

CREATING AN IBM SERVICE

Date	26 October2022
Team ID	PNT2022TMID20787
Project Name	AI-based discourse for Banking Industry

Creation of IBM Service

Steps for creating IBM service

Create Watson Assistant

Create a new assistant

Steps for creating a Watson assistant:

Step 1:

Login to your cloud account → Go to the catalog section → Select Watson Assistant

Step 2:

Mention the location of your cloud service, Click on the 'Agree to the license agreement' check box and the click on the create button

Step 3:

Launch the Watson assistant

Step 4:

Name your Watson assistant and proceed further

Step 5:

Now you should personalize your assistant. Select the choices according to your project needs and the requirements which your Watson assistant should satisfy.

Step 6:

Customize your Watson assistant by making it colourful.

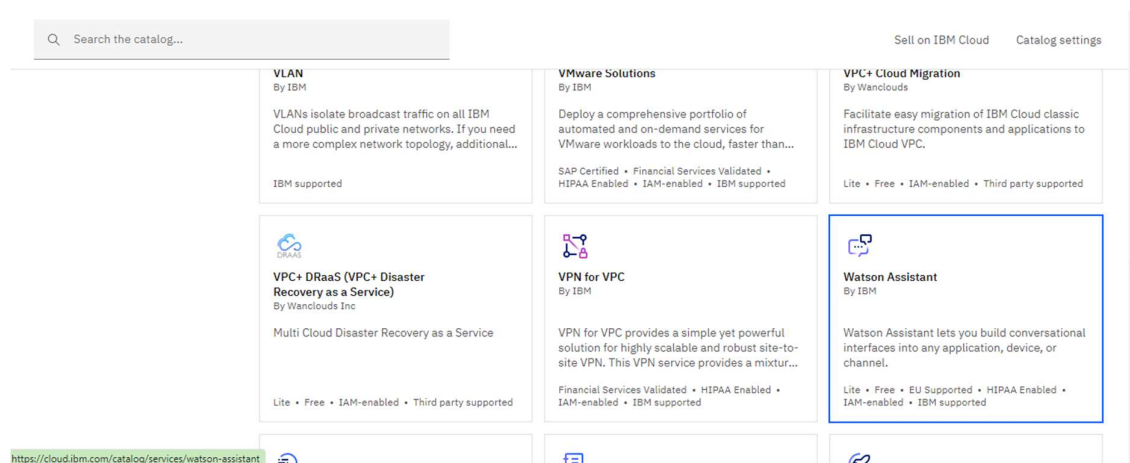
Step 7:

Now you can preview your assistant and the welcome page of the assistant will be visible to you.

Steps with screenshots:

Step 1:

Login to your cloud account → Go to the catalog section → Select Watson Assistant



Step 2:

Mention the location of your cloud service, Click on the 'Agree to the license agreement' check box and the click on the create button

Catalog /

Watson Assistant

Watson Assistant lets you build conversational interfaces into any application, device, or channel.

Summary

Watson Assistant Free

Location: Dallas

Plan: Lite

Service name: Watson Assistant-tm

Resource group: Default

☒ I have read and agree to the following license agreements: [Terms](#)

Create

Add to estimate

Type

Service

Provider

IBM

Last updated

11/02/2022

Category

AI / Machine Learning

Compliance

EU Supported
HIPAA Enabled
IAM-enabled

Location

Sydney
Frankfurt

Create About

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	<p>Everything you need to get started, free for as long as you need it</p> <p>Up to 1,000 unique monthly active users (MAUs) chatting with your assistant</p> <p>Up to 10,000 messages per month</p> <p>--- Features ---</p>	Free

Step 3:

Launch the Watson assistant

Resource list /

Watson Assistant-tm 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/>

Step 4:

Name your Watson assistant and proceed further

IBM Watson Assistant Lite 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)

Step 5:

Now you should personalize your assistant. Select the choices according to your project needs and the requirements which your Watson assistant should satisfy.

IBM Watson Assistant Lite Upgrade Banking Bot

Learning center

Welcome to the new Watson Assistant

Back Next

Personalize your assistant

Tell us where your assistant will live

We will create your first channel integration for you, which will be visible on your dashboard. You can always add more or change later.

Where do you plan on deploying your assistant?

Choose an option

Choose an option

Web

SMS

Slack

Facebook

WhatsApp

Other

I'm not sure

Choose an option

What is your role on the team building the assistant?

Choose an option

Which statement describes your needs best?

Select a deployment choice to see what your customers experience

Welcome to the new Watson Assistant

Back

Next

Tell us where your assistant will live

Choose an option

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

Choose an option

What is your role on the team building the assistant?

Choose an option

Which statement describes your needs best?

Choose an option

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!

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

What is your role on the team building the assistant?

Choose an option

- Choose an option
- Lead strategist
- Content strategist or writer
- Designer
- Developer
- Project manager or scrum master
- Other

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Type something...

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

What is your role on the team building the assistant?

Developer

Which statement describes your needs best?

Choose an option

- Choose an option
- I want to provide confident answers to common questions
- I want to automate common tasks in a natural way
- I want to make it easier for my customers to find what they're looking for in my app
- I want to qualify leads before passing them to a salesperson
- I'm using Watson Assistant to complete a course or certification
- Not sure at this time.

