Procedure for updating prepared IR4 return

VERSION 1.00

PROCEDURE SUMMARY

1. **Open Caseware Client File**

      a. Open Caseware Working Papers and either select your file form the Recent files list (if this has been recently opened) or click **Computer** to select the file from your computer or server.
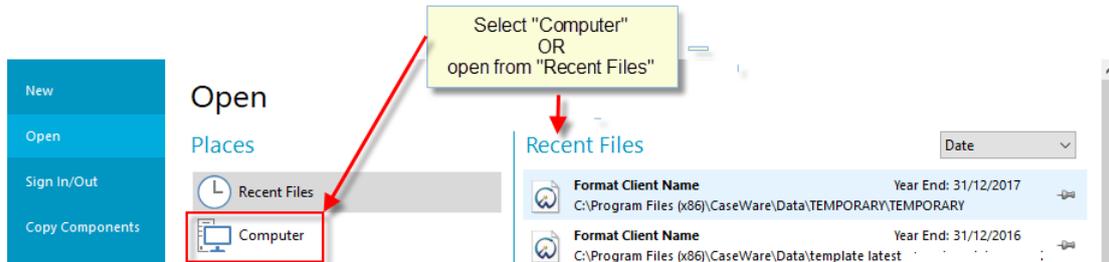
2. **Select to Back Up file**

      a. Select **File / Back Up**
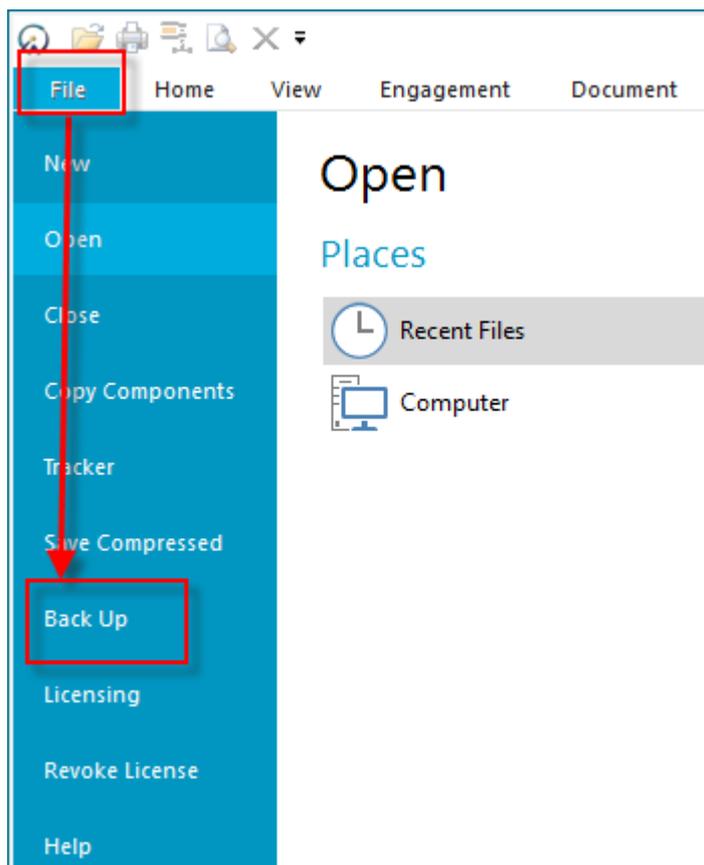
NOTE: CLOSE ALL DOCUMENTS BEFORE PROCEEDING

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
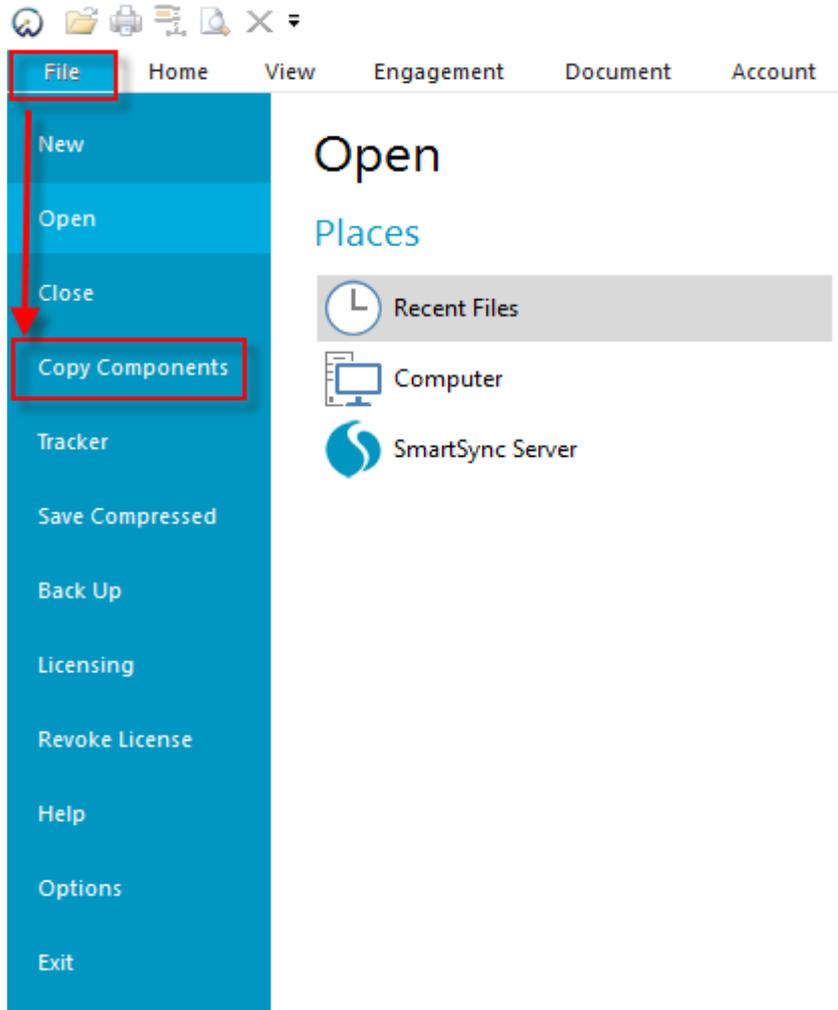
b. Select Copy into This File. Click Next.
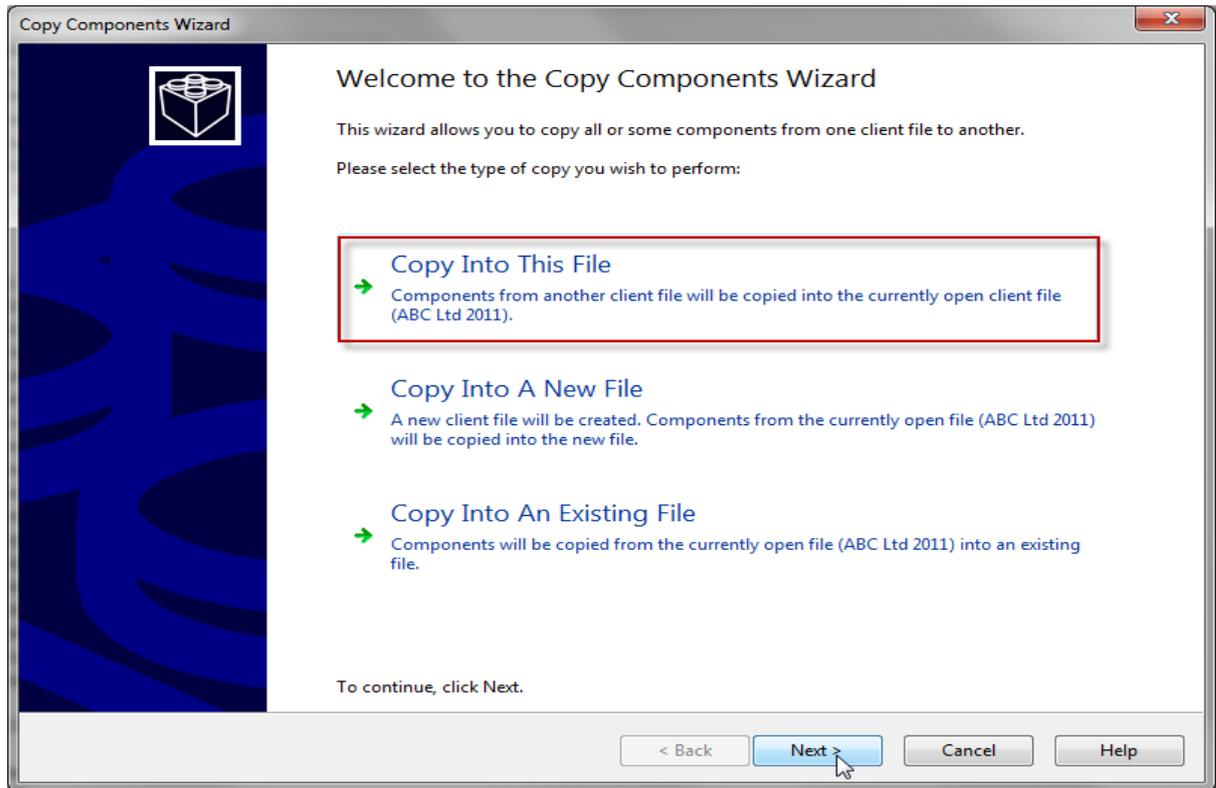
