

Project Development Phase Delivery of Sprint-1

DATE	29.10.2022
TEAM ID	PNT2022TMID53377
PROJECT NAME	AI based discourse for Banking Industry

Create IBM Service:

1. Create IBM Watson Assistant Service

The screenshot displays the IBM Watson Assistant web interface. The top navigation bar includes 'IBM Watson Assistant', 'Lite', 'Upgrade', and 'Banking Bot'. The main content area is divided into two sections: 'Assistant settings' and 'Home'.

Assistant settings

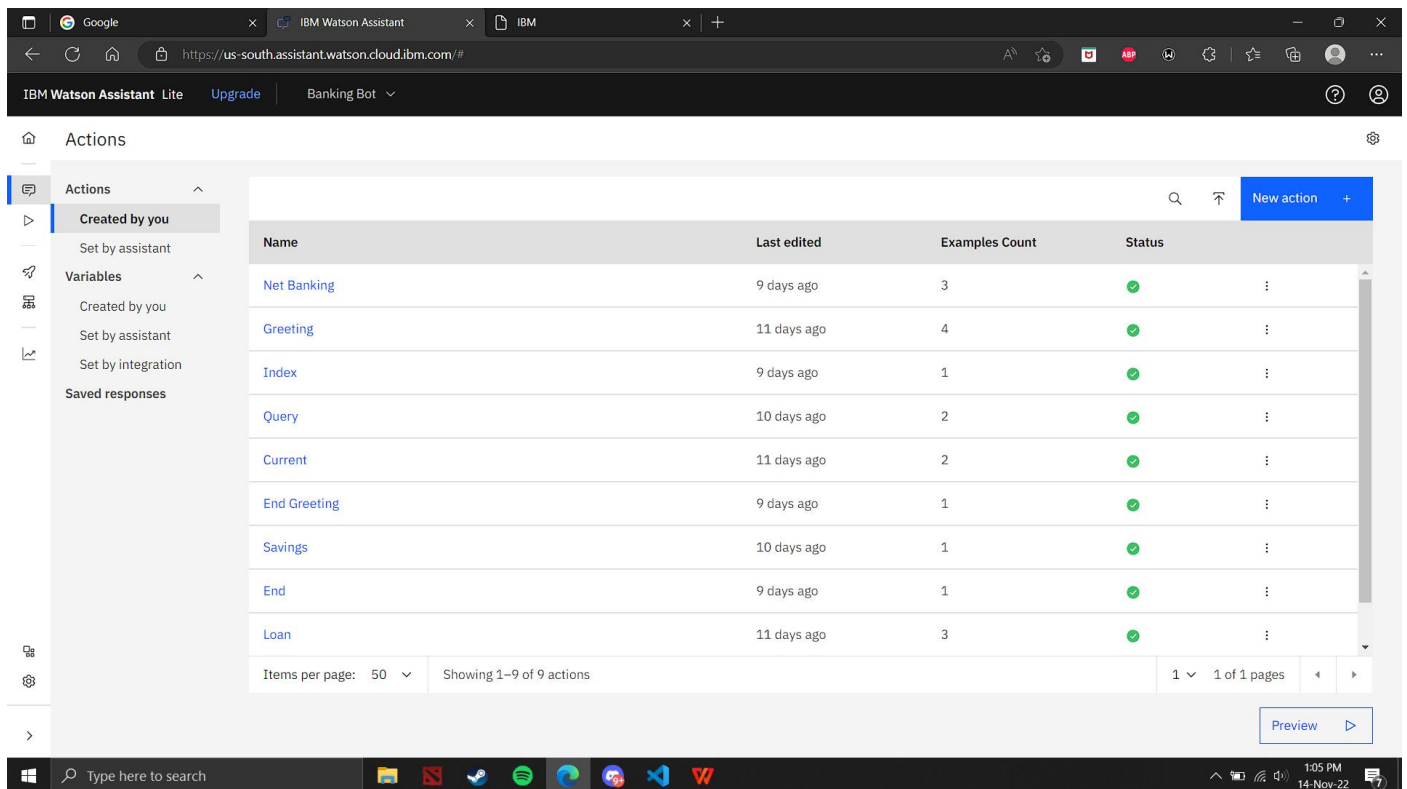
- Details**
 - Assistant ID: 15b6c890-c698-446e-88d1-3dd7d418ac62
 - Assistant name: Banking Bot
 - Description (optional): 0/128
 - Assistant language: English (US)
 - Buttons: Cancel, Saved
- Dialog**
 - Dialog offers a set of full-feature editors that you use to define both your training data and the conversation, with control over the logic flow.

