

Project Development Phase Sprint 1

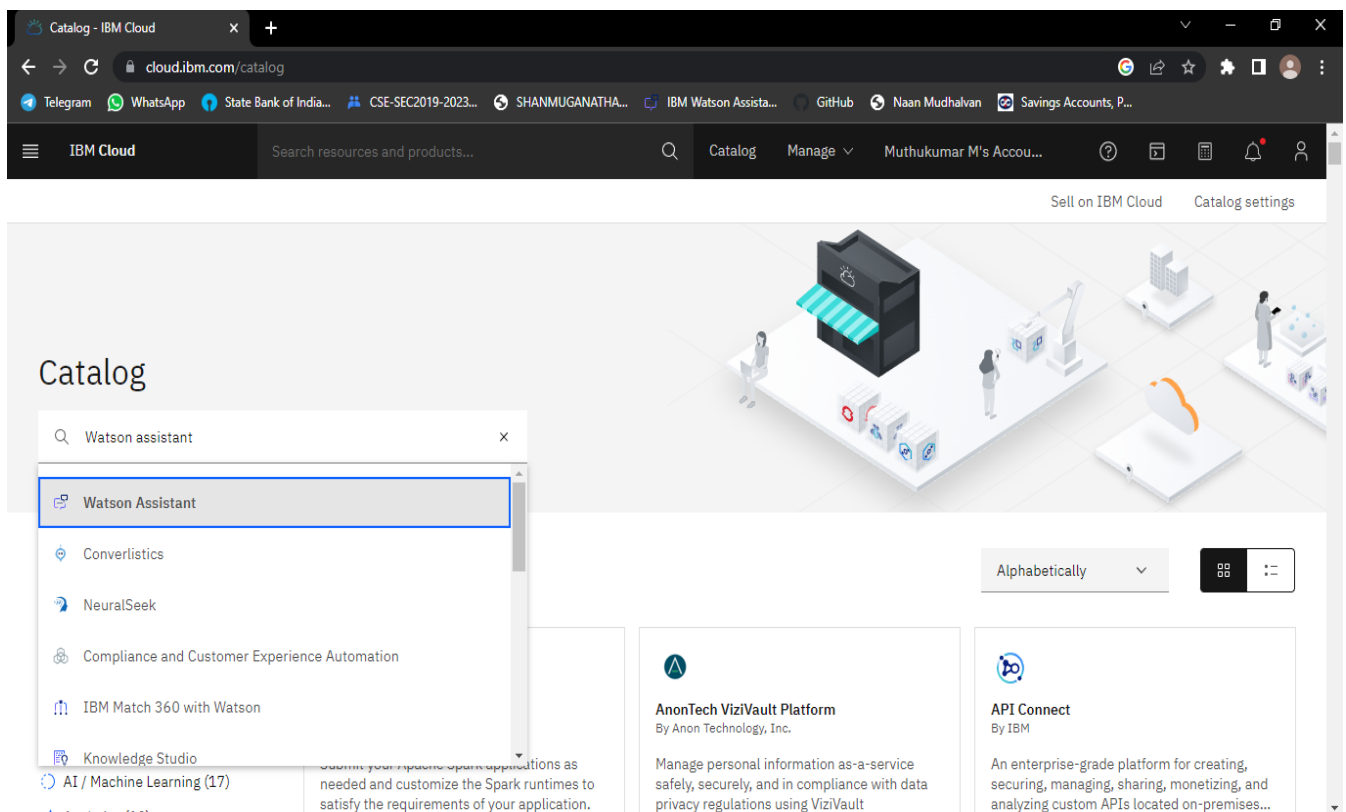
Date	02 November 2022
Team ID	PNT2022TMID48085
Project Name	Project – AI BASED DISCOURSE FORBANKING INDUSTRY

Sprint 1:

- 1.Create IBM Watson Assistant Service
- 2.Chatbot Skills Creation
- 3.Creating Saving Account Action

1.Create IBM Watson Assistant Service

1.1 IBM cloud → Open Catalog → Search the Watson Assistant → Next choose the Watson Assistant.



1.2 Select a location → Dallas(US-South) → Click the checkbox and Create the Watson Assistant.

The screenshot shows the IBM Cloud Watson Assistant catalog page. The browser address bar displays `cloud.ibm.com/catalog/services/watson-assistant`. The page header includes the IBM Cloud logo, a search bar, and navigation links for Catalog, Manage, and the user's account (Muthukumar M's Account). The main content area is titled "Watson Assistant" and includes a "Create" tab. On the left, a sidebar lists service details: Type (Service), Provider (IBM), Last updated (10/31/2022), Category (AI / Machine Learning), Compliance (EU Supported, HIPAA Enabled, IAM-enabled), and Location. The main content area has two sections: "Select a location" with a dropdown menu set to "Dallas (us-south)", and "Select a pricing plan" with a table of plans. The table has columns for Plan, Features, and Pricing. The "Lite" plan is selected, showing features like "Up to 1,000 unique monthly active users (MAUs) chatting with your assistant" and "Up to 10,000 messages per month". A "Create" button is visible on the right side of the page.

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	Free

1.3 Create the Watson Assistant name & Description → Click the Next.

The screenshot shows the "Create your first assistant" page in the IBM Watson Assistant console. The browser address bar displays `us-south.assistant.watson.cloud.ibm.com/crn%3Aav1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2Fd857d2b4a7b446b8879125e0bd16454c%3A45f...`. The page header includes the IBM Watson Assistant logo and an "Upgrade" button. The main content area is titled "Create your first assistant" and includes a "Next" button. Below the title, there is a section for "Assistant name" with a text input field containing "chatbot". A note states: "Your assistant name will be kept internally and not visible to your customers". Below this, there is a section for "Description (optional)" with a text area containing "AI BASED DISCOURSE FOR BANKING INDUSTRY". The page also includes a progress bar at the top with steps: Create, Personalize, Customize, and Preview.

1.4 Choose the Industry → Banking and Financial Services & Click the next

IBM Watson Assistant

Welcome to the new Watson Assistant

Back Next

Tell us about yourself
This information will be used to personalize your onboarding experience.

Which industry do you work in?

- Banking and financial services
- E-commerce
- Healthcare
- Hospitality
- Insurance
- Retail
- Software
- Telecommunications
- Transportation
- Utilities
- Other
- N/A (I am a student)

Not sure at this time.

Downtown and Wroughtgate 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!

Type something...

1.5 Customize the chat UI (Primary, Secondary & Accent Color) → Next

IBM Watson Assistant

Welcome to the new Watson Assistant

Back Next

Create Personalize **Customize** Preview

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](#)

