Extending business automation with RPA 300-level live demo script

Extending business automation with RPA 300-level live demo Demo script Automation Platinum Demos

Introduction

Today we will look at how we can extend business automation with Robotic Process Automation to easily provide customers with quotes for new insurance policies. We'll take advantage of the IBM Cloud Pak for Business Automation's capabilities to add robotic process automation (RPA) to a quoting process that is already automated with workflow.

Let's get started.

1 - Existing quoting process - without RPA

1.1 - Introduce the quoting process workflow without RPA

Narration

Future Corp is a traditional auto insurance provider that has a goal of improving customer experience by making it easier to provide new insurance policy quotes to its customers.

Let's look at how the company currently creates insurance quotes. In the existing process, every request for a new insurance policy must be routed to a policy specialist.

Action 1.1.1

• Show the process diagram for Future Corp's current quoting process (without RPA) in Process Designer, which you opened during the demo preparation.

Customer Semice	Start
Policy Agent	Propute and Send Quele Cudole Ecception? Esception
Policy Specialist	Calcele Cicception

Narration

We are looking at the process diagram for Future Corp's quoting process. Process diagrams are created in Process Designer. Process Designer is used to design and implement the quoting process. Within this low-code environment, the process diagram will control the execution of each new quote. The process diagram adheres to the Business Process Modeling Notation (BPMN). We use drag-and-drop to build the process diagram from the palette on the right. This allows us to model the process steps and flow. From there, you can drill down to complete the implementation and testing of the process application.

1.2 - Execute the quoting process workflow without RPA

Narration

The Process Portal is used by customer service agents to launch new quote requests and work on assigned tasks.

Action 1.2.1

• Go to the **Process Portal** tab, which you opened during the demo preparation. Log in as **customerService** (password is **password**).

Narration

The Process Portal is highly customizable to fit your organization's look and feel. The responsive user interface provides flexibility to get work done anywhere, at any time, on any device type, from a desktop device in the office to a mobile device at home or at a customer site. It can be tailored though a set of configuration options without having to customize the Process Portal application itself.

To request a quote, a customer service representative initiates a new quote request and enters the customer's policy data.

Action 1.2.2

• Under Launch, click New Insurance Quote to start a new quote.

Customer Service	≡	Work	4 Total Open a Construction
Dashboards Create Saved Search Work	Contact Customer - Issue Resolution:5766 Support Date: Cot 8, 2021, 7:31:02 PM	Issue # 5766	469
Processes Process Performance	Contact Customer - Issue Resolution:5767 Support Due: Oct 8, 2021, 7:31:06 PM	Issue # 5767	
Team Performance Show more(1)	Investigate Bill - Issu Issue Resolution:5768 Support Due: Oct 8, 2021, 7:33:32 PM	ue # 5768	
C. Launch ✓ New Insurance Quote	Investigate Bill - Issu Issue Resolution:5769 Support Due: Oct 8, 2021, 7:33:34 PM	ue # 5769	My Tasks
X New Insurance Quote RPA			
	< 1 > 25 v items	per page	1 - 4 of 4 items

Action 1.2.3

• Use the Get Test Data button to pre-fill in the form with some test data.

≡	Step: Collect Quote	e Information	:
Insurance Information			D
Lien Holder	Additional Insurance	Interested Party	
Bodily Injury Liability	Prope	rty Damage Liability	
Uninsured Motorist	Comp	rehensive	
Collision Waiver	Emer	gency Road Service	
Rental Reimbursement			
	⊖ Get Test Data	\ominus Get Quote	

Action 1.2.4

• **Optionally**, change the customer name and the make of the car to make this request unique.

≡	Step: Collect Quote Information	:
Applicant		•
First Name	Address	
John	10 Elm Street	
Last Name	Phone	
Smith	512-340-2012	
Date Of Birth	Email	
4/8/1985	jsmith@gmail.com	
Vehicle		0
Vehicle Make	Vehicle Year	
Toyota	2021	
Vehicle Model	Vehicle V I N	
Tundra	5TFUW5F14EX379984	

Action 1.2.5

• Click **Get Quote** to close the task and submit the new quote request.

	Step: Collect Quote Information	
Insurance Information		٥
Lien Holder	Additional Insurance	Interested Party
Bodily Injury Liability	Property Damage Liability	
Uninsured Motorist	Comprehensive	
Collision Walver	Emergency Road Service	
Rental Reimbursement		
	⊖ Get Test Data	Ə Get Quote

Narration

Policy specialists enter the customer data into the policy system and create the quote. They use the Process Portal to organize their tasks and work on the tasks assigned to them. Our specialist has received a new task to prepare the quote.

When the policy specialist receives the quote request, she needs to log into the quoting system to prepare a new quote, which involves manually entering a significant amount of information. This is both time consuming and error prone as the specialist must go field-by-field in order to move all the customer's data into the quoting system.

