

# 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 an 'Upgrade' link. A 'Welcome to the new Watson Assistant' message is at the top right, with a 'Next' button. The main content area 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 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 set to 'English (US)'. Below it, a note states: 'This is the language your assistant will speak.'

The Windows taskbar at the bottom shows the search bar with 'Type here to search', several application icons, and the system clock displaying '12:38' and '06-11-2022'.

## Creating Net Banking Action :

The screenshot displays the IBM Watson Assistant interface for creating a 'Net Banking' action. The top navigation bar includes 'IBM Watson Assistant Lite', 'Upgrade', 'Banking Bot', and 'Learning center'. The main workspace is titled 'Net Banking' and shows a conversation flow with the following steps:

- Customer starts with:** Net Banking
- Conversation steps:**
  - Step 1: 'What queries do you have regarding Net Banking?' with a 'Continue to next step' action.
  - Step 2: 'What is Net Banking?' with a 'Free text' input and a 'Go to action: Thank you!' action.
  - Step 3: 'How do I register for Net Banking?' with a 'New step' button.

The right panel shows the 'Assistant says' section with a text input field and a 'Preview' button. The bottom toolbar contains document icons for 'Create General Qu...', 'Create Loan Accou...', 'Create Current Acc...', 'Create Current Acc...', and 'Create Savings Acc...', along with a 'Show all' button.

The screenshot displays the IBM Watson Assistant interface for creating a 'Net Banking' action. The top navigation bar includes 'IBM Watson Assistant Lite', 'Upgrade', 'Banking Bot', and 'Learning center'. The main workspace is titled 'Net Banking' and shows a conversation flow with the following steps:

- Conversation steps:**
  - Step 1: 'How do I register for Net Banking?' with a 'Free text' input and a 'Go to action: Thank you!' action.
  - Step 2: 'What are the features of Net Banking?' with a 'Free text' input and a 'Go to action: Thank you!' action.
  - Step 3: 'Facing errors in Net Banking?' with a 'New step' button.

The right panel shows the 'Assistant says' section with a text input field and a 'Preview' button. The bottom toolbar contains document icons for 'Create General Qu...', 'Create Loan Accou...', 'Create Current Acc...', 'Create Current Acc...', and 'Create Savings Acc...', along with a 'Show all' button.

IBM Watson Assistant Lite Upgrade Banking Bot Learning center

### Net Banking

requisition form and submit it to your home...  
Go to action: Thank you!

1 is What are the features of Net Banking?  
1)Check the account statement online.  
Go to action: Thank you!

1 is Facing errors in Net Banking  
Please contact our customer care executive or approach the closest branch.  
Go to action: Thank you!

Step 1 is taken without conditions

Assistant says

What queries do you have regarding Net Banking?

What is Net Banking? How do I register for Net Banking?  
What are the features of Net Banking? Facing errors in Net Banking

Edit response Edit validation

And then

Preview

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

Type here to search

17:27 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!	2 minutes ago	6
Saving	3 hours ago	4
Queries	29 minutes ago	1
Net Banking	5 minutes ago	1
Loan	2 hours ago	1
Index	3 minutes ago	1

Items per page: 50 Showing 1-8 of 8 actions

Preview

Net Banking

go to Net Banking

What queries do you have regarding Net Banking?

What is Net Banking? How do I register for Net Banking?  
What are the features of Net Banking? Facing errors in Net Banking

Type something...

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

Type here to search

17:29 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	Ex
Thank you!	2 minutes ago	6
Saving	3 hours ago	4
Queries	29 minutes ago	1
Net Banking	5 minutes ago	1
Loan	2 hours ago	1
Index	3 minutes ago	1

Items per page: 50 Showing 1-8 of 8 actions

Preview

What is Net Banking?

How do I register for Net Banking?

What are the features of Net Banking?

Facing errors in Net Banking?

What is Net Banking?

