

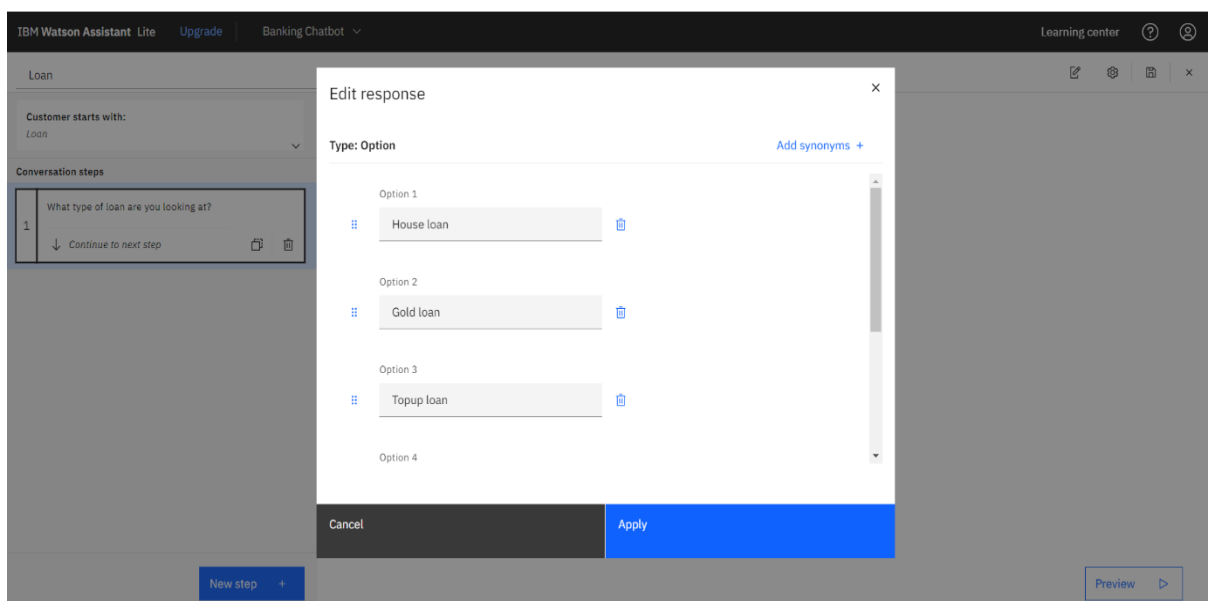
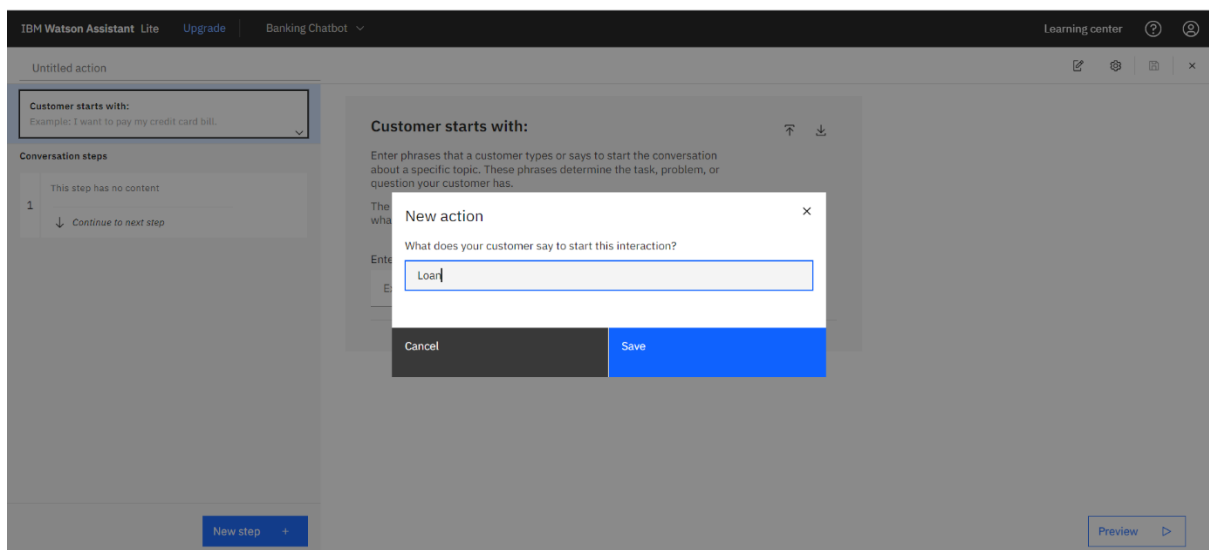
PROJECT DEVELOPMENT PHASE

