

PROJECT DEVELOPMENT PHASE

SPRINT - 1

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 is a section '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 fields are as follows:

- 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 showing 'English (US)'. Below it, a note states: 'This is the language your assistant will speak.'

The Windows taskbar is visible at the bottom, showing the search bar and various application icons. The system clock indicates 12:38 on 06-11-2022.

Creating General Query Action :

The screenshot displays the IBM Watson Assistant interface for creating a new 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. A blue button labeled 'CIBIL' and a '+4' button are visible. Below the list 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... A 'Free text' button is present. Below is a 'Go to action: Thank you!' button.
 - Step 3: 1 is List of Branches. Below is a 'Go to action: Thank you!' button.
- A 'New step +' button is at the bottom.

Assistant says Panel:

- Step 1 is taken:** without conditions
- Assistant says:** Select the general queries listed below. A rich text editor with various formatting options (B, I, link, etc.) is shown.
- Choose an option:** A dropdown menu is visible.
- Buttons:** 'Edit response', 'Edit validation', and a 'Preview' button with a play icon.
- And then:** Continue to next step

The bottom of the interface shows a task bar with icons for various applications and a search bar.

This screenshot shows the same IBM Watson Assistant interface, but with more steps completed in the 'Queries' panel.

Queries Panel:

- Step 3:** Free text. Below is a 'Go to action: Thank you!' button.
- Step 4:** 1 is Storage Locker Facility. Below the list are locations: Arani, Arumbakkam, Chengalpattu, Chennai, Coimbatore, Cuddalore, Dharmapuri, Dindigul,.... A 'Free text' button is present. Below is a 'Go to action: Thank you!' button.
- Step 5:** 1 is Currency Conversion Facility. Below the list is the text 'All our banks have Currency conversion Facility.' A 'Free text' button is present. Below is a 'Go to action: Thank you!' button.
- A 'New step +' button is at the bottom.

Assistant says Panel:

- Step 1 is taken:** without conditions
- Assistant says:** Select the general queries listed below. A rich text editor is shown.
- Choose an option:** A dropdown menu is visible.
- Buttons:** 'Edit response', 'Edit validation', and a 'Preview' button with a play icon.
- And then:** Continue to next step

The bottom of the interface shows the same task bar with icons and a search bar.

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Queries

Step 1 is taken without conditions

Assistant says

Select the general queries listed below

Choose an option

Edit response Edit validation

And then

Continue to next step

Preview

Create Loan Account...pdf Create Current Account...pdf Create Current Account...pdf Create Savings Account...pdf Show all

Type here to search

16:55 06-11-2022

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

Actions

Created by you

Name	Last edited	Items per page
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

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 Account...pdf Create Current Account...pdf Create Current Account...pdf Create Savings Account...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	Executed
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	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

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

The screenshot shows the IBM Watson Assistant interface. On the left, a sidebar lists 'Actions' with sub-categories: 'Created by you', 'Set by assistant', 'Variables', 'Created by you', 'Set by assistant', 'Set by integration', and 'Saved responses'. The main area displays a table of actions created by the user.

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

Below the table, it says 'Items per page: 50' and 'Showing 1-7 of 7 actions'. A preview window on the right shows a 'List of Branches' response with a list of locations in Tamil Nadu, including 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, Thiruvannamalai, Tiruchirappalli, Tirunelveli, Tiruvannamalai, Toothukudi, Udumalaipettai, Vellore, Villupuram, and Virudhunagar.

The screenshot shows the IBM Watson Assistant interface. On the left, a sidebar lists 'Actions' with sub-categories: 'Created by you', 'Set by assistant', 'Variables', 'Created by you', 'Set by assistant', 'Set by integration', and 'Saved responses'. The main area displays a table of actions created by the user.

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

Below the table, it says 'Items per page: 50' and 'Showing 1-7 of 7 actions'. A preview window on the right shows a 'Find a nearest branch' response. It includes a 'go to Queries' link, a prompt to 'Select the general queries listed below', a search bar with the text 'Find a nearest branch', and a button labeled 'Find a nearest branch'. Below this, it says 'Kindly reach out to our customer care executive. Contact us at @924xx78159'.

Note : Attached preview contents of General Query bot.