

Project Development Phase

Sprint 1

Date	29 October 2022
Team ID	PNT2022TMID30537
Project Name	AI Based Discourse for Banking Industry

Screenshots of Sprint 1 Tasks:

Create IBM Watson Assistant Services:

us-south.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Auz-south%3Aa%2Fe8b557963b4148b0b0b35cd6978646%3A58c3a2cb-73e7-4e3a-9b60...

IBM Watson Assistant Life Upgrade Learning center

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

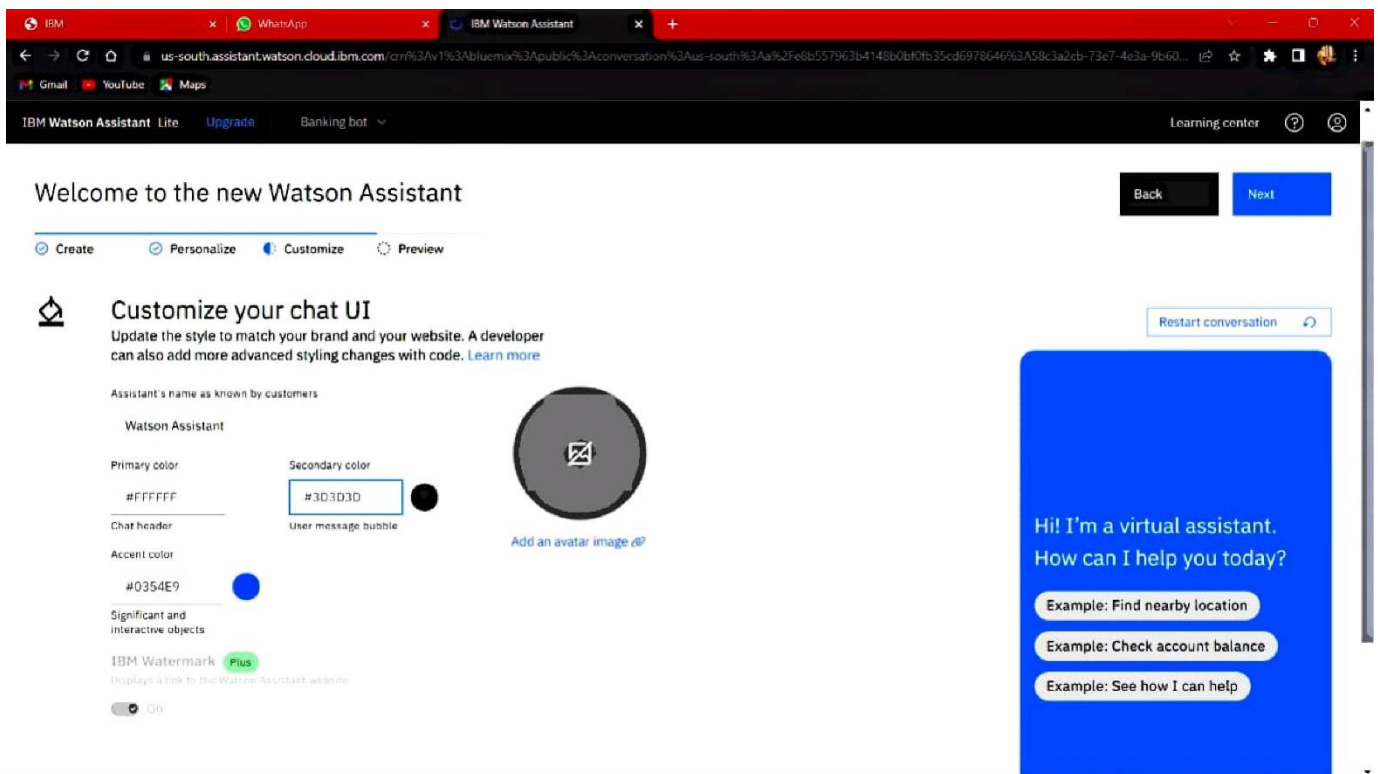
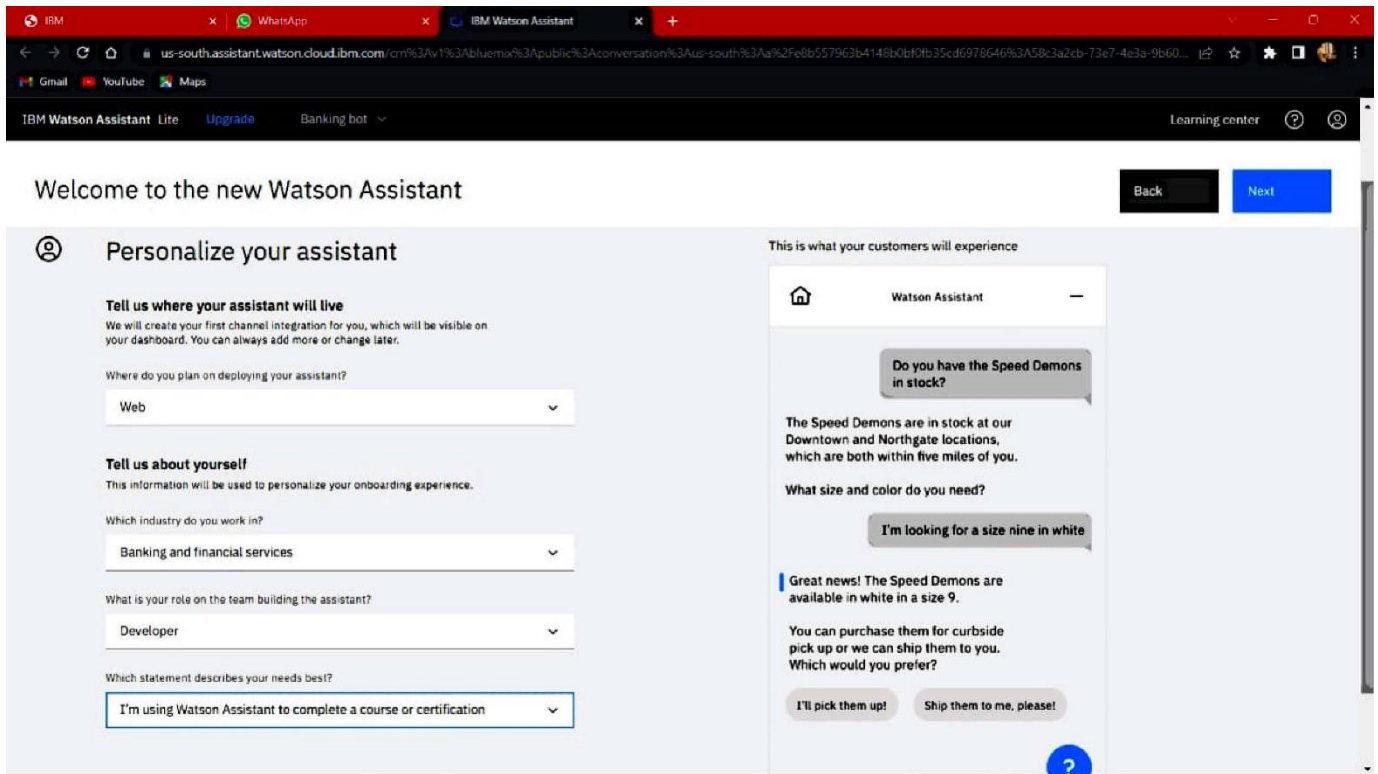
Description (optional) 0/128

