

Project Development Phase Delivery of Sprint-2

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PROJECT NAME	AI based discourse for Banking Industry

Creating Skills & Assistant For Chatbot:

4. Creating Loan Account Action

The screenshot displays the IBM Watson Assistant interface for configuring a 'Loan' skill. The 'Conversation steps' list on the left shows a sequence of steps for handling loan queries. The 'Assistant says' section shows the initial prompt 'What type of loan are you looking for?' and a 'Choose an option' button. The 'Preview' window on the right shows the chatbot's response with a list of loan options: House Loan, Gold Loan, Topup Loan, Student Loan, and Vehicle Loan.

Loan Account Action

The screenshot displays the IBM Watson Assistant interface for configuring a 'Loan Account Action' skill. The 'Conversation steps' list on the left shows a sequence of steps for handling loan account actions. The 'Assistant says' section shows the prompt 'To be eligible for house loan, please contact our Bank service providers with all existing loan details'. The 'Preview' window on the right shows the chatbot's response with a list of loan options and a 'House Loan' button.

House Loan

The screenshot displays the IBM Watson Assistant configuration interface for a 'Student Loan' action. The sidebar on the left shows a sequence of steps, with Step 6 (Student Loan) currently selected. The main configuration area shows 'Step 6 is taken' with conditions set to 'All of this is true: 1. What type of loan... is Student Loan'. The 'Assistant says' section contains a list of required documents: PAN Card, Passport size photos, and Acceptance Letter from Institution. The preview window on the right shows a chat flow where the user asks 'What type of loan are you looking for?', the assistant responds with 'Student Loan', and then provides the list of documents.

Student Loan

5. Creating General Query Action

The screenshot displays the IBM Watson Assistant configuration interface for a 'General Query' action. The sidebar on the left shows a sequence of steps, with Step 1 (General Queries) currently selected. The main configuration area shows 'Step 1 is taken' without conditions. The 'Assistant says' section contains the text 'Please select the general queries listed below:'. The preview window on the right shows a chat flow where the user asks 'What type of loan are you looking for?', the assistant responds with 'Student Loan', and then provides the list of documents.

General Query Action

IBM Watson Assistant interface showing the configuration for a General Query named "Bank Working Days".

Conversation steps:

1. Please select the general queries listed below:
 - Bank Workin... CIBIL +4
2. The Bank is open all days from Monday to Saturday from 9AM to 5 PM.
 - Go to action: End
3. ABHIRAMAPURAM ADITHANAR SALAI ADYAR ALWARPET AMINJIKARAI ANAKAPUTHUR...
 - Go to action: End
4. Storage Locker Facility
 - ABHIRAMAPURAM ADITHANAR SALAI ADYAR

Conditions:

If All of this is true:

- 1. Please select the ... is Bank Working Days

Assistant says:

The Bank is open all days from Monday to Saturday from 9AM to 5 PM.

Preview:

General Query

go to Query

Please select the general queries listed below:

Bank Working Days

Bank Working Days

The Bank is open all days from Monday to Saturday from 9AM to 5 PM.

go to End

Do you want to know other services?

Yes No

Use the up arrow for prior messages

General Query - Bank Working Days

IBM Watson Assistant interface showing the configuration for a General Query named "List of Branches".

Conversation steps:

1. Bank Workin... CIBIL +4
 - Continue to next step
2. The Bank is open all days from Monday to Saturday from 9AM to 5 PM.
 - Go to action: End
3. ABHIRAMAPURAM ADITHANAR SALAI ADYAR ALWARPET AMINJIKARAI ANAKAPUTHUR...
 - Go to action: End
4. Storage Locker Facility
 - ABHIRAMAPURAM ADITHANAR SALAI ADYAR AMINJIKARAI ANAKAPUTHUR ANNANAGAR ANNA...
5. CIBIL
 - The Credit Information Bureau (India) Limited (CIBIL) is the most popular of the four credit

Conditions:

If All of this is true:

- 1. Please select the ... is List of Branches

Assistant says:

ABHIRAMAPURAM
ADITHANAR SALAI
ADYAR
ALWARPET
AMINJIKARAI
ANAKAPUTHUR
ANNANAGAR
ANNA NAGAR WEST
ANNA SALAI
ARUMBakkam

Preview:

CHENNAI V PURAM COLONY
CHETPUT
CHITLAPAKKAM
CHOOlAIMEDU
CLOCK TOWER
CMDA

VADAPALANI
VANAGARAM
VELACHERY
VILLIVAKKAM
VIVEKANANDA NAGAR
WASHERMANPET
WEST MAMBALAM
SAIDAPET

are the list of Branches

go to End

Do you want to know other services?

