

PROJECT DEVELOPMENT PHASE

SPRINT - 3

Date	06 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 Lite 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 and a user profile icon. The main content area is titled 'Welcome to the new Watson Assistant' with a 'Next' button. Below this, a section titled 'Create your first assistant' provides instructions: '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 includes three fields: 'Assistant name' with the value 'Banking Bot', 'Description (optional)' with the text 'The Bot will be able to answer Customer queries like to create bank account, Loan queries and regarding general and Net banking.', and 'Assistant language' set to 'English (US)'. A note at the bottom states 'This is the language your assistant will speak.' The Windows taskbar is visible at the bottom of the screen.

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 General Query Action :

The screenshot displays the IBM Watson Assistant interface for configuring a General Query Action. The top navigation bar includes "IBM Watson Assistant Lite", "Upgrade", "Banking Bot", and "Learning center". The main workspace is divided into two panels: "Queries" on the left and "Assistant says" on the right.

Queries Panel:

- Customer starts with:** Queries
- Conversation steps:**
 - Step 1: "Select the general queries listed below" with a "CIBIL" button and a "+ 4" button. Below it is a "Continue to next step" button.
 - Step 2: "The bank is open all days from Monday to Saturday, from 9AM to 3PM, exceptions with 2n..." with a "Free text" button. Below it is a "Go to action: Thank you!" button.
 - Step 3: "1 is List of Branches" with a "Free text" button. Below it is a "Go to action: Thank you!" button.
- New step +** button at the bottom.

Assistant says Panel:

- Step 1 is taken** dropdown menu set to "without conditions".
- Assistant says** text area containing "Select the general queries listed below".
- Choose an option** dropdown menu.
- Edit response** and **Edit validation** buttons.
- And then** dropdown menu set to "Continue to next step".
- Preview** button with a play icon.

The bottom of the interface shows a task bar with icons for "Create Loan Accou...pdf", "Create Current Acc...pdf", "Create Current Acc...pdf", and "Create Savings Acc...pdf", along with a "Show all" button. The Windows taskbar at the very bottom shows the search bar and various application icons.

The screenshot displays the IBM Watson Assistant interface for configuring a General Query Action. The top navigation bar includes "IBM Watson Assistant Lite", "Upgrade", "Banking Bot", and "Learning center". The main workspace is divided into two panels: "Queries" on the left and "Assistant says" on the right.

Queries Panel:

- Customer starts with:** Queries
- Conversation steps:**
 - Step 3: "1 is Storage Locker Facility" with a "Free text" button. Below it is a "Go to action: Thank you!" button.
 - Step 4: "Arani, Arumbakkam, Chengalpattu, Chennai, Coimbatore, Cuddalore, Dharmapuri, Dindigul,..." with a "Free text" button. Below it is a "Go to action: Thank you!" button.
 - Step 5: "1 is Currency Conversion Facility" with a "Free text" button. Below it is a "Go to action: Thank you!" button.
- New step +** button at the bottom.

Assistant says Panel:

- Step 1 is taken** dropdown menu set to "without conditions".
- Assistant says** text area containing "Select the general queries listed below".
- Choose an option** dropdown menu.
- Edit response** and **Edit validation** buttons.
- And then** dropdown menu set to "Continue to next step".
- Preview** button with a play icon.

The bottom of the interface shows a task bar with icons for "Create Loan Accou...pdf", "Create Current Acc...pdf", "Create Current Acc...pdf", and "Create Savings Acc...pdf", along with a "Show all" button. The Windows taskbar at the very bottom shows the search bar and various application icons.

