



Training Course Outlines

Introduction to Jazzit Fundamentals

This course will guide you through the steps to bring Jazzit Fundamentals into your new and existing CaseWare files. We will cover importing trial balance data, bringing in Jazzit maps and key templates into your file. We also walk through the Home menu settings within the financial statements to ensure client defaults are set properly. This course is designed to get the new user up and running with Jazzit quickly.

- Introduction to Jazzit
- Overview of Jazzit documentation
- Setting up CaseWare defaults
- Understanding the Jazzit system
- Mapping/remapping
- Implementation strategies
- Invoice
- Engagement letter
- Benefits of using Jazzit
- Setting up CaseView defaults
- Importing data
- Sign in/out, check in/out
- Copy components options
- Financial statements - basics
- Property, plant and equipment schedule
- Management representation letter

Advanced Jazzit Fundamentals

This course is intended for people who are comfortable with Jazzit basics and are interested in the more advanced options and recent updates to the package. We look at the 9 column financial statements, Not-for-Profit statements, interim statements, copying a note from a different client financial statement, specified foreign property, loan/lease calculator, and much more.

- Review financial statement basics
- Prior period adjustments
- Using the 9 column financial statements format
- Statement notes
- Marketable securities working paper
- Account analysis working paper
- Combining accounts in the statements
- Creative ideas for notes and schedules
- Open discussion period
- Statement schedules
- Statement of cash flows
- Year-end checklist letter
- Client enclosure letter
- Callable and long-term debt
- Loan/lease calculator
- Exporting GIFI numbers
- Consolidations - advanced
- Recent changes

Jazzit Fundamentals Administrator

If you are responsible for keeping your firm's Jazzit Fundamentals up to date, or making changes to the Jazzit templates (including letterhead), this course is for you. We cover updating templates, tracking your revisions, and how to handle the most frequently requested customizations.

- Customizing headers and footers including firm letterhead
- Updating your KLIB from the Snackbar
- Creating custom letters and working papers
- Changing the name of notes (e.g., additional policies)
- Dealing with document ID conflicts with other CaseWare templates
- Proposed new templates
- Commonly requested statement customization
- Changing firm profile information
- Adding options to pop-up menus
- Style sheets for underlining and cell group options
- Modifying the generator for interim reporting
- Open discussion period



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 Website: www.jazzit.com/training

Jazzit Training Registration Form for May 2019

Firm Name:	Email:
Contact:	Phone:
Address:	Fax:
City, Province:	Postal Code:

<i>Number of Students</i>	<i>Course name</i>	<i>Date</i>	<i>Fee per Student</i>	<i>Session Total</i>
	Introduction to Jazzit	Wed., May 22	\$495.00	
	Advanced Jazzit	Thurs., May 23	\$495.00	
	Jazzit Administrator	Fri., May 24	\$495.00	
Sub-total				

Our GST Number 867964379

5% GST

Total

Payment Options (due with your registration):

- Cheque payable to AccountantsTemplates Inc. – Suite 140, 3115 12 Street NE, Calgary, AB T2E 7J2
 Visa MasterCard

Card number:	Expiry
Cardholder Name:	Cardholder Signature

Class Times: 9:00 AM – 4:00 PM – **Lunch is provided.**

Seminars: Introduction to Jazzit – **May 22** Advanced Jazzit – **May 23** Jazzit Administrator – **May 24**

Seminar fees: Each seminar is \$495+GST per student and is a full day of training. Please book at least 1 week in advance of the class you wish to attend. Cancellations must be received at least 2 weeks in advance of class date for refund. Cheques must be received at least 1 week in advance of course date to secure registration. Seating is limited.

Course location: Hampton Inn Calgary Airport North
 2021 100th Avenue NE
 Calgary, AB T3J 0R3
 Phone: (403) 452-9888

PD Points: This training may qualify as verifiable professional development. Each day provides six hours of instruction.

***Registration confirmation will be sent by email.**

If you have any questions regarding Jazzit Training you can email them to training@jazzit.com.

Please fax the completed form to us at 403-670-7590

For your payment security, if paying by credit card please fax registration form, DO NOT EMAIL

CALGARY