Add a description for this assistant

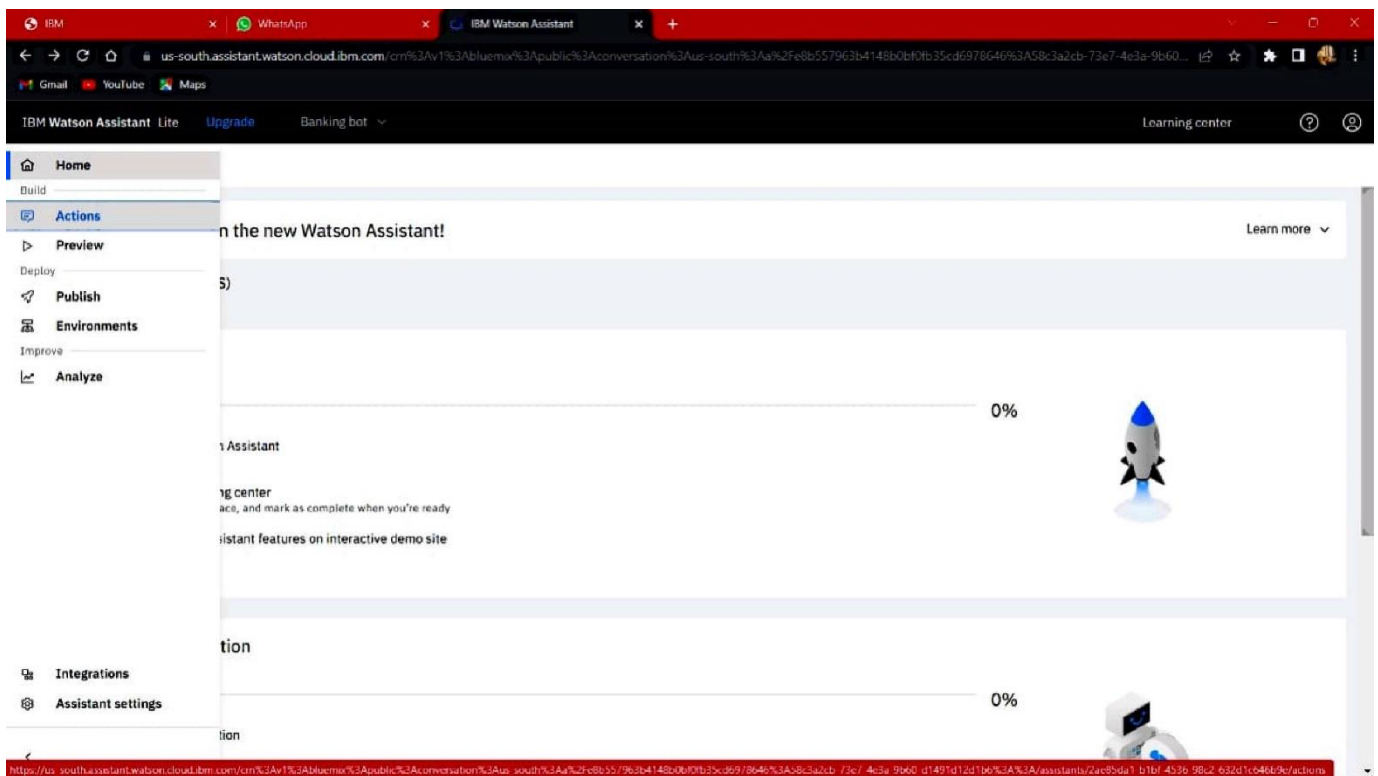
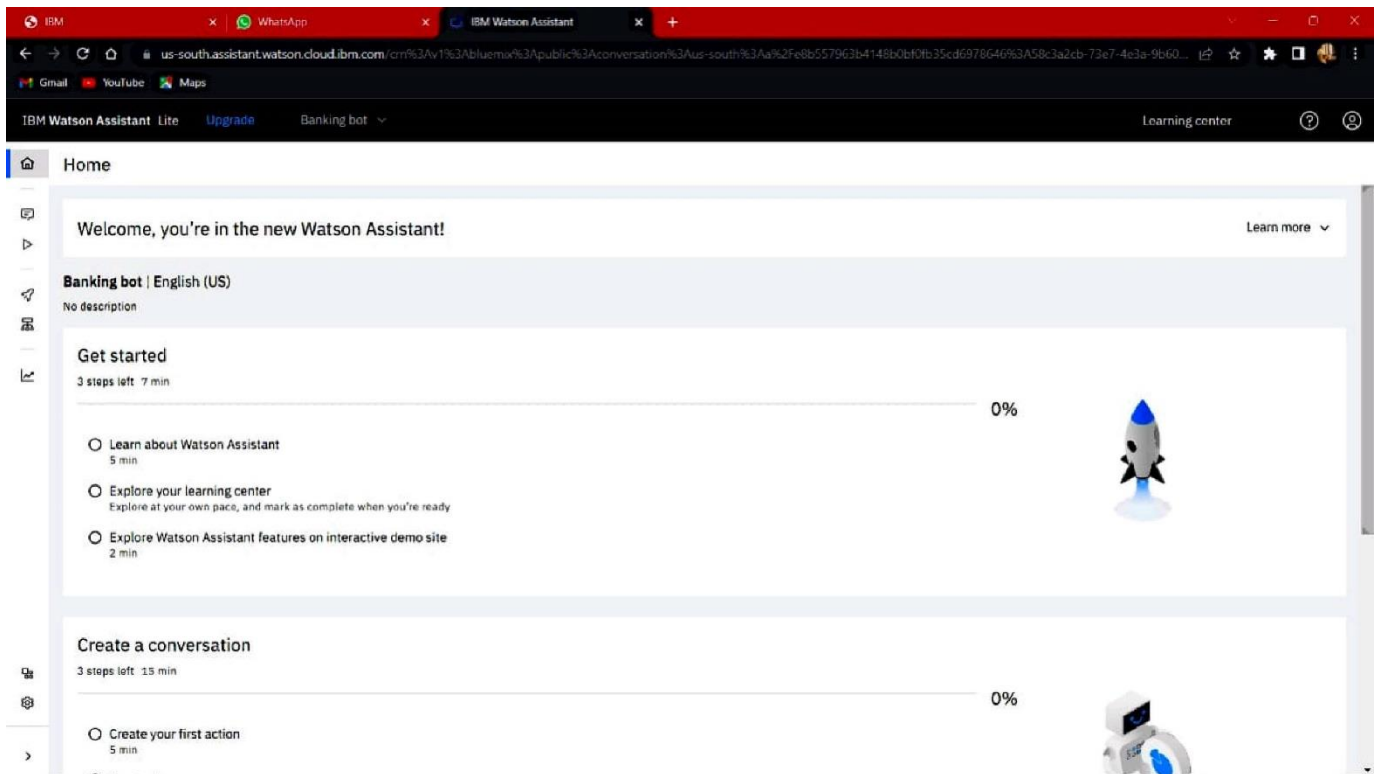
Assistant language

