CREATING SKILLS AND ASSISTANT FOR CHATBOT

TEAM ID	PNT2022TMID05100
PROJECT NAME	AI Based Discourse for Banking Industry
DATE	27th October,2022

1. Creating Current Account Action

IBM Watson Assistant Lite   Upgrade   Banking ChatBot ⌄   Learning center ? ⊙

Create an account

Continue to next step

5 is No, my email will do just fine.

7 No problem, let's keep going!
   ↓ Continue to next step

8 Finally, I'll also need your date of birth in MMDDYYYY format. This will also serve as your 8-... 📅 Date
   ↓ Continue to next step

9 6 is Defined
   5 is Yes, I'd like to add a phone number.
   Thanks! Does the following information look correct? If so, I will proceed with creating your... Confirmation
   ↓ Continue to next step 🗐 🗑

10 6 is not Defined
   5 is No, my email will do just fine.
   Thanks! Does the following information look correct? If so, I will proceed with creating your... Confirmation
   ↓ Continue to next step

11 9 is No   10 is No
   Sorry about that. Let's try this again.

New step +

Step 9 is taken   with conditions ⌄   ƒₓ

Conditions   2 conditions ⌃

If Any ⌄ of this is true:

   6. Okay, please enter your **phon...   is   defined   ×
or 5. For added security, we can also ...   is   Yes, I'd like to add a phone number. ×
or Add condition +

New condition group +

Assistant says

B I ⊘ ⅑ ⊠ ♫ ⊡ ▣   </>

Thanks! Does the following information look correct? If so, I will proceed with creating your account.
• Name: 3. Thanks! Now, enter your **last name.* , 2. First, please provide your **first name
• Email Address: 4. Awesome. I'll also need an email addr
• Phone Number: 6. Okay, please enter your **phone** **r
• Birthday: 8. Finally, I'll also need your **date of bi

Yes   No

View response   Edit validation   ⚙ ⇄ 🗑

And then   Preview ▷

Create an account

8 📅 Date
   ↓ Continue to next step

9 6 is Defined
   5 is Yes, I'd like to add a phone number.
   Thanks! Does the following information look correct? If so, I will proceed with creating your... Confirmation
   ↓ Continue to next step

10 6 is not Defined
   5 is No, my email will do just fine.
   Thanks! Does the following information look correct? If so, I will proceed with creating your... Confirmation
   ↓ Continue to next step

11 9 is No   10 is No
   Sorry about that. Let's try this again.
   ↰ Re-ask previous step(s)

12 9 is Yes   10 is Yes
   You did it! Your new account is being created and you will receive an email confirmation shortly. <... Tᴛ Free text
   ⊘ Action complete 🗐 🗑

New step +

Step 12 is taken   with conditions ⌄   ƒₓ

Conditions   2 conditions ⌃

If Any ⌄ of this is true:

   9. Thanks! Does the following info...   is   Yes   ×
or 10. Thanks! Does the following inf...   is   Yes   ×
or Add condition +

New condition group +

Assistant says

B I ⊘ ⅑ ⊠ ♫ ⊡ ▣   </>

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

Welcome!

                                                    User enters free text

Edit response   Edit validation   ⚙ ⇄ 🗑

And then

⊘ End the action   ⌄

                                                              Preview ▷

Action: Transfer Funds

us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F51b3e95662424692b19abc1c264d069b%3Aad6b5d18-45b8-4aa...

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Learning center

Transfer funds

Customer starts with:
I need to transfer funds

Conversation steps

1
Before we can transfer any funds, please confirm where you'd like to transfer funds from.
Checking acc...   Savings acco...
↓ Continue to next step

2
1 is Savings account
Transfers from savings accounts must be made over the phone.
 Please give us a call at +1 (800)...
Confirmation
↓ Continue to next step

3
1 is Checking account
Okay! How much would you like to transfer?
Currency
↓ Continue to next step

4
3 ≥ 10000
Transfers over $10,000 must be made with a live agent.

