

# PROJECT DEVELOPMENT PHASE

## SPRINT - 3

Date	05 November 2022
Team ID	PNT2022TMID48901
Project Name	AI Based Discourse for Banking Industry

### Creating Loan Account Action :

The screenshot displays the IBM Watson Assistant interface for configuring a 'Loan' action. The interface is divided into a left sidebar and a main workspace.

**Left Sidebar:**

- Loan** (selected)
- 1 is **Topup Loan**  
To be eligible for a top-up loan Please contact our bank service providers with all existing loan...  
4  
Free text  
Go to action: **Thank you!**
- 1 is **Vehicle Loan**  
Kindly approach the bank with following Documents..  
5  
Free text  
Go to action: **Thank you!**
- 1 is **Education Loan**  
Kindly approach the bank with following Documents..  
6  
New step +

**Main Workspace:**

- Step 2 is taken** with conditions
- Conditions** 1 condition
- If **All** of this is true:
  - 1. What type ... is **House Loan**
  - and Add condition +
  - New condition group +
- Assistant says**  
To be eligible for a house loan Please contact our bank service providers with all existing loan details  
Preview

The bottom of the interface shows a taskbar with several open PDF files: 'Create Current Acc...', 'Create Current Acc...', and 'Create Savings Acc...'. The system tray at the bottom right indicates the time is 16:00 on 06-11-2022.

The screenshot displays the IBM Watson Assistant interface. At the top, the browser address bar shows the URL: `au-syd.assistant.watson.cloud.ibm.com/crn%3Aav1%3Abluemix%3Apublic%3Acon%3Aaau-syd%3Aa%2F5738b489432d41d487becf5dd0d4f9b4%3A18...`. The interface is divided into several sections:

- Header:** Includes "IBM Watson Assistant Lite", "Upgrade", "Banking Bot", and "Learning center".
- Left Sidebar:**
  - Loan:** The selected topic.
  - Customer starts with:** A dropdown menu showing "Loan".
  - Conversation steps:** A list of steps in the conversation. Step 1 is "What type of loan are you looking at?" with options "Gold Loan", "Education Lo...", and "+ 3". Step 2 is "To be eligible for a house loan Please contact our bank service providers with all existing loan..." with a "Free text" input.
  - New step:** A button to add a new step.
- Main Chat Area:**
  - 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." and "The more phrases you enter, the better your assistant can recognize what the customer wants." It includes a "Total: 1" counter and a "Enter a phrase" input field.
  - Input:** The word "Loan" is entered in the input field.
- Bottom Bar:**
  - Document Thumbnails:** Three thumbnails for "Create Current Acc...", "Create Current Acc...", and "Create Savings Acc..." are visible.
  - Search Bar:** A search bar with the text "Type here to search".
  - System Tray:** Shows the time as 16:00 on 06-11-2022 and various system icons.

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

### Actions

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

Name	Last edited	Count
Thank you!	36 minutes ago	6
Saving	an hour ago	4
Loan	6 minutes ago	1
Index	4 minutes ago	1
Current	38 minutes ago	2
Create an account	2 hours ago	19

Items per page: 50 Showing 1-6 of 6 actions

Preview

Loan Queries

go to Loan

What type of loan are you looking at?

House Loan

House Loan

To be eligible for a house loan Please contact our bank service providers with all existing loan details

Use the up arrow for prior messages

Create Current Acc...pdf Create Current Acc...pdf Create Savings Acc...pdf Show all

Type here to search 16:04 06-11-2022

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

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Name	Last edited	Count
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Preview

What type of loan are you looking at?

Vehicle Loan

Vehicle Loan

Kindly approach the bank with following Documents.

1.Automobile Invoice

2.Pan Card

3.Income tax returns of last 3 years

Use the up arrow for prior messages

Create Current Acc...pdf Create Current Acc...pdf Create Savings Acc...pdf Show all

Type here to search 16:04 06-11-2022

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Preview

What type of loan are you looking at?

Gold Loan

Gold Loan

Please approach the bank with following Documents.

1.Aadhar card

2.Pan card

3.Passport Size Photos

Use the up arrow for prior messages

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Preview

go to Thank you!

You're welcome!

Let me know if any other services I can do..

Yes No

No

Greet customer ended

Type something...

Create Current Acc...pdf Create Current Acc...pdf Create Savings Acc...pdf Show all

Type here to search

**Note :** Attached preview contents of Loan account bot.