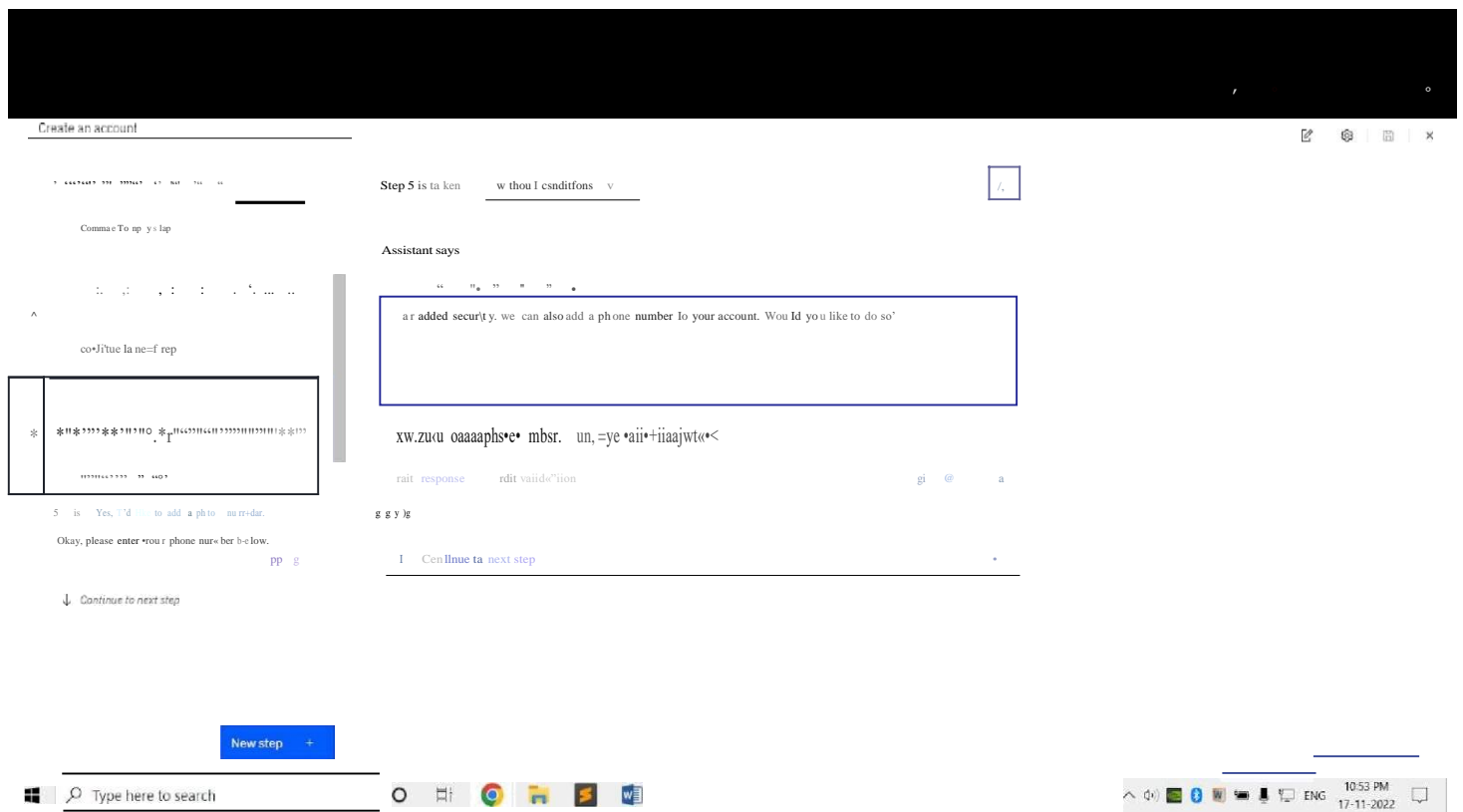


# CREATING SKILLS AND ASSISTANT FOR CHATBOT

TEAM ID	PNT2022TMID44746
PROJECT NAME	AI Based Discourse for Banking Industry
DATE	27 <sup>th</sup> October,2022

## 1. Creating Current Account Action



IBM Watson Assistant LiteUpgradeBanking ChatBot

Learning center

No, my email will do just fine.

