



CMS SYSTEMS SOLUTIONS
CASEWARE AUTHORISED DISTRIBUTOR

Procedure for updating client files with IR4 2017 return



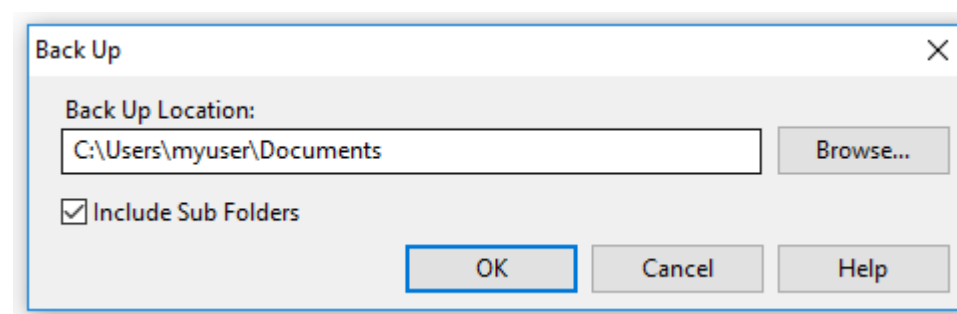
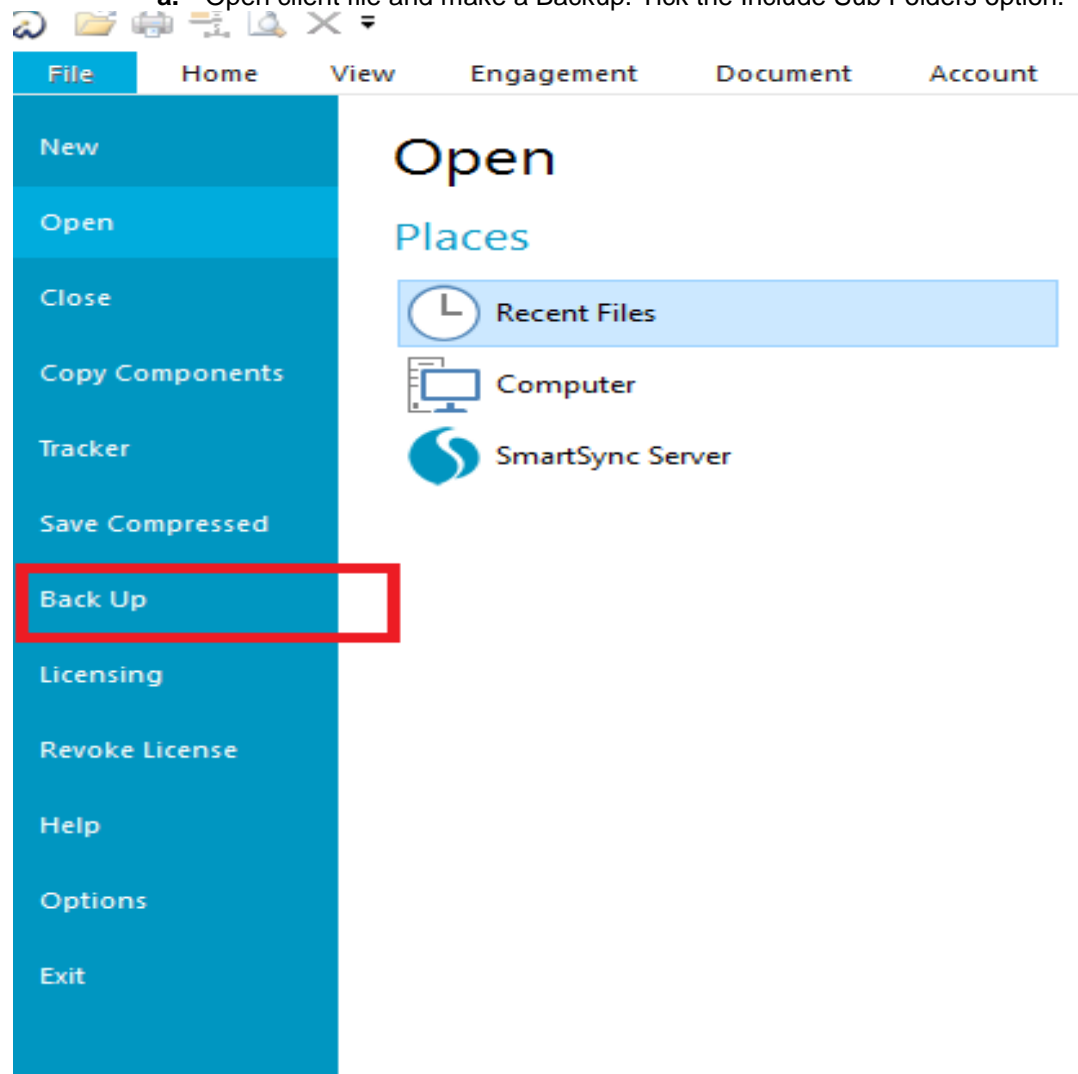
VERSION 6.00

