**API – CCH Tax 2024**

Binder Type – 1040, Scan Verify Offshore

Environment – Live

Domain – Automation-01

**Observations:**

* **Wizards**

***Wizards - Did not appear***

Pre-Verification Wizard

Finalize Wizard

Tax Exempt

***Wizards - Appear***

* Verification Wizard – Make changes in payers name - Bank of America on pg6
* Change tax year to 2024

**Superseded**

* Make sure to supersede one page in Superseded Wizard

**CFA**

* Associate both the forms in Rental income

**Duplicate**

* Validate source documents and organize document
* If it is not checked select both the Exxon from source and organize mark it as check

**NFR**

* Associate one document to the respective folder
* **Leadsheet Match & Update**
* Change values in CCH tax client file:

1. Navigate to Worksheet tab > Federal estimate tax payment form
2. Edit the values for 4 fields from period 1 to period 4
3. Navigate to Worksheet tab > Fed Government tab > Form 1040
4. Fetch the value for line 15 and line 35a from Form 1040

* Perform Import in SPBinder
* Validate values in SPBinder Leadsheet:

1. Validate the total value for period 1 to period 4 in leadsheet
2. Validate the value for line 15 in leadsheet
3. Validate the value for line 35a in leadsheet

* **Add Document - SPBinder**

1. Add document with 2 pages one with correct SSN and another with incorrect SSN
2. Complete Verification wizard for 1st page will get correct SSN and next 2nd page will get incorrect SSN
3. Navigate to index tree in SPBinder
4. Validate document in index tree > Unused Folder > Incorrect SSN Folder > Incorrect SSN Page PDF