



**CMS SYSTEMS SOLUTIONS**

CASEWARE AUTHORISED DISTRIBUTOR

# **Procedure of Copy Components from the template to the client file**



VERSION 6.00

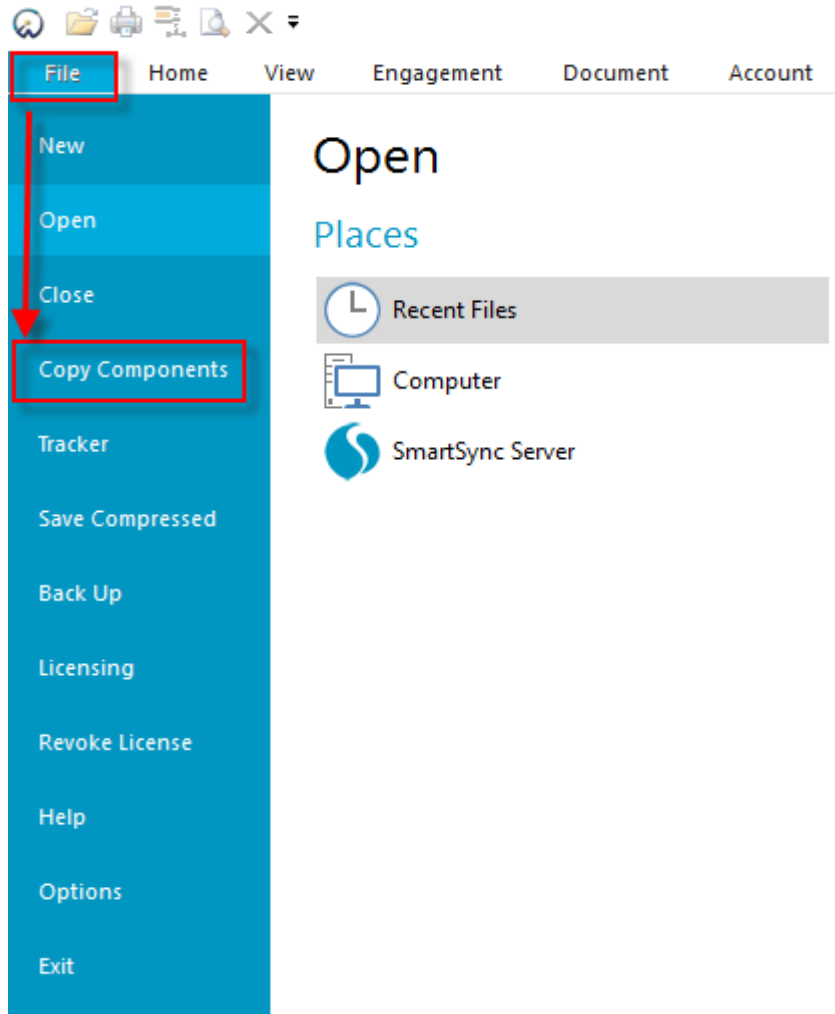
## **PROCEDURE SUMMARY**

1. **Copy components from the Template into the client file ..... 3**

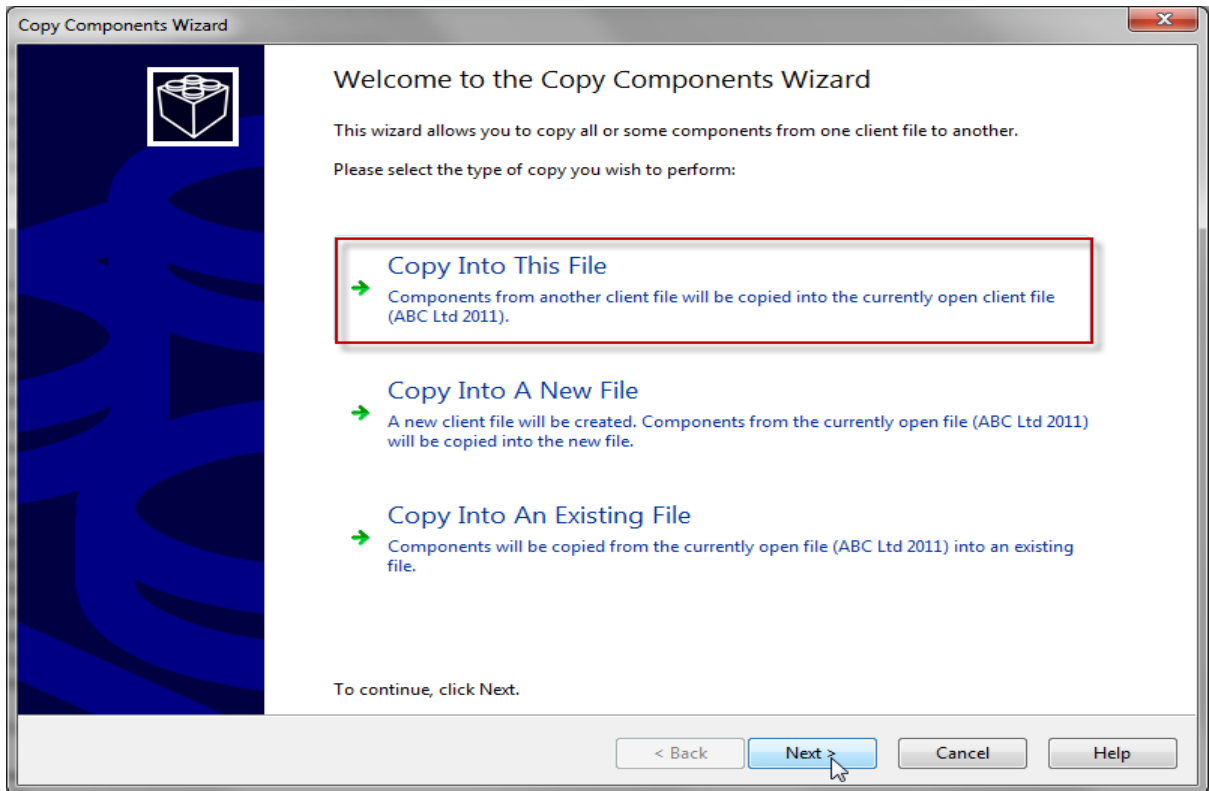
### 1. Copy components from the Template into the client file