Yes No

Use the up arrow for prior messages

General Query - List of Branches

IBM Watson Assistant Lite Upgrade Banking Bot

Query

1 is List of Branches

3 ABHIRAMAPURAM ADITHANAR SALAI ADYAR
ALWARPET AMINIKARAI ANAKAPUTHUR...

Go to action: End

1 is Storage Locker Facility

4 ABHIRAMAPURAM ADITHANAR SALAI ADYAR
AMINIKARAI ANAKAPUTHUR ANNANAGAR ANNA...

Go to action: End

1 is CIBIL

5 The Credit Information Bureau (India) Limited (CIBIL) is the most popular of the four credit...

Go to action: End

1 is Find the nearest Branch

6 Please reach out to our customer care executive.

Go to action: End

New step +

Step 5 is taken with conditions

Conditions

If All of this is true:

1. Please select the ... is CIBIL

and Add condition +

New condition group +

Assistant says

The Credit Information Bureau (India) Limited (CIBIL) is the most popular of the four credit information companies licensed by Reserve Bank of India. 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. A credit history is a record of a borrower's repayment of debts. A credit report is a record of the borrower's credit history from a number of sources, including banks, credit card companies, collection agencies, and governments. A borrower's credit score is the result of a mathematical algorithm applied to credit information to predict how credit worthy you are. The CIBIL score plays a critical role in the loan application process. When someone approaches a bank or a financial institution for a loan, the lender first checks the applicant's

Preview

CIBIL

The Credit Information Bureau (India) Limited (CIBIL) is the most popular of the four credit information companies licensed by Reserve Bank of India.

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. A credit history is a record of a borrower's repayment of debts. A credit report is a record of the borrower's credit history from a number of sources, including banks, credit card companies, collection agencies, and governments. A borrower's credit score is the result of a mathematical algorithm applied to credit information to predict how credit worthy you are.

The CIBIL score plays a critical role in the loan application process. When someone approaches a bank or a financial institution for a loan, the lender first checks the applicant's

Type something...

1:14 PM 14-Nov-22

General Query - CIBIL

IBM Watson Assistant Lite Upgrade Banking Bot

Query

1 is Storage Locker Facility

4 ABHIRAMAPURAM ADITHANAR SALAI ADYAR
AMINIKARAI ANAKAPUTHUR ANNANAGAR ANNA...

Go to action: End

1 is CIBIL

5 The Credit Information Bureau (India) Limited (CIBIL) is the most popular of the four credit...

Go to action: End

1 is Find the nearest Branch

6 Please reach out to our customer care executive.

Go to action: End

1 is Currency Conversion Facility

7 All our bank branches have a Forex Exchange facility.

Go to action: End

New step +

Step 7 is taken with conditions

Conditions

If All of this is true:

1. Please select the ... is Currency Conversion Facility

and Add condition +

New condition group +

Assistant says

All our bank branches have a Forex Exchange facility.

Define customer response

Preview

General Query

go to Query

Please select the general queries listed below:

Currency Conversion Facility

Currency Conversion Facility

All our bank branches have a Forex Exchange facility.

go to End

Do you want to know other services?

Yes No

Type something...

1:14 PM 14-Nov-22

General Query - Currency Conversion Facility

6. Creating Net Banking Action

The screenshot displays the IBM Watson Assistant interface for configuring a 'Net Banking' action. The interface is divided into several sections:

- Customer starts with:** E-banking
- Conversation steps:** A list of steps for the conversation. Step 1 is highlighted, showing a trigger 'What Queries do you have regarding Net Banking?' and a response 'Facing errors... What is Net B... + 2'. Below this, there are three sub-steps, each with a trigger and a response, and a 'Go to action: End' button.
- Step 1 is taken:** A dropdown menu showing 'without conditions'.
- Assistant says:** A text area for the assistant's response. It contains the text 'What Queries do you have regarding Net Banking?' and a list of suggested responses: 'What is Net Banking?', 'How do I register for Net Banking?', 'What are the features of Net Banking?', and 'Facing errors in Net Banking'.
- And then:** A dropdown menu showing 'Continue to next step'.
- Preview:** A preview of the conversation flow, showing the assistant's response and the user's input.

