

**Re: Heroku links to**

Leeanna Kohn-Hardy <leeanna.kohn-hardy@finappster.co.nz>

Tue 19/04/2022 5:16 PM

To: Chris Stehlin <prq5006@autuni.ac.nz>

Cc: Barry Dowdeswell <barry.dowdeswell@aut.ac.nz>; John Isaiah Sangalang <jsj6212@autuni.ac.nz>; Peter Scandle <vzp7444@autuni.ac.nz>; Jose Santos <sff4900@autuni.ac.nz>

Heya

As mentioned, be great if you can confirm:

- how the preferences are calculated (as a FYI for me)
- re Peter's suggestion whether there are any limitations to the xlsx (ie no. of rows, file size, data points etc)
- would also be good if the Upload Shares button worked, however, attached are the two .xlsx I've been using to test this.

For the purposes of keeping this moving if you can let me know if there are any xlsx limitations then let's proceed on that basis. You indicated that it didn't matter where the 17x SDG columns went so I'll sort a new "raw data" sheet out.

As mentioned I'm away after tomorrow, for a week, so let me know if you have any other questions? I'll be online but might not be immediately available.

Kind regards

**Leeanna**

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**From:** Chris Stehlin <prq5006@autuni.ac.nz>

**Sent:** Friday, 15 April 2022 19:39

**To:** Leeanna Kohn-Hardy <leeanna.kohn-hardy@finappster.co.nz>

**Cc:** Barry Dowdeswell <barry.dowdeswell@aut.ac.nz>; John Isaiah Sangalang <jsj6212@autuni.ac.nz>; Peter Scandle <vzp7444@autuni.ac.nz>; Jose Santos <sff4900@autuni.ac.nz>

**Subject:** Heroku links to

Hi Leeanna,

Please find below two links to the data upload application and the latest finappster version with share and recommendation functionality respectively.

<https://finappster-sigma-data-upload.herokuapp.com/>  
<https://finappster-sigma-frontend-stag.herokuapp.com/>

Also find attached the excel file template to be used when uploading/updating shares in the share table. You'll see it currently has the SDG data from the template you sent through to us on the 3p data file – feel free to change the values within the columns as you will. **One note on that though, any complete removal or reduction in the number of rows on the template requires selecting the 'Entire row' option via delete when performing such actions on any given rows. The other deletion options or other methods such as 'Clear Contents' will cause issues with subsequent upload attempts so keep that in mind when removing or changing rows within the template.**

share/company name	ISIN code	No poverty	Zero hunger	Good health & wellbeing	Quality education	Gender equality	Clean water & sanitation	Affordable & clean energy	Decent work & economic growth	Industry innovation & infrastructure	Reduced inequalities	Sustainable cities & communities	Responsible consumption & production	Climate action
BHP	AU000000BHP4	33.333333%		0.000000%	0.000000%	0.000000%		0.024213%	0.000000%		0.000000%			177.48
Commonwealth Bank of Australia	AU000000CBA7	33.333333%		0.000000%	0.000000%	0.000000%		0.769336%	0.000000%		0.000000%			1.311
CSL	AU000000CS9	33.333333%		0.000000%	0.000000%	0.000000%	0.000000%	2.499900%	0.000000%		0.000000%			2.174
Intel Corporation	AU000000IDC9	33.333333%		0.000000%	0.000000%	0.000000%		57.546493%	0.000000%		0.000000%			101.779
Telstra Corporation	AU00000043473	33.333333%		0.000000%	0.000000%	0.000000%		0.620681%	0.000		0.000000%			48.429
Charles Schwab Corporation	US005131055	33.333333%		0.000000%	0.000000%	0.000000%		0.665039%	0.000	Delete ? X	0.000000%			0.130
EOG Resources, Inc.	US26875P1012	33.333333%		0.000000%	0.000000%	0.000000%	0.000000%		0.000		0.000000%			13.054
Fletcher Building	NZBUED00150	58.333333%		36.200508%	18.954476%	18.001761%	0.000000%	29.330313%	29.11%	Delete	0.000000%			13.4237%
Goldman Sachs	US39141G1040	33.333333%		0.000000%	0.000000%	0.000000%		86.035961%	0.000	<input type="radio"/> Shift cells left	0.000000%			2.296
Meridian Energy	NZMELE000257	66.666667%		35.713405%	20.463151%	29.432153%		70.087183%	28.55%	<input type="radio"/> Shift cells up	0.000000%			16.268
3M Company	US88579Y1010	33.333333%		0.000000%	0.000000%	0.000000%		78.996439%	0.000	<input checked="" type="radio"/> Entire row	0.000000%			0.036
Advanced Micro Devices Inc	US0079031078	33.333333%		0.000000%	0.000000%	0.000000%	0.000000%	0.000000%	0.000	<input type="radio"/> Entire column	0.000000%			5.005
FedEx Corporation	US31428X1063	33.333333%		0.000000%	0.000000%	0.000000%	0.000000%	48.786766%	0.000	OK Cancel	0.000000%			1.481
Novo Nordisk A/S	DK0060534915	33.333333%		0.000000%	0.000000%	0.000000%		40.316218%	0.000		0.000000%			0.069
PayPal Holdings Inc	US70450Y1038	33.333333%		0.000000%	0.000000%	0.000000%		99.853274%	0.000		0.000000%			0.948
Abbott Laboratories	US0028241000	33.333333%		0.000000%	0.000000%	0.000000%		41.779813%	0.000		0.000000%			3.669

The data upload app currently supports share uploading and updating. Fund features are disabled at the moment until we reach a consensus on how to address implementation. Simply click the 'Choose File' button, navigate to the location of the excel file template attached in this email that you have edited as you liked, and click the 'Upload Shares' button.

The finappster frontend link is your current website with navigation to the quiz added as an option on an empty dashboard. You can click 'Discover my values' to take the quiz and then complete it to reach the 'My Values' page with your share recommendations and your quiz 5p score. As it is currently an early proof of concept, we haven't yet added other ways to reach the quiz and recommendation pages currently, so we suggest you only use it for testing the quiz and seeing your results and recommendations for now.

Welcome to Finappster!

To start tracking your portfolio, you'll need to add some investments.

You can do this easily, by connecting your cryptocurrency wallets. The information from these accounts will be pulled through, so you can start tracking the performance of your investments, straight away.

If you don't want to add your cryptocurrency wallets, or would like to add your shares, you can manually add your investments yourself. The market price and returns will be up-to-date.

Discover my values

Manually add

Connect

As mentioned in an earlier email, a breakdown on the recommendation algorithm and the SDG to 5p conversion formula will be sent through sometime tonight.

That about covers it for now. Feel free to shoot back with any questions.

Thanks,  
Chris