

# PROJECT DEVELOPMENT PHASE

## SPRINT-1

DATE	17 October 2022
TEAM ID	PNT2022TMID31628
PROJECT NAME	AI BASED DISCOURSE FOR BANKING INDUSTRY

The screenshot shows the IBM Cloud Catalog page for Watson Assistant. The page is titled "Watson Assistant" and includes a description: "Watson Assistant lets you build conversational interfaces into any application, device, or channel." The "Create" tab is selected, and the "Select a location" dropdown is set to "Dallas (us-south)". The "Select a pricing plan" section shows a table with the "Lite" plan, which is free and includes features like up to 1,000 unique monthly active users (MAUs) and up to 10,000 messages per month. The "Summary" sidebar on the right shows the plan details: "Watson Assistant", "Location: Dallas", "Plan: Lite", "Service name: Watson Assistant-np", and "Resource group: Default". There is a checkbox for "I have read and agree to the following license agreements:" and a "Create" button.

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

The screenshot shows the IBM Cloud Resource list page for Watson Assistant-np. The page is titled "Watson Assistant-np" and includes a status indicator "Active" and a link to "Add tags". The "Manage" tab is selected, and the "Start by launching the tool" section shows a "Launch Watson Assistant" button, a "Getting started tutorial" link, and an "API reference" link. The "Credentials" section shows the API key and URL. The "Plan" sidebar on the right shows the "Lite" plan and an "Upgrade" button.

Plan
Lite


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 ai

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.

