Reports :

High Level Description :

1. I want to download a report in PDF/Sheet format related to my current term year, current financial year, year-specific, date-specific, and also the entire financial income, expenses, cash bill, and transactions of me and my team. I should be able to view and download reports separately sub Module Specific and also on a member-specific basis.

2. I want to download a report in PDF related to my current term year, current financial year, or any specific year. Additionally, I should be able to download entire projects, project expenses, and event expenses. should be able to view and download these reports separately on sub Module Specific and also on a member-specific basis.

Objectives:

- Projects Reports
- Finances Reports
- Members Reports
- Events Reports
- Privilege Management

Access will be granted starting from L3 roles only.
L3-L7:
After logging into the affiliation I am part of, I will navigate to the Reports section.
Report Options :

- Finances
- Projects
- Members
- Events

If I Select Finances:
I want to see the consolidated financial data of my affiliation, with each member's finances displayed in rows and columns. I should be able to download this data in Excel or PDF format.

Should Include all
Financial Objectives:

- Income (One-Time, Pass Sales, and Recurring Payments)
- Expenses (Project and Event Expenses)
- Advances

Filter Section:
To retrieve specific data for download in Excel or PDF format, I should be able to apply the following filters:

- **Select Finance Type:** Dropdown options include Financial Year or Street Cause Term Year Data.

- **Select Year:** Dropdown to select years (e.g., 2024-25, 2025-26). New years should automatically appear upon entry.
    - This option will be greyed out if the Finance Type is not selected.
- **Select Custom Start Date & End Date:** These fields will be greyed out if any other filter is selected.
- **Select Specific Finance Data:** Dropdown options include:
    - Income: One-Time, Recurring, Pass Sales
    - Expenses: Project, Event Expenses
    - Advances (should update based on the selected Finance Module)

(Sheet LINK)

Filter1										
Select Term	**Select Year**	**Select Start Date**	**Select End Date**	**Income**	**Expenses**	**Advances**	**City**	**Affiliation**	**Project/Event**	
Select	Select Year	9/28/2022	7/17/2025	Select	Select					
Buttons (Enable all the buttons only if I Select the Radio Button)										
Detailed Income	**Detailed Expense**	**Detailed Advances**	**Detailed Project**	**Detailed Event**	**Detailed Member**				**Download Excel**	**Download PDF**

Select	Member ID	Affiliaiton	City	Transaction ID	Source	Payment Mode	Time & Date	Comments	Proofs(Img Link)	Approver	Advances	Amount Debit	Amount Credit	Donor Name/pass Holder Name	Donor /Pass Holder Mobile Number	Donor/ Pass Holder Email ID	Project	Task	Project Category	Project Department	Total Amount
Radio Button					Donation	UPI			Pan Card												
Radio Button					Subscription	Razor Pay			Expense Proof												
Radio Button					Pass	Bank Transfer															
Radio Button					Project Expense	Cash															
Radio Button					Event Expense																

If I Select Projects, I Should be able to see the consolidated Projects Data of my affiliation, with each member's finances displayed in rows and columns. I should be to able to download this data in Excel or PDF format

Should Include all
Project Objectives :

1. Select affiliation
2. Select project
3. Department
4. Category

5. Project status
6. Start and end dates

Filter Section:
To retrieve specific data for download in Excel or PDF format, I should be able to apply the following filters:

- **Select Finance Year Type:** Dropdown options include Financial Year or Street Cause Term Year Data.
- **Select Year:** Dropdown to select years (e.g., 2024-25, 2025-26). New years should automatically appear upon entry.
  - This option will be greyed out if the Finance Year Type is not selected.
- **Select Custom Start Date & End Date:** These fields will be greyed out if any other filter is selected.
- **Select Specific Project Data:** Dropdown options include:
  - Affiliations(Select the Affiliation that needs to be filtered, greyed out if i don't have access to more than 1 affiliation show the default affiliation)
    Projects (Should show List of the Projects of my affiliation)
    Department (Select the Department which are listed in the project management)
    Category (Select the categories which are listed in the project management).
    Project Status (This should be colored based on the status, Completed - Green, Ongoing - Yellow, etc).

Should Include all
Event Objectives :