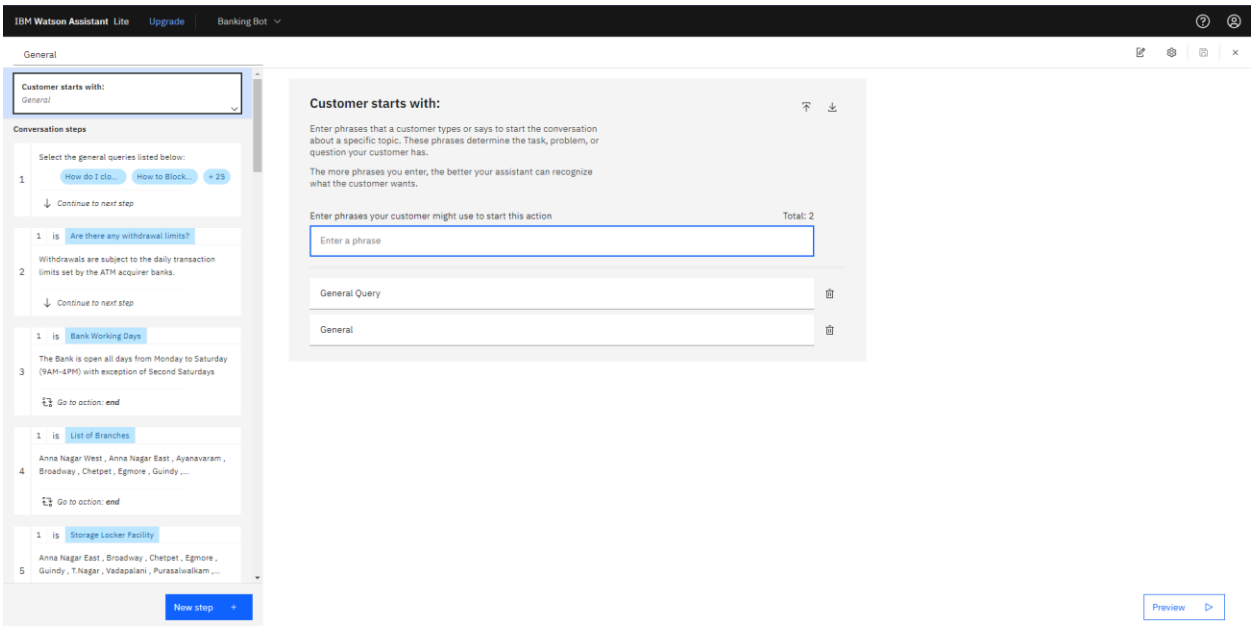
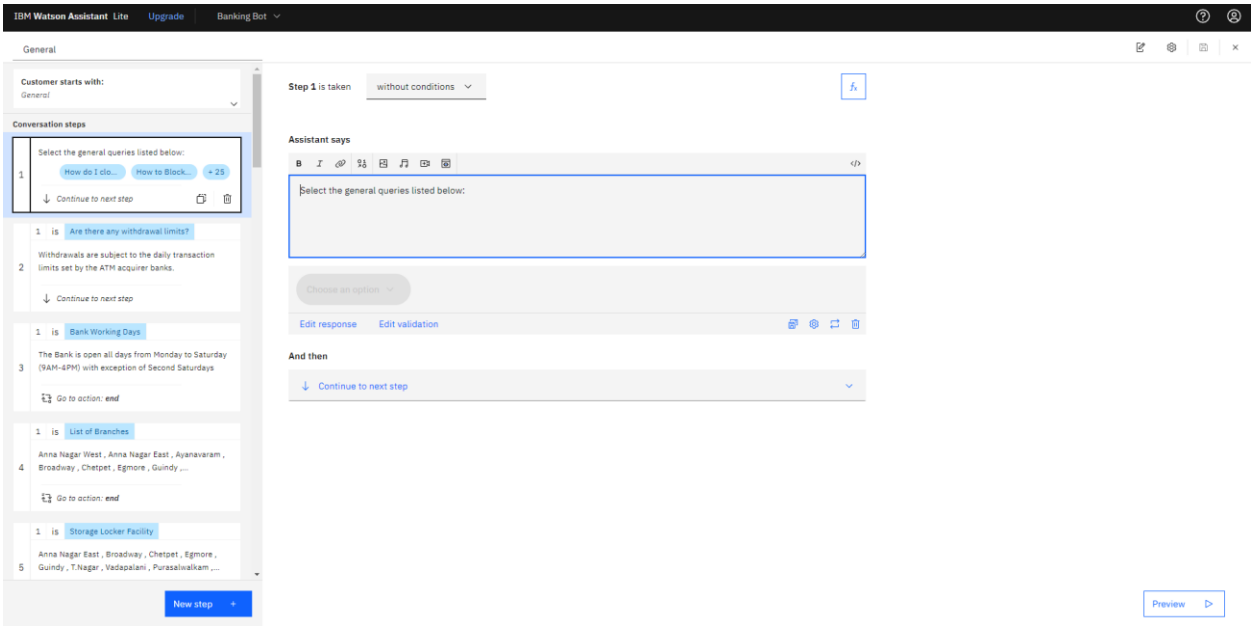
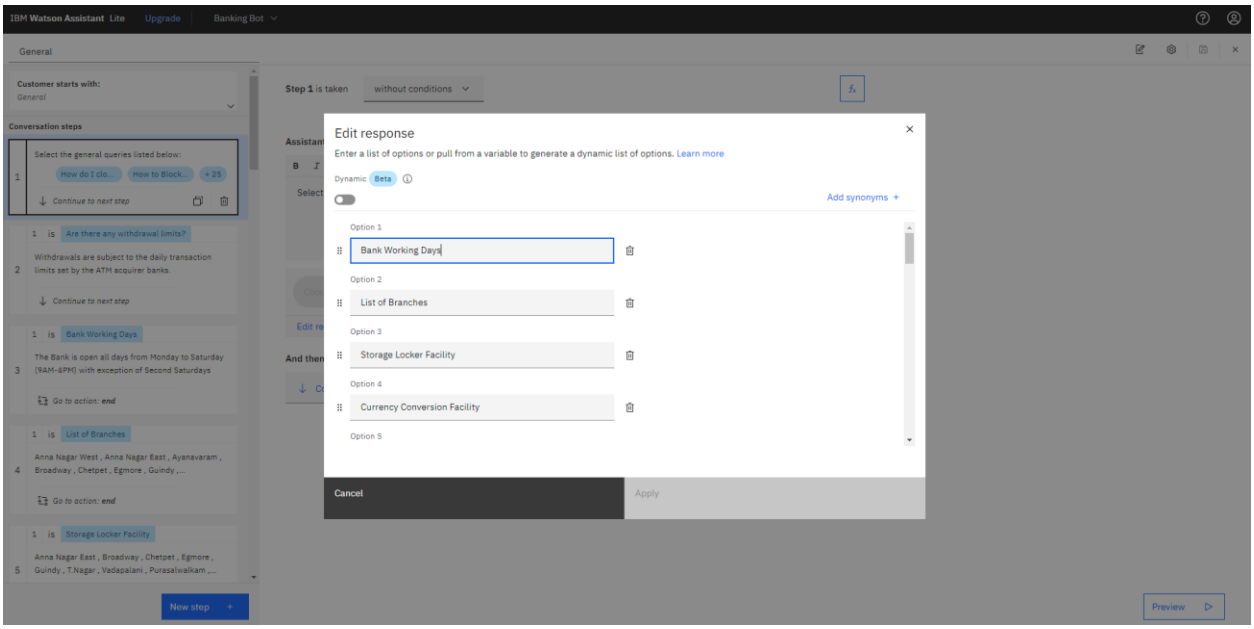
CREATING SKILLS & ASSISTANT FOR CHATBOT
CHATBOT GENERAL QUERY ACTION

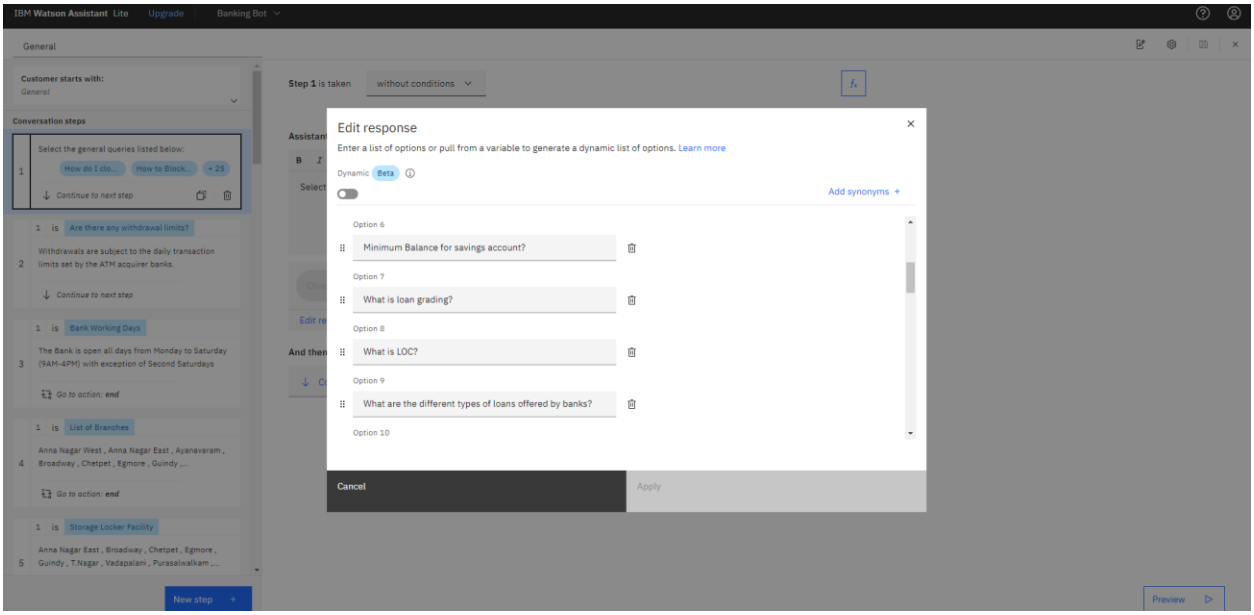
Date	19 September 2022
Team ID	PNT2022TMID37046
Project Name	AI based discourse for Banking Industry

Creating General Queriers Action:






IBM Watson Assistant Lite
Upgrade
Banking Bot
General
Customer starts with:
General
Conversation steps
Select the general queries listed below:
How do I clo...
How to Block...
+ 25
Continue to next step
1 is Are there any withdrawal limits?
Withdrawals are subject to the daily transaction limits set by the ATM acquirer banks.
Continue to next step
1 is Bank Working Days
The Bank is open all days from Monday to Saturday (9AM-4PM) with exception of Second Saturdays
Go to action: end
1 is List of Branches
