

Project Report

on

**Intelligent Customer
Helpdesk with Smart
Document Understanding**

in

Artificial Intelligence

by

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Intelligent Customer Help Desk with Smart Document Understanding

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1. Introduction

Overview

We will build a chatbot that uses various Watson AI Services (Watson Discovery, Watson Assistant, Watson Cloud Functions and Node-Red) to deliver an effective Web based UI through which we can chat with the assistant.

We will integrate the Watson Discovery service with Watson Assistant using webhooks.

- Project Requirements : Node-RED, IBM Cloud, IBM Watson, Node JS
- Functional Requirements : IBM Cloud
- Technical Requirements : AI, ML, Watson AI, Node JS
- Software Requirements : Watson Assistant, Watson Discovery, Watson Cloud Functions, Node-RED
- Project Deliverables : Intelligent Chatbot with Smart Document Understanding
- Project Team : Jasmine Glani Mathias
- Project Duration : 19Days

Purpose

The typical customer care chatbot can answer simple questions, such as store locations and hours, directions, and maybe even making appointments. When a question falls outside of the scope of the pre- determined question set, the option is typically to tell the customer the question isn't valid or offer to speak to a real person.

In this project, there will be another option. If the customer question is about the operation of a device, the application shall pass the question onto Watson Discovery Service, which has been pre-loaded with the device's owners manual. So now, instead of "Would you like to speak to a customer representative?" we can return relevant sections of the owners manual to help solve our customers' problems. So unless and until customer specifically asks for a customer representative the bot will try to solve all your queries.

To take it a step further, the project shall use the Smart Document Understanding feature of Watson Discovery to train it on what text in the owners manual is important and what is not. This will improve the answers returned from the queries. Then using Watson actions as webhook, Watson Discovery can be integrated with Watson assistant. Finally using Node-Red, Watson assistant can be integrated with a web UI. This UI can then be used to connect with Watson assistant and chat with it

Scope of Work

- Create a customer care dialog skill in Watson Assistant
- Use Smart Document Understanding to build an enhanced Watson Discovery collection
- Create an IBM Cloud Functions web action that allows Watson Assistant to post queries to WatsonDiscovery
- Build a web application with integration to all these services & deploy the same on IBM CloudPlatform

2. Literature Survey

Existing Problem

The typical customer care chatbot can answer simple questions, such as store locations and hours, directions, and maybe even making appointments. When a question falls outside of the scope of the pre-determined question set, the option is typically to tell the customer the question isn't valid or offer to speak to a real person.

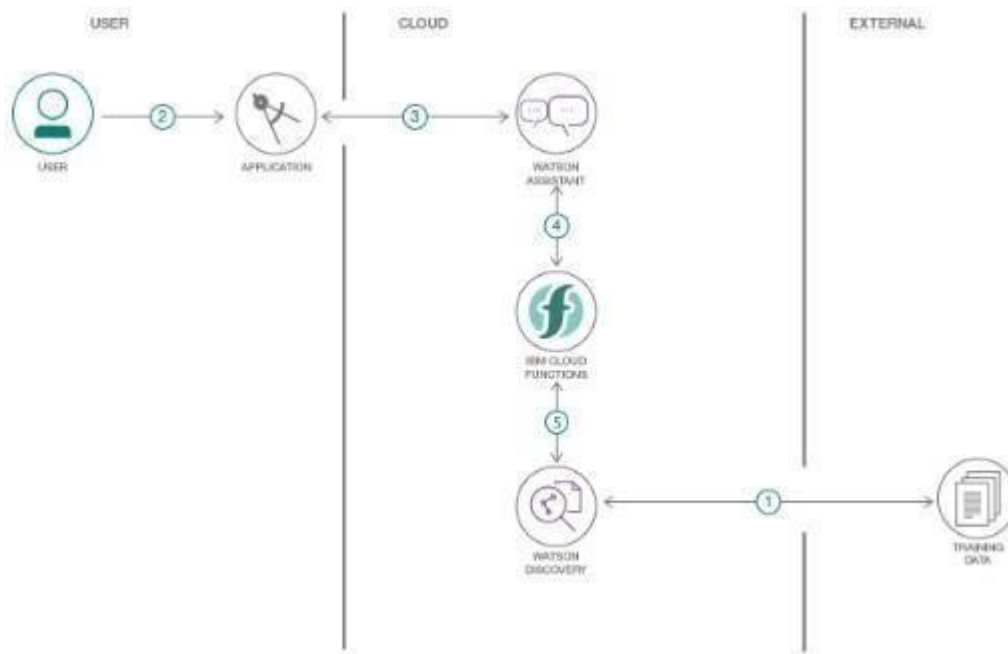
Proposed Solution

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3. Theoretical Analysis

Block / FlowDiagram



Hardware /Software Designing

1. Create necessary Watson Services.
2. Configure Watson Discovery.
3. Create Watson Cloud Functions Action.
4. Configure Watson Assistant.
5. Integrate Watson Discovery with Watson Assistant using webhook.
6. Build Node-RED flow to integrate Watson Assistant and Web Dashboard.

