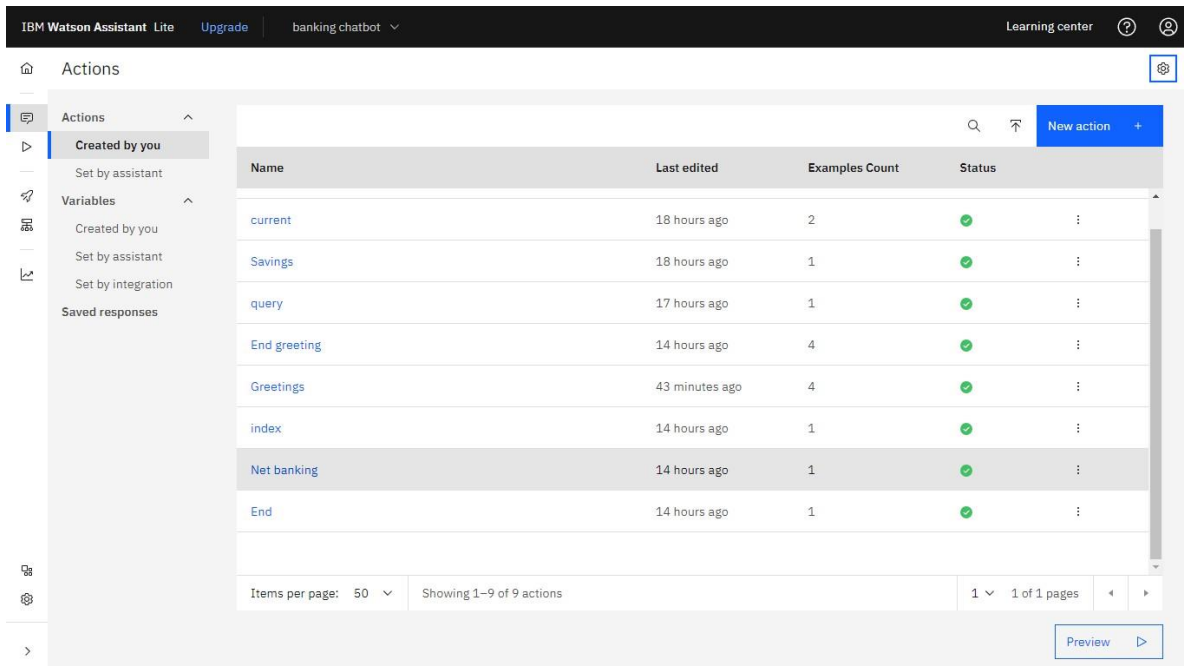


# AI BASED DISCOURSE FOR BANKING INDUSTRY

Team ID: PNT2022TMID10567

## Creating Skills And Assistant For Chatbot:

### Chatbot Skills Creation:



The screenshot shows the 'Actions' management interface in IBM Watson Assistant. The top navigation bar includes 'IBM Watson Assistant Lite', an 'Upgrade' button, the chatbot name 'banking chatbot', and links to 'Learning center', help, and user profiles. The left sidebar contains navigation options: 'Actions' (selected), 'Variables', and 'Saved responses'. Under 'Actions', there are sub-options: 'Created by you' (selected), 'Set by assistant', and 'Set by integration'. The main area displays a table of actions created by the user.

Name	Last edited	Examples Count	Status
current	18 hours ago	2	✓
Savings	18 hours ago	1	✓
query	17 hours ago	1	✓
End greeting	14 hours ago	4	✓
Greetings	43 minutes ago	4	✓
index	14 hours ago	1	✓
Net banking	14 hours ago	1	✓
End	14 hours ago	1	✓

At the bottom of the table, there is a pagination section showing 'Items per page: 50', 'Showing 1–9 of 9 actions', and '1 of 1 pages'. A 'Preview' button is located at the bottom right of the interface.

### Creating Saving Account Action:

IBM Watson Assistant Lite

Upgrade

banking chatbot

Learning center

Savings

Customer starts with:

Savings

Conversation steps

which type of saving account do you want create ?

1

zero savings ... kids saving a... + 1

Continue to next step

1 is Regular saving account

Great! please take the following documents and head towards the nearest branch.

2

Tr Free text

Go to action: End

1 is kids saving account

Awesome! Please take the following documents and head towards the nearest branch.

3

Tr Free text

Go to action: End

1 is zero savings account

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

Savings

Preview

## Creating Current Account Action:

IBM Watson Assistant Lite

Upgrade

Banking Bot

Learning center

Current

Customer starts with:

Current account

Conversation steps

What's your company type?

1

Partnership Proprietorship

Continue to next step

1 is Proprietorship

Please take the following Documents and approach the closest branch 1.Income Tax Returns of the proprieto...

2

Go to action: End

1 is Partnership

Please take the following Documents and approach the closest branch 1.Income Tax Returns of the all the...

3

Go to action: End

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

Current

Current account

Preview

## Creating Loan Account Action:

IBM Watson Assistant Lite Upgrade banking chatbot

Learning center ?

Loan

Customer starts with:

Loan

Conversation steps

What type of loan are looking at?

1

gold loan house 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 details.

2

Try Free text

Go to action: End

1 is gold loan

Please Approach the bank with the following documents.

3

Try Free text

Go to action: End

1 is Topup loan

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 action

Loan

Preview >

## Creating General Query Action:

IBM Watson Assistant Lite Upgrade banking chatbot

Learning center ?

query

Customer starts with:

query

Conversation steps

Select the general queries listed below.

1

CIBIL Find the near... + 4

Continue to next step

1 is Banking Working Days

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

2

Go to action: End

1 is List of Branches

CHENNAI WEST MAMBALAM, CHINMAYA NAGAR VIRUGAM PAKKAM, CHITLAPAKKAM, CIT NAGAR...

3

Go to action: End

1 is Storage Locker Facility

ADAYAR, ADAYAR GANDHI NAGAR, AKKARAI,ALWARPET=VASANTHAM COLONY...

4

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

query

Preview >

# Creating Net Banking Action:

IBM Watson Assistant Lite Upgrade banking chatbot

Learning center ?

Net banking

Customer starts with:  
Net banking

Conversation steps

what queries do you have regarding Net banking?

1 facing errors ... what are feat... + 2

Continue to next step

1 is What is Net Banking?

2 Net banking is a service provided by banks that allows customers to access banking services...

Go to action: End

1 is How do I Register for Net Banking?

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

Go to action: End

1 is what are features of Net Banking?

4 - check the account statement online - open a fixed deposits account - pay utility bills such as...

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

Net banking

Preview ▶