

# Oracle MOOC: Oracle Intelligent Bots

Session 1

## Meet a Chatbot

In this lab, you'll examine, explore, and test a financial banking chatbot. The chatbot, called MasterBot, allows users to find balances in their banking accounts, transfer money between banking accounts, and send money to different people and accounts.

## Before You Begin

To complete the labs, you will need the Bot UI URL for the instance of Oracle Intelligent Bots that you'll use throughout this course. This URL is listed in your account information.

**Note:** Some features in the UI don't render well in Internet Explorer (IE), so open the Bot UI URL in another web browser, like Firefox.

### Chatbot MOOC Account Setup

#### Account Information for John.Smith@example.com

Domain	<b>gse00012256</b>
Bot UI URL	<b><a href="http://198.51.100.1:8080/botsui/bot">http://198.51.100.1:8080/botsui/bot</a></b>
Bot Resource URL	<b><a href="http://198.51.100.1:8888">http://198.51.100.1:8888</a></b>
Bot Resource Username	<b>MyTestUser</b>
Bot Resource Password	<b>MyTestPassword</b>
Ngrok URL	<b><a href="https://1a2b3c4d.ngrok.io">https://1a2b3c4d.ngrok.io</a> -&gt; localhost:8800</b>

To help you build your chatbots, you will use a set of files that contain code that's referenced in the instructions. These files are contained in the `labfiles.zip` file, which is located in the Set Up page. Before beginning this exercise, download and unzip this file. Save it to a convenient place, because you'll be referring to it throughout this course.

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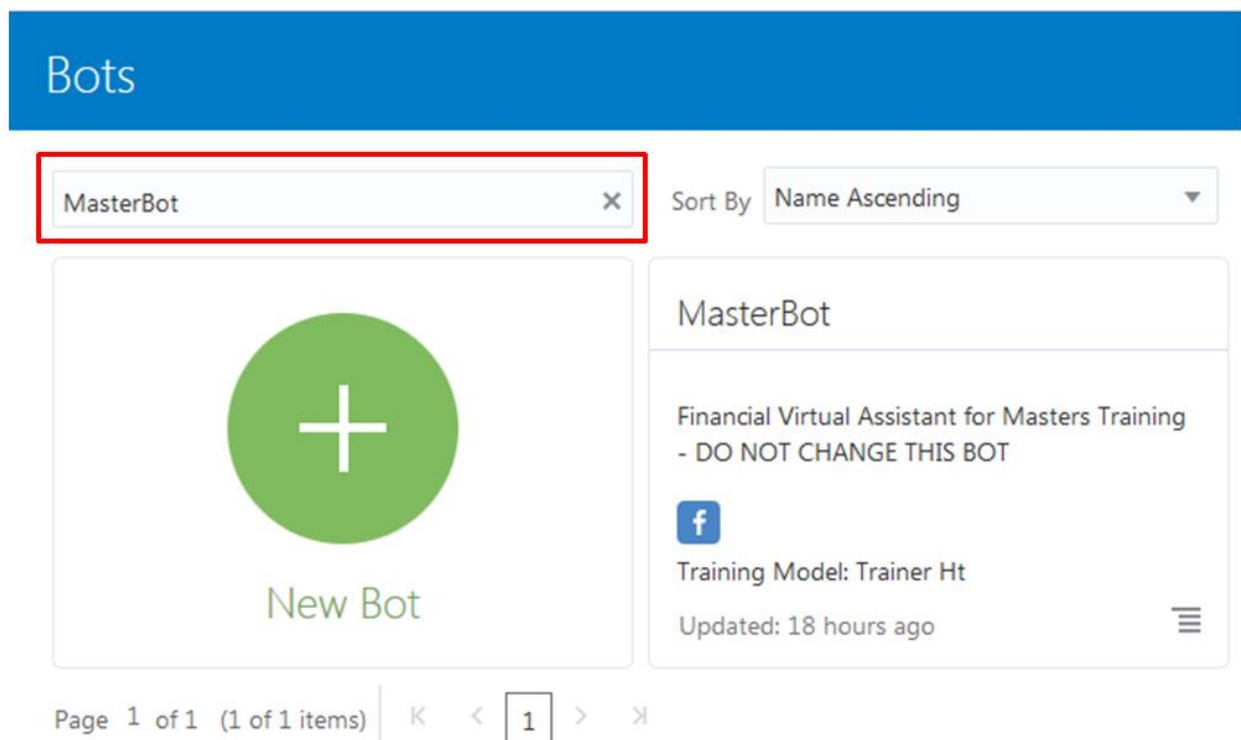
## Step 1: Test the Get Balance Function

In this section, you'll take a look at a banking chatbot named MasterBot. This is a complete chatbot that you will reconstruct during the course. In this section, you will focus on testing its Get Balance function.

