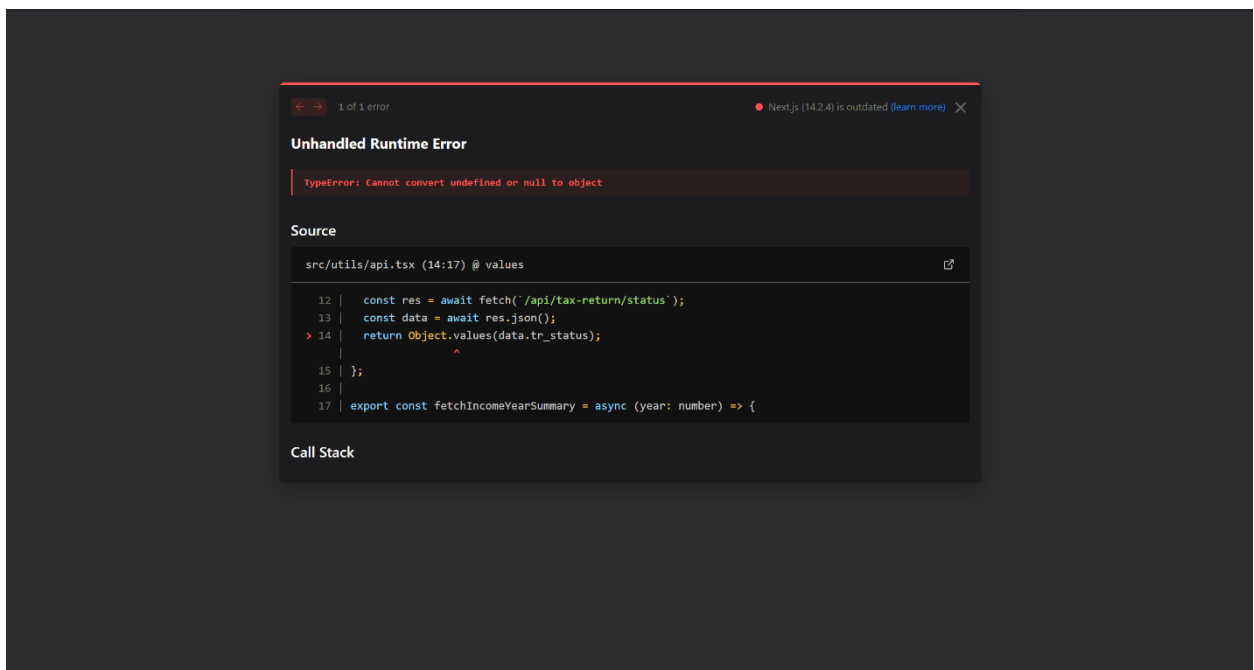
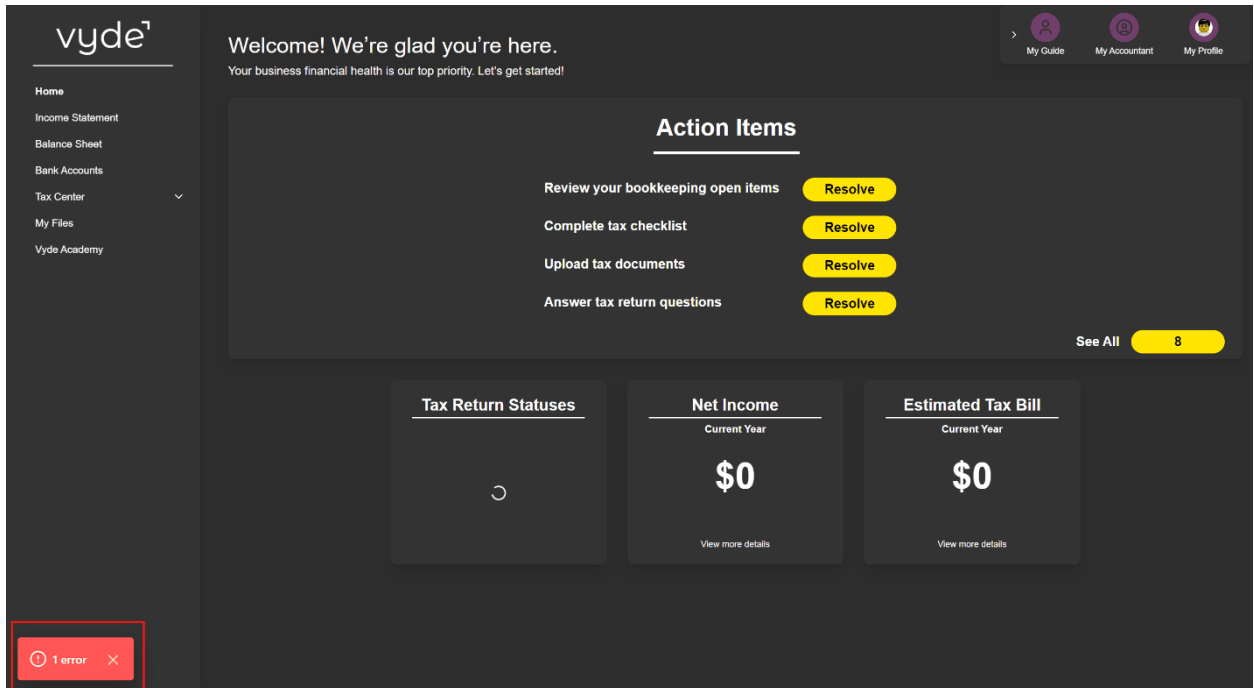
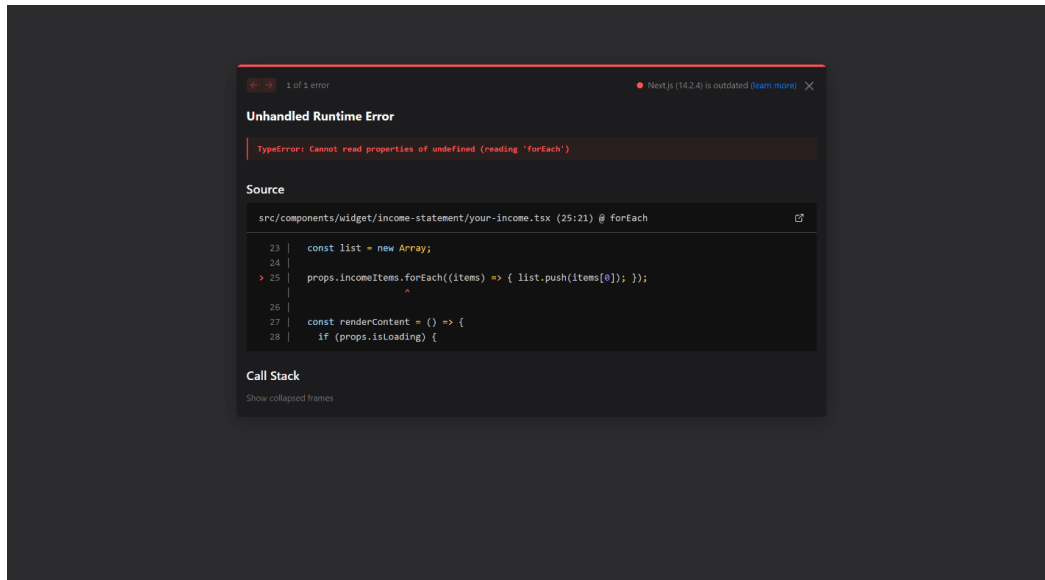


