



CMS SYSTEMS SOLUTIONS
CASEWARE AUTHORISED DISTRIBUTOR

RECOMMENDED PROCEDURE



Procedure for updating prepared IR4 2016 return

VERSION 5.00

PROCEDURE SUMMARY

1. **Open CaseWare Client File.....3**

2. **Select to Back Up file.....3**

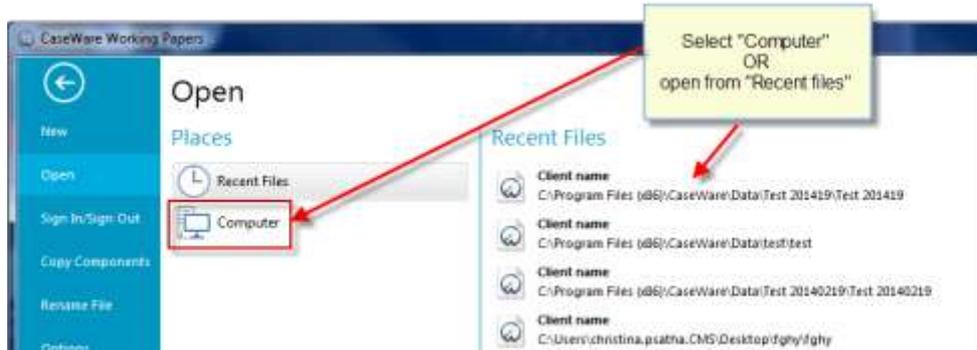
3. **Copy information store from the Template into the client file.....4**

4. **Select to open 01.14 Information store7**

5. **Select to open IR4 2016 return.....8**

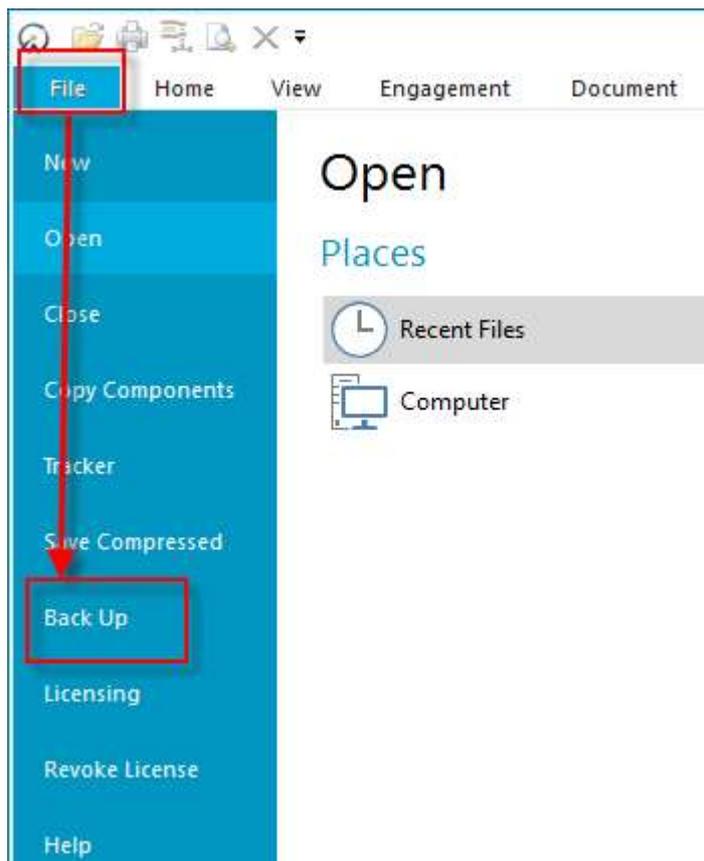
1. Open CaseWare Client File

- a. Open CaseWare Working Papers and either select your file from the Recent files list (if this has been recently opened) or click **Computer** to select the file from your computer or server.



