

## **Project Development Phase**

### **Sprint 2:**

Date	04 November 2022
Team ID	PNT2022TMID37484
Project Name	AI Based Discourse for Banking Industry

### **Create Actions For Chatbot Assistant:**

#### **Creation of Actions for Banking Chatbot Assistant:**

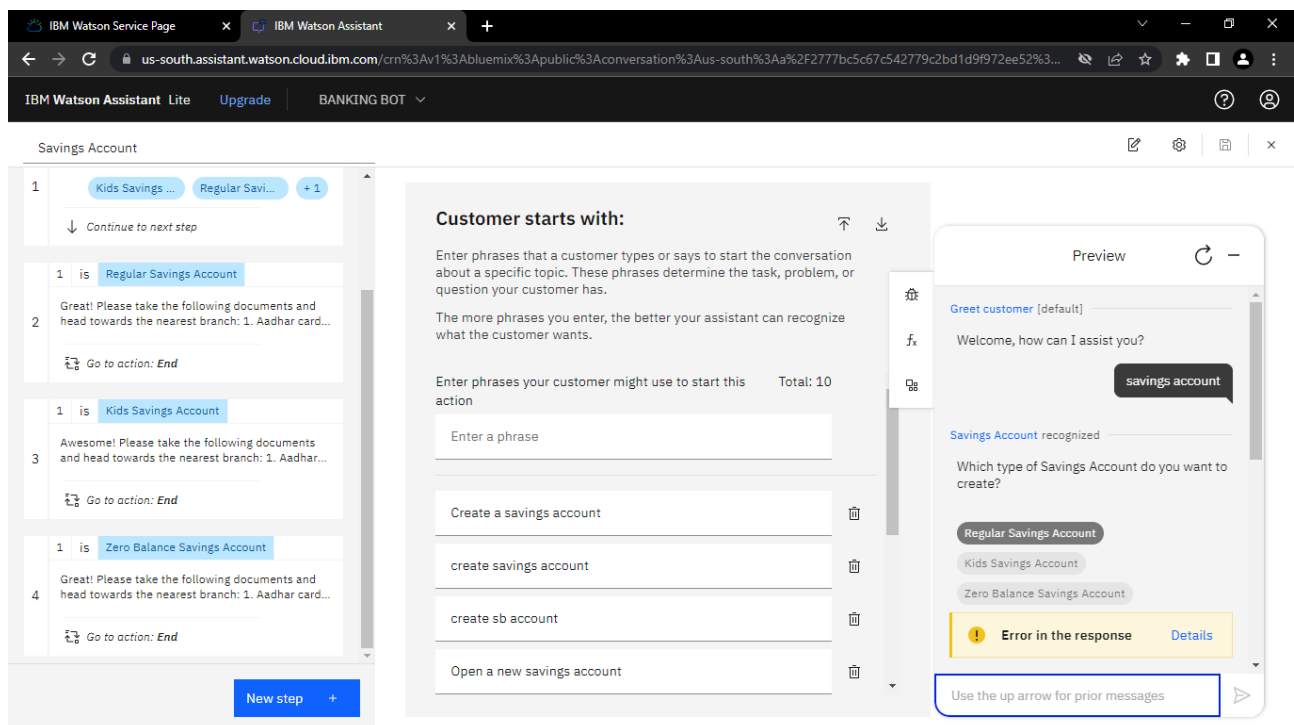
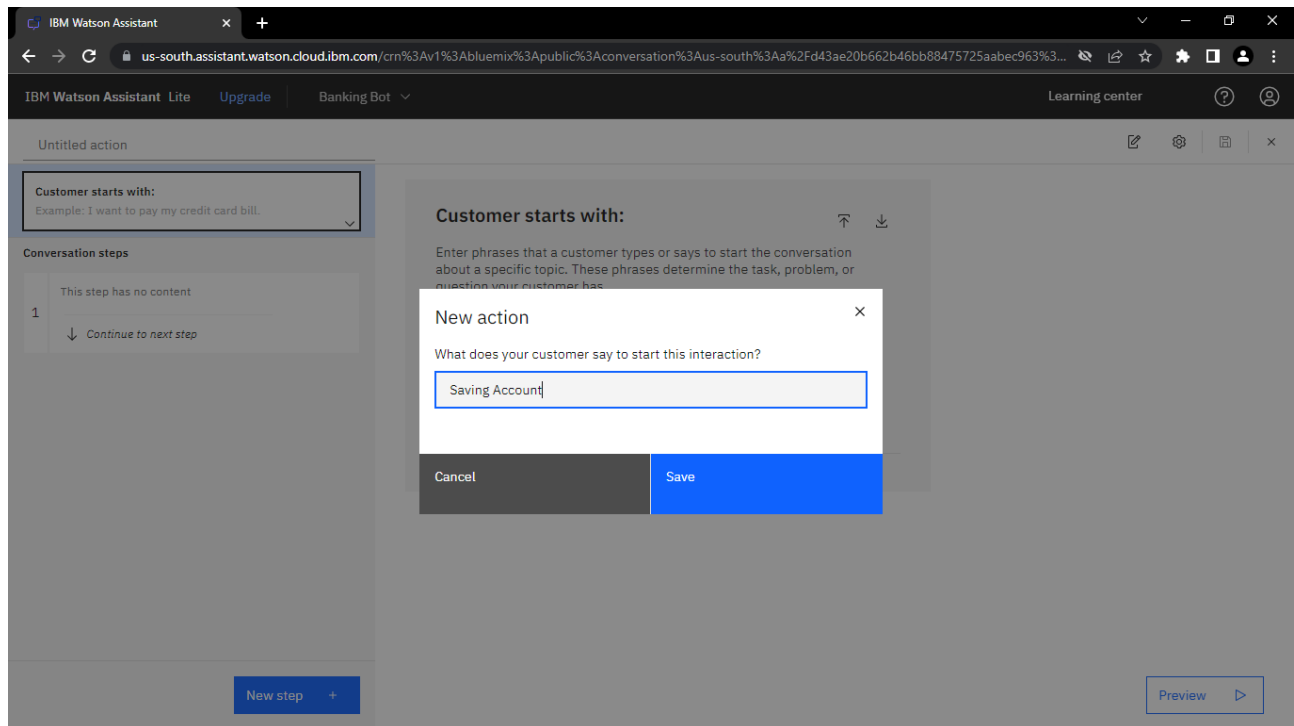
To implement AI Based Discourse for Banking Industry, we need an IBM Service.