VYDE DASH BUG REPORTS

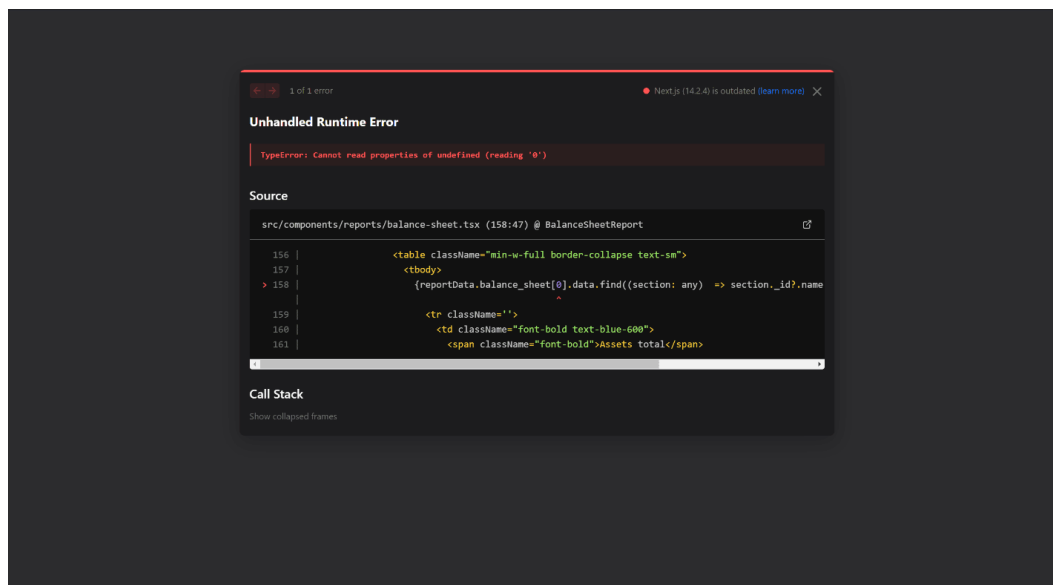
1. API parameters are outdated – Most likely due to MSA # 384
(<http://example.com/MSA-384>)
2. Home Page – Error pop-up instantly when accessing website



