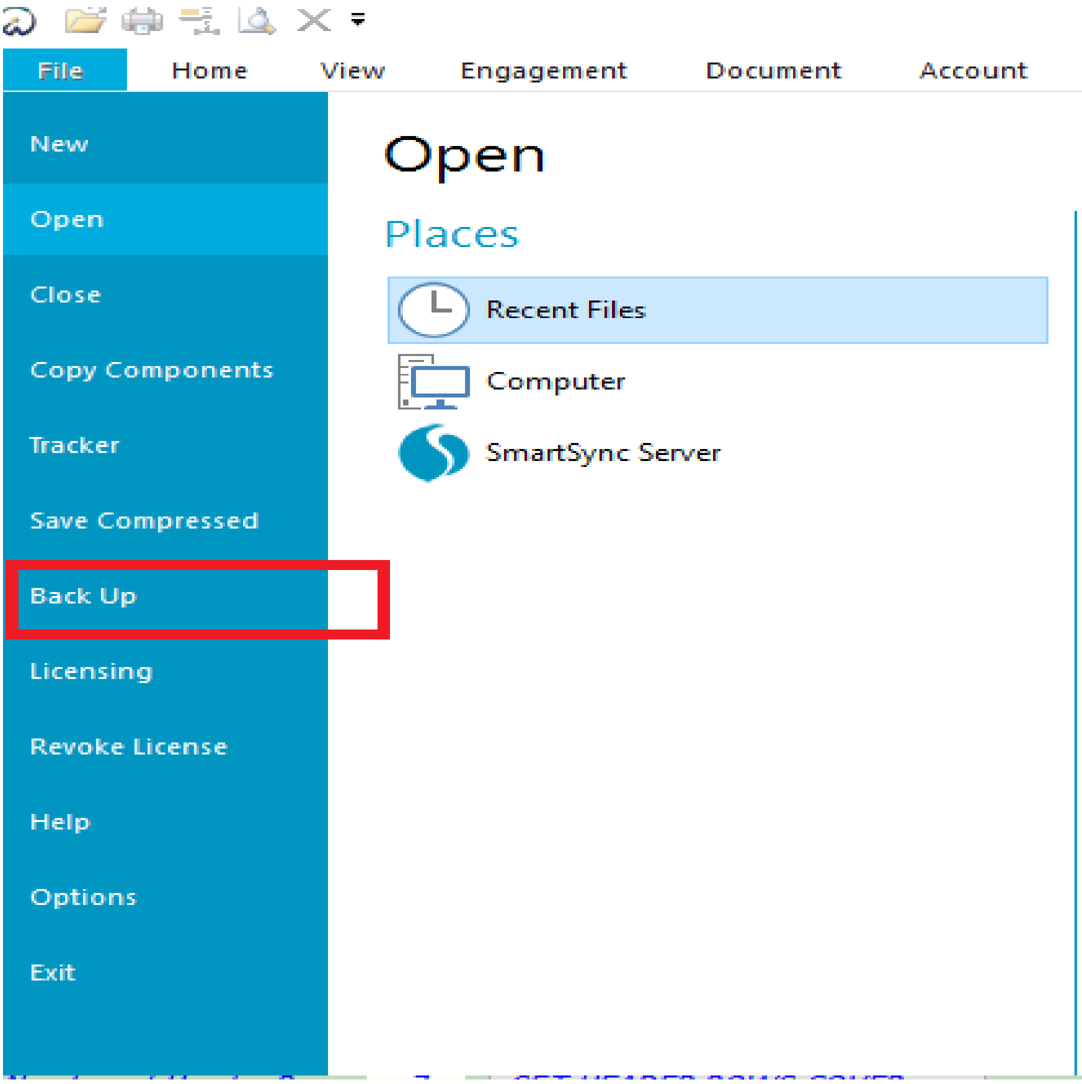
Procedure to include IR4 Tax Return

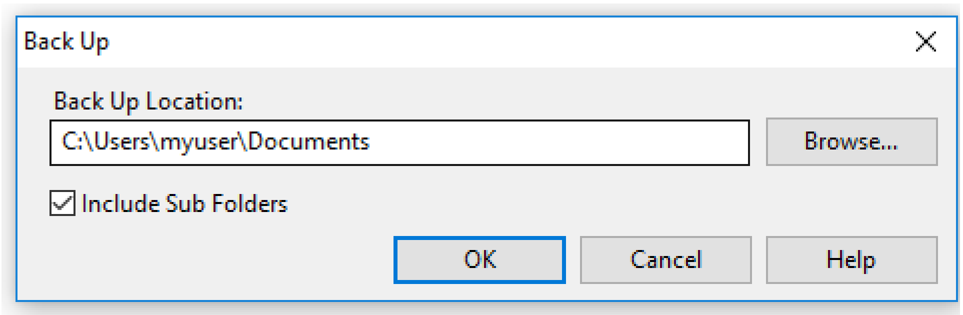
VERSION 1.00

PROCEDURE SUMMARY

1. Backup client file

a. Open client file and proceed with Backup. Tick the Include Sub Folders option.



