

PROJECT DEVELOPMENT PHASE

SPRINT-1

DATE	17 October 2022
TEAM ID	PNT2022TMID15202
PROJECT NAME	AI BASED DISCOURSE FOR BANKING INDUSTRY

IBM Cloud Search resources and products... Catalog Manage REESHMA RAJESHKU...

Watson Assistant

Watson Assistant lets you build conversational interfaces into any application, device, or channel.

Create About

Type: Service

Provider: IBM

Last updated: 11/02/2022

Category: AI / Machine Learning

Compliance: EU Supported, HIPAA Enabled, IAM-enabled

Location: Sydney, Frankfurt

Select a location: Dallas (us-south)

Select a pricing plan

Displayed prices do not include tax. Monthly prices shown are for country or location: [United States](#)

Plan	Features	Pricing
Lite	Everything you need to get started, free for as long as you need it Up to 1,000 unique monthly active users (MAUs) chatting with your assistant Up to 10,000 messages per month --- Features --- - World-class conversational AI with Watson	Free

Summary

Watson Assistant Free

Location: Dallas
Plan: Lite
Service name: Watson Assistant-np
Resource group: Default

☒ I have read and agree to the following license agreements: [Terms](#)

[Create](#)

[Add to estimate](#)

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Watson Assistant-np

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.us-south.assistant.watson.cloud.ibm.com/instances/>

Plan

Lite

[Upgrade](#)

IBM Watson Assistant

Life

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 Chatbot

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

Description (optional)

39/128

AI based discourse for Banking Industry

Assistant language

English (US)

This is the language your assistant will speak.

IBM Watson Assistant

Life

Upgrade

Banking Chatbot

Learning center

?

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Welcome to the new Watson Assistant

BackNext

CreatePersonalizeCustomizePreview

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?

Banking and financial services

What is your role on the team building the assistant?

Developer

Which statement describes your needs best?

I want to make it easier for my customers to find what they're looking for in my a

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?

