

Wel Fy - Complete Feature Overview

AI-Powered Receipt Recognition

Live OCR Camera Scanning

The mobile app features a real-time OCR camera that instantly recognizes and extracts data from receipts as you point your camera at them. The advanced vision recognition technology:

- Detects receipt boundaries automatically
- Extracts merchant name, date, amount, and line items in real-time
- Works with various receipt formats and layouts
- Handles multiple languages
- Processes crumpled, faded, or partially damaged receipts
- Provides instant visual feedback showing recognized text

Smart Data Extraction

Once a receipt is captured, the AI automatically:

- Identifies the merchant/vendor name
- Extracts the transaction date and time
- Recognizes the total amount and currency
- Detects individual line items with prices
- Extracts VAT/tax information
- Suggests the most appropriate expense category based on merchant type and items
- Calculates per-person amounts for shared expenses

Manual Review & Editing

While AI does most of the heavy lifting, you maintain full control:

- Review all extracted data before saving
- Edit any field with a single tap

- Add additional notes or descriptions
- Assign custom categories
- Add or remove receipt images
- Set expense-specific details like number of people

Expense Management

Creating Expenses

Photo-Based Entry

1. Open the camera within the app
2. Point at your receipt
3. Capture the image
4. Review AI-extracted data
5. Confirm and save

Manual Entry

For expenses without receipts:

- Enter amount, date, and description manually
- Select from predefined or custom categories
- Add subcategories for detailed tracking
- Attach photos later if needed
- Set merchant name and location

Expense Details

Each expense includes comprehensive information:

- Amount: Numeric value with currency support
- Date: Transaction date with time (optional)
- Merchant: Vendor or business name
- Category: Primary expense classification (meals, transport, accommodation, etc.)
- Subcategory: More specific classification
- Description/Title: Custom notes or expense name
- Number of People: For shared expense calculations
- Receipt Images: Multiple photos per expense
- Report Assignment: Which expense report(s) this belongs to
- Created/Updated Timestamps: Full audit trail
- Sync Status: Tracking for offline/online synchronization

Editing Expenses

Modify any expense at any time:

- Tap to edit any field
- Update receipt images (add, remove, or replace)
- Change category or subcategory
- Reassign to different expense reports
- Add detailed notes or descriptions
- Split into multiple expenses if needed

Deleting & Archiving

Clean up your expense list:

- Archive: Hide old expenses without deleting (reversible)
- Delete: Permanently remove expenses
- Bulk Operations: Archive or delete multiple expenses at once
- Confirmation Prompts: Prevent accidental deletions
- Separate Archive View: Access archived items when needed

Expense Report Organization

Creating Expense Reports

Build organized collections of related expenses:

- Custom Title: Name your report (e.g., "Milan Business Trip Q1 2025")
- Description: Add detailed notes about the report purpose
- Date Range: Set start and end dates for the reporting period
- Automatic Date Suggestions: Smart defaults based on your expenses
- Status Tracking: Draft, submitted, approved, or rejected

Managing Reports

Report Dashboard

The main view shows:

- List of all active expense reports
- Total amount per report
- Number of expenses in each report
- Date range covered
- Current status
- Last updated timestamp
- Quick actions (edit, view, archive)

Report Details Page

Dive deep into each report:

- Summary Statistics:

- Total amount for all expenses in report
- Current month total (expenses from current calendar month)
- Previous month total (expenses from previous month)
- Count of expenses
- Filtered totals when filters are active
- Expense List:
 - All expenses assigned to this report
 - Sortable by date, amount, category, merchant
 - Multiple view options (list, grid, table)
 - Color-coded by category
 - Quick preview of receipt images
- Filtering & Search:
 - Filter by date range
 - Filter by category/subcategory
 - Filter by amount range
 - Search by merchant name or description
 - Save filter presets
 - Clear all filters with one tap

Adding Expenses to Reports

Multiple ways to assign expenses:

- During expense creation (select report from dropdown)
- From expense detail screen (change report assignment)
- Bulk selection mode (select multiple expenses and assign)
- Transfer between reports

