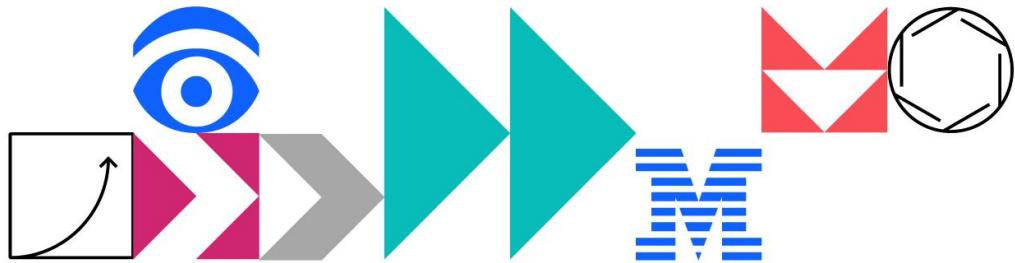


**IBM**



# **Mastering the Art of Digital Labor**

Lab Exercise Guide

Author:

Valentin Volchkov  
[valentin.volchkov@ibm.com](mailto:valentin.volchkov@ibm.com)

## **Notices and disclaimers**

© 2024 International Business Machines Corporation. No part of this document may be reproduced or transmitted in any form without written permission from IBM.

### ***U.S. Government Users Restricted Rights – use, duplication or disclosure restricted by GSA ADP Schedule Contract with IBM.***

This document is current as of the initial date of publication and may be changed by IBM at any time. Not all offerings are available in every country in which IBM operates.

Information in these presentations (including information relating to products that have not yet been announced by IBM) has been reviewed for accuracy as of the date of initial publication and could include unintentional technical or typographical errors. IBM shall have no responsibility to update this information.

***This document is distributed “as is” without any warranty, either express or implied. In no event, shall IBM be liable for any damage arising from the use of this information, including but not limited to, loss of data, business interruption, loss of profit or loss of opportunity.*** IBM products and services are warranted per the terms and conditions of the agreements under which they are provided. The performance data and client examples cited are presented for illustrative purposes only. Actual performance results may vary depending on specific configurations and operating conditions.

IBM products are manufactured from new parts or new and used parts.

In some cases, a product may not be new and may have been previously installed. Regardless, our warranty terms apply.”

### ***Any statements regarding IBM's future direction, intent or product plans are subject to change or withdrawal without notice.***

Performance data contained herein was generally obtained in a controlled, isolated environments. Customer examples are presented as illustrations of how those customers have used IBM products and the results they may have achieved. Actual performance, cost, savings or other results in other operating environments may vary.

References in this document to IBM products, programs, or services does not imply that IBM intends to make such products, programs or services available in all countries in which IBM operates or does business.

Workshops, sessions and associated materials may have been prepared by independent session speakers, and do not necessarily reflect the views of IBM. All materials and discussions are provided for informational purposes only, and are neither intended to, nor shall constitute legal or other guidance or advice to any individual participant or their specific situation.

It is the customer's responsibility to ensure its own compliance with legal requirements and to obtain advice of competent legal counsel as to the identification and interpretation of any relevant laws and regulatory requirements that may affect the customer's business and any actions the customer may need to take to comply with such laws. IBM does not provide legal advice or represent or warrant that its services or products will ensure that the customer follows any law.

### ***Notices and disclaimers (Continued)***

Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products. IBM does not warrant the quality of any third-party products, or the ability of any such third-party products to interoperate with IBM's products. ***IBM expressly disclaims all warranties, expressed or implied, including but not limited to, the implied warranties of merchantability and fitness for a purpose.***

The provision of the information contained herein is not intended to, and does not, grant any right or license under any IBM patents, copyrights, trademarks or other intellectual property right.

IBM, the IBM logo, and ibm.com are trademarks of International Business Machines Corporation, registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the Web at "Copyright and trademark information" at: [www.ibm.com/legal/copytrade.shtml](http://www.ibm.com/legal/copytrade.shtml).

# Table of Contents

<b>1 INTRODUCTION.....</b>	<b>5</b>
1.1 LAB OVERVIEW .....	5
1.2 LAB SCENARIO .....	5
1.3 WHAT YOU WILL LEARN .....	6
<b>2 LOG IN TO WATSONX ORCHESTRATE .....</b>	<b>7</b>
<b>3 RUN THROUGH THE PRECONFIGURED SCENARIO.....</b>	<b>11</b>
3.1 USE THE AI ASSISTANT CHAT PREVIEW EXPERIENCE TO LAUNCH THE SKILL FLOW .....	11
<b>4 CREATE A SKILL FLOW.....</b>	<b>18</b>
4.1 ADD CUSTOM SKILLS TO YOUR PERSONAL SKILLSET.....	18
4.2 CREATING A SKILL FLOW .....	27
4.3 CONFIGURING THE SKILL-FLOW .....	33
<b>5 AI ASSISTANT .....</b>	<b>46</b>
5.1 CREATING AN AI ASSISTANT .....	46
5.2 ADD SKILL CREDENTIALS TO THE DRAFT VERSION OF YOUR AI ASSISTANT.....	48
5.3 ADD SKILL CREDENTIALS TO THE LIVE VERSION OF YOUR AI ASSISTANT.....	54
5.4 CREATING A SKILL-BASED ACTION.....	60
5.5 PUBLISHING AI ASSISTANT .....	64
<b>6 USING YOUR AI ASSISTANT.....</b>	<b>66</b>
6.1 ADD YOUR AI ASSISTANT TO THE AGENTIC CHAT INTERFACE .....	66
6.2 ACCESSING YOUR AI ASSISTANT AND RUNNING A SKILL FLOW .....	67

# 1 Introduction

IBM Watsonx Orchestrate is the IBM solution featuring generative AI and automation technology designed to free you up to pursue more on your “want-to-do” list. Watsonx Orchestrate integrates a set of Business Automation capabilities to deliver even more rapid, precise, and compliant automated skills.

An automation is a collection of artifacts that fulfill a business purpose. You create automations in the Automation Builder and publish them to the Skills and apps page, where you train the skills and make them available in the skill catalog. A user can then use the skill by entering a phrase in the Orchestrate chat bar. Automations can be created in the automation builder and can also be reused in other automations.

An automation contains one or more automation components. An automation component fulfills a business purpose and contains business logic. Thus, an automation can be a **Decision**, a **Workflow** or a **Generative AI activity**.

## 1.1 Lab Overview

This lab shows how IBM Watsonx Orchestrate can be used by sales representatives to assist with the upsell/cross-sell process. To illustrate this, an insurance seller uses Orchestrate to retrieve a list of customers from Salesforce and automatically send a customized offer. The scenario is based on a skill flow that uses the following custom skills:

- CRM search (Salesforce)
- Product upsell decision automation
- Generative AI for email content
- Gmail

You will first run through the user scenario using AI assistant preview screen (pre-published and managed by your tenant admin) and then explore how to build and configure such a scenario as an Orchestrate builder.

## 1.2 Lab Scenario

In this hypothetical insurance brokerage, sales agents spend their time across many tasks while constantly context switching between multiple applications to do their jobs. A large part of any successful insurance seller’s time should be spent servicing existing clients, but an important part of being a great sales agent is finding new business and building pipeline.

Prior to IBM Watsonx Orchestrate, agents in this insurance office dedicated a few hours per week to sending

prospecting emails for upsell and cross-sell opportunities, as well as building pipeline.

This demo shows how the prospecting work in this scenario can be done more effectively with IBM Watsonx Orchestrate by creating a sequence of skills that perform the multiple steps of the upsell process using a skill flow. A skill flow is a sequence of skills where the inputs and outputs of individual skills are wired together to reduce data entry.

## 1.3 What you will learn

At the end of the lab, you will be able to:

- Create a skill flow
- Create a custom-built skill
- Understand how decision service automations can be incorporated into your processes
- Leverage generative AI to create custom content
- Use out of the box pre-built skills.

## 2 Log in to watsonx Orchestrate

First, you must log in to watsonx Orchestrate.

1. Enter the URL <https://dl.watson-orchestrate.ibm.com/> into the browser within your lab environment.
2. Enter the username and password **your instructor provided** to login.



3. When you first login, you will likely get a warning to provide a code for two-factor authentication as shown below. If the screen is **not** presented, proceed to **Section 3** below.

### Enter code sent to your email

For added security, we sent a 6-digit code to [use\\*\\*\\*@mailinator.com](mailto:use***@mailinator.com).  
Please enter the code below within 20 minutes

Enter email code

5727-

**Verify**

4. Open another tab in your web browser and navigate to <https://www.mailinator.com>. **Scroll down** until you see the **Free Disposable Email** section.

The screenshot shows the Mailinator homepage. At the top, there's a search bar with "Enter Public Mailinator inbox" and a "GO" button. To the right are links for "Public Inbox", "Mailinator", "Mailinator-Millions of Inboxes. All yours.", and navigation options like "WHY MAILINATOR", "PRICING", "SUPPORT", "MAILINATOR BLOG", "ABOUT", "GET FREE TRIAL", and "LOGIN". Below the header, there's a section titled "Email and SMS Workflow Testing" with a brief description and a "GET FREE TRIAL" button. To the right, a laptop screen displays a "Private Team Inbox" with several test emails from "Customer Support" and "marketing\_mycompany.co" with subjects like "Account Login Detected", "It's been awhile! Come check out our new doob!", and "New User Signup Test".

## 5. Perform the following steps:

- Enter your **User ID (A)**
- Click **TRY IT FREE (B)**

The screenshot shows the "Mailinator's Free Disposable Email" sign-up page. It features a field labeled "TectCDUserXX" with a red box around it (labeled A) and a "TRY IT FREE" button with a red box around it (labeled B). Below the form, there's a section titled "Mailinator Subscription Plans" with four options: "Verified Pro", "Business", "Business Plus" (which has a green bookmark icon), and "Enterprise".

## 6. Click the **IBM Security Verify your identity** email.

**Public Messages**

From	Subject	Received
<input type="checkbox"/> IBM Security	Verify your identity	2 min
<input type="checkbox"/> IBM Security	Confirmation de votre identité	16 min

7. Copy the **last 6 digits** of the security code.

**Public Message > Verify your identity**

To: teclduserxx	<input type="checkbox"/> Delete
From: ibmacct@iam.ibm.com	
Sending IP: 168.245.8.67	
Received: 2024-06-12 11:22:10	

**HTML** [JSON](#) [RAW](#) [LINKS](#) [SMTP\\_LOG](#) [ATTACHMENTS](#)

IBM verify code

Please use the following verification code:  
**1564-084377**

You can only use it once and it will expire after 20min.

If you did not request this, please disregard this email and contact our [helpdesk](#).

8. Type it in to the verification form still open in your other browser tab and click **Verify**.

Enter code sent to your email

For added security, we sent a 6-digit code to **use\*\*\*@mailinator.com**.

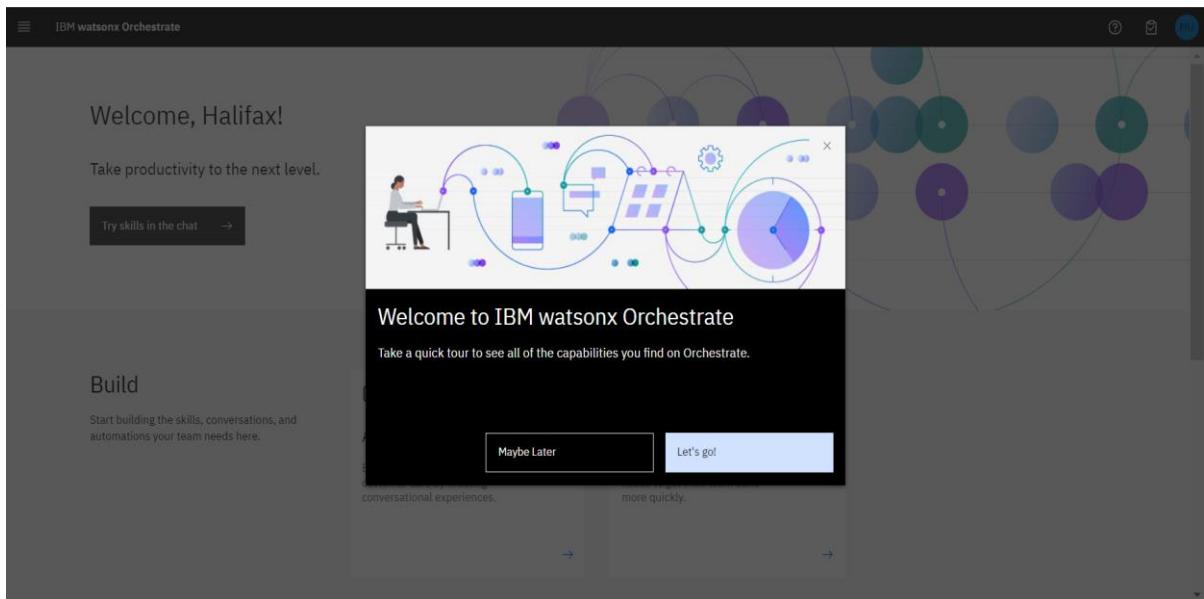
Please enter the code below within 20 minutes

Enter email code

5727-

**Verify**

- Once logged in, the landing page of Orchestrate opens and a **What's new** guide may appear. If you want, you can see a little tour by clicking the **Let's go!** button, or you can close the pop up by clicking the **Maybe later** button.



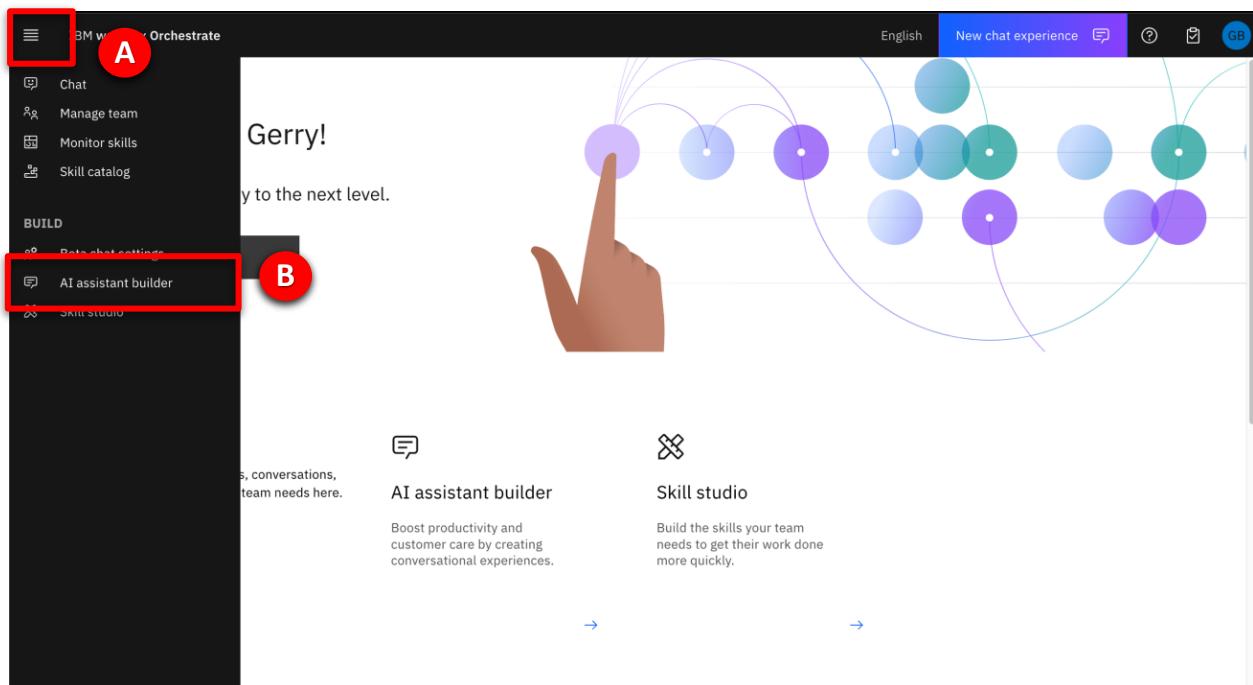
Congratulations, you are now ready to start the lab exercises!

# 3 Run through the preconfigured scenario

Before creating your own AI assistant, you will use an example assistant that has been provided to you. As the lab progresses, you will understand how to create the underlying AI assistant.

## 3.1 Use the AI Assistant chat preview experience to launch the skill flow

1. Click the navigation hamburger menu (**A**) and select the **AI Assistant builder** (**B**).



2. Make sure that the **AskSales Solution AI assistant** is selected in the assistant dropdown.

The screenshot shows the IBM Watsonx Orchestrate interface. At the top, there are three tabs: 'IBM Watsonx Orchestrate', 'AI assistant builder', and 'AskSales Solution AI Assistant'. The third tab is highlighted with a red box. Below the tabs, there's a navigation bar with icons for 'View all assistants' and 'Assistant Builder Home'. The main content area is titled 'AskSales Solution AI Assistant' and shows a message about a 'New release' where conversational search is GA. It also mentions that as of May 3, 2024, conversational search is available, noting 'Pricing' and 'Terms' apply. A note indicates that the assistant now has new generative AI features. On the left, a sidebar lists 'Home', 'Build', 'Generative AI', 'Actions', 'Preview' (which is highlighted with a red box), 'Publish', 'Environments', 'Improve', and 'Analyze'. On the right, there are three cards: 'Enhance your assistant' (with a note about improving and customizing), 'Build actions' (with a note about enhancing and improving actions), and 'Customize your greeting' (with a note about welcoming users in a unique way). Each card has a right-pointing arrow.

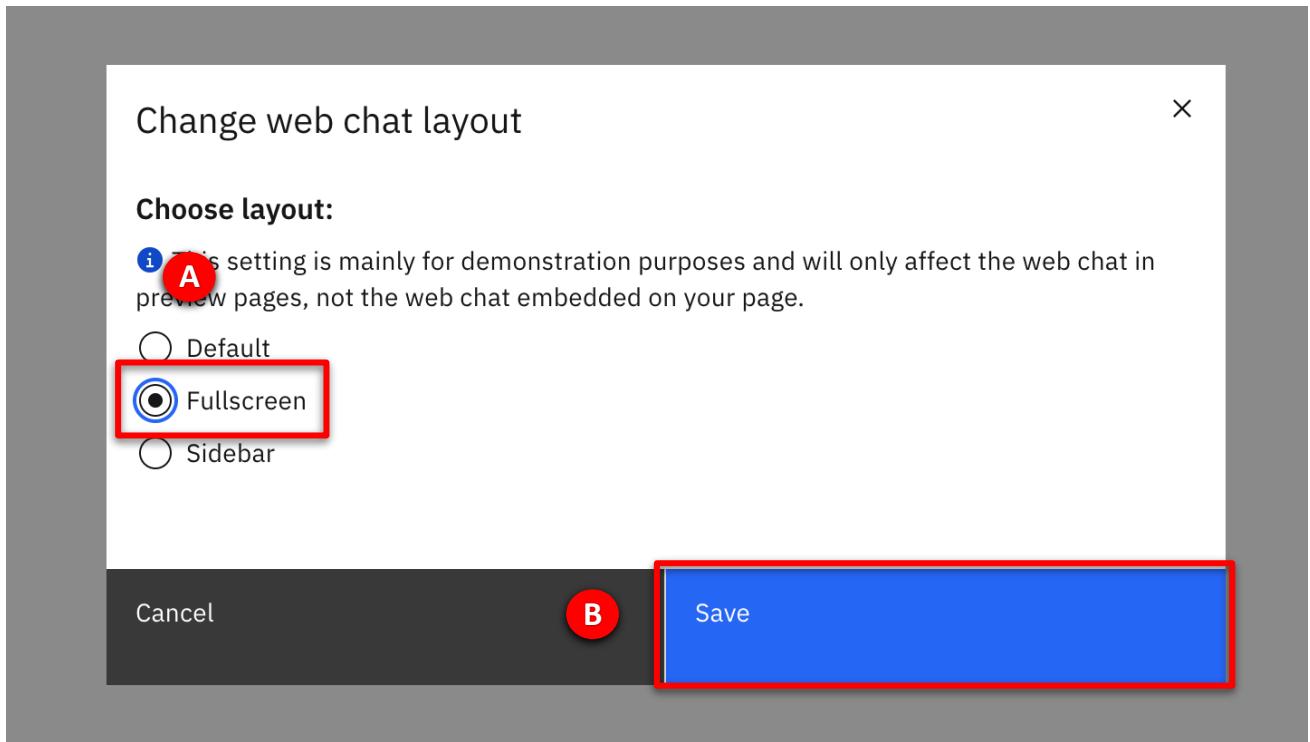
3. Click the **Preview** menu on the left-hand side.

This screenshot is similar to the one above but focuses on the 'Preview' section. The 'Preview' menu item in the sidebar is highlighted with a red box. The main content area shows the 'AskSales Solution AI Assistant' page with the same information about the new release and generative AI features. The sidebar options remain the same: Home, Build, Generative AI, Actions, Preview, Publish, Environments, Improve, and Analyze. The right-side cards are identical to the first screenshot: 'Enhance your assistant', 'Build actions', and 'Customize your greeting'.

4. Click the **Change layout** button along the top.

The screenshot shows the IBM Watsonx Orchestrate interface. In the top navigation bar, there are tabs for "IBM Watsonx Orchestrate", "AI assistant builder", and "AskSales Solution AI Assistant". On the right side of the header, there are buttons for "New chat experience" (with a message icon), "Change layout" (with a gear icon), "Change background" (with a plus sign icon), and "Customize web chat" (with a gear icon). Below the header, the main area is titled "Preview assistant" and contains a sidebar with various icons. The main content area is titled "Assistant" and displays a welcome message: "Hi! I'm a virtual assistant. How can I help you today?". Below this message are three examples: "Example: Find nearby location", "Example: Check account balance", and "Example: See how I can help".

5. Click the **Fullscreen (A)** option and click the **Save (B)** button.



6. In the chat bar, enter the following text: "**write an upsell email to my customers.**"

Hi! I'm a virtual assistant. How can I help you today?

Example: Find nearby location

Example: Check account balance

Example: See how I can help

write an upsell email to my customers



IBM Watsonx Orchestrate runs a series of skills, retrieving a list of customers with recent life events. The retrieved customer data is neatly displayed in a table within the chat interface. The agent reviews the list of customers and pursues a cross-sell opportunity with **John Collins**, who has a child that is about to turn twenty-six. In the US, twenty-six is a milestone requiring children to acquire independent health insurance coverage (other countries set different age limits for various family milestones).

7. Select **John Collins** from the table and click **Apply** in the chat window.

List of Customers with Recent Life Changes

Customer Name	Email	Recent Change
Janet Thomas	janethomas@gmail.com	Recently turned 64
John Collins	johncollins@xyzcompany.com	Child recently turned 25
Oliver Paul	oliverpaul@gmail.com	Purchased new vehicle
Mary Green	marygreen@abcinsurance.com	Recently moved to new home
Sam Anthony	samanthony@xyzcompany.com	Dental coverage upgraded

Items per page: 5 ▾ 1 – 5 of 5 items 1 ▾ of 1 ◀ ▶

**Cancel** **Apply**

Next, the agent needs to determine which products to recommend for John based on his circumstances and recent life event. The customer details from the CRM system are automatically submitted into Watsonx Orchestrate's built-in decision engine and the upsell recommendations are displayed. Behind the scenes, the decision engine applies business logic that considers many different attributes specific to this customer (John Collins), such as age, life event, and current coverage to determine the best product that the insurance agent should suggest to this customer.

8. Click **Apply**.

 Upsell Smith

Input instruction \*

You are an insurance salesman and you have a client named John Collins. Write a marketing email to the client. Do not include the subject in the response. The customer has a child that recently turned 25. In the USA, every young adult is required to purchase independent health by the age of 26. Recommend the silver plan as it is very cost effective. We will give a 15% discount as a loyalty bonus if the child takes out a policy with us.

**Cancel** **Apply**

Clicking **Apply**, submits the prompt into the Generate an email skill, and this will take several seconds to complete. For this skill, watsonx Orchestrate is working asynchronously, it's not blocking and waiting for a response that may otherwise time-out. Instead, it is notified by the long running activity when the work is finished and then resumes the skill flow. During this waiting time, the user can do other work and can jump back to this task once the response is received.

9. Review the email text generated by IBM watsonx.ai.

Content

Subject: Health Insurance for Your Child

Dear John Collins,

I hope this email finds you well. As a valued client of ours, we wanted to reach out to you regarding an important matter concerning your child's health insurance coverage.

As you may be aware, in the USA, young adults are required to purchase independent health insurance by the age of 26. This is a great opportunity for your child to have access to quality healthcare and protect themselves from unexpected medical expenses.

At our company, we offer a range of health insurance plans that cater to the needs of young adults. We highly recommend our Silver Plan, which is not only comprehensive but also very cost-effective. With the Silver Plan, your child will have access to a wide network of healthcare providers, hospitals, and pharmacies.

As a loyalty bonus, we are happy to offer a 15% discount on the premium if your child takes out a policy with us. This is a one-time offer, and we encourage you to take advantage of it while you can.

Here are some key benefits of the Silver Plan:

Generative AI did a good job generating the email, don't you think? Note that your text will likely be a bit different than shown in the picture above.

10. Change the email address in the **To** (1) field to your own email address (one that you can access to verify the email sending). Scroll down and click **Apply** (2) in the Assistant's chat window.

Subject  
**Important Update for John Collins and his 25-Year-Old Child**

A phrase that summarizes the email content

Content type  
text/plain

The content type of the email, such as text or HTML.

Content

Subject: Important Update for John Collins and his 25-Year-Old Child

Dear John Collins,

I hope this email finds you well. I am writing to inform you about a significant change in health insurance requirements for young adults in the United States. As you may be aware, every individual who turns 26 is required to have their own independent health insurance policy. This change takes effect on January 1st, 2023.

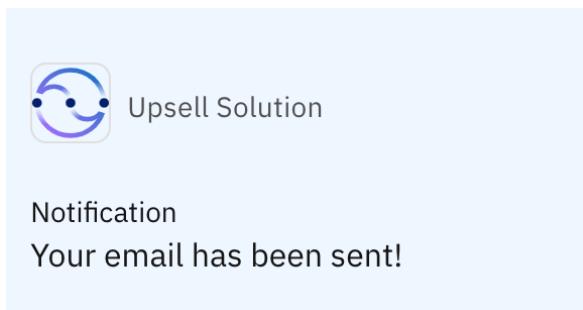
Your 25-year-old child, [Child's Full Name], is currently enrolled in your health insurance policy. However, since they will soon be turning 26, it is crucial that they have their own policy to avoid any disruptions in coverage.

To help you and your child navigate this transition, I would like to recommend the silver plan as a highly cost-effective option. This plan offers comprehensive coverage at a

The body content of the email

Cancel **Apply**

11. You will be notified that the email has been sent.



This concludes section two of this lab. Good job!

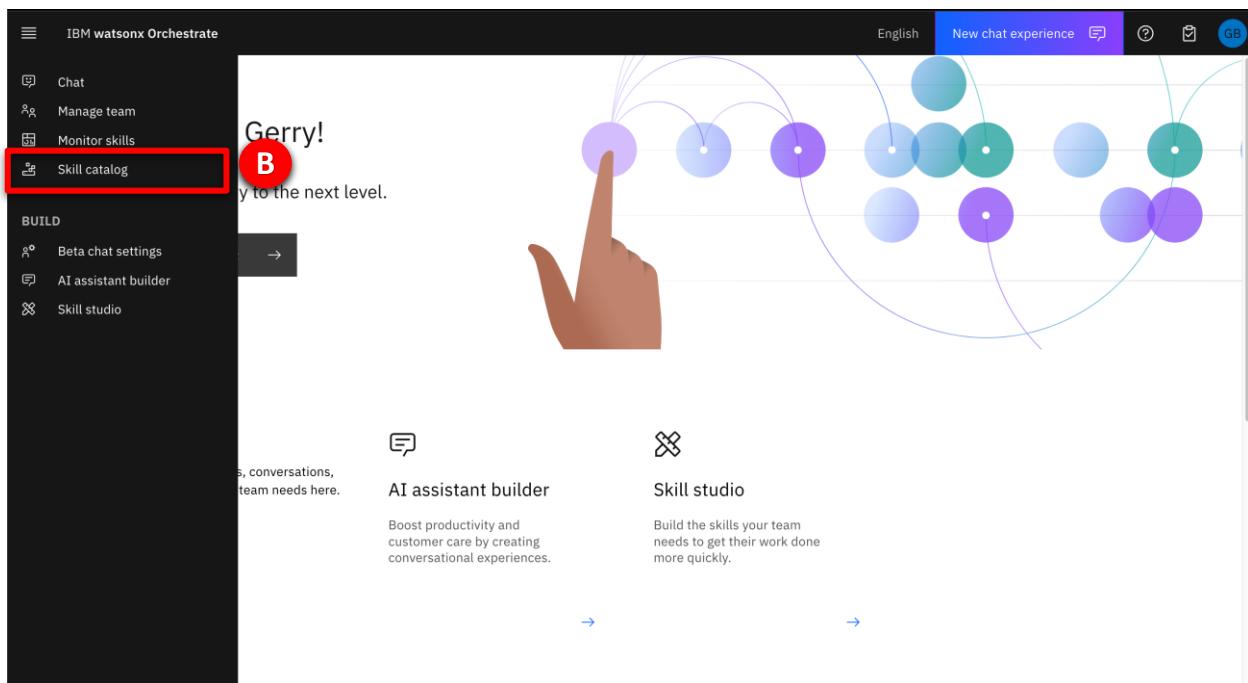
## 4 Create a skill flow

In the previous section you used a pre-existing skill flow through an AI Assistant, in the following sections you will recreate the skill flow.