4. Experimental Investigation

Student Dashboard x Node-RED Dashboard x +

node-red-vmuln.eu-gb.mybluemix.net/ui/#/1?socketid=lrDgfPTnlhqdXjPUAACH

CUSTOMERCARE

CHATBOT

form

Enter the input*

hii

SUBMIT CANCEL

You hii

bot

hello...

Student Dashboard x Node-RED Dashboard x +

node-red-vmuln.eu-gb.mybluemix.net/ui/#/1?socketid=lrDgfPTnlhqdXjPUAACH

CUSTOMERCARE

CHATBOT

form

Enter the input*

how to configure remainders and alerts

SUBMIT CANCEL

You how to configure remainders and alerts

bot

"Select Main Menu > Reminders & Alerts > Preferences 2. Configure each reminder/alert setting as required. On Web: 1. Select Reminders & Alerts tile. 2. Select Preferences. 3. Configure each reminder/alert setting as required."

Student Dashboard x Node-RED Dashboard x +

node-red-vmuln.eu-gb.mybluemix.net/ui/#/1?socketid=lrDgFPtNlhqdXjPUAACh

CUSTOMERCARE

CHATBOT

form

Enter the input *

how to customize the brightness of your ecobee3 screen

SUBMIT CANCEL

You ^{bot} how to customize the brightness of your ecobee3 screen

"You can customize the brightness of your ecobee3's screen. The brightness for both the active and standby screens can be configured independently. You can also configure the screen to automatically sleep (i.e. turn off) whenever your ecobee3 enters the Sleep activity period."

