

Ticket: CP-533

Projects / Client Portal / CP-521 / CP-533

Action Items - Upload Bookkeeping Docs

+ Add

Description

- As a user, when I click "resolve" on the open action item "Upload your bookkeeping documents", I want to see the popup below.
- The status should change from "Needed" to "Received" after the member has uploaded a document.
- The document should display the note left by the guide indicating what document is needed.
- selecting "upload" on each line pulls up the clients files from their computer and allows them to select a single document.
- The member can add a note that should send a notification to the guide if they choose. The field is not mandatory.

!

Bookkeeping Documentation - Required

Please upload the requested documents:

Status:	Document:	Upload:	Add Note:
Received	Requested Document		Add Note
Received	Requested Document		Add Note
Received	Requested Document		Add Note

Done

Done

Actions

Improve S

Details

Development

3 commits

1 pull request

Assignee

Assign to me

Labels

None

Sprint

None

+3

Actual start

Nov 28, 2024, 12:26 AM

Actual end

None

Goals

None

Reporter

Parent

CP-521 Action Items

Fix versions

1.12.0

Test Result:



Grace Collamat

December 7, 2024 at 12:30 AM (edited)

Hi @A , during testing I've noticed the following:

1. After uploaded a document or added a note the spinning icon continues to spin.

!

Bookkeeping Documentation - Required

Please upload the requested documents:

Status:	Document:	Upload:	Add Note:
Needed	Card Transactions		<div>Add note</div>
Needed	Bank Transactions		test

Close

2. When I added a note to uploaded document, it will also keep showing a spinning icon, but when I close and re-open the modal, I noticed that the previously uploaded document is no longer visible.

!

Bookkeeping Documentation - Required

Please upload the requested documents:

Status:	Document:	Upload:	Add Note:
Needed	Card Transactions	<div>Upload Document</div>	<div>Add Note</div>
Needed	Bank Transactions	<div>Upload Document</div>	test

Close