2. Select to Back Up file

- a. Select File / Back Up

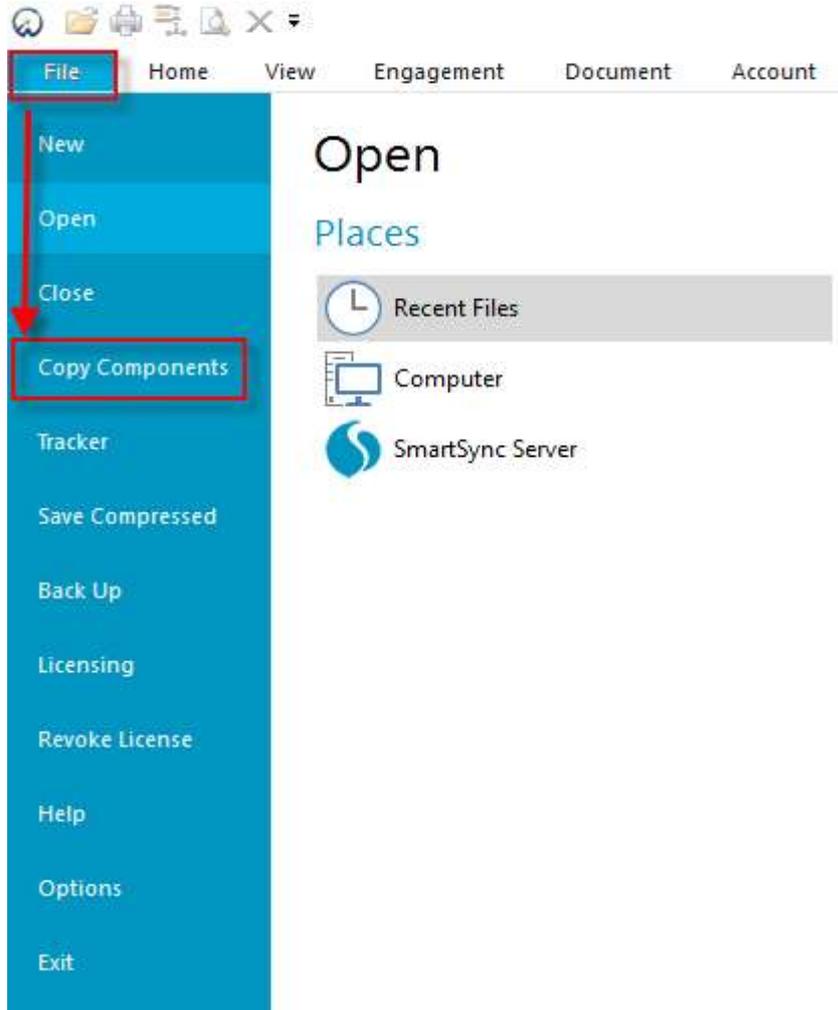


NOTE: CLOSE ALL DOCUMENTS BEFORE PROCEEDING

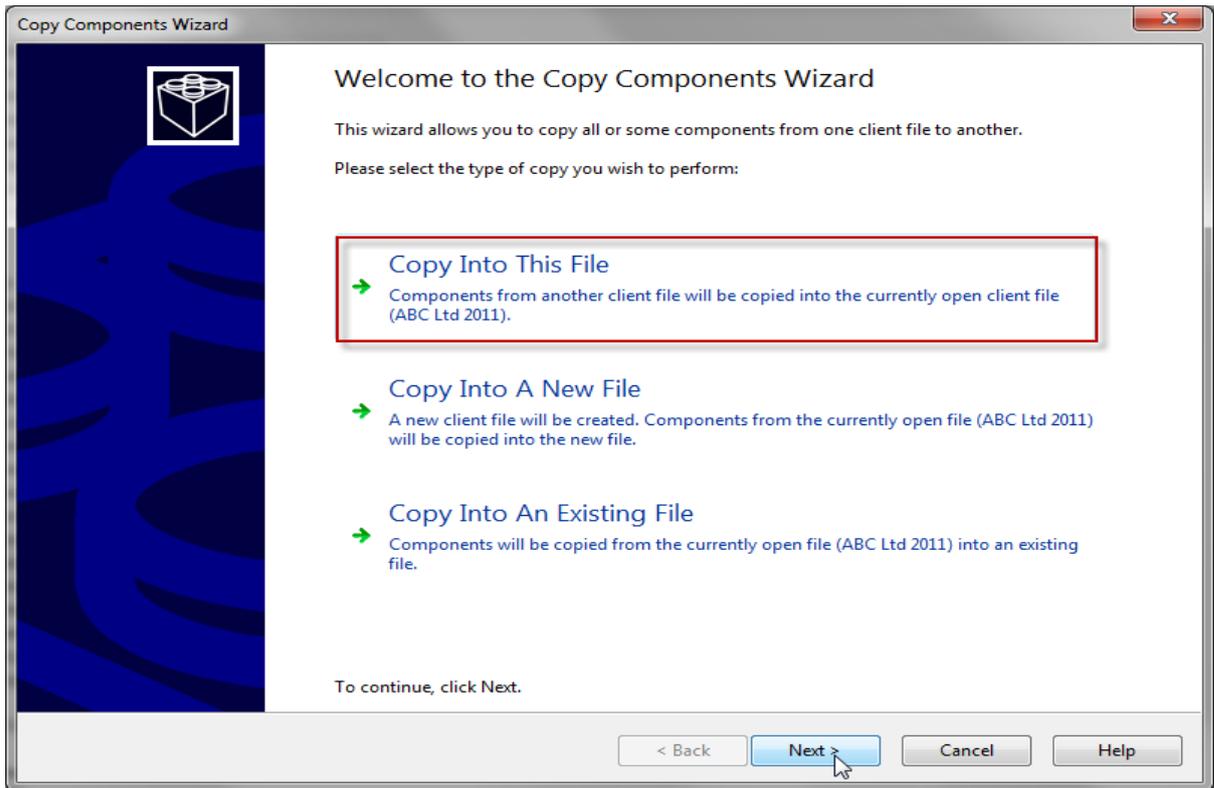
3. Copy information store from the Template into the client file

