

CREATING LOAN ACCOUNT ACTION

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STEP1:

creating skill for Loan 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/cn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F241b81820f374ccca7569947527fc8b%3A09914a8a-d02a-4009-9047-287d...`. The interface is titled 'loan enquiry' and includes a 'banking bot' dropdown menu. On the left, the 'Conversation steps' panel shows a sequence of steps for handling loan enquiries, including prompts like 'What type of loan are you looking at?' and 'To be eligible for a House loan please contact our bank service providers with all existing loan details.' The main area on the right is titled 'Customer starts with:' and provides instructions on how to configure phrases that trigger the skill. It includes a text input field labeled 'Enter a phrase' and a 'Preview' button at the bottom right. The bottom of the screen shows a Windows taskbar with various application icons and system status information, including the date '14-11-2022' and time '15:44'.

STEP2:

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

IBM Watson Assistant interface showing a conversation step configuration for a loan enquiry.

Customer starts with: loan enquiry

Conversation steps:

1. What type of loan are you looking at?
Options: Vehicle loan, Student loan, +3
Action: 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 details.
Action: end
- 1 is Gold loan
Great ! . Please take the following documents and head towards the nearest branch.
Action: end
- 1 is Topup loan

Step 1 is taken without conditions

Assistant says: What type of loan are you looking at ?

And then: Continue to next step

Buttons: Preview

STEP3:

IBM Watson Assistant interface showing a conversation step configuration for a loan enquiry, specifically Step 2.

Conversation steps:

1. What type of loan are you looking at?
Options: Vehicle loan, Student loan, +3
Action: 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 details.
Action: end
- 1 is Gold loan
Great ! . Please take the following documents and head towards the nearest branch.
Action: end
- 1 is Topup loan

Step 2 is taken with conditions

Conditions: 1 condition

If All of this is true:

- 1. What type of loan... is House loan

and Add condition +

Assistant says: To be eligible for a House loan please contact our bank service providers with all existing loan details .

Buttons: Preview

STEP4:

The screenshot shows the IBM Watson Assistant interface for a "loan enquiry" conversation. On the left, a list of steps is visible, with Step 3 highlighted. Step 3 is titled "Gold loan" and contains the text: "Great ! . Please take the following documents and head towards the nearest branch." Below the text, there is a "Go to action: end" button. On the right, the "Step 3 is taken" configuration panel is shown. It includes a "Conditions" section with a single condition: "1. What type of loan... is Gold loan". Below the conditions, there is a "New condition group +" button. The "Assistant says" section shows the output text: "Great ! . Please take the following documents and head towards the nearest branch." followed by a bulleted list of documents: "Aadhar card", "Pan card", and "Passport size photo". A "Preview" button is located at the bottom right of the assistant's response area.

STEP5:

The screenshot shows the IBM Watson Assistant interface for a "loan enquiry" conversation, now at Step 4. On the left, the list of steps is updated, with Step 4 highlighted. Step 4 is titled "Topup loan" and contains the text: "To be eligible for a Topup loan please contact our bank service providers with all existing loan details." Below the text, there is a "Go to action: end" button. On the right, the "Step 4 is taken" configuration panel is shown. It includes a "Conditions" section with a single condition: "1. What type of loan... is Topup loan". Below the conditions, there is a "New condition group +" button. The "Assistant says" section shows the output text: "To be eligible for a Topup loan please contact our bank service providers with all existing loan details .". A "Preview" button is located at the bottom right of the assistant's response area.

STEP6:

The screenshot displays the IBM Watson Assistant interface for a 'loan enquiry' workflow. On the left, a list of steps is shown, with Step 5, 'Vehicle loan', highlighted. The main panel shows the configuration for Step 5, which is set to 'with conditions'. The conditions are defined as: 'If All of this is true: 1. What type of loan... is Vehicle loan'. Below the conditions, the 'Assistant says' section contains the text: 'Kindly approach the bank with the following documents: 1. Automobile invoice, 1. Pan card, 1. Income tax returns for the last three years.' A 'Preview' button is visible at the bottom right of the assistant's response area.

STEP7: All the queries for current account has been added successfully.

The screenshot displays the IBM Watson Assistant interface for a 'loan enquiry' workflow, showing Step 6 configuration. The conditions are defined as: 'If All of this is true: 1. What type of loan... is Student loan'. Below the conditions, the 'Assistant says' section contains the text: 'Please approach the bank with the following documents: • Acceptance letter from institution, • Pan card, • Passport size photos.' A 'Preview' button is visible at the bottom right of the assistant's response area.