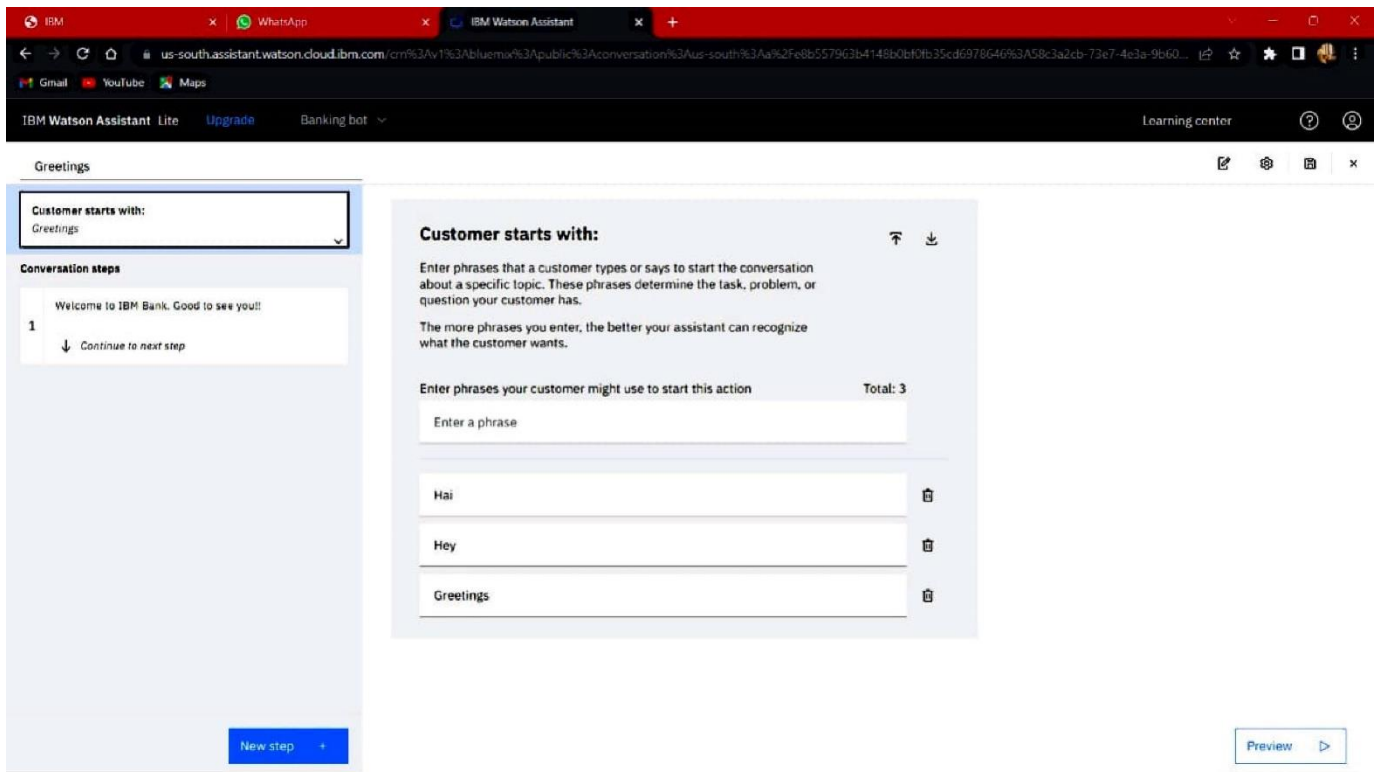
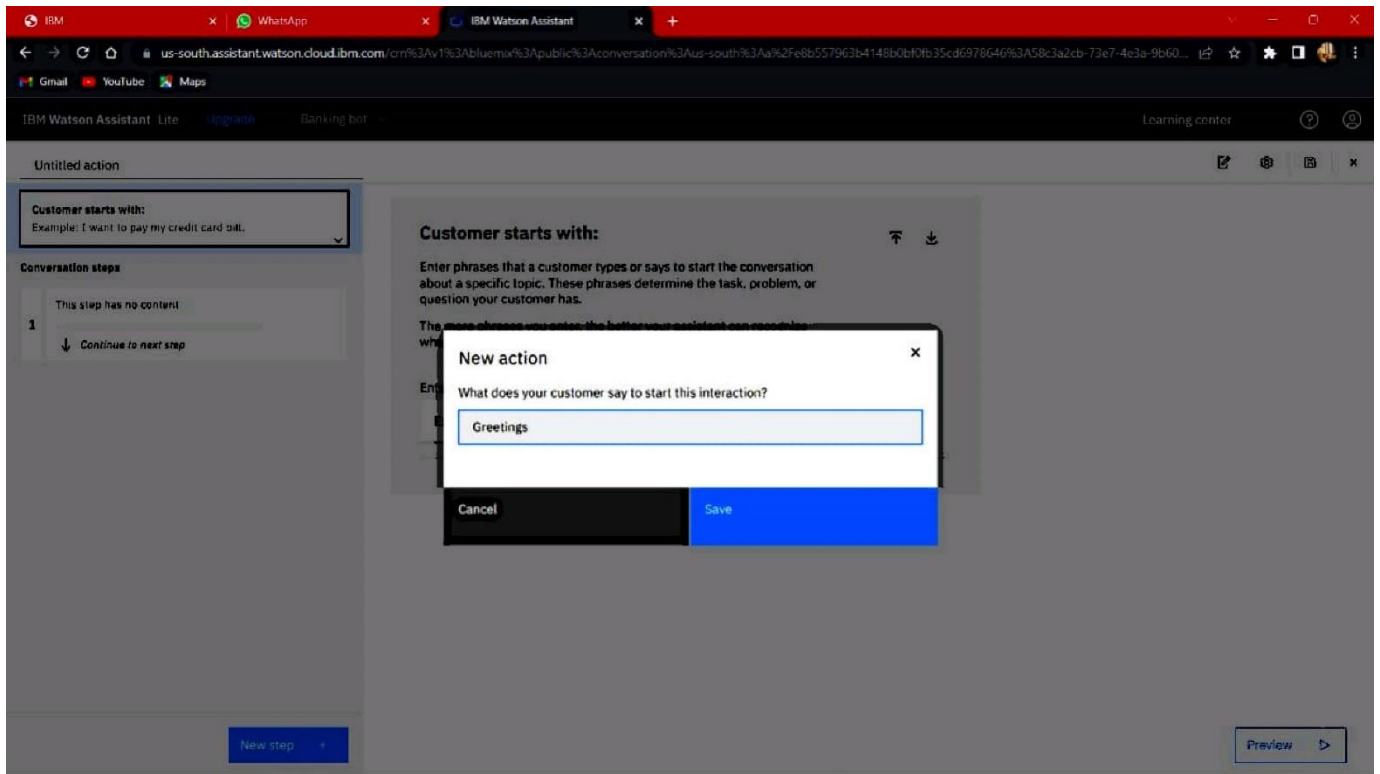
English (US)