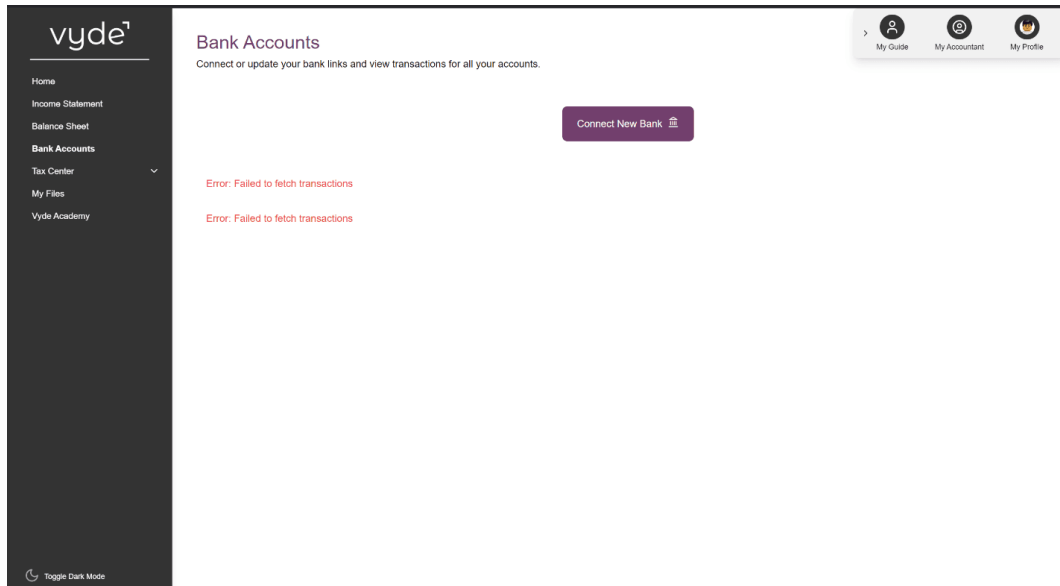
3. Income statement page– Error happens instantly when accessing Income Statement page



4. Balance Sheet – Error happens after selecting a date through date filter



5. Bank account – Failed to fetch cash accounts and credit cards



6. Tax Center

- ❖ Tax Advisory (Jira link: [https://vyde.atlassian.net/browse/VD-21](#))

BE - Estimate Calculator per year

- MSA endpoint: `api/v1/new-financial-reports`

- Ticket: [https://vyde.atlassian.net/browse/VD-53](#)

Tax Advisory

Resources to help you plan, strategize, and save more on your taxes.

< 2025 Tax Year >

Scenario 1 +

Personal Info

Filing Status

Number of Dependents

Income

W2 Income

Schedule C Income/Loss

Capital Gains/Loss

Business Income/Loss

Rental Income/Loss

Deductions

State and Local Taxes

Mortgage Interest

Charitable Contributions

Meet with tax accountant link

- Ticket: [https://vyde.atlassian.net/browse/VD-52](#)

- ❖ Tax Tracker (Jira link: [http://\[redacted\]se/VD-22](http://[redacted]se/VD-22))

Tax Return Tasks Per Year

- MSA endpoint: `api/v1/tax-return/status`
- Ticket: [http://\[redacted\]se/VD-56](http://[redacted]se/VD-56)

< 2023 >

Form 1120s

Congratulations!
Your return has been accepted by the IRS. Please remember to make any necessary payments that were due. If you are expecting a refund, it should be received within 3 weeks.

Filing Type: S Corporation
Extension Status: Filed
Tax Accountant: Jeff Jensen

Books

Tax Checklist

Tax Documents

In Progress

Review & Sign Owner

Filed

Accepted by IRS

Form 1040

Congratulations!
Your return has been accepted by the IRS. Please remember to make any necessary payments that were due. If you are expecting a refund, it should be received within 3 weeks.

