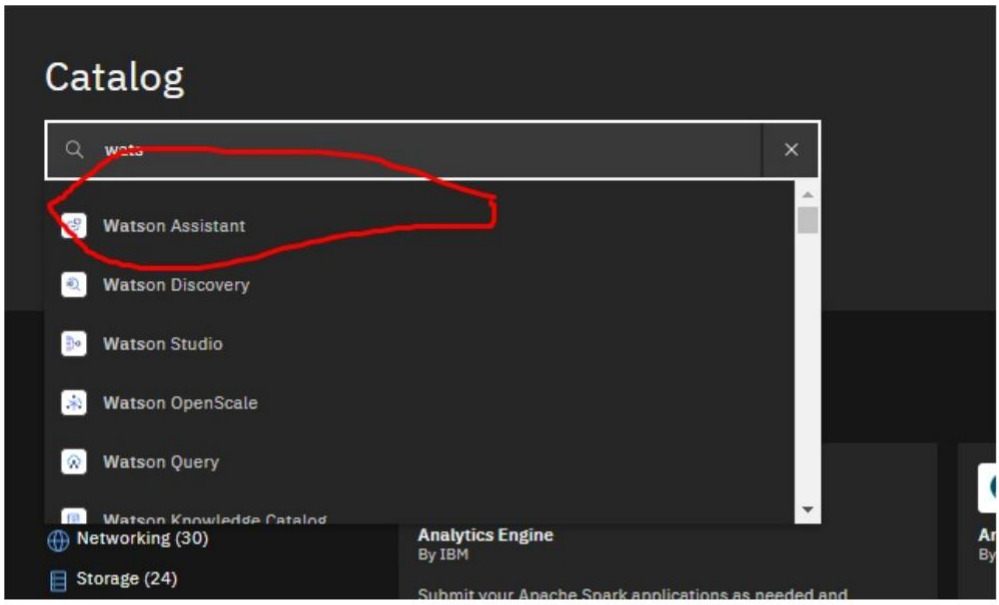
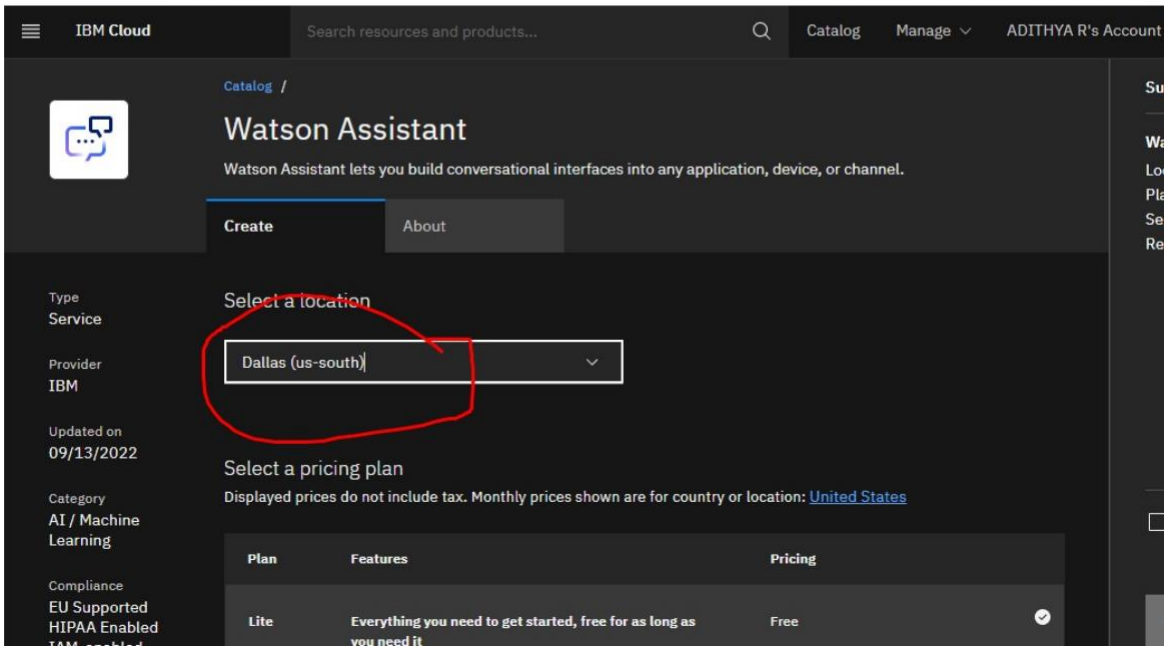
Project Development Phase
Sprint 1

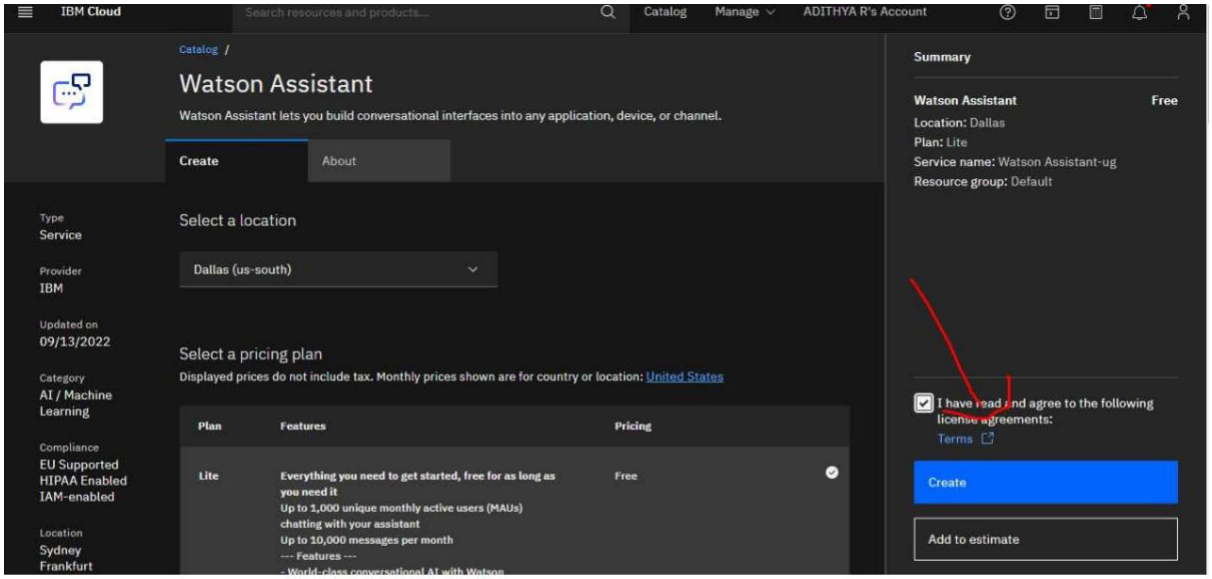
Date	29 October 2022
Team ID	PNP2022TMID03265
Project Name	AI BASED DISCOURSE FOR BANKING INDUSTRY

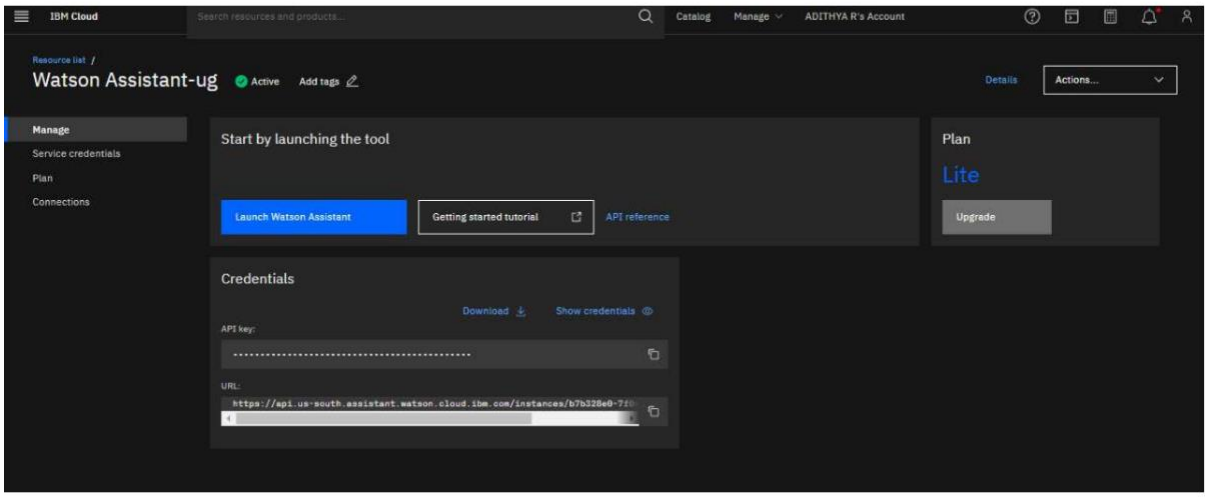
Screenshots of Sprint 1 Tasks:

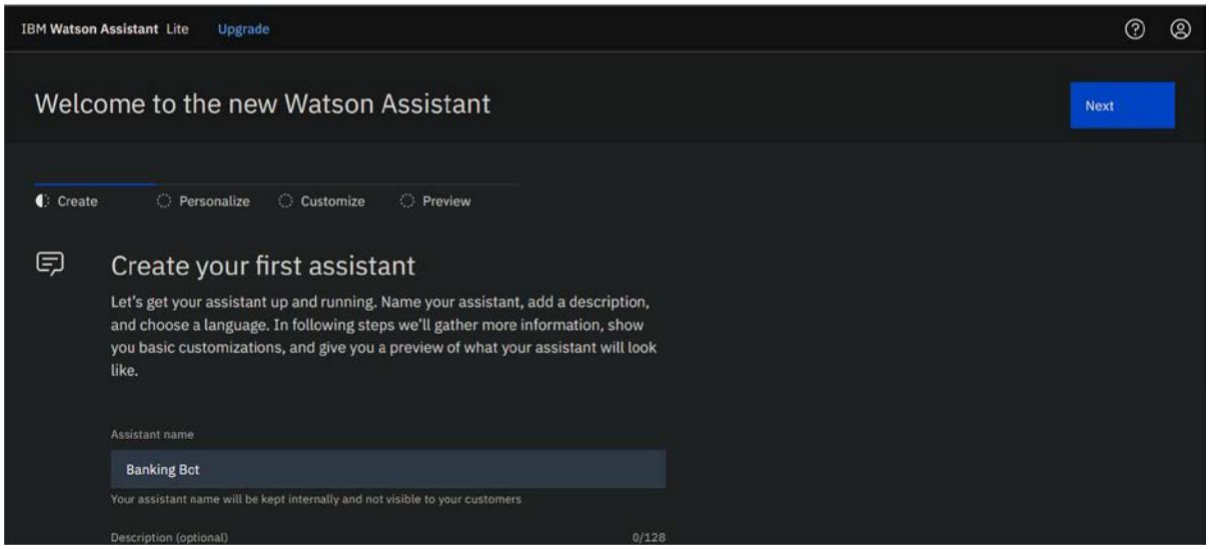
Create IBM Watson Assistant Service:

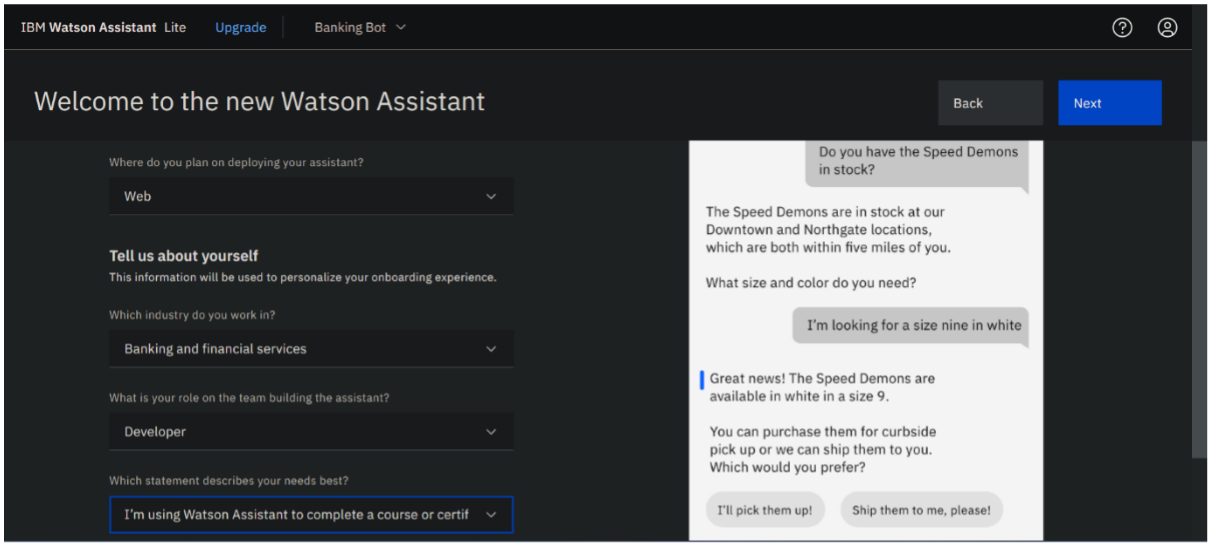


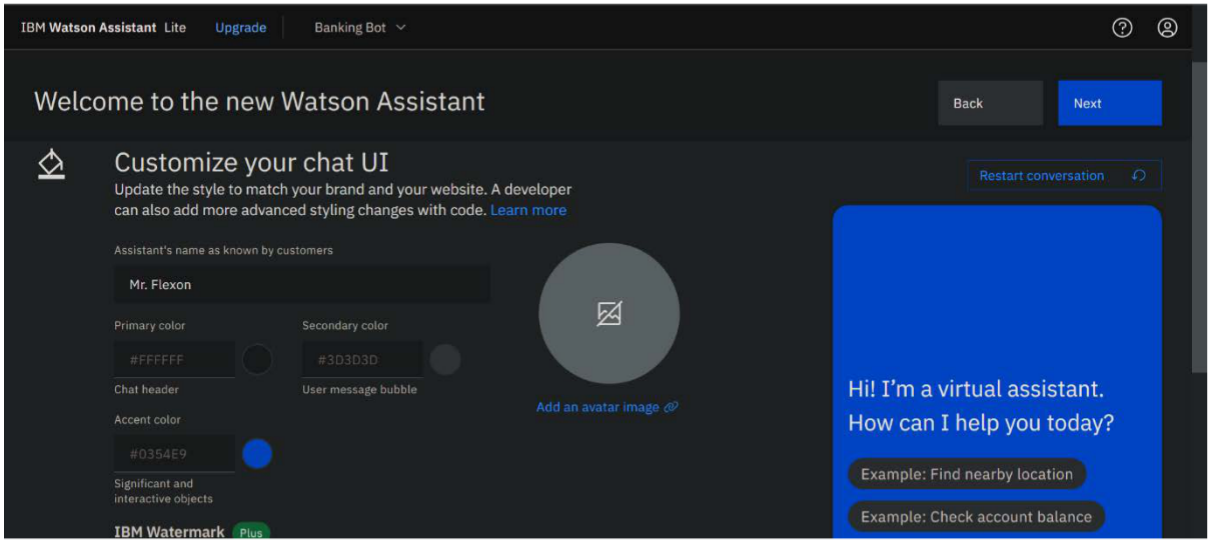


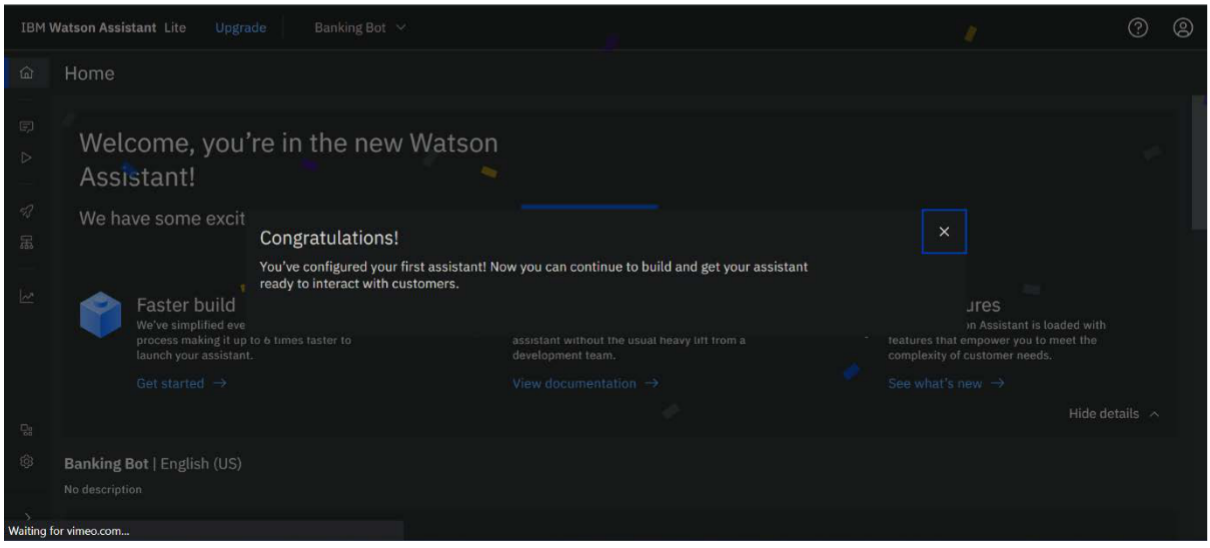

IBM Cloud
Search resources and products...
Catalog
Manage
ADITHYA R's Account
Catalog /
Watson Assistant
Watson Assistant lets you build conversational interfaces into any application, device, or channel.
Create
About
Type
Service
Provider
IBM
Updated on
09/13/2022
Category
AI / Machine Learning
Compliance
EU Supported
HIPAA Enabled
IAM-enabled
Location
Sydney
Frankfurt
Select a location
Dallas (us-south)
Select a pricing plan
Displayed prices do not include tax. Monthly prices shown are for country or location: United States
Plan
Features
Pricing
Lite
Everything you need to get started, free for as long as you need it
Up to 1,000 unique monthly active users (MAUs)
chatting with your assistant
Up to 10,000 messages per month
--- Features ---
Free
Summary
Watson Assistant
Free
Location: Dallas
Plan: Lite
Service name: Watson Assistant-ug
Resource group: Default
I have read and agree to the following license agreements:
Terms
Create
Add to estimate


