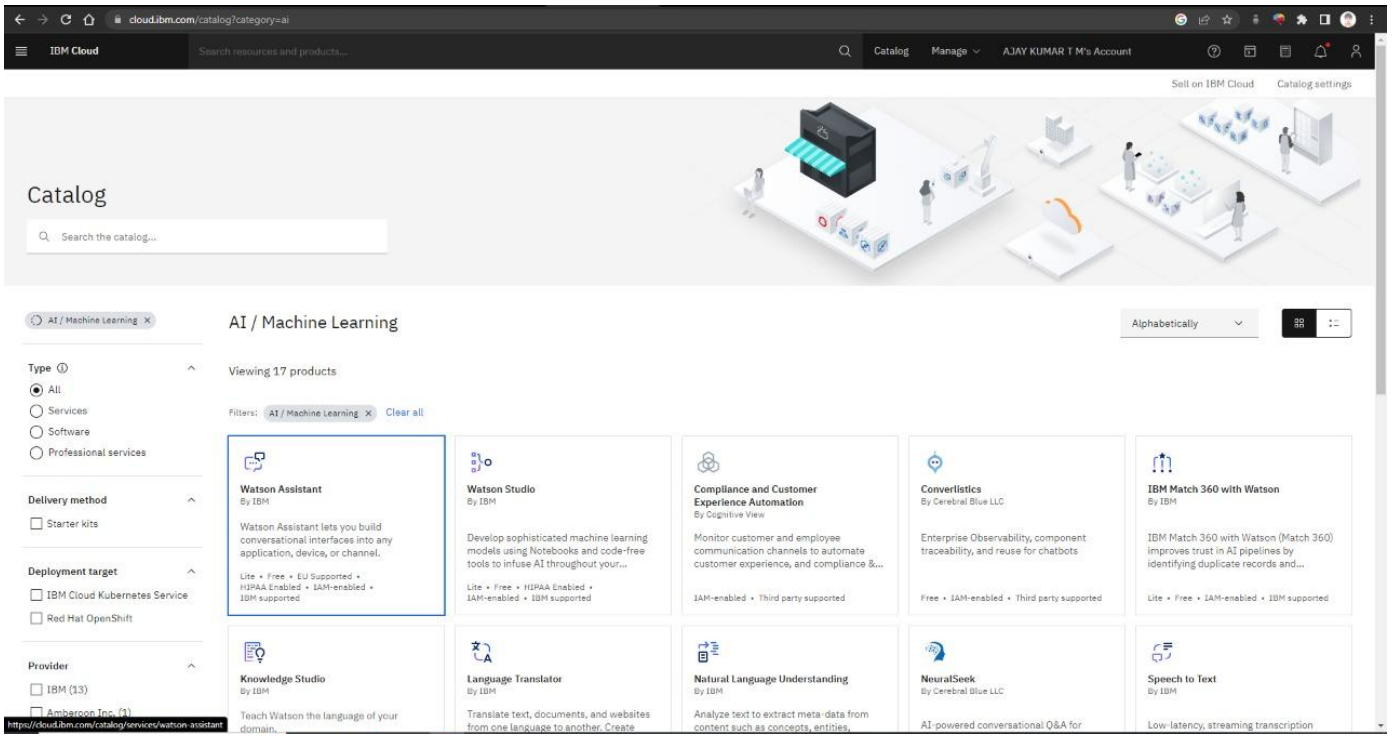
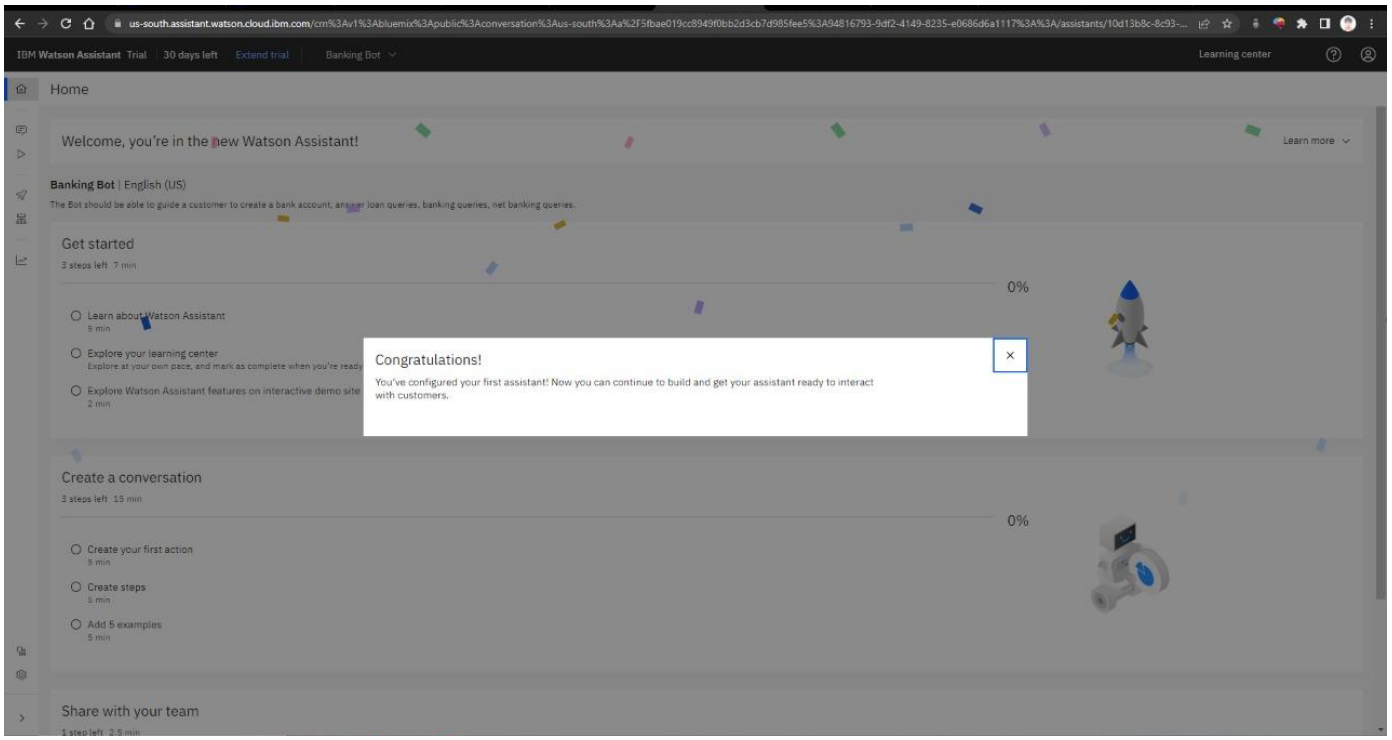
Project Development Phase
Sprint I

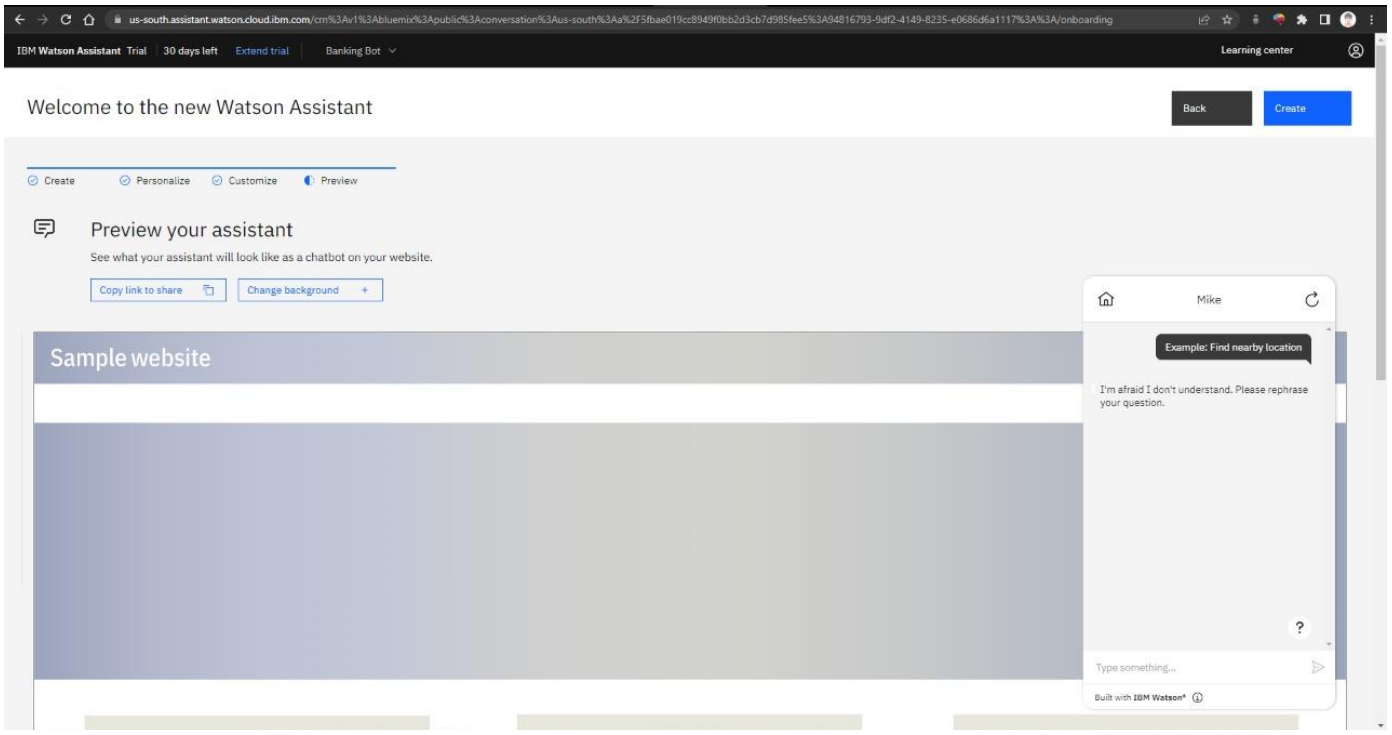
Date	29 October 2022
Team ID	PNT2022TMID15597
Project Name	AI based discourse for Banking Industry

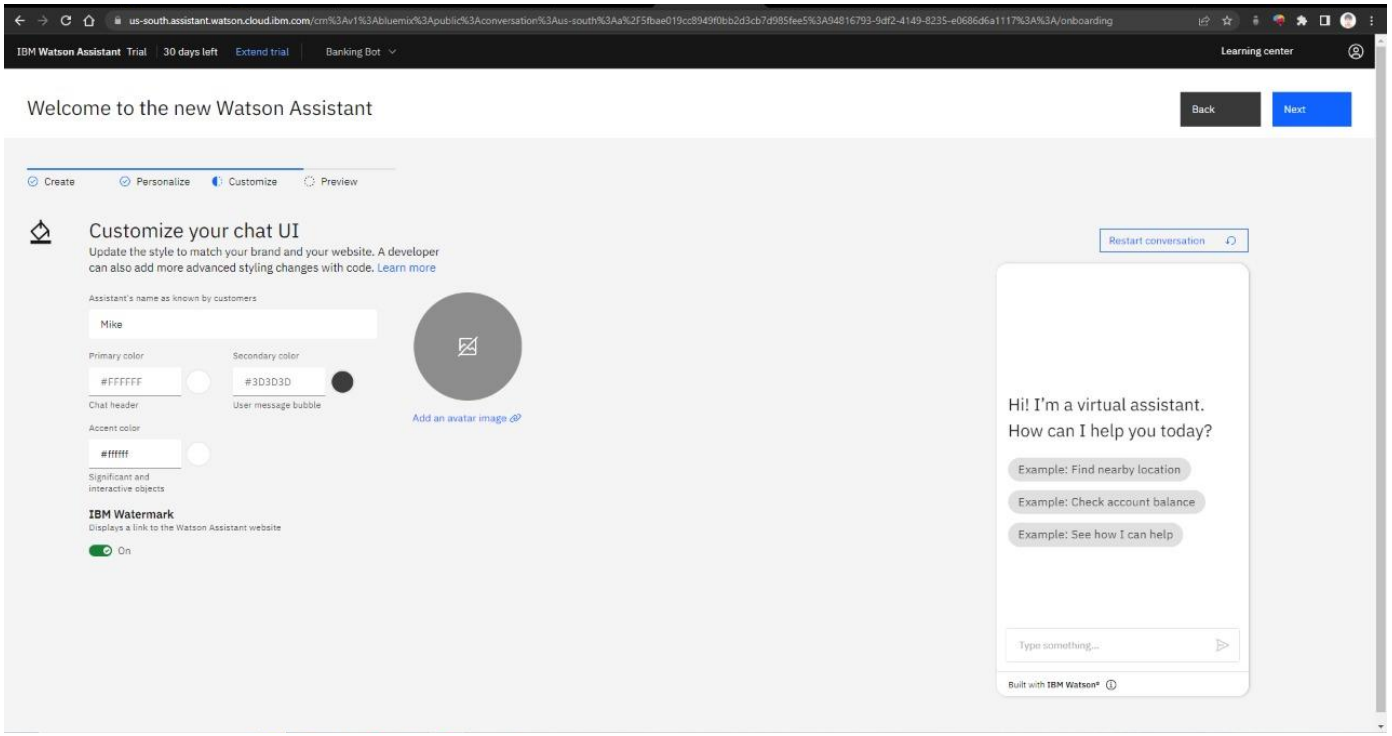
Screenshots of Sprint - 1 tasks :