Using the Copy Components feature, update the client file with the necessary components from the Template. Information Store, Tax returns and Mappings Structure.

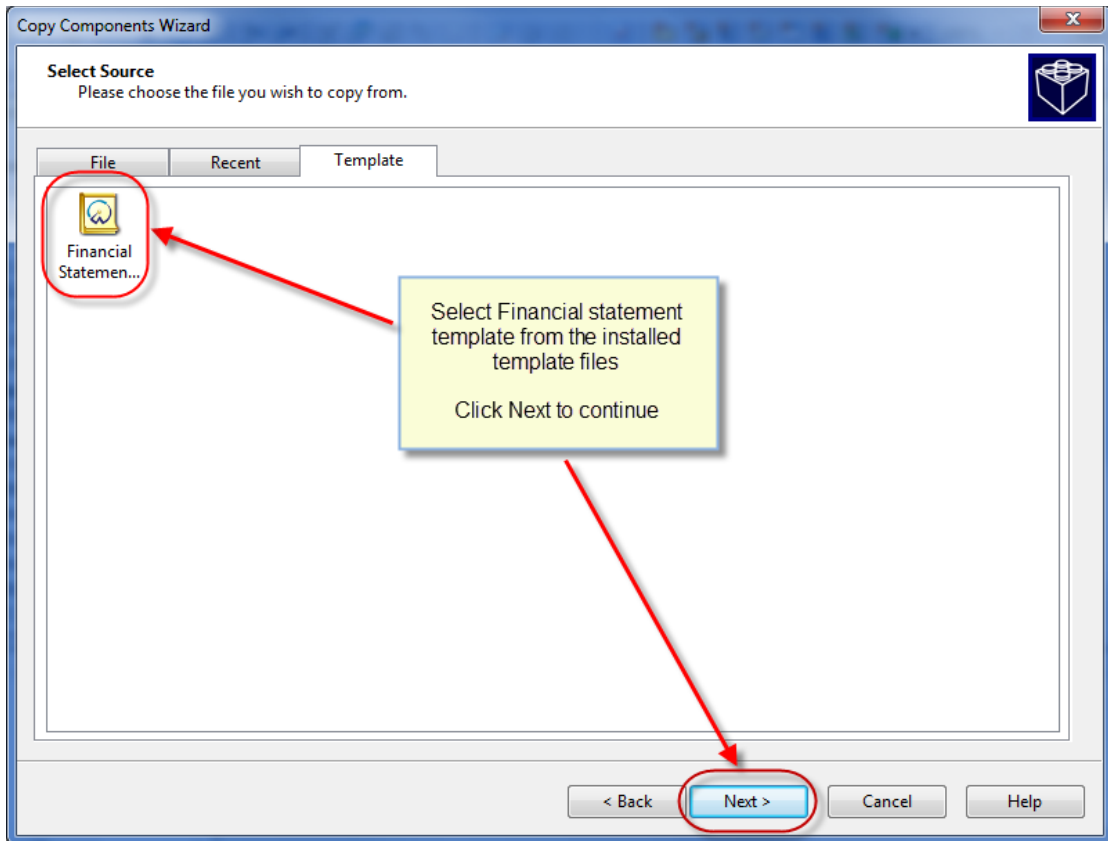
- a. Select the command **File / Copy Components**



