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1.1 Owner Signup Page

Special temporary url

1. Signup Form. Fields:
   1.1. Name of organisation
   1.2. Owner first name
   1.3. Owner last name
   1.4. Owner email (preferably professional)
   1.5. Create password
   1.6. Confirm password
2. Signup Button: “CREATE ACCOUNT”

If successful, takes user to **1.2** login screen

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

1.2 CSR Login Screen

Main Url of CSR Platform

1. We will put some nice content on here. Make it look good
2. Login Form. Fields:
   2.1. email
   2.2. password
   2.3. Forgot Password
3. Login Button: “LOGIN”

Initiates forgot password flow: where user enters email; then password reset link is sent to email, then they are taken to a secure page to enter their new password

If successful, logs user in and takes them to **6.0** my tasks page

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

1.3 My Profile Details/ Edit

Header > Top Right Name + Photo Icon > Here

1. This is the user's profile page wherein they can check their details and edit them.
2. First Name + Last Name
   Edit Name
3. Profile Picture
   Add/Edit Photo
4. Email Address
5. Phone Number
   Add/Edit Phone Number
6. Password
   Change Password
7. User Type
8. Donor
9. Logout Button (with confirmation popup)

Allows user to edit name and update saved name

Allows user to upload a photo from their computer

Allows user to edit their phone number

Allows user to change their password - they have to enter old password correctly before choosing a new one

Shows a confirmation popup before logging the user out and taking them to **1.2** login screen

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

Takes owner to **2.1.2** Donor detail page

Takes owner to **2.1.1** create donor page

Design needs some thinking.

2.1 Manage Organisation

Main Menu > Account > Here

1. Details of the Organisation
   1.1. Name
   1.2. Short Name
   1.3. Logo
2. Donors
   2.1. *Table*: List of donors
   Columns: Name, Code, Budget (current year), Allocated, Disbursed, Remaining amount
   Actions:
   View/Edit Donor
   2.2. Create Donor
3. Categories (admin can choose which categories and sub categories it prefers to fund and whether those categories are required or not)
   Save Changes
4. Geographies (The organisation chooses States and Districts that they prefer working in, and whether proposals are required to be within those areas or not)
   Save Changes

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

Creates donor and takes admin to **2.1.2** the donor detail page for this newly created donor

2.1.1	Create Donor Company

Main Menu > Account > Organisation > Here

1. Form to create Donor Company
   1.1. Legal name of the donor
   1.2. Acronym (code) of the donor
2. Create Donor

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

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Allows admin to edit any field EXCEPT FOR CODE for this donor.

Allows admin to change the amount for a particular year

Allows admin to add a new financial year with budget for a particular donor

2.1.2	Donor Details/Edit

Main Menu > Account > Organisation > Here

1. Donor Details
   1.1. Legal Name
   1.2. Code
   1.3. Logo(s)/Artwork
   1.4. Social Media Handles
   1.5. PAN Number
   1.6. [PAN Card]
   1.7. Registered Address
   1.8. Name of Signatory
   1.9. Edit Donor
2. Donor Budget
   2.1. *Table: Shows Donor Budget for each year*
   Columns: Year, Budget, Amt allocated, Amt Disbursed, amount pending
   Actions:
   Edit Budget
   2.2. Add a Budget

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

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Allows admin to edit the name, code and default user of a usertype

After a confirmation popup, allows user to deactivate a usertype

Opens a popup (or box within the page) to add a usertype

Goes to **2.2.2** view/edit user page

Goes to **2.2.1** add user page

2.2 Manage Users

Main Menu > Account > Here

1. User Types
   1.1. Table of user types
   Columns: Name, Number of users, Default User
   Actions:
   Edit Usertype
   DeActivate Usertype
   1.2. Add a Usertype
2. Users
   2.1. *Table*: List of users
   Columns: Name, email, userType, join Date, Last Login
   Actions:
   View/Edit User
   2.2. Add a User

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

2.2.1 Create a User

Main Menu > Account > Users > Here

1. Form to add a user
    1.1. First Name Last Name (Required)
    1.2. Email Address (Required)
    1.3. Phone Number (Optional)
    1.4. Select User Type (Required)
    1.5. Select a Donor (Optional)
2. Create User

Creates the user and returns the admin to **2.2** user management page

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

Allows admin to change usertype of a user

Allows admin to add/edit/remove donor of this user

After a confirmation popup, allows user to deactivate a user

2.2.2 User Details/Edit

Main Menu > Account > Users > Here

1. Allows admin to view and edit a user
   1.1. First Name + Last Name
   1.2. Profile Photo
   1.3. Email Address
   1.4. Phone Number
   1.5. User Type
   Edit User Type
   1.6. Donor
   Edit Donor
2. Deactivate user

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

2.3 Green Channel Requests

Main Menu > Account > Here

1. Tabs for New, Granted, Rejected
2. *Table: List of all green channel requests*
3. *Filters:*
   3.1. Search Box
4. *Columns (sorting available on all columns):*
   4.1. NGO Name
   4.2. Proposal Name
   4.3. Requested By Name
   4.4. Requested At
5. *Actions*:
   Approve/Grant
   Reject

Approves green channel request for this proposal. Notifies ngo of the same.

Rejects green channel request for this proposal (after showing a confirmation popup). Notifies ngo of the same.

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

2.9 My Tasks

Main Menu > Here

1. *Table: List of tasks where user is assignee*
2. *Filters:*
   2.1. Status
   2.2. Search Box
3. *Columns (sorting available on all columns):*
   3.1. Task Name
   3.2. Proposal Name
   3.3. NGO Name
   3.4. Assigned On
   3.5. Due Date
   3.6. Status
4. *Action*:
   Go to Task

Takes user to the relevant task detail page for this task

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

Links to task manager filtered for all tasks of this assignee

Opens popup to select a new assignee (lateral users shown) for this task

2.9.2 Task Detail Page

Main Menu > My Tasks > Here

1. Each task has its own specific detail page
2. Common among all task pages is:
   2.1. Name of the task shown on top of the page
   2.2. Due date of task
   2.3. Clickable name of assignee of this task
   2.4. Change Assignee
   2.5. If status of task is “Needs Revision” then box is shown with details of changes requested as will as who requested the revision

