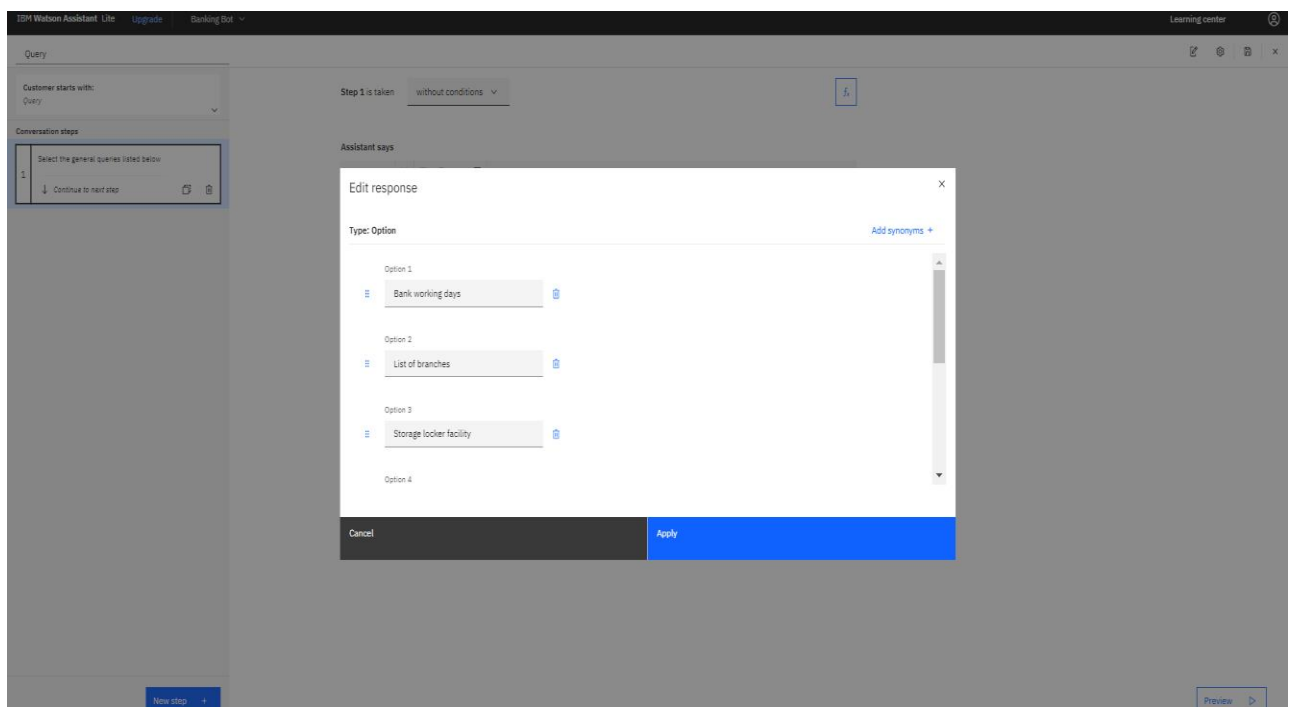
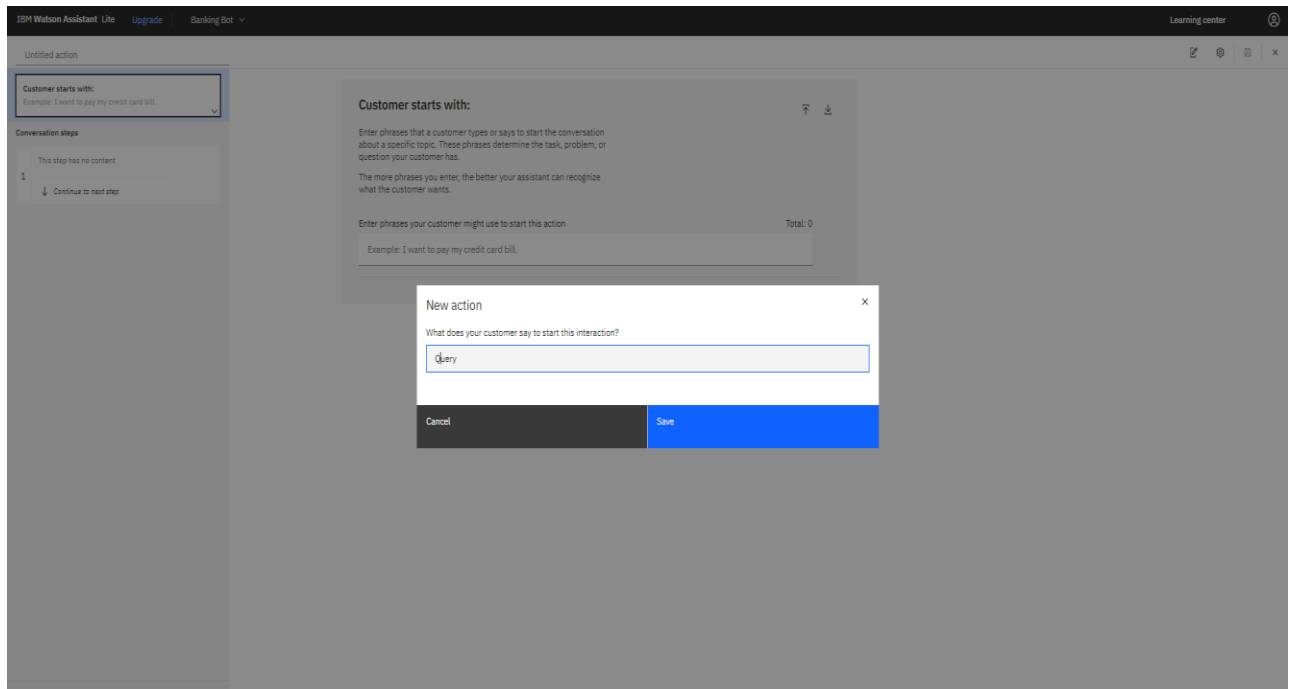


