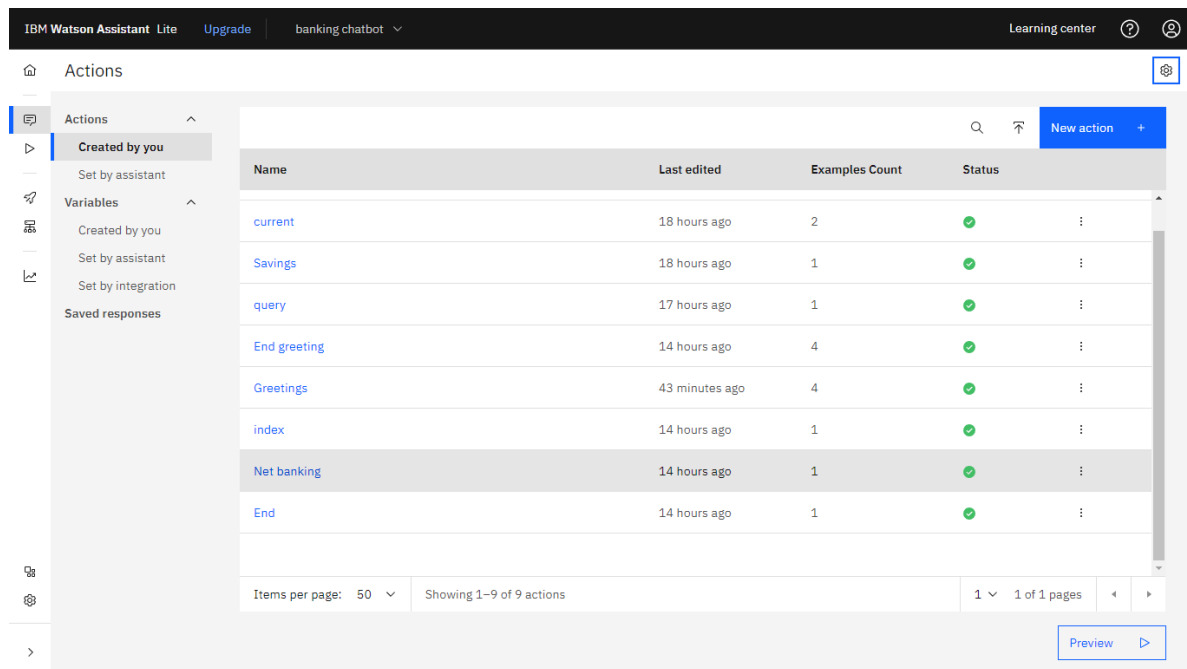


# AI BASED DISCOURSE FOR BANKING INDUSTRY

Team ID: PNT2022TMID45515

## Creating Skills And Assistant For Chatbot:

### Chatbot Skills Creation:

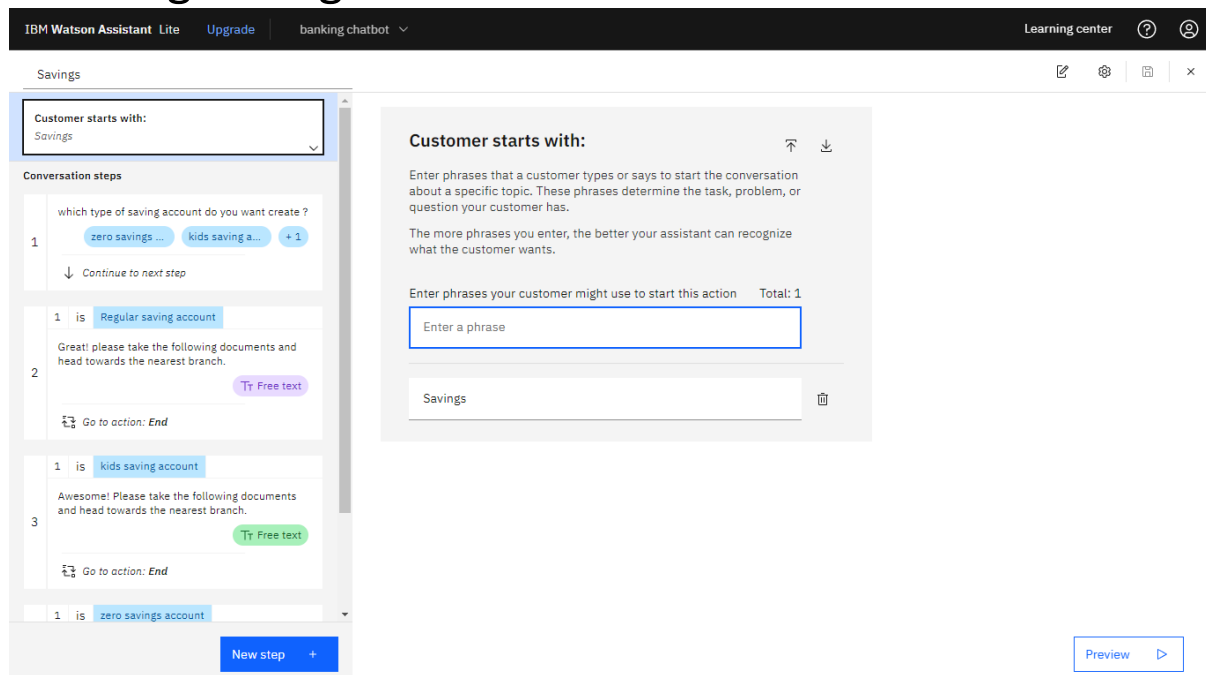


The screenshot shows the IBM Watson Assistant interface for managing actions. The top navigation bar includes 'IBM Watson Assistant Lite', 'Upgrade', 'banking chatbot', 'Learning center', and user icons. The left sidebar shows 'Actions' selected. The main area displays a table of actions created by the user.

Name	Last edited	Examples Count	Status
current	18 hours ago	2	✓
Savings	18 hours ago	1	✓
query	17 hours ago	1	✓
End greeting	14 hours ago	4	✓
Greetings	43 minutes ago	4	✓
index	14 hours ago	1	✓
Net banking	14 hours ago	1	✓
End	14 hours ago	1	✓

At the bottom, there are controls for 'Items per page: 50', 'Showing 1-9 of 9 actions', and pagination '1 of 1 pages'. A 'Preview' button is also visible.

### Creating Saving Account Action:



The screenshot shows the configuration for the 'Savings' action. The top navigation bar is the same as the previous screenshot. The left sidebar shows 'Savings' selected. The main area is divided into two panels.

**Left Panel: Conversation steps**

Customer starts with: Savings

1. which type of saving account do you want create ?  
zero savings ... kids saving a... + 1  
Continue to next step

2. 1 is Regular saving account  
Great! please take the following documents and head towards the nearest branch.  
Try Free text  
Go to action: End

3. 1 is kids saving account  
Awesome! Please take the following documents and head towards the nearest branch.  
Try Free text  
Go to action: End

4. 1 is zero savings account

**Right Panel: 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

Savings

At the bottom, there are 'New step' and 'Preview' buttons.

# Creating Current Account Action:

IBM Watson Assistant Lite Upgrade Banking Bot

Learning center ?

Current

Customer starts with:  
Current account

Conversation steps

1

What's your company type?

Partnership Proprietorship

Continue to next step

1

is Proprietorship

Please take the following Documents and approach the closest branch 1.Income Tax Returns of the proprie...

Go to action: End