Filing Type: Married-Filing Jointly
Extension Status: Filed
Tax Accountant: Jeff Jensen

Books

Tax Checklist

Tax Documents

In Progress

Review & Sign Owner

Filed

Accepted by IRS

Monthly Bookkeeping Progress - BE

- MSA endpoint: *The available MSA endpoint for bookkeeping only retrieves bookkeeping tasks with "anxiously waiting" and "tidal wave" status.*
- Ticket: [https://\[redacted\]VD-58](https://[redacted]VD-58)

< 2023 >

Form 1120s

Congratulations!
Your return has been accepted by the IRS. Please remember to make any necessary payments that were due. If you are expecting a refund, it should be received within 3 weeks.

Filing Type: S Corporation
Extension Status: Filed
Tax Accountant: Jeff Jensen

Books

Tax Checklist

Tax Documents

In Progress

Review & Sign Owner

Filed

Accepted by IRS

Form 1040

Congratulations!
Your return has been accepted by the IRS. Please remember to make any necessary payments that were due. If you are expecting a refund, it should be received within 3 weeks.

Filing Type: Married-Filing Jointly
Extension Status: Filed
Tax Accountant: Jeff Jensen

Books

Tax Checklist

Tax Documents

In Progress

Review & Sign Owner

Filed

Accepted by IRS

Bookkeeping Documentation – BE

- (CRM module: *Book Doc Request List*)
- MSA endpoint: *Can refer to Action Item API if there is a 'Boook doc request list' for the selected year*

! Bookkeeping Documentation - Required			
Status:	Document:	Upload:	Add Note:
Not Received	2024 Chase Bank Statements		Note Submitted
Received	2024 Credit Card Statements		Note Submitted
Received	2024 Expense Receipts		Note Submitted

Bookkeeping Questions – BE
- (CRM module: Book Doc Request List)

Bookkeeping Questions - Required

Please respond to the following bookkeeping questions:

Question:

Please describe any significant changes in your business operations during 2024.

Answer:

Submit note. Can yo uedit?asdf

Edit

Submitted

Have you made any major purchases or investments that should be noted in the books?

asdf

Edit

Submitted

Unclassifieds – BE (MSA endpoint: GET api/v1/)

Unclassifieds - Required

We need your input to classify these transactions accurately.

Income Transactions

Date	Description	Account	Amount	Category ⓘ	Notes
2024-03-15	Client Payment - ABC Corp	Business Checking	\$5000.00	Travel Expenses ▾	add notasdf
2024-03-14	Service Revenue	Business Checking	\$2500.00	Select category... ▾	asdf
2024-03-13	Consulting Fee	Savings Account	\$3750.00	Select category... ▾	Add note...
2024-03-12	Product Sales	Business Checking	\$1800.00	Select category... ▾	asdf

Expense Transactions

Date	Description	Account	Amount	Category ⓘ	Notes
2024-03-15	Office Supply Store	Business Credit Card	\$245.67	Select category... ▾	Add note...
2024-03-14	Airlines Ticket	Business Credit Card	\$876.54	Select category... ▾	Add note...
2024-03-13	Software Subscription	Business Checking	\$99.99	Select category... ▾	Add note...
2024-03-12	Office Rent	Business Checking	\$2500.00	Select category... ▾	Add note...

Submit

Tax Return Checklist – BE

Jira ticket: [https://\[REDACTED\]/D-173](https://[REDACTED]/D-173)

2024 Tax Return Checklist

1

2

3

4

5

6

7

8

9

Personal

Dependents

Filing Info

Rental Properties

Schedule C

Business Info

Business Owners

Year End Info

Finish

Your Name *

Benny Boy

Filing Status *

Single

Your Birthday *

01/22/1996

Your SSN *

123-35-3656

Did you receive an IP Pin this year? *

Select...

Street Address *

DODLE ST.

City *

FUR CITY

State *

Maine

ZIP *

542345

Did you move this year? *

Select...

Previous

Next

Tax Documentation - BE

- (CRM module: Book Doc Request List)

- MSA endpoint: Can refer to Action Item API if there is a 'Tax doc request list' for the selected year

2024 Tax Documentation

1

Tax Documents - Needed

Status:	Document:	Type:	Upload:	Still Applicable?	Add Note:
Received	Employment Income	W2		Select...	Add Note
Not Received	Contractor Income	1099		Select...	Add Note
Received	Investment Income	K1		Select...	Add Note

1

Tax Questions - Required

Please respond to the following tax-related questions:

Question:

What tax deductions are you planning to claim?

Answer:

Enter your answer here...

Submit

What is your childs social security number?

