* **Pre-requisite for Review Dashboard Document Functionality Script Execution:**

1. Binder should be created with using **Roll forward** tax client id.
2. Binder Status should be **Blank or Custom** Status.
3. Binder should content minimum **5 Missing, Received & New** Entity.
4. Binder should not be content any notes in it.

* **Binder Creation Process for Review Dashboard Document Functionality:**

1. Create tax client for 2021 - (Taxpayer info, proforma details in Income, Dividend, Interest forms)
2. Use **Roll forward** functionality on previous year (2021) tax client to create new tax client for 2022.
3. Edit some data fields to created missing entities. Also, add some new data in fields to create new entities.
4. Create binder using roll forward client id i.e. – 2022.
5. Complete all wizard’s verification process.
6. Process binder till SP Binder.
7. Same binder will appear in Review Dashboard.