



SYSTEMS SOLUTIONS

# Procedure in downloading the OLD Tax Returns ONLY



caseware<sup>TM</sup>

VERSION 1.00

## **PROCEDURE SUMMARY**

1. Download the OLD Tax Returns file from the Client Support Area of our web site 3
2. Locate the zip file and: ..... 5
3. Enter CaseWare Working Papers. From File tab select Templates ..... 8

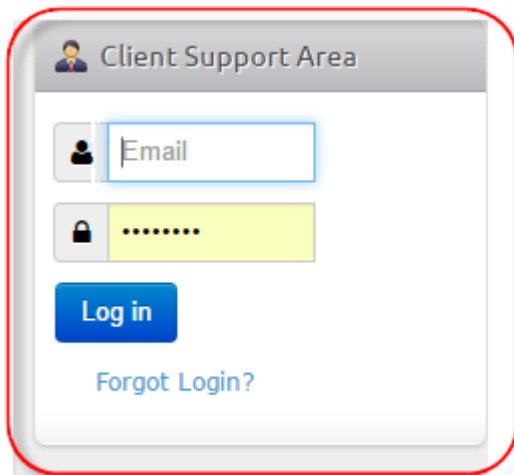
**1. Download the OLD Tax Returns file from the Client Support Area of our web site**

(Note: We recommend using [Mozilla Firefox](#) or [Google Chrome](#) for browsing our website)

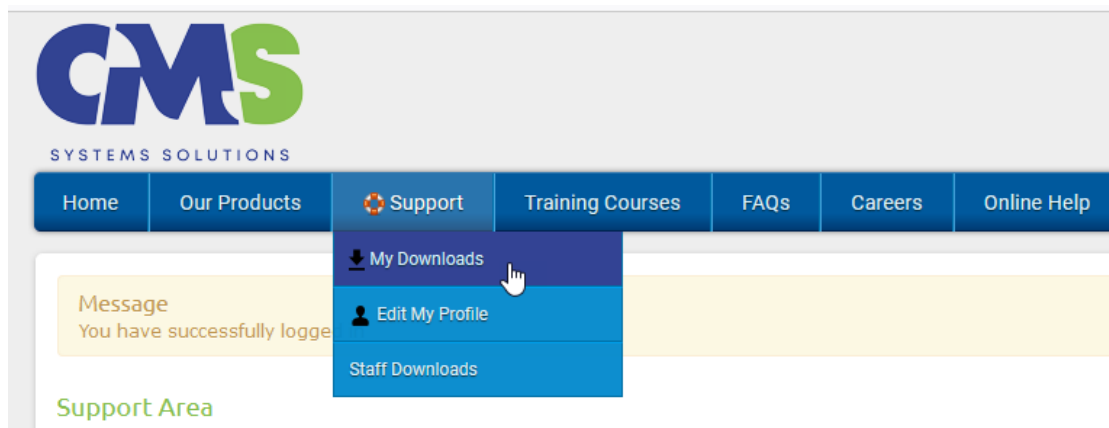
- a. You can access the Client Support Area at <http://cms-ss.com/>.



- b. Login using your Email and Password.



- c. Once logged in, click on the option “Support”, “My Downloads”.