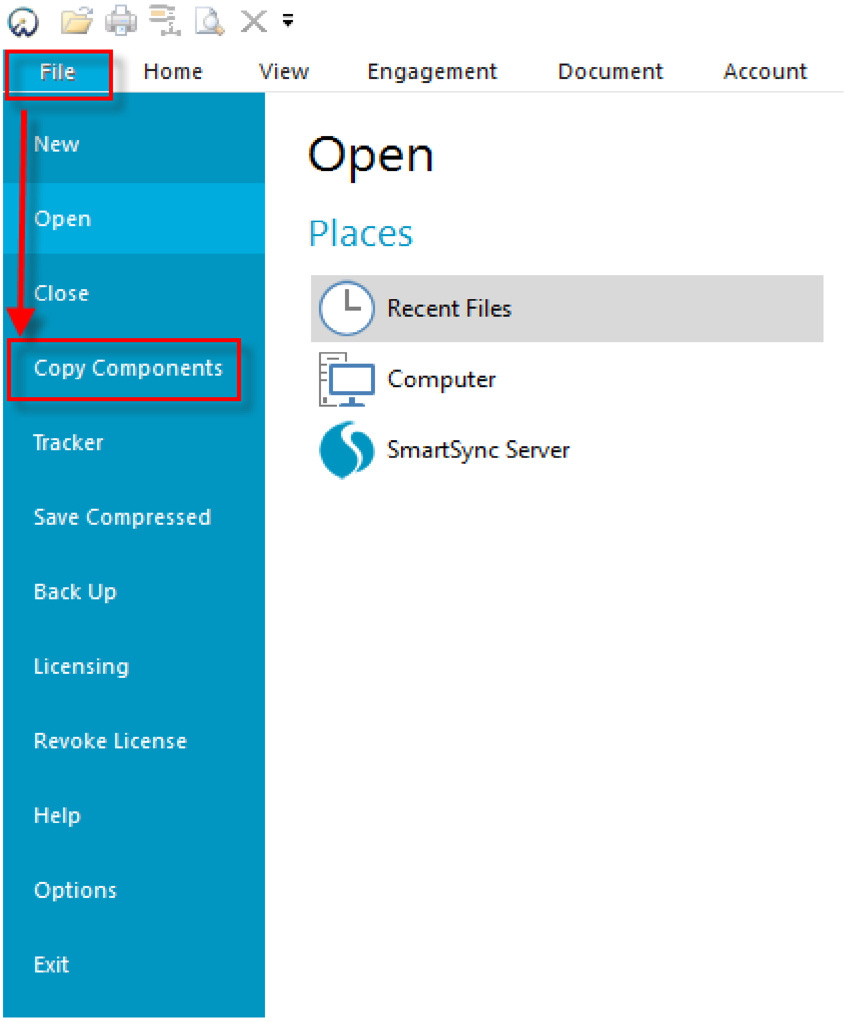


NOTE: *You can use the backup in case something goes wrong in the procedure or as a fall back in case the procedure outcome is not the desired.*