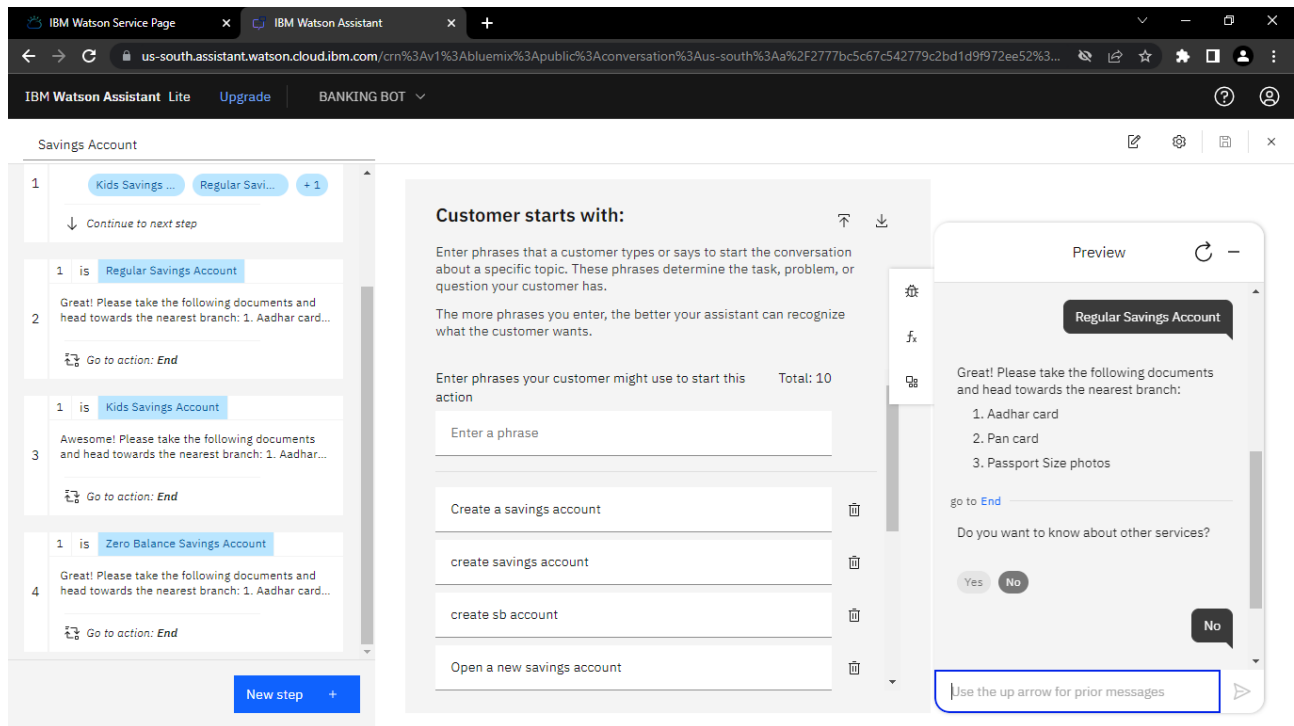
The Service used is **IBM WATSON ASSISTANT**.