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

2.9.1	Task Manager

Main Menu > Here

1. *Table: List of all tasks*
2. *Filters:*
   2.1. Status
   2.2. Assignee
   2.3. Search Box
3. *Columns (sorting available on all columns):*
   3.1. Task Name
   3.2. Proposal Name
   3.3. NGO Name
   3.4. Assigned to
   3.5. Assigned On
   3.6. Due Date
   3.7. Status
4. *Actions:*
   Go to Task
   Change Assignee
   Change Due Date

Will only see tasks belonging to entities for which they are the focal point

Takes user to the relevant task detail page for this task

Opens popup to select a new assignee for this task

Opens popup to select a new due date for this task

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

3.0	NGO (Listing Page)

Main Menu > Here

1. Tabs for New/In Review; Approved; Rejected
2. *Table: List of NGOs*
3. *Filters:*
   3.1. Status
   3.2. Focal Point
   3.3. Search Box
4. *Columns (sorting available on all columns):*
   4.1. NGO Name
   4.2. NGO Status
   4.3. No. of Processing Proposals
   4.4. No of Unapproved Proposals
   4.5. Live Projects
   4.6. Date of First Submission
   4.7. Focal Point
5. *Action:*
   View NGO

Will only see ngos for which they are the focal point

Goes to **3.1** NGO detail page

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

Takes user to the relevant task detail page for this task

3.1	NGO Detail Page [1]

Main Menu > NGO Listing > Here

1. Brand Name of NGO and Logo
2. Current Task (only shown if there is a current pending task for this NGO)
   Name, assignee, due date of the current task
   Go to task
3. NGO Overview
   3.1. Website
   3.2. Nature of Operations
   3.3. Organization scale table (staff experience, geographical reach, beneficiary reach)
   3.4. Contact Person Details
4. *Legal Details*
   4.1. Legal Name
   4.2. Registration Details:
      4.2.1. Date, Type, State, Number, Address [certificate, MoA]
   4.3. 12A Certification:
      4.3.1. Number, Date, expiry, cancellation?
   4.4. PAN Number [soft copy]
   4.5. TAN Number [proof]
   4.6. 80G Details
      4.6.1. Number, Date, expiry [proof, government website screenshot proof]
   4.7. Other Tax Exemptions [proof]
   4.8. EPF Number [filings]
   4.9. Professional Tax Number [filings]
   4.10. Offices
   4.11. Certifications (with details) [proof]
5. Other Details
   5.1. Linkages (partnerships)with details
   5.2. Organizational Structure [organogram]
   5.3. Governing Body (no of members, table with details)

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

3.1	NGO Detail Page [2]

Main Menu > NGO Listing > Here

6. Staff/Finance Management
    6.1. Budget (with tables)
    6.2. Donor details (with table)
    6.3. Number of employees - direct, contract, part-time
    6.4. Salary of Senior Leadership (with table of details)
    6.5. Staff Breakup (with Table)
    6.6. Part Time Staff (with Table)
    6.7. Vehicles & other assets (with table)
    6.8. Foreign Travel at institutional expense (with table)
    6.9. Financial statements and income tax returns
    6.10. Bank Template (sample supplied by us to be filled)
    6.11. GST (certificate, if none, then exemption letter)
    6.12. Cancelled Cheque
    6.13. Name as per bank????????
7. Policies [Handbook/document]
    7.1. Sexual harassment
    7.2. Whistleblower
    7.3. Child protection
    7.4. Other (with details)
    7.5. Travel Policy
    7.6. Salary Policy
    7.7. Recruitment Policy
    7.8. Accounting & Audit Policy
    7.9. Credibility Alliance Report

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

3.1	NGO Detail Page [3]

Main Menu > NGO Listing > Here

8. NGO Eligibility Criteria
    8.1. Tax exemption percentage
    8.2. Focus Areas
    8.3. Annual Reports? (with last few reports)
    8.4. Previous Bajaj Funding? (with details)
    8.5. Bajaj Awards? (with details)
    8.6. National/International Awards? (with details)
    8.7. Geographies where they operate
    8.8. Litigation, Blacklists and Violations
    8.9. Affiliations (political/religious, senior bajaj company/family members involved in the ngo, senior NGO people involved in bajaj)
9. Proposals
    9.1. Table: with the proposal list
    Columns: Name, Submission Date, status
    Action
    View Proposal
10. Projects
    10.1. Vendor Code
    10.2. Table: with the project list of this ngo
    Columns: Name, startDate, status
    Action View Project
11. Review Data - desk review details and outcome
12. Activity
    All tasks conducted on the NGO in a Timeline view Shown in reverse chronological order. For each task the name of task, person who completed the task, time of completion is shown
13. Managers
    13.1. Fields: designation, usertype, user
    13.2. Designations: Focal point, Reviewer, Approver
    13.3. Edit Users

Goes to **4.1** proposal detail page

Goes to **5.1** project detail page

Allows admin to reassign the main usertypes and users associated with an NGO

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

Remaining Desk Review questions are opened

Remaining questions not shown. User can now save/submit the task

3.2.1 NGO Desk Review [1]

My Tasks/NGO Details > Here

1. This is the form where NGO eligibility is defined
2. Is a desk review required?
    2.1. Yes
    2.2. No
3. If Yes, Rest of the form is split into 3 sections:
4. Credibility:
    4.1. Part of the rating organisation
    4.2. References
    4.3. Leadership Quality
    4.4. Recognition and Awards
    4.5. Linkages
5. Capability
    5.1. Management Capability
    5.2. Geographical Reach
    5.3. Beneficiary Reach
    5.4. Past experience
    5.5. Existing presence in the project area
6. Proposal Quality
    6.1. Geography overlap with Donor
    6.2. Category overlap with donor
    6.3. Quality with which proposal defined the problem
    6.4. How robust is their solution
    6.5. How clear are their outcomes
    6.6. How is their M&E plan
    6.7. Proposal budget in comparison to NGO budget
    6.8. Is there a contribution plan from the beneficiaries
    6.9. Is there a sustainability plan for the project

I have set it so the deskreviewer isn't directly sending a rejection email to the NGO

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

Saving just saves the data entered by user. User stays on the page.

