

## CREATING CURRENT ACCOUNT ACTION

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STEP1:

creating skill for current account

The screenshot displays the IBM Watson Assistant configuration interface in a web browser. The browser's address bar shows the URL: `us-south.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F241b81820f374ccca7569947527fc8b%3A09914a8a-d02a-4009-9047-287d...`. The interface is titled 'current account' and includes a 'banking bot' dropdown menu. On the left, the 'Conversation steps' panel shows a sequence of steps for handling 'current' inquiries. Step 1 asks for the company type, with options for 'proprietorship' and 'partnership'. Step 2 provides instructions to take documents and approach the closest branch, with a 'Free text' input field. Step 3 also provides instructions and a 'Free text' input field. A 'New step' button is at the bottom of this panel. On the right, the 'Customer starts with:' panel shows a list of phrases that trigger the skill, including 'current account' and 'current'. A 'Preview' button is located at the bottom right of the interface. The Windows taskbar at the bottom shows the date as 14-11-2022 and the time as 15:42.

STEP2:

The following steps are for creating new query to current account.

IBM Watson Assistant interface showing a conversation step configuration. The left sidebar displays the conversation flow with three steps. Step 1 is selected, showing a prompt "what's your company type?" with buttons for "proprietorship" and "partnership". The main area shows the configuration for Step 1, which is taken "without conditions". The Assistant says "what's your company type?" and the response is a list of buttons for "proprietorship" and "partnership". The "And then" section shows a "Continue to next step" action.

current account

Customer starts with: current

Conversation steps

1 what's your company type ? proprietorship partnership

Continue to next step

1 is proprietorship

Please take the following documents and approach the closest branch.

2 Tr Free text

Go to action: end

1 is partnership

Please take the following documents and approach the closest branch.

3 Tr Free text

Go to action: end

New step +

Step 1 is taken without conditions

Assistant says

what's your company type ?

proprietorship partnership

Edit response Edit validation

And then

Continue to next step

Preview

## STEP3:

IBM Watson Assistant interface showing a conversation step configuration. The left sidebar displays the conversation flow with three steps. Step 2 is selected, showing a prompt "Please take the following documents and approach the closest branch." with a "Tr Free text" button. The main area shows the configuration for Step 2, which is taken "with conditions". The conditions are set to "If All of this is true:" with a condition "1. what's your comp... is proprietorship". The Assistant says "Please take the following documents and approach the closest branch." with a list of documents: "Income tax returns of the Proprietor for the last 3 years", "Company agreement", and "Pan card".

current account

Customer starts with: current

Conversation steps

1 what's your company type ? proprietorship partnership

Continue to next step

1 is proprietorship

Please take the following documents and approach the closest branch.

2 Tr Free text

Go to action: end

1 is partnership

Please take the following documents and approach the closest branch.

3 Tr Free text

Go to action: end

New step +

Step 2 is taken with conditions

Conditions 1 condition

If All of this is true:

1. what's your comp... is proprietorship

and Add condition +

New condition group +

Assistant says

Please take the following documents and approach the closest branch.

- Income tax returns of the Proprietor for the last 3 years
- Company agreement
- Pan card

User enters free text

Preview

## STEP4:

All the queries for current account has been added successfully.

The screenshot displays the IBM Watson Assistant configuration interface in a web browser. The browser's address bar shows the URL: `us-south.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F241b81820f374ccca756994752f7fc8b%3A00914a8a-d02a-4009-9047-287d...`. The interface is titled "current account" and includes a "banking bot" dropdown menu.

**Conversation steps:**

- Step 1:** "what's your company type ?" with options "proprietorship" and "partnership". The action is "Continue to next step".
- Step 2:** "Please take the following documents and approach the closest branch." with a "Free text" input field. The action is "Go to action: end".
- Step 3:** "Please take the following documents and approach the closest branch." with a "Free text" input field. The action is "Go to action: end".

**Conditions:**

Step 3 is taken with conditions. The condition is: "If All of this is true: 1. what's your comp... is partnership".

**Assistant says:**

Please take the following documents and approach the closest branch.

- Income tax returns of the Partners for the last 3 years
- Company agreement
- Pan card of both partners

The interface also includes a "Preview" button and a "New step +" button. The bottom of the screen shows a Windows taskbar with the date and time: 15:43 14-11-2022.