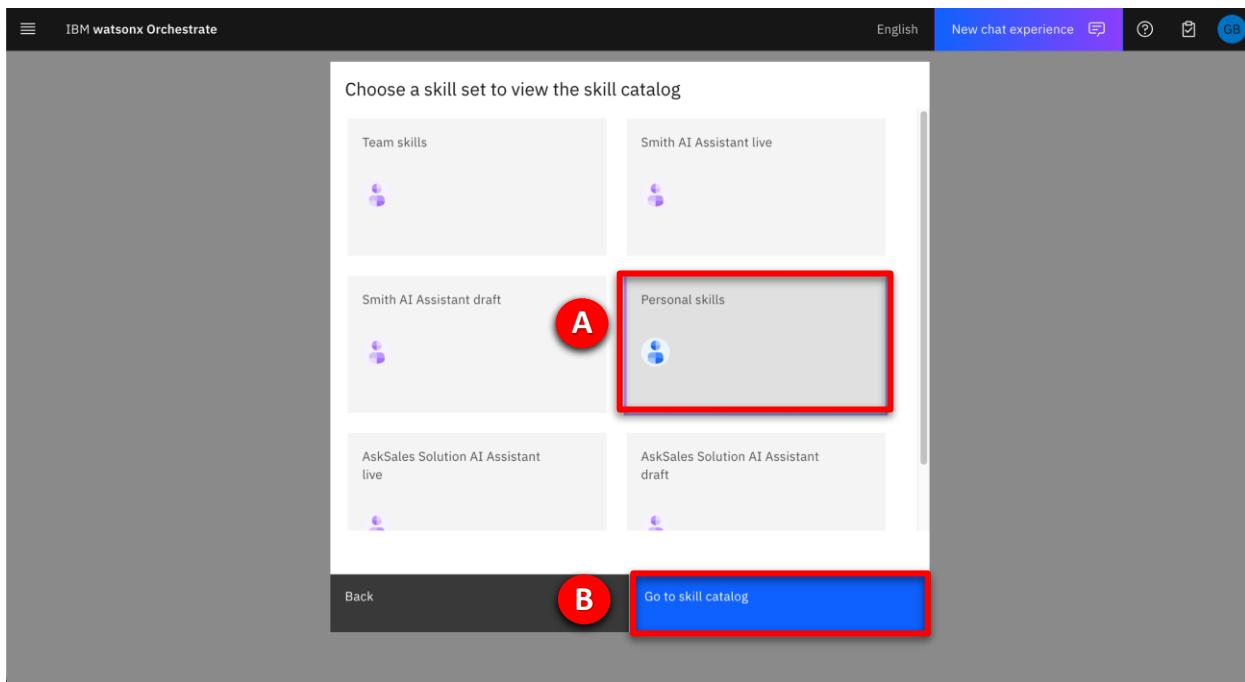
When you create a skill flow, you can map the output of one skill as the input for subsequent skills, ensuring that the actions are seamlessly integrated. First you will add the individual skills to your personal skillset. Once done, you will be able to create a skill flow out of those previously added skills.

### 4.1 Add custom skills to your personal skillset

1. Click the navigation hamburger menu (A) and select **Skill catalog** (B).



2. Select **Personal skills** (A), then click **Go to skill catalog** (B).



3. Search for **life** in the search panel.

The screenshot shows the 'Skill catalog' page with the following elements:

- Header: IBM Watsonx Orchestrate
- Section: Skill catalog
- Text: Skills are grouped by app. Select an app to see all the skills that use that app.
- Filter: Personal skills (selected)
- Search bar: Q life (the search term is highlighted with a red box)
- Section: Apps
- Card: VV - Salesforce - Get customers ... (1 skill) (this card is highlighted with a red box)

4. The list of apps is filtered to only those that contain skills containing the word “life”. Click the **VV – Salesforce – Get customers with recent life changes** tile.

IBM watsonx Orchestrate

## Skill catalog

Skills are grouped by app. Select an app to see all the skills that use that app.

Personal skills

life

### Apps

VV - Salesforce - Get customers ...  
1 skill

5. Click **Add skill +** (1) on the skill tile, then click **Connect app** (2).

IBM watsonx Orchestrate

Skill catalog /

VV - Salesforce - Get customers with recent life changes (1)

2 Connect app

Personal skills

Search skills

VV - Salesforce - Get customers with recent life changes

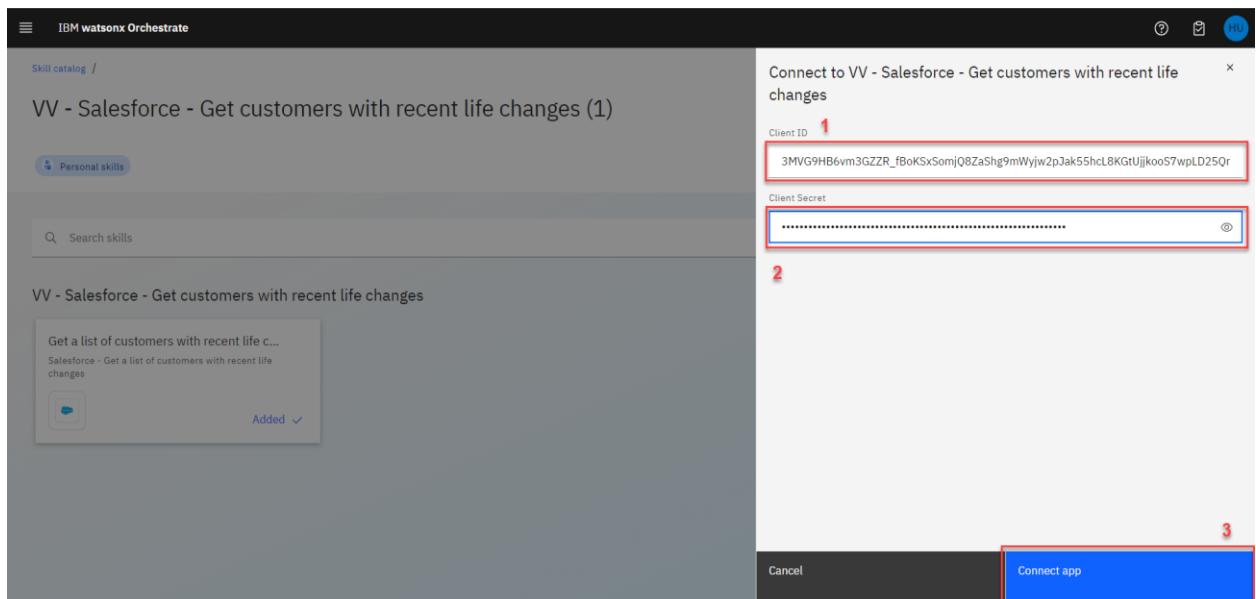
Get a list of customers with recent life c...  
Salesforce - Get a list of customers with recent life changes

Add skill + 1

6. Use the following credentials:

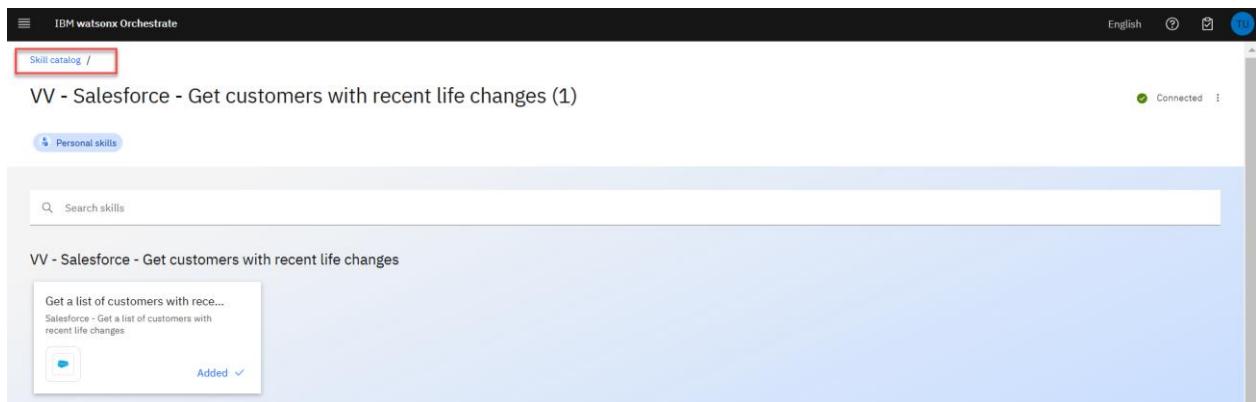
- **Client ID** (1): 3MVG9HB6vm3GZZR\_fBoKSxSomjQ8ZaShg9mWyjw2pJak55hcL8KGtUjjkooS7wpLD25QraIBxop4ThrTPK237
- **Client Secret** (2): 34CB8CCE1E4495C0CAE6A921A5FC7D17CC6CE614152175D20F5B00F8B250626C

Click **Connect app** (3).

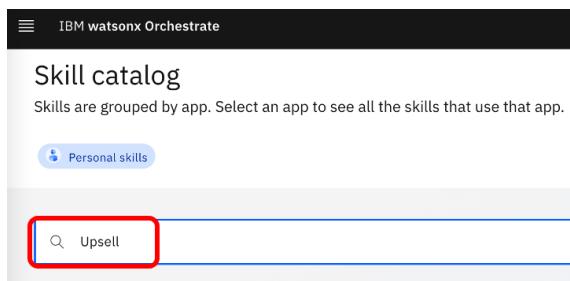


Following the same process as noted above, you will now add the decision service that is used to determine the upsell opportunity.

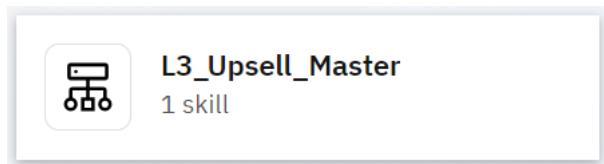
#### 7. Click the **Skill catalog** breadcrumb in the top-left corner.



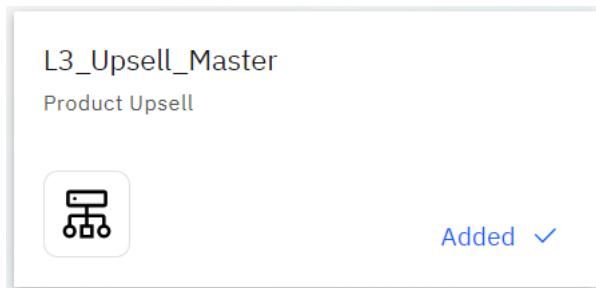
#### 8. Search for **Upsell** in the search panel.



#### 9. Click **L3\_Upsell\_Master**.

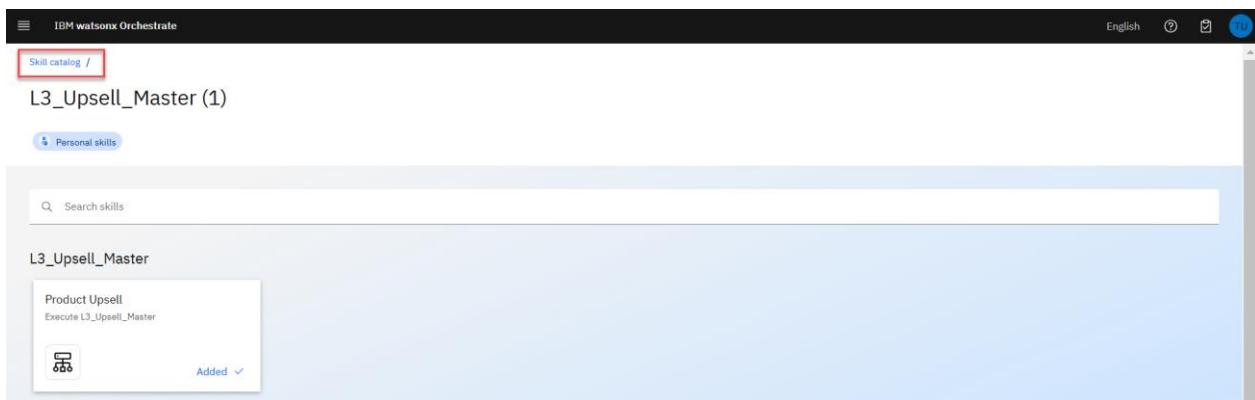


10. Click **Add skill +**. Since the skill is an automation (decision) created on Orchestrate platform, we do not need to connect to it like we do with most other pre-built or custom skills.

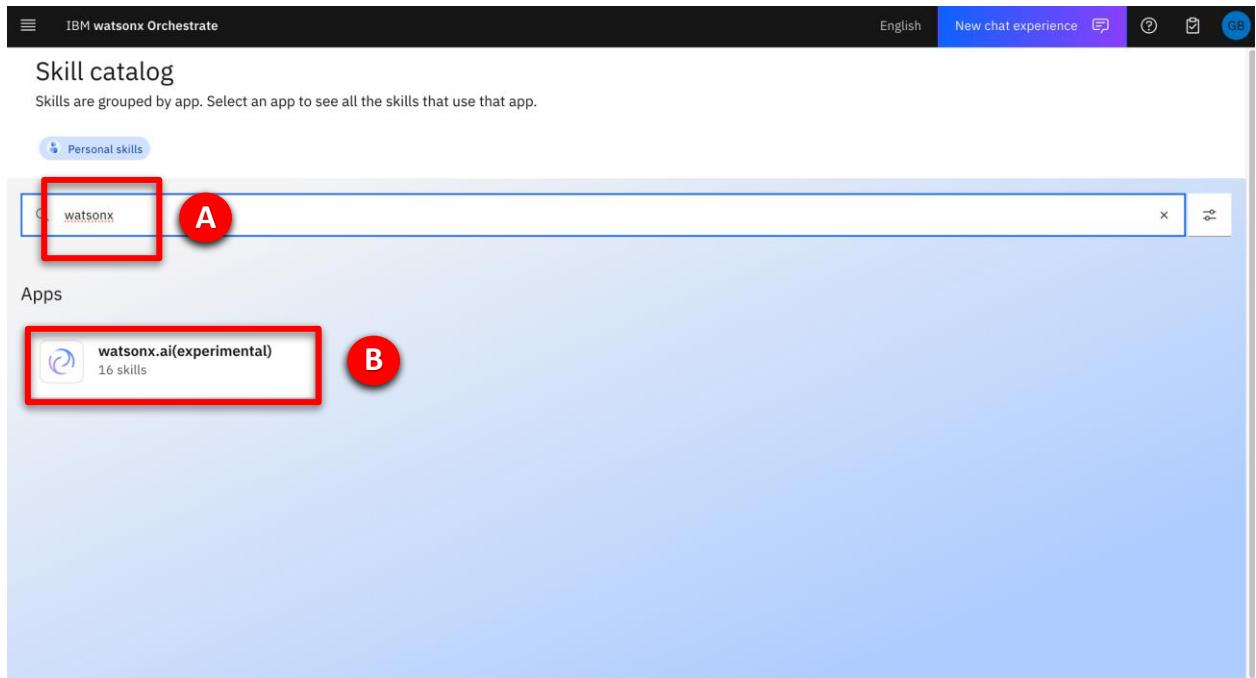


Next, you will add the generative AI skill that you will use to automatically create the email communication sent to the customer.

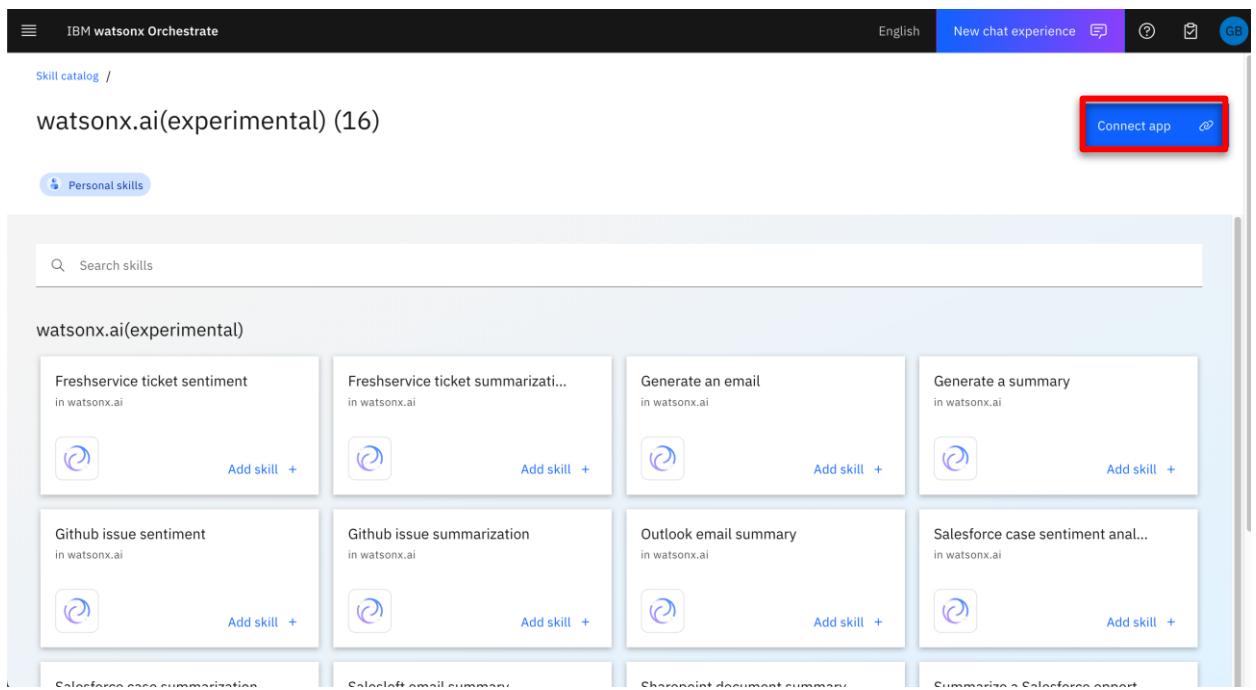
11. Click the **Skill catalog** breadcrumb in the top-left corner.



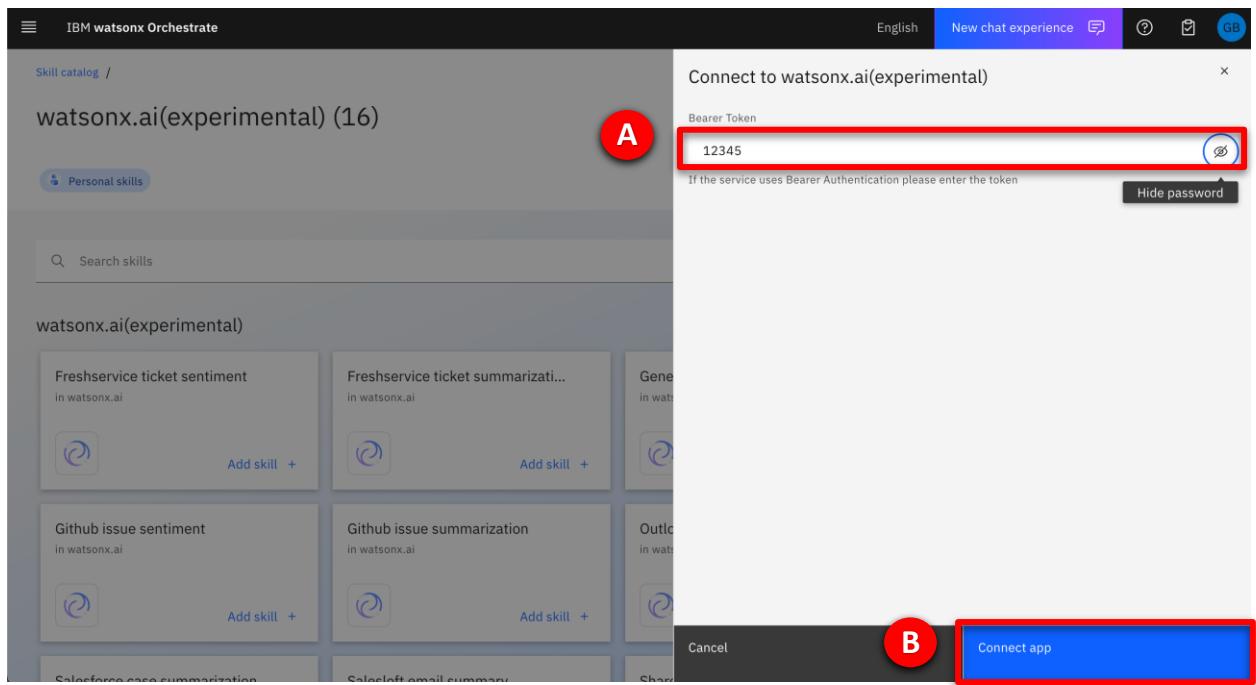
12. In the search bar, type “watsonx” **(A)** and hit enter, then click on the **watsonx.ai(experimental)** application **(B)**.



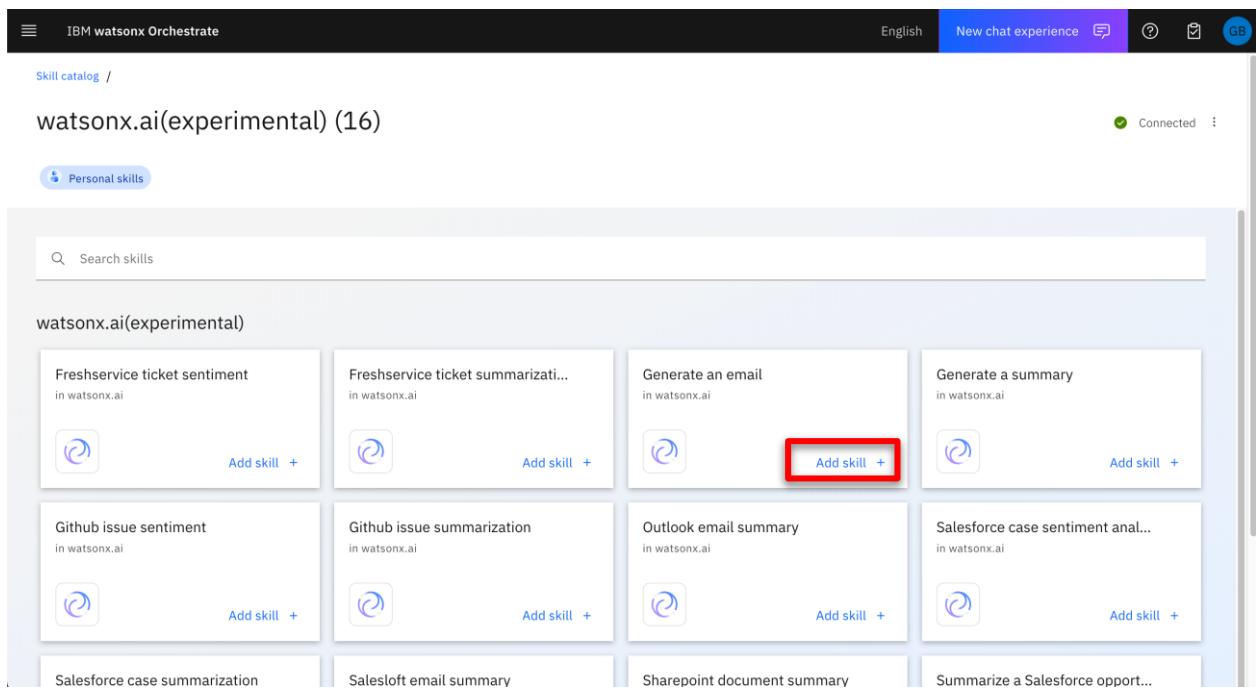
13. Click **Connect app** in the upper right-hand corner.



14. Enter “12345” into the **Bearer Token** field (A), then click **Connect app** (B).

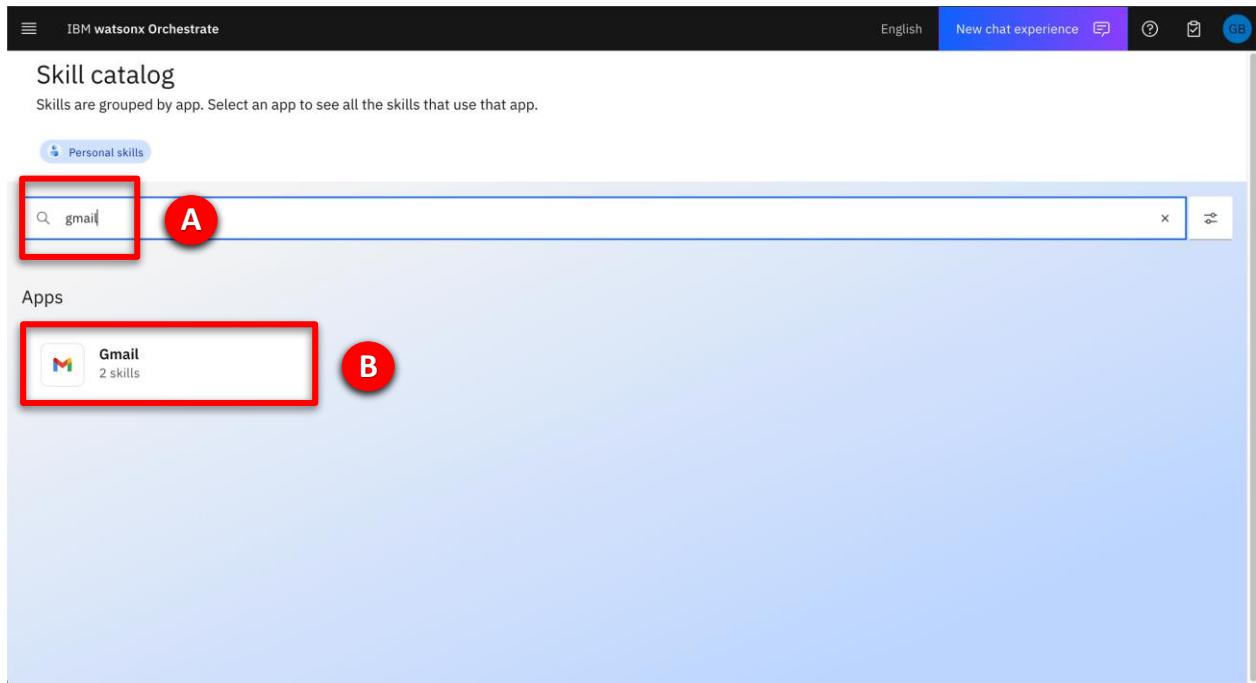


15. On the **Generate an email** skill, click the **Add skill +** button.

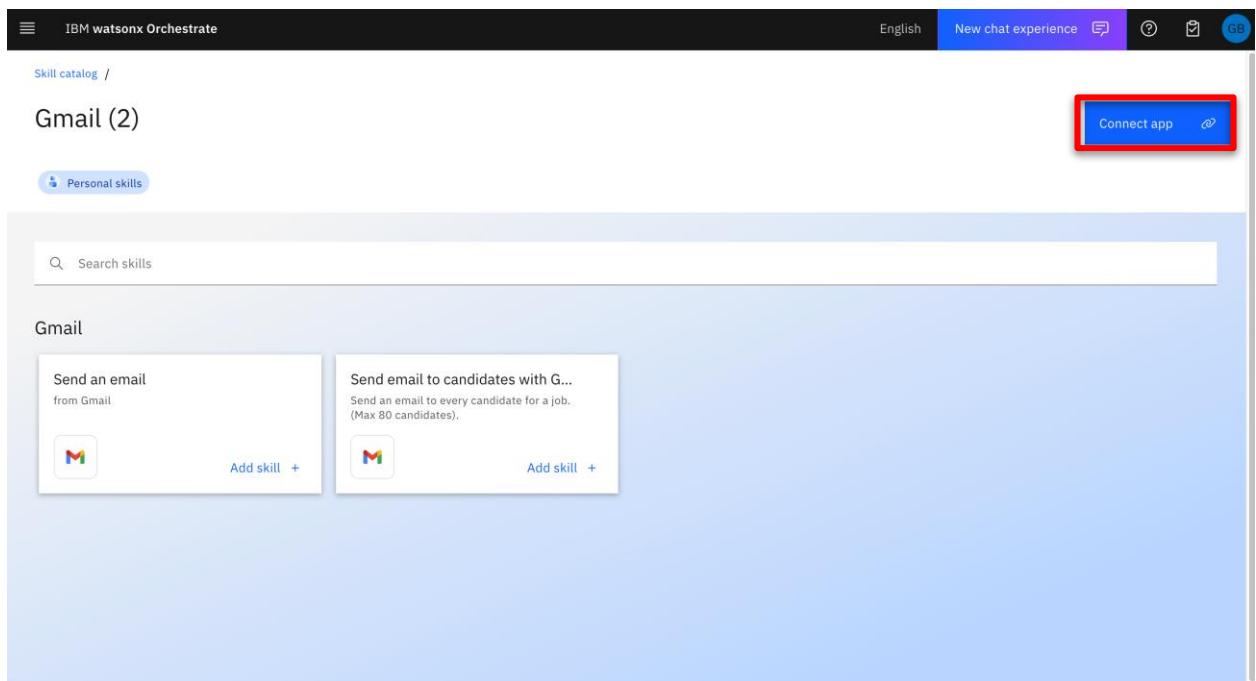


Lastly, you will add the communication skill that you will be using to communicate with the customer. In this case, you will be using the Gmail – Send an email skill.