Behind the scenes, the quoting process is managed by workflow. Once the policy specialist completes this task, the system waits for the customer's response. If the customer accepts the quote, the policy specialist will again log into the quoting system to establish a new insurance policy for the customer.

Action 1.2.6

• (Still on the Process Portal) Log out (as **customerService**), and then log in as **policy1** (password is **password**).



Action 1.2.7

• Run the most recent **Prepare New Quote** task by clicking the task name.



Action 1.2.8

• Open the legacy quoting app by using the shortcut in the bottom right of the taskbar to click **FCQS_2021.jar**.



Action 1.2.9

• Log in to the quoting app (any username and password will work).

-		Focus Corp Quoting	System - FCQS V19.912	Ŀ	- 0	x
	Log in					
	User Name:		stu			
	Password:		••••			
		Login	1			
			-			

Action 1.2.10

• Show the task UI and the quoting app to make the point that the quote data must be manually entered into the quoting app.

		 Focus Corp Quoting 	p System - FCQS V21.10	
		Customer Information		
		Driver ID:	1	
💽 Process Portal - Prepare New Qu: X		First Name:		
← → C ① itembaw/9443/ProcessPortal/launchTaskCompletionTaskia	← → C 介 ● ibmbaw/9443/ProcessPortal/launchTaskCompletionTaskid=7004			
📑 RAW 📑 ODM 📑 RFA 📑 Datacap 📑 RAM 📑 RA.ML.Server 🧿 RAI Wo	rishop Mat	Birth Date:		
-		Address		
Prepare New Que	ote - Quote ID 58	Phone:		
		Line:		
Car Insurance Quote Application		Venue momadon		
		Value and Annual Va		
Application Notes		Vebicle Year:		
		VIR		
		Quote Details		
Applicant		Leinholder:	•	
		Additional Insured:		
First Name	Address	Interested Party:		
Bob	10 Elm Street	Bodily Injury Liability:		
Last Norre	Phone	Property Damage Liability:		
Smith	512-340-2012	Uninsured & Underinsured Notorists:		
		Comprehensive:		
Data of Dirth	ETHER.	Cellision		
04/08/1985	jsmith@gmail.com	Emergency Road Service:		
		Restal Reimbursement		
Insurance Information				
		Total Premium per 6 menths:		
		CREATE NEW QUOTE	ENT	

2 - Adding an RPA bot to the workflow

2.1 - Introduce the workflow process with RPA

Narration

Now let's look at how we can incorporate RPA to reduce that manual work. Here is a new version of the quoting workflow. The workflow is the same except we've modified the middle swim lane. Instead of assigning the tasks to a policy specialist, we route them directly to a bot for immediate execution. Just as with the original workflow, when there is a quoting exception, the quote request is routed to a policy specialist for resolution. For example, certain car models such as Audi and BMW require manual review to generate a quote.

Action 2.1.1

• Open the process diagram for the quoting process with RPA in Process Designer.



Action 2.1.2

• You will see the following process diagram.



2.2 - Bot authoring: Launch the quoting app

Narration

Using the Pak's RPA capabilities, Future Corp was able to easily build and deploy software robots, or bots, that automatically enter customer data into the quoting system. This enabled Future Corp to automate repetitive tasks such as creating customer quotes.

Action 2.2.1

• Go to **RPA Studio**, which you opened during preparation, with the **Get Quote.wal** file opened to the **GetQuote** routine.o to the **Workplace** window that you have already opened in your preparation.

Narration

Using the Pak's low code bot authoring environment, Future Corp easily built and tested their bots. Hundreds of pre-built commands are available to assemble bots using intuitive wizards.

Without RPA, policy specialists would had to manually copy and paste customer data into the quoting system. With RPA, Future Corp created a bot to connect to the quoting system, fill in the extracted information and email the quote to the customer once it is available.

Here we see some of the bot commands they used. First, the quoting application is opened. Next, the username and password are entered. Commands were used to open the quoting application, enter user name and password, and generate a new quote.

Now let's see how to build the quote bot from scratch. First, we'll use the Launch and Attach Window command to open the quoting application.

NOTE: The following build from scratch steps are simple, but intricate. Be sure to practice these steps so you can master your demo delivery.

Action 2.2.2

• To start creating a new bot, click **New** (1) (not the down arrow). Select **Wal File (2)**, and then click **Create** (3).



Action 2.2.3

• In the Toolbox search bar, type **attach** (1) and find the **Launch and Attach Window** (2) command. Drag it out to the script window. Set the executable parameter to the **FCQS_2021.jar** file (3) and click **Save** (4).



