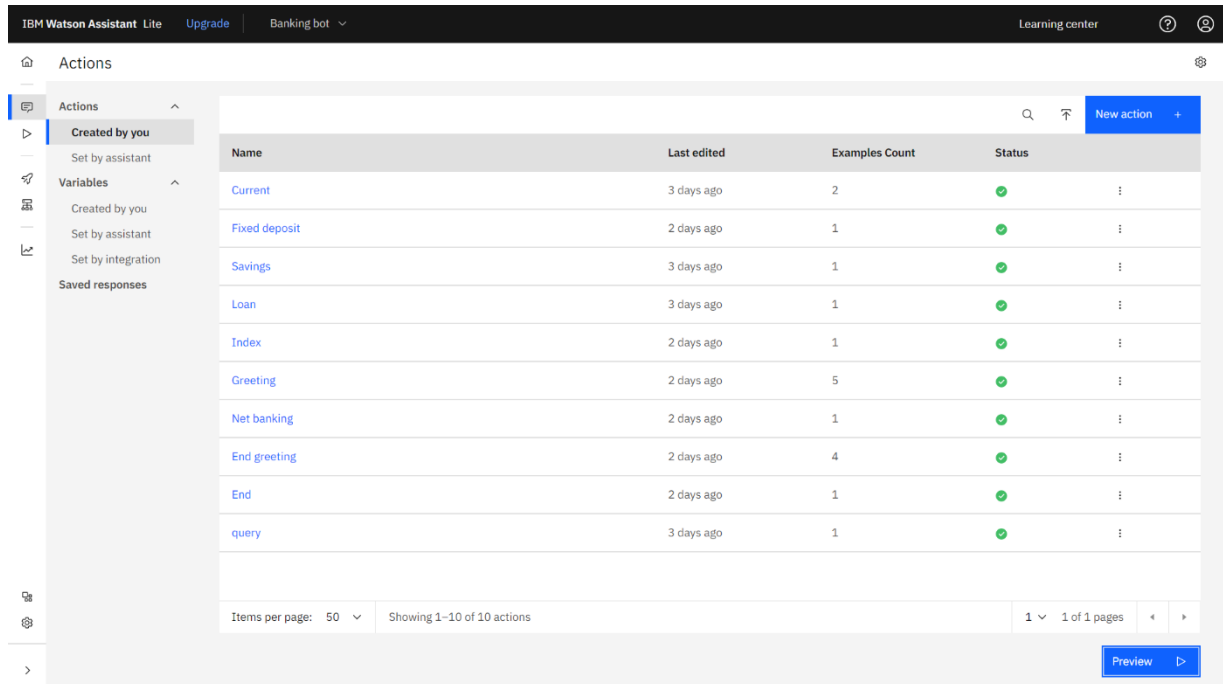


AI BASED DISCOURSE FOR BANKING INDUSTRY

Team ID: PNT2022TMID29862

Creating Skills And Assistant For Chatbot:

Chatbot Skills Creation:

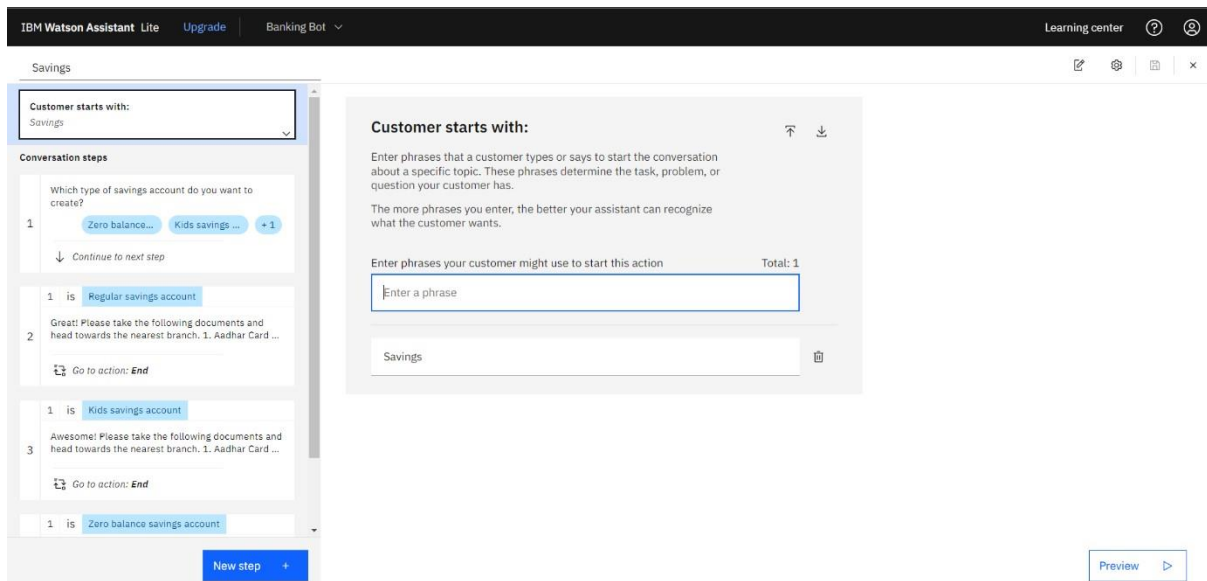


The screenshot shows the IBM Watson Assistant interface for managing actions. The left sidebar contains a menu with 'Actions' selected, and sub-options like 'Created by you', 'Set by assistant', 'Variables', 'Created by you', 'Set by assistant', 'Set by integration', and 'Saved responses'. The main area displays a table of actions.

