




Jazzit Essentials Bundle Order Form

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

	<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)			Subtotal

	Please provide current CPA PACT Customer number: C		
	<input checked="" type="checkbox"/> PACT	\$425.00	_____
	Current subscription to CPA Canada PACT is required to subscribe to PACT. (PACT is non-refundable)		

	LH E-SIGNATURES	<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	_____
		(Personalization is a non-refundable option)		

ORDER TOTAL	SUBTOTAL	\$	_____
	\$150 BUNDLE DISCOUNT	\$	_____
	SUBTOTAL AFTER DISCOUNT	\$	_____
	GST/HST	\$	_____
	TOTAL	\$	_____

(GST #867984379)

Please select from one of the payment options below.

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

For security reasons we ask that you do not email payment information to us.



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:

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:

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.