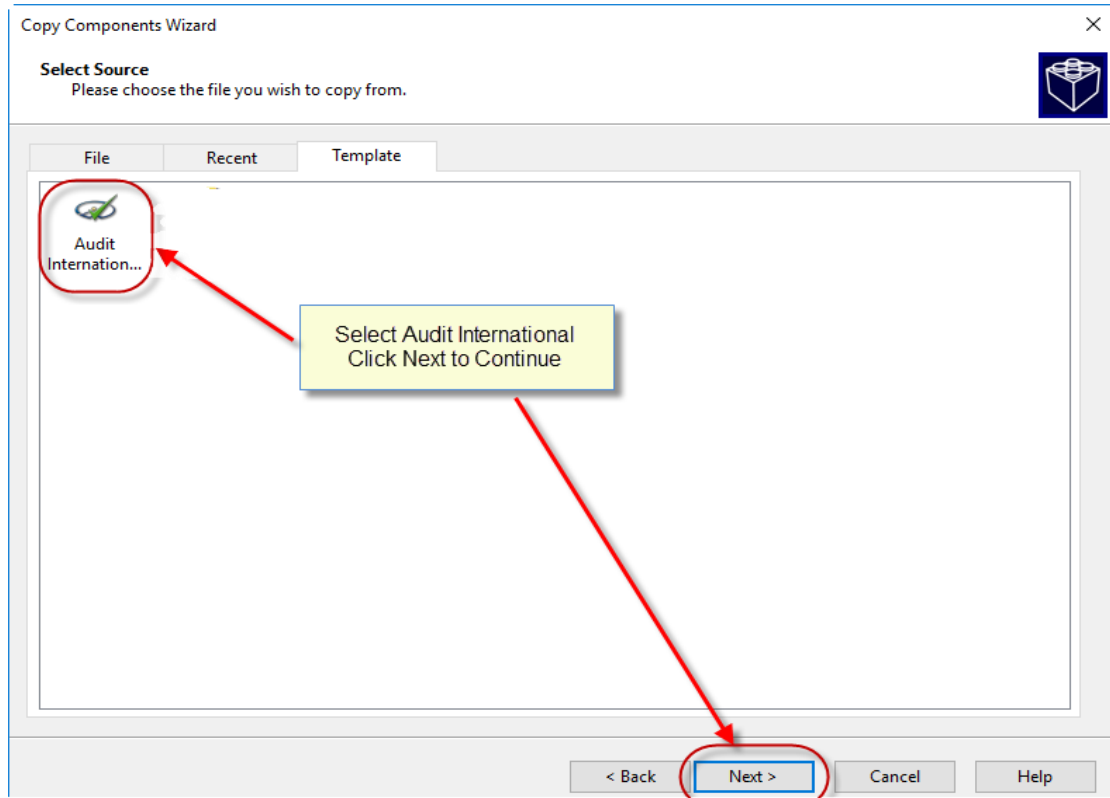
b. Select Copy into This File. Click Next.



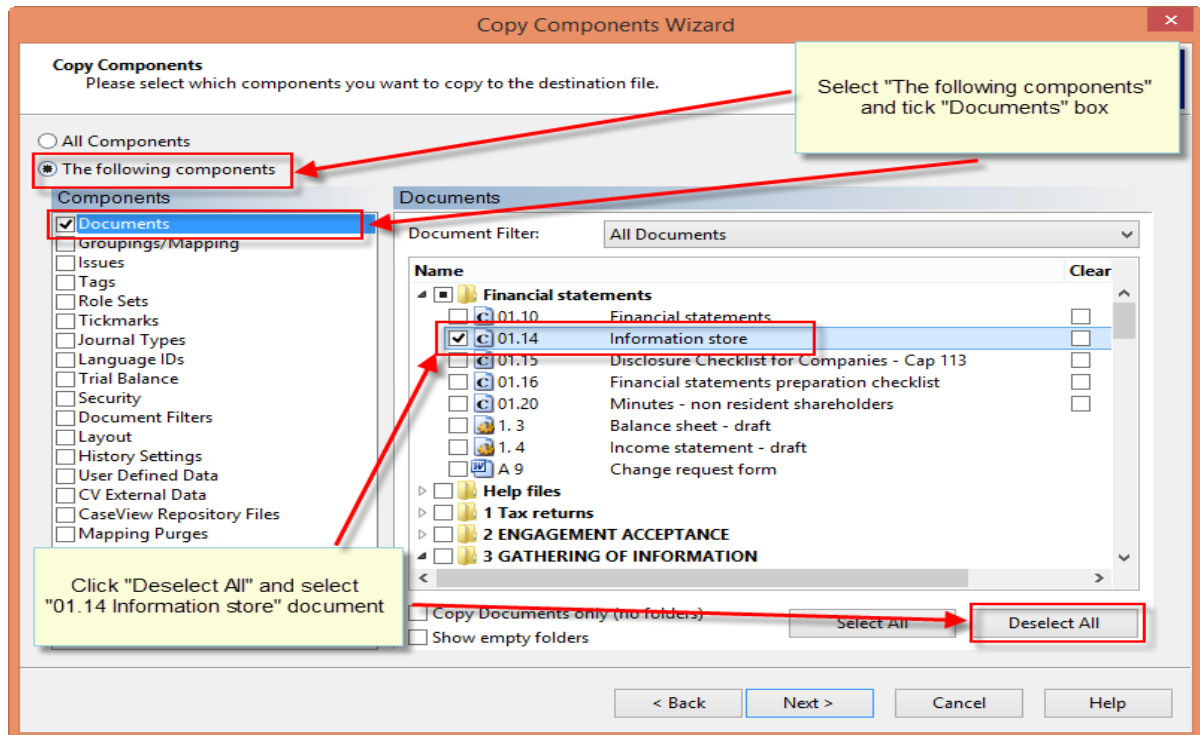
c. Choose the Financial Statements Template and click Next.



