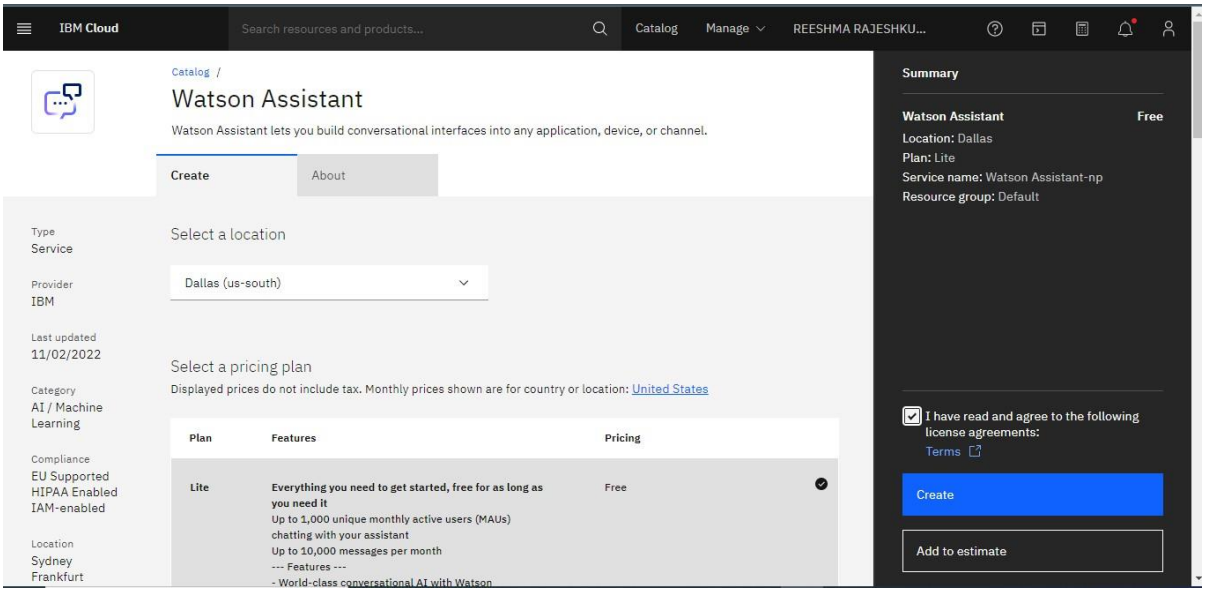
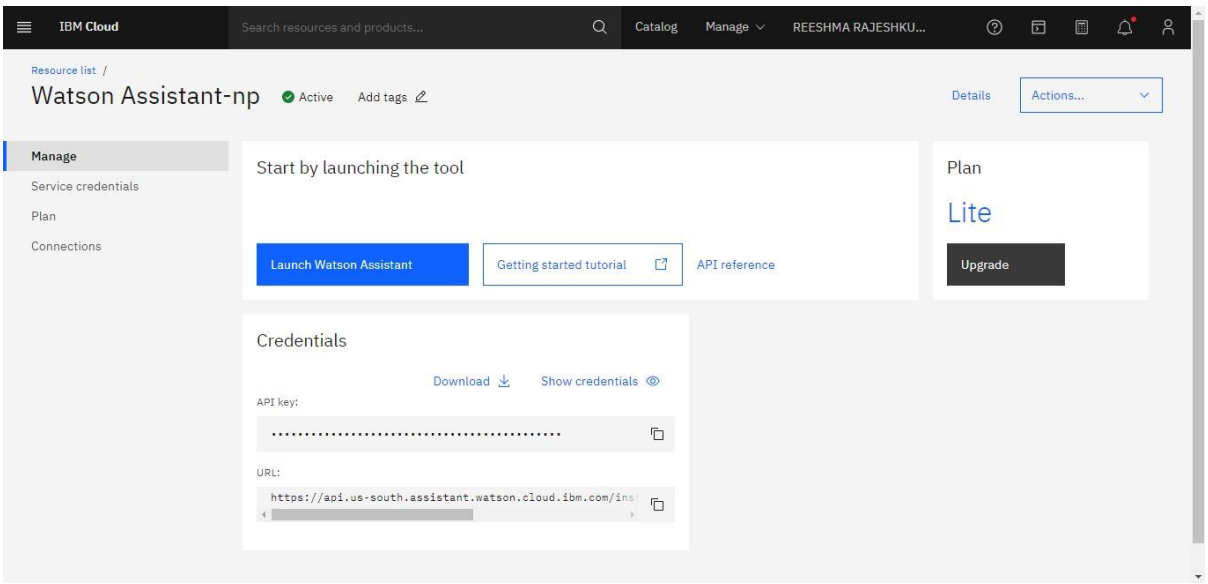
PROJECT DEVELOPMENT PHASE