Student Dashboard x Node-RED Dashboard x +

node-red-vmuln.eu-gb.mybluemix.net/ui/#/1?socketid=lrDgFPtNlhqdXjPUAACh

CUSTOMERCARE

CHATBOT

form

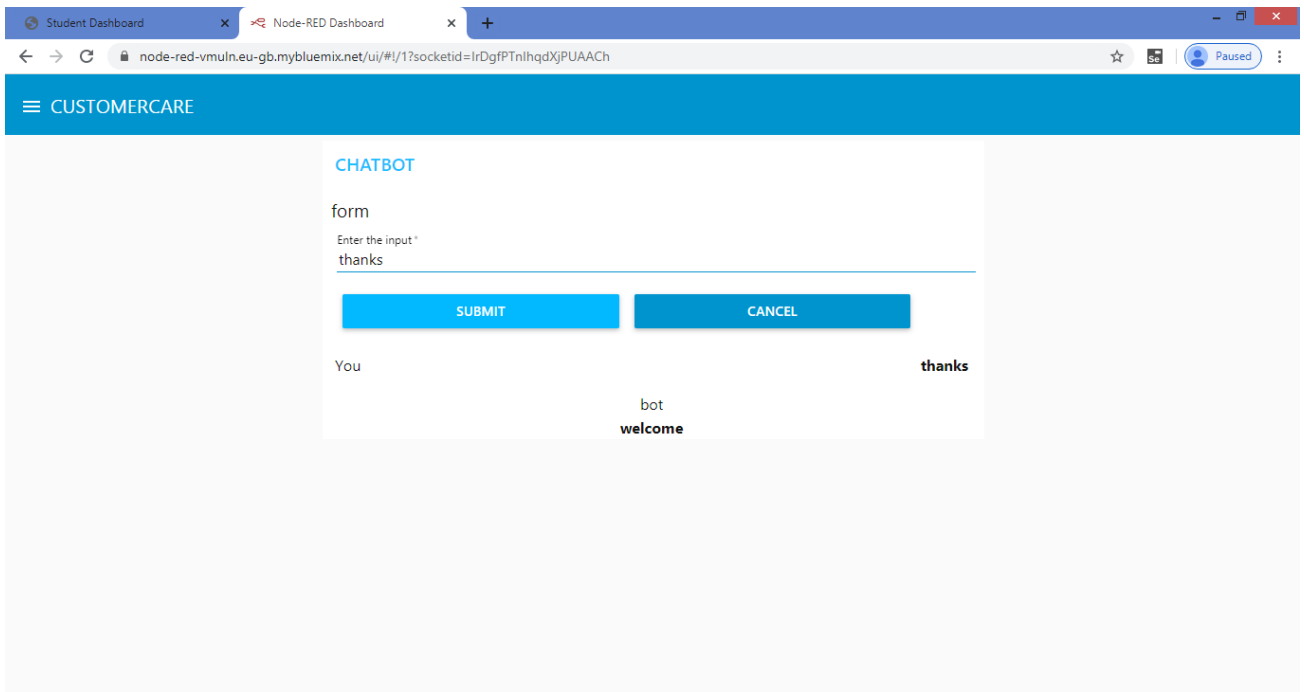
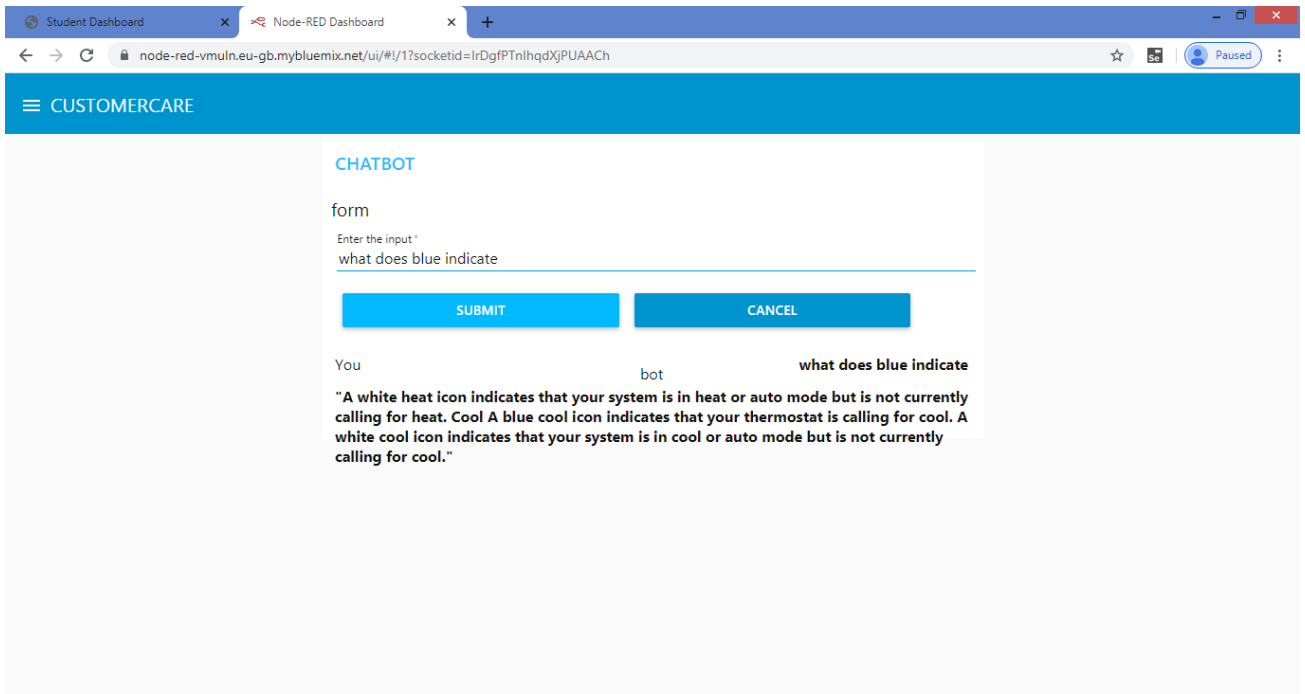
Enter the input *

