

PROJECT DEVELOPMENT PHASE
AI Based Discourse for Banking Industry

PNT2022TMID12391

SPRINT 1 (Building of Assistant)

As Per Sprint Delivery Plan ,Sprint 1 includes

User Story – 1 : Creation of Banking Chatbot or Assistant using IBM Watson Assistant/ As a user, I can see a Banking Assistant

User Story – 2 : Understanding Customer's Banking Related Queries and skills/ As a user, I can see a Chatbot with Banking skills

Created IBM Watson Assistant Service

Mail - NAGA SAPTA AAKASH x IBM x (3) WhatsApp x Obtain an IBM Cloud Feature x IBM Watson Service Page x Password reset on ICT Acad x

cloud.ibm.com/services/conversation/cm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aau-syd%3Aa%2F932387b2c54c45dea6baec41396c8926%3A3bd80df1-2c51-48a6-9ae2-3b3adff05...

Gmail YouTube Maps ultrasonic sensorm...

IBM Cloud

Search resources and products...

Catalog Manage Naga Sapta Aakash's A...

Details Actions...

Resource list /

Watson Assistant-4e Active Add tags

Manage

Service credentials

Plan

Connections

Start by launching the tool

Launch Watson Assistant Getting started tutorial API reference

Credentials

Download Show credentials

API key:

URL: https://api.au-syd.assistant.watson.cloud.ibm.com/instances/3bd80df1-2c51-48a6-9ae2-3b3adff05...

Plan

Lite

Upgrade

25°C Partly cloudy

Windows Taskbar

ENG IN 21:42 17-11-2022

Watson Assistant


IBM Watson Assistant Lite Upgrade

Learning center

Welcome to the new Watson Assistant

Next

CreatePersonalizeCustomizePreview

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 Chat Bot

Your assistant name will be kept internally and not visible to your customers

Description (optional)

This banking bot will answer the user's queries related to account creation, loan, net banking and other general queries

120/128


Inbox (1,664) - jeevithakesavaraIBMIBM Watson Service PageIBM Watson Assistant

us-south.assistant.watson.cloud.ibm.com/cm%3Av1%3Abluemix%3APublic%3Aconversation%3Aus-south%3Aa%2F0cd42653c542475797a27fd12b714a82%3Aea7...YouTubeGmailSpotify - Jeevithake...WhatsAppGOVERNMENT COL...IBM-EPBL/IBM-Proj...