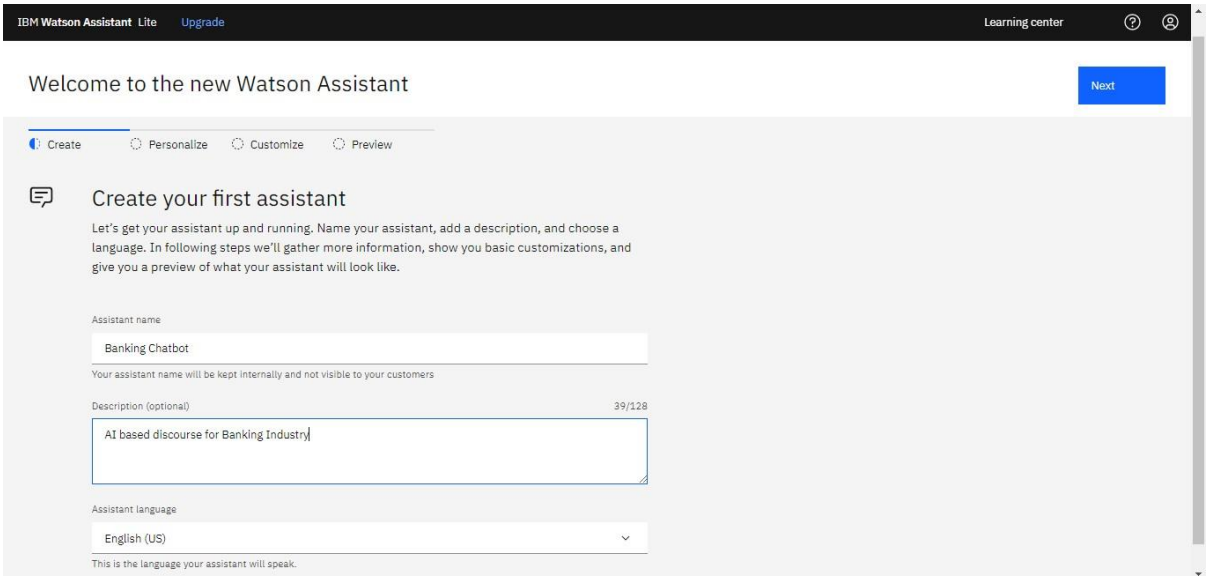
SPRINT-1

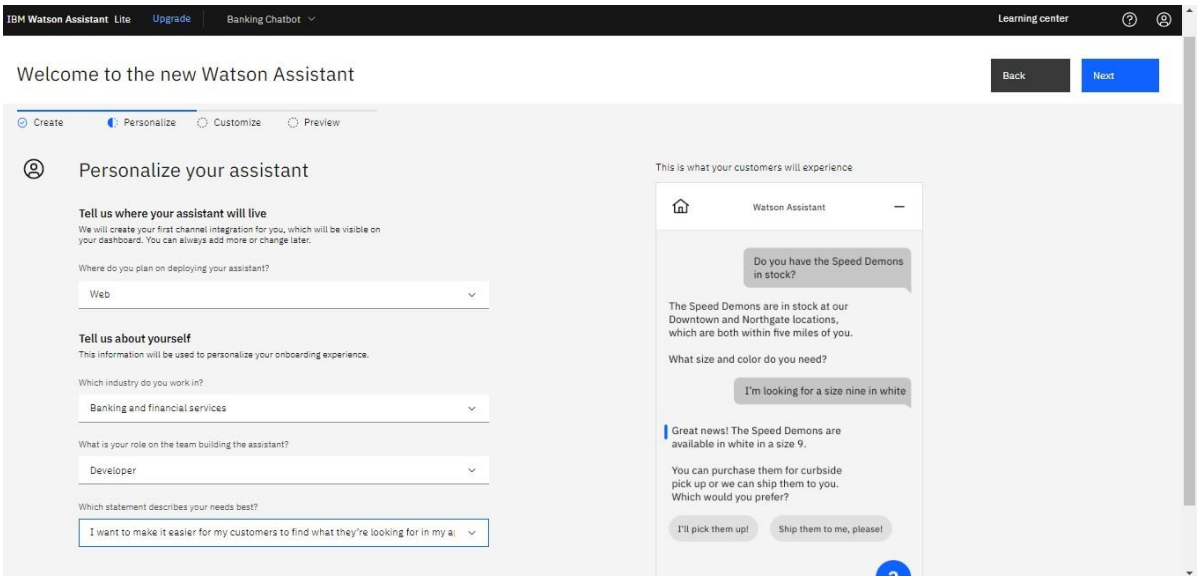
DATE	9 NOVEMBER 2022
TEAM ID	PNT2022TMID19961
PROJECT NAME	AI BASED DISCOURSE FOR BANKING INDUSTRY