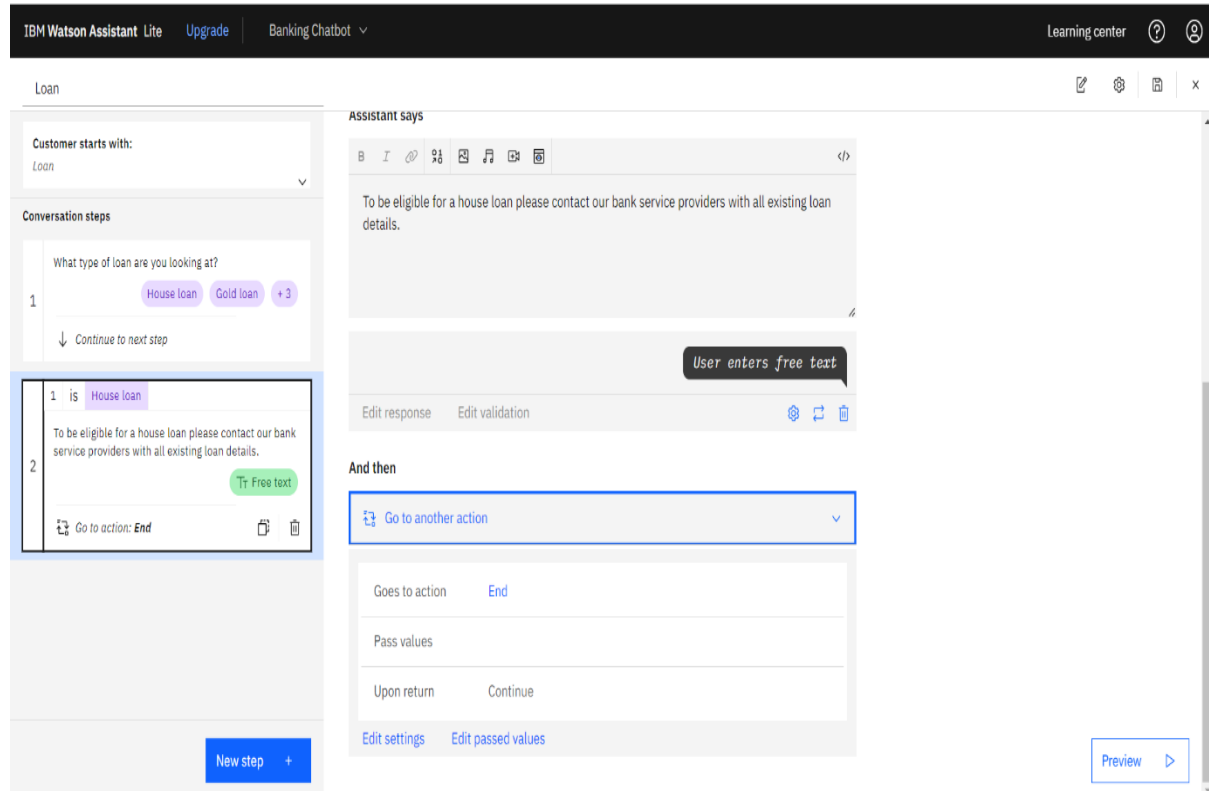
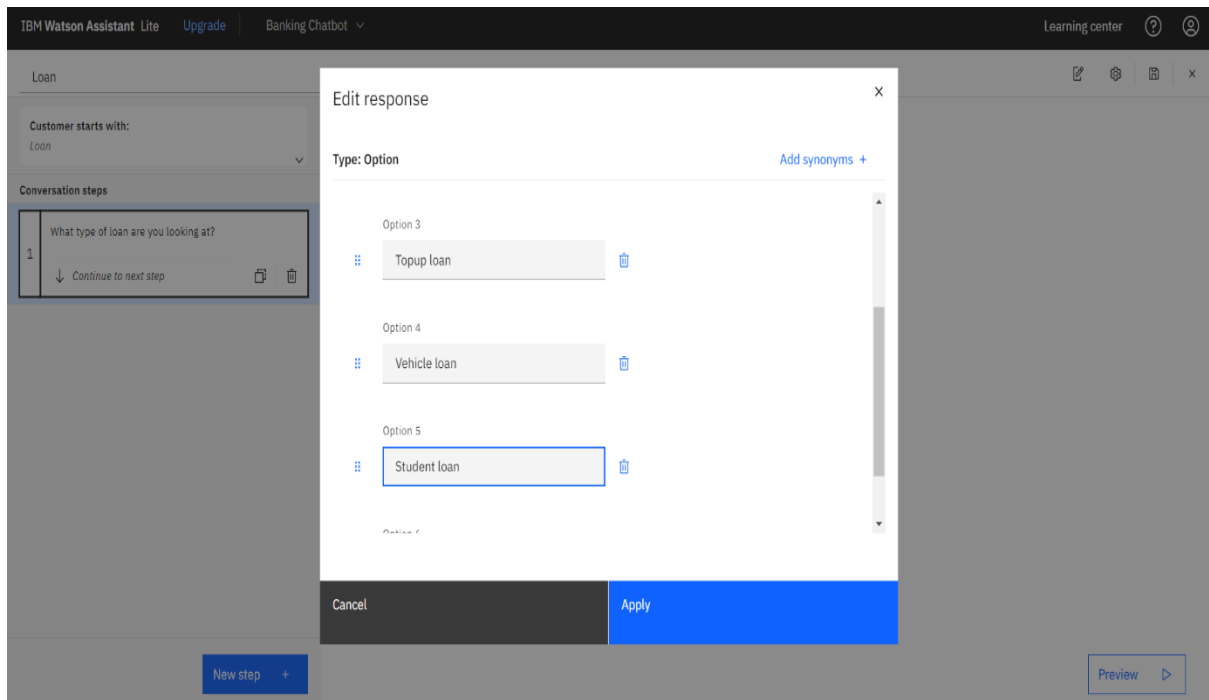
SPRINT 2

Date	05 November 2022
Team ID	PNT2022TMID00963
Project Name	Project -AI based discourse for Banking Industry

CREATING LOAN ACCOUNT ACTIONS:

User can choose the type of loans to know the information on choosing an essential loan schemes.





IBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

Loan

Customer starts with:
Loan

Conversation steps

1

What type of loan are you looking at?

House loanGold loan+3

Continue to next step

1 is House loan

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

Free text

Go to action: End

1 is Gold loan

Please approach the bank with the following Documents.

Free text

Go to action: End

New step

Step 3 is taken with conditions

Conditions

1 condition

If All of this is true:

1. What type of loan... 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

Preview

User enters free text

IBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

Loan

1

House loanGold loan+3

Continue to next step

1 is House loan

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

Free text

Go to action: End

1 is Gold loan

Please approach the bank with the following Documents.