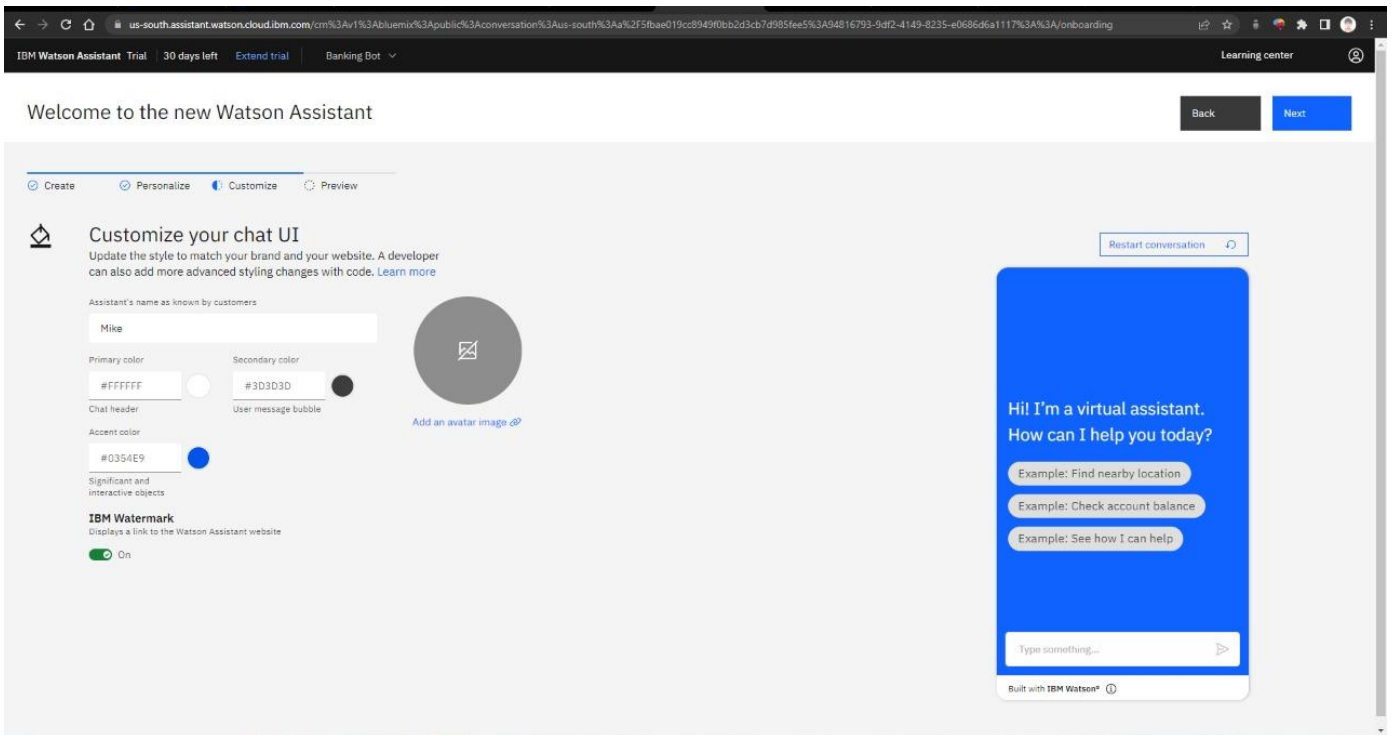
Create IBM Watson Assistant Service :

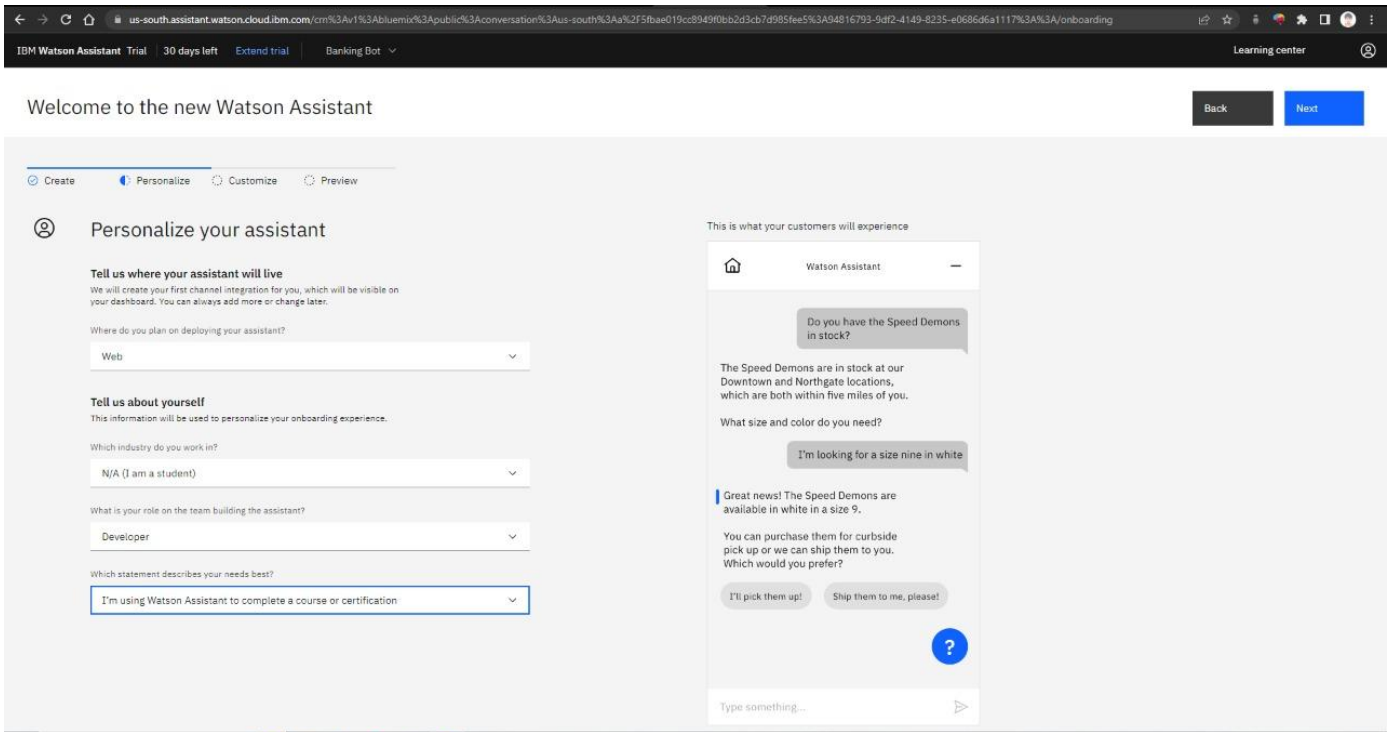


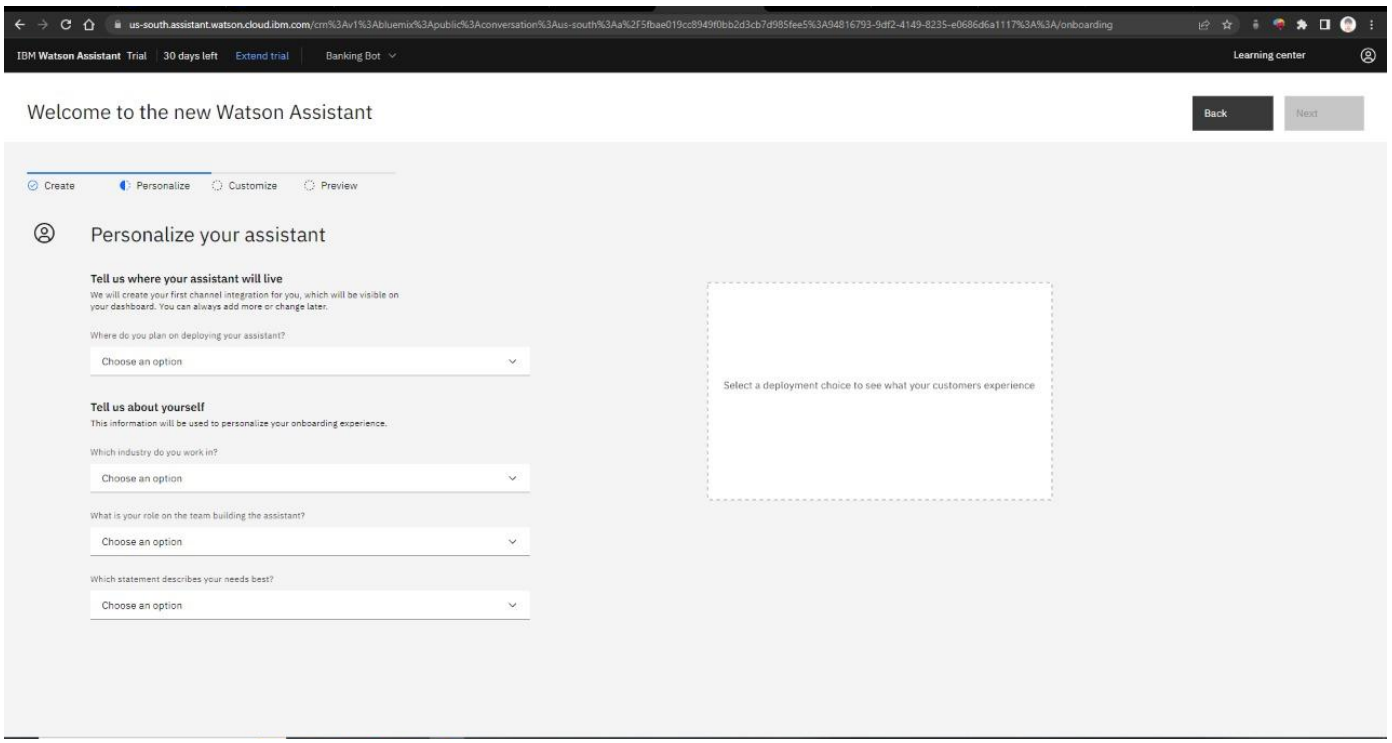

IBM Watson Assistant Trial
30 days left
Extend trial
Banking Bot
Learning center
Home
Welcome, you're in the new Watson Assistant!
Learn more
Banking Bot | English (US)
Get started
3 steps left 7 min
0%
Learn about Watson Assistant
5 min
Explore your learning center
Explore Watson Assistant features on interactive demo site
2 min
Congratulations!
You've configured your first assistant! Now you can continue to build and get your assistant ready to interact with customers.
Create a conversation
3 steps left 15 min
0%
Create your first action
5 min
Create steps
5 min
Add 5 examples
5 min
Share with your team

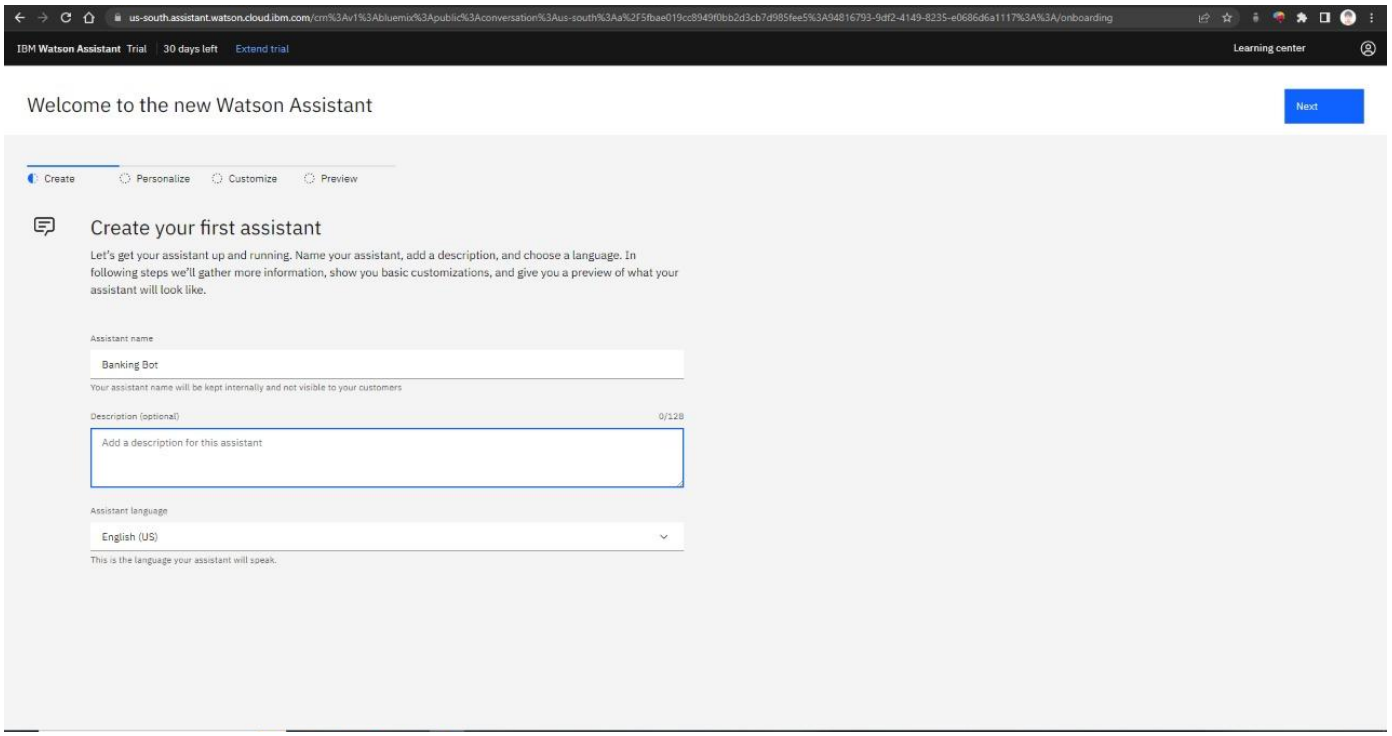

IBM Watson Assistant Trial
30 days left
Extend trial
Banking Bot
Learning center
Welcome to the new Watson Assistant
Back
Create
Create
Personalize
Customize
Preview
Preview your assistant
See what your assistant will look like as a chatbot on your website.
Copy link to share
Change background
Sample website
Mike
Example: Find nearby location
I'm afraid I don't understand. Please rephrase your question.
Type something...
Built with IBM Watson®

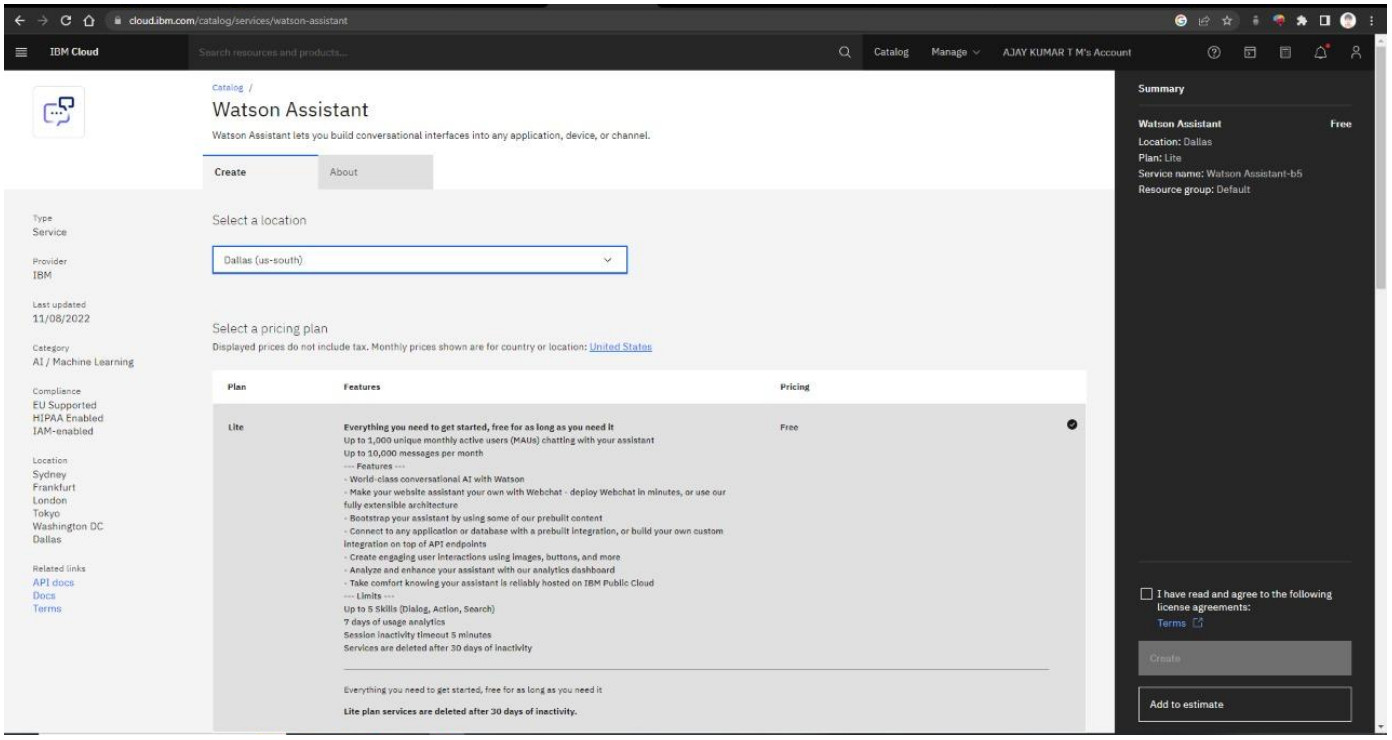

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/onboarding
IBM Watson Assistant Trial
30 days left
Extend trial
Banking Bot
Learning center
Welcome to the new Watson Assistant
Back
Next
Create
Personalize
Customize
Preview
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
Mike
Primary color
#FFFFFF
Chat header
Secondary color
#3D3D3D
User message bubble
Add an avatar image
Accent color
#ffffff
Significant and interactive objects
IBM Watermark
Displays a link to the Watson Assistant website
On
Restart conversation
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 something...
Built with IBM Watson®


us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/onboarding
IBM Watson Assistant Trial
30 days left
Extend trial
Banking Bot
Learning center
Welcome to the new Watson Assistant
Back
Next
Create
Personalize
Customize
Preview
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
Mike
Primary color
#FFFFFF
Chat header
Secondary color
#3D3D3D
User message bubble
Add an avatar image
Accent color
#0354E9
Significant and interactive objects
IBM Watermark
Displays a link to the Watson Assistant website
On
Restart conversation
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 something...
Built with IBM Watson®

