

Financial Playbook - Final UI Implementation Plan

Date: November 24, 2025

Purpose: Definitive UI design reference selections with specific element assignments

Confidence Level: 90-95% implementation success

My Final Designer Selections

After analyzing both lists and my capabilities, here are the **4 designers/agencies** I will use as primary references:

Primary Foundation (95% confidence)

1. **Octet** - Design system architecture and component consistency
2. **Ran Liu** - Clean hierarchy and layout structure

Financial Specifics (90% confidence)

1. **Ana Vadillo** - Financial data tables and dense information display

Dashboard & Visualization (88% confidence)

1. **Fuselab Creative** - Customizable dashboard and data visualization

Polish Layer (selective, 92% confidence)

1. **Lazarev** - Professional fintech aesthetic and empty states
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UI Element Breakdown by Designer

Here's exactly which designer I'll reference for each specific UI element in Financial Playbook:

Login & Authentication Page [QC: 101-109]

Primary Reference: Lazarev

Secondary Reference: Ran Liu

Why:

- Lazarev: Professional fintech credibility, clean onboarding flows
- Ran Liu: Simple, uncluttered layout

Specific Elements:

- [101] Logo placement → Lazarev (centered, prominent)
- [102] “Sign in with Google” button → Lazarev (large, clear CTA)
- [103] Welcome message → Ran Liu (clean typography, minimal)
- [104] Background → Lazarev (subtle gradient or solid professional color)
- [105] Footer links → Ran Liu (simple, understated)

Implementation:

- Clean, centered layout
- Single prominent CTA button
- Minimal distractions
- Professional color palette (blues/grays)
- Simple fade-in animation

Global Navigation & Header [QC: 201-208]

Primary Reference: Octet

Secondary Reference: Ran Liu

Why:

- Octet: Consistent navigation patterns across complex apps
- Ran Liu: Clean, system-like layout grids

Specific Elements:

- [201] App logo → Octet (consistent placement, clickable home)
- [202] Main navigation menu → Octet (clear hierarchy, consistent spacing)
- [203] User profile dropdown → Octet (standard pattern, accessible)
- [204] Notifications bell → Octet (badge for count, dropdown)
- [205] QuickBooks sync status → **Ana Vadillo** (financial data indicator)
- [206] Last synced timestamp → Ana Vadillo (subtle, informative)
- [207] Search bar → Ran Liu (clean, minimal, expandable)
- [208] Settings gear icon → Octet (standard placement)

Implementation:

- Persistent top navigation bar
 - Left: Logo + main nav items
 - Right: Search, notifications, sync status, profile
 - Sticky on scroll
 - Consistent across all pages
 - shadcn/ui Navigation Menu component
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Dashboard (Customizable) [QC: 209-220]

Primary Reference: Fuselab Creative

Secondary Reference: Ran Liu

Why:

- Fuselab: Dashboard and widget specialization
- Ran Liu: Clean hierarchy (one primary chart per view)

Specific Elements:

- [209] Dashboard title → Ran Liu (clear, prominent)
- [210] “Customize Layout” button → Fuselab (widget management)
- [211] Widget grid container → Fuselab (drag-and-drop grid)
- [212] Active Alerts widget → **Ana Vadillo** (financial alerts with severity)
- [213] Cash Flow Chart widget → Fuselab (primary chart, prominent)
- [214] Quick Stats widget → Ran Liu (clean cards with numbers)
- [215] Upcoming Bills widget → Ana Vadillo (financial table, compact)
- [216] Account Balances widget → Ana Vadillo (financial data, clear hierarchy)
- [217] Recent Activity widget → Ana Vadillo (transaction list, scannable)
- [218] Scenario Status widget → Ran Liu (status cards, simple)
- [219] Calendar Preview widget → Fuselab (compact calendar with events)
- [220] QuickBooks Sync Status widget → Ana Vadillo (sync indicator with details)

Implementation:

- React Grid Layout for drag-and-drop
- 12-column responsive grid
- Each widget = Card component from shadcn/ui
- Resize handles on widgets
- “Lock Layout” toggle
- Layout persistence in database
- Mobile: Stacks vertically

Visual Status System (Traffic Light):

-  GREEN glow → Subtle box-shadow with green hue
 -  YELLOW glow → Box-shadow with yellow/amber hue + warning icon
 -  RED glow → Box-shadow with red hue + alert icon + optional pulse
 - Info bubble () → Tooltip on hover, modal on click
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Accounts Management Page [QC: 301-329]

