

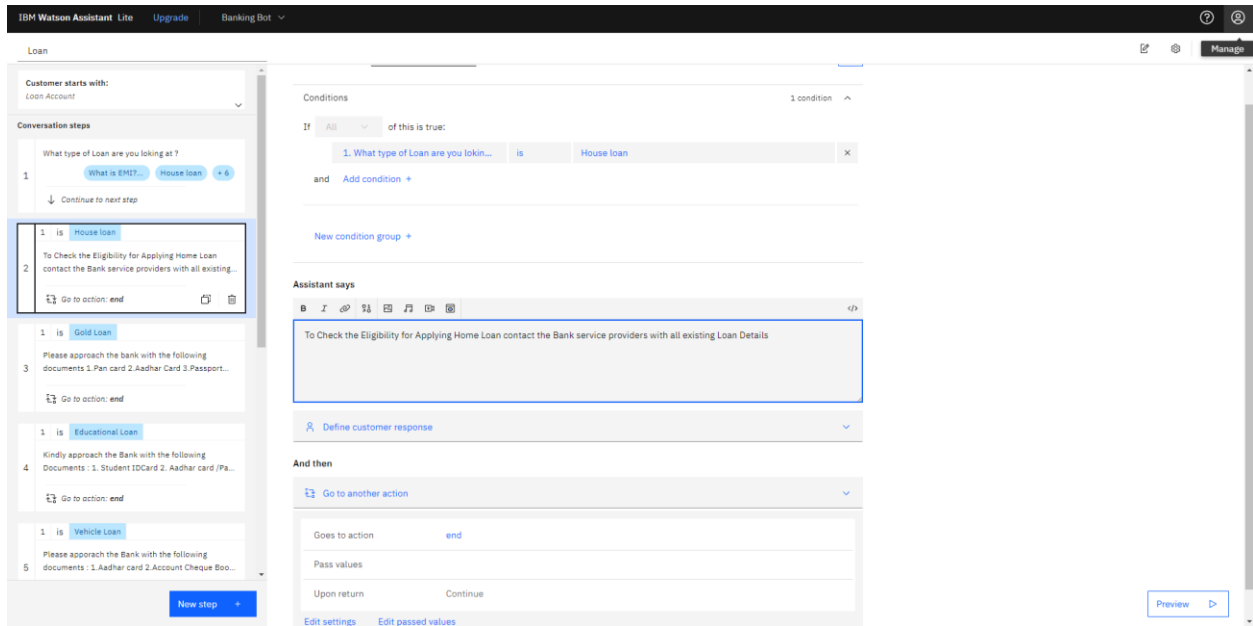
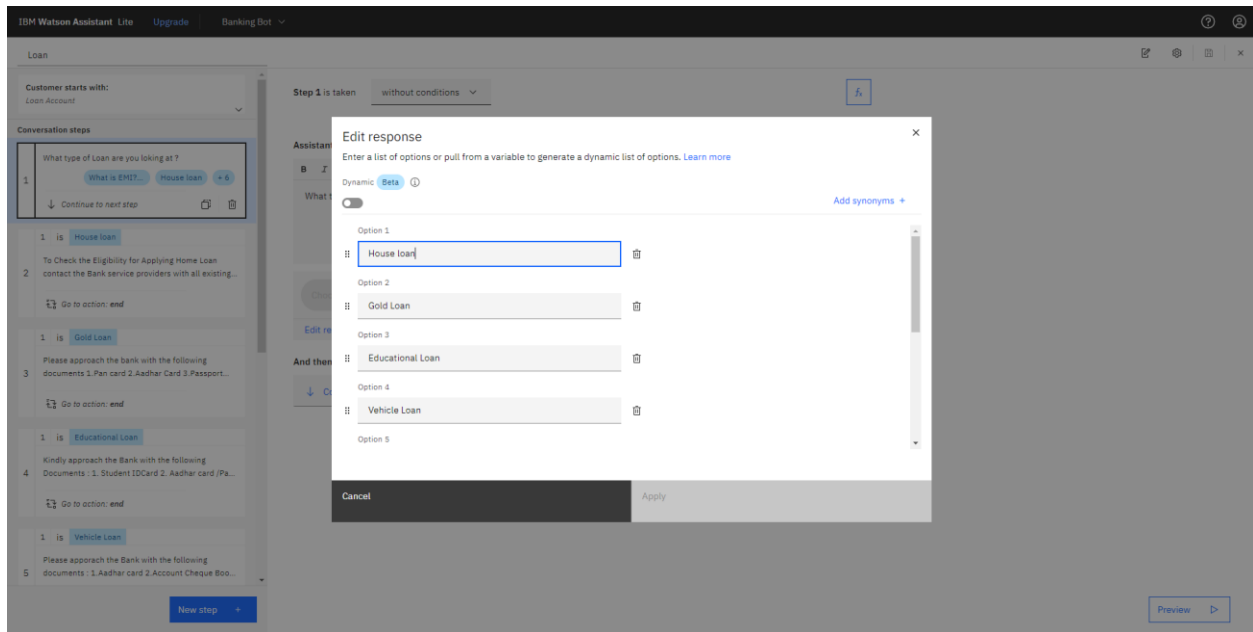
CREATING SKILLS & ASSISTANT FOR CHATBOT CHATBOT LOAN QUERY ACTION