PROCEDURE SUMMARY

1. **Backup client file.....3**
2. **Copy updated components from the Template into the client file.....4**

1. Backup client file

- a. Open client file and make a Backup. Tick the Include Sub Folders option.

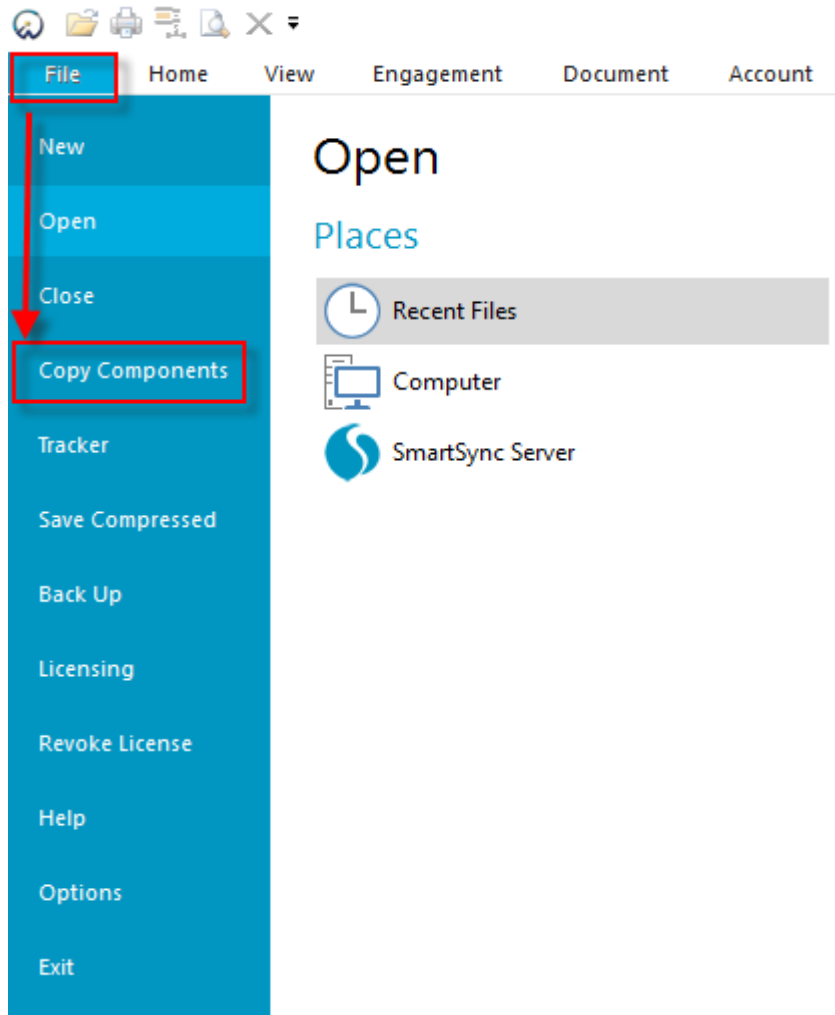


NOTE: You can use the backup in case something goes wrong in the procedure or as a fall back in case the procedure outcome is not the desired.

