

# Project Planning and Design Phase

## Creating Skills and Assistant for Chatbot

Date	26 October2022
TeamID	PNT2022TMID20787
ProjectName	AI-based discourse for Banking Industry

1. Chatbot Skill Creation
2. Saving account action
3. Creating Current account action
4. Creating General Query Action
5. Creating Net Banking Action

IBM Watson Assistant Lite Upgrade BankingBot Learning center ?

System is training...

### Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

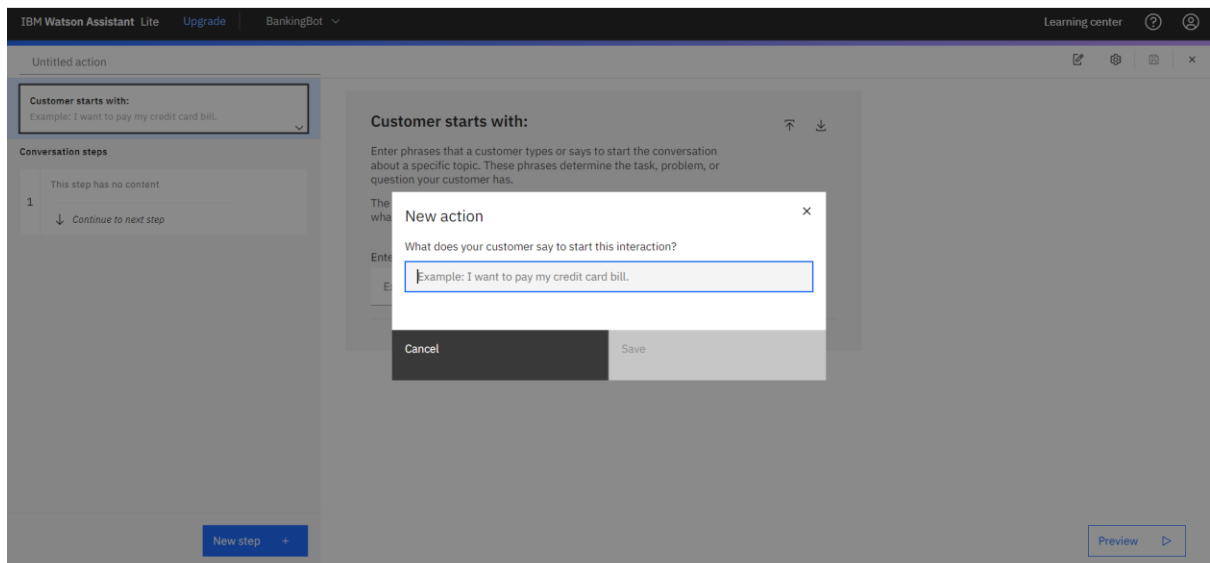
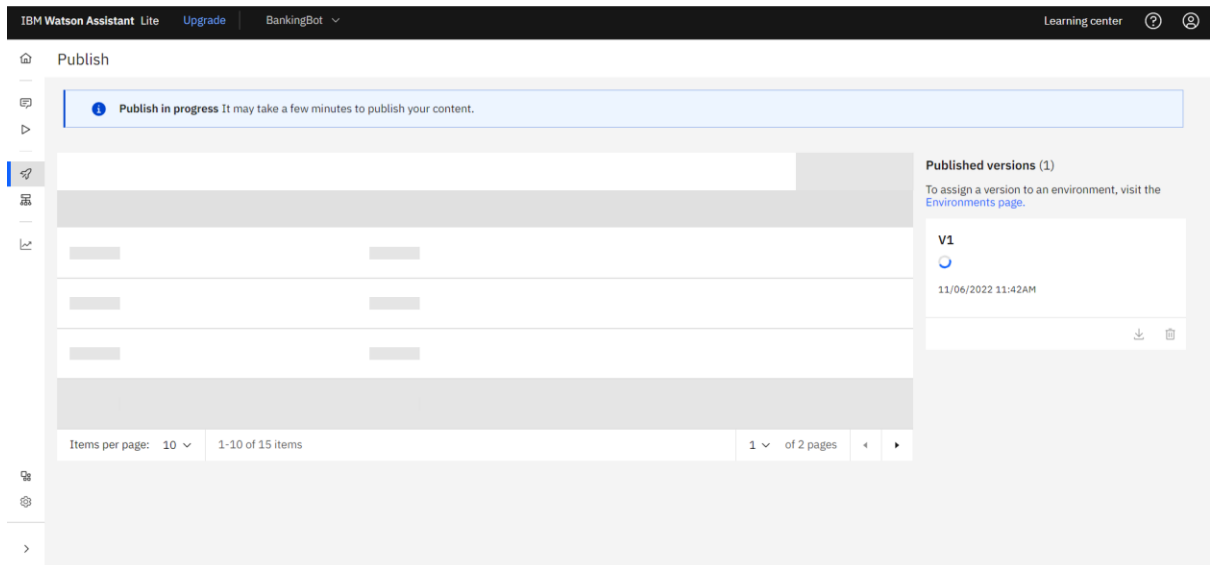
Actions sit at the core of the new Watson Assistant build process. Think of them as problems or tasks that your customers want your assistant to resolve for them. They include the complete interaction between a customer and your assistant for a specific question or request.