1

is Partnership

Please take the following Documents and approach the closest branch 1.Income Tax Returns of the all 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: 2

Enter a phrase

Current

Current account

Preview ▶

# Creating Loan Account Action:

IBM Watson Assistant Lite Upgrade banking chatbot

Learning center ?

Loan

Customer starts with:  
Loan

Conversation steps

1

What type of loan are looking at?

gold loan house 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 details.

Tr Free text

Go to action: End

1

is gold loan

Please Approach the bank with the following documents.

Tr Free text

Go to action: End

1

is Topup loan

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: 2

Enter a phrase

loan action

Loan

Preview ▶

# Creating General Query Action:

IBM Watson Assistant Lite Upgrade banking chatbot Learning center ?

query

Customer starts with:  
query

Conversation steps

1 Select the general queries listed below.  
CIBIL Find the near... + 4  
Continue to next step

1 is Banking Working Days  
The bank is open all days from Monday to Saturday from 9 am to 3 pm, with exception of 2...  
Go to action: End

1 is List of Branches  
CHENNAI WEST MAMBALAM, CHINMAYA NAGAR  
VIRUGAM PAKKAM, CHITLAPAKKAM, CIT NAGAR...  
Go to action: End

1 is Storage Locker Facility  
ADAYAR, ADAYAR GANDHI NAGAR,  
AKKARAI,ALWARPET=VASANTHAM COLONY...  
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

query

Preview

# Creating Net Banking Action:

IBM Watson Assistant Lite Upgrade banking chatbot Learning center ?

Net banking

Customer starts with:  
Net banking

Conversation steps

1 what queries do you have regarding Net banking?  
facing errors... what are feat... + 2  
Continue to next step

1 is What is Net Banking?  
Net banking is a service provided by banks that allows customers to access banking services...  
Go to action: End

1 is How do I Register for Net Banking?  
Please download and fill up net banking requisition form and submit it to your home...  
Go to action: End

1 is what are features of Net Banking?  
- check the account statement online - open a fixed deposits account - pay utility bills such as...  
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