

# Creating Skills & Assistant For Chatbot

## Creating Loan Account Action

Team ID:PNT2022TMID45005

Project Name:AI Based Discourse for Banking Industry

### Created Screen Shots

The screenshot shows the IBM Watson Assistant interface for a project named 'Banking chatbot'. The 'Actions' tab is selected, displaying a list of actions created by the user. The table has the following data:

Name	Last edited	Examples Count	Status
Current	15 days ago	2	✓
Index	15 days ago	1	✓
Query	a day ago	1	✓
Savings	15 days ago	1	✓
Net Banking	15 days ago	1	✓
Loan	15 days ago	1	✓
Greeting	15 days ago	4	✓

The interface also includes a sidebar with navigation options: 'Actions', 'Variables', and 'Saved responses'. The 'Actions' section is expanded, showing 'Created by you', 'Set by assistant', and 'Set by integration'. The 'Saved responses' section is also visible. The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 21:07 on 11/18/2022.

IBM Watson Assistant Lite Upgrade Banking chatbot Learning center

Loan

Customer starts with:  
Loan

Conversation steps

1 what type of loan are you looking at?  
Gold loan Student loan +3  
Continue to next step

1 is House loan  
To be eligible for a house loan please contact our bank service providers with all existing loan...  
Go to action: End

1 is Gold loan  
please approach the bank with the following documents.

3

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

Loan

Connecting...

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Loan

Customer starts with:  
Loan

Conversation steps

1 what type of loan are you looking at?  
Gold loan Student loan +3  
Continue to next step

1 is House loan  
To be eligible for a house loan please contact our bank service providers with all existing loan...  
Go to action: End

1 is Gold loan  
please approach the bank with the following documents.

3

New step +

Preview

Step 1 is taken without conditions

Assistant says

what type of loan are you looking at?

Choose an option

Edit response Edit validation

And then

Continue to next step

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Loan

Conversation steps

1 what type of loan are you looking at?

Gold 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...

Go to action: End

1 is Gold loan

3 please approach the bank with the following documents.

Go to action: End

Conditions

1 condition

If All of this is true:

1. what type o... 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.

Define customer response

Preview

New step +

IBM Watson Assistant Lite Upgrade Banking chatbot Learning center

Loan

Conversation steps

1 what type of loan are you looking at?

Gold 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...

Go to action: End

1 is Gold loan

3 please approach the bank with the following documents.

Go to action: End

Conditions

1 condition

If All of this is true:

1. what type o... 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.

Define customer response

And then

Go to another action

Goes to action End

Pass values

Upon return Continue

Edit settings Edit passed values

Screenshot saved

The screenshot was added to your OneDrive.

OneDrive

New step +

IBM Watson Assistant Lite Upgrade Banking chatbot Learning center

Loan

1 is House loan

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

Go to action: End

1 is Gold loan

3 please approach the bank with the following documents.

Go to action: End

1 is Topup loan

4 To be eligible for a top-up loan please contact our bank service providers with all existing loan...

Go to action: End

New step +

Step 3 is taken with conditions

Conditions 1 condition

If All of this is true:

1. what type o... is Gold loan

and Add condition +

New condition group +

Assistant says

please approach the bank with the following documents.

1. Pan card

2. Aadhar card

3. Passport size photo

Screenshot saved  
The screenshot was added to your OneDrive.

IBM Watson Assistant Lite Upgrade Banking chatbot Learning center

Loan

1 is House loan

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

Go to action: End

1 is Gold loan

3 please approach the bank with the following documents.

Go to action: End

1 is Topup loan

4 To be eligible for a top-up loan please contact our bank service providers with all existing loan...

Go to action: End

New step +

Define customer response

And then

Go to another action

Goes to action End

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

IBM Watson Assistant Lite Upgrade Banking chatbot Learning center

Loan

1 is Gold loan

3 please approach the bank with the following documents.

Go to action: End

1 is Topup loan

4 To be eligible for a top-up loan please contact our bank service providers with all existing loan...

Go to action: End

1 is Vehicle loan

5 Kindly approach the bank with the following documents.

Go to action: End

Conditions 1 condition

If All of this is true:

1. what type o... is Topup loan

and Add condition +

New condition group +

Assistant says

To be eligible for a top-up loan please contact our bank service providers with all existing loan details.

Define customer response

Preview

IBM Watson Assistant Lite Upgrade Banking chatbot Learning center

Loan

Go to action: End

1 is Topup loan

4 To be eligible for a top-up loan please contact our bank service providers with all existing loan...

Go to action: End

1 is Vehicle loan

5 Kindly approach the bank with the following documents.

Go to action: End

1 is Student loan

6 please approach the bank with the following documents.

Go to action: End

Conditions 1 condition

If All of this is true:

1. what type o... is Vehicle loan

and Add condition +

New condition group +

Assistant says

Kindly approach the bank with the following documents.

