

Project Development

Phase Sprint 2

Date	04 November 2022
Team ID	PNT2022TMID00318
Project Name	AI Based Discourse for Banking Industry

Create Actions For Chatbot Assistant

Creation of Actions for Banking Chatbot Assistant:

To implement AI Based Discourse for Banking Industry, we need an IBM

Service. The Service used is **IBM WATSON ASSISTANT**.

ACTION CREATED
1)SAVING ACCOUNT ACTION
2)CURRENT ACCOUNT ACTION
3)LOAN ACCOUNT ACTION
4)GENERAL QUERY ACTION
5)NET BANKING ACTION

Created actions:

IBM Watson Assistant LiteUpgradeAI based discou...?

Actions

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
Greeting	2 hours ago	5	✓
Current	2 hours ago	2	✓
Net Banking	35 minutes ago	1	✓
End	an hour ago	1	✓
Index	an hour ago	1	✓
Enquiry	2 hours ago	1	✓
Savings	36 minutes ago	1	✓
End Greeting	an hour ago	7	✓

Items per page: 50Showing 1–10 of 10 actions11 of 1 pages

Preview

Previewing assistant:

IBM Watson Assistant LiteUpgradeAI based discou...?

Actions

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

Name	Last edited	Examples Count
Greeting	2 hours ago	5
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Net Banking	35 minutes ago	1
End	an hour ago	1
Index	an hour ago	1
Enquiry	2 hours ago	1
Savings	36 minutes ago	1
End Greeting	an hour ago	7

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

Preview

Greeting recognized

Welcome!!! Good to see you.

go to Index

How can I help you?

Select an option

Savings Account

Current Account

Loan Enquiry

General Query

Net Banking

Type something...

Preview of Savings:

IBM Watson Assistant Lite Upgrade AI based discou...

Savings

Customer starts with: Savings

Conversation steps

- 1 What type of Savings account do you want to create?
Kids Savings ... Regular Savi... +1
Continue to next step
- 1 is Regular Savings Account
Great! Please take the following documents and head towards the nearest branch.
2 Tr Free text
Go to action: End
- 1 is Kids Savings Account
Great! Please take the following documents and head towards the nearest branch.
3 Tr Free text
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

Savings

Preview

go to Index

How can I help you?

Savings Account

Savings Account

go to Savings

Whic type of Savings account do you want to create?

Regular Savings Account

Kids Savings Account

Zero Balance Savings Account

Type something...

Preview of Loan:

Loan

Customer starts with: loan

Conversation steps

- 1 What type of loan your looking for?
Housing loan Education loan +3
Continue to next step
- 1 is Housing loan
To be eligible for housing loan contact our branch manager with all required documents regarding yo...
2 Tr Free text
Go to action: End
- 1 is Personal loan
Regarding your personal loan you must get your account details with all personal documents like...
3 Tr Free text
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

loan

Preview

Loan Enquiry

go to Loan

What type of loan your looking for?

Select an option

Housing loan

Vehicle loan

Education loan

Personal loan

Gold loan

Type something...

Preview of current:

The screenshot displays the IBM Watson Assistant interface for a conversation named 'Current'. On the left, the 'Conversation steps' panel shows a sequence of three steps. Step 1 asks 'What's your company type?' with buttons for 'Partnership' and 'Proprietorship'. Step 2 asks for documents to approach a nearby branch, with a 'Free text' input. Step 3 asks for documents to approach a nearby branch, also with a 'Free text' input. A 'New step' button is at the bottom. The central panel, 'Customer starts with:', provides instructions on how to start a conversation and a list of phrases: 'Current' and 'Current Account'. The right panel, 'Preview', shows a simulated chat interface where a user says 'Current Account' and the assistant responds with 'Welcome!!! Good to see you.' and 'How can I help you?'.

