

ChatLLM-Style Transaction Display Card

Overview

Updated the Bank Statement Processor to display all extracted transactions in a card format after processing completes, similar to the ChatLLM interface with RouteLLM.

What Changed

1. Enhanced UI Display

File: /app/components/bank-statements/bank-statements-client.tsx

Added Transaction Interface

```
interface Transaction {
  id: string;
  date: string;
  description: string;
  amount: number;
  type: 'INCOME' | 'EXPENSE' | 'TRANSFER';
  category?: string;
  merchant?: string;
  metadata?: any;
  businessProfileId?: string;
}
```

Updated Message Interface

- Added `transactions?: Transaction[]` to store extracted transactions
- Added `statementMonth?: string` to display the statement period

Transaction Fetching

After successful PDF processing:

- Automatically fetches all transactions for the uploaded statement
- Extracts the statement month from transaction dates or filename
- Stores transactions in the success message

Transaction Card Display

- **Header:** Shows statement month (e.g., “January 2024”) with transaction count
- **Scrollable List:** Displays all transactions with:
 - Business/Personal indicator icons (🏢 Building2 for Business, 🏠 Home for Personal)
 - Transaction description (truncated if needed)
 - Date formatted as “Jan 8, 2024”
 - Category badge
 - Amount with +/- indicator (green for income, red for expenses)
 - Merchant name (if available)
- **Styling:**
 - Scrollable container (max-height: 400px)

- Hover effects on transaction cards
- Color-coded amounts (green for income, red for expenses)
- Professional layout matching ChatLLM design

2. API Enhancement

File: /app/app/api/transactions/route.ts

Added Statement Filtering

- New query parameter: `statementId`
- Filters transactions by specific bank statement
- Bypasses business profile filter when fetching by statement ID

```
const statementId = searchParams.get('statementId');

if (statementId) {
  where.statementId = statementId;
}
```

User Experience

Chat Flow

1. **User uploads PDF** → “Business Statement_Jan_8_2024.pdf”
2. **LLM processes** → Extracts 118 transactions
3. **Success message appears** with:
 - Confirmation
 - Summary (total, business, personal counts)
 - **Transaction Card** showing all transactions for that month

Transaction Card Features

- **Month Header:** “January 2024” (extracted from filename or transaction dates)
- **Transaction Count:** “118 transactions”
- **Individual Cards:** Each transaction shows:
 - Profile type indicator (Business/Personal)
 - Description
 - Date
 - Category
 - Amount with +/- sign
 - Merchant (if available)

Testing

The system has been tested and confirmed working:

- Build successful
- TypeScript compilation passed
- All API routes functional
- Transaction card displays correctly after processing

Next Steps

Users can now:

1. Upload any PDF bank statement
2. Select their preferred LLM model
3. Let the AI extract all transactions
4. See all extracted transactions immediately in a card
5. Scroll through the complete list of transactions for that month

The interface now matches the ChatLLM experience where extracted data is immediately visible in a structured, easy-to-read format.