Project Development Phase

Sprint 2

Date	09 November 2022
Team ID	PNT2022TMID22349
Project Name	AI Based Discourse for Banking Industry

Create Actions For Chatbot Assistant

Creation of Actions for Banking Chatbot Assistant:

To implement AI Based Discourse for Banking Industry, we need an IBM Service.

The Service used is **IBM WATSON ASSISTANT.**

ACTION CREATED
1)SAVING ACCOUNT ACTION
2)CURRENT ACCOUNT ACTION
3)LOAN ACCOUNT ACTION
4)GENERAL QUERY ACTION
5)NET BANKING ACTION

Screenshot 1

IBM Watson Service Page | IBM Watson Assistant | IBM

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F7c0eb589a18846ebaf0860ef9363b8c...

IBM Watson Assistant Lite   Upgrade   Banking ChatBot ∨

Learning center

Actions

Actions ∧
- **Created by you**
- Set by assistant

Variables ∧
- Created by you
- Set by assistant
- Set by integration

Saved responses

New action +

Name	Last edited	Examples Count	Status
Savings	2 hours ago	2	
Index	39 minutes ago	1	
End	a day ago	1	
Greeting	a few seconds ago	9	
Current	2 hours ago	2	
Loan	42 minutes ago	1	
NetBanking	22 minutes ago	1	
General Query	4 minutes ago	3	

Items per page: 50   Showing 1–8 of 8 actions

Preview

go to Savings

Savings Account is an account where you can deposit a part of your income as savings.

Which type of savings account do you want to create?

Select an option ∧

- Regular Savings Account
- Zero Balance Savings Account
- Women's Savings Account
- Senior Citizen's Savings Accou...
- Family Savings Account

Type something...

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Screenshot 2

IBM Watson Service Page | IBM Watson Assistant | IBM

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F7c0eb589a18846ebaf0860ef9363b8c...

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Items per page: 50   Showing 1–8 of 8 actions

Preview

Ways of Opening Regular Savings Account

- **VISITING BRANCH**
  - **ONLINE OPENING THROUGH KYC DOCUMENTS**

DOCUMENTS REQUIRED:

- Passport,
  - Driving Licence,
  - Proof of possession of Aadhaar Number,
  - Voter's Identity Card issued by Election Commission of India,
  - Job card issued by NREGA duly signed by an officer of the State Government,
  - Letter issued by the National Population Register containing details of name and address.

go to End

Do you want to know some other services?

Type something...

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IBM Watson Assistant Lite   Upgrade   Banking ChatBot ⌄   Learning center ⊙ 👤

🏠 Actions   ⚙

Actions   ⌃   🔍 ⤒   New action +
  Created by you
  Set by assistant   Name   Last edited   Examples Count   Status
Variables   ⌃
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Saved responses   Greeting   a few seconds ago 9
                                 Current   2 hours ago   2
                                 Loan   42 minutes ago   1
                                 NetBanking   22 minutes ago   1
                                 General Query   4 minutes ago   3

Preview   🔁 —

You are eligible to open Max Advantage Current Account if you fall under any of the following categories:

- Resident Individual
    - Sole Proprietorship Firms
    - Partnership Firms
    - Limited Liability Partnership Firms
    - Private and Public Limited Companies

What are the documents required for opening a Current Account of a sole proprietorship firm?
Category A (government issued documents) License / registration certificate issued, in the name of the entity, by / under:

- Municipal authorities such as Shop & Establishment certificate / Trade License,
- Registering authority in the name of practicing firm like Certificate of Practice issued by Institute of Chartered Accountants of India, Institute of Cost Accountants of India and Institute of Company Secretaries of India,

Items per page: 50 ⌄   Showing 1–8 of 8 actions

Type something...   ▷

IBM Watson Assistant Lite   Upgrade   Banking ChatBot ⌄   Learning center ⊙ 👤

🏠 Actions   ⚙

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                                 Current   2 hours ago   2
                                 Loan   42 minutes ago   1
                                 NetBanking   22 minutes ago   1
                                 General Query   4 minutes ago   3

Preview   🔁 —

and certain tax benefits can also be availed on some of these types of Personal Loans.

Travel Loan   Travel Loan

All You Need To Know

Features:

Instant funds: For pre-approved Bank customers, funds under a travel loan are made available almost instantly. Meanwhile, non-HDFC Bank customers can get funds in less than 4 hours.

Pocket-friendly EMIs and flexible tenure: You can get a Personal Loan for travel with pocket-friendly EMIs, flexible repayment option and loan tenures of up to 60 months. You can repay the loan via cheque, online transfer, cash or Credit Card.

Hassle-free application process: Minimal or no documentation is involved in the process of getting an Bank Personal Loan for travel

Items per page: 50 ⌄   Showing 1–8 of 8 actions

Type something...   ▷

IBM Watson Service Page   ×   IBM Watson Assistant   ×   IBM   ×   +

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Items per page: 50 ∨   Showing 1–8 of 8 actions

Preview

Net Banking

go to NetBanking

What is Net Banking?

Net banking is also referred to as internet banking. It is an electronic system provided by banks to their customers that allows them to access financial and non-financial banking services in minutes. The net banking system eliminates the need to physically visit the bank. Net banking allows customers to easily access a variety of banking services such as money transfers, the creation of FDs and RDs, the tracking of transactions, and so on.

Any customer who has an active bank account with the bank can use internet banking or net banking. In order to use net banking, a customer must first register. After registering, he or she will be able to use the online banking services.

Select an option

Type something...

IBM Watson Service Page   ×   IBM Watson Assistant   ×   IBM   ×   +

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Preview

Benefits

Benefits

Some of the most prominent advantages of internet banking include the following:

- With internet banking, you can transfer money from one account to another. You can initiate inter and intrabank fund transfers, domestically and internationally. You can send funds to beneficiaries within an hour using money transfer channels like NEFT, RTGS, and IMPS.
- Another benefit of internet banking is that you can conveniently open fixed and recurring deposit accounts online. You can choose your preferred deposit type (cumulative or non-cumulative), amount, and investment term.
- You can pay utility bills like electricity, telephone, gas, etc., from the comfort of your home and enable auto-debit options never to miss a payment. You

Type something...

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F7c0eb589a18846ebaf0860ef9363b8c...

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Index

Customer starts with:
Index

Conversation steps

1   5   is   General Query
This step has no content
↳ Go to action: **General Query**

2   This step has no content
↓ Continue to next step

3   5   is   Net Banking
This step has no content
↳ Go to action: **NetBanking**

4   5   is   Loan Account
This step has no content
↳ Go to action: **Loan**

5   How can I help you?
Loan Account   General Query   + 3
↓ Continue to next step

New step   +

Step 2 is taken   without conditions ⌄   fx

Assistant says

B   I   ⌗   ⚏   ♫   ▷   ▣   </>

For example: What size do you want to order?

⤷ Define customer response   ⌄

And then

↓ Continue to next step   ⌄

Preview

Kyc Documents

AADHAR CARD

PAN CARD

VOTER ID

DRIVING LICENSE

go to **End**

Do you want to know some other services?

Yes   No

No

Thank you. Have a nice day!!!

⊕ There are no additional steps for this action.
Add a new step or end the action.

Greeting ended

Type something...

Type here to search   27°C Cloudy   ENG   21:07   04-11-2022