Free text

Go to action: End

1 is Topup loan

To be eligible for a Top-up loan please contact our bank service providers with all existing loan details.

Free text

Go to action: End

New step

Assistant says

To be eligible for a Top-up loan please contact our bank service providers with all existing loan details.

User enters free text

Edit responseEdit validation

And then

Go to another action

Goes to actionEnd

Pass values

Upon returnContinue

Edit settingsEdit passed values

Preview

IBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

Index

Conversation steps

3 is Loan enquiry

1 This step has no content

Go to action: Loan

3 is Current Account

2 This step has no content

Go to action: Current

How can I help you?

3 Savings Acco... Current Acco... + 3

Continue to next step

3 is Savings Account

4 This step has no content

Go to action: Savings

New step

Step 1 is taken with conditions

Conditions 1 condition

If All of this is true:

3. How can I help yo... is Loan enquiry

and Add condition +

New condition group +

Assistant says

B I P % [] [] []

For example: Please select from the following options:

Preview

Loan enquiry

Loan enquiry

go to Loan

What type of loan are you looking at?

Topup loan

Topup loan

To be eligible for a Top-up loan please contact our bank service providers with all existing loan details.

thanks

type something...

IBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

Index

Conversation steps

3 is Loan enquiry

1 This step has no content

Go to action: Loan

3 is Current Account

2 This step has no content

Go to action: Current

How can I help you?

3 Savings Acco... Current Acco... + 3

Continue to next step

3 is Savings Account

4 This step has no content

Go to action: Savings

New step

Step 1 is taken with conditions

Conditions 1 condition

If All of this is true:

3. How can I help yo... is Loan enquiry

and Add condition +

New condition group +

Assistant says

B I P % [] [] []

For example: Please select from the following options:

Preview

Topup loan

Topup loan

To be eligible for a Top-up loan please contact our bank service providers with all existing loan details.

thanks

go to End

Do you want to know about some other services?

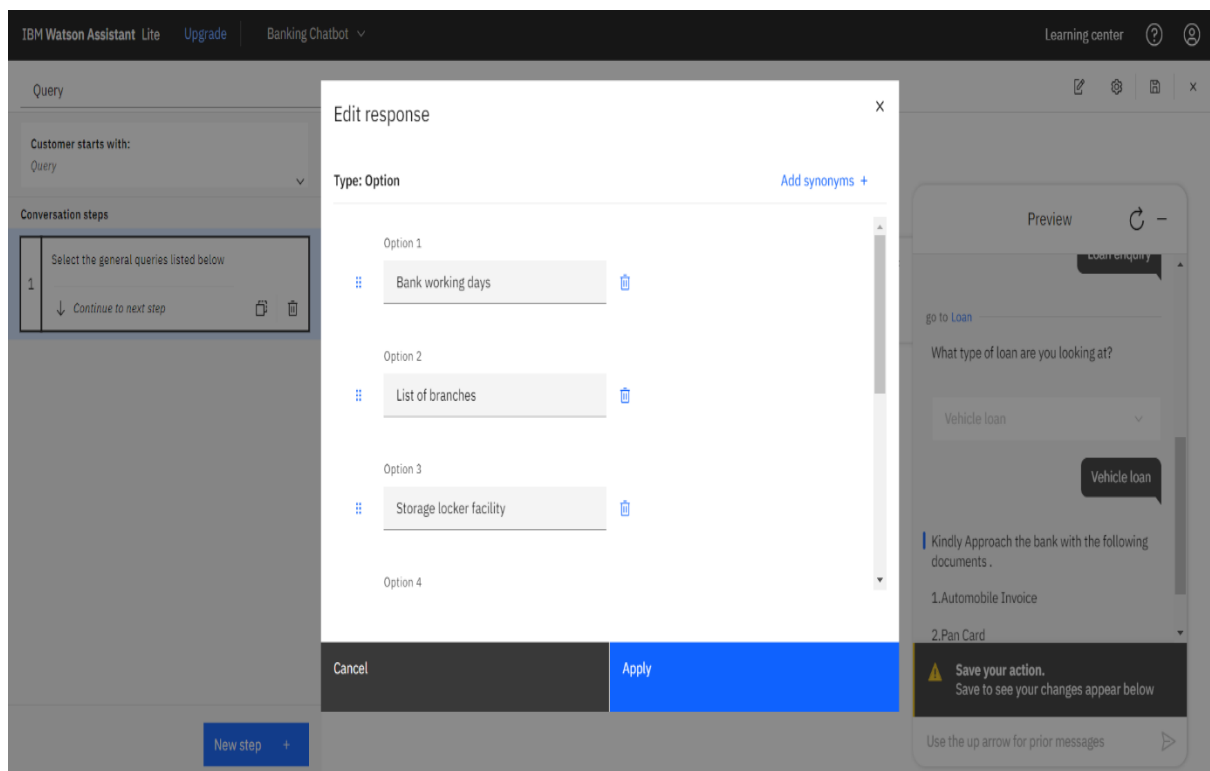
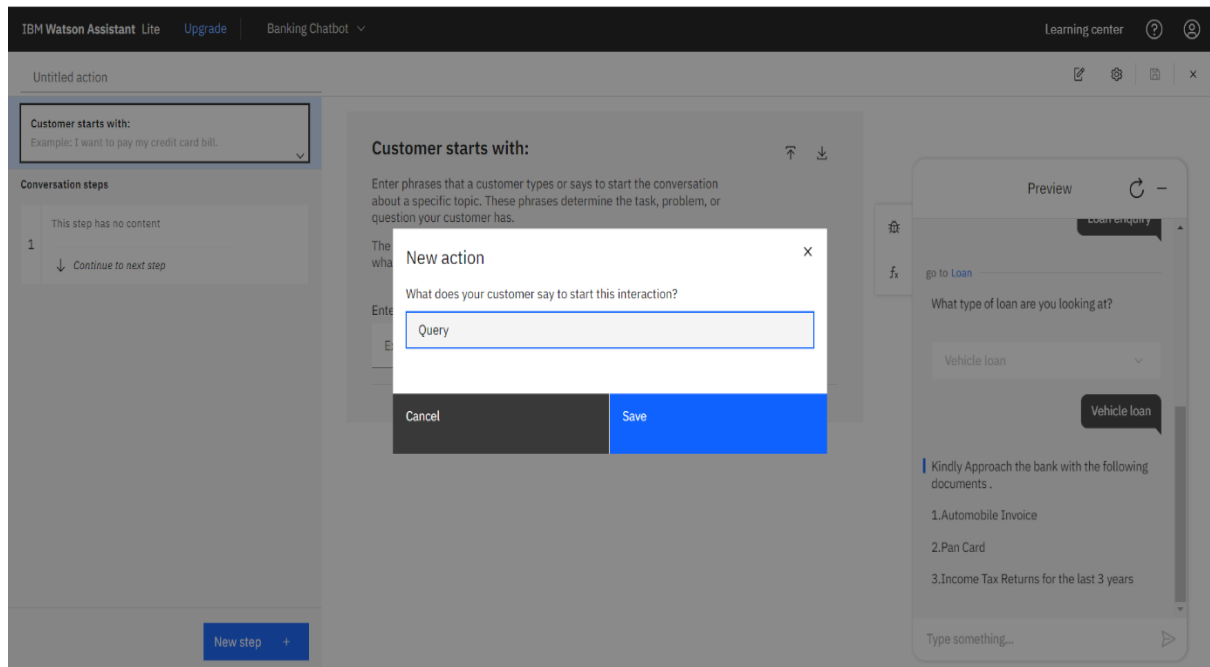
Yes No

