

Complete Dashboard Content Structure

Top Navigation

- **Logo & App Name:** "FinanceFlow"
- **Global Search Placeholder:** "Search transactions, categories, accounts..."
- **Notifications** (Bell icon with badge count)
- **User Menu** (Avatar → Profile · Settings · Help · Logout)

Sidebar Menu Content (Collapsible)

1. Dashboard (Home)

Current Page Content:

- Account Summary Cards
- Monthly Budget Overview
- Cash Flow Chart
- AI Insights
- Recent Transactions
- Quick Stats

2. Accounts

Main Content:

- **Page Title:** "Financial Accounts"
- **Header Actions:** [+ Add Account] [Import from Bank]

Account List View:

- **Account Cards** (Grid Layout):
 - Account Name & Type
 - Current Balance
 - Available Balance (for credit)
 - Last Transaction Date
 - Account Status (Active/Inactive)
 - Default Account Toggle (★)

Account Detail Modal/Page:

- **Account Info Section:**
 - Account Name (Editable)
 - Account Type (Checking, Savings, Credit, Investment)
 - Bank/Institution Name
 - Account Number (Masked)
 - Opening Balance
 - Current Balance
- **Transaction History:** Last 10 transactions
- **Actions:** [Edit Details] [Set as Default] [Export Data] [Delete Account]

Empty State: "No accounts added yet. + Add your first account to start tracking"

3. Transactions







Main Content:

- **Page Title:** "All Transactions"
- **Header Actions:** [+ Add Transaction] [📷 Scan Receipt] [📁 Import CSV] [🤖 AI Assistant]

Filters & Search Bar:

- **Search:** "Search by description, amount, category..."
- **Date Range:** Custom picker + Quick filters (Today, This Week, This Month, Last 30 days)
- **Account Filter:** Dropdown with all accounts
- **Category Filter:** Multi-select dropdown
- **Amount Range:** Min/Max sliders
- **Transaction Type:** [All] [Income] [Expense] [Transfer]

Transaction Table:

Date	Description	Category	Amount	Account	Status	Actions
May 29, 25	Starbucks Coffee	Food & Dining	-₹450.00	Credit Card	Cleared	 
May 28, 25	Monthly Salary	Income	+₹50,000.00	Checking	Cleared	 
May 27, 25	Uber Ride	Transport	-₹280.00	Checking	Pending	 

Bulk Actions: [Select All] [Delete Selected] [Export Selected] [Categorize]

Pagination: "Showing 1-20 of 1,247 transactions" [Previous] [1] [2] [3] [Next]

Empty State: "No transactions found. + Add your first transaction or scan a receipt"

4. Budgets

Main Content:

- **Page Title:** "Budget Management"
- **Header Actions:** [+ Create Budget] [Budget Templates]





Monthly Budget Overview:

- **Current Month Progress:**
 - Total Budget: ₹15,000
 - Spent: ₹12,200 (81%)
 - Remaining: ₹2,800
 - Status: " ⚠ Approaching Limit"

Budget Categories List:

- **Category Budget Cards:**
 - Category Name & Icon
 - Budgeted Amount
 - Spent Amount
 - Progress Bar with %
 - Status (On Track, Over Budget, Approaching Limit)

Example Budget Categories:

Category	Budget	Spent	Remaining	Status
 Food & Dining	₹4,000	₹3,400	₹600	On Track
 Transport	₹2,000	₹2,200	-₹200	Over Budget
 Utilities	₹1,500	₹1,200	₹300	On Track
 Entertainment	₹1,000	₹950	₹50	Approaching Limit

Budget History: Previous months comparison **Recurring Budgets:** Setup for automatic monthly/yearly budgets

5. Reports

Main Content:

- **Page Title:** "Financial Reports"
- **Header Actions:** [ Email Report] [ Custom Report] [ Export PDF]

Report Dashboard:

- **Quick Reports Section:**
 - Monthly Summary
 - Category Breakdown
 - Income vs Expense Trends
 - Account Performance
 - Budget vs Actual

Report Cards:

- **Monthly Financial Summary:**
 - Total Income
 - Total Expenses
 - Net Savings
 - Savings Rate %
 - Top Spending Categories
- **Category Analysis:**
 - Spending by Category (Pie/Bar Chart)
 - Month-over-Month Comparison
 - Category Trends
- **Cash Flow Report:**
 - Income Trends (Line Chart)
 - Expense Trends (Line Chart)
 - Net Cash Flow
 - Seasonal Patterns