Anna Nagar West , Anna Nagar East , Ayanavaram , Broadway , Chetpet , Egmore , Guindy ,...
Go to action: end
1 is Storage Locker Facility
Anna Nagar East , Broadway , Chetpet , Egmore , Guindy , T.Nagar , Vadapalani , Purasalwalkam ,...
New step
Step 1 is taken
without conditions
Edit response
Enter a list of options or pull from a variable to generate a dynamic list of options. Learn more
Dynamic
Beta
Add synonyms
Option 1
Bank Working Days
Option 2
List of Branches
Option 3
Storage Locker Facility
Option 4
Currency Conversion Facility
Option 5
Cancel
Apply
Preview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New step
Step 1 is taken
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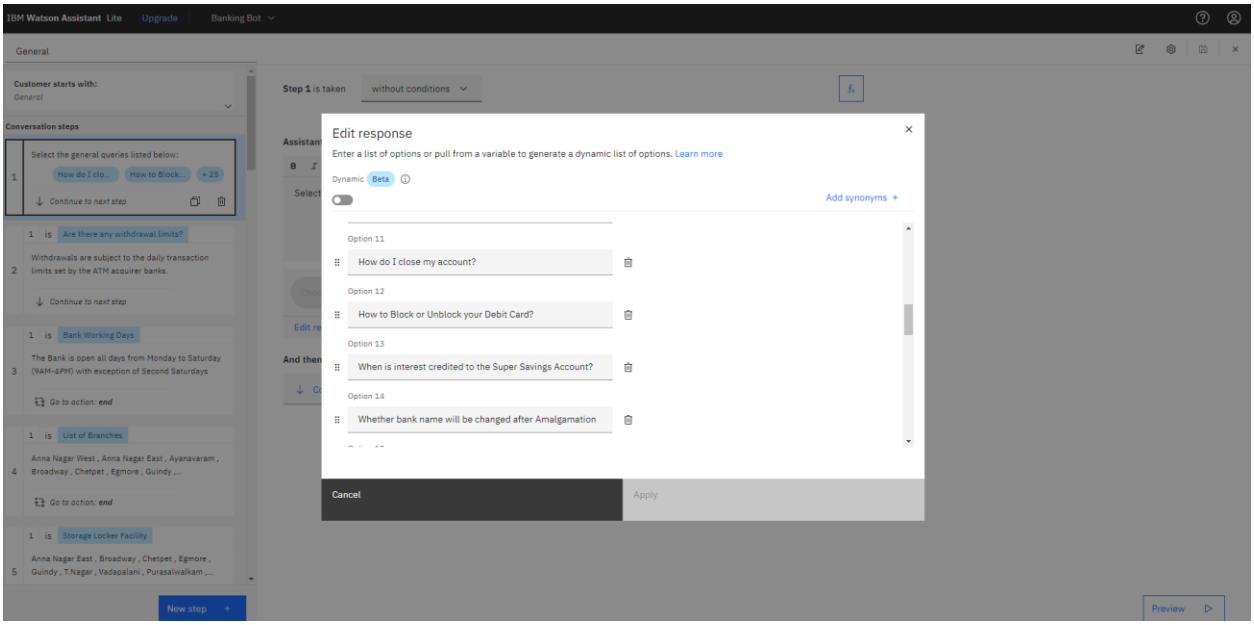
Dynamic
Beta
Add synonyms
Option 6
Minimum Balance for savings account?
Option 7
What is loan grading?
Option 8
What is LOC?
Option 9
What are the different types of loans offered by banks?
