

Project Development Phase

Delivery of Sprint - 3

Date	01 November 2022
Team ID	PNT2022TMID01193
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 creating a new action named 'loan'. The interface is divided into two main panels. The left panel, titled 'Conversation steps', shows a sequence of steps for the action. Step 1 is 'What type of loan are you looking at?' with options 'Top-up loan', 'Student loan', and '+3'. Step 2 is '1 is House loan' with a description 'To be eligible for a house loan please contact our bank service providers with all existing loan detail...' and a 'Go to action: End' button. Step 3 is '1 is Gold loan' with a description 'Please approach the bank with following documents: 1. Pan Card 2. Aadhar Card 3. Passpor...' and a 'Go to action: End' button. Step 4 is '1 is Top-up loan' with a description 'To be eligible for a top-up loan please contact our...'. The right panel, titled 'Customer starts with:', shows a text input field for entering phrases that a customer might use to start this action. The input field contains the word 'loan'. Below the input field, there is a 'Preview' button.

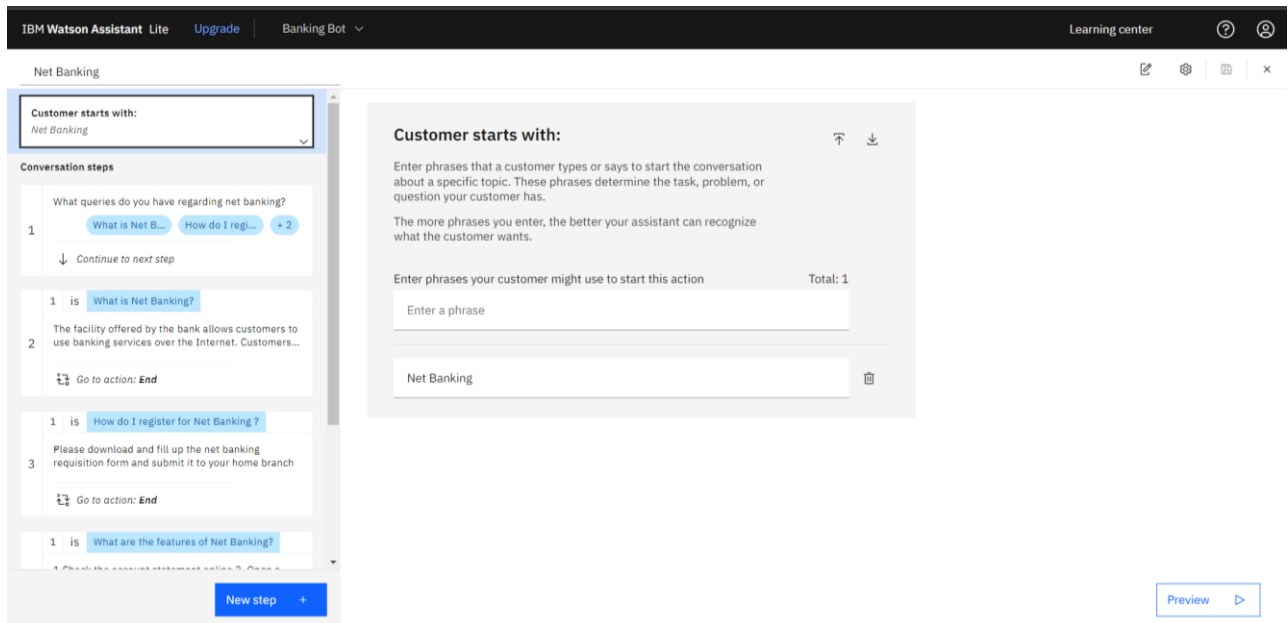
Creating General Query Action

General query action is created with the necessary steps.