Submit marks task as complete, moves NGO to **3.2.2** Desk review Approval and returns user to **2.9** “my tasks”

3.2.1	NGO Desk Review [2]

My Tasks/NGO Details > Here

7. Summary of results
8. Overall Summary
9. Documents: [proof of 80G, Desk Review Doc, Financial Review Doc]
10. Field Visit Questions
11. Recommendation (yes/No, with paragraph details)
12. Save
13. Submit

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

3.2.2 Desk Review Approval

My Tasks/NGO Details > Here

1. Left column will have the details of 3.2.1 NGO Desk Review
2. Right column will have the steps involved in approval
   2.1. First box decides if task was done satisfactorily
      2.1.1. Yes
      2.1.2. No
   2.2. If yes, now decide what to do about the NGO/Proposal
      2.2.1. Approve NGO and initiate proposal review process for proposal
      2.2.2. Request Revision of NGO/Proposal details with a paragraph stating what needs to be revised
      2.2.3. Recommend for Rejection with a paragraph stating reasons for recommendation.
      2.2.4. Reject NGO/Proposal outright with a paragraph stating reasons for rejection.
   2.3. Submit

Next set of questions (2.2) become visible

Previous task (3.2.1) is reopened and reassigned to the person who completed it (with details)

NGO is marked as approved, PRP for ngo is initiated

Email is sent to NGO, and entity revision request is shown to this ngo with details. User goes back to **2.9** my tasks page

Proposal status becomes recommended for rejection, and proposal is taken straight to **4.2.5** Board review stage. User goes back to **2.9** My tasks page

pre-formatted rejection email is sent to this ngo - with details on why. NGO platform also updated. User goes back to **2.9** My tasks page

Submit marks task as complete, does the action depending on the choices the user made in the form, and returns user to **2.9** “my tasks”

is focal point authorized to do this? Otherwise will only show it if the approver/assignee of the task is of level LeadAdmin or higher

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 2

Saving just saves the data entered by user. User stays on the page.

Submit marks task as complete, moves NGO to **3.2.2** NGO Decision and returns user to **2.9** “my tasks”

3.2.1 NGO Review

My Tasks/NGO Details > Here

1. This is the form where NGO is reviewed.
2. Form fields:
    2.1. Review Details
3. Save
4. Submit

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 2

NGO is marked as approved and PRP is initiated for proposal that was submitted

NGO and Proposal are BOTH marked as rejected on both platforms. User goes back to **2.9** My tasks page

Submit marks task as complete, does the action depending on the choices the user made in the form, and returns user to **2.9** “my tasks”

3.2.2	NGO Decision

My Tasks/NGO Details > Here

1. Form with options
   1.1. Approve NGO and initiate proposal review
   1.2. Reject NGO/Proposal outright with a paragraph stating reasons for rejection.
2. Submit

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

4.0	Proposals (Listing Page)

Main Menu > Here

1. Tabs for New/In Review; Approved; Rejected
2. *Table: List of Proposals*
3. *Filters:*
   - *3.1.* Status
   - 3.2. Focal Point
   - *3.3.* Search Box
4. *Columns (sorting available on all columns):*
   - *4.1.* Proposal Name
   - 4.2. NGO Name
   - *4.3.* Proposal Status
   - *4.4.* Date of Submission
   - 4.5. Focal Point
5. *Action*:
   View Proposal

Goes to **4.1** Proposal detail page

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

Takes user to the relevant task detail page for this task

Takes user to **3.1** ngo details page

4.1 Proposal Details [1]

Main Menu > Proposals > Here

1. Proposal Title, NGO Name, Status, Focal Point
2. Current Task (only shown if there is a current pending task for this Proposal)
   Name, assignee, due date of the current task
   Go to task
3. Ngo Details
   3.1. Name (links to NGO detail Page)
   3.2. Status
4. *Proposal Overview*
   4.1. Title
   4.2. Focus Area
   4.3. Beneficiary categorisation (with table)
   4.4. geographies
   4.5. Start Date (time till start)
   4.6. End Date (duration)
   4.7. Local Address
   4.8. Contact Person Details
   4.9. Executive Summary (large paragraph)
   4.10. Key activities (in table format)
5. Proposal Details [M&E Document]
   5.1. History of organisation with proposed type work and in proposed area
   5.2. Beneficiary identification, targeting and role
   5.3. Problem Statement
   5.4. Solution created by proposal
   5.5. Outcomes & impact assessment
   5.6. Sustainability Plan
   5.7. [Other proposal related documents]

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

4.1	Proposal Details [2]

Main Menu > Proposals > Here

6. Budgeting
   6.1. Total Funds for project
   6.2. Total funds from bajaj
   6.3. Source of balance funds (in table format?)
   6.4. [Budget File]

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

Email is sent to NGO, and proposal revision request is shown to this ngo with details. User goes back to **2.9** my tasks page

Project status becomes recommended for rejection, and proposal is taken straight to **4.2.5** Board review stage. User goes back to **2.9** My tasks page

Marks task as complete and creates next task in the processing of this proposal (**4.2.2** Field Visit)

4.2.1 Begin Proposal Processing

My Tasks/Proposal Details > Here

1. 3 options for how to proceed
   1.1. Approve Proposal for review to move ahead to next task
   1.2. Request Revision of NGO/Proposal details with a paragraph stating what needs to be revised
   1.3. Recommend for Rejection with a paragraph stating reasons for recommendation.
2. If proposal approved for review:
   2.1. Update Project Title
   2.2. Assign FP, Field Agent, Approver, etc (default values pre-assigned wherever possible)
3. Initiate Field Visit

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

Saving just saves the date entered by user. User stays on the page.

