

# AI BASED DISCOURSE FOR BANKING INDUSTRY

Team ID: PNT2022TMID01193

## Creating Skills And Assistant For Chatbot:

### Chatbot Skills Creation:

Name	Last edited	Examples Count	Status
End greeting	a month ago	3	✓
Net Banking	a month ago	1	✓
loan	a month ago	1	✓
Savings	a month ago	1	✓
Index	a month ago	1	✓
Clarifications	a month ago	2	✓
Thank you!	22 days ago	7	✓
End	22 days ago	1	✓
Current	a month ago	2	✓

### Creating Saving Account Action:

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

# 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 proprieto...

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 Bot

Learning center ?

loan

Customer starts with:  
loan

Conversation steps

1

What type of loan are you looking at?

Top-up 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 detail...

Go to action: End

1

is Gold loan

Please approach the bank with following documents: 1. Pan Card 2. Aadhar Card 3. Passpor...

Go to action: End

1

is Top-up loan

To be eligible for a top-up loan please contact ou...

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

# Creating General Query Action:

The screenshot shows the IBM Watson Assistant Lite interface. The top navigation bar includes "IBM Watson Assistant Lite", "Upgrade", "Banking Bot", "Learning center", and help icons. The main window is titled "Query". On the left, a sidebar shows "Conversation steps" with a list of queries: "Find a nearest...", "Bank Workin...", and "+ 7". Below this, a "New step" button is visible. The main content area is titled "Customer starts with:" and contains 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." Below the instructions, there is a text input field labeled "Enter a phrase" and a "Query" input field. A "Preview" button is located at the bottom right.

# Creating Net Banking Action:

The screenshot shows the IBM Watson Assistant Lite interface. The top navigation bar includes "IBM Watson Assistant Lite", "Upgrade", "Banking Bot", "Learning center", and help icons. The main window is titled "Net Banking". On the left, a sidebar shows "Conversation steps" with a list of queries: "What queries do you have regarding net banking?", "What is Net B...", "How do I regi...", and "+ 2". Below this, a "New step" button is visible. The main content area is titled "Customer starts with:" and contains 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." Below the instructions, there is a text input field labeled "Enter a phrase" and a "Net Banking" input field. A "Preview" button is located at the bottom right.