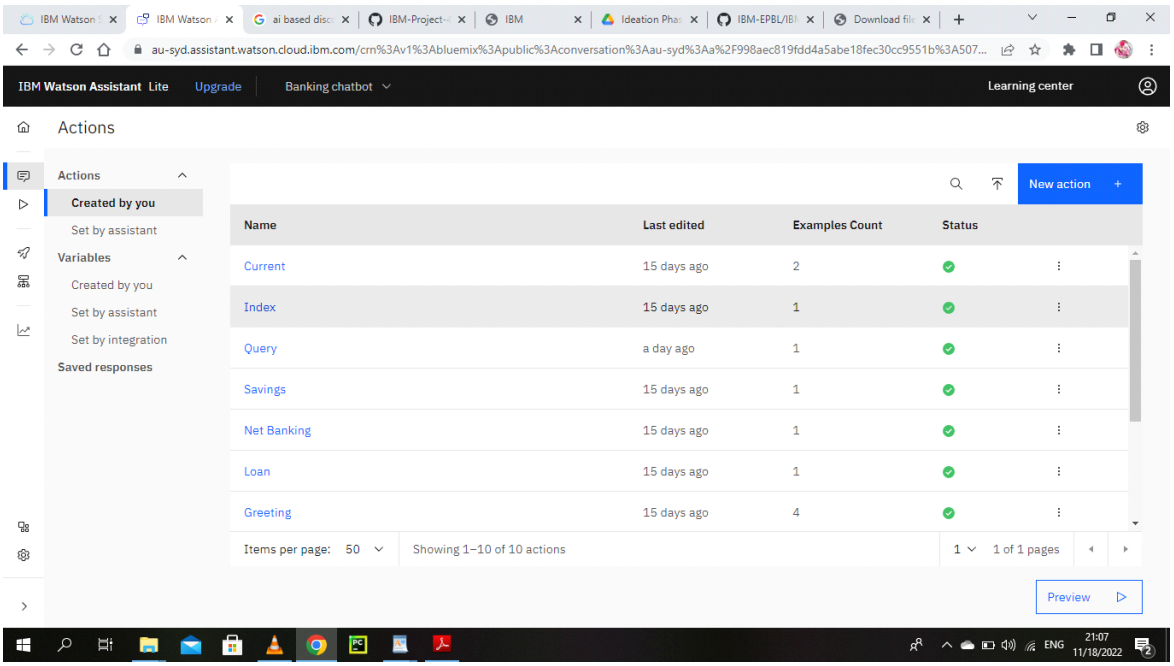
Creating Skills & Assistant For Chatbot

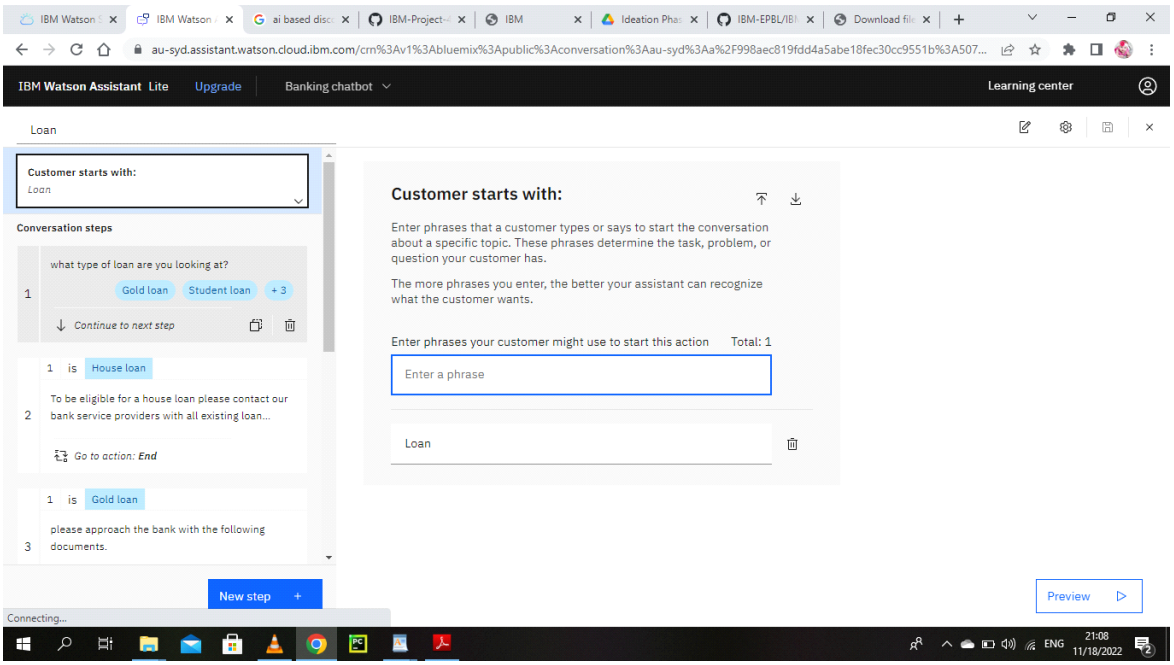
Creating Loan Account Action

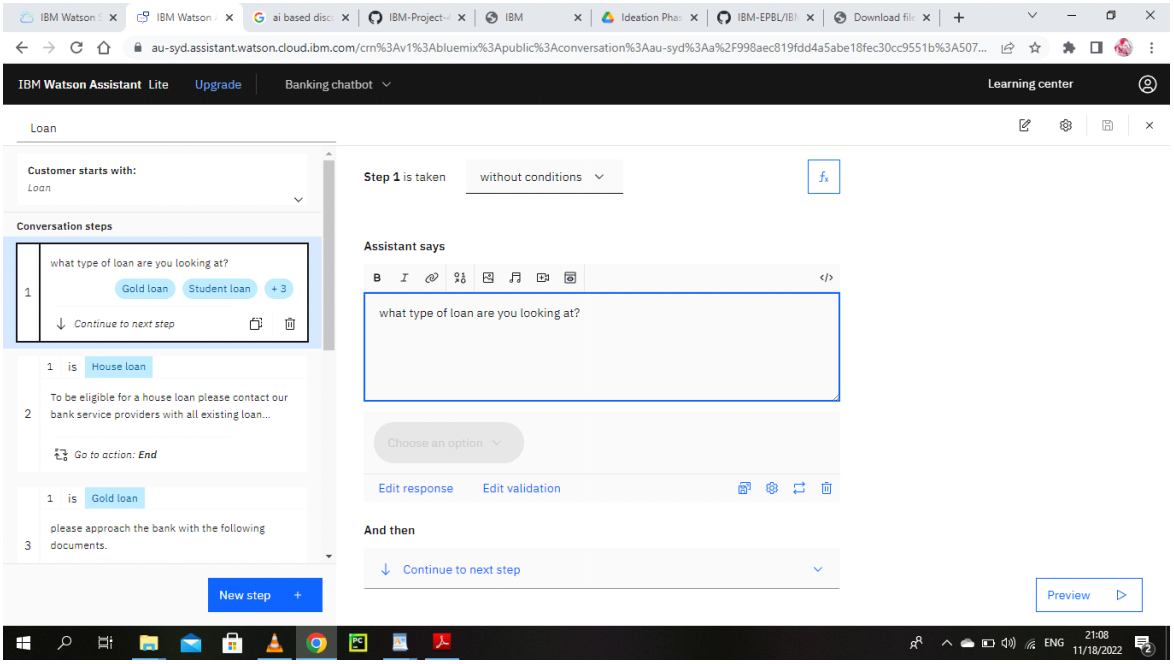
Team ID:PNT2022TMID45005

Project Name:AI Based Discourse for Banking Industry

Created Screen Shots




IBM Watson Assistant Lite
Upgrade
Banking chatbot
Learning center
Loan
Customer starts with:
Loan
Conversation steps
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.
