AcadionAI Budget Management - Complete UI/UX Design System

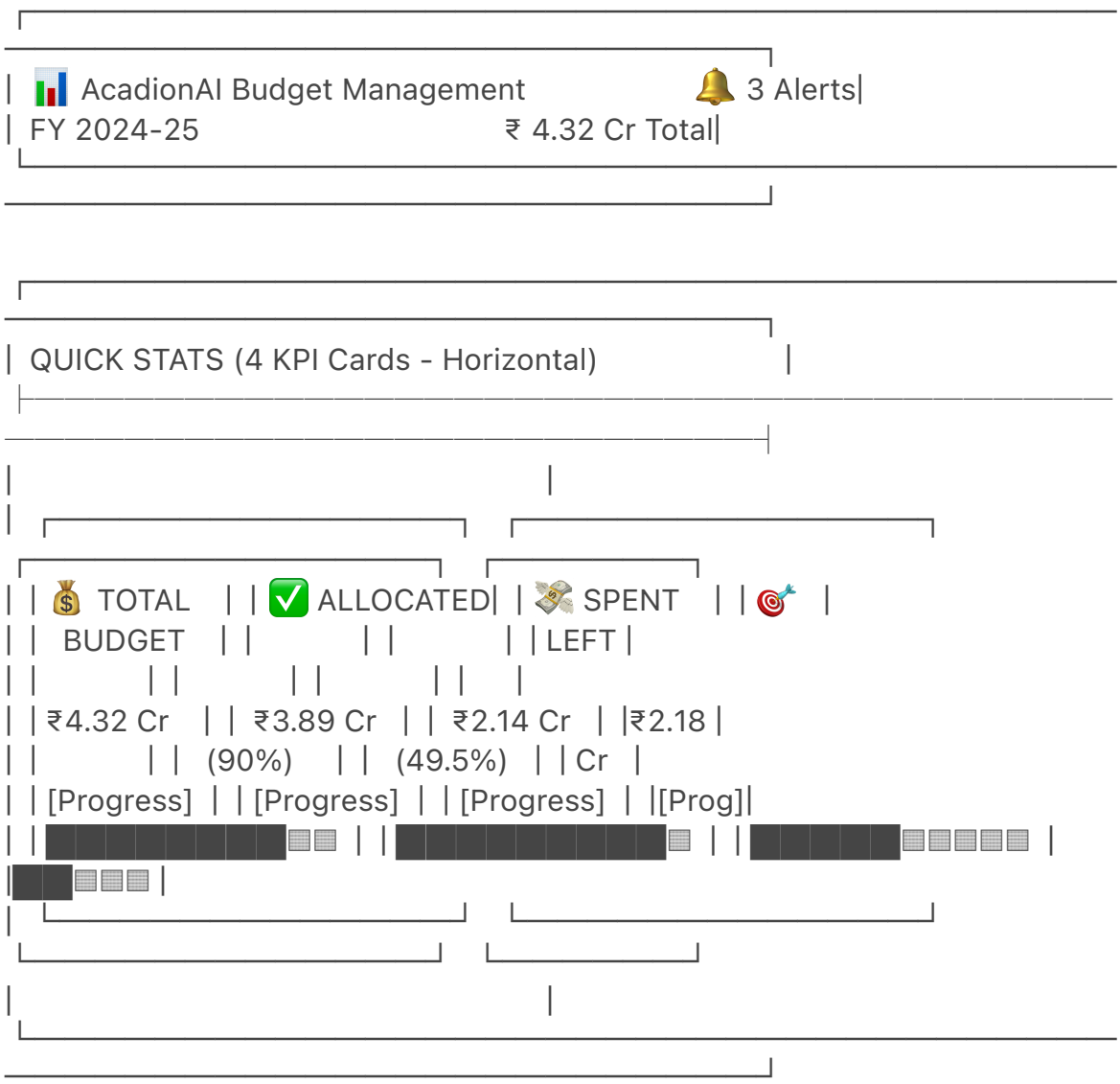
I'll create a comprehensive, intuitive UI design for your budgeting tool that makes complex financial management feel simple and visual.

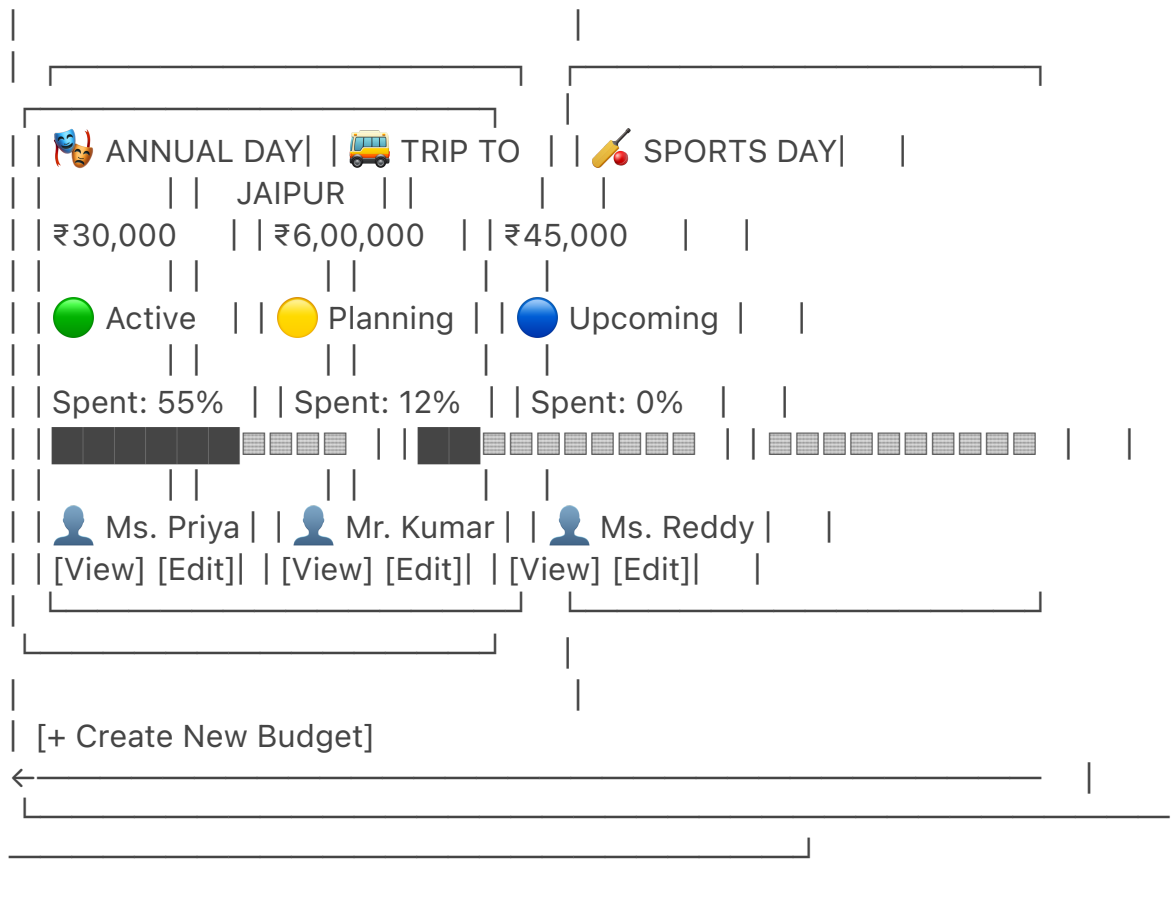
🎨 Core Design Philosophy

"Visual Money Management" - Every rupee should be visible, every action traceable, every status color-coded.