Using the Copy Components feature, update the client file with Information Store.

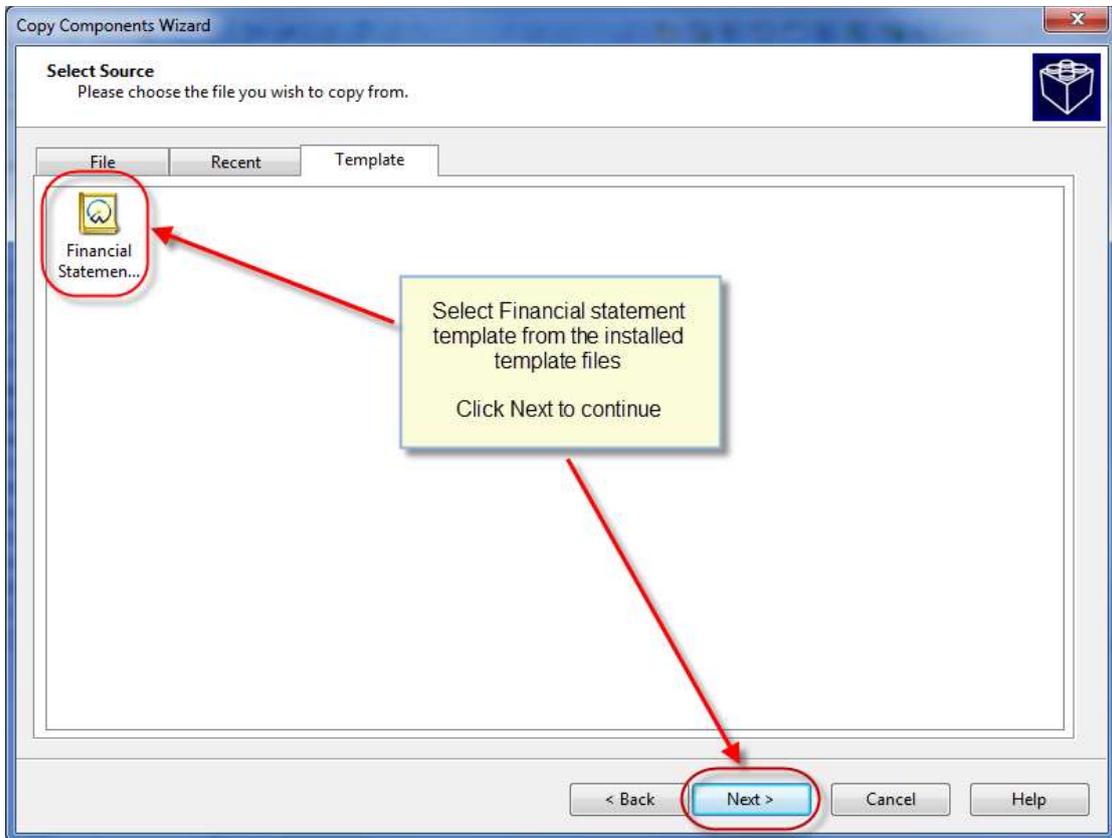
- a. Select the command File / Copy Components