16. Click the **Skill catalog** breadcrumb in the top-left corner. In the search bar, type “gmail” **(A)** and hit enter, then click on the **Gmail** application **(B)**.



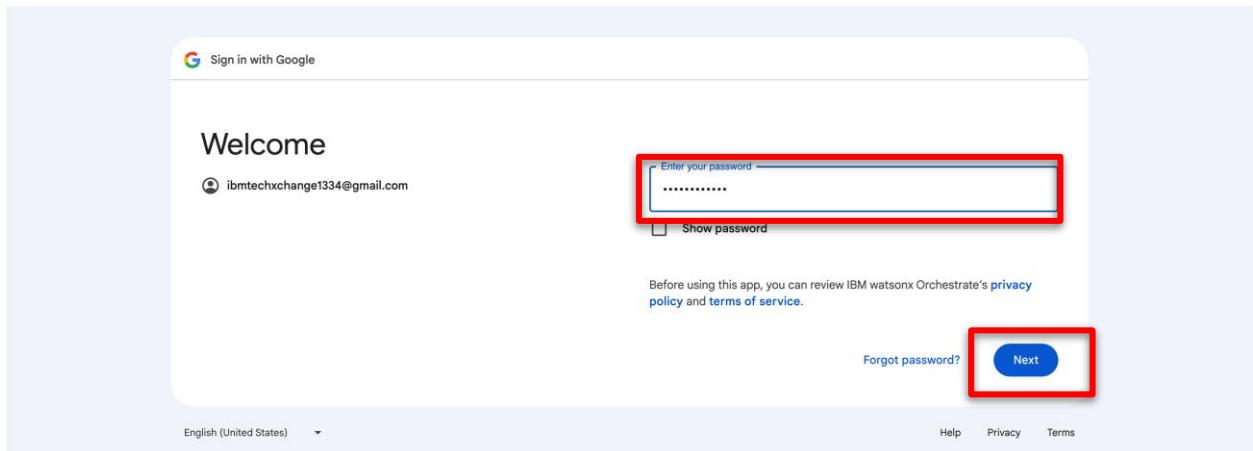
17. Click **Connect app**.



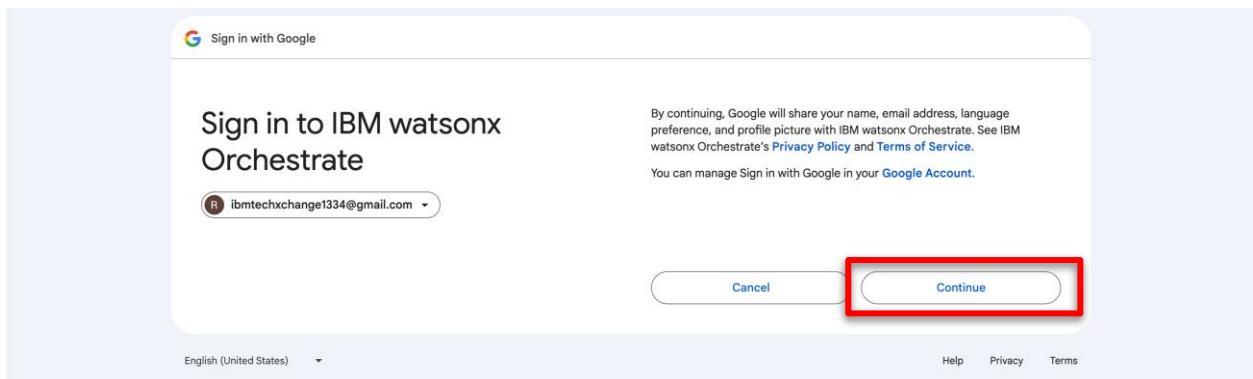
18. You may be presented with a user consent modal. If so, click **Agree** on the user consent modal.

19. Enter the following username “IBMTechXChangeCanada@gmail.com”, then click **Next**.

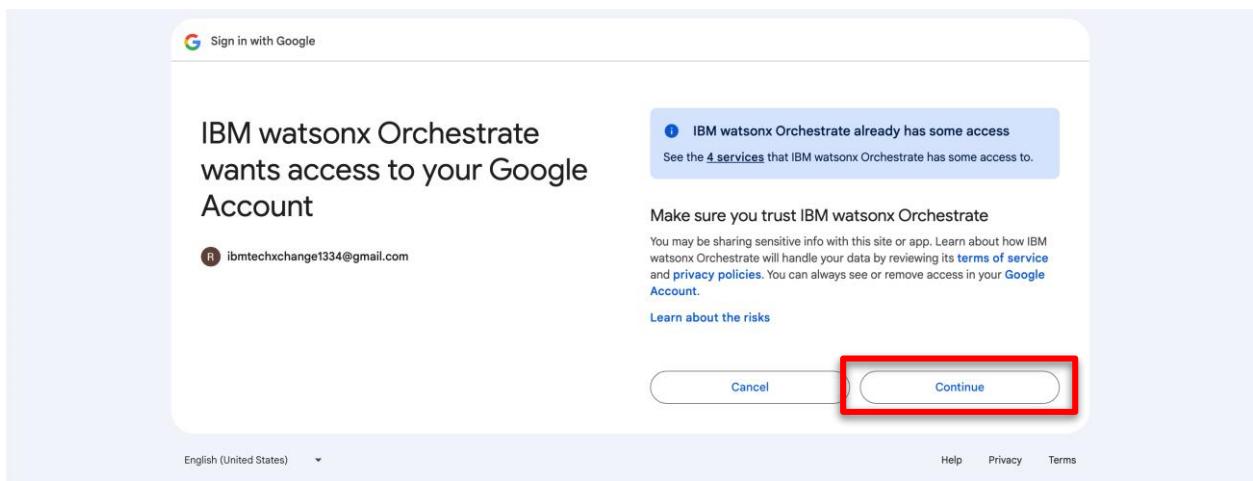
20. Enter the following password, then click **Next**: Bq9t&21k!7Al



21. Click **Continue**.



22. Click **Continue**.



23. On the **Send an email** skill, click the **Add skill +** button.

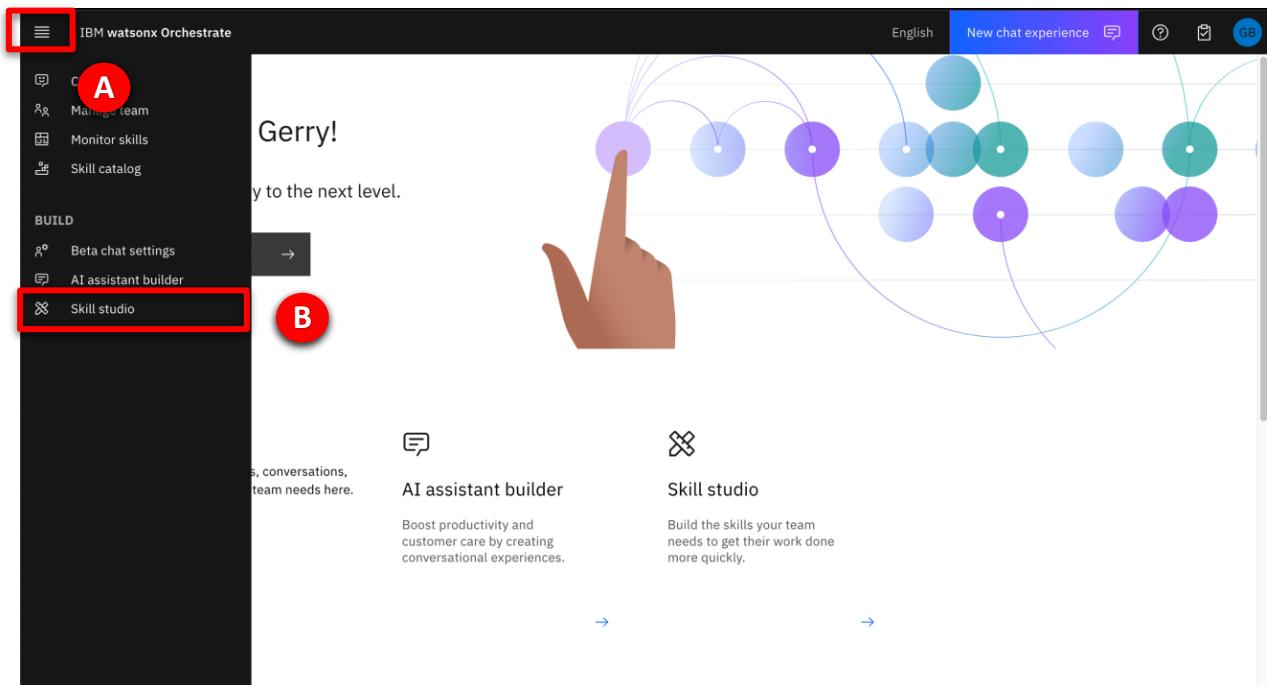
The screenshot shows the IBM Watsonx Orchestrate interface. At the top, there's a dark header bar with the text "IBM Watsonx Orchestrate". To the right of the header are buttons for "English", "New chat experience", and some icons. Below the header, the page title is "Skill catalog / Gmail (2)". On the left, there's a sidebar with a "Personal skills" section and a search bar labeled "Search skills". The main content area is titled "Gmail" and contains two skill cards. The first skill card is titled "Send an email from Gmail" and has an "Add skill +" button highlighted with a red box. The second skill card is titled "Send email to candidates with G..." and also has an "Add skill +" button. Both cards feature the Gmail logo.

You have now successfully added all the skills that will be used in the usage scenario. Next, you will chain these skills together to create a skill flow.

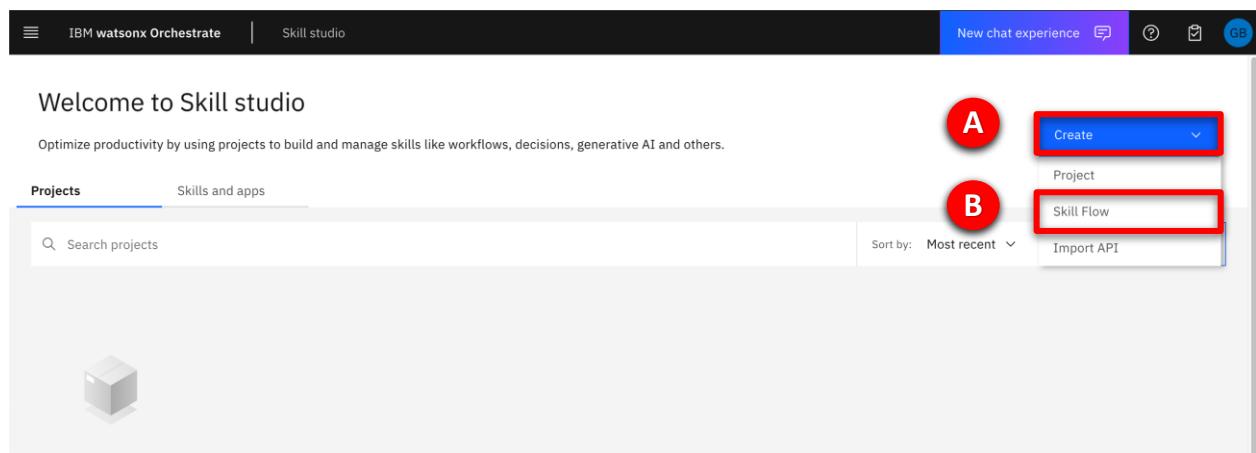
## 4.2 Creating a skill flow

Now that you have added the individual skills to your personal skillset, we can begin creating the skill-flow.

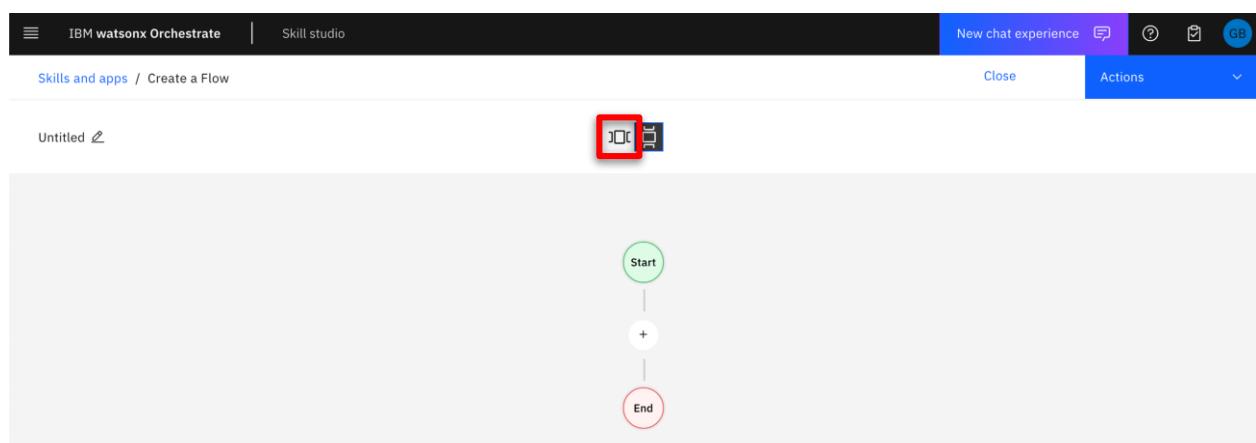
1. Click the navigation hamburger menu **(A)** and select **Skill studio (B)**.



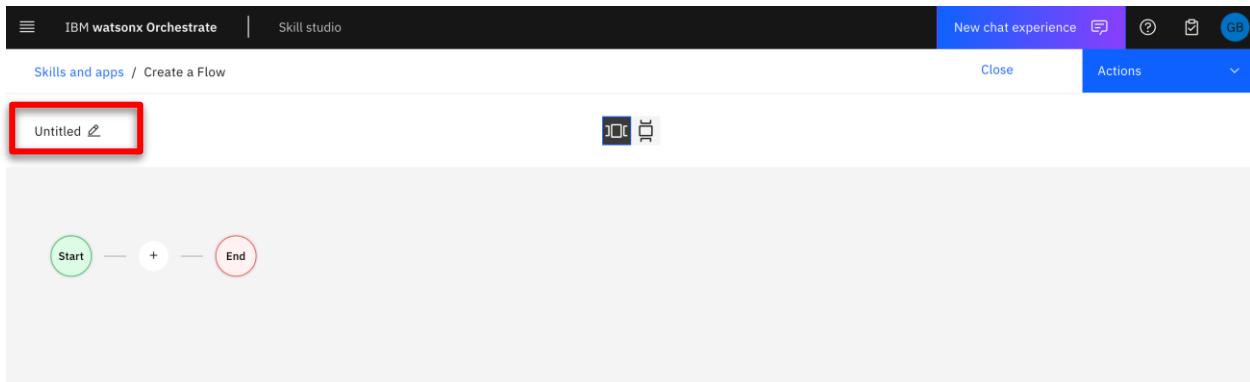
2. In the top right corner select the **Create** dropdown (A) and select **Skill Flow** (B).



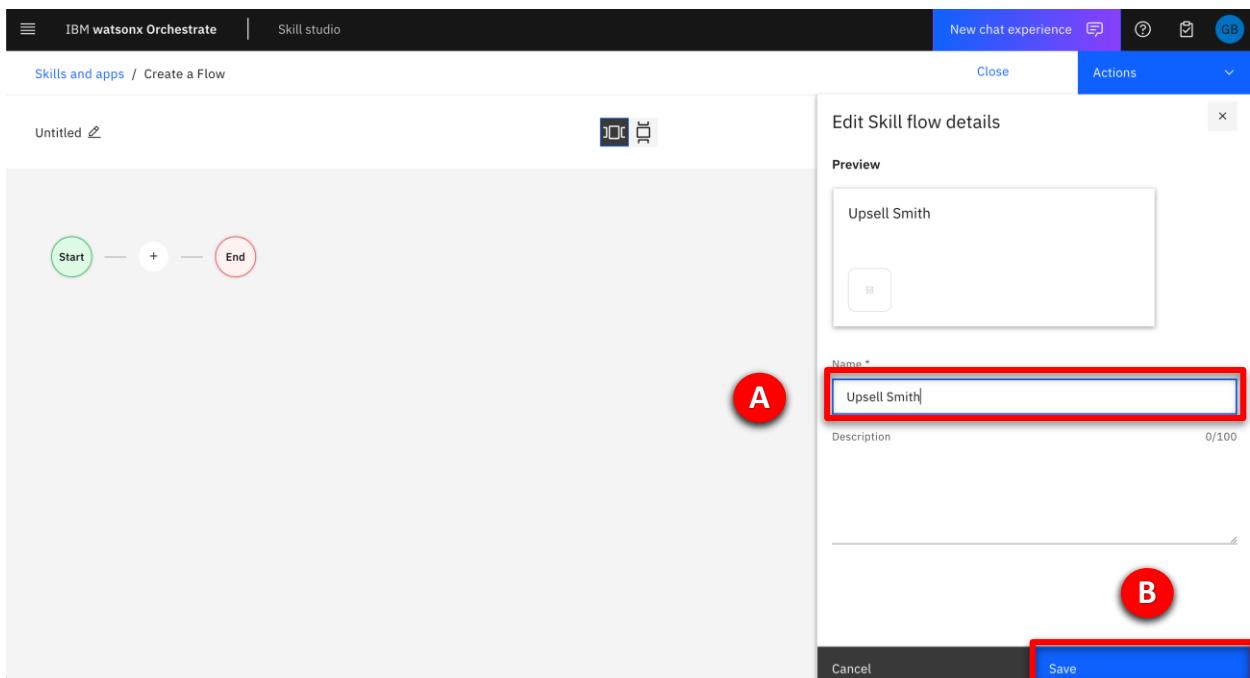
3. Click the horizontal layout button.



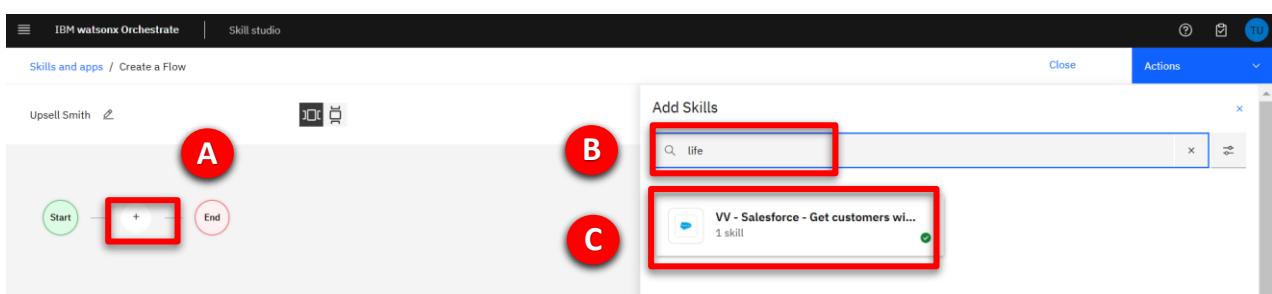
- Click the pencil icon in the top-left corner.



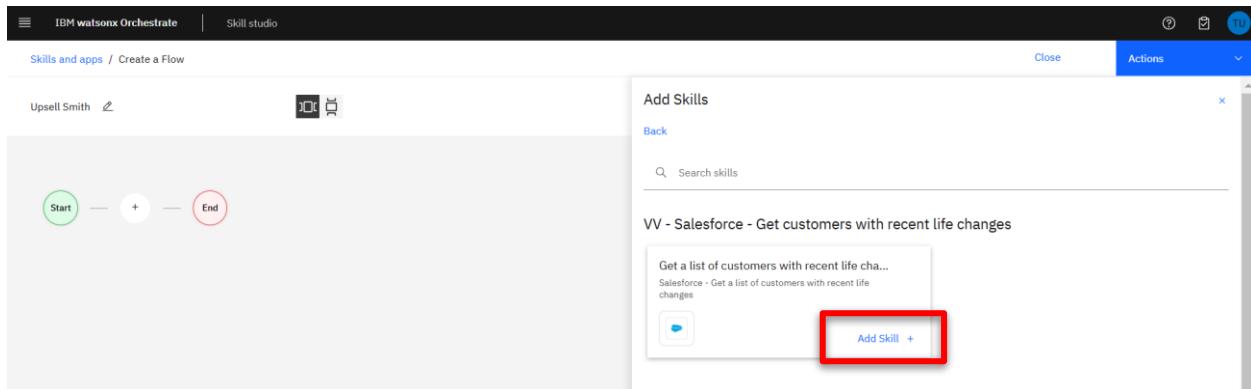
- In the **Name (A)** field, enter “Upsell [YOUR LASTNAME]” and click **Save (B)**. This is done to differentiate the individual user’s skill flows. For example, someone named Rebecca Smith would enter “Upsell Smith”.



- Click the + icon (A), then enter “life” in the search field (B), then select the Salesforce application (C).

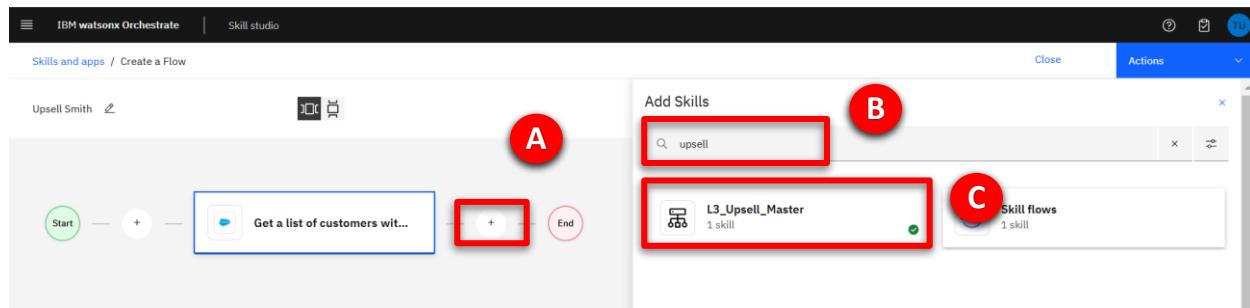


- Select **Add Skill** within the skill tile.

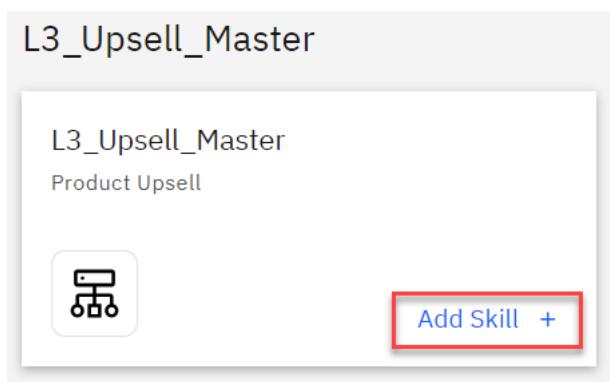


You have now added the first skill that will be used in the skill flow. This skill retrieves a list of customers that you will be targeting for our sales outreach. Next you will add the decision skill that will be used to determine what product you will be suggesting to the customer.

- Click the + icon (A), then enter “upsell” in the search field (B), then select the **L3\_Upsell\_Master** application (C).

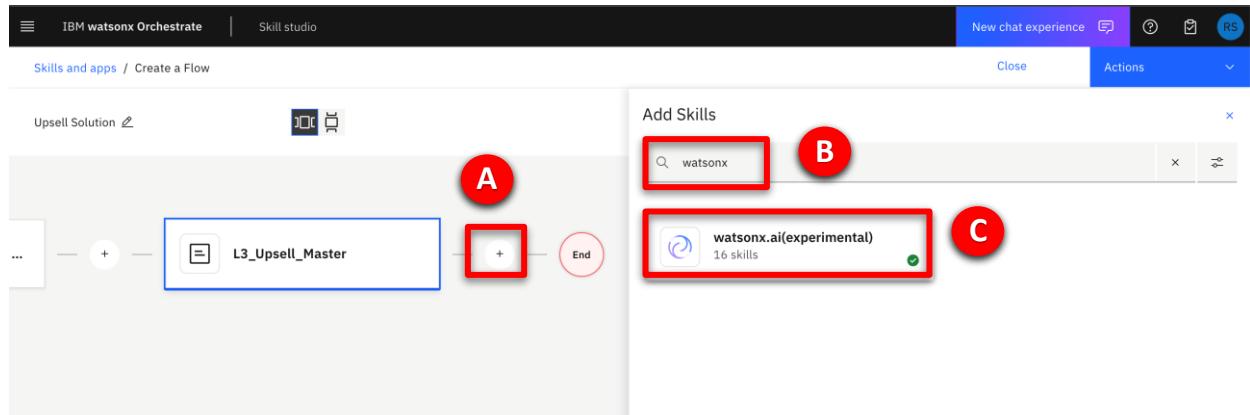


- Click **Add Skill +**.

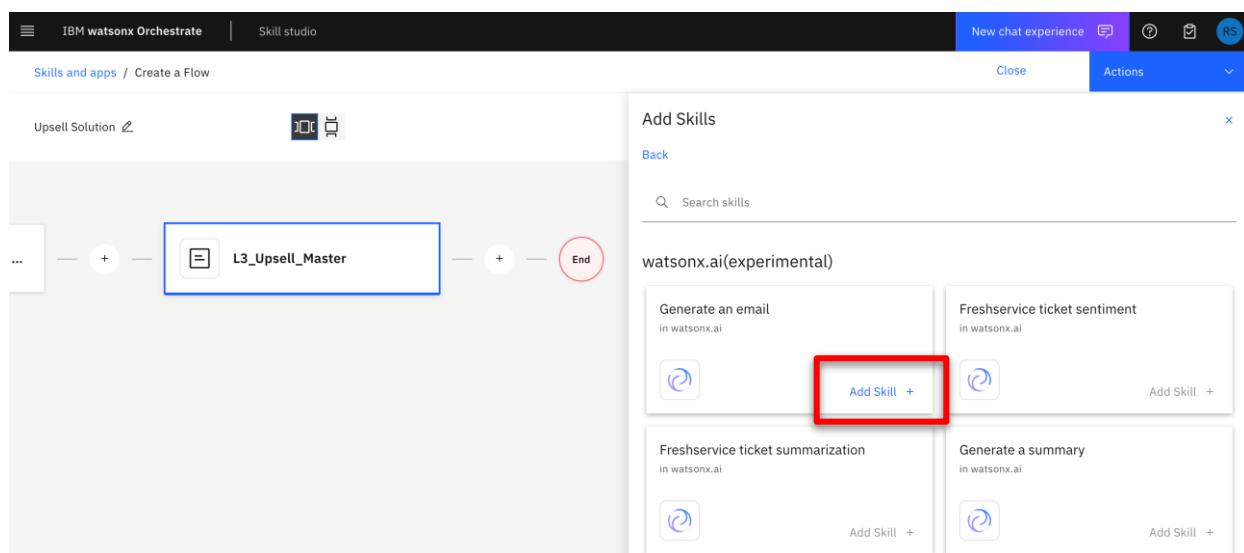


Next, you will add the generative ai skill in the skill flow. This skill will be used to generate the content in the outreach email to the customer.