📊 1. MANAGEMENT DASHBOARD (Budget Overview Hub)

Landing View - Budget Cards Grid

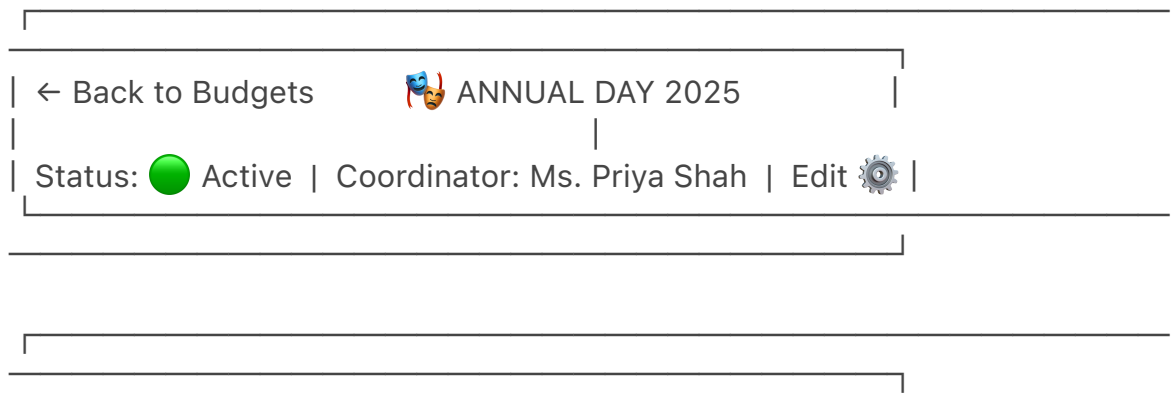


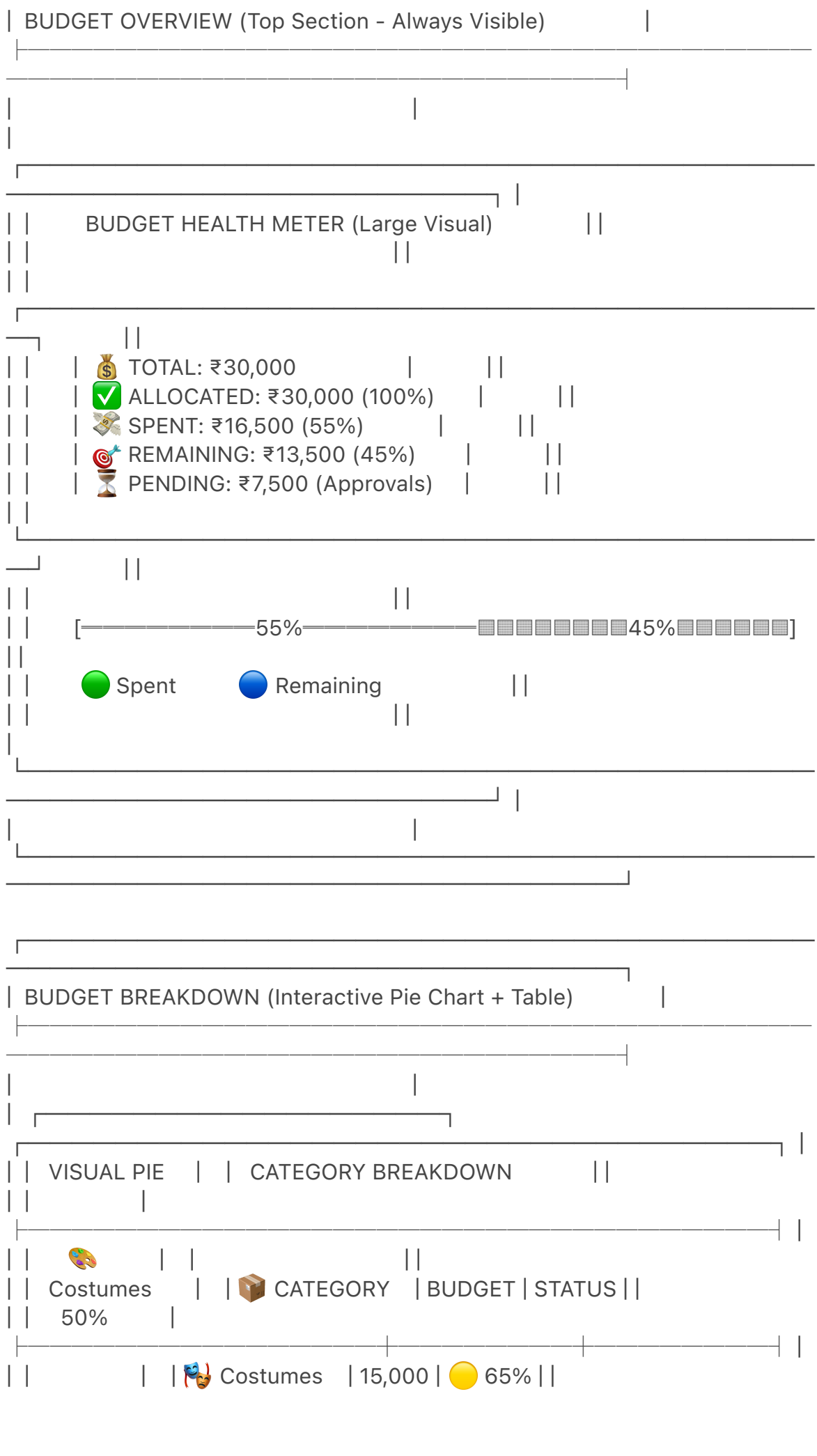


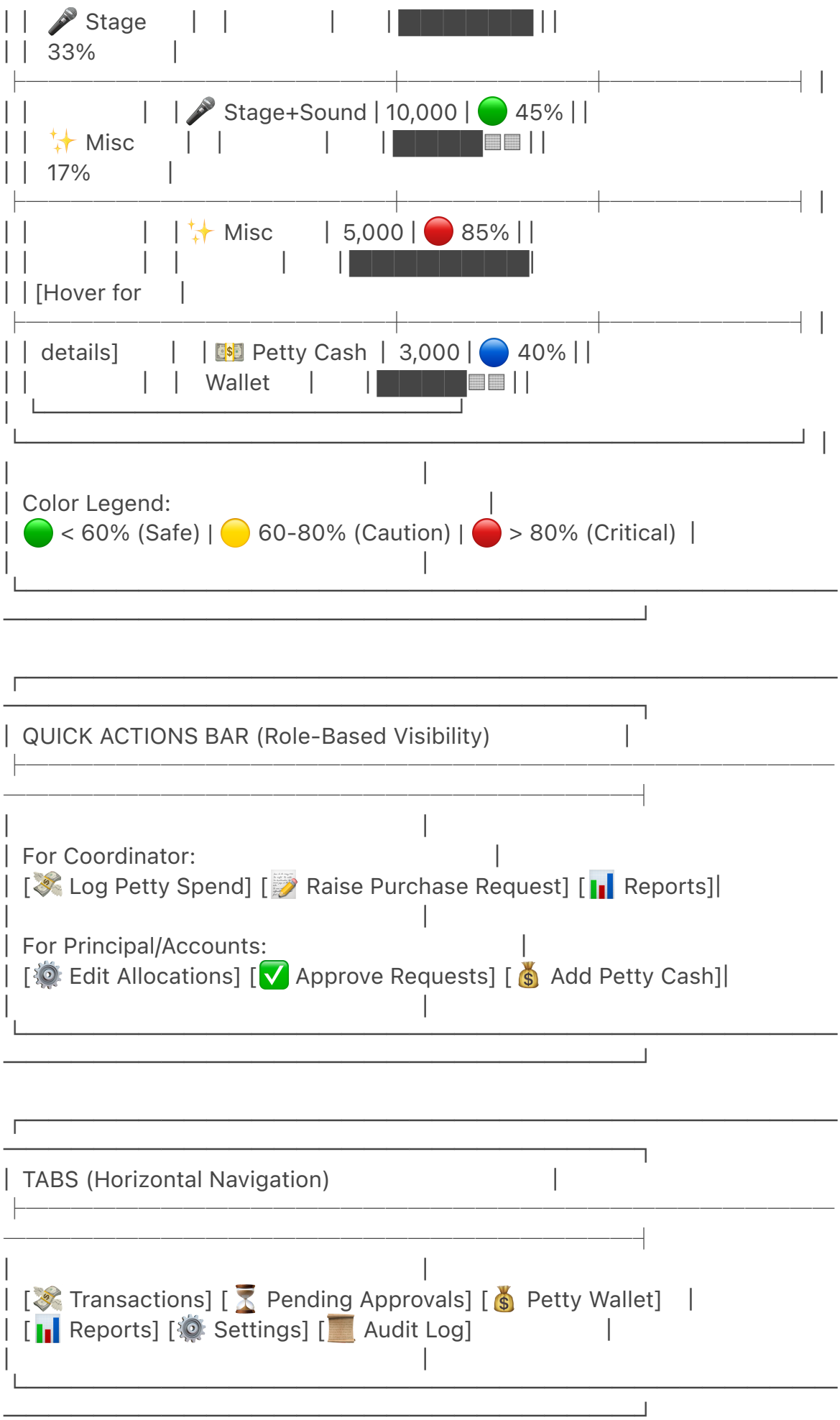
🎭 2. BUDGET TAB VIEW (Shared Canvas - All Roles See This)