Home

- Welcome, you're in the new Watson Assistant! (Learn more)
- Banking Bot | English (US)**
 - No description
 - Get started**
 - 0 steps left 0 min
 - 100% progress bar
 - 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**
 - 1 step left 5 min
 - 66% progress bar
 - Create your first action (5 min)

Creating Skills & Assistant For Chatbot:

1. Chatbot Skills Creation



IBM Watson Assistant Lite Upgrade Banking Bot

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

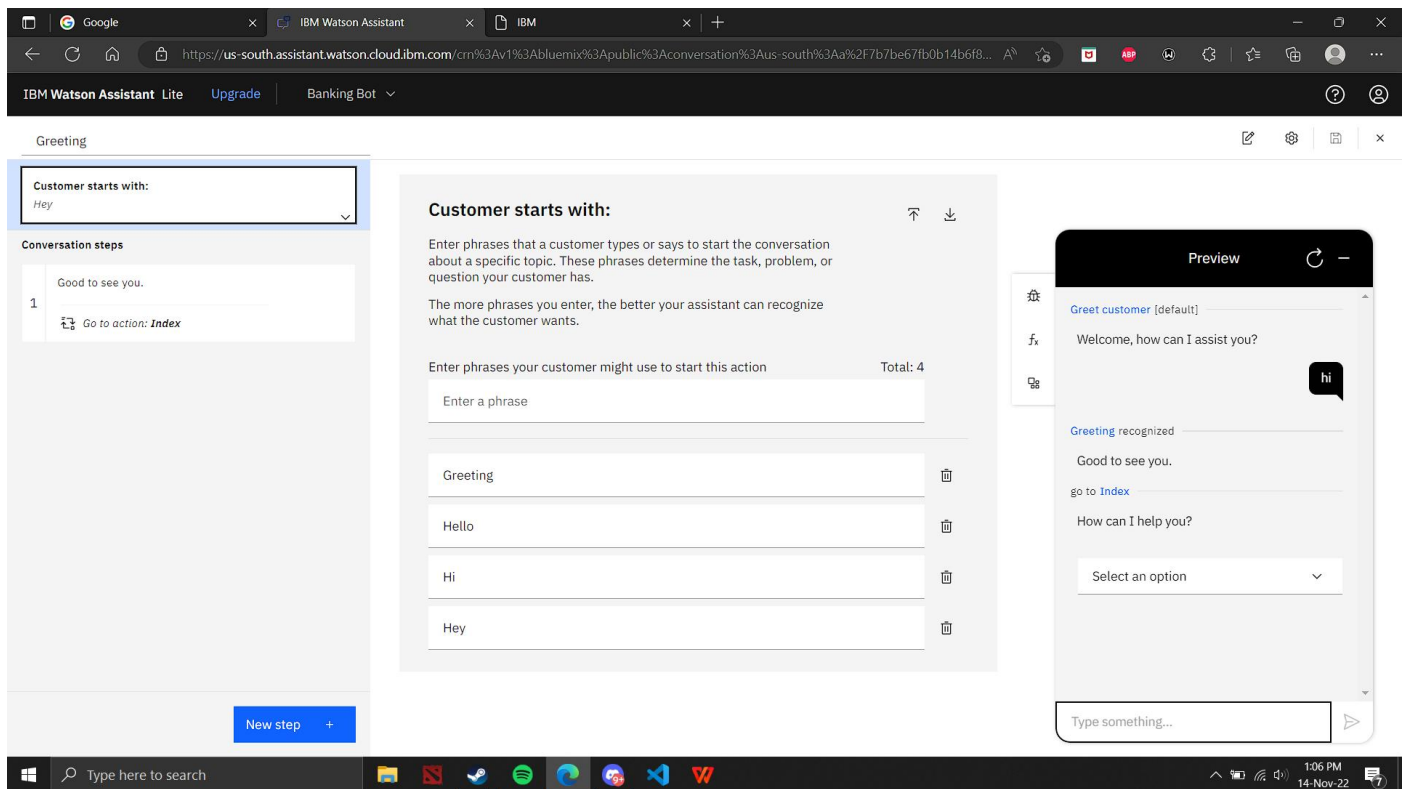
Saved responses

Name	Last edited	Examples Count	Status
Net Banking	9 days ago	3	✓
Greeting	11 days ago	4	✓
Index	9 days ago	1	✓
Query	10 days ago	2	✓
Current	11 days ago	2	✓
End Greeting	9 days ago	1	✓
Savings	10 days ago	1	✓
End	9 days ago	1	✓
Loan	11 days ago	3	✓

Items per page: 50 Showing 1–9 of 9 actions

1 1 of 1 pages

Preview



Greeting

Customer starts with:

Hey

Conversation steps

1 Good to see you.

Go to action: Index

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 action Total: 4

Enter a phrase

Greeting

Hello

Hi

Hey

Preview

Greet customer [default]

Welcome, how can I assist you?

hi

Greeting recognized

Good to see you.

go to Index

How can I help you?

Select an option

Type something...

Greeting

The screenshot shows the IBM Watson Assistant interface for a conversation flow named 'Index'. The left sidebar displays the 'Conversation steps' for 'Index', which includes a greeting step followed by four steps based on user input: 'Savings account', 'Current Account', 'Loan Query', and 'General Query'. The main workspace shows 'Step 1 is taken' with the condition 'without conditions'. The 'Assistant says' section contains the text 'How can I help you?' and a 'Choose an option' button. Below this, there are 'Edit response' and 'Edit validation' links. The 'And then' section shows a 'Continue to next step' action. On the right, a 'Preview' window shows a simulated conversation where a greeting is recognized, and the user is presented with a list of options: 'Savings account', 'Current Account', 'Loan Query', 'General Query', and 'Net Banking'.