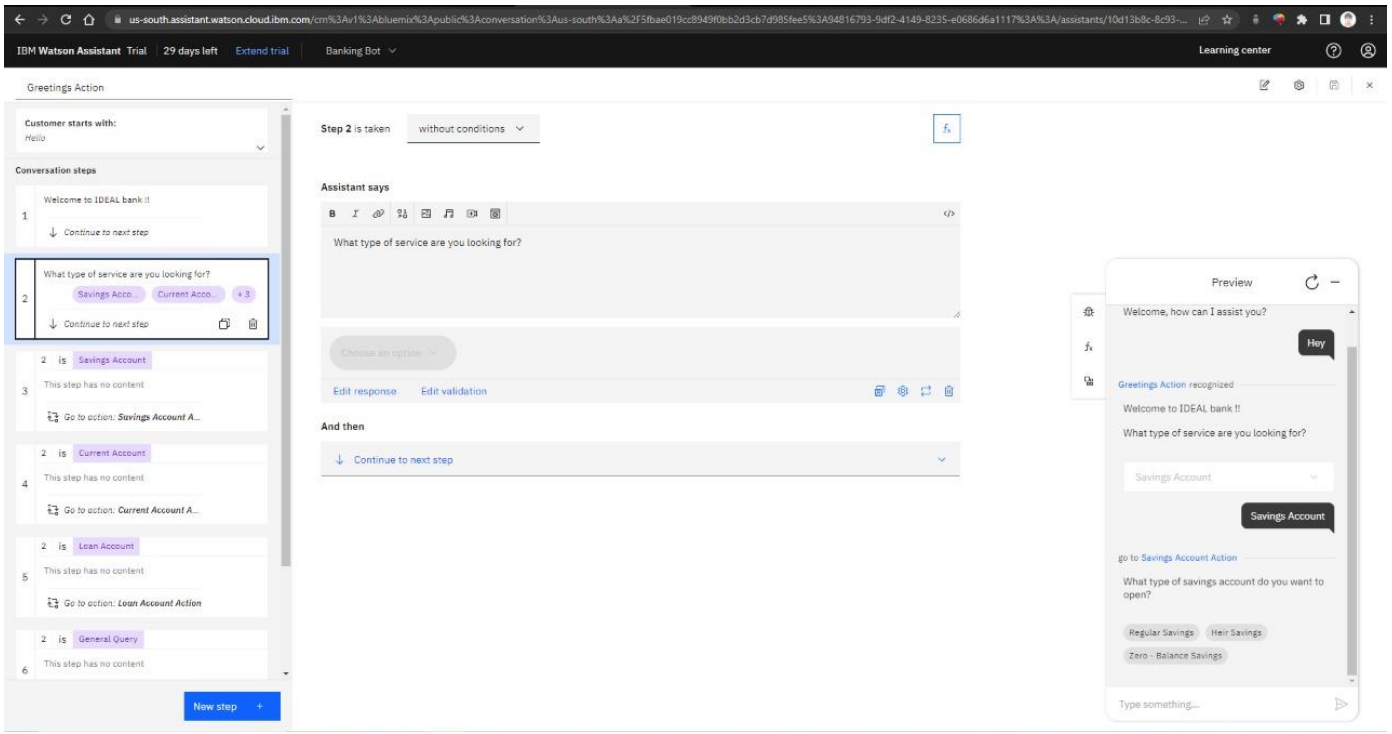

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/onboarding
IBM Watson Assistant Trial
30 days left
Extend trial
Banking Bot
Learning center
Welcome to the new Watson Assistant
Back
Next
Create
Personalize
Customize
Preview
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?
Web
Tell us about yourself
This information will be used to personalize your onboarding experience.
Which industry do you work in?
N/A (I am a student)
What is your role on the team building the assistant?
Developer
Which statement describes your needs best?
I'm using Watson Assistant to complete a course or certification
This is what your customers will experience
Watson Assistant
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!
Type something...

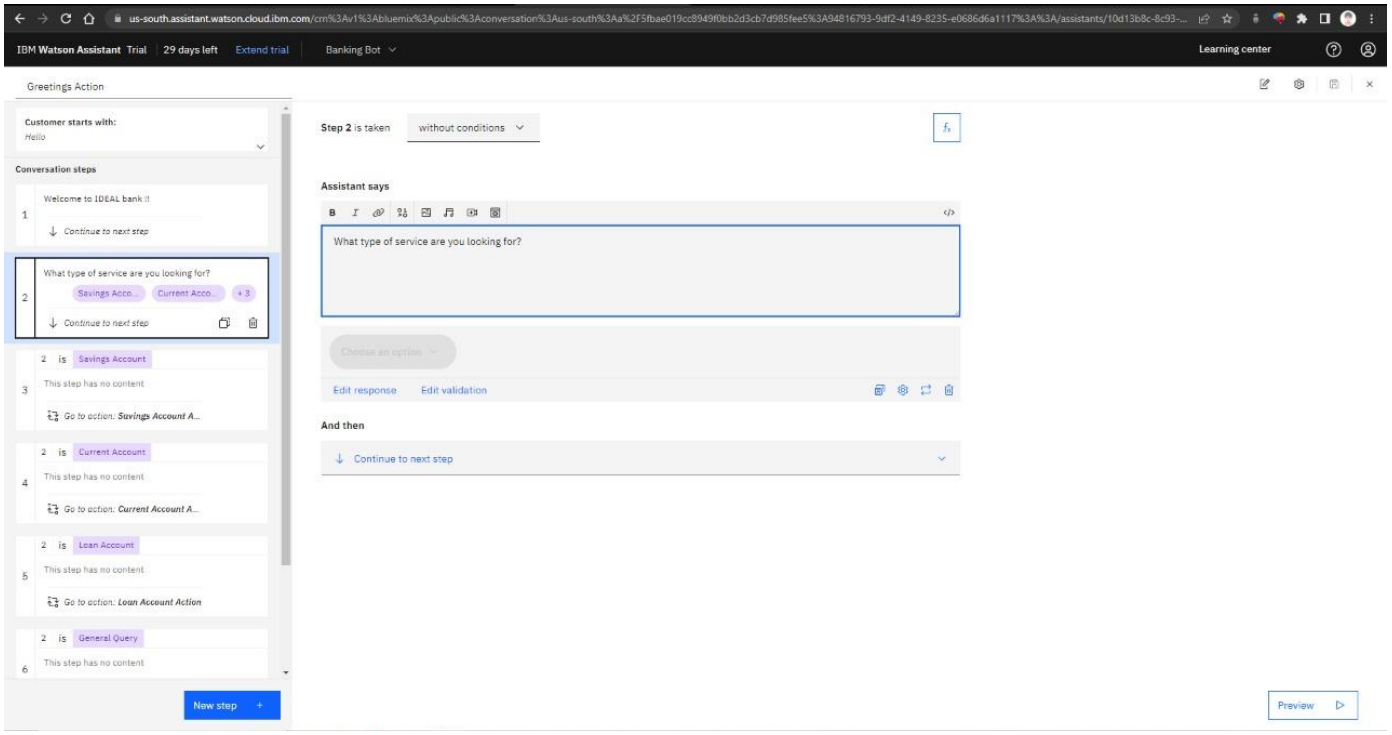

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/onboarding
IBM Watson Assistant Trial
30 days left
Extend trial
Banking Bot
Learning center
Welcome to the new Watson Assistant
Back
Next
Create
Personalize
Customize
Preview
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
Tell us about yourself
This information will be used to personalize your onboarding experience.
Which industry do you work in?
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
Select a deployment choice to see what your customers experience