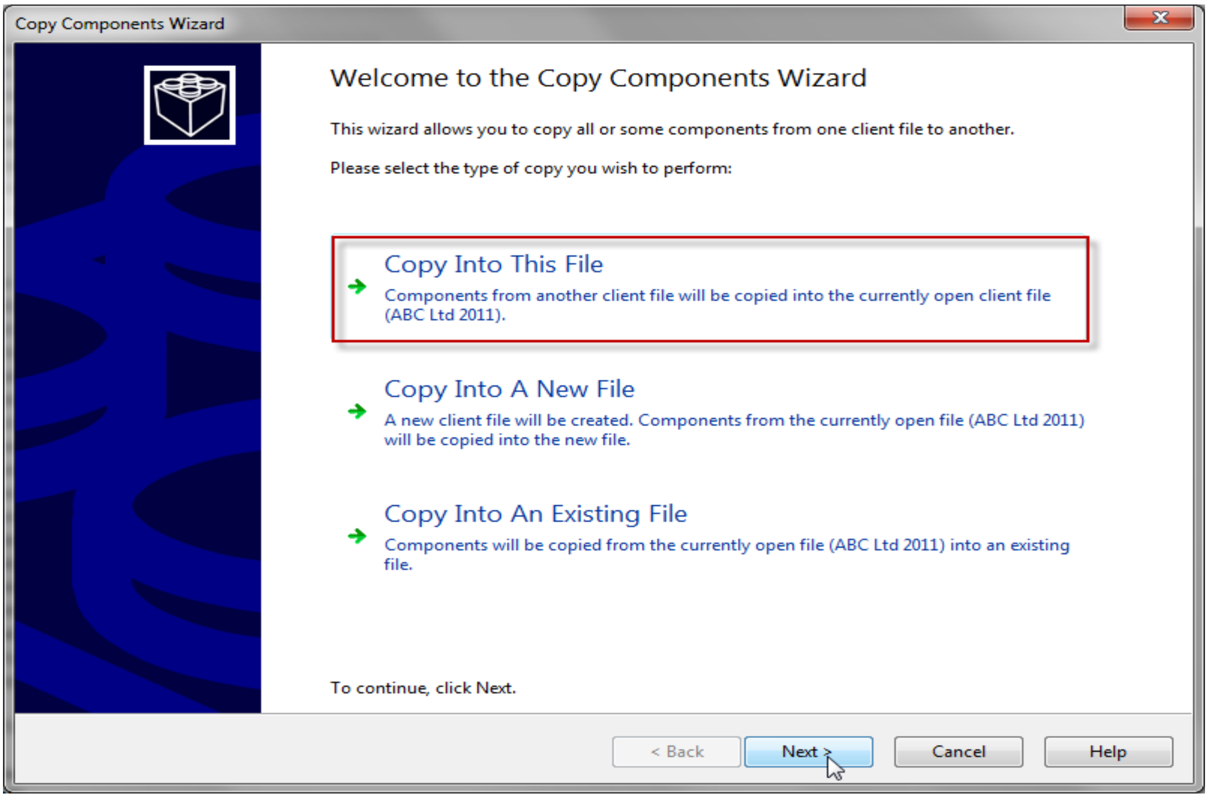
2. Copy updated components from the Template into the client file

