# Test Report TDS Transactional Data Services Realtime

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| **Transactional Data Services Test Scenarios** | | | | **Test Plan** | | **Test Results** | |
| **Scenario ID** | **Method** | **API** | **Scenario Description** | **Applicable**  **(Y / N)** | **Exclusion Reason** | **Pass / Fail** | **Notes** |
| TDS001 | POST | Financials | Tax Agent submits a successful request to retrieve financial information for a linked customer using customerId and filingPeriod |  |  |  |  |
| TDS002 | POST | Financials | Tax agent submits an unsuccessful request to retrieve financial information for a non-linked customer using customerId |  |  |  |  |
| TDS003 | POST | Financials | Tax Agent submits a successful request to retrieve their own financial information using accountId and outstandingPeriodOnly |  |  |  | Only if the logon type of the tax agent is Owner  OR  the logon type of the tax agent is Administrator and their own accounts are present in their client list. |
| TDS004 | POST | Financials | A customer submits a successful request to retrieve their own financial information using accountId, filingPeriodFrom, and filingPeriodTo |  |  |  |  |
| TDS005 | POST | Financials | A Tax Agent submits an unsuccessful request to retrieve financial information for a customer when they do not have client list access using customerId |  |  |  |  |
| TDS006 | POST | Transactions Realtime | Tax Agent submits a successful request to retrieve transaction information for a linked account using accountId and filingPeriod |  |  |  |  |
| TDS007 | POST | Transactions Realtime | Tax Agent submits a successful request to retrieve their own transaction information using accountId, filingPeriod, postedFrom, and postedTo |  |  |  | Only if the logon type of the tax agent is Owner  OR  the logon type of the tax agent is Administrator and their own accounts are present in their client list. |
| TDS008 | POST | Transactions Realtime | Tax agent submits an unsuccessful request to retrieve transaction information for a non-linked account using accountId and filingPeriod. |  |  |  |  |
| TDS009 | POST | Transactions Realtime | A customer submits a successful request to retrieve transaction information for their own account using accountId and filingPeriod |  |  |  |  |
| TDS010 | POST | Transactions Realtime | A Tax Agent submits an unsuccessful request to retrieve Transaction information for an accountwhen they do not have client list access to using accountId and filingPeriod |  |  |  |  |
| TDS011 | POST | Transactions Realtime | A customer submits an unsuccessful request to retrieve Transaction information for an account with invalid accountId and filingPeriod |  |  |  |  |
| TDS012 | n/a | Transactions Realtime | 1. Tax Agent submits a successful request to retrieve transaction information for a linked account using accountId and filingPeriod 2. Software Intermediary requests IR to complete internal processes 3. Tax Agent submits a successful request to retrieve updated transaction information for a linked account using accountId and filingPeriod |  |  |  | (This will require IR intervention)  Note: step 2 will be part of IRs automatic processing outside of the testing environments |