Date	19 September 2022
Team ID	PNT2022TMID37046
Project Name	AI based discourse for Banking Industry

Creating Loan Queriers Action:

The screenshot shows the IBM Watson Assistant interface for configuring a skill named 'Loan'. The left sidebar displays the 'Conversation steps' for the skill, which are organized into five numbered steps. Each step has a 'What type of Loan are you looking at?' prompt and a 'Continue to next step' button. The steps are: 1. House loan, 2. Gold Loan, 3. Educational Loan, 4. Educational Loan, and 5. Vehicle Loan. The right pane shows the 'Customer starts with:' section, which includes a text input field for entering phrases and a list of phrases: 'Loan' and 'Loan Account'. The 'Total' count for phrases is 2.

The screenshot shows the IBM Watson Assistant interface for configuring a skill named 'Loan'. The left sidebar displays the 'Conversation steps' for the skill, which are organized into five numbered steps. Each step has a 'What type of Loan are you looking at?' prompt and a 'Continue to next step' button. The steps are: 1. House loan, 2. Gold Loan, 3. Educational Loan, 4. Educational Loan, and 5. Vehicle Loan. The right pane shows the 'Assistant says' section, which includes a text input field for entering the assistant's response. The input field contains the prompt 'What type of Loan are you looking at?'. Below the input field are buttons for 'Edit response' and 'Edit validation'. The 'And then' section shows a 'Continue to next step' button.



IBM Watson Assistant LiteUpgradeBanking Bot

Loan

Conversation steps

1

What type of Loan are you looking at?

What is EMIT... House loan +6

Continue to next step

1

is House loan

2

To Check the Eligibility for Applying Home Loan contact the Bank service providers with all existing...

Go to action: end

1

is Gold Loan

Please approach the bank with the following documents 1.Pan card 2.Aadhar Card 3.Passport...

Go to action: end

1

is Educational Loan

Kindly approach the Bank with the following Documents : 1. Student IDCard 2. Aadhar card /Pa...

Go to action: end

1

is Vehicle Loan

Please approach the Bank with the following documents : 1.Aadhar card 2.Account Cheque Boo...

Go to action: end

New step

Conditions

1 condition

If All of this is true:

1. What type of Loan are you lookin... 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

Define customer response

And then

Go to another action

Goes to action end

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

IBM Watson Assistant LiteUpgradeBanking Bot

Loan

Conversation steps

1

is House loan

2

To Check the Eligibility for Applying Home Loan contact the Bank service providers with all existing...

Go to action: end

1

is Gold Loan

Please approach the bank with the following documents 1.Pan card 2.Aadhar Card 3.Passport...

Go to action: end

1

is Educational Loan

Kindly approach the Bank with the following Documents : 1. Student IDCard 2. Aadhar card /Pa...

Go to action: end

1

is Vehicle Loan

Please approach the Bank with the following documents : 1.Aadhar card 2.Account Cheque Boo...

Go to action: end

1

is Health Loan

Kindly approach the Bank with the following document 1. Pan card 2. Medical Certificate 3. Ban...

Go to action: end

New step

Conditions

1 condition

If All of this is true:

1. What type of Loan are you lookin... is Educational Loan

and Add condition +

New condition group +

Assistant says

Kindly approach the Bank with the following Documents :
1. Student IDCard
2. Aadhar card /Pan card
3. Father Income certificate
4. Mark Sheet

Define customer response

And then

Go to another action

Goes to action end

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

IBM Watson Assistant LiteUpgradeBanking Bot

Loan

1 is Gold Loan

3 Please approach the Bank with the following documents : 1. Pan card 2. Aadhar Card 3. Passport...

Go to action: end

1 is Educational Loan

4 Kindly approach the Bank with the following Documents : 1. Student IDCard 2. Aadhar card /Pa...

Go to action: end

1 is Vehicle Loan

5 Please approach the Bank with the following documents : 1. Aadhar card 2. Vehicle Invoice 3...

Go to action: end

1 is Health Loan

6 Kindly approach the Bank with the following document 1. Pan card 2. Medical Certificate 3. Ban...

Go to action: end

1 is What is EMI? How is it calculated?

