

## Creating Loan Account Actions:

IBM Watson Assistant Lite Upgrade Banking bot Learning center

Loan

Customer starts with: Loan

Conversation steps

1 This step has no content

1 is Home Loan Gold Loan +3

Continue to next step

1 is Gold Loan

2 Please approach the bank with the following documents: 1.PAN Card 2.Aadhar Card 3.Passport...

Go to action: End

1 is Top up Loan

3 To eligible for top-up loan please contact our bank services provides with all existing loan details.

Go to action: End

1 is Vehicle Loan

Kindly approach the bank with the following documents: 1.PAN Card 2.Aadhar Card 3.Passport...

New step +

Preview

Customer starts with:

Enter phrases that a customer types or says to start the conversation about a specific topic. These phrases determine the task, problem, or question your customer has.

The more phrases you enter, the better your assistant can recognize what the customer wants.

Enter phrases your customer might use to start this action Total: 1

Enter a phrase

Loan

IBM Watson Assistant Lite Upgrade Banking bot Learning center

Loan

Customer starts with: Loan

Conversation steps

1 This step has no content

1 is Home Loan Gold Loan +1

Continue to next step

1 is Gold Loan

2 Please approach the bank with the following documents: 1.PAN Card 2.Aadhar Card 3.Passport siz...

Go to action: End

3 This step has no content

Continue to next step

Step 2 is taken with conditions

Conditions 1 condition

If All of this is true:

1. No response is Gold Loan

and Add condition +

New condition group +

Assistant says

Please approach the bank with the following documents:

1.PAN Card

2.Aadhar Card

3.Passport size photo

Define customer response

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Loan

Customer starts with:  
Loan

Conversation steps

This step has no content

1

Home LoanGold Loan+3

Continue to next step

1 is Gold Loan

2

Please approach the bank with the following documents: 1.PAN Card 2.Aadhar Card 3.Passport...

Go to action: End

1 is Top up Loan

3

To eligible for top-up loan please contact our bank services provides with all existing loan details.

Go to action: End

1 is Vehicle Loan

4

Kindly approach the bank with the following documents: <br /> 1. Automobile Invoice 2. PAN...

New step +

Step 2 is taken with conditions

Conditions1 condition

If All of this is true:

1. No response is Gold Loan

and Add condition +

New condition group +

Assistant says

Please approach the bank with the following documents:  
1.PAN Card  
2.Aadhar Card  
3.Passport size photo

Define customer response

Preview

IBM Watson Assistant LiteUpgradeBanking botLearning center

Loan

Go to action: End

1 is Top up Loan

3

To eligible for top-up loan please contact our bank services provides with all existing loan details.

Go to action: End

1 is Vehicle Loan

4

Kindly approach the bank with the following documents: <br /> 1. Automobile Invoice 2. PAN...

Go to action: End

5

Please visit the nearest available bank with the following documents <br /> 1. Student ID card 2...

Go to action: End

6

To be eligible for the House loan please contact our bank services providers with all existing loan...

Continue to next step

New step +

Step 3 is taken with conditions

Conditions1 condition

If All of this is true:

1. No response is Top up Loan

and Add condition +

New condition group +

Assistant says

To eligible for top-up loan please contact our bank services provides with all existing loan details.

Define customer response

Preview

IBM Watson Assistant LiteUpgradeBanking botLearning center

Loan

Go to action: End

1 is Top up Loan

3

To eligible for top-up loan please contact our bank services provides with all existing loan details.

Go to action: End

1 is Vehicle Loan

4

Kindly approach the bank with the following documents: <br /> 1. Automobile Invoice 2. PAN...

Go to action: End

5

Please visit the nearest available bank with the following documents <br /> 1. Student ID card 2...

Go to action: End

6

To be eligible for the House loan please contact our bank services providers with all existing loan...

Continue to next step

New step +

Step 4 is taken with conditions

Conditions1 condition

If All of this is true:

1. No response is Vehicle Loan

and Add condition +

New condition group +

Assistant says

Kindly approach the bank with the following documents:  
1. Automobile Invoice  
2. PAN Card  
3. Income Tax Returns for the last three years

Define customer response

Preview

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Learning center

Loan

Go to action: End

1 is Top up Loan  
To eligible for top-up loan please contact our bank services provides with all existing loan details.  
Go to action: End

1 is Vehicle Loan  
Kindly approach the bank with the following documents: <br /> 1. Automobile Invoice 2. PAN...  
Go to action: End

5 Please visit the nearest available bank with the following documents <br /> 1. Student ID card 2...  
Go to action: End

6 To be eligible for the House loan please contact our bank services providers with all existing loan...  
Continue to next step

New step +

Step 5 is taken without conditions

Assistant says

Please visit the nearest available bank with the following documents  
1. Student ID card  
2. PAN Card  
3. Aadhar Card  
4. Passport size photos

Define customer response

And then

Go to another action

Goes to action	End
Pass values	
Upon return	Continue

Edit settings Edit passed values

Preview

IBM Watson Assistant LiteUpgradeBanking bot

Learning center

Loan

Go to action: End

1 is Top up Loan  
To eligible for top-up loan please contact our bank services provides with all existing loan details.  
Go to action: End

1 is Vehicle Loan  
Kindly approach the bank with the following documents: <br /> 1. Automobile Invoice 2. PAN...  
Go to action: End

5 Please visit the nearest available bank with the following documents <br /> 1. Student ID card 2...  
Go to action: End

6 To be eligible for the House loan please contact our bank services providers with all existing loan...  
Continue to next step

New step +

Step 6 is taken without conditions

Assistant says

To be eligible for the House loan please contact our bank services providers with all existing loan details.

Define customer response

And then

Continue to next step

Preview

Preview

Greet customer [default]  
Welcome, how can I assist you?

hai

Savings recognized  
How can I help you?

Current Account Netbanking  
General Queries

Home Loan

Loan topic changed  
Please visit the nearest available bank with the following documents

Use the up arrow for prior messages

Preview



Please visit the nearest available bank with the following documents

1. Student ID card
2. PAN Card
3. Aadhar Card
4. Passport size photos

go to [End](#)

Do you want to know about some other services?

☐ Yes

☐ No

Student Loan