Narration

RPA Studio allows you to immediately run the bot commands. The debugging mode enables you to control the bot's operation, test commands, track variables, and debug scripts on remote computers.

Action 2.2.4

• In the toolbar ribbon, click **Start** to run the bot.



Action 2.2.5

• The Focus Corp Quoting System will appear.



2.3 - Bot authoring: Log in to the quoting app

Narration

The recorder assists in creating your script. With the recorder, you can select user interface components to enter commands in your script. Let's build the commands to log into the quoting application. First, we'll record the user name field.

Action 2.3.1

• In the toolbar ribbon, click **Start Recorder** to capture keystrokes from the quoting app.



Action 2.3.2

• Hold the **control** key and mouse over the **User Name** field (1) in the quoting app. Release the control key once the field highlights in red. Then, from the **Recording** menu, select **Actions**, **Set Value**, **By XPath** (2).



Action 2.3.3

• On the **Set Value** property page, click the **icon next to the Value** (1) to assign a variable. Then, click the **New Variable** icon (2) to create a new variable.



• Name the new variable vUsername (1). Give it a default value mary (2). Click Save twice (3).



Narration

Next, we'll record the password field. (In real life, we would use our Vault for entering encrypted credentials.)

Action 2.3.5

• Hold the left control key and mouse over the **Password** field (1) in the quoting app. Release the control key once the field highlights in red. Then, from the **Recording** menu, select **Actions**, **Set Value**, **By XPath** (2).

🗰 🗐 🐡 Recording Window	Verify Actions Image Grid			
TUTORIALS	Click Get Value Set Value	Auto Suggest		
TOOLS	Focus Focus Cick by OCR	By Id By Name By Id and name By Class name		
RUNTIMES	Control Screenshot	by Class and Value By Type and index By Name and value By Inser text and control type By XPath		
		By Type and name	2	x
EM IPA Studio			rocas corp carving system incus insure	
Postman		User Name: Password:	S(Alsemame)	
			Login	

Action 2.3.6

In the **Set Value** property page, click the **Select a variable icon** (1). Then, click the **Add a new variable** icon (2) to create a new variable.



• Name the new variable **vPassword** (1). Give it a default value of **123** (2). Click **Save** twice (3).

Define Variable Input Parameters	•		×
Name* 🚱	vPassword		
Variable type* 🔞	Text		•
Value 🕜	123		
Script Input Parameter 🔞			
Script Output Parameter 🔞		6	
		Cancel	Save

Action 2.3.8

• Hold the left control key and mouse over the **Login** button (1). Release the control key once the field highlights in red. Then, from the **Recording** menu, select **Actions**, **Click**, **By XPath** (2).



Action 2.3.9

• Click Save.



• In the toolbar ribbon, click **Stop Recorder**.



2.4 - Bot authoring: Verify the login commands

Narration

Let's use the Run command to playback the bot again and verify the commands. We will see the quoting app open, log in and move to the main screen.

Action 2.4.1

• Close the quoting app. In the menu ribbon, click Start.



Action 2.4.2

• The quoting app will open and automatically log in.

a	Focus Corp Quoting S	stem - FCQS V19.912	- • ×
Customer Information			
Driver ID:			
First Name:			
Last Name:			
Birth Date:			
Address:			
Phone:			
Email:			
Vehicle Information			
Vehicle Make:			
Vehicle Model:			
Vehicle Year:			
VIN:			
Quote Details			
Leinholder:			
Additional Insured:			
Interested Party:			
Bodily Injury Liability:			
Property Damage Liability:			
Uninsured & Underinsured Motori	sts:		1
Comprehensive:			
Collision:			
Emergency Road Service:			
Rental Reimbursement:			
Total Premium per 6 months:			
CREATE NEW C	QUOTE	EXIT	

2.5 - Bot authoring: Enter the quote data

Narration

Now let's continue to build some additional commands to enter data into the quoting bot.

Action 2.5.1

• In the menu ribbon, click **Start Recorder** to capture more keystrokes from the quoting app.



Action 2.5.2

• Hold the left control key and mouse over the **Driver ID** field (1) in the quoting app. Then, from the **Recording** menu, select **Actions**, **Set Value**, **By XPath** (2).

Recording Window Verify Actio	ns Image Grid						
Q.	Click •						
	Get Value 🕨						
3	Set Value 🔸	Auto S	iuggest				
E	Get Bounds	By Id					
<u>%</u>	Focus +	By Nat	me		Focus Corp Quoting System - FCQS V19.912	- 0	×
	Show or Hide Element By Id and name						
2 <u>5</u> 22	Click by OCR .	By Cla	ss name	uon			_
0	Get Control Text by OCR 🔹 🕨	By Cla	ss and value				
	Control Screenshot	By Typ	e and index				
		By Nar	meand value				_
		By Inn	er text and control type			_	_
		By XPa	ith				
		By Typ	e and name				
Phone:		Phone:					
			for the				
			Email:				
			Vehicle Informatio	n			
			Vehicle Make:				
			Vehicle Model				
							_
			Vehicle Year:				_
			VIN:				_
			Quote Details				

Action 2.5.3

• In the **Set Value** property page, click the **Select a variable** icon (1). Then, click the **Add a new Variable** icon (2) to create a new variable.