- Click the + icon (A), then enter “watsonx” in the search field (B), then select the **watsonx.ai (experimental)** application (C).

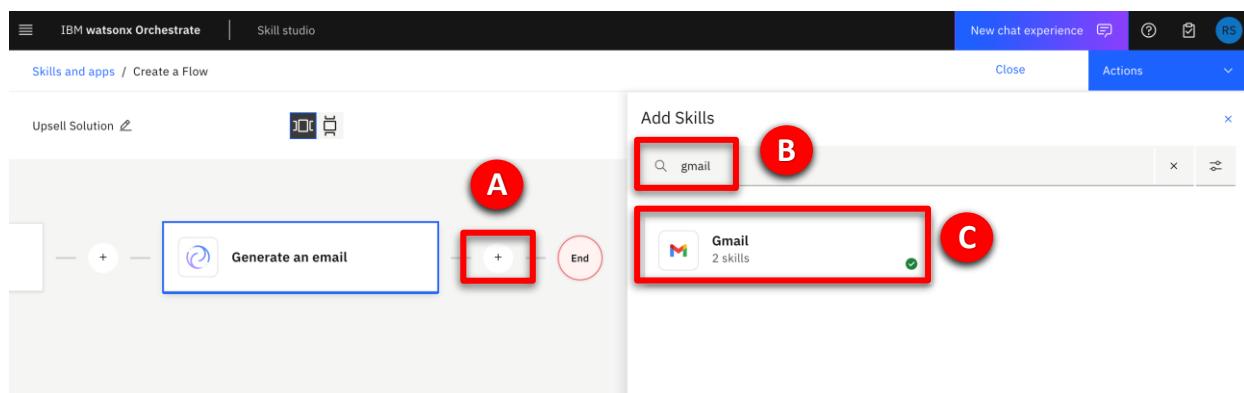


11. Select the **Add Skill** button on the **Generate an email** skill.

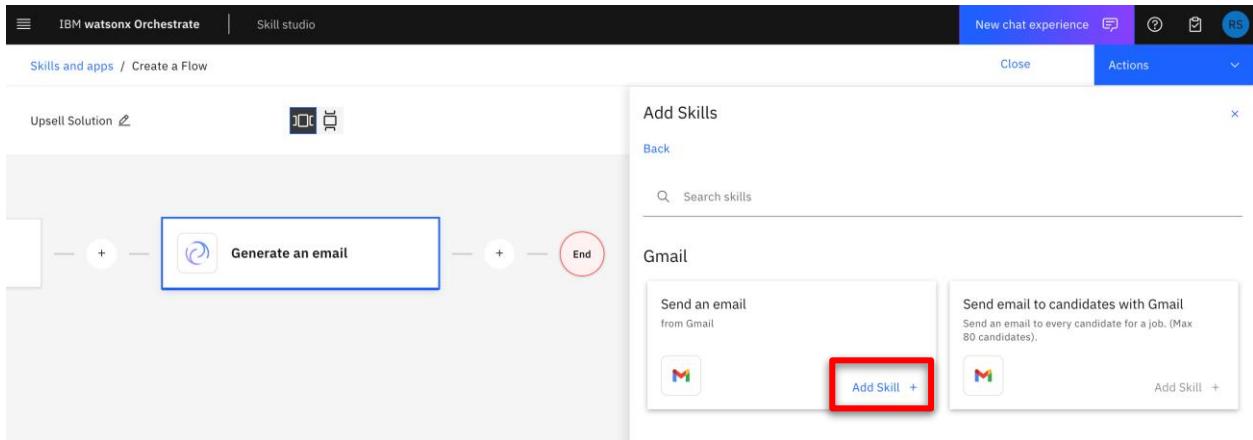


Next, you will add the Gmail skill that will be used to send an email.

12. Click the **+** icon (A), then enter “gmail” in the search field (B), then select the **Gmail** application (C).

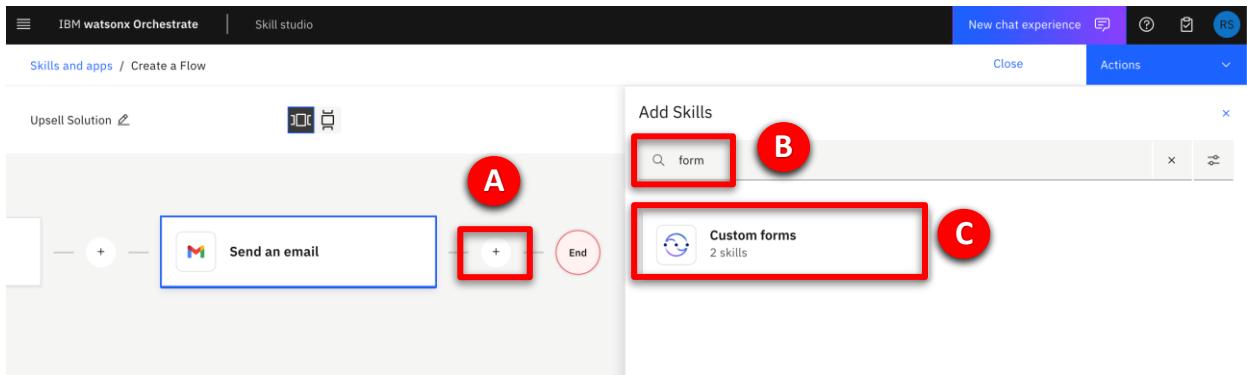


13. Select the **Add Skill +** button on the **Send an email** skill.

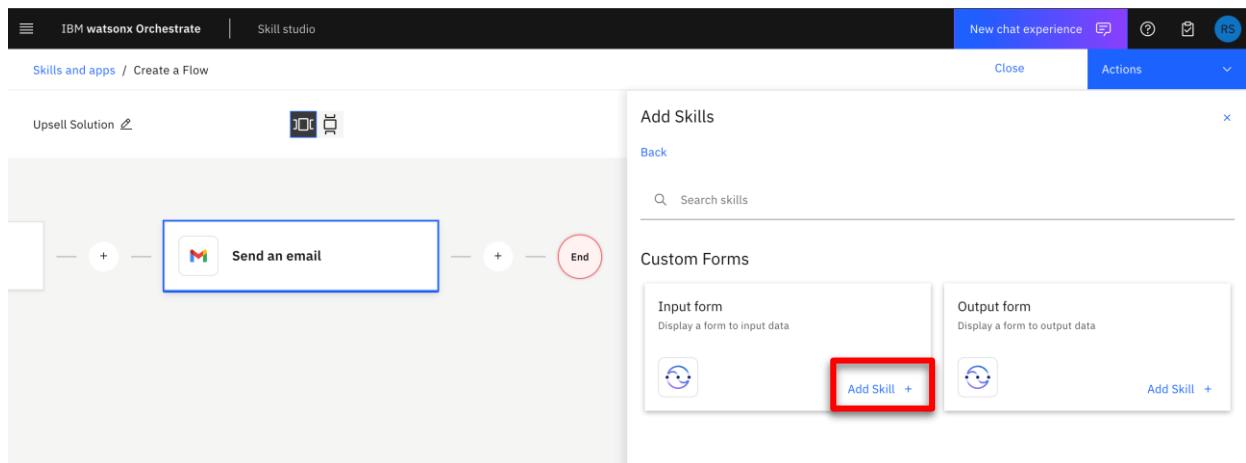


Now you will configure a notification to let the user know that the email has been sent.

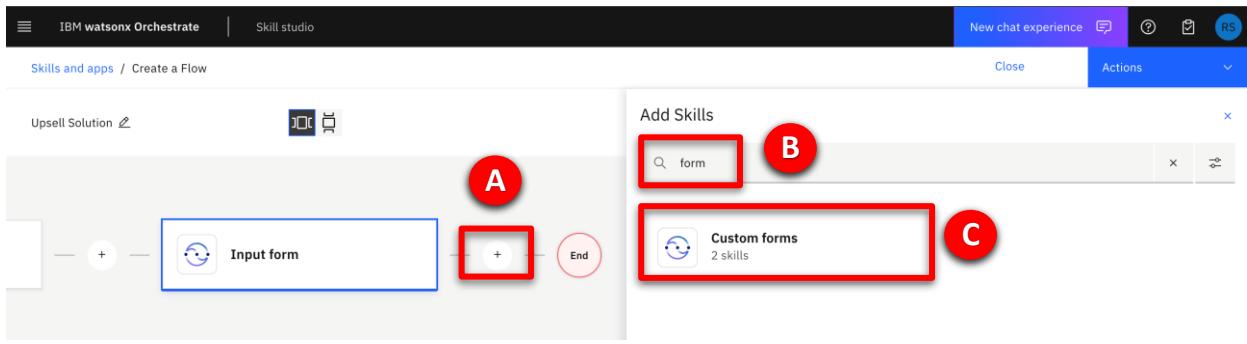
14. Click the **+ icon (A)**, then enter “form” in the search field **(B)**, then select the **Custom forms** application **(C)**.



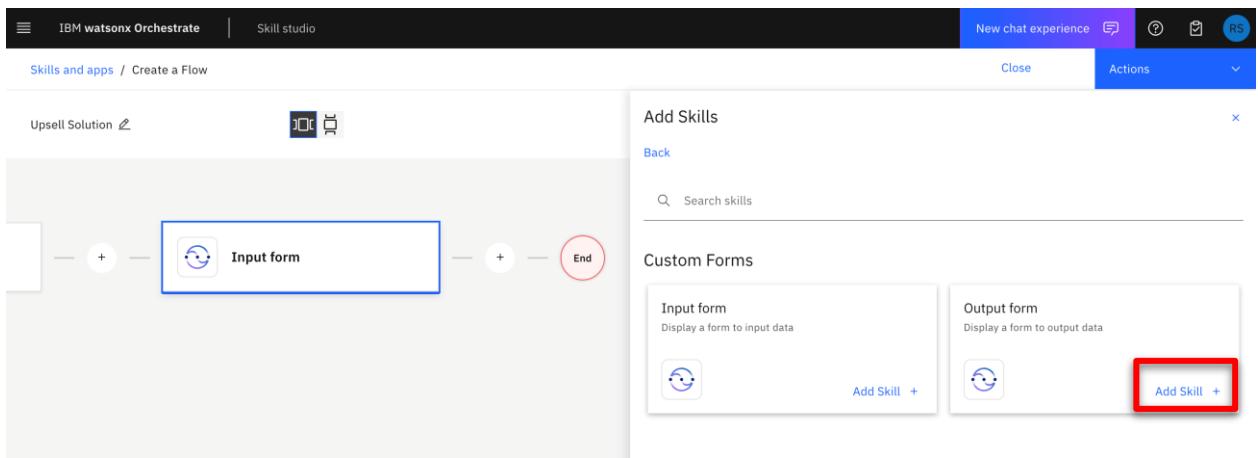
15. Select the **Add Skill +** button on the **Input form** skill.



16. Click the **+ icon (A)**, then enter “form” in the search field **(B)**, then select the **Custom forms** application **(C)**.



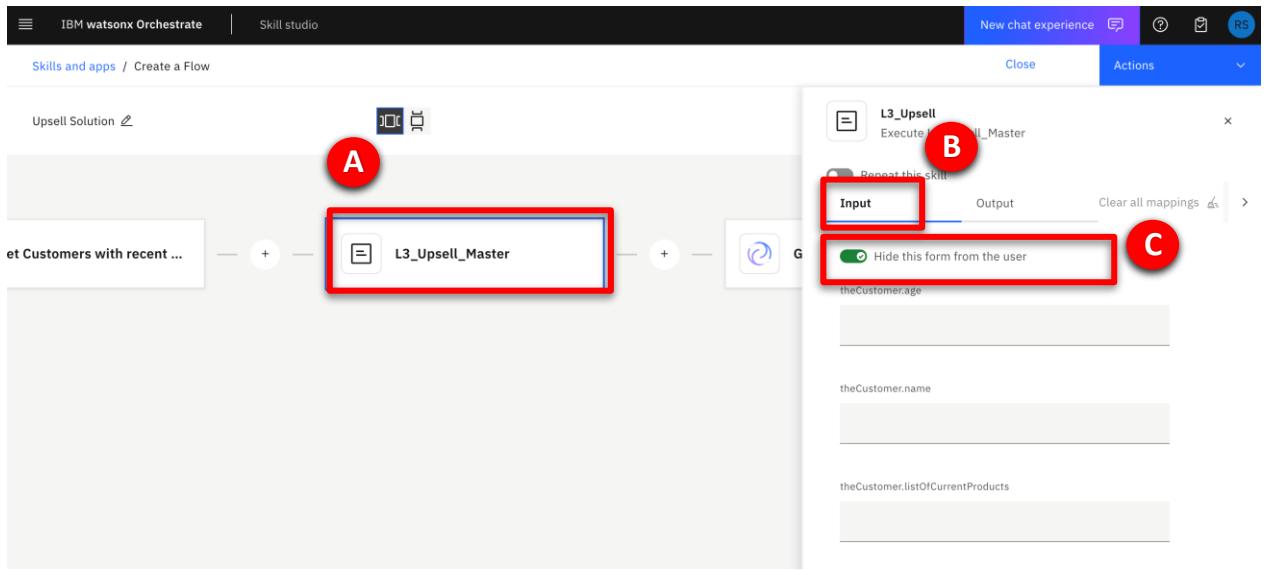
17. Select the **Add Skill +** button on the **Output form** skill.



## 4.3 Configuring the skill-flow

Next, you will configure each skill within the skill flow. This includes items like passing data between flows, hiding certain forms, and defaulting certain values. You will start by configuring the upsell decision service skill added previously.

1. Select the decision skill **Product Upsell** skill (A), select the **Input** tab (B), and turn on the **Hide this form from the user** toggle (C).



You will now begin mapping the data into the decision service that is being retrieved from your CRM system.

- Click the **Input** tab and then click inside the **theRecentChange** field.

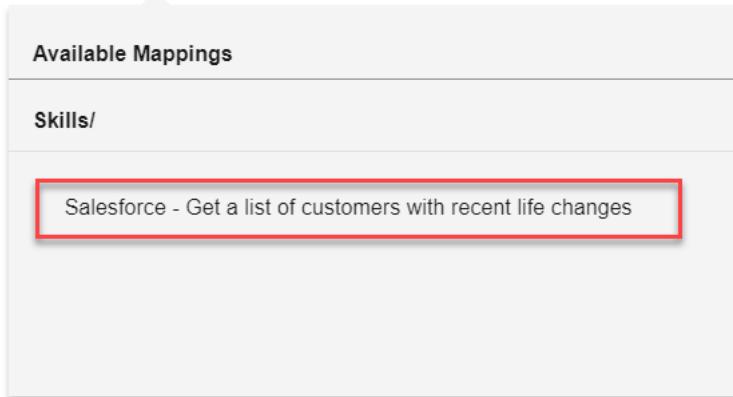
A close-up view of the "Input" tab in the skill configuration panel. The "theRecentChange" field is highlighted with a red box. Above the input fields, there are two toggle switches: "Repeat this skill" (unchecked) and "Hide this form from the user" (unchecked). Below the input fields are three mapping fields: "theCustomer.age", "theCustomer.name", and "theCustomer.listOfCurrentProducts".

- Within the **Available Mappings** panel, click the skill that contains the value we need as an input.

**Available Mappings**

Skills/

Salesforce - Get a list of customers with recent life changes



4. Scroll through the available values and select **Recent\_Change\_\_c**.

Mapping data for "theRecentChange"

Skills/VV - Salesforce - Get customers with recent life changes-Get a list of customers with recent life changes from Salesforce

records {#}

items {#}

EventType\_\_c abc

records {#}

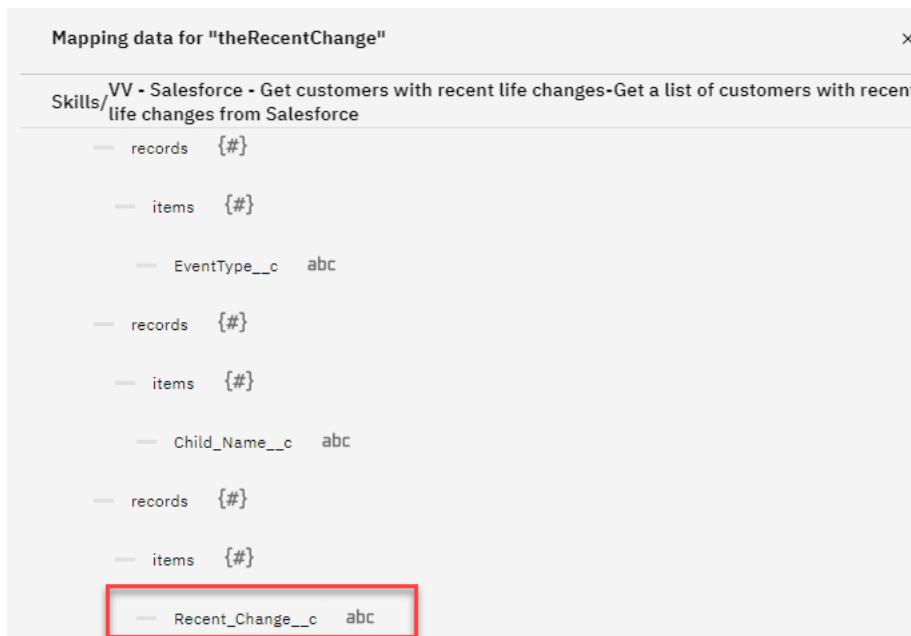
items {#}

Child\_Name\_\_c abc

records {#}

items {#}

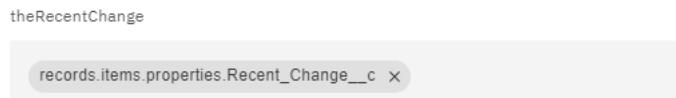
Recent\_Change\_\_c abc



5. The path to the value is now mapped and shown in the field.

theRecentChange

records.items.properties.Recent\_Change\_\_c

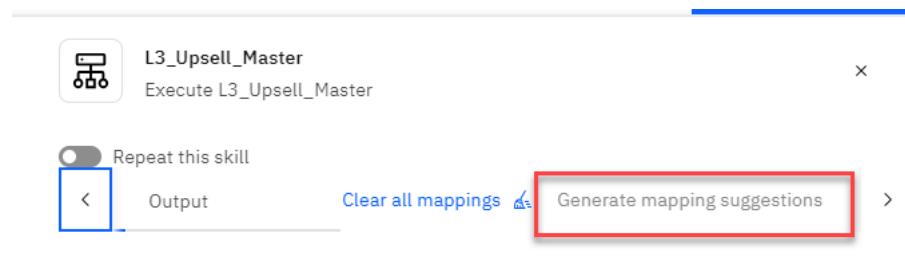


6. Repeat this exercise to map the other two values – **theCustomer.age** and **theCustomer.name**. Do NOT select any Operators for the mappings.

theCustomer.age  
records.items.properties.Child\_Age\_\_c

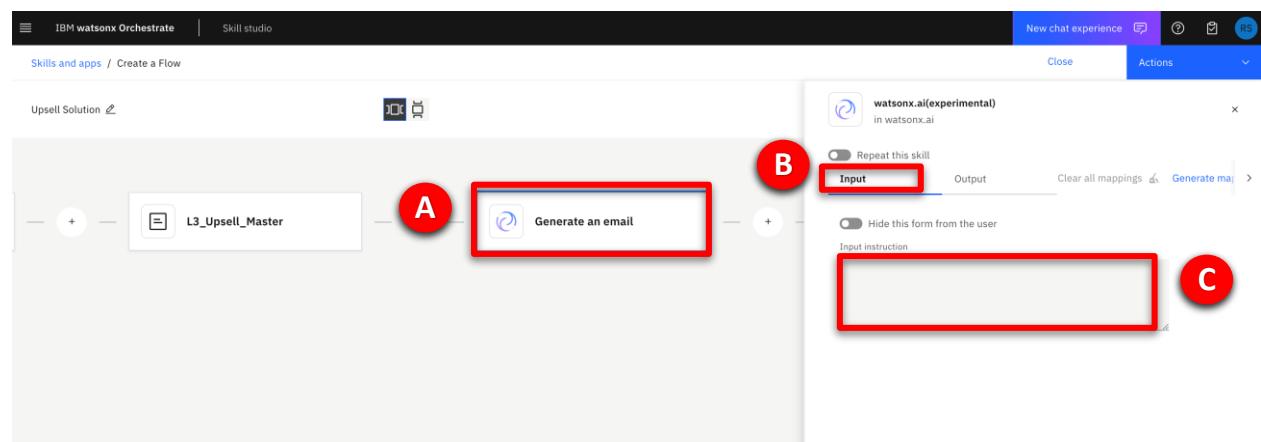
theCustomer.name  
records.items.properties.Name

You can also use “Generate mapping suggestions” feature to let watsonx Orchestrate map values for you.

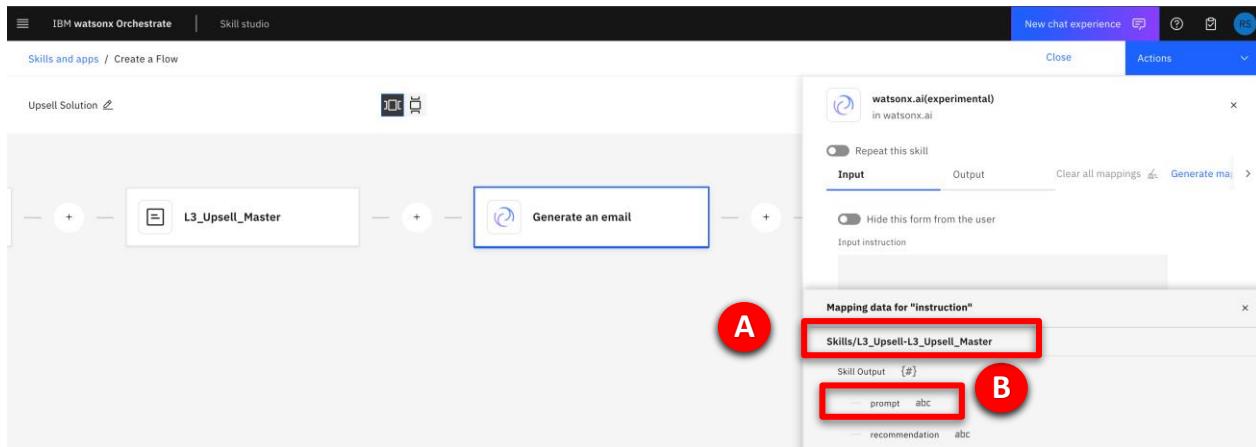


Next you will configure the Generate an email skill.

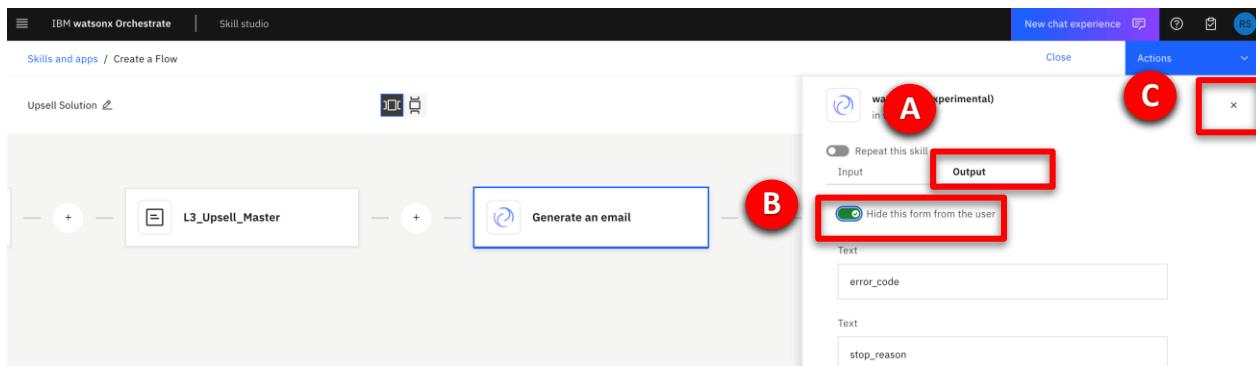
7. Select the **Generate an email** skill (**A**), click on the **Input** tab (**B**), and click on the **Input Instruction** field (**C**).



8. Select the **L3\_Upsell\_Master** (**A**) skill and select the **prompt** variable (**B**).

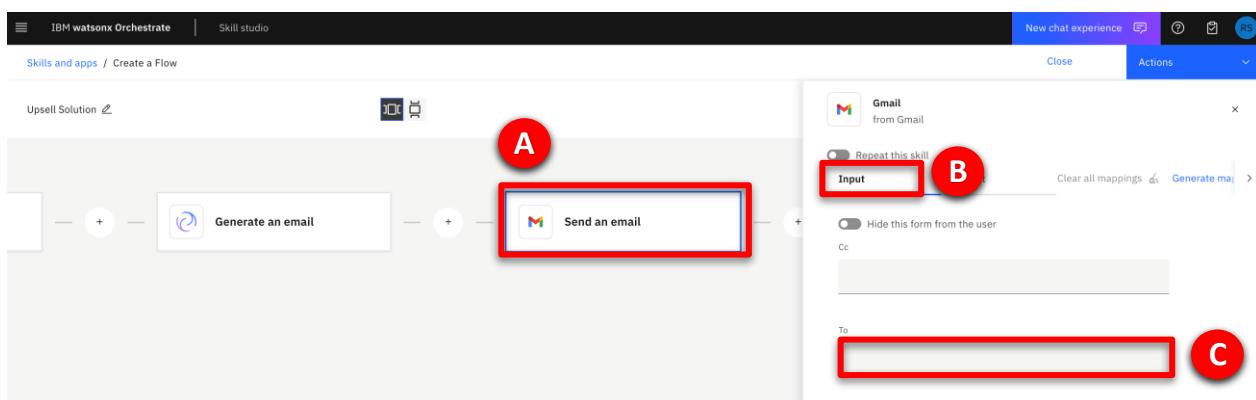


9. Select the **Output** tab (**A**) and turn on the **Hide this form from the user** toggle (**B**). When complete, click the **X** in the top right corner (**C**).

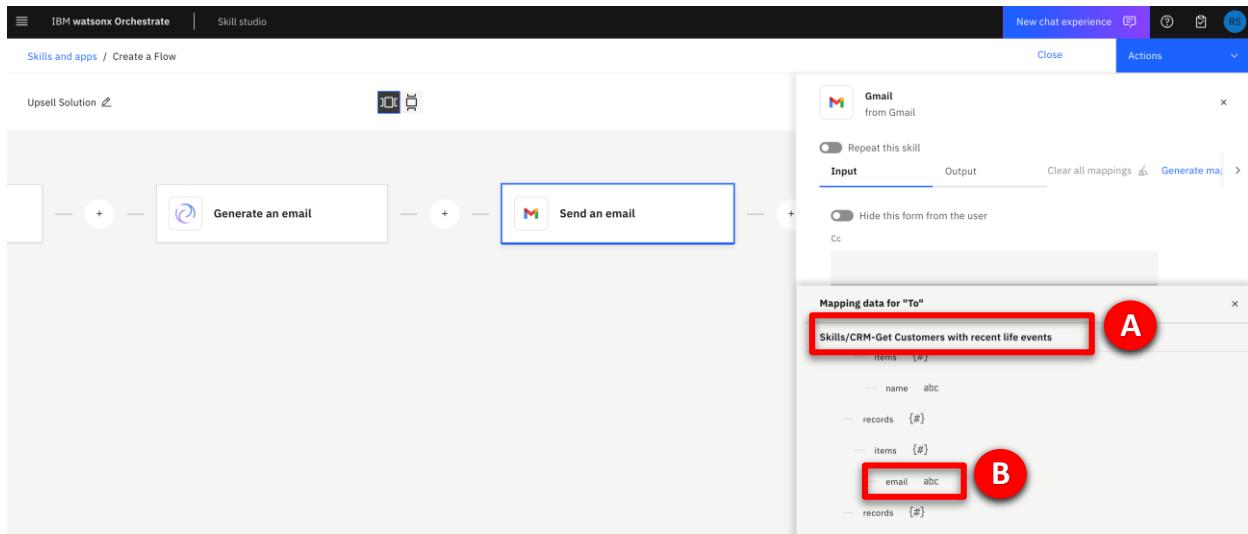


Next, you will configure the Send an email skill.