Submit marks task as complete, moves proposal to **4.2.2.1** Field Visit Approval, and returns user to **2.0** “my tasks”

4.2.2 Field Visit

My Tasks/Proposal Details > Here

1. Should we give access to the proposal they sent us on this page?
2. Static text: NGO name, Proposal name, proposal ID
3. Fields to fill in
    3.1. Actual reviewer
    3.2. Date of visit
    3.3. Persons met (table entry)
    3.4. Registration and certificates verified
    3.5. Locations visited (table entry)
    3.6. Visit duration
    3.7. Recommended?
    3.8. Comments on organisation
    3.9. Comments on stakeholders/beneficiaries
    3.10. Comments on project
    3.11. Overall comments
    3.12. Document [Field Visit Report]
    3.13. Photographs [multiple file upload]
4. Save
5. Submit Report

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

Next set of questions (2.2) become visible

Previous task (4.2.2) is reopened and reassigned to the person who completed it (with details)

Proposal is taken to the next step in the PRP **4.2.3** Leadership Engagement

Email is sent to NGO, and entity revision request is shown to this ngo with details. User goes back to **2.9** my tasks page

Proposal status becomes recommended for rejection, and proposal is taken straight to **4.2.5** Board review stage. User goes back to **2.9** My tasks page

Submit marks task as complete, does the action depending on the choices the user made in the form, and returns user to **2.9** "my tasks"

4.2.2.1 Field Visit Approval

My Tasks/Proposal Details > Here

1. Left column will have the details of 4.2.2 Field Visit
2. Right column will have the steps involved in approval
   2.1. First box decides if task was done satisfactorily
      2.1.1. Yes
      2.1.2. No
   2.2. If yes, now decide what to do about the Proposal
      2.2.1. Approve Proposal to move ahead to next task
      2.2.2. Request Revision of Proposal details with a paragraph stating what needs to be revised
      2.2.3. Recommend for Rejection with a paragraph stating reasons for recommendation.

   2.3. Submit

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

Task is marked as approved, proposal moves to next step in the process (**4.2.4** SC Review)

Email is sent to NGO, and proposal revision request is shown to this ngo with details. User goes back to **2.9** my tasks page

Project status becomes recommended for rejection, and proposal is taken straight to **4.2.5** Board review stage. User goes back to **2.9** My tasks page

Submit marks task as complete, does the action depending on the choices the user made in the form, and returns user to **2.9** “my tasks”

4.2.3 Leadership Engagement

My Tasks/Proposal Details > Here

1. We can put whatever we want here. We should at least have one summary input box. But we can also enter more specific things
2. 3 options for how to proceed
   2.1. Approve Proposal to move ahead to next task
   2.2. Request Revision of NGO/Proposal details with a paragraph stating what needs to be revised
   2.3. Recommend for Rejection with a paragraph stating reasons for recommendation.
3. Submit

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

4.2.4 SC Review

My Tasks/Proposal Details > Here

1. We can put whatever we want here. We should at least have one summary input box. But we can also enter more specific things
2. Some field options
   2.1. Meeting date
   2.2. SC comments
   2.3. Recommended duration?????
3. 3 options for how to proceed
   3.1. Approve Proposal to move ahead to next task
   3.2. Request Revision of NGO/Proposal details with a paragraph stating what needs to be revised
   3.3. Recommend for Rejection with a paragraph stating reasons for recommendation.
4. Submit

Task is marked as approved, proposal moves to next step in the process (**4.2.5** Board Approval)

Email is sent to NGO, and proposal revision request is shown to this ngo with details. User goes back to **2.9** my tasks page

Project status becomes recommended for rejection, and proposal is taken straight to **4.2.5** Board review stage. User goes back to **2.9** My tasks page

Submit marks task as complete, does the action depending on the choices the user made in the form, and returns user to **2.9** “my tasks”

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

4.2.5 Board Review & Final Approval

My Tasks/Proposal Details > Here

1. We can put whatever we want here. We should at least have one summary input box. But we can also enter more specific things
2. Fields to fill out
   2.1. Meeting date
   2.2. Comments
3. 3 options for how to proceed
   3.1. Approve Proposal
   3.2. Request Revision of NGO/Proposal details with a paragraph stating what needs to be revised
   3.3. Reject NGO/Proposal outright with a paragraph stating reasons for rejection
4. If approved, Fields to fill out
   4.1. Donor Selection
   4.2. Amount to give
   4.3. Focal Point of project
   4.4. [Final Approval Sheet]
5. Save
6. Submit

Email is sent to NGO, and proposal revision request is shown to this ngo with details. User goes back to **2.9** my tasks page

Pre-formatted rejection email is sent to this ngo - with details on why. NGO platform also updated. User goes back to **2.9** My tasks page

Saving just saves the date entered by user. User stays on the page.

Action is taken as per user choices. If proposal was approved then, proposal is marked as approved, ngo is informed, live project is created for this proposal. moves to first step in live project setup **5.2.1** project documents. User goes back to **2.9** my tasks

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 2

Saving just saves the data entered by user. User stays on the page.

Marks task as complete and creates next task in the processing of this proposal (**4.2.2** Final Review)

4.2.1 Proposal Initial Review

My Tasks/Proposal Details > Here

1. This is the form where proposal is first reviewed.
2. Form with fields:
    2.1. Review Details
    2.2. Radio button for whether the proposal is recommended for approval or not
3. Save
4. Submit

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 2

Proposal is marked as approved, project is created.

Proposal is rejected. Proposal status on both platforms updated. User goes back to **2.9** My tasks page

Submit marks task as complete, does the action depending on the choices the user made in the form, and returns user to **2.9** “my tasks”

4.2.2	Proposal Final Review

My Tasks/Proposal Details > Here

1. User decides what to do about the Proposal
   1.1. Approve Proposal and create project
   1.2. Reject NGO/Proposal
2. Submit

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

5

Live Projects (Listing Page)

Main Menu > Here

1. Tabs for Live; Completed
2. *Table: List of Projects*
3. *Filters:*
    3.1. Status
    3.2. Donor
    3.3. Focal Point
    3.4. Search Box
4. *Columns (sorting available on all columns):*
    4.1. Project Name
    4.2. NGO Name
    4.3. Project Status
    4.4. Start Date
    4.5. End Date
    4.6. Focal Point
5. *Action*:
    View Project

Goes to **5.1** Project detail page

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

Takes user to the relevant task detail page for this task

Takes user to **3.1** ngo details page

Takes user to **4.1** proposal details page

Project document(s) can be uploaded/updated/replaced here itself

5.1 Project Details [1]

Main Menu > Project Listing > Here

1. Project Title, status, focal Point
2. Current Task (only shown if there is a current pending task for this Project)
   Name, assignee, due date of the current task
   Go to task
3. Ngo Details
   3.1. Name
   3.2. Status
4. *Proposal Details*
   4.1. Title
   4.2. Focus Area
   4.3. Beneficiary categorisation (with table)
   4.4. geographies
   4.5. Start Date (time till start)
   4.6. End Date (duration)
   4.7. Local Address
   4.8. Contact Person Details
   4.9. Executive Summary (large paragraph)
   4.10. Key activities (in table format)
5. Project Details
   5.1. Start Date
   5.2. End Date
   5.3. MoU
   5.4. Maybe More
   5.5. Update Details