type something...

Define customer response

CREATING GENERAL QUERY ACTIONS:

Users, if want to check the procedure details for Currency Conversion facility of my bank account. To ensure whether my loan application approved by the bank. For getting the procedure details for maintaining Storage Locker Facility of the bank account.



TBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

Query

Customer starts with:
Query

Conversation steps

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

2
1 is Bank working days
The Bank is open all the days from monday to saturday from 9am to 3pm , with exception of 2nd saturdays.
Go to action: End

New step +

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 the days from monday to saturday from 9am to 3pm , with exception of 2nd saturdays.

Define customer response

Preview

go to Loan

What type of loan are you looking at?

Vehicle loan

Vehicle loan

Kindly Approach the bank with the following documents .

1.Automobile Invoice

2.Pan Card

Save your action. Save to see your changes appear below

Type something...

TBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

Query

Customer starts with:
Query

Conversation steps

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

2
1 is Bank working days
The Bank is open all the days from monday to saturday from 9am to 3pm , with exception of 2nd saturdays.
Go to action: End

3
1 is List of branches
CHENNAI, WEST MAMBALAM,CHINMAYA NAGAR,VIRUGAMPAKKAM,CHITLAPAKKAM,CIT...
Go to action: End

New step +

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

CHENNAI, WEST MAMBALAM,CHINMAYA NAGAR,VIRUGAMPAKKAM,CHITLAPAKKAM,CIT NAGAR,DLF RAMAPURAM,EAST ABIRAMAPURAM,EGMORE BRANCH, IT AVENUE,KARAPAKKAM, KK NAGAR , KORATTUR , KOTTIVAKAM,KOTTURPURAM,KOYAMBEDU CHENNAI,MADAMBAKKAM

Define customer response

And then

Preview

What type of loan are you looking at?

Vehicle loan

Vehicle loan

Kindly Approach the bank with the following documents .

1.Automobile Invoice

2.Pan Card

3.Income Tax Returns for the last 3 years

Save your action. Save to see your changes appear below

Use the up arrow for prior messages

IBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center ?

Query

1 is Bank working days

The Bank is open all the days from monday to saturday from 9am to 3pm , with exception of 2nd...

2

Go to action: End

1 is List of branches

CHENNAI, WEST MAMBALAM,CHINMAYA NAGAR,VIRUGAMPAKKAM,CHITLAPAKKAM,CIT...

3

Go to action: End

1 is Storage locker facility

ADYAR,ADYAR GANDHI NAGAR,AKKARAI,ALWARPET,ANNA NAGAR...

4

Go to action: End

1 is Currency conversion facility

All our bank branches have a forex exchange facility

5

Go to action: End

New step +

Step 5 is taken with conditions

Conditions1 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 branches have a forex exchange facility

Define customer response

Preview

What type of loan are you looking at?

Vehicle loan

Vehicle loan

Kindly Approach the bank with the following documents .

1.Automobile Invoice

2.Pan Card

3.Income Tax Returns for the last 3 years

Save your action. Save to see your changes appear below

Use the up arrow for prior messages

IBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center ?

Query

1 is List of branches

CHENNAI, WEST MAMBALAM,CHINMAYA NAGAR,VIRUGAMPAKKAM,CHITLAPAKKAM,CIT...

3

Go to action: End

1 is Storage locker facility

ADYAR,ADYAR GANDHI NAGAR,AKKARAI,ALWARPET,ANNA NAGAR...

4

Go to action: End

1 is Currency conversion facility

All our bank branches have a forex exchange facility

5

Go to action: End

1 is CIBIL

The information listed on your credit report includes several variables that CIBIL uses to set your credit...

