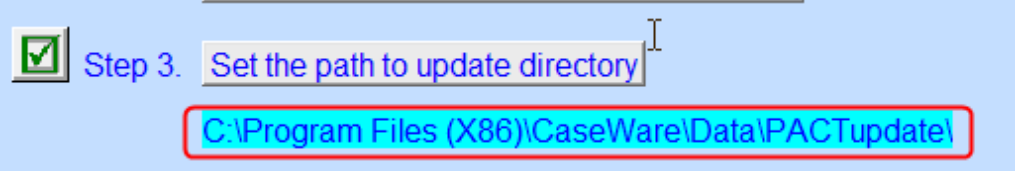
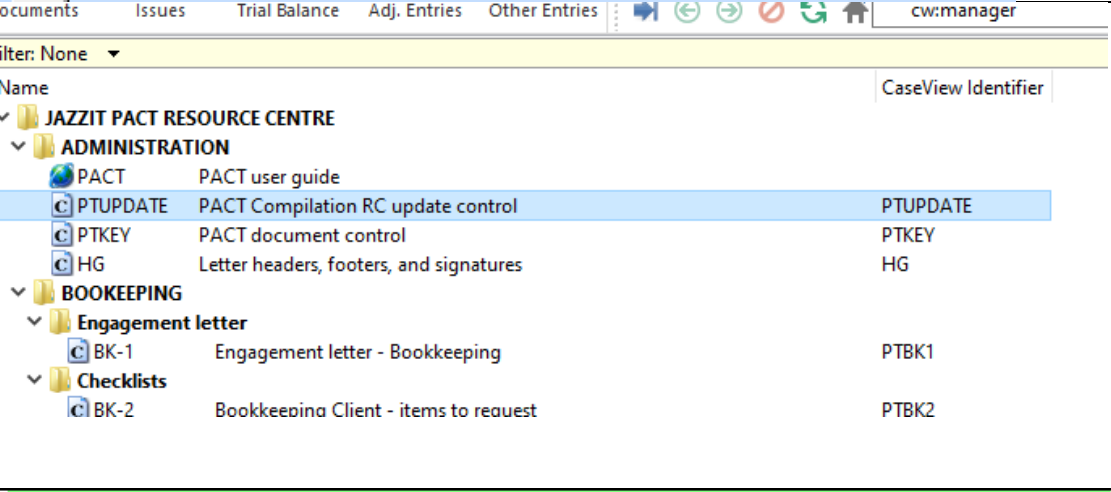
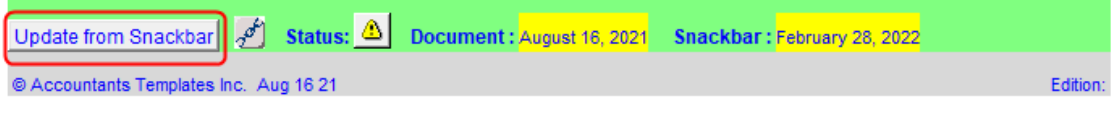


































Updating Jazzit PACT

Steps to update PACT Resource Centre	
1. Download the update from our website:	https://jazzitsupport.com/Downloads/GetPact?file=Update
2. Once you download the PACTUPDATE.exe file please run the install and note the file location you unpack the files to.	<p>The default location is:</p> 
3. Open PTUPDATE from your PACT Resource Centre and unlock form mode with administrator password	
4. Click on Update from Snackbar button to update the document	

Updating Jazzit PACT

<p>5. Open the regular method folder:</p>	<p>© Accountants Templates Inc. Feb 28 22 Edition © 2021 CPA Canada PACT</p> <p>PACT UPDATE CONTROL Last downloaded from website on:</p> <p>UPDATE METHODS </p> <p>Quick Method <i>(Replace PACT Resource Centre and Masters)</i></p> <div style="border: 1px solid blue; padding: 5px; margin: 5px 0;"> <p>If you have not customized the PACT we recommend you backup the current installation and reinstall the check list Resource Centre and Master to update. If you have customized letters (including the additional letters) or added content to the generic checklists please use the regular method to update.</p> </div> <div style="border: 2px solid red; padding: 5px; margin: 5px 0;"> <p> Regular Method <i>(Recommended if you are using firm letterhead)</i></p> </div>																								
<p>6. Complete the 5 steps. As you complete each step the attention symbol will switch to a checkmark once the step has been completed.</p>	<p>Please unlock this document before proceeding. Click the Lock/Unlock button on the Home tab and enter the Jazzit administrator's password when prompted.</p> <p><input checked="" type="checkbox"/> Step 1. Set the path to uncompressed PACT Compilation Master C:\Program Files (x86)\Caseware\Data\PACT Compilation Master</p> <p> Step 2. Download from website to update directory</p> <p><input checked="" type="checkbox"/> Step 3. Set the path to update directory C:\Program Files (X86)\CaseWare\Data\PACTupdate\</p> <p><input checked="" type="checkbox"/> Step 4. Refresh dates in the snackbar version column on the right. You may wish to print this document before step 5 to have a record of the changes made.</p> <p> Step 5. Update all modules without customization dates or click on the  button(s) in the status column below to update individual templates.</p> <p>Log: View revision summary</p>																								
<p>7. If new documents have been added to your PACT Resource Centre / Master file they will now appear at the top of your document manager. You can now drag these documents to the desired location:</p>	<table border="1"> <thead> <tr> <th>Name</th> <th>CaseView Identifier</th> </tr> </thead> <tbody> <tr><td> PTST7 Registered Charity Information Return (T3010 Checklist)</td><td>PTST7</td></tr> <tr><td> PTST6 Partnership Financial Return (T5013) Checklist</td><td>PTST6</td></tr> <tr><td> PTST5 Client Acceptance Checklist</td><td>PTST5</td></tr> <tr><td> PTST4 Capital Dividend Election Checklist</td><td>PTST4</td></tr> <tr><td> PTT1ORG Personal tax organizer</td><td>PTT1ORG</td></tr> <tr><td colspan="2">JAZZIT PACT RESOURCE CENTRE</td></tr> <tr><td colspan="2">ADMINISTRATION</td></tr> <tr><td> PACT PACT user guide</td><td></td></tr> <tr><td> PTUPDATE PACT Compilation RC update control</td><td>PTUPDATE</td></tr> <tr><td> PTKEY PACT document control</td><td>PTKEY</td></tr> <tr><td> HG Letter headers, footers, and signatures</td><td>HG</td></tr> </tbody> </table>	Name	CaseView Identifier	 PTST7 Registered Charity Information Return (T3010 Checklist)	PTST7	 PTST6 Partnership Financial Return (T5013) Checklist	PTST6	 PTST5 Client Acceptance Checklist	PTST5	 PTST4 Capital Dividend Election Checklist	PTST4	 PTT1ORG Personal tax organizer	PTT1ORG	JAZZIT PACT RESOURCE CENTRE		ADMINISTRATION		 PACT PACT user guide		 PTUPDATE PACT Compilation RC update control	PTUPDATE	 PTKEY PACT document control	PTKEY	 HG Letter headers, footers, and signatures	HG
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 HG Letter headers, footers, and signatures	HG																								