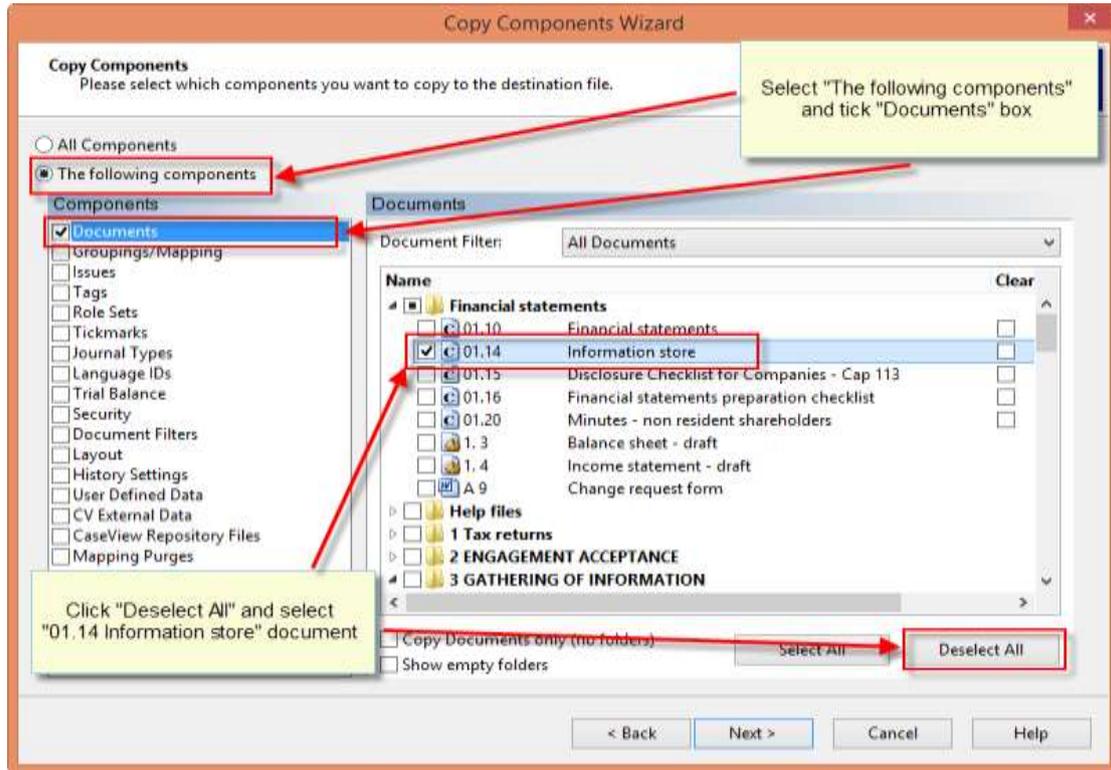
b. Select Copy into This File. Click Next.



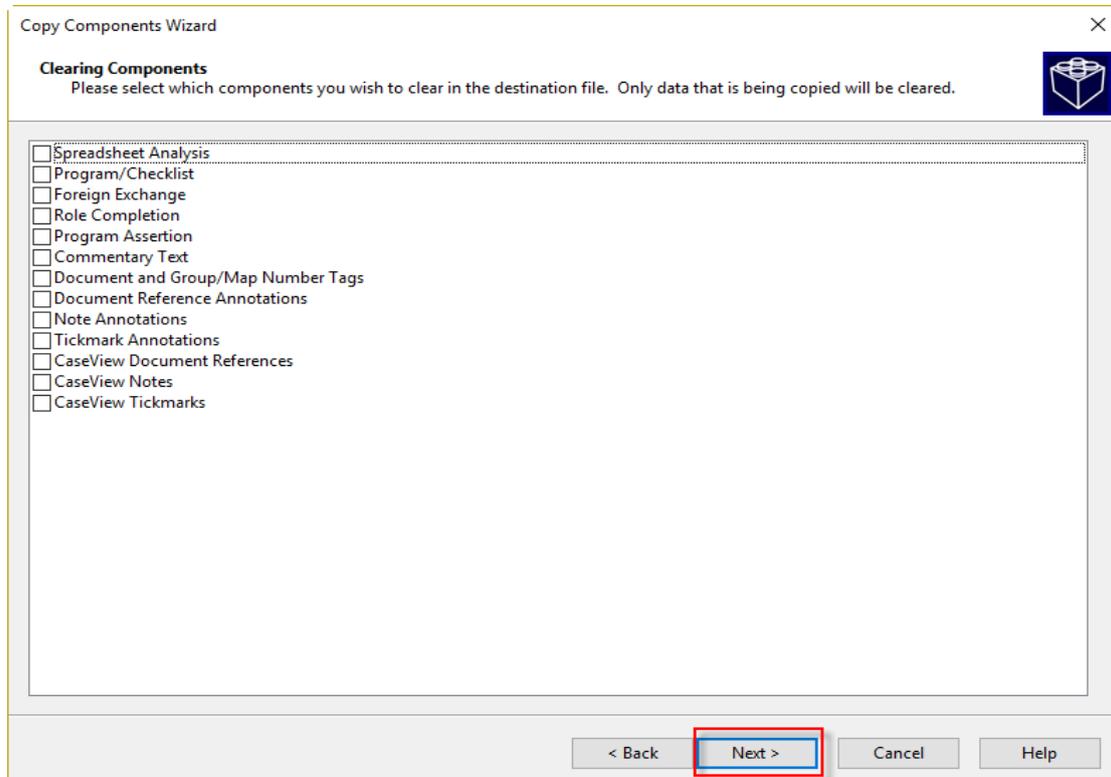
c. Choose the Financial Statements Template and click Next.