6

New step +

Assistant says

The information listed on your credit report includes several variables that CIBIL uses to set your credit score . The score is derived using the credit history found in the CIBIL Report CIBIL is an individual's credit payment history across loan types and credit institutions over a period of time.

Define customer response

And then

Go to another action

Goes to action End

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

What type of loan are you looking at?

Vehicle loan

Vehicle loan

Kindly Approach the bank with the following documents .

1.Automobile Invoice

2.Pan Card

3.Income Tax Returns for the last 3 years

Save your action. Save to see your changes appear below

Type something...

TBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

Query

1 is Storage locker facility

ADYAR,ADYAR GANDHI
NAGAR,AKKARAI,ALWARPET,ANNA NAGAR...

Go to action: End

1 is Currency conversion facility

All our bank branches have a forex exchange facility

Go to action: End

1 is CIBIL

The information listed on your credit report includes several variables that CIBIL uses to set your credit...

Go to action: End

1 is Find a nearest branch

Kindly reach out to our customer care executive

Go to action: End

New step

New condition group +

Assistant says

Kindly reach out to our customer care executive
Contact @982XXXXX07

Define customer response

And then

Go to another action

Goes to action End

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

TBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

Index

Customer starts with:
Index

Conversation steps

4 is General query

1 This step has no content

Go to action: Query

4 is Loan enquiry

2 This step has no content

Go to action: Loan

4 is Current Account

3 This step has no content

Go to action: Current

How can I help you?

New step

Step 1 is taken with conditions

Conditions 1 condition

If All of this is true:

4. How can I help yo... is General query

and Add condition +

New condition group +

Assistant says

For example: Please select from the following options:

Define customer response

Preview

go to Query

Select the general queries listed below

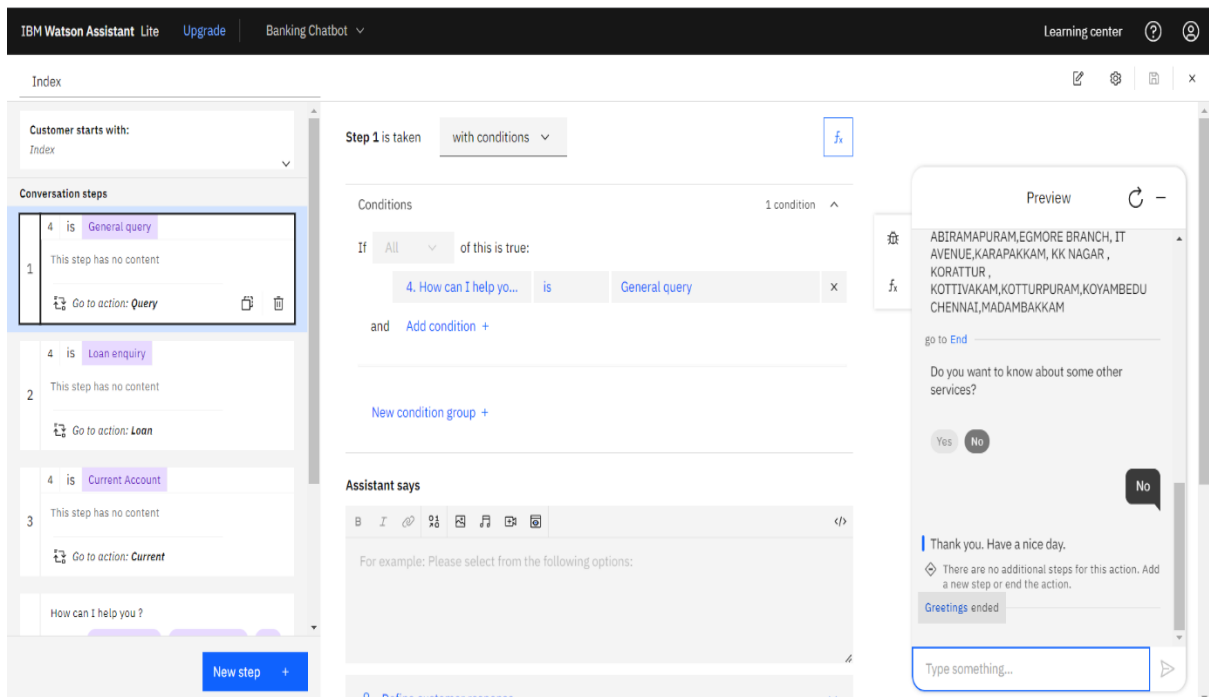
List of branches

CHENNAI, WEST MAMBALAM,CHINMAYA
NAGAR,VIRUGAMPAKKAM,CHITLAPAKKAM,CI
T NAGAR,DLF RAMAPURAM,EAST
ABIRAMAPURAM,EGMORE BRANCH, IT
AVENUE,KARAPAKKAM, KK NAGAR ,
KORATTUR ,
KOTTIVAKAM,KOTTURPURAM,KOYAMBEDU
CHENNAI,MADAMBAKKAM