IBM Watson Assistant Lite UpgradeBanking botLearning center

Welcome to the new Watson Assistant

BackNext

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

Watson Assistant

Primary color

#FFFFFF

Secondary color

#3D3D3D

Chat header

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

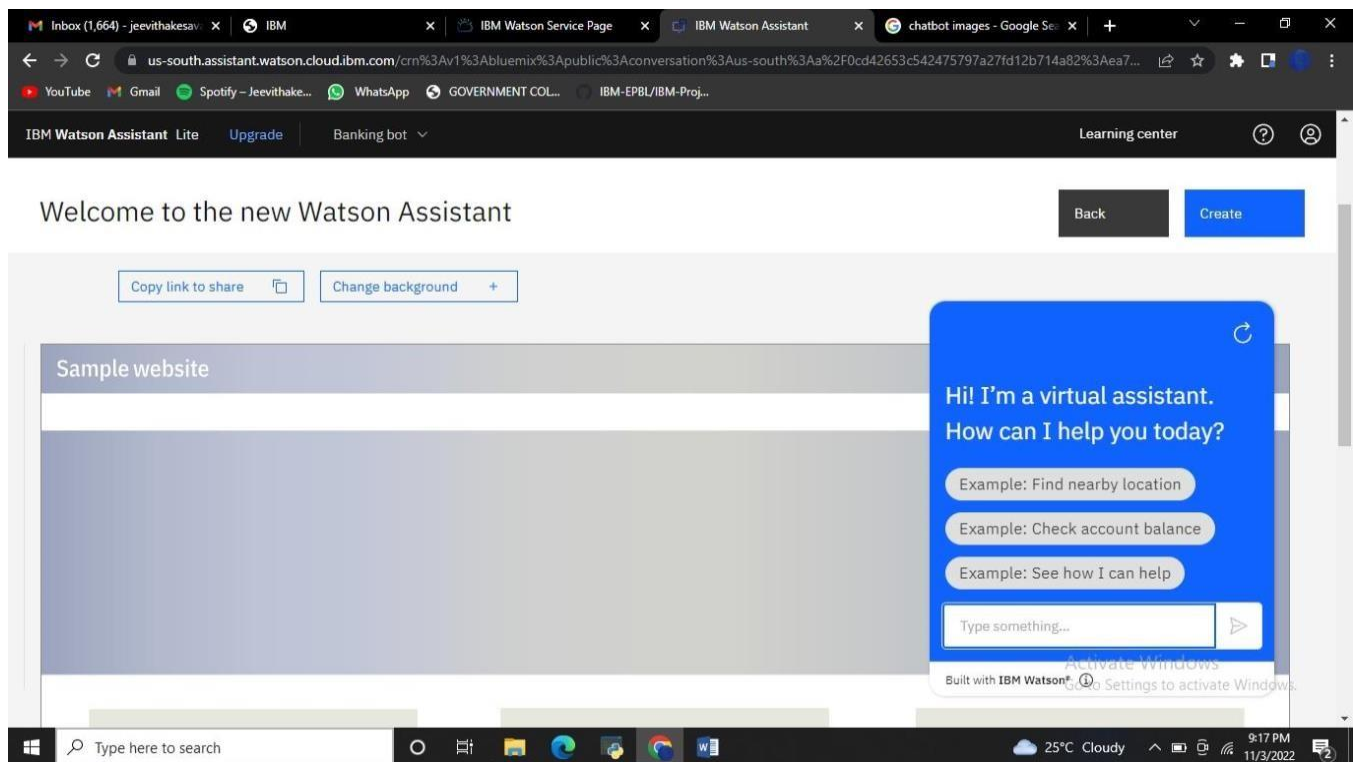
Example: Check account balance

Example: See how I can help

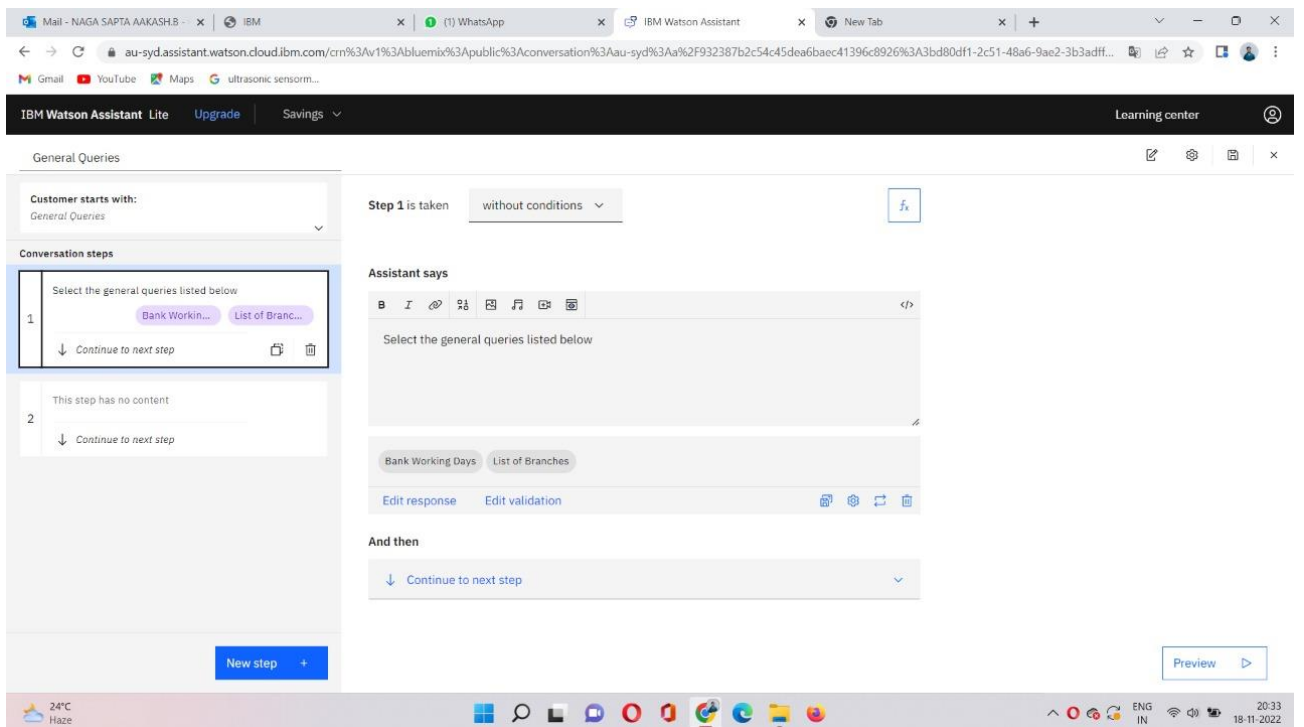
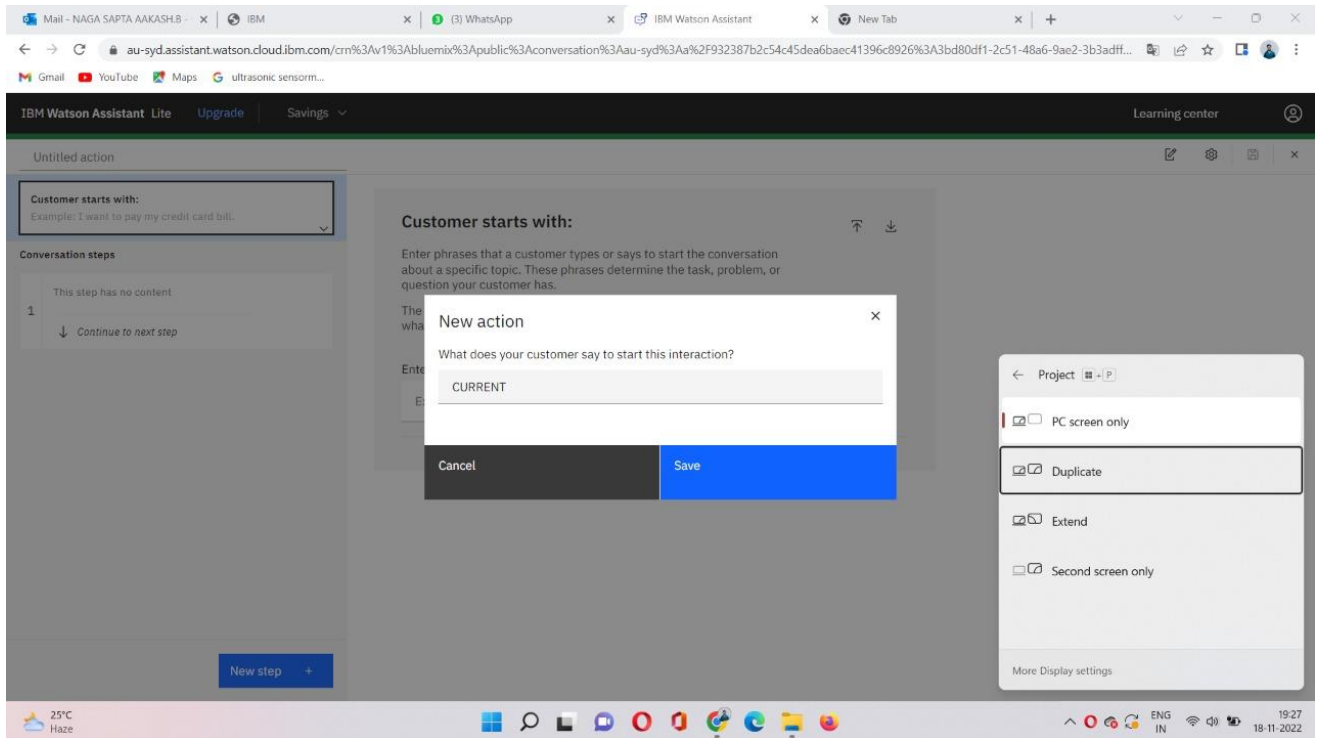
Type here to search

