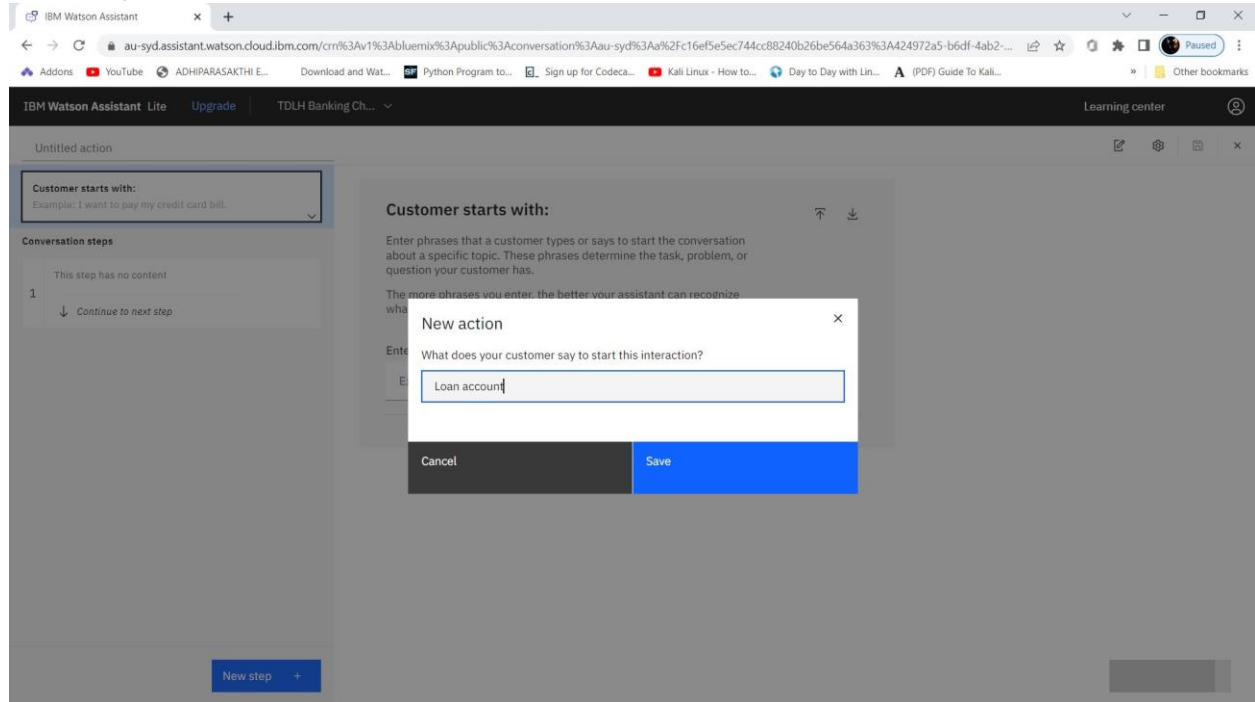


Project Development Phase

Delivery of Sprint - 2

Date	15 OCT 2022
Team ID	PNT2022TMID06493
Project Name	AI-based discourse for Banking Industry

Creating Loan account action



IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/cm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fc16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-...

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Loan account

Customer starts with:
Loan account

Conversation steps
1 This step has no content
Continue to next step

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
Loan
Loan account

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/cm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fc16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-...

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Loan account

Customer starts with:
Loan account

Conversation steps
1 Which type of loan are you looking at?
House loan Gold loan +3
Continue to next step

New step +

Step 1 is taken without conditions

Assistant says
Which type of loan are you looking at?
Choose an option
Edit response Edit validation
And then
Continue to next step

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Loan account

Customer starts with: Loan account

Conversation steps

1 Which type of loan are you looking at? House loan Gold loan +3

Continue to next step

1 is House loan

2 To be eligible for a house loan please contact out bank service provides with all existing loan details

Go to action: End

New step +

Step 2 is taken with conditions

Conditions 1 condition

If All of this is true:

1. Which type of loa... is House loan

and Add condition +

New condition group +

Assistant says

To be eligible for a house loan please contact out bank service provides with all existing loan details

Define customer response

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Loan account

Customer starts with: Loan account

Conversation steps

1 Which type of loan are you looking at? House loan Gold loan +3

Continue to next step

1 is House loan

2 To be eligible for a house loan please contact out bank service provides with all existing loan details

Go to action: End

1 is Gold loan

3 Please approach the bank with the following documents. 1)Pan card 2)Aadhar card 3)Passport Siz...

Go to action: End

New step +

Step 3 is taken with conditions

Conditions 1 condition

If All of this is true:

1. Which type of loa... 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

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/cm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fc16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-...