Restart conversation

Assistant's name as known by customers

Watson Assistant

Primary color #FFFFFF

Secondary color #3D3D3D

Chat header

User message bubble

Accent color #0354E9

Significant and interactive objects

IBM Watermark Plus

Displays a link to the Watson Assistant website

On

Add an avatar image

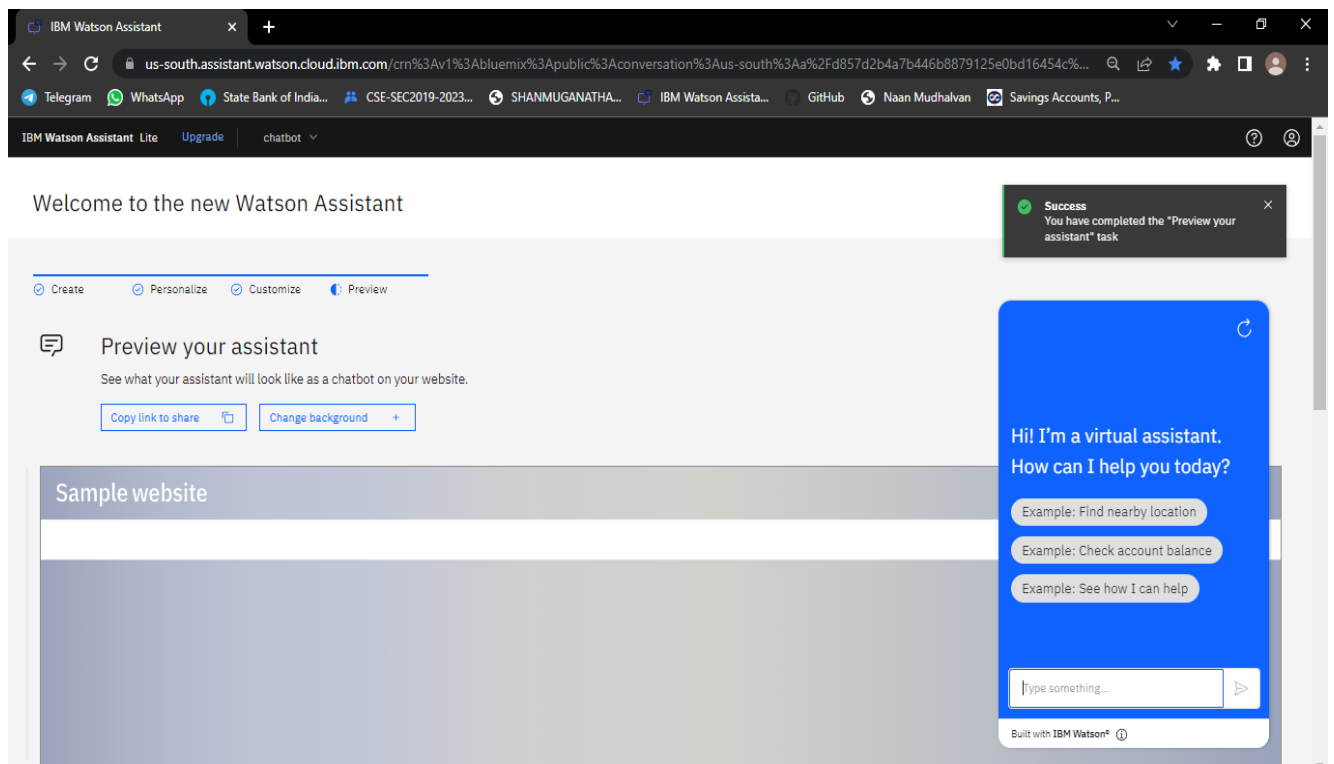
Hi! I'm a virtual assistant. How can I help you today?

Example: Find nearby location

Example: Check account balance

Example: See how I can help

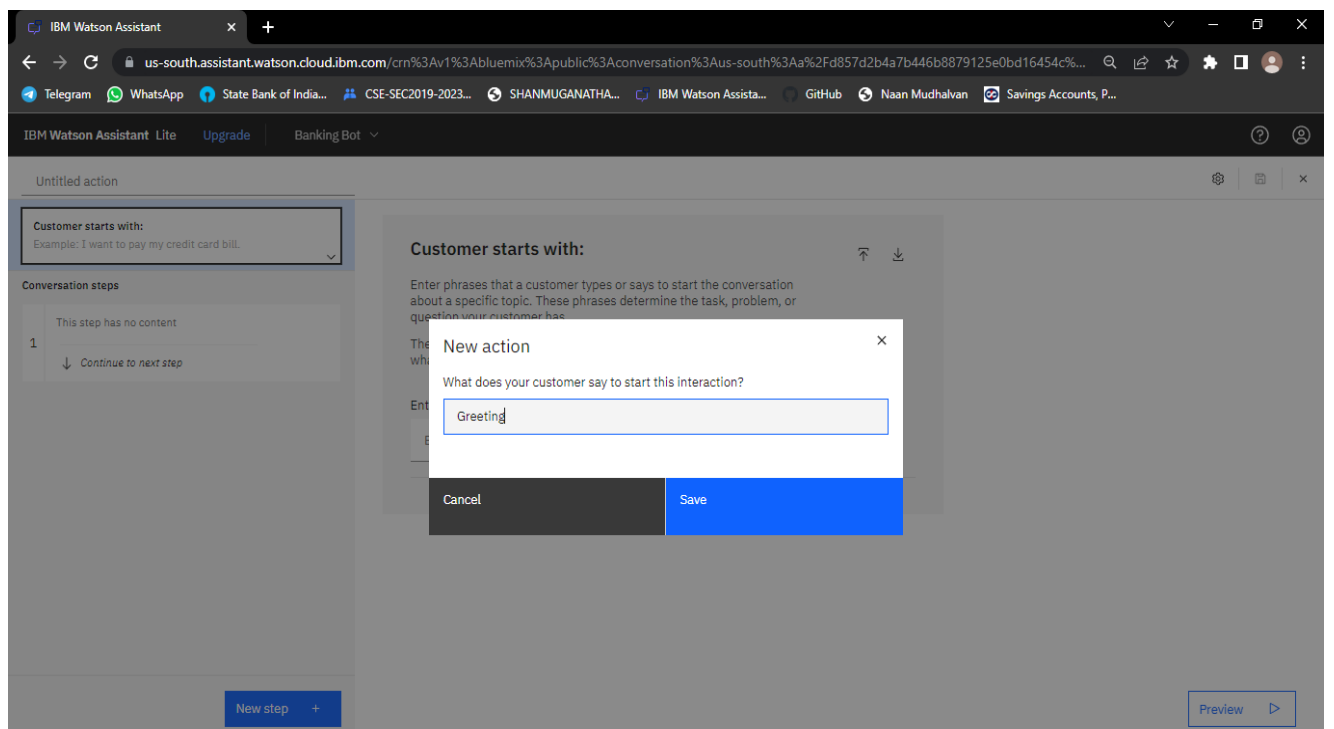
1.6 Watson Assistant service will be created successfully.



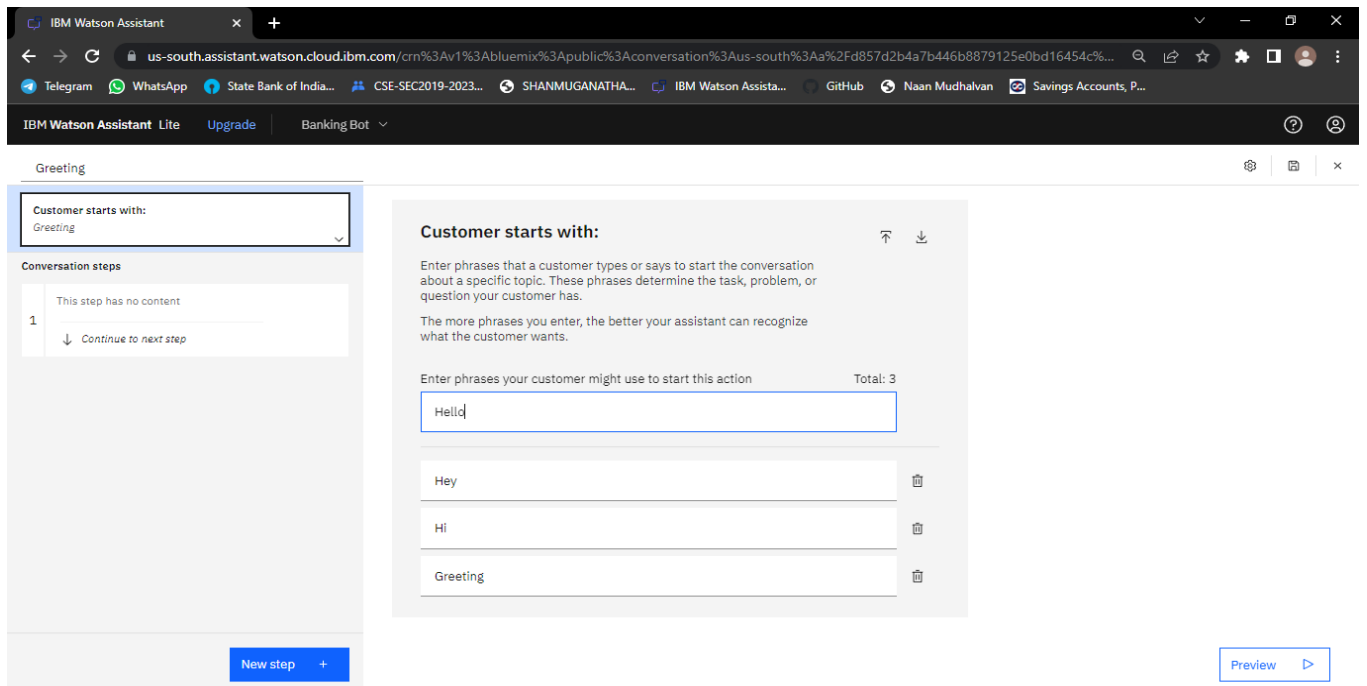
2.Chatbot Skills Creation

- Greeting
- Index
- End

2.1 Create the New Action Greeting→Click the save



2.2 Create the Customers Starts with (Hi, Hello, Hey) & Create the **Conversation step 1**.



IBM Watson Assistant Lite Upgrade Banking Bot

Greeting

Customer starts with:
Greeting

Conversation steps

1 This step has no content
Continue to next step

New step +

Customer starts with:

Enter phrases that a customer types or says to start the conversation about a specific topic. These phrases determine the task, problem, or question your customer has.