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
Connecting...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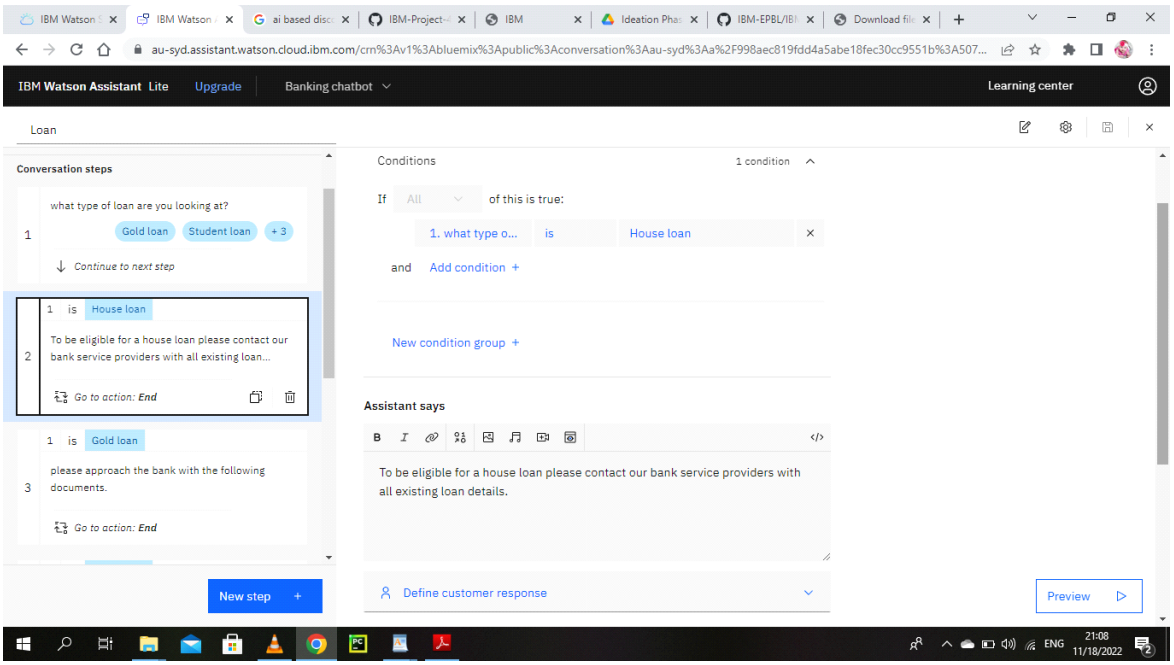
Loan
Customer starts with:
Loan
Conversation steps
what type of loan are you looking at?
Gold loan
Student loan
+ 3
Continue to next step
1 is House loan
To be eligible for a house loan please contact our bank service providers with all existing loan...
Go to action: End
1 is Gold loan
please approach the bank with the following documents.
New step
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
Preview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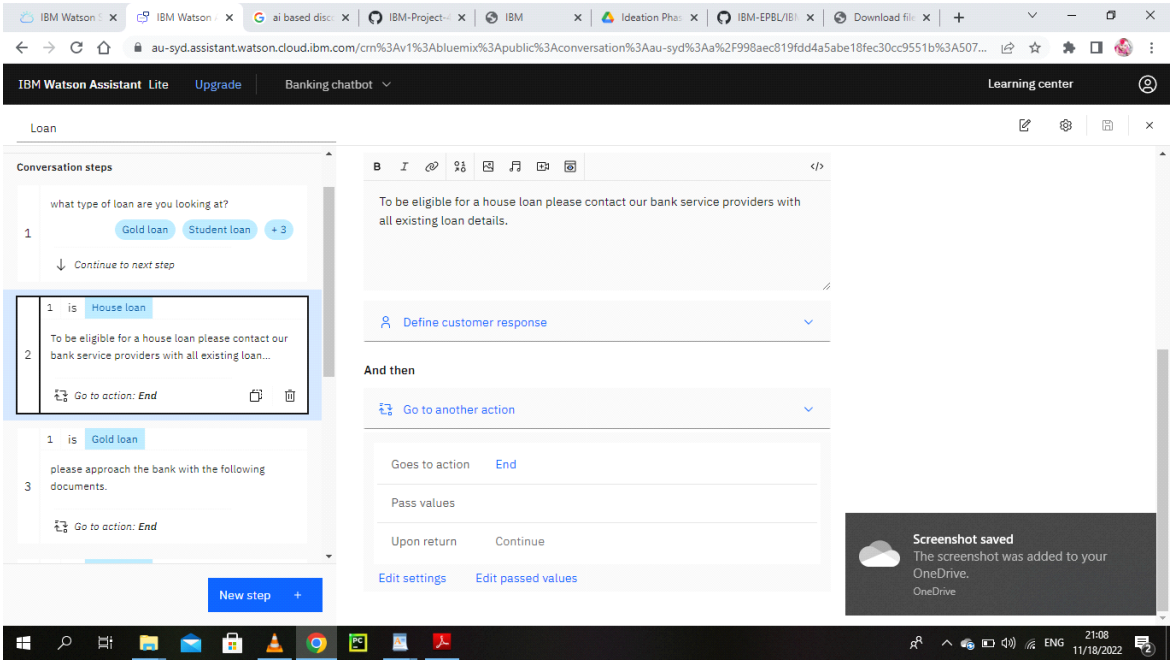
Learning center
Loan
Conversation steps
what type of loan are you looking at?
