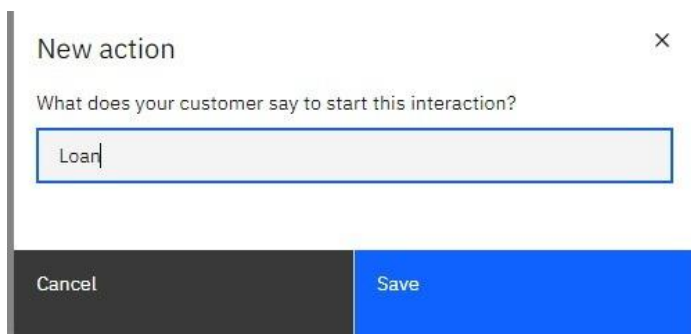


Team ID	PNT2022TMID39294
Project Name	AI-BASED DISCOURSE FOR BANKING INDUSTRY

Creating Skills & Assistant For Chatbot

Creating Loan Account Action

Progress 1: Created a new action for the Loan account.



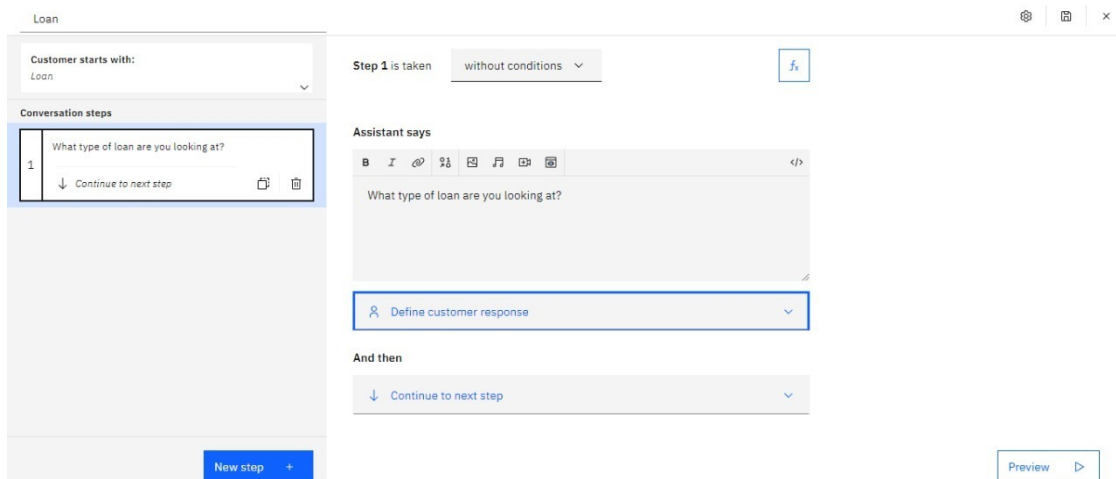
New action

What does your customer say to start this interaction?

Loan

Cancel Save

Progress 2: Asking the user "what type of loan are you looking for" and show the available options immediately after the user chooses the loan account query.



Loan

Customer starts with:
Loan

Conversation steps

1 What type of loan are you looking at?
Continue to next step

Step 1 is taken without conditions

Assistant says

What type of loan are you looking at?

