

Project Planning and Design Phase

Creating Skills and Assistant for Chatbot

Date	26 October2022
TeamID	PNT2022TMID22969
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

The screenshot shows the IBM Watson Assistant interface. The top navigation bar includes 'IBM Watson Assistant Lite', 'Upgrade', and 'BankingBot'. The sidebar on the left has 'Actions', 'Variables', and 'Saved responses'. The main content area is titled 'Actions' and shows a table of actions created by the user. The table has columns for Name, Last edited, Examples Count, and Status. Two actions are listed: 'Transfer funds' and 'Create an account'. A 'New action' button is in the top right of the table. A 'Preview' button is at the bottom right. A system message at the top right says 'System is training...'.

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

IBM Watson Assistant Life Upgrade BankingBot Learning center

Publish

Publish in progress It may take a few minutes to publish your content.

Published versions (1)

To assign a version to an environment, visit the [Environments page](#).

V1

11/06/2022 11:42AM

Items per page: 10 1-10 of 15 items 1 of 2 pages

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Untitled action

Customer starts with:
Example: I want to pay my credit card bill.

Conversation steps

1 This step has no content
Continue to next 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.

New action

What does your customer say to start this interaction?

Example: I want to pay my credit card bill.

Cancel Save

New step + Preview

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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.
↓ Continue to next step
- 3 Thanks! Now, enter your last name.
↓ Continue to next step
- 4 Awesome. I'll also need an email address associated with your new account. We will need to...

New step +

Step 1 is taken without conditions

Assistant says

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

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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.
↓ Continue to next step
- 3 Thanks! Now, enter your last name.
↓ Continue to next step
- 4 Awesome. I'll also need an email address associated with your new account. We will need to...
↓ Continue to next step

New step +

Step 3 is taken without conditions

Assistant says

Thanks! Now, enter your last name.

User enters free text

Edit response Edit validation

And then

Continue to next step

Preview

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us-southassistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F303cbaf27e1a4ab6a684c73855421d3a%3A18e4734c-3629-48a6-bd30-76e...

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Create an account

Step 6 is taken with conditions

Conditions

1 condition

If All of this is true:

5. For added securit... is Yes, I'd like to add a phone number.

and Add condition +

New condition group +

Assistant says

Okay, please enter your phone number below.

Preview

Assistant recognizes pattern in user's text

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us-southassistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F303cbaf27e1a4ab6a684c73855421d3a%3A18e4734c-3629-48a6-bd30-76e...

IBM Watson Assistant Lite Upgrade BankingBot Learning center

Create an account

Step 12 is taken with conditions

Conditions

2 conditions

If Any of this is true:

9. Thanks! Does the ... is Yes

or 10. Thanks! Does th... is Yes

or Add 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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us-southassistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F303cbaf27e1a4ab6a684c73855421d3a%3A18e4734c-3629-48a6-bd30-76e...

IBM Watson Assistant Lite Upgrade BankingBot Learning center

Set up autopay

Customer starts with: online banking

Conversation steps

- To set up autopay, please enter your email address below.
1. [Regex] Continue to next step
- Great. Next, please enter your date of birth in MM-DD-YYYY format.
2. [Date] Continue to next step
- Thanks for the information. We've found you in our system!
 To configure autopay, we'll need...
3. [Account x00...] [Account x01...] + 2 Continue to next 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: 9

Enter a phrase

- Set up autopay
- Recurring payments
- Recurring billing
- I'd like to configure auto-pay
- Frequent payments

Preview

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us-southassistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F303cbaf27e1a4ab6a684c73855421d3a%3A18e4734c-3629-48a6-bd30-76e...

IBM Watson Assistant Lite Upgrade BankingBot Learning center

Set up autopay

online banking

Conversation steps

- To set up autopay, please enter your email address below.
1. [Regex] Continue to next step
- Great. Next, please enter your date of birth in MM-DD-YYYY format.
2. [Date] Continue to next step
- Thanks for the information. We've found you in our system!
 To configure autopay, we'll need...
3. [Account x00...] [Account x01...] + 2 Continue to next step

Step 2 is taken without conditions

Assistant says

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

mm/dd/yyyy

Edit response Edit validation

And then

Continue to next step

Preview