Action 2.5.4

• Name the new variable **vDriverID** (1). Give it a default value of **123** (2). Click **Save** twice (3).



Action 2.5.5

• Repeat for the rest of the text input fields (or stop there if you feel you've shown enough).

2.6 - Bot authoring: Finish up the bot

Narration

The bot will execute a final set of commands to generate the quote and then capture the quote amount, which is the output of this bot.

Action 2.6.1

• Hold the left control key and mouse over the **CREATE NEW QUOTE** button (1). Then, from the **Recording** menu, select **Actions**, **Click**, **By XPath** (2).



Action 2.6.2

• Finally, get the quote result. In the **Quote** app, hold the left control key and mouse over the **Total premium per 6 months** field (1). Release the control key once the field highlights in red. Then, from the **Recording** menu, select **Actions**, **Get Value**, **By XPath** (2).



Action 2.6.3

• In the **Set Value** property page, click **Select a variable** (1). Then, click the Add a new **variable** icon (2) to create a new variable.

 Focus Corp Quot 	ing System - FCQS V19.912	
Customer Information		
Driver ID:	123456789	
First Name:	Jukka	
Last Name:	Juselius	
Birth Date:	1971-03-26	
Address:	1830 ARTEIQUE RDTOPANGA, CA 90	0290
Phone Get Value		×
Email:	comment here	
Vehi Input Parameters		
Vehici Selector* XPath		
Vehici XPath* @ /root/root_pane[1]	layered_pane[1]/panel[1]/panel[1]/text[19]	
Vehicl		•
VIN:		
Quo Element in Table @		
Leinh		
Addite		
Intere Value		
Bodity Index 🕢		2
Prope Selected Values		VUOB Test references
Uninsi First Selected Value 🚱		vOriverID Zett - Latitescent
Comp	Cancel	Save VFirstName
Collision:	\$1000 DEDWAIVER	Text references
Emergency Road Service:	FULL / NON-DED	vLastName Text references
Rental Reimbursement:	\$35/DAY-\$ 1,050 MAX	vPassword
		vilsemame
Total Premium per 6 months:	\$799.27	Select
CREATE NEW QUOTE	EXIT	

Action 2.6.4

• Name the new variable **vQuoteValue** (1), and click **Save** (2) twice.

🔜 Get Value				×
		comment here		
Input Parameters				
Define Variable				х
Input Parameters	4			
Name* 🔞	vQuoteValue			
Variable type* 🔞	Text			•
Value 🕜				
1				
Script Input Parameter 😨				
Script Output Parameter				
			Canad 2	Saus
Calastad Values			Cancel	Jave
Selected values				-
First Selected Value 🕑				
,			Cancel	Save

Narration

Now we will add a command to log the quote value to the **Output** window.

Action 2.6.5

• In the toolbox, search for **log** (1). Drag the **Log Message** command to the bottom of the bot script (2).



Action 2.6.6

• Complete the log command by searching for and selecting the **vQuoteValue** variable (1). Click **Save** (2).

Open Description Descripion Description D	0	IEM Robotic Process Automation Studio		🕖 – 🗆 ×
Image: Section 1 Image: Section 1 <td>Home View Tools Help</td> <td></td> <td></td> <td></td>	Home View Tools Help			
Constant Service	New Ver variable (C C C C C C C C C C C C C C C C C C C	rance region 1 (1 k = k = 1 (1 k = k = 1 (1 k =	Variables Search Variables	÷ ₹×
Coput C	Beer Conversal Co	The first set (Selection field for a low complex per type) Selection (Selection field	Fact Videnss Interness Videnss Interness Videnss Videnss	
	One	Sort Cable Contention C	Select	Append
至 5	월 5			

Action 2.6.7

• Now let's do a last playback of the bot by clicking **Start**. The bot will create the quote, and the quote amount will appear in the **Output** window.



3 - Executing the workflow with RPA

3.1 - Execute the quoting process with RPA

Narration

Let's make a new request using the new RPA-enabled workflow. I'll log back in as the customer service representative and start a new quote. The RPA bot is set up to run on this same system. Now that I have submitted the new request, we will see the quoting app automatically launch and enter the quote request data into the quoting system.

Action 3.1.1

• Open the **Process Portal**, and log in as **customerService**.



Action 3.1.2

• Launch the New Insurance Quote RPA process.