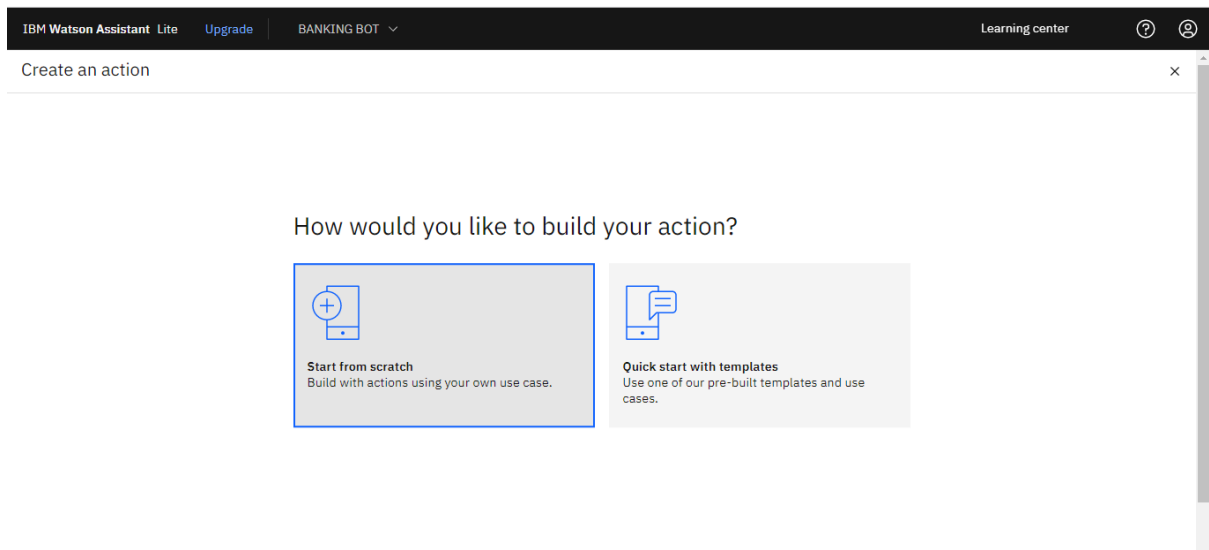
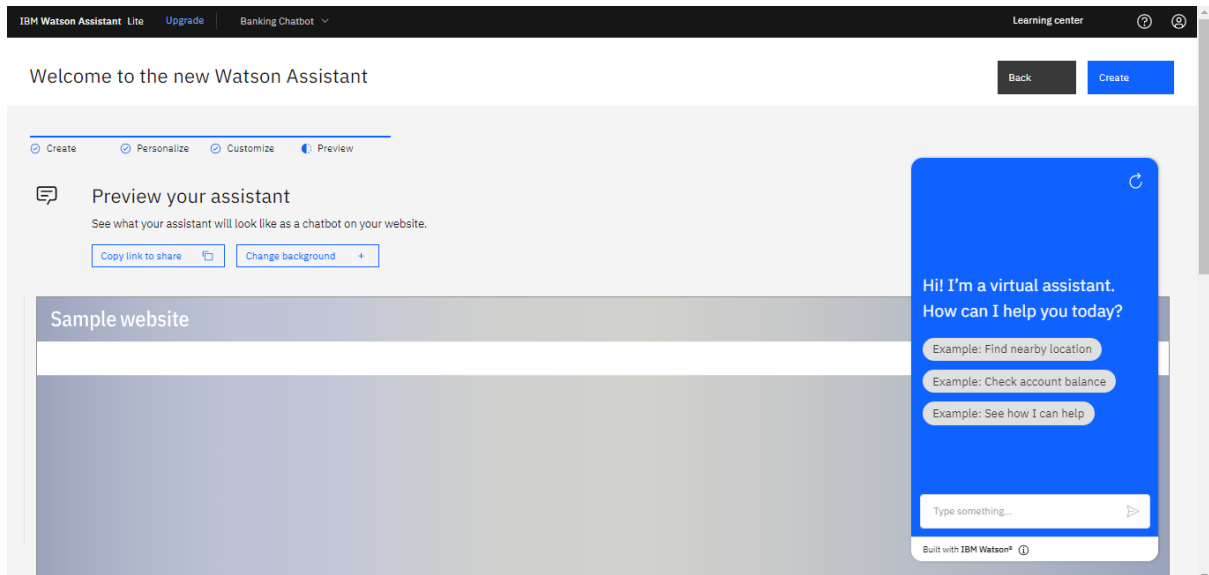
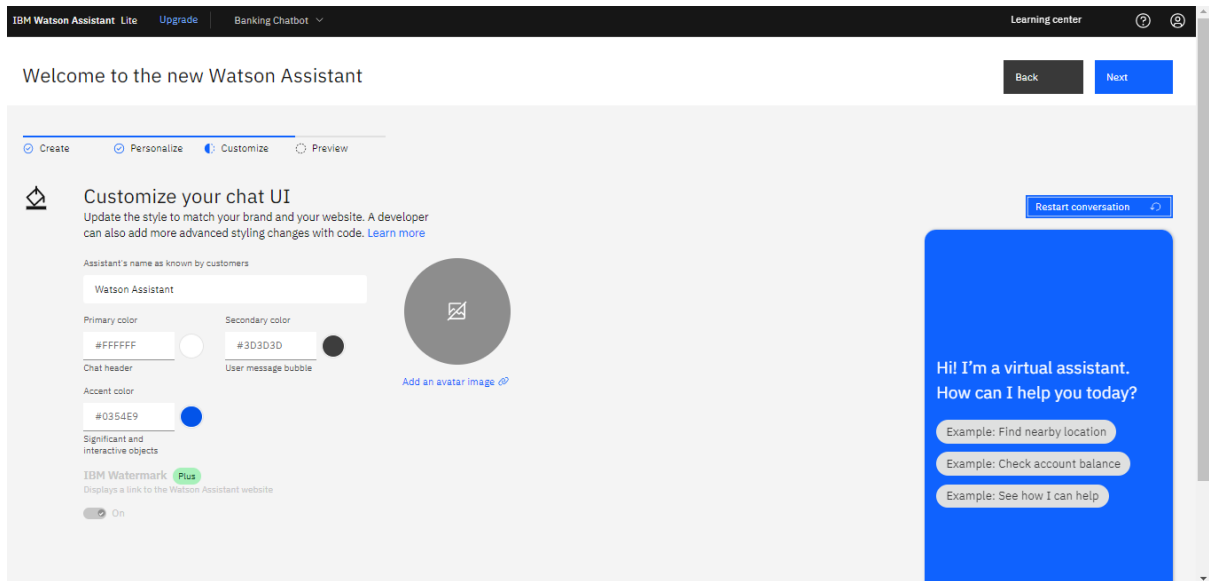
What size and color do you need?

