**Command Set-1**

* Fill light Purple colour background in Filter Pane and Add/Edit Modal form of 2\_Expanse\_Index.html
* Increase the width of whole panel by 1 Inch and stretch all fields so the texts with in each dropdown fits properly.
* All fields and dropdowns must have even spacing between them.
* Category, Amount (Numeric, 2 places of Decimal, right aligned), Tag, Holder should be one line
* Due Date, Currency, Amount and Paid Date should be on second line
* Frequency, Account Status and Transaction Status should be on 3rd line and must align in overall width of three lines above
* The PDF will always be created in Landscape format. It will have a report Title as Expanse Filtered Report (Font Size 16, bold). In second line it will mention the Filter Criteria (Font Size 12) used for the report. For Example: Category = Bill Payment, Assignee = Alice, Priority = High and Status = Pending. Date From: 2025/01/01 Date To: 2025/12/31. Below these criteria the data will be shown with all fields in an Excel Data Table format with no overlapping of field. If needed it can be sacled down to fit all records in A4 size landscape format. Try put keep report as compact as possible with at least 20 records per page. In the footer section also mention page numbers in format Page 2/5 (Left Aligned) and all dates must be printed in format YYYY/MM/DD. The Downloaded report will have the name format as Expanse\_Filter\_Report\_YYYY-MM-DD\_HH-MM.pdf.

**Command Set-2**

Use exactly same UI settings, controls and functionality as in 2\_Expanse\_Index.html, 2\_Expanse\_Style.css, 2\_Expanse\_Main.js and generate 3 new files as 3\_Income\_Index.html, 3\_Income\_Style.css, 3\_Income\_Main.js. The data fields on this form/ files new files needs to be modified as under:

* The word Expanse need to be Replaced everywhere with Income.
* Fill light green colour background in Filter Pane and Add/Edit Modal form
* Expance\_Description to Income\_Description
* Category\_Expanse to Category\_Income
* Ac\_Tag\_Expance to Ac\_Tag\_Income
* Paid\_Date to Income\_Date
* Ac\_Holder: No changes
* Txn\_Tag: No changes
* Amount: No changes
* Payment\_Mode: No changes
* Frequency: No changes
* Ac\_Status: No changes
* Txn\_Status: No changes
* Due\_Date: Not Required on this form
* Paid\_From: Not Required on this form

Do not link it to Index.html we wanted to test the functionality First.

**Command Set-3**

Use exactly same UI settings and controls in 2\_Expanse\_Index.html, 2\_Expanse\_Style.css, 2\_Expanse\_Main.js and generate 4\_Investment\_Index.html, 4\_Investment\_Style.css, 4\_Investment\_Main.js. The data fields on these new files/form needs to be modified as under:

* The work Income need to be Replaced everywhere with Investment.
* Fill light pink colour background in Filter Pane
* Income\_Description to Investment\_Description
* Category\_Income to Category\_Equity
* Ac\_Tag\_Income to Ac\_Tag\_Equity
* Income\_Date to Invest\_Date
* Due\_Date to Maturity\_Date
* Ac\_Holder: No changes
* Txn\_Tag: No changes
* Amount: No changes
* Payment\_Mode: No changes
* Frequency: No changes
* Ac\_Status: No changes
* Txn\_Status: No changes
* Paid\_From: Not Required on this form

This new interface needs to be linked with Sidebar Menu item “Investments”

**Command Set-4**

Use exactly same UI settings and controls in 2\_Expanse\_Index.html, 2\_Expanse\_Style.css, 2\_Expanse\_Main.js and generate 5\_Task.html, 5\_Task\_Style.css, 5\_Task\_Main.js. The data fields on these form/ files needs to be modified as under:

* Fill light orange colour background in Filter Pane
* Expance\_Description to Task\_Description
* Category\_Expanse to Category\_Task
* Ac\_Tag\_Expance to Task\_Tag
* Paid\_From: Not Required on this form
* Task\_Status (New Field from Dropdown)
* Task\_Assignee (New Field from Dropdown)
* Task\_Priority (New Field from Dropdown)
* Due\_Date: Due-Date
* Completed-On (New Date Field)

Apart from mentioned above fields rest are not required here.

This new interface needs to be linked with Sidebar Menu item “Manage Tasks”

**Load Local Data Implementation**

Complete Implementation for Load Local Data (Sidebar Item upon click)

Purpose: Once data uploaded vis this method the data gets populated among all its sub parts and logics

Step 1: Overwrite Warning First as warning popup [with "Cancel" or "Yes, Overwrite Data"], if existing data exists Else when No Existing Data: Proceeds directly to file picker

Step 2: File Picker After Confirmation: File picker opens for file selection [Only accepts .xlsx,.json, .sqlite, .db files are accepted]; Shows alert for invalid file types.

Step 3: Toast Notification

✅ Success Toast: Shows green toast notification after successful upload

✅ Beautiful Animation: Slides in from right, stays for 3 seconds, slides out

✅ Professional Styling: Matches ClearView 1.0 theme

Step 4: Backup Folder Setup: Offers Option to set default backup folder after data upload by giving File Picker prompt to enter backup folder path; Default Fallback: Uses "Downloads" if no path specified and Users can skip backup setup

Step 5: Hover Tooltips: Load Local Data Sidebar Item:

✅ Dynamic Tooltip: Shows current loaded file path on hover

✅ Default Message: Shows "Click to load local data files" when no file loaded

✅ Real-time Updates: Updates tooltip after successful file upload

Step 6: Backup & Export Sidebar Item:

✅ Backup Path Display: Shows backup folder path on hover

✅ Default Message: Shows "Click to set backup folder" when not set

✅ Real-time Updates: Updates tooltip after backup folder setup

Command Set – 5

I wanted you to edit the variable names as under this because my actual data variables from my master file which will later on populate Task Dashboard and other places (Manage Master Data), so to avoid conflicts later on these has to match

desc - Task\_Description

cat - Category\_Task

tag - Task\_Tag

status - Task\_Status

assignee - Task\_Assignee

priority - Task\_Priority

due - Due\_Date

completed - Completed\_On

There is one more field "Task\_Adhoc" it need not to be displayed anywhere, i will explain its use later on. After changing variable names I wanted to verify everything works fine.

Command Set – 6

Update the table headers to match the filter pane background and make the text bold.

Command Set – 7

Note that Payment\_Mode, Txn\_Tag, Ac\_Status,Txn\_Status,Frequency are used in Expanse, Income and Investment Dashboards and should not be padded with in any other prefix or suffix. Please update Expanse Dashboard variables to accommodate this change and I suggest read excel file once again and align variable names once again.