DAY 2 TASKS

Task 1: App idea and user flow
User Flow (Step-by-Step)

Step	User Action	Platform Response
1	User logs into the Smart Expense Planner	Authenticates via Microsoft login
2	User selects "Create New Budget Plan."	Navigates to input screen
3	User enters budget details, business type, purchase plans, and uploads documents	Data saved to Dataverse
4	User clicks "Generate Plan."	Triggers Power Automate flow
5	AI Builder or Azure ML processes data, assesses risks, and builds a personalized plan	Returns structured JSON
6	Personalized plan, risks, and recommendations are shown in-app	Data visualized in Power Apps screen
7	User explores interactive dashboard (Power BI embed)	Can toggle assumptions or simulate scenarios
8	Automated alerts or weekly summaries sent via email	Power Automate handles scheduling
9	User exports report or shares with team	Export to PDF/Excel, or Teams integration

Task 2: Choose the development path

POWER PLATFORM

🛠 **Development Path (Using Power Platform)**
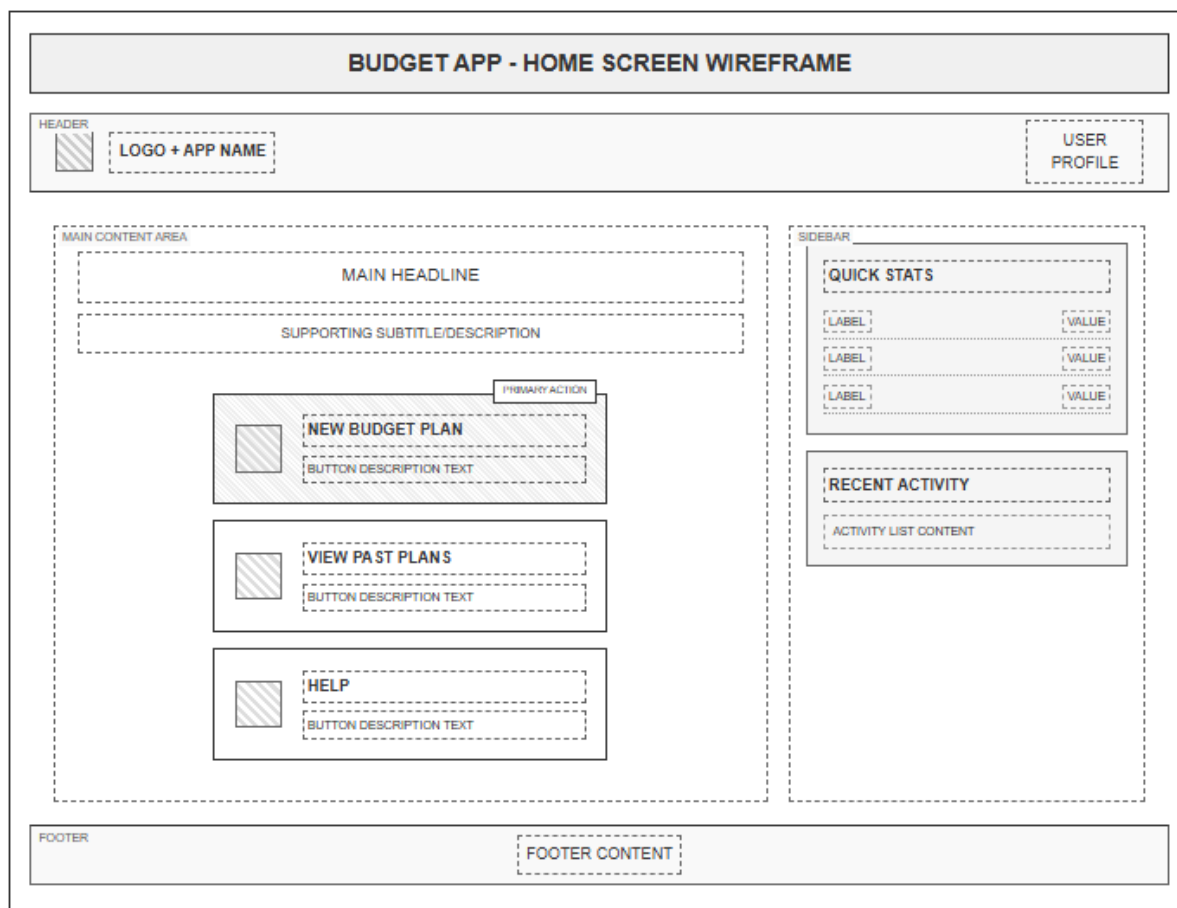
Component	Tool	Description