Primary Reference: Ana Vadillo

Secondary Reference: Ran Liu

Why:

- Ana Vadillo: Financial data tables, dense information, clear hierarchy
- Ran Liu: Clean layout structure

Specific Elements:

Header Section:

- [301] Page title “Accounts” → Ran Liu (clear hierarchy)
- [302] “Sync Now” button → Ana Vadillo (financial action, prominent)
- [303] Last synced timestamp → Ana Vadillo (subtle, informative)
- [304] Filter dropdown → Ana Vadillo (financial data filtering)

Bank Accounts Section:

- [305] Section title “Bank Accounts” → Ran Liu (clear section break)
- [306] Account list table → **Ana Vadillo** (finance-grade table)
 - [307] Account name column → Ana Vadillo (bold, primary)
 - [308] Account type column → Ana Vadillo (secondary info)
 - [309] Current balance column → Ana Vadillo (prominent, right-aligned)
 - [310] Status indicator → **Custom** (traffic light glow)
 - [311] “View in QuickBooks” link → Ana Vadillo (external link pattern)

Bills Section:

- [312] Section title “Bills” → Ran Liu
- [313] Bills table → Ana Vadillo
 - [314] Bill name column → Ana Vadillo
 - [315] Vendor column → Ana Vadillo
 - [316] Amount column → Ana Vadillo (right-aligned, bold)
 - [317] Due date column → Ana Vadillo (date formatting)

- [318] Status indicator → Custom (traffic light)
- [319] “View in QuickBooks” link → Ana Vadillo

Accounts Receivable Section:

- [320] Section title “Accounts Receivable” → Ran Liu
- [321] AR table → Ana Vadillo
 - [322] Invoice number → Ana Vadillo
 - [323] Customer → Ana Vadillo
 - [324] Amount → Ana Vadillo
 - [325] Due date → Ana Vadillo
 - [326] Status → Custom (traffic light)
 - [327] “View in QuickBooks” link → Ana Vadillo

Empty States:

- [328] No accounts message → **Lazarev** (friendly empty state)
- [329] “Connect QuickBooks” CTA → Lazarev (clear action)

Implementation:

- shadcn/ui Table component
 - Sortable columns
 - Filter by status (green/yellow/red)
 - Search functionality
 - Responsive: Cards on mobile
 - Read-only (no edit/delete buttons)
 - “View in QuickBooks” opens new tab
-

🎯 Scenario Planning Page [QC: 401-425]

Primary Reference: Ran Liu

Secondary Reference: Lazarev

Why:

- Ran Liu: Clean hierarchy for complex workflows
- Lazarev: Scenario management patterns from their SaaS work

Specific Elements:

Header:

- [401] Page title “Scenario Planning” → Ran Liu
- [402] “Create New Scenario” button → Lazarev (primary CTA)
- [403] View toggle (Grid/List) → Ran Liu (simple toggle)

Scenario Cards:

- [404] Scenario card container → Lazarev (card-based layout)
 - [405] Scenario name → Ran Liu (bold, clear)
 - [406] Status badge (Active/Draft/Locked) → Octet (consistent badges)
 - [407] Created date → Ran Liu (subtle metadata)
 - [408] Quick stats (Cash flow, Risk level) → Ran Liu (compact metrics)
 - [409] Status indicator → Custom (traffic light glow on card border)
 - [410] “Edit” button → Octet (secondary action)
 - [411] “View Report” button → Octet (primary action)
 - [412] “Lock Scenario” toggle → Octet (toggle switch)
 - [413] “Duplicate” button → Octet (tertiary action)
 - [414] “Delete” button → Octet (destructive action, confirm modal)

Comparison View:

- [415] “Compare Scenarios” button → Lazarev
- [416] Scenario selector (multi-select) → Octet
- [417] Side-by-side comparison table → **Ana Vadillo** (financial comparison)
 - [418] Metric rows → Ana Vadillo
 - [419] Scenario columns → Ana Vadillo
 - [420] Difference indicators → Custom (green/red delta)

Empty State:

- [421] No scenarios message → Lazarev
- [422] “Start with AI Strategy Builder” CTA → Lazarev

Filters:

- [423] Filter by status → Octet
- [424] Sort by (Date, Name, Risk) → Octet
- [425] Search scenarios → Ran Liu

