Python Script to Bulk Rename Tax Documents

Format: `TYPE - FY - FolderName - OldFileName`

Example: `Client Name_AIS_1.xlsm` → `AIS - FY26 - Client Name - Client Name_AIS_1.xlsm`

Run it

```
python rename_tax_files.py "C:\Path\To\Root Folder"           # preview only
python rename_tax_files.py "C:\Path\To\Root Folder" --apply   # actually rename
```

- Requires Python 3.10+.
- Root folder → subfolders (client names) → files.
- Only files directly inside those subfolders are renamed.

Type detection (first match wins)

- `FolderName_AIS` → **AIS**
- `26as` → **26AS**
- `ais` → **AIS**
- `tis` → **TIS**
- `intimation` → **143**
- `report` → **AIS**

No match → file is skipped (add `--include-unknown` to rename it as **UNKNOWN** instead).

FY detection

- `2026-27` in filename → FY26 (auto-works for any year)
- No year in that file's own name → borrows the first FY found among other files in the same subfolder
- Still none → `FY-Unknown`

Notes

- Duplicate new names get `' (1)`, `' (2)`, etc. - nothing is overwritten
- Nothing changes on disk unless you pass `--apply`
- Back up the folder before your first real `--apply` run

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rename_tax_files.py

```
"""
PlanMyTax - Bulk Tax Document Renamer
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Walks through a root folder's subfolders and renames files based on
detected document type and financial year, using the format:

    TYPE - FY - FolderName - OldFileName

Detection rules (checked in this order per file):
    - filename contains "26as"                        -> 26AS
    - filename contains "<foldername>_ais"             -> AIS
    - filename contains "ais"                          -> AIS
    - filename contains "tis"                          -> TIS
    - filename contains "intimation"                   -> 143
    - filename contains "report"                        -> AIS

Financial year:
    - Any "20XX-YY" pattern (e.g. 2026-27) in the filename becomes
      "FY" + last two digits of the first year (2026-27 -> FY26).

Usage:
    python rename_tax_files.py "C:\\path\\to\\root_folder"          # dry run (preview only)
    python rename_tax_files.py "C:\\path\\to\\root_folder" --apply   # actually rename

"""

import re
import argparse
from pathlib import Path


def detect_fy(filename: str) -> str | None:
    """Find a 20XX-YY pattern and return it as FY + last 2 digits of the first year."""
    match = re.search(r"(20\d{2})-(\d{2})", filename)
    if match:
        return f"FY{match.group(1)[-2:]}"
    return None


def detect_type(filename: str, folder_name: str) -> str | None:
    """Determine document type based on keywords in the filename."""
    lower = filename.lower()
    folder_lower = folder_name.lower()

    # Explicit "FolderName_AIS" pattern takes priority
    if f"{folder_lower}_ais" in lower:
        return "AIS"
```

```
    if "26as" in lower:
        return "26AS"
    if "ais" in lower:
        return "AIS"
    if "tis" in lower:
        return "TIS"
    if "intimation" in lower:
        return "143"
    if "report" in lower:
        return "AIS"
    return None


def build_new_name(doc_type: str, fy: str, folder_name: str,
original_name: str) -> str:
    return f"{doc_type} - {fy} - {folder_name} - {original_name}"


def unique_path(target: Path) -> Path:
    """Avoid overwriting an existing file by appending (1), (2), ...
before the extension."""
    if not target.exists():
        return target

    stem, ext = target.stem, target.suffix
    counter = 1
    while True:
        candidate = target.with_name(f"{stem} ({counter}){ext}")
        if not candidate.exists():
            return candidate
        counter += 1


def rename_files(root_dir: str, dry_run: bool = True, include_unknown:
bool = False):
    root_path = Path(root_dir)
    if not root_path.is_dir():
        raise NotADirectoryError(f"Not a valid folder: {root_dir}")

    renamed = []
    skipped = []

    for folder in sorted(p for p in root_path.iterdir() if p.is_dir()):
        folder_name = folder.name
        files_in_folder = sorted(p for p in folder.iterdir() if
p.is_file())

        # Folder-level fallback FY: the first FY found among any file
in this folder.
        folder_fallback_fy = None
        for f in files_in_folder:
```

```
            fy_found = detect_fy(f.name)
            if fy_found:
                folder_fallback_fy = fy_found
                break

        for file in files_in_folder:
            original_name = file.name

            doc_type = detect_type(original_name, folder_name)
            fy = detect_fy(original_name)

            if doc_type is None and not include_unknown:
                skipped.append((file, "no matching document type
keyword found"))
                continue

            doc_type = doc_type or "UNKNOWN"
            fy = fy or folder_fallback_fy or "FY-Unknown"

            new_name = build_new_name(doc_type, fy, folder_name,
original_name)
            new_path = unique_path(file.parent / new_name)

            renamed.append((file, new_path))
            if not dry_run:
                file.rename(new_path)

    return renamed, skipped


def main():
    parser = argparse.ArgumentParser(description="Rename tax document
files in subfolders")
    parser.add_argument("folder", help="Root folder containing
subfolders of files")
    parser.add_argument("--apply", action="store_true", help="Actually
rename files (default is dry-run preview)")
    parser.add_argument("--include-unknown", action="store_true",
                        help="Also rename files where no document type
keyword was matched (tagged UNKNOWN)")
    args = parser.parse_args()

    dry_run = not args.apply

    renamed, skipped = rename_files(args.folder, dry_run=dry_run,
include_unknown=args.include_unknown)

    mode = "DRY RUN (no files changed)" if dry_run else "APPLIED"
    print(f"\n=== {mode} ===\n")
```

```
    print(f"{len(renamed)} file(s) to rename:\n")
    for old, new in renamed:
        print(f"  {old.name}")
        print(f"    -> {new.name}\n")

    if skipped:
        print(f"\n{len(skipped)} file(s) skipped:\n")
        for path, reason in skipped:
            print(f"  {path} ({reason})")

    if dry_run:
        print("\nThis was a preview only. Re-run with --apply to
actually rename the files.")


if __name__ == "__main__":
    main()
```

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