Action 3.1.3

• Use the Get Test Data button to pre-fill the form with some test data.

≣	Step: Collect Quote	Information	:
nsurance Information			٥
Lien Holder	Additional Insurance	Interested Party	
Bodily Injury Liability	Property	Damage Liability	
Uninsured Motorist	Compre	tensive	
Collision Waiver	Emerge	ncy Road Service	
Rental Reimbursement			

Action 3.1.4

• **Optionally**, change the name and/or the make of the car to make this request unique.

	ct Quote Information	:
Applicant		
First Name	Address	
John	10 Eim Street	
Last Name	Phone	
Smith	512-340-2012	
Date Of Birth	Email	
4/8/1985	jsmith@gmail.com	
Vehicle		0
Vehicle Make	Vehicle Year	
Toyota	2021	
Vehicle Model	Vehicle V I N	
Tundra	5TFUW5F14EX379984	

Action 3.1.5

• Click **Get Quote** to close the task and submit the new quote request.

	Step: Collect C	uote Information	1
Insurance Information			D
Lien Holder	Additional Insurance	Interested Party	
Bodily Injury Liability		Property Damage Liability	
Uninsured Motorist		Comprehensive	
Collision Weiver		Emergency Road Service	_
Rental Reimbursement			
	⊖ Get Test Data	i \varTheta Get Quote	

NOTE: In a few seconds, see the quoting app launch automatically and complete the quote.

Action 3.1.6

• Click the flashing **quoting app** icon in the toolbar.



• The bot will automatically enter the quote data.



4 - Adding RPA chatbots to further extend the automation

4.1 - Review the chatbot script

Narration

Next, let's look at the bot script for the Customer Agent chatbot. Just like the bots we've just built, Future Corp's chatbot is assembled by dragging and dropping commands and configuring them using pop-up property sheets. Since chatbot capabilities are fully integrated, Future Corp was able to build their bots and chatbots using one single tool. Chatbot commands can be inserted anywhere inside the bot script. For example, the Bot Ask and Answer command asks the user a question in a chat and recognizes the answer using a knowledge base prepared for the chat subject. The Bot Ask Email command asks for and acknowledges a user-entered email.

Action 4.1.1

• Open the RPA window, click on the **Ingrid Insurance.wal** tab, and search for the chatbot commands by typing **bot** into the toolbox search.



Narration

The Bot Ask and Answer command is used to have the bot ask the customer a question in a chat. The answer is recognized using a knowledge base prepared for the chat subject.

Action 4.1.2

• Open the Bot Ask and Answer command in the bot script.



• Show how the command is connected to a knowledge base.



4.2 - Train a knowledge base

Narration

Bot Studio includes the machine learning model builder used by Future Corp for creating and training the knowledge base. Future Corp's RPA team found training the knowledge base to be very simple.

Action 4.2.1

• If the **Knowledge Bases** tab is not visible, click the **Tools** tab (1) on the menu ribbon, then click **Knowledge Base Training** (2).



Action 4.2.2

• Next, open the knowledge base definition. In the **Knowledge Bases** tab (1), click **IngridKB**, and then click **Version 1** (2).

Knowledge Bases 🕴 🕴 🗙	Insurance Ingri	iid.wal* × GetQuoteFCQS_DEMO.wal ×
Knowledge Base Name 2	main	
AlFastStart	56 🔊 Eve	Run Subroutine ecutes the routine InitializeChotbot
 AutomationChalleng 	57 🚉 (Cor	Connect to Chatbot or IVR nnect Chat, using \${language}
 chatbotIntegrationKB 	58	🗮 Bot Says
CommissionQuestDe	59	Says the text Hello! My name is Ingrid. I'm here to help you with insurance related topics. using the language S(language)
ElektraKB	60	While S(vContext) is not Equal to finish, do
FMortgagageKB		Ask How can I help you?, assigning Context to \$(vContext) and Answer to \$(vAnswer)
IBMChatbotSample	61	If If S(vContext) is Equal to policy_request, then
IBMRPAKB	62	Bot Says Says the text S(vAnswer)
IBMRPAQABase	63	ों। [:] Bot Ask Carousel Ask What type of insurance you are interested in? using the language \$(language), With collection of card Scienterstofficiant and Sciences to Science!!
Version 1 13 days ago	64	appendixed pund y and success to appendix Run Subroutine If Executes the routine Carinarance (§ SpelectedOption) is Equal to Car
IOeventBOTcommon	65	* Else If
IOeventBOTcommore	66	Bot Says
Toolbox Knowledge Bases	Script	Call Graph

Narration

The knowledge base has been trained to respond accurately to variety of questions. To the right, the related questions window shows a list of similar questions which would result in a similar answer. To the left, the score for the currently selected answer is displayed. The knowledge base user can also search the knowledge base for another answer, edit the current answer, or add a new answer.