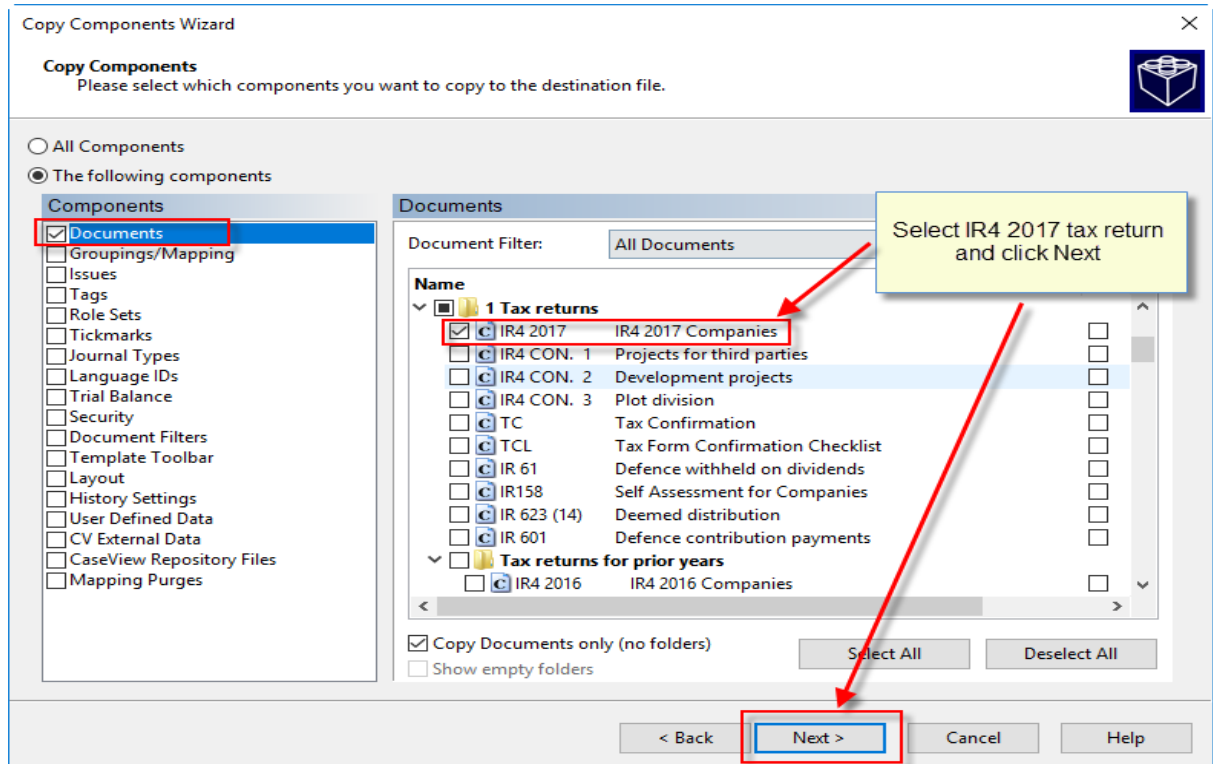
**NOTE: In the case the file is based on Audit International Template select Audit International icon**



- d. In the Copy Components Wizard select "The following components" and the "Documents" box. Click "Deselect All" and then select document "01.14 Information store".