Net Banking Action

The screenshot displays the IBM Watson Assistant interface for configuring a 'Net Banking' query action. The interface is divided into several sections:

- Customer starts with:** E-banking
- Conversation steps:** A list of steps for the conversation. Step 1 is highlighted, showing a trigger 'What Queries do you have regarding Net Banking?' and a response 'Facing errors... What is Net B... + 2'. Below this, there are three sub-steps, each with a trigger and a response, and a 'Go to action: End' button.
- Step 2 is taken:** A dropdown menu showing 'with conditions'.
- Conditions:** A section for defining conditions. It shows a condition '1. What Queries do ... is What is Net Banking?'.
- Assistant says:** A text area for the assistant's response. It contains the text 'Internet banking, also known as online banking or e-banking or Net Banking is a facility offered by banks and financial institutions that allow customers to use banking services over the internet. Customers need not visit their bank's branch office to avail each and every small service.'
- Preview:** A preview of the conversation flow, showing the assistant's response and the user's input.

Net Banking Query - What is Net Banking?

IBM Watson Assistant Lite Upgrade Banking Bot

Net Banking

1 is What is Net Banking?

2 Internet banking, also known as online banking or e-banking or Net Banking is a facility offered by bank...

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. - Open a fixed deposit account. - Pay utility bills such as water bil...

Go to action: End

1 is Facing errors in Net Banking

5 Please contact our customer care executive at +919876543210 or approach your nearest bank...

Go to action: End

New step +

and Add condition +

New condition group +

Assistant says

- Check the account statement online.
- Open a fixed deposit account.
- Pay utility bills such as water bill and electricity bill.
- Make merchant payments.
- Transfer funds.
- Order for a cheque book.
- Buy general insurance.
- Recharge prepaid mobile/DTH.

Define customer response

And then

Go to another action

Preview

What are the features of Net Banking?

- Check the account statement online.
- Open a fixed deposit account.
- Pay utility bills such as water bill and electricity bill.
- Make merchant payments.
- Transfer funds.
- Order for a cheque book.
- Buy general insurance.
- Recharge prepaid mobile/DTH.

go to End

Do you want to know other services?

Yes No

Type something...

Net Banking Query - Features of Net Banking

IBM Watson Assistant Lite Upgrade Banking Bot

Net Banking

1 is What is Net Banking?

2 Internet banking, also known as online banking or e-banking or Net Banking is a facility offered by bank...

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. - Open a fixed deposit account. - Pay utility bills such as water bil...

Go to action: End

1 is Facing errors in Net Banking

5 Please contact our customer care executive at +919876543210 or approach your nearest bank...

Go to action: End

New step +

and Add condition +

New condition group +

Assistant says

Please contact our customer care executive at +919876543210 or approach your nearest bank branch.

Define customer response

And then

Go to another action

Goes to action End

Pass values

Preview

Banking?

What is Net Banking?

How do I register for Net Banking?

What are the features of Net Banking?

Facing errors in Net Banking

Facing errors in Net Banking

Please contact our customer care executive at +919876543210 or approach your nearest bank branch.

go to End

Do you want to know other services?

Yes No

Type something...

Net Banking Query - Facing errors in Net Banking

IBM Watson Assistant Lite Upgrade Banking Bot

End

Customer starts with: End

Conversation steps

1 Do you want to know other services? Confirmation

2 Thank you. Continue to next step

3 This step has no content Go to action: Index

New step +

Step 2 is taken with conditions

Conditions 1 condition

If All of this is true:

1. Do you want to know... is No

and Add condition +

New condition group +

Assistant says

Thank you.

Define customer response

Preview

Facing errors in Net Banking

Please contact our customer care executive at +919876543210 or approach your nearest bank branch.

go to End

Do you want to know other services?

Yes No

No

Thank you.

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

Greeting ended

Use the up arrow for prior messages

End Greeting Action