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

a. Go to **File / Copy Components**

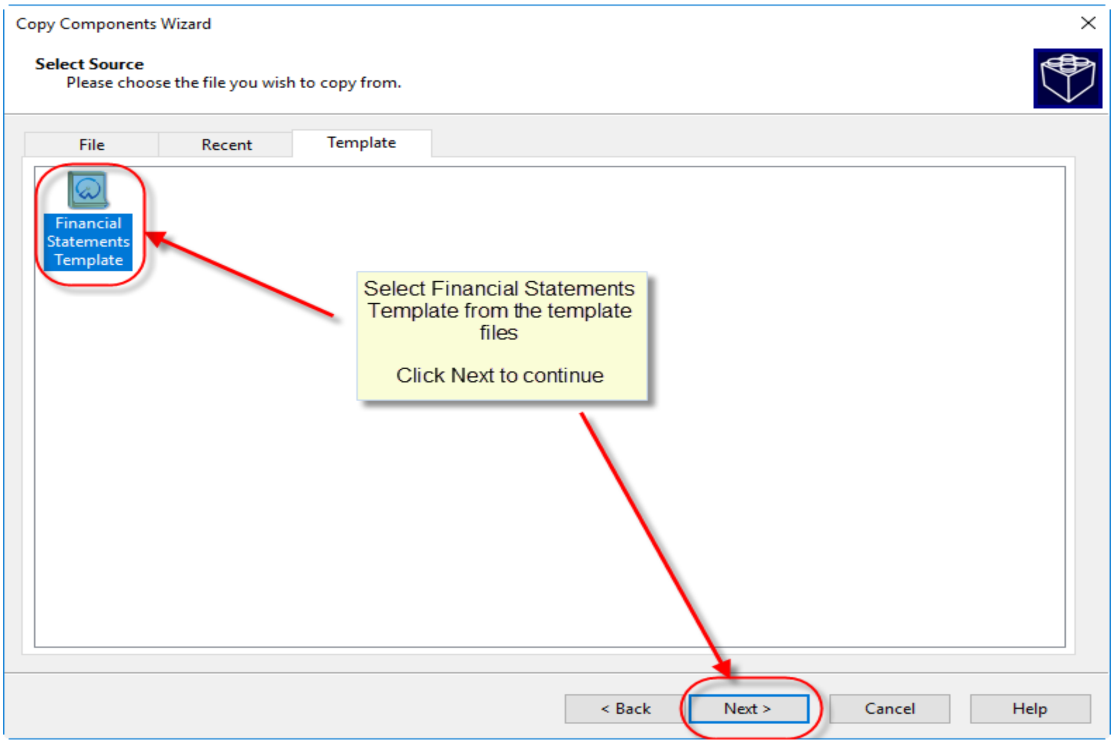


b. Select Copy into This File. Click Next.

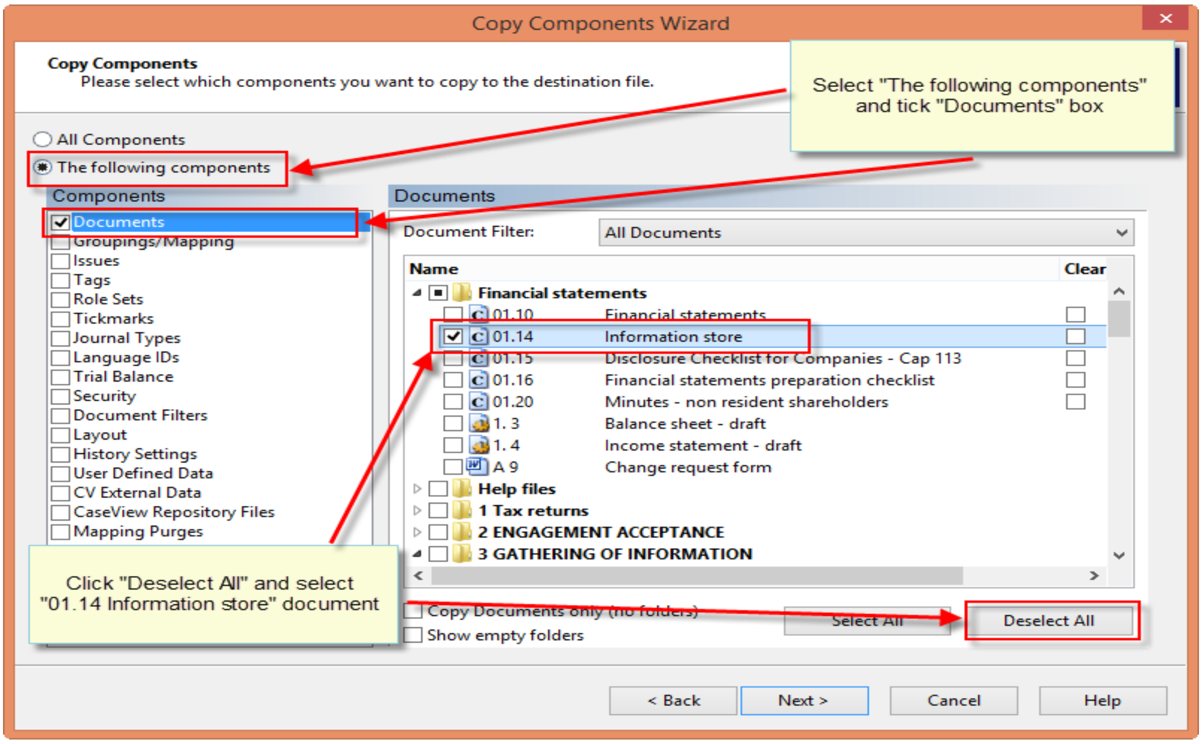


c. Choose the Financial Statements Template and click Next.

