**Step-by-Step: Lovable Prompts and Flow Block Configurations**

**1. Connect Bank Transactions (via Plaid)**

**Prompt (in Lovable)**:  
No prompt needed here — instead, use **Webhook Block** or **Manual Import Block** to:

* Receive data from **Plaid**
* Upload as JSON or CSV into Lovable's **Database Block**

**Sample Data Structure**:

json

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{

"date": "2025-05-01",

"amount": -48.99,

"description": "UBER TRIP",

"merchant\_name": "Uber",

"account\_type": "Checking"

}

**2. Create a Transaction Database**

**Lovable Table Fields**:

* **Date** (Date)
* **Amount** (Number)
* **Merchant** (Text)
* **Description** (Text)
* **Predicted Category** (Text)
* **Is Recurring?** (Yes/No)

**3. AI Agent for Transaction Categorization**

**Block Type**: **AI Prompt Block**  
**Trigger**: On new row in Transactions Table

**Prompt**:

text

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You are a financial assistant. Your task is to classify bank transactions into standard budget categories.

Please categorize this transaction:

Merchant: {{merchant\_name}}

Description: {{description}}

Amount: {{amount}}

Date: {{date}}

Respond ONLY with the most accurate category label, such as:

- Food & Dining

- Transportation

- Bills & Utilities

- Entertainment

- Health

- Travel

- Personal

- Other

Category:

**Output Target**: Predicted Category column in the same row

**4. AI Agent to Detect Recurring Transactions**

**Block Type**: **AI Prompt Block**  
**Prompt**:

text

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Is the following transaction likely to be recurring monthly or weekly?

Merchant: {{merchant\_name}}

Description: {{description}}

Amount: {{amount}}

Date: {{date}}

Answer: Yes or No.

**Output Target**: Is Recurring? column

**5. Automation Flow**

**Flow Trigger**:

* Event: New Transaction Added to Table

**Flow Steps**:

1. Run **Categorization Prompt**
2. Run **Recurring Check Prompt**
3. (Optional) Send notification to user or update dashboard

**6. Visualization Blocks**

Use the **Chart Block** to create:

* **Pie Chart**:
  + Data: Transactions Table
  + Value: Sum of Amount
  + Group by: Predicted Category
* **Bar Chart**:
  + X-Axis: Date (grouped weekly/monthly)
  + Y-Axis: Total Amount
  + Filter: Only Food & Dining (or top 5 categories)

**7. AI-Powered Financial Assistant (Chat Block)**

**Block Type**: **Chat Interface with AI Agent**

**Context Prompt**:

text

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You are a personal finance chatbot with access to a user's categorized transaction history. Based on this, answer financial questions such as:

- "What’s my total spending this month?"

- "How much did I spend on transportation last week?"

- "What are my top 3 merchants?"

You can access the following table:

[Transactions Table: date, merchant, amount, category]

Always use simple, clear summaries.