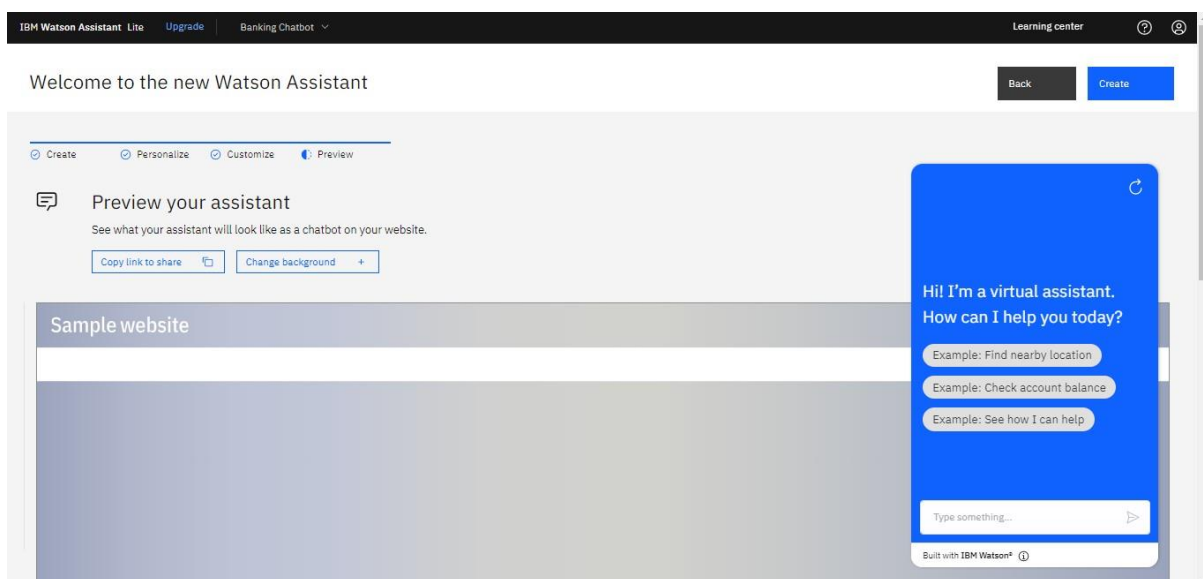
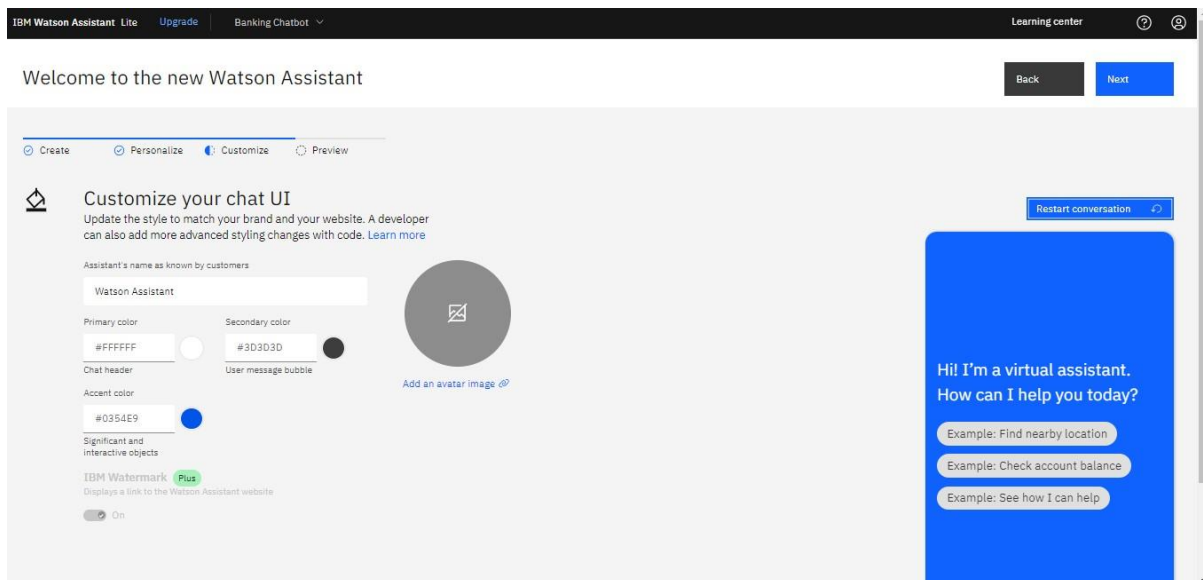
I'm looking for a size nine in white