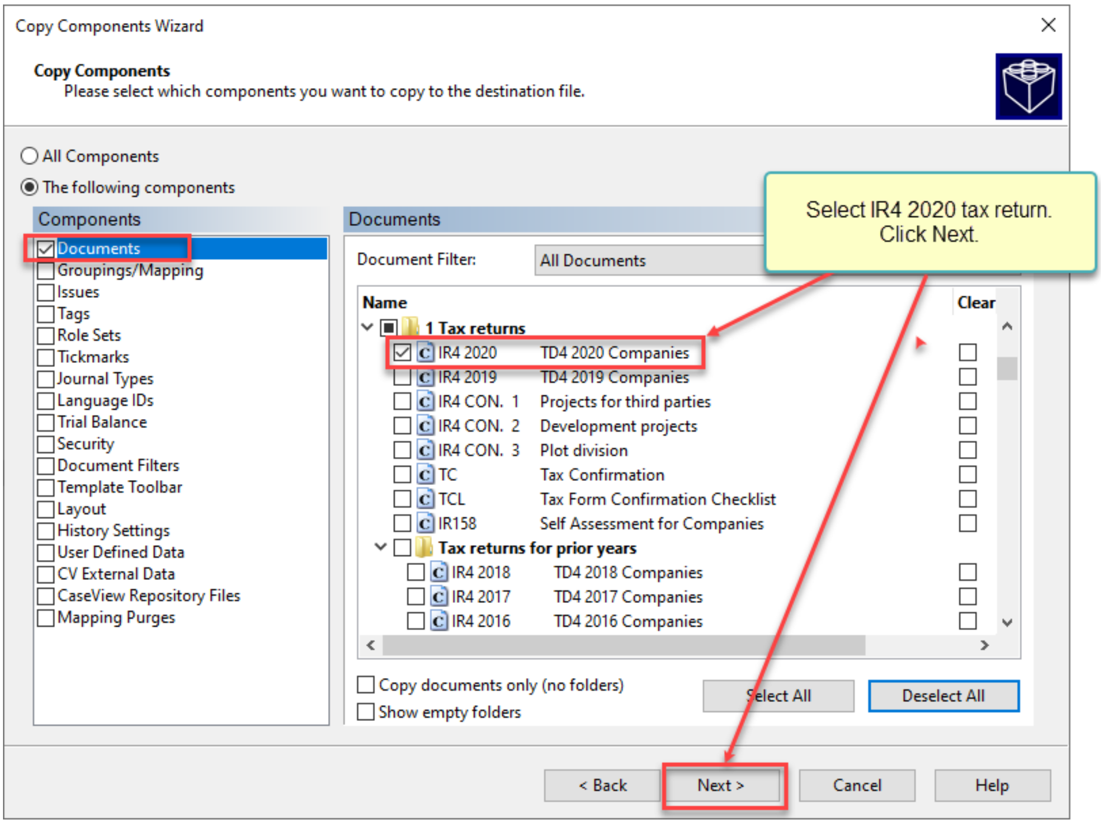
Note: *Make sure that the Financial Statements template is the latest one. You can check this by selecting the Financial Statements Template icon right click and select properties, compare the version installed with the version as per our website. If this are the same proceed and select the Financial Statements Template. If not then follow the procedure to download and then to install the Financial Statements Template.*



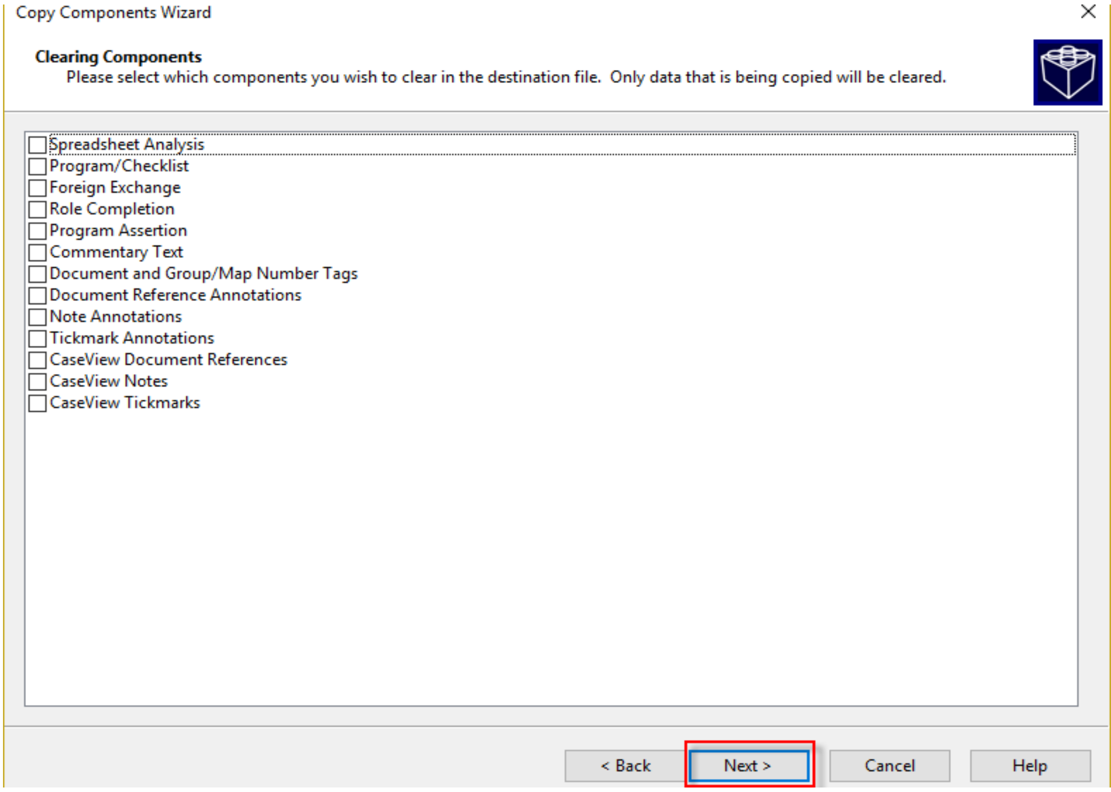
d. Choose “The following components” option and tick the Documents box. Click “Deselect All” and then select document “01.14 Information store” and “IR4 Tax return”. Click Next.