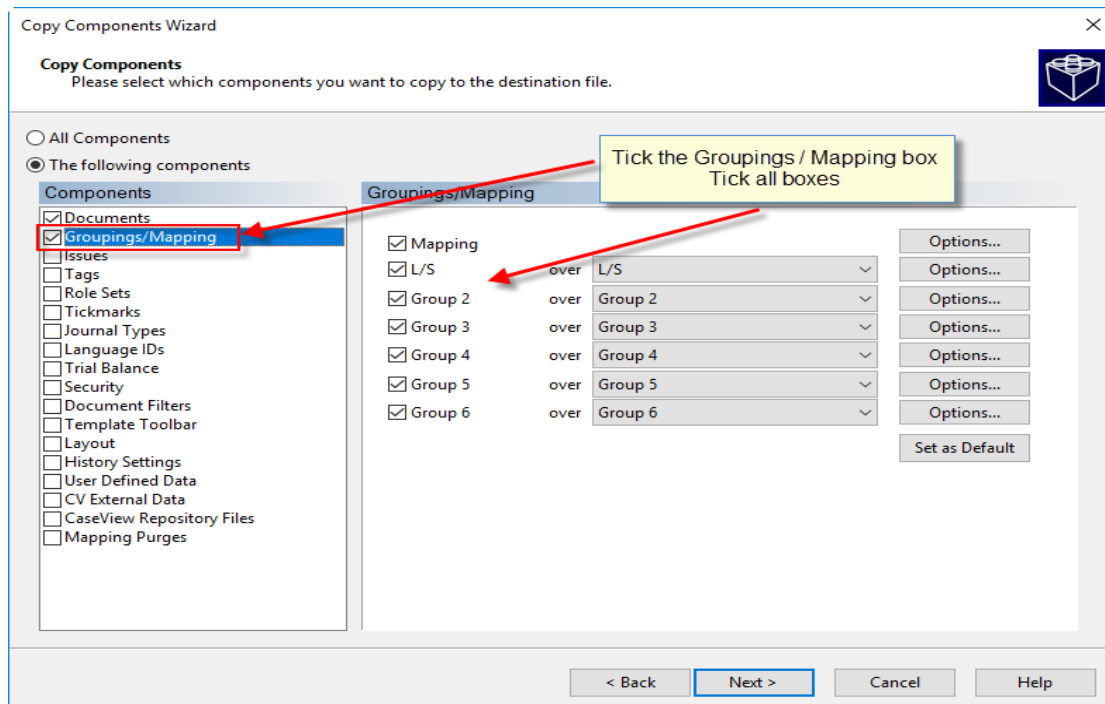


**Note:** Depending the year of your engagement file select the appropriate tax return e.g. IR4 2017.

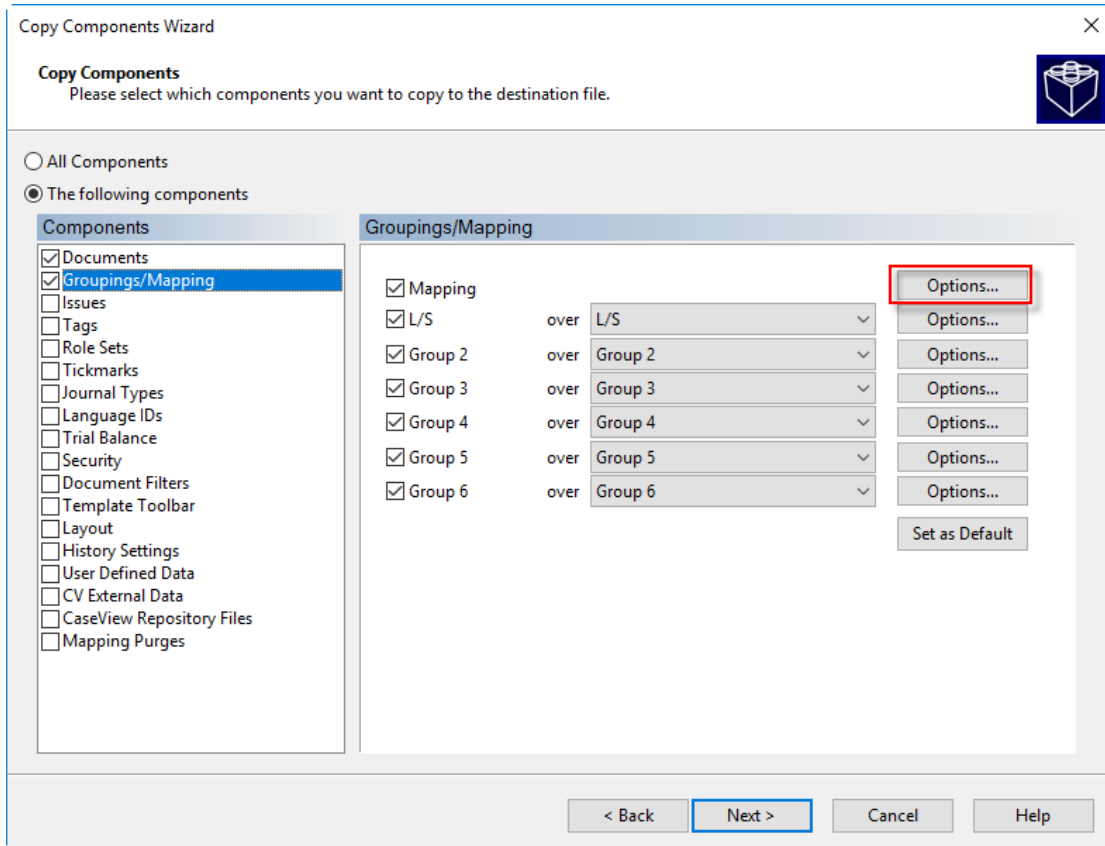