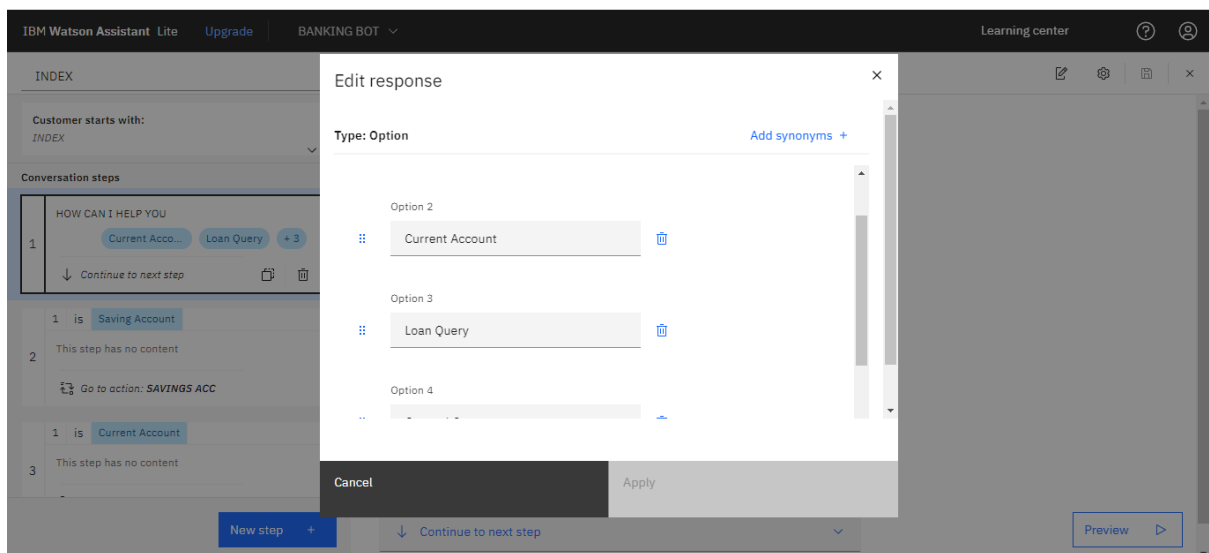
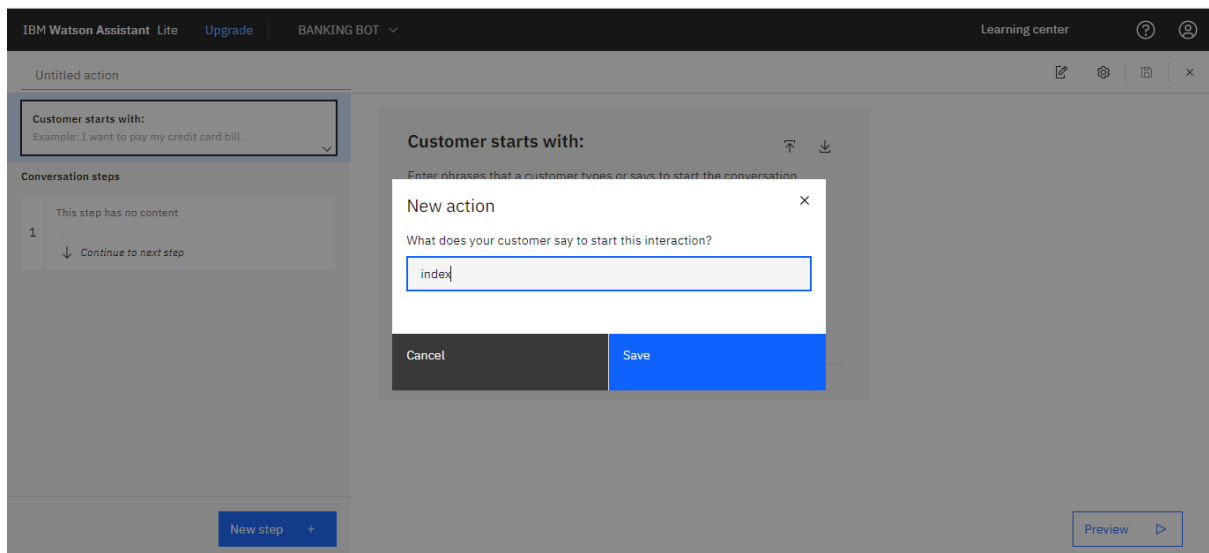
I'm looking for a size nine in white

