

Sprint – 3

Project Development Phase

Team ID	PNT2022TMID29037
Project Name	Project – AI Based Discourse For Banking Industry

Creating contents and responses for “Change personal details” Action:

The screenshot displays the IBM Watson Assistant Lite interface for configuring a chatbot action named "Change Personal Details". The interface is divided into several sections:

- Header:** "IBM Watson Assistant Lite" with an "Upgrade" button and a "Banking Chatbot" dropdown menu.
- Conversation steps:** A list of steps for the action. Step 1 is highlighted, showing a prompt "Select any one of the below option:" with two buttons: "Change pers..." and "Add personal...". Below the buttons is a "Continue to next step" link.
- Response configuration:** A section for defining the chatbot's response. It includes a "Define customer response" dropdown menu. The response text is: "for authentication. Next, you can add your home address, mobile number, e-mail, change profile photo, and much more. Then, click on SAVE. The changes will be saved within few minutes. You can also opt to change the personal details by approaching at your home branch."
- And then:** A section for defining the next action. It includes a "Go to another action" dropdown menu. The next action is "End".
- Buttons:** "Edit settings" and "Edit passed values" buttons are located at the bottom of the response configuration section.

Creating contents and responses for “Credit card” Actions:

The screenshot shows the IBM Watson Assistant interface for the 'Credit Card' topic. The left pane displays a list of actions, with the third action, 'Forgot card PIN number', highlighted. The right pane shows the configuration for this action, including a customer response and a flowchart for the 'And then' section.

IBM Watson Assistant Lite | [Upgrade](#) | Banking Chatbot

Credit Card

↓ Continue to next step

1 is **Card is going to expire**

2 You can visit your home branch and apply for a new Credit / Debit card. You will receive the new...

Go to action: End

1 is **Card is not working**

3 Following can be the reasons for card not working properly: 1. The expiry date of card has arrived.

Go to action: End

1 is **Forgot card PIN number**

4 You can login into our website here: link
 and enter your details, account number and IFSC...

Go to action: End

[New step](#) +

You can login into our website here: link
and enter your details, account number and IFSC code.
Your registered mobile number will get an OTP, enter the OTP in the website.
Go to the "Reset PIN" option and dial your new PIN for your card.

[Define customer response](#)

And then

[Go to another action](#)

Goes to action: End

Pass values

Upon return: Continue

[Edit settings](#) [Edit passed values](#)

Creating contents and responses for “Current” Actions:

The screenshot shows the IBM Watson Assistant interface for the 'Current' topic. The left pane displays a list of actions, with the fifth action, 'Joint Account', highlighted. The right pane shows the configuration for this action, including a customer response and a flowchart for the 'And then' section.

IBM Watson Assistant Lite | [Upgrade](#) | Banking Chatbot

Current

Go to action: End

1 is **Standard**

3 Standard current accounts are bank accounts designed for everyday use, depositing...

Go to action: End

1 is **Foreign Currency**

4 A foreign currency account is a multi-currency borderless account that allows the account hold...

Go to action: End

1 is **Joint Account**

5 A joint account is a bank account that two or more individuals share. Joint account holders have...

Go to action: End

[New step](#) +

A joint account is a bank account that two or more individuals share. Joint account holders have equal access to all funds. Signatures of one or all account holders may be required for transactions carried out through a joint account. With a joint account, you and your partner can pay shared household expenses, such as mortgage, car payments, utilities and groceries, from the same place. Withdrawing cash, writing checks and making online payments from one account also allows both of you to see how money is being spent.