e. In the same Copy Components Wizard, update the mapping structure from the latest Template.

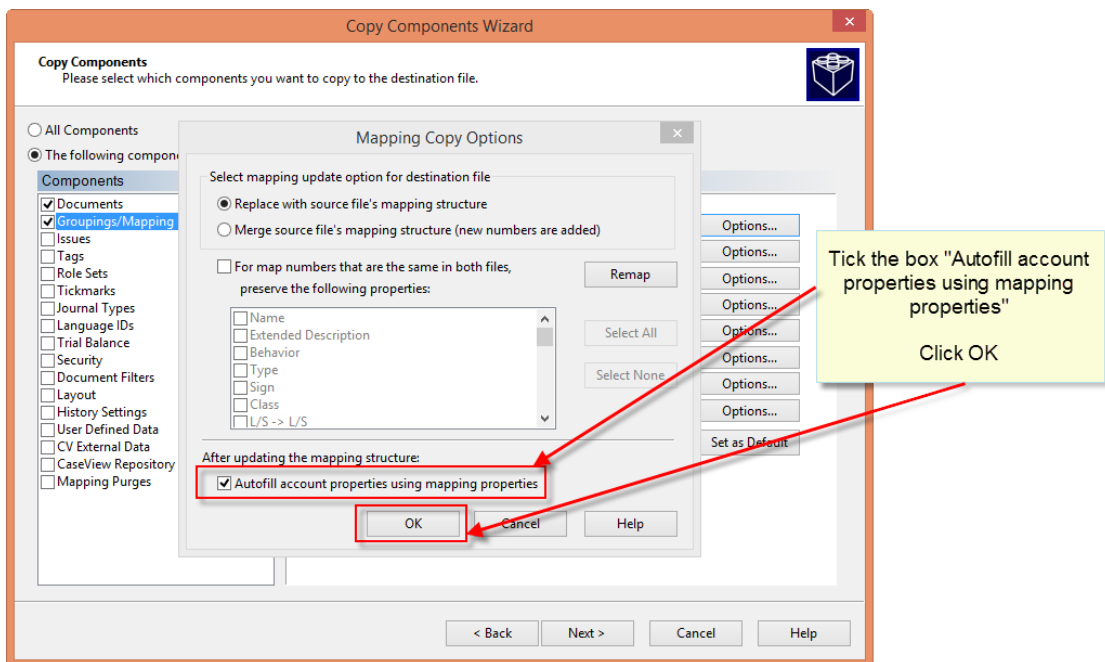
Tick the Grouping / Mapping box. Tick all Boxes.