Continue to

Continue to next step

No

member

Looking for your...

confirmation

Continue to next step

New stop

6. Okay, please enter your \*\*phon...

5. For added security, we can also ...

New condition group

will proceed with creating your account.  
please provide your \*\*first name

Edit validation

Type here to search

10:53 PM 17-11-2022

IBM Watson Assistant LiteUpgradeBanking ChatBot

Learning center

Yes, I'd like to add a phone

Continue to next step

Continue to next step

9 is NO

12

9 is Yes 10 is Yes

You did it! Your new account is being created and you will receive an email confirmation shortly. 4...

Free text

Action complete

New stop

You did it! Your new account is being created and you will receive an email confirmation shortly.  
Welcome!

User enters free text

Preview

Type here to search

10:54 PM 17-11-2022

Action: Transfer Funds

IBM Watson Assistant Lite Upgrade Banking ChatBot Learning center

### Transfer funds

Customer starts with:  
I need to transfer funds

Conversation steps

- Before we can transfer any funds, please confirm where you'd like to transfer funds from.  
1 is: **Checking account** **Savings account**  
Continue to next step
- Transfers from savings accounts must be made over the phone. <br /> Please give us a call at +1 (800)...  
2 is: **Confirmation**  
Continue to next step
- Okay! How much would you like to transfer?  
3 is: **Currency**  
Continue to next step
- Transfers over \$10,000 must be made with a live agent.  
4 is: **10000**  
Continue to next step

New step +

Enter phrases your customer might use to start this action Total: 18

Enter a phrase

- Transfer to checking
- transfer to another account
- transfer money from one card to another
- transfer money from my savings account
- transfer money
- Transfer funds between my accounts
- Transfer funds

Preview

Type here to search

11:02 PM 17-11-2022

IBM Watson Assistant Lite Upgrade Banking ChatBot Learning center

### Transfer funds

Customer starts with:  
I need to transfer funds

Conversation steps

- Before we can transfer any funds, please confirm where you'd like to transfer funds from.  
1 is: **Checking account** **Savings account**  
Continue to next step
- Transfers from savings accounts must be made over the phone. <br /> Please give us a call at +1 (800)...  
2 is: **Confirmation**  
Continue to next step
- Okay! How much would you like to transfer?  
3 is: **Currency**  
Continue to next step
- Transfers over \$10,000 must be made with a live agent.  
4 is: **10000**  
Continue to next step

New step +

Assistant says

Transfers over \$10,000 must be made with a live agent.

Define customer response

And then

Connect to agent (action ends)

Preview

Type here to search

11:02 PM 17-11-2022

IBM Watson Assistant interface showing a workflow for transferring funds. The left pane displays the conversation flow with steps 7 through 11. Step 9 is highlighted, showing a confirmation message: "Sounds good. Just to confirm - you'd like to transfer Step 3 from your checking account into ...". The right pane shows the configuration for Step 9, which is taken with conditions. The conditions are: If Any of this is true: 8. Great, I found you in our system... is Account Bx01974917-01, or 8. Great, I found you in our system... is Account Cx01974917-02. The Assistant says section shows the response: "Sounds good. Just to confirm - you'd like to transfer Step 3. Okay! How much would you like to tra from your checking account into 8. Great, I found you in our system... on 5. Alright. When would you like to make ...". The And then section shows the action: Continue to next step.

IBM Watson Assistant interface showing a workflow for transferring funds. The left pane displays the conversation flow with steps 9 through 13. Step 13 is highlighted, showing a confirmation message: "Great! Let me process this for you. You will receive a confirmation email in the next 2-3 minutes...". The right pane shows the configuration for Step 13, which is taken with conditions. The conditions are: If Any of this is true: 9. Sounds good, Just to confirm - y... is Yes, or 11. Sounds good, Just to confirm - ... is Yes. The Assistant says section shows the response: "Great! Let me process this for you. You will receive a confirmation email in the next 2-3 minutes once the transfer is complete." The And then section shows the action: End the action.