

AI BASED DISCOURSE FOR BANKING INDUSTRY

Team ID: PNT2022TMID45306

Creating Skills And Assistant For Chatbot:

Chatbot Skills Creation:

The screenshot displays the IBM Watson Assistant interface for creating a chatbot skill. The top navigation bar includes 'IBM Watson Assistant Lite', 'Upgrade', 'Banking Bot', 'Learning center', and user icons. The main workspace is titled 'Savings' and contains two panels.

Left Panel (Skill Editor):

- Customer starts with:** A dropdown menu showing 'Savings'.
- Conversation steps:** A list of steps for the skill.
 - Step 1:** 'Which type of savings account do you want to create?' with options 'Zero balance...', 'Kids savings ...', and '+1'. A 'Continue to next step' button is below.
 - Step 2:** '1 is Regular savings account'. The response is 'Great! Please take the following documents and head towards the nearest branch. 1. Aadhar Card ...'. The action is 'Go to action: End'.
 - Step 3:** '1 is Kids savings account'. The response is 'Awesome! Please take the following documents and head towards the nearest branch. 1. Aadhar Card ...'. The action is 'Go to action: End'.
 - Step 4:** '1 is Zero balance savings account'.
- Bottom:** A 'New step +' button.

Right Panel (Preview):

- Customer starts with:** A section with instructions: '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:** A text input field with 'Enter a phrase' and a 'Total: 1' counter.
- Savings:** A list of phrases entered for this skill, currently empty.
- Bottom:** A 'Preview' button.

Creating Current Account Action :

IBM Watson Assistant LiteUpgradeBanking Bot

Learning center

Current

Customer starts with:
Current account

Conversation steps

What's your company type?

1

PartnershipProprietorship

Continue to next step

1 is Proprietorship

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

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 actionTotal: 2

Enter a phrase

Current

Current account

Preview

Creating Loan Account Action:

IBM Watson Assistant LiteUpgradeBanking Bot

Learning center

loan

Customer starts with:
loan

Conversation steps

What type of loan are you looking at?

1

Top-up loanStudent 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 detail...

2

Go to action: End

1 is Gold loan

Please approach the bank with following documents: 1. Pan Card 2. Aadhar Card 3. Passpor...

3

Go to action: End

1 is Top-up loan

To be eligible for a top-up loan please contact our...

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 actionTotal: 1

Enter a phrase

loan

Preview

Creating General Query Action:

IBM Watson Assistant LiteUpgradeBanking Bot

Learning center

Query

Customer starts with:
Query

Conversation steps

Select the general queries listed below

1 Find a nearest... Bank Workin... + 7

Continue to next step

1 is Bank Working Days

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

Go to action: End

1 is List of Branches

3 6TH AVENUE ANNA NAGAR, A R M BRANCHCHENNAI, ABHIRAMAPURAM,...

Go to action: End

1 is Storage locker facility

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: 1

Enter a phrase

Query

Preview

Creating Net Banking Action:

IBM Watson Assistant LiteUpgradeBanking Bot

Learning center

Net Banking

Customer starts with:
Net Banking

Conversation steps

What queries do you have regarding net banking?

1 is What is Net B... How do I regi... + 2

Continue to next step

1 is What is Net Banking?

The facility offered by the bank allows customers to use banking services over the Internet. Customers...

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?

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

Net Banking

Preview ▶