The more phrases you enter, the better your assistant can recognize what the customer wants.

Enter phrases your customer might use to start this action Total: 3

Hello

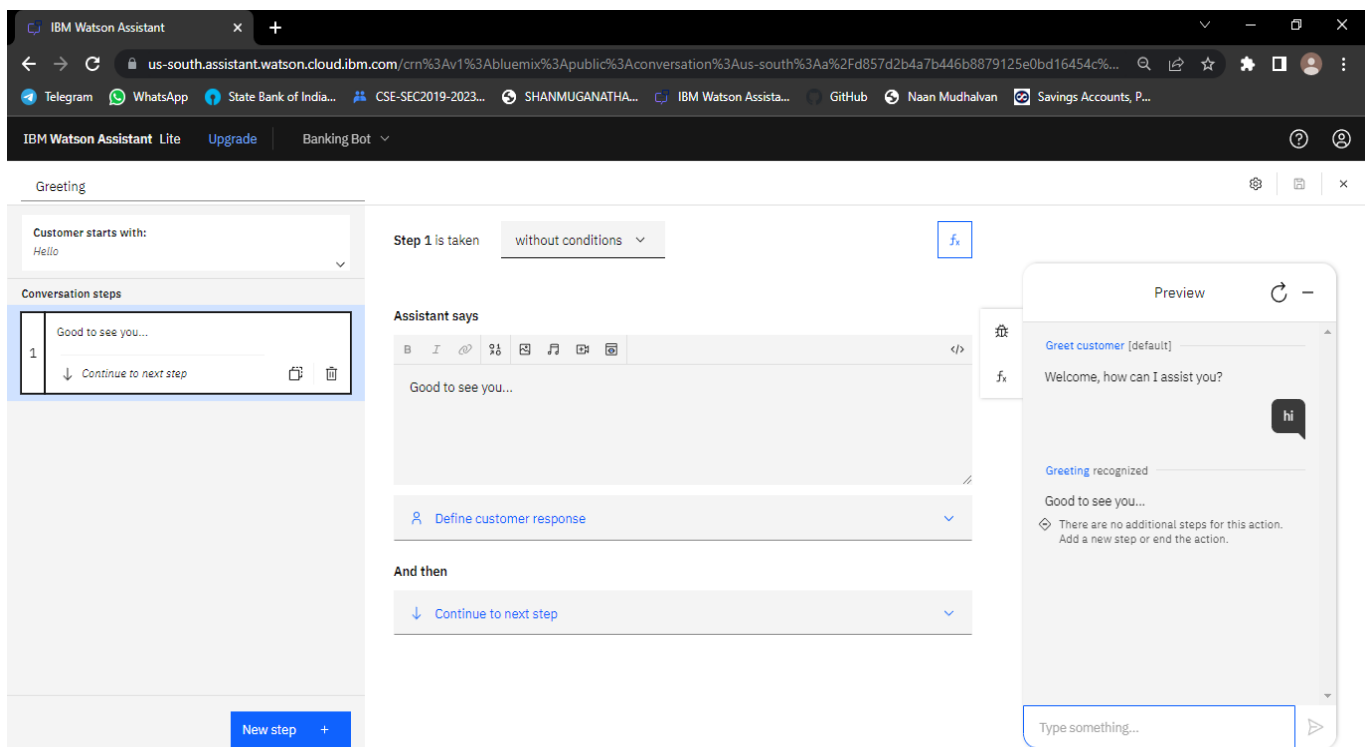
Hey

Hi

Greeting

Preview

2.3 Conversation Step 1 is created click the preview



IBM Watson Assistant Lite Upgrade Banking Bot

Greeting

Customer starts with:
Hello

Conversation steps

1 Good to see you...
Continue to next step

New step +

Step 1 is taken without conditions

Assistant says

Good to see you...

Define customer response

And then

Continue to next step

Preview

Greet customer [default]

Welcome, how can I assist you?

hi

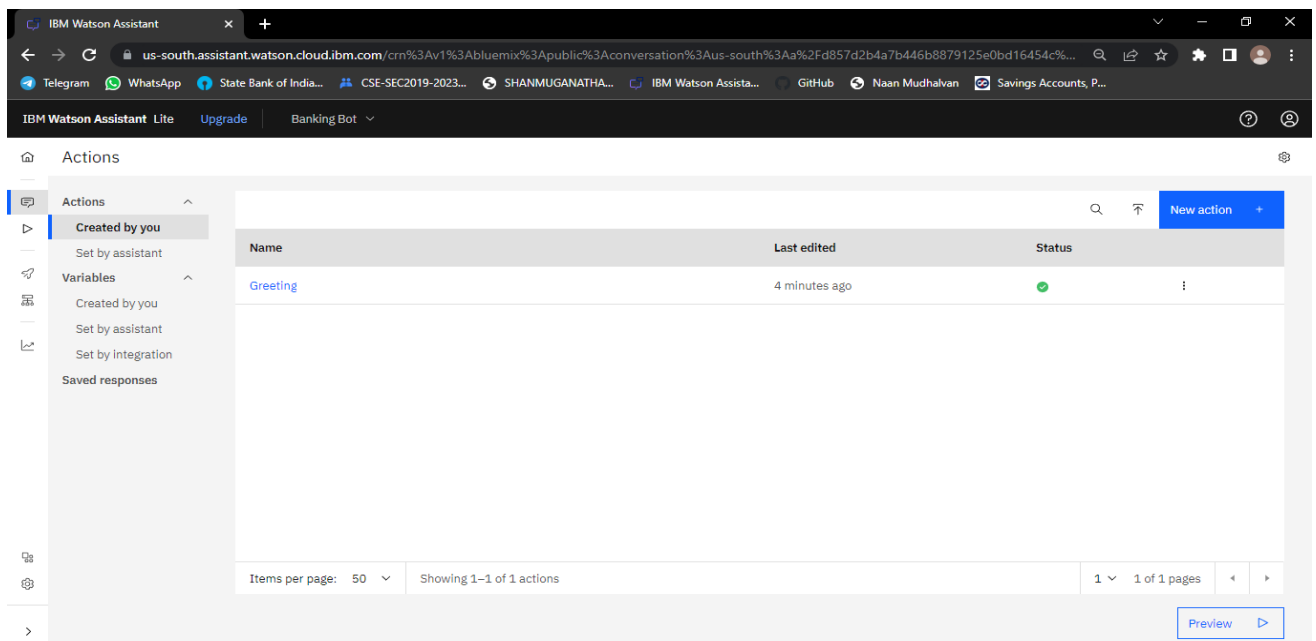
Greeting recognized

Good to see you...