Implementation:

- Card grid layout (3 columns desktop, 1 mobile)
 - shadcn/ui Card, Badge, Button components
 - Comparison view = shadcn/ui Table
 - Delete confirmation = shadcn/ui Alert Dialog
 - Drag to reorder (optional)
-

Scenario Editor / Logic Builder [QC: 501-526]

Primary Reference: Octet

Secondary Reference: Ran Liu

Why:

- Octet: Complex flows, interaction patterns
- Ran Liu: Clean hierarchy for dense interfaces

Specific Elements:

Header:

- [501] Scenario name (editable) → Octet (inline edit)
- [502] Save button → Octet (primary action)
- [503] “Back to Scenarios” link → Octet (breadcrumb)
- [504] Status badge → Octet

Left Sidebar (Inputs):

- [505] “Starting Conditions” section → Ran Liu (clear section)
 - [506] Account balances (from QuickBooks) → Ana Vadillo (read-only, financial)
 - [507] Date range selector → Octet (date picker)
 - [508] “Refresh from QuickBooks” button → Ana Vadillo

Center Panel (Logic Rules):

- [509] “Business Rules” section → Octet
 - [510] Rule list → Octet (sortable, draggable)
 - [511] “Add Rule” button → Octet
 - [512] Rule card → Octet
 - [513] IF condition dropdown → Octet (select)
 - [514] Comparison operator → Octet (select: <, >, =, etc.)
 - [515] Value input → Octet (number/text input)
 - [516] THEN action dropdown → Octet (select)
 - [517] Action details → Octet (conditional inputs)
 - [518] “Delete Rule” button → Octet (icon button)
 - [519] Status indicator → Custom (validation: green = valid, red = error)

Right Sidebar (Preview):

- [520] “Cash Flow Preview” section → Fuselab
 - [521] Mini chart → Fuselab (line chart, simplified)
 - [522] Risk indicators → Custom (traffic light badges)
 - [523] “Run Full Simulation” button → Lazarev (CTA)

Bottom Panel (Timeline):

- [524] “Event Timeline” → Fuselab (horizontal timeline)
 - [525] Event markers → Fuselab (dots on timeline)
 - [526] Event details on hover → Fuselab (tooltip)

Implementation:

- Three-column layout (sidebar-main-sidebar)

- Rule builder = Form with shadcn/ui Select, Input components
 - Drag-and-drop rules with react-beautiful-dnd
 - Real-time validation
 - Preview chart = Chart.js line chart
 - Timeline = custom component with CSS
-

AI Strategy Builder Wizard [QC: 601-651]

Primary Reference: Lazarev

Secondary Reference: Octet

Why:

- Lazarev: Onboarding flows, wizard patterns
- Octet: Form patterns, multi-step flows

Specific Elements:

Step 1: Upload Documents [601-610]:

- [601] Wizard progress indicator → Lazarev (step dots)
- [602] Step title “Upload Financial Documents” → Lazarev
- [603] Step description → Lazarev (helpful copy)
- [604] File upload dropzone → Octet (drag-and-drop area)
- [605] File list → Octet (uploaded files with remove button)
- [606] Supported formats note → Ran Liu (subtle helper text)
- [607] “Next” button → Lazarev (primary CTA)
- [608] “Cancel” button → Octet (secondary)
- [609] Upload progress bar → Octet (linear progress)
- [610] Error message → Octet (alert component)

Step 2: AI Analysis [611-620]:

- [611] Step title “Analyzing Documents” → Lazarev
- [612] Loading animation → Lazarev (spinner or skeleton)

- [613] Progress text “Extracting transactions...” → Lazarev
- [614] Analysis results card → Ran Liu (clean summary)
 - [615] Detected income → Ana Vadillo (financial metric)
 - [616] Detected expenses → Ana Vadillo
 - [617] Average monthly cash flow → Ana Vadillo
 - [618] Number of transactions → Ana Vadillo
- [619] “Looks good” button → Lazarev
- [620] “Re-analyze” button → Octet (secondary)

Step 3: Verification [621-635]:

- [621] Step title “Verify Extracted Data” → Lazarev
- [622] Verification table → **Ana Vadillo** (financial data table)
 - [623] Transaction date → Ana Vadillo
 - [624] Description → Ana Vadillo
 - [625] Amount → Ana Vadillo (bold, right-aligned)
 - [626] Category → Ana Vadillo
 - [627] Confidence score → Custom (green/yellow/red indicator)
 - [628] Edit icon → Octet (inline edit)
- [629] “Approve All” button → Lazarev
- [630] “Edit Selected” button → Octet
- [631] Filter by confidence → Octet
- [632] Search transactions → Ran Liu
- [633] Pagination → Octet
- [634] “Next” button → Lazarev
- [635] “Back” button → Octet

Step 4: AI Recommendations [636-645]:

- [636] Step title “Recommended Strategies” → Lazarev
- [637] Recommendation cards → Lazarev (card-based selection)
 - [638] Strategy name → Lazarev (bold, clear)

- [639] Strategy description → Lazarev (concise copy)
- [640] Key benefits list → Lazarev (bullet points)
- [641] Risk level badge → Custom (green/yellow/red)
- [642] “Select This Strategy” radio → Octet
- [643] “Create Scenario” button → Lazarev (primary CTA)
- [644] “Customize” button → Octet (secondary)
- [645] “Back” button → Octet

Step 5: Completion [646-651]:

- [646] Success icon → Lazarev (checkmark animation)
- [647] Success message → Lazarev (celebratory copy)
- [648] Scenario summary → Ran Liu (clean card)
- [649] “View Scenario” button → Lazarev (primary CTA)
- [650] “Create Another” button → Octet (secondary)
- [651] “Go to Dashboard” link → Octet (tertiary)

Implementation:

- Multi-step wizard with shadcn/ui Stepper pattern
 - File upload with react-dropzone
 - AI analysis with loading states
 - Table with shadcn/ui Table component
 - Cards with shadcn/ui Card component
 - Form validation with Zod
 - Success animation with simple CSS
-

Playbook Report View [QC: 701-744]

Primary Reference: Ana Vadillo

Secondary Reference: Fuselab Creative

Why:

- Ana Vadillo: Financial reporting, dense data display
- Fuselab: Data visualization, charts

Specific Elements:

Header:

- [701] Report title → Ran Liu (clear, prominent)
- [702] Scenario name → Ran Liu (subtitle)
- [703] Date range → Ran Liu (metadata)
- [704] “Export PDF” button → Octet (secondary action)
- [705] “Share” button → Octet (secondary action)
- [706] “Back to Scenarios” link → Octet (breadcrumb)

Executive Summary Section:

- [707] Section title “Executive Summary” → Ran Liu
- [708] Summary cards → Ran Liu (metric cards)
 - [709] Starting cash → Ana Vadillo (financial metric)
 - [710] Ending cash → Ana Vadillo
 - [711] Net change → Ana Vadillo (with delta indicator)
 - [712] Risk level → Custom (traffic light badge)

Cash Flow Chart Section:

- [713] Section title “Cash Flow Projection” → Ran Liu
- [714] Chart container → **Fuselab** (primary visualization)
 - [715] Line chart → Fuselab (Chart.js line chart)
 - [716] Legend → Fuselab (chart legend)
 - [717] Axis labels → Fuselab (clear labeling)
 - [718] Tooltip on hover → Fuselab (data point details)
- [719] Chart controls → Fuselab (zoom, pan, reset)

Risk Analysis Section:

- [720] Section title “Risk Analysis” → Ran Liu

- [721] Risk table → Ana Vadillo (financial risk table)
 - [722] Risk description → Ana Vadillo
 - [723] Severity → Custom (traffic light indicator)
 - [724] Date detected → Ana Vadillo
 - [725] Recommended action → Ana Vadillo
 - [726] Status → Custom (resolved/active badge)

Transaction Register Section:

- [727] Section title “Detailed Register” → Ran Liu
- [728] Register table → **Ana Vadillo** (finance-grade table)
 - [729] Date → Ana Vadillo
 - [730] Description → Ana Vadillo
 - [731] Category → Ana Vadillo
 - [732] Debit → Ana Vadillo (red, right-aligned)
 - [733] Credit → Ana Vadillo (green, right-aligned)
 - [734] Balance → Ana Vadillo (bold, right-aligned)
 - [735] Source → Ana Vadillo (QuickBooks/Manual badge)
 - [736] Status → Custom (traffic light)
- [737] Filter by category → Octet
- [738] Search transactions → Ran Liu
- [739] Pagination → Octet

AI Insights Section:

- [740] Section title “AI Insights & Recommendations” → Lazarev
- [741] Insight cards → Lazarev (card-based layout)
 - [742] Insight text → Lazarev (readable copy)
 - [743] Confidence score → Custom (percentage with color)
 - [744] “Apply Recommendation” button → Lazarev (CTA)

Implementation:

- Long-form report layout

- Print-friendly CSS
 - Charts with Chart.js
 - Tables with shadcn/ui Table
 - Export PDF with html2pdf.js or similar
 - Responsive: Stacks on mobile
 - Sticky table of contents sidebar (desktop)
-

Settings & Notifications [QC: 801-823]

Primary Reference: Octet

Secondary Reference: Ran Liu

Why:

- Octet: Settings patterns, form-heavy pages
- Ran Liu: Clean, organized layout

Specific Elements:

Sidebar Navigation:

- [801] Settings sidebar → Octet (vertical tab navigation)
 - [802] General tab → Octet
 - [803] QuickBooks Connector tab → Octet
 - [804] Notifications tab → Octet
 - [805] Audit Trail tab → Octet
 - [806] QC Numbers tab → Octet (dev mode)

General Settings:

- [807] Section title “General Settings” → Ran Liu
- [808] App title input → Octet (text input)
- [809] Theme toggle (Light/Dark) → Octet (switch)
- [810] Language selector → Octet (select dropdown)
- [811] “Save Changes” button → Octet (primary action)

QuickBooks Connector:

- [812] Section title “QuickBooks Connector” → Ran Liu
- [813] Connection status → **Ana Vadillo** (financial integration status)
- [814] “Connect QuickBooks” button → Lazarev (primary CTA if not connected)
- [815] “Disconnect” button → Octet (destructive action if connected)
- [816] Sync frequency selector → Octet (radio group: 1h, 4h, 8h, 24h)
- [817] “Sync on Login” toggle → Octet (switch)
- [818] Last synced timestamp → Ana Vadillo

Notifications:

- [819] Section title “Notification Settings” → Ran Liu
- [820] Notification preferences → Octet (checkbox list)
 - Email on new risk detected
 - Email on overdue task
 - Email on sync failure
 - Email on scenario completion
- [821] Overdue threshold input → Octet (number input with unit)
- [822] “Save Preferences” button → Octet

QC Numbers (Dev Mode):

- [823] “Show QC Numbers” toggle → Octet (switch)

Implementation:

- Two-column layout (sidebar + content)
 - shadcn/ui Tabs for navigation
 - Forms with shadcn/ui Form components
 - Toggle switches with shadcn/ui Switch
 - Save confirmation toast
 - Validation with Zod
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Audit Trail Report [QC: 901-920]

Primary Reference: Ana Vadillo

Secondary Reference: Fuselab Creative

Why:

- Ana Vadillo: Dense data tables, financial logging
- Fuselab: Timeline visualization

Specific Elements:

Header:

- [901] Page title “Audit Trail” → Ran Liu
- [902] Date range filter → Octet (date range picker)
- [903] User filter → Octet (select dropdown)
- [904] Action type filter → Octet (multi-select)
- [905] “Export CSV” button → Octet (secondary action)
- [906] “Clear Filters” button → Octet (tertiary)

Audit Log Table:

- [907] Audit table → **Ana Vadillo** (detailed log table)
 - [908] Timestamp → Ana Vadillo (precise date/time)
 - [909] User → Ana Vadillo (name + role)
 - [910] Action → Ana Vadillo (bold, clear)
 - [911] Entity → Ana Vadillo (what was changed)
 - [912] Before value → Ana Vadillo (strikethrough if changed)
 - [913] After value → Ana Vadillo (highlighted if changed)
 - [914] IP address → Ana Vadillo (security metadata)
 - [915] “View Details” button → Octet (expands row)

Timeline View:

- [916] “Switch to Timeline” toggle → Octet
- [917] Timeline container → **Fuselab** (vertical timeline)

- [918] Event markers → Fuselab (dots on timeline)
- [919] Event cards → Fuselab (card with details)
- [920] Time axis → Fuselab (date labels)

Implementation:

- shadcn/ui Table with expandable rows
 - Filter bar with shadcn/ui components
 - Timeline with custom CSS (vertical line + cards)
 - Pagination for large datasets
 - Export to CSV with papaparse or similar
 - Search functionality
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Feature Request System [QC: 1001-1050]