go to End

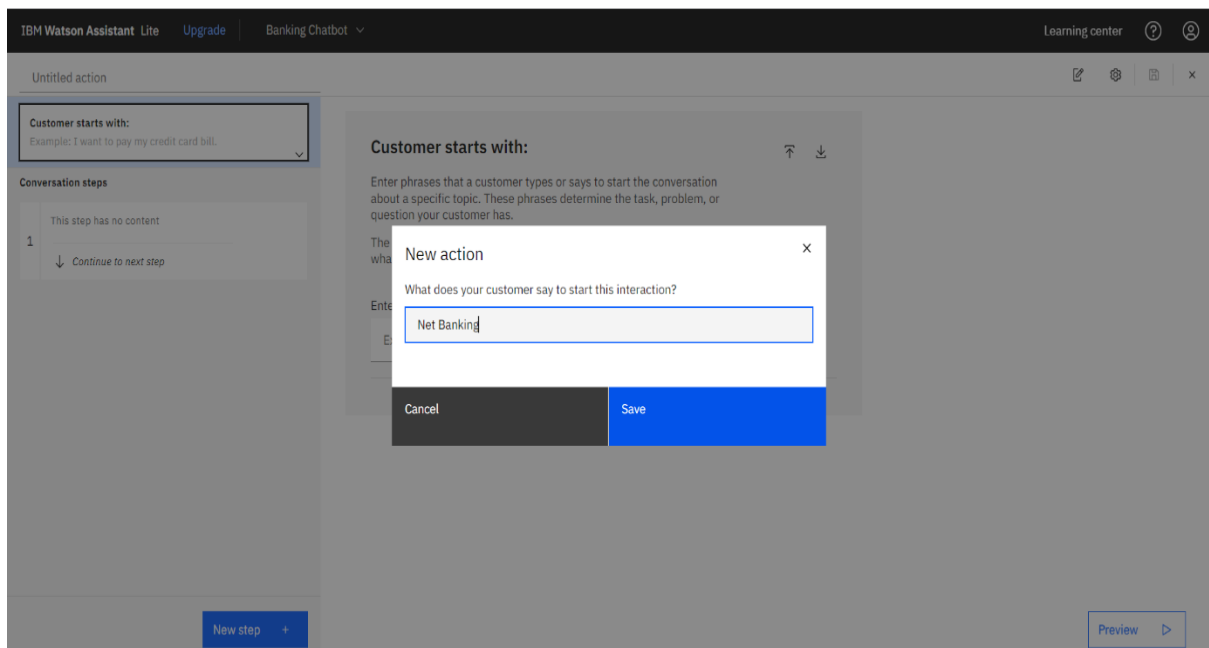
Do you want to know about some other

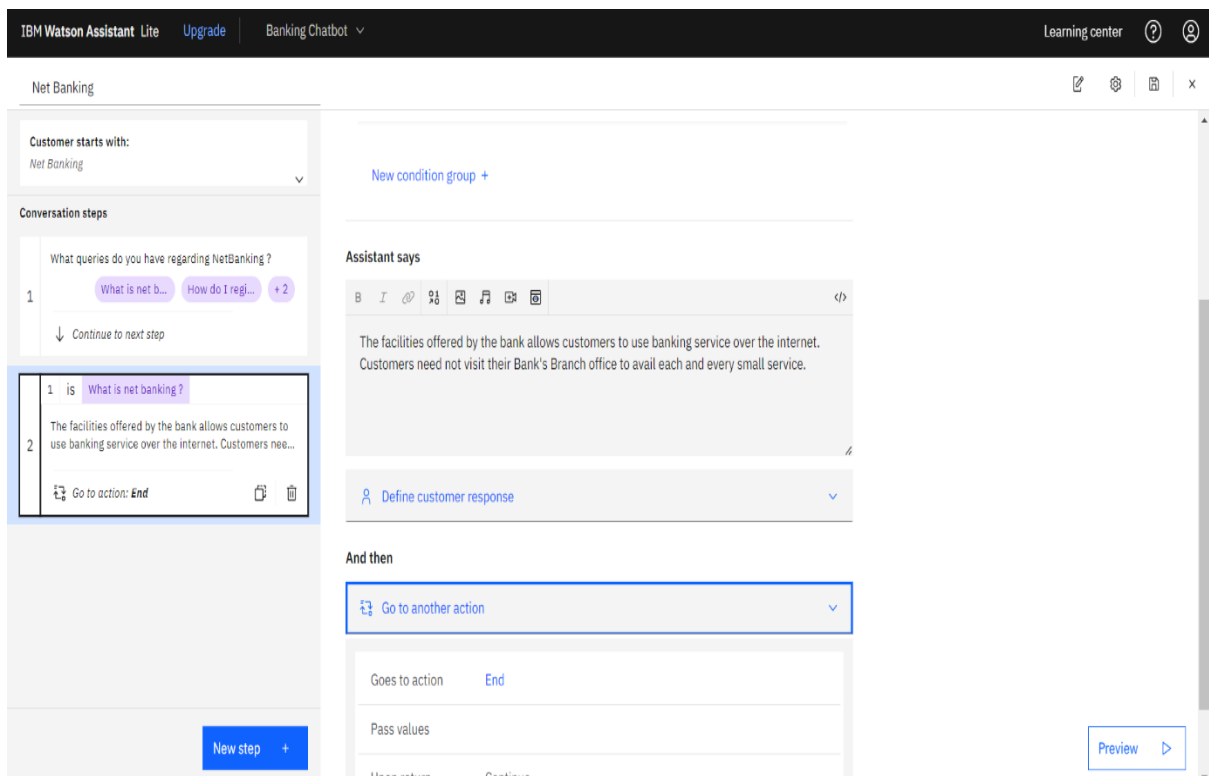
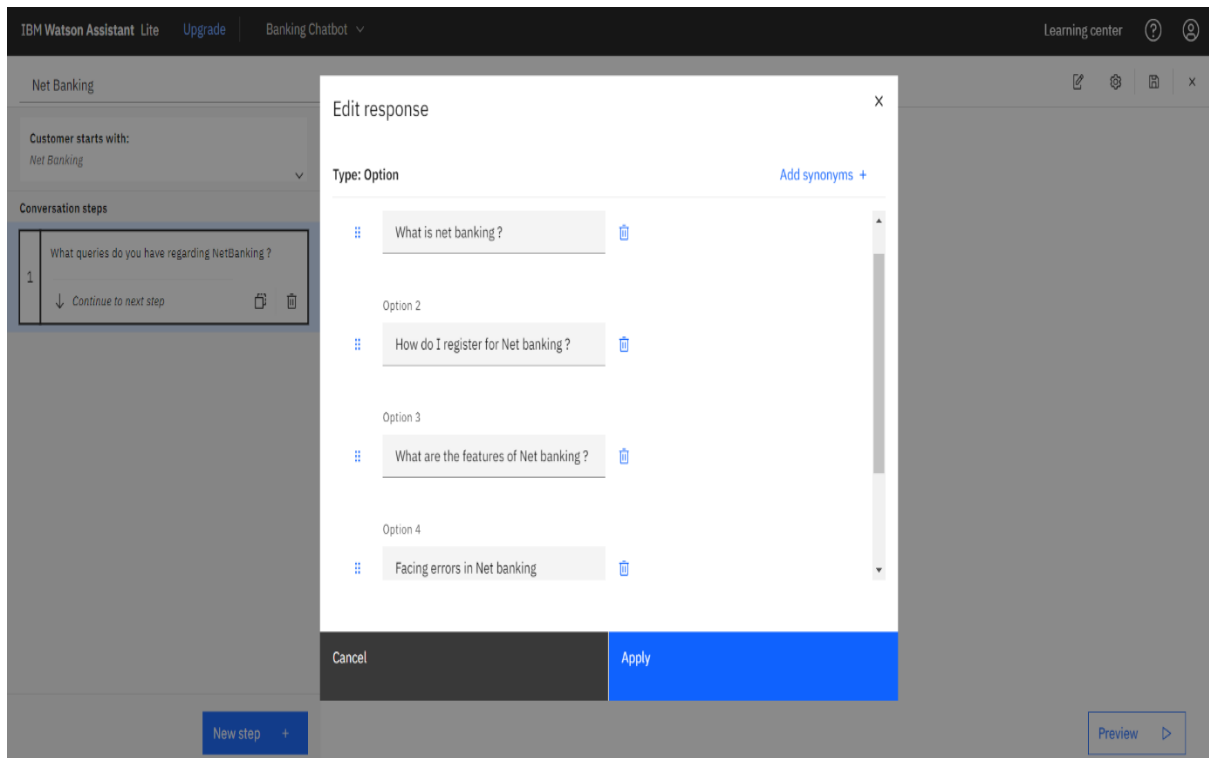
Type something...



