



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.

- ✓ Benefits of using Jazzit
- ✓ CaseWare and CaseView basics
 - Customize your desktop
 - Year end close and roll forward
 - Sign in/out and Check in/out
 - Important CaseView options
- ✓ Understanding the system
- ✓ Jazzit implementation strategies
- ✓ Copy components
- ✓ Import client data
- ✓ Mapping
- ✓ Review of 2 column statements
- ✓ Home menu options
- ✓ Key Working papers and letters
 - Global defaults
 - Common options

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.

- ✓ 9 Column financial statements
- ✓ Not-for-profit statements
- ✓ Notes to the financial Statements
- ✓ Get a note from another file
- ✓ Excel objects
- ✓ Statement schedules
- ✓ Consolidations - advanced
- ✓ Prior period adjustments
- ✓ Combining accounts in the statements
- ✓ Recent changes
- ✓ Foreign exchange
- ✓ Review various working papers and letters
 - Working paper diagnostics
 - Marketable securities working papers
 - Year end checklist letter
 - Account analysis
 - Client enclosure letter
 - Management letter
 - LTD group of working papers/loan calculator

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.

- ✓ Updating the Resource Centre (KLIB)
- ✓ Administrator settings
- ✓ Revising your firm profile
- ✓ CaseView design essentials
- ✓ Adding options to popup menus
- ✓ Customizing headers, footers, including firm letterhead
- ✓ Inserting new notes in categories
- ✓ Getting notes and schedules from other files
- ✓ Commonly requested customization
- ✓ Create custom letters and working papers
- ✓ Open discussion period
- ✓ Change the name of significant accounting policies



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Jazzit Training Registration Form

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	Tue., Jan. 14	\$495.00	
	Advanced Jazzit	Wed., Jan. 15	\$495.00	
	Jazzit Administrator	Thur., Jan. 16	\$495.00	
			Sub-total	
			GST @ 5%	
			Total	

Our GST Number 867964379

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 – **Jan. 14** Advanced Jazzit – **Jan. 15** Jazzit Administrator – **Jan. 16**

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: Sandman Signature Toronto Airport Hotel
 55 Reading Court
 Toronto, ON M9W 7K7
 Phone: (416) 798-8840

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

TORONTO