

ProjectDevelopmentPhase Deliveryof Sprint -3

Date	01November2022
TeamID	PNT2022TMID37257
ProjectName	AI-based discourse for Banking Industry

Creating Want to take Loan Action

Loan action is created with the necessary steps.

The screenshot shows the IBM Watson Assistant interface for creating a 'Want to take loan' action. The interface is divided into two main panels: 'Conversation steps' on the left and 'Assistant says' on the right.

Conversation steps:

- Step 1:** 'What type of loan would you like to get?' with options 'House loan' and 'Vehicle loan'. It includes a 'Continue to next step' button and a 'New step' button.
- Step 2:** 'How much money do you need?' with a 'Currency' input field. It includes a 'Continue to next step' button.
- Step 3:** 'How will you use the money?' with a 'Free text' input field. It includes a 'Continue to next step' button.

Assistant says:

- Step 1 is taken:** 'without conditions'.
- Assistant says:** 'What type of loan would you like to get?' with a 'Choose an option' dropdown.
- And then:** 'Continue to next step'.

The interface also includes a 'Preview' button at the bottom right.

Creating Queries regarding loan Action

General query action is created with the necessary steps.

The screenshot shows the IBM Watson Assistant interface for creating a 'Queries regarding loan' action. The interface is divided into two main panels: 'Conversation steps' on the left and 'Assistant says' on the right.

Conversation steps:

- Step 1:** 'What Query do you have?' with options 'Business loan' and 'Home loan'. It includes a 'Continue to next step' button and a 'New step' button.
- Step 2:** 'Select options related to your Home loan query.' with options 'What can I d...' and 'What is the p...'. It includes a 'Continue to next step' button.
- Step 3:** 'What is the best age for Home loan?' with a 'Confirmation' input field. It includes a 'Continue to next step' button.

Assistant says:

- Step 1 is taken:** 'without conditions'.
- Assistant says:** 'What Query do you have?' with a 'Home loan' button and a 'Business loan' button.
- And then:** 'Continue to next step'.

The interface also includes a 'Preview' button at the bottom right.

Creating See how I can help you Action

Net banking action is created with the necessary steps.

The screenshot shows the IBM Watson Assistant interface for configuring the 'See how I can help you' action. The top bar includes 'IBM Watson Assistant Life', 'Upgrade', 'Chatbot', and 'Learning center'. The main area is divided into a left sidebar and a main workspace.

Left Sidebar:

- Customer starts with:** See how I can help you
- Conversation steps:**
 - Step 1: Questions to ask a Banker: (Personal Ban..., Commercial...). Action: Continue to next step.
 - Step 2: 1 is Personal Banking. Select the options. (When should..., Do I need a P..., +3). Action: Continue to next step.
 - Step 3: 2 is Should I have more t... Yes, you should strive to have more than one bank account! However, the question lies in how... (Confirmation). Action: Continue to next step.
- New step** (+)

Main Workspace:

- Step 1 is taken** without conditions
- Assistant says:** Questions to ask a Banker: (Personal Banking, Commercial Banking). Includes 'Edit response' and 'Edit validation' buttons.
- And then:** Continue to next step
- Preview** button

In addition to this greeting, end greeting, index and end actions are also created.

Actions

The screenshot shows the 'Actions' page in the IBM Watson Assistant interface. The left sidebar has a search icon and a 'New action' button. The main area displays a table of actions.

Name	Last edited	Examples Count	Status	
See how I can help you	2 hours ago	1	✓	:
Queries regarding loan	2 hours ago	1	✓	:
Want to take loan	2 hours ago	1	✓	:

Items per page: 50 Showing 1-3 of 3 actions 1 1 of 1 pages

Preview button

PREVIEW OF CHATBOT:

<https://web-chat.global.assistant.watson.appdomain.cloud/preview.html?backgroundImageURL=https%3A%2F%2Fus-south.assistant.watson.cloud.ibm.com%2Fpublic%2Fimages%2Fupx-938f0cce-9f65-4e00-bee6-3c52700a398d%3A%3Add85a931-9450-4ba7-8378-a88f54e7fae7&integrationID=5134bf41-57bd-4c92-8bc0-598a18abeb3b®ion=us-south&serviceInstanceID=938f0cce-9f65-4e00-bee6-3c52700a398d>



**NOTE: SINCE NO CODES WERE USED IN CREATING LOAN ACCOUNT ACTION.
SCREENSHOTS OF EACH STEPS IS BEEN MENTIONED WITH APPROPRIATE
SCREENSHOTS.**