

## 1. Dashboard Screen

## Layout Components:

PERSONAL FINANCE TRACKER

[Dashboard]

[Transactions]

[Accounts]

[Budget]

[Reports]

TOTAL BALANCE

\$12,450.00

INCOME (Month)

\$3,500.00

CASH FLOW FORECAST

Chart Area

EXPENSES (Month)

\$1,850.00

SAVINGS RATE

45%

Next 30 Days Forecast

RECENT TRANSACTIONS

BUDGET ALERTS

✓ Swiggy Food Delivery

Food & Dining

✓ Salary Credit

Salary

⚠ Large Purchase

Shopping - ANOMALY DETECTED

-\$25.00

\$450 / \$500

(90% used)

+\$3,500

\$1,200 / \$1,200

-\$350.00

● Food & Dining

● Rent

(100% used)

Entertainment

View All Transactions →\$200 / \$150(OVER)

Key Features:

- Total balance across all accounts
- Monthly income/expense summary
- Cash flow forecast chart (TRD ML forecasting)
- Recent transactions with anomaly alerts (TRD anomaly detection)
- Budget progress with color-coded alerts (green/yellow/red)
- Quick access to all main features via top navigation

2. Transactions List Screen

Purpose: View and manage all transactions (BRD FN-07)

Layout:

TRANSACTIONS[Add Transaction]

Filters: [All Accounts ▾] [All Categories ▾] [Date Range ▾] |

Search: [ 🔍 Description... ]

DATE	DESCRIPTION	CATEGORY	ACCOUNT	AMOUNT
2024-10-15	Swiggy Food Delivery	Food & Dining	Primary	-\$25.00
2024-10-14	Amazon Purchase	Shopping	Primary	-\$89.99
2024-10-10	Salary Deposit	Salary	Primary	+\$3,500
2024-10-08	⚠️ Luxury Watch	Shopping	Primary	-\$350.00
	ANOMALY - Large amount for Shopping			
	[Mark as Normal] [Ignore]			
2024-10-05	Groceries Weekly	Groceries	Primary	-\$120.50
2024-10-01	Rent Payment	Rent	Primary	-\$1,200

Showing 1-6 of 150 transactions

[< Previous] [1] [2] [3] [Next >]

Key Features:

- Filter by account, category, date range
- Search by description
- Anomaly detection highlights with actions
- Pagination for large datasets
- Quick add transaction button

### 3. Add/Edit Transaction Screen

Purpose: Add new transactions with smart features (BRD FN-03, FN-08)

Layout:

text

ADD TRANSACTION

Transaction Type: ☒ Expense ☐ Income ☐ Transfer

Description: [Swiggy Food Order]

Suggested: Food & Dining (92% match)

[Use Suggestion]

[Ignore]

Amount: [\$ 25.00]

Date: [2024-10-16] [📅]

Account: [Primary Account ▾]

Category: [Food & Dining ▾]

Notes: [Dinner with friends]

(optional)

[Cancel]

[Save Transaction]

Key Features:





- Real-time category suggestion as user types (TRD smart categorization)
- Confidence percentage display
- One-click to use suggested category
- Transfer type for moving between accounts
- Form validation

## 4. Accounts Management Screen

Purpose: Manage financial accounts (BRD FN-02)

ACCOUNTS	[Add New Account]
PRIMARY CHECKING ACCOUNT	\$8,750.00
• Checking Account	
Initial Balance: \$10,000   Current: \$8,750	
[Edit] [View Transactions]	
SAVINGS ACCOUNT	\$3,700.00
• Savings Account	
Initial Balance: \$3,500   Current: \$3,700	
[Edit] [View Transactions]	
CREDIT CARD	-\$450.00
• Credit Card	
Credit Limit: \$5,000   Available: \$4,550	
[Edit] [View Transactions]	