Option 10
Cancel
Apply
Preview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New step
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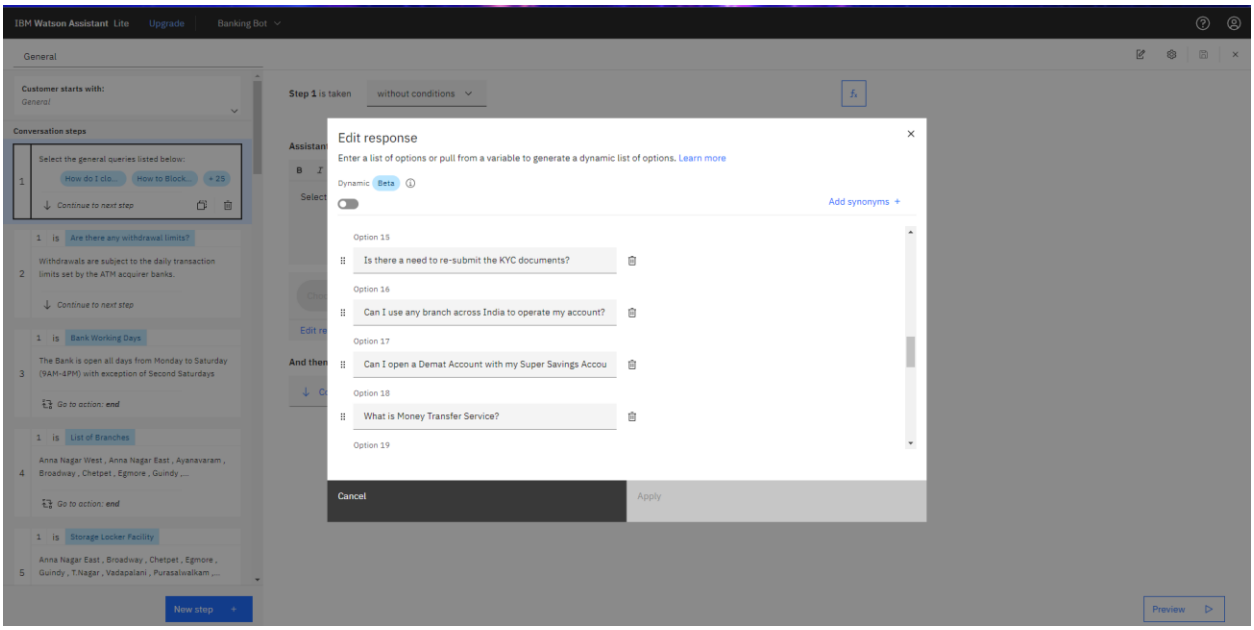
Dynamic
Beta
Add synonyms
Option 11
How do I close my account?
Option 12
How to Block or Unblock your Debit Card?
Option 13
When is interest credited to the Super Savings Account?
Option 14
Whether bank name will be changed after Amalgamation
Cancel
Apply
Preview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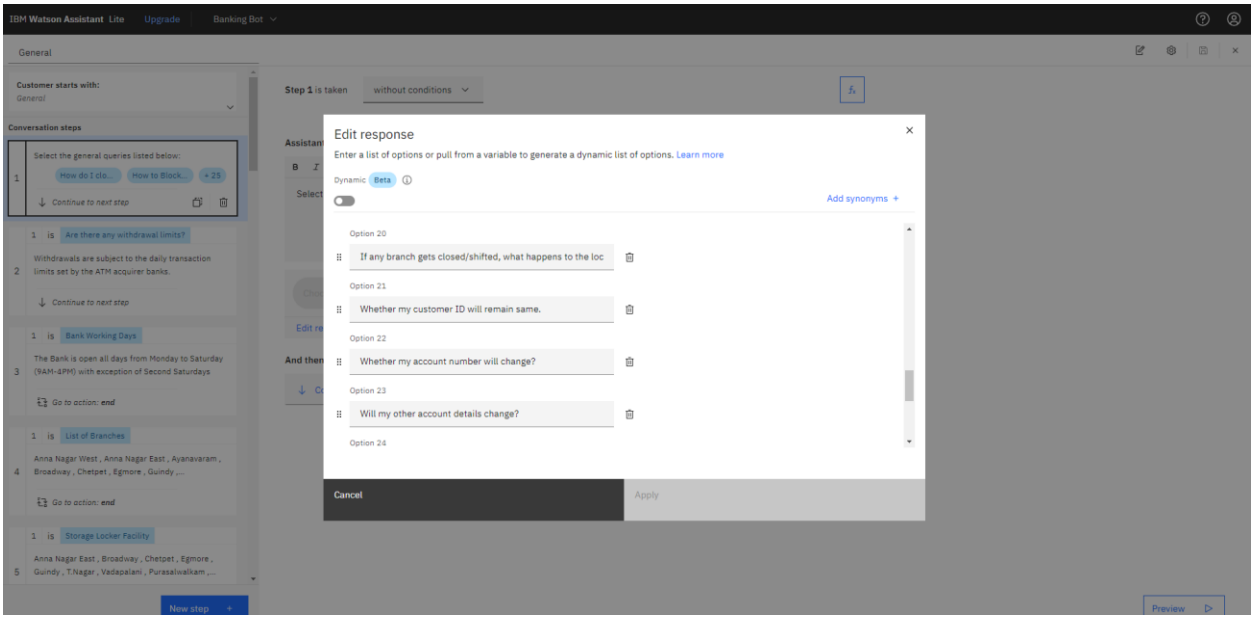
New step
Step 1 is taken
without conditions
Edit response
Enter a list of options or pull from a variable to generate a dynamic list of options. Learn more
Dynamic
Beta
Add synonyms
Option 15
Is there a need to re-submit the KYC documents?
Option 16
Can I use any branch across India to operate my account?
Option 17
Can I open a Demat Account with my Super Savings Accou
Option 18
What is Money Transfer Service?
Option 19
Cancel
Apply
Preview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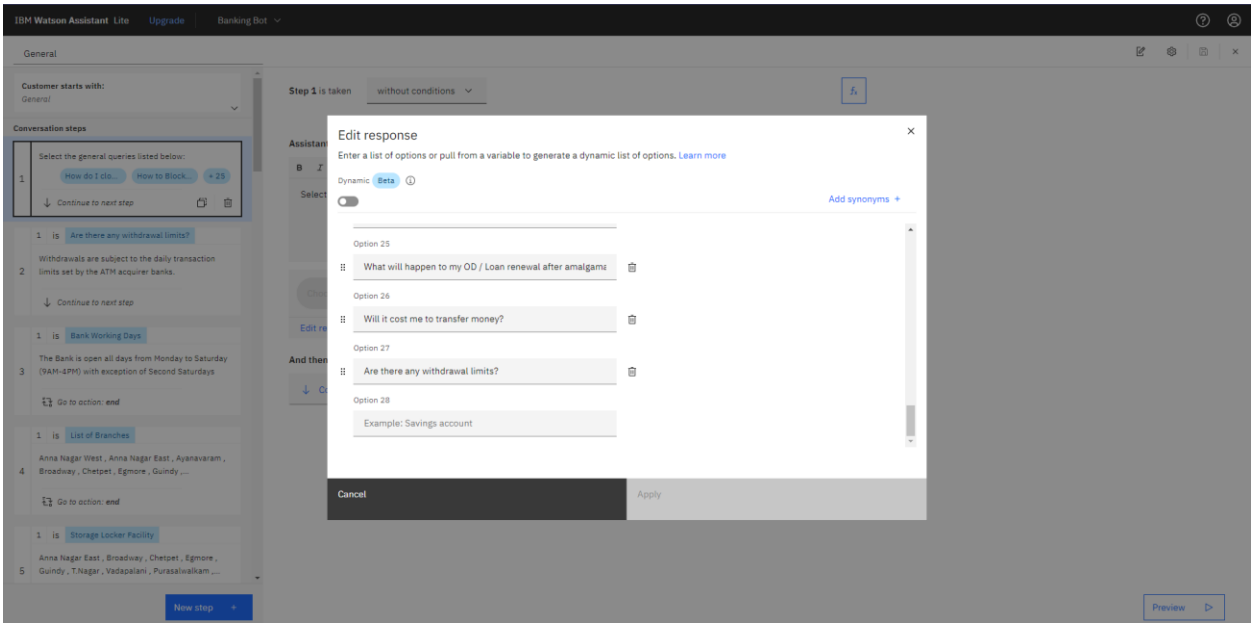
Anna Nagar East , Broadway , Chetpet , Egmore , Guindy , T.Nagar , Vadapalani , Purasaiwalkam ,...
