

Sprint – 3

Project Development Phase

Team ID	PNT2022TMID04164
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 text area for defining the response. The text includes instructions for adding personal details and saving changes. Below the text area is a "Define customer response" button.
- And then:** A section for configuring the flow after the action. It includes a "Go to another action" button and a table for defining the flow.

Goes to action	End
Pass values	
Upon return	Continue

At the bottom of the "And then" section are links for "Edit settings" and "Edit passed values".

Creating contents and responses for “Credit card” Actions:

The screenshot shows the IBM Watson Assistant Lite interface for the 'Credit Card' topic. The left pane displays a list of actions:

- 1 is **Card is going to expire**: 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**: 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**: You can login into our website here: link
 and enter your details, account number and IFSC...
Go to action: End

The right pane shows the response configuration for the selected action:

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.

Below the response is a section for 'And then' with a dropdown menu set to 'Go to another action'. The configuration table is as follows:

Goes to action	End
Pass values	
Upon return	Continue

Buttons for 'Edit settings' and 'Edit passed values' are at the bottom.

Creating contents and responses for “Current” Actions:

The screenshot shows the IBM Watson Assistant Lite interface for the 'Current' topic. The left pane displays a list of actions:

- Go to action: End
- 1 is **Standard**: Standard current accounts are bank accounts designed for everyday use, depositing...
Go to action: End
- 1 is **Foreign Currency**: A foreign currency account is a multi-currency borderless account that allows the account hold...
Go to action: End
- 1 is **Joint Account**: A joint account is a bank account that two or more individuals share. Joint account holders have...
Go to action: End

The right pane shows the response configuration for the selected action:

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.

Below the response is a section for 'And then' with a dropdown menu set to 'Go to another action'. The configuration table is as follows:

Goes to action	End
Pass values	
Upon return	Continue

Buttons for 'Edit settings' and 'Edit passed values' are at the bottom.

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:

- Action 1: 'I am facing errors in net banking.' (ID: 5). The response includes instructions: '1. Check your internet connectivity 2. Check if the bank account has sufficient amount to transfer...'. The action is set to 'Go to action: End'.
- Action 2: 'Forgot my password' (ID: 6). The response is: 'You can reset the password by clicking the link , and entering your credentials. You can reach out...'. The action is set to 'Go to action: End'.
- Action 3: 'What is the limit of tr...' (ID: 7). The response is: 'The limit for a transaction for a standard account is 2 Lakhs INR.'. The action is set to 'Go to action: End'.

The main workspace shows the configuration for the selected action (ID 7). It includes a text editor with the response: 'The limit for a transaction for a standard account is 2 Lakhs INR.'. Below the editor is a 'Define customer response' section. The 'And then' section shows a 'Go to another action' dropdown set to 'End'. The 'Goes to action' field is set to 'End'. The 'Pass values' and 'Upon return' fields are empty. The 'Continue' button is visible. At the bottom, there are links for 'Edit settings' and 'Edit passed values'.

