

Ticket: MSA-402

Projects / MSA / Add parent / MSA-402

Fix issues in Action Item endpoint

+ Add

Description

Type: BUGFIX

1. Upload your tax docs = Display False, if All documents are uploaded or marked as 'N/A' -and- Final submission is true.

2. TRC = Display True, if Finalized is not equal to true.

Tax Checklist

Year 2024

Account Name My Small Business

TR Checklist Owner

Finalized -

Year 2024

Modified Time Nov 23, 2024 06:37 AM

Modified By

2024 TRC is not marked as Finalized, therefore the response should display 'true'.

3. Upload Bookkeeping Documents = True if 1 or more documents are not uploaded or marked as 'N/A'.

Bookkeeping Documents

Document Description	Type	Accepted	Document name	Document link	Note from Member	NA This Year
Sample 1	W2					
Sample 2	K1				Testing	

Done

Done

Actions

Improve Bug

Details

Assignee

Reporter

Development

Labels

Story Points

Sprint

Priority

More fields

Automation

Created November 26, 2024 at 2:32 AM

Updated December 6, 2024 at 10:07 PM

Resolved December 6, 2024 at 10:07 PM

Configure

Test Result:

GC

Grace Collamat

December 5, 2024 at 2:04 AM

Hi @J. here is the issue I've encounter during testing with your PR.

Upload your tax docs

Acceptance Criteria:

Display = True	Display = False	Data location
1 or more documents are not uploaded or marked as 'N/A'	All documents are uploaded or marked as 'N/A'	Tax Docs Request Lists Module
-or-	-and-	Tax Documents subform:
Final submission is false	Final submission is true	Document_link - uploaded
		NA_This_Year - N/A

Tax Doc Request 2024: In this example, notice that the 'Member Confirmed Final Submission' = 'true' but there are 1 or more documents which are not uploaded or marked as 'N/A', therefore the response for 'Upload your tax docs' should be 'true'.

Questions and Responses

Question for Member

Member Confirmed

Final Submission

Member Confirmed

Financial Statements

Tax Documents

Document Description	Type	Accepted	Document name	Document link	Note from Member	NA This Year
Sample 1	W2					
Sample 2	K1				Testing	

API Response: 'Upload your tax docs' should be 'true'.

```
1 {
2   "2024": {
3     "Tax Questions": true,
4     "Upload your tax docs": false,
5     "TRC": true,
6     "Sign your Tax Return": false,
7     "Upload Bookkeeping Documents": true,
8     "Answer Bookkeeping Questions": true,
9     "Onboarding": true,
10    "Bank Connections": true,
11    "Confirm Finacials": false,
12    "Unclassified": true
13  },
14  "2023": {
15    "Tax Questions": false
```

👍

🗨️

Reply

Edit

Delete