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Loan account

Conversation steps

- Which type of loan are you looking at?
1 is House loan Gold loan +3
Continue to next step
- 1 is House loan
To be eligible for a house loan please contact out bank service provides with all existing loan details
Go to action: End
- 1 is Gold loan
Please approach the bank with the following documents. 1)Pan card 2)Aadhar card 3)Passport...
Go to action: End
- 1 is Topop loan
To be eligible for a top-up load please contact out bank service provides with all existing load details
Go to action: End

New step +

Step 4 is taken with conditions

Conditions

1 condition

If All of this is true:

1. Which type of loa... is Topop loan

and Add condition +

New condition group +

Assistant says

To be eligible for a top-up load please contact out bank service provides with all existing load details

Define customer response

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/cm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fc16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-...

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Loan account

Conversation steps

- 1 is House loan
To be eligible for a house loan please contact out bank service provides with all existing loan details
Go to action: End
- 1 is Gold loan
Please approach the bank with the following documents. 1)Pan card 2)Aadhar card 3)Passport...
Go to action: End
- 1 is Topop loan
To be eligible for a top-up load please contact out bank service provides with all existing load details
Go to action: End
- 1 is Vehicle loan
Please approach the bank with the following documents. 1)Automobile Invoice 2)Pan card...
Go to action: End

New step +

Step 5 is taken with conditions

Conditions

1 condition

If All of this is true:

1. Which type of loa... is Vehicle loan

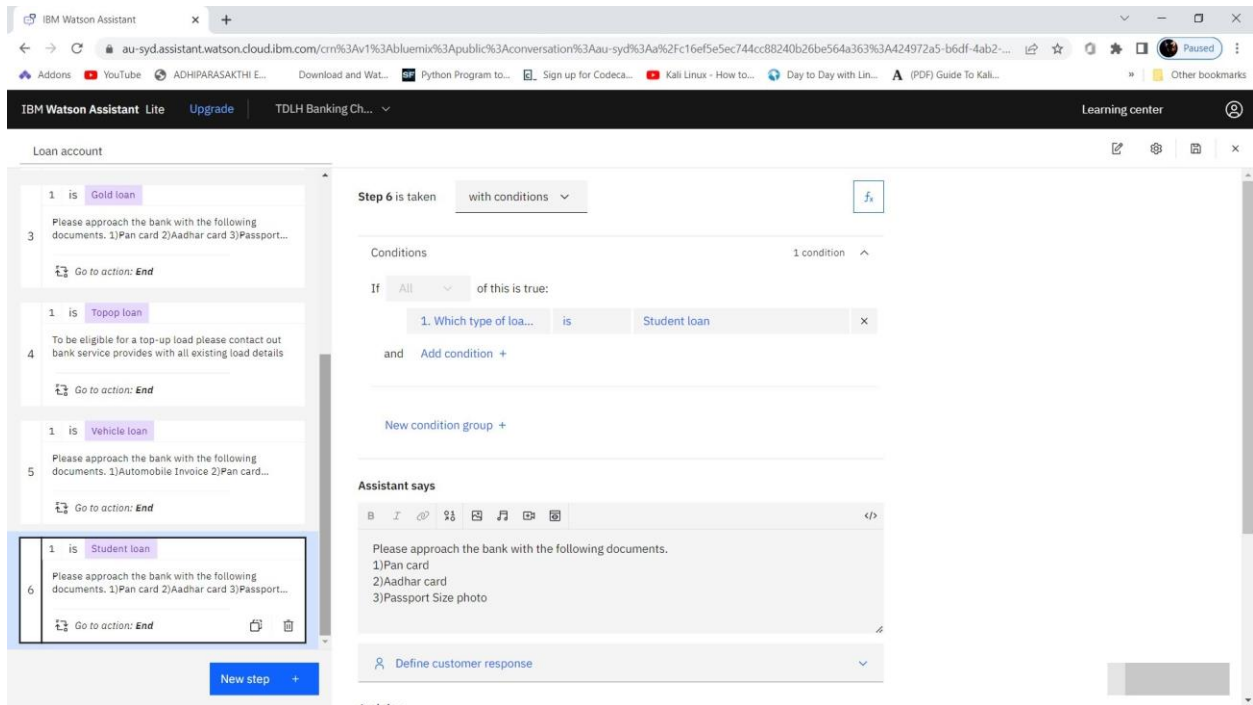
and Add condition +

New condition group +

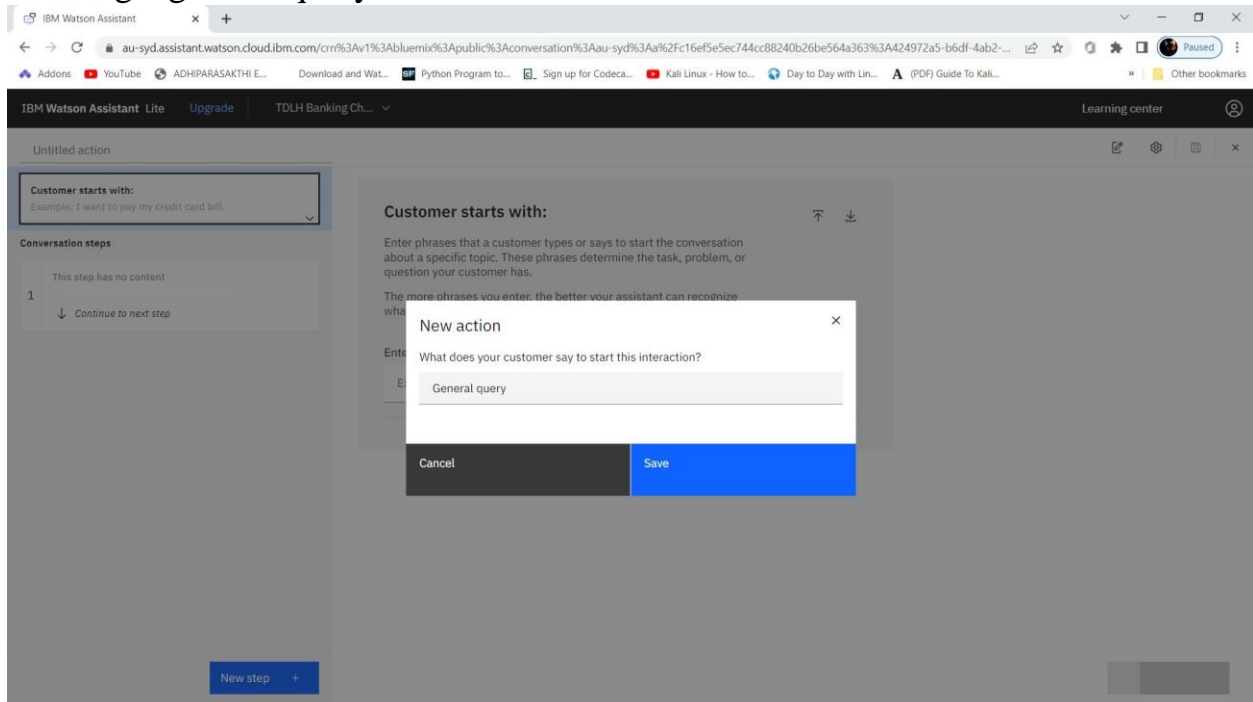
Assistant says

Please 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



Creating a general query action



IBM Watson Assistant

general query

Customer starts with:
General query

Conversation steps

1 Select the general queries listed below.
Bank Workin... List of Branc... +4
Continue to next step

Step 1 is taken without conditions

Assistant says

Select the general queries listed below.