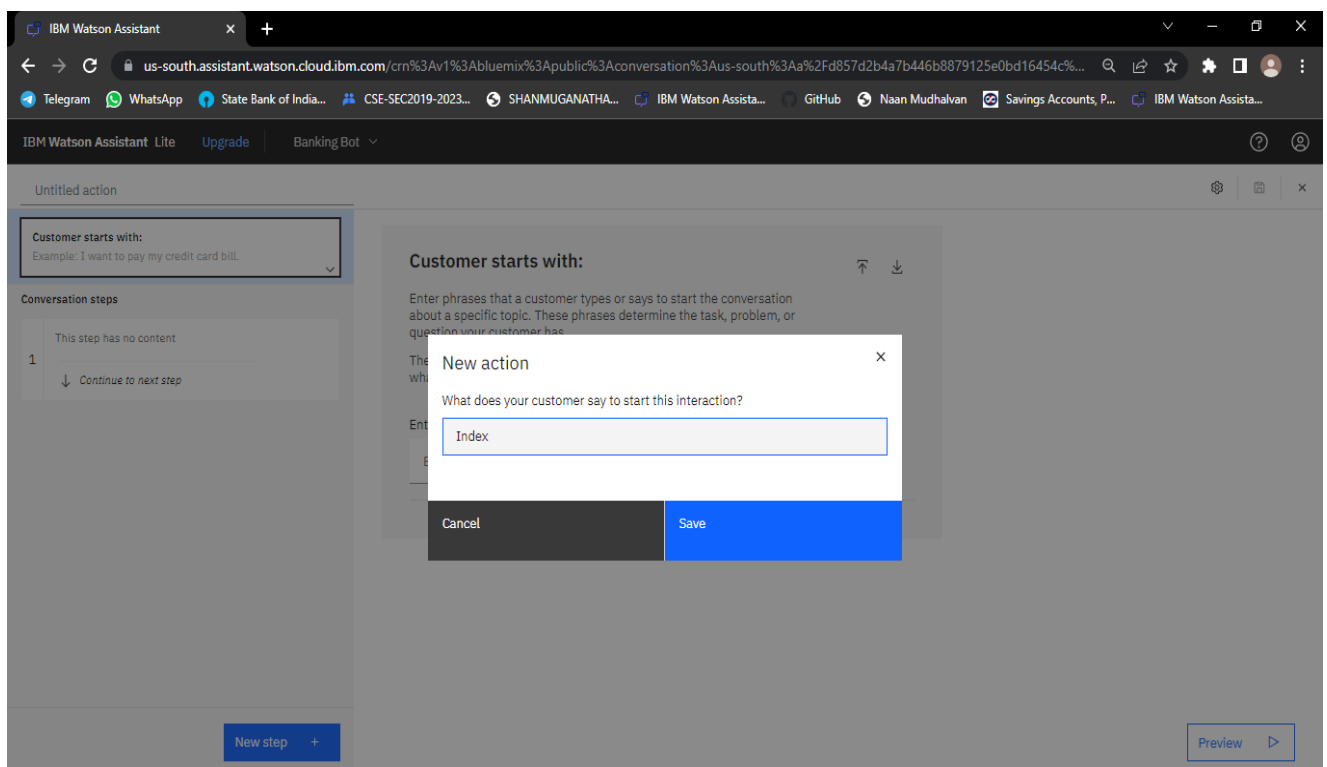
There are no additional steps for this action. Add a new step or end the action.

Type something...

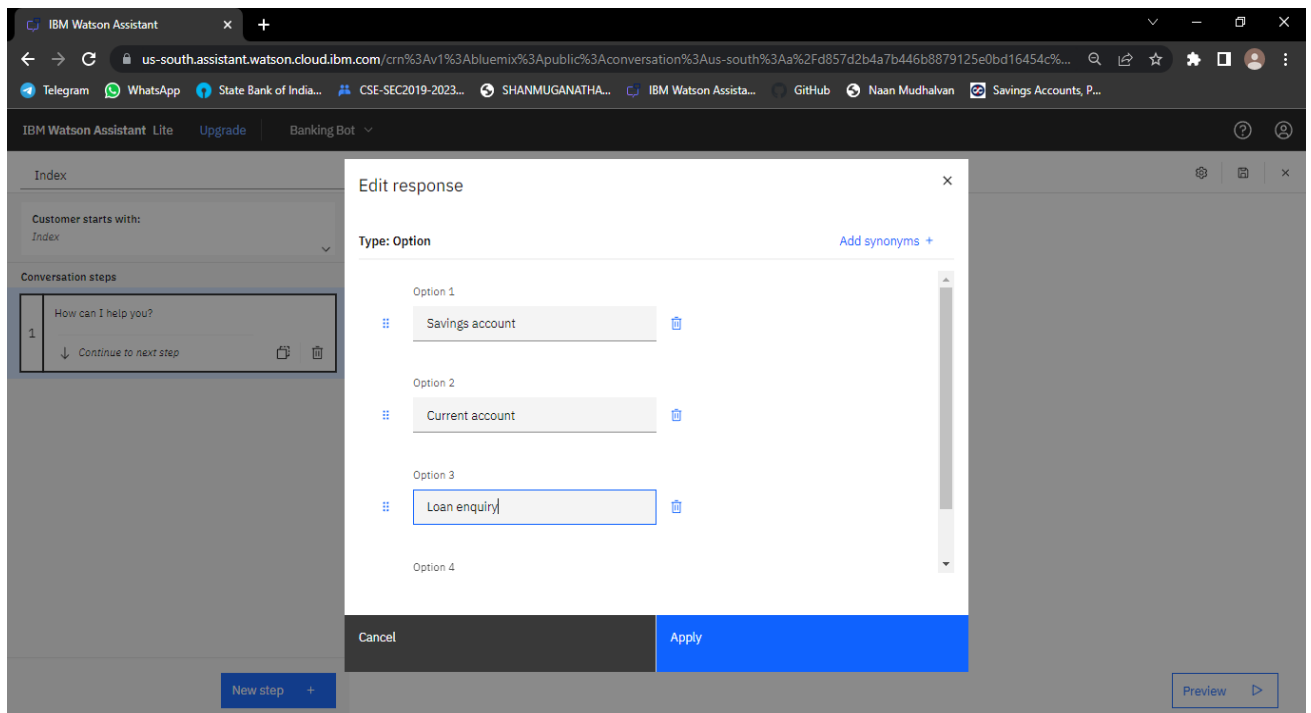
2.4 Greeting Action successfully created.



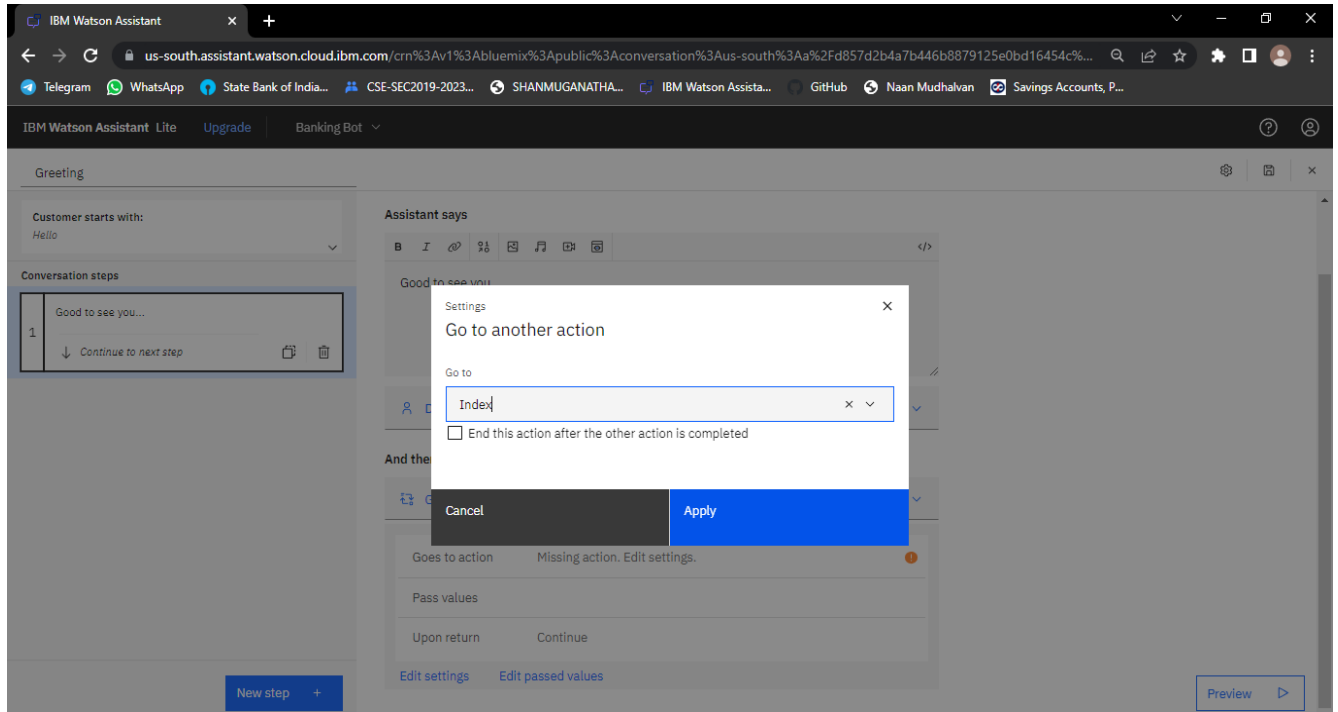
2.5 Create the new Action of Index & Click the Save