Preview of general query:

The screenshot displays the IBM Watson Assistant interface for a conversation named 'General Query'. The top bar shows 'IBM Watson Assistant Lite' and 'Upgrade' options. The 'Conversation steps' panel on the left shows three steps. Step 1 asks the user to select a general query from a list: 'locker facility...', 'List of branches...', and '+2'. Step 2 asks for documents to check the bank's working days, with a 'Free text' input. Step 3 asks for documents to check the CIBIL score, with a 'Free text' input. A 'New step' button is at the bottom. The central panel, 'Customer starts with:', provides instructions on how to start a conversation and a list of phrases: 'general query'. The right panel, 'Preview', shows a simulated chat interface where a user says 'General Query' and the assistant responds with 'Welcome!!! Good to see you.' and 'How can I help you?'. The preview also shows a list of general queries: 'Bank working days', 'List of branches', 'CIBIL score', and 'locker facility available'.

Preview of net banking:

IBM Watson Assistant Lite Upgrade AI based discou... ?

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?

Net banking is a service provided by banks that allows customers to access banking services onlin...

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 in your home branch.

3

Go to action: End

1 is What are the features of Net Banking?

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

How can I help you?

Net Banking

Net Banking

go to Net Banking

What queries do you have regarding Net Banking?

What is Net Banking?

How do i register for Net Banking?

What are the features of Net Banking?

Facing errors in Net Banking

Type something...

IBM Watson Assistant interface showing a conversation flow for a banking chatbot. The interface includes a sidebar with conversation steps, a main workspace for defining the assistant's responses, and a preview window on the right.

Conversation Steps:

- Step 1: General Query (This step has no content)
- Step 2: General Query (This step has no content) - **Selected**
- Step 3: Net Banking (This step has no content)
- Step 4: Loan Account (This step has no content)
- Step 5: How can I help you? (This step has no content)

Assistant says:

For example: What size do you want to order?

And then:

Continue to next step

Preview:

How can I help you?

General Query

go to General Query

GENERAL CUSTOMER QUERIES

Select an option

- How to change/update the mobile...
- How to change/update the mailin...
- I am a NRE customer want to upd...
- Are there any charges for non mail...
- Kyc Documents

Type something...

IBM Watson Assistant interface showing a conversation flow for a banking chatbot. The interface includes a sidebar with conversation steps, a main workspace for defining the assistant's responses, and a preview window on the right.

Conversation Steps:

- Step 1: General Query (This step has no content)
- Step 2: General Query (This step has no content) - **Selected**
- Step 3: Net Banking (This step has no content)
- Step 4: Loan Account (This step has no content)
- Step 5: How can I help you? (This step has no content)

Assistant says:

For example: What size do you want to order?

And then:

Continue to next step

Preview:

How can I help you?

General Query

go to General Query

GENERAL CUSTOMER QUERIES

Kyc Documents

Kyc Documents

AADHAR CARD

PAN CARD

VOTER ID

DRIVING LICENSE

go to End

Do you want to know some other services?

Yes No

Type something...

IBM Watson Assistant

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F7c0eb589a18846ebaf0860ef9363b8c...

IBM Watson Assistant Lite Upgrade Banking ChatBot Learning center

Index

Customer starts with:
Index

Conversation steps

5 Is General Query

1 This step has no content
Go to action: General Query

2 This step has no content
Continue to next step

3 5 Is Net Banking

3 This step has no content
Go to action: NetBanking

4 5 Is Loan Account

4 This step has no content
Go to action: Loan

5 How can I help you?

Loan Account General Query + 3

Continue to next step

New step +

Step 2 is taken without conditions

Assistant says

For example: What size do you want to order?

Define customer response

And then

Continue to next step

Preview

Kyc Documents

AADHAR CARD

PAN CARD

VOTER ID

DRIVING LICENSE

go to End

Do you want to know some other services?

Yes No

No

Thank you. Have a nice day!!!

There are no additional steps for this action.
Add a new step or end the action.

Greeting ended

Type something...

Type here to search

27°C Cloudy 21:07 04-11-2022