• The Knowledge Base Training tool opens. Type the following: I have a policy issue with my current provider. Press enter.

iowledge Bases	Ϋ×	Insurance Ingrid.wal* × (SetQuoteFCQS_DE	MO.wal × IngridKB - v1 ×		
owledge Base Name	С				Export Knowledge Base	Options:
AlFastStart	Î	Selected Answer:		Minimum Score: 650 \$		
AutomationChalleng		Score: Tags:				
chatbotIntegrationKB		Context:				
CommissionQuestDe		Search other answer	୍ ନ୍ତ			
ElektraKB						
FMortgagageKB						
IBMChatbotSample						
IBMRPAKB	Ľ					
IBMRPAQABase						
IngridKB						
Version 1 13 days ago						
IOeventBOTcommon						
IOeventBOTcommon				i have a policy issue with my current provi	den	
IT KBv1	÷	Trainer Terms Synor	yms Change	25		

Action 4.2.4

• The maximum score is 1000. Note the low score displayed here, indicated with the red font (1). Type the following: **I have a problem with my policy. I want a new one.** (2). Press **enter**.

			Export Knowledge Base Opti	ons:
Selected Answer:		Minimum Score: 650 🗘		
Score: 115.912191569805	1			
Tags: +policy_request	-			
Context: policy_request				
Other Answer:				
Search other answer	୍ ନ୍ତ			
Of course! Let's start.				
	edit select			
Of course! Let's start.				
	edit select			
Understood.			<u> </u>	lser:
	edit select		I have a policy issue with my current provide	er
ок.		Bot:		
	edit select	Of course! Let's start.		
Add New Answer:	2			_
Add New Answer	+	i have a problem with my current polic	y. i want a new one.	
Trainer Terms Syn	onyms Change	25		

Action 4.2.5

• Again, this has resulted in a low score (1). In the **Of course! Let's start.** box, Click **select** to train the knowledge base.



• Since we have trained the knowledge base, the score now goes to a perfect 1000 (1). Click **Retrain** (2) to update the knowledge base.



Action 4.2.7

• Now enter the first interaction again. Type the following: I have a policy issue with my current provider. I need a new one.

					Export Knowledge Base	Options:
Selected Answer:		Minimum Score:	650 🗘			
Score: 1000						
Tags: +policy_request						
Context: policy_request						
Other Answer:						
Search other answer	୍ ନ୍ତ					
Of coursel Lot's start						User:
Of Course, Let's start.	edit select			i have a poli	cy issue with my current p	orovider
Of an and that is about		Bot:				
Of course: Let's start.	edit select	Of course! Let	's start. 🔺			
Understood.				-		User
	edit select		i have a prol	blem with my	current policy. i want a n	ew one.
OK.		Bot				
	edit select	Of course! Let	's start.			
Add New Answer:				_		
Add New Answer	+	i have a policy issue	with my current p	rovider.		
Trainer Terms Sync	onyms Change	s				

Action 4.2.8

• Press enter and see how the score improved with these updates to the knowledge base.



- Click the X on the IngridKB tab (1). Then click Yes (2) in the pop-up box that appears.
- NOTE: Whenever you close the knowledge base, DO NOT SAVE so this example works the next time you give a demo.



4.3 - Run the chatbot

Narration

Now let's see how we have enhanced the customer's interaction with the quoting process. As an alternative to the web form that collects the customer's quoting data, Future Corp's intelligent RPA chatbot provides an interactive virtual agent.

The chatbot can understand and respond to customer inquiries. For example, a chatbot recognizes that phrases like "I would like to switch my insurance policy" and "I need insurance" both lead to initiating the quoting process.

Action 4.3.1

• Select the Insurance Ingrid script (1), and click Start (2).



Action 4.3.2

- After the chatbot launches, resize the chatbot by mousing over the bottom right corner and dragging the corner of the chatbot window to make it larger.
- Otherwise, the insurance options will not display well.



• Type the following: I need insurance.

