

Problem Definition

 Friend is doing a start up to offer business services to Gamers & Creatives

 Services include business entity creation, expense/revenue management, taxes, wealth management

Currently downloading bank information manually to process

Not scalable

Final Project Definition – Option 2

Create a back end callable library in Python to access Plaid API's

• Information stored in db, by customer, by account

 Plaid is a banking interface platform used by many software companies (like Stripe & CoPilot) to securely get banking information

Front end will be written in React Native but is "fudged" for this presentation

Setup

- Get Plaid API keys
- Plaid offers three environments:
 - Local server to build and test on (used for this project)
 - Sandbox with a variety of accounts for further testing
 - Production for actual use
- Downloaded and built local back-end server
- Downloaded and built front end web app to test that local server was working and to get token

Setup

• Downloaded open source database PostgreSQL 12.6

• Installed python library to access above database - psycopg2

 Created Customer table for access id's, Accounts Table for listing of accounts by customer and Txn table for banking txns for each set of accounts

Added a few records to test with

Next Steps

- A real front end that uses Plaid's Link to get credentials
 - Planning on using React Native to build
- Build out database schema. Need A LOT more information to be stored
- Move database to cloud
- Classify txns based on history
 - Goal is to identify txns in an almost real-time basis and text owner if necessary to classify as business or personal
 - Use machine learning to minimize texting
- Error checking! Everywhere!