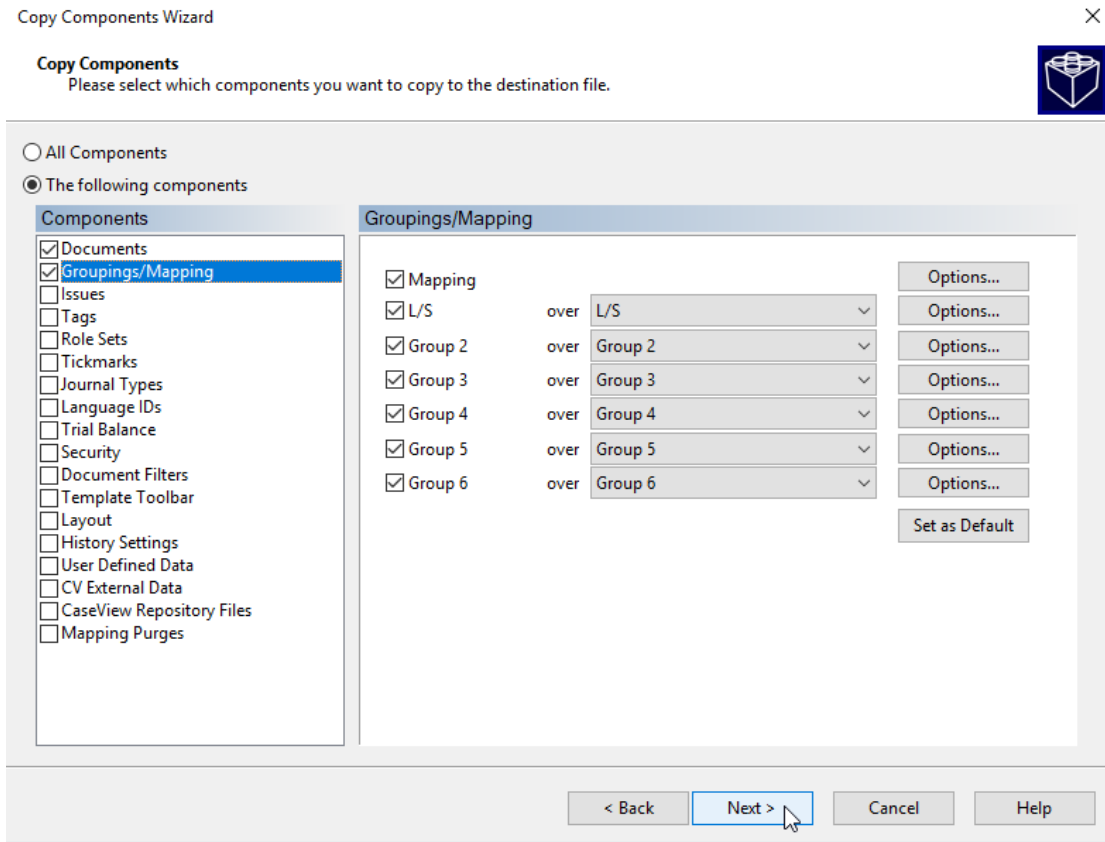
f. Select Options



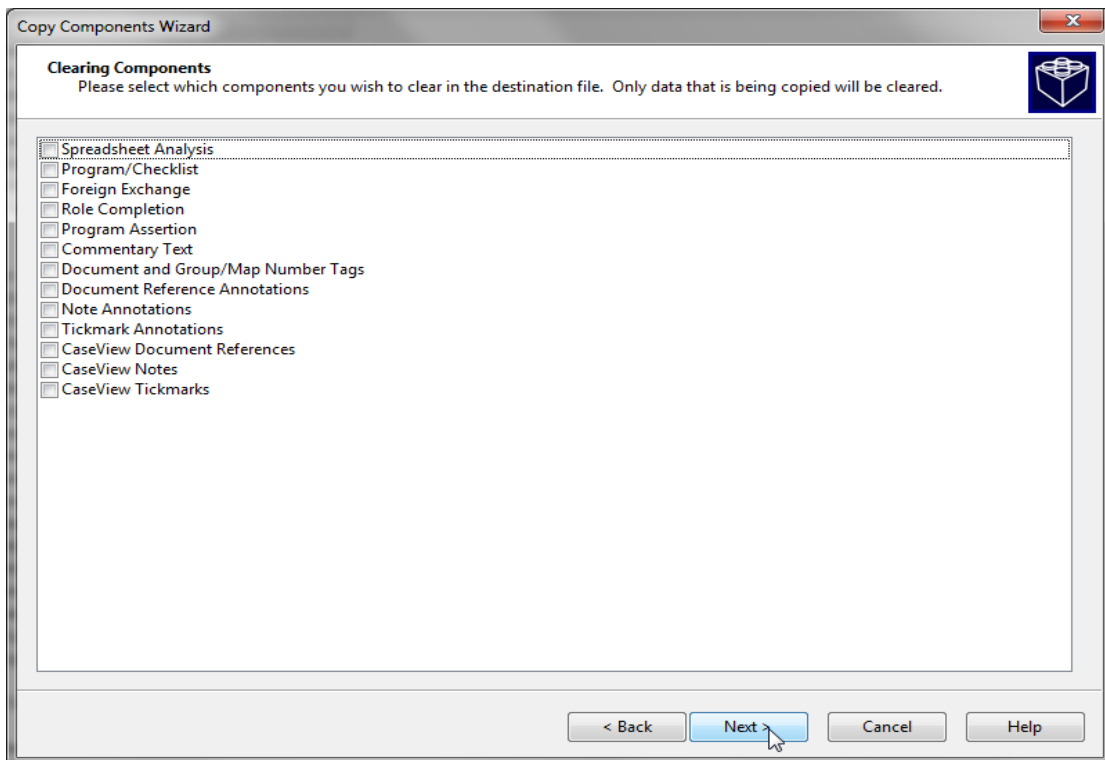
g. Tick the box "Autofill account properties using mapping properties".  
Choose  to perform Mapping Copy Options.



