

ExpenseFlow Pro

Feature Documentation & Technical Specifications

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Abstract

This document serves as the official reference for the new Family and Joint Account features implemented within **ExpenseFlow Pro**. It details the user interface enhancements, functional logic, and the technical implementation of the shared financial ecosystem.

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1 Overview

ExpenseFlow Pro has been upgraded to support multi-user financial management. This update transitions the application from a single-user personal finance tracker to a collaborative family banking and expense tracking platform. The core focus is on seamless transition between personal and shared assets while maintaining distinct user permissions.

2 Core Features

2.1 1. Joint Accounts Ecosystem

The application now supports two distinct account types: **Personal** and **Joint**.

- **Visual Distinction:** Joint accounts are rendered with a distinct visual style using a gradient background (Indigo to Purple) and holographic design elements to differentiate them instantly from white-background Personal accounts.
- **Shared Ownership:** Joint accounts display dual-avatar indicators on the dashboard card, representing the primary user and linked partners (e.g., "You" + "PG").
- **Aggregated Balance:** The dashboard now calculates a "Joint Savings" total separate from "Personal Wealth" to give users a clear picture of shared liquidity.

2.2 2. Family Hub Management

A dedicated "Family" view has been introduced to manage the digital household.

- **Member Directory:** Visual cards display all linked family members, including their initials, avatars, and connection status.
- **Role-Based Access Control (RBAC):**
 - **Partners:** Have "Full Access" to view and transact on Joint accounts.
 - **Children:** Have "View Only" access or restricted "Allowance" limits (e.g., \$50/month).
- **Invite System:** A streamlined "Invite Member" flow allows the primary user to add new members to the dashboard dynamically.

2.3 3. Unified Dashboard & Expense Tracking

The dashboard has been restructured to accommodate new data streams and expense analytics.

- **Wealth Overview:** Top-level statistics now breakdown financial health into "Total Balance," "Joint Savings," and "Monthly Spending."
- **Goal Tracking:** A gamified "Family Goal" widget (e.g., Vacation Fund) visualizes progress toward shared financial targets using progress bars and motivational data points.
- **Smart Transaction Log:** The "Recent Activity" section aggregates transactions from all linked accounts. It features:
 - Visual icons for categories (Shopping, Salary, Subscriptions).
 - Color-coded amounts (Green for income, Black/Red for expenses).
 - Relative dating (e.g., "Today", "Yesterday").

3 User Interface Design

The design follows a modern, clean aesthetic tailored for clarity and trust.

- **Color Palette:**
 - *Emerald Green:* Used for positive trends, income, and personal wealth.
 - *Indigo/Purple:* Reserved exclusively for Joint and Family features to create a mental model of "shared space."
 - *Slate Gray:* Used for text and structural elements to reduce eye strain.
- **Responsive Layout:** The application utilizes a grid-based layout that adapts to mobile and desktop viewports, with a collapsible navigation menu for smaller screens.

4 Technical Implementation

4.1 Data Persistence (Firebase)

The application utilizes Google Firebase Firestore for real-time data storage.

- **Collection Structure:** Data is siloed under `artifacts/{appId}/users/{userId}/`.
- **Sub-collections:**
 - `accounts`: Stores account metadata, balances, and types (Joint/Personal).
 - `family`: Stores linked user profiles, roles, and access levels.
- **Real-time Listeners:** React `useEffect` hooks utilize `onSnapshot` to update the UI instantly when a family member makes a transaction or updates a setting.

4.2 Security Considerations

- **Authentication:** Uses Firebase Anonymous Auth (upgradable to Email/Pass) to secure the session.
- **Isolation:** User data is strictly siloed by User ID (UID), ensuring that family data does not leak between different main accounts in the database.