VIRGO Multi-Company Financial Dashboard — Master Build Canvas (v1)

1. PRODUCT OVERVIEW

A multi-company financial analytics platform where VIRGO:

- Connects each company to QuickBooks Online

- Syncs 24 months of categorized transactions + daily updates

- Stores all data centrally in Supabase

- Powers dashboards for P&L;, cash flow, KPIs, projections

- Future: conversational AI-built dashboards

Goal:

Build a scalable, future-proof data platform for internal companies today and external customers tomorrow.

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2. TECH STACK

Backend/Data:

- Supabase (Postgres, Auth, Storage, RLS, SQL Views)

- Pipedream (QuickBooks OAuth + syncing workflows)

- QuickBooks Online API

Frontend:

- Next.js 14

- TailwindCSS + shadcn/ui

- Vercel

AI (Future Phase):

- Gemini / Claude / GPT for conversational dashboard builder

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3. ACCOUNTS OWNED BY VIRGO (Already Set Up)

- Supabase Organization

- GitHub Repository

- Vercel Project

- Pipedream Workspace

- QuickBooks Developer App (Client ID + Secret)

These provide the full infrastructure foundation.

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4. DEVELOPER ACCESS REQUIRED

- Supabase project invite

- GitHub repo invite

- Vercel project invite

- Pipedream workspace invite

- QBO app credentials

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5. DATABASE REQUIREMENTS

CORE SCHEMA TABLES

- companies

- qbo_connections

- accounts

- categories

- raw_transactions

- monthly_pl

- monthly_cash_flow

- projections_12m

SQL VIEWS

- v_monthly_pl

- v_monthly_cash_flow

- v_kpis

FUTURE TABLES

- dashboard_widgets

- widget_layouts

- widget_queries

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6. DATA PIPELINE (Pipedream)

Workflow A — QuickBooks OAuth Connect

Workflow B — 24-Month Backfill

Workflow C — Daily Incremental Sync

Workflow D — Error Logging

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7. FRONTEND REQUIREMENTS

- Supabase Auth Login

- Company Selector

- Overview Dashboard

- P&L; Visualization

- Cash Flow Charts

- KPI Summary Section

- Layout inspired by budds-dashboard.vercel.app

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8. ONBOARDING FLOWS

Phase 1 (Internal):

- VIRGO adds companies manually

- Developer connects QuickBooks accounts

Phase 2 (External Customers):

User → Sign Up → Add Company → Connect QuickBooks → Dashboard Loads

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9. DELIVERABLES

- Complete schema + migrations

- All Pipedream workflows functioning

- Fully working QBO sync (historic + daily)

- Dashboard with P&L;, Cash Flow, KPIs

- Auth + RLS configured securely

- Vercel deployment with production build

End of VIRGO Financial Dashboard — Master Build Canvas (v1)