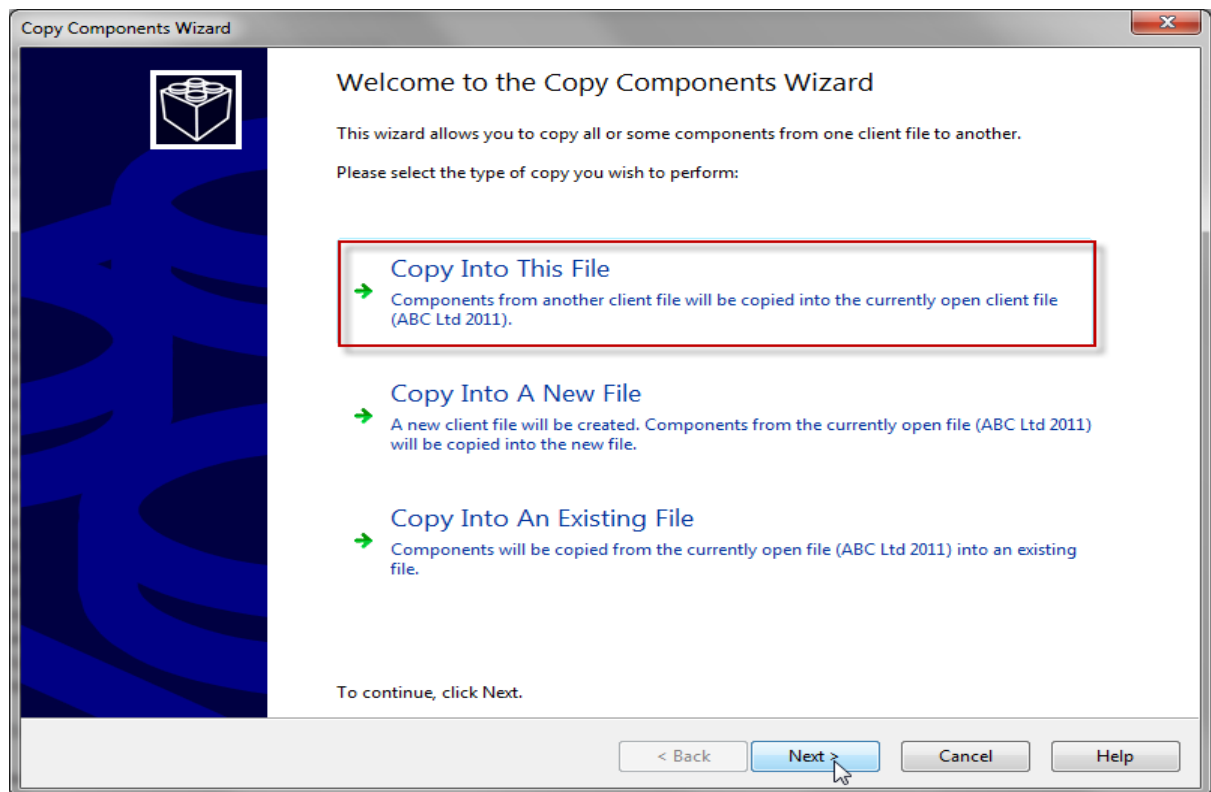
2. Copy updated components from the Template into the client file

Using the Copy Components feature, update the client file with the necessary components from the Template.

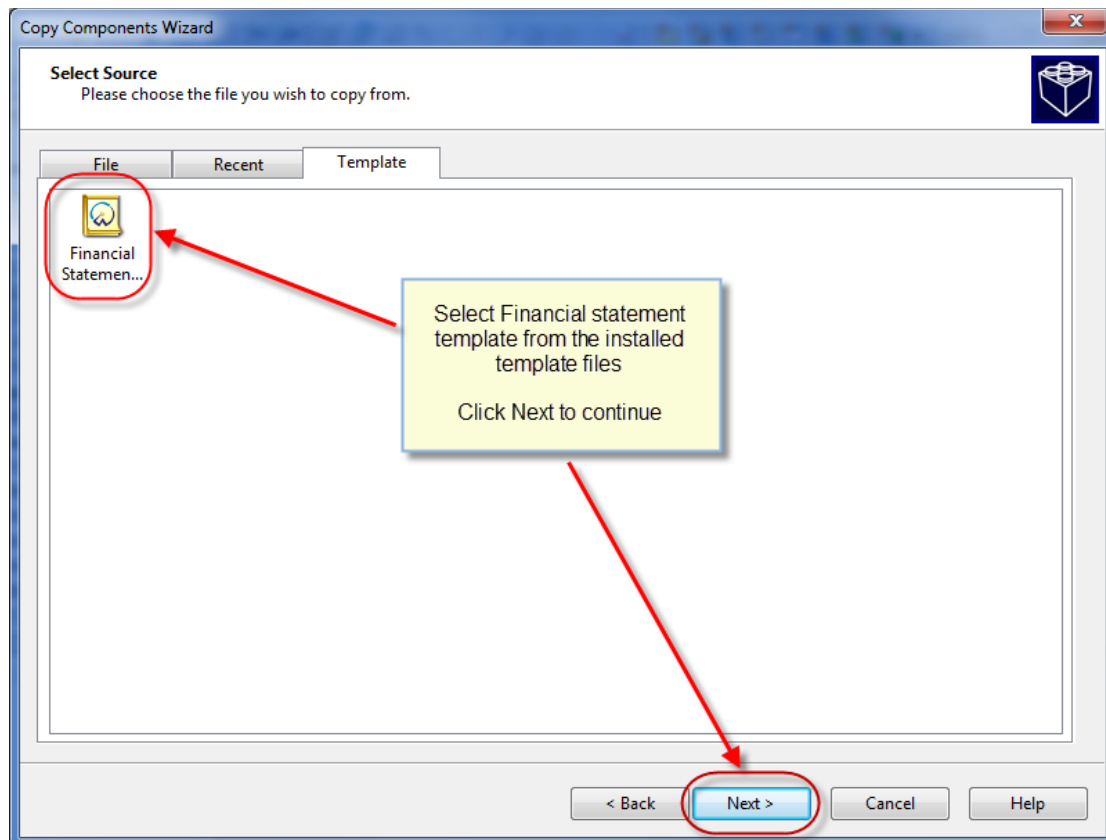
- a. Select the command **File / Copy Components**