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

INDEX

Conversation steps

1

HOW CAN I HELP YOU

Current Acco...Loan Query+ 3

Continue to next step

2

1 is Saving Account

This step has no content

Go to action: SAVINGS ACC

3

1 is Current Account

This step has no content

Go to action: CURRENT ACC

1

1 is Loan Query

New step +

Step 2 is takenwith 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

B I % ⌨ 🎧 🗣 📄 </>

For example: What type of transfer would you like to make?

Preview▶

IBM Watson Assistant LiteUpgradeBANKING BOTLearning center

SAVINGS ACC

Customer starts with:

how to create Family Saving Account

Conversation steps

1

This step has no content

Continue to next step

2

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

3

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 thisTotal: 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 LiteUpgradeBANKING BOTLearning center

SAVINGS ACC

Customer starts with:

how to create Family Saving Account

Conversation steps

1

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

2

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: OptionAdd synonyms +

Option 1

Regular Saving Account

Option 2

Zero Balance Saving Account

Option 3

Women's Saving Account

CancelApply

Continue to next step

Preview▶

IBM Watson Assistant LiteUpgradeBANKING BOTLearning center

SAVINGS ACC

Conversation steps

1

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

2

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

3

Carry originals and self-attested copies of the following documents while opening a new saving...

Go to action: END

New step +

Step 2 is takenwith conditions

Conditions

1 condition

IfAll of this is true:

1. Which type ...isRegular Saving Account

andAdd 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-attested copies for submission):

Preview

IBM Watson Assistant LiteUpgradeBANKING BOTLearning center

SAVINGS ACC

Conversation steps

1

is

Kids Saving Account

5

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

6

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

7

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 takenwith conditions

Conditions

1 condition

IfAll of this is true:

1. Which type ...isFamily Saving Account

andAdd 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-attested copies for submission):