CREATING GENERAL QUERY ACTION

TEAM ID	PNT2022TMID08538
PROJECT NAME	AI BASED DISCOURSE FOR BANKING INDUSTRY

Creating General query



Banking working days:

The screenshot shows the IBM Watson Assistant interface for a 'Banking Bot'. The left sidebar displays the 'Conversation steps' for the query 'Customer starts with: Query'. Step 1 is 'Bank working days' with a 'Continue to next step' action. Step 2 is 'Monday through Friday are Indian Bank's working days' with a 'Go to action: End' action. The main workspace shows the configuration for Step 2, which is 'Step 2 is taken' with conditions. The condition is 'If All of this is true: 1. Select the general queries listed below is Bank working days'. The 'Assistant says' section shows the response 'Monday through Friday are Indian Bank's working days.' The 'And then' section shows the action 'Go to another action' with 'End' as the 'Goes to action'.

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Query

Customer starts with: Query

Conversation steps

Select the general queries listed below

1 Bank working days List of branches +4

Continue to next step

1 is Bank working days

2 Monday through Friday are Indian Bank's working days.

Go to action: End

New step +

Step 2 is taken with conditions 5

Conditions 1 condition

If All of this is true:

1. Select the general queries listed below is Bank working days

and Add condition +

New condition group +

Assistant says

Monday through Friday are Indian Bank's working days.

Define customer response

And then

Go to another action

Goes to action End

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

List of branches:

The screenshot shows the IBM Watson Assistant interface for a 'Banking Bot'. The left sidebar displays the 'Conversation steps' for the query 'Customer starts with: Query'. Step 1 is 'Bank working days' with a 'Continue to next step' action. Step 2 is 'Monday through Friday are Indian Bank's working days' with a 'Go to action: End' action. Step 3 is 'List of branches' with a 'Go to action: End' action. The main workspace shows the configuration for Step 3, which is 'Step 3 is taken' with conditions. The condition is 'If All of this is true: 1. Select the general queries listed below is List of branches'. The 'Assistant says' section shows the response 'Peelamedu, Gandhipuram, RS Puram, Ukkadam, Singanailoor'. The 'And then' section shows the action 'Go to another action' with 'End' as the 'Goes to action'.