New step
Step 1 is taken
without conditions
Edit response
Enter a list of options or pull from a variable to generate a dynamic list of options. Learn more
Dynamic
Beta
Add synonyms
Option 20
If any branch gets closed/shifted, what happens to the loc
Option 21
Whether my customer ID will remain same.
Option 22
Whether my account number will change?
Option 23
Will my other account details change?
Option 24
Cancel
Apply
Preview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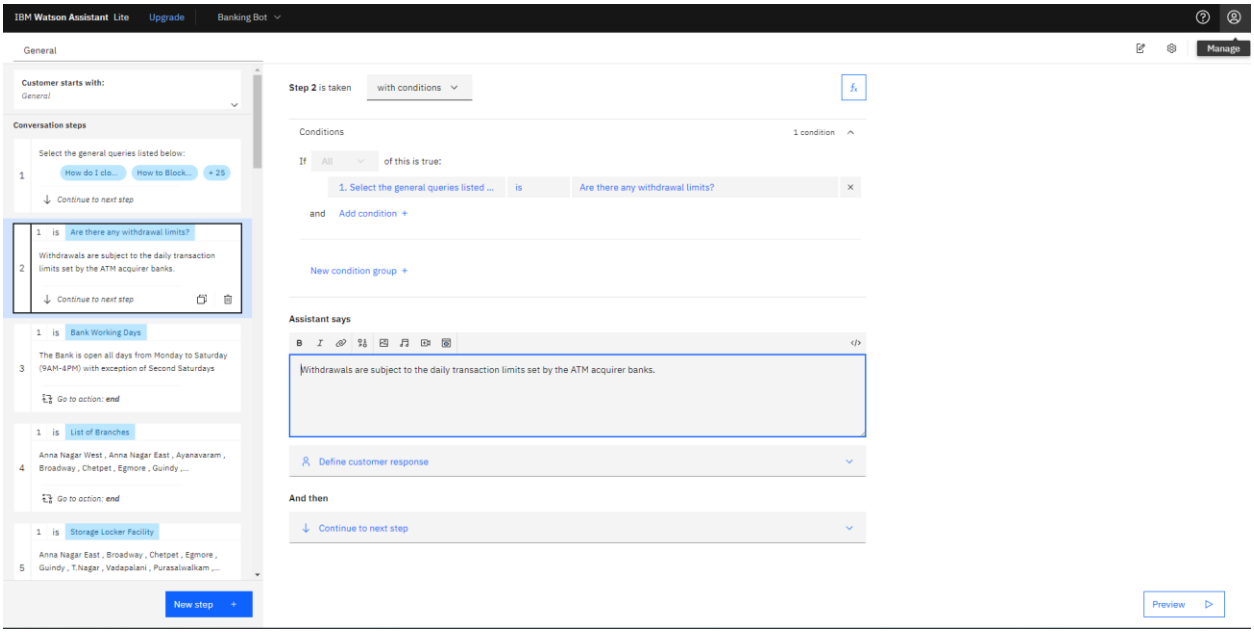
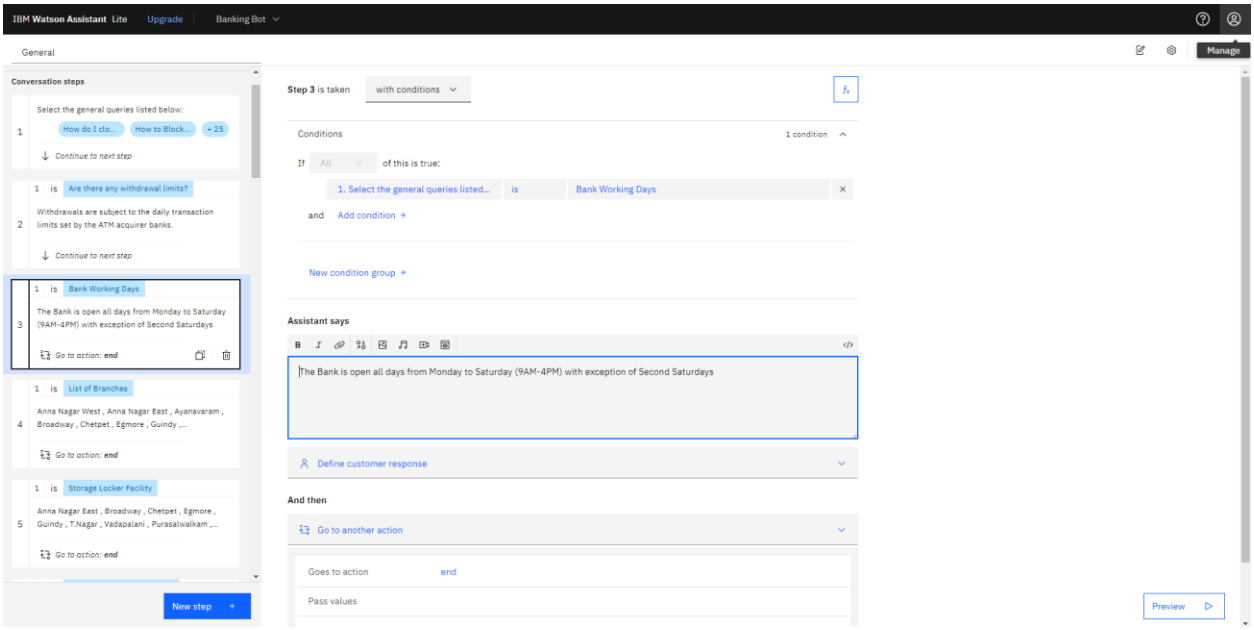
Anna Nagar East , Broadway , Chetpet , Egmore , Guindy , T.Nagar , Vadapalani , Purasaiwalkam ,...
New step
Step 1 is taken
without conditions
Edit response
Enter a list of options or pull from a variable to generate a dynamic list of options. Learn more
Dynamic
Beta
Add synonyms
Option 25
What will happen to my OD / Loan renewal after amalgama
Option 26
Will it cost me to transfer money?
Option 27
Are there any withdrawal limits?
Option 28
Example: Savings account
Cancel
Apply
Preview


IBM Watson Assistant Lite
Upgrade
Banking Bot
Manage
General
Customer starts with:
General
Conversation steps
Select the general queries listed below:
How do I clo...
How to Block...
+ 25
Continue to next step
1 is Are there any withdrawal limits?
Withdrawals are subject to the daily transaction limits set by the ATM acquirer banks.
Continue to next step
1 is Bank Working Days
The Bank is open all days from Monday to Saturday (9AM-4PM) with exception of Second Saturdays
Go to action: end
1 is List of Branches
Anna Nagar West , Anna Nagar East , Ayanavaram , Broadway , Chetpet , Egmore , Guindy ,...
Go to action: end
1 is Storage Locker Facility
Anna Nagar East , Broadway , Chetpet , Egmore , Guindy , T.Nagar , Vadapalani , Purasaiwalkam ,...
