

# PROJECT DEVELOPMENT PHASE

## Sprint 1

Date	10 November 2022
Team ID	PNT2022TMID35481
Project Name	AI Based Discourse for Banking Industry

### CREATING IBM WATSON ASSISTANT:

Creating the assistant and setting the location as Dallas (us-south) – Watson Assistant 35481

The screenshot shows the IBM Cloud Watson Assistant creation page. The interface is dark-themed. At the top, there's a navigation bar with 'IBM Cloud', a search bar, and user account information. The main content area is divided into a left sidebar, a central workspace, and a right summary panel. The sidebar lists various service details like 'Type: Service', 'Provider: IBM', 'Last updated: 11/02/2022', 'Category: AI / Machine Learning', 'Compliance: EU Supported, HIPAA Enabled, IAM-enabled', and 'Location: Sydney, Frankfurt, London, Tokyo, Washington DC, Dallas'. The central workspace has tabs for 'Create' and 'About'. Under 'Create', there are sections for 'Select a location' (with a dropdown menu showing 'Dallas (us-south)') and 'Select a pricing plan' (with a table of plans). The 'Lite' plan is selected, showing features like 'Up to 1,000 unique monthly active users (MAUs) chatting with your assistant' and 'Up to 10,000 messages per month'. The pricing is 'Free'. The right summary panel shows 'Watson Assistant' with 'Location: Dallas', 'Plan: Lite', 'Service name: Watson Assistant-c0', and 'Resource group: Default'. There's a checkbox for 'I have read and agree to the following license agreements:' and a 'Create' button.

Plan	Features	Pricing
Lite	Everything you need to get started, free for as long as you need it Up to 1,000 unique monthly active users (MAUs) chatting with your assistant Up to 10,000 messages per month --- Features --- - World-class conversational AI with Watson - Make your website assistant your own with Webchat - deploy Webchat in minutes, or use our fully extensible architecture - Bootstrap your assistant by using some of our prebuilt content - Connect to any application or database with a prebuilt integration,	Free

### Launching the assistant

The screenshot shows the IBM Cloud Watson Assistant management page for 'Watson Assistant-35481'. The interface is dark-themed. At the top, there's a navigation bar with 'Resource list /' and the assistant name 'Watson Assistant-35481' with a green 'Active' status and an 'Add tags' link. The main content area is divided into a left sidebar, a central workspace, and a right summary panel. The sidebar lists various service details like 'Service credentials', 'Plan', and 'Connections'. The central workspace has a section 'Start by launching the tool' with a 'Launch Watson Assistant' button, a 'Getting started tutorial' link, and an 'API reference' link. Below this is a 'Credentials' section with a 'Download' button, a 'Show credentials' button, and a text input field for the 'API key'.

Plan	Features	Pricing
Lite	Everything you need to get started, free for as long as you need it Up to 1,000 unique monthly active users (MAUs) chatting with your assistant Up to 10,000 messages per month --- Features --- - World-class conversational AI with Watson - Make your website assistant your own with Webchat - deploy Webchat in minutes, or use our fully extensible architecture - Bootstrap your assistant by using some of our prebuilt content - Connect to any application or database with a prebuilt integration,	Free

## Customizing the assistant

### Welcome to the new Watson Assistant



#### 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 Chatbot

Your assistant name will be kept internally and not visible to your customers

Description (optional)

109/128

A chatbot designed for answering queries related to banking  
Project - AI BASED DISCOURSE FOR BANKING INDUSTRY

Assistant language

English (US)



This is the language your assistant will speak.



#### Personalize your assistant

##### Tell us where your assistant will live

We will create your first channel integration for you, which will be visible on your dashboard. You can always add more or change later.

Where do you plan on deploying your assistant?

Web



##### Tell us about yourself

This information will be used to personalize your onboarding experience.

Which industry do you work in?

Banking and financial services



What is your role on the team building the assistant?

Project manager or scrum master



Which statement describes your needs best?

I'm using Watson Assistant to complete a course or certification



This is what your customers will experience



Watson Assistant



Do you have the Speed Demons in stock?

The Speed Demons are in stock at our Downtown and Northgate locations, which are both within five miles of you.

What size and color do you need?

I'm looking for a size nine in white

Great news! The Speed Demons are available in white in a size 9.

You can purchase them for curbside pick up or we can ship them to you. Which would you prefer?

I'll pick them up!

Ship them to me, please!



## CREATING ACTIONS

The chatbot is created using the assistant. For the chatbot to do its job, certain actions are to be created. We have first started with the simple greetings action

### i) GREETINGS ACTION:

Greetings

Customer starts with:

Hey

Conversation steps

1

Greetings! Good to see you.

↓ Continue to next step

Customer starts with:

Enter phrases that a customer types or says to start the conversation about a specific topic. These phrases determine the task, problem, or question your customer has.

The more phrases you enter, the better your assistant can recognize what the customer wants.

Enter phrases your customer might use to start this action Total: 4

Enter a phrase

Hi

Hello

Greetings

Hey

Greetings

Customer starts with:

Hey

Conversation steps

1

Greetings! Good to see you.

↓ Continue to next step

Step 1 is taken

without conditions

f<sub>x</sub>

Assistant says

B I [link] [code] [image] [audio] [video] [table] [code]

Greetings! Good to see you.

Define customer response

And then

↓ Continue to next step

## ii) NATURE OF QUERY

This action helps the customer to navigate to the action which will help in answering their query.