Primary Reference: Lazarev

Secondary Reference: Octet

Why:

- Lazarev: User engagement patterns, feedback flows
- Octet: Form patterns, voting UI

Specific Elements:

Feature Request List:

- [1001] Page title “Feature Requests” → Ran Liu
- [1002] “Submit New Request” button → Lazarev (primary CTA)
- [1003] Filter by status → Octet (tabs: All, Submitted, Planned, In Progress, Completed)
- [1004] Sort by → Octet (dropdown: Votes, Date, Status)
- [1005] Search requests → Ran Liu

Request Cards:

- [1006] Request card → Lazarev (card-based layout)

- [1007] Request title → Lazarev (bold, clickable)
- [1008] Status badge → Octet (color-coded)
- [1009] Vote count → Octet (number with up arrow)
- [1010] “Upvote” button → Octet (toggle button)
- [1011] Category tag → Octet (badge)
- [1012] Submitted by → Ran Liu (user name + date)
- [1013] Comment count → Octet (icon + number)
- [1014] “View Details” link → Lazarev

Request Detail Modal:

- [1015] Modal container → Octet (dialog)
 - [1016] Request title → Lazarev
 - [1017] Status badge → Octet
 - [1018] Full description → Lazarev (formatted text)
 - [1019] Attachments → Octet (file list)
 - [1020] Vote button → Octet (prominent)
 - [1021] Comment section → Octet (threaded comments)
 - [1022] “Add Comment” form → Octet (textarea + button)
 - [1023] “Close” button → Octet

Submit Request Form:

- [1024] Form modal → Octet
 - [1025] Title input → Octet (text input)
 - [1026] Description textarea → Octet (rich text)
 - [1027] Category selector → Octet (select)
 - [1028] Attachment upload → Octet (file upload)
 - [1029] “Submit Request” button → Lazarev (primary CTA)
 - [1030] “Cancel” button → Octet

Admin Dashboard (Owner Only):

- [1031] “Admin View” toggle → Octet

- [1032] Admin table → Ana Vadillo (detailed table)
 - [1033] Request title → Ana Vadillo
 - [1034] Votes → Ana Vadillo (sortable)
 - [1035] Status dropdown → Octet (change status)
 - [1036] Assigned to → Octet (user selector)
 - [1037] Priority → Octet (select: Low, Medium, High)
 - [1038] “Merge” button → Octet (merge duplicates)
 - [1039] “Delete” button → Octet (destructive)

Roadmap View:

- [1040] “View Roadmap” link → Lazarev
- [1041] Roadmap timeline → Fuselab (horizontal quarters)
 - [1042] Q1 2026 column → Fuselab
 - [1043] Q2 2026 column → Fuselab
 - [1044] Q3 2026 column → Fuselab
 - [1045] Q4 2026 column → Fuselab
 - [1046] Feature cards in columns → Lazarev (draggable)
- [1047] “Public Roadmap” toggle → Octet (show/hide from users)

Analytics (Admin):

- [1048] Analytics dashboard → Fuselab
 - [1049] Top requested categories chart → Fuselab (bar chart)
 - [1050] Request trend chart → Fuselab (line chart)

Implementation:

- Card grid layout
- shadcn/ui Dialog for modals
- shadcn/ui Form for submission
- Voting with optimistic updates
- Comments with threaded replies
- Admin table with inline editing

- Roadmap with drag-and-drop (react-beautiful-dnd)
 - Charts with Chart.js
-

Calendar View [QC: 1051-1070]

Primary Reference: Fuselab Creative

Secondary Reference: Octet

Why:

- Fuselab: Calendar and timeline visualization
- Octet: Event management patterns

Specific Elements:

Header:

- [1051] Page title “Calendar” → Ran Liu
- [1052] View toggle (Month/Week/Day) → Octet (button group)
- [1053] Today button → Octet (quick navigation)
- [1054] Date navigation (prev/next) → Octet (arrow buttons)
- [1055] Current date display → Ran Liu (prominent)
- [1056] “Sync with Google Calendar” button → Lazarev (integration CTA)

Calendar Grid:

- [1057] Calendar container → **Fuselab** (calendar grid)
 - [1058] Day cells → Fuselab (grid cells)
 - [1059] Event markers → Fuselab (colored dots or bars)
 - [1060] Event titles → Fuselab (truncated text)
 - [1061] Status colors → Custom (green/yellow/red matching traffic light)
 - [1062] “More events” link → Fuselab (if overflow)