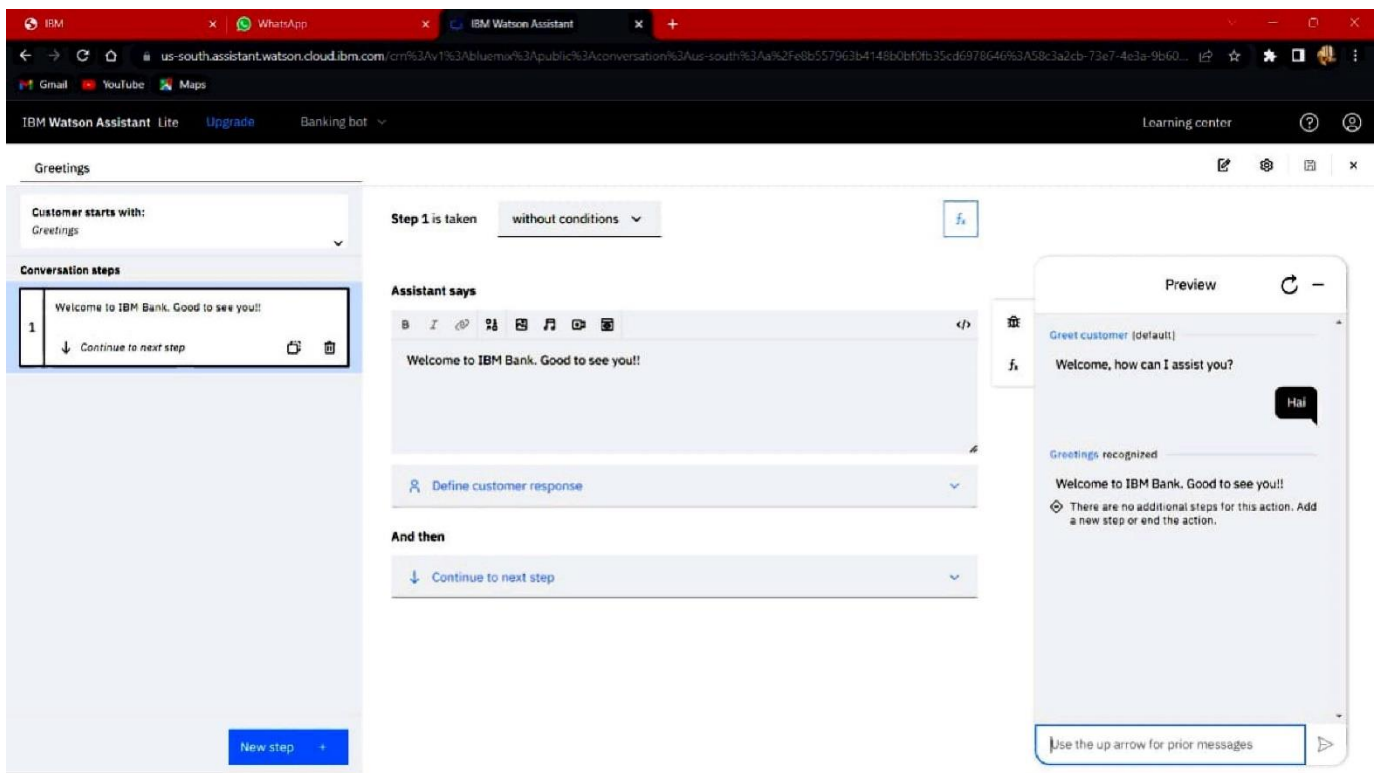
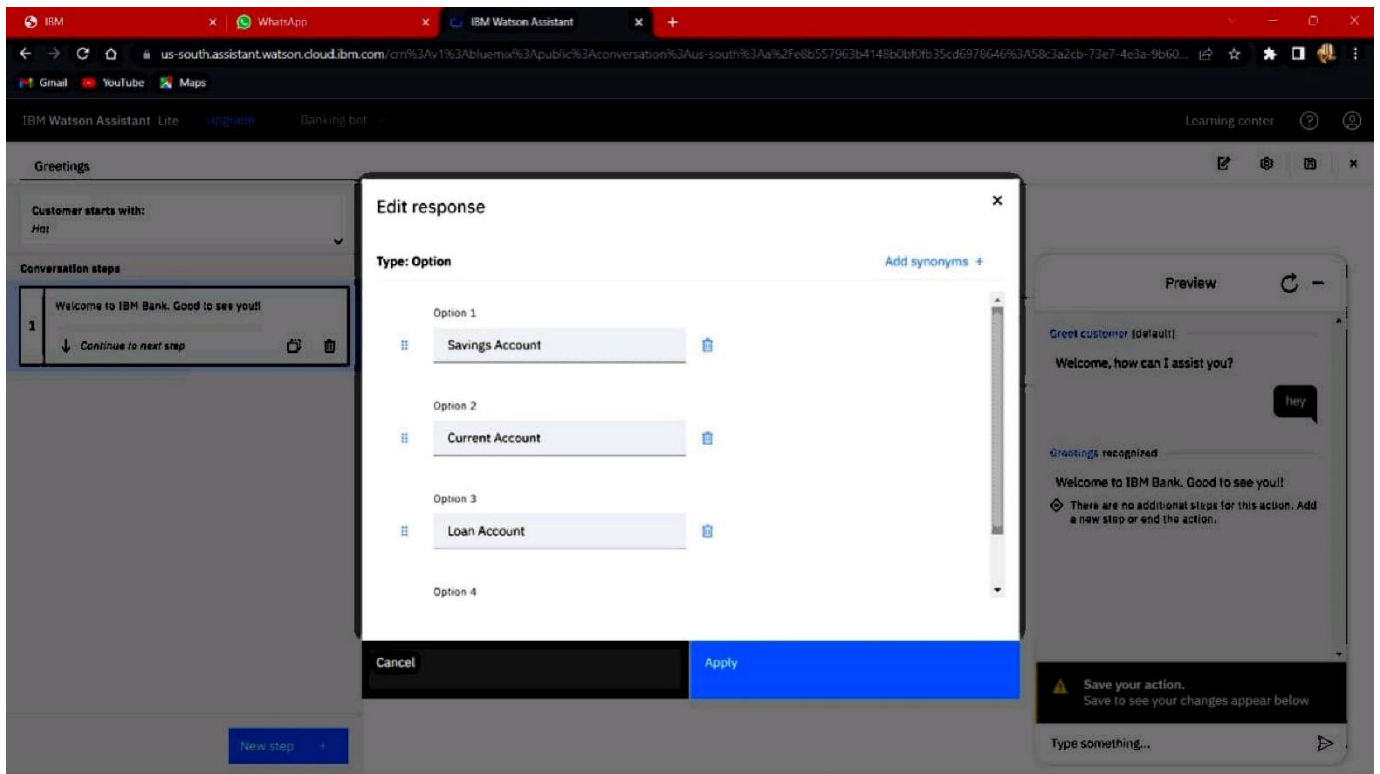
This is the language your assistant will speak.