Choose an option

Edit response Edit validation

And then

Continue to next step

New step

IBM Watson Assistant

general query

Customer starts with:
General query

Conversation steps

1 Select the general queries listed below.
Bank Workin... List of Branc... +4
Continue to next step

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

Step 2 is taken with conditions

Conditions 1 condition

If All of this is true:

1. Select the genera... is Bank Working Days

and Add condition +

New condition group +

Assistant says

The bank is open all days from Monday to Saturday from 9 am to 3pm, with exception of 2nd Saturdays

Define customer response

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

general query

Customer starts with: General query

Conversation steps

1 Select the general queries listed below. Bank Workin... List of Branc... + 4

Continue to next step

1 is Bank Working Days

The bank is open all days from Monday to Saturday from 9 am to 3pm, with exception of 2nd Saturdays

Go to action: End

3 1 is List of Branches

- adyar - alagapuram - alangudi - alappatti - ambattur - anaiyur - anna nagar (chennai) - annanagar - ...

Go to action: End

New step +

Step 3 is taken with conditions

Conditions 1 condition

If All of this is true:

1. Select the genera... is List of Branches

and Add condition +

New condition group +

Assistant says

- arepalayam
- ariyalur
- ariyamangalam
- arumbakkam
- arumbavur
- avadi
- avinashi branch
- b.odaiyur
- bharathiar university
- boochi atthipedu

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

general query

Conversation steps

1 Select the general queries listed below. Bank Workin... List of Branc... + 4

Continue to next step

1 is Bank Working Days

The bank is open all days from Monday to Saturday from 9 am to 3pm, with exception of 2nd Saturdays

Go to action: End

1 is List of Branches

- alagapuram - adyar - alangudi - alappatti - ambattur - anaiyur - anna nagar (chennai) - ...

Go to action: End

4 1 is Storage Locker Facility

- alagapuram - adyar - alangudi - alappatti - ambattur - anaiyur - anna nagar (chennai) - ...

Go to action: End

New step +

Step 4 is taken with conditions

Conditions 1 condition

If All of this is true:

1. Select the genera... is Storage Locker Facility

and Add condition +

New condition group +

Assistant says

- alagapuram
- adyar
- alangudi
- alappatti
- ambattur
- anaiyur
- anna nagar (chennai)
- annanagar
- arepalayam

IBM Watson Assistant

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IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

general query

1 is Bank Working Days

The bank is open all days from Monday to Saturday from 9 am to 3pm, with exception of 2nd Saturdays

Go to action: End

1 is List of Branches

- alagapuram - adyar - alangudi - alappatti - ambattur - anaiyur - anna nagar (chennai) - ...

Go to action: End

1 is Storage Locker Facility

- alagapuram - adyar - alangudi - alappatti - ambattur - anaiyur - anna nagar (chennai) - ...

Go to action: End

1 is Currency Conversion Facility

All our bank Branchers have a forex Exchange facility.

Go to action: End

New step +

Step 5 is taken with conditions

Conditions

1 condition

If All of this is true:

1. Select the genera... is Currency Conversion Facility

and Add condition +

New condition group +

Assistant says

All our bank Branchers have a forex Exchange facility.

Define customer response

IBM Watson Assistant

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IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

general query

1 is List of Branches

- alagapuram - adyar - alangudi - alappatti - ambattur - anaiyur - anna nagar (chennai) - ...

Go to action: End

1 is Storage Locker Facility

- alagapuram - adyar - alangudi - alappatti - ambattur - anaiyur - anna nagar (chennai) - ...

Go to action: End

1 is Currency Conversion Facility

All our bank Branchers have a forex Exchange facility.

Go to action: End

1 is CIBIL

CIBIL Score is a 3-digit numeric summary of your credit history, rating and report, and ranges from...