Event Detail Popover:

- [1063] Event popover → Octet (popover component)
 - [1064] Event title → Lazarev

- [1065] Event type badge → Octet (Bill, Payment, Task, etc.)
- [1066] Date/time → Ran Liu
- [1067] Status indicator → Custom (traffic light)
- [1068] Description → Lazarev
- [1069] “View in QuickBooks” link → Ana Vadillo (if applicable)
- [1070] “Mark Complete” button → Octet (if task)

Implementation:

- Calendar with react-big-calendar or custom component
 - Event colors match traffic light system
 - Click event to open popover
 - Google Calendar two-way sync via API
 - Responsive: List view on mobile
 - Filter by event type
-

Design System Foundation

Typography (Ran Liu + Octet)

Font Stack:

```
font-family: 'Inter', -apple-system, BlinkMacSystemFont, 'Segoe UI', sans-serif;
```

Scale:

- Display: 2.5rem (40px) - Page titles
- Heading 1: 2rem (32px) - Section titles
- Heading 2: 1.5rem (24px) - Subsection titles
- Heading 3: 1.25rem (20px) - Card titles
- Body: 1rem (16px) - Default text

- Small: 0.875rem (14px) - Metadata, captions
- Tiny: 0.75rem (12px) - Labels, badges

Weights:

- Bold (700) - Primary headings, important numbers
- Semibold (600) - Secondary headings, table headers
- Medium (500) - Buttons, labels
- Regular (400) - Body text

Color Palette (Ana Vadillo + Ran Liu)

Base Colors:

```

/* Neutrals (Ran Liu - calm palette) */
--background: 0 0% 100%;           /* White */
--foreground: 222 47% 11%;         /* Near black */
--muted: 210 40% 96%;            /* Light gray */
--muted-foreground: 215 16% 47%;  /* Medium gray */
--border: 214 32% 91%;          /* Border gray */

/* Primary (Ana Vadillo - financial blue) */
--primary: 221 83% 53%;          /* Professional blue */
--primary-foreground: 210 40% 98%; /* White text on blue */

/* Status Colors (Traffic Light System) */
--success: 142 76% 36%;          /* Green - In sync */
--warning: 38 92% 50%;           /* Amber - Warning */
--destructive: 0 84% 60%;         /* Red - Critical */

/* Financial Colors (Ana Vadillo) */
--credit: 142 76% 36%;           /* Green for income/credits */
--debit: 0 84% 60%;              /* Red for expenses/debits */

```

Traffic Light Glows:

```
/* Green glow */
box-shadow: 0 0 0 3px rgba(34, 197, 94, 0.2);

/* Yellow glow */
box-shadow: 0 0 0 3px rgba(251, 191, 36, 0.3);

/* Red glow (with pulse) */
box-shadow: 0 0 0 3px rgba(239, 68, 68, 0.3);
animation: pulse 2s cubic-bezier(0.4, 0, 0.6, 1) infinite;
```

Spacing (Octet + Ran Liu)

Scale (Tailwind default):

- 0.5 = 0.125rem (2px)
- 1 = 0.25rem (4px)
- 2 = 0.5rem (8px)
- 3 = 0.75rem (12px)
- 4 = 1rem (16px)
- 6 = 1.5rem (24px)
- 8 = 2rem (32px)
- 12 = 3rem (48px)
- 16 = 4rem (64px)

Component Spacing:

- Card padding: 6 (24px)
- Section spacing: 12 (48px)
- Element spacing: 4 (16px)
- Button padding: 4 horizontal, 2 vertical

Components (shadcn/ui + Custom)

From shadcn/ui:

- Button (with variants: default, secondary, outline, ghost, destructive)
- Card (with header, content, footer)
- Table (with sorting, filtering)
- Form (with validation)
- Dialog / Modal
- Dropdown Menu
- Select
- Input
- Textarea
- Switch / Toggle
- Badge
- Alert
- Tooltip
- Tabs
- Popover
- Sheet (sidebar)

Custom Components:

- Traffic Light Status Indicator
 - Widget Container (for dashboard)
 - Chart Wrapper (for data viz)
 - Timeline Component
 - Calendar Component
 - File Upload Dropzone
-



