

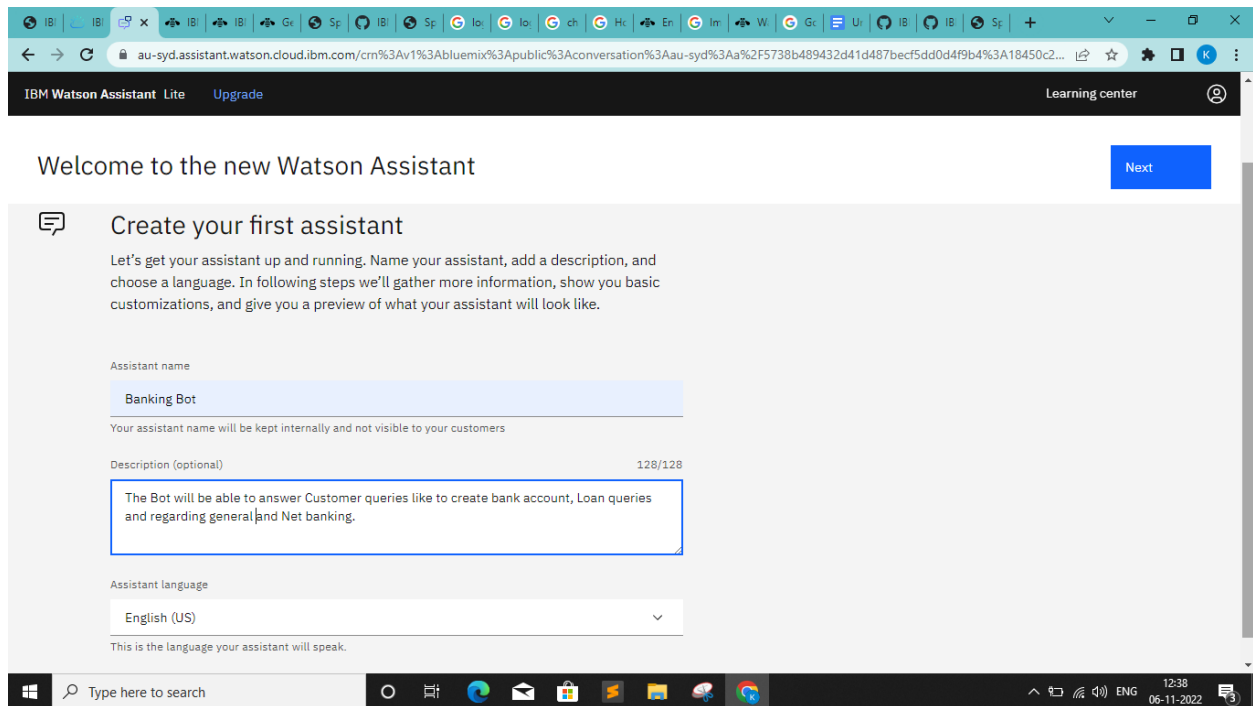
PROJECT DEVELOPMENT PHASE

SPRINT - 1

Date	05 November 2022
Team ID	PNT2022TMID24647
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 from watson.cloud.ibm.com. The page header includes 'IBM Watson Assistant Lite', an 'Upgrade' link, and a 'Learning center' link. The main heading is 'Welcome to the new Watson Assistant', with a blue 'Next' button to its right. Below this is a section titled 'Create your first assistant' with a speech bubble icon. The instructions state: '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 three main fields: 1. 'Assistant name' with a text input containing 'Banking Bot' and a note that the name is kept internally. 2. 'Description (optional)' with a text area containing 'The Bot will be able to answer Customer queries like to create bank account, Loan queries and regarding general and Net banking.' and a character count of 128/128. 3. 'Assistant language' with a dropdown menu set to 'English (US)' and a note that this is the language the assistant will speak. The Windows taskbar is visible at the bottom with the search bar and various application icons.

IBM Watson Assistant Lite Upgrade Learning center

Welcome to the new Watson Assistant

[Next](#)

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 Bot

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

Description (optional) 128/128

The Bot will be able to answer Customer queries like to create bank account, Loan queries and regarding general and Net banking.

Assistant language

English (US)

This is the language your assistant will speak.

Creating Loan Account Action :

The screenshot shows the IBM Watson Assistant interface for a 'Loan' action. The left sidebar displays the 'Conversation steps' for the 'Loan' action, which includes a sequence of steps for handling different loan types (Gold Loan, Education Loan, House Loan) and a 'Thank you!' response. The main area shows the 'Customer starts with:' section, which includes instructions on how to enter phrases that trigger the action. A 'Preview' button is visible at the bottom right of the main area.

Loan

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

Loan

Preview

The screenshot shows the IBM Watson Assistant interface for the 'Loan' action, specifically the configuration for Step 2. The left sidebar displays the 'Conversation steps' for the 'Loan' action, which includes a sequence of steps for handling different loan types (Topup Loan, Vehicle Loan, Education Loan) and a 'Thank you!' response. The main area shows the 'Step 2 is taken' section, which includes a 'Conditions' section where a condition is defined: 'If All of this is true: 1. What type ... is House Loan'. The 'Assistant says' section shows the response text: 'To be eligible for a house loan Please contact our bank service providers with all existing loan details'. A 'Preview' button is visible at the bottom right of the main area.

Loan

Step 2 is taken with conditions

Conditions 1 condition

If All of this is true:

1. What type ... is House Loan

and Add condition +

New condition group +

Assistant says

To be eligible for a house loan Please contact our bank service providers with all existing loan details

Preview

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	Count
Thank you!	36 minutes ago	6
Saving	an hour ago	4
Loan	6 minutes ago	1
Index	4 minutes ago	1
Current	38 minutes ago	2
Create an account	2 hours ago	19

Items per page: 50 Showing 1-6 of 6 actions

Preview

Loan Queries

go to Loan

What type of loan are you looking at?

House Loan

House Loan

To be eligible for a house loan Please contact our bank service providers with all existing loan details

Use the up arrow for prior messages

Create Current Acc...pdf Create Current Acc...pdf Create Savings Acc...pdf Show all

Type here to search

16:04 06-11-2022

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	Count
Thank you!	36 minutes ago	6
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Create an account	2 hours ago	19

Items per page: 50 Showing 1-6 of 6 actions

Preview

What type of loan are you looking at?

Vehicle Loan

Vehicle Loan

Kindly approach the bank with following Documents.

- 1.Automobile Invoice
- 2.Pan Card
- 3.Income tax returns of last 3 years

Use the up arrow for prior messages

Create Current Acc...pdf Create Current Acc...pdf Create Savings Acc...pdf Show all

Type here to search

16:04 06-11-2022

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Actions

Actions

Created by you

Set by assistant

Variables

Created by you

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Create an account	2 hours ago	19

Items per page: 50 Showing 1-6 of 6 actions

Preview

What type of loan are you looking at?

Gold Loan

Gold Loan

Please approach the bank with following Documents.

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

Use the up arrow for prior messages

Create Current Acc...pdf Create Current Acc...pdf Create Savings Acc...pdf Show all

Type here to search

16:05 06-11-2022

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	Count
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Create an account	2 hours ago	19

Items per page: 50 Showing 1-6 of 6 actions

Preview

go to Thank you!

You're welcome!

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

Yes No

No

Greet customer ended

Type something...

Create Current Acc...pdf Create Current Acc...pdf Create Savings Acc...pdf Show all

Type here to search

16:05 06-11-2022

Note : Attached preview contents of Loan account bot.