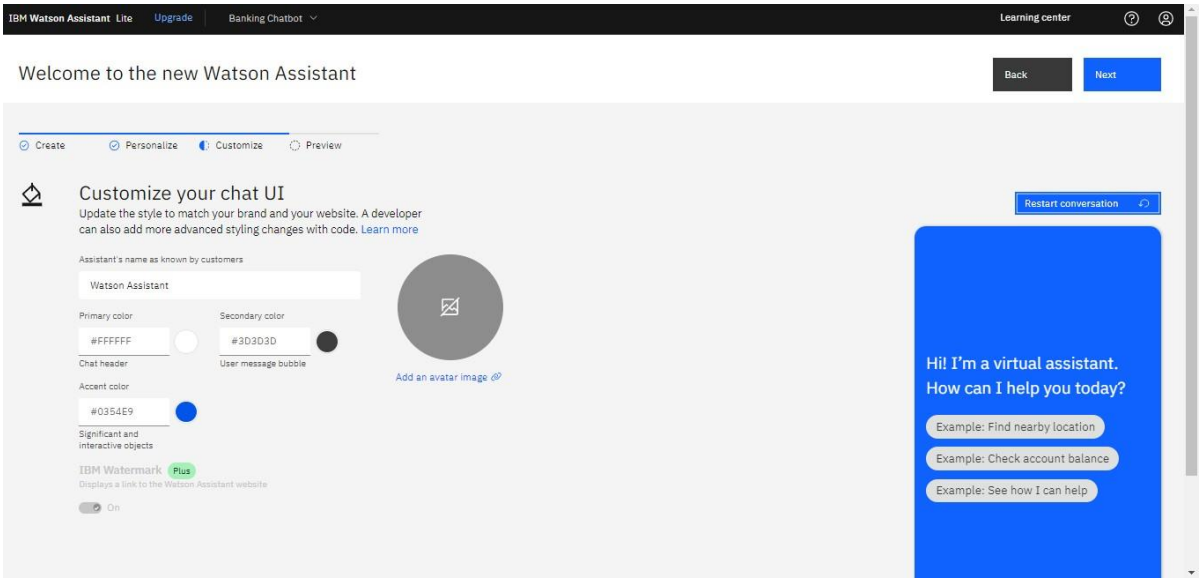
CREATING IBM SERVICES

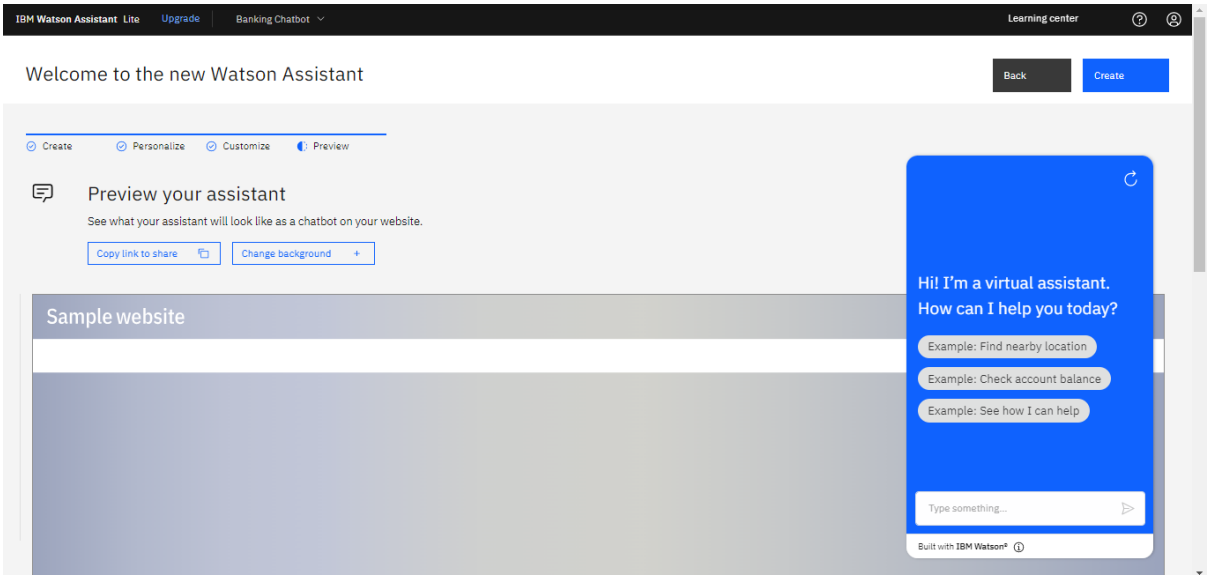


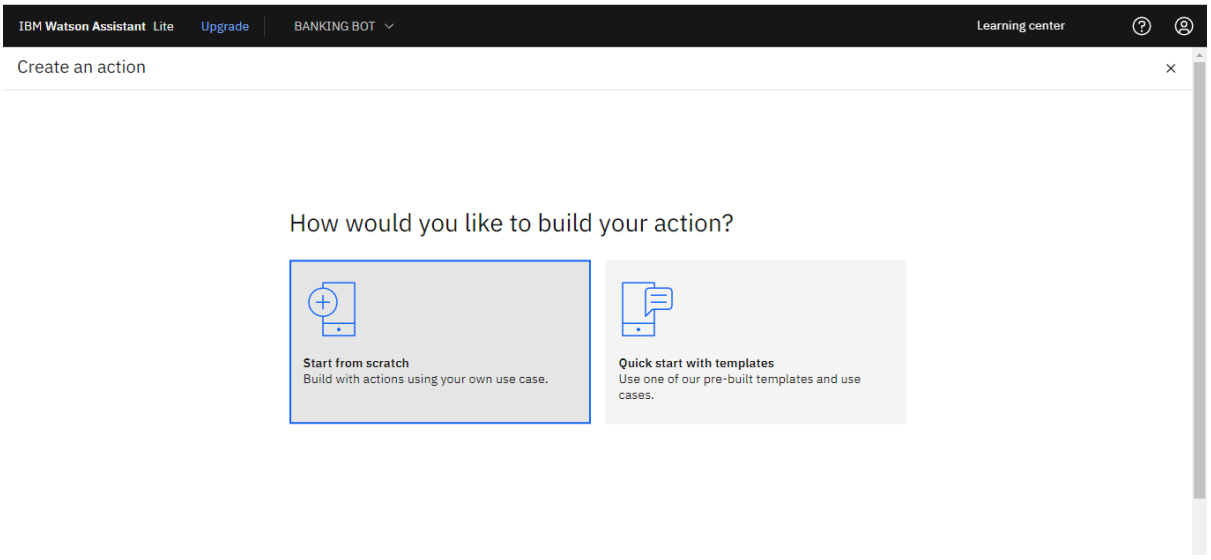


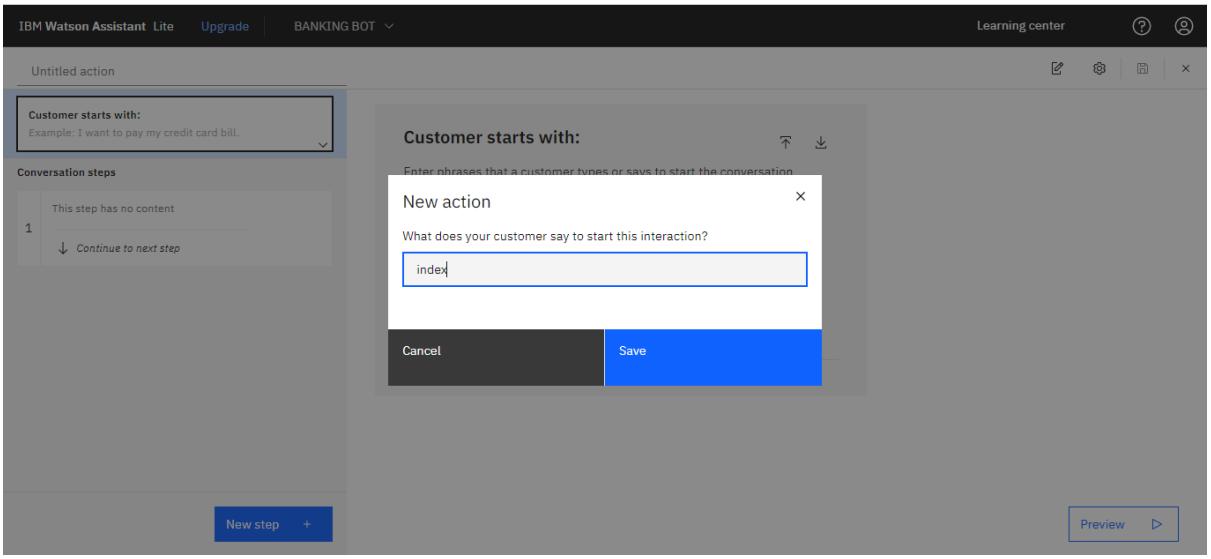

IBM Watson Assistant Lite
Upgrade
Learning center
Welcome to the new Watson Assistant
Next
Create
Personalize
Customize
Preview
Create your first assistant
Let's get your assistant up and running. Name your assistant, add a description, and choose a language. In following steps we'll gather more information, 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.

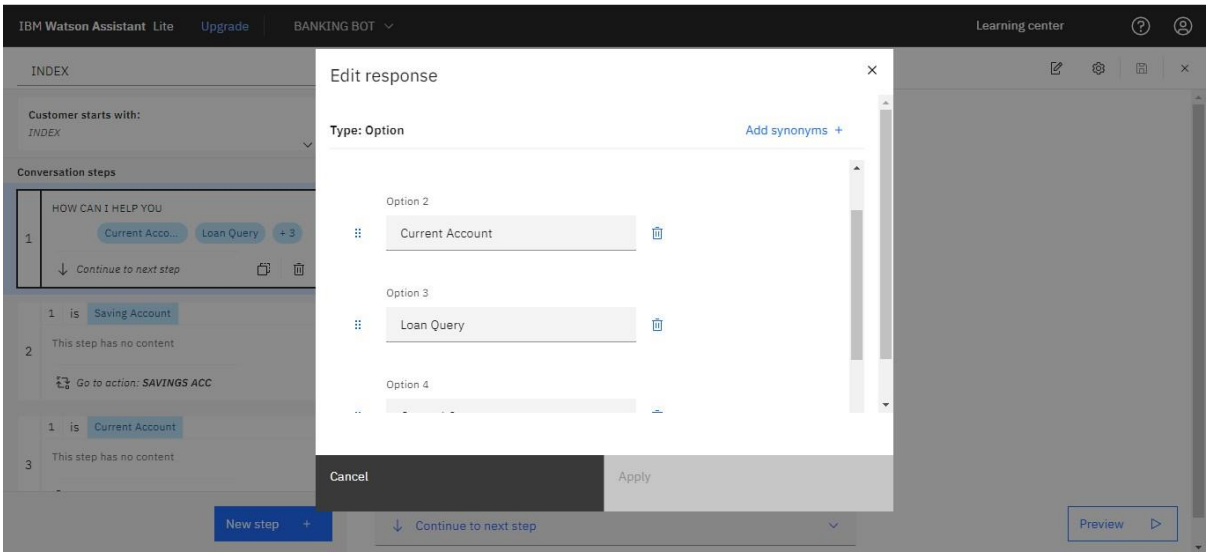

IBM Watson Assistant Lite
Upgrade
Banking Chatbot
Learning center
Welcome to the new Watson Assistant
Back
Next
Create
Personalize
Customize
Preview
Personalize your assistant
Tell us where your assistant will live
We will create your first channel integration for you, which will be visible on your dashboard. 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?
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!

