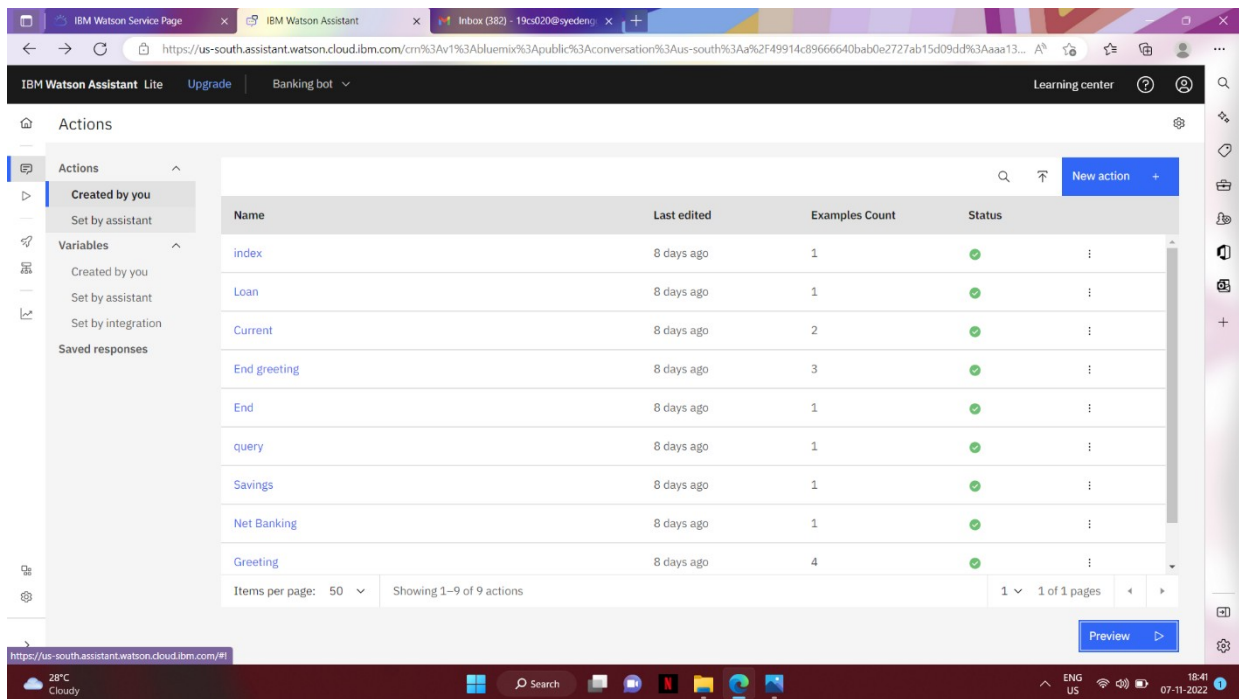


AI BASED DISCOURSE FOR BANKING INDUSTRY

Team ID: PNT2022TMID48208

Creating Skills And Assistant For Chatbot:

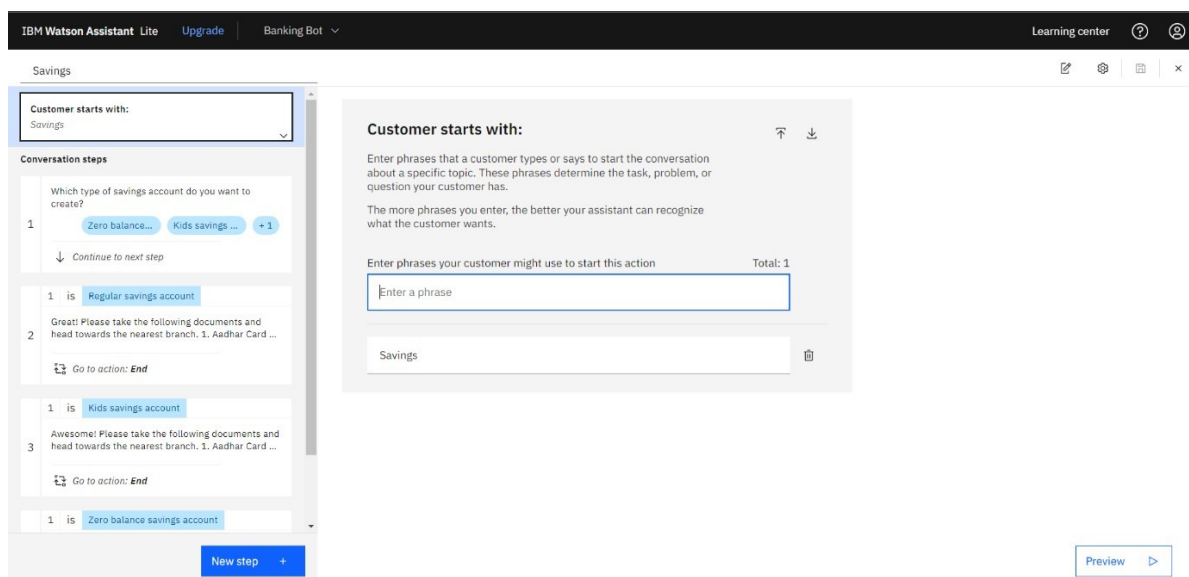
Chatbot Skills Creation:



The screenshot shows the IBM Watson Assistant interface for a 'Banking bot'. The 'Actions' tab is selected, displaying a table of actions created by the user. The table has columns for Name, Last edited, Examples Count, and Status. The actions listed are: index, Loan, Current, End greeting, End, query, Savings, Net Banking, and Greeting. Each action has a status of 'Active' and a green checkmark. The 'Examples Count' for each action is: index (1), Loan (1), Current (2), End greeting (3), End (1), query (1), Savings (1), Net Banking (1), and Greeting (4). The interface also includes a sidebar with navigation options like 'Variables' and 'Saved responses', and a bottom status bar showing the date and time.