IBM Cloud
Search resources and products...
Catalog
Manage
ADITHYA R's Account
Resource list /
Watson Assistant-ug
Active
Add tags
Details
Actions...
Manage
Service credentials
Plan
Connections
Start by launching the tool
Launch Watson Assistant
Getting started tutorial
API reference
Plan
Lite
Upgrade
Credentials
Download
Show credentials
API key:
URL:
https://api.us-south.assistant.watson.cloud.ibm.com/instances/b7b328e0-7f

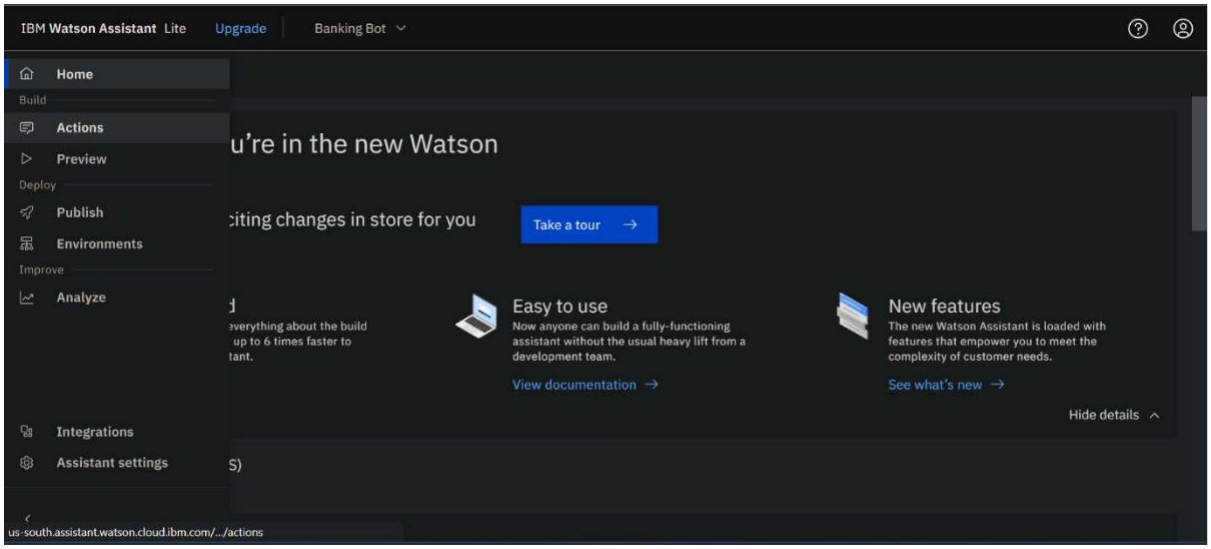

IBM Watson Assistant Lite
Upgrade
Welcome to the new Watson Assistant
Next
Create
Personalize
Customize
Preview
Create your first assistant
Let's get your assistant up and running. Name your assistant, add a description, and choose a language. In following steps we'll gather more information, show you basic customizations, and give you a preview of what your assistant will look like.
Assistant name
Banking Bot
Your assistant name will be kept internally and not visible to your customers
Description (optional)
0/128

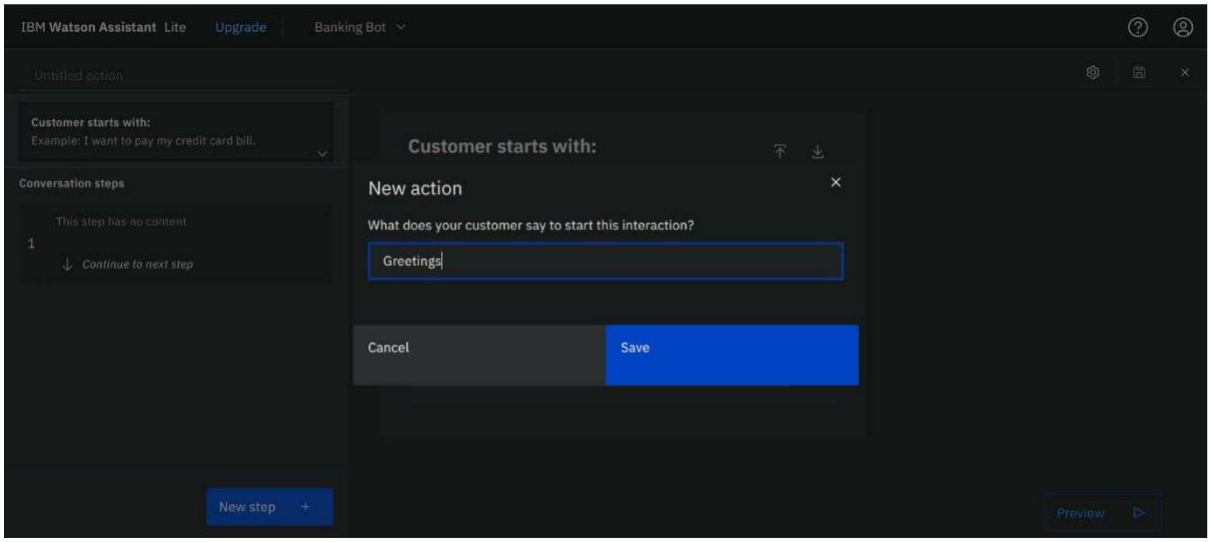

IBM Watson Assistant Lite
Upgrade
Banking Bot
Welcome to the new Watson Assistant
Back
Next
Where do you plan on deploying your assistant?
Web
Tell us about yourself
This information will be used to personalize your onboarding experience.
Which industry do you work in?
Banking and financial services
What is your role on the team building the assistant?
Developer
Which statement describes your needs best?
I'm using Watson Assistant to complete a course or certif
Do you have the Speed Demons in stock?
The Speed Demons are in stock at our Downtown and Northgate locations, which are both within five miles of you.
What size and color do you need?
I'm looking for a size nine in white
Great news! The Speed Demons are available in white in a size 9.
You can purchase them for curbside pick up or we can ship them to you. Which would you prefer?
I'll pick them up!
Ship them to me, please!

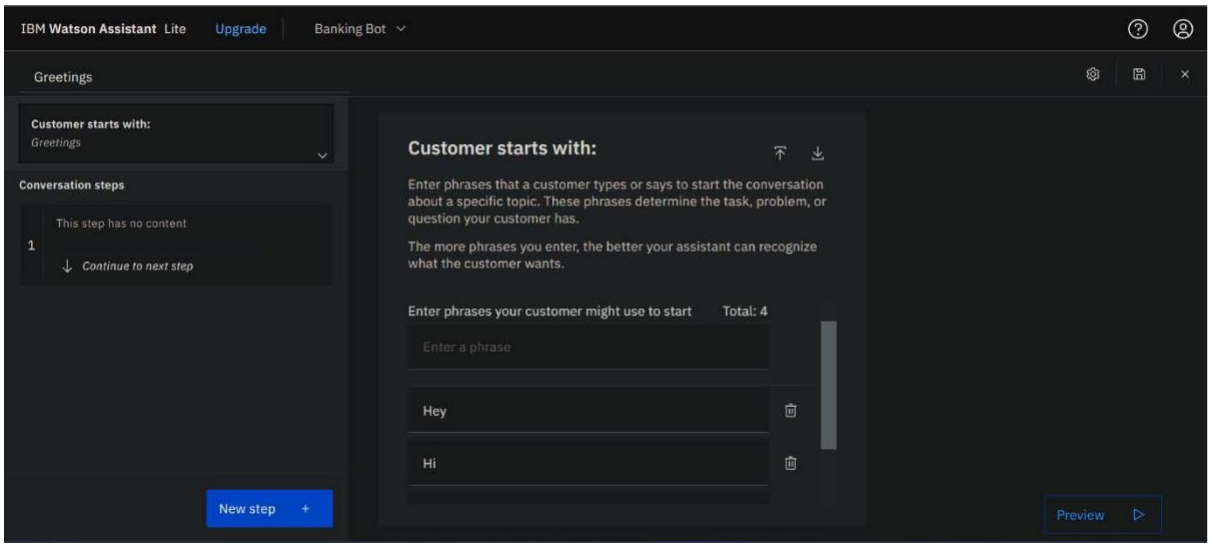

IBM Watson Assistant Lite
Upgrade
Banking Bot
Welcome to the new Watson Assistant
Back
Next
Customize your chat UI
Update the style to match your brand and your website. A developer can also add more advanced styling changes with code. Learn more
Assistant's name as known by customers
Mr. Flexon
Primary color
#FFFFFF
Chat header
Secondary color
#3D3D3D
User message bubble
Accent color
#0354E9
Significant and interactive objects
IBM Watermark
Plus
Add an avatar image
Restart conversation
Hi! I'm a virtual assistant. How can I help you today?
Example: Find nearby location
Example: Check account balance