The screenshot shows the IBM Watson Assistant interface for creating a new action named 'Query'. The interface is divided into two main panels. The left panel, titled 'Conversation steps', shows a sequence of steps for the action. Step 1 is 'Select the general queries listed below' with options 'Find a neares...', 'Bank Workin...', and '+7'. Step 2 is '1 is Bank Working Days' with a description 'The bank is open all days from Monday to Saturday from 9 am to 3 pm ,with exception of 2nd Saturdays.' and a 'Go to action: End' button. Step 3 is '1 is List of Branches' with a description '6TH AVENUE ANNA NAGAR, A P M BRANCHCHENNAI, ABHIRAMAPURAM,...' and a 'Go to action: End' button. Step 4 is '1 is Storage locker facility' with a description 'A P M BRANCHCHENNAI, ABHIRAMAPURAM...'. The right panel, titled 'Customer starts with:', shows a text input field for entering phrases that a customer might use to start this action. The input field contains the word 'Query'. Below the input field, there is a 'Preview' button.

Creating Net Banking Action

Net banking action is created with the necessary steps.

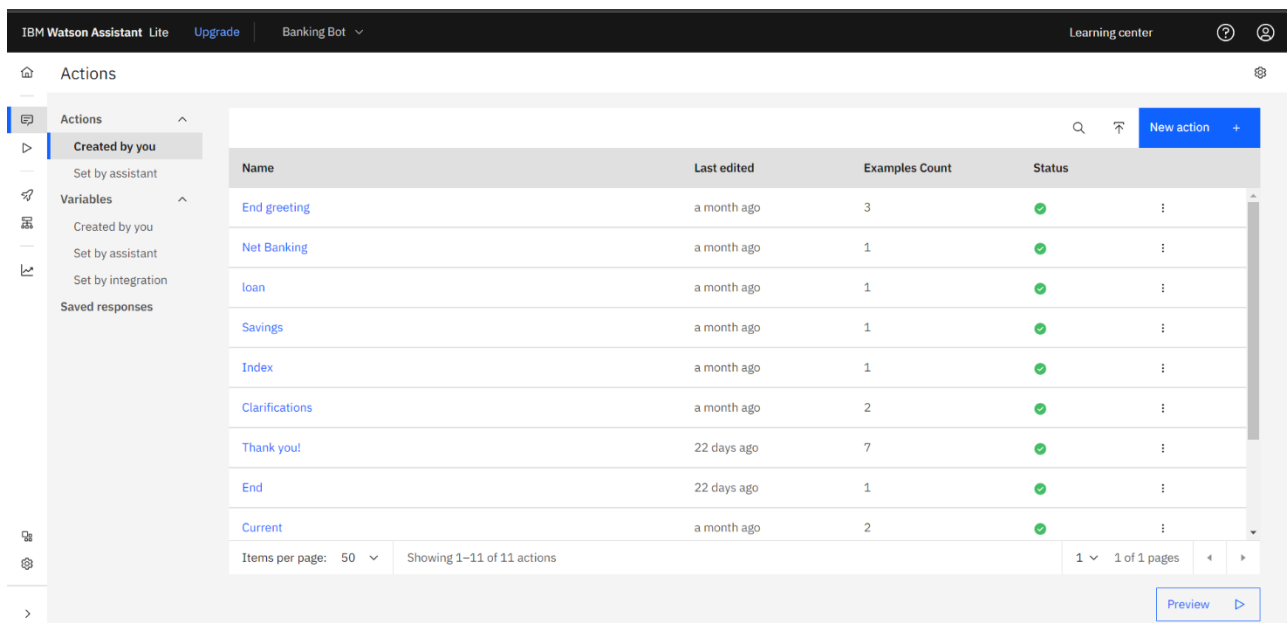


The screenshot displays the IBM Watson Assistant interface for configuring a 'Net Banking' action. The left pane, titled 'Net Banking', shows the 'Conversation steps' section. It lists several queries and their corresponding actions:

- Query 1: 'What queries do you have regarding net banking?' with actions 'What is Net B...' and 'How do I regi...'.
- Query 2: 'The facility offered by the bank allows customers to use banking services over the Internet. Customers...' with action 'Go to action: End'.
- Query 3: 'Please download and fill up the net banking requisition form and submit it to your home branch' with action 'Go to action: End'.
- Query 4: 'What are the features of Net Banking?' with action 'Go to action: End'.

