Alpha Presentation
Digital Assistant and Personal Financial Coach

The Capstone Experience
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Project Overview

• Chatbot interface that can answer basic questions about a member’s account
• Gives advice to members and can set goals for them
• Analyzes trends in member’s spending habits
• Compares member’s spending to other members in similar demographic
System Architecture

MSUFCU SQLite Database

DigitalOcean

HEROKU

LAMBDA

Dialogflow

amazon alexa

iOS App, Android App, MSUFCU Website, Facebook Messenger, and iMessage
Welcome, Kathryn.
How may I help you?

Alexa, transfer $500 from my checking account to another checking account.

6000.

Please enter the account number of the account you would like to transfer to.

Please confirm transferring $500 from your checking account.
Android App Screenshot

Enter message

MSUFCU Chatbot

Avengers

Thanks! You are now logged in.

add expense

MSUFCU Chatbot

Which expense would you like to add?

rent

MSUFCU Chatbot

How much is your new expense?

120

MSUFCU Chatbot

Successfully added expense.
Facebook Messenger

How much would you like to transfer?

Successfully transferred $25

Check balance

Which share would you like to check? You can say Checking, Savings, or the name of another share.

Your account balance is $1325
Website Chatbot

**DigitalAssistant**
Banking chatbot

- check balance
- checking
- Which share would you like to check? You can say Checking, Savings, or the name of another share.

Your account balance is $1325

- can i afford a tv?
- How much do you want to spend?
- 1500

No, you can not afford to spend $1500

Your account balance is $1325

How much do you want to spend?

No, you can not afford to spend $1500
What’s left to do?

• Financial planning services
  ▪ Offer savings plans, financial advice, etc. to users
  ▪ Will be added to “Afford” intent and in new intents

• Add more advanced intents
  ▪ Basic interactions done, working on debugging them
  ▪ Need intents that deal with more complex interactions/financial planning

• Expand machine learning
  ▪ Develop algorithms to analyze expenses/incomes
  ▪ Processing is done, but no conclusions drawn
Questions?