Beta Presentation
Building Hopes and Dreams

The Capstone Experience
Team MSUFCU

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Fall 2019
Project Overview

- Hyper-personalized banking platform focused on members' hopes and dreams
- Quiz to build out initial user profiles with goals and interests
- Tips and offers provided based on quiz responses, transactional data, and member-set budgets
- Available to use on iOS and Alexa devices
- Employee-facing CRM available on web
System Architecture
iOS Application Quiz

If you suddenly received $20,000, what would be the first thing you did with it?

- Spend it on things I want
- Put it somewhere safe, like a savings account
- Invest it
- Donate it

Next Question →
iOS Application Dashboard

Estimated Goal Completion Time: 13 days
TIP: if you spend 20% less on Entertainment, you could reach your goal 3 days earlier.

iPhone 11
$435.72
saved out of $700.00

Your Budgets

Restaurants
$90.24 out of $200.00
Ideal Progress

Shopping
$191.54 out of $100.00
Ideal Progress
CRM Website Member Lookup Page

Client search filter
Please enter the information for the client.

First Name
- First Name Filter

Last Name
- Last Name Filter

Email
- Email Filter

Age
- Age Filter

Filter

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
<th>Age</th>
<th>Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>b</td>
<td><a href="mailto:msufcu@gmail.com">msufcu@gmail.com</a></td>
<td>20</td>
<td>Info</td>
</tr>
<tr>
<td>j</td>
<td>g</td>
<td><a href="mailto:hope@gmail.com">hope@gmail.com</a></td>
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<td>Info</td>
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<tr>
<td>Alison</td>
<td>Alsop</td>
<td><a href="mailto:aalsop@gmail.com">aalsop@gmail.com</a></td>
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<tr>
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<tr>
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</tr>
<tr>
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<tr>
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<tr>
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CRM Website Member Spending Page

Spending Amount

<table>
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<tr>
<th>Spending\Category</th>
<th>Travel</th>
<th>Restaurant</th>
<th>Shopping</th>
<th>Groceries</th>
<th>Transportation</th>
<th>Entertainment</th>
<th>Health</th>
<th>Other</th>
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</thead>
<tbody>
<tr>
<td>Month Spending</td>
<td>$882.68</td>
<td>$8,489.85</td>
<td>$7,818.45</td>
<td>$788.45</td>
<td>$74.15</td>
<td>$965.32</td>
<td>$574.15</td>
<td>$511.50</td>
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<tr>
<td>Budget</td>
<td>$328.32</td>
<td>$78.28</td>
<td>$748.25</td>
<td>$895.12</td>
<td>$78.56</td>
<td>$754.14</td>
<td>$115.23</td>
<td>$115.33</td>
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<tr>
<td>Difference</td>
<td>$554.36</td>
<td>$8,411.57</td>
<td>$7,070.20</td>
<td>-$106.67</td>
<td>-$4.41</td>
<td>$211.18</td>
<td>$458.92</td>
<td>$396.17</td>
</tr>
<tr>
<td>Percent</td>
<td>269 %</td>
<td>10845%</td>
<td>1045 %</td>
<td>88 %</td>
<td>94%</td>
<td>128%</td>
<td>498%</td>
<td>444%</td>
</tr>
</tbody>
</table>
Alexa

"Alexa, how close am I to my savings goal?"

"1501"

"Please say your passcode to continue."

"You are 400 dollars away from your goal."
What’s left to do?

- Bug fixes
- Edit goal and budgets
- Code cleanup
- UI improvements
- Push notifications
Questions?