c. Choose the Financial Statements Template and click Next.

Note make sure that the Financial Statements template is the most update one. If not then follow the procedure to download and then to install the Financial Statements Template.
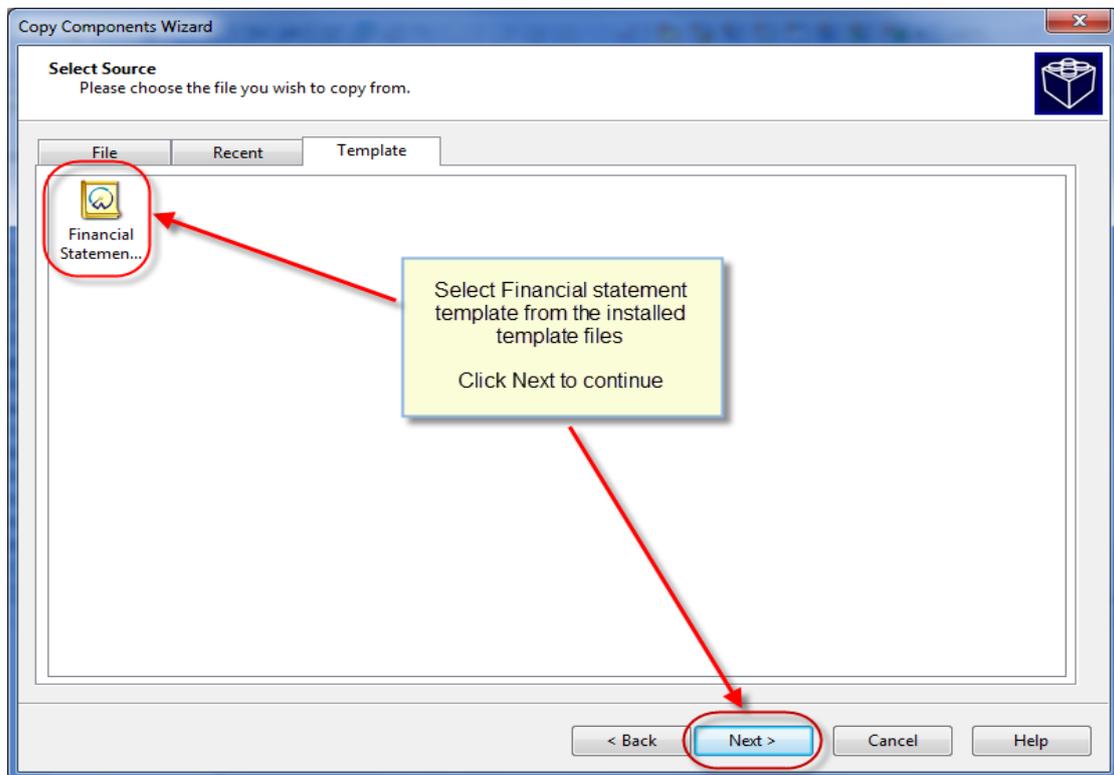
d. Choose "The following components" and tick the Documents box.