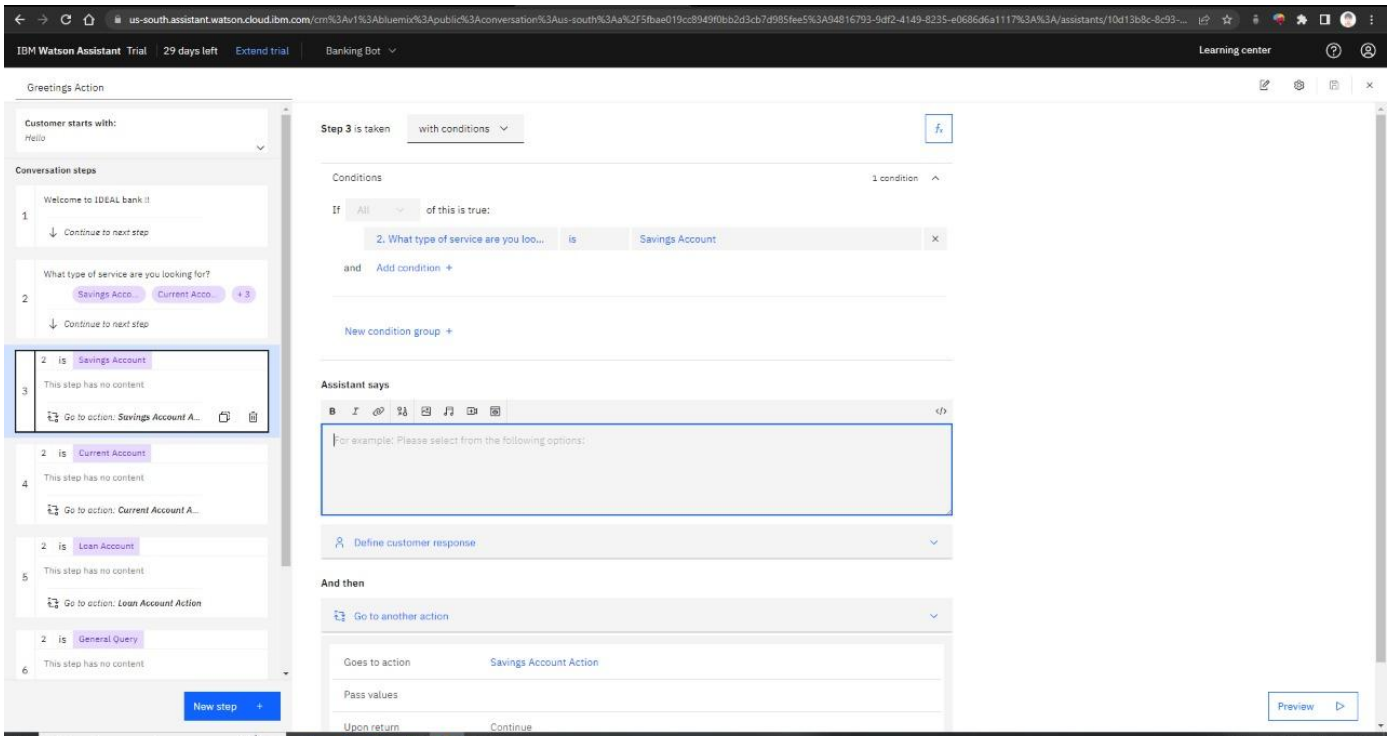


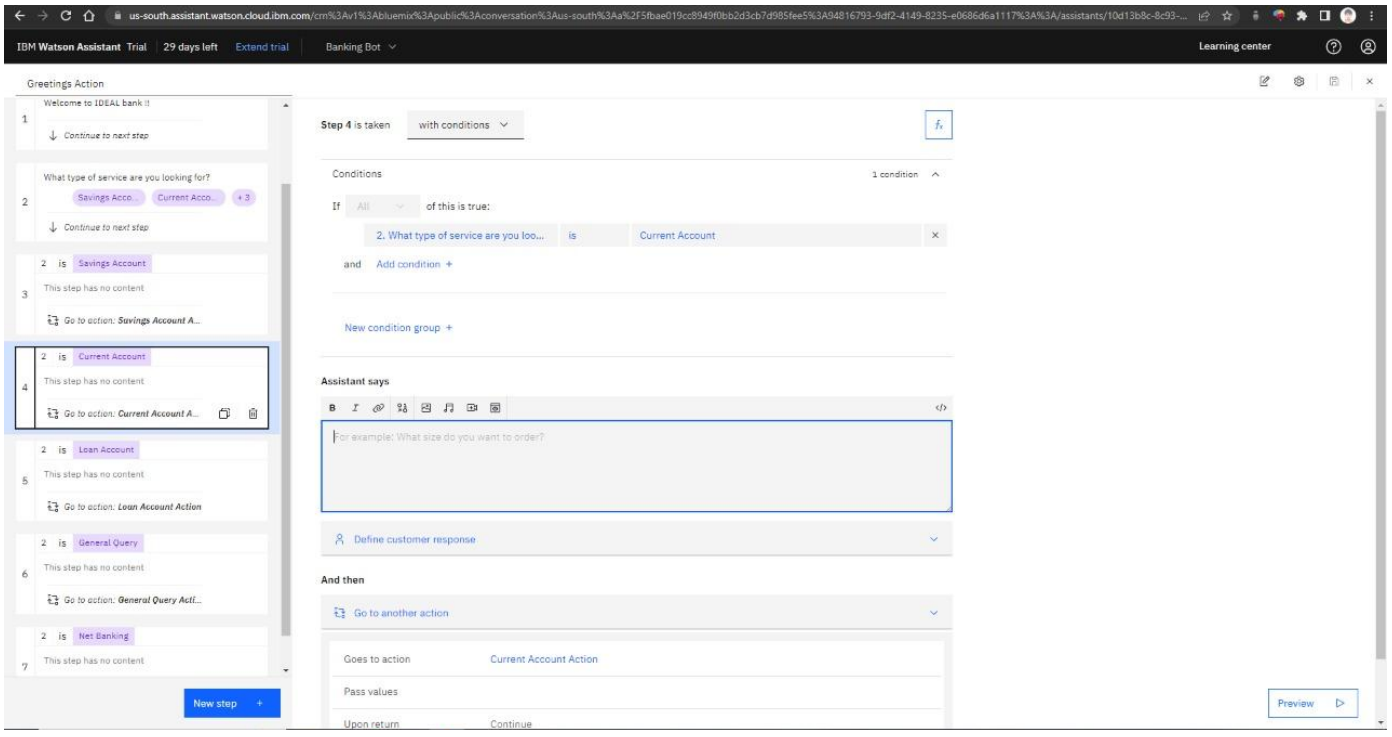


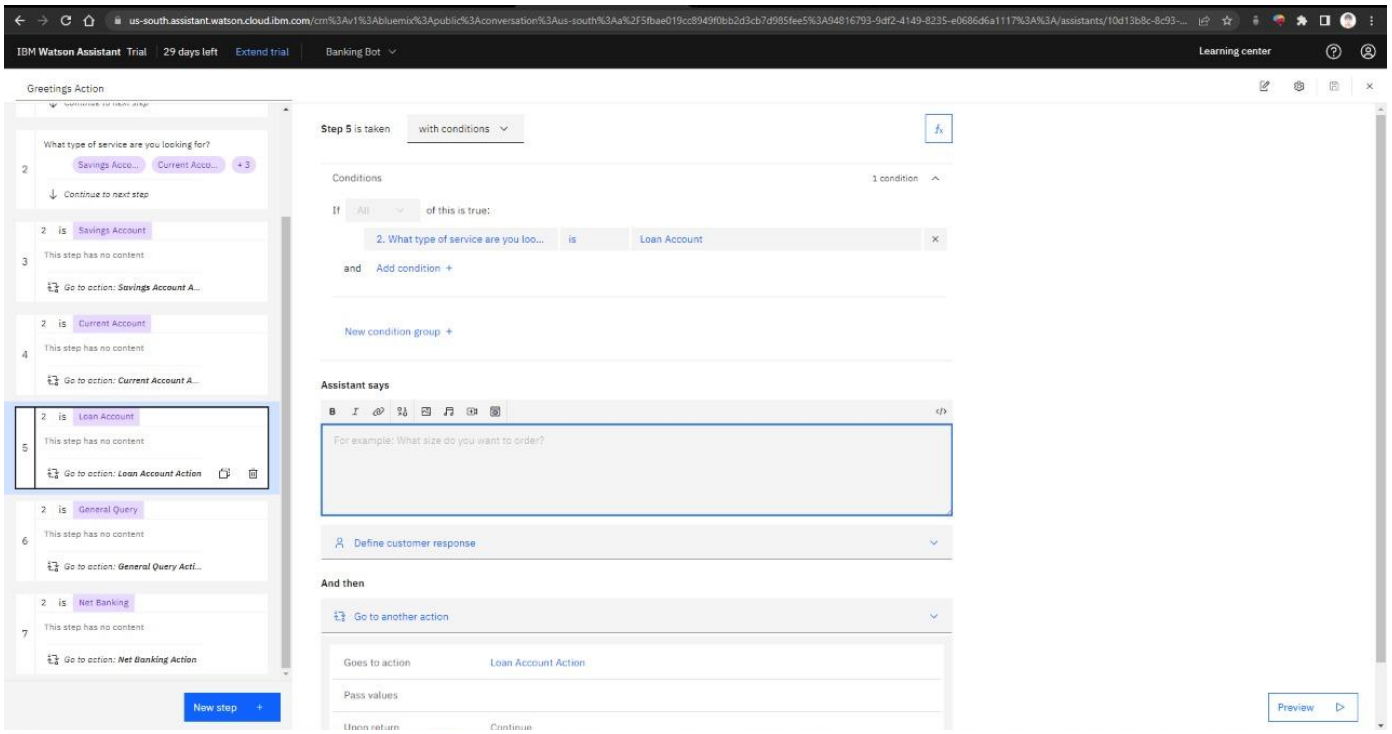
Chatbot Skills Creation :

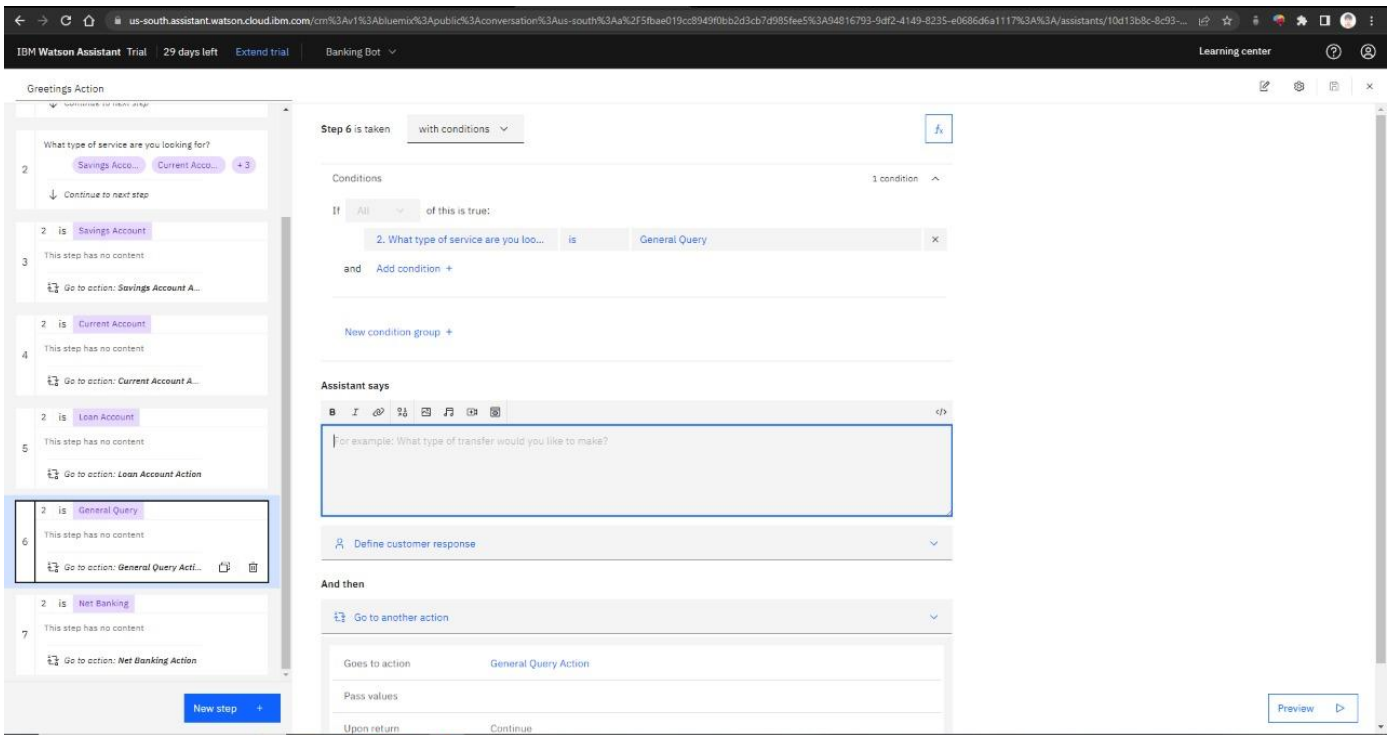

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/assistants/10d13b8c-8c93-...
IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Greetings Action
Customer starts with:
Hello
Conversation steps
1 Welcome to IDEAL bank !!
Continue to next step
2 What type of service are you looking for?
Savings Acco...
Current Acco...
+ 3
Continue to next step
3 2 is Savings Account
This step has no content
Go to action: Savings Account A...
4 2 is Current Account
This step has no content
Go to action: Current Account A...
5 2 is Loan Account
This step has no content
Go to action: Loan Account Action
6 2 is General Query
This step has no content
New step
Step 2 is taken
without conditions
Assistant says
What type of service are you looking for?
Choose an option
Edit response
Edit validation
And then
Continue to next step
Preview
Welcome, how can I assist you?
Hey
Greetings Action recognized
Welcome to IDEAL bank !!
What type of service are you looking for?
Savings Account
Savings Account
go to Savings Account Action
What type of savings account do you want to open?
Regular Savings
Heir Savings
Zero - Balance Savings
Type something...

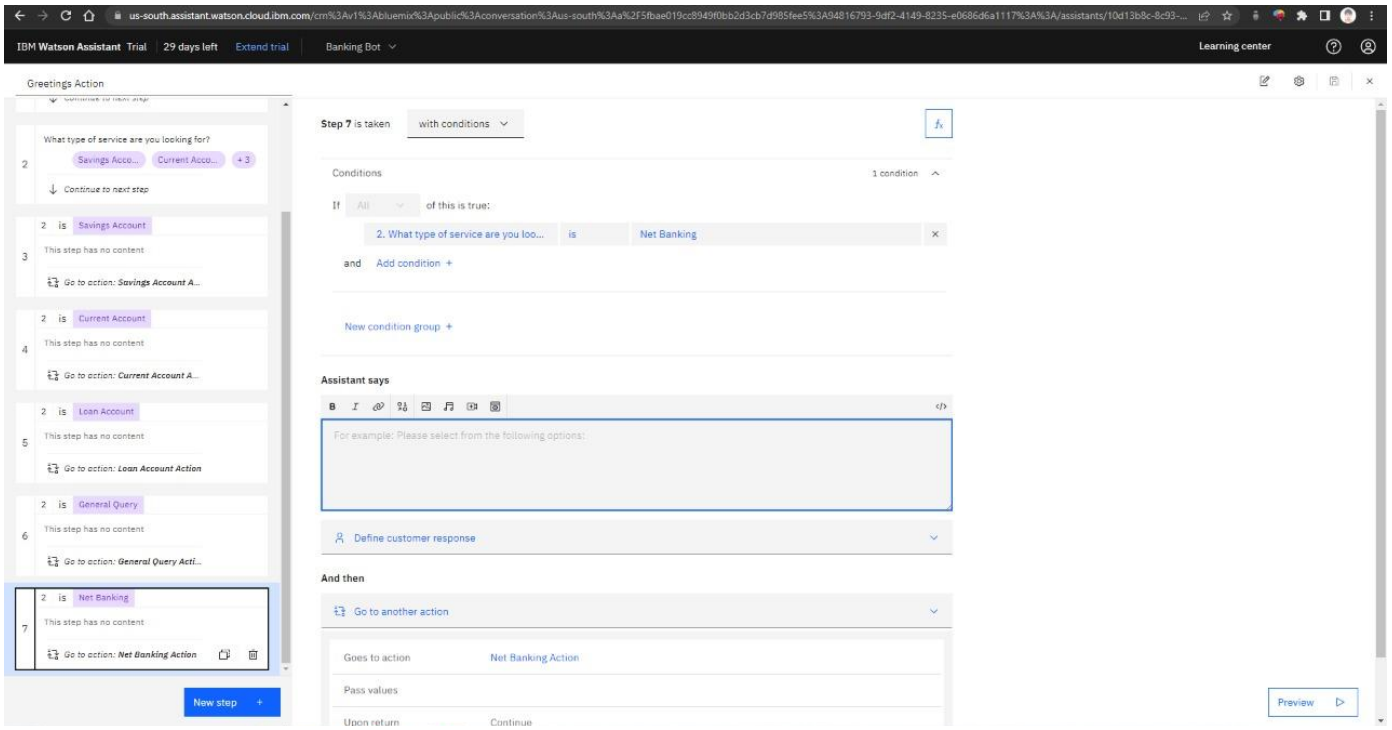

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/assistants/10d13b8c-8c93-...
IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Greetings Action
Customer starts with:
Hello
Conversation steps
1 Welcome to IDEAL bank !!
Continue to next step
2 What type of service are you looking for?
Savings Acco...
Current Acco...
+ 3
Continue to next step
3 2 is Savings Account
This step has no content
Go to action: Savings Account A...
4 2 is Current Account
This step has no content
Go to action: Current Account A...
5 2 is Loan Account
This step has no content
Go to action: Loan Account Action
6 2 is General Query
This step has no content
New step
Step 2 is taken
without conditions
Assistant says
What type of service are you looking for?
Choose an option
Edit response
Edit validation
And then
Continue to next step
Preview

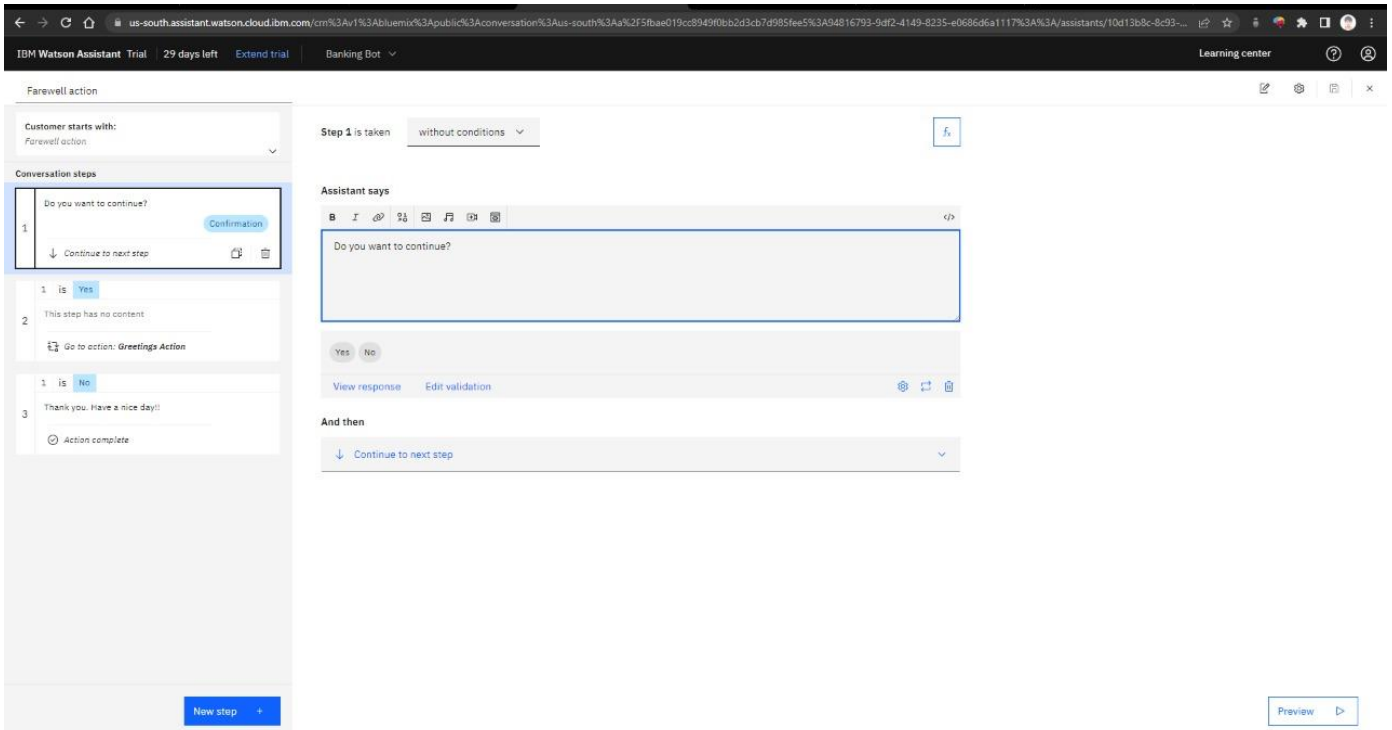

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/assistants/10d13b8c-8c93-...
IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Greetings Action
Customer starts with:
Hello
Conversation steps
1 Welcome to IDEAL bank !!
Continue to next step
2 What type of service are you looking for?
Savings Acco...
Current Acco...
+ 3
Continue to next step
3 2 is Savings Account
This step has no content
Go to action: Savings Account A...
4 2 is Current Account
This step has no content
Go to action: Current Account A...
5 2 is Loan Account
This step has no content
Go to action: Loan Account Action
6 2 is General Query
This step has no content
New step
Step 3 is taken
with conditions
Conditions
1 condition
If All of this is true:
2. What type of service are you loo...
is
Savings Account
and Add condition +
New condition group +
Assistant says
For example: Please select from the following options:
Define customer response
And then
Go to another action
Goes to action
Savings Account Action
Pass values
Upon return
Continue
Preview