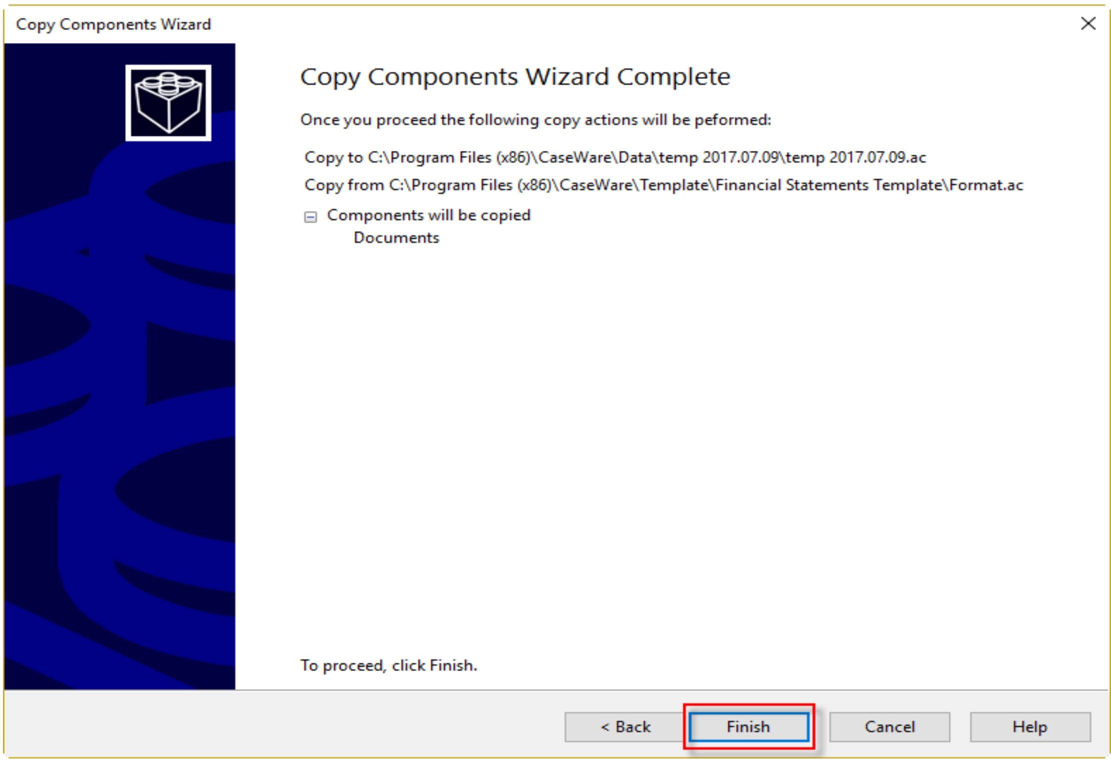
Note: *Depending the year of your engagement file select the appropriate tax return e.g. IR4 2020.*



e. On Copy Components Wizard choose Next to continue.



f. Click Finish to complete the Copy Components wizard.



The file is now ready with the latest version of the IR4 return.