how to maintain sufficient indoor air quality

SUBMIT CANCEL

You ^{bot} how to maintain sufficient indoor air quality

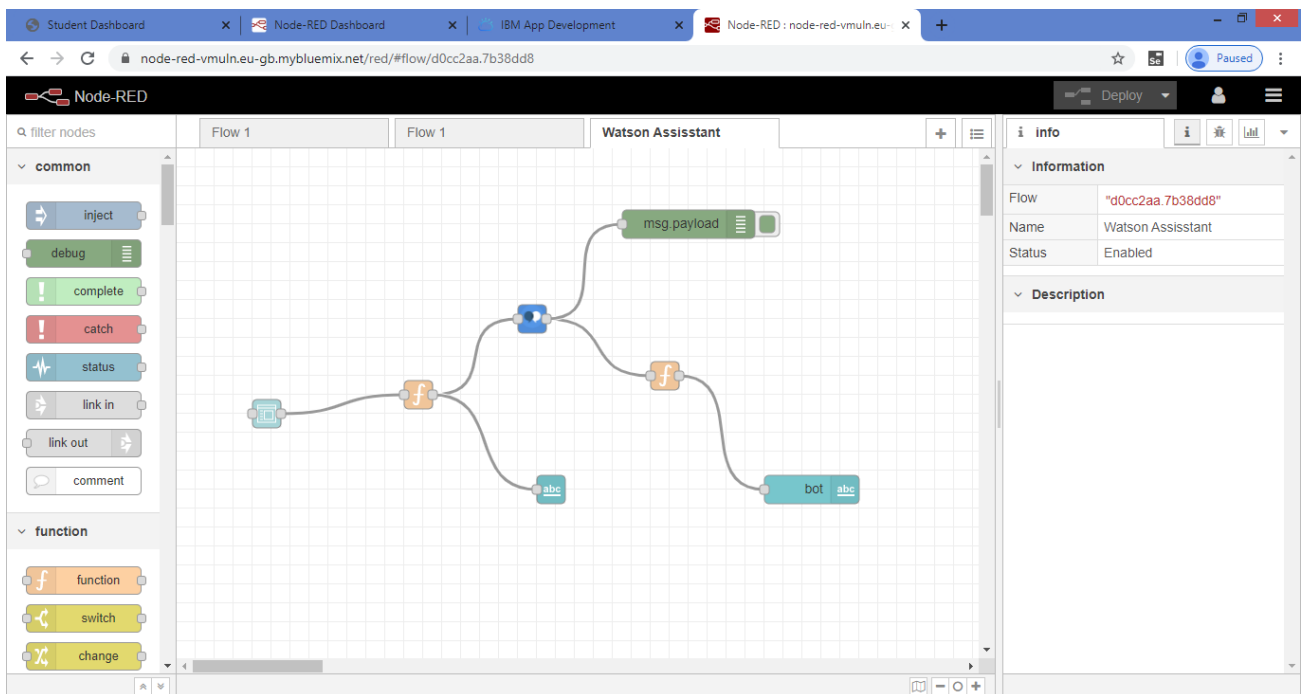
"The amount of indoor air required to maintain sufficient indoor air quality depends on how big your house is, how many people live there, and the capacity of your ventilation device. You should consult with a local contractor who can guide you on how often you should be running your ventilation device."



5. Flowchart

Insert the following nodes into the flow in Node-RED.

- Debug
- ui_Form
- ui_Text
- ui_Button
- Function
- Assistant



5. Results

Web based UI was developed by integrating all the services using Node- RED.

URL for UI Dashboard : <https://node-red-vmuln.eu-gb.mybluemix.net/ui/>

6. Advantages & Disadvantages

Advantages

1. Reduces Man Power
2. Cost Efficient
3. Less and less calls will be diverted to Customer Representatives.

Disadvantages

1. Sometimes it can mislead customers as it tries to search irrelevant information in the manual.
2. It may also give same answers to different queries.

7. Applications

1. This chatbot can be deployed to various websites as it can solve a lot of basic questions.
2. It can be used to deploy as Customer Helpdesk for small scale products as their manual usually has the solution for the user's problems.

8. Conclusion

An Intelligent Customer Helpdesk Chatbot was created using various Watson services like Watson Discovery, Watson Assistant, Watson Cloud Functions and Node-RED.

9. Future Scope

In the future, various other Watson services like Text-To-Speech and Speech-To-Text can be integrated in the chatbot. This can make the chatbot Hands-free.