Name	Last edited	Examples Count	Status
index	8 days ago	1	Active
Loan	8 days ago	1	Active
Current	8 days ago	2	Active
End greeting	8 days ago	3	Active
End	8 days ago	1	Active
query	8 days ago	1	Active
Savings	8 days ago	1	Active
Net Banking	8 days ago	1	Active
Greeting	8 days ago	4	Active

Creating Saving Account Action:



The screenshot shows the IBM Watson Assistant interface for creating a 'Savings' action. The 'Savings' tab is selected, and the 'Customer starts with:' section is visible. The 'Conversation steps' section shows a sequence of steps for creating a savings account. The first step is 'Which type of savings account do you want to create?' with options 'Zero balance...', 'Kids savings ...', and '+1'. The second step is '1 is Regular savings account' with a description 'Great! Please take the following documents and head towards the nearest branch. 1. Aadhar Card ...'. The third step is '1 is Kids savings account' with a description 'Awesome! Please take the following documents and head towards the nearest branch. 1. Aadhar Card ...'. The fourth step is '1 is Zero balance savings account'. The interface also includes a sidebar with navigation options like 'Variables' and 'Saved responses', and a bottom status bar showing the date and time.

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

Savings

Creating Current Account Action:

The screenshot shows the IBM Watson Assistant interface for creating a new action named 'Current'. The top navigation bar includes 'IBM Watson Assistant Lite', 'Upgrade', 'Banking Bot', and 'Learning center'. The left sidebar shows the 'Current' action selected. The main content area is divided into two panels. The left panel, titled 'Conversation steps', shows a sequence of steps: 1. 'What's your company type?' with options 'Partnership' and 'Proprietorship'. 2. 'Please take the following Documents and approach the closest branch 1.Income Tax Returns of the proprie...' with a 'Go to action: End' button. 3. 'Please take the following Documents and approach the closest branch 1.Income Tax Returns of the all the...' with a 'Go to action: End' button. The right panel, titled 'Customer starts with:', provides instructions on how to start the conversation and a list of phrases to use. The list includes 'Current' and 'Current account'. A 'Preview' button is located at the bottom right.

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Current

Customer starts with:
Current account

Conversation steps

1 What's your company type?
Partnership Proprietorship
Continue to next step

1 is Proprietorship
2 Please take the following Documents and approach the closest branch 1.Income Tax Returns of the proprie...
Go to action: End

1 is Partnership
3 Please take the following Documents and approach the closest branch 1.Income Tax Returns of the all the...
Go to action: End

New step +

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: 2
Enter a phrase
Current
Current account
Preview

Creating Loan Account Action:

The screenshot shows the IBM Watson Assistant interface for creating a new action named 'loan'. The top navigation bar includes 'IBM Watson Assistant Lite', 'Upgrade', 'Banking Bot', and 'Learning center'. The left sidebar shows the 'loan' action selected. The main content area is divided into two panels. The left panel, titled 'Conversation steps', shows a sequence of steps: 1. 'What type of loan are you looking at?' with options 'Top-up loan', 'Student loan', and '+ 3'. 2. 'To be eligible for a house loan please contact our bank service providers with all existing loan detail...' with a 'Go to action: End' button. 3. 'Please approach the bank with following documents: 1. Pan Card 2. Aadhar Card 3. Passpor...' with a 'Go to action: End' button. The right panel, titled 'Customer starts with:', provides instructions on how to start the conversation and a list of phrases to use. The list includes 'loan'. A 'Preview' button is located at the bottom right.

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

loan

Customer starts with:
loan

Conversation steps

1 What type of loan are you looking at?
Top-up loan Student loan + 3
Continue to next step

1 is House loan
2 To be eligible for a house loan please contact our bank service providers with all existing loan detail...
Go to action: End

1 is Gold loan
3 Please approach the bank with following documents: 1. Pan Card 2. Aadhar Card 3. Passpor...
Go to action: End

1 is Top-up loan
To be eligible for a top-up loan please contact our...

New step +

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
Preview

Creating General Query Action:

The screenshot shows the IBM Watson Assistant interface for creating a General Query Action. The top navigation bar includes "IBM Watson Assistant Lite", "Upgrade", "Banking Bot", and "Learning center". The main header is "Query".

Customer starts with:
Query

Conversation steps

Select the general queries listed below

1 Find a nearest... Bank Workin... + 7
↓ Continue to next step

1 is Bank Working Days
2 The bank is open all days from Monday to Saturday from 9 am to 3 pm ,with exception of 2nd Saturdays.
Go to action: End

1 is List of Branches
3 6TH AVENUE ANNA NAGAR, A R M BRANCHCHENNAI, ADHIRAMAPURAM,...
Go to action: End

1 is Storage locker facility
Go to action: End

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

Query

Preview

Creating Net Banking Action:

The screenshot shows the IBM Watson Assistant interface for creating a Net Banking Action. The top navigation bar includes "IBM Watson Assistant Lite", "Upgrade", "Banking Bot", and "Learning center". The main header is "Net Banking".

Customer starts with:
Net Banking

Conversation steps

What queries do you have regarding net banking?

1 What is Net B... How do I regl... + 2
↓ Continue to next step

1 is What is Net Banking?
2 The facility offered by the bank allows customers to use banking services over the Internet. Customers...
Go to action: End

1 is How do I register for Net Banking ?
3 Please download and fill up the net banking requisition form and submit it to your home branch
Go to action: End

1 is What are the features of Net Banking?
4 Check the account statement online 2. Open...

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

Net Banking

Preview