Name	Last edited	Examples Count	Status	
Current	3 days ago	2	✓	⋮
Fixed deposit	2 days ago	1	✓	⋮
Savings	3 days ago	1	✓	⋮
Loan	3 days ago	1	✓	⋮
Index	2 days ago	1	✓	⋮
Greeting	2 days ago	5	✓	⋮
Net banking	2 days ago	1	✓	⋮
End greeting	2 days ago	4	✓	⋮
End	2 days ago	1	✓	⋮
query	3 days ago	1	✓	⋮

At the bottom, there is a pagination bar showing 'Items per page: 50', 'Showing 1-10 of 10 actions', and '1 of 1 pages'. A 'Preview' button is located at the bottom right.

Creating Saving Account Action:



The screenshot shows the configuration for a 'Savings' action in IBM Watson Assistant. The left sidebar shows the 'Savings' action selected. The main area is divided into two panels.

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

Conversation steps

Which type of savings account do you want to create?

1 is **Regular savings account**

Great! Please take the following documents and head towards the nearest branch. 1. Aadhar Card ...

2 is **Kids savings account**

Awesome! Please take the following documents and head towards the nearest branch. 1. Aadhar Card ...

3 is **Zero balance savings account**

Go to action: **End**

Go to action: **End**

Go to action: **End**

New step +

Preview

Creating Current Account Action:

IBM Watson Assistant Lite Upgrade Banking Bot

Learning center

Current

Customer starts with:
Current account

Conversation steps

1

What's your company type?

Partnership Proprietorship

Continue to next step

1

is Proprietorship

2

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

Go to action: End

1

is Partnership

3

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

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 Bot

Learning center

loan

Customer starts with:
loan

Conversation steps

1

What type of loan are you looking at?

Top-up loan Student loan + 3

Continue to next step

1

is House loan

2

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

Go to action: End

1

is Gold loan

3

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

Go to action: End

1

is Top-up 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: 1

Enter a phrase

loan

Preview

Creating General Query Action:

The screenshot shows the IBM Watson Assistant interface for creating a General Query Action. The top navigation bar includes "IBM Watson Assistant Lite", "Upgrade", "Banking Bot", and "Learning center". The main interface is divided into two panels. The left panel, titled "Query", contains a "Customer starts with:" dropdown menu set to "Query". Below this is a "Conversation steps" section with three steps: 1. "Select the general queries listed below" with buttons "Find a nearest...", "Bank Workin...", and "+ 7"; 2. "1 is Bank Working Days" with a description "The bank is open all days from Monday to Saturday from 9 am to 3 pm ,with exception of 2nd Saturdays." and a "Go to action: End" button; 3. "1 is List of Branches" with a description "6TH AVENUE ANNA NAGAR, A R M BRANCHCHENNAI, ABHIRAMAPURAM,..." and a "Go to action: End" button. A "New step +" button is at the bottom. The right panel, titled "Customer starts with:", contains instructions on how to enter phrases and a "Total: 1" counter. It has an "Enter a phrase" input field and a "Query" input field with a trash icon. A "Preview" button is at the bottom right.

Creating Net Banking Action:

The screenshot shows the IBM Watson Assistant interface for creating a Net Banking Action. The top navigation bar includes "IBM Watson Assistant Lite", "Upgrade", "Banking Bot", and "Learning center". The main interface is divided into two panels. The left panel, titled "Net Banking", contains a "Customer starts with:" dropdown menu set to "Net Banking". Below this is a "Conversation steps" section with four steps: 1. "What queries do you have regarding net banking?" with buttons "What is Net B...", "How do I regi...", and "+ 2"; 2. "1 is What is Net Banking?" with a description "The facility offered by the bank allows customers to use banking services over the Internet. Customers..." and a "Go to action: End" button; 3. "1 is How do I register for Net Banking ?" with a description "Please download and fill up the net banking requisition form and submit it to your home branch" and a "Go to action: End" button; 4. "1 is What are the features of Net Banking?" with a description "Check the account statement online 2. Open a...". A "New step +" button is at the bottom. The right panel, titled "Customer starts with:", contains instructions on how to enter phrases and a "Total: 1" counter. It has an "Enter a phrase" input field and a "Net Banking" input field with a trash icon. A "Preview" button is at the bottom right.