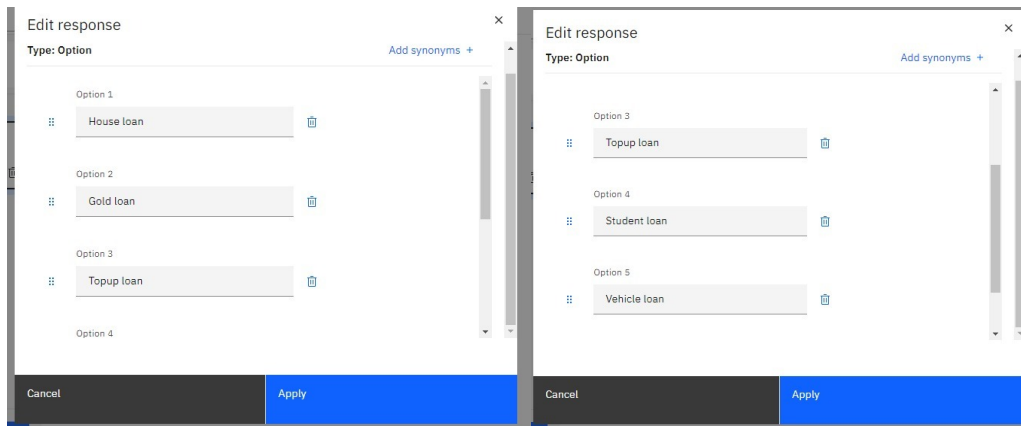
Define customer response

And then

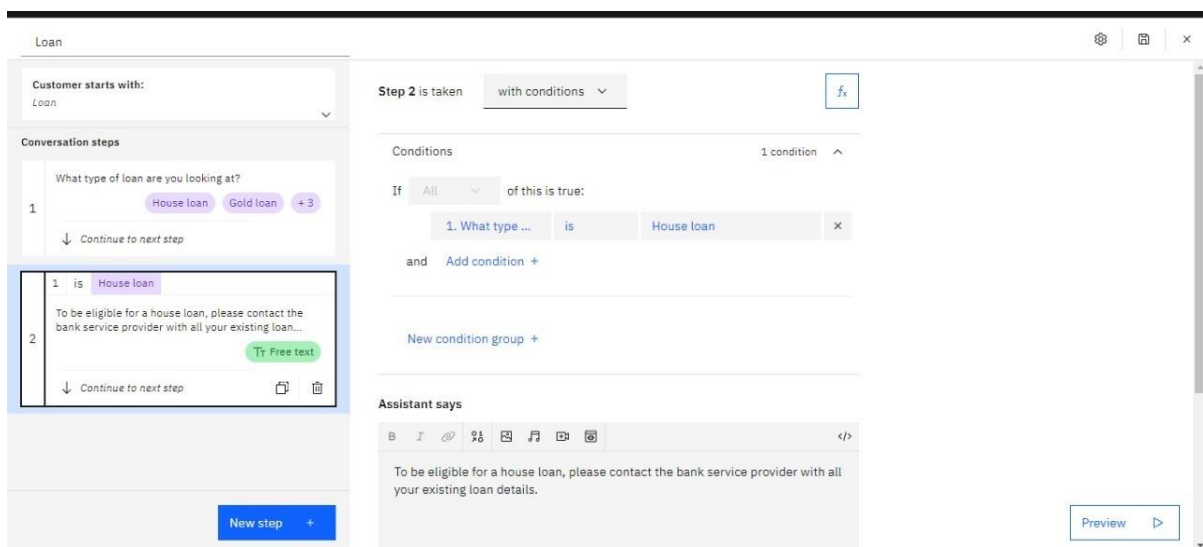
Continue to next step

New step

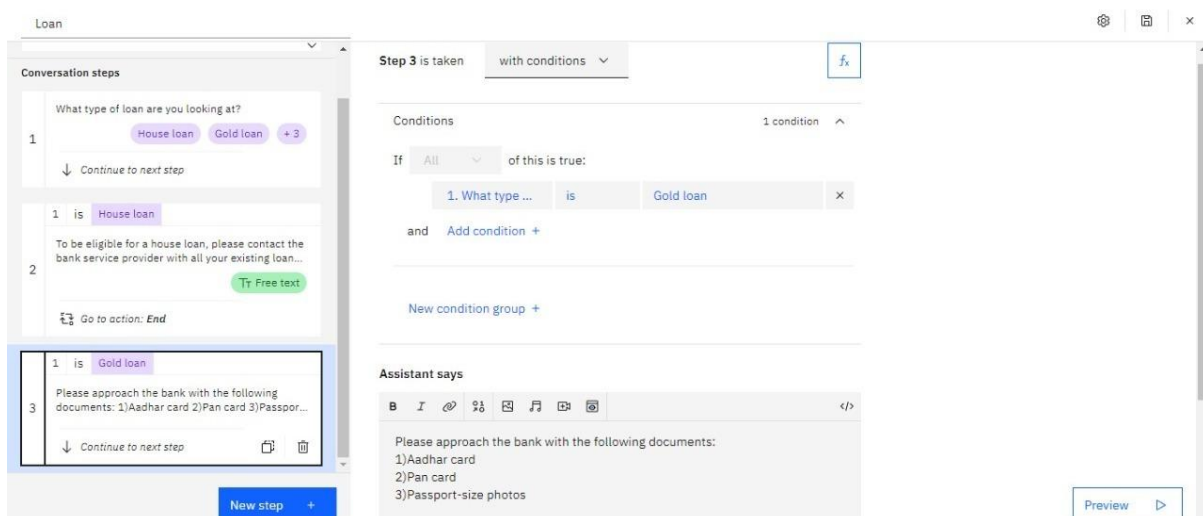
Preview



Progress 3: The “House loan” response is being added.



Progress 4: The “Gold loan” response is being added.



Progress 5: The “Top-up loan” response is being added.

The screenshot shows a loan flow editor with a list of steps on the left and a configuration panel on the right. The steps are:

- 1 is House loan
- 2 To be eligible for a house loan, please contact the bank service provider with all your existing loan...
- 3 Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passpor...
- 4 To be eligible for a house loan, please contact the bank service provider with all your existing loan...

The right panel shows the configuration for Step 4, which is taken with conditions. The condition is: If All of this is true: 1. What type ... is Topup loan. The Assistant says: To be eligible for a house loan, please contact the bank service provider with all your existing loan details.

Progress 6: The “Student loan” response is being added.

The screenshot shows the loan flow editor with the steps list updated to include a 'Student loan' step. The steps are:

- 1 is Gold loan
- 3 Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passpor...
- 4 To be eligible for a house loan, please contact the bank service provider with all your existing loan...
- 5 Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passpor...

The right panel shows the configuration for Step 5, which is taken with conditions. The condition is: If All of this is true: 1. What type ... is Student loan. The Assistant says: Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passport-size photos.

Progress 7: The “Vehicle loan” response is being added.

The screenshot shows the loan flow editor with the steps list updated to include a 'Vehicle loan' step. The steps are:

- 1 is Topup loan
- 4 To be eligible for a house loan, please contact the bank service provider with all your existing loan...
- 5 Please approach the bank with the following documents: 1)Aadhar card 2)Pan card 3)Passpor...
- 6 Kindly approach the bank with the following documents. 1)Automobile Invoice 2)Pan card...

The right panel shows the configuration for Step 6, which is taken with conditions. The condition is: If All of this is true: 1. What type ... is Vehicle loan. The Assistant says: Kindly approach the bank with the following documents. 1)Automobile Invoice 2)Pan card 3)Income Tax Returns for the last three years.