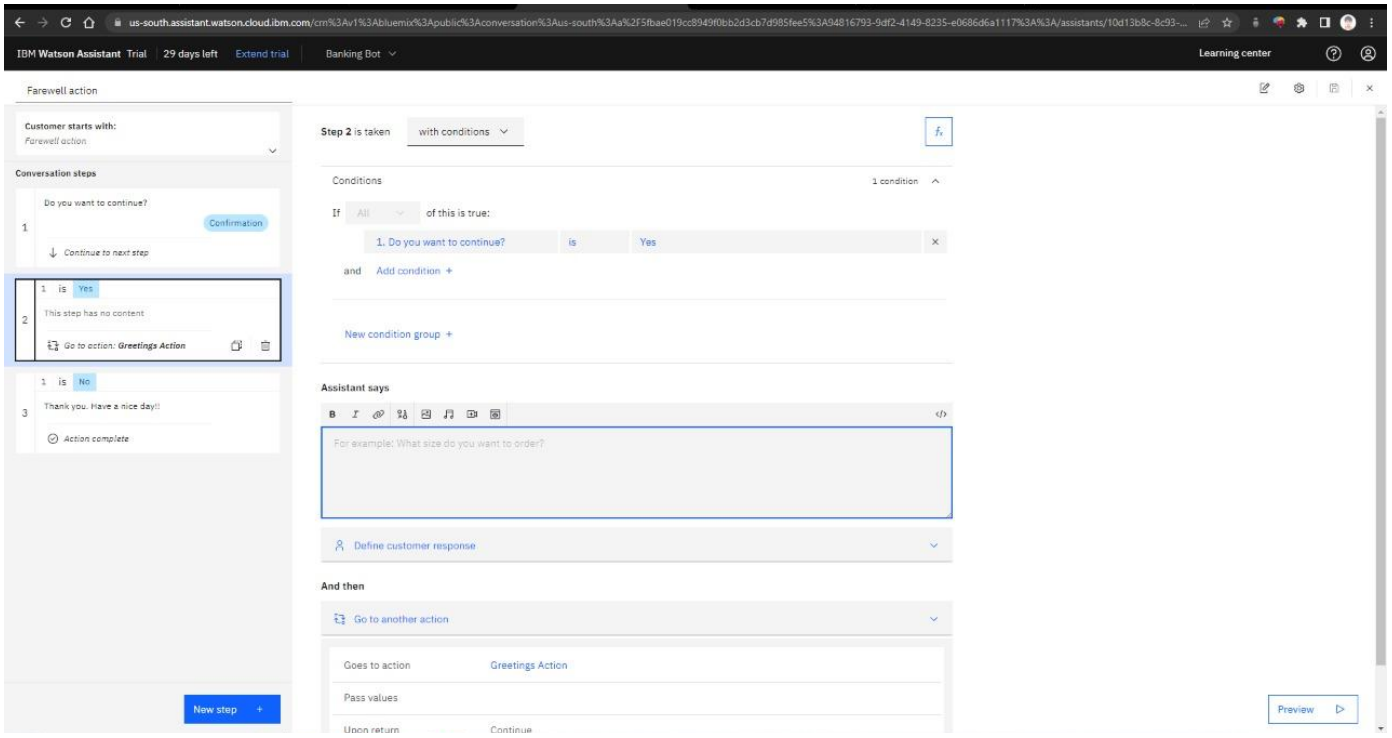

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/assistants/10d13b8c-8c93-...
IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Greetings Action
1 Welcome to IDEAL bank !!
Continue to next step
2 What type of service are you looking for?
Savings Acco...
Current Acco...
+ 3
Continue to next step
3 2 is Savings Account
This step has no content
Go to action: Savings Account A...
4 2 is Current Account
This step has no content
Go to action: Current Account A...
5 2 is Loan Account
This step has no content
Go to action: Loan Account Action
6 2 is General Query
This step has no content
Go to action: General Query Acti...
7 2 is Net Banking
This step has no content
New step
Step 4 is taken
with conditions
Conditions
1 condition
If All of this is true:
2. What type of service are you loo...
is
Current Account
and Add condition +
New condition group +
Assistant says
For example: What size do you want to order?
Define customer response
And then
Go to another action
Goes to action
Current Account Action
Pass values
Upon return
Continue
Preview

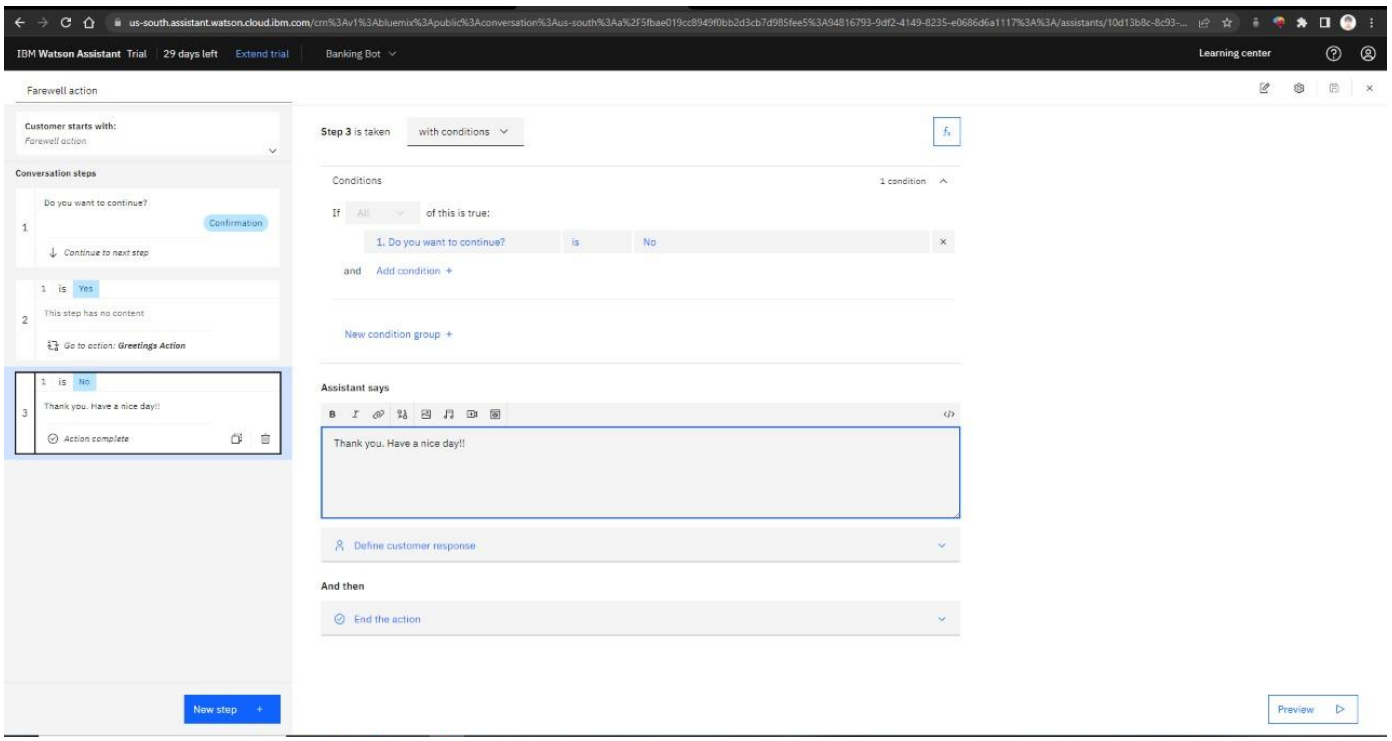

us-south.assistant.watson.cloud.ibm.com/cm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/assistants/10d13b8c-8c93-...
IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Greetings Action
What type of service are you looking for?
Savings Acco...
Current Acco...
+ 3
Continue to next step
2 is Savings Account
This step has no content
Go to action: Savings Account A...
2 is Current Account
This step has no content
Go to action: Current Account A...
2 is Loan Account
This step has no content
Go to action: Loan Account Action
2 is General Query
This step has no content
Go to action: General Query Acti...
2 is Net Banking
This step has no content
Go to action: Net Banking Action
New step
Step 5 is taken
with conditions
Conditions
1 condition
If All of this is true:
2. What type of service are you loo...
is
Loan Account
and
Add condition +
New condition group +
Assistant says
For example: What size do you want to order?
Define customer response
And then
Go to another action
Goes to action
Loan Account Action
Pass values
Upon return
Continue
Preview

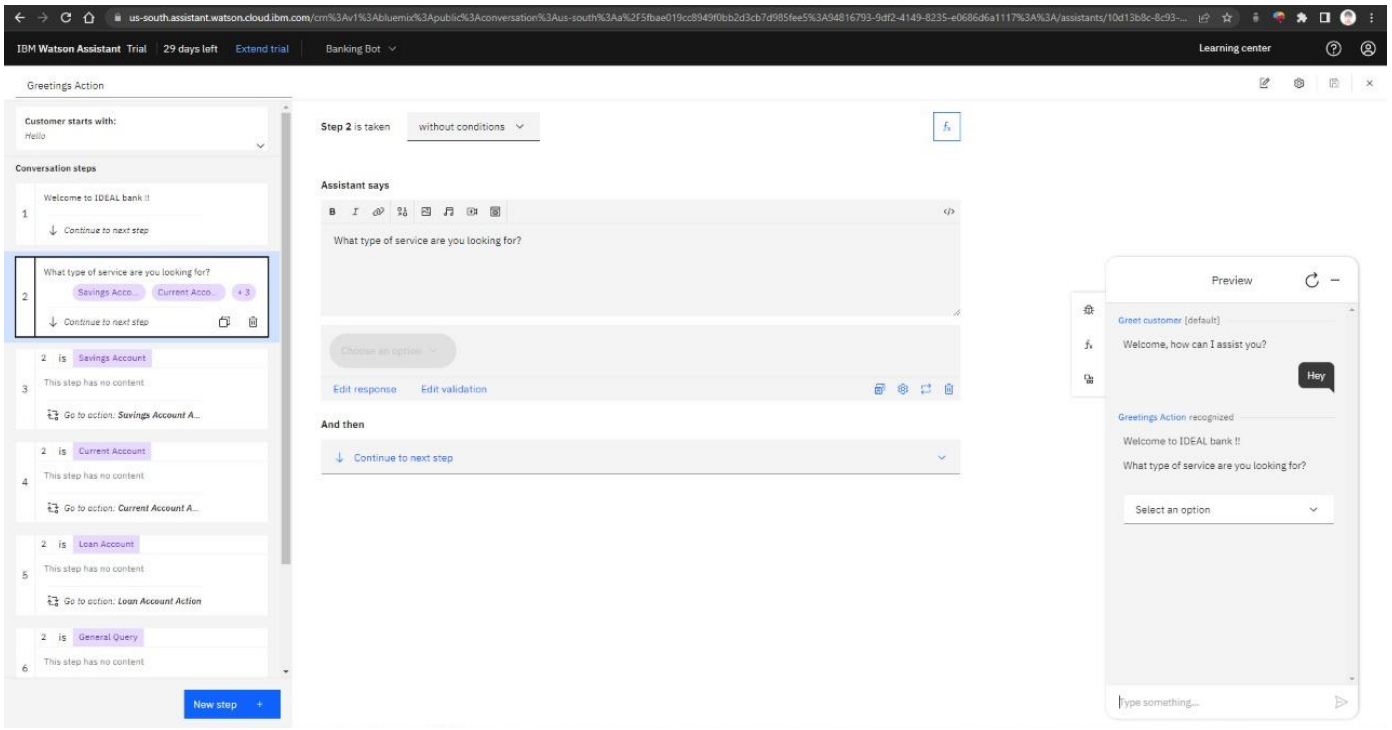

us-south.assistant.watson.cloud.ibm.com/cm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/assistants/10d13b8c-8c93-...
IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Greetings Action
What type of service are you looking for?
Savings Acco...
Current Acco...
+ 3
Continue to next step
2 is Savings Account
This step has no content
Go to action: Savings Account A...
2 is Current Account
This step has no content
Go to action: Current Account A...
2 is Loan Account
This step has no content
Go to action: Loan Account Action
2 is General Query
This step has no content
Go to action: General Query Acti...
2 is Net Banking
This step has no content
Go to action: Net Banking Action
New step
Step 6 is taken
with conditions
Conditions
1 condition
If All of this is true:
2. What type of service are you loo...
is
General Query
and
Add condition +
New condition group +
Assistant says
For example: What type of transfer would you like to make?
Define customer response
And then
Go to another action
Goes to action
General Query Action
Pass values
Upon return
Continue
Preview


IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Greetings Action
What type of service are you looking for?
Savings Acco...
Current Acco...
+ 3
Continue to next step
2 is Savings Account
This step has no content
Go to action: Savings Account A...
2 is Current Account
This step has no content
Go to action: Current Account A...
2 is Loan Account
This step has no content
Go to action: Loan Account Action
2 is General Query
This step has no content
Go to action: General Query Acti...
2 is Net Banking
This step has no content
Go to action: Net Banking Action
New step
Step 7 is taken
with conditions
Conditions
1 condition
If All of this is true:
2. What type of service are you loo...
is
Net Banking
and
Add condition +
New condition group +
Assistant says
For example: Please select from the following options:
Define customer response
And then
Go to another action
Goes to action
Net Banking Action
Pass values
Upon return
Continue
Preview