Example: Annual Day 2025

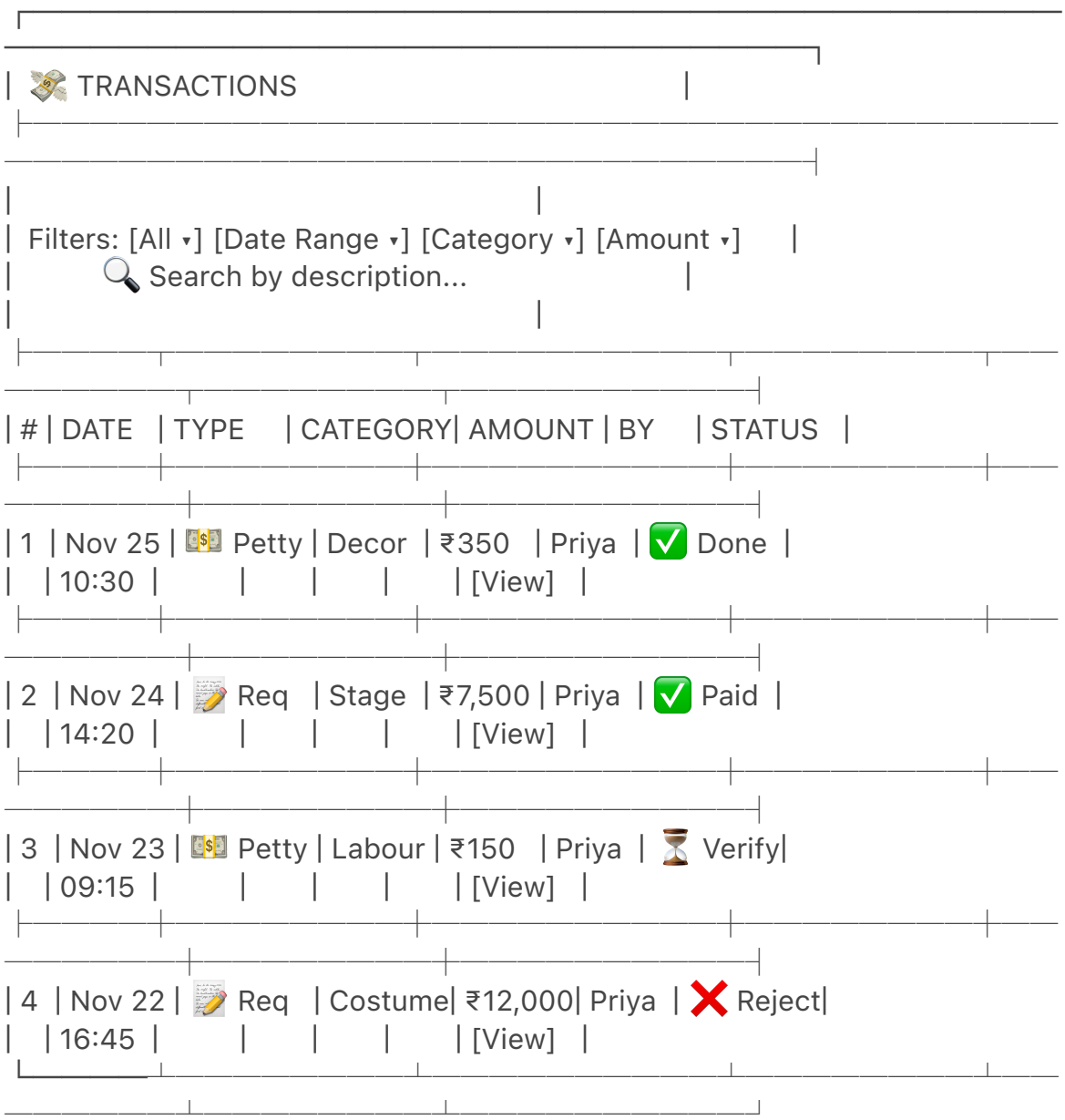
This is THE MOST IMPORTANT SCREEN - the shared workspace everyone accesses.




BUDGET OVERVIEW (Top Section - Always Visible)
BUDGET HEALTH METER (Large Visual)
💰 TOTAL: ₹30,000
✅ ALLOCATED: ₹30,000 (100%)
💸 SPENT: ₹16,500 (55%)
🎯 REMAINING: ₹13,500 (45%)
⏳ PENDING: ₹7,500 (Approvals)
[55%45%]
🟢 Spent
🔵 Remaining
BUDGET BREAKDOWN (Interactive Pie Chart + Table)
VISUAL PIE
CATEGORY BREAKDOWN
🎨
Costumes
50%
📦 CATEGORY
BUDGET
STATUS
🎭 Costumes
15,000
🟡 65%


🎤 Stage
33%
🎤 Stage+Sound | 10,000 | 🟢 45%
✨ Misc
17%
✨ Misc | 5,000 | 🔴 85%
[Hover for details]
💵 Petty Cash Wallet | 3,000 | 🔵 40%
Color Legend:
🟢 < 60% (Safe) | 🟡 60-80% (Caution) | 🔴 > 80% (Critical)
QUICK ACTIONS BAR (Role-Based Visibility)
For Coordinator:
[💸 Log Petty Spend] [📝 Raise Purchase Request] [📊 Reports]
For Principal/Accounts:
[⚙️ Edit Allocations] [✅ Approve Requests] [💰 Add Petty Cash]
TABS (Horizontal Navigation)
[💸 Transactions] [⏳ Pending Approvals] [💰 Petty Wallet]
[📊 Reports] [⚙️ Settings] [📜 Audit Log]

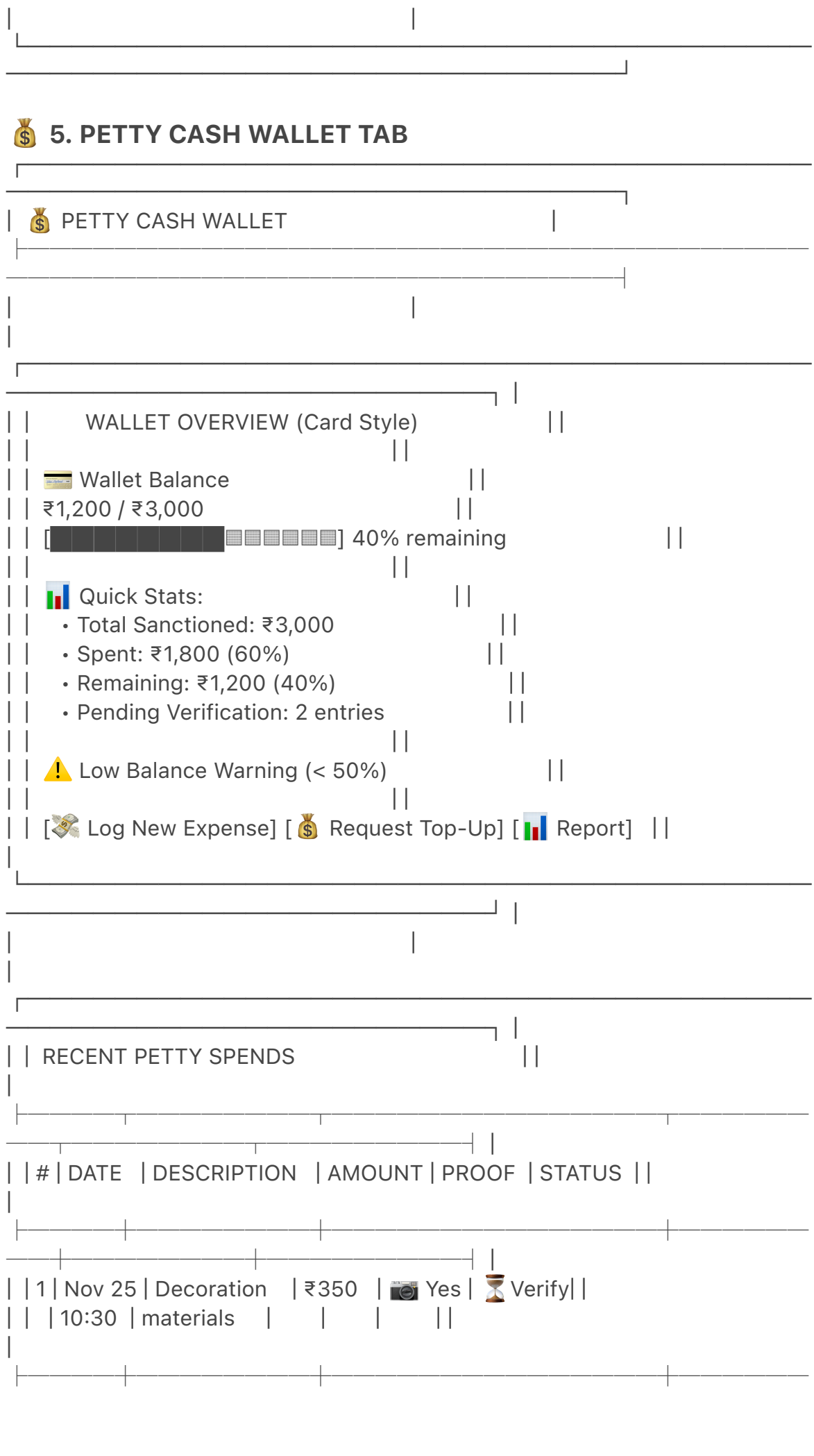
💸 3. TRANSACTIONS TAB (Detailed View)