Gold loan
Student loan
+ 3
Continue to next step
1 is House loan
To be eligible for a house loan please contact our bank service providers with all existing loan...
Go to action: End
1 is Gold loan
please approach the bank with the following documents.
Go to action: End
New step
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


IBM Watson Assistant Lite
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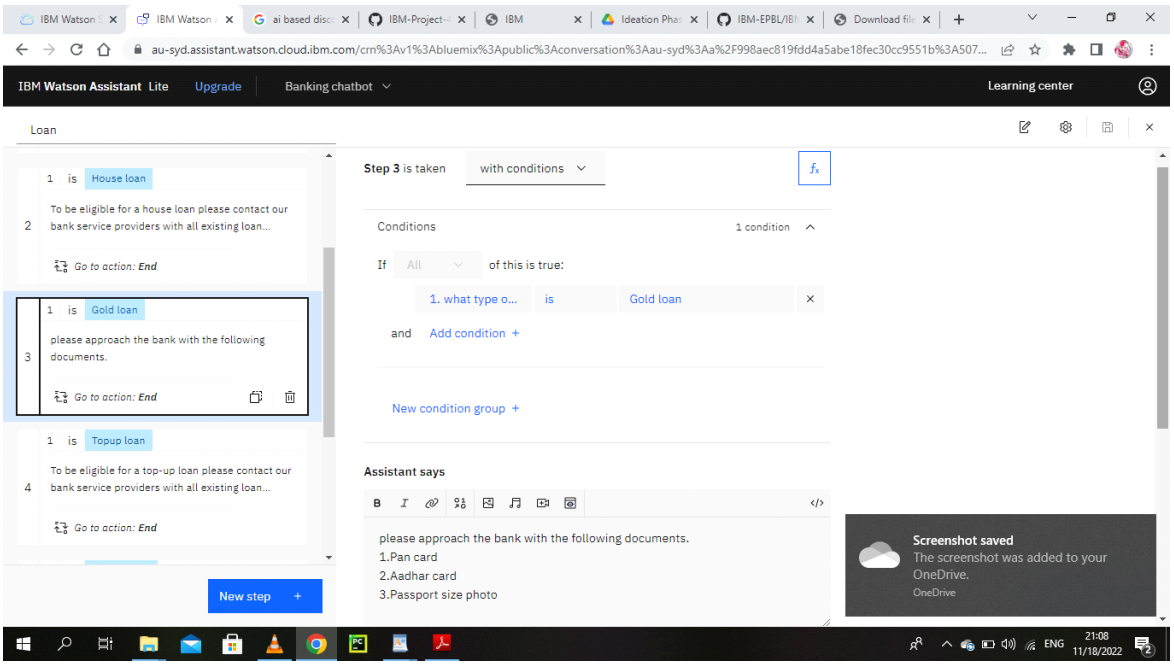
Loan
Conversation steps
what type of loan are you looking at?
Gold loan
Student loan
+ 3
Continue to next step
1 is House loan
To be eligible for a house loan please contact our bank service providers with all existing loan...
Go to action: End
1 is Gold loan
please approach the bank with the following documents.