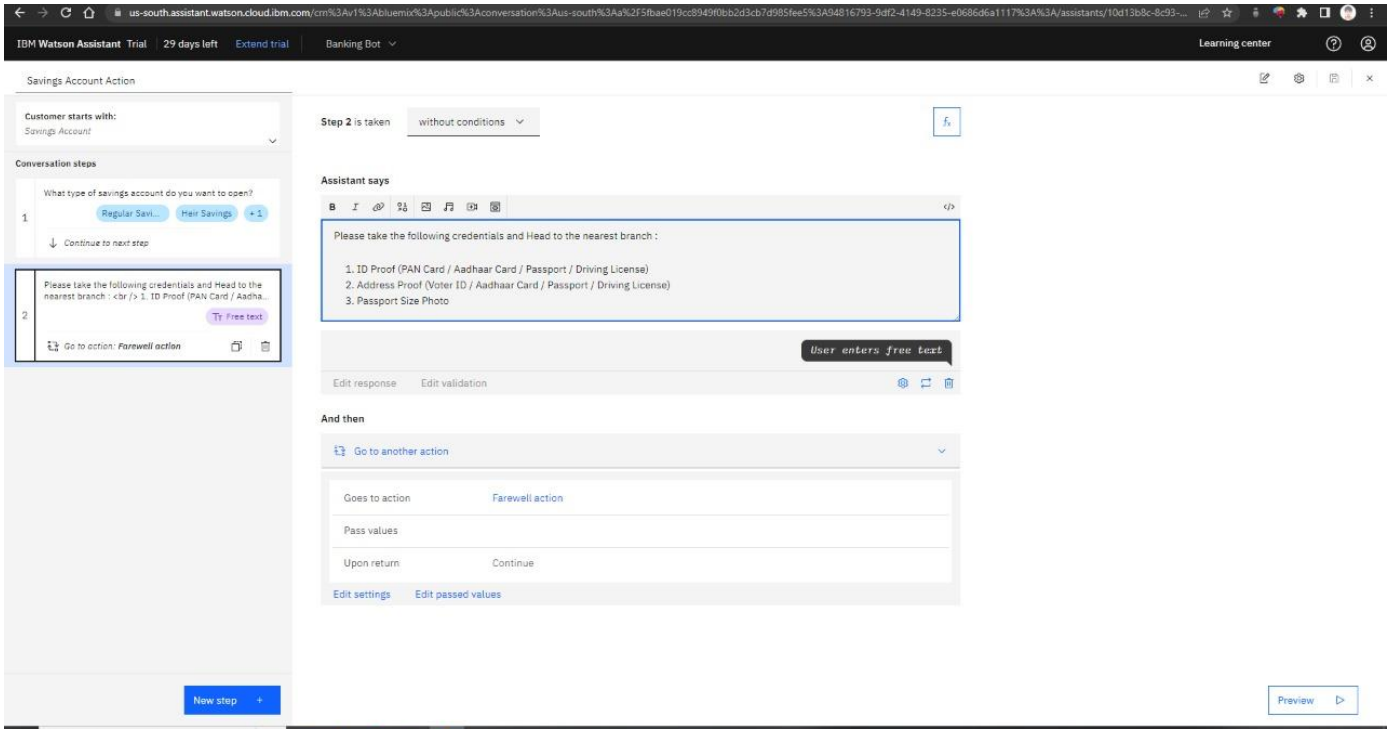

IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Farewell action
Customer starts with:
Farewell action
Conversation steps
Do you want to continue?
Confirmation
Continue to next step
1 is Yes
This step has no content
Go to action: Greetings Action
1 is No
Thank you. Have a nice day!
Action complete
New step
Step 1 is taken
without conditions
Assistant says
Do you want to continue?
Yes
No
View response
Edit validation
And then
Continue to next step
Preview

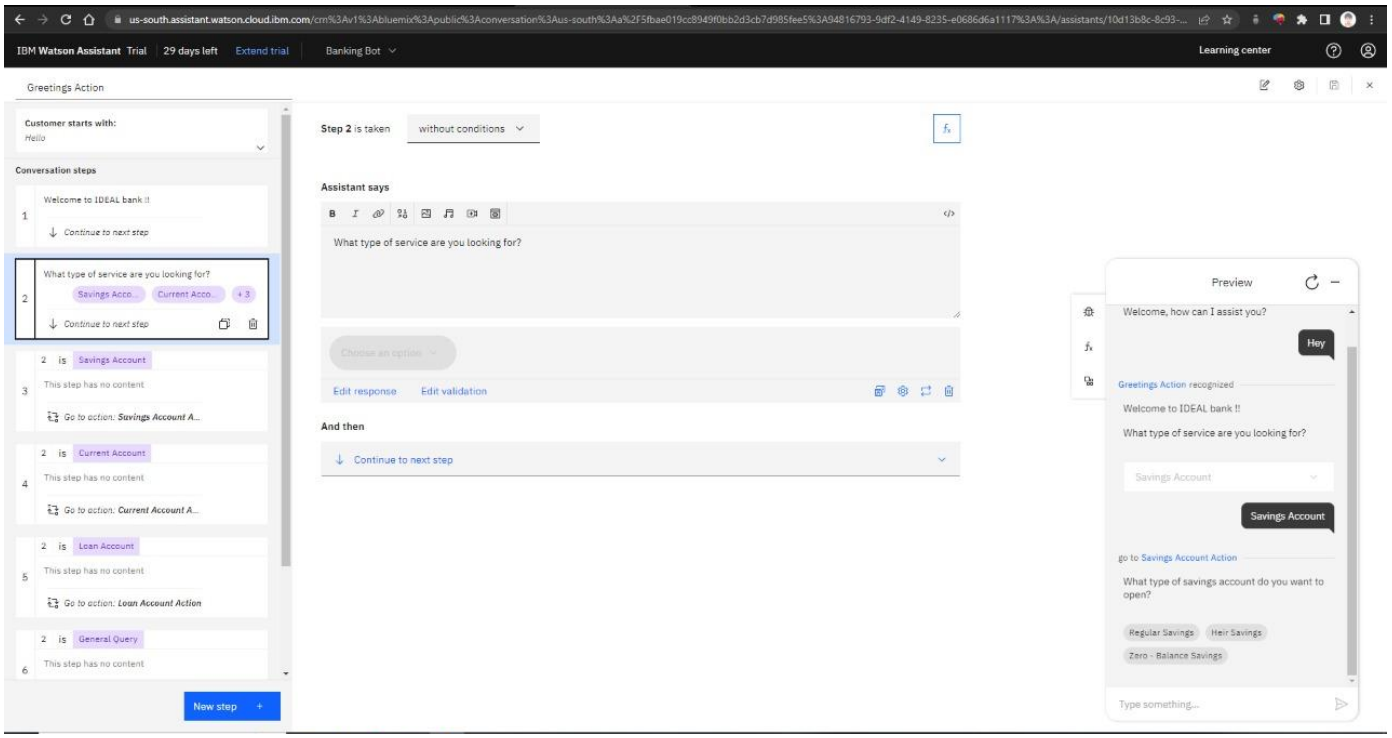

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/assistants/10d13b8c-8c93-...
IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Farewell action
Customer starts with:
Farewell action
Conversation steps
1
Do you want to continue?
Confirmation
Continue to next step
2
1 is Yes
This step has no content
Go to action: Greetings Action
3
1 is No
Thank you. Have a nice day!!
Action complete
New step
Step 2 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Do you want to continue?
is
Yes
and
Add condition
New condition group
Assistant says
For example: What size do you want to order?
Define customer response
And then
Go to another action
Goes to action
Greetings Action
Pass values
Upon return
Continue
Preview

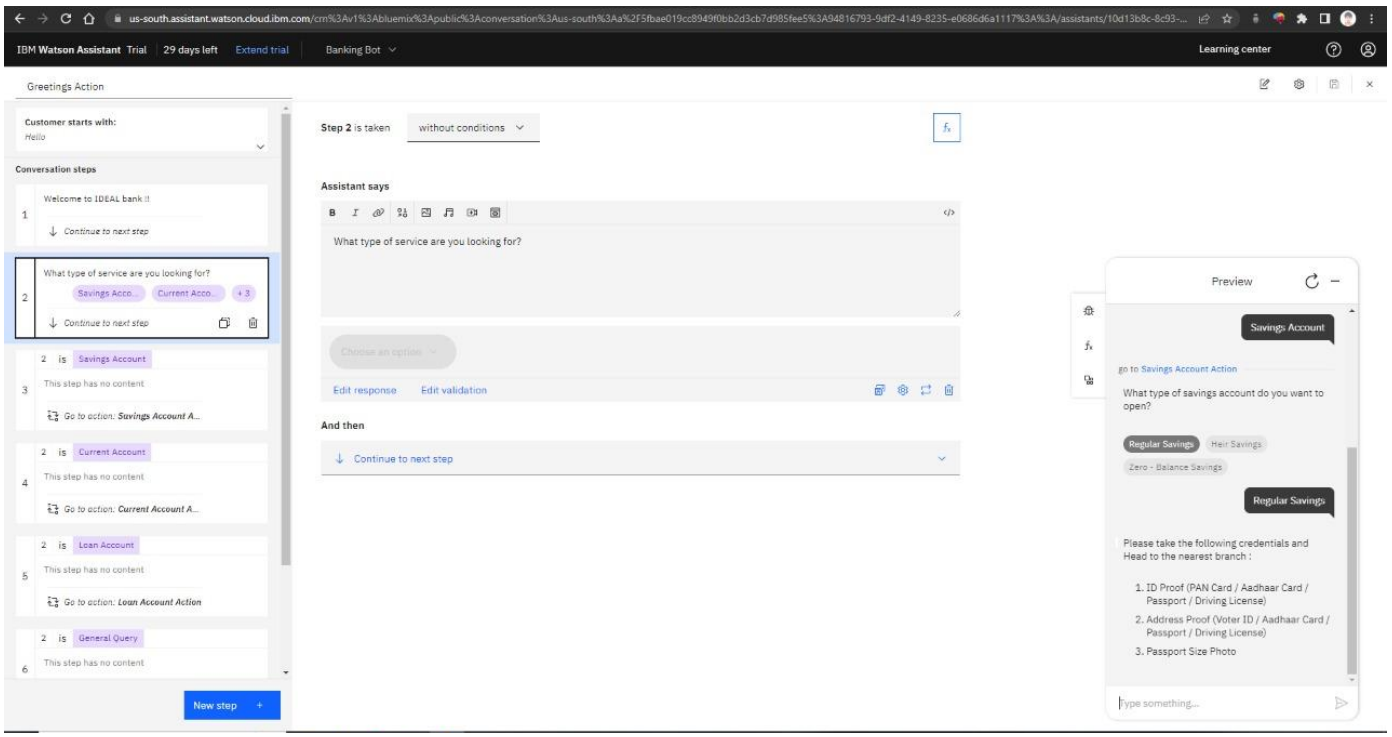

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/assistants/10d13b8c-8c93-...
IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Farewell action
Customer starts with:
Farewell action
Conversation steps
1
Do you want to continue?
Confirmation
Continue to next step
2
1 is Yes
This step has no content
Go to action: Greetings Action
3
1 is No
Thank you. Have a nice day!!
Action complete
New step
Step 3 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Do you want to continue?
is
No
and
Add condition
New condition group
Assistant says
Thank you. Have a nice day!!
Define customer response
And then
End the action
Preview