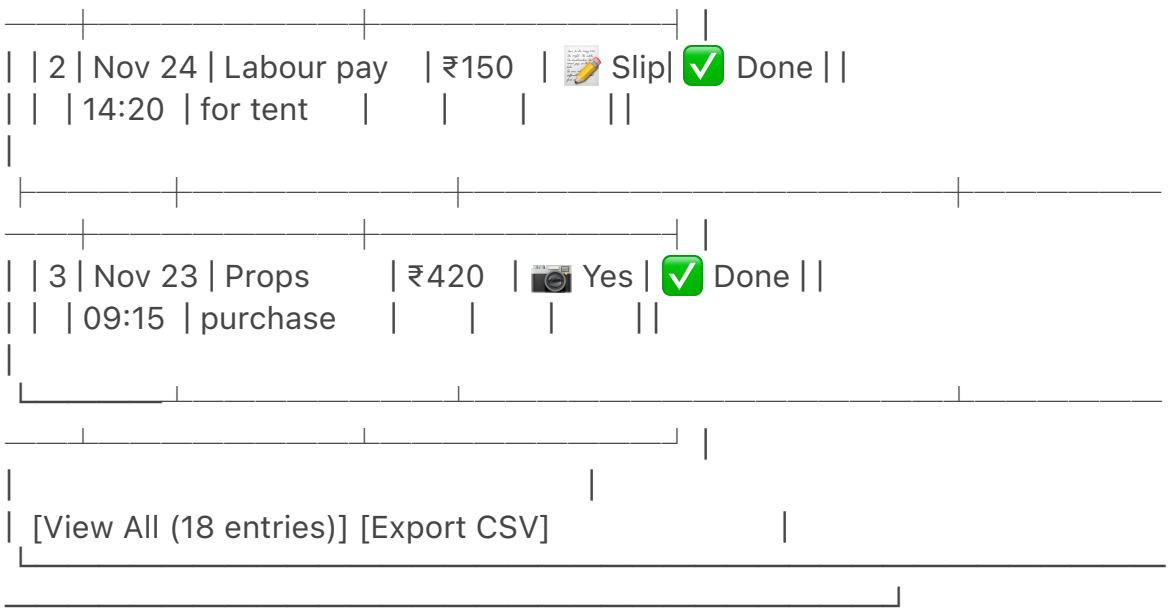


Click any row for detailed view with receipts, approval trail, notes

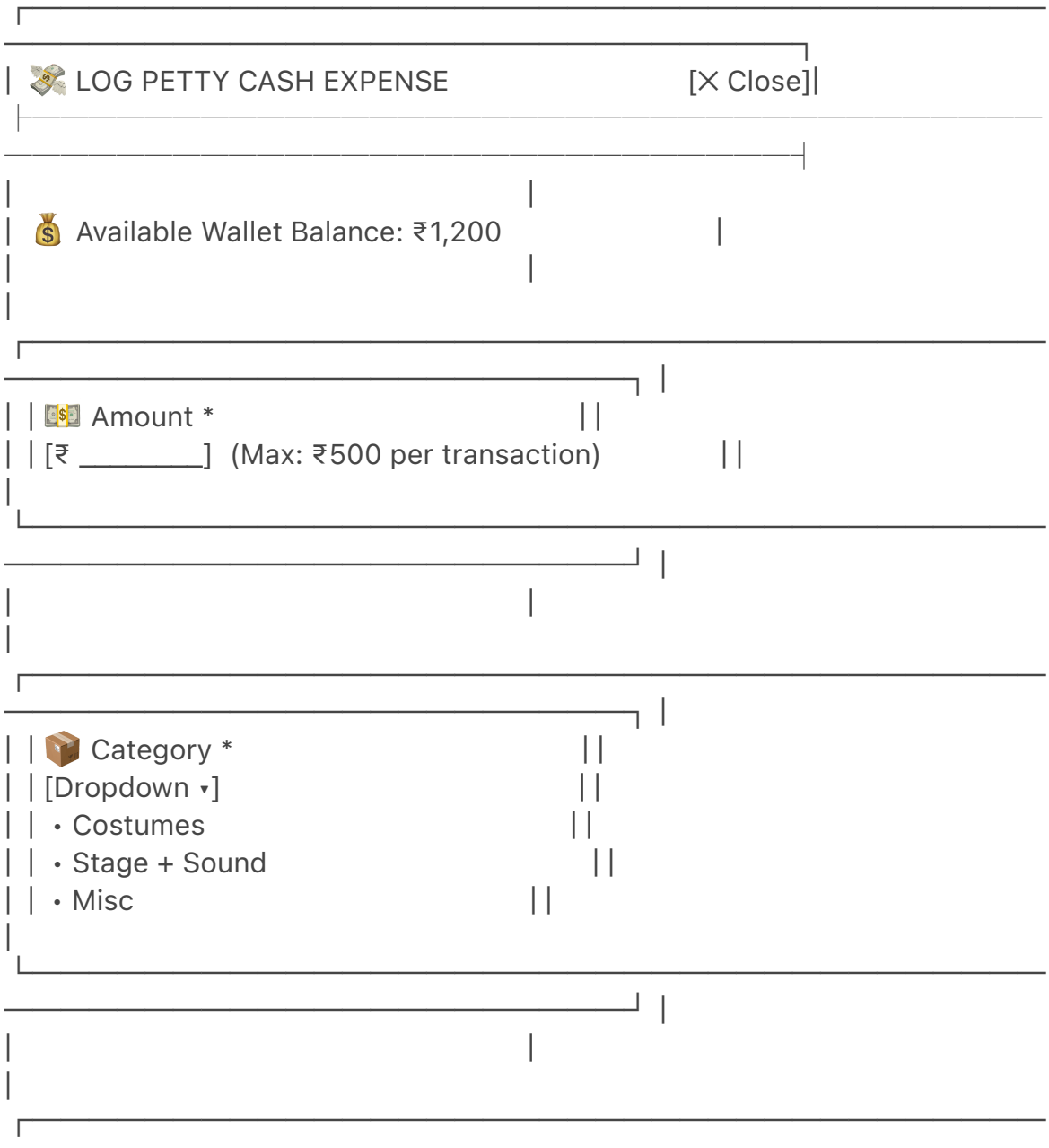
⏳ 4. PENDING APPROVALS TAB

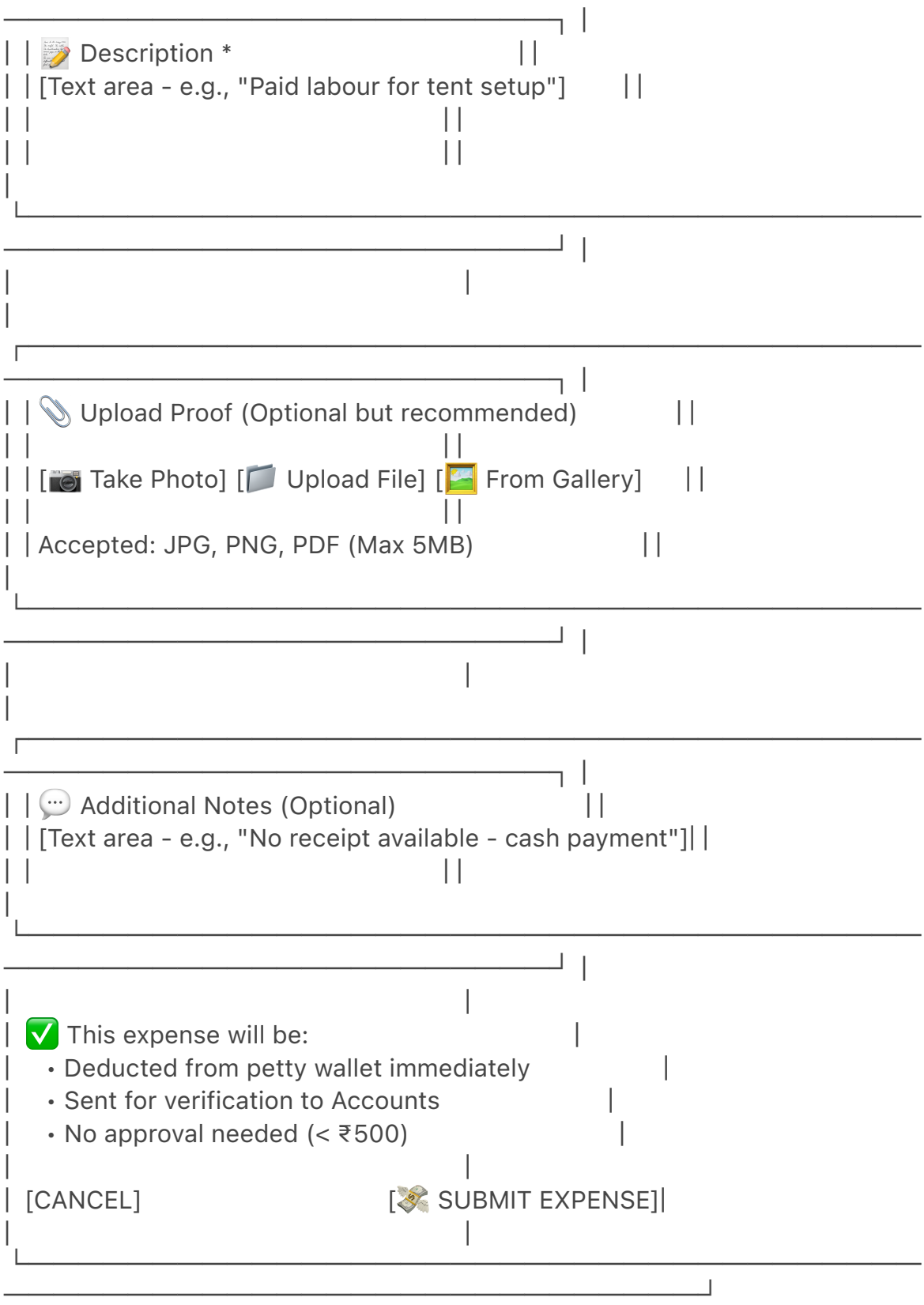
```
├──────────────────────────────────────────────────────────────────────────────────────┤ │
│ │Request #AR-2025-034                 📅 Nov 25, 2024    │ │
│ │                                                        │ │
│ │👤 Requested by: Ms. Priya Shah (Coordinator)           │ │
│ │💰 Amount: ₹8,500                                       │ │
│ │📦 Category: Stage + Sound → Lighting Equipment         │ │
│ │💡 Description: LED stage lights for main performance   │ │
│ │                                                        │ │
│ │📎 Attachments:                                         │ │
│ │   [📄 Quotation.pdf] [📷 Product_Image.jpg]            │ │
│ │                                                        │ │
│ │💬 Notes from requester:                                │ │
│ │   "Urgent - Performance on Dec 2nd"                    │ │
│ │                                                        │ │
│ │✅ Budget Check:                                        │ │
│ │   Stage+Sound: ₹10,000 allocated | ₹4,500 spent        │ │
│ │   Available: ₹5,500 ✅                                 │ │
│ │   This request: ₹8,500 ⚠️ EXCEEDS CATEGORY             │ │
│ │                                                        │ │
│ │📊 Approval Flow:                                       │ │
│ │   ✅ HOD (Ms. Reddy) - Approved Nov 25, 10:30 AM       │ │
│ │   ⏳ YOU (Principal) - Pending ← YOUR TURN             │ │
