📱 UI Specification: Chief Accountant Profile (Role ID: 3)

Role: Chief Accountant (Group Manager)
Scope: Restricted to assigned client_group_id (e.g., "Medical Sector").
Target Device: Desktop (Primary), Tablet (Secondary).
Frontend Framework Context: React/Angular components using Tailwind CSS grid layouts.

1. Global Shell & Navigation

Database Context: client_groups (The Chief is linked to one), staff (Accountants reported to this Chief).

Canvas Regions:

- **Left Sidebar (Navigation):**
  1. 🏠 **Home** (Group Dashboard & Pulse).
  2. 🏢 **Clientes** (Client Balances & Tax Status).
  3. 👮 **Supervision** (Accountant Progress & Queues).
  4. 📈 **Estadisticas** (Team Metrics & Personal Commissions).
  5. 💬 **Comunicacion** (Team Chat & Fiscal Calendar).
- **Top Bar:**
  - **Group Badge:** Display client_groups.group_name prominent badge (e.g., "🏥 Medical Group").
  - **Global Search:** Scoped to entities within client_group_id.
  - **Notifications:** Badge for "Review Requests" from junior accountants.

2. Section: Home (Group Dashboard)

Focus: Immediate insights into the health of the assigned Client Group.

Canvas Region: KPI Cards (Top Row)

Display 4 metric cards specific to the assigned group.

1. **Tax Compliance:**
   - *Metric:* % of clients with current month's taxes filed.
   - *Visual:* Circular Progress Bar.
2. **Open Reviews:**
   - *Metric:* Count reconciliation_log WHERE confidence_score < 0.8 AND status = 'draft'.
   - *Color:* Orange (Needs Attention).
3. **Group Revenue:**
   - *Metric:* Sum service_contracts.amount for this group.
   - *Context:* "vs Last Month".

4. **Critical Alerts:**
    ○ *Metric:* Count clients with debt_status = 'critical'.

Canvas Region: "The Triage" (Main Feed)

- **Title:** "Items Requiring Approval".
- **Component:** List of low-confidence AI matches or manual flags from Accountants.
- **Columns:**
    ○ **Client:** Name.
    ○ **Transaction:** Bank Desc + Amount.
    ○ **AI Suggestion:** "Invoice #123 (50% match)".
    ○ **Action:** "Approve" / "Reject & Note".

3. Section: Clientes (Client Status)

Focus: The accounting status of every company in the group.

Tab A: Master Status List

Frontend Component: Sortable Data Table.

Columns:

1. **Client Entity:** Name + RFC.
2. **Current Balance:**
    ○ *Data:* From estado_cuenta (Calculated: Inflows - Outflows).
    ○ *Visual:* Green/Red text.
3. **Tax Status:**
    ○ *Visual:* Status Chips (e.g., "Pending Declaration", "Filed", "Overdue").
4. **Last Activity:** Timestamp of last CFDI download or Bank Match.
5. **Assigned Accountant:** Avatar of the worker.
6. **Action:** "Drill Down" (Opens Detail View).

Tab B: Client Detail View (Drill Down)

- **Header:** Client Revenue & Contact Info.
- **Tab 1 - Ledger:** View the reconciliation_log for this specific client (Read-only view of what the Accountant did).
- **Tab 2 - Documents:** List of downloaded CFDIs.
- **Tab 3 - Chat Log:** History of ai_interactions for this client.

4. Section: Supervision (Team Oversight)

Focus: Monitoring the human workers (Accountants).

Tab A: Accountant Progress Board

Frontend Component: Card Grid.

Render one card per Accountant assigned to this Group.

Card Layout:

1. **Header:** Accountant Avatar + Name + Status (Online/Offline).
2. **Workload Bar:**
   - *Visual:* Multi-colored progress bar.
   - *Segments:* Reconciled (Green) | Pending AI Review (Yellow) | Unmatched (Red).
3. **Key Metric:** "Avg Response Time" (e.g., 2h).
4. **Action:** "View Queue" button.

Tab B: The "Pending Tasks" Queue

Goal: See exactly what is stuck in an Accountant's pipeline.

- **Filter:** Select Accountant.
- **List Content:**
  - "50 Unreconciled Bank Lines for [Client X]".
  - "Missing Bank Statement PDF for [Client Y]".
- **Interaction:** The Chief can click a "Prioritize" star icon to move a task to the top of the Accountant's list.

5. Section: Estadisticas (Analytics)

Tab A: Team Performance

Charts:

1. **Reconciliation Speed:** Bar chart comparing Accountants (Items processed per hour).
2. **Error Rate:** % of matches rejected by the Chief during review.
3. **Client Satisfaction:** (Derived from AI Chat sentiment or speed of response).

Tab B: Mis Comisiones (Personal Revenue)

Focus: Revenue from clients this Chief personally brought to the firm.

Data Table:

1. **Client Name:** Source.
2. **Contract Value:** Monthly Fee.
3. **My Cut:** agreed_commission_percent (e.g., 5%).
4. **Earned This Month:** Calculated $.
5. **Payout Status:** commissions_payable.status (Pending/Paid).

6. Section: Comunicacion (Hub)

Tab A: Mensajes (Unified Inbox)

Frontend Component: Chat Interface (e.g., StreamChat style).

Sidebar Channels:

1. **Team General:** Broadcast to all accountants in the group.
2. **Direct Messages:** 1:1 with specific Accountants.
3. **Client Intercepts:** Threads where AI Agents requested human help.

Tab B: Calendario Fiscal

Frontend Component: FullCalendar.

Layers:

1. **Group Deadlines:** Specific tax filing dates for this sector (e.g., Medical reports vs Construction reports).
2. **Internal Reviews:** Scheduled dates to review work before sending to Admin.