10. Bibliography

1. Node-RED Starter Application :

<https://developer.ibm.com/tutorials/how-to-create-a-node-red-starter-application/>

2. Build your own AI assistant : _ _

<https://www.youtube.com/watch?v=hitUOFNne14>

3. Howtouse Watson Assistant with Webhooks: _ _

<https://www.youtube.com/embed/5z3i5IsBVnk>

4. Watson Discovery : <https://developer.ibm.com/articles/introduction-watson-discovery/>

Appendix

Source Code

Node-RED Flow code

```
[{"id":"d0cc2aa.7b38dd8","type":"tab","label":"Watson Assistant","disabled":false,"info":"","wires":[["d28fbde2.01349","68a89e45.6e17a"]],{"id":"d28fbde2.01349","type":"watson-conversation-v1","z":"d0cc2aa.7b38dd8","name":"Assistant","workspaceid":"2c6dcb63-e75e-40f0-a70a-d778734e20ae","multiuser":false,"context":true,"empty-payload":false,"service-endpoint":"https://api.eu-gb.assistant.watson.cloud.ibm.com/instances/0e6e7676-99e6-4746-8865-e402a345b249","timeout":"","optout-learning":false,"x":375,"y":180,"wires":[["5a1ddeaa.c8b31","c82dfe80.746c8"]],{"id":"1fd2b4f0.ae9c3b","type":"function","z":"d0cc2aa.7b38dd8","name":"F1","func":"msg.payload = msg.payload.text; \nreturn msg;","outputs":1,"noerr":0,"x":255,"y":260,"wires":[["d28fbde2.01349","68a89e45.6e17a"]],{"id":"10de05bb.f5f62a","type":"ui_form","z":"d0cc2aa.7b38dd8","name":"","label":"form","group":"98dc448a.a0d2c8","order":1,"width":0,"height":0,"options":{"label":"Enter the input","value":"text","type":"text","required":true,"rows":null},"formValue":{"text":"","payload":"","submit":"submit","cancel":"cancel","topic":"","x":95,"y":280,"wires":[["1fd2b4f0.ae9c3b"]],{"id":"5a1ddeaa.c8b31","type":"function","z":"d0cc2aa.7b38dd8","name":"F2","func":"if(msg.payload.output.error){\n  msg.payload = \"please rephrase\";\n  return msg;\n}\nmsg.payload = msg.payload.output.text[0];\nreturn msg;","outputs":1,"noerr":0,"x":515,"y":240,"wires":[["e09b69a4.7bc4a8"]],{"id":"68a89e45.6e17a","type":"ui_text","z":"d0cc2aa.7b38dd8","group":"98dc448a.a0d2c8","order":3,"width":0,"height":0,"name":"","label":"You","format":"{{msg.payload}}","layout":"row-spread","x":395,"y":360,"wires":[],{"id":"e09b69a4.7bc4a8","type":"ui_text","z":"d0cc2aa.7b38dd8","group":"98dc448a.a0d2c8","order":6,"width":0,"height":0,"name":"","label":"bot","format":"{{msg.payload}}","layout":"col-center","x":670,"y":360,"wires":[],{"id":"c82dfe80.746c8","type":"debug","z":"d0cc2aa.7b38dd8","name":"","active":true,"tosidebar":true,"console":false,"tostatus":false,"complete":"false","x":540,"y":80,"wires":[],{"id":"98dc448a.a0d2c8","type":"ui_group","z":"","name":"CHATBOT","tab":"baba0a5f.1ad358","order":1,"disp":true,"width":13,"collapse":false},{"id":"baba0a5f.1ad358","type":"ui_tab","z":"","name":"CUSTOMERCARE","icon":"","disabled":false,"hidden":false}]}
```

Watson Cloud Function Action Code

```
/**
 *
 * @param {object} params
 * @param {string} params.iam_apikey
 * @param {string} params.url
 * @param {string} params.username
 * @param {string} params.password
 * @param {string} params.environment_id
 * @param {string} params.collection_id
 * @param {string} params.configuration_id
 * @param {string} params.input
 *
 * @return {object}
 */

const assert = require('assert');
const DiscoveryV1 = require('watson-developer-cloud/discovery/v1');

/**
 *
 * main() will be run when you invoke this action
 *
 * @param Cloud Functions actions accept a single parameter, which must be a JSON object.
 *
 * @return The output of this action, which must be a JSON object.
 */
function main(params) {
  return new Promise(function (resolve, reject) {

    let discovery;

    if (params.iam_apikey){
      discovery = new DiscoveryV1({
        'iam_apikey': params.iam_apikey,
        'url': params.url,
        'version': '2019-03-25'
      });
    }
    else {
      discovery = new DiscoveryV1({
        'username': params.username,
        'password': params.password,
        'url': params.url,
        'version': '2019-03-25'
      });
    }
  });
}
```



```
}

discovery.query({
  'environment_id': params.environment_id,
  'collection_id': params.collection_id,
  'natural_language_query': params.input,
  'passages': true,
  'count': 3,
  'passages_count': 3
}, function(err, data) {
  if (err) {
    return reject(err);
  }
  return resolve(data);
});
});
}
```