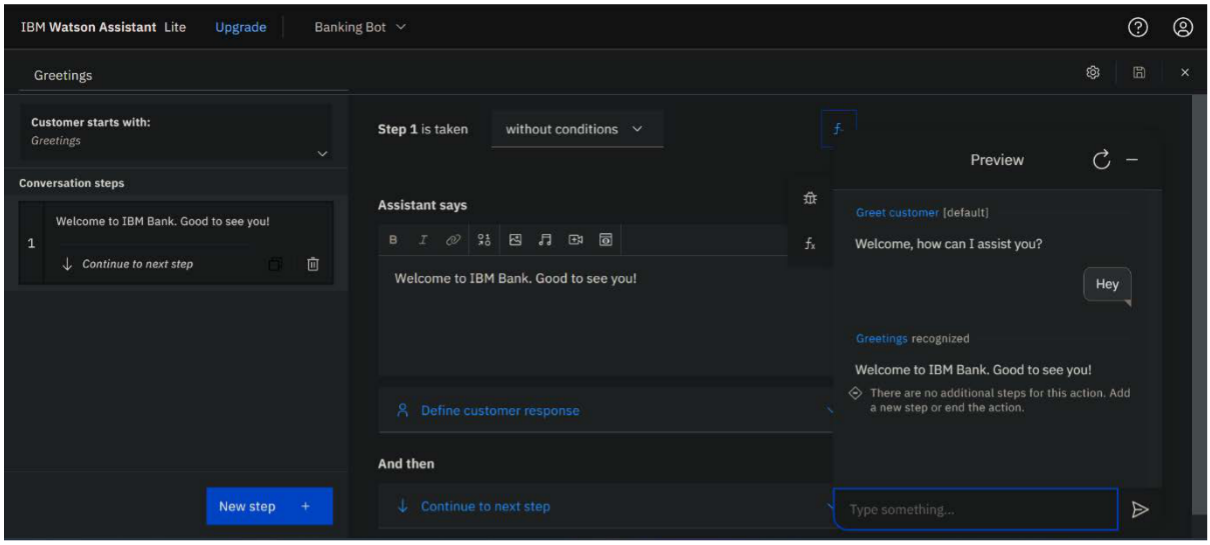

IBM Watson Assistant Lite
Upgrade
Banking Bot
Home
Welcome, you're in the new Watson Assistant!
We have some excit
Congratulations!
You've configured your first assistant! Now you can continue to build and get your assistant ready to interact with customers.
Faster build
We've simplified eve process making it up to 6 times faster to launch your assistant.
Get started
assistant without the usual heavy lift from a development team.
View documentation
ures
n Assistant is loaded with features that empower you to meet the complexity of customer needs.
See what's new
Hide details
Banking Bot | English (US)
No description
Waiting for vimeo.com...

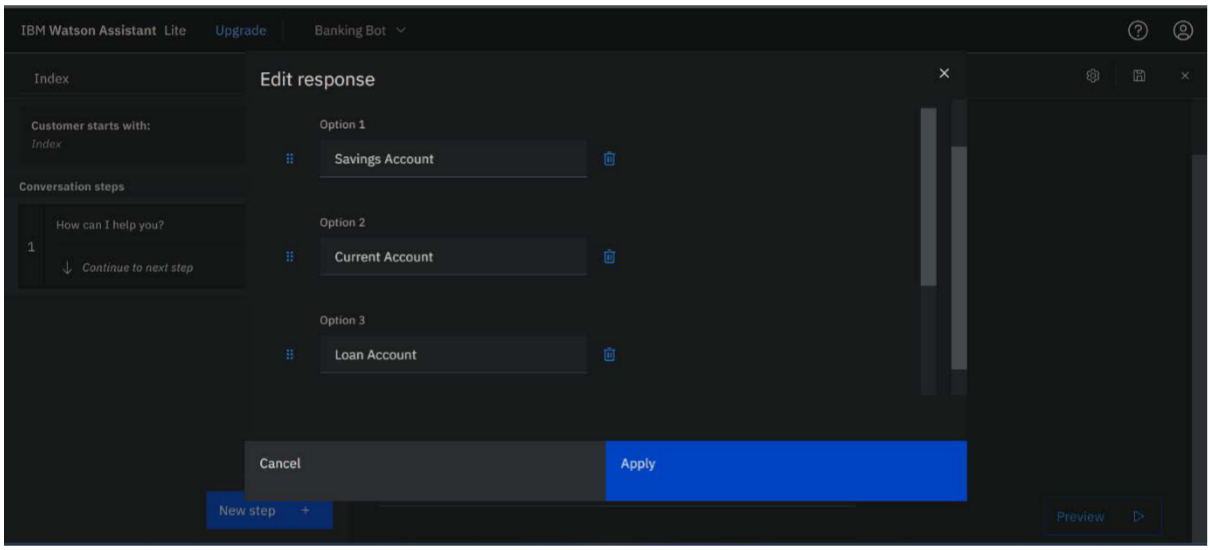
Chatbot Skills Creation:

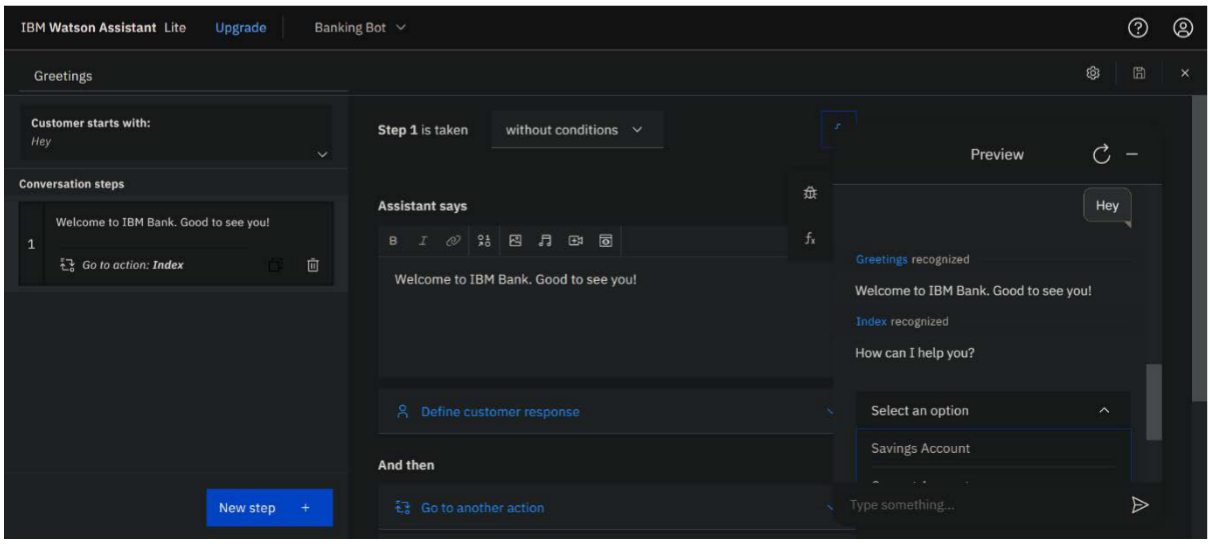


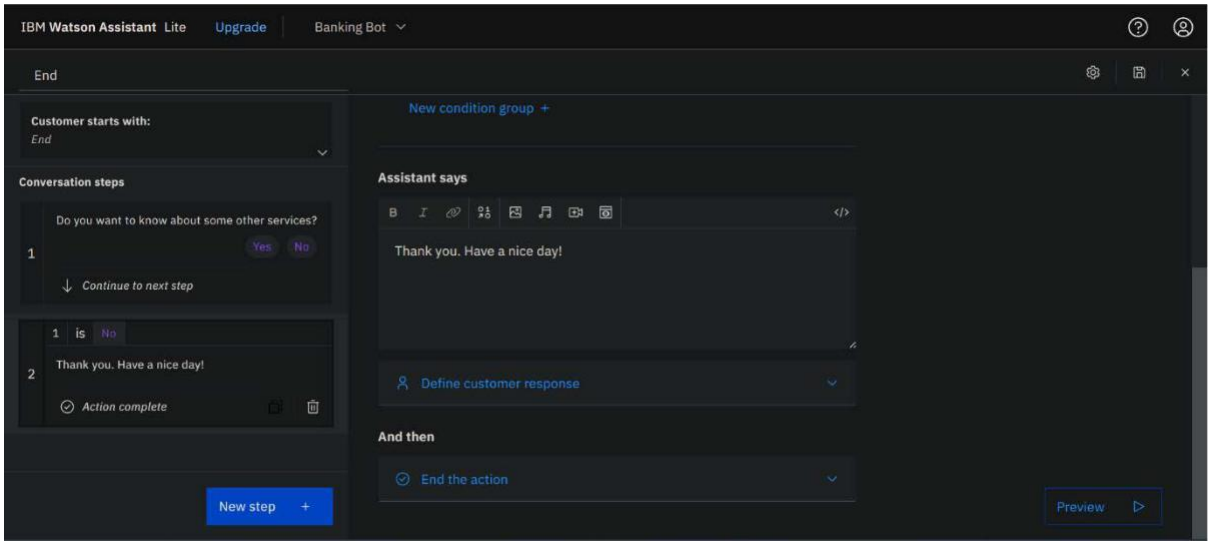




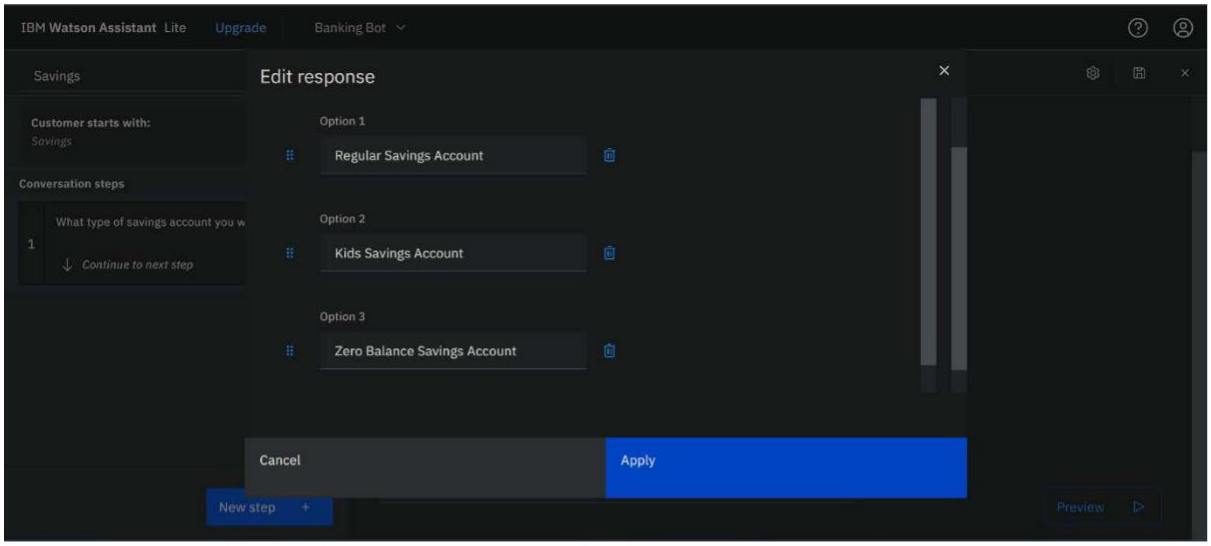

IBM Watson Assistant Lite
Upgrade
Banking Bot
Greetings
Customer starts with:
Greetings
Conversation steps
Welcome to IBM Bank. Good to see you!
Continue to next step
Step 1 is taken
without conditions
Assistant says
Welcome to IBM Bank. Good to see you!
Define customer response
And then
Continue to next step
New step
Preview
Greet customer [default]
Welcome, how can I assist you?
Hey
Greetings recognized
Welcome to IBM Bank. Good to see you!
There are no additional steps for this action. Add a new step or end the action.
Type something...

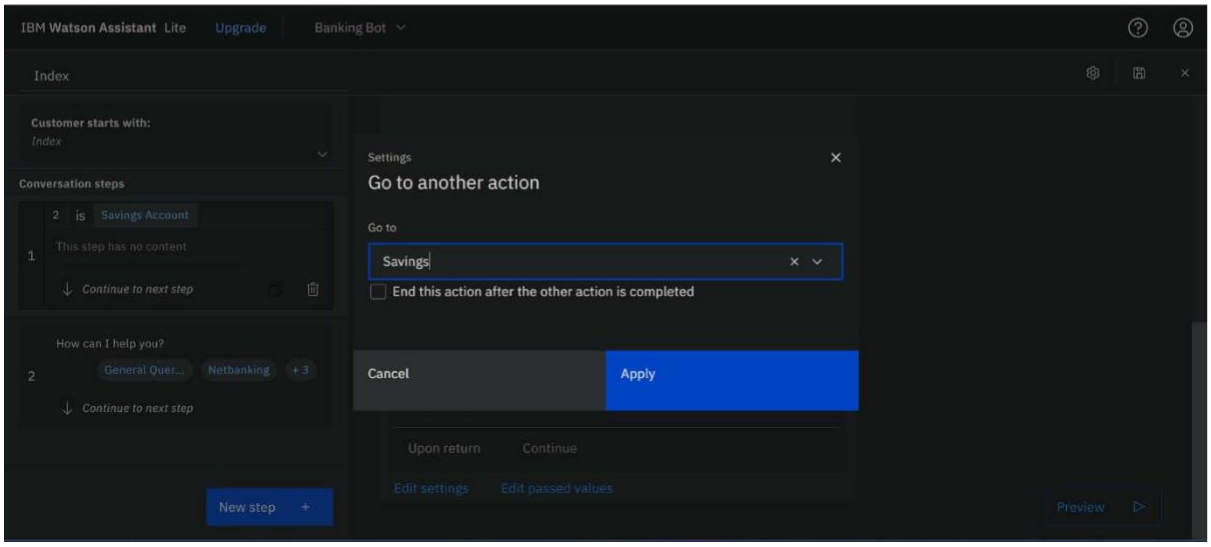

IBM Watson Assistant Lite
Upgrade
Banking Bot
Index
Customer starts with:
Index
Conversation steps
How can I help you?
Continue to next step
Edit response
Option 1
Savings Account
Option 2
Current Account
Option 3
Loan Account
Cancel
Apply
New step
Preview

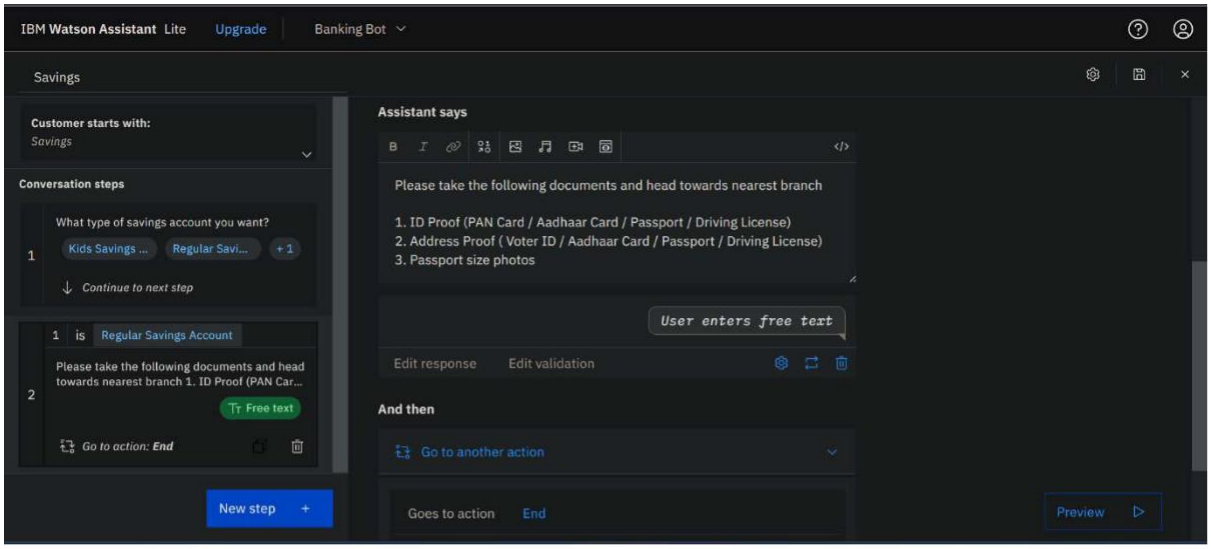

IBM Watson Assistant Lite
Upgrade
Banking Bot
Greetings
Customer starts with:
Hey
Conversation steps
Welcome to IBM Bank. Good to see you!
Go to action: Index
Step 1 is taken
without conditions
Assistant says
Welcome to IBM Bank. Good to see you!
Define customer response
And then
Go to another action
New step
Preview
Hey
Greetings recognized
Welcome to IBM Bank. Good to see you!
Index recognized
How can I help you?
Select an option
Savings Account
Type something...