New step
Step 2 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Select the general queries listed ...
is
Are there any withdrawal limits?
and
Add condition +
New condition group +
Assistant says
Withdrawals are subject to the daily transaction limits set by the ATM acquirer banks.
Define customer response
And then
Continue to next step
Preview


IBM Watson Assistant Lite
Upgrade
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Manage
General
Conversation steps
Select the general queries listed below:
How do I clo...
How to Block...
+ 25
Continue to next step
1 is Are there any withdrawal limits?
Withdrawals are subject to the daily transaction limits set by the ATM acquirer banks.
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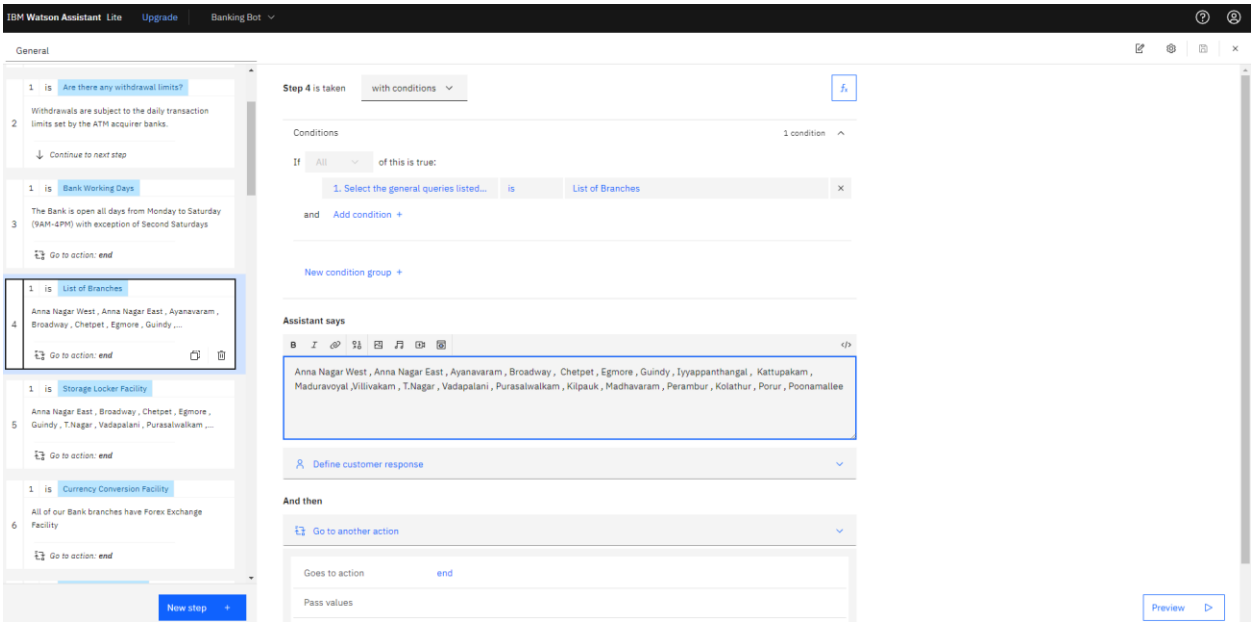
Go to action: end
1 is Storage Locker Facility
Anna Nagar East , Broadway , Chetpet , Egmore , Guindy , T.Nagar , Vadapalani , Purasaiwalkam ,...
Go to action: end
New step
Step 3 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Select the general queries listed...
is
Bank Working Days
and
Add condition +
New condition group +
Assistant says
The Bank is open all days from Monday to Saturday (9AM-4PM) with exception of Second Saturdays
Define customer response
And then
Go to another action
Goes to action
end
Pass values
Preview


IBM Watson Assistant Lite
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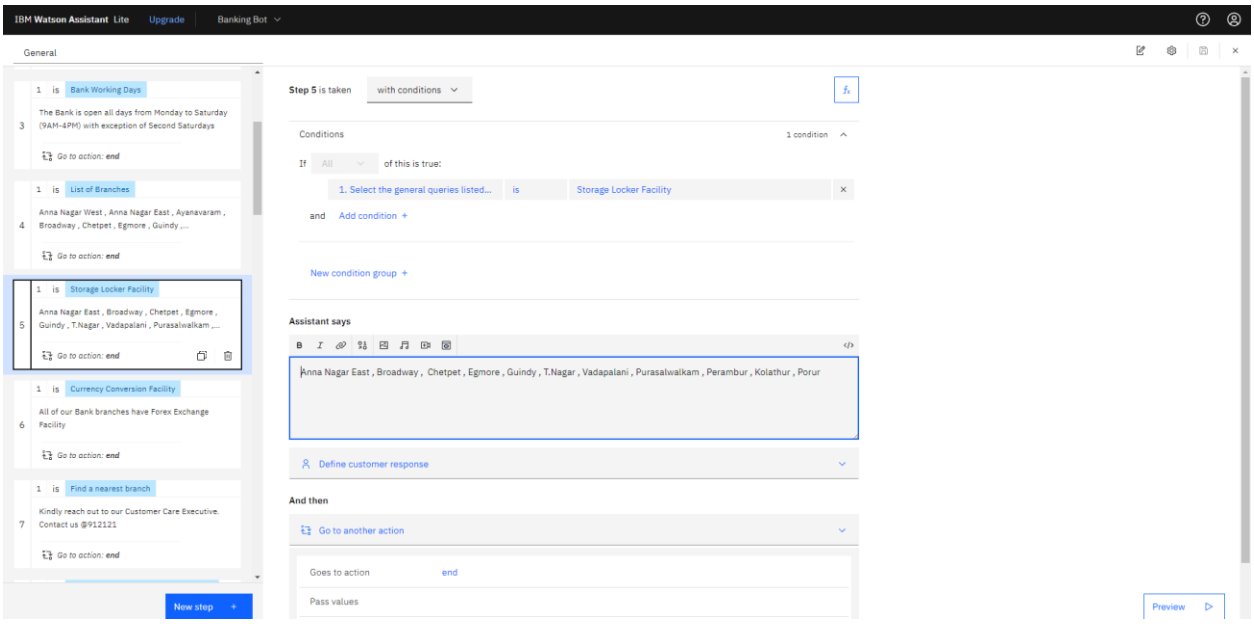
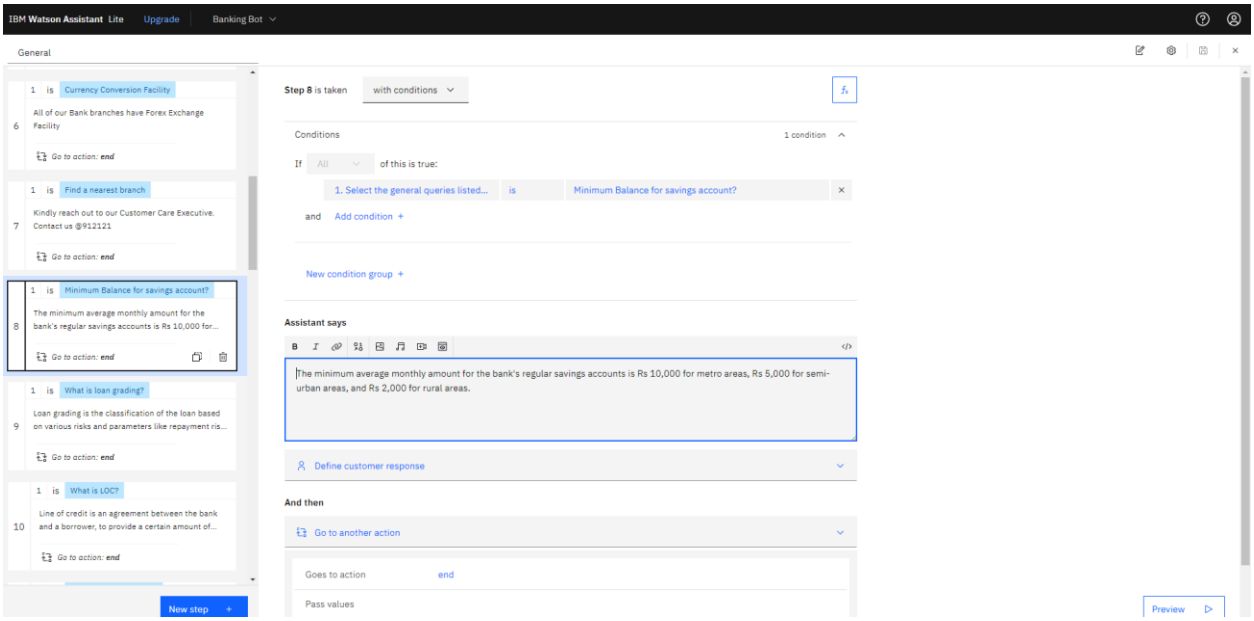
General
1 is Are there any withdrawal limits?