Updating Jazzit PACT

<p>8. Here is where we have added these documents to the PACT KLIB document manager:</p>	
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Steps to update PACT Master	
<p>1. Open your PTKEY document from your PACT Master document manager:</p>	
<p>2. Update your PTKEY by clicking on the "Update from Resource Centre" button at top left of the document.</p>	
<p>3. Just below the staff names area set the view filter to show only documents with updates available:</p>	

Updating Jazzit PACT

<p>4. Click on the attention button to open the document to be updated:</p>	<table border="1"> <thead> <tr> <th>Program & checklist</th> <th>Status</th> <th>ID</th> <th>Diagnostic</th> <th>Client file version</th> <th>Resource Centre version</th> </tr> </thead> <tbody> <tr> <td>TSEL1 Corporate tax engagement letter</td> <td></td> <td>PTTSEL1</td> <td>Update available for document</td> <td>August 16, 2021</td> <td>February 28, 2022</td> </tr> <tr> <td>TSEL2 General tax compliance services engagement letter</td> <td></td> <td>PTTSEL2</td> <td>Update available for document</td> <td>August 16, 2021</td> <td>February 28, 2022</td> </tr> </tbody> </table>	Program & checklist	Status	ID	Diagnostic	Client file version	Resource Centre version	TSEL1 Corporate tax engagement letter		PTTSEL1	Update available for document	August 16, 2021	February 28, 2022	TSEL2 General tax compliance services engagement letter		PTTSEL2	Update available for document	August 16, 2021	February 28, 2022
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<p>5. Click on the “Update from Resource Centre” button to update the document. Answer Yes to update and No to keep input date (and yes to keep input date if updating a document in client file if prompted):</p>	<p>Open document Sort paragraph groups: Sign off Adjusting entries Trial Balance Save & Exit</p> <p>© Accountants Templates Inc. 08.16.21 Licensed to: Jazzit by CPA Canada User: A PTTSEL1 Connected</p> <p>Update from Resource Centre Status: Document: August 16, 2021 Resource Centre: February 28, 2022</p> <p>Formatting options Engagement options Document settings</p> <p>March 4, 2022 Today's date </p>																		
<p>6. Save and exit the document:</p>	<p>Open document Sort paragraph groups: Sign off Adjusting entries Trial Balance Save & Exit</p> <p>© Accountants Templates Inc. 08.16.21 Licensed to: Jazzit by CPA Canada User: A PTTSEL1 Connected</p> <p>Update from Resource Centre Status: Document: August 16, 2021 Resource Centre: February 28, 2022</p> <p>Formatting options Engagement options Document settings</p> <p>March 4, 2022 Today's date </p>																		

Updating Jazzit PACT

7. Repeat steps 4 to 6 for the remaining documents to be updated:

Program & checklist	Status	ID	Diagnostic	Client file version	Resource Centre version
TSEL2 General tax compliance services engagement letter		PTTSEL2	Update available for document	August 16, 2021	February 28, 2022
TSEL3 General tax consulting services engagement letter		PTTSEL3	Update available for document	August 16, 2021	February 28, 2022
TSEL4 Partnership tax services engagement letter		PTTSEL4	Update available for document	August 16, 2021	February 28, 2022
TSEL5 Personal tax engagement letter		PTTSEL5	Update available for document	August 16, 2021	February 28, 2022
TSEL6 Trust tax services engagement letter		PTTSEL6	Update available for document	August 16, 2021	February 28, 2022
TSTL1 Standard transmittal letter (T1 EFILE)		PTTSTL1	Update available for document	August 16, 2021	February 28, 2022
TSTL2 Standard transmittal letter (T1 PAPER FILE)		PTTSTL2	Update available for document	August 16, 2021	February 28, 2022
TSTL3 Standard transmittal letter (T2 EFILE)		PTTSTL3	Update available for document	August 16, 2021	February 28, 2022
PTST1 T1- Personal tax checklist		PTST1	Update available for document	August 16, 2021	February 28, 2022
PTST2 T2 - Corporate tax checklist		PTST2	Update available for document	August 16, 2021	February 3, 2022
PTST3 T3 - Trust tax checklist		PTST3	Update available for document	August 16, 2021	February 3, 2022