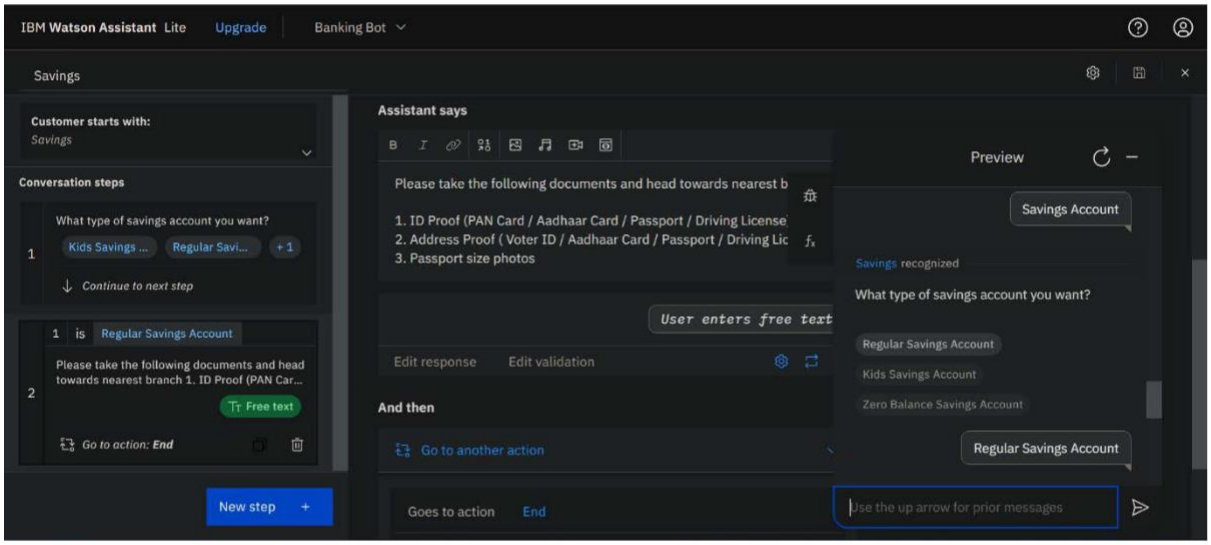


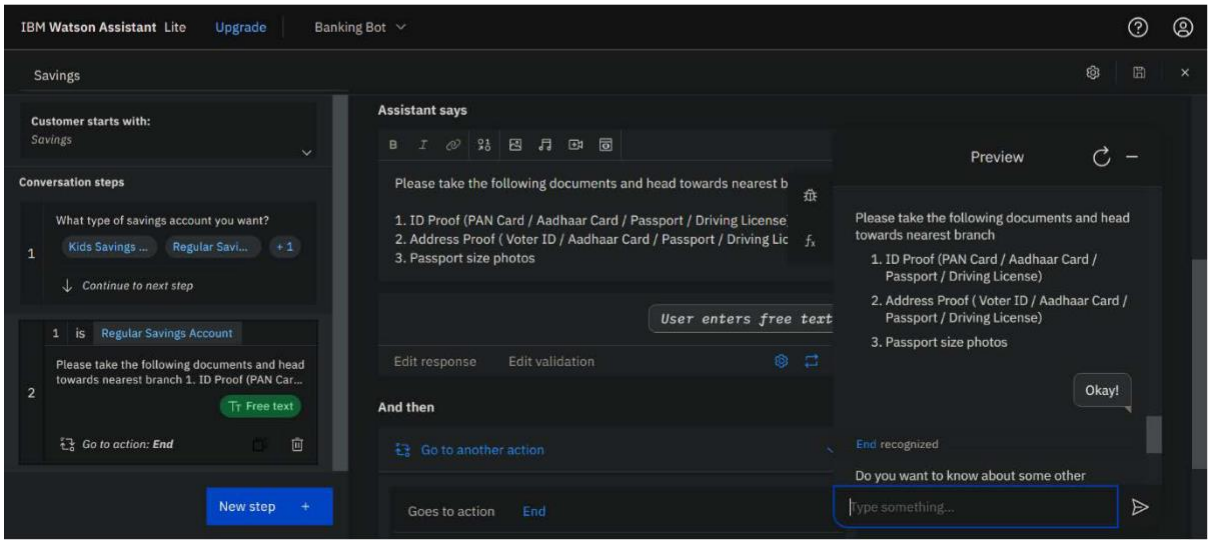
Creating Savings Account Action:

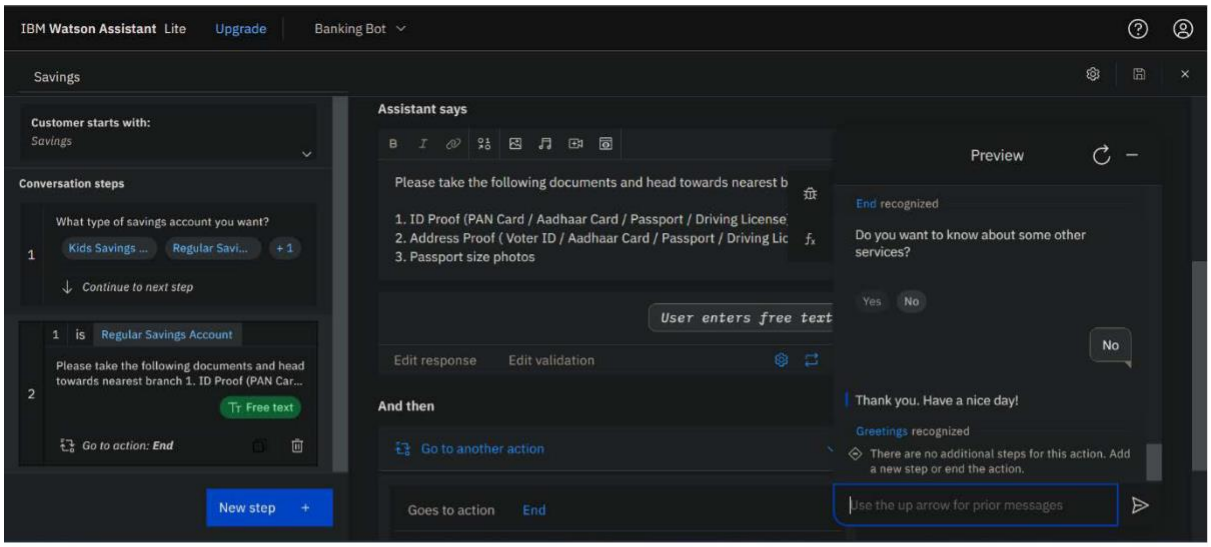


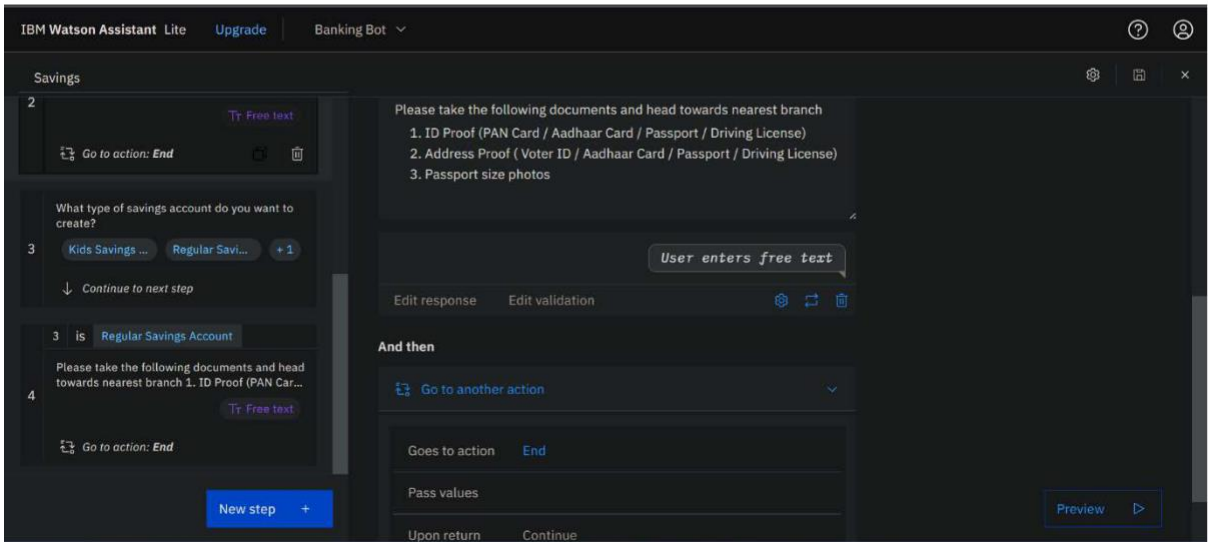



IBM Watson Assistant Lite
Upgrade
Banking Bot
Savings
Customer starts with:
Savings
Conversation steps
What type of savings account you want?
Kids Savings ...
Regular Savi...
+ 1
Continue to next step
1 is Regular Savings Account
Please take the following documents and head towards nearest branch 1. ID Proof (PAN Car...
Free text
Go to action: End
New step
Assistant says
Please take the following documents and head towards nearest branch
1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License)
2. Address Proof (Voter ID / Aadhaar Card / Passport / Driving License)
3. Passport size photos
User enters free text
Edit response
Edit validation
And then
Go to another action
Goes to action
End
Preview

