




# Jazzit Advanced Bundle Order Form

<b>Firm Name:</b> _____	<b>Contact:</b> _____
<b>Address:</b> _____	<b>Phone:</b> _____
<b>City:</b> _____ <b>Province:</b> _____	<b>Fax:</b> _____
<b>Postal Code:</b> _____	<b>Email:</b> _____
<b>Date:</b> _____	

	<input checked="" type="checkbox"/> First Licensed User	\$995.00	
	Add additional Jazzit users	\$495.00 each	
	Jazzit licenses must agree to the number of staff in your firm preparing or reviewing Caseware files which include any Jazzit templates. Licensing is only in the first year, annual support renewals are at a reduced cost.		
	<input checked="" type="checkbox"/> Help Desk (Help Desk includes Toll Free phone and email Support)	\$395.00	
(A download link is provided for all Jazzit orders and PDF documentation)			<b>Subtotal</b>

	<b>Please provide current CPA PEG Customer number: <u>C</u></b>		
	<b>Please provide current CPA PACT Customer number (if applicable): _____</b>		
	<input type="checkbox"/> PEG Checklist Bundle (Compilation, Review and Audit package)	\$695.00	
	<input type="checkbox"/> PEG Compilation and Review Checklists	\$515.00	
	<input type="checkbox"/> PEG Audit Checklists	\$515.00	
	<input type="checkbox"/> PACT Add-On	\$195.00	
Current subscription to CPA Canada D9; is required to subscribe to Checklists. (Checklists & PACT are non-refundable)			<b>Subtotal</b>

	<b>E-SIGNATURES</b>	<input checked="" type="checkbox"/> Personalized firm letterhead inserted into Jazzit	\$320.00	
		<input checked="" type="checkbox"/> Electronic signature on engagement report (firm name)	\$270.00	
		<input checked="" type="checkbox"/> Electronic signature on letters – first signature (partner names)	\$270.00	
		Add additional partner signatures(s)	\$160.00 each	
	<b>OPTIONAL ITEMS</b>	<input type="checkbox"/> On/off toggle switch for letterhead	\$109.00	
		<input type="checkbox"/> Password on draft stamp	\$160.00	
		<input type="checkbox"/> Multi-Office RD Module	\$162.00	
	(Personalization is a non-refundable option)			<b>Subtotal</b>

<b>ORDER TOTAL</b>	<b>SUBTOTAL</b>	\$
	<b>5% BUNDLE DISCOUNT</b>	\$
	<b>SUBTOTAL AFTER DISCOUNT</b>	\$
	(GST #867984379) <b>GST/HST</b>	\$
	<b>TOTAL</b>	\$

Please select from one of the payment options below.

<input type="checkbox"/> Cheque	<b>Payable to:</b> Accountants Templates Inc. <b>Mail to:</b> PO Box 70052, Creekside PO, Airdrie, AB T4B 0V9
<input type="checkbox"/> Secure Online Payment	<b>Please wait for an Invoice and payment link from <a href="mailto:orders@jazzit.com">orders@jazzit.com</a>.</b>



## BUNDLE REQUIREMENTS

Please complete the following steps to finalize your order:

### FIRM PROFILE:

1. To personalize your Jazzit templates to your firm's requirements, complete the Firm Profile on our website by clicking the link: <https://support.jazzit.com/clientprofile>

2. Once you have completed the firm profile, click the REVIEW button at the top right of the form to confirm the accuracy of your information. \*This information **AS ENTERED** is what we use to create your account.\*



3. If all information is accurate, click the SUBMIT button.

Please note that submitting the Firm Profile does **NOT** submit the order form. Please send in the order form separately first.



4. Once submitted, you will receive the following message:

If you do not receive this message, your Firm Profile HAS NOT been submitted.

Jazzit Fundamentals - Firm Profile Submission

Thank you!

Your Jazzit Fundamentals firm profile was successfully submitted.

Thank you for submitting your firm profile. You will receive a copy of the submitted information to the email you provided. We will be in touch shortly to proceed with the order process.

### ELECTRONIC FIRM LETTERHEAD:

Send the following via email to [orders@jazzit.com](mailto:orders@jazzit.com):

1. **2-page sample** of your firm letterhead in either MS Word, CaseView or PDF format
  - Ensure the letterhead is properly aligned and sharp.
  - If your letterhead includes any graphics (logos etc.) please include the graphic in either JPG or PNG format.
2. Sample of your **current financial statements**.
  - In PDF format

### ELECTRONIC SIGNATURES:

Send the following via email to [orders@jazzit.com](mailto:orders@jazzit.com):

1. Provide a custom password for your signature(s)
  - No minimum requirements, one password for each signature.
2. A copy of your firm name signature in either JPG, PNG or PDF format
  - Please ensure the image is sharp.
3. Provide the width of the signature when printed.
  - Measure the width of the signature and include in the email.