Beta 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
Android

MSUFCU Chatbot

Hello Beverly Crusher! How can I help you today?

what do people like me spend on groceries?

Edgar

Would you filter by age or income, Beverly?

income

Edgar

Members in your income demographic spent an average of $613.34 last month on Groceries, Beverly. Is there anything else I can help you with?
iOS
Web Application

I see you spent $124.62 at RadioShack, Taco Bell, Toys 'R' Us a number of times last month, Elim. You could save $18.69 if you cut back just 15% over the next month and $224.28 if you continue this trend over the next year! Would you like me to help you implement this savings plan?
Welcome, Kathryn. How may I help you?

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

6000.

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

Please say your Alexa PIN to confirm this transaction of $500 to account 6000.
What’s left to do?

• Make project video
• Write documentation
• Improve on existing testing module
• Vocal commands for web app
Questions?