Click "Deselect All" and then select document "01.14 Information store".
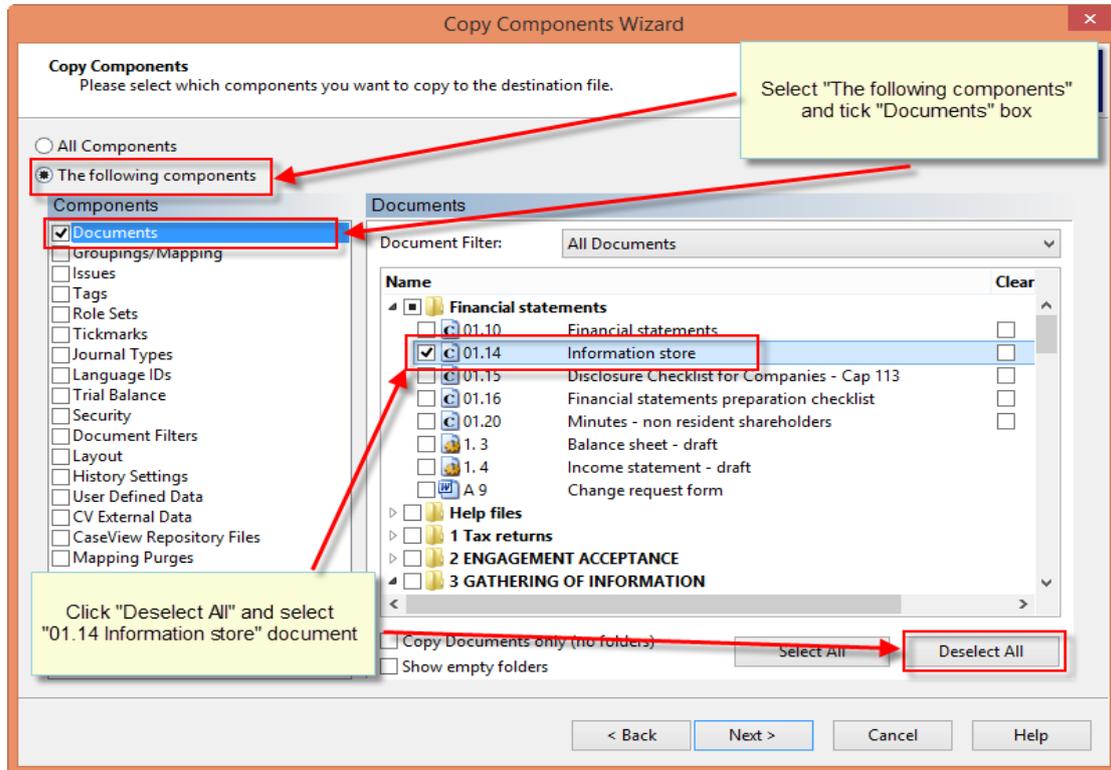
e. On Copy Components Wizard choose Next to continue
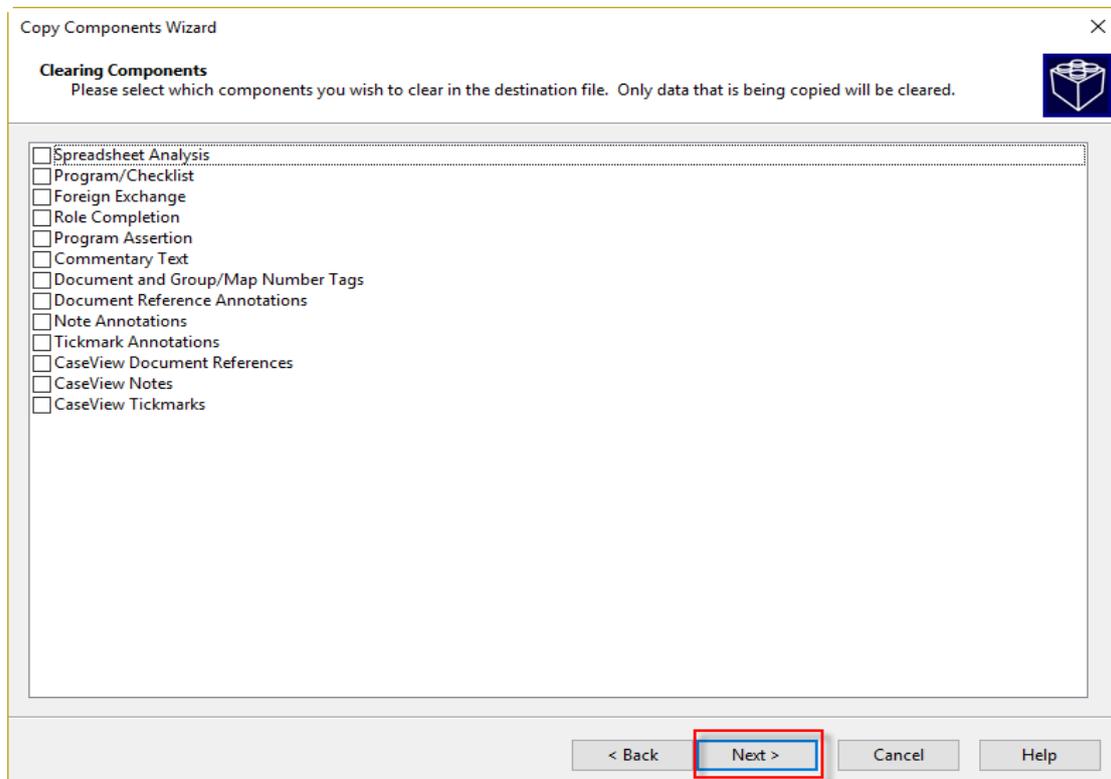
f. Click Finish to complete the Copy Components wizard.
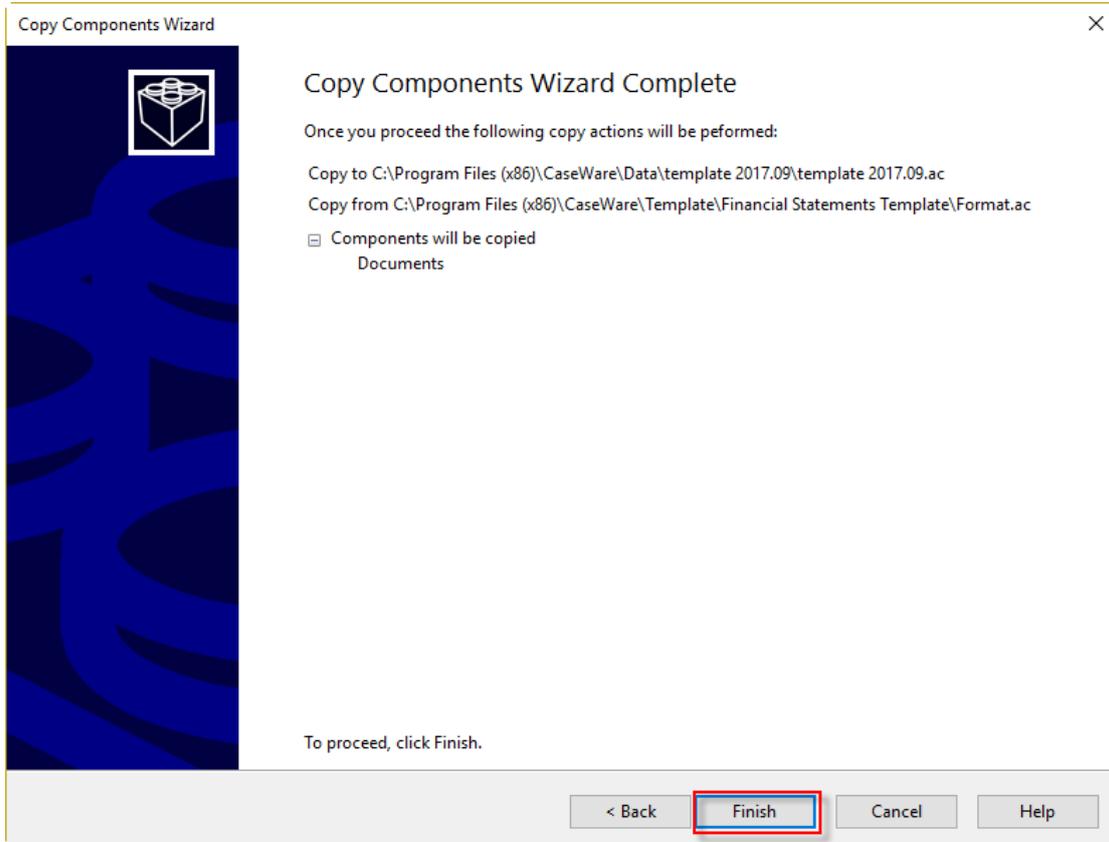