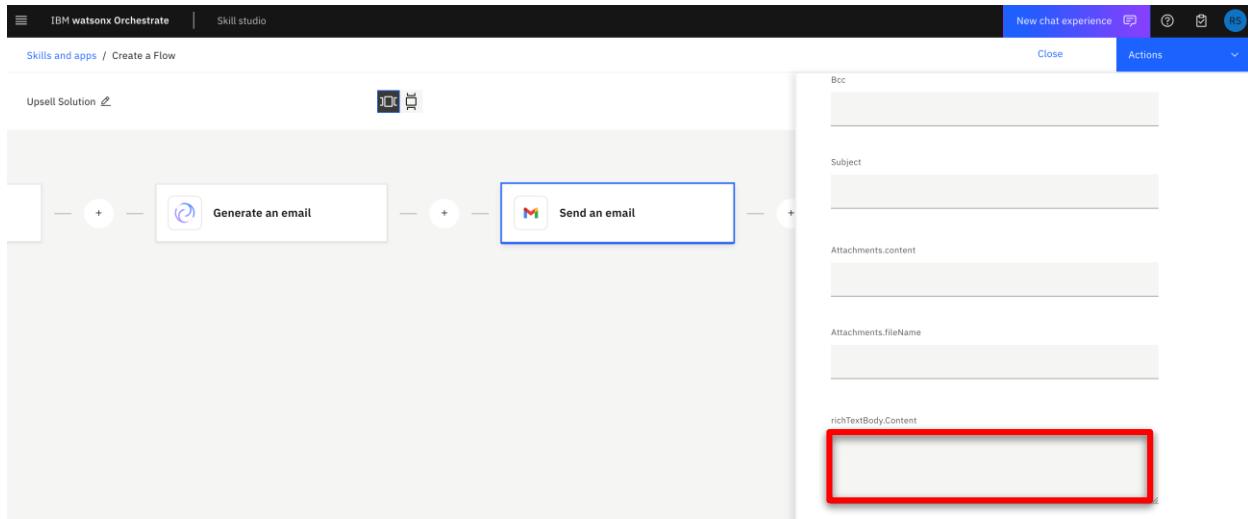
10. Select the **Send an email** skill (**A**), click on the **Input** tab (**B**), and click the **To** field (**C**).



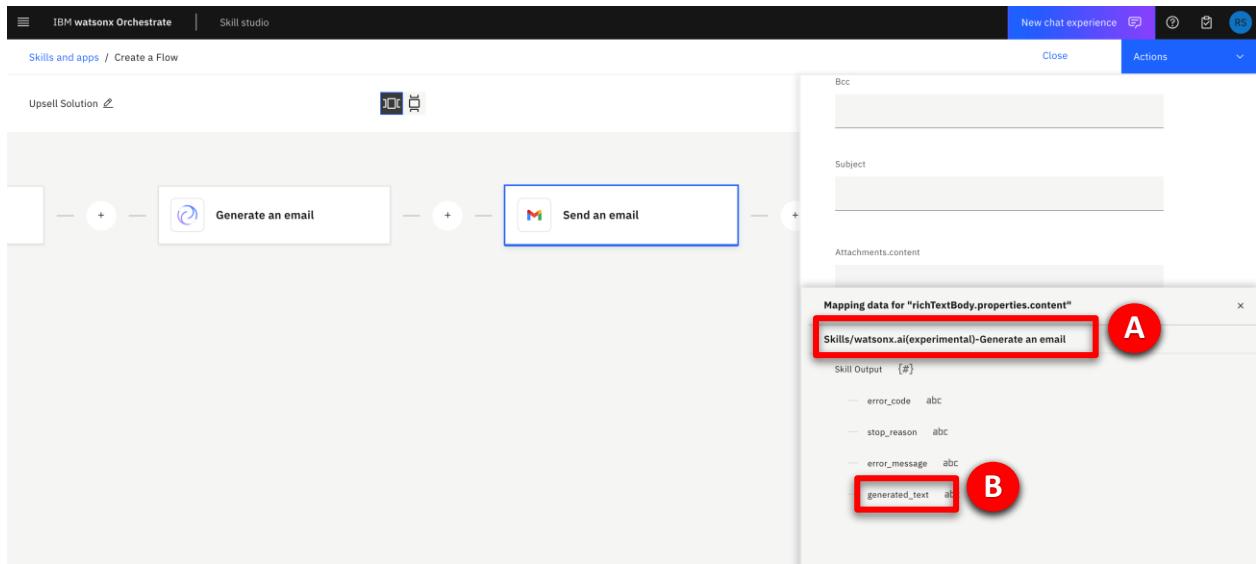
11. Select the **Get customers with recent life events** skill (**A**) and scroll down to select the **email** variable (**B**).



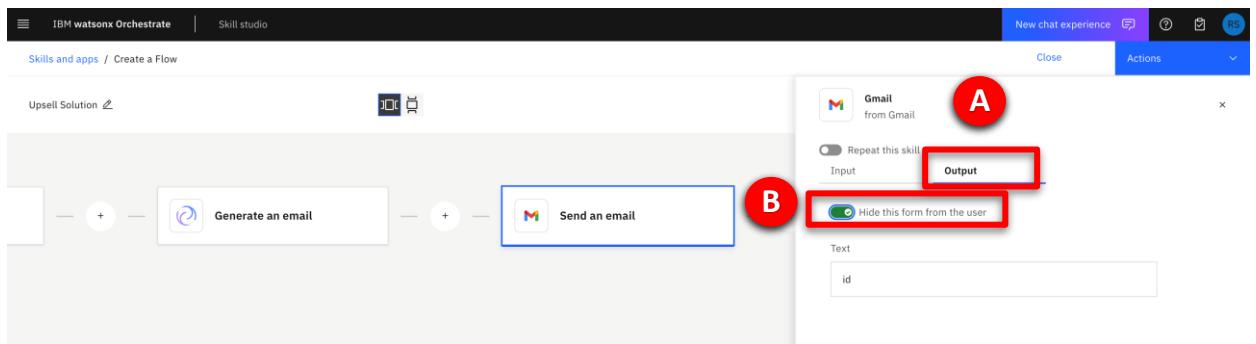
12. Scroll down and click the **richTextBody.Content** field.



13. Select the **Generate an email** skill (A) and select the **generated text** variable (B).

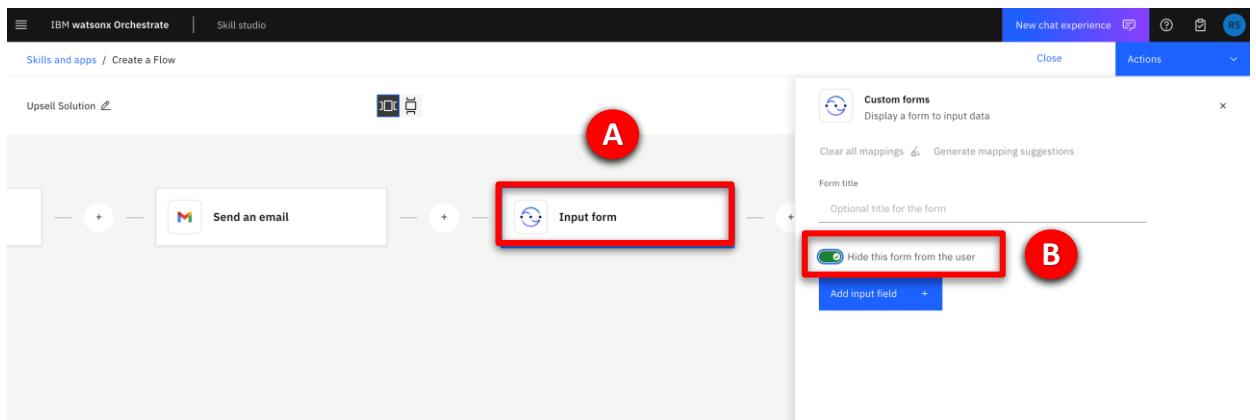


14. Click on the **output** tab (A) and turn on the **Hide this form from the user** toggle (B).

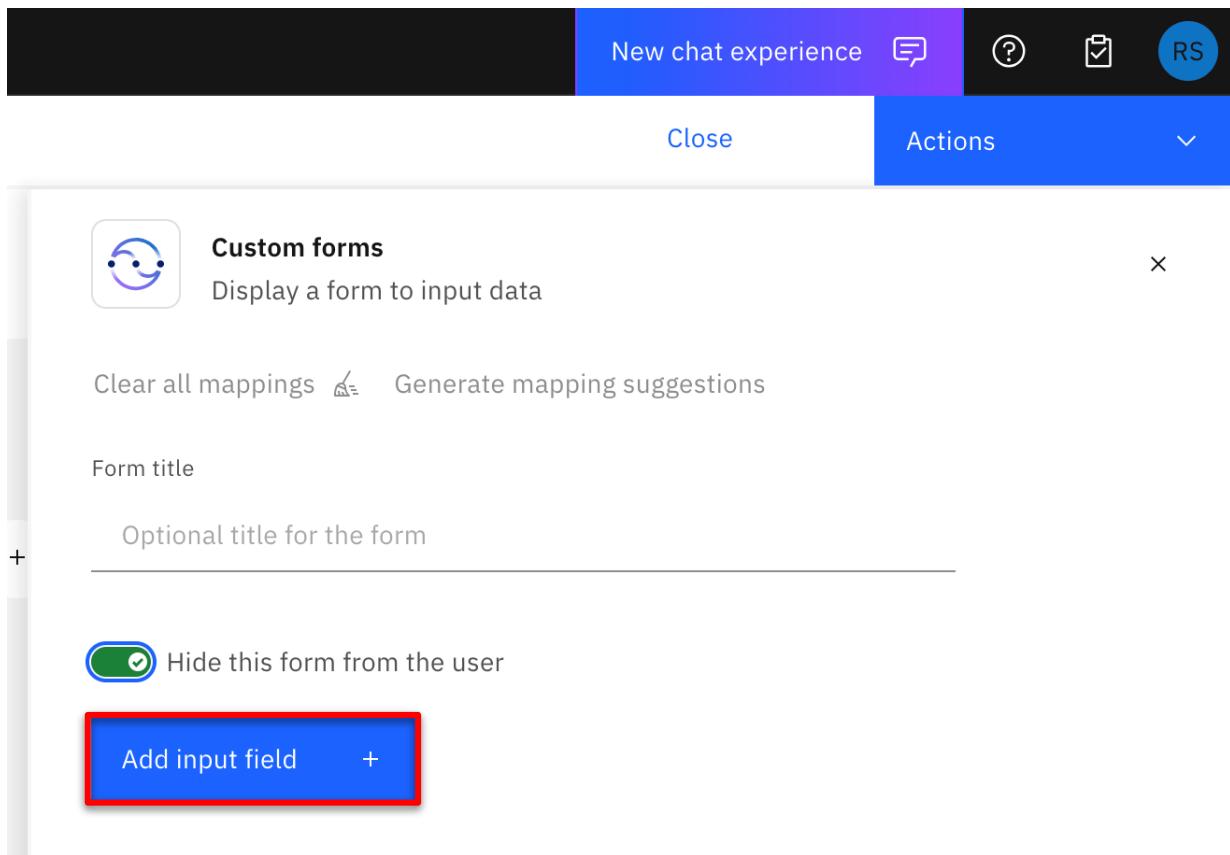


Lastly, you will configure a notification to show that the email has been sent.

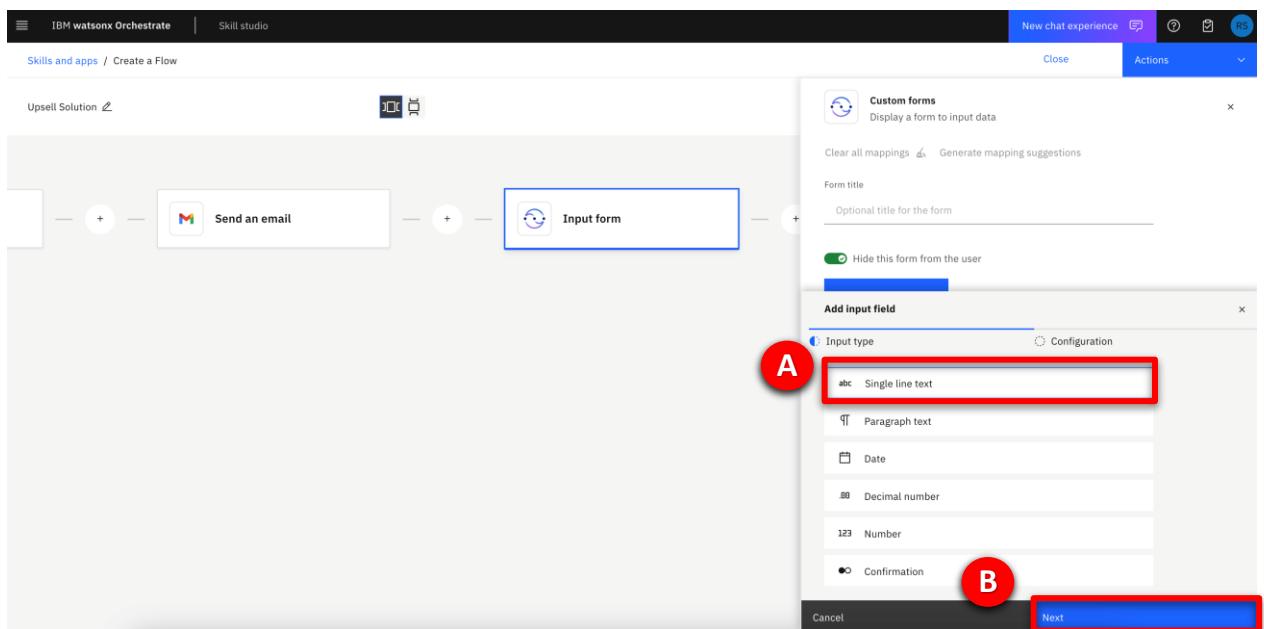
15. Select the **Input form** skill (A) and turn on the **Hide this form from the user** toggle (B).



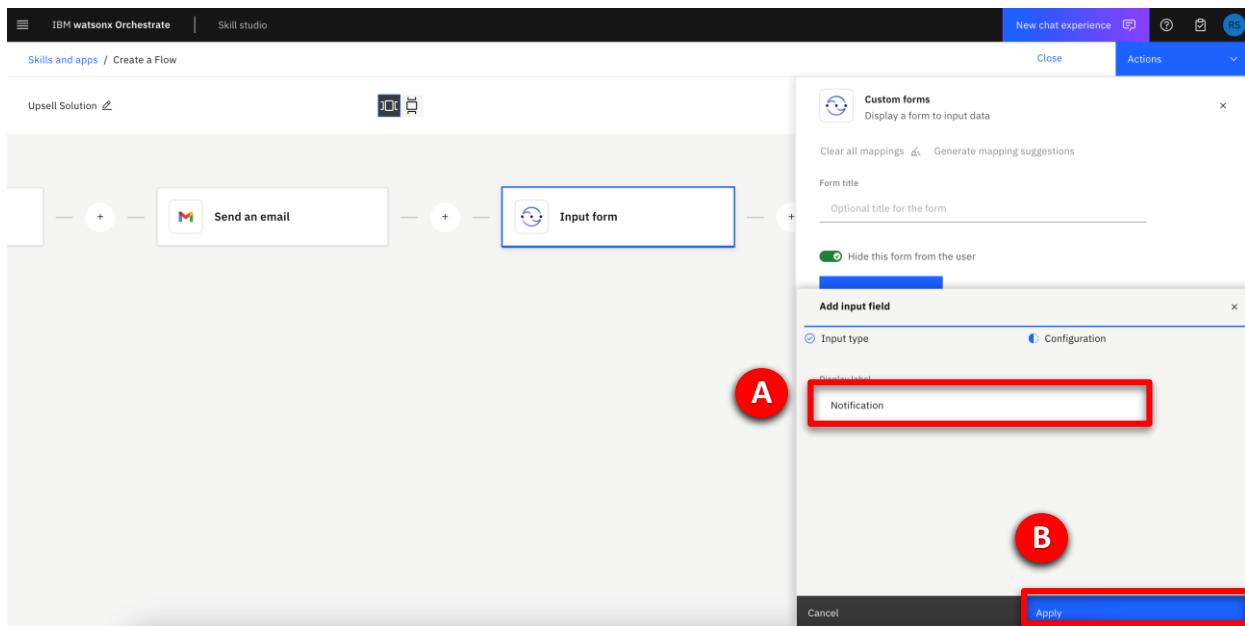
16. Click the **Add input field** button.



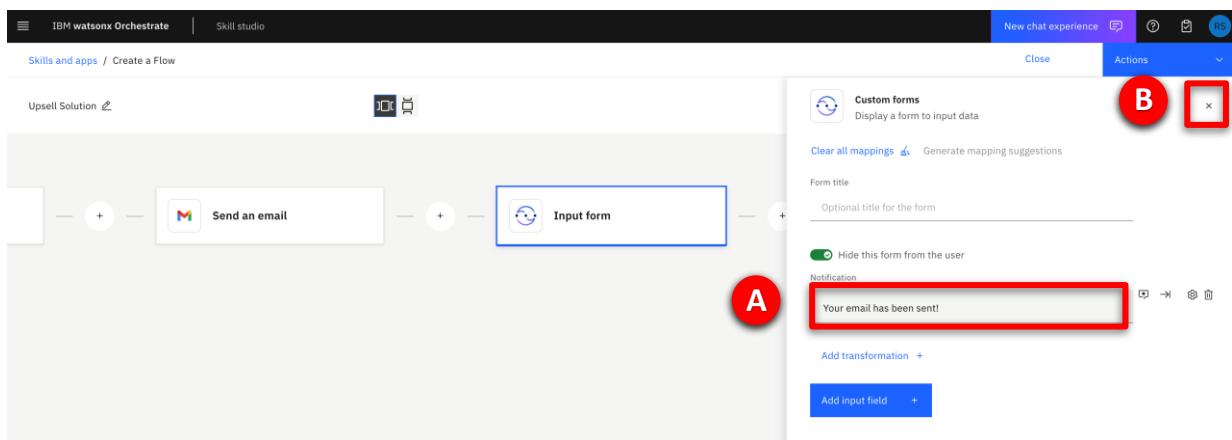
17. Select the **Single line text** option (A) and click **Next (B)**.



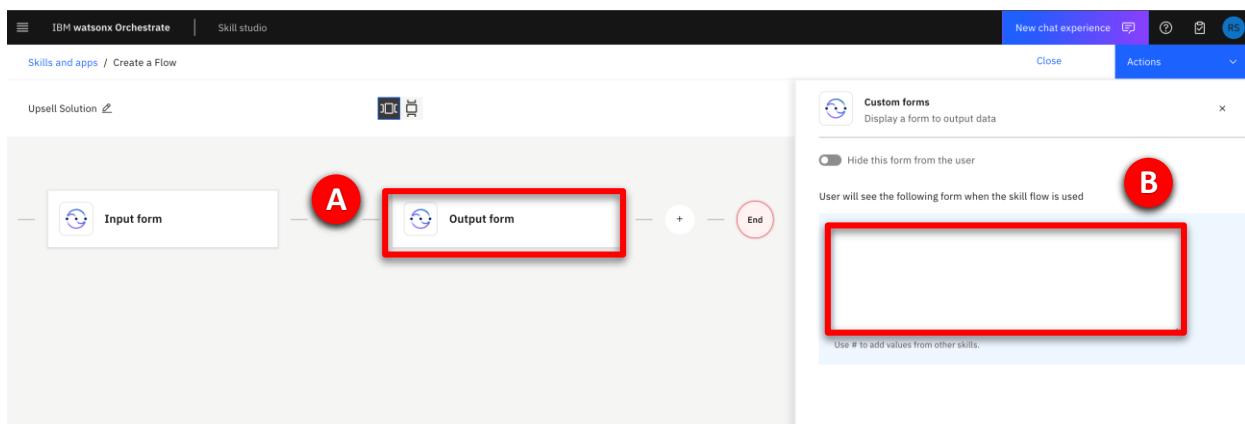
18. In the **Display label** text box (A), type “Notification” and click **Apply (B)**.



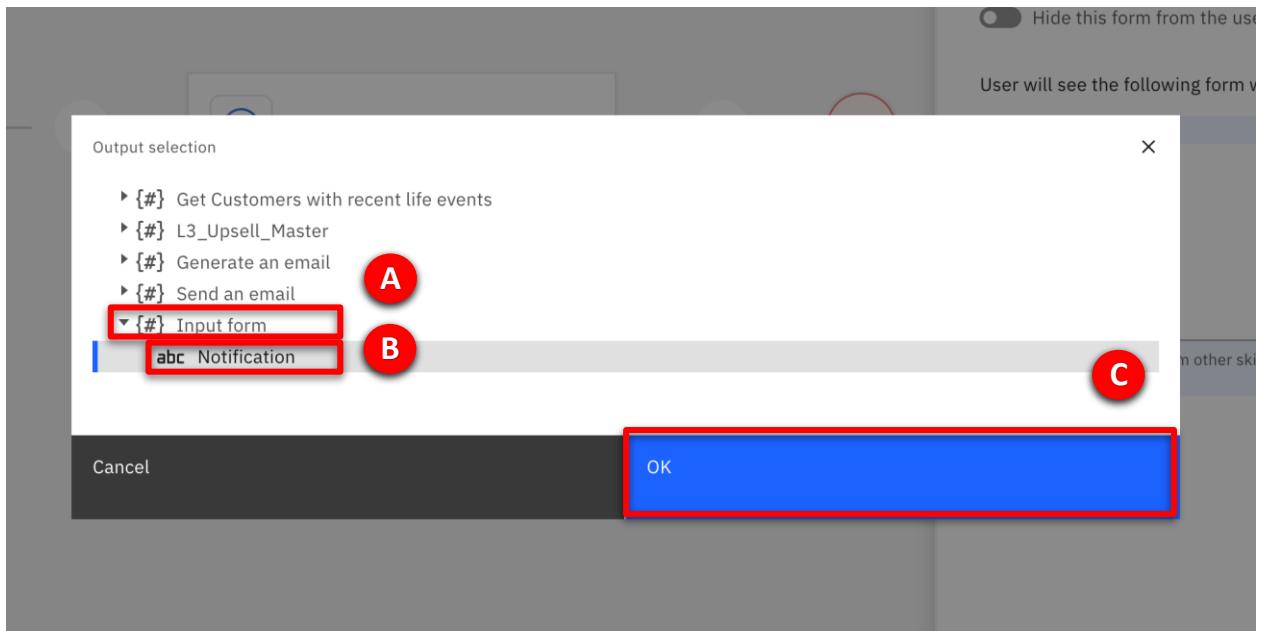
19. Hover your mouse over the Notification field (**A**), then click the pencil icon (not shown) so you can provide a default value. Enter “Your email has been sent!” into the notification field (**A**). Once complete, click the **X** button in the top right corner (**B**).



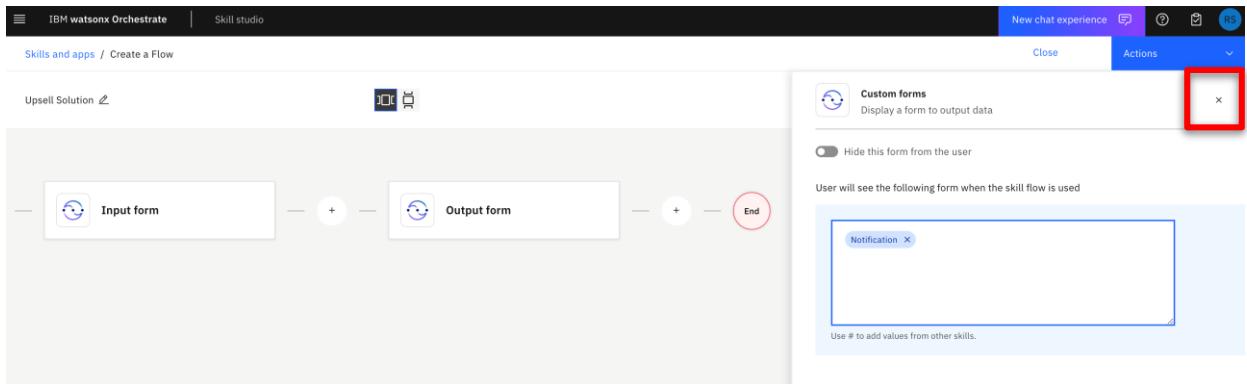
20. Select the Output form skill (**A**) and select the text box (**B**).



21. Enter “#” into the text box and when the **Output selection** window appears select Input form (**A**), then select the Notification variable (**B**) and click **OK** (**C**).

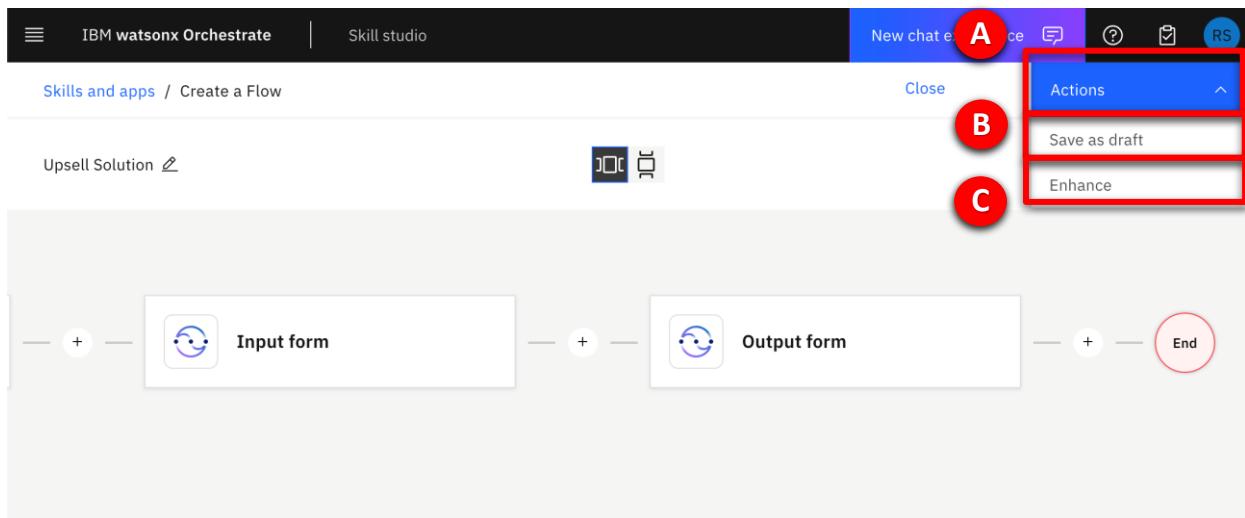


22. Click the **X** in the top right corner.



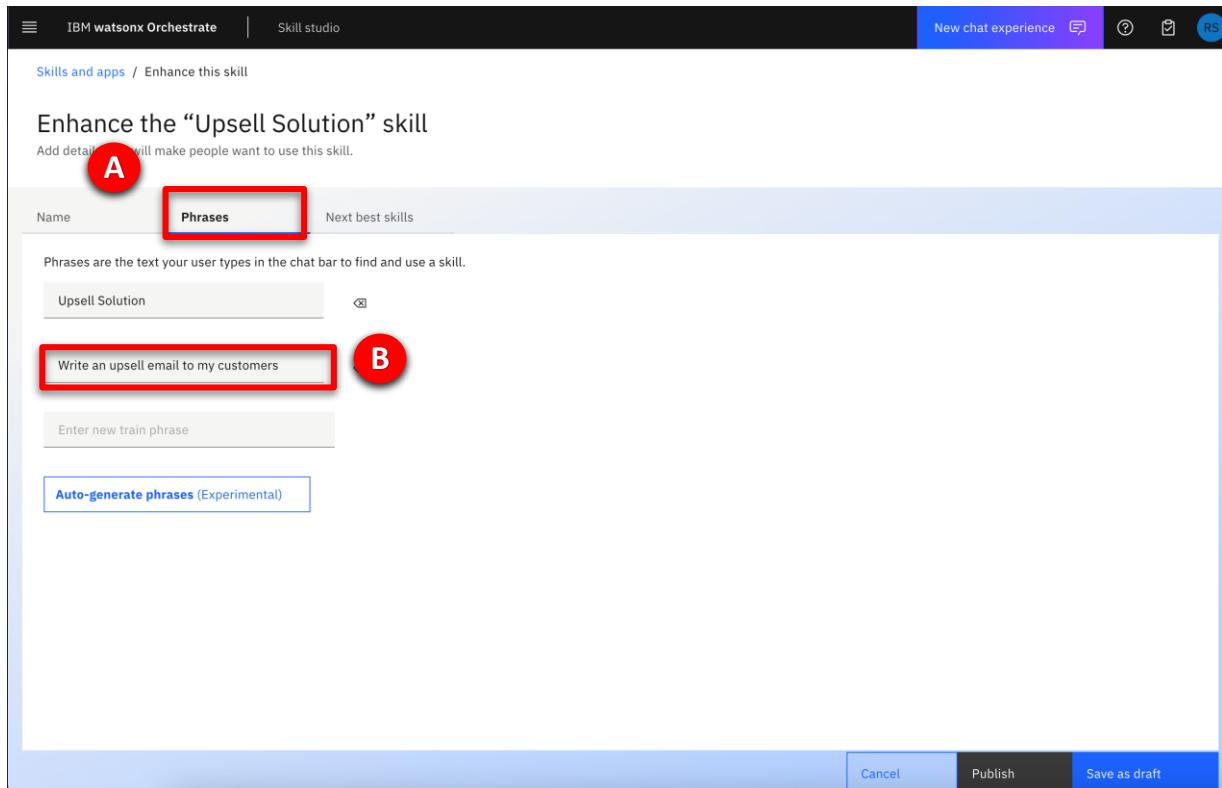
Before the new skill flow can be used, it must be enhanced and published. Enhancement allows you to fine-tune how the skill is presented and train the conversational interface to recognize when the skill should be used. First, save the skill flow.