Nature of Query

Customer starts with:  
Example: I want to pay my credit card bill.

Conversation steps

1

How can I be of assistance to you?

Savings Acco... Current Acco... + 3

↓ Continue to next step

Step 1 is taken without conditions

fx

Assistant says

B I % & # @

How can I be of assistance to you?

Choose an option

Edit response Edit validation

And then

↓ Continue to next step

### Edit response

Type: Option

Add synonyms +

- Option 1

⋮

Savings Account

🗑
- Option 2

⋮

Current Account

🗑
- Option 3

⋮

Loan Account

🗑
- Option 4

Cancel

Apply

### iii) END TASK

This action helps the customer to either redirect them to get answers for another query or will end the conversation.

End

Customer starts with:  
Example: I want to pay my credit card bill.

Conversation steps

1

Would you like to know about the other services?

Yes No

Continue to next step

2

1 is Yes

This step has no content

Go to action: Nature of Query

3

1 is No

Thank you. Have a pleasant day!!!

Action complete

Customer starts with:

Enter phrases that a customer types or says to start the conversation about a specific topic. These phrases determine the task, problem, or question your customer has.

The more phrases you enter, the better your assistant can recognize what the customer wants.

Enter phrases your customer might use to start this action

Example: I want to pay my credit card bill.

Total: 0

Qn) Would you like to know about the other services?

Edit response



Type: Option

Add synonyms +

Option 1

Yes

Option 2

No

Option 3

Example: Savings account

Cancel

Apply

If “Yes”

Step 2 is taken

with conditions

$f_x$

Conditions

1 condition

If All of this is true:

1. Would you like to know ...

is

Yes

x

and Add condition

New condition group

Settings

x

Go to another action

Go to

Nature of Query

x

v

☐ End this action after the other action is completed

Cancel

Apply

If “No”

Step 3 is taken

with conditions ▾

f<sub>x</sub>

Conditions

1 condition ▴

If

All ▾

of this is true:

1. Would you like to know ...

is

No

×

and [Add condition +](#)

[New condition group +](#)

Assistant says

B

I

</>

Thank you. Have a pleasant day!!!

#### iv) SAVINGS ACCOUNT

This action helps the customer in answering all queries related to the savings account service available at the bank.

Savings

Customer starts with:  
Savings

Conversation steps

1

Which type of savings account do you want to create?

Salary saving... Regular savin... + 4

Continue to next step

2

1 is Regular savings account

Great!! Kindly take the following documents and visit the nearest branch:

Go to action: End

3

1 is Kids savings account

Great!! Kindly take the following documents and visit the nearest branch:

Go to action: End

1 is Salary savings account

Great!! Kindly take the following documents and

New step +

Customer starts with:

Enter phrases that a customer types or says to start the conversation about a specific topic. These phrases determine the task, problem, or question your customer has.

The more phrases you enter, the better your assistant can recognize what the customer wants.

Enter phrases your customer might use to start this action

Total: 1

Enter a phrase

Savings

Qn) Which type of savings account do you want to create?

#### Edit response

Enter a list of options or pull from a variable to generate a dynamic list of options. [Learn more](#)

Dynamic **Beta** ⓘ



[Add synonyms +](#)

Option 1

Regular savings account

Option 2

Kids savings account

Option 3

Zero Balance savings account

Option 4

Family savings account

Option 5



If “Regular Savings Account”, then

New condition group +

Assistant says

Great!! Kindly take the following documents and visit the nearest

- Aadhar Card
- Pan card
- Passport size photos
- Address proof(Utility bill, etc)

Define customer response

And then

Continue to next step

If “Salary Savings Account”, then

Assistant says

Great!! Kindly take the following documents and visit the nearest branch:

- Aadhar Card
  - Pan card
  - Passport size photos
  - Address proof(Utility bill, etc)
  - Income Proof

Define customer response

And then

Go to another action

Goes to action End

If “Family Savings Account”, then

**Assistant says**

**B** *I*

Great!! Kindly take the following documents and visit the nearest branch:

- Aadhar Card
  - Pan card
  - Passport size photos
  - Address proof(Utility bill, etc)
  - Ration card

Define customer response

**And then**

Go to another action

Goes to action

End

## PREVIEW

Preview

Hi

Greetings recognized

Greetings! Good to see you.

go to Nature of Query

What type of query you need to be addressed?

Select an option ^

Current savings

Savings account

Loan account

General Query

Net Banking

Type something...

Preview

Savings account

go to Savings

Which type of savings account do you want to create?

Select an option ^

Regular savings account

Kids savings account

Zero Balance savings account

Family savings account

Senior citizen savings account

Salary savings account

Use the up arrow for prior messages

Kids savings account

Kids savings account

Great!! Kindly take the following documents and visit the nearest branch:

- Aadhar Card(child and parent/guardian)
  - Pan card(child and parent/guardian)
  - Passport size photos( of both child and parent/guardian)
  - Address proof(Utility bill, etc)
  - Birth Certificate of child

go to [End](#)

Would you like to know about the other services?

- Pan card(child and parent/guardian)
- Passport size photos( of both child and parent/guardian)
- Address proof(Utility bill, etc)
- Birth Certificate of child

go to [End](#)

Would you like to know about the other services?

Yes

No

No

Thank you. Have a pleasant day!!!

◇ There are no additional steps for this action.  
Add a new step or end the action.

[Greetings](#) ended