Time Period Selector: [This Month] [Last 3 Months] [Last 6 Months] [This Year] [Custom Range]

Export Options: [PDF] [Excel] [CSV] [Email Report]

6. AI Insights





Main Content:

- **Page Title:** "AI Financial Insights"
- **Header Actions:** [ Ask AI] [ Insight Settings]

AI Chat Interface:

- **Chat Input:** "Ask about your spending, budgets, or get financial advice..."
- **Quick Prompts:**
 - "How am I doing with my budget this month?"
 - "What are my top spending categories?"
 - "Show me unusual transactions"
 - "Give me saving tips"

Insights Dashboard:

- **Smart Observations:**
 - " Dining out increased 15% vs last month"
 - " Your utility bills are consistent - great budgeting!"
 - " Weekend grocery shopping saves you 12% on average"
 - " Consider carpooling - transport costs up 20%"
- **Spending Patterns:**
 - Peak spending days/times
 - Seasonal trends
 - Unusual transaction alerts
 - Recurring payment reminders
- **Recommendations:**
 - Budget adjustments
 - Saving opportunities
 - Bill optimization
 - Investment suggestions

Natural Language Processing:

- **Voice Input:** "Add ₹500 spent on groceries at Big Bazaar"
- **Text Input:** "Coffee at cafe central 250 rupees"

- **Smart Categorization:** Auto-categorize based on description

7. Settings

Main Content:

- **Page Title:** "Settings & Preferences"

Settings Sections:

A. Profile Settings:

- Personal Information (Name, Email, Phone)
- Profile Picture
- Timezone & Language
- Currency Preferences

B. Account Preferences:

- Default Account
- Transaction Categories (Add/Edit/Delete)
- Auto-categorization Rules
- Recurring Transaction Templates

C. Budget & Notifications:

- Budget Alert Thresholds (80%, 90%, 100%)
- Email Notifications Toggle
- Push Notifications
- Weekly/Monthly Report Schedule

D. Security & Privacy:

- Change Password
- Two-Factor Authentication
- Data Export/Backup
- Account Deletion

E. App Preferences:

- Theme (Light/Dark/Auto)

- Dashboard Layout
- Chart Preferences
- Date Format
- Number Format

F. Integrations:







- Bank Account Linking
- Receipt Scanning Settings
- AI Assistant Preferences
- Export/Import Settings

G. Data Management:

- Backup & Restore
- Data Export (PDF, Excel, CSV)
- Clear Transaction History
- Reset Categories

Quick Add Floating Menu

Options:

-  Add Income
-  Add Expense
-  Add Transfer
-  Scan Receipt
-  Voice Entry
-  Bulk Entry

Global Components

Search Results Overlay

Content Types:

- Transactions matching query
- Categories
- Accounts

- Recent searches
- Suggested actions

Notification Drawer

Categories:

- Budget Alerts
- Bill Reminders
- Unusual Activity
- AI Insights
- System Updates

Sample Notifications:

- "🔔 Travel budget at 85% (₹850 remaining)"
- "📅 Electricity bill recurring tomorrow (₹1,200)"
- "🤖 New AI insight: You can save ₹500/month on dining"
- "★ Monthly report ready for download"

Mobile-Specific Adaptations

Mobile Navigation

- **Bottom Tab Bar:** Dashboard, Transactions, Add, Budgets, More
- **Hamburger Menu:** Full sidebar collapsed into drawer
- **Swipe Gestures:** Swipe between account cards, delete transactions

Mobile Transaction Entry

- **Camera Integration:** Direct receipt scanning
- **Location Services:** Auto-detect merchant names
- **Quick Categories:** Swipeable category selection
- **Voice Input:** Speech-to-text for quick entry

Error States & Empty States

Empty States:

- **No Transactions:** "Start tracking by adding your first transaction"

- **No Accounts:** "Add your first account to begin"
- **No Budgets:** "Create your first budget to stay on track"
- **No Data for Charts:** "Add some transactions to see insights"

Error States:

- **Network Error:** "Connection lost. Trying to reconnect..."
- **Sync Error:** "Some changes couldn't be saved. Retry?"
- **Import Error:** "File format not supported. Try CSV or PDF"

Loading States

- **Skeleton Screens:** For dashboard cards, transaction lists
- **Progressive Loading:** Load critical data first
- **Background Sync:** "Syncing latest transactions..."

This comprehensive content structure provides the exact copy, labels, and microcopy for every section of your expense tracking dashboard.