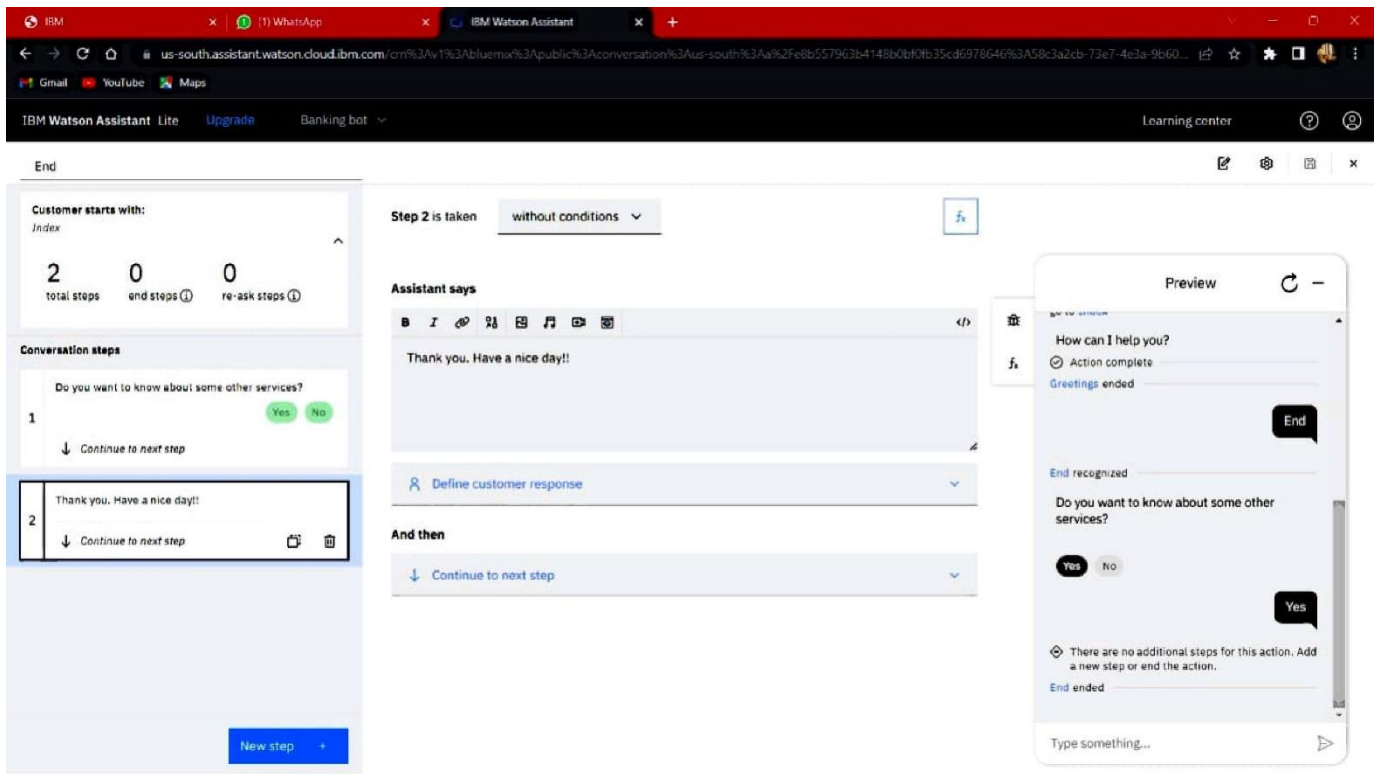


Chatbot Skills Creation:

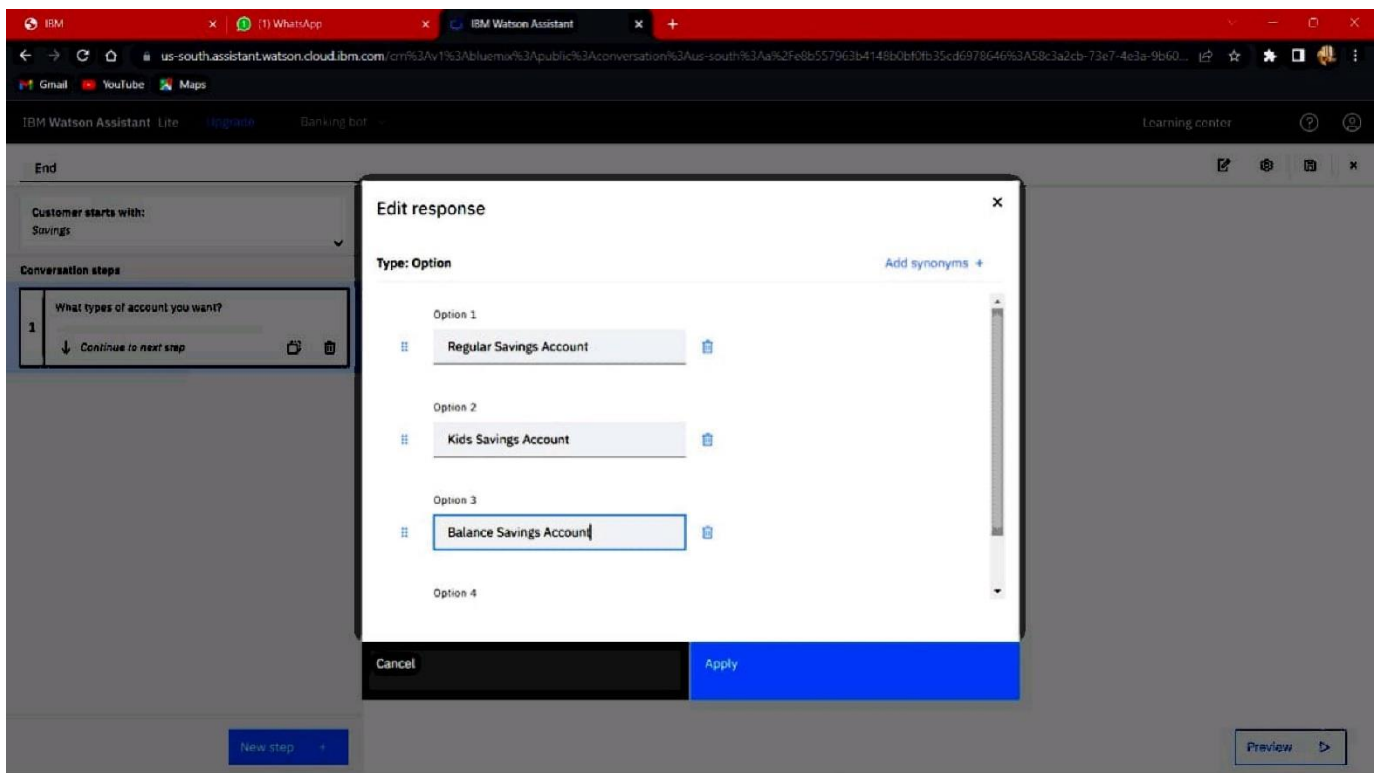


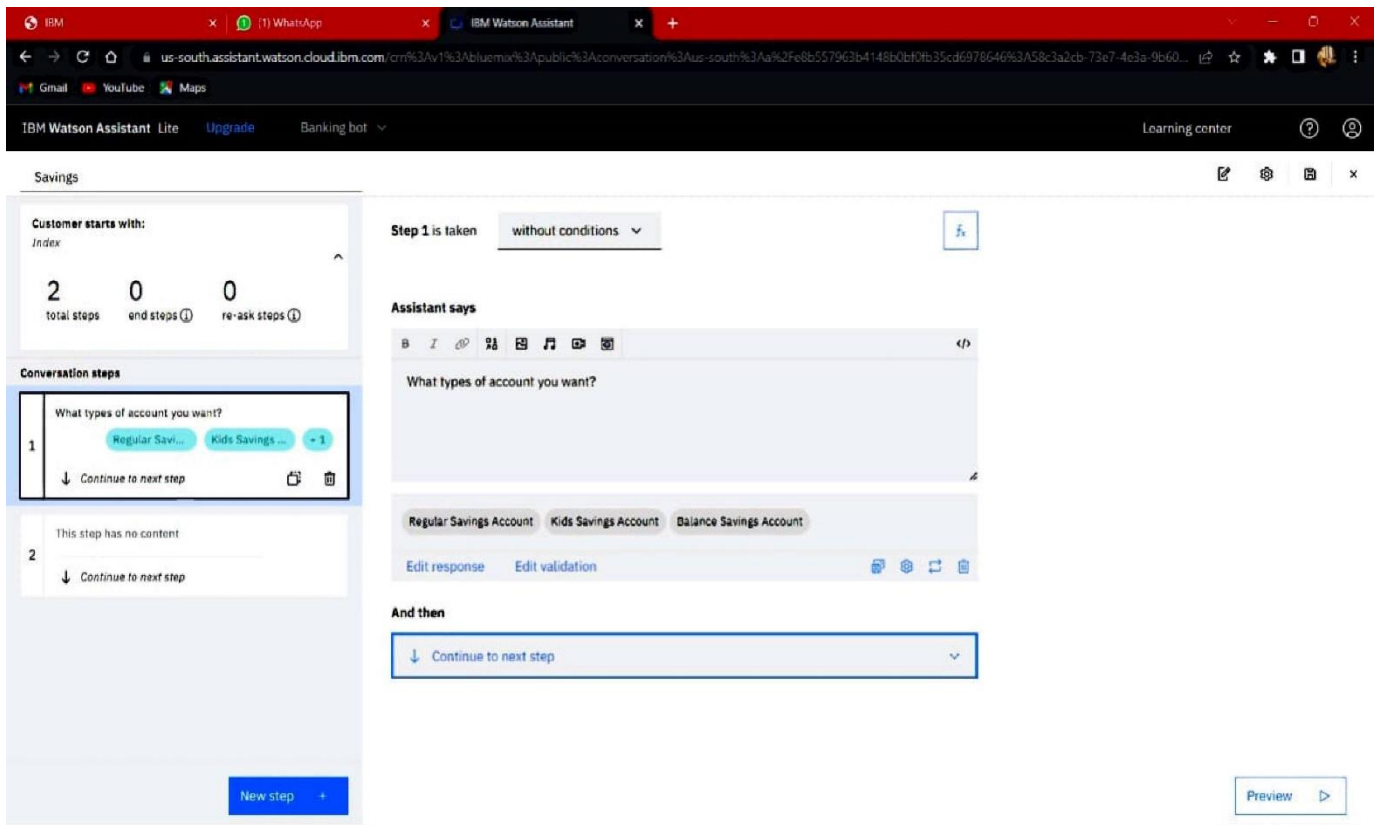
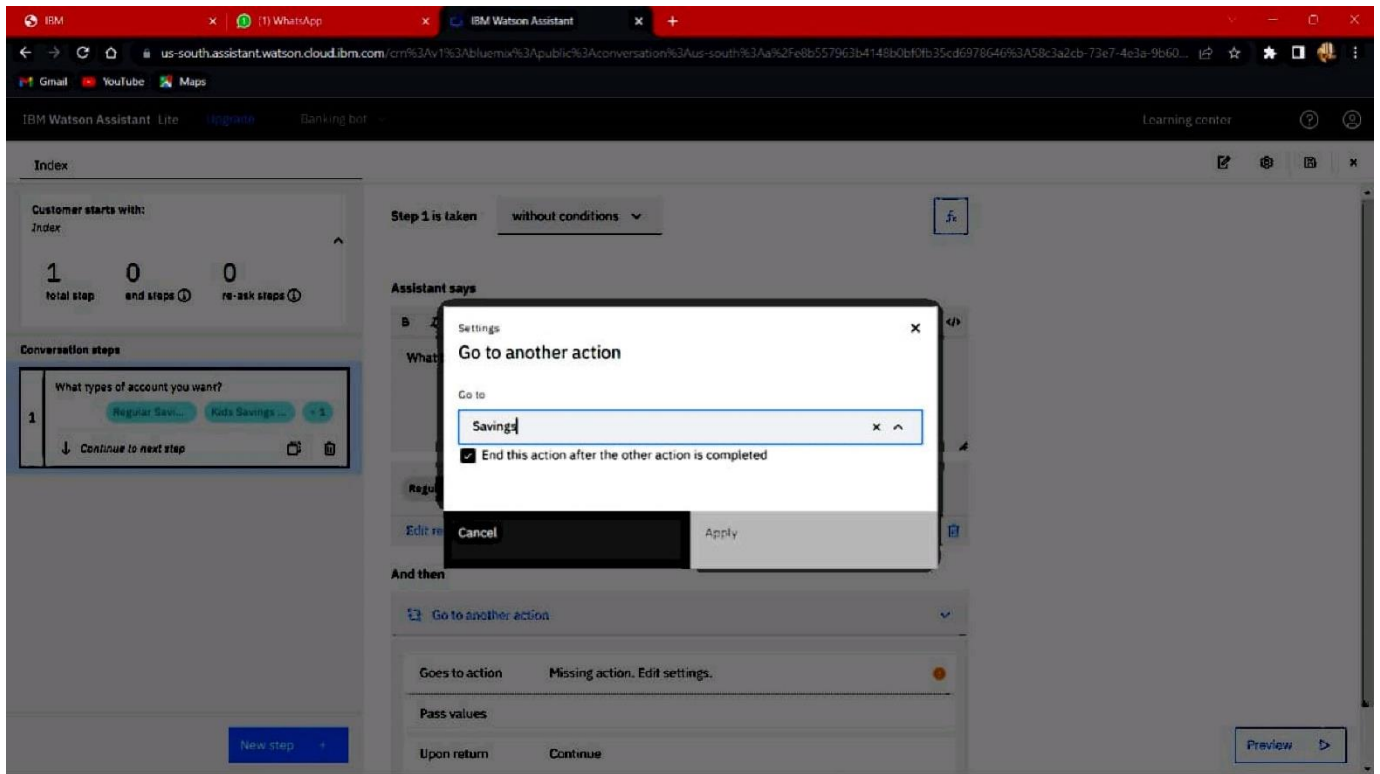






