

# PROJECT DEVELOPMENT PHASE

## SPRINT-2

Date	05 November 2022
Team ID	PNT2022TMID48901
Project Name	AI Based Discourse for Banking Industry

### Creating Skills and Assistant for Chatbot

Skills are nothing but actions and steps. Steps are the subset of actions where conversations are built and Assistant is used to integrating skills.

The screenshot shows the IBM Watson Assistant web interface. The browser address bar displays a URL starting with 'au-syd.assistant.watson.cloud.ibm.com'. The page header includes 'IBM Watson Assistant Lite' and 'Upgrade' links, along with a 'Learning center' link. The main heading is 'Welcome to the new Watson Assistant', with a 'Next' button. Below this is a section titled 'Create your first assistant' with a sub-header '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.'

The form contains the following fields:

- Assistant name:** A text input field containing 'Banking Bot'. Below it, a note states: 'Your assistant name will be kept internally and not visible to your customers'.
- Description (optional):** A text area with a character count of '128/128'. The text entered is: 'The Bot will be able to answer Customer queries like to create bank account, Loan queries and regarding general and Net banking.'
- Assistant language:** A dropdown menu currently set to 'English (US)'. Below it, a note states: 'This is the language your assistant will speak.'

The Windows taskbar at the bottom shows the search bar, task view button, and several application icons. The system clock indicates the time is 12:38 on 06-11-2022.

# Create Savings Account

The screenshot shows the IBM Watson Assistant interface for configuring a conversation step named 'Saving'. The left sidebar shows the 'Conversation steps' list with step 1 selected. The main area displays the 'Customer starts with:' configuration. It includes a text input for phrases, a list of phrases (To create a new account, Account Creation, Savings Account, Saving), and a 'New step' button.

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

To create a new account

Account Creation

Savings Account

Saving

New step +

The screenshot shows the IBM Watson Assistant interface for managing actions. The left sidebar shows the 'Actions' list. The main area displays a table of actions. A preview window is open for the 'Savings Account' action, showing a dialog flow.

Actions

Name	Last edited	Example
Thank you!	14 minutes ago	
Saving	a few seconds ago	
Index	11 minutes ago	1
Create an account	31 minutes ago	19

Items per page: 50 Showing 1-4 of 4 actions

Preview

go to Index

How can I help You?

Savings Account

go to Saving

Regular Savings Account

Kids Savings Account Zero Balance Account

Regular Savings Account

Use the up arrow for prior messages

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

### Actions

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

Name	Last edited	Example
Thank you!	14 minutes ago	
Saving	a few seconds ago	
Index	11 minutes ago	1
Create an account	31 minutes ago	19

Items per page: 50 Showing 1-4 of 4 actions

Preview

Great! Please take the following documents and head towards the nearest branch.

- 1.Aadhar Card
- 2.Pan Card
- 3.Passport Size Photos

Thanks

go to Thank you!

You're welcome!

Let me know if any other services I can do..

Yes No

Type something...

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

### Actions

Actions

Created by you

Set by assistant

Variables

Created by you

Set by assistant

Set by integration

Saved responses

Name	Last edited	Example
Thank you!	14 minutes ago	
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Items per page: 50 Showing 1-4 of 4 actions

Preview

Regular Savings Account

Kids Savings Account Zero Balance Account

Kids Savings Account

Great! Please take the following documents and head towards the nearest branch.

- 1.Aadhar Card
- 2.Pan Card
- 3.Passport size Photos
- 4.Guardians Aadhar Card

Use the up arrow for prior messages

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

### Actions

Actions

Created by you

Set by assistant

Variables

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Saved responses

Name	Last edited	Example
Thank you!	14 minutes ago	
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Items per page: 50 Showing 1-4 of 4 actions

Preview

go to Saving

Regular Savings Account

Kids Savings Account

Zero Balance Account

Zero Balance Account

Amazing! Please take the following documents and head towards the nearest branch.

1.Aadhar Card

2.Pan Card

3.Passport Size Photos

go to Thank you!

Type something...

**Note :** Attached preview contents of Savings account bot.