**h. Click Next**

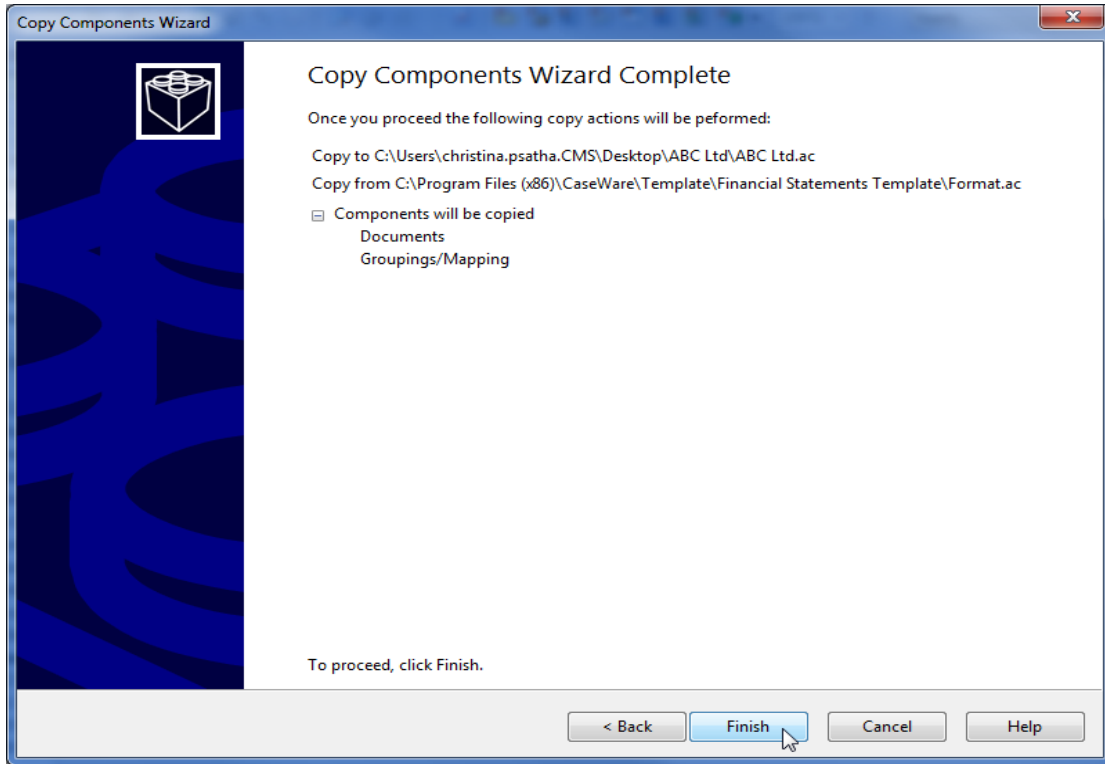


**i. Click Next to continue**

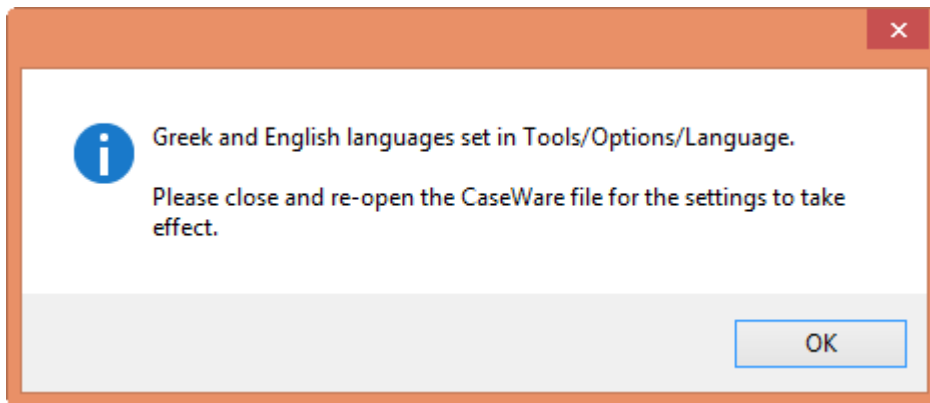




- j. Click Finish to complete the Copy Components wizard.



- k. When the process is complete the below window will appear click OK to continue.



**NOTE: Close and re-open the CaseWare file for the language settings to take effect.**

- l. On opening the file, the language selection will appear on the toolbar