Go to action: End

New step +

Step 6 is taken with conditions

Conditions

1 condition

If All of this is true:

1. Select the genera... is CIBIL

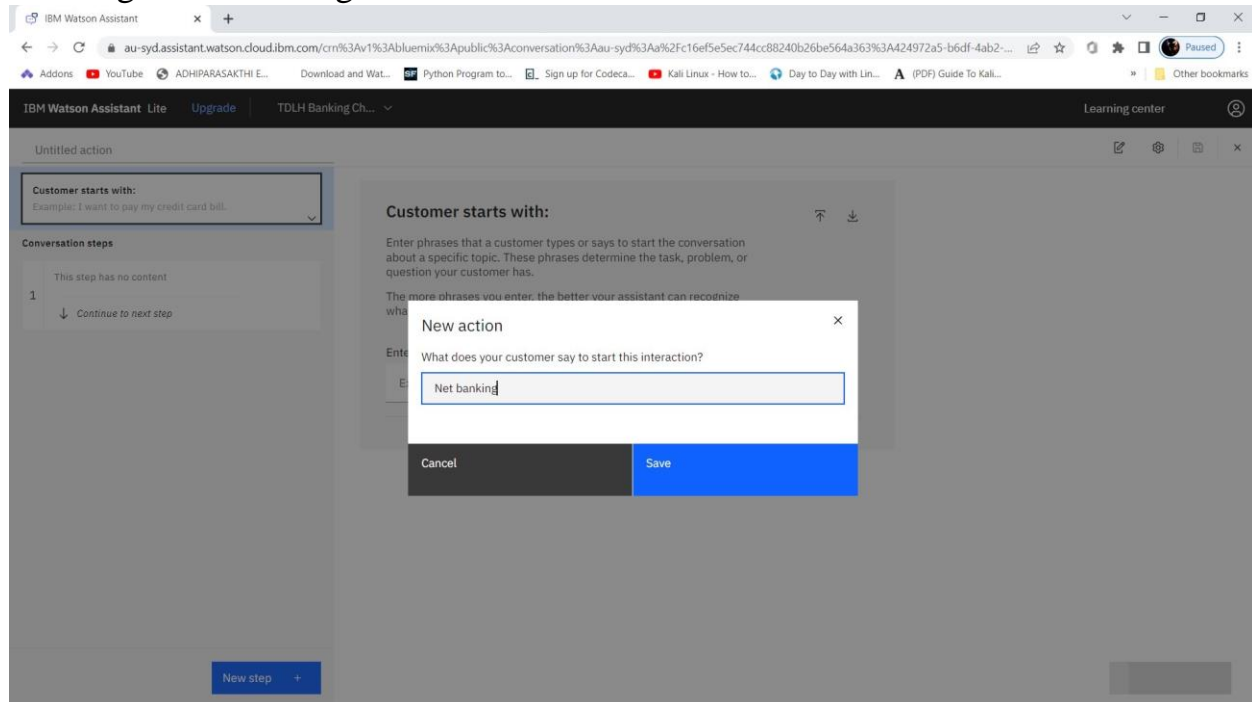
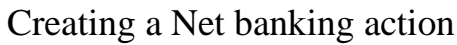
and Add condition +

New condition group +

Assistant says

CIBIL Score is a 3-digit numeric summary of your credit history, rating and report, and ranges from 300 to 900. The closer your score is to 900, the better your credit rating is.

Define customer response



IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/cm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fc16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-...

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Net banking

Customer starts with:
Net banking

Conversation steps

1 What queries do you have regarding Netbanking?
What is Net B... How do I regi... +2
Continue to next step

Step 1 is taken without conditions

Assistant says

What queries do you have regarding Netbanking?

What is Net Banking? How do I register for Net Banking? What are the features of Net Banking?
Facing errors in Net Banking

Edit response Edit validation

And then
Continue to next step

New step +

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/cm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fc16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-...

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Net banking

Customer starts with:
Net banking

Conversation steps

1 What queries do you have regarding Netbanking?
What is Net B... How do I regi... +2
Continue to next step

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

Conditions 1 condition

If All of this is true:
1. What queries do ... is What is Net Banking?
and Add condition +
New condition group +

Assistant says

The facility offered by the bank allows customers to use banking services over the internet. Customers need not visit their bank's branch office to avail each and every small service

Define customer response

And then
Go to another action

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Net banking

Customer starts with: Net banking

Conversation steps

1 What queries do you have regarding Netbanking? What is Net B... How do I regi... + 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 ne...

