

Project Development Phase

Delivery of Sprint - 3

Date	07 November 2022
Team ID	PNT2022TMID18803
Project Name	AI-based discourse for Banking Industry

Creating Loan Account Action

Loan action is created with the necessary steps.

The screenshot shows the IBM Watson Assistant interface for a 'Loan' action. The top bar includes 'IBM Watson Assistant Lite', 'Upgrade', 'BANKING BOT', and 'Learning center'. The left sidebar shows the 'Conversation steps' for the 'Loan' action, with two steps: Step 1 (What type of loan are you looking at?) and Step 2 (To be eligible for a house loan please contact our bank service providers with all existing loan...). The main area shows the 'Assistant says' dialog with the text 'What type of loan are you looking at?' and a 'Choose an option' button. The 'Step 1 is taken' dropdown is set to 'without conditions'. A 'Preview' button is visible at the bottom right.

Creating General Query Action

General query action is created with the necessary steps.

The screenshot shows the IBM Watson Assistant interface for a 'Query' action. The top bar includes 'IBM Watson Assistant Lite', 'Upgrade', 'BANKING BOT', and 'Learning center'. The left sidebar shows the 'Conversation steps' for the 'Query' action, with two steps: Step 1 (Select the general queries listed below) and Step 2 (Kindly reach out to our customer care executive.). The main area shows the 'Assistant says' dialog with the text 'Select the general queries listed below' and a 'Choose an option' button. The 'Step 1 is taken' dropdown is set to 'without conditions'. A 'Preview' button is visible at the bottom right.

Creating Net Banking Action

Net banking action is created with the necessary steps.

IBM Watson Assistant Lite UpgradeBANKING BOT

Learning center ?

Net Banking

Customer starts with:
Net Banking

Conversation steps

1

what queries do you have regarding Netbanking?

Facing errors... What is Net B... + 2

Continue to next step

1

is What is Net Banking?

The facility offered by the bank allows customers to use banking services over the...

2

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

Net Banking

Preview

In addition to this greeting, end greeting ,index and end actions are also created.

Name	Last edited	Examples Count	Status	
Greeting	3 days ago	4	✓	⋮
Index	23 minutes ago	1	✓	⋮
Current	3 days ago	2	✓	⋮
Loan	3 days ago	1	✓	⋮
Net Banking	3 days ago	1	✓	⋮

Items per page: 50 Showing 1–8 of 8 actions1 1 of 1 pages

Preview

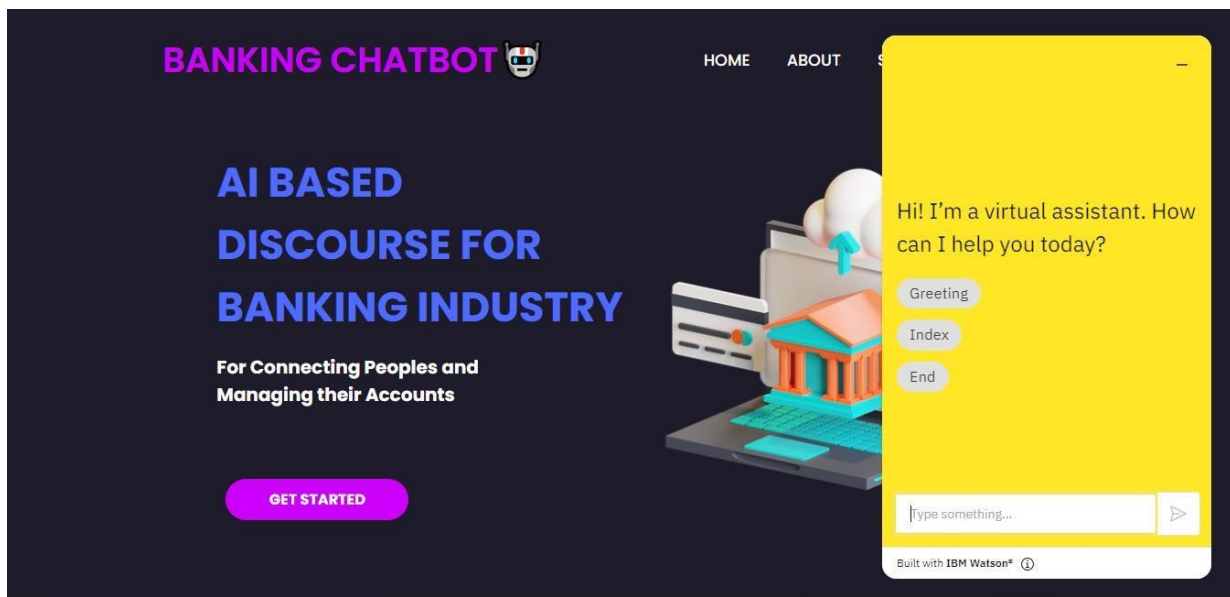
Name	Last edited	Examples Count	Status	
Net Banking	3 days ago	1	✓	⋮
Query	31 minutes ago	1	✓	⋮
Savings	3 days ago	1	✓	⋮
End	3 days ago	1	✓	⋮

Items per page: 50 Showing 1–8 of 8 actions 1 1 of 1 pages

Preview

PREVIEW OF CHATBOT:

<https://web-chat.global.assistant.watson.appdomain.cloud/preview.html?backgroundImageURL=https%3A%2F%2Fus-south.assistant.watson.cloud.ibm.com%2Fpublic%2Fimages%2Fupx-35339789-38d5-451f-8f05-3ddb5dbbe57e%3A%3A49d7f8d1-0500-4610-9518-068ec885f252&integrationID=fc789460-2e93-472d-b324-c85bef5219f5®ion=ussouth&serviceInstanceID=35339789-38d5-451f-8f05-3ddb5dbbe57e>



Note: No code for this project. So, I attached the screenshot and step to build

it.