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Query

Customer starts with: Query

Conversation steps

Select the general queries listed below

1 Bank working days List of branches +4

Continue to next step

1 is Bank working days

2 Monday through Friday are Indian Bank's working days.

Go to action: End

1 is List of branches

2 Peelamedu, Gandhipuram, RS Puram, Ukkadam, Singanailoor

Go to action: End

New step +

Step 3 is taken with conditions 5

Conditions 1 condition

If All of this is true:

1. Select the general queries listed below is List of branches

and Add condition +

New condition group +

Assistant says

Peelamedu, Gandhipuram, RS Puram, Ukkadam, Singanailoor

Define customer response

And then

Go to another action

Goes to action End

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

Storage locker facility:

The screenshot displays the IBM Watson Assistant interface for a Banking Bot. On the left, the 'Conversation steps' panel shows a sequence of steps: 'Bank working days', 'List of branches', and 'Storage locker facility'. The 'Storage locker facility' step is highlighted, showing its details: 'Safe Deposit Locker facility is one of the ancillary services provided by the Bank to its customers...'. The main workspace shows the configuration for 'Step 4 is taken' with conditions. The condition is 'If All of this is true: 1. Select the general queries listed below is Storage locker facility'. Below the conditions, the 'Assistant says' section contains the response: 'Safe Deposit Locker facility is one of the ancillary services provided by the Bank to its customers. Lockers Branches are equipped with high security features and specially built strong rooms. Locker facility is available in over 2500 branches across the country.' The 'And then' section shows the action 'Go to another action' with 'End' as the target action.

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Query

Customer starts with: Query

Conversation steps

Select the general queries listed below

1 Bank working days List of branches +4

Continue to next step

1 is Bank working days

Monday through Friday are Indian Bank's working days.

Go to action: End

1 is List of branches

Peelamedu, Gandhipuram, RS Puram, Ukkadam, Singanailoor

Go to action: End

1 is Storage locker facility

Safe Deposit Locker facility is one of the ancillary services provided by the Bank to its customers...

Go to action: End

New step +

Step 4 is taken with conditions

Conditions

1 condition

If All of this is true:

1. Select the general queries listed below is Storage locker facility

and Add condition +

New condition group +

Assistant says

Safe Deposit Locker facility is one of the ancillary services provided by the Bank to its customers. Lockers Branches are equipped with high security features and specially built strong rooms. Locker facility is available in over 2500 branches across the country.

Define customer response

And then

Go to another action

Goes to action End

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

Currency conversion facility:

The screenshot displays the IBM Watson Assistant interface for a Banking Bot. On the left, the 'Conversation steps' panel shows a sequence of steps: 'Bank working days', 'List of branches', 'Storage locker facility', and 'Currency conversion facility'. The 'Currency conversion facility' step is highlighted, showing its details: 'Many banks and credit unions exchange currency for their customers. It may cost a small fee, but it will likely be the best exchange rate you can get...'. The main workspace shows the configuration for 'Step 5 is taken' with conditions. The condition is 'If All of this is true: 1. Select the general queries listed below is Currency conversion facility'. Below the conditions, the 'Assistant says' section contains the response: 'Many banks and credit unions exchange currency for their customers. It may cost a small fee, but it will likely be the best exchange rate you can get.' The 'And then' section shows the action 'Go to another action' with 'End' as the target action.

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Query

Customer starts with: Query

Conversation steps

Select the general queries listed below

1 Bank working days List of branches +4

Continue to next step

1 is Bank working days

Monday through Friday are Indian Bank's working days.

Go to action: End

1 is List of branches

Peelamedu, Gandhipuram, RS Puram, Ukkadam, Singanailoor

Go to action: End

1 is Storage locker facility

Safe Deposit Locker facility is one of the ancillary services provided by the Bank to its customers...

Go to action: End

1 is Currency conversion facility

Many banks and credit unions exchange currency for their customers. It may cost a small fee, but it will likely be the best exchange rate you can get...

Go to action: End

New step +

Step 5 is taken with conditions

Conditions

1 condition

If All of this is true:

1. Select the general queries listed below is Currency conversion facility

and Add condition +

New condition group +

Assistant says

Many banks and credit unions exchange currency for their customers. It may cost a small fee, but it will likely be the best exchange rate you can get.