Go to action: End
New step
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


IBM Watson Assistant Lite
Upgrade
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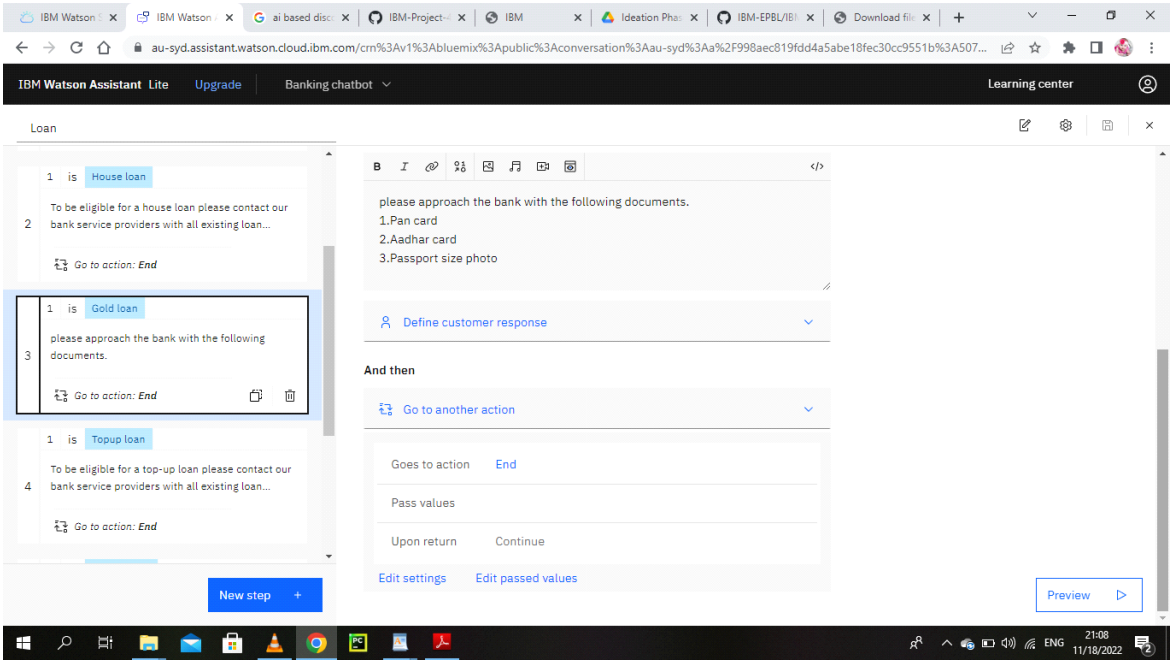
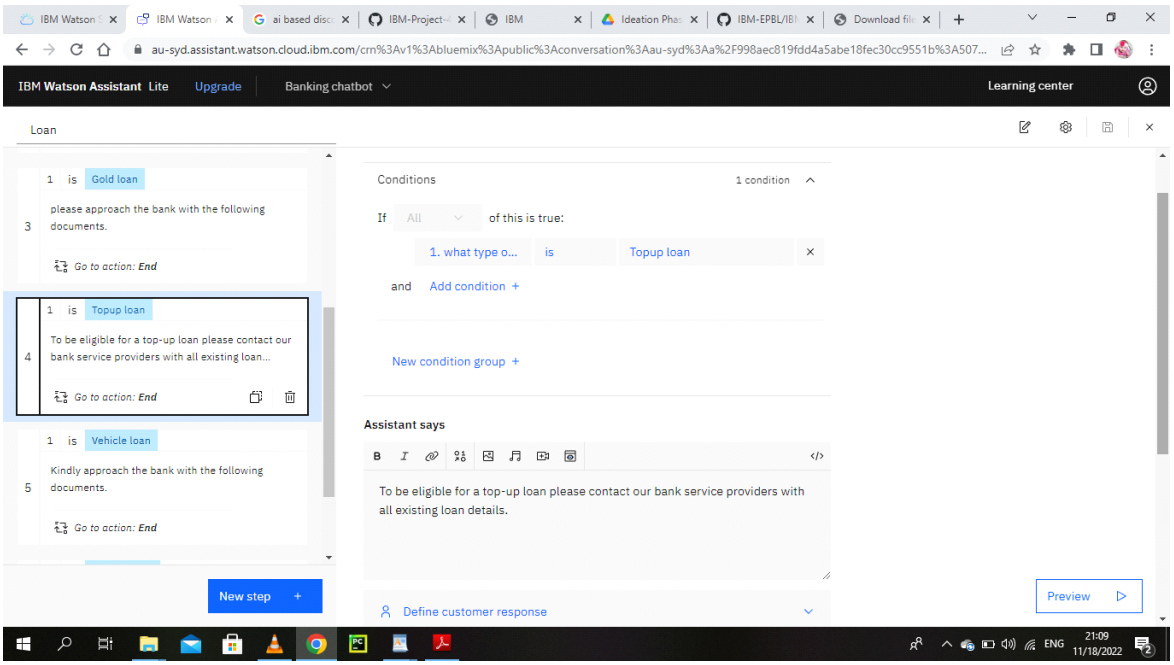
Learning center
Loan
1 is House loan
To be eligible for a house loan please contact our bank service providers with all existing loan...