23. In the top right corner, click the **Actions** dropdown (**A**), select **Save as draft** (**B**). Click the **Actions** dropdown (**A**) again and click **Enhance** (**C**).



Using the Enhance window, phrases are entered that are used to train the conversational interface to recognize when the skill should be used. Multiple phrases can be entered to train the conversational interface. In a real project, several alternative phrases would be used to train the AI to ensure the skill is activated.

24. Select the **Phrases** tab (**A**) and enter a phrase into the text box (**B**) that will be used to trigger the skill flow. For example: “Write an upsell email to my customers.” Once the phrase has been entered, hit the enter key.



25. Click **Publish**.

Skills and apps / Enhance this skill

## Enhance the “Upsell Solution” skill

Add details that will make people want to use this skill.

Name	Phrases	Next best skills
	Phrases are the text your user types in the chat bar to find and use a skill.	
	Upsell Solution	<input type="button" value="X"/>
	Write an upsell email to my customers	<input type="button" value="X"/>
	Enter new train phrase	
	<a href="#">Auto-generate phrases (Experimental)</a>	

Cancel Publish Save as draft

For the AI assistant to be able to access the new skill flow, you must add it to your personal skill set. This is similar the process of adding the individual skills detailed in the previous steps.

26. Click the navigation hamburger menu (A) and select **Skill Catalog** (B).

Gerry!

Get ready to take your AI skills to the next level.

→

**AI assistant builder**

Boost productivity and customer care by creating conversational experiences.

→

**Skill studio**

Build the skills your team needs to get their work done more quickly.

→

27. In the search bar type “skill flows” (A), and hit enter, then select the **Skill flows** application (B).

The screenshot shows the 'Skill catalog' page. At the top, there's a navigation bar with 'IBM Watsonx Orchestrate', language options ('English'), a 'New chat experience' button, and user icons. Below the bar, the title 'Skill catalog' is displayed, followed by the sub-instruction: 'Skills are grouped by app. Select an app to see all the skills that use that app.' A 'Personal skills' button is visible. The main area is titled 'Apps' and lists several applications: 'Gmail' (1 skill), 'Candidate sourcing with ThisWay' (3 skills), 'Microsoft Outlook' (1 skill), 'Get compensation information fro...' (3 skills), 'Skill flows' (168 skills), and 'Workday HCM' (2 skills). The 'Skill flows' card is highlighted with a red box and has a red circle labeled 'A' above the search bar and another red circle labeled 'B' next to the 'Add skill +' button.

28. In the search bar (**A**), type “Upsell [YOUR LAST NAME]” and hit enter. Click the **Add skill +** button (**B**) on your skill flow. For example, someone named Rebecca Smith would select “Upsell Smith.”

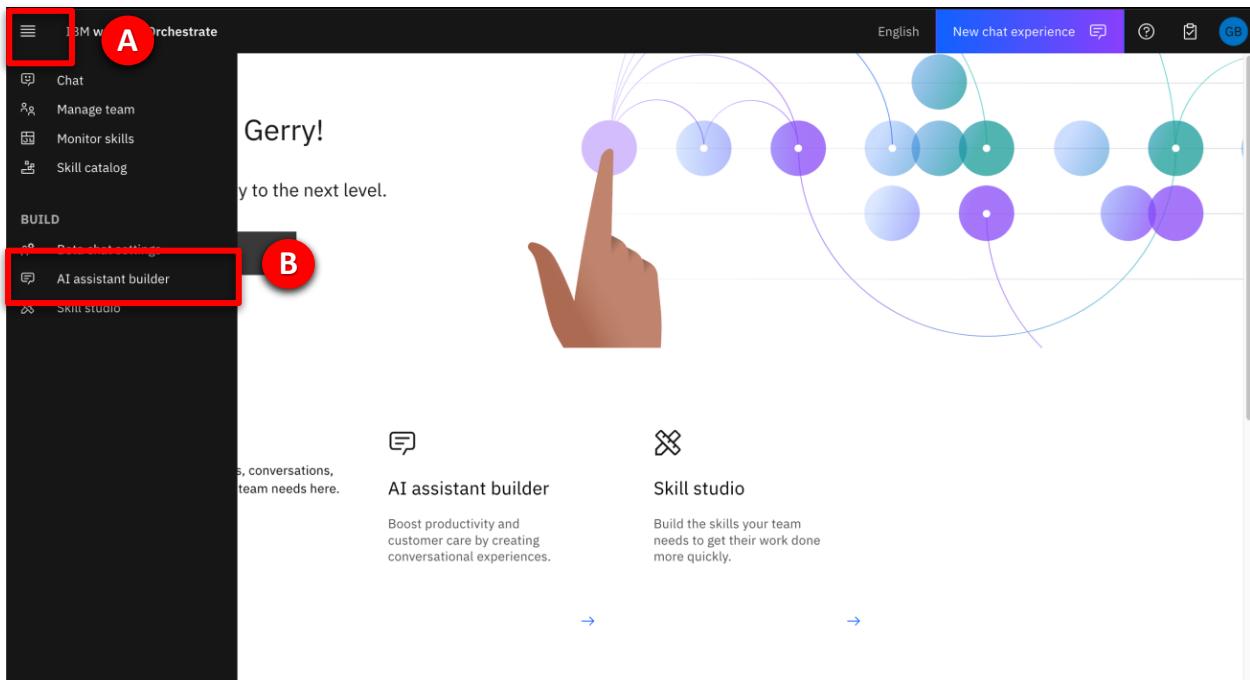
The screenshot shows the 'Skill flows (1)' page. At the top, there's a navigation bar with 'Skill catalog /', language options ('English'), a 'New chat experience' button, and user icons. Below the bar, the title 'Skill flows (1)' is displayed. A 'Personal skills' button is visible. The main area is titled 'Skill flows' and shows a single item: 'Upsell Solution'. To the right of this item is a red box around the 'Add skill +' button, and a red circle labeled 'B' is placed next to it. A red box also surrounds the search bar at the top, and a red circle labeled 'A' is placed above it.

# 5 AI Assistant

In Watsonx Orchestrate, you build the AI assistant by using AI assistant builder. AI assistant builder is a chat interface builder that helps to deploy an engaging and embedded chatbot experience. AI assistant builder integrates the power of large language models (LLMs) and conversational capabilities of Watsonx Assistant to enable responsive and interactive conversation between the users and Watsonx Orchestrate.

## 5.1 Creating an AI Assistant

1. Click the navigation hamburger menu (**A**) and select **AI assistant builder** (**B**).



2. Click the AI Assistant dropdown and select **Create new +**.

The screenshot shows the IBM Watsonx Orchestrate interface. At the top, there's a navigation bar with 'IBM Watsonx Orchestrate' and 'AI assistant builder'. Below it, a sub-header says 'AskSales Solution AI Assistant'. A red box highlights the 'AskSales Solution AI Assistant' text and the 'Create new' button below it. The main content area is titled 'AskSales Solution AI Assistant' and shows a message about a 'New release' (Conversational search is GA!). It also mentions a 'Build actions' section and a 'Customize your greeting' section. The 'Build actions' section has a sub-section for 'Enhance your assistant'.

AskSales Solution AI Assistant

Last updated on October 15, 2024 1:19:18 PM CDT

**New release**  
Conversational search is GA!

As of 3 May 2024, conversational search, our latest watsonx generative AI feature utilizing retrieval-augmented generation (RA), is generally available. [Learn more](#)

Your assistant now has new watsonx generative AI features! [Learn more](#) about intelligent information gathering.

Enhance your assistant

Further improve and customize your assistant with these recommendations.

**Build actions**  
Enhance and improve your assistant's actions.

**Customize your greeting**  
Welcome your users in a unique way that aligns with your brand.

3. In the **Assistant name** section (A), name your new assistant “[YOUR LAST NAME] AI Assistant” and click **Create Assistant** button (B). For example, someone named Rebecca Smith would enter “Smith AI Assistant.”

The dialog box is titled 'Create a new assistant'. It has a field for 'Assistant name' containing 'Smith AI Assistant' (marked with a red box and circled 'A'). Below it is a note: 'Your assistant name will be kept internally and not visible to your customers'. There's a 'Description (optional)' field with placeholder text 'Add a description for this assistant'. Under 'Assistant language', 'English (US)' is selected. At the bottom, there are 'Cancel' and 'Create assistant' buttons, with 'Create assistant' highlighted by a red box and circled 'B'.

Create a new assistant

Assistant name

Smith AI Assistant A

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

Description (optional)

Add a description for this assistant

Assistant language

English (US) ▼

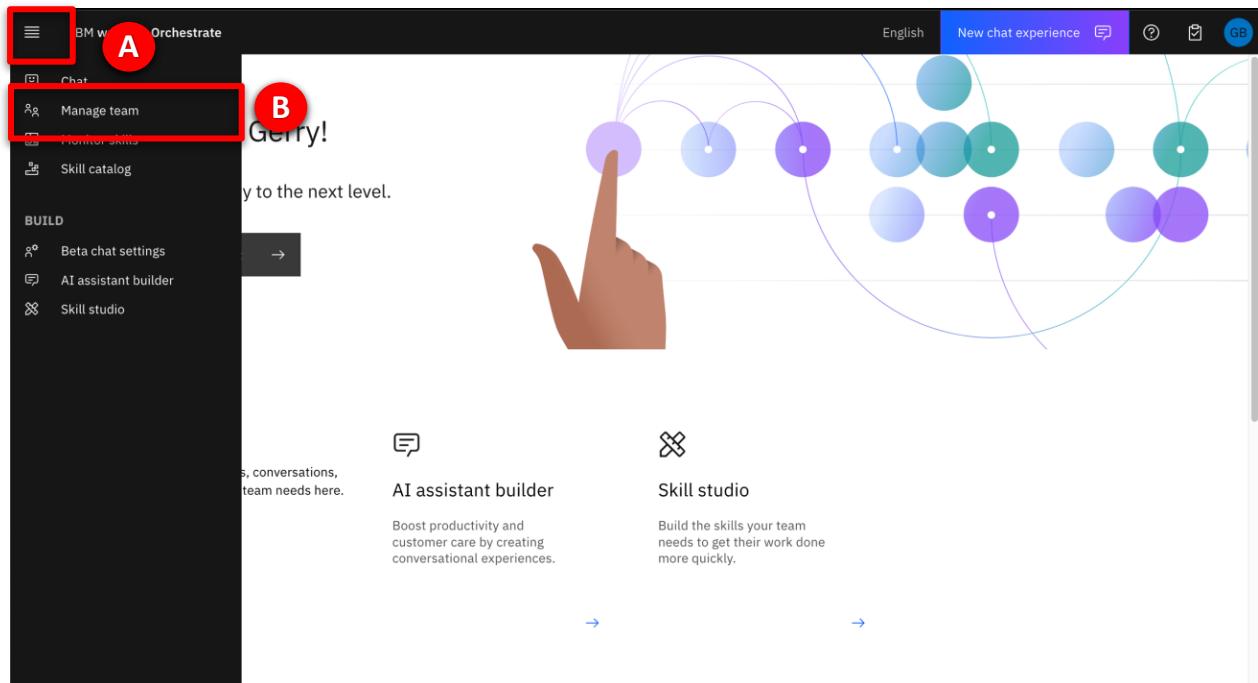
This is the language your assistant will speak.

Cancel B Create assistant

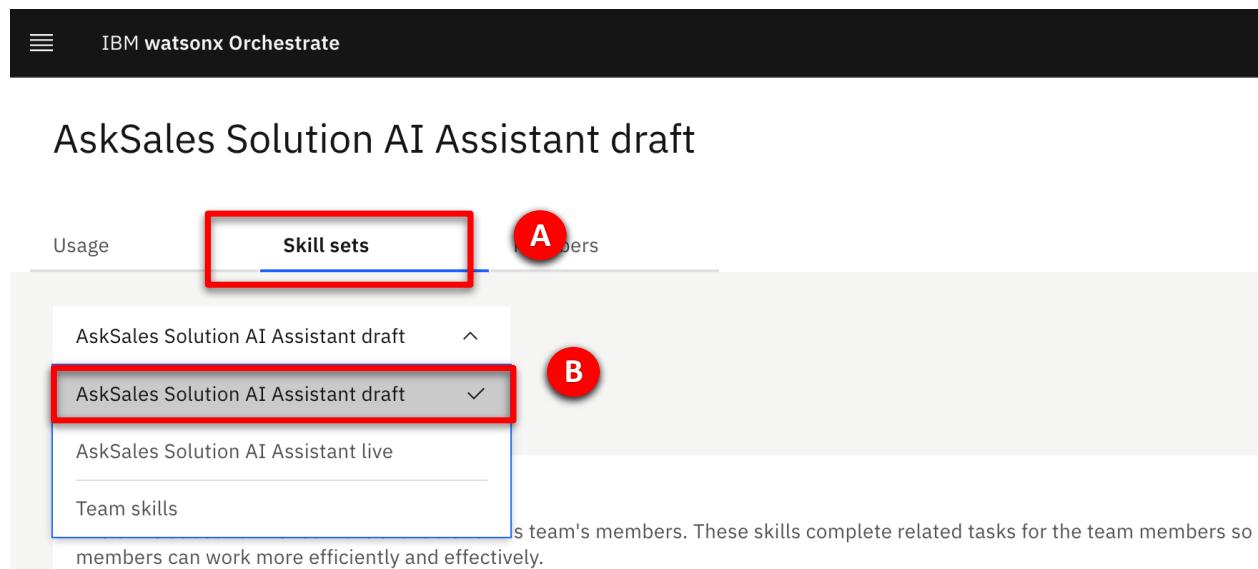
## 5.2 Add skill credentials to the draft version of your AI Assistant

For your AI assistant to connect to the target applications (CRM system, watsonx.ai platform, and Gmail) we must provide credentials for the AI assistant to use. First you will add these credentials to the draft version of the AI assistant. This will allow us to create the connection in our authoring environment (AI Assistant Builder). Once complete you will then add those same credentials to the live environment to use the assistant from the agentic chat interface detailed later in the lab.

1. Click the navigation hamburger menu **(A)** and select **Manage Team (B)**.



2. Select the **Skill sets** tab **(A)** and in the skill set drop down selection menu, select the **draft** version of your newly created AI assistant **(B)**. For example, someone named Rebecca Smith would select Smith AI Assistant draft.



- Select the **Connections** tab (A), type “watsonx.ai” in the search bar (B), and hit enter. Click on the action menu (C) next to the **watsonx.ai (experimental)** application and select the **Connect app** button (D).

AskSales Solution AI Assistant draft

96 seats remain (96/100)

Skills      **Connections**      Members

Watsonx.ai(experimental)      16      Not specified

Items per page: 5      1-1 of 1 items

Connect app

- Select **Team credentials** (A) and click the **Connect app** button (B).

AskSales Solution AI Assistant draft

Skills      **Connections**      Members

Watsonx.ai(experimental)      16

Items per page: 5      1-1 of 1 items

Connect to watsonx.ai(experimental)

Member credentials

Each team member uses their own credentials to connect to this app and use its skills.

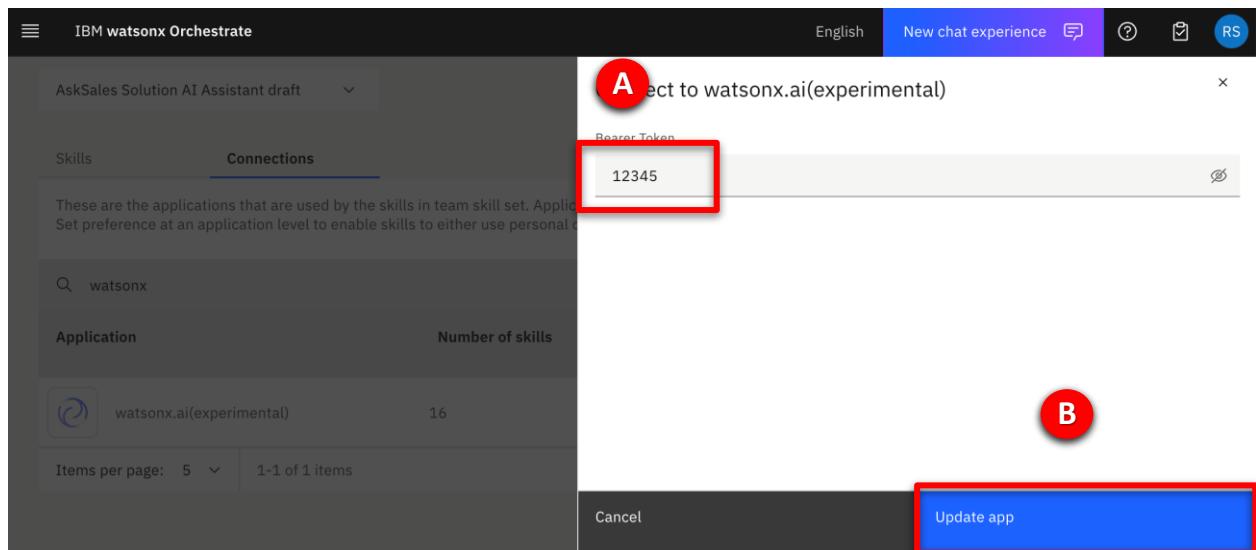
Team credentials

The admin sets the credentials each team member uses to connect to this app and use its skills.

You selected **Team credentials** for the credential type. Click **Connect app** to provide the credentials your team will use and to connect to the app.

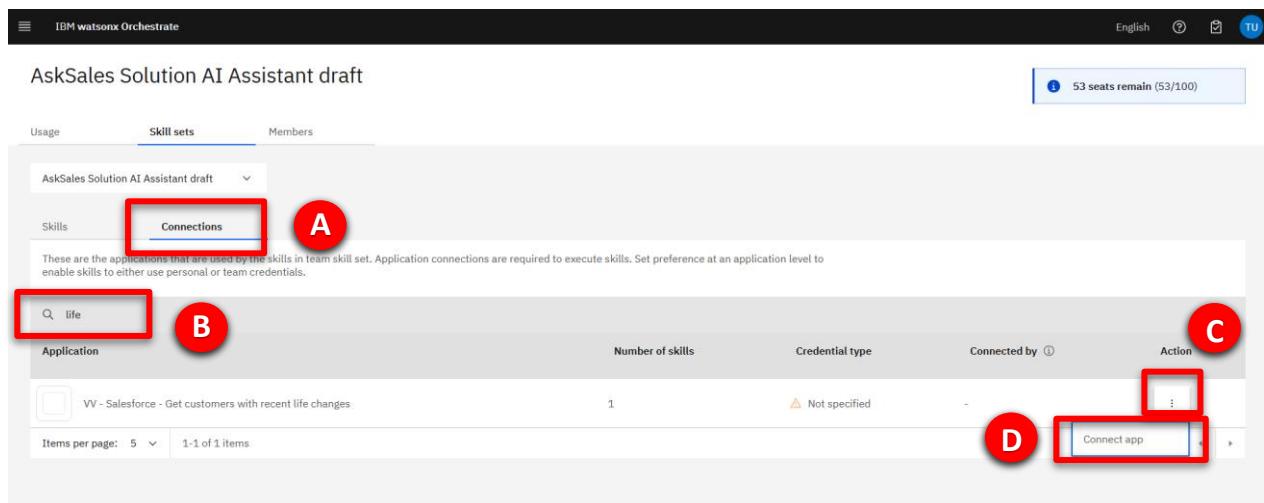
Connect app

- In the bearer token input field (A), type “12345” and click the **Connect app** button (B).

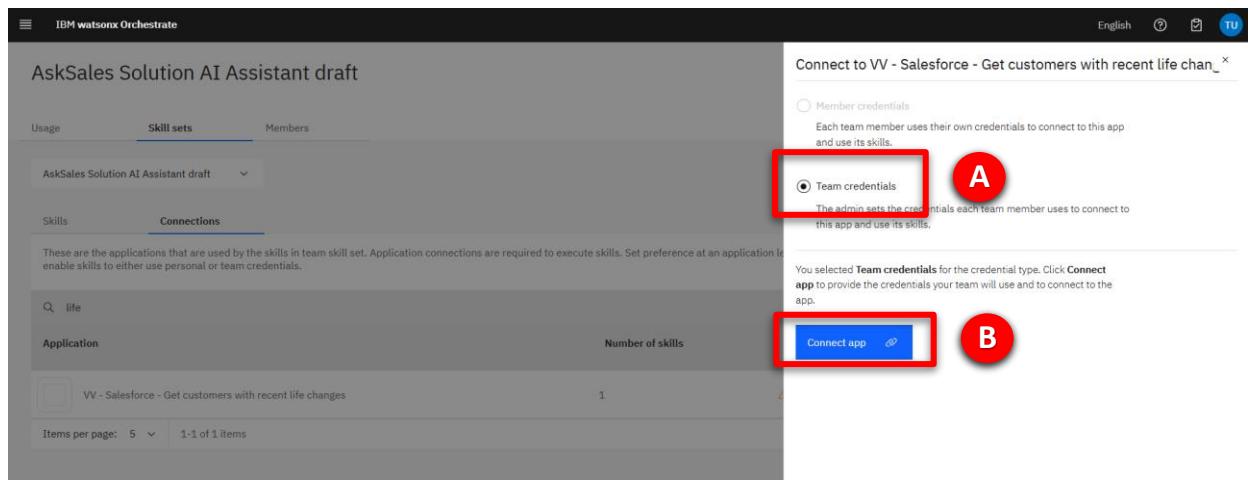


Next, you will configure the CRM (Salesforce) application that is being used in the AI assistant.

6. Select the **Connections** tab (**A**), type “life” in the search bar (**B**), and hit enter. Click on the action menu (**C**) next to the **Salesforce** application and click the **Connect app** button (**D**).

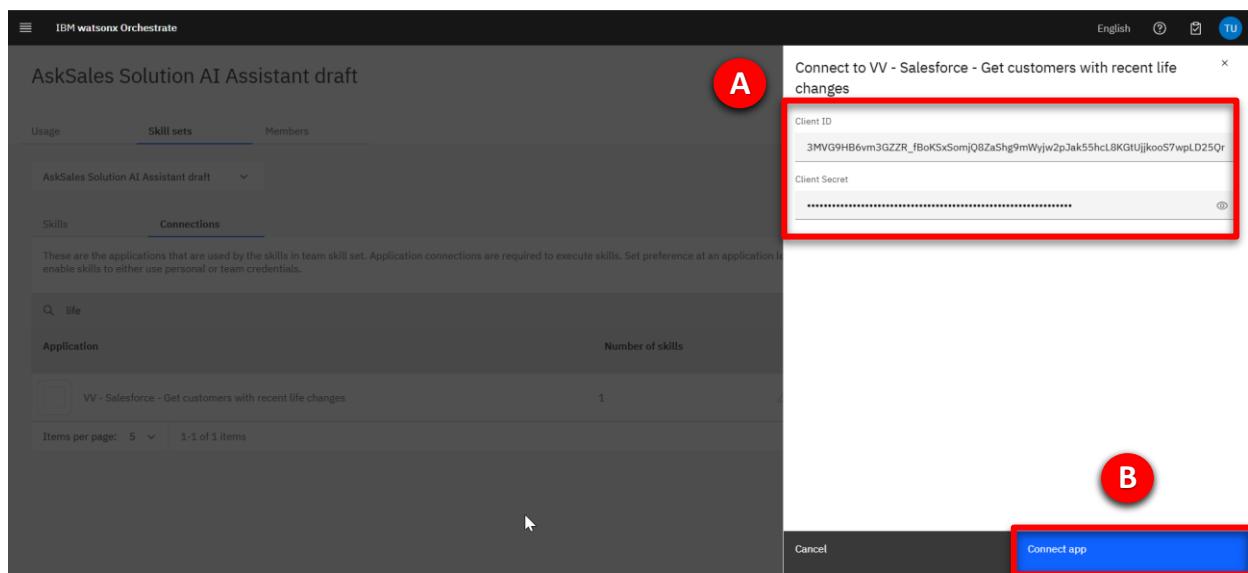


7. Select **Team credentials** (**A**) and click the **Connect app** button (**B**).



8. Enter the following credentials **(A)** to connect and the application by clicking the **Connect app** button **(B)**.

- **Client ID (1):** 3MVG9HB6vm3GZZR\_fBoKSxSomjQ8ZaShg9mWyjw2pJak55hcL8KGtUjjkooS7wpLD25QraIBxop4ThrTPK237
- **Client Secret (2):** 34CB8CCE1E4495C0CAE6A921A5FC7D17CC6CE614152175D20F5B00F8B250626C



Lastly, you will configure the email communication application that the AI assistant will use to communicate with the customer.

9. Select the **Connections** tab **(A)**, type “gmail” in the search bar **(B)**, and hit enter. Click on the action menu next to the **Gmail** application **(C)** and click the **Connect app** button **(D)**.

AskSales Solution AI Assistant live

English New chat experience ⓘ ⓘ ⓘ ⓘ RS

96 seats remain (96/100)

Usage Skill sets Members

AskSales Solution AI Assistant live

Skills Connections A

These are the applications that are used by the skills in team skill set. Application connections are required to execute skills. Set preference at an application level to enable skills to either use personal or team credentials.

Application	Number of skills	Credential type	Connected by ⓘ
Gmail	2	Not specified	<span>C</span>

Items per page: 5 1-1 of 1 items

⋮ D Connect app

10. Select the **Team credentials** and click the **Connect app** button (**B**). You recently authorized Gmail so you may be able to select IBMTechXChangeCanada@gmail.com account without providing a username and password.

AskSales Solution AI Assistant live

English New chat experience ⓘ ⓘ ⓘ ⓘ RS

Connect to Gmail

Member credentials

Each team member uses their own credentials to connect to this app and use its skills.