2.6 Choose the Define customer Response→ Click the options (Savings account, Current account, Loan enquiry, General query, Net Banking)



2.7 Index is linking with the greeting→ Choose Greeting Go to another action & Choose the Index click the Apply



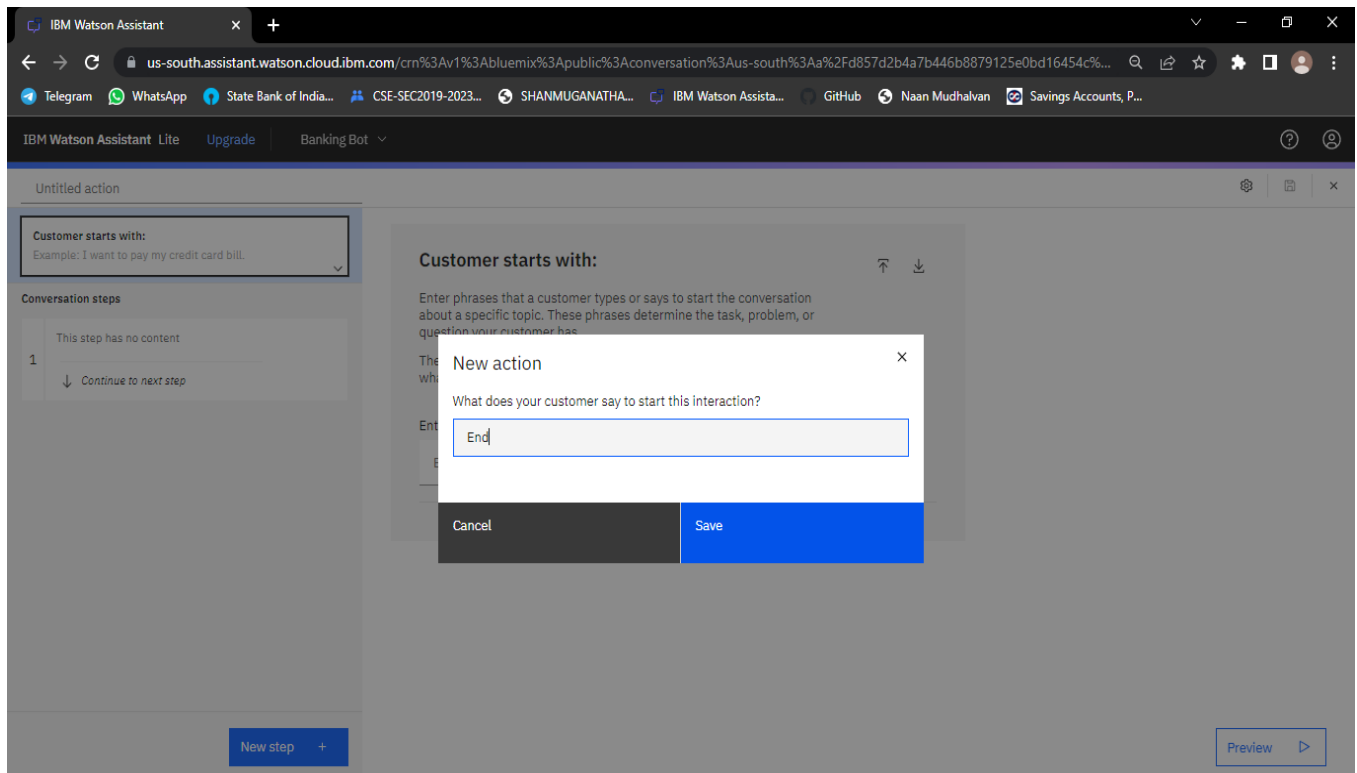
2.8 Now you can see the Preview page

The screenshot displays the IBM Watson Assistant interface. On the left, the 'Conversation steps' panel shows a single step with the text 'Good to see you...' and a 'Go to action: Index' button. The main workspace is divided into three sections: 'Assistant says' (containing the text 'Good to see you...'), 'Define customer response' (a dropdown menu), and 'And then' (containing a 'Go to another action' dropdown and a 'Goes to action: Index' field). On the right, the 'Preview' panel shows a chatbot conversation. The chatbot's response is 'Good to see you...' and the user's input is 'Hello'. Below the chatbot's response, there is a 'Select an option' dropdown menu with the following options: 'Savings account', 'Current account', 'Loan enquiry', 'General query', and 'Net Banking'.

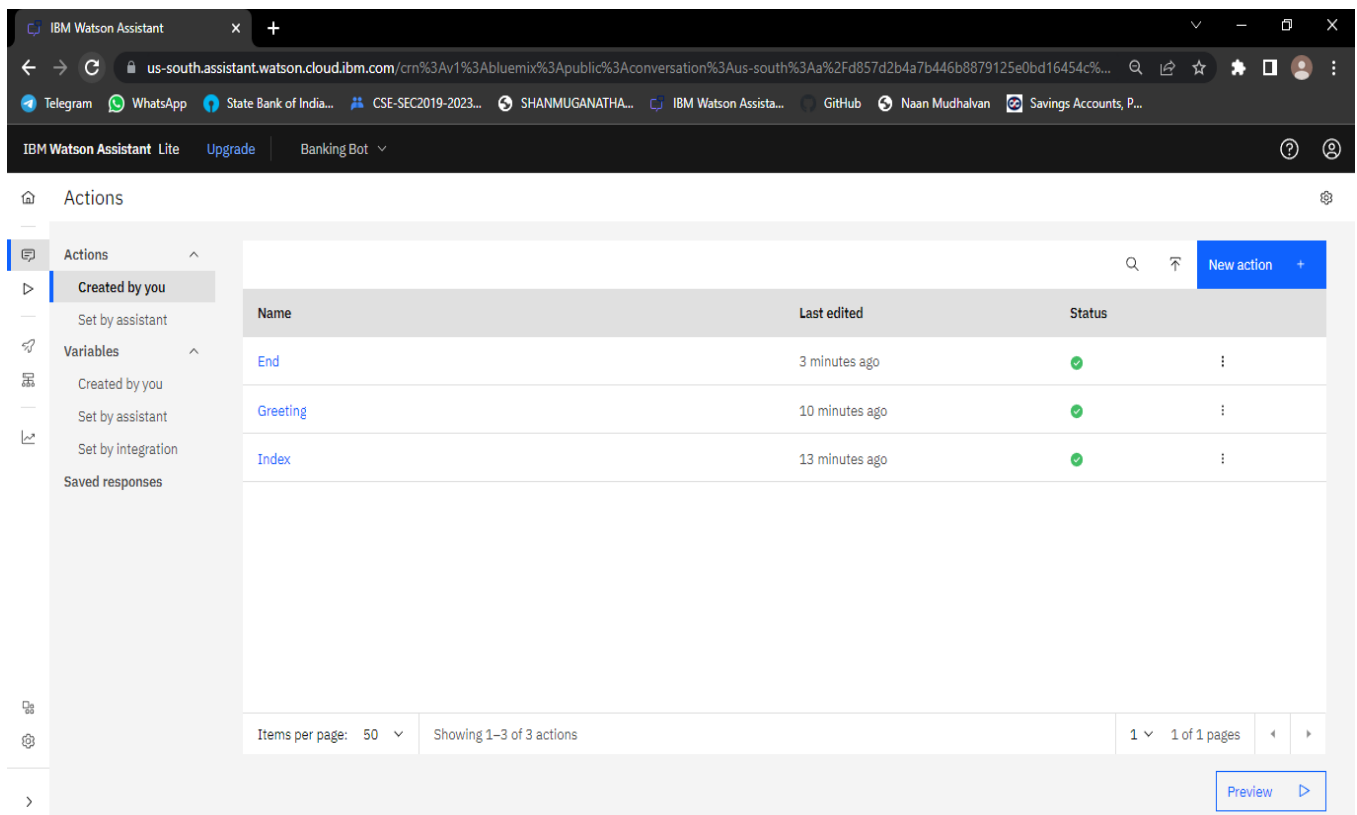
2.9 Preview Chatbot you choose the Select an option to below options are showing

This screenshot is identical to the one above, showing the IBM Watson Assistant interface. The 'Preview' panel on the right shows the chatbot's response 'Good to see you...' and the user's input 'Hello'. Below the chatbot's response, there is a 'Select an option' dropdown menu with the following options: 'Savings account', 'Current account', 'Loan enquiry', 'General query', and 'Net Banking'.