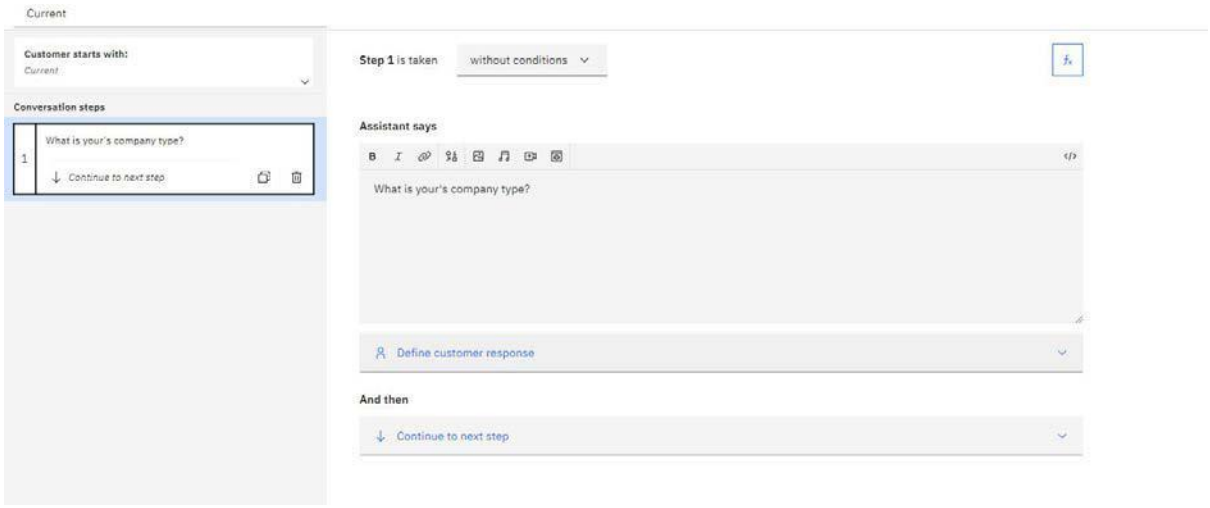

IBM Watson Assistant Lite
Upgrade
Banking Bot
Savings
Customer starts with:
Savings
Conversation steps
What type of savings account you want?
Kids Savings ...
Regular Savi...
+ 1
Continue to next step
1 is Regular Savings Account
Please take the following documents and head towards nearest branch 1. ID Proof (PAN Car...
Free text
Go to action: End
New step
Assistant says
Please take the following documents and head towards nearest b
1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License
2. Address Proof (Voter ID / Aadhaar Card / Passport / Driving Lic
3. Passport size photos
User enters free text
Edit response
Edit validation
And then
Go to another action
Goes to action
End
Preview
Savings Account
Savings recognized
What type of savings account you want?
Regular Savings Account
Kids Savings Account
Zero Balance Savings Account
Regular Savings Account
Use the up arrow for prior messages

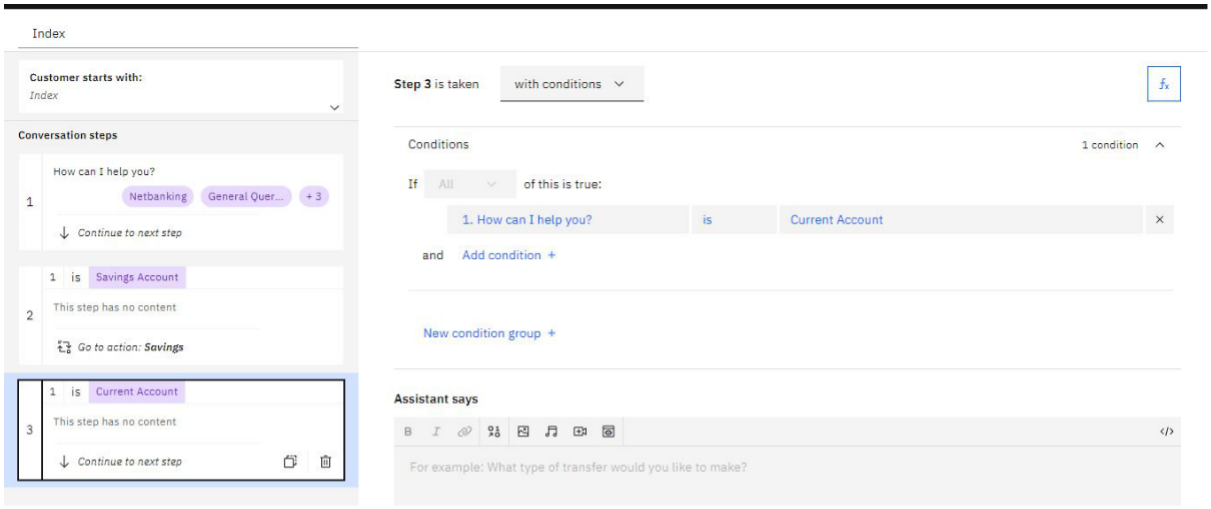

IBM Watson Assistant Lite
Upgrade
Banking Bot
Savings
Customer starts with:
Savings
Conversation steps
What type of savings account you want?
Kids Savings ...
Regular Savi...
+ 1
Continue to next step
1 is Regular Savings Account
Please take the following documents and head towards nearest branch 1. ID Proof (PAN Car...
Free text
Go to action: End
New step
Assistant says
Please take the following documents and head towards nearest b
1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License
2. Address Proof (Voter ID / Aadhaar Card / Passport / Driving Lic
3. Passport size photos
User enters free text
Edit response
Edit validation
And then
Go to another action
Goes to action
End
Preview
Please take the following documents and head towards nearest branch
1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License)
2. Address Proof (Voter ID / Aadhaar Card / Passport / Driving License)
3. Passport size photos
Okay!
End recognized
Do you want to know about some other
Type something...