Find out more Take a tour Build with our guide

Name	Last edited	Examples Count	Status
Transfer funds	in a few seconds	19	✓
Create an account	a few seconds ago	22	✓

Items per page: 50 Showing 1–2 of 2 actions 1 1 of 1 pages

Preview



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Learning center

Create an account

Customer starts with:  
bank account

Conversation steps

1

I can help you with that! To create an account, we will need a few pieces of information. Let me guide...

Continue to next step

2

First, please provide your first name.

Free text

Continue to next step

3

Thanks! Now, enter your last name.

Free text

Continue to next step

4

Awesome. I'll also need an email address associated with your new account. We will need to...

Free text










Continue to next step

New step

Step 1 is takenwithout conditions

f

Assistant says

B I         

I can help you with that! To create an account, we will need a few pieces of information. Let me guide you through this process!

Define customer response

And then

Continue to next step

Preview

IBM Watson Assistant LiteUpgradeBankingBot

Learning center

Create an account

1

I can help you with that! To create an account, we will need a few pieces of information. Let me guide...

Continue to next step

2

First, please provide your first name.

Free text

Continue to next step

3

Thanks! Now, enter your last name.

Free text

Continue to next step

4

Awesome. I'll also need an email address associated with your new account. We will need to...

Regex

Continue to next step










For added security, we can also add a phone number to your account. Would you like to do so?

New step

Step 3 is takenwithout conditions

f

Assistant says

B I         

Thanks! Now, enter your last name.

User enters free text

Edit responseEdit validation

And then

Continue to next step

Preview

IBM Watson Assistant LiteUpgradeBankingBot

Learning center

Create an account

4

Continue to next step

5

No, my email...Yes, I'd like t...

Continue to next step

5

is

Yes, I'd like to add a phone number.

Okay, please enter your phone number below.

6

Continue to next step

5

is

No, my email will do just fine.

7

No problem, let's keep going!

Continue to next step

Finally, I'll also need your date of birth in MMDDYYYY format. This will also serve as your 8-...

New step +

Step 6 is takenwith conditions

Conditions1 condition

IfAll of this is true:

5. For added secur...isYes, I'd like to add a phone number.

andAdd condition +

New condition group +

Assistant says

Okay, please enter your phone number below.

Assistant recognizes pattern in user's text

Preview

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Learning center

Create an account

Confirmation

Continue to next step

6

is not

Defined

5

is

No, my email will do just fine.

10

Thanks! Does the following information look correct? If so, I will proceed with creating your...

Confirmation

Continue to next step

9

is

No

10

is

No

Sorry about that. Let's try this again.

11

Re-ask previous step(s)

9

is

Yes

10

is

Yes

You did it! Your new account is being created and you will receive an email confirmation shortly. <b...

Action complete

New step +

Step 12 is takenwith conditions

Conditions2 conditions

IfAny of this is true:

9. Thanks! Does the ...isYes

or

10. Thanks! Does th...isYes

orAdd condition +

New condition group +

Assistant says

You did it! Your new account is being created and you will receive an email confirmation shortly. Welcome!

Preview

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Learning center

Set up autopay

Customer starts with:  
online banking

Conversation steps

1

To set up autopay, please enter your email address below.

Regex

Continue to next step

2

Great. Next, please enter your date of birth in MM-DD-YYYY format.

Date

Continue to next step

3

Thanks for the information. We've found you in our system! <br /> To configure autopay, we'll need...

Account x00... Account x01... + 2

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 actionTotal: 9

Enter a phrase

Set up autopay

Recurring payments

Recurring billing

I'd like to configure auto-pay

Frequent payments

Preview

IBM Watson Assistant LiteUpgradeBankingBot

Learning center

Set up autopay

online banking

Conversation steps

1

To set up autopay, please enter your email address below.

Regex

Continue to next step

2

Great. Next, please enter your date of birth in MM-DD-YYYY format.

Date

Continue to next step

3

Thanks for the information. We've found you in our system! <br /> To configure autopay, we'll need...

Account x00... Account x01... + 2

Continue to next step

3

is

A different account

OK. Please enter the account number from which

New step +

Step 2 is takenwithout conditions

Assistant says

Great. Next, please enter your date of birth in MM-DD-YYYY format.

mm/dd/yyyy

Edit responseEdit validation

And then

Continue to next step

Preview