│ │                                                        │ │
│ │
┌──────────────────────────────────────────────────────────────────────────────────────┐ │ │
│ │ │💬 Add your comment (optional):                      │ │ │
│ │ │[Text box]                                          │ │ │
│ │ │                                                    │ │ │
│ │ │[✅ APPROVE]  [❌ REJECT]  [💬 REQUEST CLARIFICATION]│ │ │
│ │
└──────────────────────────────────────────────────────────────────────────────────────┘ │ │
│
└──────────────────────────────────────────────────────────────────────────────────────┘ │
│                                                                                        │
│
┌──────────────────────────────────────────────────────────────────────────────────────┐ │
│ │🟡 MEDIUM PRIORITY                                      │ │
│ │Request #AR-2025-035 - ₹3,200 - Costume Materials       │ │
│ │[Expand ▾]                                              │ │
│
└──────────────────────────────────────────────────────────────────────────────────────┘ │
```


5. PETTY CASH WALLET TAB
PETTY CASH WALLET
WALLET OVERVIEW (Card Style)
Wallet Balance
₹1,200 / ₹3,000
40% remaining
Quick Stats:
• Total Sanctioned: ₹3,000
• Spent: ₹1,800 (60%)
• Remaining: ₹1,200 (40%)
• Pending Verification: 2 entries
Low Balance Warning (< 50%)
Log New Expense
Request Top-Up
Report
RECENT PETTY SPENDS
DATE DESCRIPTION AMOUNT PROOF STATUS
1 Nov 25 10:30 Decoration materials ₹350 Yes Verify

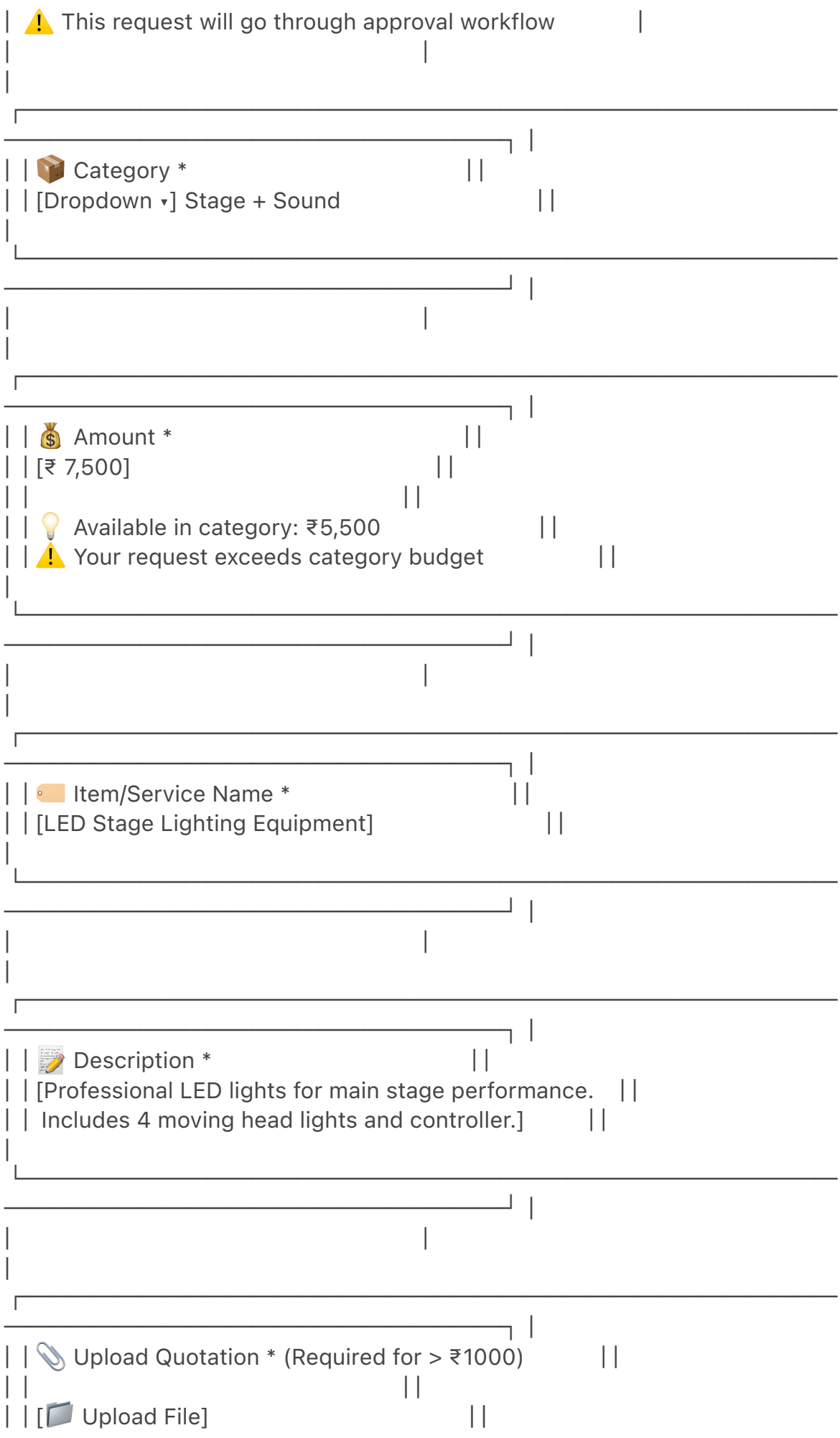


📝 6. LOG PETTY CASH EXPENSE (Modal/Popup)