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

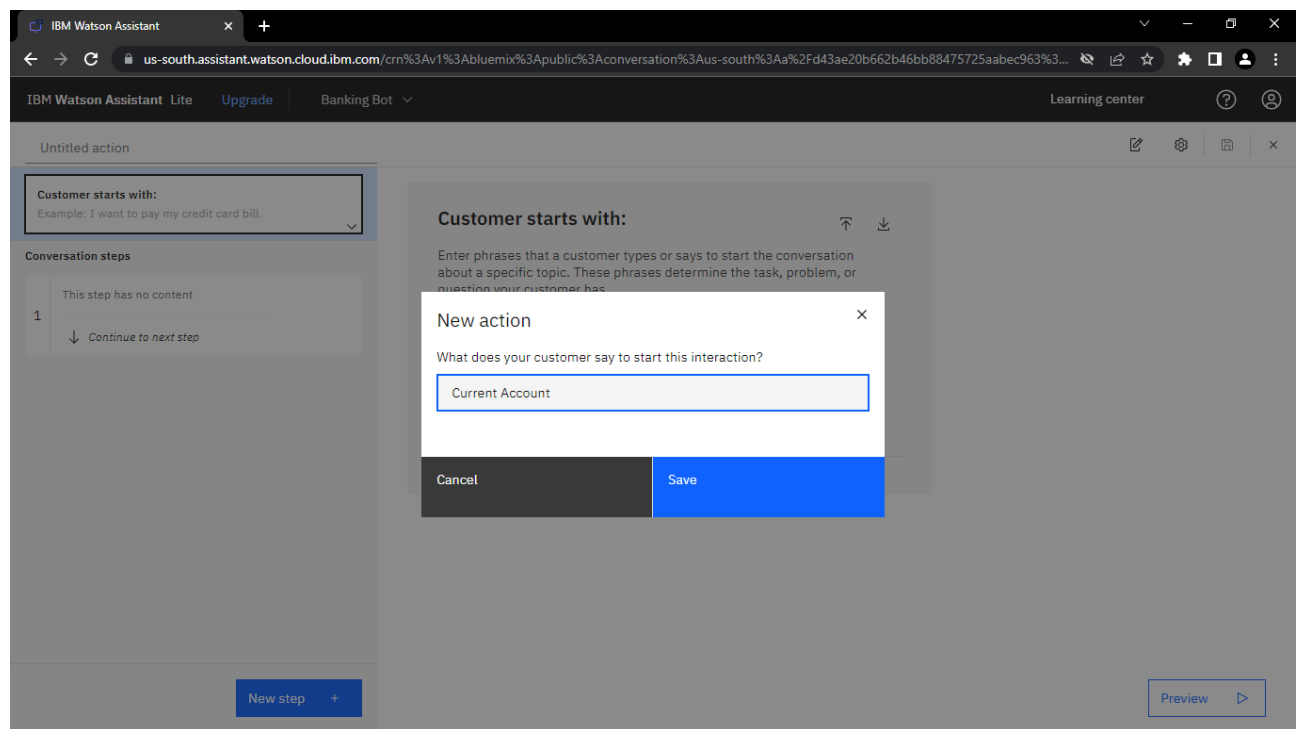
## Screenshot of Sprint 2 Tasks:

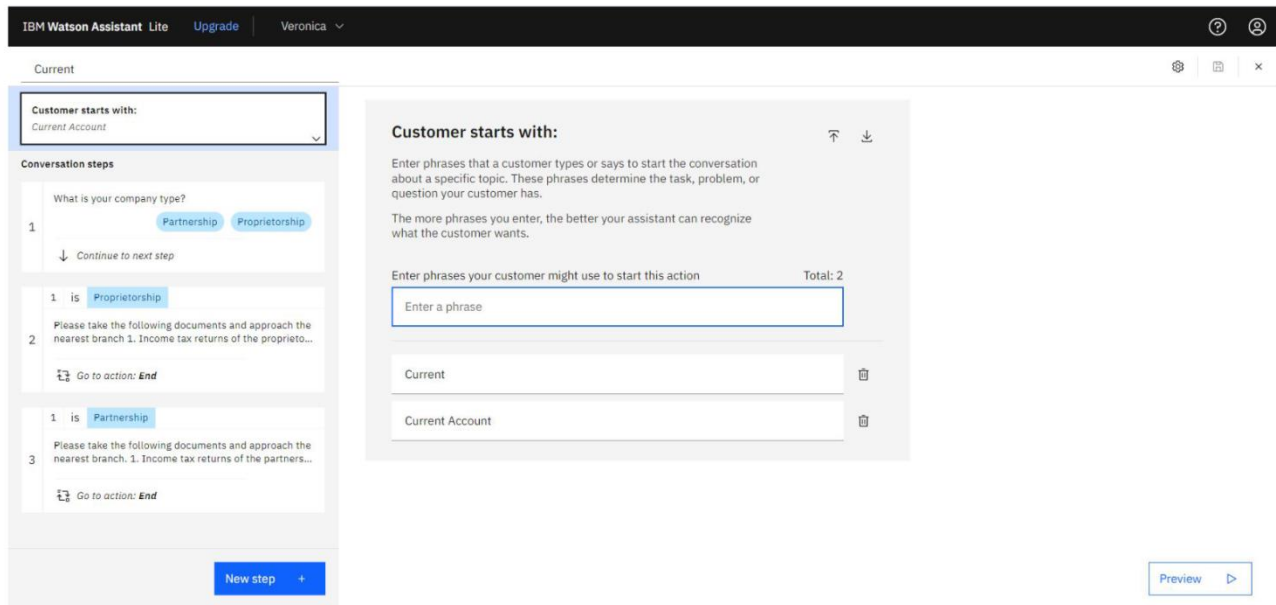
### Creating Saving Account Action:



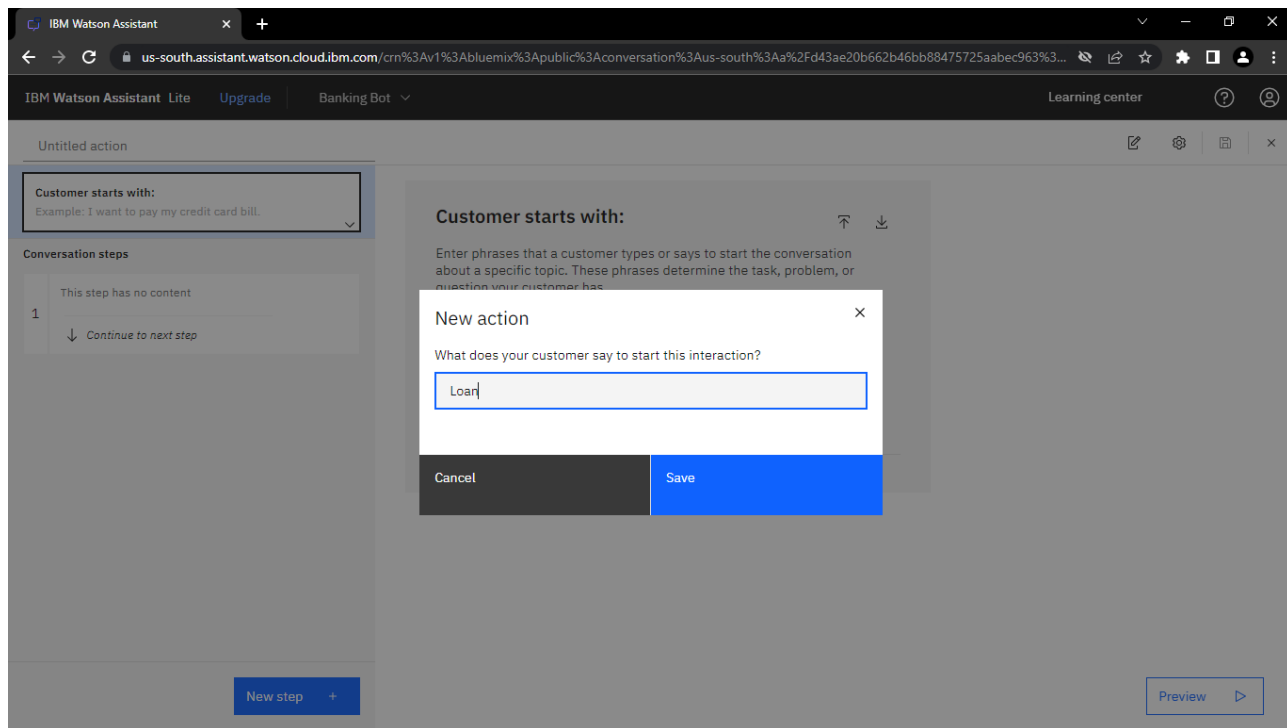


## Creating Current Action:





## Creating Loan Action:



IBM Watson Assistant

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F2777bc5c67c542779c2bd1d9f972ee52%3...

IBM Watson Assistant Lite Upgrade BANKING BOT

Loan Enquiry

Customer starts with:  
Loan

Conversation steps

1

What type of loan are you looking for?

Top Up loan Gold 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

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

IBM Watson Assistant

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F2777bc5c67c542779c2bd1d9f972ee52%3...

IBM Watson Assistant Lite Upgrade BANKING BOT

Loan Enquiry

3

Please approach the bank with the following documents:

Go to action: End

1

is

Top Up 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: 1. Automobile Invoice 2. Pan Card 3...

Go to action: End

1

is

Student loan

6

Please approach the bank with the following documents: 1. Acceptance Letter from the...

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

Greet customer [default]

Welcome, how can I assist you?

Loan

Loan Enquiry recognized

What type of loan are you looking for?