NET BANKING RELATED ACTIONS:

To get the procedure details for changing Net Banking password and adding beneficiaries of the bank account.





IBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

Net Banking

Customer starts with:
Net Banking

Conversation steps

What queries do you have regarding NetBanking?

1

What is net b...How do I regi...+ 2

Continue to next step

1 is What is net banking?

2

The facilities offered by the bank allows customers to use banking service over the internet. Customers nee...

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 +

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

and Add condition +

New condition group +

Assistant says

B I @ % & * & & </>

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

Define customer response

And then

Go to another action

Preview

IBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

Net Banking

Customer starts with:
Net Banking

Conversation steps

What queries do you have regarding NetBanking?

1

What is net b...How do I regi...+ 2

Continue to next step

1 is What is net banking?

2

The facilities offered by the bank allows customers to use banking service over the internet. Customers nee...

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 +

New condition group +

Assistant says

B I @ % & * & & </>

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

Define customer response

And then

Go to another action

Goes to action End

Pass values

Upon return Continue

Preview

IBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

Net Banking

Conversation steps

What queries do you have regarding NetBanking?

1 is What is net b... How do I regi... + 2

Continue to next step

1 is What is net banking?

The facilities offered by the bank allows customers to use banking service over the internet. Customer...

2

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.

3

Go to action: End

1 is What are the features of Net banking?

1. Check the account statement online.

4

Go to action: End

New step +

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

1. Check the account statement online.
2. Open a fixed deposit account.
3. Pay utility bills such as water bills and electricity bills.
4. Make merchant payments.

Define customer response

Preview

And then

IBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

Index

Customer starts with:

Index

Conversation steps

5 is Net Banking

1 This step has no content

Go to action: Net Banking

5 is General query

2 This step has no content

Go to action: Query

5 is Loan enquiry

3 This step has no content

Go to action: Loan

5 is Current Account

New step +

Step 1 is taken with conditions

Conditions

1 condition

If All of this is true:

