

# BANK BROKER

PoC Web Application

FINAL PROJECT 2026  
HDip in Computer Science  
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# INTRODUCTION

Marian Sheehy

Finance Professional with over 20 years experience



<https://github.com/MarianSheehy/bankBroker>



<https://www.linkedin.com/in/marian-sheehy-fca-a628793b/>



<https://www.youtube.com/watch?v=bwyiKqpiMNI>

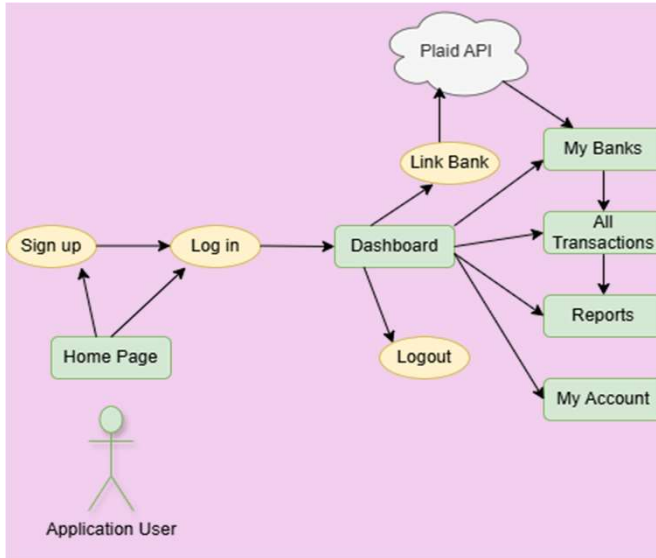


# DEMONSTRATION

This Won't Take Long!!



# FRONT & BACK



```
users {
  _id      objectId
  __v     int
  email   string
  firstName string
  lastName string
  password string
}
```

```
plaiditems {
  _id      objectId
  __v     int
  accessToken string
  bankName string
  createdAt date
  cursor   (mixed)
  institutionId null
  institutionName (mixed)
  itemId   string
  updatedAt date
  userId  string
}
```

```
plaidtransactions {
  _id      objectId
  __v     int
  accountId string
  amount   (mixed)
  createdAt date
  date     string
  isoCurrencyCode string
  itemId   string
  merchantName null
  name     string
  pending  bool
  personalFinance ({} ^)
  _id      objectId
  confidence string
  detailed  string
  primary  string
  version  string
  personalFinance raw ({} ^)
  transactionId string
  updatedAt  date
  userCategory null
  userId    string
}
```



# PLAID



<https://dashboard.plaid.com/signup>



<https://www.youtube.com/@PlaidInc>

```
Let's connect to my...  
  
const tokenResponse = await plaidClient.linkTokenCreate({  
  user: { client_user_id: userId },  
  products: ["transactions"],  
  client_name: "Manage my money",  
  language: "en",  
  country_codes: ["US"],  
  webhook: WEBHOOK_URL,  
});
```

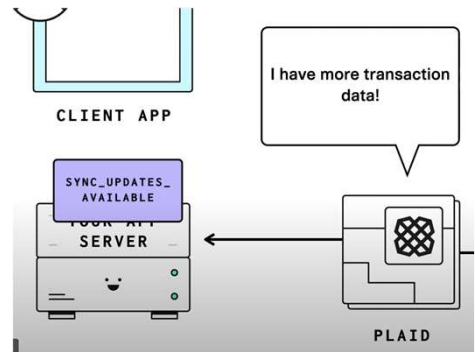
### Keys

Client ID

69b8939f03c484000db1746b

Sandbox secret

ea7db80c80dfca238065d877b95357



## PROBLEMS ENCOUNTERED

- Initial starting website was the wrong choice – switched to another so lost some time
- Didn't get time to implement Okta
- Version error on Studio 3T – switched to MongoDB Compass instead
- Overall struggled with work/life/project pressure – almost quit a few times!



## AI REFLECTION

- Helpful to save time writing code
- Thankful to have learned enough to understand where the suggested code is placed
- Helpful to point out cause of specific errors
- Re communication and grammar, I am thankful to be old enough to not need AI day to day!
- Teaching & testing AI would be an interesting field to get into
- Could have a negative impact on future intelligence & independent thinking



## WHAT I LEARNED

- Plaid software, in particular transactions
- bcrypt hashing
- AI usage
- Time management
- Confirmation that I am definitely not a quitter!



## FUTURE DEVELOPMENT

- Implement live version of Plaid – test on my own bank accounts
- Expand the reporting element
- Monitor Plaid's feature releases especially re business banking
- Implement live version of Plaid – test on business accounts (& business expense categories)
- Connect Okta to increase security – test in the real world

