

## Project Development Phase

### Sprint 2

Date	13 November 2022
Team ID	Sananda , Nivetha , Priya , Santhya
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**.

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

IBM Watson Assistant LiteUpgradeBanking ChatBot

Learning center

Actions

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

Name	Last edited	Examples Count	Status
Savings	2 hours ago	2	
Index	35 minutes ago	1	
End	a day ago	1	
Greeting	6 days ago	4	
Current	an hour ago	2	
Loan	38 minutes ago	1	
NetBanking	18 minutes ago	1	
General Query	in a few seconds	3	

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

11 of 1 pages

Preview

IBM Watson Assistant LiteUpgradeBanking ChatBot

Learning center

Actions

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

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: 50Showing 1-8 of 8 actions

Preview

How can I assist you?

Greeting recognized

Good to see you.

go to [Index](#)

How can I help you?

Select an option

Savings Account

Current Account

Loan Account

NetBanking

General Query

Type something...

IBM Watson Assistant

Life

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

Name	Last edited	Examples Count
Savings	7 days ago	1
Index	3 days ago	1
Loan	5 days ago	1
Query	3 days ago	1
Greeting	7 days ago	4
End	6 days ago	1
Net Banking	3 days ago	1
Current	5 days ago	2

Items per page: 50

Showing 1–8 of 8 actions

Preview

current account

current account

go to Current

What's your company type?

Proprietorship Partnership

Proprietorship

Please take the following document and approach the closest branch.  
1)Income tax returns of the proprietor for the last 3 years.  
2)Company's agreement  
3)Pan card

Use the up arrow for prior messages

IBM Watson Assistant

Life

Upgrade

Banking chatBot

Learning center

Loan

Customer starts with:

Loan

6 total steps

0 end steps

0 re-ask steps

Conversation steps

What type of loan are you looking for?

1 is Student loan Vehicle loan + 3

Continue to next step

1 is House loan

To be eligible for house loan please contact our bank service providers with all existing loan details.

2 Free text

Go to action: End

1 is Gold loan

kindly approach the bank with the following document. 1)Pan card 2)Aadhar card 3)Passport...

3

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

IBM Watson Assistant LiteUpgradeBanking chatBot

Learning center

Actions

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

Name	Last edited	Examples Count
Savings	7 days ago	1
Index	3 days ago	1
Loan	5 days ago	1
Query	3 days ago	1
Greeting	7 days ago	4
End	6 days ago	1
Net Banking	3 days ago	1
Current	5 days ago	2

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

Preview

Greeting recognized

Good to see you!

go to Index

How can I help you?

Select an option

Savings account

current account

loan enquiry

net banking

general queries

Use the up arrow for prior messages

IBM Watson Assistant LiteUpgradeBanking chatBot

Learning center

Actions

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

Name	Last edited	Examples Count
Savings	7 days ago	1
Index	3 days ago	1
Loan	5 days ago	1
Query	3 days ago	1
Greeting	7 days ago	4
End	6 days ago	1
Net Banking	3 days ago	1
Current	5 days ago	2

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

Preview

loan enquiry

go to Loan

What type of loan are you looking for?

Select an option

House loan

Gold loan

Topup loan

Vehicle loan

Student loan

Type something...

IBM Watson Assistant

Life

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

Name	Last edited	Examples Count
Savings	7 days ago	1
Index	3 days ago	1
Loan	5 days ago	1
Query	3 days ago	1
Greeting	7 days ago	4
End	6 days ago	1
Net Banking	3 days ago	1
Current	5 days ago	2

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

Preview

Gold loan

Gold loan

kindly approach the bank with the following document.  
1)Pan card  
2)Aadhar card  
3)Passport size photo

thanks

go to [End](#)

Do you want to know about some other service?

yes no

Type something...

IBM Watson Assistant

Life

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

Name	Last edited	Examples Count
Savings	7 days ago	1
Index	3 days ago	1
Loan	5 days ago	1
Query	3 days ago	1
Greeting	7 days ago	4
End	6 days ago	1
Net Banking	3 days ago	1
Current	5 days ago	2

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

Preview

loan enquiry

loan enquiry

go to [Loan](#)

What type of loan are you looking for?

Topup loan

Topup loan

To be eligible for topup loan please contact our bank service providers with existing loan details.

Use the up arrow for prior messages

IBM Watson Assistant LifeUpgradeBanking chatBot

Learning center

Index

2

This step has no content

Go to action: Query

5

is

net banking

3

This step has no content

Go to action: Net Banking

5

is

loan enquiry

4

This step has no content

Go to action: Loan

How can I help you?

loan enquiry

Savings acco...

+ 3

Continue to next step

5

is

Savings account

6

This step has no content

Go to action: Savings

New step

Step 4 is taken

with conditions

f

Conditions

1 condition

If

All

of this is true:

5. How can I help yo...

is

loan enquiry

x

and

Add condition

New condition group

Assistant says

B

I

For example: What size do you want to order?

Define customer response

Preview