Report Actions

Editing Reports

Modify report details:

- Change title or description
- Adjust date ranges
- Update status
- Add notes for reviewers/approvers

Archiving Reports

Clean up completed reports:

- Archive old reports to reduce clutter
- Archived reports remain accessible
- Separate "Archived Reports" section
- Restore archived reports if needed
- All expenses within remain accessible

Exporting Reports

Generate reports for submission:

- Export as PDF with receipt images
- Export as Excel/CSV for accounting
- Email directly from app
- Share via cloud services
- Customizable export templates

Filtering & Search

Advanced Filtering System

The app features powerful filtering across both mobile and web:

Date Filters

- Predefined Periods:
 - Today
 - Yesterday
 - This Week
 - Last Week
 - This Month
 - Last Month
 - This Quarter
 - This Year
- Custom Date Range:
 - Select any start date
 - Select any end date
 - Visual date picker
 - Quick date selection shortcuts

Category Filters

- Filter by main category
- Filter by subcategory
- Multiple category selection
- Category-based color coding
- Category statistics

Amount Filters

- Minimum amount threshold
- Maximum amount threshold

- Range selection
- Quick amount presets

Text Search

- Search merchant names
- Search expense descriptions
- Search notes and titles
- Real-time search results
- Search history

Combined Filters

- Apply multiple filters simultaneously
- See active filters at a glance
- Clear individual filters
- Clear all filters button
- Save filter combinations
- Filter result count display

Sorting Options

Order your expense list by:

- Date (newest/oldest first)
- Amount (highest/lowest first)
- Merchant (alphabetical)
- Category
- Creation date
- Last modified date

Analytics & Insights

Visual Dashboard

The main dashboard provides at-a-glance insights:

- Total Spending: Current period total
- Category Breakdown: Pie chart showing distribution
- Monthly Trends: Line graph of spending over time
- Top Merchants: Your most frequent vendors
- Recent Activity: Latest expenses and reports

Month-Based Reporting

Automatic monthly calculations:

- Current Month View: All expenses in current calendar month
- Previous Month Comparison: Compare to last month
- Month-over-Month Trends: Spending increase/decrease
- Category Shifts: How spending patterns change monthly

Spending Insights

Intelligent analysis of your expenses:

- Average expense amount
- Most common categories
- Spending patterns (day of week, time trends)
- Unusual expenses flagged
- Budget vs. actual (when budgets set)

Report Analytics

For each expense report:

- Total amount with visual indicator
- Breakdown by category (chart view)
- Timeline of expenses added
- Completion status
- Compliance indicators

Synchronization

Multi-Device Sync

Keep all your devices in sync:

- Automatic Background Sync: Runs periodically without user action
- Manual Sync: Pull to refresh or tap sync button
- Real-Time Updates: Changes appear on all devices within seconds
- Conflict Resolution: Smart handling of simultaneous edits
- Sync Status Indicators: Visual feedback on sync state

Offline-First Architecture

The mobile app is designed for offline use:

- Full Offline Functionality:
 - Create, edit, and delete expenses without internet
 - All data stored locally in SQLite database
 - Receipt images saved on device
 - Changes queued for sync when online
- Intelligent Sync:
 - Automatic sync when connection restored
 - Bandwidth-optimized transfers

- Resume interrupted syncs
- Priority sync for critical data

Sync Conflict Management

Handles edge cases gracefully:

- Last-write-wins strategy for most data
- Manual resolution for critical conflicts
- Conflict history tracking
- Rollback capabilities
- Detailed sync logs for troubleshooting

User Interface

Mobile App Design

Home Screen

- Quick expense add button (floating action button)
- Recent expenses list
- Summary statistics cards
- Quick filters
- Navigation menu

Expense List View

- Card-based layout for easy scanning
- Swipe gestures for quick actions (archive, delete)
- Pull to refresh

- Infinite scroll loading
- Empty states with helpful messages

Camera Screen

- Full-screen camera view
- Live OCR overlay showing detected text
- Manual capture button
- Flash toggle
- Gallery access
- Multiple capture mode