25°C Cloudy9:15 PM11/3/2022

Preview



Created Skills and Assistant for Chatbot



Skills (Actions) created

- Account Creation
- Contact information
- General Banking Queries
- Loan Related Queries
- Net Banking Queries

IBM Watson Assistant Lite Upgrade Banking bot Learning center ?

Actions

System is trained

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

| Name | Last edited | Examples Count | Status | |
|-----------------------------|-------------------|----------------|--------|---|
| Net banking | a few seconds ago | 1 | ✓ | ⋮ |
| Create an account | 4 minutes ago | 1 | ✓ | ⋮ |
| Request contact information | 3 minutes ago | 1 | ✓ | ⋮ |
| General Queries | 2 minutes ago | 1 | ✓ | ⋮ |
| Loan | a minute ago | 1 | ✓ | ⋮ |

Items per page: 50 Showing 1–5 of 5 actions

1 1 of 1 pages

Activate Windows
Go to Settings to activate Windows.
Preview

Type here to search

25°C Cloudy 9:47 PM 11/3/2022

Chatbot Sample Working Preview

Preview



Greet customer [default]

Welcome, how can I assist you?

I need to create an account

Create an account recognized

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

Yes

No

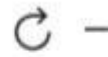
Activate Windows

Use the up arrow for prior messages

Go to Settings to activate Windows



Preview



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

Yes

No

Yes

Do you want a savings account or current account?

Savings account

Current account

Savings account

Activate Windows

Type something...

Go to Settings to activate Windows