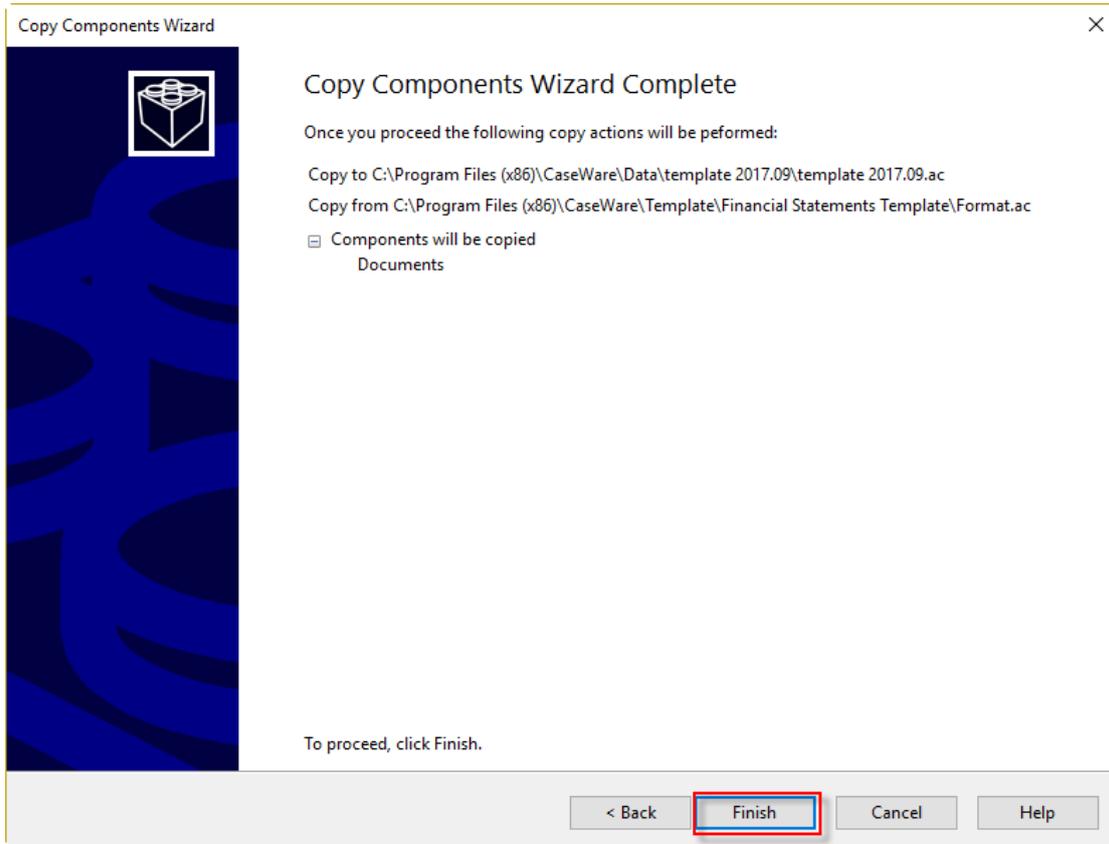
- d. Choose "The following components" and tick the Documents box. Click "Deselect All" and then select document "01.14 Information store".



