

Team ID	PNT2022TMID39294
Project Name	AI-BASED DISCOURSE FOR BANKING INDUSTRY

# Creating Skills & Assistant For Chatbot

## Creating Current Account Action

**Progress 1:** Creating a new current action.

New action

What does your customer say to start this interaction?

Current

Cancel Save

**Progress 2:** Asking the user "what's your company type?" and show the available options immediately after the user chooses the current account.

Current

Customer starts with:  
Current

Conversation steps

1 What's your company type?  
Continue to next step

New step +

Step 1 is taken without conditions

Assistant says

What's your company type?

Define customer response

And then

Continue to next step

Preview

Edit response

Type: Option Add synonyms +

Option 1  
Proprietorship

Option 2  
Partnership

Option 3  
Example: Savings account

Cancel Apply

### Progress 3: The “proprietorship” answer is added.

The screenshot shows a chatbot configuration window titled "Current". On the left, the "Conversation steps" panel shows two steps. Step 1 asks "What's your company type?" with buttons for "Proprietorship" and "Partnership". Step 2 is highlighted and contains the text "Please take the following documents and approach the closest branch. 1)Income Tax Returns of the..." followed by a "Free text" input field. On the right, the "Step 2 is taken" panel shows a condition: "If All of this is true: 1. What's you... is Proprietorship". Below the condition is a text area for the assistant's response, which reads: "Please take the following documents and approach the closest branch. 1)Income Tax Returns of the proprietor for the last 3 years 2)Company Agreement 3)Pan card". A "Preview" button is at the bottom right.

### Progress 4: The “partnership” response is being added.

The screenshot shows the same chatbot configuration window, but now Step 3 is highlighted. Step 3 contains the text "Please take the following documents and approach the closest branch. 1)Income Tax..." followed by a "Free text" input field. On the right, the "Conditions" panel shows a new condition: "If All of this is true: 1. What's you... is Partnership". Below the condition is a text area for the assistant's response, which reads: "Please take the following documents and approach the closest branch. 1)Income Tax Returns of the proprietor for the last 3 years 2)Company Agreement 3)Pan card of both partners". A "Define customer response" dropdown is at the bottom, and a "Preview" button is at the bottom right.