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: 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 ENG

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us-south.assistant.watson.cloud.ibm.com/crn%3Av1%3Abluemix%3Apublic%3Aconversation%3Aus-south%3Aa%2F51b3e95662424692b19abc1c264d069b%3Aad6b5d18-45b8-4aa...

IBM **Watson Assistant** Lite   Upgrade   Banking ChatBot ∨

Learning center

Transfer funds

2
Transfers from savings accounts must be made over the phone.
 Please give us a call at +1 (800)...
Confirmation
↓ Continue to next step

3
1 is Checking account
Okay! How much would you like to transfer?
Currency
↓ Continue to next step

4
3 ≥ 10000
Transfers over $10,000 must be made with a live agent.
↻ Connect to agent

5
3 < 10000
Alright. When would you like to make the transfer?
📅 Date
↓ Continue to next step

6
Okay, I'll need to authenticate you before moving forward.
 What's the email address associat...
Regex

New step +

Step 4 is taken   with conditions ∨ f_x

Conditions   1 condition ∧

If   All ∨   of this is true:

    3. Okay! How much would...   >=   10000   ×

and   Add condition +

New condition group +

Assistant says

B I ∂ % ⊠ ♫ ⊡ ⊡   </>

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 ENG

IBM Watson Assistant Lite   Upgrade | Banking ChatBot ⌄   Learning center   ⑦   ⑧

Transfer funds   ✎ ⚙ ▣ ✕

or PIN code.

7   🔢 Regex
↓ Continue to next step

Great, I found you in our system! \
 Finally, to which account would you like to transfer to?
8   A different ac...   Account Bx0...   +1
↓ Continue to next step

Step 9 is taken   with conditions ⌄ f_x

8 is   Account Bx0197491' , Account Cx019...

Sounds good. Just to confirm - you'd like to transfer Step 3 from your checking account into ...
9
Confirmation
↓ Continue to next step   ⧉ 🗑

Conditions   2 conditions ⌃

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   ✕

or   Add condition +

New condition group +

Assistant says

B I 🔗 🔢 🖼 ♫ ▣ ▦   \</>

Sounds good. Just to confirm - you'd like to transfer 3. Okay! How much would you like to tra from your **checking account** into 8. Great, I found you in our system! \<br , on 5. Alright. When would you like to make .

Is that correct?

Yes   No

View response   Edit validation   ⚙ ⇄ 🗑

And then

↓ Continue to next step   ⌄

8 is   A different account

Alright. Please enter the full account number below.
10
Tᴛ Free text
↓ Continue to next step

8 is   A different account

Sounds good. Just to confirm - you'd like to transfer Step 3 from your Step 1 into...
11
Confirmation
↓ Continue to next step

New step +   Preview ▷

Second screenshot (bottom):

IBM Watson Assistant Lite   Upgrade | Banking ChatBot ⌄   Learning center   ⑦   ⑧

Transfer funds   ✎ ⚙ ▣ ✕

Sounds good. Just to confirm - you'd like to transfer Step 3 from your checking account into ...
9
Confirmation
↓ Continue to next step

Step 13 is taken   with conditions ⌄ f_x

8 is   A different account

Alright. Please enter the full account number below.
10
Tᴛ Free text
↓ Continue to next step

Conditions   2 conditions ⌃

If   Any ⌄   of this is true:

9. Sounds good. Just to confirm - y...   is   Yes   ✕

or   11. Sounds good. Just to confirm - ...   is   Yes   ✕

or   Add condition +

New condition group +

8 is   A different account

Sounds good. Just to confirm - you'd like to transfer Step 3 from your Step 1 into...
11
Confirmation
↓ Continue to next step

Assistant says

B I 🔗 🔢 🖼 ♫ ▣ ▦   \</>

Great! Let me process this for you.

You will receive a confirmation email in the next 2-3 minutes once the transfer is complete.

9 is No   11 is No

Let's try that again.
12
↩ Re-ask previous step(s)

👤 Define customer response   ⌄

9 is Yes   11 is Yes

Great! Let me process this for you. \
 You will receive a confirmation email in the next 2-3...
13
⊘ Action complete   ⧉ 🗑

And then

⊘ End the action   ⌄

New step +   Preview ▷