

an Expert Template

Formerly CaseView Solutions

IS BETTER

Templates designed by a CaseView expert, instead of someone who has a little spare time and some computer skills, will invariably be more effective at accomplishing the desired goals: accuracy, efficiency and ease of use.

A well designed template should be easy to use, easy to update, and most importantly, easy to learn. This is all part of what **KEYSTONE TEMPLATES** can provide for you.

Call for a free demonstration of our solutions and see for yourself how much better they are than what you are using today.

We will provide a template tailored to the needs of your firm with options and a flexibility that cannot be matched in house.

KEYSTONE TEMPLATES INC.
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KEYSTONE TEMPLATES

Your **CaseWare**
solutions provider

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Your CaseWare

Template Provider

KEYSTONE TEMPLATES is dedicated to providing you with highly automated tools for the results you need in a format you want.

We have a combined experience of over 20 years working with and creating templates for CaseWare users.

WITH KEYSTONE TEMPLATES YOU CAN:

- Cut prep time in half
- Automate financial statement prep
- Maximize efficiency of firm time
- Expand your services to your clients
- Generate more revenue from existing clients

Other developers may tell you to accept their limitations or charge you to work around them, but at KEYSTONE TEMPLATES your preferences are a design imperative, not an inconvenience.



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FINANCIAL STATEMENT SOLUTION

- Over 1000 options plus complete control over fonts
- Easily updated to new standards - both firm specific and CICA requirements
- Incredible flexibility on a file by file basis
- Easy to add notes
- No need for you to ever enter the design mode
- Simple rounding functions
- Display from one to five columns of numbers
- Three partnership layouts, can handle from two to ninety-five partners
- Statements that are easily turned on or off
- Multiple ownership terminology choices
- Percentiles on the income statement
- Schedules or detail easily added to income statement

ENGAGEMENT MANAGER SOLUTION

- Knowledge of client's business
- Up to date checklists - PEM, PPM and firm procedures
- Create "Firm Standard" checklists, generates warnings if answers are not expected
- Use our modifiable letters or write your own in their place
- Real time completion status monitor
- Equipped to handle a paperless environment
- Continuity schedules for pre-pays, capital assets, GST/HST reasonability, income taxes, loans, etc...
- Linked to CaseWare via map numbers
- Warnings for out of date checklists
- Increase file preparation efficiency by adding intelligence to letters and checklists
- Simple top to bottom, left to right path to file completion

FINANCIALS UNLIMITED SOLUTION

- Can show budgeted, actual, variance, funds, entities, etc in multiple columns (up to 14)
- Customizable notes
- Balance sheet, income statement, statement of income, statement of retained earnings, statement of cash flows and every individual note can have the columns separately controlled to display your information
- Hundreds of presentation options to customize the financial statement presentation to match your firms needs
- Over two hundred predefined notes are included