1. Open your instance of Oracle Intelligent Bots. For example, open `http://198.51.100.1:8080/bosui/bot`.

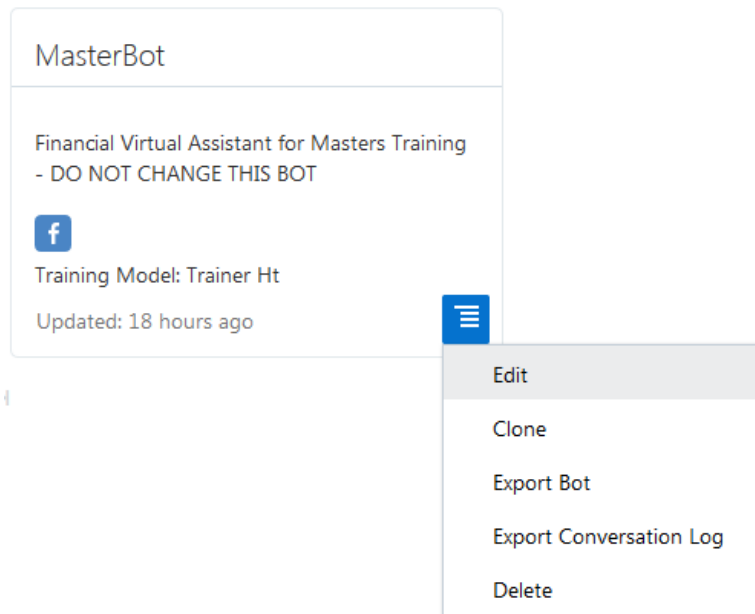
The landing page appears. It displays a catalog of the chatbots that were created on this instance.

2. In the Filter field, enter MasterBot.

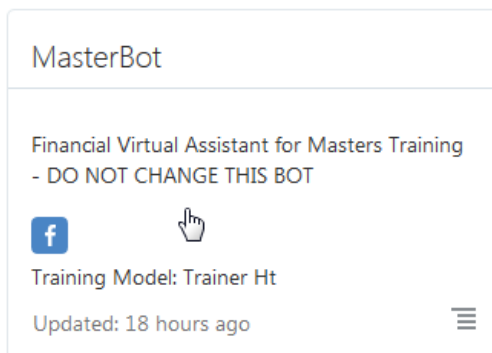


**Note:** If you ever need to clone, export, or delete the chatbot, you can find these functions from the drop down hamburger menu located in the lower right of the tile. You can also extract a log of this chatbot's previous conversations for future reference. You won't need to use these functions now, but just know they are here when you do need them.