Student loan

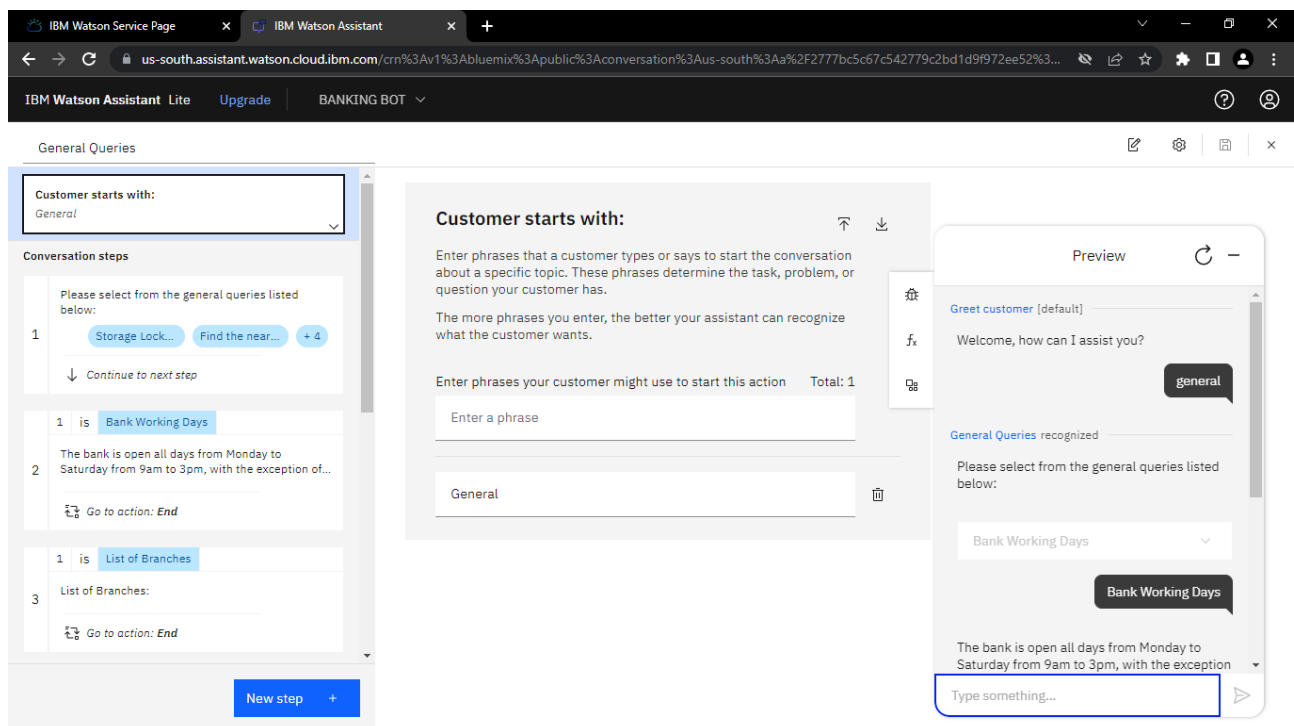
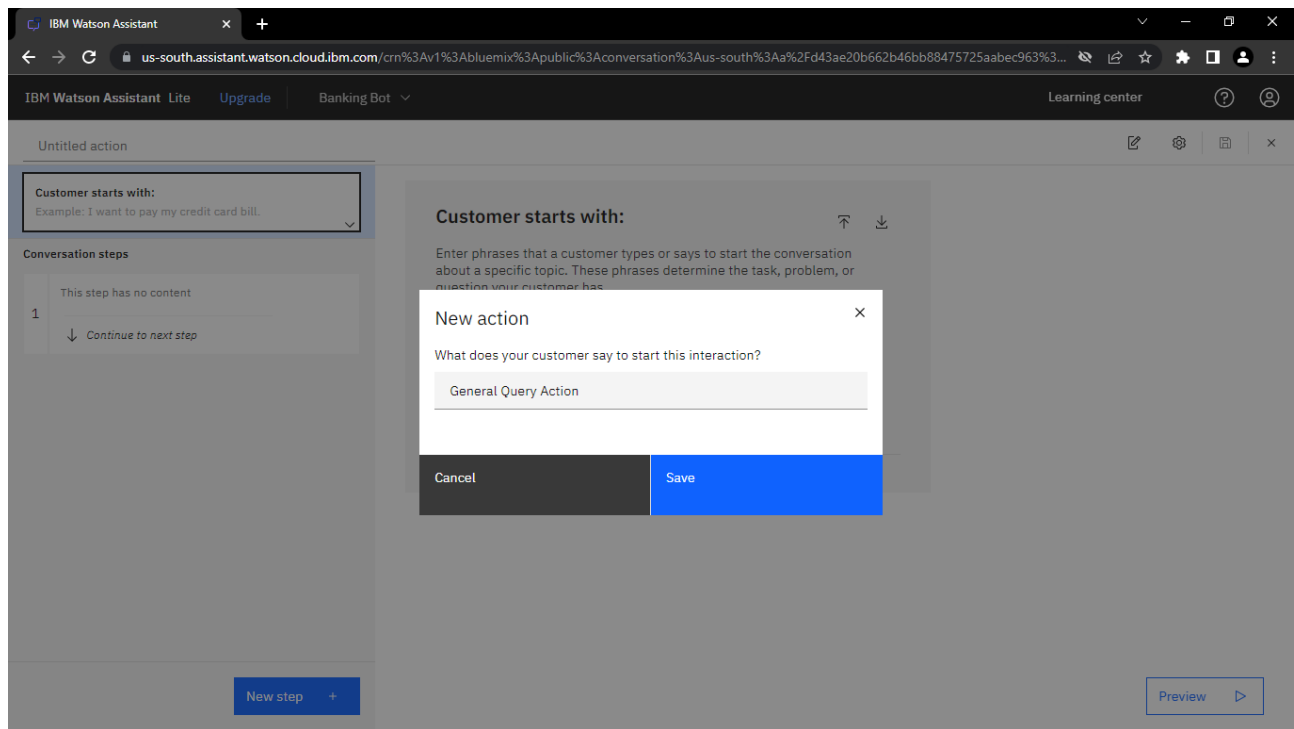
Student loan

