

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
- Capital asset schedule
- Client representation letter

Advanced Jazzit Fundamentals

This course is intended for people who have been preparing files using Jazzit for some time and want to see what's new with Fundamentals. 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
- New 9 column financial statements
- Statement notes
- Prepaid working paper
- GST working papers
- Combining accounts in the statements
- Creative ideas for notes and schedules
- Open discussion period
- Statement schedules
- Statement of cash flows
- Materiality guidelines working paper
- Callable and long term debt
- New Loan/Lease calculator
- Exporting GIF1 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.

- See more at: <http://www.jazzit.com/whats-new?view=entry&id=79#sthash.byOlmjK0.dpuf>

- Customizing headers and footers including firm letterhead
- Updating your KLIB from the Snack bar
- Adding foreign exchange to the generator
- Changing the name of note modules (e.g., additional policy 1)
- Dealing with document ID conflicts with other CaseWare templates (e.g. CPA / CGA programs and checklists)
- 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

Jazzit Training Registration Form for January 2015

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

Number of Students	Course name	Date	Fee per Student	Session Total
	Introduction to Jazzit	Tues, January 20	495.00	
	Advanced Jazzit	Wedn, January 21	495.00	
	Jazzit Administrator	Thurs, January 22	495.00	
			Sub-total	
			5% GST	
			Total	

Our GST Number 867964379

Payment Options (due with your registration):

- Cheque payable to AccountantsTemplates Inc. - please mail to the above address
- Visa MasterCard

Cardholder Name: _____ Card No: _____ Expiry Date: _____

Authorized Cardholder Signature: _____

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

Seminars: Introduction to Jazzit – **Jan 20** Advanced Jazzit – **Jan 21** Jazzit Administrator – **Jan 22**

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: **Coast Plaza Hotel**
 1316 33rd Street NE
 Calgary, AB T2A 6B6
 Phone: (403) 248-8888 Toll-free: 1 (800) 716-6199

PD Points: This training may qualify for professional development points. Check with your Association for further information.

***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