[Define customer response](#)

And then

[Go to another action](#)

Goes to action: End

Pass values

Upon return: Continue

[Edit settings](#) [Edit passed values](#)

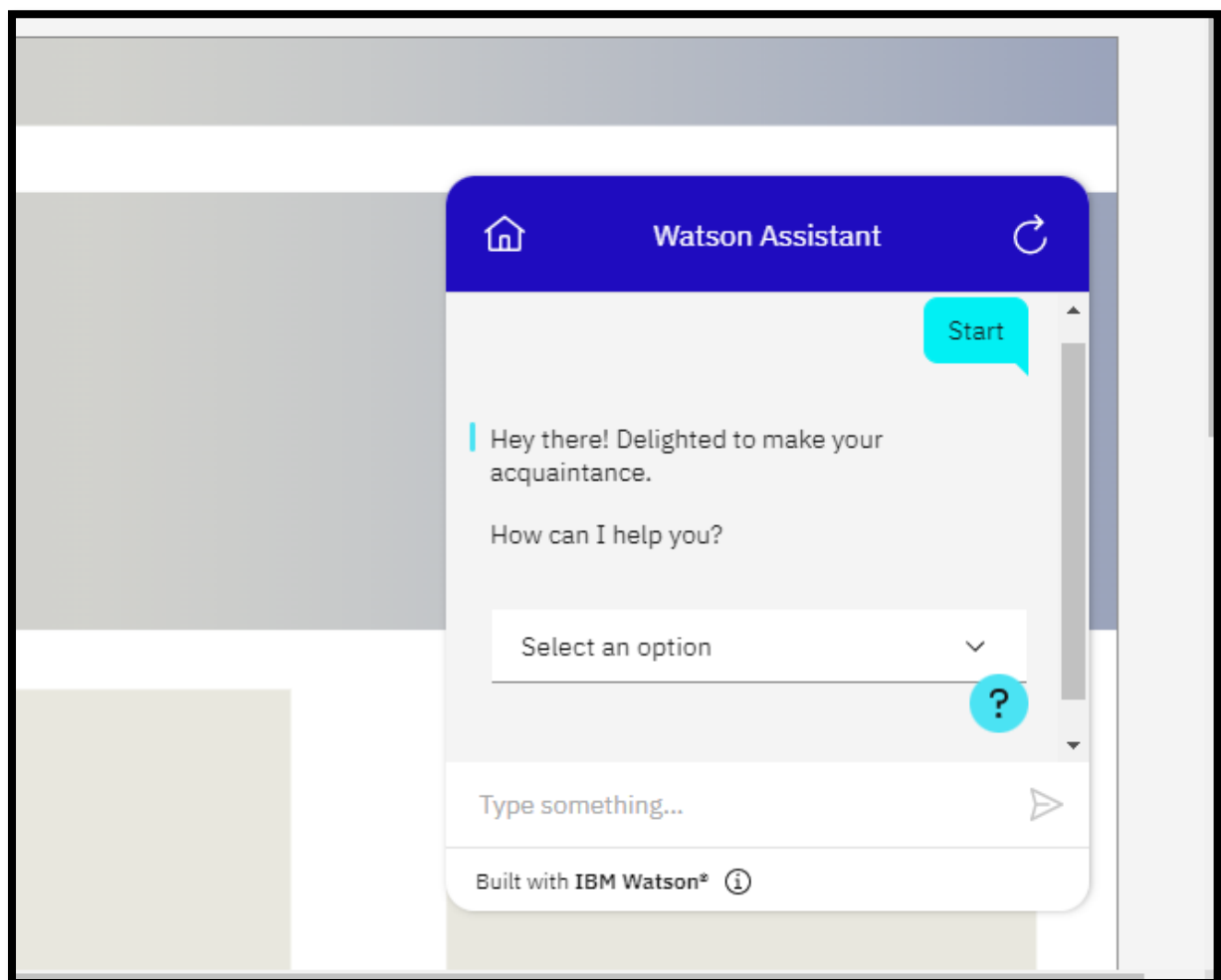
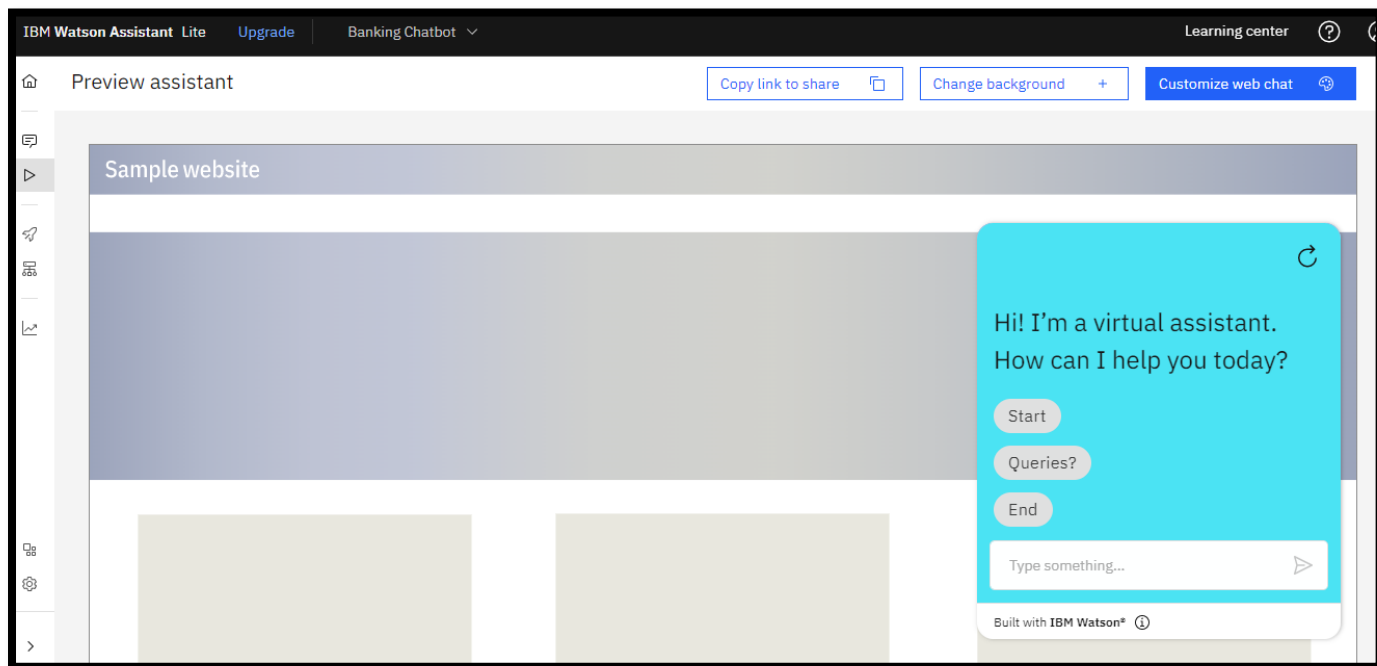
Creating contents and responses for “Net banking” Actions:

