

SPRINT - 3

DATE - 11-11-2022

TEAM ID - PNT2022TMID35574

Bot Preview -

<https://web-chat.global.assistant.watson.appdomain.cloud/preview.html?backgroundImageUrl=https%3A%2F%2Fjp-tok.assistant.watson.cloud.ibm.com%2Fpublic%2Fimages%2Fupx-c585c117-6510-48bf-9178-8794b910a068%3A%3Abed6e781-c735-493f-96f9-df3fcea6ee0&integrationID=8efaa521-4fa1-4eb0-9c87-bebf773af467®ion=jp-tok&serviceInstanceId=c585c117-6510-48bf-9178-8794b910a068>

Integration with third-party apps

SMS with Twilio Draft

Close Next

Get started

Account SID

Auth token

Phone number

Webhook URI

Get started

With Twilio, your assistant is ready to send and receive SMS and MMS text messages. [Learn more](#)

This integration can even pair with [phone calls](#), enabling your assistant to send and receive texts with a caller.

Steps to setting up Twilio Messaging

1. Get a Twilio phone number with SMS capabilities (MMS optional). In Twilio, set your phone number's messaging to configure with webhooks, which should be its default.
2. Enter your Twilio account SID and authentication token.
3. Copy and paste this webhook identifier as the address for incoming messages. Make sure it's set to HTTP POST.

Adding few more training phases for Loan 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?

Student loan Gold loan + 3

Continue to next step

1 is House loan

List of papers/ documents applicable to all applicants: - Employer Identity Card - Loan...

Free text

Go to action: End

1 is Gold loan

The following are the documents which are necessary for processing your loan.. - Application...

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: 4

Enter a phrase

new loan account

loan account

Create a Loan account

Loan

Preview

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Loan

Go to action: End

1 is Vehicle loan

These are the following documents required: 1. 2 passport size photographs of borrower/guarantor(...

Free text

Go to action: End

1 is Student loan

Checklist of Documents to be submitted along-with duly filled Loan Application Form - Mark sheet of...

Free text

Go to action: End

1 is Personal Loan

- Application form duly filled by the borrower and submitted along with 2 Latest Passport size...

Free text

Go to action: End

New step

Step 7 is taken with conditions

Conditions

1 condition

If All of this is true:

1. What type of loan... is Personal Loan

and Add condition

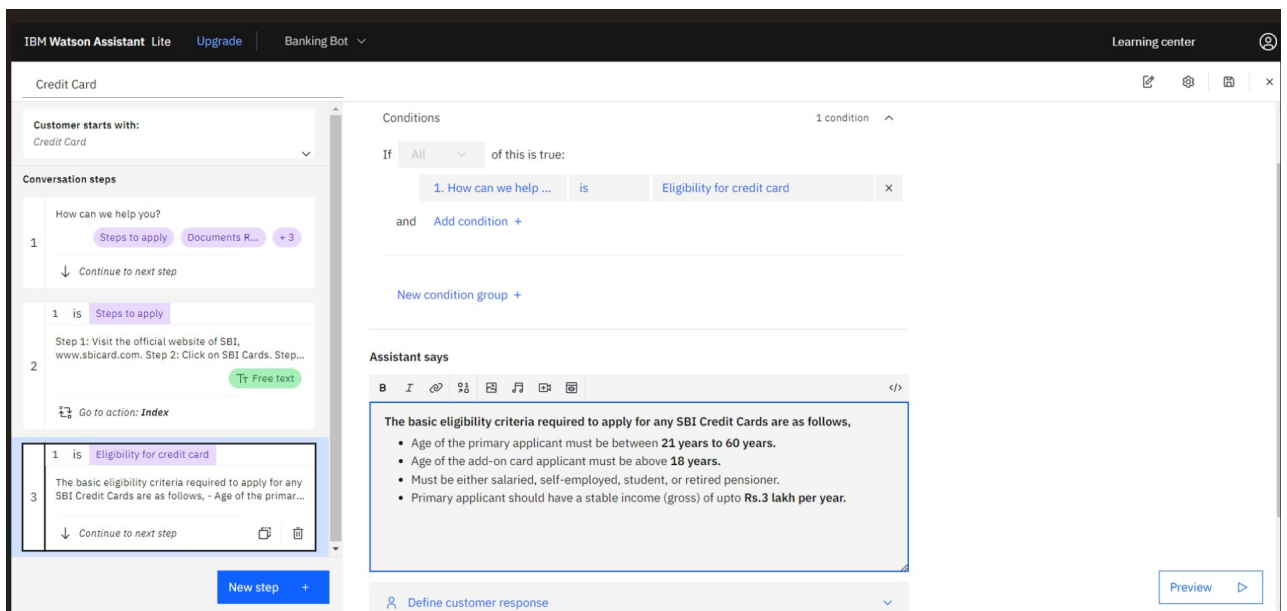
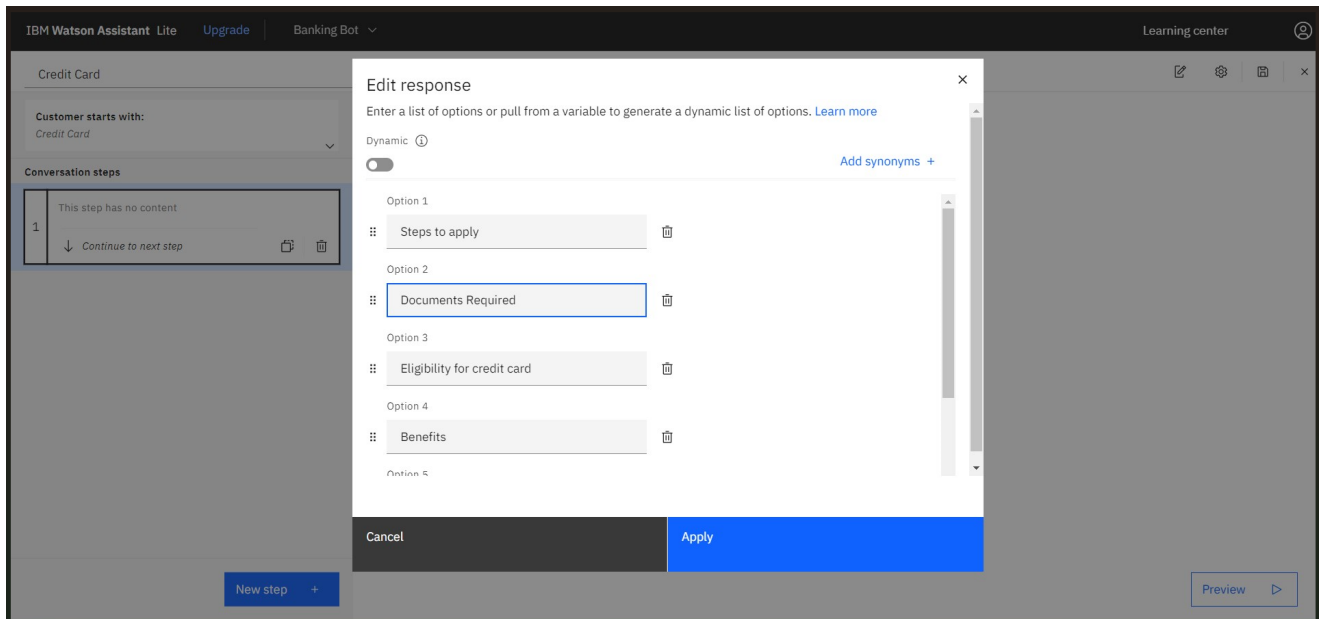
New condition group