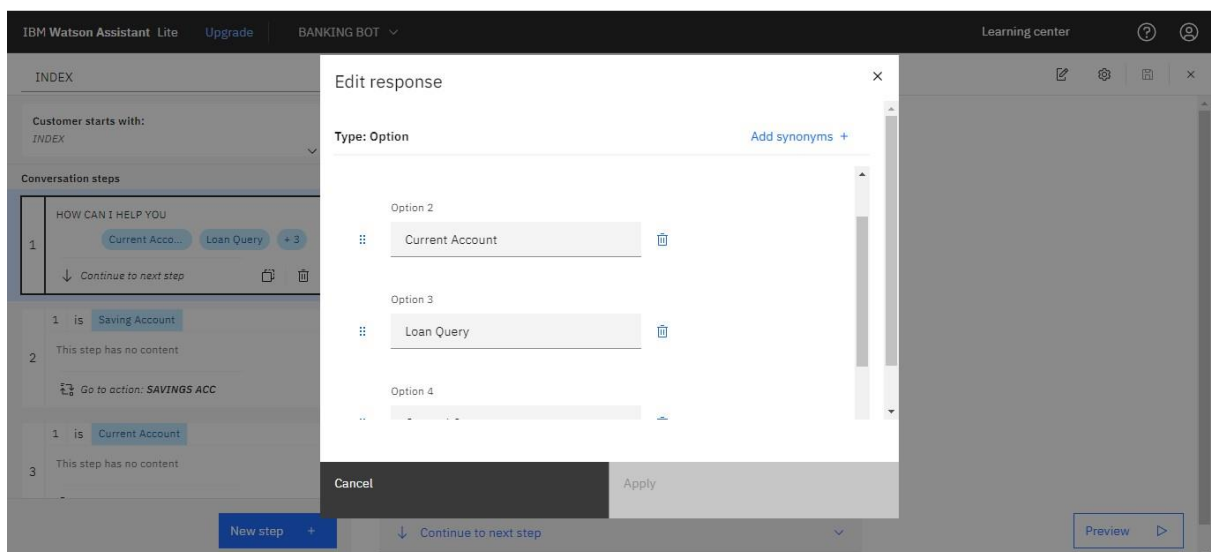
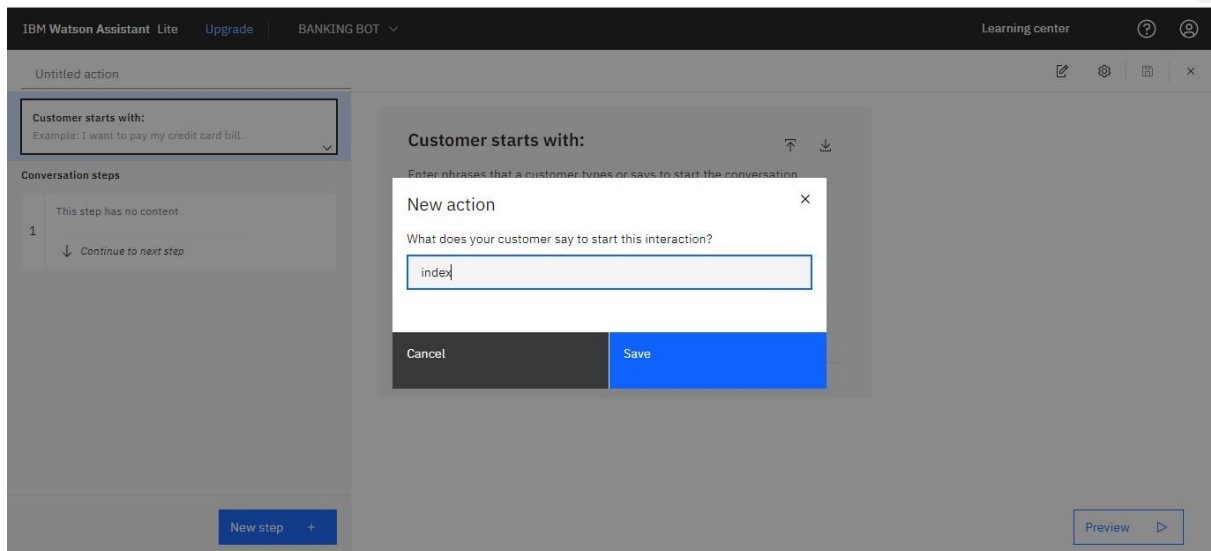
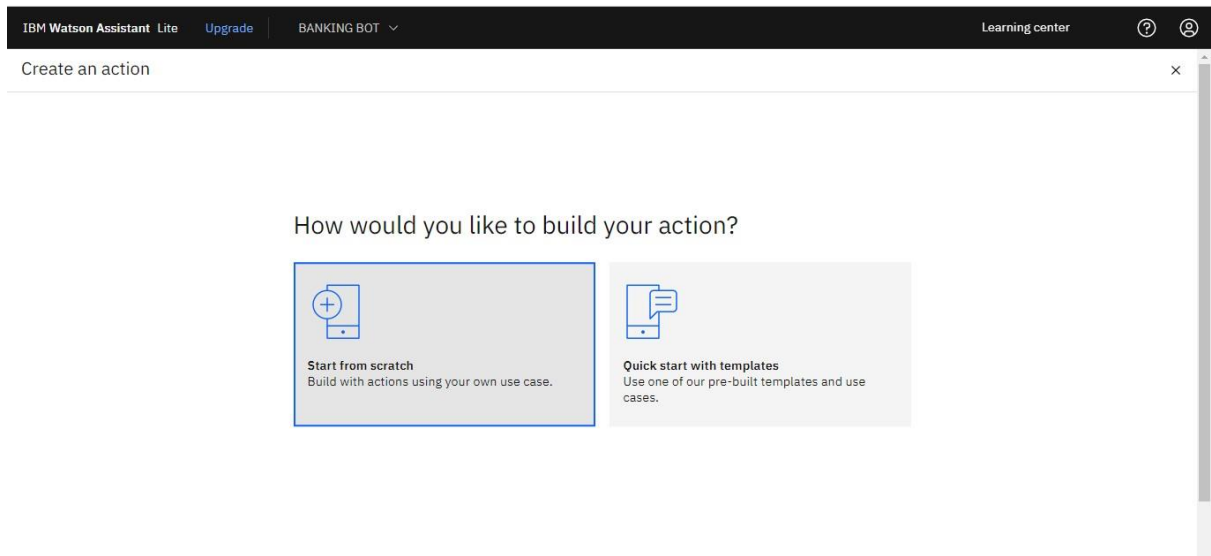
Great news! The Speed Demons are available in white in a size 9.

