FinBot

An Intelligent Chatbot for Your Personal Finance
Management.

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STATEMENT

As the sphere of personal finance expands everyday, The masses are being exposed to all sorts of novel avenues to invest and engage with their money in. From World-wide Stock Markets to payment of household bills, all of personal finance is being funneled through technology within your reach. This creates a situation where your personal finance is being punctuated by your engagement with technology. This avenue,mostly referred to as fintech , is shaping up to be a major factor in our lives. Thus, to help you shape your personal finance our team aims to build a simple yet intelligent chatbot which will provide personalized finance management to users based upon respective wallet details, account information and previous and scheduled expenditures. The chatbot will be developed as a responsive web application in which the user can explore the best possible responses by posting his/her queries.

In today's digital world, managing finances is a challenge being faced by individuals and organizations both. While people have some necessary scheduled expenses, impulsive expenditures often destroy the balance. This gives rise to the need of a mechanism to keep track of financial records and provide personalized advice too.

Our project is an attempt to address this issue, by providing the users with financial services which are personalized for them, minimizing human error and resolving client queries quickly through our chatbot.

Our Chatbot will manage requests in a fast and efficient way, and assist clients in conducting a variety of financial transactions securely in a conversational manner. From reviewing an account to making payments, and taking advice on a particular expenditure, the users can handle simple tasks on their own using this chatbot.

OBJECTIVE

Our program is interfaced with the user through a smart bot that greets you, introduces itself and provides information that it has collected of your personal financial situation. Then, the bot is optimized to provide the following information to a user:

- Wallet details (total money in the account, spent amount etc.)
- Scheduled funds
- Customer care services
- Advice on expenditures (whether a client should spend money for an event/cause)

- Categorical expenses that can be accessed and analysed using a pie–chart.

We aim to build a responsive web application for the same which will provide an interface of a dialogue box, using which the client will be able to write his/her queries and the bot will answer those questions in the best possible way.

Deliverables:

- Basic Financial Details of the User
- Graphical Representation of the financial statements of users for better representation.
- Interaction with the app so as to access User's financial information.
- Advice on Financial Decisions formulated through analysis by our trained models,

WORKFLOW

- Get an http request with a text from the user.
- Use Natural Language Understanding (NLU) to get the intent from the text.
- Use the trained model (an LSTM neural network implemented using Google's TensorFlow and Python) to predict the next action of the bot.
- Respond to the user.
- Wait for the next sentence from the user.