

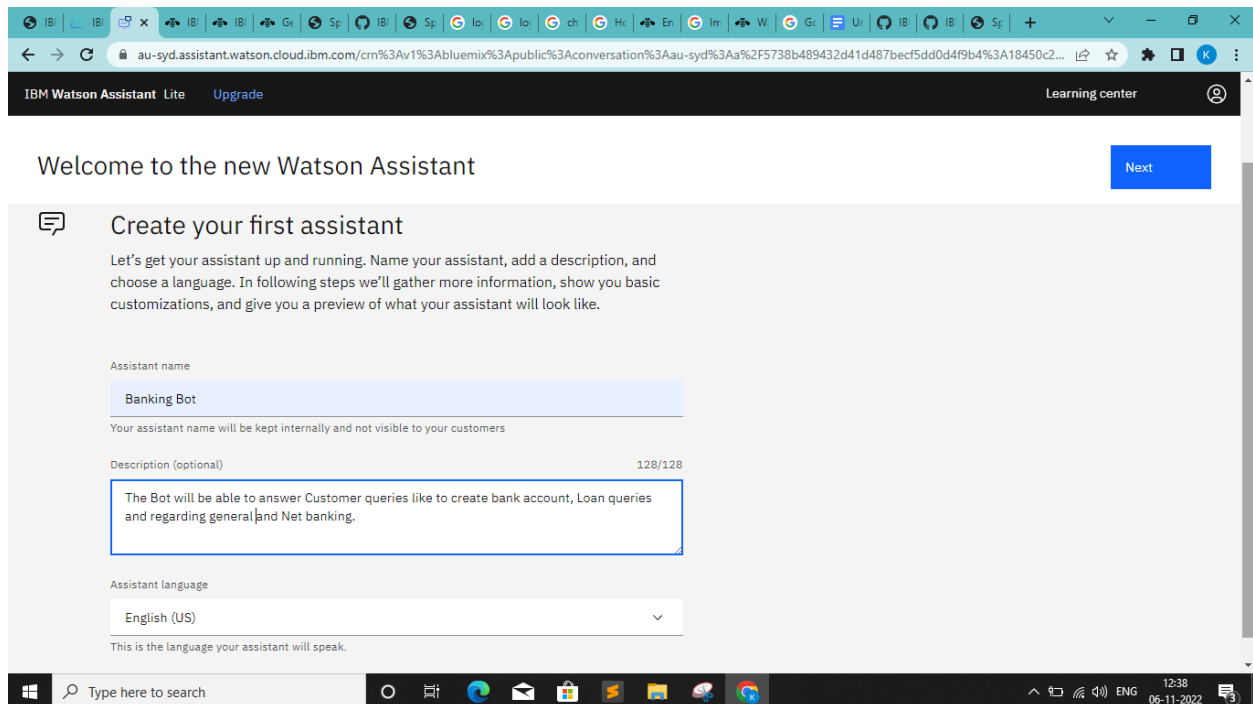
PROJECT DEVELOPMENT PHASE

SPRINT - 3

Date	05 November 2022
Team ID	PNT2022TMID24647
Project Name	AI Based Discourse for Banking Industry

Creating Skills and Assistant for Chatbot

Skills are nothing but actions and steps. Steps are the subset of actions where conversations are built and Assistant is used to integrating skills.



The screenshot shows the IBM Watson Assistant web interface. At the top, there's a navigation bar with 'IBM Watson Assistant Lite' and an 'Upgrade' button. Below this, a 'Welcome to the new Watson Assistant' message is displayed with a 'Next' button. The main section is titled 'Create your first assistant' and includes instructions: 'Let's get your assistant up and running. Name your assistant, add a description, and choose a language. In following steps we'll gather more information, show you basic customizations, and give you a preview of what your assistant will look like.'

The form contains the following fields:

- Assistant name:** A text box containing 'Banking Bot'. Below it, a note states: 'Your assistant name will be kept internally and not visible to your customers'.
- Description (optional):** A text area with a character count of '128/128'. The text entered is: 'The Bot will be able to answer Customer queries like to create bank account, Loan queries and regarding general and Net banking.'
- Assistant language:** A dropdown menu currently set to 'English (US)'. Below it, a note states: 'This is the language your assistant will speak.'

The bottom of the image shows a Windows taskbar with various application icons and a system clock indicating 12:38 on 06-11-2022.

Creating Loan Account Action :

The screenshot shows the IBM Watson Assistant interface for creating a new action named 'Loan'. The interface is divided into two main panels: a left sidebar for conversation steps and a right panel for the action configuration.

Left Panel (Conversation steps):

- Customer starts with:** A dropdown menu showing 'Loan'.
- Conversation steps:**
 - Step 1: A prompt 'What type of loan are you looking at?' with buttons for 'Gold Loan', 'Education Lo...', and a '+3' button. Below it is a 'Continue to next step' button.
 - Step 2: A prompt 'To be eligible for a house loan Please contact our bank service providers with all existing loan...' with a 'Try Free text' button. Below it is a 'Go to action: Thank you!' button.
 - Step 3: A prompt '1 is Gold Loan'.
- A 'New step +' button is at the bottom of the sidebar.

Right Panel (Action configuration):

- 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. 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): A list of phrases with a search bar and a 'Loan' phrase entered.
- A 'Preview' button is at the bottom right.

The bottom of the screen shows a Windows taskbar with the search bar and various application icons.

The screenshot shows the IBM Watson Assistant interface for configuring Step 2 of the 'Loan' action. The interface is divided into two main panels: a left sidebar for conversation steps and a right panel for the action configuration.

Left Panel (Conversation steps):

- Step 1: A prompt '1 is Topup Loan'.
- Step 4: A prompt 'To be eligible for a top-up loan Please contact our bank service providers with all existing loan...' with a 'Try Free text' button. Below it is a 'Go to action: Thank you!' button.
- Step 5: A prompt '1 is Vehicle Loan' with a 'Try Free text' button. Below it is a 'Go to action: Thank you!' button.
- Step 6: A prompt '1 is Education Loan' with a 'Try Free text' button. Below it is a 'Go to action: Thank you!' button.
- A 'New step +' button is at the bottom of the sidebar.

Right Panel (Action configuration):

- Step 2 is taken** (with conditions): A section with a 'fx' icon.
- Conditions:** A section with a '1 condition' dropdown.
 - If** (All) of this is true:
 - Condition 1: '1. What type ...' is 'House Loan'.
 - A 'New condition group +' button is at the bottom.
- Assistant says:** A section with a text area containing the prompt: 'To be eligible for a house loan Please contact our bank service providers with all existing loan details'.
- A 'Preview' button is at the bottom right.

The bottom of the screen shows a Windows taskbar with the search bar and various application 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

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
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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

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

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

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

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

Type here to search

16:05 06-11-2022

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

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

16:05 06-11-2022

Note : Attached preview contents of Loan account bot.