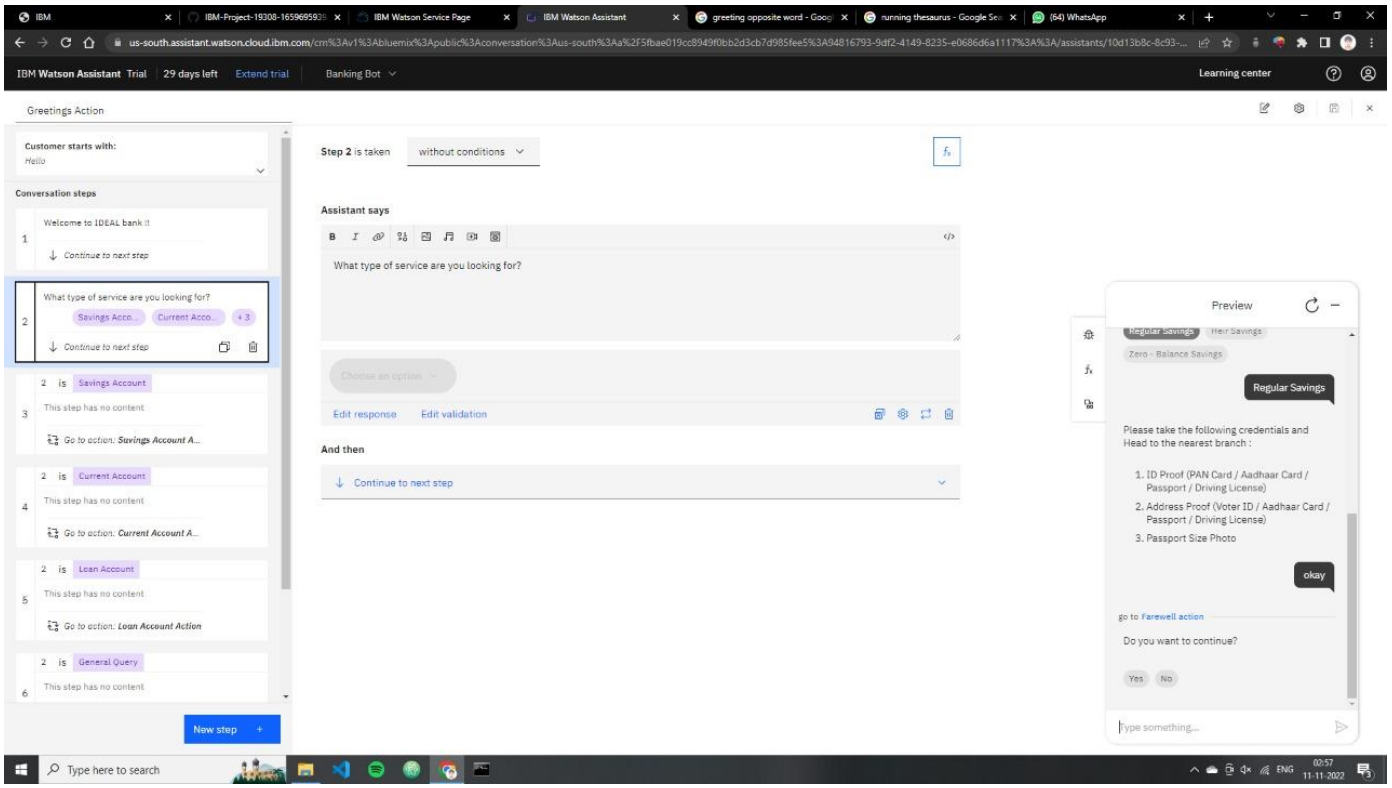


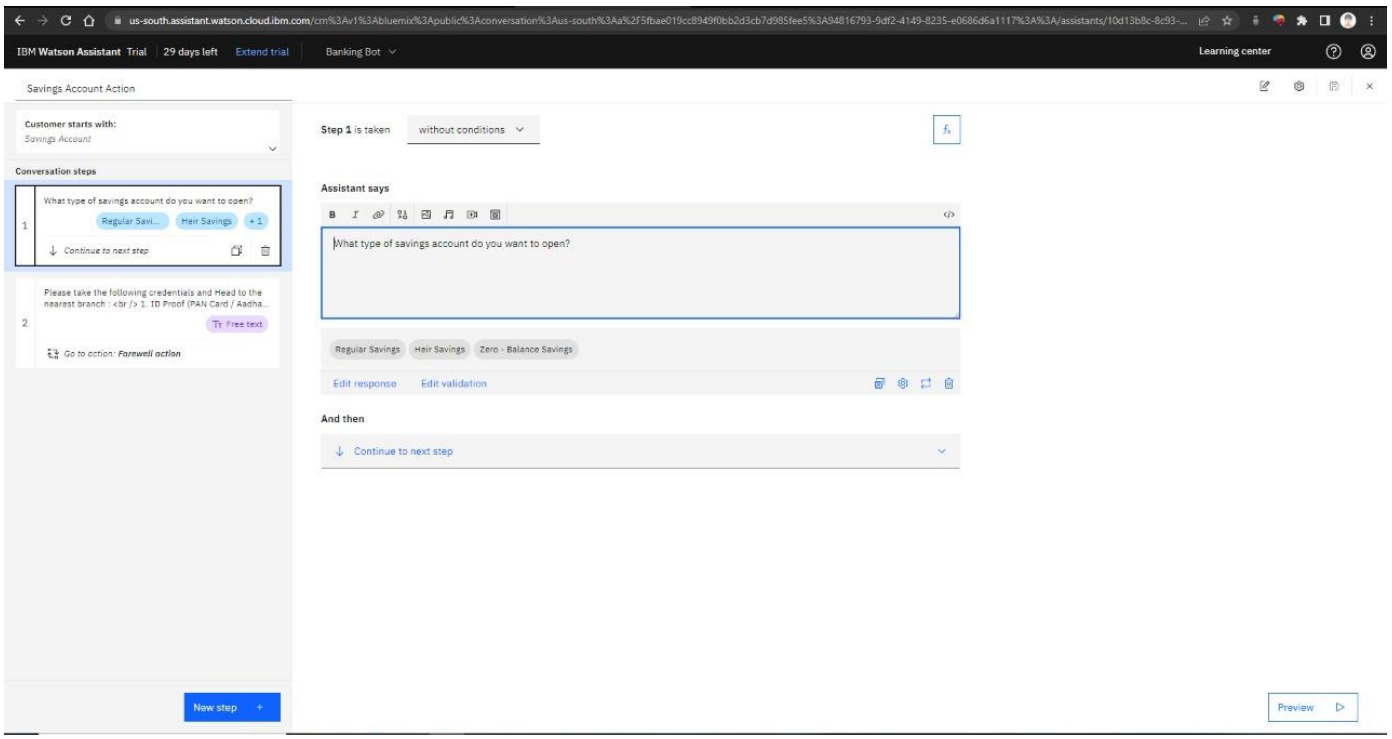
Create Savings Account Action :



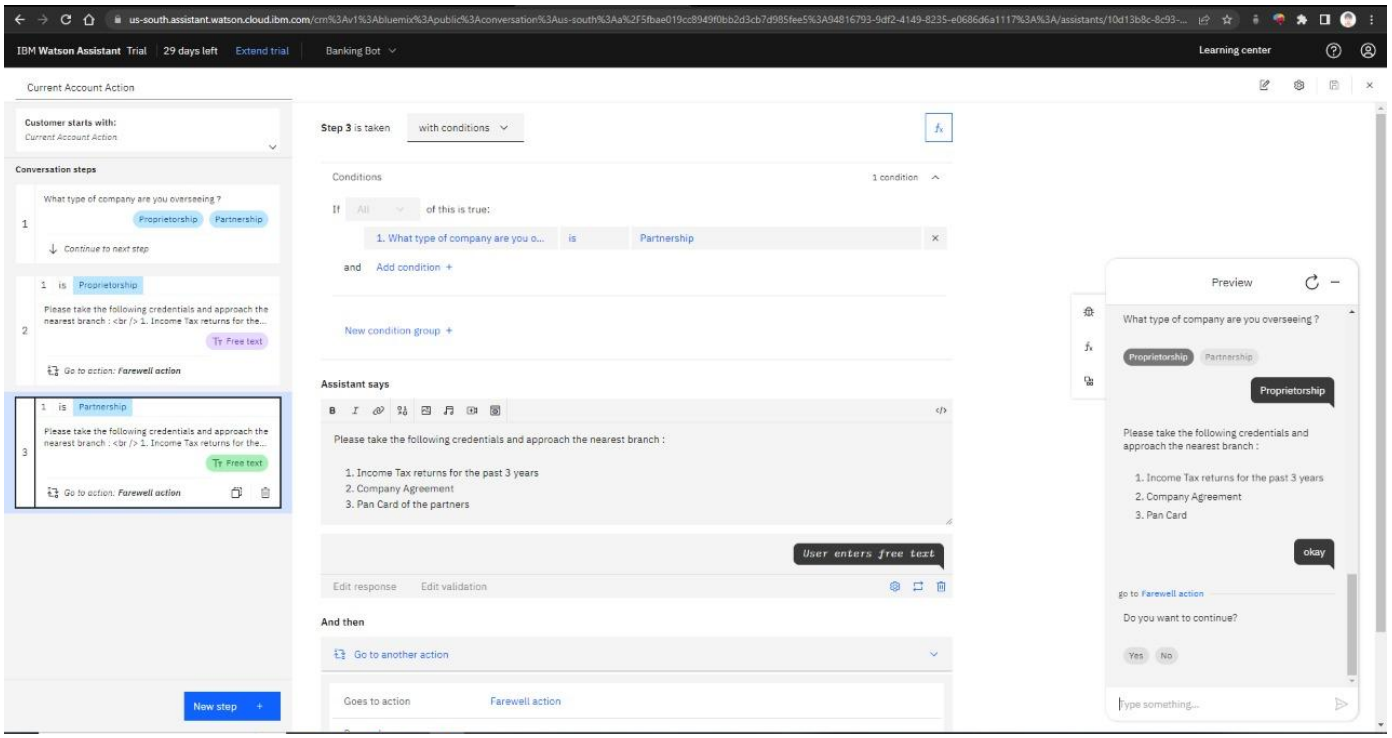

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/assistants/10d13b8c-8c93-...
IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Greetings Action
Customer starts with:
Hello
Conversation steps
1 Welcome to IDEAL bank !!
Continue to next step
2 What type of service are you looking for?
Savings Acco...
Current Acco...
+ 3
Continue to next step
3 2 is Savings Account
This step has no content
Go to action: Savings Account A...
4 2 is Current Account
This step has no content
Go to action: Current Account A...
5 2 is Loan Account
This step has no content
Go to action: Loan Account Action
6 2 is General Query
This step has no content
New step
Step 2 is taken
without conditions
Assistant says
What type of service are you looking for?
Choose an option
Edit response
Edit validation
And then
Continue to next step
Preview
Welcome, how can I assist you?
Hey
Greetings Action recognized
Welcome to IDEAL bank !!
What type of service are you looking for?
Savings Account
Savings Account
go to Savings Account Action
What type of savings account do you want to open?
Regular Savings
Heir Savings
Zero - Balance Savings
Type something...

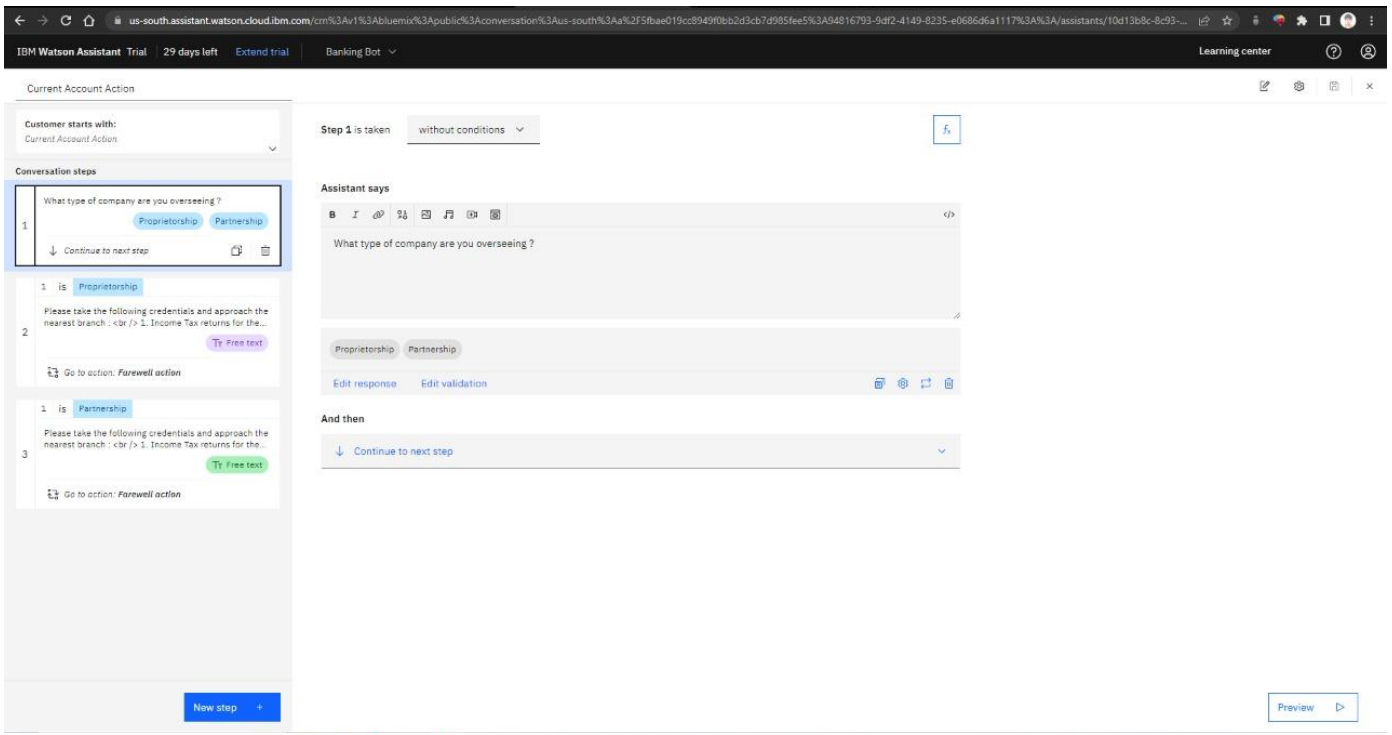

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F5fbae019cc8949f0bb2d3cb7d985fee5%3A94816793-9df2-4149-8235-e0686d6a1117%3A%3A/assistants/10d13b8c-8c93-...
IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Greetings Action
Customer starts with:
Hello
Conversation steps
1 Welcome to IDEAL bank !!
Continue to next step
2 What type of service are you looking for?
Savings Acco...
Current Acco...
+ 3
Continue to next step
3 2 is Savings Account
This step has no content
Go to action: Savings Account A...
4 2 is Current Account
This step has no content
Go to action: Current Account A...
5 2 is Loan Account
This step has no content
Go to action: Loan Account Action
6 2 is General Query
This step has no content
New step
Step 2 is taken
without conditions
Assistant says
What type of service are you looking for?
Choose an option
Edit response
Edit validation
And then
Continue to next step
Preview
Savings Account
go to Savings Account Action
What type of savings account do you want to open?
Regular Savings
Heir Savings
Zero - Balance Savings
Regular Savings
Please take the following credentials and Head to the nearest branch :
1. ID Proof (PAN Card / Aadhaar Card / Passport / Driving License)
2. Address Proof (Voter ID / Aadhaar Card / Passport / Driving License)
3. Passport Size Photo
Type something...