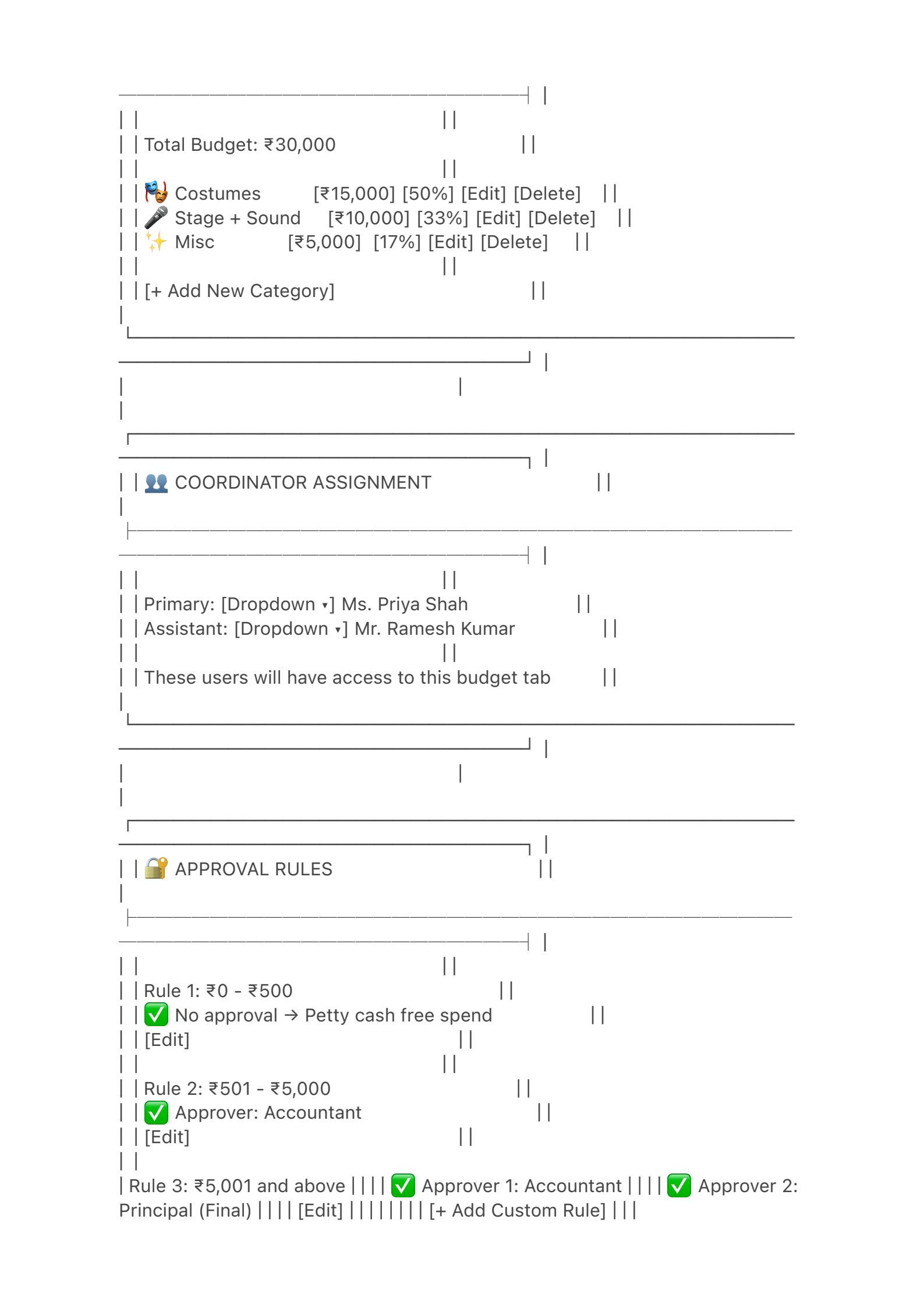
📝 7. RAISE PURCHASE REQUEST (Modal/Popup)


⚠️ This request will go through approval workflow
📦 Category *
[Dropdown ▾] Stage + Sound
💰 Amount *
[₹ 7,500]
💡 Available in category: ₹5,500
⚠️ Your request exceeds category budget
🏷️ Item/Service Name *
[LED Stage Lighting Equipment]
📝 Description *
[Professional LED lights for main stage performance.
Includes 4 moving head lights and controller.]
📎 Upload Quotation * (Required for > ₹1000)
[📁 Upload File]

```
│ │                                                    │ │
│ │ 📄 Quotation.pdf (1.2 MB) ✅ Uploaded                 │ │
│ │ [Remove]                                           │ │
│
└──────────────────────────────────────────────────────────────────────────────────────┘ │
│                                                      │
│
┌──────────────────────────────────────────────────────────────────────────────────────┐ │
│ │ 📅 Required By Date                                 │ │
│ │ [Calendar] Dec 1, 2024                              │ │
│
└──────────────────────────────────────────────────────────────────────────────────────┘ │
│                                                      │
│
┌──────────────────────────────────────────────────────────────────────────────────────┐ │
│ │ 🚨 Priority                                         │ │
│ │ ○ Normal    ● High    ○ Urgent                      │ │
│
└──────────────────────────────────────────────────────────────────────────────────────┘ │
│                                                      │
│ ℹ️ Approval Flow for ₹7,500:                            │
│    1. ✅ HOD (Auto-notified)                           │
│    2. ✅ Accountant (Auto-notified)                    │
│    3. ✅ Principal (Final approval)                    │
│                                                      │
│ [CANCEL]                                [📝 SUBMIT REQUEST]│
│                                                      │
└──────────────────────────────────────────────────────────────────────────────────────┘
```

⚙️ 8. SETTINGS TAB (Principal Only)

```
┌──────────────────────────────────────────────────────────────────────────────────────┐
│ ⚙️ BUDGET SETTINGS - Annual Day 2025                                                  │
├──────────────────────────────────────────────────────────────────────────────────────┤
│                                                      │
│
┌──────────────────────────────────────────────────────────────────────────────────────┐ │
│ │ 📊 BUDGET ALLOCATIONS                                 │ │
│
├──────────────────────────────────────────────────────────────────────────────────────
```


Total Budget: ₹30,000
🎭 Costumes [₹15,000] [50%] [Edit] [Delete]
🎤 Stage + Sound [₹10,000] [33%] [Edit] [Delete]
✨ Misc [₹5,000] [17%] [Edit] [Delete]
[+ Add New Category]
👥 COORDINATOR ASSIGNMENT
Primary: [Dropdown ▾] Ms. Priya Shah
Assistant: [Dropdown ▾] Mr. Ramesh Kumar
These users will have access to this budget tab
🔐 APPROVAL RULES
Rule 1: ₹0 - ₹500
✅ No approval → Petty cash free spend
[Edit]
Rule 2: ₹501 - ₹5,000
✅ Approver: Accountant
[Edit]
Rule 3: ₹5,001 and above
✅ Approver 1: Accountant
✅ Approver 2: Principal (Final)
[Edit]
[+ Add Custom Rule]