Define customer response

And then

Go to another action

Goes to action End

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

Find the nearest branch:

The screenshot shows the IBM Watson Assistant interface for a Banking Bot. The left sidebar displays a list of steps, with step 7, 'Find a nearest branch', highlighted. The main workspace shows the configuration for this step. It is set to 'with conditions' and has one condition: '1. Select the general queries listed be... is Find a nearest branch'. The 'Assistant says' section contains a message about online tools and a URL. The 'And then' section is set to 'Go to another action', with 'End' selected as the action to go to.

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Query

1 is **Bank working days**
Monday through Friday are Indian Bank's working days.
Go to action: End

1 is **List of branches**
Peelamedu, Gandhipuram, RS Puram, Ukkadam, Singanailoor
Go to action: End

1 is **Storage locker facility**
Safe Deposit Locker facility is one of the ancillary services provided by the Bank to its customers...
Go to action: End

1 is **Currency conversion facility**
Many banks and credit unions exchange currency for their customers. It may cost a small fee, but i...
Go to action: End

1 is **CIBIL**
CIBIL Score is a three-digit numeric summary of your credit history. The score is derived using the...
Go to action: End

1 is **Find a nearest branch**
You can make use of online tools available for the particular bank you search for...
Go to action: End

New step +

Step 7 is taken with conditions

Conditions 1 condition

If All of this is true:

1. Select the general queries listed be... is Find a nearest branch

and Add condition +

New condition group +

Assistant says

You can make use of online tools available for the particular bank you search for. For example: <https://near-me.hdfcbank.com/branch-atm-locator/>

Define customer response

And then

Go to another action

Goes to action: End

Pass values

Upon return: Continue

Edit settings Edit passed values

Preview

Now we have to link this action to the index action

The screenshot shows the IBM Watson Assistant interface for a Banking Bot. The left sidebar displays a list of steps, with step 2, 'General query', highlighted. The main workspace shows the configuration for this step. It is set to 'with conditions' and has one condition: '2. How can I help you? is General query'. The 'Assistant says' section contains a message about transfer types. The 'And then' section is set to 'Go to another action', with 'Query' selected as the action to go to.

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Index

Customer starts with: Index

Conversation steps

2 is **General query**
This step has no content
Go to action: Query

How can I help you?
Net banking General query +3
Continue to next step

2 is **Loan enquiry**
This step has no content
Go to action: Loan

2 is **Current account**
This step has no content
Go to action: Current

2 is **Savings account**
This step has no content
Go to action: savings

New step +

Step 1 is taken with conditions

Conditions 1 condition

If All of this is true:

2. How can I help you? is General query

and Add condition +

New condition group +

Assistant says

For example: What type of transfer would you like to make?

Define customer response

And then

Go to another action

Goes to action: Query

Pass values

Upon return: Continue

Edit settings Edit passed values

Preview

Preview:

The screenshot displays the IBM Watson Assistant interface for a 'Banking Bot'. The top navigation bar includes 'IBM Watson Assistant', 'Life', 'Upgrade', 'Banking Bot', and a 'Learning center' link. The interface is divided into three main sections:

- Index:** A sidebar on the left showing a list of conversation steps. The first step is 'General query', which is currently selected and highlighted. Other steps include 'Loan enquiry', 'Current account', and 'Savings account'.
- Step 2 is taken:** The main workspace for defining the bot's logic. It shows a condition: 'If All of this is true: 1. How can I help you? is General query'. Below this, there is a section for 'Assistant says' with a text area for a response and a 'Define customer response' button. The 'And then' section shows a 'Go to another action' button, which is currently set to 'Query'.
- Preview:** A window on the right showing a simulated chat conversation. It starts with a 'General query' message, followed by a response from the bot: 'Many banks and credit unions exchange currency for their customers. It may cost a small fee, but it will likely be the best exchange rate you can get.' The preview window also shows a 'Currency conversion facility' button and a 'Do you want to know about any other services?' prompt.

As our entire project is about creating a chatbot using Watson Assistant, we have comparatively less coding part. Hardly we are having about 2 to 3 coding areas which are not necessarily needed in this task.

So, we just attached screenshots of the entire process of developing a chatbot.