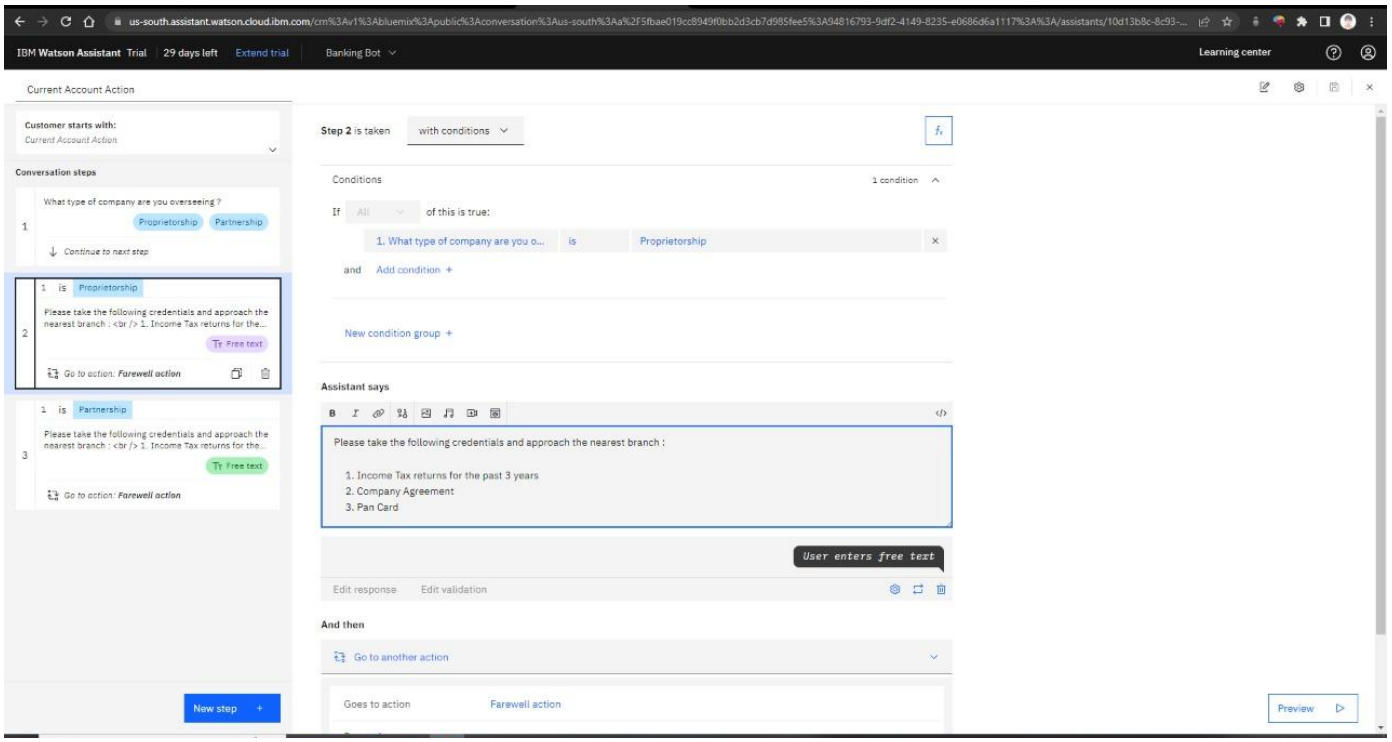


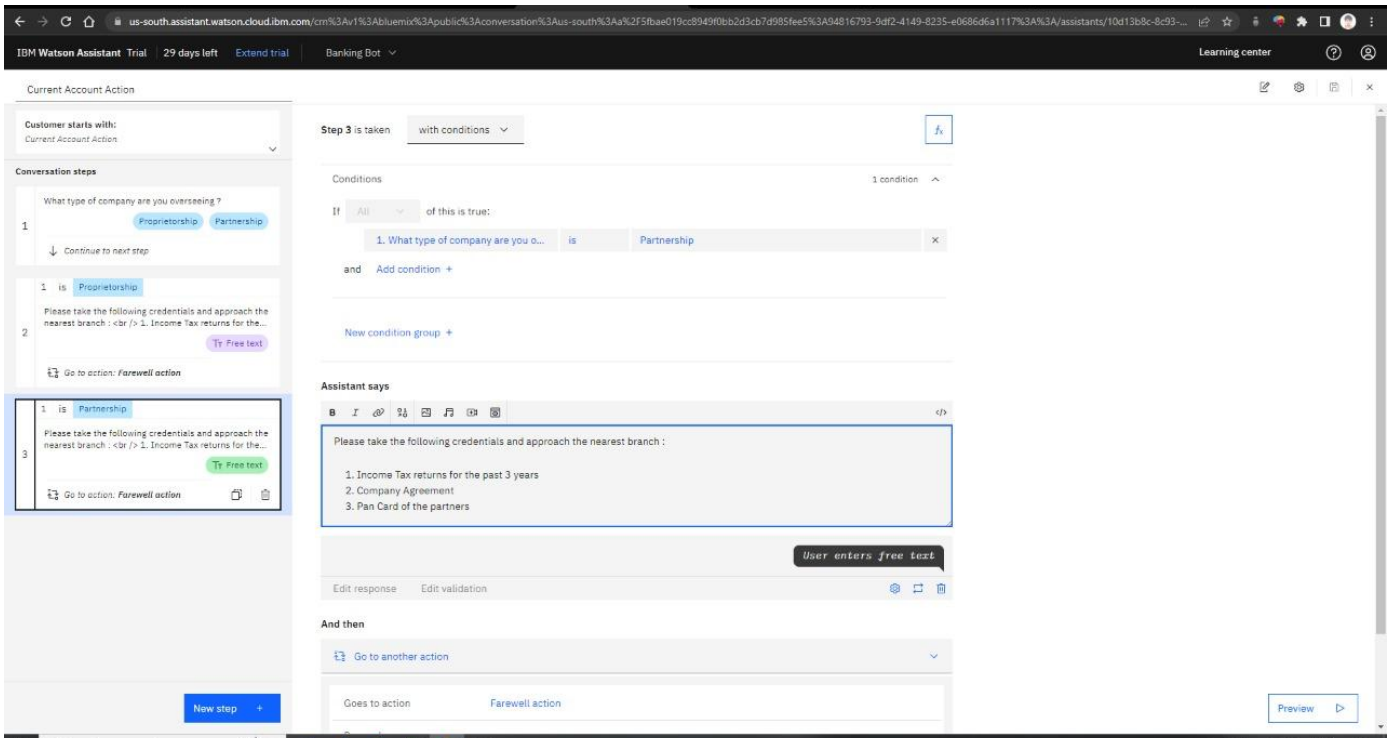


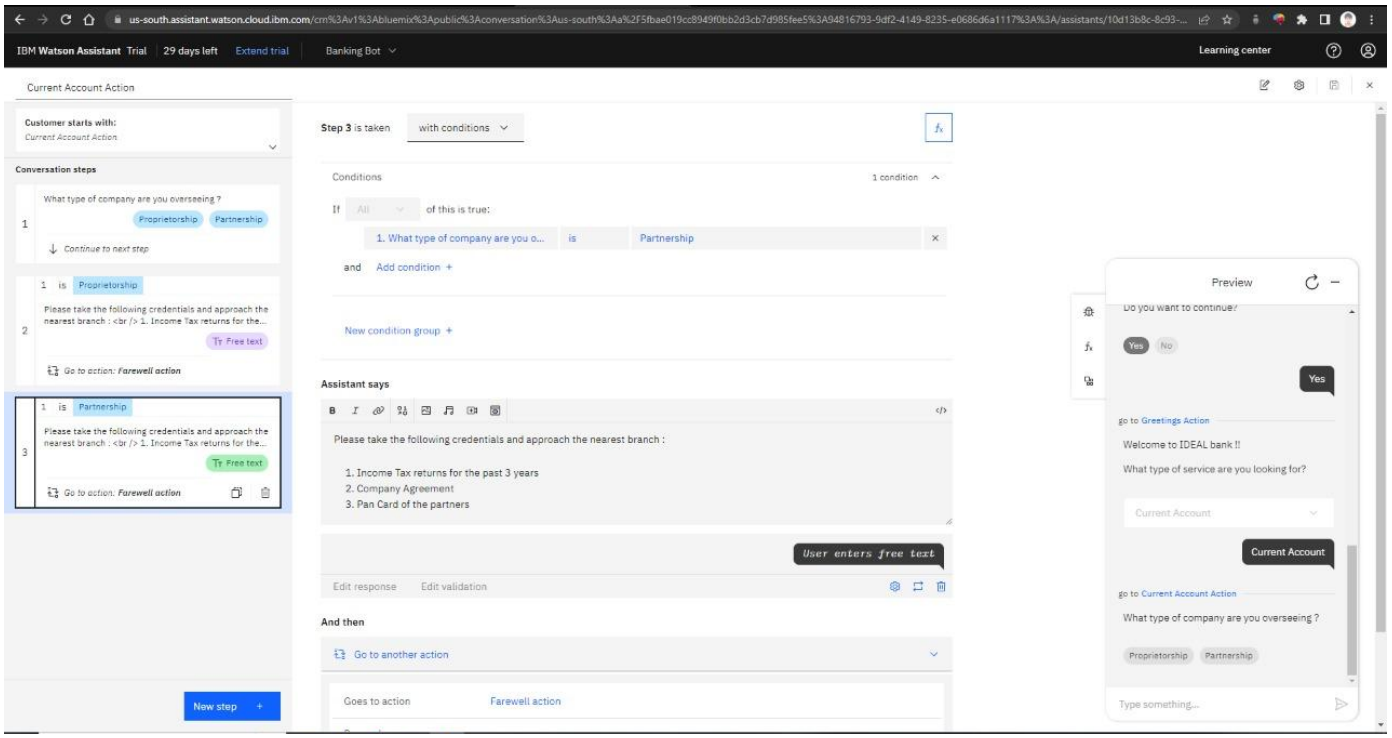
Creating Current Account Action :

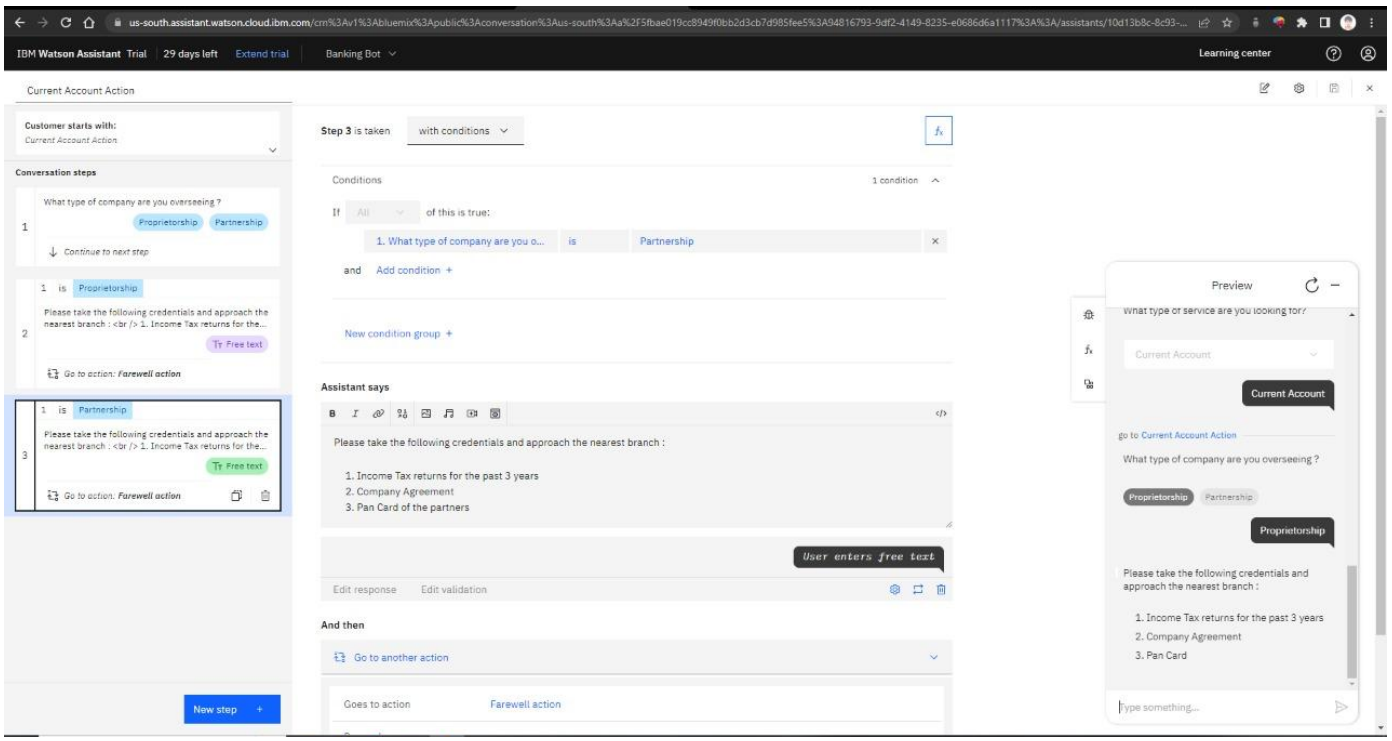

IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Current Account Action
Customer starts with:
Current Account Action
Conversation steps
What type of company are you overseeing ?
Proprietorship
Partnership
Continue to next step
Please take the following credentials and approach the nearest branch :
 1. Income Tax returns for the...
Free text
Go to action: Farewell action
New step
Step 3 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. What type of company are you o...
is
Partnership
and
Add condition +
New condition group +
Assistant says
Please take the following credentials and approach the nearest branch :
1. Income Tax returns for the past 3 years
2. Company Agreement
3. Pan Card of the partners
User enters free text
Edit response
Edit validation
And then
Go to another action
Goes to action
Farewell action
Preview
What type of company are you overseeing ?
Proprietorship
Partnership
Please take the following credentials and approach the nearest branch :
1. Income Tax returns for the past 3 years
2. Company Agreement
3. Pan Card
okay
go to Farewell action
Do you want to continue?
Yes
No
Type something...


IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Current Account Action
Customer starts with:
Current Account Action
Conversation steps
What type of company are you overseeing ?
Proprietorship
Partnership
Continue to next step
Please take the following credentials and approach the nearest branch :
 1. Income Tax returns for the...
Free text
Go to action: Farewell action
New step
Step 1 is taken
without conditions
Assistant says
What type of company are you overseeing ?
Proprietorship
Partnership
Edit response
Edit validation
And then
Continue to next step
Preview


us-south.assistant.watson.cloud.ibm.com
IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Current Account Action
Customer starts with:
Current Account Action
Conversation steps
What type of company are you overseeing ?
Proprietorship
Partnership
Continue to next step
1 is Proprietorship
Please take the following credentials and approach the nearest branch :
 1. Income Tax returns for the...
Try Free text
Go to action: Farewell action
1 is Partnership
Please take the following credentials and approach the nearest branch :
 1. Income Tax returns for the...
Try Free text
Go to action: Farewell action
New step
Step 2 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. What type of company are you o...
is
Proprietorship
and
Add condition +
New condition group +
Assistant says
Please take the following credentials and approach the nearest branch :
1. Income Tax returns for the past 3 years
2. Company Agreement
3. Pan Card
User enters free text
Edit response
Edit validation
And then
Go to another action
Goes to action
Farewell action
Preview


us-south.assistant.watson.cloud.ibm.com
IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Current Account Action
Customer starts with:
Current Account Action
Conversation steps
What type of company are you overseeing ?
Proprietorship
Partnership
Continue to next step
1 is Proprietorship
Please take the following credentials and approach the nearest branch :
 1. Income Tax returns for the...
Try Free text
Go to action: Farewell action
1 is Partnership
Please take the following credentials and approach the nearest branch :
 1. Income Tax returns for the...
Try Free text
Go to action: Farewell action
New step
Step 3 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. What type of company are you o...
is
Partnership
and
Add condition +
New condition group +
Assistant says
Please take the following credentials and approach the nearest branch :
1. Income Tax returns for the past 3 years
2. Company Agreement
3. Pan Card of the partners
User enters free text
Edit response
Edit validation
And then
Go to another action
Goes to action
Farewell action
Preview


IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Current Account Action
Customer starts with:
Current Account Action
Conversation steps
What type of company are you overseeing ?
Proprietorship
Partnership
Continue to next step
Please take the following credentials and approach the nearest branch :
 1. Income Tax returns for the...
Free text
Go to action: Farewell action
Step 3 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. What type of company are you o...
is
Partnership
and
Add condition +
New condition group +
Assistant says
Please take the following credentials and approach the nearest branch :
1. Income Tax returns for the past 3 years
2. Company Agreement
3. Pan Card of the partners
User enters free text
Edit response
Edit validation
And then
Go to another action
Goes to action
Farewell action
New step
Preview
Do you want to continue?
Yes
No
Yes
go to Greetings Action
Welcome to IDEAL bank !!
What type of service are you looking for?
Current Account
Current Account
go to Current Account Action
What type of company are you overseeing ?
Proprietorship
Partnership
Type something...


IBM Watson Assistant Trial
29 days left
Extend trial
Banking Bot
Learning center
Current Account Action
Customer starts with:
Current Account Action
Conversation steps
What type of company are you overseeing ?
Proprietorship
Partnership
Continue to next step
Please take the following credentials and approach the nearest branch :
 1. Income Tax returns for the...
Free text
Go to action: Farewell action
Step 3 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. What type of company are you o...
is
Partnership
and
Add condition +
New condition group +
Assistant says
Please take the following credentials and approach the nearest branch :
1. Income Tax returns for the past 3 years
2. Company Agreement
3. Pan Card of the partners
User enters free text
Edit response
Edit validation
And then
Go to another action
Goes to action
Farewell action
New step
Preview
What type of service are you looking for?
Current Account
Current Account
go to Current Account Action
What type of company are you overseeing ?
Proprietorship
Partnership
Proprietorship
Please take the following credentials and approach the nearest branch :
1. Income Tax returns for the past 3 years
2. Company Agreement
3. Pan Card
Type something...