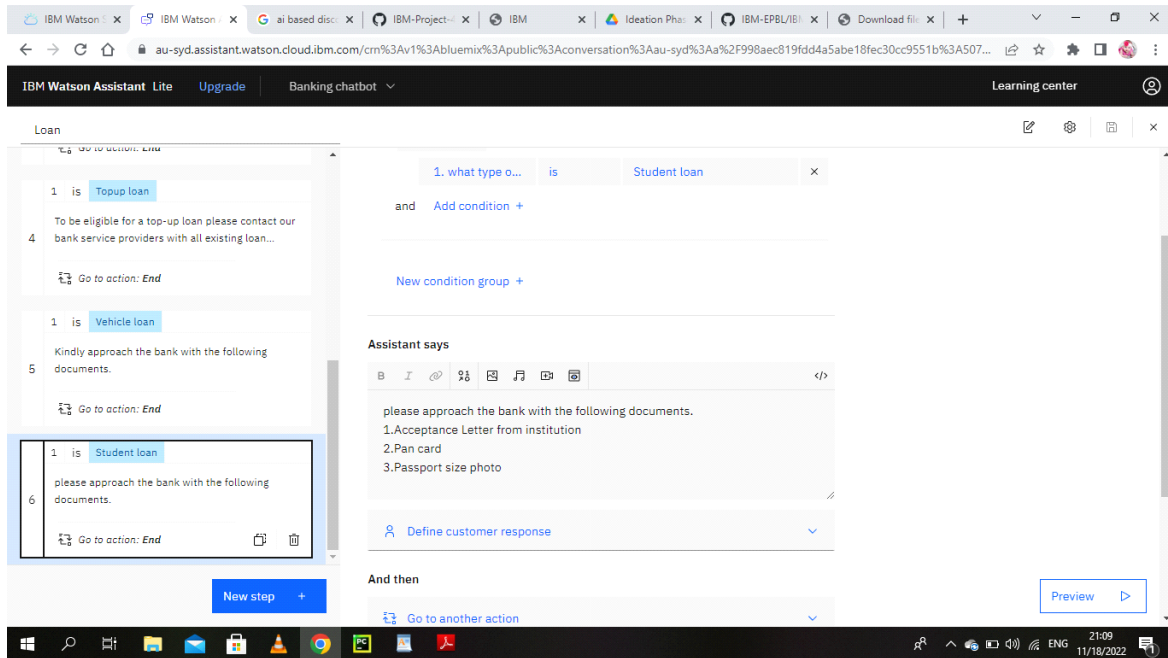
1. Automobile Invoice

2. Pan card

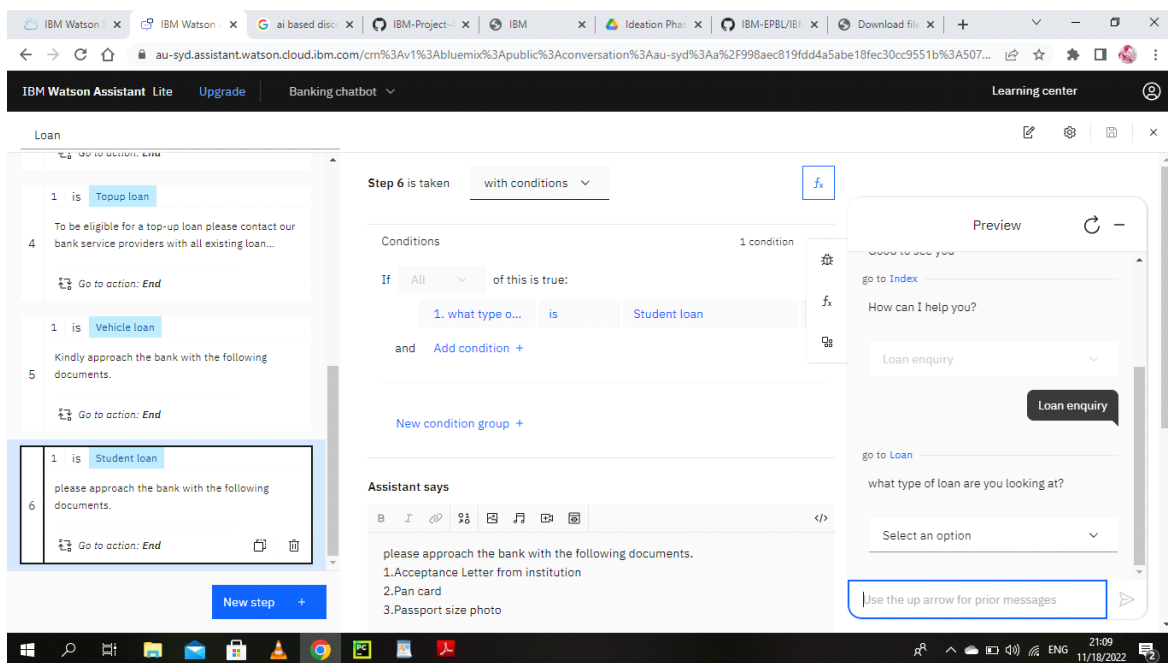
3. Income Tax Returns for the last three years

Define customer response

Preview



## Output Screen Shots



IBM Watson Assistant LiteUpgradeBanking chatbotLearning center

Loan

1 is Topup loan

To be eligible for a top-up loan please contact our bank service providers with all existing loan...

4

Go to action: End

1 is Vehicle loan

Kindly approach the bank with the following documents.

5

Go to action: End

1 is Student loan

please approach the bank with the following documents.

6

Go to action: End

Step 6 is taken with conditions

Conditions1 condition

IfAll of this is true:

1. what type o... is Student loan

andAdd condition +

New condition group +

Assistant says

please approach the bank with the following documents.

1.Acceptance Letter from institution

2.Pan card

3.Passport size photo

Preview

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.

go to End

Do you want know about some other services?

YesNo

Type something...

New step +

21:10

11/18/2022