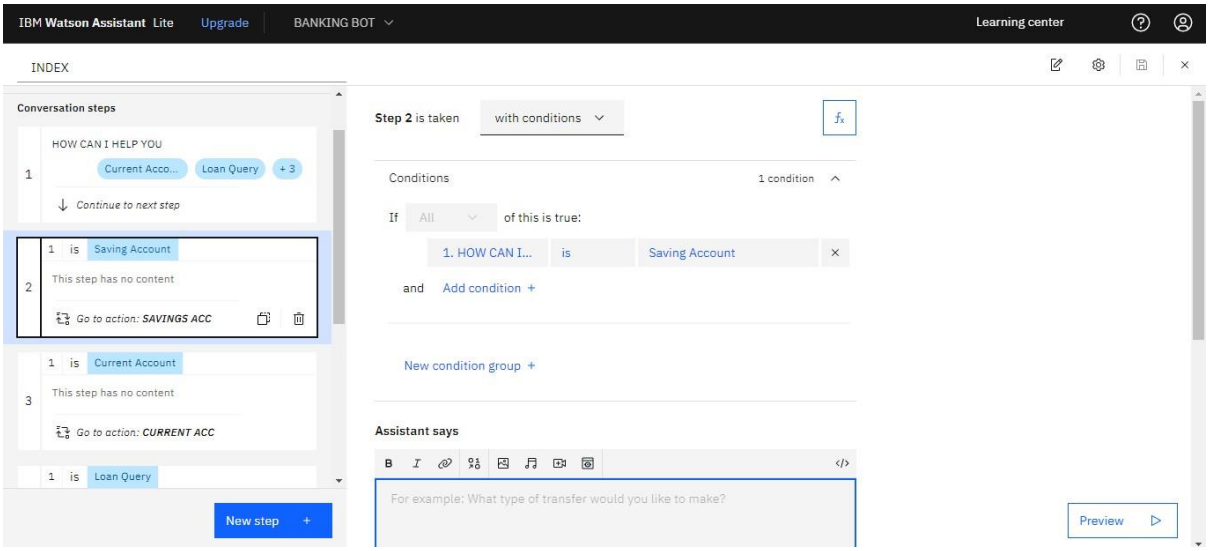

IBM Watson Assistant Lite
Upgrade
Banking Chatbot
Learning center
Welcome to the new Watson Assistant
Back
Next
Create
Personalize
Customize
Preview
Customize your chat UI
Update the style to match your brand and your website. A developer can also add more advanced styling changes with code. Learn more
Assistant's name as known by customers
Watson Assistant
Primary color
#FFFFFF
Chat header
Secondary color
#3D3D3D
User message bubble
Accent color
#0354E9
Significant and interactive objects
IBM Watermark
Plus
Displays a link to the Watson Assistant website
On
Add an avatar image
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

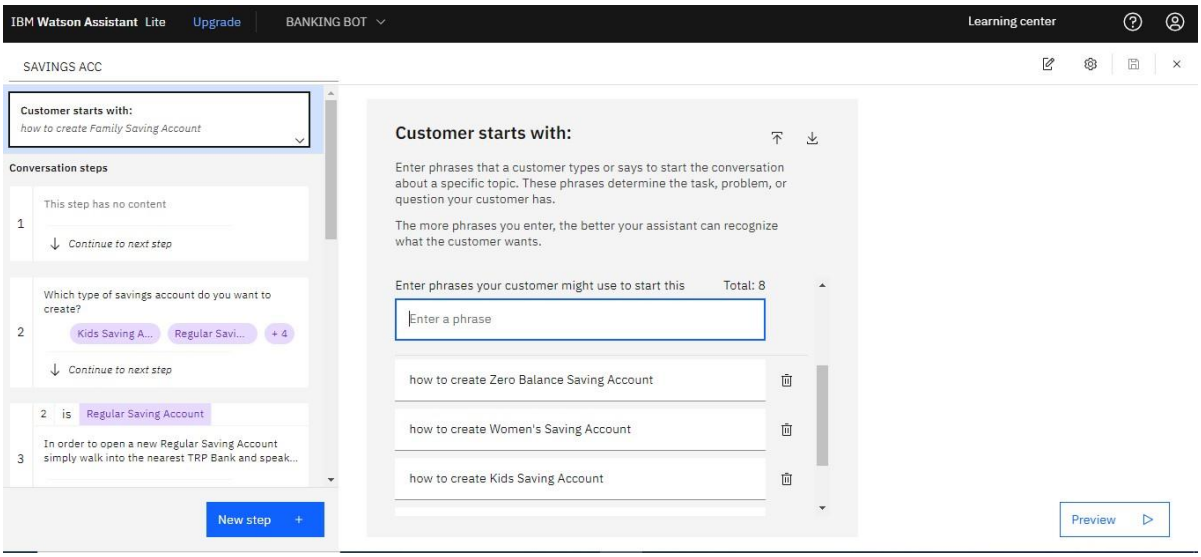

IBM Watson Assistant Lite
Upgrade
Banking Chatbot
Learning center
Welcome to the new Watson Assistant
Back
Create
Create
Personalize
Customize
Preview
Preview your assistant
See what your assistant will look like as a chatbot on your website.
Copy link to share
Change background
Sample website
Hi! I'm 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®

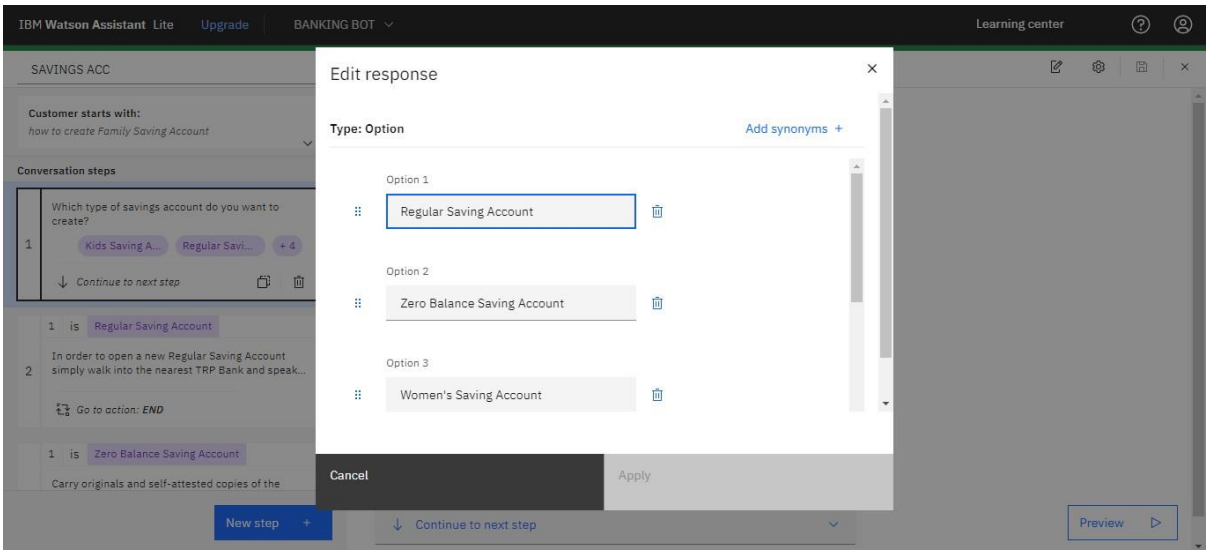

IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
Create an action
How would you like to build your action?
Start from scratch
Build with actions using your own use case.
Quick start with templates
Use one of our pre-built templates and use cases.