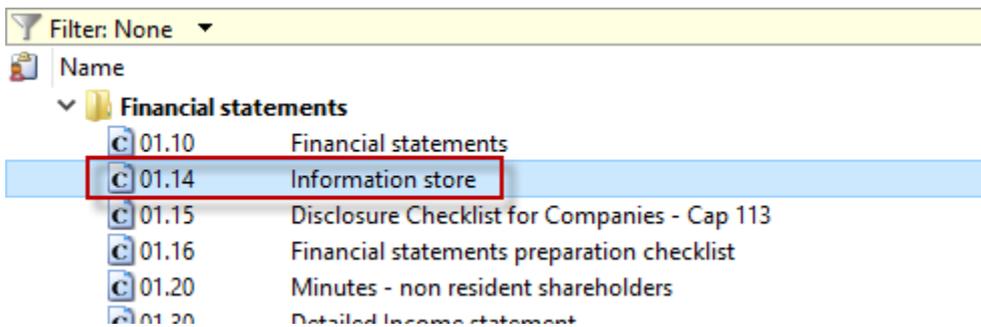
- e. On Copy Components Wizard choose Next to continue



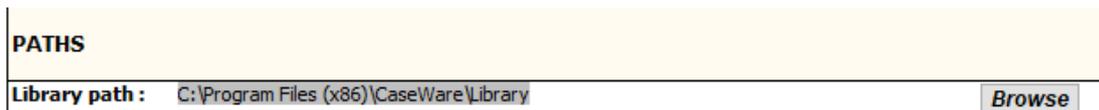
- f. Click Finish to complete the Copy Components wizard.



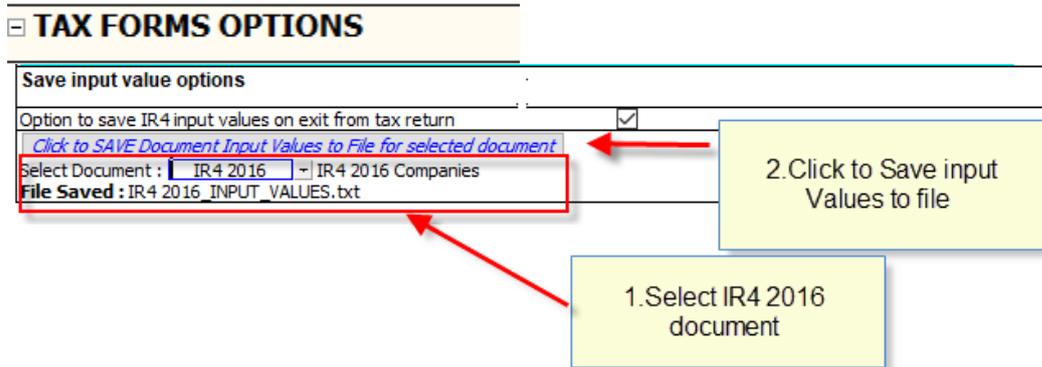
4. Select to open 01.14 Information store



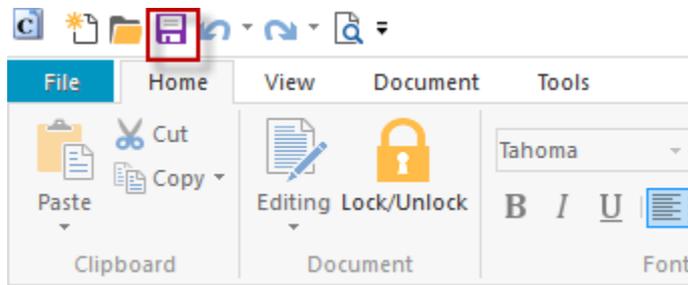
- a. Check if your Library path is correct.



