

## Project Development Phase

### Delivery of Sprint - 3

Date	01 November 2022
Team ID	PNT2022TMID29862
Project Name	AI-based discourse for Banking Industry

### Creating Loan Account Action

Loan action is created with the necessary steps.

The screenshot shows the IBM Watson Assistant interface for creating a new action named 'loan'. The top navigation bar includes 'IBM Watson Assistant Lite', 'Upgrade', 'Banking Bot', and 'Learning center'. The main workspace is divided into two panels. The left panel, titled 'loan', shows the 'Conversation steps' section with a list of steps: 1. 'What type of loan are you looking at?' with options 'Top-up loan', 'Student loan', and '+ 3'. Below this is a 'Continue to next step' button. 2. '1 is House loan' followed by a description: 'To be eligible for a house loan please contact our bank service providers with all existing loan detail...'. Below this is a 'Go to action: End' button. 3. '1 is Gold loan' followed by a description: 'Please approach the bank with following documents. 1. Pan Card 2. Aadhar Card 3. Passport...'. Below this is a 'Go to action: End' button. 4. '1 is Top-up loan' followed by a description: 'To be eligible for a top-up loan please contact our...'. Below this is a 'Go to action: End' button. A 'New step +' button is at the bottom. The right panel, titled 'Customer starts with:', shows a text input field for 'Enter a phrase' and a 'Total: 1' indicator. Below this is a 'Preview' button.

### Creating General Query Action

General query action is created with the necessary steps.

The screenshot shows the IBM Watson Assistant interface for creating a new action named 'Query'. The top navigation bar includes 'IBM Watson Assistant Lite', 'Upgrade', 'Banking Bot', and 'Learning center'. The main workspace is divided into two panels. The left panel, titled 'Query', shows the 'Conversation steps' section with a list of steps: 1. 'Select the general queries listed below' with options 'Find a nearest...', 'Bank Working...', and '+ 7'. Below this is a 'Continue to next step' button. 2. '1 is Bank Working Days' followed by a description: 'The bank is open all days from Monday to Saturday from 9 am to 3 pm, with exception of 2nd Saturdays'. Below this is a 'Go to action: End' button. 3. '1 is List of Branches' followed by a description: '6TH AVENUE ANNA NAGAR, A R M BRANCHCHENNAI, ABHIRAMAPURAM,...'. Below this is a 'Go to action: End' button. 4. '1 is Storage locker facility' followed by a description: 'A R M BRANCHCHENNAI, ABHIRAMAPURAM,...'. Below this is a 'Go to action: End' button. A 'New step +' button is at the bottom. The right panel, titled 'Customer starts with:', shows a text input field for 'Enter a phrase' and a 'Total: 1' indicator. Below this is a 'Preview' button.

## Creating Net Banking Action

Net banking action is created with the necessary steps.

IBM Watson Assistant | Life | Upgrade | Banking Bot | Learning center

Net Banking

Customer starts with:  
Net Banking

Conversation steps

1. What queries do you have regarding net banking?  
1. is What is Net B... How do I regi... + 2  
Continue to next step

2. The facility offered by the bank allows customers to use banking services over the Internet. Customers...  
1. is What is Net Banking?  
Go to action: End

3. Please download and fill up the net banking requisition form and submit it to your home branch  
1. is How do I register for Net Banking?  
Go to action: End

4. Check the account statement online 2. Open a...

1. is What are the features of Net Banking?

New step +

Preview

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

In addition to this greeting, end greeting , index and end actions are also created.

IBM Watson Assistant | Life | Upgrade | Banking bot | Learning center

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

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	✓

Items per page: 50 Showing 1–10 of 10 actions

1 1 of 1 pages

Preview

## PREVIEW OF CHATBOT:

<https://web-chat.global.assistant.watson.appdomain.cloud/preview.html?backgroundImageURL=https%3A%2F%2Fus-south.assistant.watson.cloud.ibm.com%2Fpublic%2Fimages%2Fupx-e81248c6-9605-415f-843b-666356f451ec%3A%3Adc31b5e0-fc40-4536-ac27-1850d4fc9937&integrationID=1206a417-c053-4bee-a810-037a99f37b2a&region=us-south&serviceInstanceID=e81248c6-9605-415f-843b-666356f451ec>



**Note:** No code for this project. So, I attached the screenshot and step to build it.