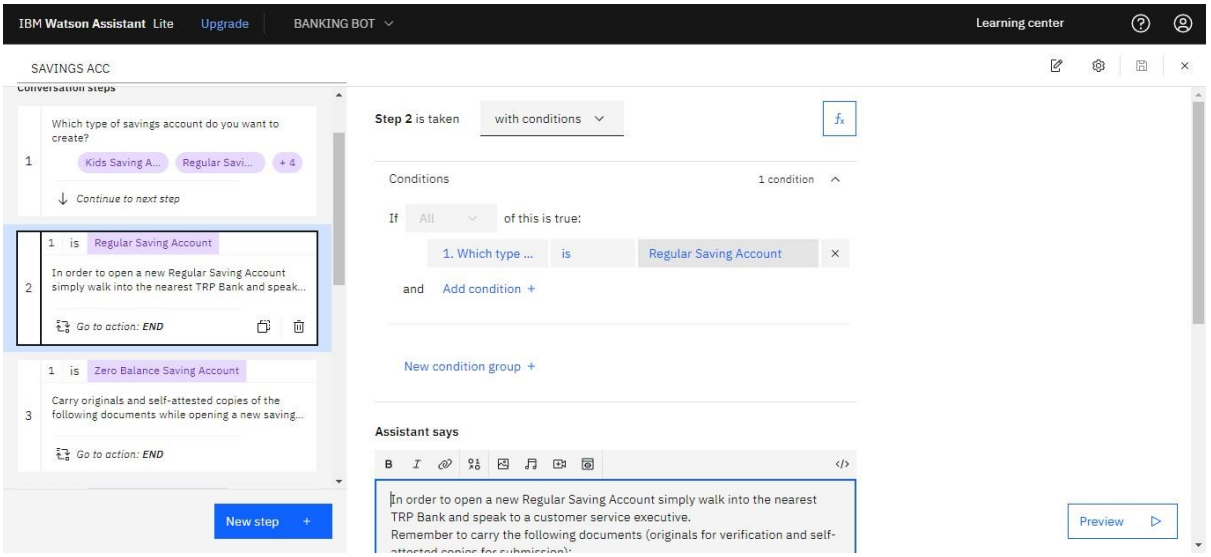

IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
Untitled action
Customer starts with:
Example: I want to pay my credit card bill.
Conversation steps
This step has no content
Continue to next step
Customer starts with:
New action
What does your customer say to start this interaction?
index
Cancel
Save
New step
Preview

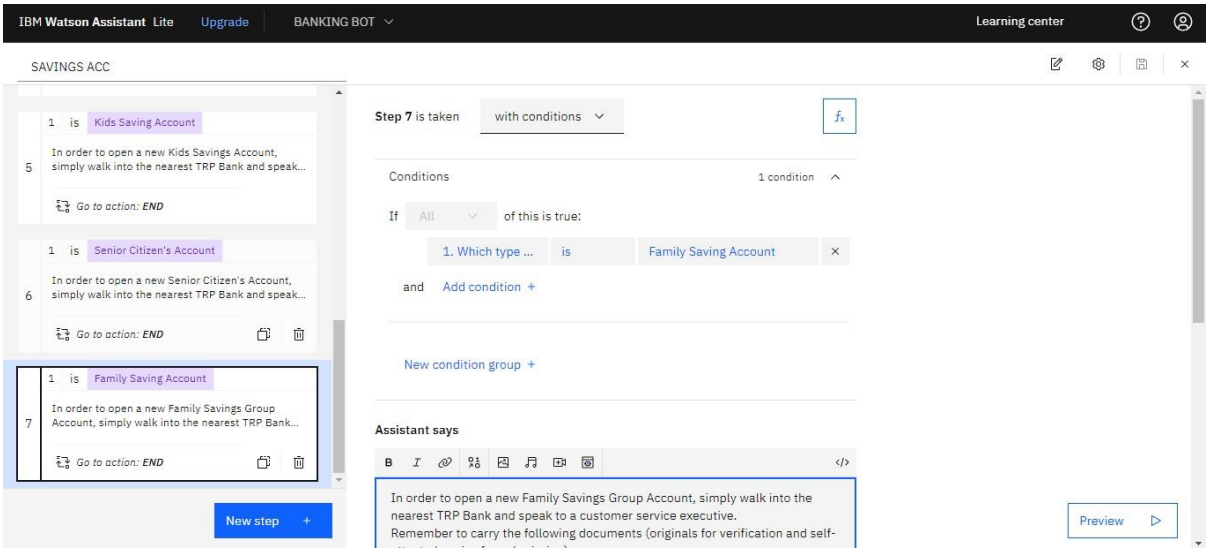

IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
INDEX
Customer starts with:
INDEX
Conversation steps
HOW CAN I HELP YOU
Current Acco...
Loan Query
+ 3
Continue to next step
1 is Saving Account
This step has no content
Go to action: SAVINGS ACC
1 is Current Account
This step has no content
Edit response
Type: Option
Add synonyms +
Option 2
Current Account
Option 3
Loan Query
Option 4
Cancel
Apply
New step
Continue to next step
Preview

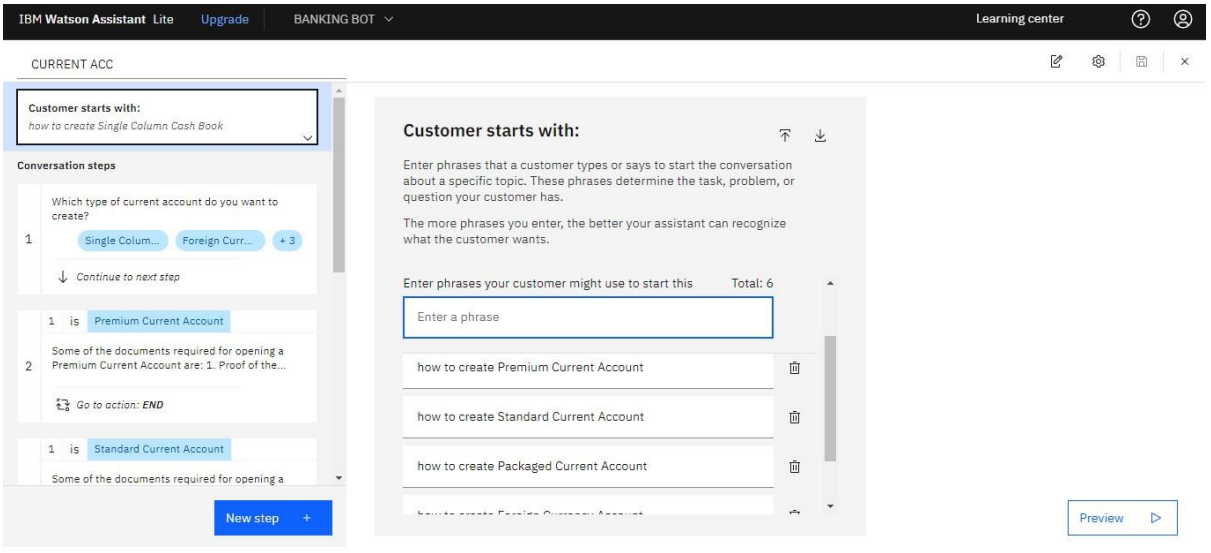

IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
INDEX
Conversation steps
HOW CAN I HELP YOU
Current Acco...
Loan Query
+ 3
Continue to next step
1 is Saving Account
This step has no content
Go to action: SAVINGS ACC
1 is Current Account
This step has no content
Go to action: CURRENT ACC
1 is Loan Query
New step
Step 2 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. HOW CAN I...
is
Saving Account
and
Add condition +
New condition group +
Assistant says
For example: What type of transfer would you like to make?
Preview