Index

2. Creating Saving Account Action

The screenshot shows the IBM Watson Assistant interface for a conversation flow named 'Savings'. The left sidebar displays the 'Conversation steps' for 'Savings', which includes a question about the type of savings account, followed by steps for 'Regular Savings Account' and 'Kids Savings Account'. The main workspace shows 'Step 3 is taken' with the condition 'with conditions'. The 'Conditions' section shows a condition 'If All of this is true: 1. Which type of sav... is Kids Savings Account'. The 'Assistant says' section contains the text 'Please take these documents and head over to the nearest branch:' followed by a list of documents: '1. Aadhar Card', '2. Pan Card', '3. Passport Size photos', and '4. Guardian's Aadhar Card'. On the right, a 'Preview' window shows a simulated conversation where the user selects 'Kids Savings Account', and the assistant provides a list of documents to take to the nearest branch.

Savings Account - Kids Savings Account

Savings

Conversation steps

- Which type of savings account you want to create?
 - Zero Balance... Kids Savings ... + 1
 - Continue to next step
- 1 is Regular Savings Account
 - Take the following documents and head over to your nearest branch: 1. Aadhar Card 2. Pan Card 3....
 - Go to action: End
- 1 is Kids Savings Account
 - Please take these documents and head over to the nearest branch:
 - Go to action: End
- 1 is Zero Balance Savings Account
 - Take the following documents and head over to your nearest branch: 1. Aadhar Card 2. Pan Card 3....
 - Go to action: End

Step 4 is taken with conditions

Conditions

If All of this is true:

- 1. Which type of sav... is Zero Balance Savings Account

and Add condition +

New condition group +

Assistant says

Take the following documents and head over to your nearest branch:

- Aadhar Card
- Pan Card
- Passport size photos

Define customer response

Preview

Regular Savings Account

Kids Savings Account

Zero Balance Savings Account

Zero Balance Savings Account

Take the following documents and head over to your nearest branch:

- Aadhar Card
- Pan Card
- Passport size photos

go to End

Do you want to know other services?

Yes No

Type something...

Savings Account - Zero Balance savings account

3. Creating Current Account Action

Current

Customer starts with: Current Account

Conversation steps

- What's your company type?
 - Partnership Proprietorship
 - Continue to next step
- 1 is Partnership
 - Please take the following documents and approach the closest bank branch
 - Go to action: End
- 1 is Proprietorship
 - Please take the following documents and approach the closest bank branch
 - Go to action: End

Step 1 is taken without conditions

Assistant says

What's your company type?

Partnership Proprietorship

Edit response Edit validation

And then

Continue to next step

Preview

Yes No

Yes

go to Index

How can I help you?

Current Account

Current Account

go to Current

What's your company type?

Partnership Proprietorship

Type something...

Current Account

IBM Watson Assistant Lite Upgrade Banking Bot

Current

Customer starts with: Current Account

Conversation steps

1 What's your company type? Partnership Proprietorship

↓ Continue to next step

1 is Partnership

2 Please take the following documents and approach the closest bank branch

Go to action: End

1 is Proprietorship

3 Please take the following documents and approach the closest bank branch

Go to action: End

New step +

Step 2 is taken with conditions

Conditions 1 condition

If All of this is true:

1. What's your comp... is Partnership

and Add condition +

New condition group +

Assistant says

Please take the following documents and approach the closest bank branch

1. Income tax returns of the proprietor for last 3 years

2. Company Agreement

3. Pan Card of both partners

Define customer response

Preview

Partnership Proprietorship

Partnership

Please take the following documents and approach the closest bank branch

1. Income tax returns of the proprietor for last 3 years

2. Company Agreement

3. Pan Card of both partners

go to End

Do you want to know other services?

Yes No

Use the up arrow for prior messages

Partnership company type

IBM Watson Assistant Lite Upgrade Banking Bot

Current

Customer starts with: Current Account

Conversation steps

1 What's your company type? Partnership Proprietorship

↓ Continue to next step

1 is Partnership

2 Please take the following documents and approach the closest bank branch

Go to action: End

1 is Proprietorship

3 Please take the following documents and approach the closest bank branch

Go to action: End

New step +

Step 3 is taken with conditions

Conditions 1 condition

If All of this is true:

1. What's your comp... is Proprietorship

and Add condition +

New condition group +

Assistant says

Please take the following documents and approach the closest bank branch

1. Income tax returns of the proprietor for last 3 years

2. Company Agreement

3. Pan Card

Define customer response

Preview

Partnership Proprietorship

Proprietorship

Please take the following documents and approach the closest bank branch

1. Income tax returns of the proprietor for last 3 years

2. Company Agreement

3. Pan Card

go to End

Do you want to know other services?

Yes No

Use the up arrow for prior messages

Proprietorship company type