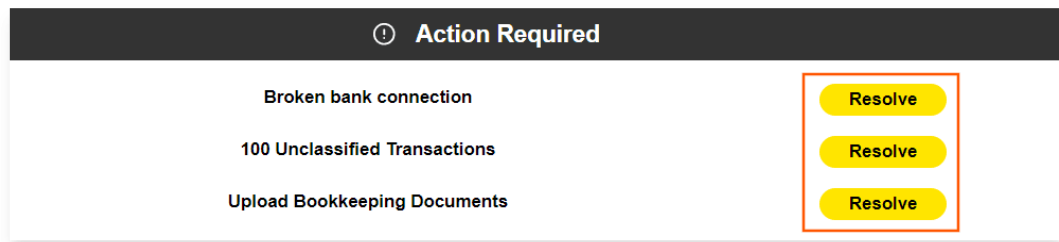
Enter your answer here...

Submit

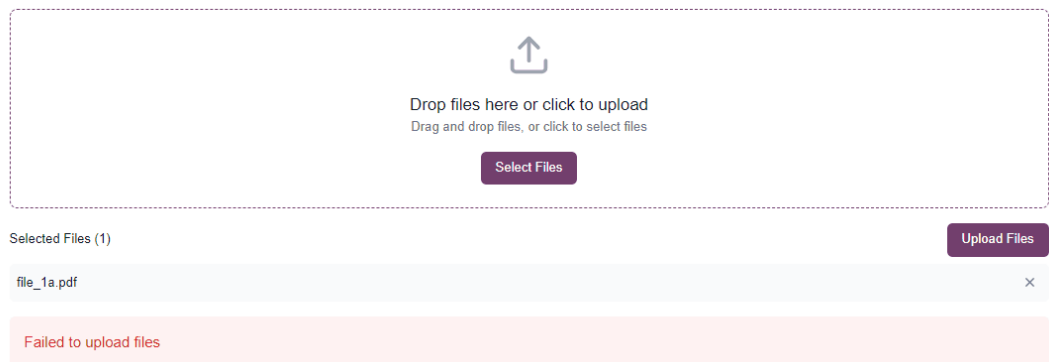
7. My Files

Action Required – BE

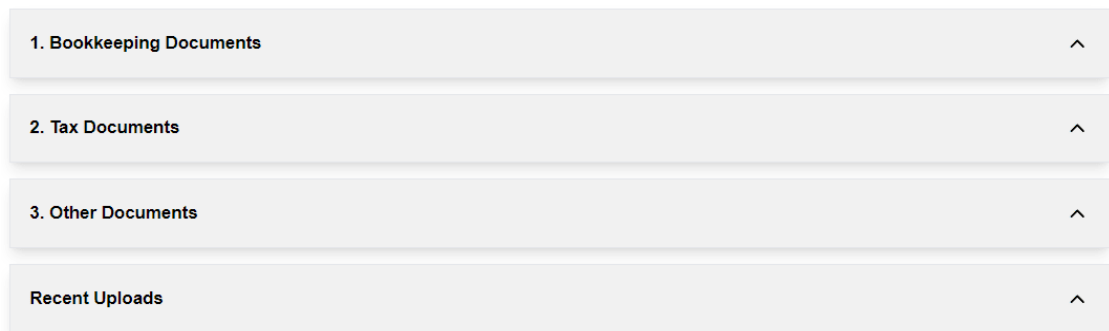
An error occurs upon clicking the 'Resolve' buttons



Unable to upload files – BE

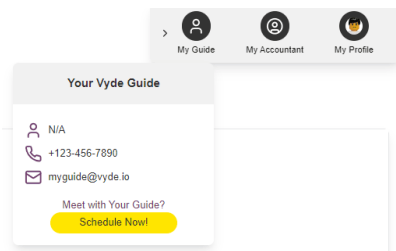


Properly categorize and display the uploaded documents into these sections:



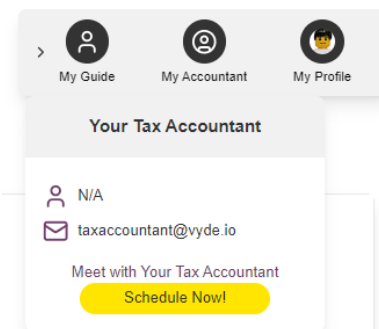
8. My Guide – BE

- Display the Name, Phone number, email address of the Guide.
- Add the Schedule now link



9. My Accountant – BE

- Display the name, and email address of the Tax accountant.
- Add Schedule Now link.



10. My Account – BE

- Display the members Profile, Business Profile, Vyde Services, Billing and Payments information
- MSA endpoint: GET account details API (/api/v1/...)