Preview

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

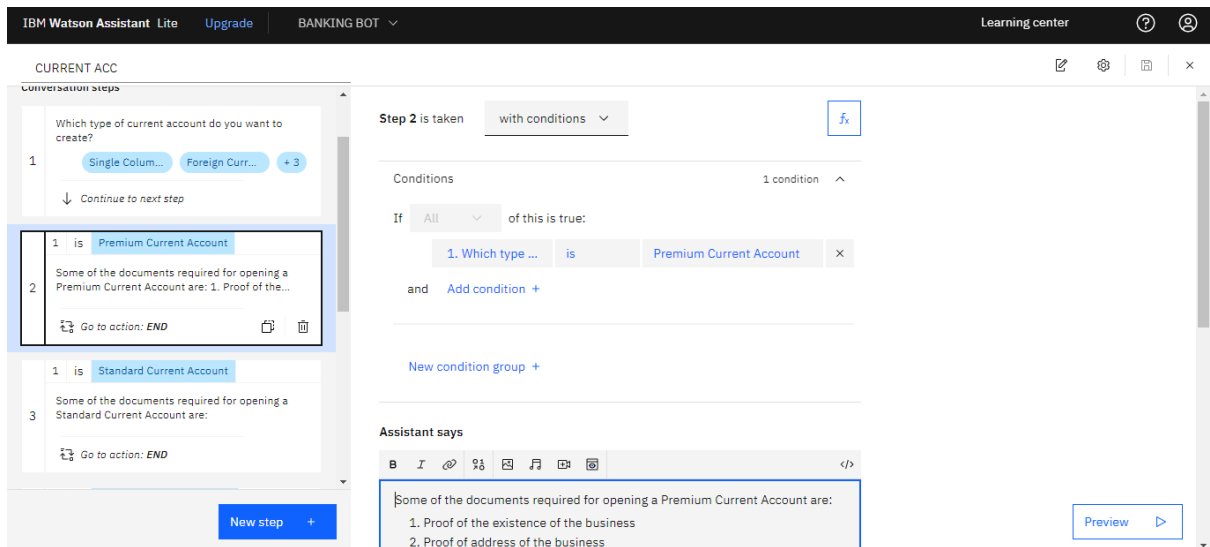
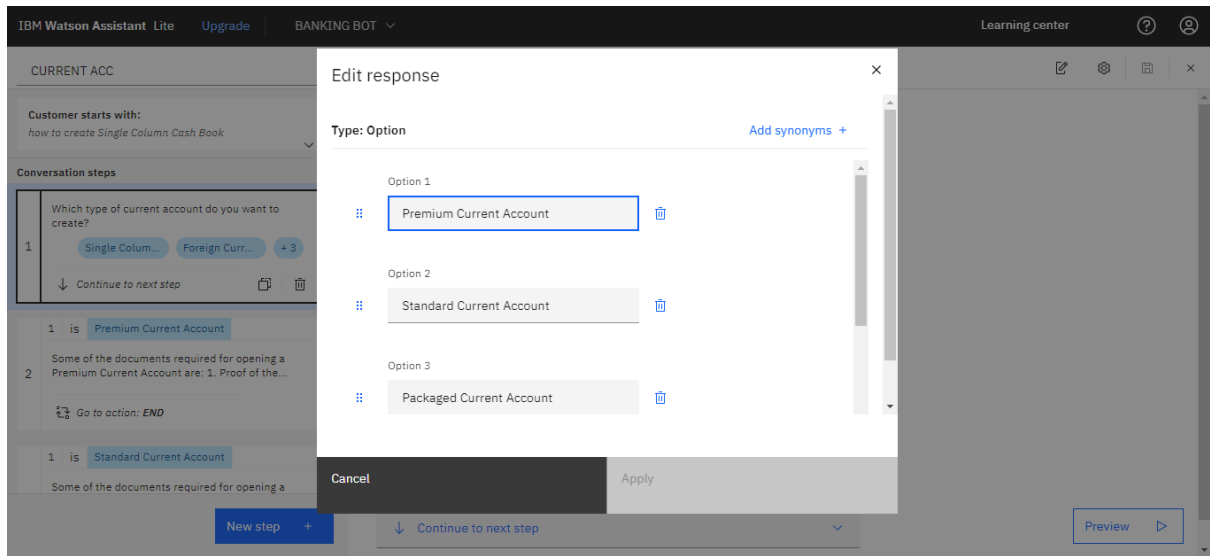
how to create Premium Current Account

how to create Standard Current Account

how to create Packaged Current Account

how to create Family Savings Account

Preview



IBM Watson Assistant LiteUpgradeBANKING BOTLearning 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 takenwith conditions

Conditions1 condition

IfAll of this is true:

1. Which type ... is Single Column Cash Book

andAdd condition +

New condition group +

Assistant says

B I @ % & # \$ % & # \$ % & # \$ % & # \$ % </>

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 LiteUpgradeBANKING BOTLearning center

END

Customer starts with:END

Conversation steps

Do You Want To Know About Some Other Services?

1NoYes

Continue to next step

1 is No

2Thank you. Have a Nice Day.

Continue to next step

1 is Yes

3This 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 actionTotal: 1

Enter a phrase

END

Preview▶

IBM Watson Assistant LiteUpgradeBANKING BOTLearning center

END

Customer starts with:END

Conversation steps

Do You Want To Know About Some Other Services?

1NoYes

Continue to next step

1 is No

2Thank you. Have a Nice Day.

Continue to next step

1 is Yes

3This step has no content

New step +

Step 1 is takenwithout conditions

Assistant says

B I @ % & # \$ % & # \$ % & # \$ % & # \$ % </>

Do You Want To Know About Some Other Services?

YesNo

Edit responseEdit validation

And then

Continue to next step

Preview▶



IBM Watson AssistantLifeUpgradeBANKING 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

f<sub>x</sub>

Conditions

1 condition

If All of this is true:

1. Do You Wa... is Yes

and Add condition +

New condition group +

Assistant says

B I % % % % % % % %

For example: What size do you want to order?

Preview

IBM Watson AssistantLifeUpgradeBANKING 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

f<sub>x</sub>

Conditions

1 condition

If All of this is true:

1. Do You Wa... is No

and Add condition +

New condition group +

Assistant says

B I % % % % % % % %

Thank you. Have a Nice Day.

Preview