App UI	**Power Apps Canvas App**	Screens for data entry, plan output, settings
Workflow & AI Integration	**Power Automate + AI Builder**	Automate flow of data, trigger AI models
Data Storage	**Dataverse**	Store budgets, plans, AI outputs securely
Visualization	**Power BI Embedded in Power Apps**	Rich dashboards with drill-down insights
Document Storage	**SharePoint / OneDrive**	Uploaded receipts, quotes, past financials
Notifications	**Power Automate + Outlook/Teams**	Alerts, weekly insights, and scheduled reports

Task 3: Sketch app wireframes

App Wireframes – Canvas App Screens

1. **Home Screen**
- Buttons: "New Budget Plan", "View Past Plans", "Help"
- Navigation tiles with clean icons and branding

BUDGET APP - HOME SCREEN WIREFRAME

HEADER

LOGO + APP NAME

USER PROFILE

MAIN CONTENT AREA

MAIN HEADLINE

SUPPORTING SUBTITLE/DESCRIPTION

PRIMARY ACTION

NEW BUDGET PLAN

BUTTON DESCRIPTION TEXT

VIEW PAST PLANS

BUTTON DESCRIPTION TEXT

HELP

BUTTON DESCRIPTION TEXT

SIDEBAR

QUICK STATS

LABEL · VALUE

LABEL · VALUE

LABEL · VALUE

RECENT ACTIVITY

ACTIVITY LIST CONTENT

FOOTER

FOOTER CONTENT

2. Budget Input Screen

Fields:

- Text fields: Budget Name, Business Type
- Date Pickers: Start Date, End Date
- Currency input: Total Budget
- Dropdown: Industry
- Repeating Table: Item Name, Category, Estimated Cost, Priority
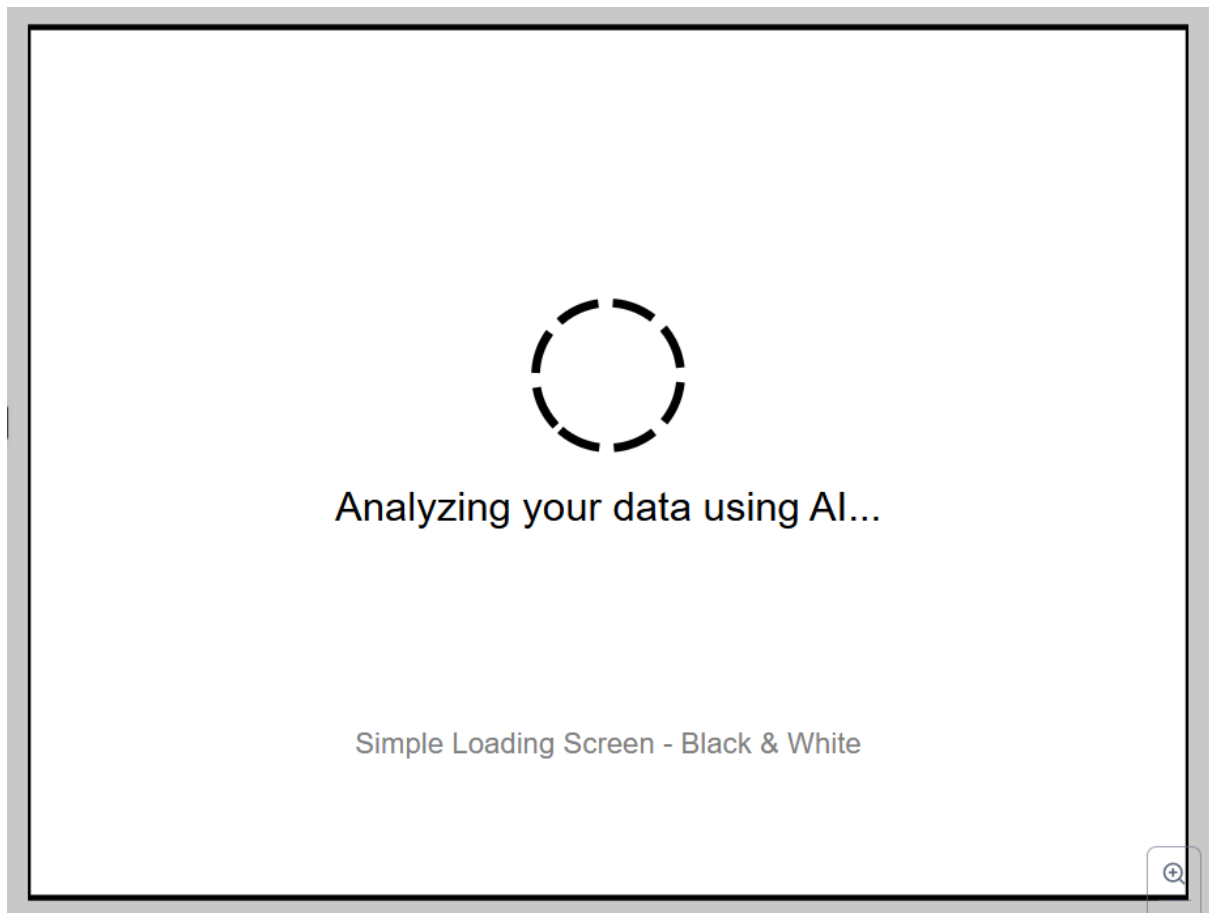- File Upload: Upload past financials/quotes
- Button: **"Submit & Analyze"**