Please wait while loading. Protocol 1JFFpOeyR5Ev2liX1W8C-d Node DEBUG W06 Automaton Hellol My mane is Ingrid. I'm here to help you with insurance related topics. W06 Automaton How can i help you? W06 Automaton at 6453 PM	ihat	
Please wait while loading. Protocol 1JFFpOeyRSEv2IXIW8C-d Node DEBUG W06 Adomaton Hellol My name is logrid. I'm here to help you with insurance related topics. W06 Adomaton How can i help you? W06 Adomaton st 84:035 PM		~
Please wait while loading. Protocol 1JFFpDcyRSEv2IX1W8C-d Node DEBUG WCR Advantor Hellol My name is Ingrid. I'm here to help you with insurance related topics; WCR Advantor How can I help you? WCR Advantor at 6x32 FM		
Please wait while loading. Protocol 1JFFpDeyRSEv2IIX1W8C-d Node DEBUG . Work Advantation Heliol My name is Ingrid. I'm here to help you with insurance related topics. Work Advantation How can I help you? Work Advantation at 8433 PM		
Please wait while loading. Protocol 1JFFpOeyRSEv2IIX1W8C-d Node DEBUG . WG Automation Hellol My name is Ingrid. I'm here to help you with insurance related topics. HOW can I help you? HOW can I help you? MOR Automation at 6833 PM		
Please wait while loading. Protocol 1JFFpDeyRSEv2IIX1W8C-d Node DEBUG. WG6 Automation HeldIol My name is ingrid. I'm here to help you with insurance related topics. WG6 Automation How can I help you? WG6 Automation at 6433 PM		
Please wait while loading. Protocol 1JFFpDeyRSEv2IX1W8C-d Node DEBUG . WCX.Advanstor Hellol My mane is Ingrid. I'm here to help you with insurance related topics. WCX.Advanstor How can I help you? MCX.Advanstor II 6433 PM		
Please wait while loading. Protocol 1JFFpOeyRSEv2IIX1W8C-d Node DEBUG. WOR Advention: Heliol My name is Ingrid. I'm here to help you with insurance related topics. Work Advention: How can I help you? WORK Advention: at 8433 PM		
Please wait while loading. Protocol 1JFFpDeyRSEv2IX1W8C-d Node DEBUG. WIG Automation Hellol My name is Ingrid. I'm here to help you with insurance related topics. WIG Automation How can I help you? WIG Automation		
Please wait while loading. Protocol 1JFFpOeyRSEv2IIXIW8C-d Node DEBUG. WG6 Automation Hellol My name is ingrid. I'm here to help you with insurance related topics. WG6 Automation How can i help you? WG6 Automation		
VICE Alemation Hello My name is Ingrid. I'm here to help you with insurance related topics. Wice Alemation How can I help you? VICE Alemation at 6433 PM		
Hellol My name is Ingrid. I'm here to help you with insurance related topics. WCR Automation How calculation How calculation How calculation at 64:03:0 FM	Please wait while loading. Protocol 1JFFpOeyRSEv2IIX1W8C-d Node DEBUG.	
VICE Automation How can I help you? VICE Automation at 64035 PM	Please wait while loading. Protocol 1JFFpOeyR5Ev2IX1W8C-d Node DEBUG. W06 Automation	
How can I help you? WCA Advantation at 6433 PM	Please wait while loading. Protocol 1JFFpOeyRSEv2iX1W8C-d Node DEBUG WC6 Advantation Heliol My name is Ingrid. I'm here to help you with insurance related topics.	
WDG Automation at 64535 PM	Please wait while loading. Protocol 1JFFpOeyRSEv2lX1W8C-d Node DEBUG . W06 Advantation Hellol My name is Ingrid. I'm here to help you with insurance related topics. W06 Advantation	
	Please wait while loading. Protocol 1JFFpOeyR5Ev2IX1W8C-d Node DEBUG . WIG Automation Heliol My name Here is Ingrid. I'm here to help you with insurance related topics. WIG Automation How can I help you?	
	Please wait while loading, Protocol 1JFFpOeyR5Ev2IX1W8C-d Node DEBUG W05 Automation Helici My name is Ingrid. I'm here to help you with insurance related topics. W05 Automation How can I help you? W05 Automation #15435 PM	

Narration

The chatbot engages the customer to collect all the information needed to provide a quote.

Action 4.3.4

• Select the **Car** insurance.



Action 4.3.5

• Enter Lexus, RX350, 2021.



• Enter the vehicle identification number (VIN), which typically consists of 12 characters (for example, enter **123456789012**).



Action 4.3.7

• Enter the following: My email is mary@email.com.



Action 4.3.8

• Enter the following: Mary, Johnson.



• Enter an address such as **1 Main Street, Austin, TX 78730**.

WDG Automation	
	Lexus,RX350,2021
	Studio
And then type in the VIN of your car, thank you.	
WDG Automation	
	123456789012
	Studio
OK. Next I need to gather some base information about you.	
WDG Automation	
First, what's your email address	
WDG Automation	
	mary@email.com
	Studio
What is your full name? Please use first name, last name.	
WDG Automation	
	Mary, Johnson
	Studio
And your address? For example: 1830 Arteique Road, Chicago IL, 60176	
WDG Automation at 10:16:10 PM	
at 1 Main St Austin TV 79730	v 🛌
T Main St, Adson, 1X 70150	~ ~

Action 4.3.10

• Enter **yes** for a quick quote.