2 Withdrawals are subject to the daily transaction limits set by the ATM acquirer banks.
Continue to next step
1 is Bank Working Days
3 The Bank is open all days from Monday to Saturday (9AM-4PM) with exception of Second Saturdays
Go to action: end
1 is List of Branches
4 Anna Nagar West , Anna Nagar East , Ayanavaram , Broadway , Chetpet , Egmore , Guindy ,...
Go to action: end
1 is Storage Locker Facility
5 Anna Nagar East , Broadway , Chetpet , Egmore , Guindy , T.Nagar , Vadapalani , Purasalwalkam ,...
Go to action: end
1 is Currency Conversion Facility
6 All of our Bank branches have Forex Exchange Facility
Go to action: end
New step
Step 4 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Select the general queries listed...
is
List of Branches
and Add condition +
New condition group +
Assistant says
Anna Nagar West , Anna Nagar East , Ayanavaram , Broadway , Chetpet , Egmore , Guindy , Iyyappanthangal , Kattupakam , Maduravoyal ,Villivakam , T.Nagar , Vadapalani , Purasalwalkam , Kilpauk , Madhavaram , Perambur , Kolathur , Porur , Poonamallee
Define customer response
And then
Go to another action
Goes to action
end
Pass values
Preview


IBM Watson Assistant Lite
Upgrade
Banking Bot
General
1 is Bank Working Days
3 The Bank is open all days from Monday to Saturday (9AM-4PM) with exception of Second Saturdays
Go to action: end
1 is List of Branches
4 Anna Nagar West , Anna Nagar East , Ayanavaram , Broadway , Chetpet , Egmore , Guindy ,...
Go to action: end
1 is Storage Locker Facility
5 Anna Nagar East , Broadway , Chetpet , Egmore , Guindy , T.Nagar , Vadapalani , Purasalwalkam ,...
Go to action: end
1 is Currency Conversion Facility
6 All of our Bank branches have Forex Exchange Facility
Go to action: end
1 is Find a nearest branch
7 Kindly reach out to our Customer Care Executive. Contact us @912121
Go to action: end
New step
Step 5 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Select the general queries listed...
is
Storage Locker Facility
and Add condition +
New condition group +
Assistant says
Anna Nagar East , Broadway , Chetpet , Egmore , Guindy , T.Nagar , Vadapalani , Purasalwalkam , Perambur , Kolathur , Porur
Define customer response
And then
Go to another action
Goes to action
end
Pass values
Preview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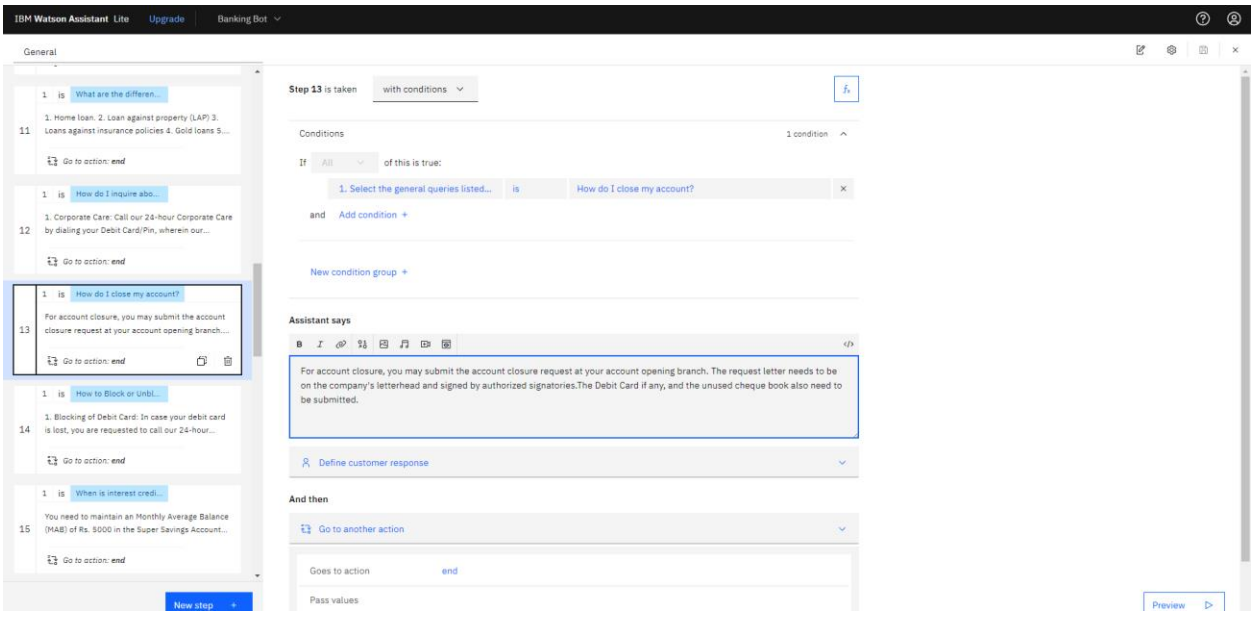
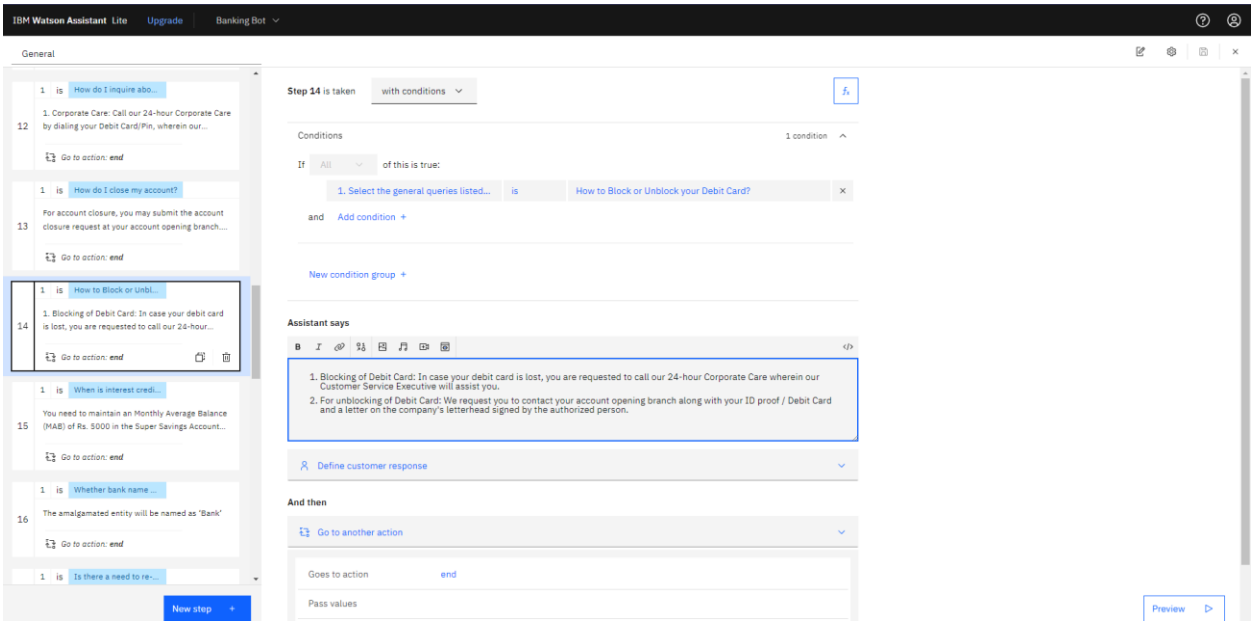
1 is Currency Conversion Facility
All of our Bank branches have Forex Exchange Facility
Go to action: end
1 is Find a nearest branch
Kindly reach out to our Customer Care Executive. Contact us @912121
Go to action: end
1 is Minimum Balance for savings account?
