

# SMSF Audit: Firm Settings & Best Practices

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**CASEWARE**  
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# Topics

- Firm Template
- Engagement Workflow
- Mapping Accounts
- Queries Document
- Miscellaneous

# Firm Template

Use to customise:

- Placeholders
  - Documents
  - Risk
  - Checklist Responses
  - Queries
  - Letterhead and Logos
- 

# Engagement Workflow

- Assigning work and roles
- Workflow stages
- My work filter

# Mapping Accounts

If importing a manual trial balance, accounts will need to be mapped to CaseWare SMSF Audit's default financial groups.

- Mapping suggestion
- Select multiple accounts
- Filter bar
- Carryforward

# Queries Document

## Query document vs Query Template

What is the difference?

## Queries summary

Summarize all query documents

## Sending document to Contacts

Attaching a document to your query

# Miscellaneous

Save to Cloud

Save as PDF

Lock down

Tabs

# Thank You!

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