2.10 Next Create the New Action of End



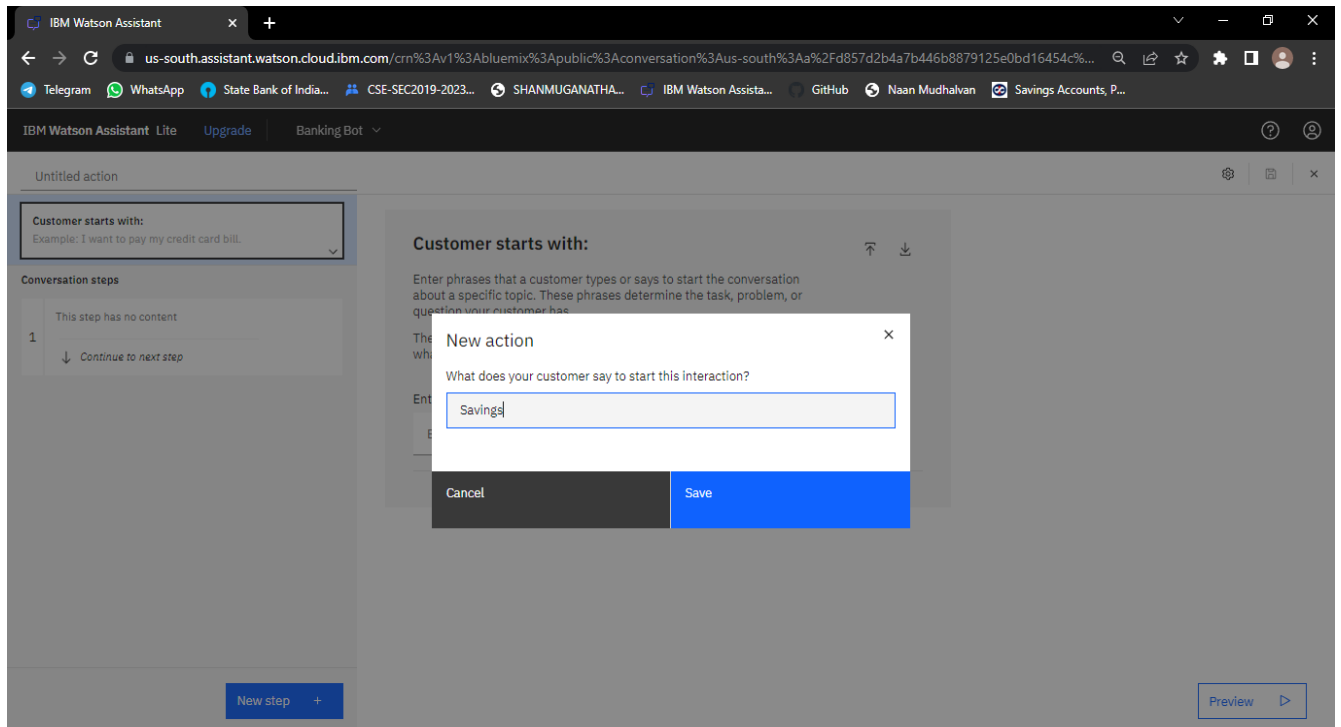
2.11 Now you can successfully create the chatbot skills



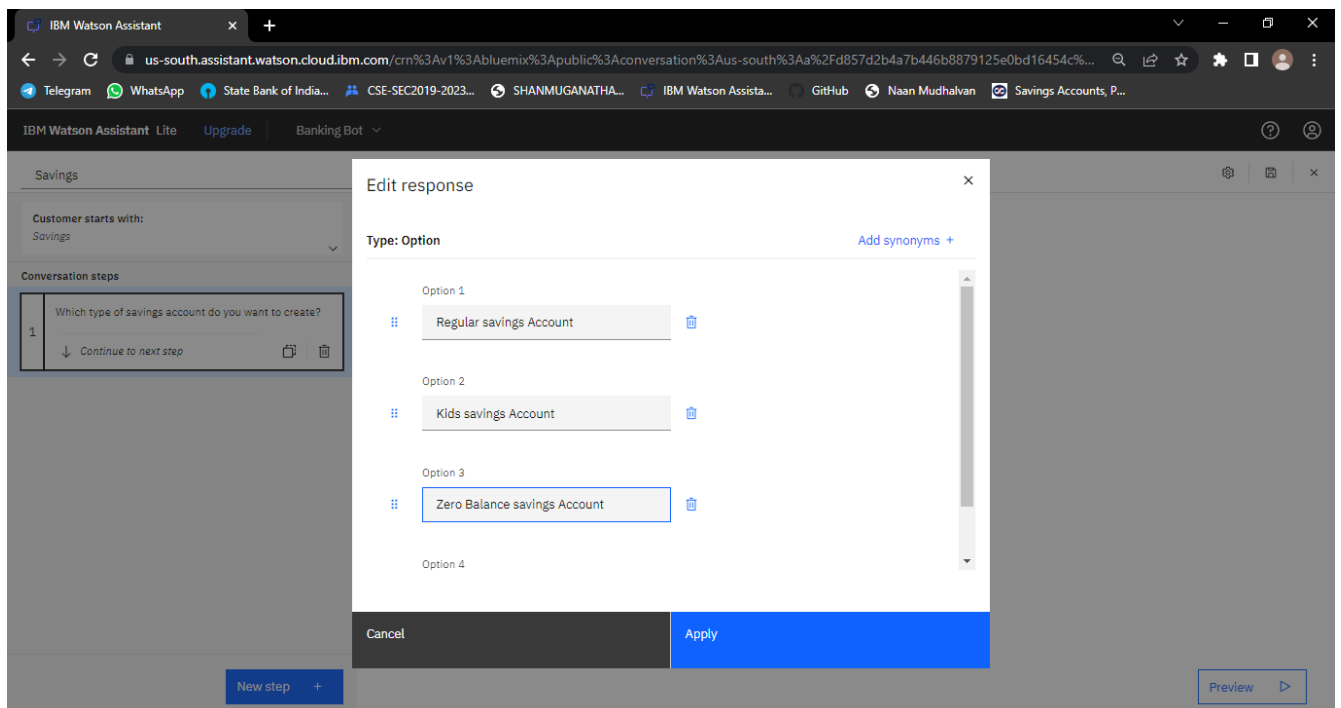
3.Creating Saving Account Action

- Regular Savings account
- Kids savings account
- Zero Balance Savings account

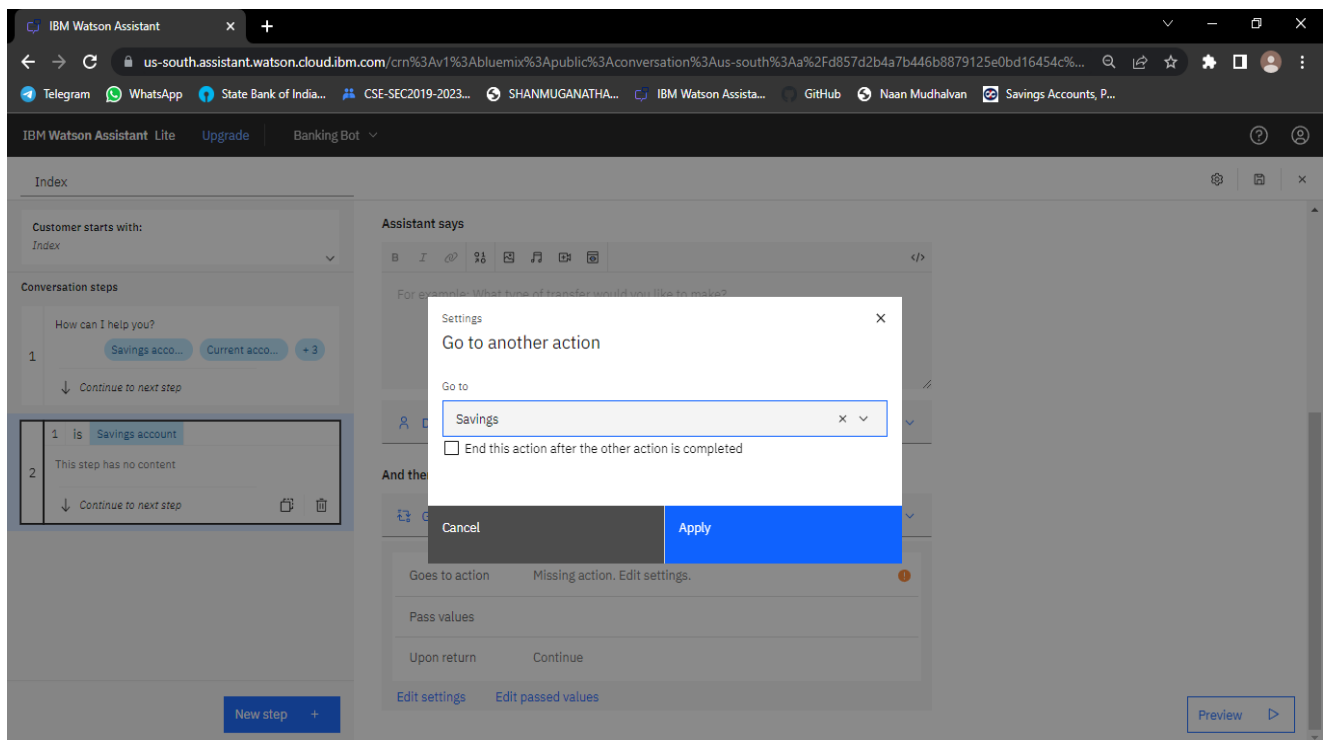
3.1 Create the New Action of Savings & Click the Apply.