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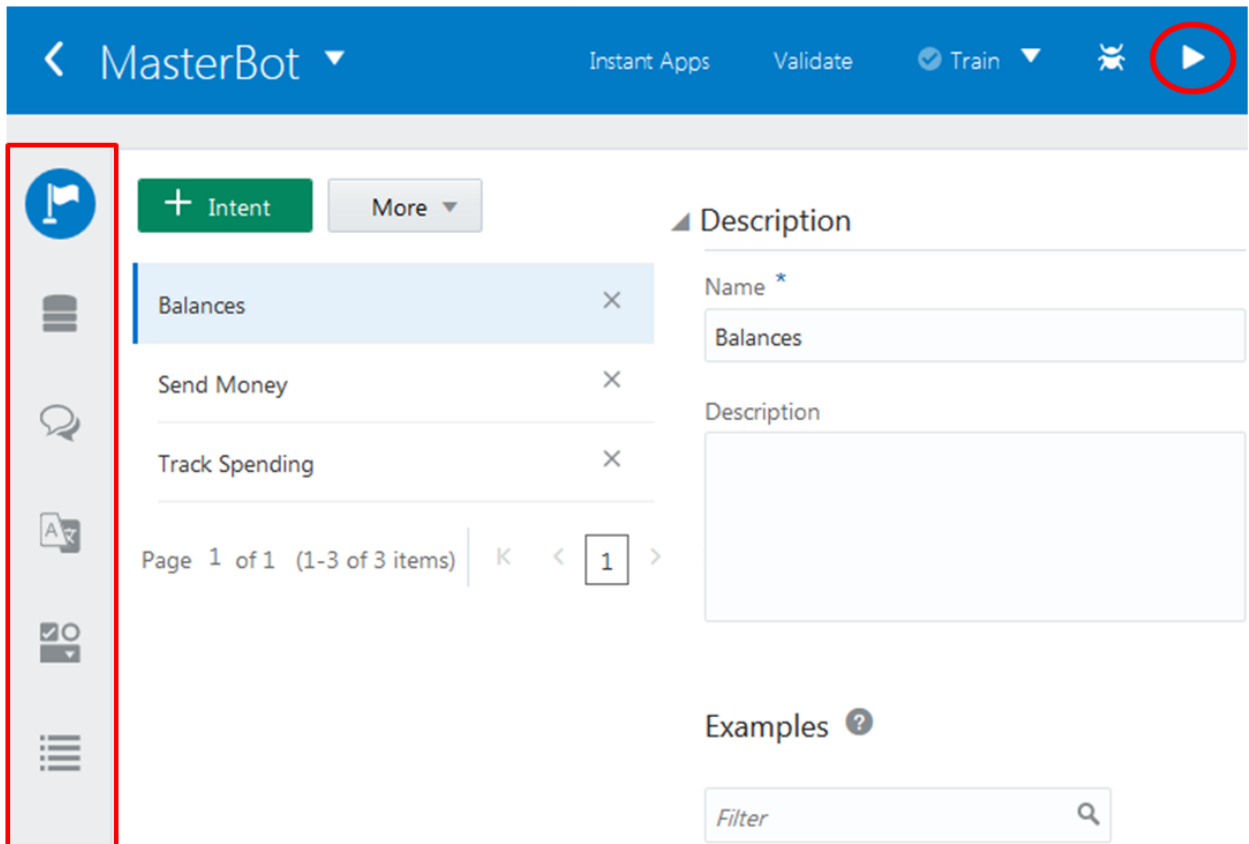
3. Click the MasterBot tile to see the chatbot details.



You can now take a look at the various parts of the chatbot and see how it was designed. On the left, you can see the navbar, which displays a vertical list of icons that allow you to work on the chatbot's intents, entities, flows, components, resource bundles and settings. Each icon that you click navigates you to that portion of the chatbot's design.

4. Click the Intent button (the flag) in the left navbar and then select the Balances intent.

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On the top far right, notice the **Play** icon (that white triangle pointing to the right). This is the button you use to test the chatbot. Click the **Play** button.

5. A test pane (the Tester) opens, where you can enter text messages and send them to the chatbot. The chatbot's replies display above the Messages area.

**Note:** If you've just imported the chatbot, then you need to click the **Train** button before you chat with it.

**Tip:** The **Reset** button allows you to exit any chatbot conversation and start over. If you want to dismiss the test pane, just click the **Play** icon.

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Test Reset

Bot Intent Batch

Enter a message to start chatting with your bot!

Message Send

6. In the message area, type in *What's my balance?* and then click the **Send** button.

Test

Reset

BotIntentBatch

What's my balance? Send

7. The chatbot recognizes that the request is about balances, and to enable it to return an amount, it needs to know the type of account. The chatbot then displays the accounts that it knows about and allows you to select the one you want. You could either type the value in to the Message area, or select it using your mouse.
8. Select one of the accounts. The chatbot returns the balance amount for that account.

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Test
Reset

Bot
Intent
Batch

What's my balance?

For which account do you want your balance?

checking
savings
credit card

checking

The balance in your checking account (903423-123) is \$2334.56

▶ JSON

What's my balance?
Send

- If you would have included the account type in the initial request, then the chatbot would have returned the amount without any prompting for the account. So, try that out by entering *What's my savings balance?* and then click **Send**

**Tip:** Finish each round of questions and answers, or click the **Reset** button to create a new session. Doing this avoids confusion with an incomplete flow from a previous session

Test

Reset

Bot

Intent

Batch

What's my savings balance?