The right pane, titled 'Customer starts with:', shows the '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.' section. It includes a text input field 'Enter a phrase' and a list of phrases to start the action, with a total count of 1.

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



The screenshot displays the IBM Watson Assistant interface for the 'Actions' section. The table lists the following actions:

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	✓

The table also includes a 'New action +' button and a 'Preview' button. The bottom of the table shows 'Items per page: 50' and 'Showing 1–11 of 11 actions'.

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	Examples Count	Status	
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	✓	⋮
Query	a month ago	1	✓	⋮
Greeting	22 days ago	4	✓	⋮

Items per page: 50

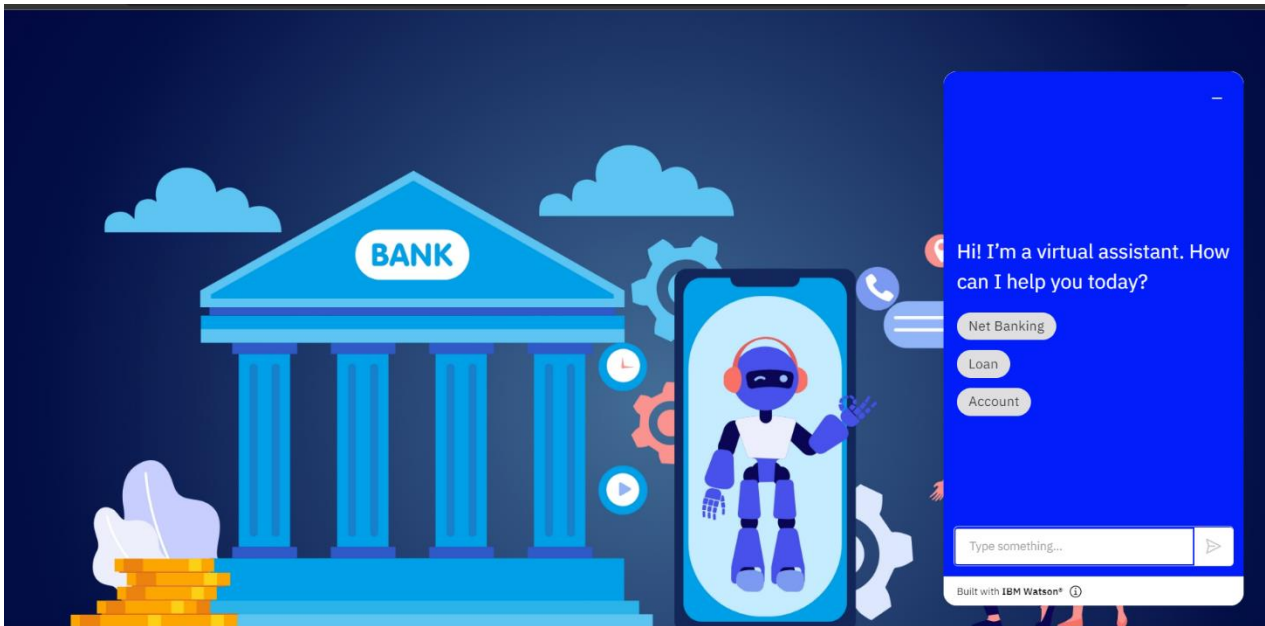
Showing 1–11 of 11 actions

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-d06762b6-396b-4236-8512-e118333e6832%3A%3A495bdb54-8670-415a-a8aa-5480cc1528ef&integrationID=2d33609b-c061-4015-9c69-6993e984734c®ion=us-south&serviceInstanceID=d06762b6-396b-4236-8512-e118333e6832>



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