The minimum average monthly amount for the bank's regular savings accounts is Rs 10,000 for...
Go to action: end
1 is What is loan grading?
Loan grading is the classification of the loan based on various risks and parameters like repayment ris...
Go to action: end
1 is What is LOC?
Line of credit is an agreement between the bank and a borrower, to provide a certain amount of...
Go to action: end
New step
Step 8 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Select the general queries listed...
is
Minimum Balance for savings account?
and Add condition +
New condition group +
Assistant says
The minimum average monthly amount for the bank's regular savings accounts is Rs 10,000 for metro areas, Rs 5,000 for semi-urban areas, and Rs 2,000 for rural areas.
Define customer response
And then
Go to another action
Goes to action
end
Pass values
Preview


IBM Watson Assistant Lite
Upgrade
Banking Bot
General
1 is What are the differen...
1. Home loan. 2. Loan against property (LAP) 3. Loans against insurance policies 4. Gold loans 5....
Go to action: end
1 is How do I inquire abo...
1. Corporate Care: Call our 24-hour Corporate Care by dialing your Debit Card/Pin, wherein our...
Go to action: end
1 is How do I close my account?
For account closure, you may submit the account closure request at your account opening branch....
Go to action: end
1 is How to Block or Unbl...
1. Blocking of Debit Card: In case your debit card is lost, you are requested to call our 24-hour...
Go to action: end
1 is When is interest credi...
You need to maintain an Monthly Average Balance (MAB) of Rs. 5000 in the Super Savings Account...
Go to action: end
New step
Step 13 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Select the general queries listed...
is
How do I close my account?
and Add condition +
New condition group +
Assistant says
For account closure, you may submit the account closure request at your account opening branch. The request letter needs to be on the company's letterhead and signed by authorized signatories.The Debit Card if any, and the unused cheque book also need to be submitted.
Define customer response
And then
Go to another action
Goes to action
end
Pass values
Preview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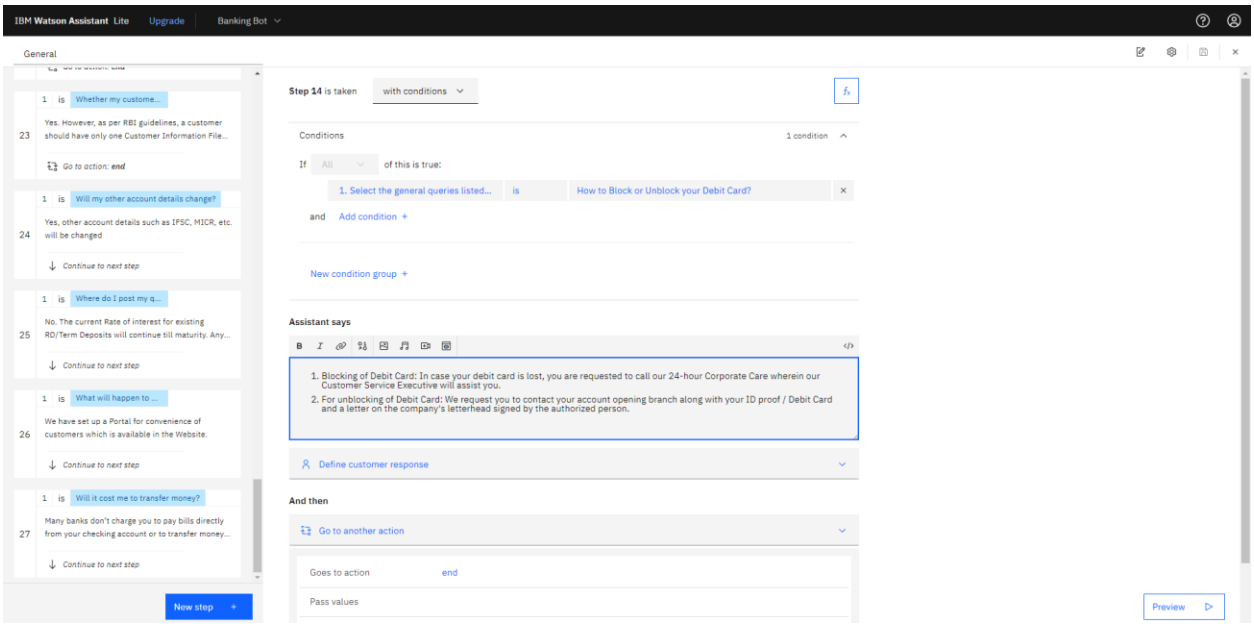
13 1 is How do I close my account? For account closure, you may submit the account closure request at your account opening branch.... Go to action: end
14 1 is How to Block or Unbl... 1. Blocking of Debit Card: In case your debit card is lost, you are requested to call our 24-hour... Go to action: end
15 1 is When is interest credi... You need to maintain an Monthly Average Balance (MAB) of Rs. 5000 in the Super Savings Account... Go to action: end
16 1 is Whether bank name ... The amalgamated entity will be named as 'Bank' Go to action: end
1 is Is there a need to re-...
New step
Step 14 is taken with conditions
Conditions 1 condition
If All of this is true:
1. Select the general queries listed... is How to Block or Unblock your Debit Card?
and Add condition +
New condition group +
Assistant says
1. Blocking of Debit Card: In case your debit card is lost, you are requested to call our 24-hour Corporate Care wherein our Customer Service Executive will assist you.
2. For unblocking of Debit Card: We request you to contact your account opening branch along with your ID proof / Debit Card and a letter on the company's letterhead signed by the authorized person.
