**To Change**

Action taken to Accomplished

**CPESD Information System**

**Admin**

* **Dashboard**
* Count Completed Transaction
* Count Pending Transactions
* Total Volume of Business

Total Collection/Sales + Total Released/Purchases

* Total Cash Position

Cash in bank + Cash on Hand + Inventories

* Number of PO's
* Number of COOP's
* Number NSC
* Graph
* Completed - Green
* Pending – Red
* Limit New Pending Transactions
* All Users
* **Completed Transactions Report**
* View Completed Transactions in table
* PMAS NO
* Date & Time Filed
* Type Of Activity
* CSO
* Person Responsible
* Total Transactions - position bottom
* Reload Table
* Export
* PMAS NO
* Date & Time Filed
* Type of Activity
* Person Responsible
* Total Transactions - position bottom
* Filter Date Transactions
* Filter Type of Activity

if type of activity is [Regular Monthly Project Monitoring](javascript:;)

Modal show

* Filter Date
* Filter CSO
* Delinquent
* Overdue
* Total Production
* Total Collection/Sales
* Total Released/Purchases
* Total Delinquent Account
* Total Over – due Account
* Cash in Bank
* Cash on Hand
* Inventories
* Total all – position bottom
* **Pending Transactions**
* View Pending Transactions in table
* PMAS NO
* Date & Time Filed
* Type Of Activity
* CSO
* Person Responsible
* View Information
* Filter Date
* Export
* For Approval process
* Add Remarks
* View if Accomplished – including Date
* Approved Transactions
* **Add Transactions**
  + **PMAS NO 2023-04-01**
* **CSO**
* View CSO Table
* CSO
* Complete Address

Purok = readonly, Number = input[type=number]

Barangay = Dropdown

* Contact Person
* Contact Number
* Telephone Number
* Email Address
* COR – PDF FILE
* BYLAWS – PDF FILE
* AOC/AOI – PDF FILE
* OTHER DOCS

* Type of CSO
* PO's
* COOP’s
* NSC
* President/BOD Chairperson/BOT
* Vice President/BOD Vice Chairperson
* Secretary
* Treasurer
* Auditor
* Manager
* Filter CSO Type
* Export
* View Transactions
* View Information
* **Register Type of Activity**
* **Register Responsible Section**
* **Users**
* **Update Personal Information**
* **Activity Log**

**USERS**

* **Dashboard**
* Count Completed Transaction
* Count Pending Transactions
* Total Volume of Business

Total Collection/Sales + Total Released/Purchases

* Total Cash Position

Cash in bank + Cash on Hand + Inventories

* Number of PO's
* Number of COOP's
* Number NSC
* Graph
* Completed - Green
* Pending – Red
* All Users
* **Completed Transactions Report**
* View Completed Transactions in table
* PMAS NO
* Date & Time Filed
* Type Of Activity
* CSO
* Person Responsible
* Total Transactions - position bottom
* Reload Table
* View Transactions Information
* Export
* PMAS NO
* Date & Time Filed
* Type of Activity
* Person Responsible
* Total Transactions - position bottom
* Filter Date Transactions
* Filter Type of Activity

if type of activity is [Regular Monthly Project Monitoring](javascript:;)

Modal show

* Filter Date
* Filter CSO
* Delinquent
* Overdue
* Total Production
* Total Collection/Sales
* Total Released/Purchases
* Total Delinquent Account
* DocTotal Over – due Account
* Cash in Bank
* Cash on Hand
* Inventories
* Total all – position bottom
* **Pending Transactions**
* View Pending Transactions in table
* PMAS NO
* Date & Time Filed
* Type Of Activity
* CSO
* Person Responsible
* View Information
* Filter Date
* Export
* For Approval process
* Waiting for remarks
* View Remarks
* Waiting for Confirmation
* **Request for Assistance**

**TREE**

**View RFA**

* Document Tracking
* View RFA table
* Reference No – Example **2023-04-01**
* Name of Client
* Complete Address
* Type of Request
* Type of Transaction

Simple

* One person

Complex **-** Tracking = Transaction History

* Received By
* Date And Time
* Action Taken
* Referred to
* Date And Time
* Action to be taken
* Is approved
* Date And Time Approved

* **Update Personal Information**
* **Activity Log**