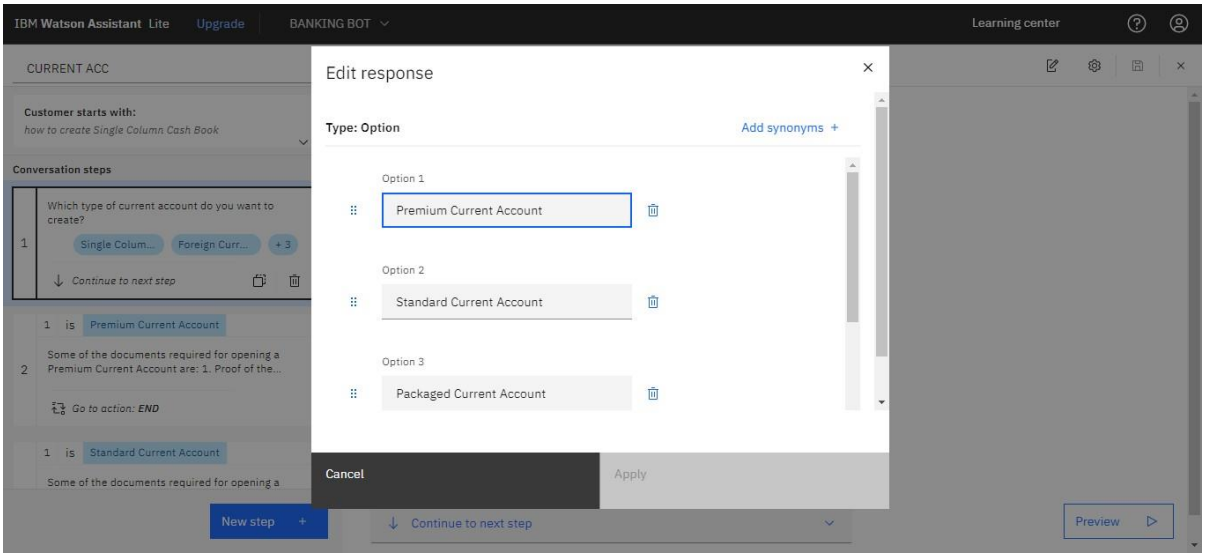

IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
SAVINGS ACC
Customer starts with:
how to create Family Saving Account
Conversation steps
This step has no content
Continue to next step
Which type of savings account do you want to create?
Kids Saving A...
Regular Savi...
+ 4
Continue to next step
2 is Regular Saving Account
In order to open a new Regular Saving Account simply walk into the nearest TRP Bank and speak...
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
Total: 8
Enter a phrase
how to create Zero Balance Saving Account
how to create Women's Saving Account
how to create Kids Saving Account
Preview

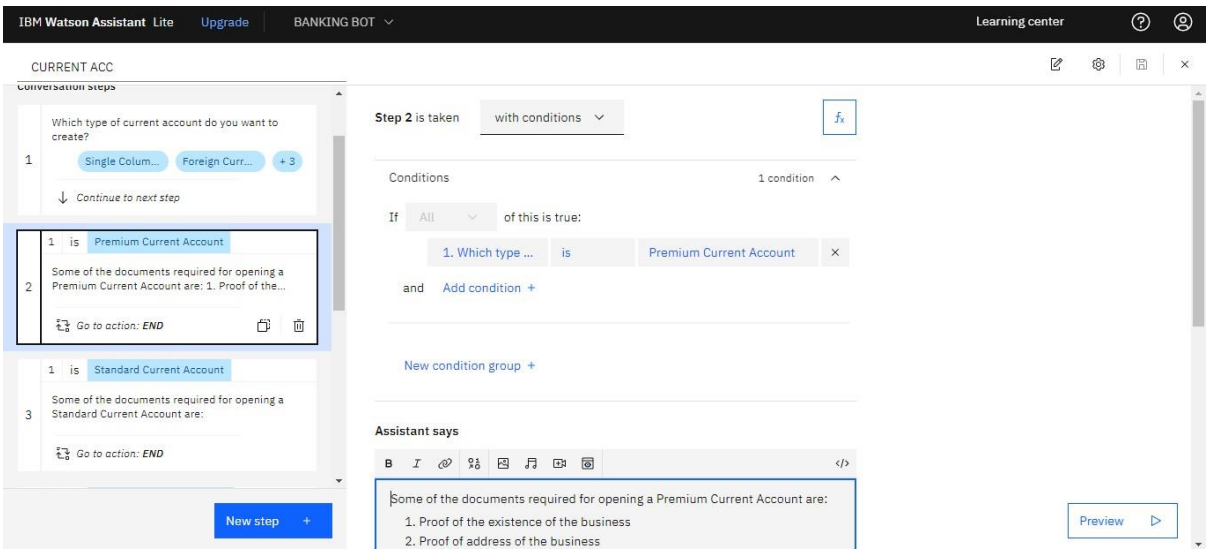

IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
SAVINGS ACC
Customer starts with:
how to create Family Saving Account
Conversation steps
Which type of savings account do you want to create?
Kids Saving A...
Regular Savi...
+ 4
Continue to next step
1 is Regular Saving Account
In order to open a new Regular Saving Account simply walk into the nearest TRP Bank and speak...
Go to action: END
1 is Zero Balance Saving Account
Carry originals and self-attested copies of the
New step
Edit response
Type: Option
Add synonyms +
Option 1
Regular Saving Account
Option 2
Zero Balance Saving Account
Option 3
Women's Saving Account
Cancel
Apply
Continue to next step
Preview