Team credentials A

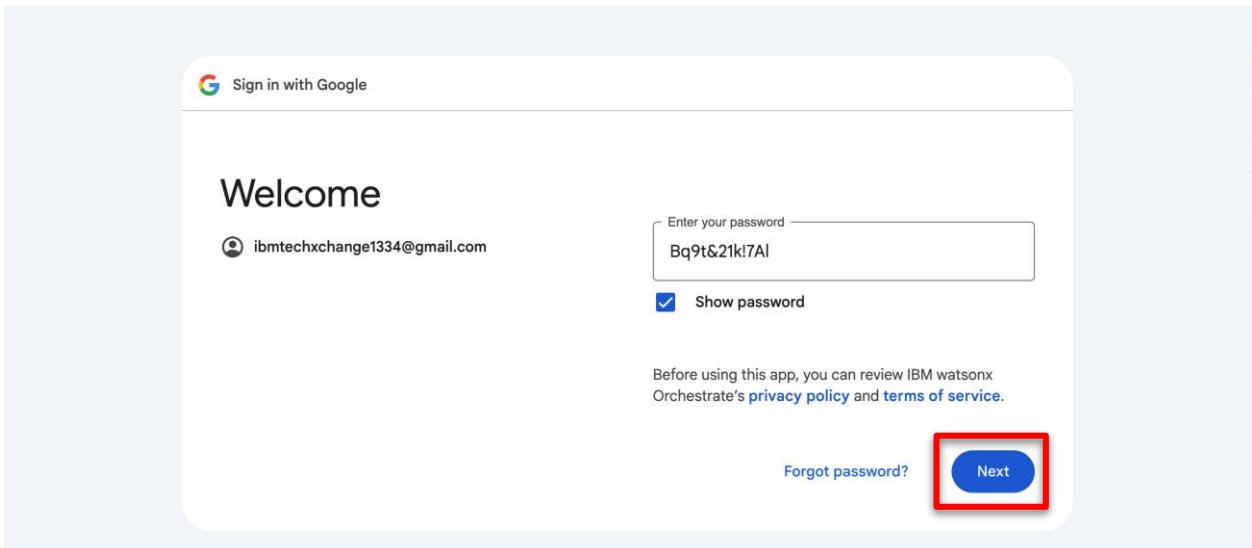
The admin sets the credentials each team member uses to connect to this app and use its skills.

You selected **Team credentials** for the credential type. Click **Connect app** to provide the credentials your team will use and to connect to the app.

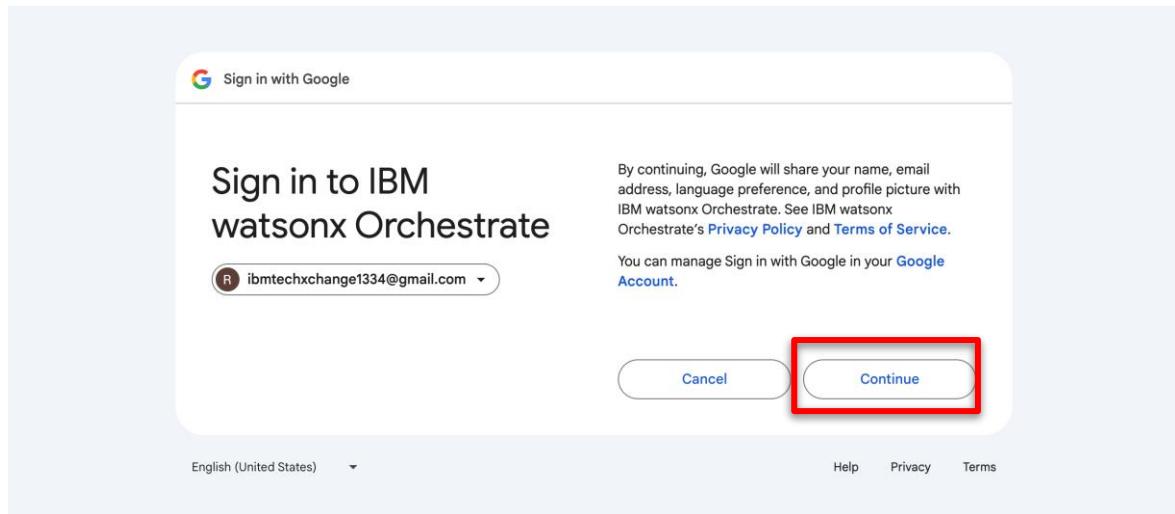
Connect app B

11. A new tab will open, and you will be prompted to enter a username. Enter IBMTechXChangeCanada@gmail.com and click **Next**.

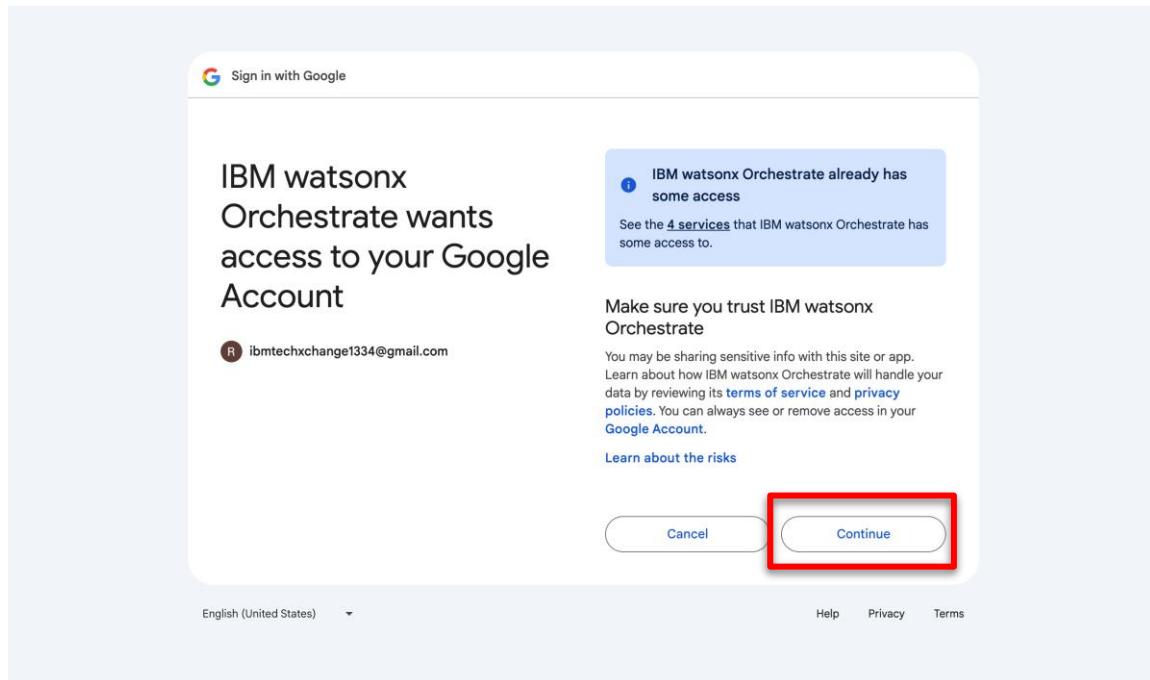
12. Next you will be prompted for a password. Enter “Bq9t&21k!7Al” and click **Next**.



13. Click the **Continue** button in the bottom right.



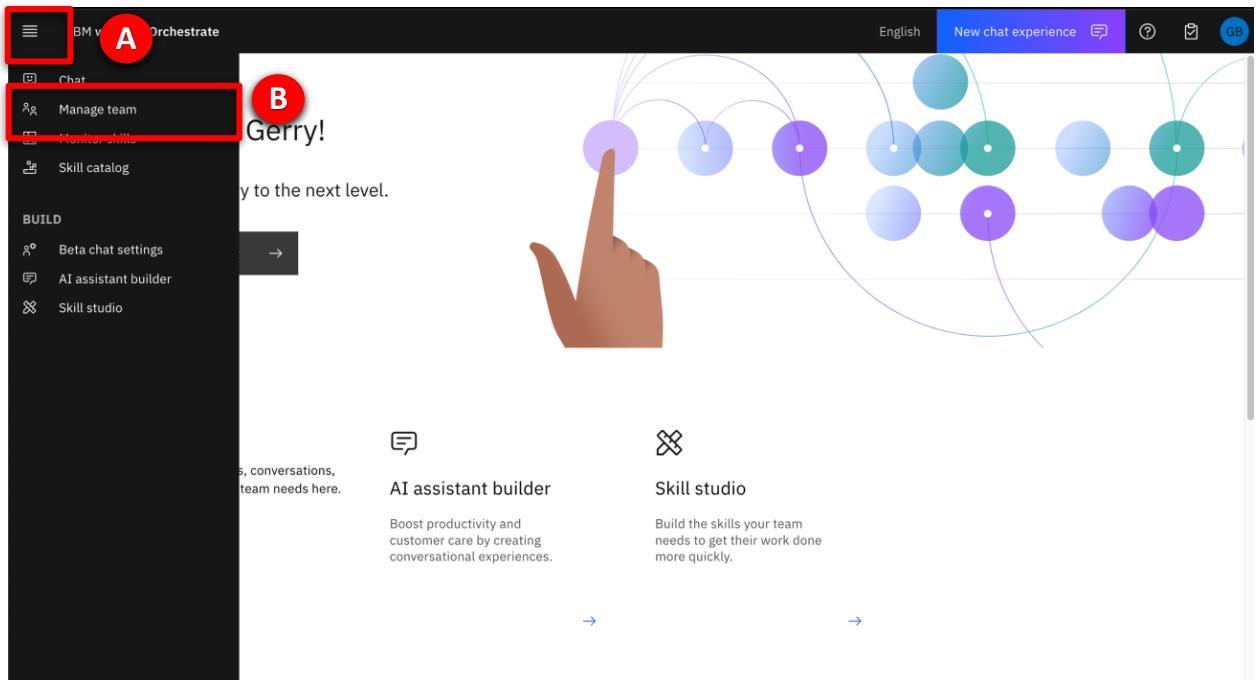
14. Click the **Continue** button in the bottom right.



## 5.3 Add skill credentials to the live version of your AI Assistant

Next, you will add the credentials to your live version of your AI assistant. These are the credentials that would be used for live deployment and for the agentic chat you will leverage at a later point in this lab.

1. Click the navigation hamburger menu **(A)** and select **Manage Team** **(B)**.



2. Select the **Skill sets** tab (**A**) and in the skill set drop down selection menu, select the **live** version of your newly created AI assistant (**B**). You previously completed these steps for your draft version. For example, someone named Rebecca Smith would select “Smith AI Assistant live.”

The screenshot shows the 'Skill sets' tab selected (A). A dropdown menu is open, showing three options: 'AskSales Solution AI Assistant live' (B), 'AskSales Solution AI Assistant draft', and 'Team skills'. The 'AskSales Solution AI Assistant live' option is highlighted with a red box and a checkmark.

3. Select the **Connections** tab (**A**), type “watsonx.ai” in the search bar (**B**), and hit enter. Click on the action menu (**C**) next to the **watsonx.ai (experimental)** application and click the **Connect app** button (**D**).

The screenshot shows the 'Connections' tab selected (A). A search bar contains the text 'watsonx' (B). Below the search bar, a table lists an application: 'watsonx.ai(experimental)' with 16 skills, 'Not specified' credential type, and 'Connected by' status. To the right of the table, there is a red box around the 'Connect app' button (D). An action menu icon (C) is also highlighted with a red box.

4. Select **Team credentials** (**A**) and click the **Connect app** button (**B**).

AskSales Solution AI Assistant live

Usage      Skill sets      Members

Skills      Connections

These are the applications that are used by the skills in team skill set. Application connection preference at an application level to enable skills to either use personal or team credentials.

Watsonx

Application	Number of skills
watsonx.ai(experimental)	16

Items per page: 5    1-1 of 1 items

Connect to watsonx.ai(experimental)

Member credentials  
Each team member uses their own credentials to connect to this app and use its skills.

Team credentials  
The admin sets the credentials each team member uses to connect to this app and use its skills.

Connect app

5. In the bearer token input field (**A**), type “12345” and click the **Connect app** button (**B**).

AskSales Solution AI Assistant live

Usage      Skill sets      Members

Skills      Connections

These are the applications that are used by the skills in team skill set. Application connection preference at an application level to enable skills to either use personal or team credentials.

Watsonx

Application	Number of skills
watsonx.ai(experimental)	16

Cancel      Connect app

Connect to watsonx.ai(experimental)

Bearer Token

12345

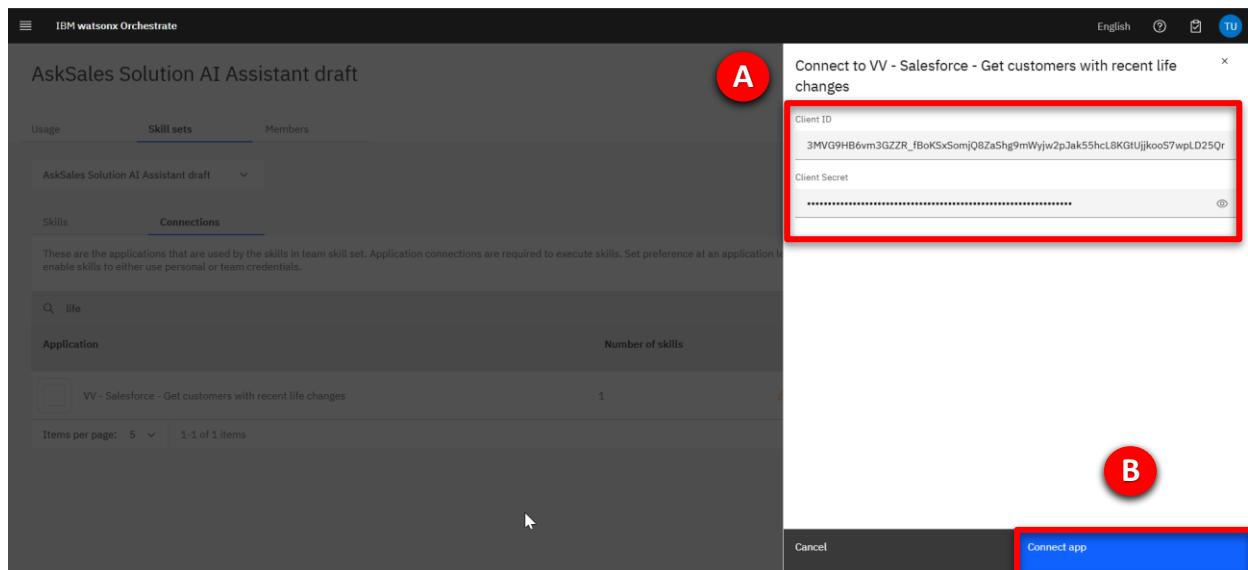
Next, you will configure the CRM (Salesforce) application that is being used in the AI assistant.

6. Select the **Connections** tab (**A**), type “life” in the search bar (**B**), and hit enter. Click on the action menu (**C**) next to the **Salesforce** application and click the **Connect app** button (**D**).

7. Select **Team credentials (A)** and click the **Connect app** button (B).

8. Enter the following credentials (A) to connect and the application by clicking the **Connect app** button (B).

- **Client ID (1):** 3MVG9HB6vm3GZZR\_fBoKSxSomjQ8ZaShg9mWyjw2pJak55hcL8KGtUjjkooS7wpLD25QraIBxop4ThrTPK237
- **Client Secret (2):** 34CB8CCE1E4495C0CAE6A921A5FC7D17CC6CE614152175D20F5B00F8B250626C



Lastly, you will configure the email communication application that the AI assistant will use to communicate with the customer.

- Select the **Connections** tab (**A**), type “gmail” in the search bar (**B**), and hit enter. Click on the action menu next to the **Gmail** application (**C**) and click the **Connect app** button (**D**).

- Select the **Team credentials** and click the **Connect app** button (**B**). You recently authorized Gmail so you may be able to select IBMTechXChangeCanada@gmail.com account without providing a username and password.

AskSales Solution AI Assistant live

Usage Skill sets Members

Skills Connections

These are the applications that are used by the skills in team skill set. Application connection preference at an application level to enable skills to either use personal or team credentials.

Application Number of skills Credential type

Gmail 2 Not specified

Connect to Gmail

Member credentials

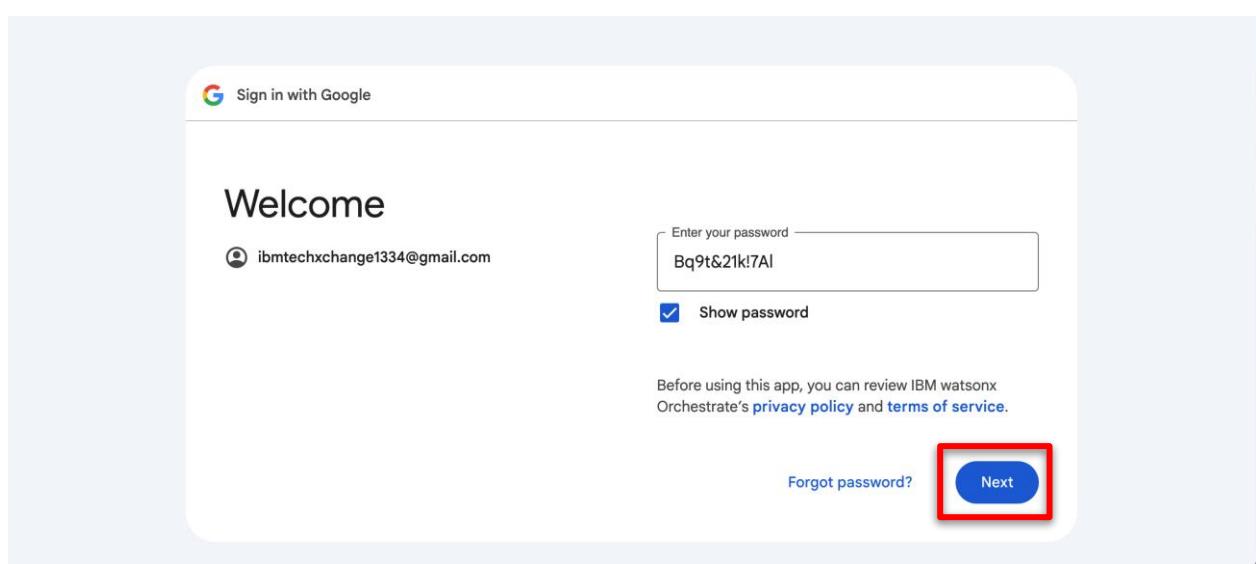
Team credentials

The admin sets the credentials each team member uses to connect to this app and use its skills.

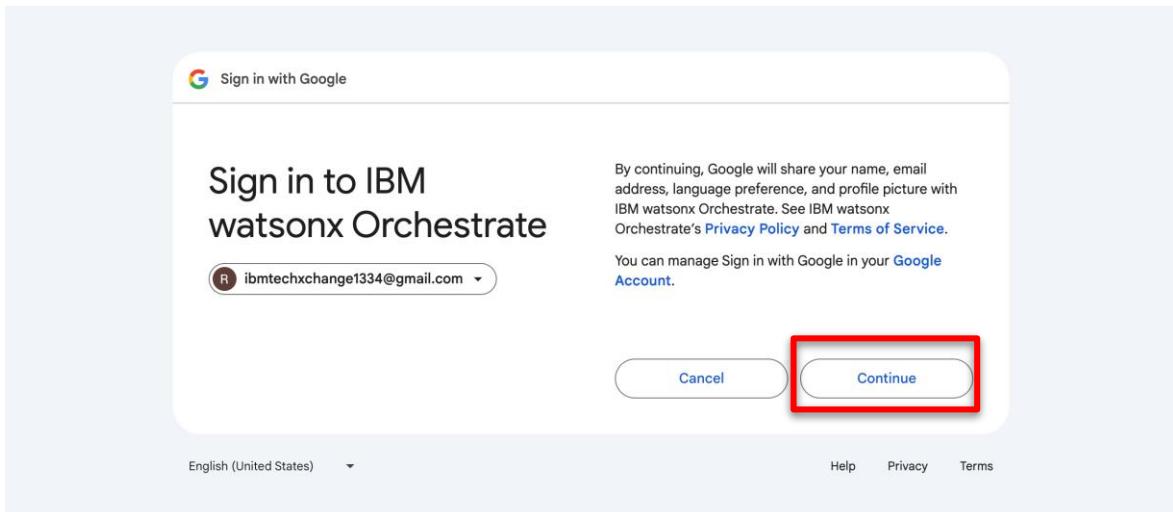
You selected **Team credentials** for the credential type. Click **Connect app** to provide the credentials your team will use and to connect to the app.

Connect app

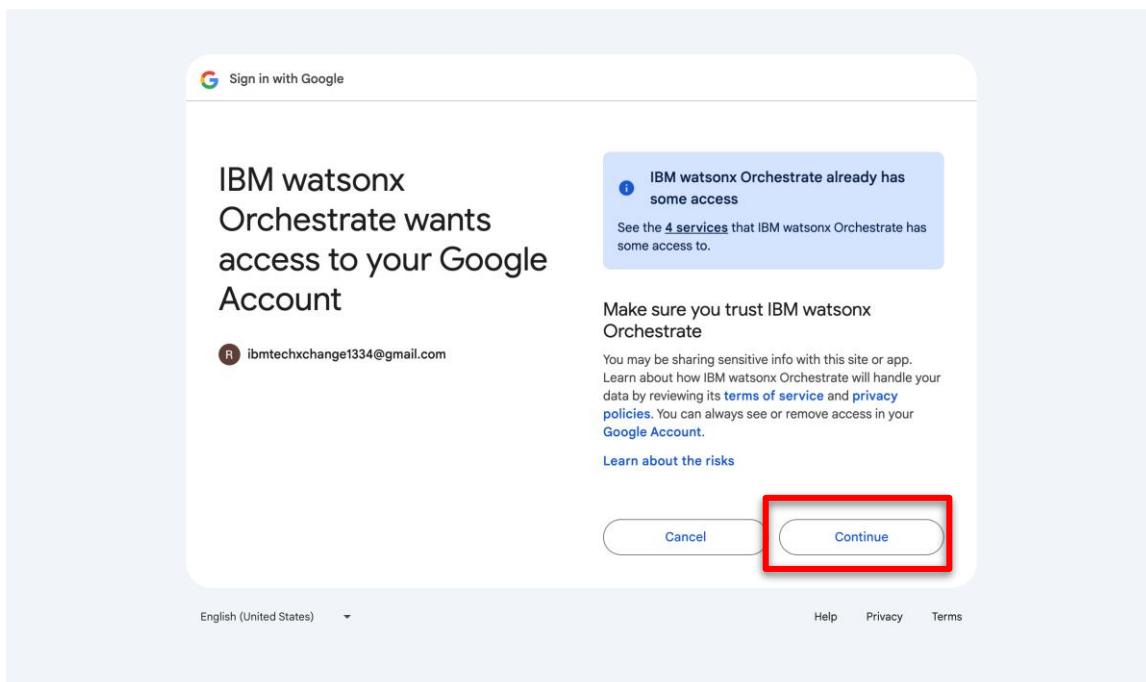
11. A new tab will open, and you will be prompted to enter a username. Enter `IBMTechXChangeCanada@gmail.com` and click **Next**.
12. Next you will be prompted for a password. Enter “`Bq9t&21k!7Al`” and click **Next**.



13. Click the **Continue** button in the bottom right.



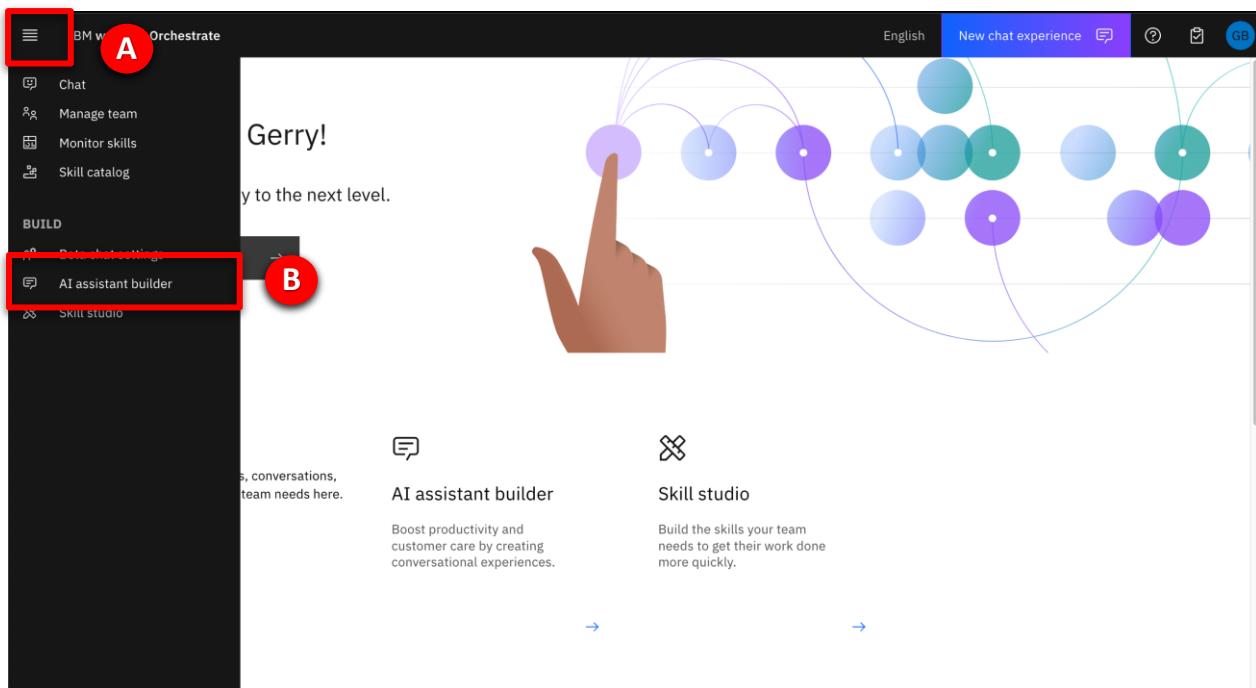
14. Click the **Continue** button in the bottom right.



## 5.4 Creating a skill-based action

Now that you have created your own AI assistant, you will now add the skill flow that you created earlier so that it is available for execution in your AI assistant.

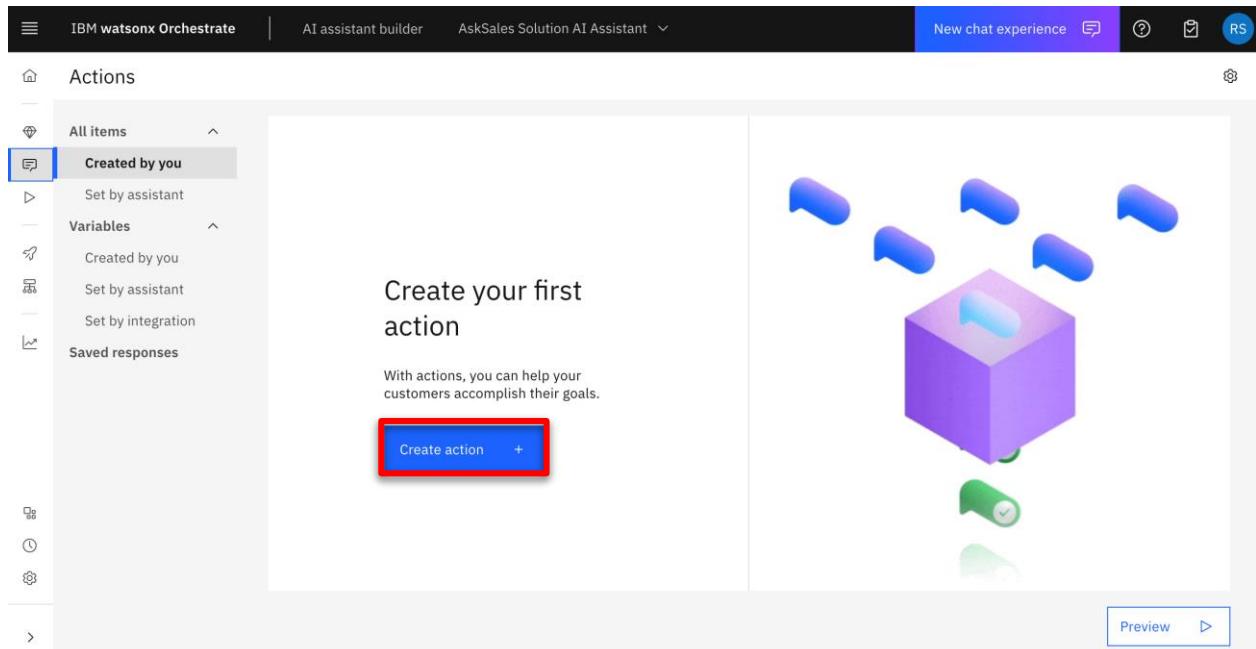
1. Click the navigation hamburger menu **(A)** and select **AI Assistant Builder (B)**.