- b. In TAX FORMS OPTIONS select IR4 2016 document and then click button to save input values to file



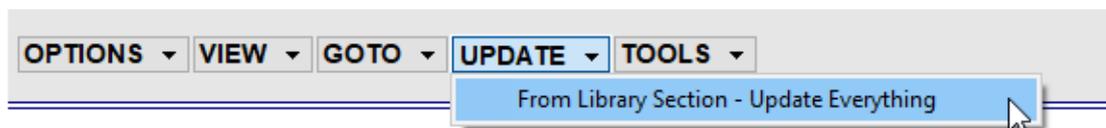
- c. Select to SAVE document



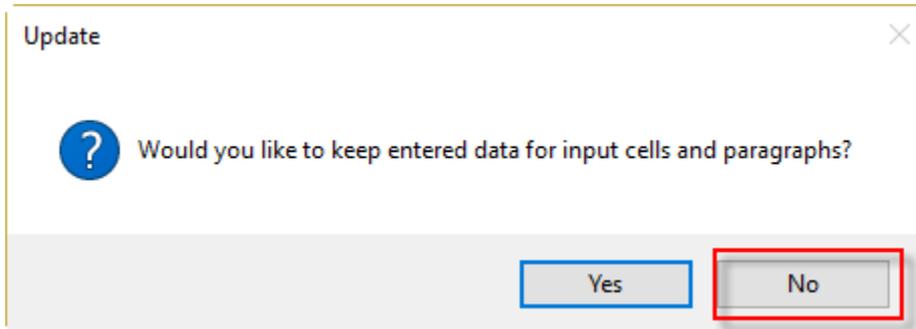
5. Select to open IR4 2016 return



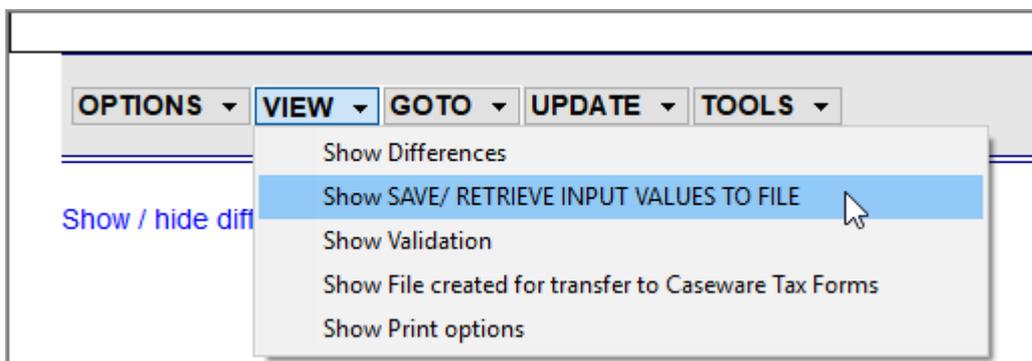
- a. From Toolbar Select **UPDATE..From Library Section – Update Everything**



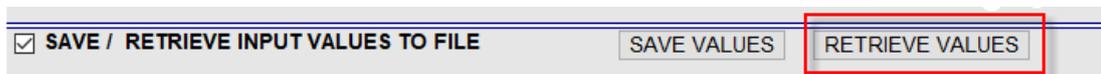
At the message “Would you like to keep entered data for input cells and paragraphs?” select “No”



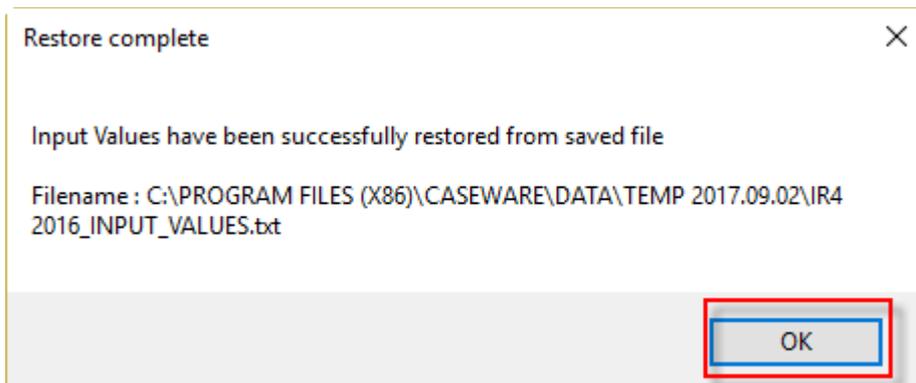
b. Select VIEW - Show SAVE/RETRIEVE INPUT VALUES TO FILE



c. Select RETRIEVE VALUES



At the message “Input Values have been successfully restored from saved file” click OK



The file is now ready with the updated IR4 2016 return