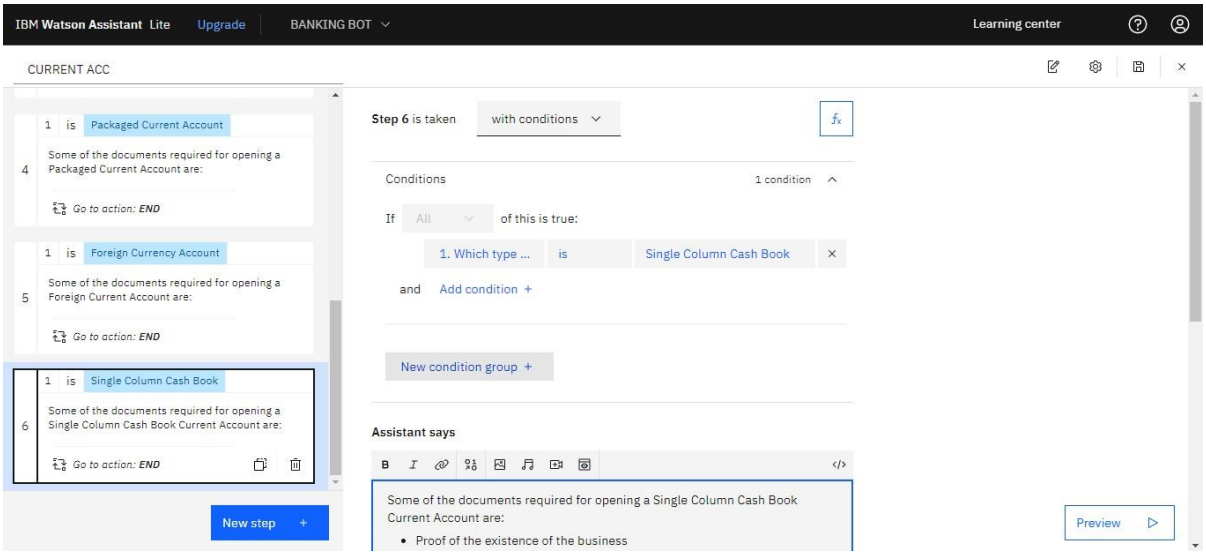

IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
SAVINGS ACC
Which type of savings account do you want to create?
Kids Saving A...
Regular Savi...
+ 4
Continue to next step
1 is Regular Saving Account
In order to open a new Regular Saving Account simply walk into the nearest TRP Bank and speak...
Go to action: END
1 is Zero Balance Saving Account
Carry originals and self-attested copies of the following documents while opening a new saving...
Go to action: END
New step
Step 2 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Which type ...
is
Regular Saving Account
and
Add condition +
New condition group +
Assistant says
In order to open a new Regular Saving Account simply walk into the nearest TRP Bank and speak to a customer service executive.
Remember to carry the following documents (originals for verification and self-
Preview

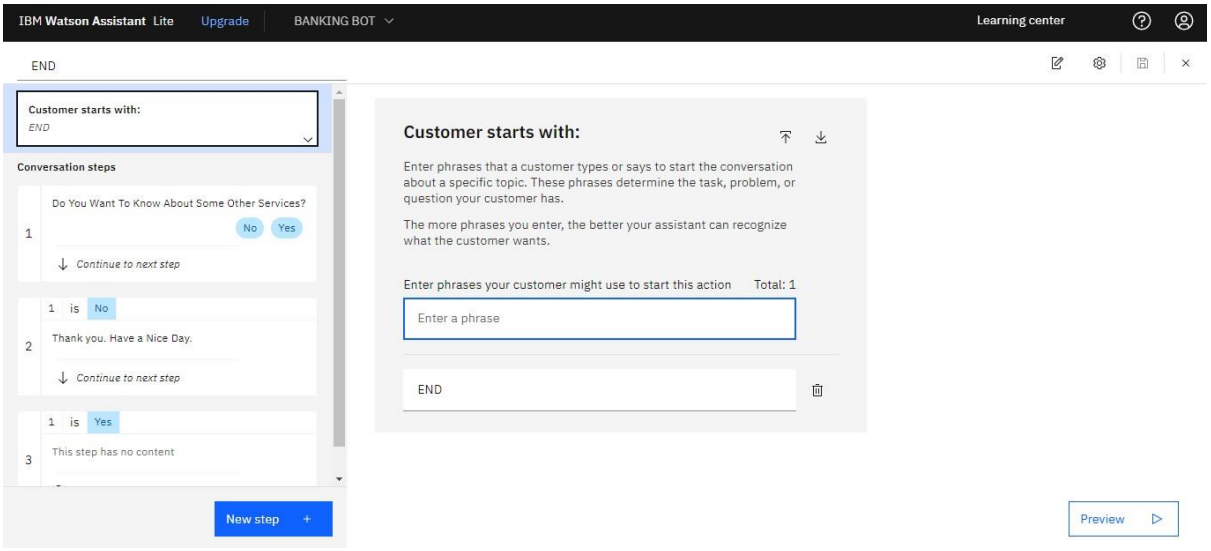

IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
SAVINGS ACC
1 is Kids Saving Account
In order to open a new Kids Savings Account, simply walk into the nearest TRP Bank and speak...
Go to action: END
1 is Senior Citizen's Account
In order to open a new Senior Citizen's Account, simply walk into the nearest TRP Bank and speak...
Go to action: END
1 is Family Saving Account
In order to open a new Family Savings Group Account, simply walk into the nearest TRP Bank...
Go to action: END
New step
Step 7 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Which type ...
is
Family Saving Account
and
Add condition +
New condition group +
Assistant says
In order to open a new Family Savings Group Account, simply walk into the nearest TRP Bank and speak to a customer service executive.
Remember to carry the following documents (originals for verification and self-
Preview

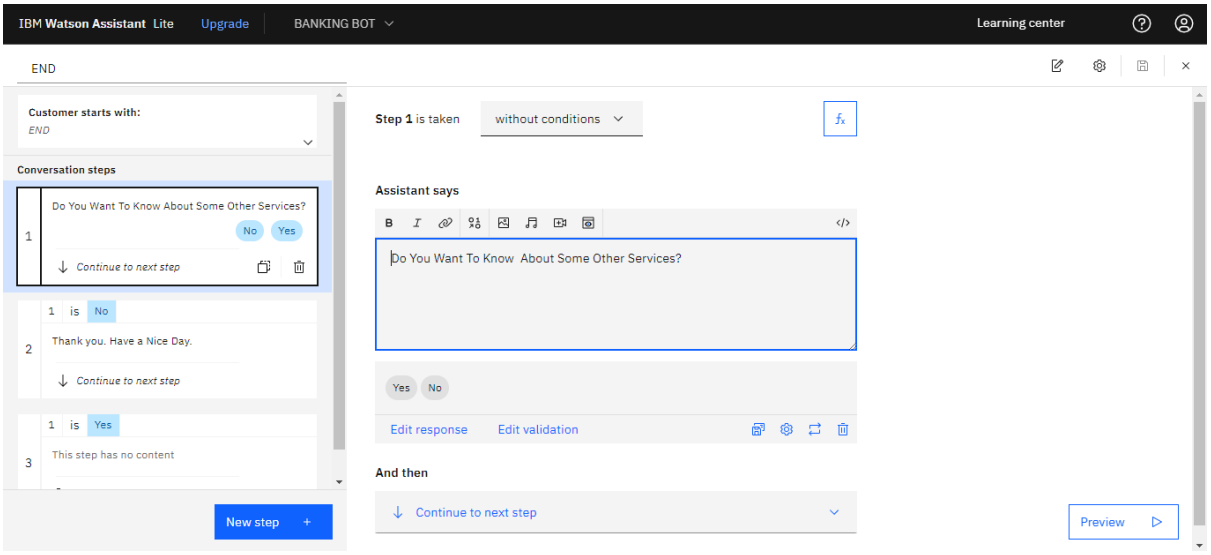

IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
CURRENT ACC
Customer starts with:
how to create Single Column Cash Book
Conversation steps
Which type of current account do you want to create?
Single Colum...
Foreign Curr...
+ 3
Continue to next step
1 is Premium Current Account
Some of the documents required for opening a Premium Current Account are: 1. Proof of the...
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 this
Total: 6
Enter a phrase
how to create Premium Current Account
how to create Standard Current Account
how to create Packaged Current Account
Preview

