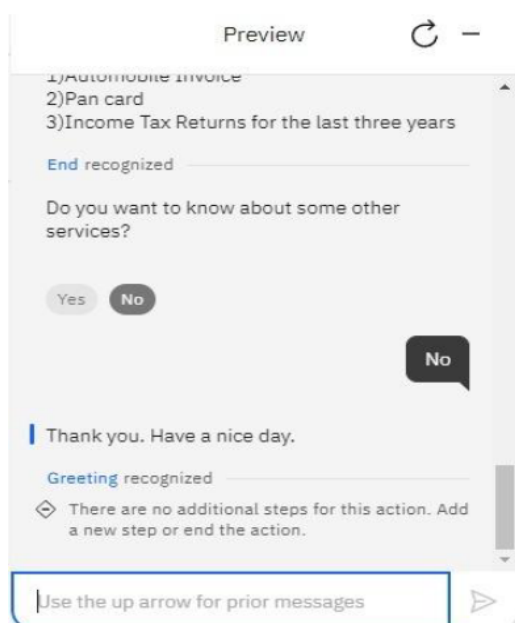
### Testing 5: Vehicle loan.



**Test result:** passed

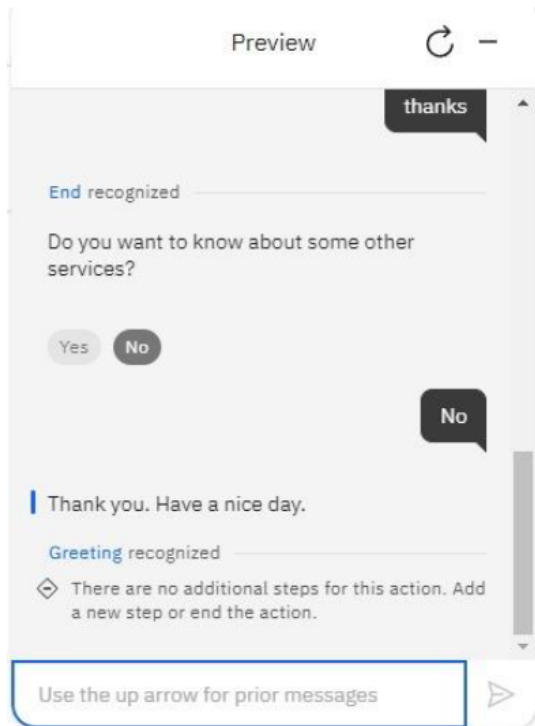
**All existing actions and conversation-ending action links are being tested.**

### Testing 1: without free-text feature



**Test result:** passed

## Testing 2: with free-text feature



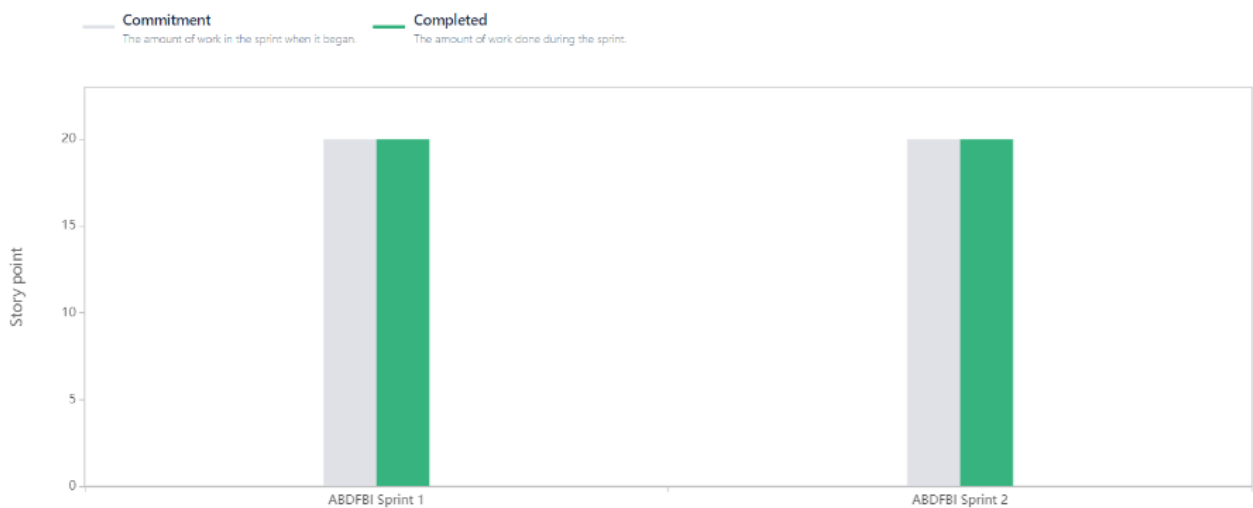
**Test result:** passed

## JIRA

Projects / AI Based Discourse For Banking Industry / Reports

### Velocity report

[How to read this report](#)



# Sprint burndown chart

Sprint

ABDFBI Sprint 2

Estimation field

Story points

**Date** - October 31st, 2022 - November 6th, 2022

**Sprint goal** - Creating Saving Account Action , Creating Current Account Action , Creating Loan Account Action