Creating Savings Account Action:





IBM Watson Assistant interface showing a conversation flow for "Savings".

Customer starts with: Savings

Conversation steps:

- What types of account you want?
Regular Savi... Kids Savings ... - 1
Continue to next step
- Please take the following documents and head toward nearest branch
User enter fr...
Go to action: End

Assistant says:

Please take the following documents and head toward nearest branch

- ID Proof(Aadhaar Card/ PAN Card / Passport)
- Address Proof(Voter ID/Aadhaar Card/ Ration Card)
- Passport size photos

And then:

Go to another action

Goes to action: End

Pass values

Upon return: Continue

Preview:

Greet customer [default]
Welcome, how can I assist you?
savings account
Savings recognized
What types of account you want?
Regular Savings Account
Kids Savings Account
Balance Savings Account
Balance Savings Account
Please take the following documents and head toward nearest branch
Type something...

IBM Watson Assistant interface showing a conversation flow for "Savings".

Customer starts with: Savings

Conversation steps:

- What types of account you want?
Regular Savi... Kids Savings ... - 1
Continue to next step
- Please take the following documents and head toward nearest branch
User enter fr...
Go to action: End
- This step has no content
Continue to next step

Assistant says:

Please take the following documents and head toward nearest branch

- ID Proof(Aadhaar Card/ PAN Card / Passport)
- Address Proof(Voter ID/Aadhaar Card/ Ration Card)
- Passport size photos

And then:

