Review Returns Bot – Documentation

Original Bot version

Dispatcher

* Login TaxSolver
* Go to Returns module.
* Create new Returns Failed file (from the Review Sheet file)
* Set Current Period in the Returns list.
* Clean and apply filters.
* Get total records displayed in the Returns list.
* Scrap and get all Return items (with hotkeys – Shift + AvPag Up Down). Save table as datatable.
* Get Returns total (from Returns list) and paste it into Review Sheet file.
* Get Total TS from Review Sheet and check if it is 0
  + If it is, then Extract Legal Entity from Returns table.
  + Add new row in Returns Failed table (in Review Sheet)
* Get Difference of Imported Data (from Review Sheet) and check if it is 0:
  + If it is, then Extract Legal Entity from Returns table.
  + Add new row in Returns Failed table (in Review Sheet)
* Add each return item to the queue.

# 1st Bot version

## Scope:

* Check each IR (item return) in TaxSolver.
  + Check adjustments.
  + Check if it has other deductions.
  + Check if it has any unique balance.
* Complete Review Sheet table (Returns Failed table).
* Send Review Sheet table to the user via email.

## Out of Scope:

* Login to TaxSolver.
* Open Returns module.
* Apply filters in the Returns list.
* Prepare Review Sheet file.
  + Create current month sheet (ex: May 2023)
  + Add Received Data report.
  + Extract and Add DMT table data.
  + Add Reconciliation table data.
  + Add Prepayment data.

# Conditions to start bot execution:

* Returns page must be open, with filters already applied.
* The following files must be contained in a same folder:
  + TFR (Tax Filed Report) file
  + Review Sheet file
* Citrix Extension must be installed.
* Chrome extension (Note: it is not required if the login is not in the bot scope)
  + Install it with UiPath.
  + Downloads -> Always ask where to save files.