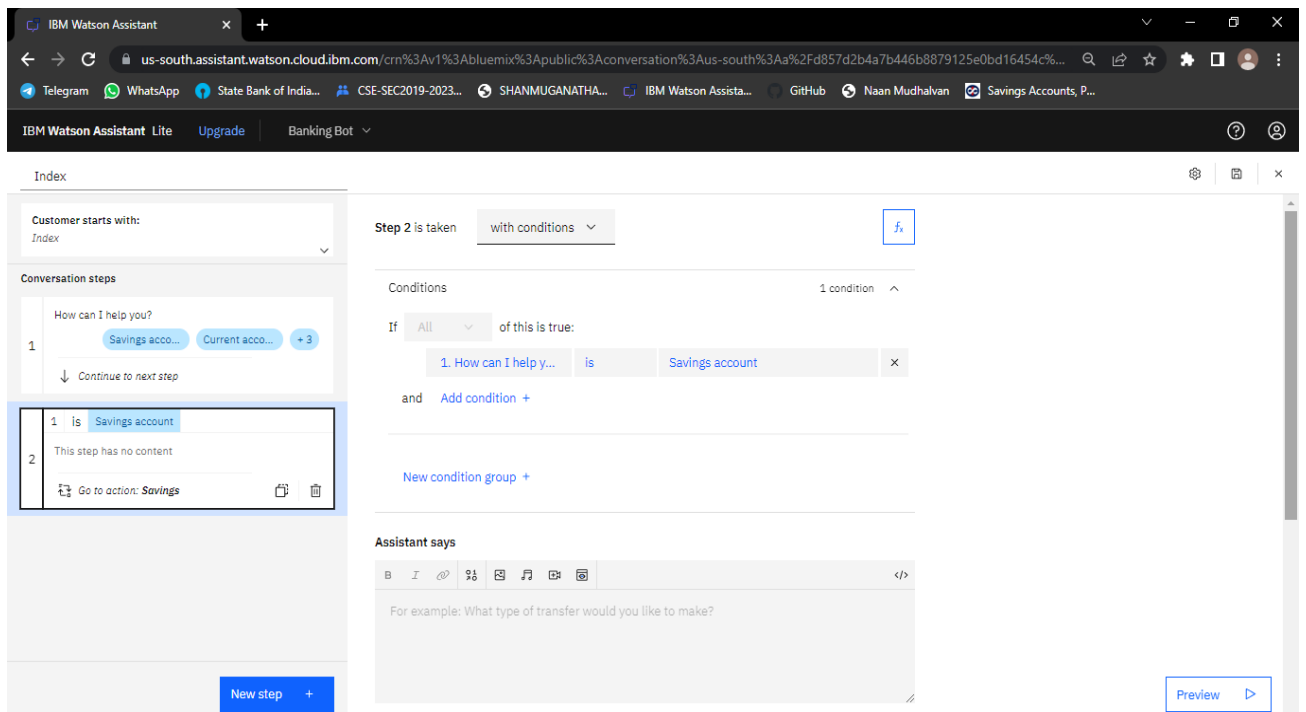
3.2 Savings conversation steps 1 in create the Defining Customer Responses & click the option to create the options(Regular, kids & Zero balance savings account).



3.3 Go to Index click the another action to link with the savings in index.



3.4 Next Create the Conversation step 2 for Regular savings account.



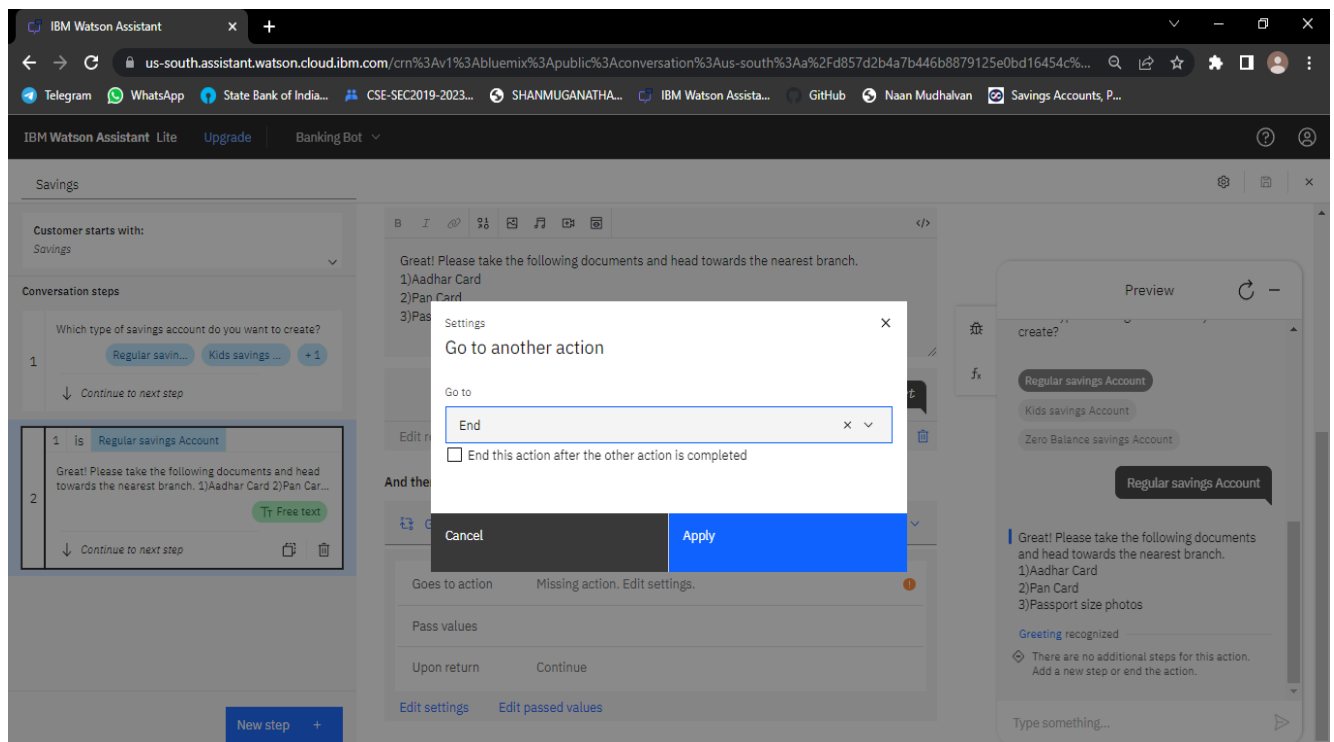
3.5 Choose preview the below show the Savings account option.