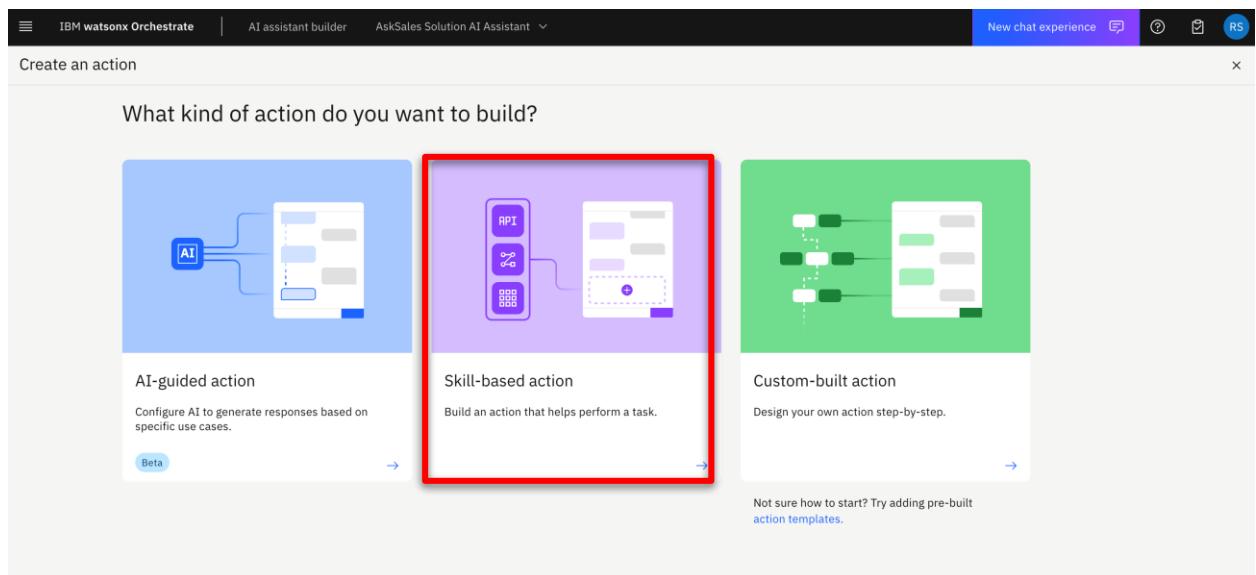
2. In the AI assistant dropdown, select the AI assistant you created in a previous step (A) and click the **Actions** menu (B) on the left-hand side. For example, someone named Rebecca Smith would select “Smith AI Assistant.”

The screenshot shows the AI assistant builder interface for the "AskSales Solution AI Assistant". The top navigation bar includes the IBM Watsonx Orchestrate logo, the AI assistant name, and various global navigation links like "New chat experience", "Skill studio", "What's new", and "Documentation". On the left, a sidebar lists "Generative AI", "Actions" (which is highlighted with a red box and a red circle labeled 'B'), "Preview", "Deploy", "Publish", "Environments", "Improve", and "Analyze". The main content area displays a banner for Generative AI and a section titled "Build actions" with sub-sections for "Customize your greeting", "Create a fallback plan", "Set up search", and "Explore the skill catalog".

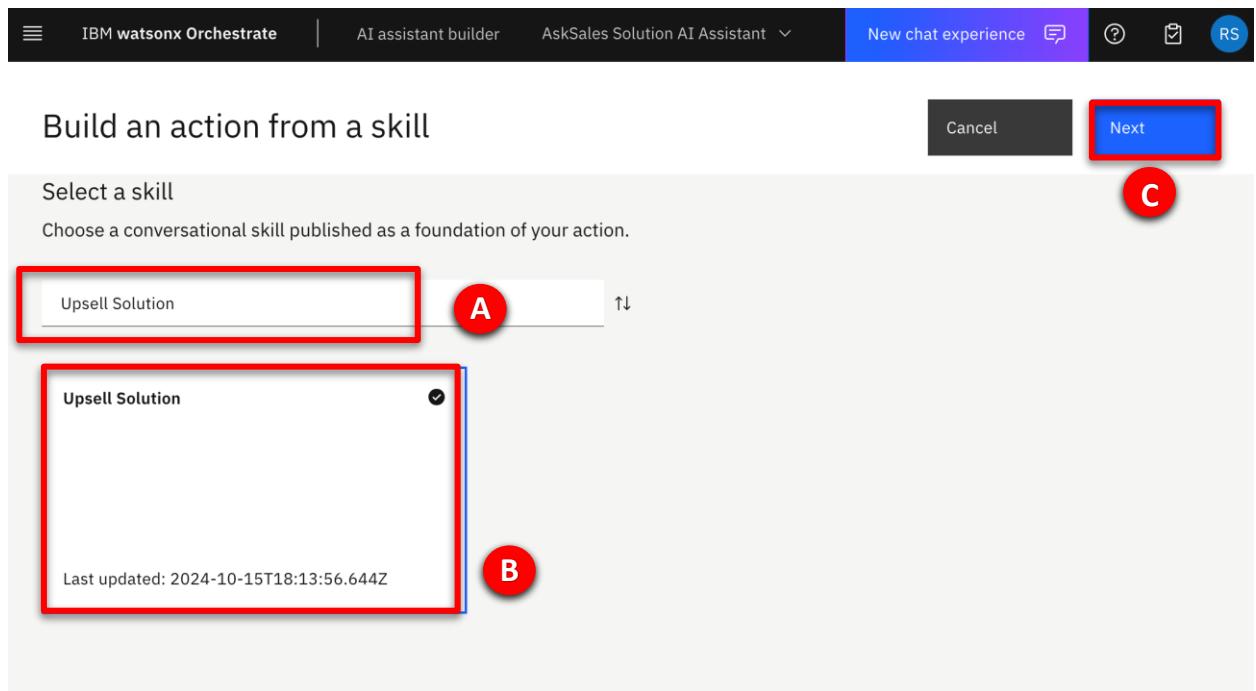
3. Click the **Create action +** button.



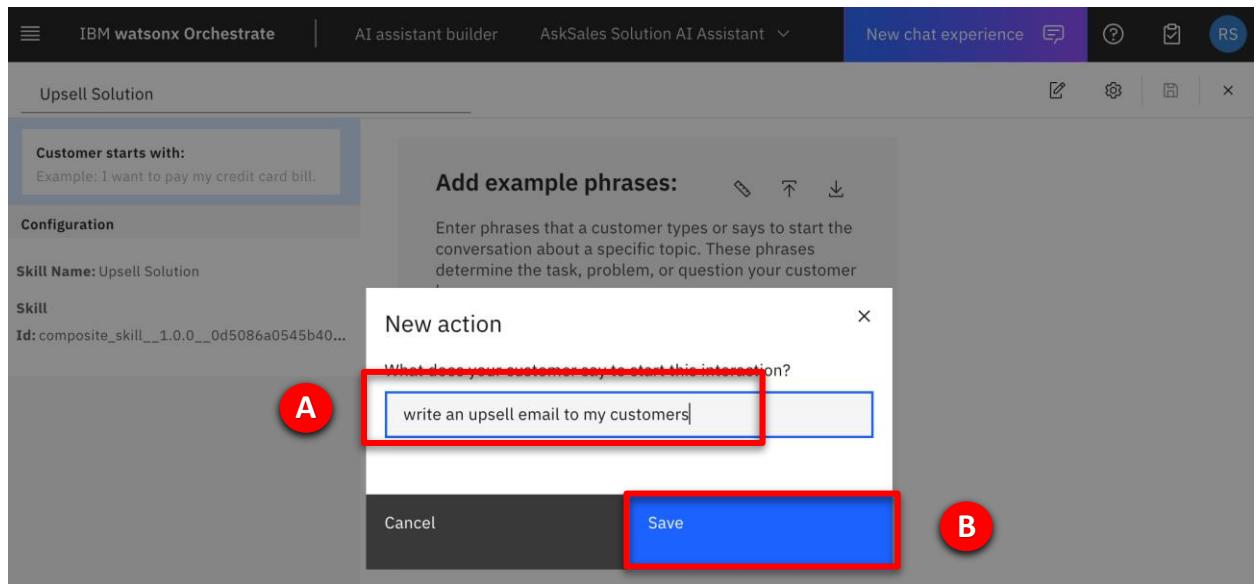
#### 4. Select the **Skill-based action** tile.



#### 5. In the search bar, type “Upsell [YOUR LAST NAME]” (A) and hit enter. Select your upsell skill flow (B) and click the **Next** button (C). For example, someone named Rebecca Smith would enter “Upsell Smith.” Note that it may take a few seconds for the skill list to load.



6. In the New action dialog box (**A**), type “write an upsell email to my customers” and click the **Save** button (**B**). This phrase will be used to initiate our skill flow.



7. In the top right corner, click the save icon (**A**). After saving is complete click the **X** icon (**B**) in the top right corner.

**Customer starts with:**  
write an upsell email to my customers

**Configuration**

**Skill Name:** Upsell Solution

**Id:** composite\_skill\_\_1.0.0\_\_0d5086a0545b40...

**Add example phrases:**

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 Total: 1 to start this action

Enter a phrase

write an upsell email to my customers

## 5.5 Publishing AI Assistant

Now that you have created your AI assistant, we must publish it so that we can use it in a live environment.

1. Click the **Publish** menu on the left-hand side.

**Home**

**Build**

- Generative AI
- Actions
- Preview
- Publish**
- Environments

**Improve**

- Analyze

**Integrations**

**Activity log**

**Assistant settings**

**Solution AI Assistant**

15, 2024 1:19:18 PM CDT

Watsonx Generative AI is GA!

Watsonx Generative AI is now available to the general public. Token usage based billing will begin on 1 July 2024, [Pricing](#) and [Learn more](#).

Watsonx Generative AI features! [Learn more](#) about intelligent information gathering. [Enable in settings](#)

**Build actions**  
Enhance and improve your assistant's actions.

**Customize your greeting**  
Welcome your users in a unique way that aligns with your brand.

**Create a fallback plan**  
Train your assistant to adapt to specific situations.

**Set up search**  
Determine how your assistant extracts answers for your user questions.

- Click the **Publish** button on the right-hand side.

The screenshot shows the 'Publish' screen in the IBM Watsonx Orchestrate interface. At the top, there's a navigation bar with 'IBM Watsonx Orchestrate', 'AI assistant builder', 'AskSales Solution AI Assistant', 'New chat experience', and various icons. Below the navigation is a sidebar with icons for home, environment, and other settings. The main area is titled 'Publish' and contains a section for 'Unpublished content'. It says 'Changes to content made in your draft environment are reflected here.' On the right, there's a 'Revert' button and a large blue 'Publish' button. Below this is a table titled 'Draft content' with columns for 'Change type', 'Content type', and 'Last modified'. The table lists three items: 'Upsell Solution' (Updated, Actions, a minute ago), 'Greet customer' (Updated, Actions, 8 minutes ago), and 'Fallback' (Updated, Actions, an hour ago).

- Select the **Live** in environment dropdown (A) and click the **Publish** button (B).

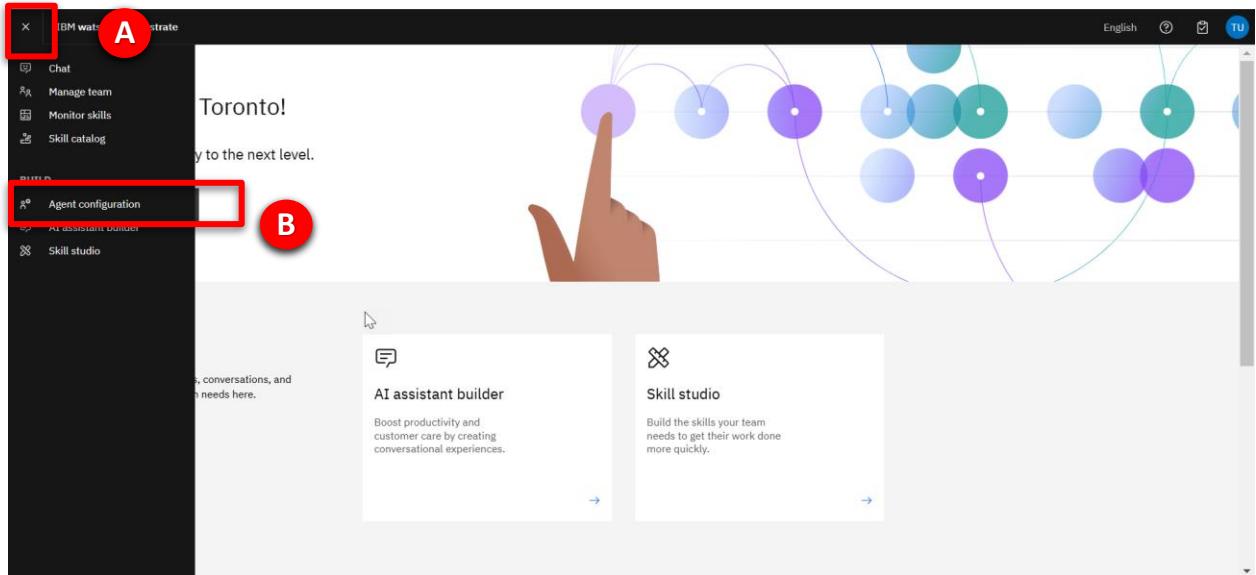
This screenshot shows the 'Publish' screen with a modal window for 'Publish all content'. The modal has a title 'Publish all content' and a message: 'Create a new version and publish it to an environment. This version replaces any content that is already in the environment.' It includes a text input field 'Describe changes in this version' (0/500) with placeholder text 'Example: Updated "Business hours" action'. Below this is a dropdown labeled 'Publish to an environment' with 'Live' selected. A note below the dropdown says: 'When you publish your content to the live environment, it replaces the currently live version and will be visible to your customers.' At the bottom of the modal are 'Cancel' and 'Publish' buttons, with the 'Publish' button highlighted by a red box. The background shows the same draft content table as the previous screenshot, with a red circle (A) pointing to the 'Live' dropdown in the table.

Publishing may take a few moments. Once complete you can now leverage your AI assistant from the agentic chat interface. Wait until publishing is complete before moving on to the next section.

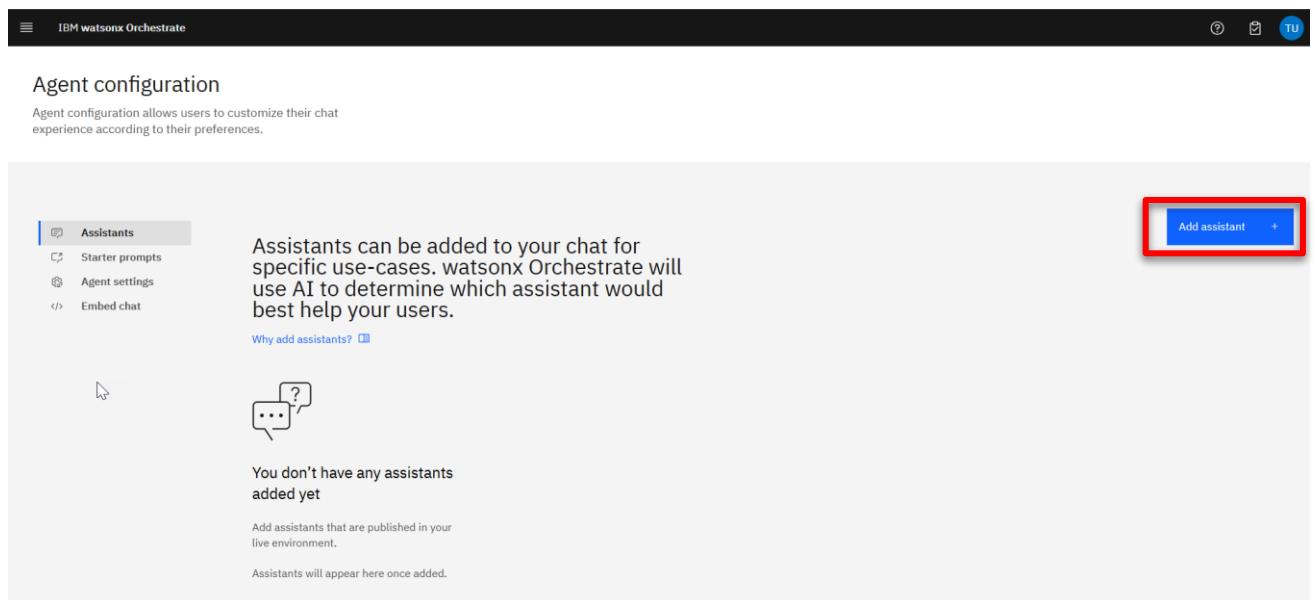
# 6 Using your AI Assistant

## 6.1 Add your AI Assistant to the agentic chat interface

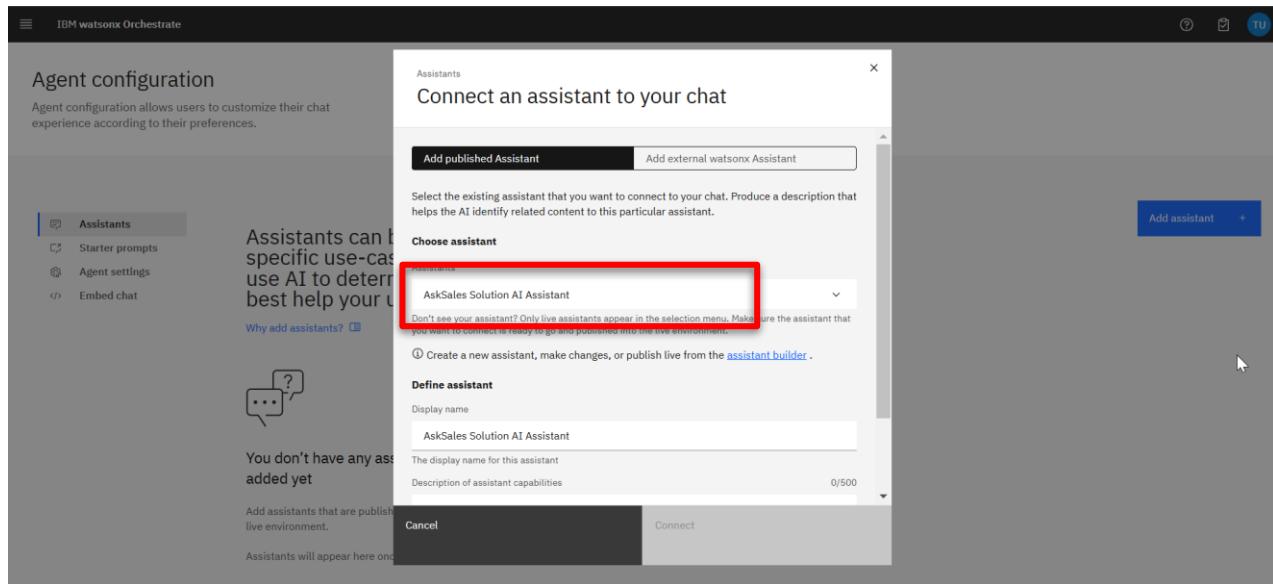
1. Click the navigation hamburger menu (**A**) and select **Agent configuration (B)**.



2. Click the **Add assistant** button on the right-hand side.

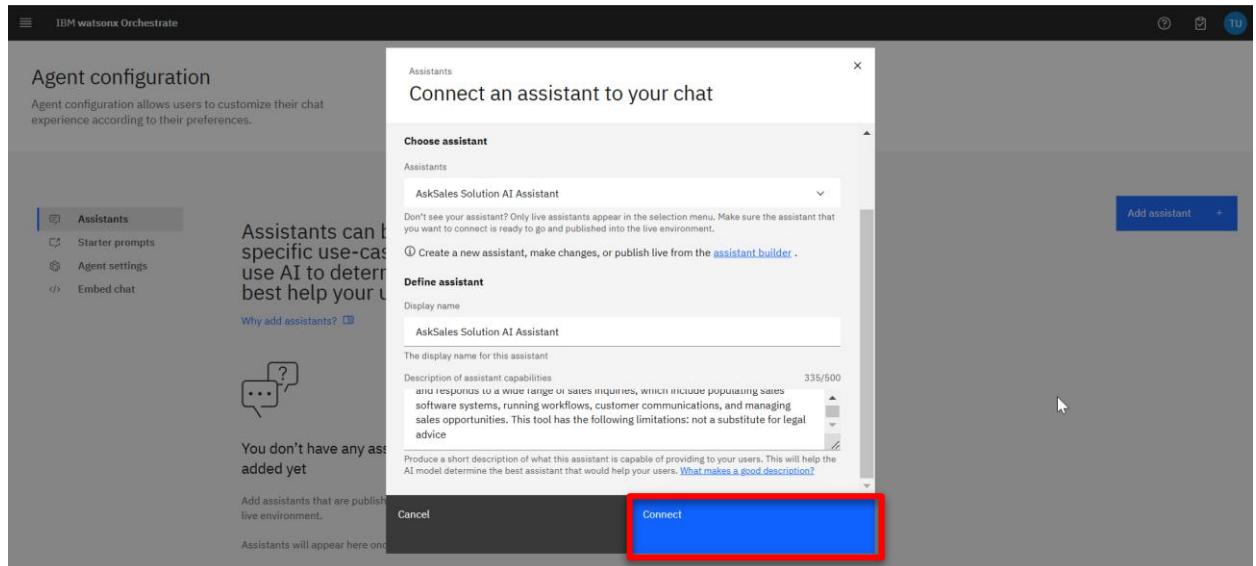


3. In the assistant dropdown menu (**A**), select the ai assistant that you created. For example, someone named Rebecca Smith would select “Smith AI assistant.”



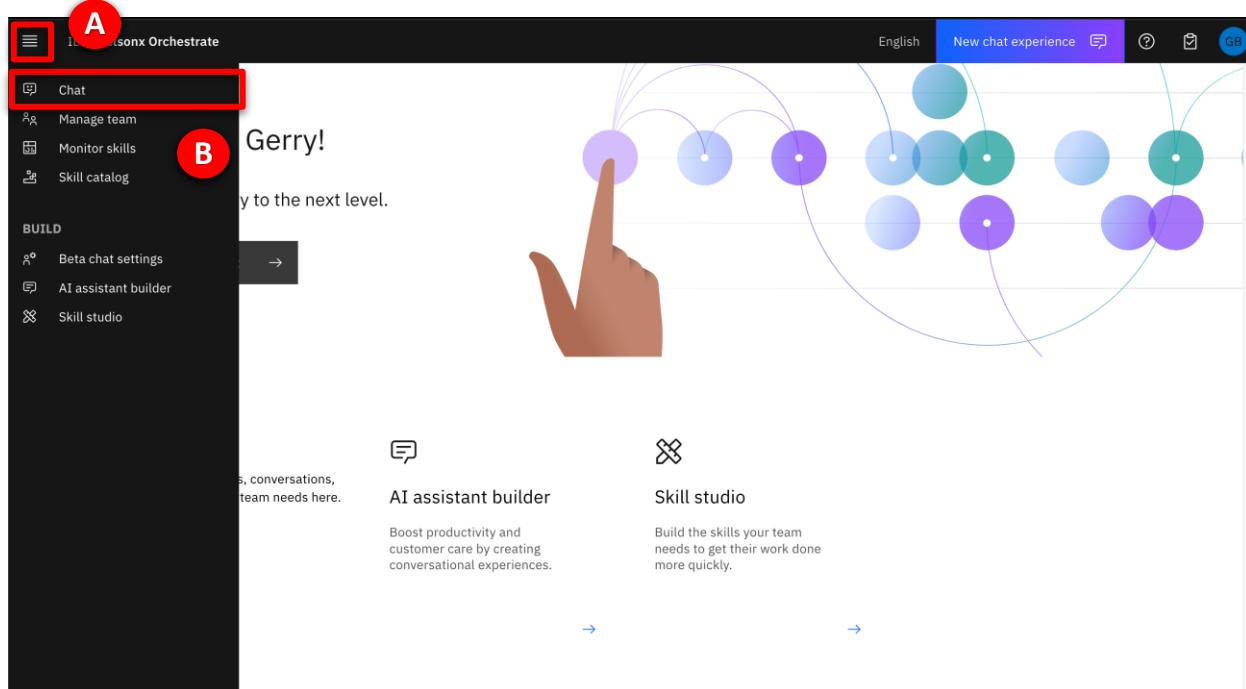
- After you select an AI assistant, you must provide a description of what it can do to help your users. In the description field, enter a description containing the most used keywords that enable the system to determine the best AI assistant that helps users.

For example, “Smith Solution AI assistant is a tool that simplifies sales tasks. It understands and responds to a wide range of sales inquiries, which include populating sales software systems, running workflows, customer communications, and managing sales opportunities. This tool has the following limitations: not a substitute for legal advice.”



## 6.2 Accessing your AI Assistant and running a skill flow

- Click the navigation hamburger menu (**A**) and select **Chat** (**B**).



2. In the chat bar, enter the following command targeting your specific AI assistant: "@[YOUR LAST NAME] AI Assistant write an upsell email to my customers." For example, someone named Rebecca Smith would say "Smith AI Assistant write an upsell email to my customers."

This screenshot shows the AI assistant builder interface. On the left, the navigation bar includes a 'New chat' button. The main area displays a welcome message: "Hello, welcome to watsonx Orchestrate." Below this are three cards with AI prompts: "Help me send an email", "Hello, How are you?", and "Good morning, What day is today?". At the bottom, a text input field contains the command "@AskSales Solution AI Assistant write an upsell email to my customers" with a blue 'Send' arrow icon to its right.

3. Select **John Collins** and click the **Apply** button.

List of Customers with Recent Life Changes

Customer Name	Email	Recent Change
Janet Thomas	janetthomas@gmail.com	Recently turned 64
John Collins	johncollins@xyzcompany.com	Child recently turned 25
Oliver Paul	oliverpaul@gmail.com	Purchased new vehicle
Mary Green	marygreen@abcinsurance.com	Recently moved to new home
Sam Anthony	samanthony@xyzcompany.com	Dental coverage upgraded

Items per page: 5 ▾ 1 – 5 of 5 items 1 ▾ of 1 ▶

**Cancel** **Apply**

- Click the **Apply** button.

Upsell Smith

Input instruction \*

You are an insurance salesman and you have a client named John Collins. Write a marketing email to the client. Do not include the subject in the response. The customer has a child that recently turned 25. In the USA, every young adult is required to purchase independent health by the age of 26. Recommend the silver plan as it is very cost effective. We will give a 15% discount as a loyalty bonus if the child takes out a policy with us.

**Cancel** **Apply**

- Before proceeding, you must enter the **Subject** of the email. Enter an appropriate email subject for an insurance customer outreach. A sample subject has been provided to you in the email body. You can use this suggestion or create your own. Optionally you can also update the email signature.

Subject  
**Important Update for John Collins and his 25-Year-Old Child**

A phrase that summarizes the email content

Content type  
text/plain

The content type of the email, such as text or HTML.

Content

Subject: Important Update for John Collins and his 25-Year-Old Child

Dear John Collins,

I hope this email finds you well. I am writing to inform you about a significant change in health insurance requirements for young adults in the United States. As you may be aware, every individual who turns 26 is required to have their own independent health insurance policy. This change takes effect on January 1st, 2023.

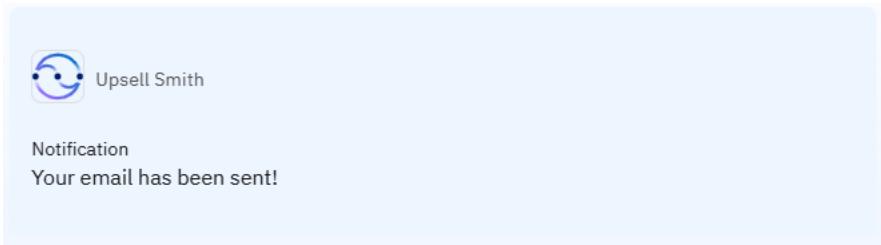
Your 25-year-old child, [Child's Full Name], is currently enrolled in your health insurance policy. However, since they will soon be turning 26, it is crucial that they have their own policy to avoid any disruptions in coverage.

To help you and your child navigate this transition, I would like to recommend the silver plan as a highly cost-effective option. This plan offers comprehensive coverage at a

The body content of the email

**Cancel** **Apply**

6. You will be notified that the email has been sent.



**This concludes the lab exercise, congratulations! We hope you enjoyed it and would love to hear your feedback and any questions you might have. Your instructors are happy to answer your questions and help you to get started with IBM Watsonx Orchestrate. Thank you!**