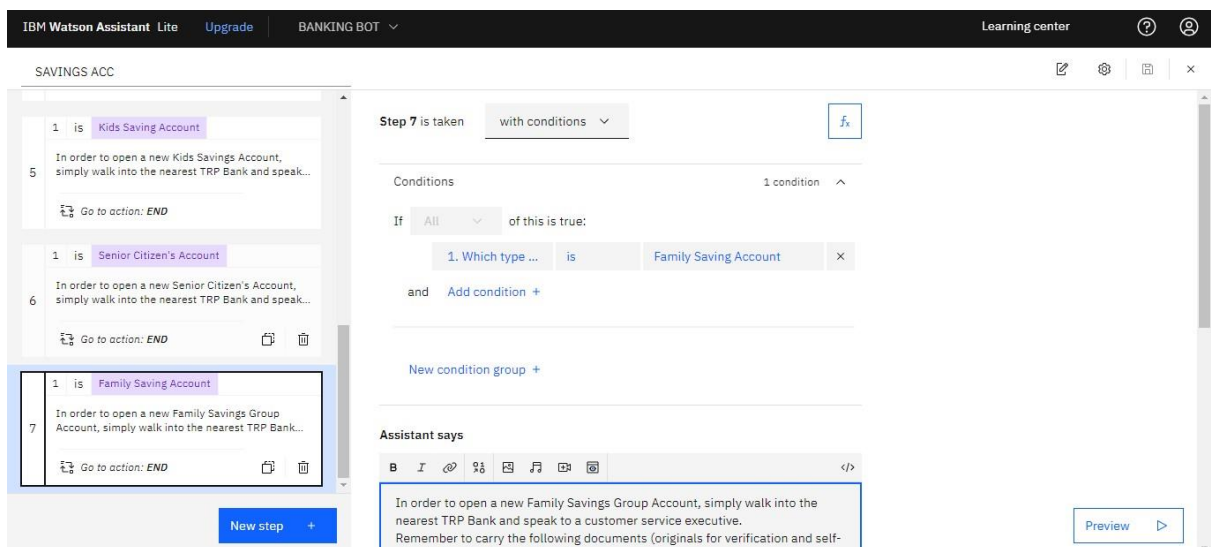
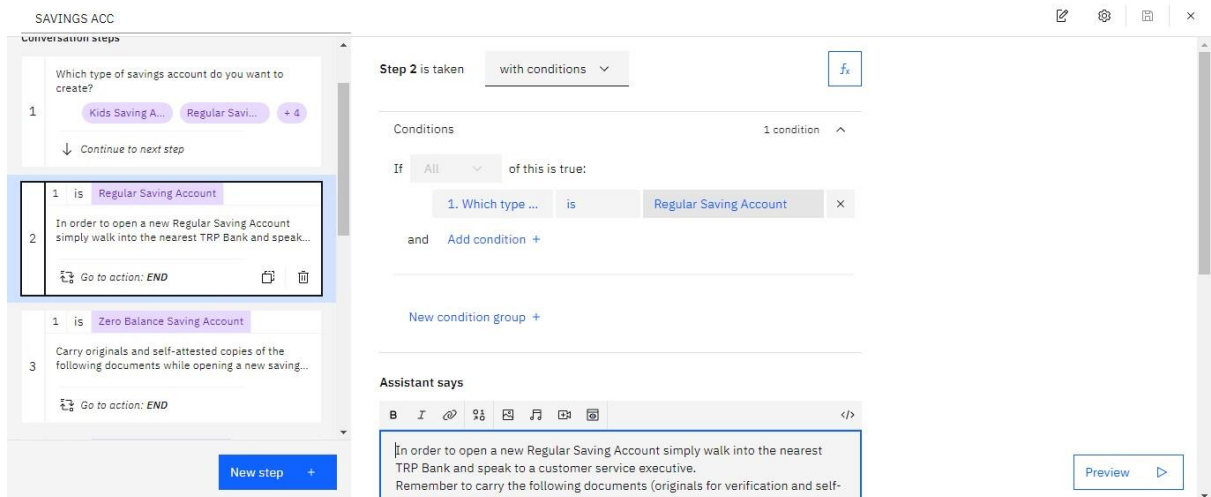
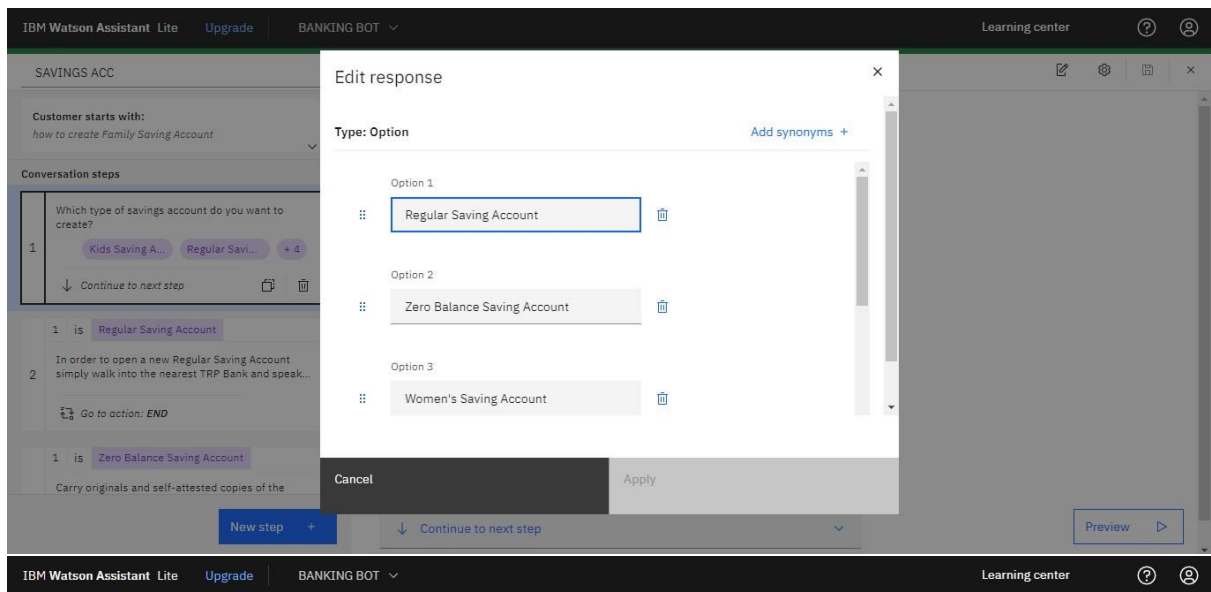
You can purchase them for curbside pick up or we can ship them to you. Which would you prefer?