Please approach the bank with the following documents:

1. Acceptance Letter from the Institution

Use the up arrow for prior messages

## Creating General Query Action:



The screenshot shows the IBM Watson Assistant interface. On the left, under 'General Queries', there are four items:

- 1 is **Storage Locker Facility**
- 4 - Gopalapuram - Mylapore - Chromepet - Egmore - Chetpet - Perungudi - Sholinganallur - Alandur - ...
- 1 is **Currency Conversion Facility**
- 5 All our banks have Foreign Exchange Facility
- 1 is **CIBIL**
- 6 A CIBIL Score, also known as credit score, is a three-digit number between 300 to 900 that...
- 1 is **Find the nearest branch**
- 7 Kindly reach out to our customer care executive.

Each item has a 'Go to action: End' button. A 'New step +' button is at the bottom left. On the right, the 'Preview' window shows a conversation:

**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

General

**Preview**

The bank is open all days from Monday to Saturday from 9am to 3pm, with the exception of 2nd Saturdays

go to [End](#)

Do you want to know about 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.

[General Queries](#) ended

Type something...

## Creating Net Banking Action:

The screenshot shows the IBM Watson Assistant interface. On the left, under 'Untitled action', there is a 'Customer starts with:' section with an example: 'I want to pay my credit card bill.' Below it, the 'Conversation steps' section shows a single step: '1 This step has no content' with a 'Continue to next step' button.

A 'New action' dialog box is open in the center, asking: 'What does your customer say to start this interaction?'. The text 'Net Banking Action' is entered in the input field. The dialog has 'Cancel' and 'Save' buttons.

At the bottom right, there is a 'Preview' button.

IBM Watson Assistant interface showing a conversation flow for "Net Banking".

**Customer starts with:** register for netbanking

**Conversation steps:**

- What queries do you have regarding Net Banking?  
1 is What are the ... What is NetB... + 2  
Continue to next step
- It is an electronic system provided by banks to their customers that allows them to access...  
Go to action: End
- How do I register for NetBanking?  
Please download and fill up the Net Banking requisition form and submit it to your home...  
Go to action: End

**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: 10

Access netbanking

Features of netbanking

How to access netbanking

how to obtain netbanking services

**Preview:**

Greet customer [default]

Welcome, how can I assist you?

Net Banking

Net Banking recognized

What queries do you have regarding Net Banking?

What is NetBanking?

How do I register for NetBanking?

What are the features of NetBanking?

Facing errors in NetBanking

What is NetBanking?

Use the up arrow for prior messages

IBM Watson Assistant interface showing a conversation flow for "Net Banking".

**Conversation steps:**

- It is an electronic system provided by banks to their customers that allows them to access...  
Go to action: End
- How do I register for NetBanking?  
Please download and fill up the Net Banking requisition form and submit it to your home...  
Go to action: End
- What are the features of NetBanking?  
- Check the account statement online. - Open a fixed deposit/recurring deposit account. - Pay...  
Go to action: End
- Facing errors in NetBanking  
Please contact our customer care executive or visit the nearest branch  
Go to action: End

**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: 10

Access netbanking

Features of netbanking

How to access netbanking

how to obtain netbanking services

**Preview:**

the need to physically visit the bank. Net banking allows customers to easily access a variety of banking services such as money transfers, the creation of FDs and RDs, the tracking of transactions, and so on.

go to End

Do you want to know about 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.

Net Banking ended

Type something...