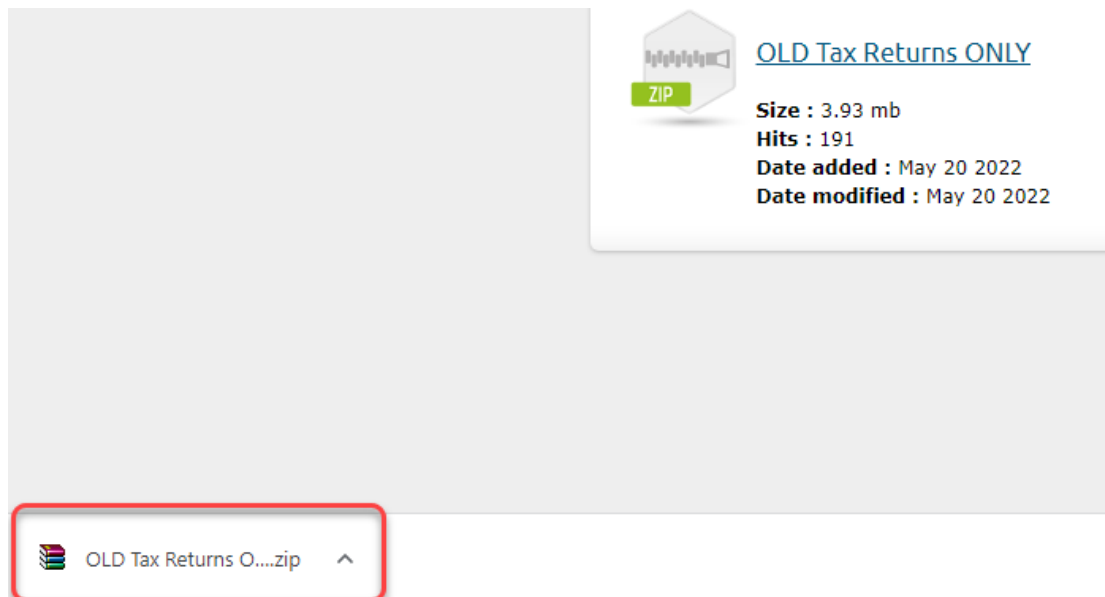
- d. From the list of Product, click on CaseWare Financial Statements.



- e. On the Financials Statements Downloads, click to download OLD Tax Returns ONLY.

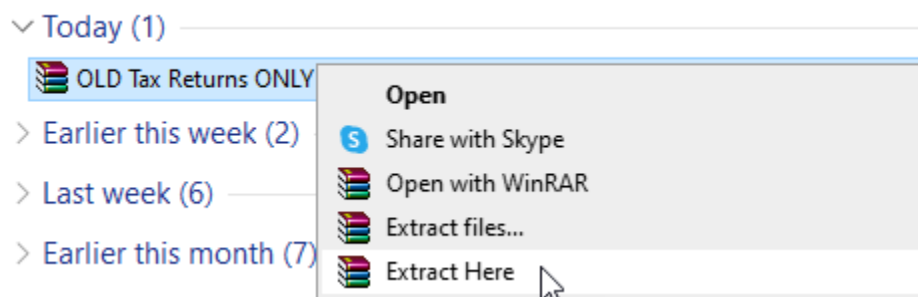


- f. At the bottom of the page, you will see the file downloading. In some cases, a window will pop up and select to **Save File**.

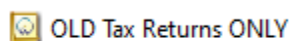


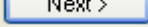
**2. Locate the zip file and:**

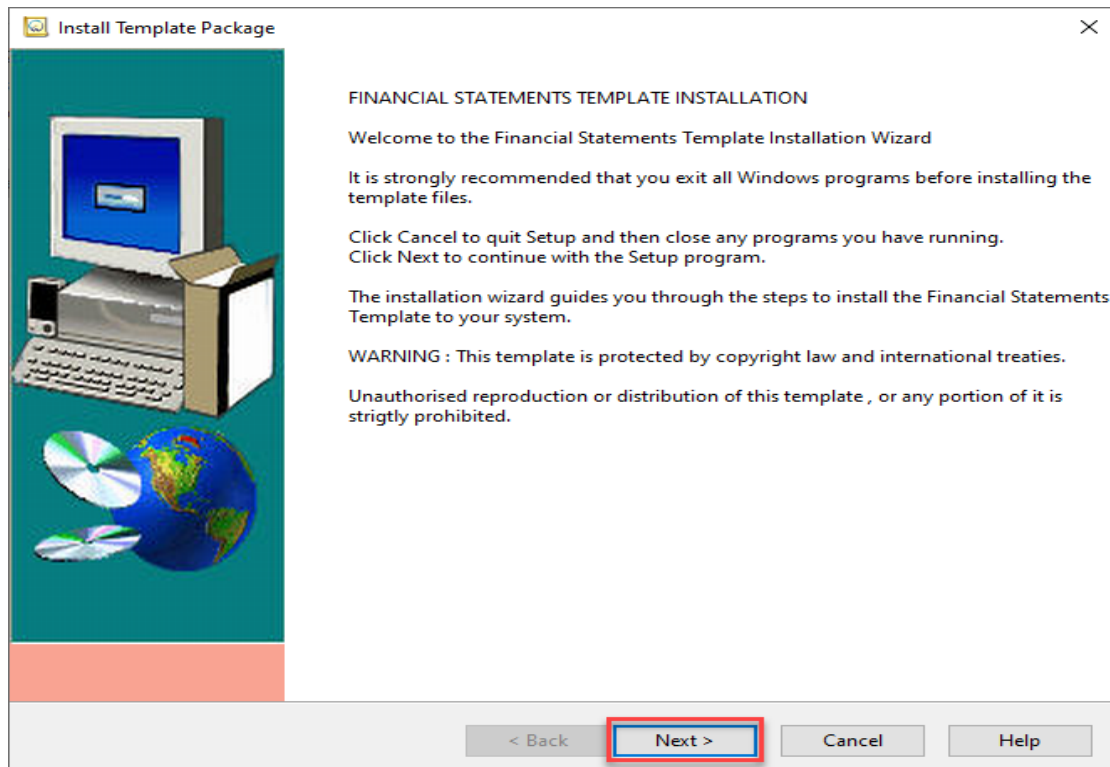
- a. Right click and choose Extract Here.