I'll pick them up!

Ship them to me, please!







IBM Watson Assistant LiteUpgradeBANKING BOTLearning center

CURRENT ACC

Customer starts with:
how to create Single Column Cash Book

Conversation steps

1

Which type of current account do you want to create?

Single Colum...Foreign Curr...+ 3

Continue to next step

1 is Premium Current Account

2

Some of the documents required for opening a Premium Current Account are: 1. Proof of the...

Go to action: END

1 is Standard Current Account

Some of the documents required for opening a

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 thisTotal: 6

Enter a phrase

how to create Premium Current Account

how to create Standard Current Account

how to create Packaged Current Account

how to create Foreign Currency Account

Preview

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CURRENT ACC

Customer starts with:
how to create Single Column Cash Book

Conversation steps

1

Which type of current account do you want to create?

Single Colum...Foreign Curr...+ 3

Continue to next step

1 is Premium Current Account

2

Some of the documents required for opening a Premium Current Account are: 1. Proof of the...

Go to action: END

1 is Standard Current Account

Some of the documents required for opening a

New step +

Edit response

Type: OptionAdd synonyms +

Option 1

Premium Current Account

Option 2

Standard Current Account

Option 3

Packaged Current Account

CancelApply

Continue to next step

Preview

IBM Watson Assistant LiteUpgradeBANKING BOTLearning center

CURRENT ACC

Conversation steps

1

Which type of current account do you want to create?

Single Column...Foreign Curr...+ 3

Continue to next step

1

is

Premium Current Account

Some of the documents required for opening a Premium Current Account are: 1. Proof of the...

2

Go to action: END

1

is

Standard Current Account

Some of the documents required for opening a Standard Current Account are:

3

Go to action: END

New step +

Step 2 is takenwith conditionsfx

Conditions1 condition

IfAll of this is true:

1. Which type ...isPremium Current Accountx

andAdd condition +

New condition group +

Assistant says

Some of the documents required for opening a Premium Current Account are:
1. Proof of the existence of the business
2. Proof of address of the business

Preview

IBM Watson Assistant LiteUpgradeBANKING BOTLearning center

CURRENT ACC

Conversation steps

1

is

Packaged Current Account

Some of the documents required for opening a Packaged Current Account are:

4

Go to action: END

1

is

Foreign Currency Account

Some of the documents required for opening a Foreign Current Account are:

5

Go to action: END

1

is

Single Column Cash Book

Some of the documents required for opening a Single Column Cash Book Current Account are:

6

Go to action: END

New step +

Step 6 is takenwith conditionsfx

Conditions1 condition

IfAll of this is true:

1. Which type ...isSingle Column Cash Bookx

andAdd condition +

New condition group +

Assistant says

Some of the documents required for opening a Single Column Cash Book Current Account are:

- Proof of the existence of the business

Preview

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Learning center

END

Customer starts with:
END

Conversation steps

1

Do You Want To Know About Some Other Services?

NoYes

Continue to next step

1 is No

2

Thank you. Have a Nice Day.

Continue to next step

1 is Yes

3

This step has no content

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: 1

Enter a phrase

END

Preview

IBM Watson Assistant LiteUpgradeBANKING BOT

Learning center

END

Customer starts with:
END

Conversation steps

1

Do You Want To Know About Some Other Services?

NoYes

Continue to next step

1 is No

2

Thank you. Have a Nice Day.

Continue to next step

1 is Yes

3

This step has no content

New step

Step 1 is taken without conditions

Assistant says

Do You Want To Know About Some Other Services?

YesNo

Edit responseEdit validation

And then

Continue to next step

Preview