7 EMI stands for Equated Monthly Instalments. This installment comprises both principal and interest...

Go to action: end

Conditions

1 condition

If All of this is true:

1. What type of Loan are you lokin... is Vehicle Loan

and Add condition +

New condition group +

Assistant says

Please approach the Bank with the following documents :

1. Aadhar card

2. Vehicle Invoice

3. Account Cheque Book

4. Passport Size Photos

Define customer response

And then

Go to another action

Goes to action end

Pass values

Upon return Continue

Preview

IBM Watson Assistant LiteUpgradeBanking Bot

Loan

Go to action: end

1 is Educational Loan

4 Kindly approach the Bank with the following Documents : 1. Student IDCard 2. Aadhar card /Pa...

Go to action: end

1 is Vehicle Loan

5 Please approach the Bank with the following documents : 1. Aadhar card 2. Vehicle Invoice 3...

Go to action: end

1 is Health Loan

6 Kindly approach the Bank with the following document 1. Pan card 2. Medical Certificate 3. Ban...

Go to action: end

1 is What is EMI? How is it calculated?

7 EMI stands for Equated Monthly Instalments. This installment comprises both principal and interest...

Go to action: end

1 is What is the maximum tenor of the loan?

8 3 years

Go to action: end

Conditions

1 condition

If All of this is true:

1. What type of Loan are you lokin... is Health Loan

and Add condition +

New condition group +

Assistant says

Kindly approach the Bank with the following document

1. Pan card

2. Medical Certificate

3. Bank Statements

Define customer response

And then

Go to another action

Goes to action end

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

IBM Watson Assistant Life Upgrade Banking Bot

Loan

Go to action: end

1 is Vehicle Loan

5 Please approach the Bank with the following documents : 1. Aadhar card 2. Vehicle Invoice 3...

Go to action: end

1 is Health Loan

6 Kindly approach the Bank with the following document 1. Pan card 2. Medical Certificate 3. Ban...

Go to action: end

1 is What is EMI? How is it calculated?

7 EMI stands for Equated Monthly Installments. This installment comprises both principal and interest...

Go to action: end

1 is What is the maximum tenor of the loan?

8 3 years

Go to action: end

1 is Can I prepay the loan?

9 You may prepay the loan, either partly or in full, at any stage, with no prepayment penalty .

Go to action: end

New step +

Conditions1 condition

If All of this is true:

1. What type of Loan are you lookin... is What is EMI? How is it calculated?

and Add condition +

New condition group +

Assistant says

EMI stands for Equated Monthly Installments. This installment comprises both principal and interest components. Your EMI would be calculated depending on the tenor you choose, to repay your loan. The EMI would be higher if you choose to repay within a shorter period as against a longer-term loan. You can also contact your nearest branch to know the EMI for proposed loan amount and tenor.

Define customer response

And then

Go to another action

Goes to action end

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

IBM Watson Assistant Life Upgrade Banking Bot

Loan

Go to action: end

1 is Vehicle Loan

5 Please approach the Bank with the following documents : 1. Aadhar card 2. Vehicle Invoice 3...

Go to action: end

1 is Health Loan

6 Kindly approach the Bank with the following document 1. Pan card 2. Medical Certificate 3. Ban...

Go to action: end

1 is What is EMI? How is it calculated?

7 EMI stands for Equated Monthly Installments. This installment comprises both principal and interest...

Go to action: end

1 is What is the maximum tenor of the loan?

8 3 years

Go to action: end

1 is Can I prepay the loan?

9 You may prepay the loan, either partly or in full, at any stage, with no prepayment penalty .

Go to action: end

New step +

Conditions1 condition

If All of this is true:

1. What type of Loan are you lookin... is What is the maximum tenor of the loan?

and Add condition +

New condition group +

Assistant says

3 years

Define customer response

And then

Go to another action

Goes to action end

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

IBM Watson Assistant Line Upgrade Banking Bot

Loan

Go to action: end

1 is Vehicle Loan

Please approach the Bank with the following documents : 1. Aadhar card 2. Vehicle Invoice 3...

Go to action: end

1 is Health Loan

Kindly approach the Bank with the following document 1. Pan card 2. Medical Certificate 3. Ban...

Go to action: end

1 is What is EMI? How is it calculated?

EMI stands for Equated Monthly Installments. This installment comprises both principal and interest...

Go to action: end

1 is What is the maximum tenor of the loan?

3 years

Go to action: end

1 is Can I prepay the loan?

You may prepay the loan, either partly or in full, at any stage, with no prepayment penalty .

Go to action: end

New step

Conditions1 condition

IfAll of this is true:

1. What type of Loan are you lokin... is Can I prepay the loan?

andAdd condition

New condition group

Assistant says

You may prepay the loan, either partly or in full, at any stage, with no prepayment penalty .

Define customer response

And then

Go to another action

Goes to actionend

Pass values

Upon returnContinue

Edit continueEdit passed values

Preview