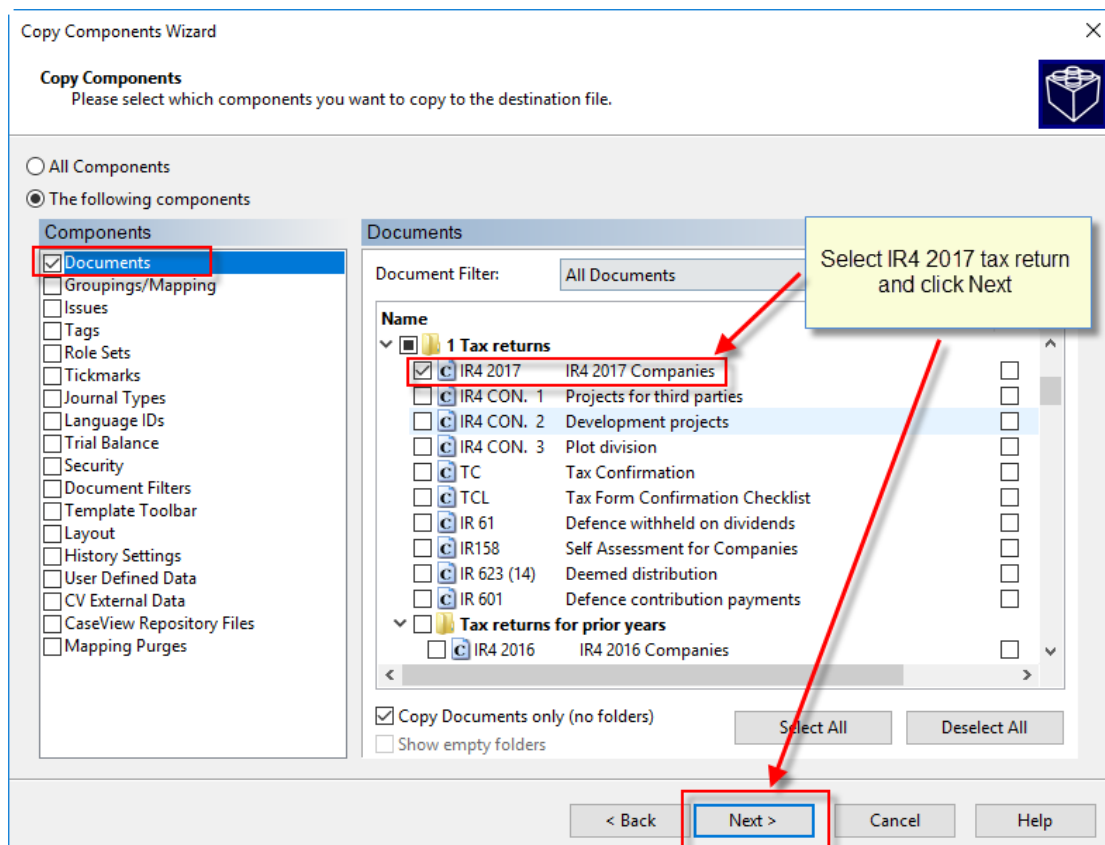
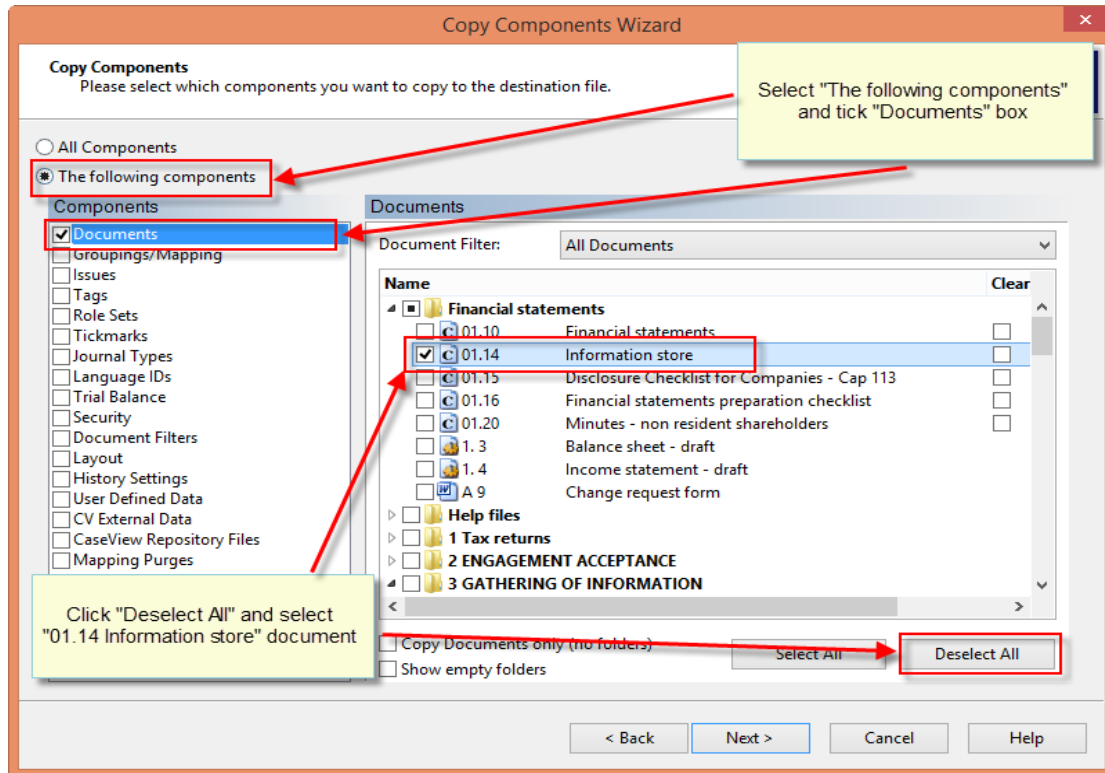
b. Select Copy into This File. Click Next.