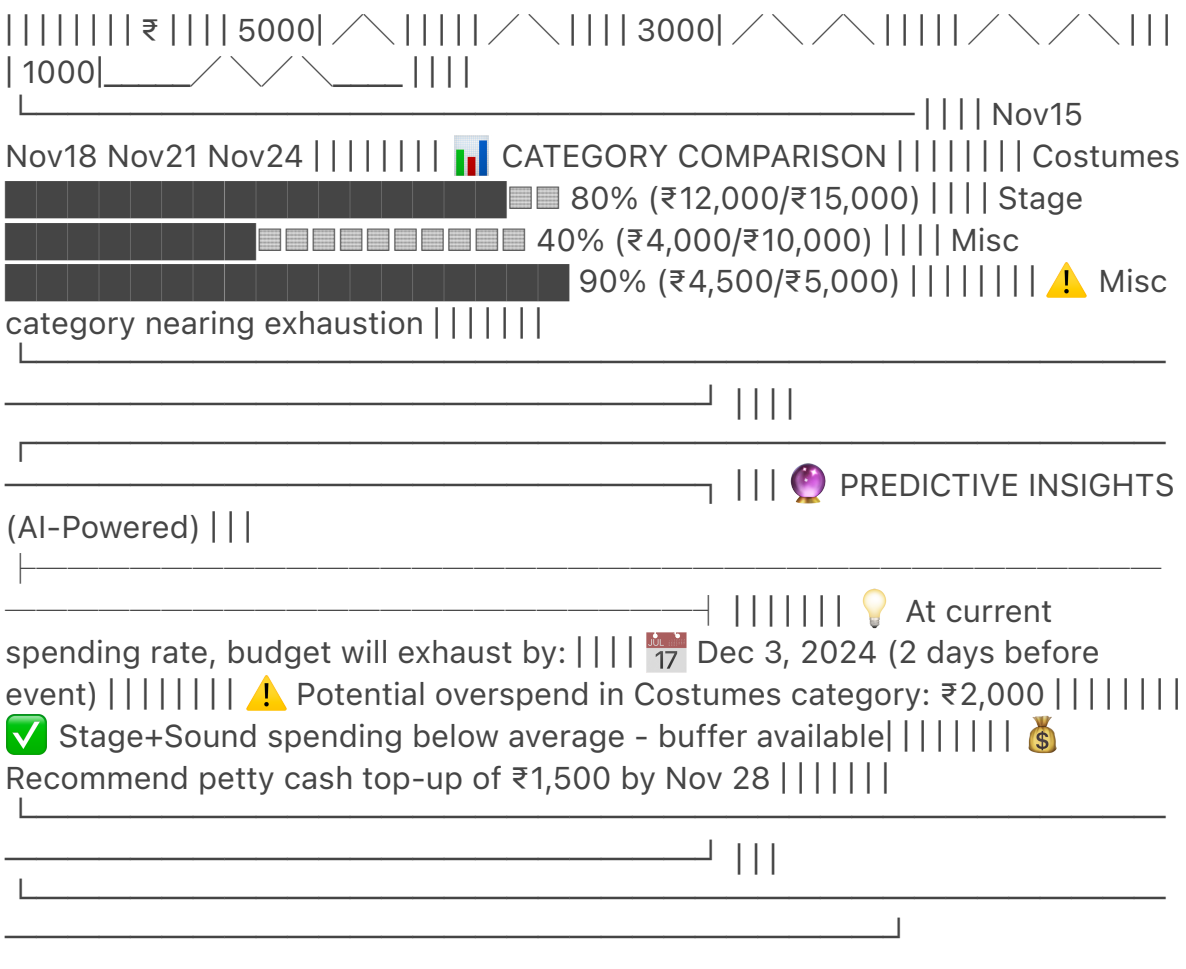
└──────────────

[View More] |
├──────┼──────────────────┼──┼──────────────────────────────────┤ |Nov | Accounts | ✅ Approved request #034 | ₹7,500 for | |25 | Mr. Joshi| | Stage lights | |14:20| | | [View More] |
├──────┼──────────────────┼──┼──────────────────────────────────┤ |Nov | Ms. Priya| 💸 Logged petty expense | ₹350 Decor | |25 | | | materials | |10:30| | | [View More] |
├──────┼──────────────────┼──┼──────────────────────────────────┤ |Nov | Ms. Priya| 📝 Raised purchase request | ₹7,500 Stage | |24 | | | lighting | |16:45| | | [View More] |
├──────┼──────────────────┼──┼──────────────────────────────────┤ |Nov | Principal| 👤 Assigned coordinator | Added Ms. | |22 | Dr. Mehra| | Priya Shah | |11:00| | | [View More] |
└──────┴──────────────────┴──┴──────────────────────────────────┘

Each action includes: • Timestamp with seconds • User name + role • IP address (backend) • Device info • Before/after values for changes
---

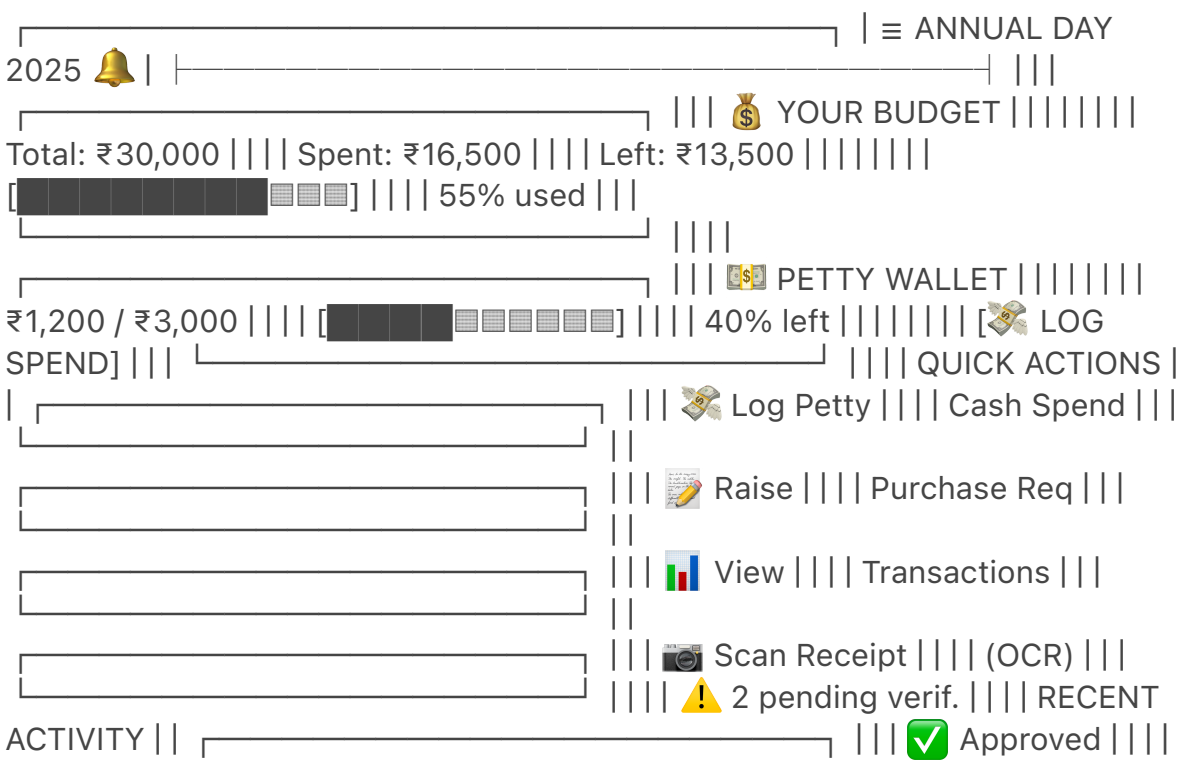
📊 **10. REPORTS TAB**

┌──┐ | 📊 REPORTS & ANALYTICS |
├──┤ | | |
┌──┐ | | | QUICK REPORT TEMPLATES | | |
├──┤ | | | | | | | 📋 Budget Summary Report | | | | Overview of allocations, spent, remaining | | | | [Generate PDF] [Generate Excel] | | | | | | | | 💸 Expense Breakdown Report | | | | Category-wise detailed expenses | | | | [Generate PDF] [Generate Excel] | | | | | | | | 💰 Petty Cash Reconciliation | | | | All petty wallet transactions with proofs | | | | [Generate PDF] [Generate Excel] | | | | | | | | ⏳ Pending Approvals Report | | | | All requests awaiting approval | | | | [Generate PDF] [Generate Excel] | | | | | | | | 📜 Complete Audit Trail | | | | Full activity log with timestamps | | | | [Generate PDF] [Generate Excel] | | | | | | | |
└──┘ | | | |
┌──┐ | | | VISUAL ANALYTICS | | |
├──┤ | | | | | | | 📈 SPENDING TREND



📱 **11. MOBILE APP VIEW (Coordinator)**

Mobile Dashboard - Simplified for Quick Actions



Stage lights | | | | ₹7,500 | | | | Nov 25, 2:20 PM | | |
└──────────────────────────────────────┘ | | |
└──┘

Mobile - Quick Log Expense (Full Screen Form)

┌──┐ | ← LOG PETTY
EXPENSE | ├──┤ | | | 💰
Wallet: ₹1,200 | | | | ┌──────────────────────────────┐ | | |
Amount (₹) * | | | | [_____] | | | | Max: ₹500 | | |
└──────────────────────────────┘ | | | |
┌──────────────────────────────┐ | | | Category * | | | | [Select ▾] |
| | └──────────────────────────────┘ | | | |
┌──────────────────────────────┐ | | | Description * | | | | [Tap to
type...] | | | | | | | | | | | └──────────────────────────────┘ | | | | 📷
Add Proof | | ┌──────────────────────────────┐ | | | 📸 CAMERA |
| | └──────────────────────────────┘ | |
┌──────────────────────────────┐ | | | 🖼️ GALLERY | | |
└──────────────────────────────┘ | | | |
┌──────────────────────────────┐ | | | Notes (optional) | | | | [Tap
to type...] | | | └──────────────────────────────┘ | | | |
┌──────────────────────────────┐ | | | 💸 SUBMIT | | | | EXPENSE
| | | └──────────────────────────────┘ | | |
└──┘