UI Flow Summary

User Journey with Designer References

1. Login (Lazarev)

- Clean, professional entry point
- Single Google OAuth button
- Minimal distractions

2. Dashboard (Fuselab + Ran Liu)

- Customizable widget grid
- One primary chart (cash flow)
- Traffic light status indicators throughout
- Quick access to all features

3. Accounts Management (Ana Vadillo)

- Finance-grade tables
- Clear hierarchy
- Read-only QuickBooks data
- “View in QuickBooks” links

4. Scenario Planning (Ran Liu + Lazarev)

- Card-based scenario selection
- Clear status indicators
- Comparison view for analysis

5. Scenario Editor (Octet + Ran Liu)

- Complex logic builder
- Clean, organized interface
- Real-time validation
- Preview panel

6. AI Strategy Builder (Lazarev + Octet)

- Guided wizard flow
- Clear progress indication
- Verification step
- AI recommendations

7. Playbook Report (Ana Vadillo + Fuselab)

- Comprehensive financial report
- Charts and tables
- AI insights
- Export functionality

8. Settings (Octet + Ran Liu)

- Organized tab navigation
- Clear form patterns
- QuickBooks connector management

9. Audit Trail (Ana Vadillo + Fuselab)

- Detailed log table
- Timeline visualization
- Filter and search

10. Feature Requests (Lazarev + Octet)

- Community feedback portal
- Voting system
- Roadmap view

11. Calendar (Fuselab + Octet)

- Event visualization
 - Google Calendar sync
 - Status-coded events
-

Implementation Confidence by Page

Page	Primary Designer	Confidence	Notes
Login	Lazarev	95%	Simple, clean pattern
Navigation	Octet	95%	Standard component-based
Dashboard	Fuselab + Ran Liu	90%	React Grid Layout proven
Accounts	Ana Vadillo	92%	Tables are my strength
Scenario Planning	Ran Liu + Lazarev	93%	Card layouts straightforward
Scenario Editor	Octet + Ran Liu	88%	Complex but doable
AI Wizard	Lazarev + Octet	90%	Multi-step form pattern
Report	Ana Vadillo + Fuselab	90%	Tables + charts
Settings	Octet + Ran Liu	95%	Standard settings patterns
Audit Trail	Ana Vadillo + Fuselab	92%	Table + timeline
Feature Requests	Lazarev + Octet	90%	Card + voting pattern
Calendar	Fuselab + Octet	85%	Calendar library available

Overall Confidence: 91%

Development Prompt

When I begin Phase 1 development, I will use this exact prompt internally:

"Build the Financial Playbook application using the following UI design references:

Foundation: Octet's component-based design system approach + Ran Liu's clean, hierarchical layouts with calm color palettes

Financial Specifics: Ana Vadillo's finance-grade tables with strong typographic hierarchy and carefully constrained colors for financial data display

Dashboard & Visualization: Fuselab Creative's configurable widget-based dashboards and data visualization patterns

Polish & Flows: Lazarev's professional fintech aesthetic, onboarding flows, and empty states (applied selectively)

Technical Stack: React 19, Tailwind CSS 4, shadcn/ui components, Chart.js for visualization, React Grid Layout for dashboard

Visual Language: Traffic light status system (green/yellow/red glows) applied consistently across all pages. Clean, professional, data-dense without clutter. Component-based architecture for consistency and scalability."

Final Selections Summary

My 4 Primary Designer/Agency References:

1. **Octet** (95% confidence) - Design system foundation, component consistency
2. **Ran Liu** (95% confidence) - Clean hierarchy, layout structure
3. **Ana Vadillo** (92% confidence) - Financial tables, dense data display
4. **Fuselab Creative** (90% confidence) - Dashboard, widgets, data visualization

Polish Layer:

1. **Lazarev** (92% confidence, selective) - Professional fintech aesthetic, empty states, onboarding

Overall Implementation Confidence: 91%

No complexities beyond my capabilities with this combination.

Next Steps

1.  Designer selections finalized
2.  Begin Phase 1: Set up design system foundation
3.  Build component library based on Octet + Ran Liu

4.  Implement dashboard with Fuselab patterns
5.  Create financial tables with Ana Vadillo patterns
6.  Apply Lazarev polish selectively
7.  Implement traffic light status system
8.  Complete all 11 pages
9.  Test, refine, deploy

Ready to begin Phase 1 development with these exact UI references.