

Credentials stored in DB?

So the flow is very driven by linking...

↳ Maybe I have private web server.

Really though will need to understand security

↓

* Maybe then I need to add users to my DB

then from there control access?

↓

So yes. But lets come back to this. feather.id
Havena

Basically what is the goal?

~~1. log in to bank~~

↳ log into wells fargo

↳ go through my transactions.

Would like to

Bank (Institution)

transaction

• transactions
• id

Accounts

• type

investment transaction → manual
↳ Bitcoin
↳ Stocks
↳ Bonds

investment holdings

PLAID

Accounts

Account Balance

Account Historical Balance

only on
server side
Not expandable
↳ institutions
↳ id
↳ institutions.id
↳ name
↳ logo
↳ plaid.accounts.id
↳ accounts
↳ amount
↳ iso_currency_code
↳ date
↳ transaction
↳ transaction_categories
↳ tx_id
↳ amount
↳ iso_currency_code
↳ date
↳ category_id
↳ description
↳ type
↳ value

MANUAL

Investment Holdings

↳ Security.id
↳ date purchased
↳ quantity
↳ price - purchased
↳ cost basis

Historical Value

↳ Security.name
↳ ticker symbol
↳ value
↳ updated_at
↳ type
↳ closed

↳ Security History
↳ value
↳ created
↳ time

↳ Statistically generate pages? :)

If you want access then do e...

↳ Google Sheets?
↳ Do?

For transactions.

Need a backup.

(later)

↳ update on the lower
layer daily

now, front-end

↳ DB

back-end

tx.id
cat.id

finished:

④ front end to input creds (into DB)

↳ Plaid Quickstart

④ backend (input)

every-hour :

go through all accounts :

if plaid (transaction) :

update all transactions

else (investment) :

update all securities

④ exposing to people.

↳ Need to think how to do effectively

How to extend the DB?

↳ Say I got data for security,
but now I want to watch it
too... New table?

May-li :

Basically I need to put more code out there.

Here's what I believe & here's what I've done:

→ Writing
~~④~~ ④ → Creating (code)

→ Intention only matters if you've already done something.

④ Here's what I believe, here's what I don't believe.

↑
go for walk/run on this topic.
Maybe write tonight on this as well.

What more can I do?

↳ How can I do it now.