Assistant says

- Application form duly filled by the borrower and submitted along with 2 Latest Passport size photographs.
- Proof of identity (Photocopies of PAN/Passport/Driver's License, Voter ID card/ Aadhar Card)
- Proof of Residence (photo copies of recent Telephone Bills/ Electricity Bill/Property tax receipt/ Passport/ Voters ID card)
- Copy of identity card issued by the employer.
- Latest six months' Bank Statement of the account where salary is credited.

Preview

Adding new intent - Credit Card Action.



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Credit Card

Copy of self-attested UID/Aadhaar card Copy of self-attested current residence address proof Duly...

4

Free text

Go to action: Index

1 is Benefits

Lower Interest Option Encash Money Simplified - Simple measures to provide you instant cash with...

5

Free text

Go to action: Index

1 is Credit Limit

Credit Limit and Cash Limit are assigned to Cardholders based on internal SBICPSL credit...

6

Continue to next step

1 is Overlimit Transaction

Approval of Overlimit transaction is subject to internal policy and eligibility w.r.t transaction and...

7

New step +

New condition group +

Assistant says

B I [icons]

- Approval of Overlimit transaction is subject to internal policy and eligibility w.r.t transaction and customer profile.
- Overlimit Transactions are subject to overlimit fee. Please refer to Most Important Terms and Conditions (MITC) document for details.
- Overlimit Transaction consent will automatically allow all the cards under the account to avail overlimit facility.
- Upon disabling the Overlimit facility, the Overlimit fee levied will not be reversed, if Overlimit utilization has already been done.
- Amount allowed for Overlimit transaction is at the discretion of SBI Card.
- Overlimit transaction is different from Temporary Credit Limit usage.
- Overlimit consent will allow evaluation of Overlimit transactions done by Customer. In absence of the consent, all Overlimit transactions will be declined due to insufficient credit limit.

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Define customer response

Preview

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Index

Go to action: Current

1 is Loan Enquiry

4

This step has no content

Go to action: Loan

1 is General Query

5

This step has no content

Go to action: Query

1 is Net Banking

6

This step has no content

Go to action: Net Banking

1 is Savings Account

7

This step has no content

Continue to next step

New step +

Conditions

1 condition

If All of this is true:

1. Hello. Greetings! ... is Savings Account

defined

and Add condition +

New condition group +

Assistant says

B I [icons]

For example: What type of transfer would you like

</>

Define customer response

Preview