

UI Specification: Client Profile (Role ID: 5)

Role: Client User (Business Owner)

Scope: Limited to entities linked via client_user_access.

Target Device: Mobile (Primary) & Desktop.

Design Philosophy: Clean, "Banking App" aesthetic. Minimal jargon.

1. Global Shell & Navigation

Database Context: client_user_access (Determines which companies this user can see).

Canvas Regions:

- **Top Bar (Context Switcher):**
 - **Entity Selector:** Dropdown to switch between companies if the user owns multiple (e.g., "🏥 Dr. Juan Clinic" ⬇️ "🍔 Burger Joint").
 - **Notifications:** Bell Icon (Tax alerts, Message replies).
 - **Profile:** Avatar.
- **Bottom Bar (Mobile) / Left Sidebar (Desktop):**
 1. 🏠 **Home** (Dashboard).
 2. 💵 **Pagos a CINPRO** (Pay Firm Fees).
 3. 📊 **Mis Contabilidades** (Tax & Financial Status).
 4. 💬 **Comunicacion** (Chat & Support).
 5. ⚙️ **Configuración** (Documents & Certs).

2. Section: Home (Dashboard)

Focus: The "Pulse" of the business and urgent alerts.

Canvas Region: Business Pulse (Cards)

- **Estimated Tax Due:**
 - *Data:* Calculated from current month's cfdi (Income - Expense) * Tax Rate (approx).
 - *Visual:* "Est. Taxes: \$12,500 MXN" (Disclaimer: "Estimation only").
- **Pending Fees:**
 - *Data:* Sum of unpaid service_contracts.
 - *Action:* "Pay Now" button (Links to Pagos section).
- **Missing Info:**
 - *Alert:* "Upload October Bank Statement".
 - *Action:* "Upload" button.

Canvas Region: Recent Timeline

- **List:** Vertical timeline of events.

- "Tax Declaration Filed (Oct)" - [Download Icon].
- "Payment Verified by Admin" - [Check Icon].
- "New Message from Accountant" - [Chat Icon].

3. Section: Pagos a CINPRO (Fee Payment)

Focus: Uploading proof of payment for the Firm's accounting services.

Database Context: cfdis (where Issuer = Firm) and client_payment_proofs.

Step 1: Select Invoices (The "Cart")

- **Header:** "Pending Invoices from CINPRO".
- **List:** List of unpaid bills issued by the accounting firm.
 - **Row:** Service Name ("Monthly Accounting"), Month ("October"), Amount.
 - **Interaction:** Checkboxes to select items.
- **Sticky Footer:**
 - "Total Selected: \$5,800.00".
 - Button: "Report Payment".

Step 2: Upload Proof (The Modal)

- **Instruction:** "Please upload the SPEI screenshot or Deposit Slip for \$5,800.00".
- **Uploader:**
 - **File:** Image/PDF Dropzone (file_url).
 - **Date:** Date Picker (payment_date).
 - **Reference:** Optional text input.
- **Action:** "Submit Proof".
 - *Backend:* Creates client_payment_proofs record and multiple client_payment_allocations linked to the selected invoices.
 - *Feedback:* "Proof Sent! Status: Pending Verification."

4. Section: Mis Contabilidades (Accounting Status)

Focus: Transparency on the work the firm is doing.

Tab A: Monthly Progress

- **Visual:** Stepper / Progress Bar for the current month.
 1. **Docs Received:** (Green if Statements uploaded).
 2. **Processing:** (Percentage of Bank Lines reconciled).
 3. **Calculated:** (Draft Taxes ready).
 4. **Filed:** (Acuse received from SAT).
- **Detail:** "Your accountant is currently reconciling week 3 of October."

Tab B: Financial Overview

- **Chart:** Income vs Expenses (Bar Chart).

- **List:** Top Expenses this month.
- **Download Center:**
 - **Grid of Files:**
 - "Estado de Resultados (PDF)"
 - "Acuse SAT (PDF)"
 - "Opinion de Cumplimiento (PDF)"

5. Section: Comunicacion (Support Hub)

Focus: Direct line to the assigned Accountant/Chief.

Canvas Region: Chat Interface

- **Header:** "Chatting with [Accountant Name]".
- **Message Bubble Types:**
 - **Text:** Standard messages.
 - **Request:** "Please clarify this expense: \$500 at Starbucks."
 - *Client Action:* Reply "Business Meeting" or "Personal".
 - **System:** "Tax Declaration Filed".

Canvas Region: AI Agent

- **Floating Button:** "Ask CINPRO AI".
- **Capabilities:**
 - "How much did I spend on Gas last month?"
 - "Send me my Tax ID (Constancia)."
 - "Upload a receipt photo."

6. Section: Configuración (Settings & Docs)

Focus: Keeping legal data up to date.

Tab A: Digital Certificates (SAT)

- **Display:**
 - **e.firma:** Status (Active), Expiry Date.
 - **CSD (Sells):** Status (Active), Expiry Date.
- **Alert:** Red banner if < 30 days to expiry.
- **Action:** "Update Certificate".
 - *Secure Form:* Upload .cer, .key, and Password. (Encrypted on send).

Tab B: Entity Documents (Expediente)

- **List:**
 - Acta Constitutiva.
 - Comprobante de Domicilio.
 - ID of Legal Rep.

- **Action:** "Upload New Version".
 - *Backend:* Updates entity_documents table.

Tab C: User Profile

- **Fields:** Name, Email, Phone Number.
- **Security:** Change Password.