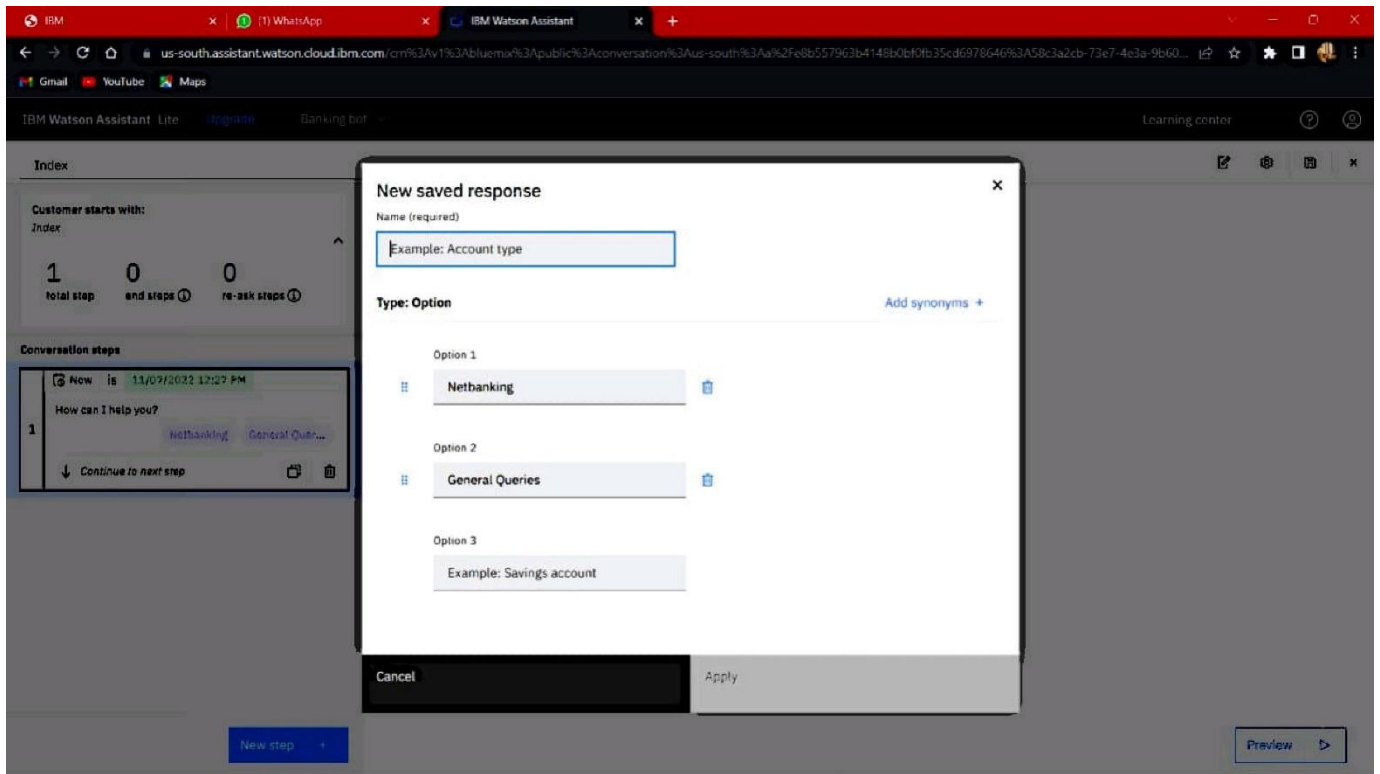
Go to another action

Goes to action: End

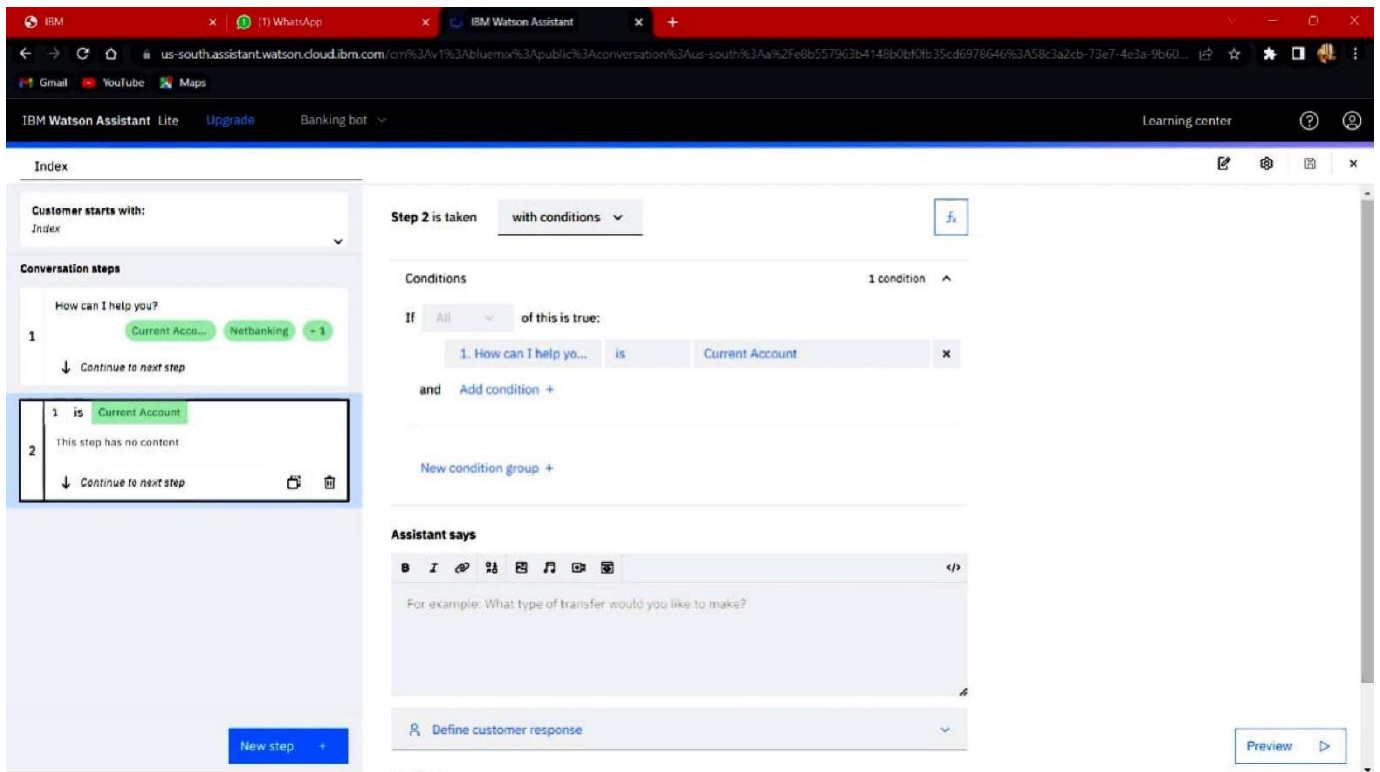
Pass values

Preview:

Card/ Ration Card)
Passport size photos
User enter free text
User enter free text
go to End
Do you want to know about some other services?
Yes No
No
Save your action.
Save to see your changes appear below
Type something...



Creating Current Account Action:



IBM Watson Assistant Lite Upgrade Banking bot Learning center

Index

Customer starts with: Index

Conversation steps

Now is 11/07/2022 12:32 PM

How can I help you?

1 is Netbanking Current Acco... + 1

Continue to next step

1 is Netbanking

2 This step has no content

Go to action: Savings

1 is Current Account

3 This step has no content

Continue to next step

New step +

Step 3 is taken with conditions

Conditions 1 condition

If All of this is true:

1. How can I help yo... is Current Account

and Add condition +

New condition group +

Assistant says

For example: What type of transfer would you like to make?

Define customer response

Preview

New Tab IBM Watson Assistant I endyr D IBM Watson Assistant IBM

us-southassistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2Fe8b557963b4148b0bf0b35cd6976646%3A58c3a2cb-73e7-4e3e-9b60...

IBM Watson Assistant Lite Upgrade Banking bot Learning center

Current

Customer starts with: Current

Conversation steps

What is your's company type?

1 is proprietorship Partnership

Continue to next step

1 is proprietorship

2 Please take the following documents and approach the closest branch:
 1.Income tax returns of...

Go to action: End

1 is proprietorship

3 Please take the following documents and approach the closest branch:
 1.Income tax returns of...

Go to action: End

New step +

Assistant says

Settings

Go to another action

Go to

End

☒ End this action after the other action is completed

Cancel Apply

Goes to action End

Pass values

Upon return Continue

Edit settings Edit passed values

Preview

Greet customer (default)

Welcome, how can I assist you?

Save your action. Save to see your changes appear below

Type something...