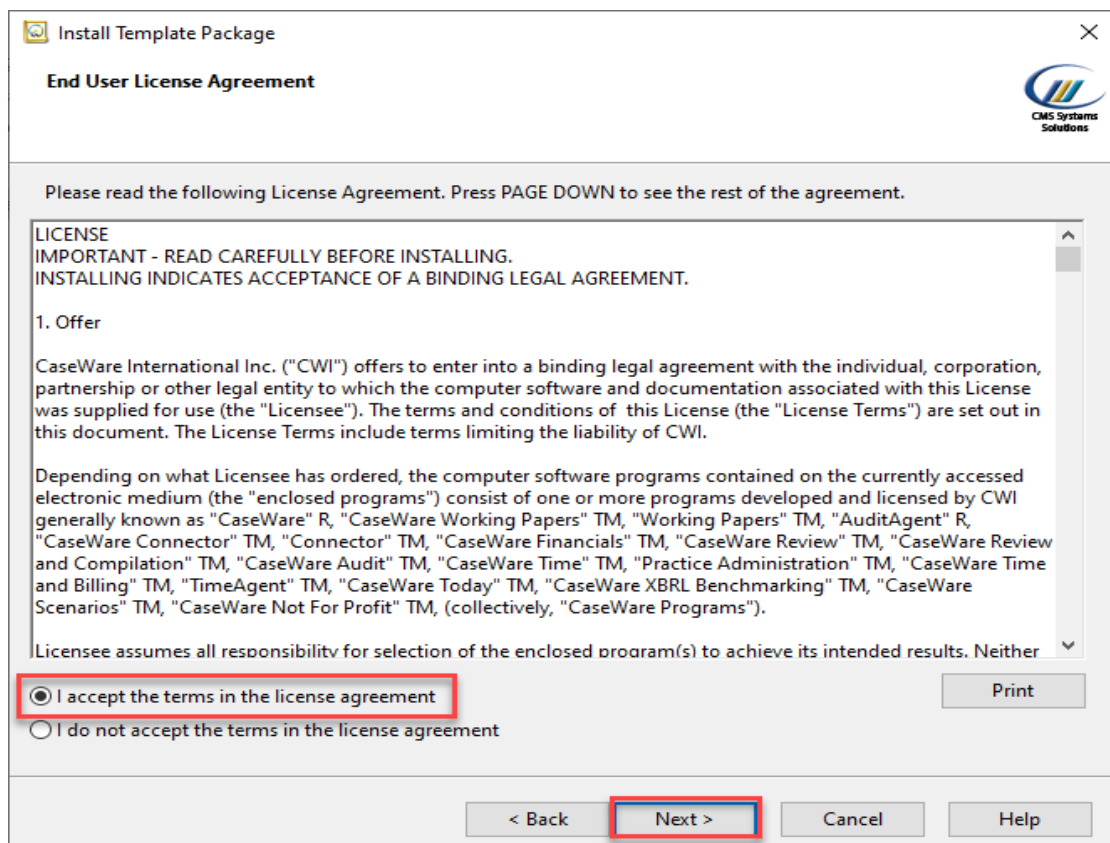
- b. The extracted file is a Caseware Package File as shown below.  
To install the template, double click on it.



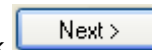
- c. In the Install Template Package window, click  to proceed with the installation.