Go to action: End
1 is Gold loan
please approach the bank with the following documents.
Go to action: End
1 is Topup loan
To be eligible for a top-up loan please contact 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.
OneDrive
ENG
21:08
11/18/2022


IBM Watson Assistant Lite
Upgrade
Banking chatbot
Learning center
Loan
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.
Go to action: End
1 is Topup loan
To be eligible for a top-up loan please contact our bank service providers with all existing loan...
Go to action: End
New step
please approach the bank with the following documents.
1.Pan card
2.Aadhar card
3.Passport size photo
Define customer response
And then
Go to another action
Goes to action
End
Pass values
Upon return
Continue
Edit settings
Edit passed values
Preview
ENG
21:08
11/18/2022


IBM Watson Assistant Lite
Upgrade
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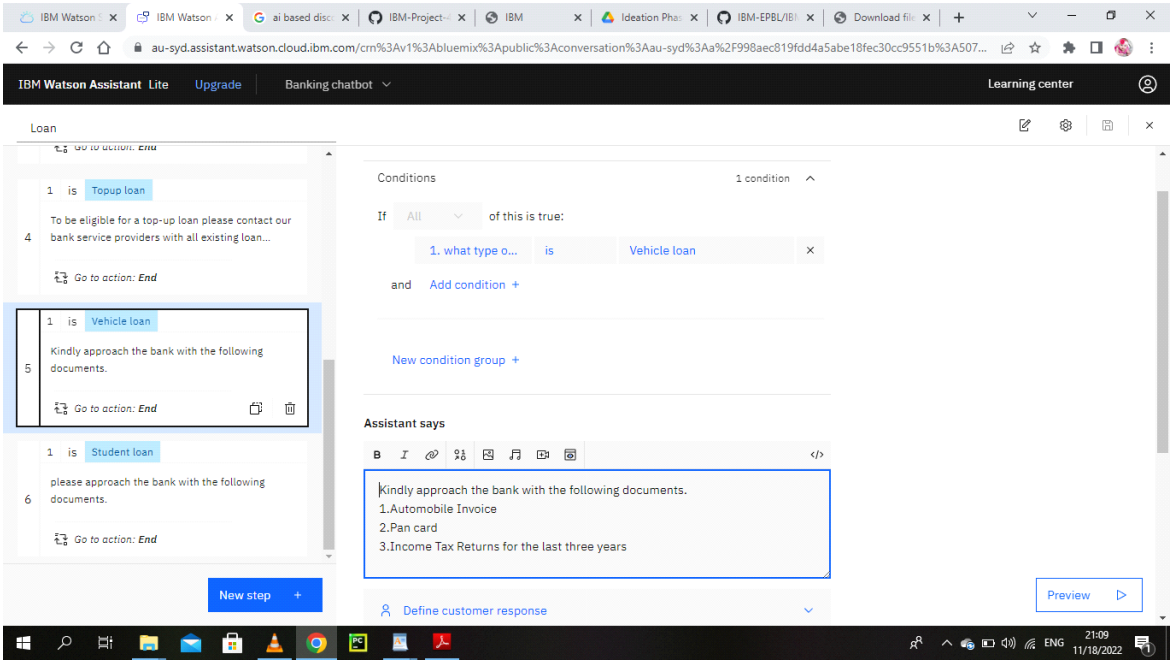
Learning center
Loan
1 is Gold loan
please approach the bank with the following documents.
Go to action: End
1 is Topup loan
To be eligible for a top-up loan please contact our bank service providers with all existing loan...
Go to action: End
1 is Vehicle loan
Kindly approach the bank with the following documents.
