

**PROJECT DEVELOPMENT PHASE**  
**AI Based Discourse for Banking Industry**  
**PNT2022TMID06855**

**SPRINT 1 (Building of Assistant)**

As Per Sprint Delivery Plan ,Sprint 1 includes

User Story – 1 : Creation of Banking Chatbot or Assistant using IBM Watson Assistant/ As a user, I can see a Banking Assistant

User Story – 2 : Understanding Customer's Banking Related Queries and skills/ As a user, I can see a Chatbot with Banking skills

**Created IBM Watson Assistant Service**

Inbox (1,666) - jeevithakesavara

IBM

IBM Watson Service Page

cloud.ibm.com/services/conversation/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F0cd42653c542475797a27fd12b714a82%3Aea723f0...

YouTube Gmail Spotify - Jeevithake... WhatsApp GOVERNMENT COL... IBM-EPBL/IBM-Proj...

IBM Cloud

Search resources and products...

Catalog Manage Jeevitha K's Account

Manage

Service credentials

Plan

Connections

Start by launching the tool

Launch Watson Assistant

Getting started tutorial

API reference

Plan

Lite

Upgrade

Credentials

Download Show credentials

API key:

.....

URL:

https://api.us-south.assistant.watson.cloud.ibm.com/ins...

Activate Windows

Go to Settings to activate Windows.

Type here to search

25°C Cloudy

9:06 PM 11/3/2022

## Watson Assistant


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 Chat Bot

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

Description (optional)

120/128

This banking bot will answer the user's queries related to account creation, loan, net banking and other general queries


Inbox (1,664) - jeevithakesavara] x IBM IBM Watson Service Page x IBM Watson Assistant x

us-south.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F0cd42653c542475797a27fd12b714a82%3Aea7... YouTube Gmail Spotify - Jeevithake... WhatsApp GOVERNMENT COL... IBM-EPBL/IBM-Proj...

IBM Watson Assistant Lite Upgrade Banking bot Learning center

Welcome to the new Watson Assistant

Back Next



### 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](#)

Restart conversation

Assistant's name as known by customers

Watson Assistant

Primary color

#FFFFFF

Secondary color

#3D3D3D

Chat header

Accent color


#0354E9

Significant and interactive objects

IBM Watermark Plus

Displays a link to the Watson Assistant website

Add an avatar image



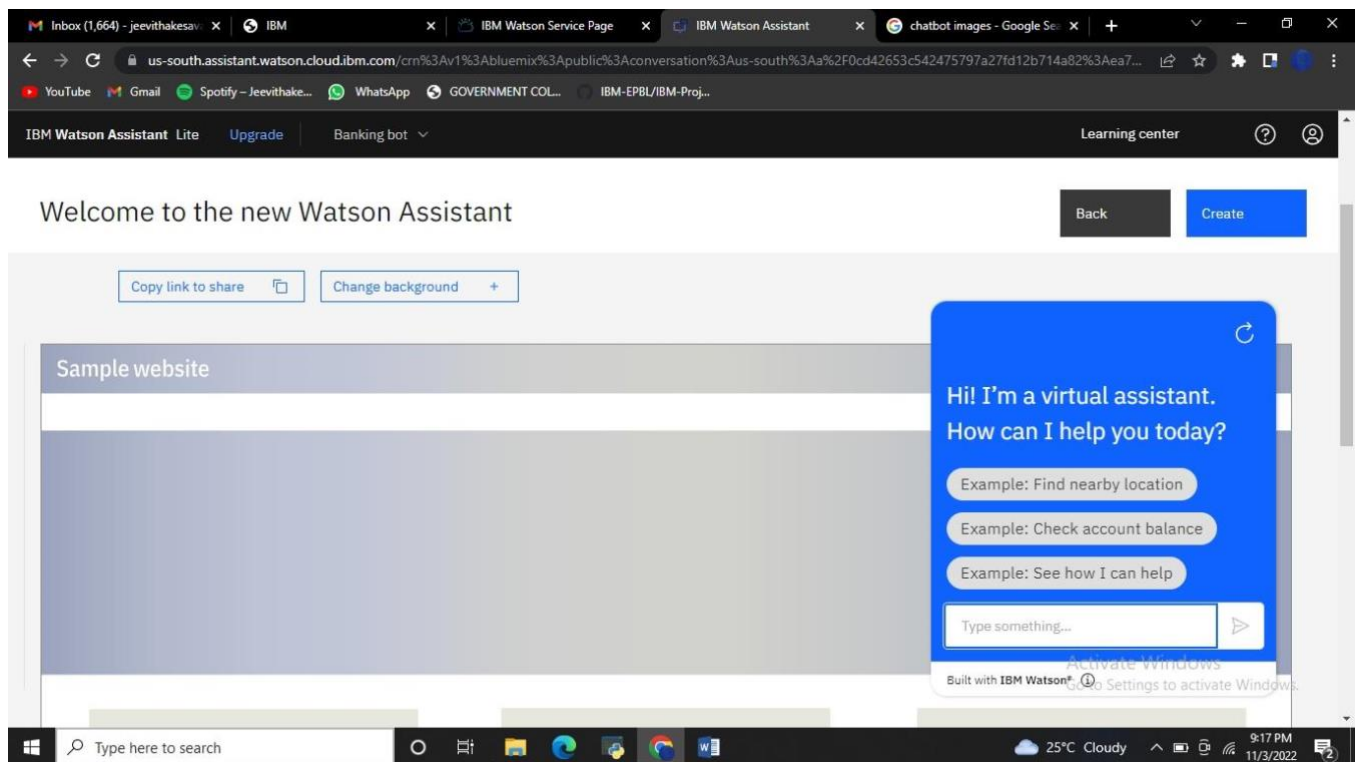
Hi! I'm a virtual assistant. How can I help you today?