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

New step +

Step 3 is taken with conditions

Conditions 1 condition

If All of this is true:

1. What queries do ... is How do I register for Net Banking?

and Add condition +

New condition group +

Assistant says

Please download and fill up the net banking requisition form and submit it to your home branch.

Define customer response

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Net banking

Conversation steps

1 What queries do you have regarding Netbanking? What is Net B... How do I regi... + 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 ne...

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 Account Balances & Statements. You can log into the internet banking account to check your...

Go to action: End

New step +

Step 4 is taken with conditions

Conditions 1 condition

If All of this is true:

1. What queries do ... is What are the features of Net Bankin...

and Add condition +

New condition group +

Assistant says

- Check Account Balances & Statements. You can log into the internet banking account to check your account balance at any time. ...
- 24x7 Fund Transfer. ...
- Bill Payments & Recharge. ...
- Order Cheque Books & Cards. ...
- Open deposit accounts. ...
- Apply for Loans. ...
- Make Investments. ...
- Security.

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fc16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-...

IBM Watson Assistant Lite Upgrade TDLH Banking Ch... Learning center

Net banking

1 is What is Net Banking?
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?
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?
- Check Account Balances & Statements. You can log into the internet banking account to check your...
Go to action: End

1 is Facing errors in Net Banking
Please contact our customer care executive or approach the closest branch
Go to action: End

New step +

Step 5 is taken with conditions

Conditions 1 condition

If All of this is true:

1. What queries do ... is Facing errors in Net Banking

and Add condition +

New condition group +

Assistant says

Please contact our customer care executive or approach the closest branch

Define customer response

End

IBM Watson Assistant

au-syd.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2Fc16ef5e5ec744cc88240b26be564a363%3A424972a5-b6df-4ab2-...

IBM Watson Assistant Lite Upgrade Banking BOT Learning center

End

Customer starts with: End

Conversation steps

Do you want to know about some other services?
1 is Yes No
Continue to next step

1 is Yes
This step has no content
Go to action: Index

1 is No
Thank you Have a nice day
Continue to next step

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

End

Preview

IBM Watson Assistant Lite Upgrade Banking BOT Learning center

End

Customer starts with: End

Conversation steps

- 1 Do you want to know about some other services? No Yes
Continue to next step
- 1 is Yes
This step has no content
Go to action: Index
- 1 is No
Thank you Have a nice day
Continue to next step

New step +

Step 1 is taken without conditions

Assistant says

Do you want to know about some other services?

Yes No

Edit response Edit validation

And then

Continue to next step

Preview

IBM Watson Assistant Lite Upgrade Banking BOT Learning center

End

Customer starts with: End

Conversation steps

- 1 Do you want to know about some other services? No Yes
Continue to next step
- 1 is Yes
This step has no content
Go to action: Index
- 1 is No
Thank you Have a nice day
Continue to next step

New step +

Step 2 is taken with conditions

Conditions

1 condition

If All of this is true:

1. Do you want to kn... is Yes

and Add condition +

New condition group +

Assistant says

For example: Please select from the following options:

Define customer response

Preview

IBM Watson Assistant interface showing a conversation flow for a banking bot. The flow is titled "End" and includes a "Customer starts with" section and a "Conversation steps" section.

Customer starts with: End

Conversation steps:

- Step 1: Do you want to know about some other services? (Buttons: No, Yes)
- Step 2: This step has no content. (Action: Go to action: Index)
- Step 3: Thank you Have a nice day. (Action: Continue to next step)

Step 3 is taken with conditions

Conditions: 1 condition

If All of this is true:

- 1. Do you want to kn... is No

and Add condition +

Assistant says:

Thank you Have a nice day

Define customer response

Preview

End greeting

IBM Watson Assistant interface showing a conversation flow for a banking bot. The flow is titled "End greeting" and includes a "Customer starts with" section and a "Conversation steps" section.

Customer starts with: End greeting

Conversation steps:

- Step 1: Dear customer for your valuable time spending our website. (Action: Action complete)

Step 1 is taken without conditions

Assistant says:

Dear customer for your valuable time spending our website

Define customer response

And then:

- End the action

New step +

Index to add