Go to action: End
New step
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
ENG
21:09
11/18/2022


IBM Watson Assistant Lite
Upgrade
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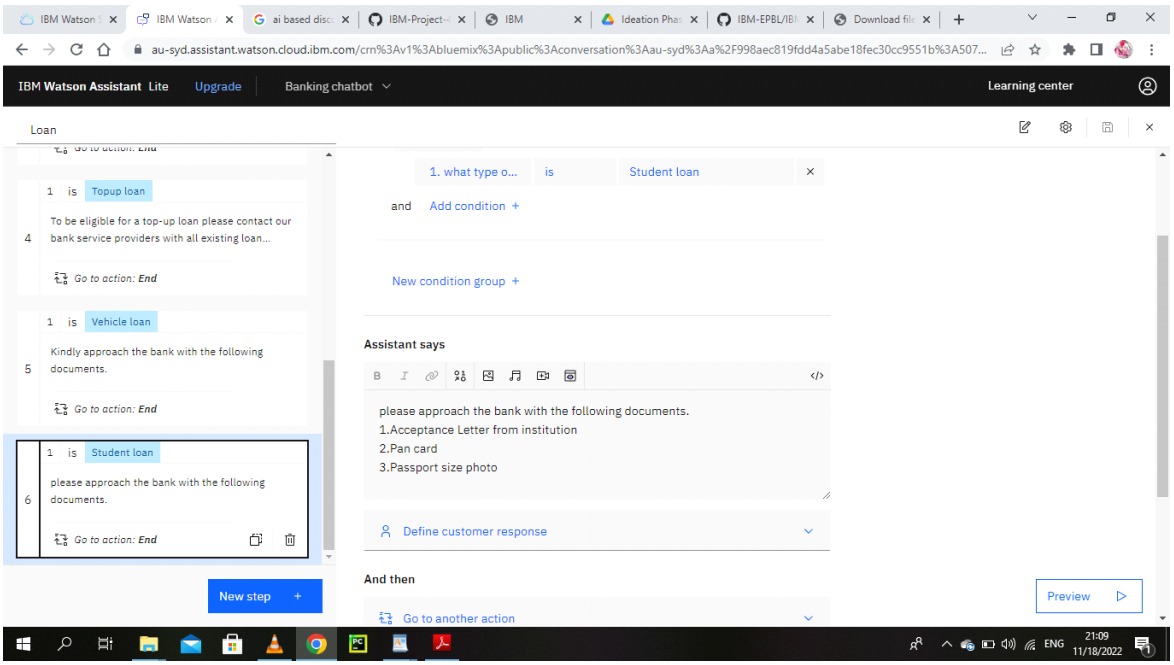
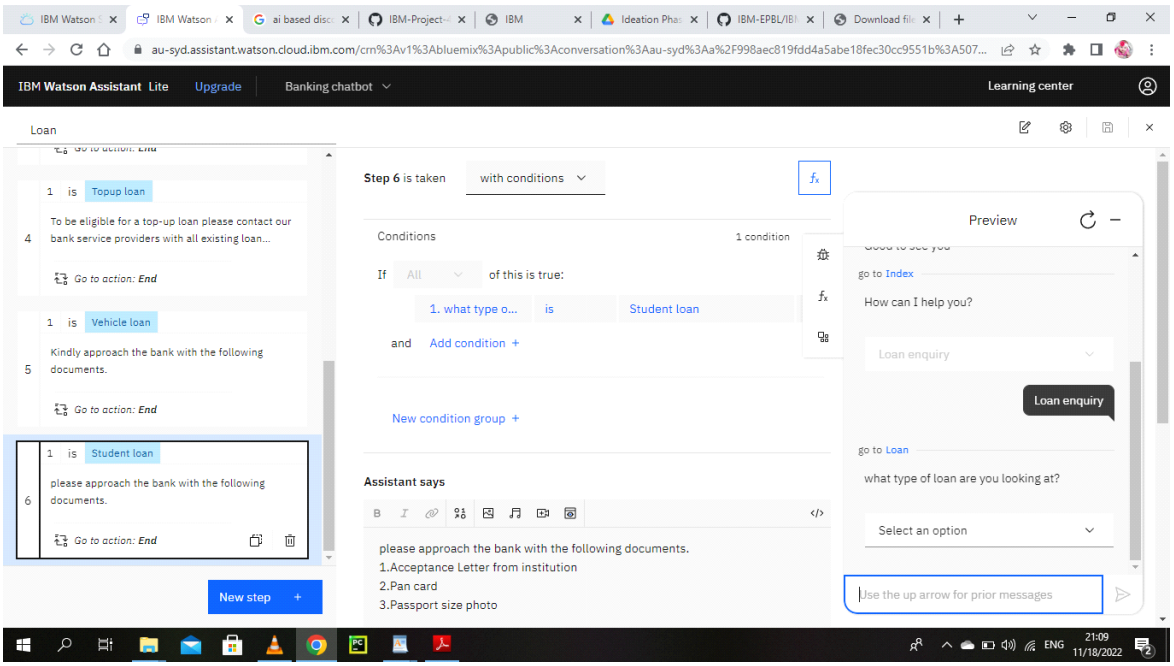
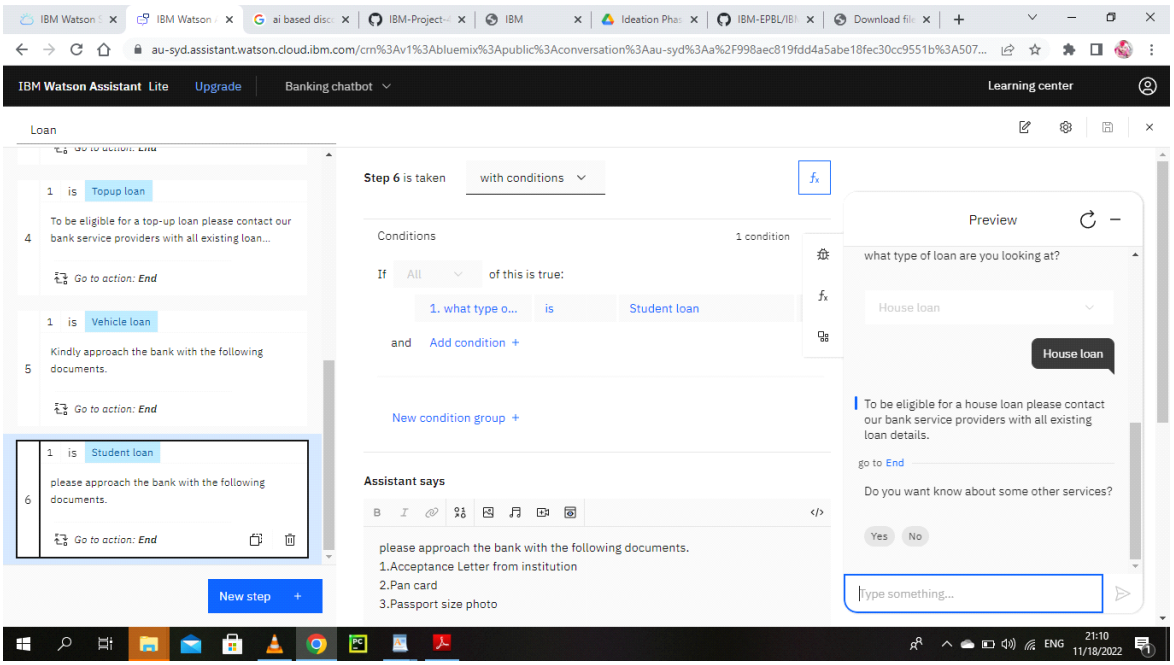
Learning center
Loan
1 is Topup loan
To be eligible for a top-up loan please contact our bank service providers with all existing loan...
Go to action: End
1 is Vehicle loan
Kindly approach the bank with the following documents.
Go to action: End
1 is Student loan
please approach the bank with the following documents.
Go to action: End
New step
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
ENG
21:09
11/18/2022



Output Screen Shots




IBM Watson Assistant Lite
Upgrade
Banking chatbot
Learning center
Loan
4 1 is Topup loan
To be eligible for a top-up loan please contact our bank service providers with all existing loan...
Go to action: End
5 1 is Vehicle loan
Kindly approach the bank with the following documents.
Go to action: End
6 1 is Student loan
please approach the bank with the following documents.
Go to action: End
New step
Step 6 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. what type o...
is
Student loan
and
Add 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?
Yes
No
Type something...
ENG
21:10
11/18/2022