🎨 **12. COLOR SCHEME & VISUAL LANGUAGE**

Status Colors (Consistent Throughout)

🟢 GREEN (#4CAF50) • Safe zone (< 60% spent) • Approved status • Active budgets • Verified expenses
🟡 YELLOW/AMBER (#FF9800) • Caution zone (60-80% spent) • Pending approvals • Needs attention • Planning phase
🔴 RED (#F44336) • Critical zone (> 80% spent) • Rejected requests • Overbudget warnings • Urgent actions
🔵 BLUE (#2196F3) • Informational • Remaining budget • System messages • Upcoming events
⚫ GRAY (#9E9E9E) • Inactive/Closed • Archived • Disabled actions
Icon System

💰 Total Budget / Money 💸 Spent / Expenses 🎯 Remaining / Available ✅ Approved / Verified / Done ❌ Rejected / Failed ⏳ Pending / In Progress 🔔 Notifications / Alerts 📊 Reports / Analytics 📝 Requests / Forms 💵 Petty Cash 📦 Categories 👤 Users / People 📅 Dates / Timeline 📎 Attachments 🔐 Security / Permissions ⚙️ Settings 📜 Audit / History 🔍 Search 📷 Camera / Photo 📈 Trending Up 📉 Trending Down ⚠️ Warning 💡 Tips / Insights 🎭

Events (use contextual icons)

📐 **13. LAYOUT PRINCIPLES**

Information Hierarchy

LEVEL 1 (Always Visible): ├── Budget health meter ├── Total/Allocated/Spent/Remaining └── Critical alerts
LEVEL 2 (Primary Actions): ├── Main navigation tabs ├── Quick action buttons └── Active budget cards
LEVEL 3 (Detailed Views): ├── Transaction tables ├── Approval workflows └── Category breakdowns
LEVEL 4 (Supporting Info): ├── Filters and search ├── Export options └── Help/documentation
Responsive Design Rules

DESKTOP (> 1024px): ├── Side-by-side pie chart + table ├── Multi-column layouts ├── Expanded detailed views └── All features visible
TABLET (768px - 1024px): ├── Stacked layouts ├── Collapsible sections ├── Touch-optimized buttons └── Simplified navigation
MOBILE (< 768px): ├── Single column ├── Bottom navigation ├── Full-screen modals ├── Swipe gestures └── Camera-first for receipts
---

🎯 **14. KEY UX FEATURES**

Progressive Disclosure

Example: Transaction Row
DEFAULT VIEW: [Date] [Type] [Amount] [Status] [▶]
EXPANDED VIEW (Click ▶): ├── Full description ├── Category details ├── Uploaded receipts (thumbnails) ├── Approval trail ├── Notes/comments └── Action buttons
Smart Defaults & Suggestions

When logging expense: • Category: Auto-suggests based on past entries • Amount: Warns if unusual (3x average) • Description: Autocomplete from history
When raising request: • Checks available budget before submission • Suggests similar past purchases • Auto-fills vendor if repeat
Real-Time Feedback

As you type amount: ├── "₹5,000 available in this category" ✅ ├── "This will exceed budget by ₹500" ⚠️ └── "Category exhausted" ❌
As budget is consumed: ├── Progress bars update instantly ├── Color

changes at thresholds ├── Alerts trigger automatically
Error Prevention

Before submission: ├── "Are you sure? This exceeds category budget" ├── "No proof uploaded - continue anyway?" ├── "Similar request exists - view?"
During approval: ├── "Insufficient funds in category" ├── "This requires principal approval" ├── "Vendor details incomplete"

🔥 **15. SPECIAL FEATURES FOR POWER USERS**

Keyboard Shortcuts (Desktop)

Global: Ctrl/Cmd + N → New expense Ctrl/Cmd + R → New request Ctrl/Cmd + F → Search Ctrl/Cmd + E → Export current view
Navigation: 1 → Transactions tab 2 → Approvals tab 3 → Petty wallet tab 4 → Reports tab
Actions: Enter → Submit form Esc → Close modal Tab → Next field
Bulk Actions

In transaction list: □ Select multiple entries ├── Bulk verify ├── Bulk export ├── Bulk categorize └── Bulk delete (with confirmation)
Custom Views & Filters

Save filter combinations: ├── "My pending approvals" ├── "Last month expenses" ├── "High-value transactions" └── Share view URLs with team
---

📱 **16. NOTIFICATION SYSTEM**

In-App Notifications (Bell Icon)

┌───┐ | 🔔 NOTIFICATIONS (5 New) |
├───┤ | | | 🔴 URGENT (2) | | ├── Budget 90% exhausted | | | Annual Day - Act now | | | 2 mins ago | | | | | └── Approval overdue | | Request #034 - 2 days | | 5 hours ago | | | | 🟡 PENDING (3) | | ├── New purchase request | | | ₹3,500 - Costume | | | 1 hour ago | | | | | ├── Petty expense needs | | | verification | | | 3 hours ago | | | | | └── Payment completed | | ₹7,500 transferred | | Yesterday | | | | [Mark all as read] | | [Notification settings] |
└───┘

Email Digest (Daily/Weekly)

Subject: AcadionAI Budget Summary - Nov 25, 2024
🎭 ANNUAL DAY 2025 - Budget Status
💰 SNAPSHOT Total: ₹30,000 Spent: ₹16,500 (55%) 🟡 Remaining: ₹13,500

⚠️ ALERTS • Misc category at 90% - Consider reallocation • 2 approvals pending > 24 hours
✅ TODAY'S ACTIVITY • 3 petty expenses logged (₹620) • 1 purchase request approved (₹7,500) • 2 receipts verified
👉 [View Full Dashboard]
WhatsApp Integration (Optional)

AcadionAI Alert 🔔
Annual Day Budget Update
Spent: ₹16,500 / ₹30,000 (55%) Petty Wallet: ₹1,200 remaining
⚠️ New approval pending ₹8,500 - Stage lighting Requested by: Ms. Priya
[Approve] [Reject] [View Details]

🎨 **17. SAMPLE SCREENS - VISUAL MOCKUP DESCRIPTIONS**

Screen 1: Budget Health Dashboard

Visual Style: ├── Clean white background ├── Card-based layout with subtle shadows ├── Large, bold numbers for key metrics ├── Color-coded progress bars ├── Ample white space └── Material Design inspired
Screen 2: Shared Budget Tab

Visual Style: ├── Sticky header with budget name ├── Large interactive pie chart (center-left) ├── Category table (right side) ├── Floating action button (bottom-right) ├── Tab navigation below header └── Breadcrumb trail at top
Screen 3: Approval Flow

Visual Style: ├── Kanban-style cards ├── Timeline visualization for approval stages ├── Expandable card details ├── Large approve/reject buttons ├── Color-coded priority badges └── Avatar images for users
---

🚀 **18. IMPLEMENTATION RECOMMENDATIONS**

Tech Stack Suggestions

FRONTEND: ├── React.js / Next.js (Web) ├── React Native (Mobile) ├── TailwindCSS (Styling) ├── Chart.js / Recharts (Visualizations) ├── Framer Motion (Animations) └── React Query (State management)
BACKEND: ├── Node.js + Express ├── PostgreSQL (Main DB) ├── Redis (Caching) ├── S3/CloudStorage (Receipts) └── WebSocket (Real-time updates)
SPECIAL: ├── Tesseract.js (OCR for receipts) ├── PDF.js (PDF generation) ├── Socket.io (Live updates) └── Push notification service
Performance Optimization

├── Lazy load transaction history ├── Paginate large lists (50 per page) ├── Cache pie chart calculations ├── Compress uploaded images ├── Use skeleton screens for loading └── Optimize bundle size
---

🎯 **FINAL THOUGHTS**

This UI design makes budgeting:

✅ **Visual** - Every number has a color, every status has an icon
✅ **Intuitive** - No training needed, self-explanatory
✅ **Fast** - Quick actions for common tasks
✅ **Transparent** - Everyone sees what they need
✅ **Controlled** - Permissions enforced at UI level
✅ **Mobile-first** - Coordinators work on-the-go
✅ **Audit-ready** - Every action logged and visible

The key innovation is the **shared budget tab** concept - one single view that adapts based on role, eliminating confusion about "who sees what."

Would you like me to create:
1. **Figma/design file specifications**
2. **Component library documentation**
3. **User flow diagrams**
4. **Interactive prototype script**
5. **Developer handoff notes**

Just let me know! 🚀