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

5.1 Project Details [2]

Main Menu > Project Listing > Here

6. Donor(s)
   6.1. Total Budget
   6.2. Total Disbursed/Pending
   6.3. Table: with the donor list
      6.3.1. Columns: Name, Allocated Amount, Disbursed, Pending, vendor code
      6.3.2. *Action*
         Edit Donor
         Generate Vendor Code
   6.4. Add Donor to Project
7. Cycles
   7.1. Total Number
   7.2. Current Cycle
   7.3. Table: Cycle List
      7.3.1. Columns: Number, Start Date, Payment Date, Status
      7.3.2. Action
         View Cycle
   7.4. Add Cycle to Project
8. Additional Documents (for uploading miscellaneous documents associated with the project)
   8.1. [Any number of documents of any type]

Opens a popup where user can enter the vendor code and edit the allocated amount associated with that donor (new amount has to be >= disbursed amount)

Sends the vendor code request email with relevant documents attached.

Opens a popup to add a new donor + allocated amount to a project

Takes user to **5.2** cycle details page

Opens a popup/page to add a new cycle to this project

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

Takes user to the relevant task detail page for this task

Sends vendor code generation email with required content attachments

Allows user to edit any cycle details including which ngo and csr document types are required for this cycle as well as donor and amount details if relevant

5.1.1 Cycle Details

Main Menu > Project Listing > Project Details > Here

1. Project Title, Cycle Num, cycle status
2. Current Task (only shown if there is a current pending task for this Project)
   Name, assignee, due date of the current task
   Go to task
3. Cycle Details
   - 3.1. Start Date
   - 3.2. Payment?
   - 3.3. NGO Docs (show list of docs required from ngo - show actual documents wherever present)
   - 3.4. CSR Docs (show list with actual docs wherever present
4. If Payment present then show Payment Details Box:
   - 4.1. Donor
   - 4.2. Amount
   - 4.3. Vendor Code (if it is available)
     - 4.3.1. Request Vendor Code (If no vendor code exists)
   - 4.4. [All NGO Payment Docs]
   - 4.5. [Payment Proof]
   - 4.6. [Payment 80G Receipt]
5. Edit Cycle (Only shown if cycle hasn't been completed)

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

5.2.1	Project Documents

My Tasks/Project Details > Here

1. Show Basic Project Details
2. Fields:
   2.1. [Signed MoU]
   2.2. Start Date
   2.3. End Date
3. Box with donor details. For each donor, show:
   3.1. Donor
   3.2. Amount
   3.3. Vendor Code (if it is available)
   3.4. Request Vendor Code (If no vendor code exists)
4. Done

Sends vendor code generation email with required content and attachments

marks task as complete and moves project to next step in the process (5.2.2 Create Reporting Schedule) and returns user to **2.9** “my tasks”

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

Marks task as complete creates all the required cycles and moves project to next step in the process (5.3.2 Focal Point review - first step in the first reporting cycle) and returns user to **2.9** “my tasks”

5.2.2 Create Reporting Schedule

My Tasks/Project Details > Here

1. Show basic project details
2. Cycles entered one by one. Some are pre-created on the page based on default rules. Pre-created ones can be modified/deleted. Each cycle entry form will have fields:
   - 2.1. Date
   - 2.2. Payment? (if yes, then fields:
     - 2.2.1. donor
     - 2.2.2. Amount
     - 2.2.3. NGO Payment Documents (Select List)
   - 2.3. NGO Documents (Select List)
   - 2.4. CSR Documents (Select List)
   - 2.5. [reporting schedule can optionally be uploaded as an excel]
3. Done

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

Sends vendor code generation email with required content attachments

Create new notification for ngo for relevant missing docs

marks task as complete. Checks for more cycles in project. If yes then moves project to first task in next cycle (**5.3.2** Focal Point Review); If none then mark project as complete. Returns user to **2.9** “my tasks”

Sends relevant payment disbursement request email with relevant content and attachments

Marks task as complete and moves project to next task in cycle (**5.3.3** Payment Confirmation). Returns user to **2.9** “my tasks”

5.3.2 Focal Point Review

My Tasks/Project Details/Cycle Details > Here

1. Basic Project Details
2. Basic Cycle details
    2.1. Date
    2.2. Payment?
    2.3. If Payment:
        2.3.1. Donor
        2.3.2. Amount
        2.3.3. Vendor Code (if it is available)
        2.3.4. Request Vendor Code (If no vendor code exists)
3. Box with ngo Docs for this cycle
    3.1. Nudge NGO (Only if any required NGO docs are not present)
4. If payment present then box with NGO payment docs for this cycle
    4.1. Nudge NGO (Only if any required NGO payment docs are not present)
5. Box with fields to upload all the csr docs for this cycle (if any documents already exist, show them here)
6.
7. If cycle does NOT require a payment, show button
    7.1. Mark cycle as complete
8. If cycle DOES require a payment, show button
    8.1. Send Payment Disbursement Request
    8.2. Done

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

5.3.3	Payment Confirmation

My Tasks/Project Details/Cycle Details > Here

1. Basic Project Details
2. Basic Cycle details
   2.1. Date
   2.2. Donor
   2.3. Amount
   2.4. Vendor Code
3. Form with fields:
   3.1. Some payment details TBD
   3.2. [Proof of Payment]
4. Done

marks task as complete and moves project to next step in the process (**5.3.4** Cycle Completion) and returns user to **2.9** "my tasks"

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 1

Create new notification for ngo for missing payment receipt doc

marks task as complete. Checks for more cycles in project. If yes then moves project to first task in next cycle (**5.3.2** Focal Point Review); If none then mark project as complete. Returns user to **2.9** “my tasks”

5.3.4 Cycle Completion

My Tasks/Project Details/Cycle Details > Here

1. This task has no fields to be entered
2. Basic Project Details
3. Basic Cycle details
    3.1. Date
    3.2. Donor
    3.3. Amount
    3.4. Payment details TBD
    3.5. [Proof of Payment]
4. Box with ngo GST receipt for this payment
    4.1. Nudge NGO (Only if doc is not present)
5. Mark Cycle as Complete