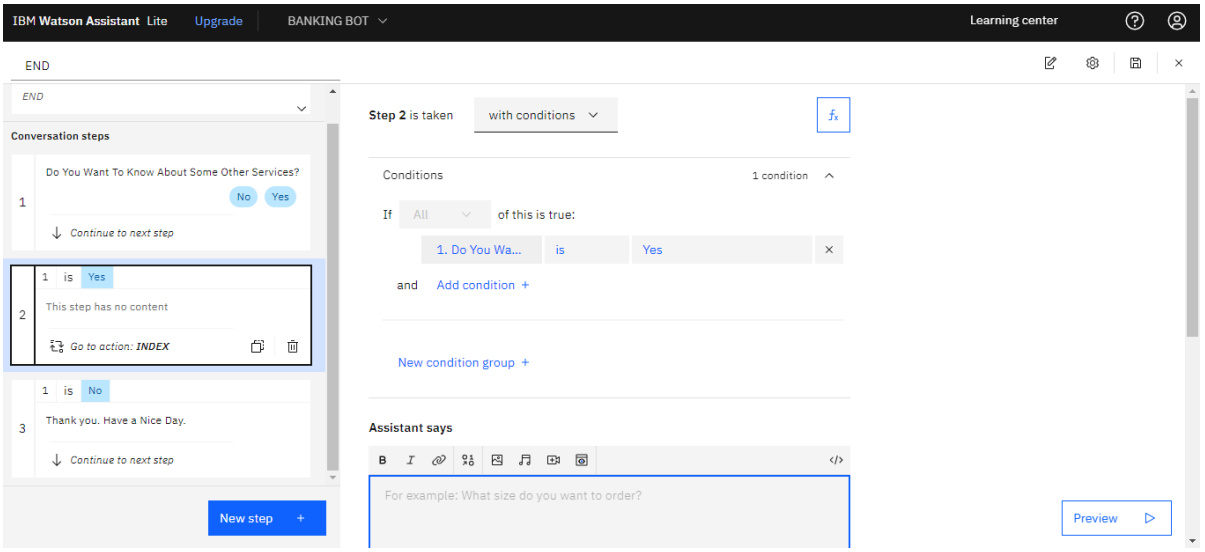

IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
CURRENT ACC
Customer starts with:
how to create Single Column Cash Book
Conversation steps
Which type of current account do you want to create?
Single Colum...
Foreign Curr...
+ 3
Continue to next step
1 is Premium Current Account
Some of the documents required for opening a Premium Current Account are: 1. Proof of the...
Go to action: END
1 is Standard Current Account
Some of the documents required for opening a
New step
Edit response
Type: Option
Add synonyms +
Option 1
Premium Current Account
Option 2
Standard Current Account
Option 3
Packaged Current Account
Cancel
Apply
Continue to next step
Preview

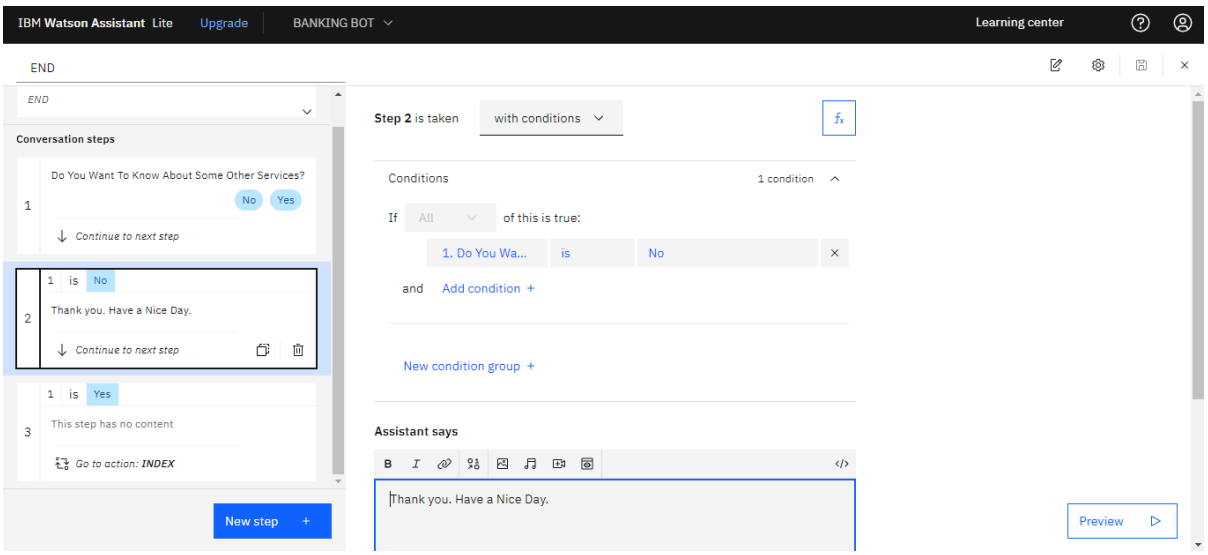

IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
CURRENT ACC
Which type of current account do you want to create?
Single Colum...
Foreign Curr...
+ 3
Continue to next step
1 is Premium Current Account
Some of the documents required for opening a Premium Current Account are: 1. Proof of the...
Go to action: END
1 is Standard Current Account
Some of the documents required for opening a Standard Current Account are:
Go to action: END
New step
Step 2 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Which type ...
is
Premium Current Account
and
Add 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 Lite
Upgrade
BANKING BOT
Learning center
CURRENT ACC
1 is Packaged Current Account
Some of the documents required for opening a Packaged Current Account are:
Go to action: END
1 is Foreign Currency Account
Some of the documents required for opening a Foreign Current Account are:
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:
Go to action: END
New step
Step 6 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Which type ...
is
Single Column Cash Book
and
Add 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


IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
END
Customer starts with:
END
Conversation steps
1 Do You Want To Know About Some Other Services?
No
Yes
Continue to next step
2 1 is No
Thank you. Have a Nice Day.
Continue to next step
3 1 is Yes
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 Lite
Upgrade
BANKING BOT
Learning center
END
Customer starts with:
END
Conversation steps
1 Do You Want To Know About Some Other Services?
No
Yes
Continue to next step
2 1 is No
Thank you. Have a Nice Day.
Continue to next step
3 1 is Yes
This step has no content
New step
Step 1 is taken
without conditions
Assistant says
Do You Want To Know About Some Other Services?
Yes
No
Edit response
Edit validation
And then
Continue to next step
Preview


IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
END
END
Conversation steps
1
Do You Want To Know About Some Other Services?
No
Yes
Continue to next step
2
1 is Yes
This step has no content
Go to action: INDEX
3
1 is No
Thank you. Have a Nice Day.
Continue to next step
New step +
Step 2 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Do You Wa...
is
Yes
and Add condition +
New condition group +
Assistant says
For example: What size do you want to order?
Preview


IBM Watson Assistant Lite
Upgrade
BANKING BOT
Learning center
END
END
Conversation steps
1
Do You Want To Know About Some Other Services?
No
Yes
Continue to next step
2
1 is No
Thank you. Have a Nice Day.
Continue to next step
3
1 is Yes
This step has no content
Go to action: INDEX
New step +
Step 2 is taken
with conditions
Conditions
1 condition
If All of this is true:
1. Do You Wa...
is
No
and Add condition +
New condition group +
Assistant says
Thank you. Have a Nice Day.
Preview