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Queries

5 All our banks have Currency conversion Facility. [Try Free text](#)

[Go to action: Thank you!](#)

1 is [CIBIL](#)

6 Banks, as part of their due diligence process, gauge the credit worthiness of individuals based... [Try Free text](#)

[Go to action: Thank you!](#)

1 is [Find a nearest branch](#)

7 Kindly reach out to our customer care executive. [Try Free text](#)

[Go to action: Thank you!](#)

[New step](#)

Step 1 is taken without conditions [fx](#)

Assistant says

Select the general queries listed below

Choose an option

[Edit response](#) [Edit validation](#)

And then

[Continue to next step](#)

[Preview](#)

Create Loan Accou...pdf Create Current Acc...pdf Create Current Acc...pdf Create Savings Acc...pdf [Show all](#)

Type here to search

16:55 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	Enquiries
Thank you!	an hour ago	6
Saving	2 hours ago	4
Queries	4 minutes ago	1
Loan	an hour ago	1
Index	3 minutes ago	1
Current	2 hours ago	2

Items per page: 50 Showing 1-7 of 7 actions

Preview

How can I help You?

User Enquiry

User Enquiry

go to [Queries](#)

Select the general queries listed below

Select an option

Type something...

Create Loan Accou...pdf Create Current Acc...pdf Create Current Acc...pdf Create Savings Acc...pdf [Show all](#)

Type here to search

16:57 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	Enquiries
Thank you!	an hour ago	6
Saving	2 hours ago	4
Queries	4 minutes ago	1
Loan	an hour ago	1
Index	3 minutes ago	1
Current	2 hours ago	2

Items per page: 50 Showing 1-7 of 7 actions

Preview

go to [Queries](#)

Select the general queries listed below

Bank Working Days

Bank Working Days

The bank is open all days from Monday to Saturday, from 9AM to 3PM, exceptions with 2nd Saturdays.

Type something...

Create Loan Accou...pdf

Create Current Acc...pdf

Create Current Acc...pdf

Create Savings Acc...pdf

Show all

Type here to search

1657 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	Enquiries
Thank you!	2 hours ago	6
Saving	2 hours ago	4
Queries	a few seconds ago	1
Loan	an hour ago	1
Index	6 minutes ago	1
Current	2 hours ago	2

Items per page: 50 Showing 1-7 of 7 actions

Preview

CIBIL

CIBIL

Banks, as part of their due diligence process, gauge the credit worthiness of individuals based on credit Scores. The information listed on your credit report includes several varieties that CIBIL uses to get your credit score. CIBIL score, therefore, reflects the extent of the probability of default. An individual's credit history is submitted to CIBIL for banks and financial institutions on a monthly basis.

Type something...

Create Loan Accou...pdf

Create Current Acc...pdf

Create Current Acc...pdf

Create Savings Acc...pdf

Show all

Type here to search

17:00 06-11-2022

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Actions

Created by you

Name	Last edited	Executed
Thank you!	2 hours ago	6
Saving	2 hours ago	4
Queries	a few seconds ago	1
Loan	an hour ago	1
Index	6 minutes ago	1
Current	2 hours ago	2

Items per page: 50 Showing 1-7 of 7 actions

Preview

List of Branches

- Arani, Arumbakkam, Chengalpattu, Chennai, Coimbatore, Cuddalore, Dharmapuri, Dindigul, Erode, Gingee, Gudiyatham, Jaipur, Kancheepuram, Kanyakumari, Karur, Kottakuppam, Krishnagiri, Kurinjipadi, Madagupatti, Madurai, Nagapattinam, Namakkal, Nilgiris, Palani, Palladam, Panakkam, Perambalur, Poigai, Pudukkottai, Ramanathapuram, Salem, Sholinghur, Sivaganga, Srivilliputtur, Thanjavur, Theni, Thiruvallur, Thiruvavur, Tiruchirappalli, Tirunelveli, Tiruvannamalai, Toothukudi, Udumalaipettai, Vellore, Villupuram and Virudhunagar.

Use the up arrow for prior messages

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

Type here to search

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Actions

Created by you

Name	Last edited	Executed
Thank you!	2 hours ago	6
Saving	2 hours ago	4
Queries	a few seconds ago	1
Loan	an hour ago	1
Index	6 minutes ago	1
Current	2 hours ago	2

Items per page: 50 Showing 1-7 of 7 actions

Preview

go to Queries

Select the general queries listed below

Find a nearest branch

Find a nearest branch

Kindly reach out to our customer care executive.

Contact us at @924xx78159

Use the up arrow for prior messages

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

Type here to search

Note : Attached preview contents of General Query bot.