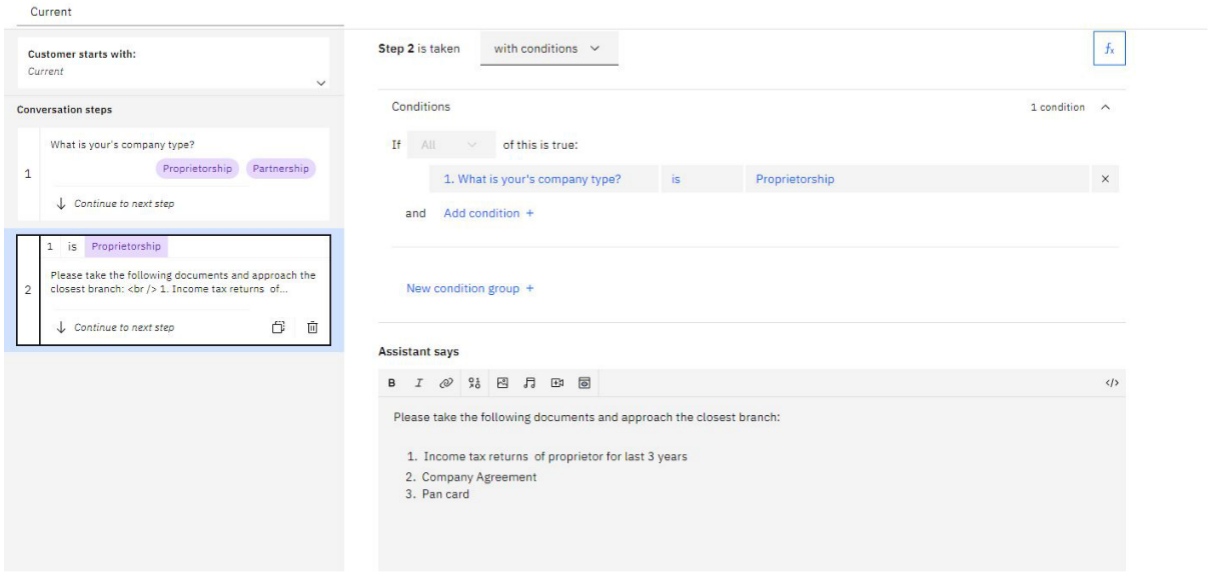


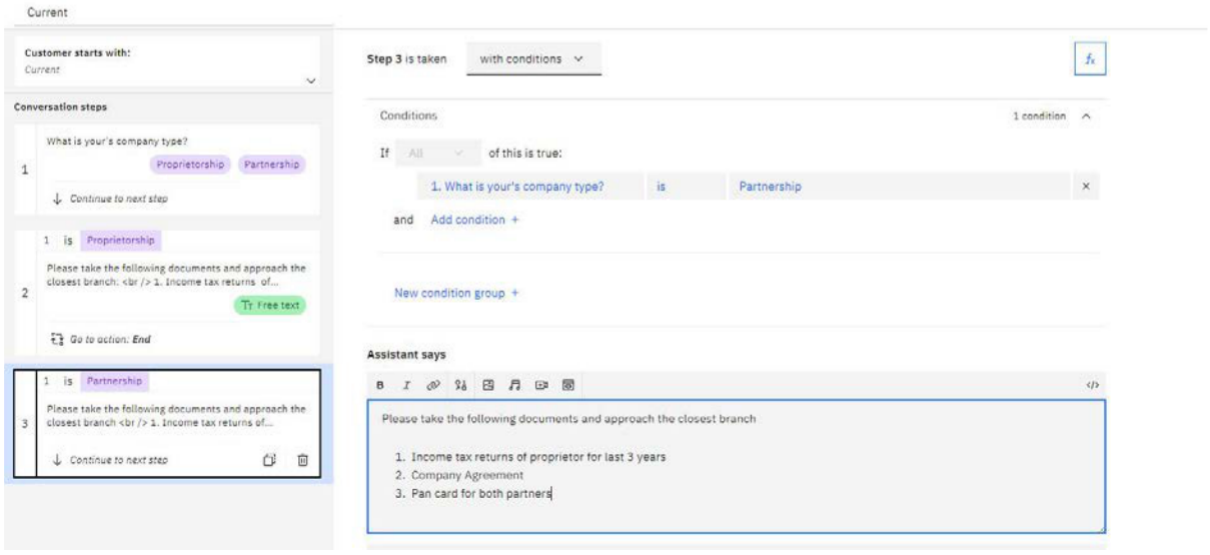


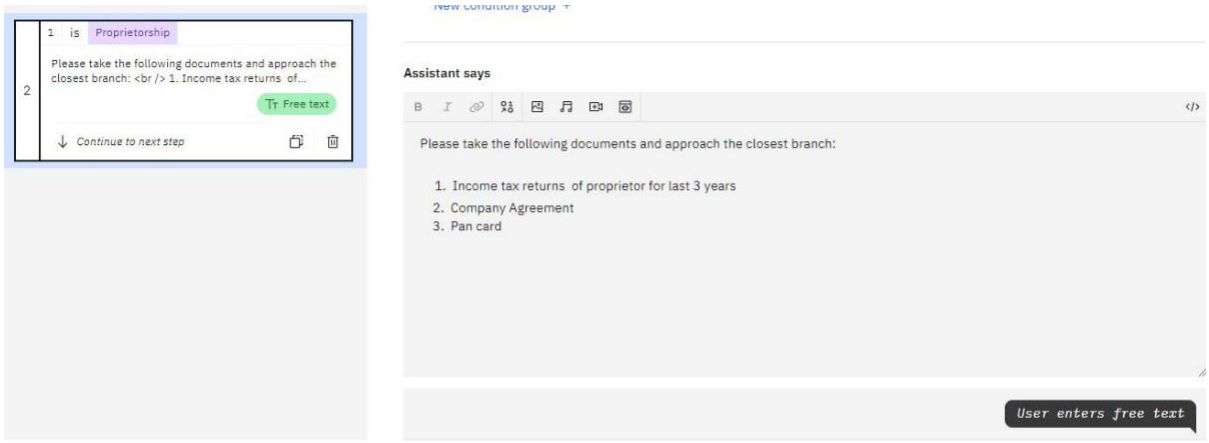
Creating Current Account Action:

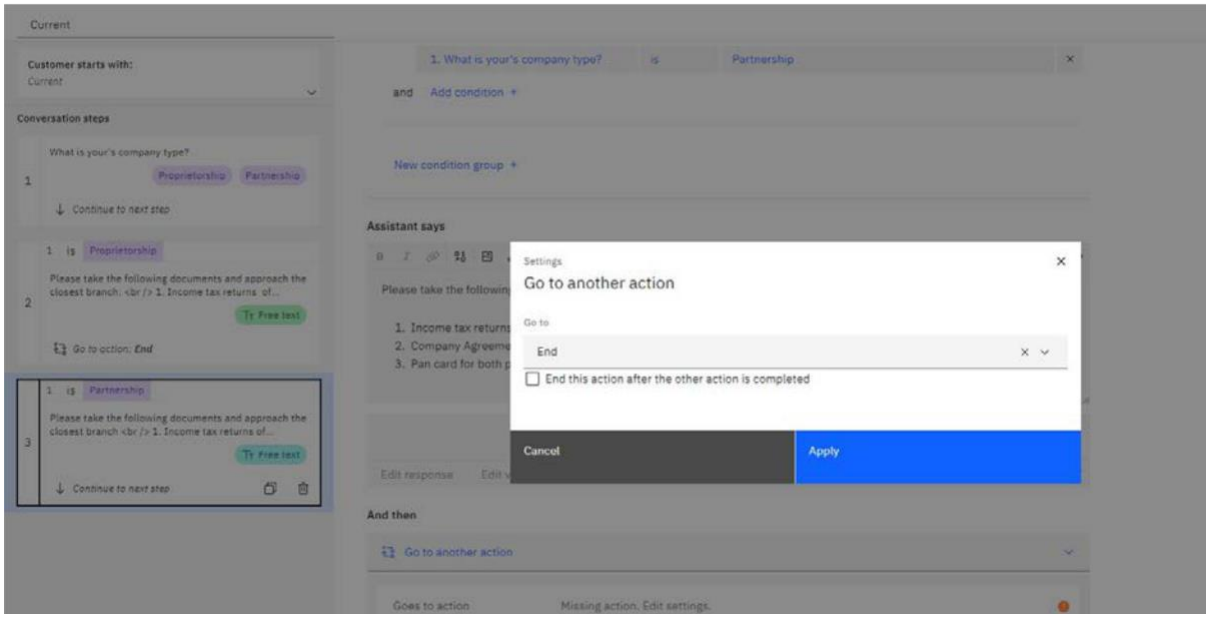



Index
Customer starts with:
Index
Conversation steps
1
How can I help you?
Netbanking
General Quer...
+ 3
Continue to next step
2
1 is Savings Account
This step has no content
Go to action: Savings
3
1 is Current Account
This step has no content
Continue to next step
Step 3 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. How can I help you?
is
Current Account
and
Add condition +
New condition group +
Assistant says
For example: What type of transfer would you like to make?


Current
Customer starts with:
Current
Conversation steps
1
What is your's company type?
Proprietorship
Partnership
Continue to next step
2
1 is Proprietorship
Please take the following documents and approach the closest branch:
 1. Income tax returns of...
Continue to next step
Step 2 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. What is your's company type?
is
Proprietorship
and
Add condition +
New condition group +
Assistant says
Please take the following documents and approach the closest branch:
1. Income tax returns of proprietor for last 3 years
2. Company Agreement
3. Pan card


Current
Customer starts with:
Current
Conversation steps
1
What is your's company type?
Proprietorship
Partnership
Continue to next step
2
1 is Proprietorship
Please take the following documents and approach the closest branch:
 1. Income tax returns of...
Free text
Go to action: End
3
1 is Partnership
Please take the following documents and approach the closest branch
 1. Income tax returns of...
Continue to next step
Step 3 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. What is your's company type?
is
Partnership
and
Add condition +
New condition group +
Assistant says
Please take the following documents and approach the closest branch
1. Income tax returns of proprietor for last 3 years
2. Company Agreement
3. Pan card for both partners


1 is Proprietorship
Please take the following documents and approach the closest branch:
 1. Income tax returns of...
Free text
Continue to next step
2
New condition group +
Assistant says
Please take the following documents and approach the closest branch:
1. Income tax returns of proprietor for last 3 years
2. Company Agreement
3. Pan card
User enters free text


Current
Customer starts with:
Current
Conversation steps
What is your's company type?
Proprietorship
Partnership
Continue to next step
1 is Proprietorship
Please take the following documents and approach the closest branch:
 1. Income tax returns of...
Free text
Go to action: End
1 is Partnership
Please take the following documents and approach the closest branch
 1. Income tax returns of...
Free text
Continue to next step
1. What is your's company type?
is
Partnership
and
Add condition +
New condition group +
Assistant says
Please take the following
1. Income tax returns
2. Company Agreeme
3. Pan card for both p
Settings
Go to another action
Go to
End
End this action after the other action is completed
Cancel
Apply
Edit response
And then
Go to another action
Goes to action
Missing action. Edit settings.