Send

A message is returned showing the balance amount for a specific account type.



The image shows a screenshot of the Botium Playground interface. At the top, there's a header with the word 'Test' and a 'Reset' button. Below the header, there are three tabs: 'Bot', 'Intent', and 'Batch'. The 'Bot' tab is currently selected and highlighted with a blue underline. In the center of the interface, there are two chat bubbles. The first bubble is blue and contains the text 'What's my savings balance?'. The second bubble is grey and contains the text 'The balance in your savings account (258293-832) is \$2610.56'. At the bottom of the interface, there is a 'JSON' link with a right-pointing triangle icon. Below the link is a text input field containing the text 'What's my savings balance?'. To the right of the input field is a 'Send' button.

- 10.** Try some other phrases of your own that are associated with retrieving a bank balance to see how effective they are. Enter phrases like:
- How much do I owe on my credit card?
  - How much money do I have in checking?
  - What's my available credit on my Amex?
  - What's the current balance on my Chase account?

## Step 2: Test the Send Money Function

1. Let's first see how the chatbot responds to a simple version of the request, with the chatbot driving the interaction by issuing prompts.


Test

Reset

Bot

Intent

Batch

Send money to Sasha  [Send](#)

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- The first thing the chatbot needs to know is: which account do you want the money to come from, so select an account.

Test

Reset

Bot

Intent

Batch

Send money to Sasha

From which account do you want to make a payment?

savings
checking
credit card

► JSON

Send money to Sasha

Send

- The last bit of info the chatbot needs is the amount of money to transfer from your account. Be sure to include a dollar sign ("\$\$") before the amount as shown in the screen shot.

Enter a value and click **Send**.

Test

Reset

Bot

Intent

Batch

From which account do you want to make a payment?

savings

checking

credit card

checking

What's the payment amount?

\$50

Your payment of 50.0 dollar to Sasha has been made from checking.

► JSON

\$50

Send

4. Click **Reset**. Now let's try sending all three components in the initial message.  
Enter and then send, *Pay 25 euro to the babysitter from savings.*



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If you provide all the required bits of data all at once, the chatbot can process this and return a confirmation.

Test

Reset

Bot

Intent

Batch

Pay 25 euro to the babysitter from savings

Your payment of 25.0 eur to the babysitter has been made from savings.

► JSON

Pay 25 euro to the babysitter from savings

Send

Try out some alternate phrasing, different accounts, and different amounts, like:

- I'd like to send Sasha \$20 for lunch.
- Pay Mom for rent on the 1st of every month using Visa.
- Pay Lauren \$15 for photos.
- Send \$500 to Mom from Savings every month.

In the next section, you will test out how Track Spending works.

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## Step 3: Test the Track Spending Intent

In this section, you'll see how the chatbot can return the amount of money that you spent from a specific category during a certain time frame.

Testing this intent requires a bit more precision. The way this function is set up, you need to know a couple of things: the spending category and a period of time to use as a measurement.

1. Inside the Tester, enter *How much did I spend on gas?* and then click **Send**.

The return response specifies the amount and the category.

Test

Reset

Bot

Intent

Batch

How much did I spend on gas?

You've spent \$53.25 on gas

► JSON

How much did I spend on gas?

Send

- Click the **Reset** button. Next, enter *How much did I spend at restaurants?* and then click **Send**.

3. Click **Reset**, enter another *How much did I spend on travel?* and then click **Send**.

## Oracle Massive Open Online Course

► JSON



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Similar to your earlier testing, try some other statements that specify a time frame and a category. Here are some that may help:

- How much did I spend eating out last week?
- How much did I spend on clothes last month?
- How much did I spend on gas in October?
- How much did I spend on gas using my Visa cc last month?

In some cases, you will receive a message that you've spent \$0 for a spending category. This is because *last month* might not actually contain any data. Try *last year* instead, as this should cover at least one period when spending took place.

Congratulations! You've completed the first chatbot lab. In subsequent labs, you'll learn how to design, build, and test the MasterBot that you just explored.