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 2

5.2.1	Project Cycle Creation

My Tasks/Project Details > Here

1. Show Basic Project Details
2. Fields:
   2.1. [Signed MoU]
   2.2. Start Date
   2.3. End Date
3. Box with donor details. For each donor, show:
   3.1. Donor
   3.2. Amount
4. Box to create cycles one by one. Some are pre-created on the page based on default rules. Pre-created ones can be modified/deleted. Each cycle entry form will have fields:
   4.1. Date
   4.2. Payment? (if yes, then fields:
      4.2.1. donor
      4.2.2. Amount
      4.2.3. NGO Payment Documents (Select List)
   4.3. NGO Documents (Select List)
   4.4. CSR Documents (Select List)
   4.5. [reporting schedule can optionally be uploaded as an excel]
5. Submit

marks task as complete, creates cycles, and moves project to next step in the process (5.2.2 Cycle Assessment) and returns user to **2.9** “my tasks”

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 2

5.3.1 Cycle Assessment

My Tasks/Project Details/Cycle Details > Here

1. Basic Project Details
2. Basic Cycle details
    2.1. Date
    2.2. Payment?
    2.3. If Payment:
        2.3.1. Donor
        2.3.2. Amount
3. Box with ngo Docs for this cycle
    3.1. Nudge NGO (Only if any required NGO docs are not present)
4. If payment present then box with NGO payment docs for this cycle
    4.1. Nudge NGO (Only if any required NGO payment docs are not present)
5. Box with fields to upload all the csr docs for this cycle (if any documents already exist, show them here)
6. Radio button for whether the payment should be sent or not (if not, why)
7. Submit

Create new notification for ngo for relevant missing docs

Marks task as complete and moves project to next task in cycle (**5.3.2** Cycle Completion). Returns user to **2.9** “my tasks”

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

CSR

ORGANISATION 2

5.3.2	Cycle Completion

My Tasks/Project Details/Cycle Details > Here

1. Basic Project Details
2. Basic Cycle details
   2.1. Date
   2.2. Donor
   2.3. Amount
   2.4. Details from 5.3.1 Cycle Assessment
3. Form with fields:
   3.1. Whether payment was done or not (if payment not done, set disbursed amount as 0)
   3.2. [Proof of Payment]
4. Mark Cycle as Complete

marks task as complete. Checks for more cycles in project. If yes then moves project to first task in next cycle (**5.3.1** Cycle Assessment); If none then mark project as complete. Returns user to **2.9** "my tasks"

	ALL CSR
	Owner
	LeadAdmin
	FocalPoint of entity
	Approver of Task
	Assignee of Task
	Auditor

NGO

1.1 NGO Signup Page

Homepage url of NGO Platform > Here

1. Signup Form. Fields:
   1.1. Name of superNGO
   1.2. Legal Name of (preferably parent) entity in NGO
   1.3. Owner first name
   1.4. Owner last name
   1.5. Owner email (preferably professional)
   1.6. Create password
   1.7. Confirm password
2. Signup Button: "CREATE ACCOUNT"

If successful, takes user to **2.2** Setup Entity Screen

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

Initiates forgot password flow: where user enters email; then password reset link is sent to email, then they are taken to a secure page to enter their new password

If successful, logs user in and takes them to **5.1** notifications page

1.2

NGO Login Page

Homepage url of NGO Platform > Here

1. We will put some nice content on here. Make it look good
2. Login Form. Fields:
   2.1. email
   2.2. password
   2.3. Forgot Password
3. Login Button: “LOGIN”

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

Goes to **1.3.2** view/edit user page

Goes to **1.3.1** add user page

1.3 Manage Users

Main Menu > Here

1. List of Users
    1.1. *Table*: List of users
    Columns: Name, email, userType, join Date, Last Login
    Actions:
    View/Edit User
    1.2. Add a User

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

1.3.1 Create User

Main Menu > Manage Users > Here

1. Form to add a user
    1.1. First Name Last Name (Required)
    1.2. Email Address (Required)
    1.3. Phone Number (Optional)
    1.4. Select User Type (Required)
    1.5. Select an Entity (Optional)
2. Create User

Creates the user and returns the admin to **1.3** user management page

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

1.3.2 View/Edit User

Main Menu > Manage Users > Here

1. Allows owner to view and edit a user
    1.1. First Name + Last Name
    1.2. Profile Photo
    1.3. Email Address
    1.4. Phone Number
    1.5. User Type
    Edit User Type
    1.6. Entity
    Edit Entity
2. Deactivate user

Allows admin to change usertype of a user

Allows admin to edit/remove entity of this user

After a confirmation popup, allows owner to deactivate a user

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

Allows user to edit name and update saved name

Allows user to upload a photo from their computer

Allows user to edit their phone number

Allows user to change their password - they have to enter old password correctly before choosing a new one

Shows a confirmation popup before logging the user out and taking them to **1.2** login screen

1.4 My Profile Details/ Edit

Header > Top Right Name + Photo Icon > Here

1. This is the user's profile page wherein they can check their details and edit them.
2. First Name + Last Name
   Edit Name
3. Profile Picture
   Add/Edit Photo
4. Email Address
5. Phone Number
   Add/Edit Phone Number
6. Password
   Change Password
7. User Type
8. Donor
9. Logout Button (with confirmation popup)

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

2.1 Manage Organisation

Main Menu > Here

1. Details of organisation
   1.1. Brand Name
   1.2. Edit Details
2. Grid view of entities in organisation. Fields for each Entity:
   2.1. Name
   2.2. Code
   2.3. Status (incomplete, complete, expired, etc)
   2.4. Some other details TBD
   2.5. View/Edit Entity
3. Create Entity