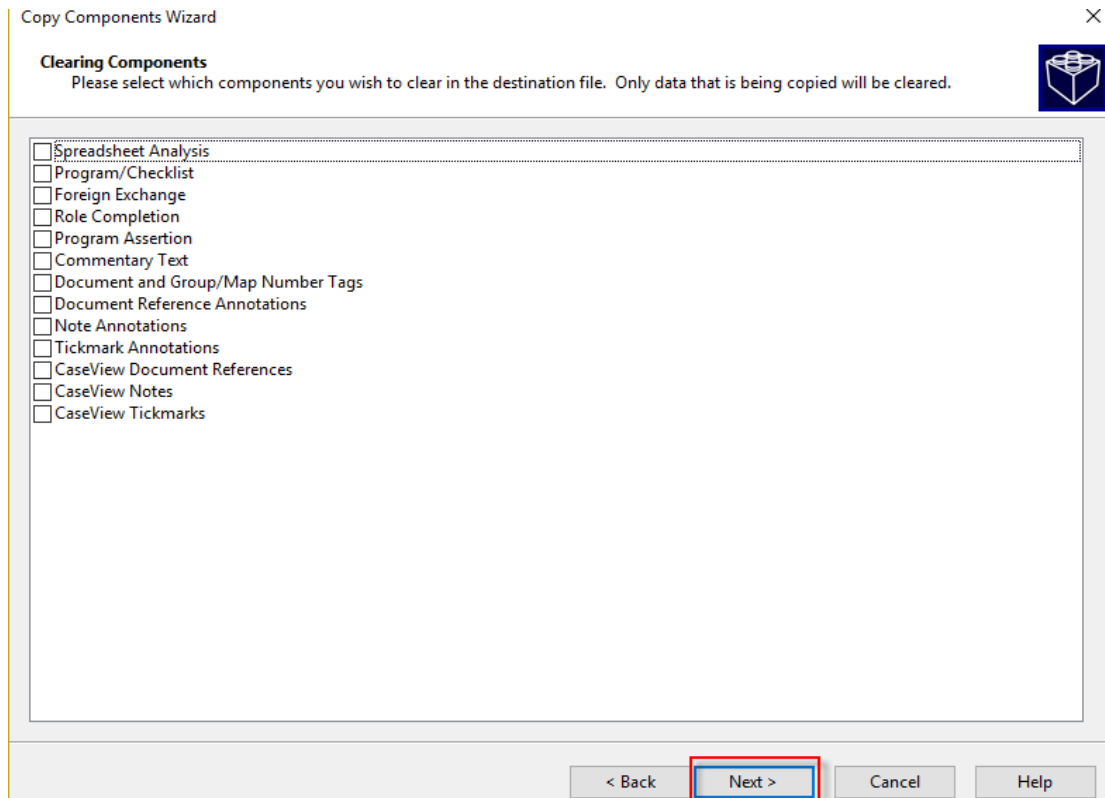
c. Choose the Financial Statements Template and click Next.



