

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. At the top, there's a navigation bar with 'IBM Watson Assistant Lite' and an 'Upgrade' button. Below this, a 'Welcome to the new Watson Assistant' message is displayed with a 'Next' button. The main section is titled 'Create your first assistant' and includes 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 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 bottom of the image shows a Windows taskbar with various application icons and a system clock indicating 12:38 on 06-11-2022.

Create Savings Account

The screenshot shows the IBM Watson Assistant interface for configuring a 'Saving' action. The top navigation bar includes 'IBM Watson Assistant', 'Lite', 'Upgrade', 'Banking Bot', and 'Learning center'. The main area is titled 'Saving' and contains a 'Customer starts with:' dropdown set to 'Saving'. Below this, the 'Conversation steps' section shows a single step with the instruction 'Continue to next step'. The right panel, 'Customer starts with:', provides instructions on how to enter phrases and a list of phrases: 'To create a new account', 'Account Creation', 'Savings Account', and 'Saving'. A 'New step' button is located at the bottom left of the main area.

The screenshot shows the IBM Watson Assistant interface for managing actions. The top navigation bar is the same as the previous screenshot. The main area is titled 'Actions' and contains a table listing actions created by the user. The table has columns for 'Name', 'Last edited', and 'Example'. The actions listed are 'Thank you!', 'Saving', 'Index', and 'Create an account'. A 'New action' button is located at the top right of the table. A preview window is open on the right, showing a conversation flow for the 'Savings Account' action. The preview includes a 'go to Index' link, a 'How can I help You?' prompt, a 'Savings Account' dropdown, and a 'Regular Savings Account' button. The bottom of the preview window shows a 'Use the up arrow for prior messages' instruction.

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

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

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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

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

Created by you

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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.