Chat		ſ
WDG Automation	123455789012 Sudio	
OK. Next I need to gather some base information about you.		
WDG Automation		
First, what's your email address		
WDG Automation		
	mary@email.com Stude	
What is your full name? Please use first name, last name.		
WDG Automation		
	Mary, Johnson	
	Studio	
And your address? For example: 1830 Arteique Road, Chicag	o IL, 60176	
WDG Automation		
	1 Main St, Austin, TX 78730	
	Studio	
Would you like a Quick Quote using our most popular cover-	age values?	
WDG Automation at 10:17:04 PM		1
yes	I X >>	

Narration

Now that all the information has been collected, the chatbot will invoke the quoting bot to generate the quote. The quote bot will enter all the customer information and retrieve the calculated quote amount. We see the quote amount in the chat response. The quoting bot will also initate the New Insurance Quote process. In this case the quote will be emailed to the customer and the process will wait for the customer's response.

• Enter **yes** for a follow-up contact.

hat	
What is your full name? Please use first name, last name.	,
WDG Automation	
	Mary, Johnson
	Studio
And your address? For example: 1830 Arteique Road, Chicago IL, 60176	
WDG Automation	
	1 Main St, Austin, TX 78730
	Studio
Would you like a Quick Quote using our most popular coverage values?	
WDG Automation	
	yes
	Studio
OK, I think I now have everything I need. Let me get a quote for you	
WDG Automation	
Alright, I'm back.	
Our insurance offer for your Lexus RX350 is 241.94.	
Do you want me to email the quote to you?	
WDG Automation at 10:17:38 PM	
🛋 yes	X ⊳

Action 4.3.12

• Enter **no** for anything else.

at	
Would you like a Quick Quote using our most popular coverage values?	
/DG Automation	
OK, I think I now have everything I need. Let me get a quote for you	
(DG Automation	
Alright, I'm back.	
Our insurance offer for your Lexus RX350 is 241.94.	
Do you want me to email the quote to you?	
/DG Automation	
OK, wil do, just a sec	
OK, wil do, just a sec DG Automation	
OK, wil do, Just a sec ^{OG Automation} Done. Quote sent to <u>mary@email.com</u> . We will wait for your response.	
OK, will do, just a sec OG Automation Done. Quote sent to <u>many@eemail.com</u> . We will wait for your response. To Automation	
OK, wil do, just a sec GC Advention Done. Quote sent to <u>many@email.com</u> . We will wait for your response. 00 Advention Anything else I can help you with?	

4.4 - View the quote status

Narration

Let's look in the workflow to see the process the bot initiated. We do that from the Process Portal. When we open the Quote Status dashboard, we see the new quote for Mary at the top of the list. Workflow will continue to manage the quote process.

Action 4.4.1

• From Chrome, open the Process Portal.



Action 4.4.2

• Log in as customerService / password.



Action 4.4.3

• Under Dashboards, click Show more....



• Click to open the **Quote Status** dashboard.

Customer Service	Quote Status								
Edit Profile Log Out									
् Dashboards 🗸 🗸	Quote S	tatus							
Create Saved Search									
🔛 Work	Quote Io	f First Name	Last Name	Vehicle Make	Vehicle Model	Vehicle Year	Quote Amount	Status	
Processes	6105	Mary	Johnson	Lexus	RX350	2021	241.94	Waiting for Customer	
Market Process Performance	6103	Stu	Smith	Toyota	Camry	1999	251.51	Waiting for Customer	
🐻 Team Performance	6053	Steve	Sweeny	Toyota	Tundra	2021	267.66	Waiting for Customer	
Show less	6003	John	Smith	Toyota	Tundra	2021	926.97	Waiting for	
Quote Status		00111	-	loyota	Tonora	2022		Customer	
् Launch 🗸 🗸	5953	Mary	Johnson	BMW	Х7	2021		Quote Exception	
X New Insurance Quote	5903	John	Smith	Lexus	RX450h	2021		Entering Quote	
X New Insurance Quote RPA	5805	Stuart	Leibowitz	Audi	S8	2021		Quote Exception	
	5804	Alice	Smith	Toyota	Tundra	2021	282.69	Waiting for Customer	
	5781	John	Smith	Volvo	Tundra	2021	880.26	Waiting for Customer	
	5778	Mary	Smith	Buick	Tundra	2021	887.15	Waiting for Customer	

Summary

Using the Cloud Pak for Business Automation, Future Corp had everything they needed to extend their automation with RPA. They used a low-code bot authoring environment to create bots and chatbots to improve their policy quoting process.

The enhanced solution continues to use workflow to manage and monitor the end-to-end quoting process while using RPA to automate manual tasks and to engage directly with customers using intelligent chatbots. This combines the ability of workflow and the abilities of RPA.

Thank you for attending today's presentation.