3. Loading Screen (Optional)

- Spinner animation with "Analyzing your data using AI..."
- Timer fallback for failover
- Tips/quotes about financial planning

Analyzing your data using AI...

Simple Loading Screen - Black & White

4. AI Output Screen

Sections:

- Card 1: "Overall Risk Score" (Low/Med/High)
- Card 2: "Suggested Budget Breakdown" (Pie Chart)
- Card 3: "Recommendations" (AI-generated text)
- Card 4: "Forecast Summary" (Month-wise chart)

Buttons:

- "Download Report"
- "Simulate Changes"

- "Send Summary to Email"

AI Analysis Results
Your personalized financial insights

Overall Risk Score

MED

Risk Level Indicator

Suggested Budget Breakdown

Pie Chart

AI Recommendations

AI-Generated Text Recommendations

Forecast Summary

Jan   Feb   Mar   Apr   May   Jun
Month-wise Chart

Download Report   Simulate Changes   Send Summary to Email

AI Output Screen - Power Apps Wireframe
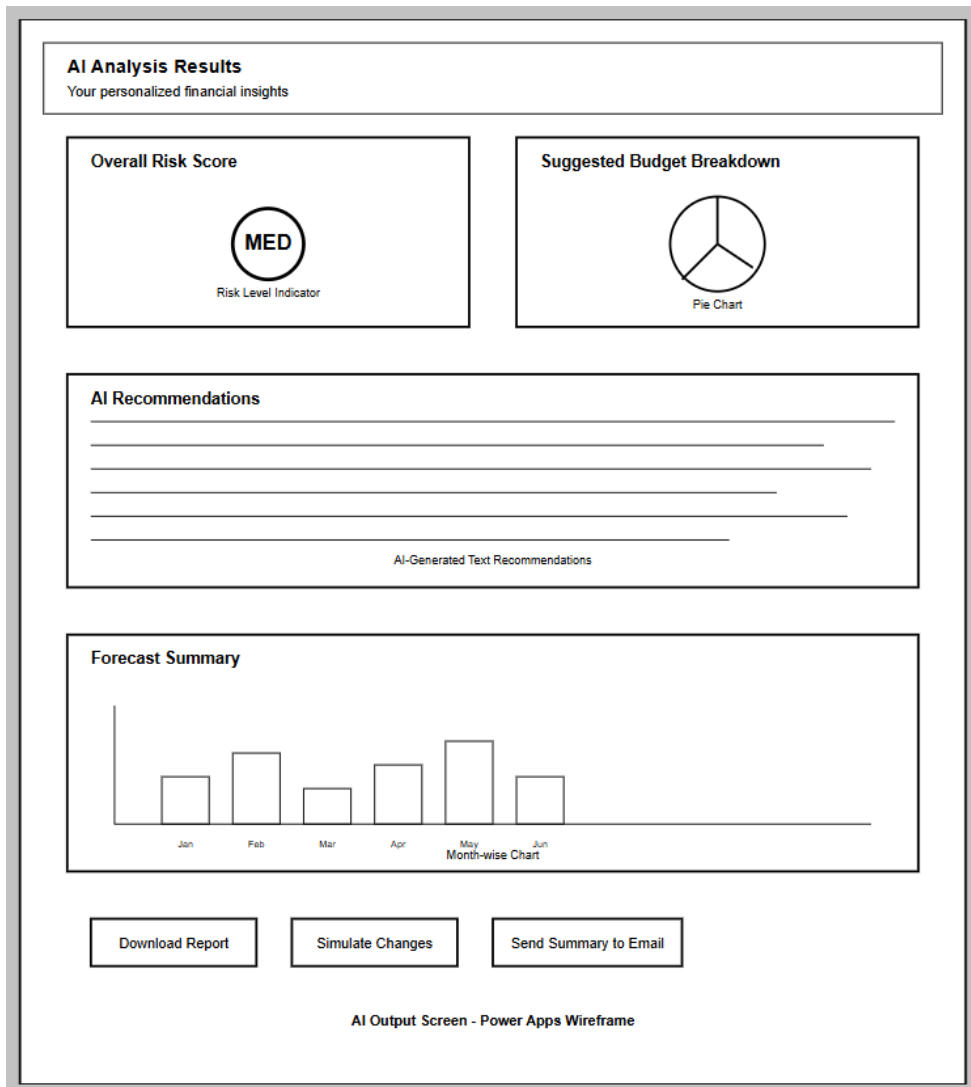
5. Interactive Dashboard Screen (Power BI Embedded)

Features:

- Month-over-month spend vs budget
- Adjustable sliders to simulate scenarios
- Toggle between categories (e.g., Ops, Marketing)
- Buttons: "Export PDF", "Reset Filters"

INTERACTIVE DASHBOARD SCREEN

RESET FILTERS | EXPORT PDF

DASHBOARD CONTROLS

TOGGLE BETWEEN CATEGORIES

ALL | OPS | MARKETING | EQUIPMENT | TRAVEL