Example: Find nearby location

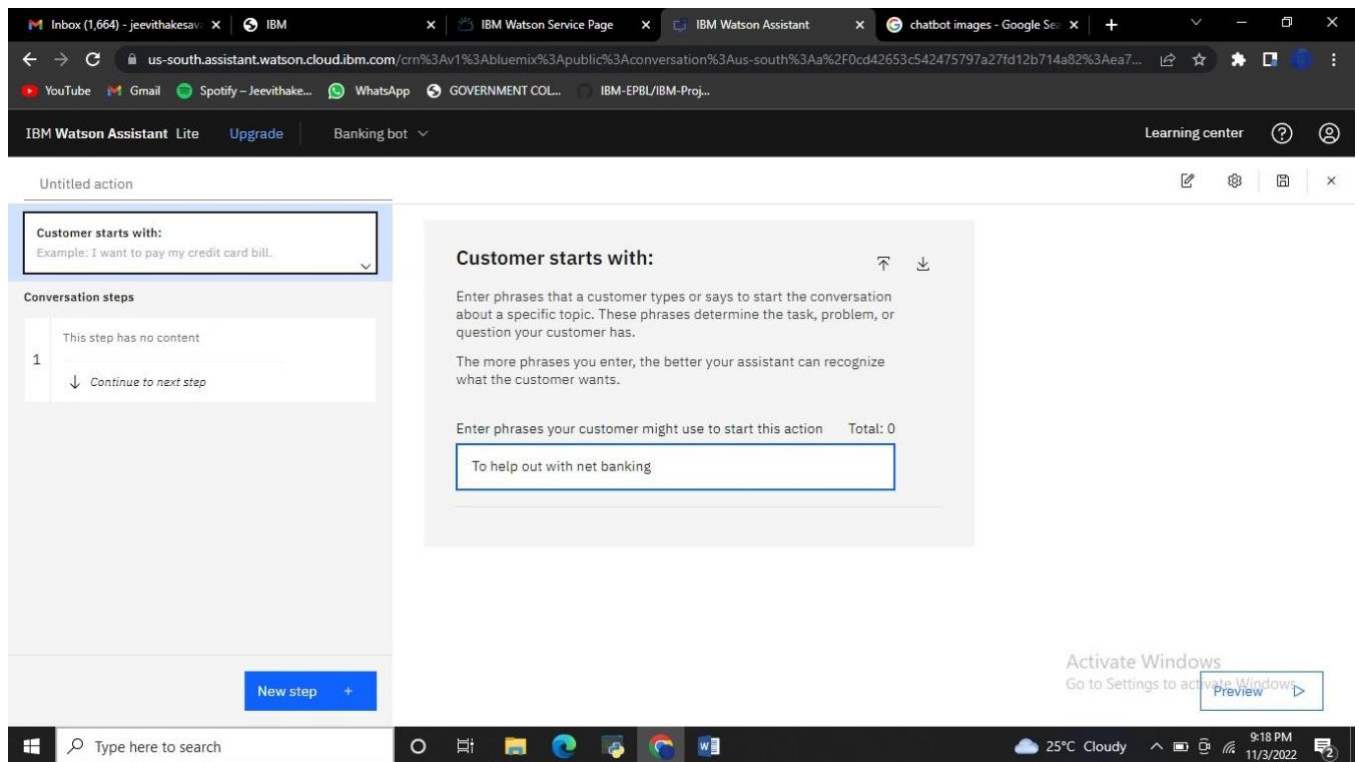
Example: Check account balance

Example: See how I can help

## Preview



## Created Skills and Assistant for Chatbot



## Skills (Actions) created

- Account Creation
- Contact information
- General Banking Queries
- Loan Related Queries
- Net Banking Queries

The screenshot displays the IBM Watson Assistant interface for a banking chatbot. The browser address bar shows the URL: `us-south.assistant.watson.cloud.ibm.com/crm%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F0cd42653c542475797a27fd12b714a82%3Aea7...`. The interface includes a sidebar with navigation options: Actions, Variables, and Saved responses. The main area shows a table of actions created by the user.

Name	Last edited	Examples Count	Status
Net banking	a few seconds ago	1	✓
Create an account	4 minutes ago	1	✓
Request contact information	3 minutes ago	1	✓
General Queries	2 minutes ago	1	✓
Loan	a minute ago	1	✓

At the bottom of the table, it indicates "Items per page: 50" and "Showing 1–5 of 5 actions". A "New action" button is visible in the top right corner of the table area. The Windows taskbar at the bottom shows the time as 9:47 PM on 11/3/2022.

## Chatbot Sample Working Preview

Preview



Greet customer [default]

Welcome, how can I assist you?

I need to create an account

Create an account recognized

I can help you with that! To create an account, we will need a piece of information. Let me guide you through this process!

Yes

No

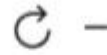
Activate Windows

Use the up arrow for prior messages

Go to Settings to activate Windows



Preview



I can help you with that! To create an account, we will need a piece of information. Let me guide you through this process!

Yes

No

Yes

Do you want a savings account or current account?

Savings account

Current account

Savings account

Activate Windows

Type something...

Go to Settings to activate Windows