The screenshot displays the IBM Watson Assistant interface for configuring a conversation step. The browser address bar shows the URL: `us-south.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2Fd857d2b4a7b446b8879125e0bd16454c%...`. The interface includes a top navigation bar with links to Telegram, WhatsApp, State Bank of India, CSE-SEC2019-2023, SHANMUGANATHA, IBM Watson Assistant, GitHub, Naan Mudhalvan, and Savings Accounts, P... Below this is a sub-navigation bar with 'IBM Watson Assistant', 'Lite', 'Upgrade', and 'Banking Bot'. The main content area is divided into three panels: 1. **Index**: Shows 'Customer starts with: Index' and 'Conversation steps'. Step 1 is 'How can I help you?' with buttons for 'Savings acco...', 'Current acco...', and '+3'. Step 2 is 'This step has no content' with a 'Go to action: Savings' button. 2. **Conditions**: Shows 'Step 2 is taken with conditions'. A condition is defined: 'If All of this is true: 1. How can I help y... is Savings account'. 3. **Assistant says**: Shows a text input field with the placeholder 'For example: What type of transfer would you like to make?'. A 'Preview' window on the right shows a chat interface with a 'Savings account' button and a list of options: 'Regular savings Account', 'Kids savings Account', and 'Zero Balance savings Account'. The 'Regular savings Account' option is selected.

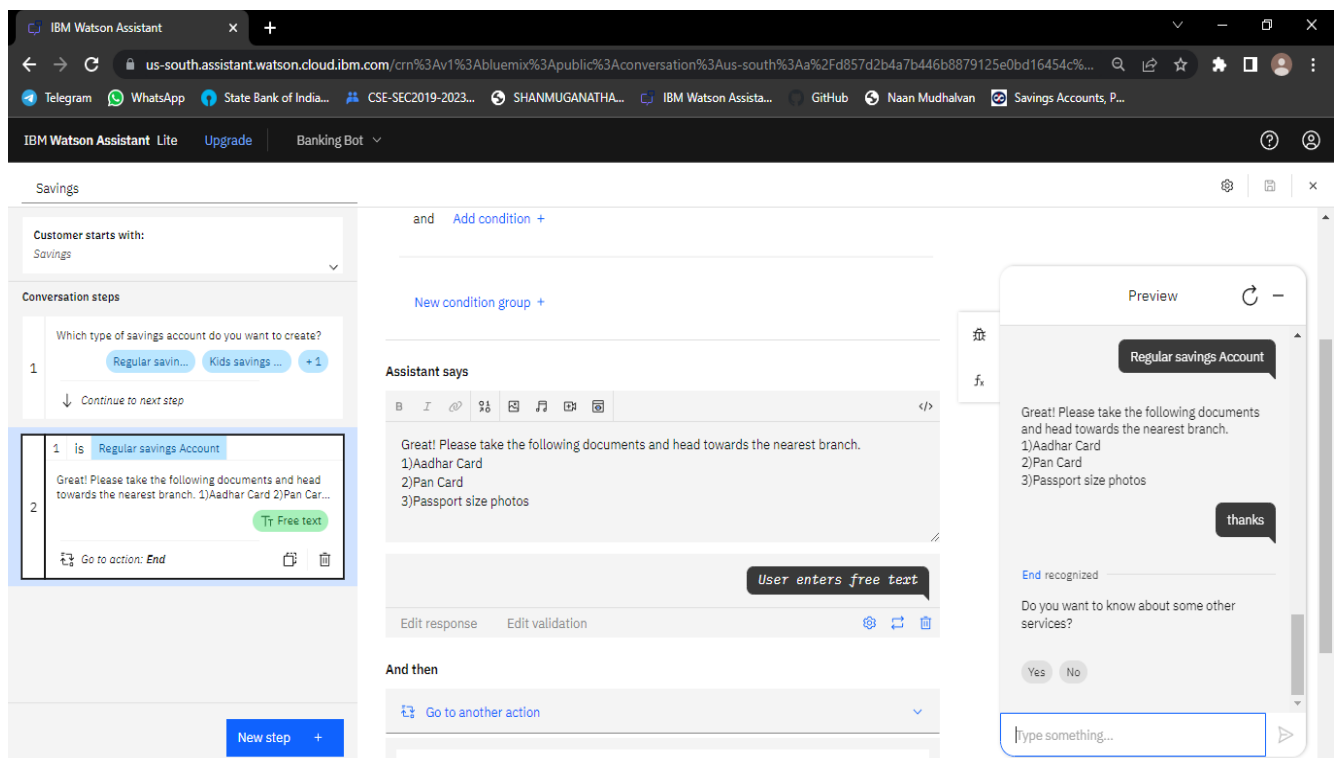
3.6 Next click the Regular Saving account to show some documents.

The screenshot displays the IBM Watson Assistant interface for configuring a conversation step. The browser address bar shows the URL: `us-south.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2Fd857d2b4a7b446b8879125e0bd16454c%...`. The interface includes a top navigation bar with links to Telegram, WhatsApp, State Bank of India, CSE-SEC2019-2023, SHANMUGANATHA, IBM Watson Assistant, GitHub, Naan Mudhalvan, and Savings Accounts, P... Below this is a sub-navigation bar with 'IBM Watson Assistant', 'Lite', 'Upgrade', and 'Banking Bot'. The main content area is divided into three panels: 1. **Index**: Shows 'Customer starts with: Savings' and 'Conversation steps'. Step 1 is 'Which type of savings account do you want to create?' with buttons for 'Regular savin...', 'Kids savings ...', and '+1'. Step 2 is 'Great! Please take the following documents and head towards the nearest branch. 1)Aadhar Card 2)Pan Car...' with a 'Continue to next step' button. 2. **Conditions**: Shows 'Step 2 is taken with conditions'. A condition is defined: 'If All of this is true: 1. Which type of sa... is Regular savings Account'. 3. **Assistant says**: Shows a text input field with the placeholder 'Great! Please take the following documents and head towards the nearest branch. 1)Aadhar Card 2)Pan Card 3)Passport size photos'. A 'Preview' window on the right shows a chat interface with a 'Regular savings Account' button and a list of options: 'Regular savings Account', 'Kids savings Account', and 'Zero Balance savings Account'. The 'Regular savings Account' option is selected. Below the chat interface, there is a text input field with the placeholder 'Use the up arrow for prior messages'.

3.7 Regular Savings account in choose the go to another action to End and Click the Apply.



3.8 Next you add the Free text for the Conversation step 1



3.9 Now Create the conversation Step 2 to the Kids savings account.

The screenshot shows the IBM Watson Assistant interface for creating a new step for the 'Kids savings Account'. The 'Conversation steps' panel on the left shows three steps: Step 1 (Regular savings Account), Step 2 (Kids savings Account), and Step 3 (Zero Balance savings Account). Step 2 is selected, and its details are shown in the main panel. The 'Assistant says' section contains the text: 'Awesome! Please take the following documents and head towards the nearest branch. 1)Aadhar card 2)Pan card 3)Passport size photos 4) Guardians Aadhar card'. The 'Preview' panel on the right shows a chat interface with a 'thanks' message and a 'Yes' button.

3.10 Now Create the Conversation step 2 to the Zero Balance account.

The screenshot shows the IBM Watson Assistant interface for creating a new step for the 'Zero Balance savings Account'. The 'Conversation steps' panel on the left shows three steps: Step 1 (Regular savings Account), Step 2 (Kids savings Account), and Step 3 (Zero Balance savings Account). Step 3 is selected, and its details are shown in the main panel. The 'Assistant says' section contains the text: 'Amazing! Please take the following documents and head towards the nearest branch. 1)Aadhar card 2)Pan card 3)Passport size photos'. The 'Preview' panel on the right shows a chat interface with a 'Zero Balance savings Account' message and a 'thanks' message.

3.11 Savings Account Actions are Successfully Created.

The screenshot displays the IBM Watson Assistant console interface. The main content area shows a table of actions created by the user. The table has two columns: 'Name' and 'Last edited'. The actions listed are 'End', 'Greeting', 'Savings', and 'Index'. The 'Savings' action was last edited 4 minutes ago. A preview window is open on the right, showing a conversation flow for the 'Savings' action. The preview shows a user input 'thanks', followed by the assistant response 'Do you want to know about some other services?'. The user then inputs 'No', and the assistant responds 'Thank you. Have a nice day.'.

Name	Last edited
End	13 minutes ago
Greeting	an hour ago
Savings	4 minutes ago
Index	27 minutes ago

Items per page: 50 Showing 1–4 of 4 actions

Preview window content:

thanks

End recognized

Do you want to know about some other services?

Yes No

No

Thank you. Have a nice day.

Greeting recognized

There are no additional steps for this action. Add a new step or end the action.

Type something...