Allows user to edit superNGO details here itself or in a simple popup

Takes user to **2.3** view/edit entity

Takes user to first page of **2.2** create entity flow

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

2.2 Setup/Create Entity [1]

Main Menu > Manage Organisation > Here

1. Page 1: Select CSR organisation
   1.1. Advisory page of that Org (types of ngos it funds)
2. Page 2: Basic Details. This is a form with fields:
   2.1. Legal Name
   2.2. Brand Name
   2.3. Code (unique acronym)
   2.4. Website
   2.5. Nature of Operations
   2.6. Registration Details (for each registration type):
      2.6.1. Date, Type, State, Number, Address [certificate, MoA]
   2.7. Categories
   2.8. Geographies
   2.9. Organization scale table (staff experience, geographical reach, beneficiary reach)
3. *Page 3:* Legal Details: This is a form with fields:
   3.1. Legal Name
   3.2. 12A Certification:
      3.2.1. Number, Date, expiry, cancellation?
   3.3. PAN Number [soft copy]
   3.4. TAN Number [proof]
   3.5. 80G Details
      3.5.1. Number, Date, expiry [proof, government website screenshot proof]
   3.6. Other Tax Exemptions [proof]
   3.7. EPF Number [filings]
   3.8. Professional Tax Number [filings]
   3.9. Offices
   3.10. Certifications (with details) [proof]

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

2.2 Setup/Create Entity [2]

Main Menu > Manage Organisation > Here

4. Page 4: Other Details
    4.1. Linkages (partnerships)with details
    4.2. Organizational Structure [organogram]
    4.3. Governing Body (no of members, table with details): Each registration has its own governing body.
5. Page 5: Staff/Finance Management > Form with fields:
    5.1. Budget (with tables)
    5.2. Donor details (with table)
    5.3. Number of employees - direct, contract, part-time
    5.4. Salary of Senior Leadership (with table of details)
    5.5. Staff Breakup (with Table)
    5.6. Part Time Staff (with Table)
    5.7. Vehicles & other assets (with table)
    5.8. Foreign Travel at institutional expense (with table)
    5.9. Financial statements and income tax returns
    5.10. Bank Template (sample supplied by us to be filled)
    5.11. GST (certificate, if none, then exemption letter)
    5.12. Cancelled Cheque
    5.13. Name as per bank????????
6. Page 6: Policies [Handbook/document] Form with fields:
    6.1. Sexual harassment
    6.2. Whistleblower
    6.3. Child protection
    6.4. Other (with details)
    6.5. Travel Policy
    6.6. Salary Policy
    6.7. Recruitment Policy
    6.8. Accounting & Audit Policy
    6.9. Credibility Alliance Report

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

2.2 Setup/Create Entity [3]

Main Menu > Manage Organisation > Here

7. Page 7: CSR Organisation specific questions. Different form is shown depending on questions required by the CSR organisation they chose in the beginning. Our questions:
   7.1. Tax exemption percentage
   7.2. Annual Reports? (with last few reports)
   7.3. Previous Bajaj Funding? (with details)
   7.4. Bajaj Awards? (with details)
   7.5. National/International Awards? (with details)
   7.6. Litigation, Blacklists and Violations
   7.7. Affiliations (political/religious, senior bajaj company/family members involved in the ngo, senior NGO people involved in bajaj)
8. If possible, page 2 (the first form page) will have a [downloadable pdf form] that can be filled offline and then the [filled pdf form] can be uploaded here. User still goes through all the pages in the steps to upload required documents, however fields entered in pdf will be pre-filled.
9. Each page (except for the last one) in the setup/create flow has the following buttons:
   Next
   Skip For Now (Only appears if ngo has required fields remaining unfilled)
10. Last page has buttons:
   Save
   Save & Create Project Proposal
11. If an entity already existed for this superNGO, then page 2 (first form page) has an additional question:
   11.1. Enter relationship of new entity with other entities in superNGO

Does a check for required fields, if all have been filled takes user to next page in the flow. Filled in fields are saved in db.

This button only appears if user taps "Next' and required fields are incomplete. Allows user to move on to next page in the flow without filling in remaining fields. Filled in items are saved in db.

Saves data and takes user to **2.3** Entity detail page for this entity

Saves data and takes user to **3.2** Create Proposal

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

2.3 View/Edit Entity

Main Menu > Manage Organisation > Here

1. Brand Name, Legal Name and Code
2. If any documents have expired/are nearing expiry, or if any data is incomplete, show a notification box on top with details
3. All items from create entity flow with same groupings (except for page 1)
4. If multiple CSR Orgs have been submitted to, then show box for each csr org
5. Every box has button:
   Edit
   Save Changes
6. Proposals (created by this entity)
   6.1. Table: with the proposal list
        Columns: Name, Org, Submission Date, status
        Action
        View Proposal
7. Projects
   7.1. Table: with the project list of this ngo
        Columns: Name, Org, startDate, status
        Action
        View Project
8. Create Proposal

Makes box editable (or takes user to edit page for that box)

Saves changes (if user edited on a different page, then this button is on that page)

Takes user to **3.3** Proposal Details Page

Takes user to **4.2** Project Details Page

Takes user to **3.2** Create Proposal

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

3.1	Proposals (Listing Page)

Main Menu > Here

1. Tabs for In Review; Approved; Rejected
2. *Table: List of Proposals*
3. *Filters:*
   - *3.1.* Status
   - 3.2. NGO Entity
   - 3.3. CSR Organisation
   - *3.4.* Search Box
4. *Columns (sorting available on all columns):*
   - *4.1.* Proposal Name
   - 4.2. CSR Org Name
   - *4.3.* Proposal Status
   - *4.4.* Date of Submission
5. *Action*:
   View Proposal
6. Create Proposal

Goes to **3.3** Proposal detail page

Goes to first page in **3.2** Create Proposal flow

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

Allows user to prefill (a subset of) fields throughout the new proposal from an existing proposal.