The facility offered by the bank allows customers to use banking services over the internet. Customers need not visit their bank's branch office to avail each and every small service.

Type something...

Create General Qu...pdf

Create Loan Accou...pdf

Create Current Acc...pdf

Create Current Acc...pdf

Create Savings Acc...pdf

Show all

Type here to search

17:29 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	Ex
Thank you!	2 minutes ago	6
Saving	3 hours ago	4
Queries	29 minutes ago	1
Net Banking	5 minutes ago	1
Loan	2 hours ago	1
Index	3 minutes ago	1

Items per page: 50 Showing 1-8 of 8 actions

Preview

What is Net Banking?

How do I register for Net Banking?

What are the features of Net Banking?

Facing errors in Net Banking?

How do I register for Net Banking?

Please download and fill up the net banking requisition form and submit it to your home branch.

Use the up arrow for prior messages

Create General Qu...pdf

Create Loan Accou...pdf

Create Current Acc...pdf

Create Current Acc...pdf

Create Savings Acc...pdf

Show all

Type here to search

17:30 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	Ex
Thank you!	2 minutes ago	6
Saving	3 hours ago	4
Queries	29 minutes ago	1
Net Banking	5 minutes ago	1
Loan	2 hours ago	1
Index	3 minutes ago	1

Items per page: 50 Showing 1-8 of 8 actions

Preview

What are the features of Net Banking?

Facing errors in Net Banking

What are the features of Net Banking?

- 1)Check the account statement online.
- 2)Open a fixed deposit account
- 3)Pay utility bills such as water bills and electricity bills
- 4)Make merchant payments

Type something...

Create General Qu...pdf Create Loan Accou...pdf Create Current Acc...pdf Create Current Acc...pdf Create Savings Acc...pdf Show all X

Type here to search

17:30 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	Ex
Thank you!	2 minutes ago	6
Saving	3 hours ago	4
Queries	29 minutes ago	1
Net Banking	5 minutes ago	1
Loan	2 hours ago	1
Index	3 minutes ago	1

Items per page: 50 Showing 1-8 of 8 actions

Preview

What queries do you have regarding Net Banking?

What is Net Banking?

How do I register for Net Banking?

What are the features of Net Banking?

Facing errors in Net Banking

Facing errors in Net Banking

Please contact our customer care executive or approach the closest branch.

Type something...

Create General Qu...pdf Create Loan Accou...pdf Create Current Acc...pdf Create Current Acc...pdf Create Savings Acc...pdf Show all X

Type here to search

17:31 06-11-2022

The screenshot displays the IBM Watson Assistant console interface. The top navigation bar includes 'IBM Watson Assistant', 'Lite', 'Upgrade', 'Banking Bot', and 'Learning center'. The main content area is titled 'Actions' and features a sidebar with categories: 'Actions' (subdivided into 'Created by you', 'Set by assistant', 'Variables', 'Created by you', 'Set by assistant', 'Set by integration', and 'Saved responses'), 'Variables', 'Created by you', 'Set by assistant', 'Set by integration', and 'Saved responses'.

The 'Actions' table lists the following items:

Name	Last edited	Count
Thank you!	2 minutes ago	6
Saving	3 hours ago	4
Queries	29 minutes ago	1
Net Banking	5 minutes ago	1
Loan	2 hours ago	1
Index	3 minutes ago	1

Below the table, it indicates 'Items per page: 50' and 'Showing 1-8 of 8 actions'.

A 'Preview' window is open on the right, showing a chatbot conversation. The messages are:

- go to [Thank you!](#)
- You're welcome!
- Let me know if any other services I can do..
- Buttons: Yes, No
- Response: No
- Thanks! Have a Nice Day.
- Greet customer ended

The bottom of the screen shows a Windows taskbar with the search bar and various application icons. The system clock indicates 17:31 on 06-11-2022.

**Note :** Attached preview contents of Net Banking Query bot.