5. How can I help yo... is Net Banking

and Add condition +

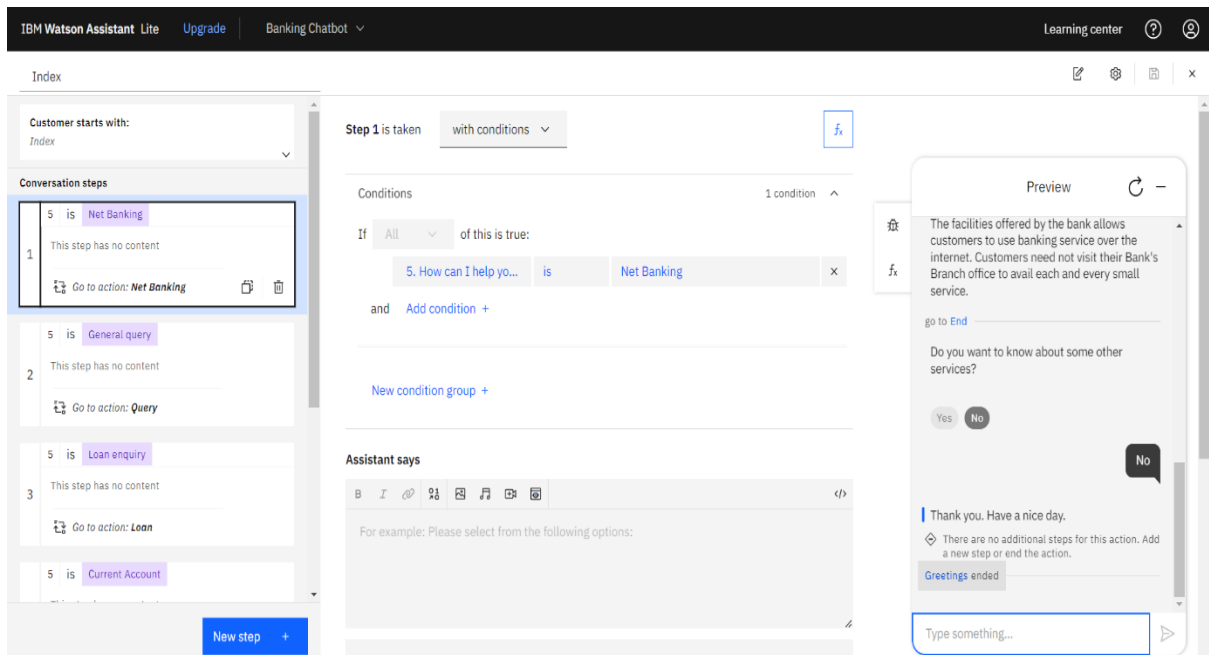
New condition group +

Assistant says

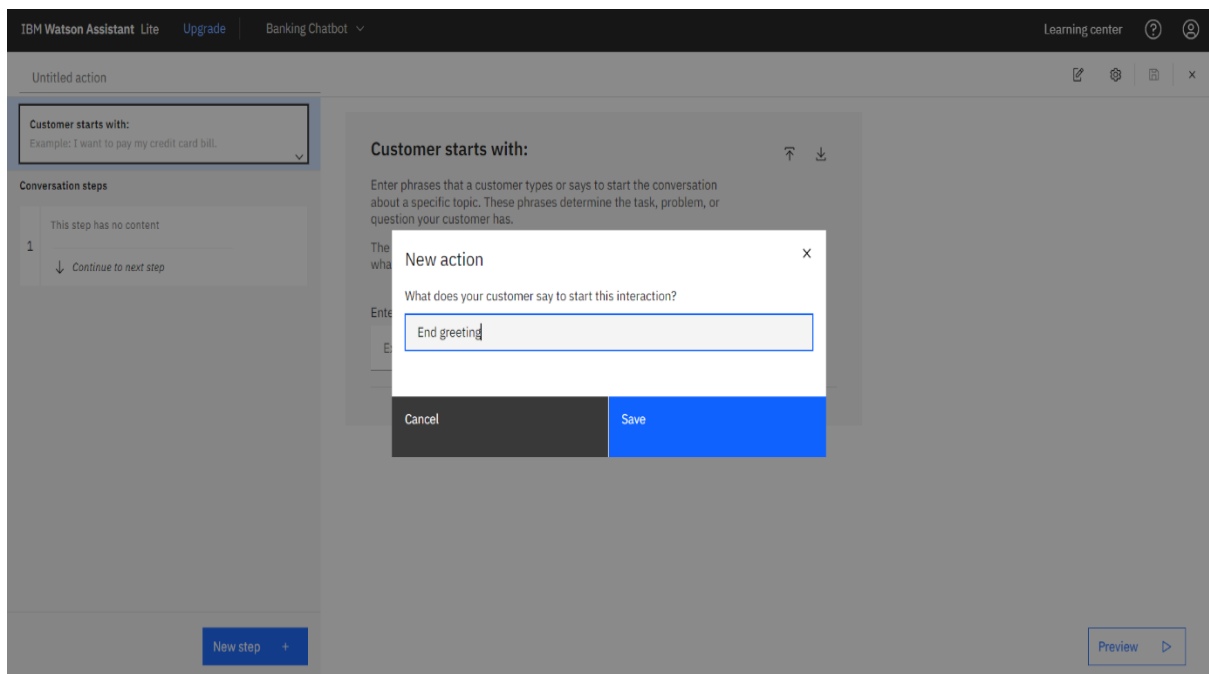
For example: Please select from the following options:

Preview

How do I register for Net banking ?
What are the features of Net banking ?
Facing errors in Net banking
What is net banking ?
The facilities offered by the bank allows customers to use banking service over the internet. Customers need not visit their Bank's Branch office to avail each and every small service.
go to End
Do you want to know about some other services?
Yes No
Type something...



END GREETINGS :



TBM Watson Assistant LiteUpgradeBanking Chatbot

Learning center

End greeting

Customer starts with:
End greeting

1

1

0

total step

end step

re-ask steps

Conversation steps

1

This step has no content

Action complete

New step

Step 1 is takenwithout conditions

Assistant says

For example: What type of transfer would you like to make?

Define customer response

And then

End the action

Preview

Do you want to know about some other services?

Yes

No

No

Thank you. Have a nice day.

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

Greetings ended

thank you

Action complete

End greeting ended

Type something...

TBM 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
Greet customer	5 hours ago	0	
No action matches	4 minutes ago	0	
Fallback	5 hours ago	5	

Preview

No action matches

Customer starts with:
Example: Can I have a sandwich?

Conversation steps

1

No action matches count ≤ 3

Kindly reach out to our customer care executive
Contact @982XXXXX07

Action complete

2

No action matches count > 3

This step has no content

Go to action: **Fallback**

New step +

Conditions 1 condition ^

If All of this is true:

No action matche... ≤ 3

X

and [Add condition +](#)

New condition group +

Assistant says

B **I** **Q** **%** **¶** **¶** **¶** **¶** **</>**

Kindly reach out to our customer care executive
Contact @982XXXXX07

[Define customer response](#)

And then

[Preview](#) ▶