Customize the User Interface of the chat-bot

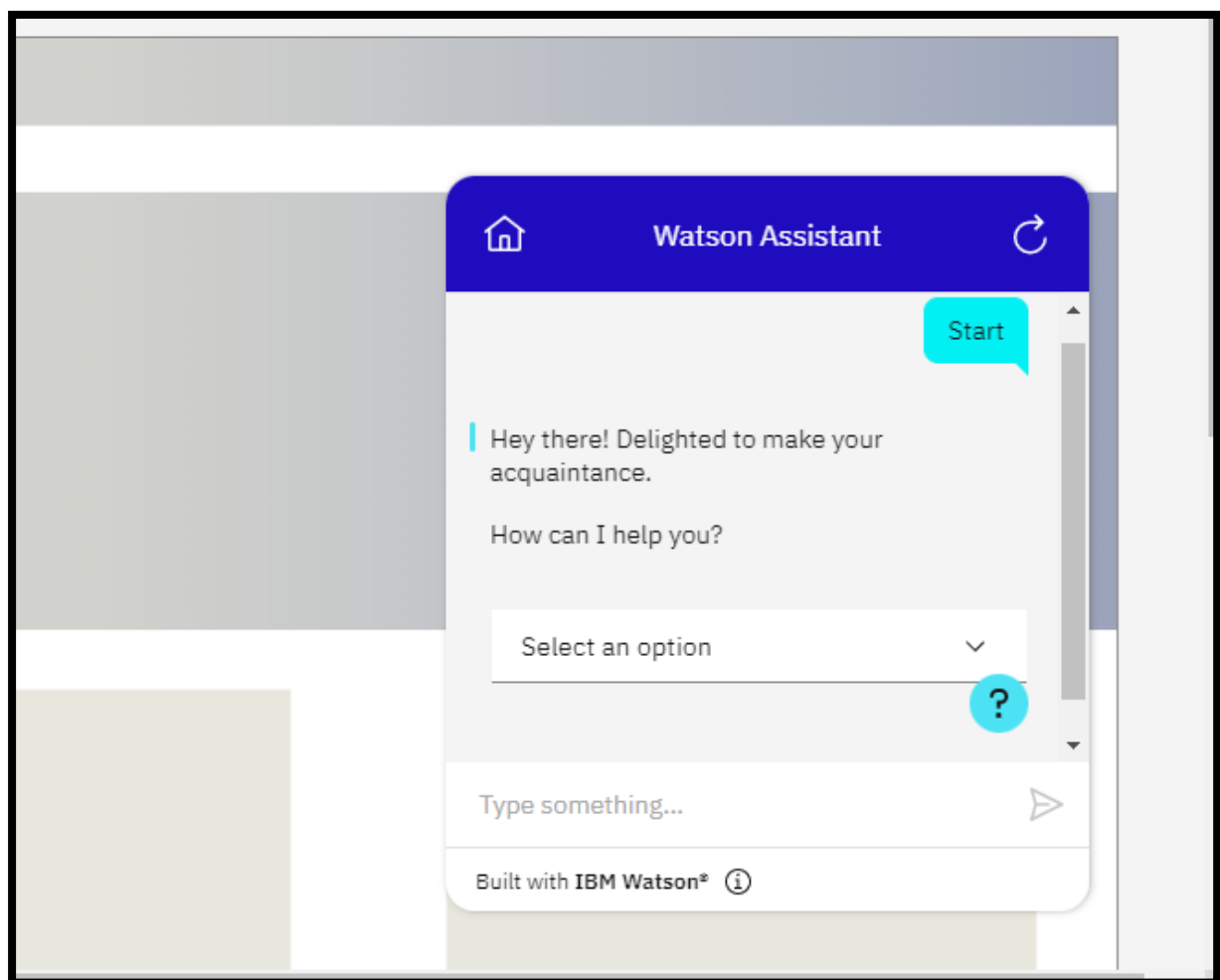
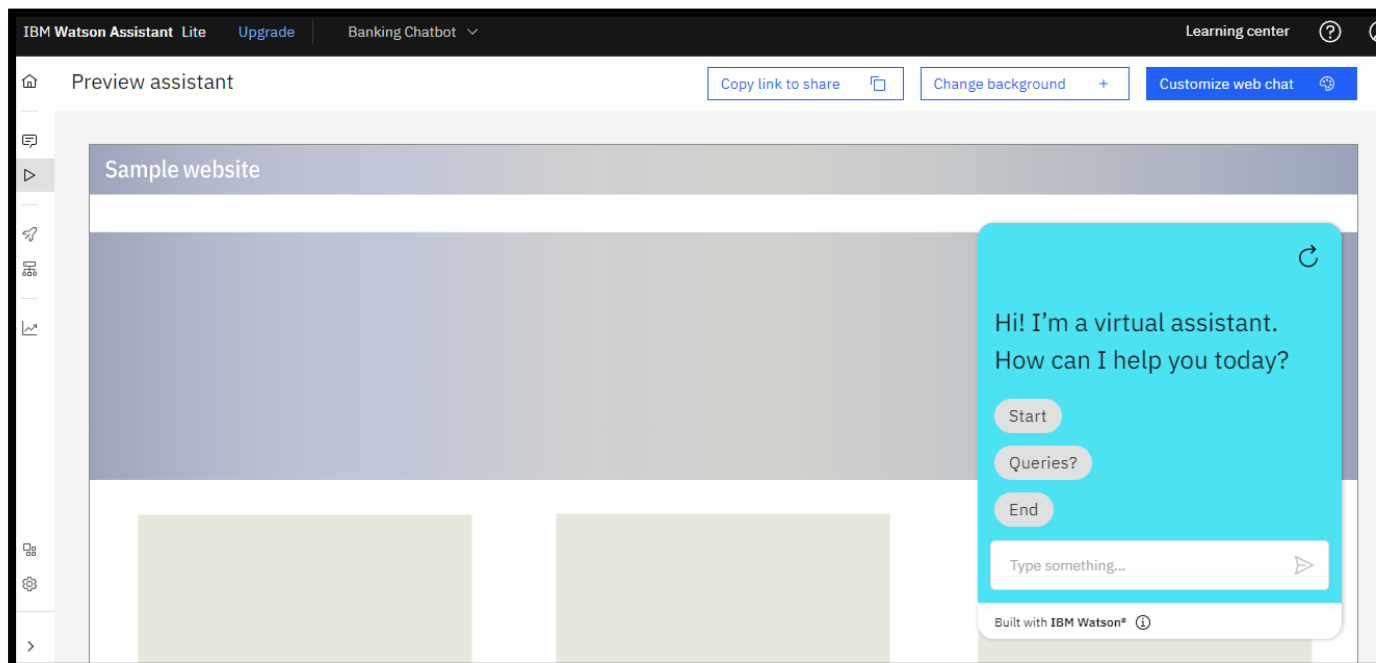
The screenshot shows the 'Web chat' customization interface. The top bar includes 'Close' and 'Save and exit' buttons. The main heading is 'Customize your chat UI' with a subtext: 'Update the style to match your brand and your website. A developer can also add more advanced styling changes with code. [Learn more](#)'. A 'Restart conversation' button is located in the top right.