Expense Detail Screen

- Large receipt image viewer
- Pinch to zoom on receipts
- All expense information in organized sections
- Edit button for quick modifications
- Share/export options

Table Views

- Sortable columns
- Resizable columns
- Row selection for bulk operations
- Pagination or infinite scroll
- Export to CSV/Excel

Categories

Predefined Categories

Standard expense categories included:

- Transport: Fuel, tolls, parking, public transport, taxi
- Meals: Breakfast, lunch, dinner, client meals, team meals
- Accommodation: Hotels, Airbnb, lodging
- Office: Supplies, equipment, furniture
- Travel: Flights, trains, car rental
- Entertainment: Client entertainment, team events
- Communications: Phone, internet, postage
- Professional Services: Consulting, legal, accounting
- Training: Courses, conferences, workshops
- Other: Miscellaneous expenses

Subcategories

Detailed classification within main categories:

- Transport → Fuel, Parking, Taxi, Public Transport
- Meals → Breakfast, Lunch, Dinner, Snacks, Coffee
- Accommodation → Hotel, Apartment, Other
- Custom subcategories can be added

Custom Categories

Create your own:

- Add unlimited custom categories
- Set category colors
- Define category-specific rules
- Set default subcategories
- Category-based budgets

Search & Discovery

Global Search

Search across all data:

- Expenses by merchant, description, or amount
- Expense reports by title or description
- Date-based searches
- Full-text search capabilities
- Search suggestions as you type
- Search history

Smart Filters

Intelligent filtering options:

- Unassigned expenses (not in any report)
- Expenses without receipts
- High-value expenses (above threshold)
- Recent expenses (last 7/30 days)
- Pending sync items
- Archived vs. active

Bulk Operations

Multi-Select Mode

Perform actions on multiple items:

- Tap checkbox to enter selection mode
- Select multiple expenses
- Bulk actions available:
 - Assign to expense report
 - Move to different report
 - Archive selected
 - Delete selected
 - Export selected
 - Change category

Select All/None

- Select all visible expenses
- Select all filtered results
- Clear selection
- Invert selection

Profile & Settings

User Profile

Manage your account:

- View profile information
- Update name and email
- Change password
- Upload profile picture
- View account creation date

- Account statistics (total expenses, reports)

App Settings

Customize your experience:

- Default currency
- Date format preferences
- Number format (decimal separator)
- Default expense category
- Auto-sync frequency
- Notification preferences
- Theme selection (light/dark)
- Language settings

Privacy Settings

Control your data:

- Export all data
- Delete account
- View privacy policy
- Manage consent preferences
- Data retention settings

Notifications

Push Notifications (Mobile)

Stay informed:

- Sync completion alerts

- Report status changes
- Expense approval notifications
- Reminder notifications
- Error alerts

In-App Notifications

- Success messages
- Error messages
- Warning messages
- Information tips
- Action confirmations

Export & Sharing

Export Formats

- PDF: Professional reports with receipt images
- Excel/CSV: Spreadsheet format for accounting
- JSON: Raw data export
- Images: Receipt image archive (ZIP)

Sharing Options

- Email directly from app
- Share via messaging apps
- Save to cloud storage (Google Drive, Dropbox, iCloud)
- Copy to clipboard

Report Templates

- Customizable PDF templates
- Company branding options
- Include/exclude receipt images
- Summary vs. detailed reports
- Multi-page layouts

Security Features

Authentication

- Secure login with email/password
- JWT token-based sessions
- Automatic session timeout
- Remember me option
- Logout from all devices

Data Security

- End-to-end encryption for sensitive data
- Secure local storage
- HTTPS for all communications
- Secure file uploads
- Protection against common vulnerabilities

Privacy

- GDPR compliant
- Transparent data practices

- User data control
- Right to deletion
- Data portability

Accessibility

Mobile Accessibility

- Screen reader support
- High contrast mode
- Adjustable font sizes
- Voice commands
- Haptic feedback
- Gesture alternatives