## 5. Add/Edit Account Screen

ADD ACCOUNT
Account Name: [Primary Checking Account ]
Account Type: [Checking Account ▾ ]
○ Checking ○ Savings ○ Credit Card
Initial Balance: [\$ 10,000.00 ]
Color: [  Blue ] [  Red ] [  Green ] [  Yellow ]
(for visual identification)
[Cancel] [Save Account]

## 6. Budget Management Screen

Purpose: Set and monitor monthly budgets (BRD FN-05, FN-11)

BUDGET MANAGEMENT				Oct 2024 [ <span>&lt;</span> ] [ <span>&gt;</span> ] [ <span>&gt;&gt;</span> ]		
CATEGORY	BUDGET	SPENT	REMAINING	PROGRESS		
Food & Dining	\$500	\$450	\$50	<div><div></div></div>		
	(90%)					
Groceries	\$400	\$320	\$80	<div><div></div></div>		
	(80%)					
Rent	\$1,200	\$1,200	\$0	<div><div></div></div>		
	(100%) - AT LIMIT!					
Transportation	\$300	\$150	\$150	<div><div></div></div>		
	(50%)					
Entertainment	\$150	\$200	-\$50	<div><div></div></div>		
	(133%) - OVER BUDGET!					
Shopping	\$250	\$350	-\$100	<div><div></div></div>		
	(140%) - OVER BUDGET!					
[Set Budget] [Use Recommendations] [Export Report]						

### Key Features:

- Visual progress bars with color coding
- Budget recommendations based on past spending (TRD budget recommendations)
- Monthly navigation
- Clear over-budget warnings