Define customer response
And then
Go to another action
Goes to action end
Pass values
Preview


IBM Watson Assistant Lite
Upgrade
Banking Bot
General
23 1 is Whether my custome... Yes. However, as per RBI guidelines, a customer should have only one Customer Information File... Go to action: end
24 1 is Will my other account details change? Yes, other account details such as IFSC, MICR, etc. will be changed Continue to next step
25 1 is Where do I post my q... No. The current Rate of interest for existing RD/Term Deposits will continue till maturity. Any... Continue to next step
26 1 is What will happen to ... We have set up a Portal for convenience of customers which is available in the Website. Continue to next step
27 1 is Will it cost me to transfer money? Many banks don't charge you to pay bills directly from your checking account or to transfer money... Continue to next step
New step
Step 14 is taken with conditions
Conditions 1 condition
If All of this is true:
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New condition group +
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Goes to action end
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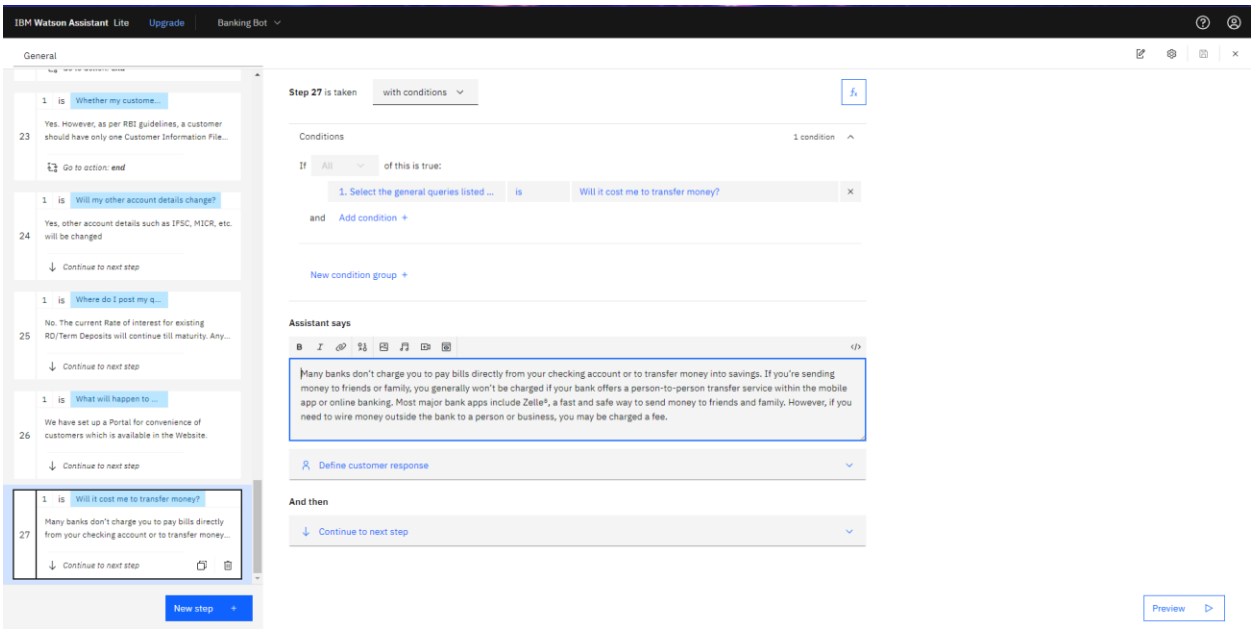
Preview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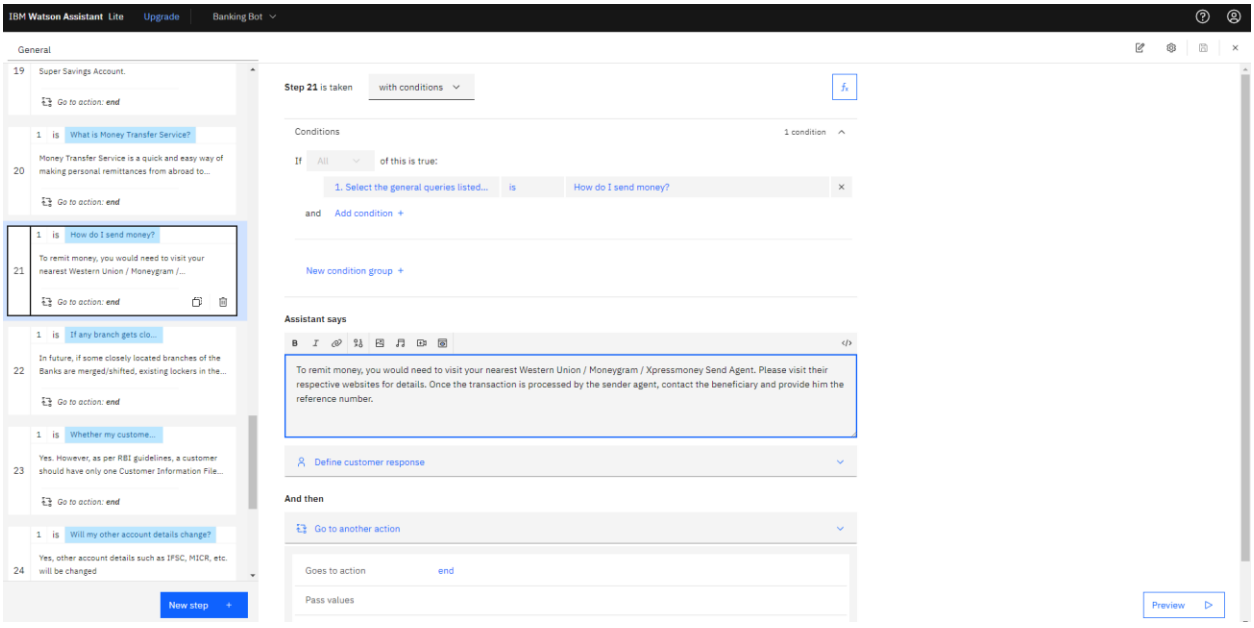
27 1 is Will it cost me to transfer money? Many banks don't charge you to pay bills directly from your checking account or to transfer money... Continue to next step
New step
Step 27 is taken with conditions
Conditions 1 condition
If All of this is true:
1. Select the general queries listed ... is Will it cost me to transfer money?
and Add condition +
New condition group +
Assistant says
Many banks don't charge you to pay bills directly from your checking account or to transfer money into savings. If you're sending money to friends or family, you generally won't be charged if your bank offers a person-to-person transfer service within the mobile app or online banking. Most major bank apps include Zelle®, a fast and safe way to send money to friends and family. However, if you need to wire money outside the bank to a person or business, you may be charged a fee.
Define customer response
And then
Continue to next step
Preview


IBM Watson Assistant Lite
Upgrade
Banking Bot
General
19 Super Savings Account. Go to action: end
20 1 is What is Money Transfer Service? Money Transfer Service is a quick and easy way of making personal remittances from abroad to... Go to action: end
21 1 is How do I send money? To remit money, you would need to visit your nearest Western Union / Moneygram /... Go to action: end
22 1 is If any branch gets clo... In future, if some closely located branches of the Banks are merged/shifted, existing lockers in the... Go to action: end
23 1 is Whether my custome... Yes. However, as per RBI guidelines, a customer should have only one Customer Information File... Go to action: end
24 1 is Will my other account details change? Yes, other account details such as IFSC, MICR, etc. will be changed
New step
Step 21 is taken with conditions
Conditions 1 condition
If All of this is true:
1. Select the general queries listed... is How do I send money?
and Add condition +
New condition group +
Assistant says
To remit money, you would need to visit your nearest Western Union / Moneygram / Xpressmoney Send Agent. Please visit their respective websites for details. Once the transaction is processed by the sender agent, contact the beneficiary and provide him the reference number.
Define customer response
And then
Go to another action
Goes to action end
Pass values
Preview