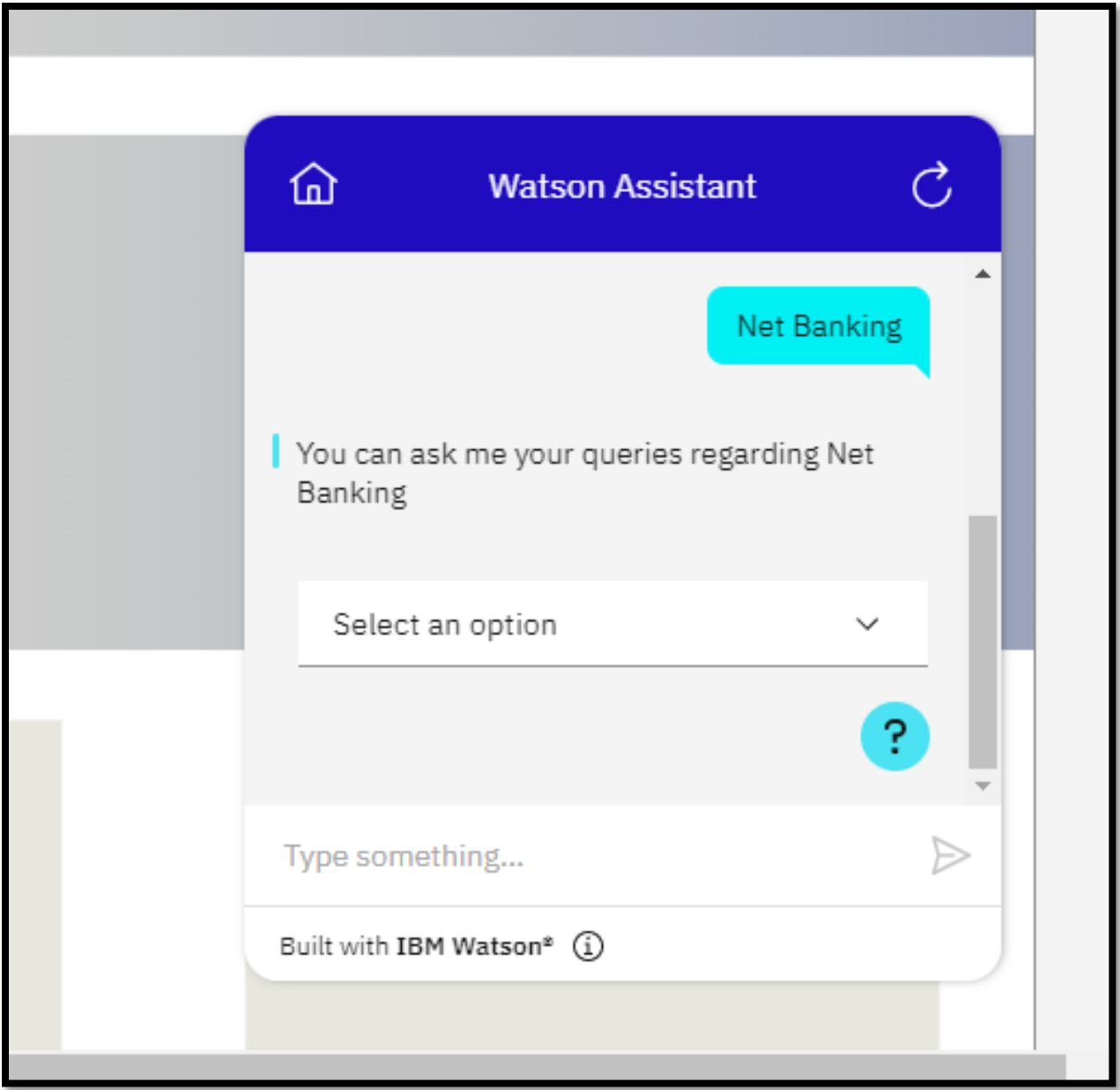
The screenshot displays the IBM Watson Assistant Lite interface for a 'Banking Chatbot'. The left sidebar shows a list of actions under the 'Net Banking' category. The main area shows the configuration for a specific action, 'What is the limit of tr...'. The configuration includes a 'Go to action: End' button, a list of steps (1, 5, 6, 7), and a 'Define customer response' section. The response text is 'The limit for a transaction for a standard account is 2 Lakhs INR.' The 'And then' section shows a 'Go to another action' button, which leads to the 'End' action. The 'Pass values' and 'Upon return' sections are also visible.

Customize the User Interface of the chat-bot

The screenshot displays the IBM Watson Assistant Lite interface for customizing the chat UI. The left sidebar shows the 'Customize your chat UI' section. The main area shows the configuration for the chat UI, including the assistant's name, primary and secondary colors, chat header, user message bubble, and accent color. The 'IBM Watermark' section is also visible. The right sidebar shows a preview of the chat UI with a blue background and a white chat bubble containing the text 'Hi! I'm a virtual assistant. How can I help you today?'. The 'Start', 'Queries?', and 'End' buttons are also visible.

Testing the chat-bot:







Watson Assistant



Net Banking

You can ask me your queries regarding Net Banking

What is the limit of transaction in o... ▾

What is the limit of transaction in online banking

The limit for a transaction for a standard account is 2 Lakhs INR.

Do you have some other queries?

Yes

No