Category filter buttons for expense breakdown

ADJUSTABLE SLIDERS - SCENARIO SIMULATION

BUDGET ALLOCATION

60%

GROWTH RATE

40%

RISK FACTOR

30%

Interactive sliders to simulate different budget scenarios

MONTH-OVER-MONTH SPEND VS BUDGET

POWER BI EMBEDDED CHART

Interactive visualization showing monthly spending compared to allocated budget
Updates dynamically based on category selection and slider adjustments

6. History & Reports Screen

- Table: Plan Name | Date | Budget | Risk Level | View/Download
- Search and filter options"Clone Plan" button to reuse input structure

HISTORY & REPORTS SCREEN

SEARCH AND FILTER OPTIONS

SEARCH PLANS

ENTER PLAN NAME...

Search by plan name or keywords

FILTER BY DATE RANGE

ALL DATES

Date range filter dropdown

FILTER BY RISK LEVEL

ALL RISK LEVELS

Risk level filter dropdown

PLAN HISTORY & REPORTS DATA TABLE

PLAN NAME	DATE	BUDGET	RISK LEVEL	VIEW/DOWNLOAD
Q1 Marketing Campaign 2024	15-JAN-2024	AED 45,000	LOW	VIEW DOWNLOAD
Equipment Upgrade Plan	08-FEB-2024	AED 75,500	MEDIUM	VIEW DOWNLOAD
Operations Expansion Q2	22-MAR-2024	AED 120,000	HIGH	VIEW DOWNLOAD
Travel & Training Budget	10-APR-2024	AED 28,750	LOW	VIEW DOWNLOAD
Digital Transformation Plan	05-MAY-2024	AED 95,200	MEDIUM	VIEW DOWNLOAD

CLONE PLAN

Button to reuse input structure from selected plan