4. Select to open 01.14 Information store
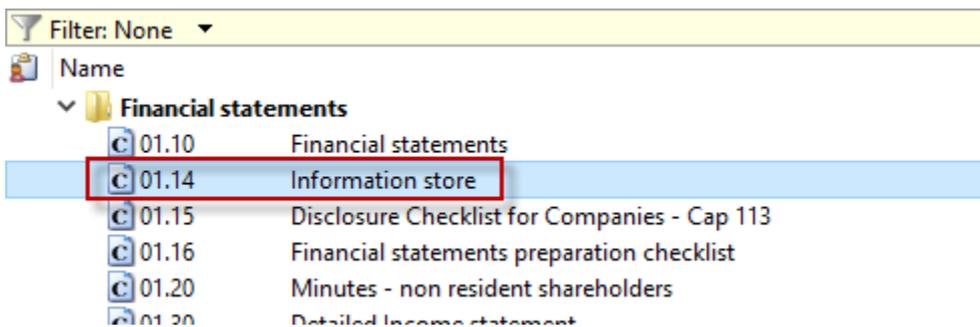
a. Check if your Library path is correct.
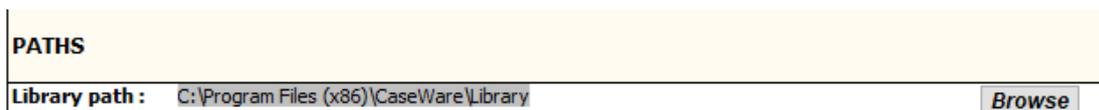
b. In UPDATES TO DOCUMENTS section select return e.g. IR4 2016 document. Click on the button to UPDATE IR4 2016

c. Select to SAVE document
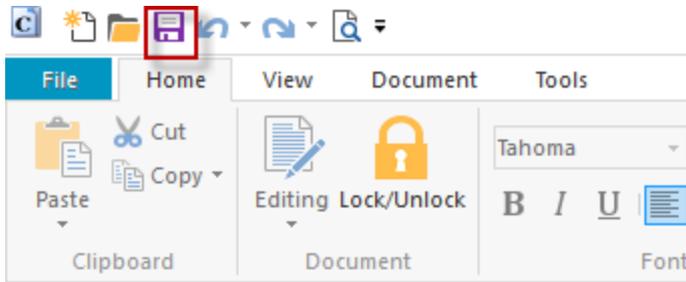
IMPORTAND NOTE: This option will perform an update of the specified document in one step. The process will SAVE any INPUT values, update the document from the latest library and then RETRIEVE your INPUT values, all in one step.

The file is now ready with the updated IR4 return