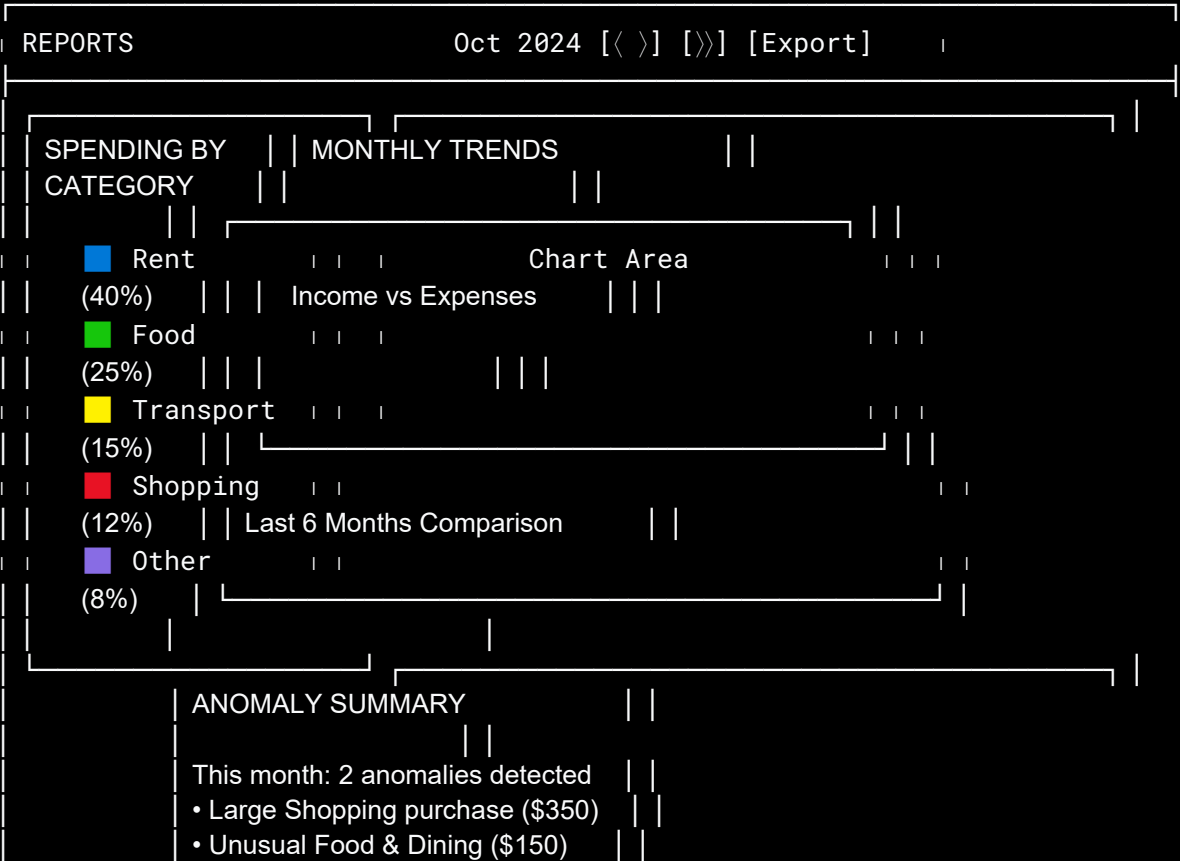
## 7. Set Budget Screen

SET BUDGET FOR OCTOBER 2024	
Food & Dining	
Your average spending: \$475 (last 3 months)	
Recommended budget: \$500	

Budget Amount: [ \$ 500.00 ]	
Groceries	
Your average spending: \$380 (last 3 months)	
Recommended budget: \$400	
Budget Amount: [ \$ 400.00 ]	
Rent	
Your average spending: \$1,200 (last 3 months)	
Recommended budget: \$1,200	
Budget Amount: [ \$ 1200.00 ]	
[Apply Recommendations to All]	
[Cancel]	[Save Budget]

## 8. Reports Screen

Purpose: Visual spending analysis (BRD FN-06)





[Review Anomalies]


## 9. ML Features Settings Screen


Purpose: Manage smart features (BRD FN-13)

### AI/ML SETTINGS

SMART CATEGORIZATION [Enabled]  | |  
Suggests categories based on transaction descriptions | |  
Accuracy: 89% (based on your usage) | |  
[View Learning Data] [Reset Model] | |

ANOMALY DETECTION [Enabled]  | |  
Flags unusual transactions for review | |  
Sensitivity: [Medium —————] | |  
(Low) (Medium) (High) | |

CASH FLOW FORECAST [Enabled]  | |  
Predicts future account balances | |  
Forecast horizon: 30 days | |  
Data available: 120 days | |

MODEL RETRAINING | |  
Last trained: 7 days ago | |  
Training data: 450 transactions | |  
[Retrain Models Now] (May take 2-3 minutes) | |  
 Retraining improves accuracy with your latest data | |

# 10. Responsive Design Considerations

Mobile View (Dashboard Example):

PERSONAL FINANCE TRACKER	
💰 TOTAL BALANCE	\$12,450.00
📊 MONTH SUMMARY	
Income:	\$3,500
Expenses:	\$1,850
Savings:	45%
⚠️ BUDGET ALERTS	
• Entertainment	OVER
• Food & Dining	(90%)
📄 RECENT TRANSACTIONS	
• Swiggy	-\$25
• Salary	+\$3,500
• ⚠️ Large	-\$350
☰ Menu	

## UI/UX Specifications:

1. Color Scheme:
- Primary: Blue (#1976D2)
  - Success: Green (#4CAF50)
  - Warning: Orange (#FF9800)
  - Error: Red (#F44336)
  - Background: Light Gray (#F5F5F5)
2. Typography:
- Headers: Roboto Bold
  - Body: Roboto Regular
  - Numbers: Roboto Mono
3. Components:
- Material-UI components throughout
  - Consistent spacing (8px grid)
  - Clear visual hierarchy



- Accessible color contrast
- 4. Interactions:
  - Hover states on all clickable elements
  - Loading spinners for async operations
  - Success/error toast notifications
  - Smooth transitions between screens

These screens cover all BRD requirements and implement the TRD technical specifications in a user-friendly interface suitable for a junior developer to implement.