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IBM Watson Assistant LiteUpgradeBanking Bot

Learning center

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Step 6:

Customize your Watson assistant by making it colourful.

IBM Watson Assistant LiteUpgradeBanking Bot

Learning center

Welcome to the new Watson Assistant

Can also use more advanced styling changes from code. [Learn more](#)

Assistant's name as known by customers

Watson Assistant

Primary color

#FFFFFF

Secondary color

#3D3D3D

Chat header

Accent color

#0354E9

Significant and interactive objects

IBM Watermark

Displays a link to the Watson Assistant dashboard

On

Add an avatar image

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

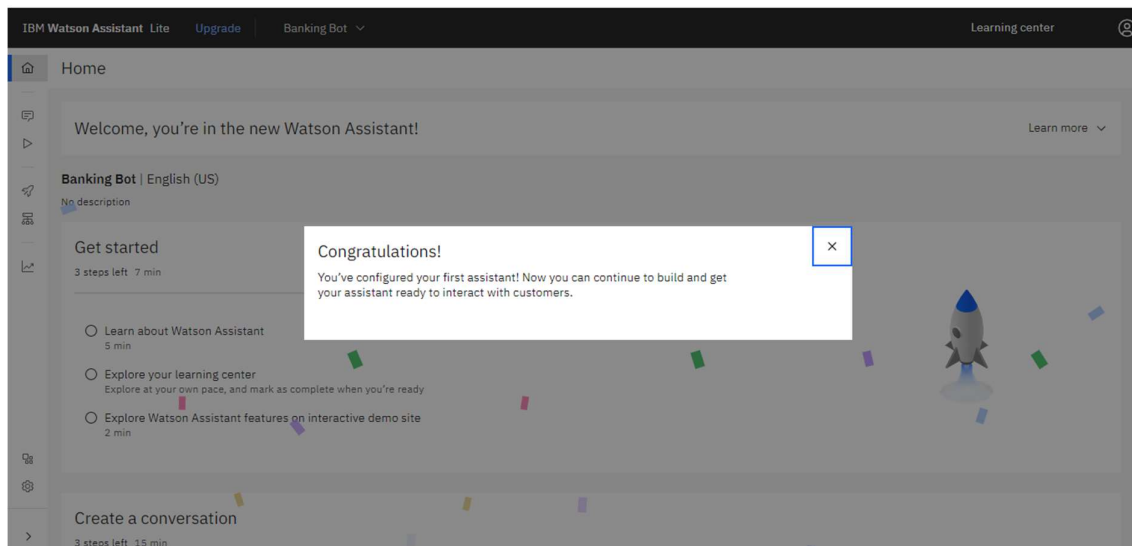
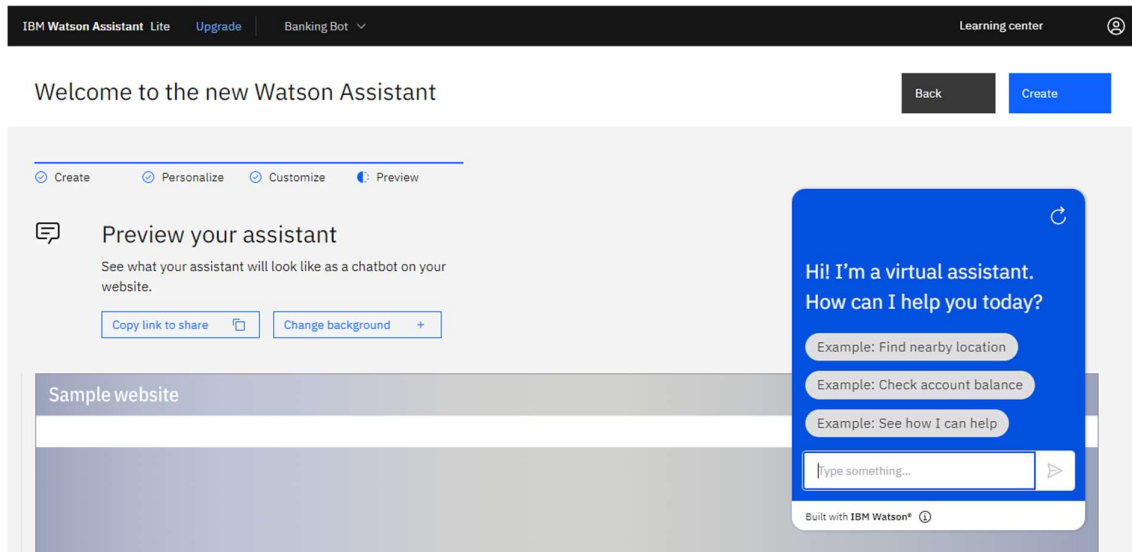
Example: Find nearby location

Example: Check account balance

Example: See how I can help

Step 7:

Now you can preview your assistant and the welcome page of the assistant will be visible to you.



IBM Watson Assistant LiteUpgradeBanking Bot

Learning center

Home

Welcome, you're in the new Watson Assistant!

Learn more

Banking Bot | English (US)

No description

Get started

3 steps left 7 min

0%

Learn about Watson Assistant

5 min

Explore your learning center

Explore at your own pace, and mark as complete when you're ready

Explore Watson Assistant features on interactive demo site

2 min

Create a conversation

3 steps left 15 min