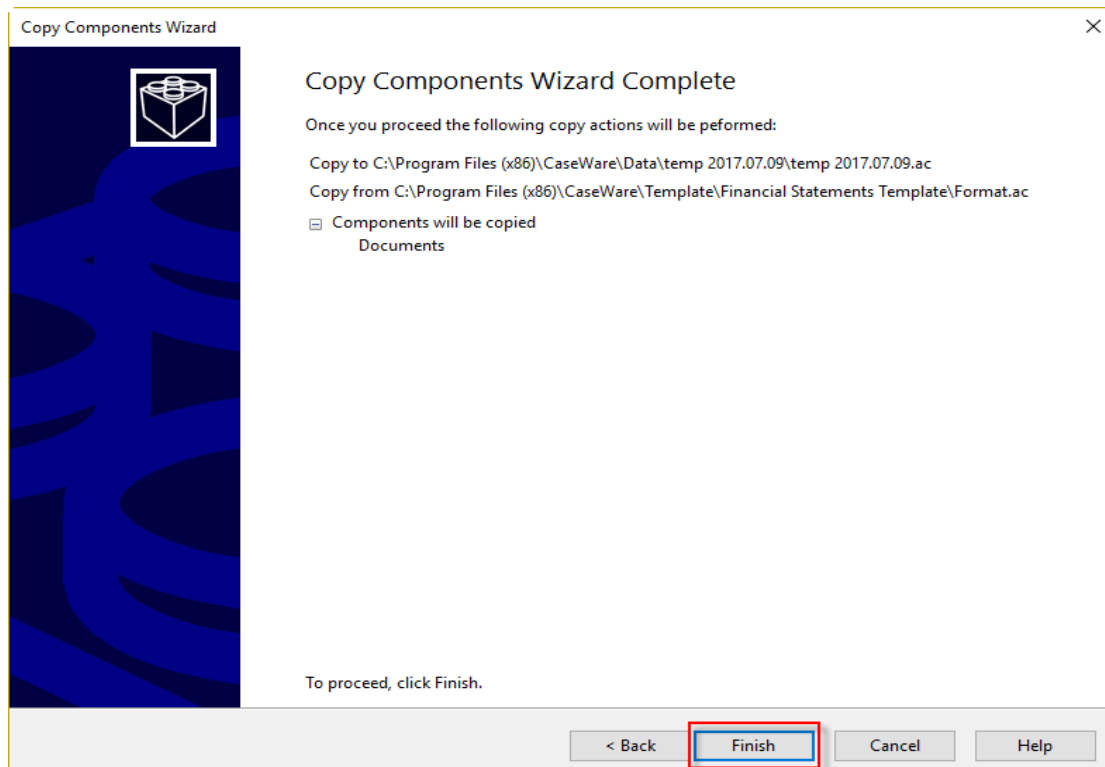
- d. Choose "The following components" and tick the Documents box. Click "Deselect All" and then select document "01.14 Information store" and "IR4 2017 Tax return".



- e. On Copy Components Wizard choose Next to continue



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



The file is now ready for the preparation of the IR4 2017 return.