3.2 Create New Proposal [1]

Main Menu > Proposals > Here

1. Page 1: Select CSR organisation & Entity (prepopulated depending on where user navigated from)
   1.1. Fetch Data from Existing Proposal
   1.2. [downloadable pdf form] that can be filled offline and then the [filled pdf form] can be uploaded here. User still goes through all the pages in the steps to upload required documents, however fields entered in pdf will be pre-filled.
2. Page 2: Proposal Overview. Form with fields:
   2.1. Title
   2.2. Focus Area
   2.3. Beneficiary categorisation (with table)
   2.4. geographies
   2.5. Start Date (time till start)
   2.6. End Date (duration)
   2.7. Local Address
   2.8. Contact Person Details
   2.9. Executive Summary (large paragraph)
   2.10. Key activities (in table format)
3. Page 3: Proposal Details: Form with fields:
   3.1. History of organisation with proposed type work and in proposed area
   3.2. Beneficiary identification, targeting and role
   3.3. Problem Statement
   3.4. Solution created by proposal
   3.5. Outcomes & impact assessment
   3.6. Sustainability Plan
   3.7. [M&E Document]
   3.8. [Other proposal related documents]

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

3.2	Create New Proposal [2]

Main Menu > Proposals > Here

4. Page 4: Budgeting Details (Form with fields)
    4.1. Total Funds for project
    4.2. District wise (fetched from entered geographies) budget allocation
    4.3. Total funds from bajaj
    4.4. Source of balance funds (in table format?)
    4.5. [Budget File]
5. Each page (except for the last one) in the setup/create flow has the following buttons:
    Next
    Skip For Now (Only appears if ngo has required fields that are unfilled)
6. Last page has buttons:
    Save
    Submit
7. If user tries to submit incomplete proposal AND this proposal has not previously requested for GC access show button:
    Request Authorisation to Submit Incomplete Proposal

Does a check for required fields, if all have been filled takes user to next page in the flow. Filled in fields are saved in db.

This button only appears if user taps "Next' and required fields are incomplete. Allows user to move on to next page in the flow without filling in remaining fields. Filled in items are saved in db.

Saves data and takes user to **3.3** Proposal Detail page for this proposal

If ngo's profile status is complete and all required fields in this proposal have been filled OR green channel has been granted for this proposal OR user has email ending @jbgvs.org.in, submit this proposal to the selected csr organisation. User gets taken to proposal detail page for this proposal.

Proposal appears in **2.3** green channel requests page of csr panel

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

3.3 Proposal Edit/ Details

Main Menu > Proposals > Here

1. Title, CSR Org, Code and Status
2. All notifications that have been received from the csr organisation for this proposal
3. All items from create proposal flow with same groupings (except for page 1)
4. If multiple CSR Orgs have been submitted to, then show box for each csr org
5. Every box has button:
   Edit
   Save Changes
6. Submit
   ReSubmit
7. If user tries to submit incomplete proposal AND this proposal has not previously requested for GC access show button:
   Request Authorisation to Submit Incomplete Proposal

Makes box editable (or takes user to edit page for that box)

Saves changes (if user edited on a different page, then this button is on that page)

If ngo's profile status is complete and all required fields in this proposal have been filled OR green channel has been granted for this proposal OR user has email ending @jbgvs.org.in, submit this proposal to the selected csr organisation.

This button only exists in certain scenarios. It does the same required fields check and then re-submits the proposal to the csr organisation

Proposal appears in **2.3** green channel requests page of csr panel

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

4.1 Projects (Listing Page)

Main Menu > Here

1. Tabs for Live; Completed
2. *Table: List of Projects*
3. *Filters:*
    3.1. Status
    3.2. Entity
    3.3. CSR Org
    3.4. Search Box
4. *Columns (sorting available on all columns):*
    4.1. Project Name
    4.2. CSR Organisation Name
    4.3. Entity Name
    4.4. Project Status
    4.5. Start Date
    4.6. End Date
5. *Action:*
    View Project

Goes to **4.2** Project detail page

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

Takes user to **3.2** proposal details page

Takes user to **4.2.2** donor details page for that donor

When NGO adds or edits any of these documents, they have to click on submit changes before the changes get saved and submitted to the CSR organisation (and the document request notification is marked resolved)

Takes user to **4.2.1** cycle details page

4.2 Project Details

Main Menu > Projects > Here

1. Project Title, entity, csr organisation, status
2. All Live Notifications for this project (if any)
3. *Proposal Details*
   3.1. Title
   3.2. Focus Area
   3.3. Beneficiary categorisation (with table)
   3.4. geographies
   3.5. Start Date (time till start)
   3.6. End Date (duration)
   3.7. Local Address
   3.8. Contact Person Details
   3.9. Executive Summary (large paragraph)
   3.10. Key activities (in table format)
4. Project Details
   4.1. Start Date
   4.2. End Date
   4.3. Donor(s)
   4.4. For each donor:
      4.4.1. Donor Details
   4.5. MoU
   4.6. [bank details]
   4.7. [Cancelled Cheque]
   4.8. [other documents TBD]
   4.9. Submit Changes
5. Cycles (NGOs can only see completed cycles and the next pending cycle)
   5.1. Table: Cycle List
      5.1.1. Columns: Start Date, Payment Date, Status
      5.1.2. Action
      View Cycle

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

4.2.1 Cycle Details

Main Menu > Projects > Project Details > Here

1. Cycle Number, Project Title, entity, csr organisation, Status
2. All Live Notifications for this cycle (if any)
3. Cycle Details:
   3.1. Start Date
   3.2. Payment?
4. If Payment then show payment details:
   4.1. Donor
   4.2. Amount
   4.3. NGO payment Docs
      4.3.1. [Bank Document]
      4.3.2. [Some Others TBD]
   4.4. Payment details TBD
      4.4.1. [Proof of Payment]
5. Reporting Documents. Only ngo document list will be shown here, e.g.:
   5.4.1. [Self Assessment Report]
   5.4.2. [Some others TBD]
6. Save & Submit

When NGO adds or edits any of these documents, they have to click on submit changes before the changes get saved and submitted to the CSR organisation (and the document request notification is marked resolved)

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

4.2.2	Donor Details

Main Menu > Projects > Project Details > Here

1. Donor Name, code
2. Donor Details:
   2.1. Public legal details (TBD)
   2.2. [Legal documents TBD]
   2.3. [Logo and other Artwork]
   2.4. Other info TBD

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)

NGO

5.1 Notifications

Main Menu > Here

1. Show Tabs for New/Live and Resolved Notifications
2. *Table: List of notifications for an NGO*
3. *Filters:*
    3.1. Entity
    3.2. Type
    3.3. Search Box
4. *Columns (sorting available on all columns):*
    4.1. Name
    4.2. CSR Org
    4.3. Entity
    4.4. Proposal/Project
    4.5. Time
    4.6. Status
5. *Action:*
    View Notification

Takes user to the relevant entity/proposal/project/cycle page

	ALL NGO
	Owner (SuperNgo)
	Owner (Entity)