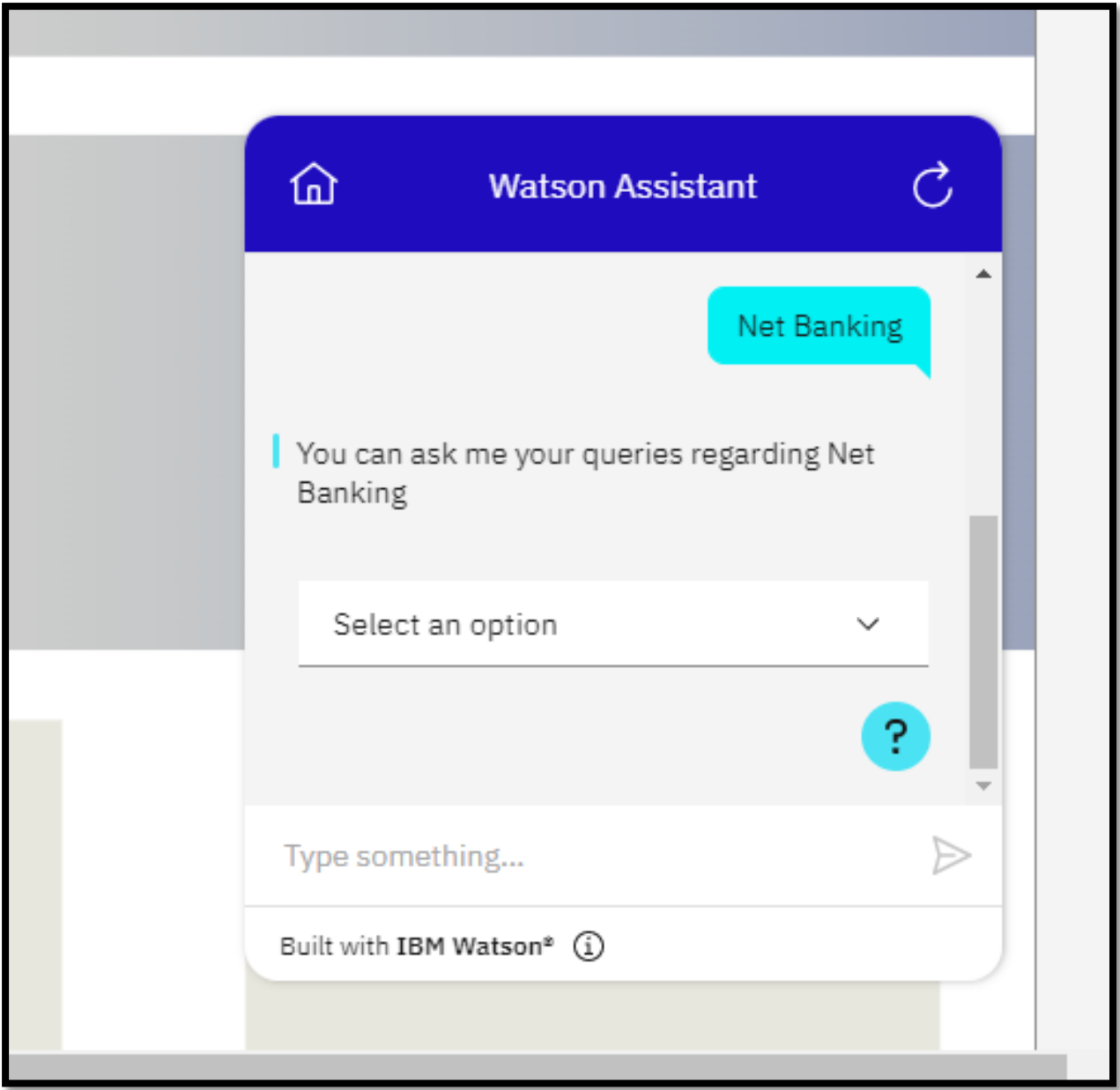
The customization options include:

- Assistant's name as known by customers: 'Watson Assistant'.
- Primary color: '#050fc4' (blue).
- Secondary color: '#41f1f4' (teal).
- Chat header: '#5ee4f4' (light blue).
- Significant and interactive objects: 'IBM Watermark' (plus icon).
- Displays a link to the Watson Assistant website: 'On' (toggle switch).

A preview of the chat UI is shown on the right, featuring a blue background with the text: 'Hi! I'm a virtual assistant. How can I help you today?'. Below the text are three buttons: 'Start', 'Queries?', and 'End'.

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