- d. On the next screen select "I accept the terms in the license agreement", click Next.



e. Then enter the installation key “FORMAT” and click

The screenshot shows a software installation window titled "Install Template Package". In the top right corner, there is a close button (X) and the logo for "CMS Systems Solutions". Below the title bar, the section "Install Code" contains a message: "This template requires one or more installation keys to be specified before proceeding. Select an entry below and enter the corresponding installation key in the box that appears." Below this message is a table with four columns. The first column is labeled "Label" and the second is labeled "Installation Key". The first row of the table has "FORMAT" in both the first and second columns. A green checkmark is visible in the third column of this row. At the bottom of the window, there are four buttons: "< Back", "Next >", "Cancel", and "Help". The "Next >" button is highlighted with a red rectangular border.

- f. Leave the paths as it is, select Finish.



### Install Template Package

Setup will now begin the installation of the template.

The template will be installed in the folder below. Template components (such as libraries, scripts, and styles) will be installed to their corresponding subfolders in the Program Folder below.

To install to these folders, click Finish.

To install to different folders, click Browse and choose alternate folders.

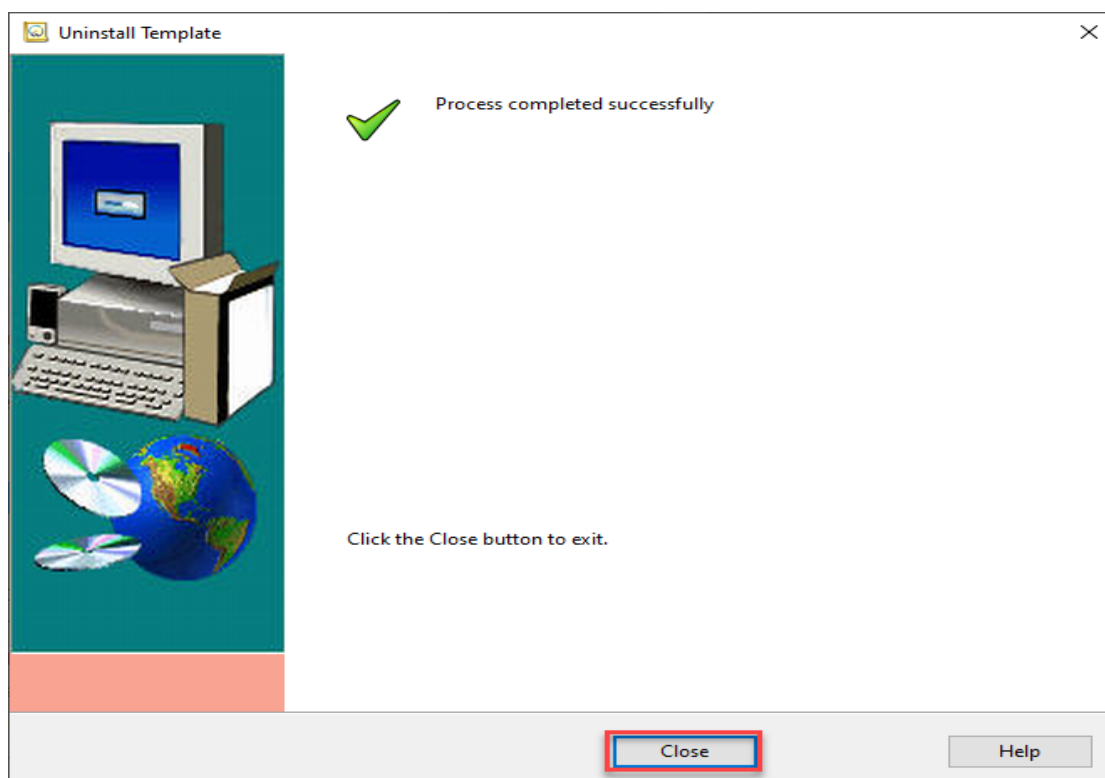
Program Folder:

Template Folder:

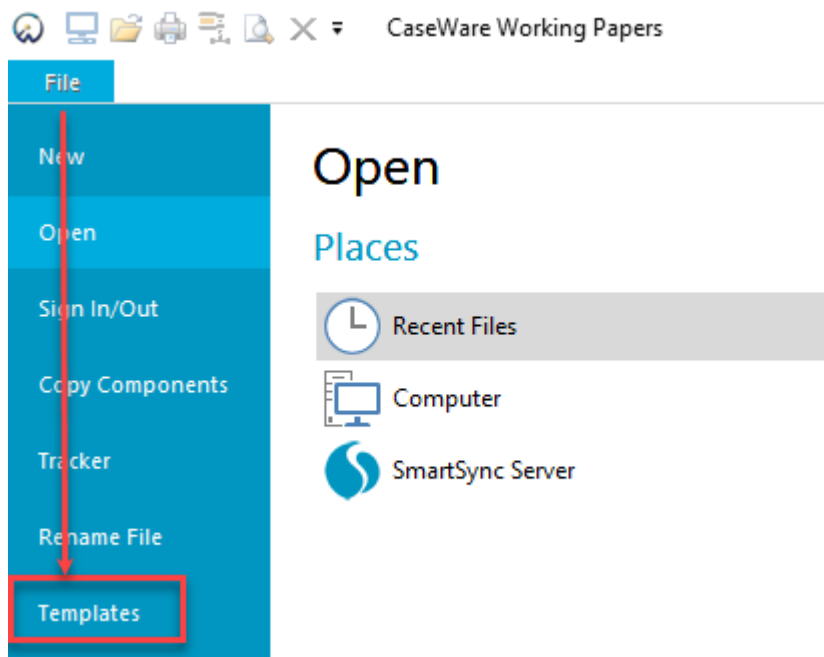
☐ Back up existing template

☒ Uninstall existing template

- g. Click the Close button to exit.

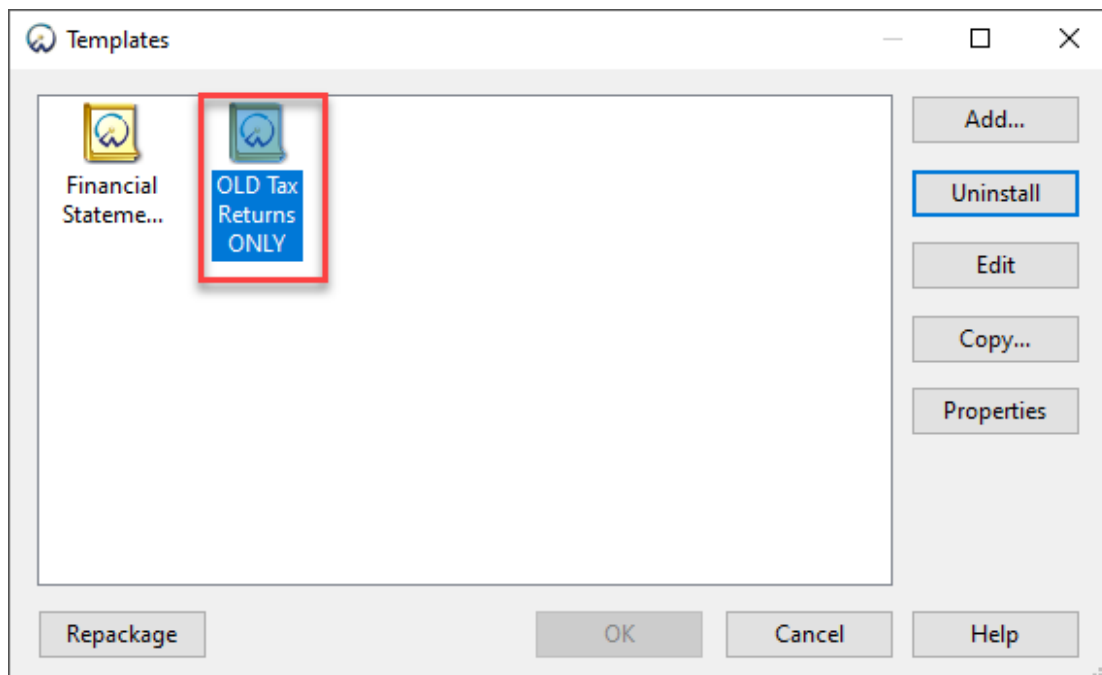


**3. Enter CaseWare Working Papers. From File tab select Templates**





- a. File will now show in Templates list.



The procedure in downloading the OLD Tax Returns is now completed.