



This document will explain:

How to add Branches to your Jim2 database

How to add Logos to differentiate Branches on Invoices, Quotes and Purchase Orders

• Activate **Branches**. Go to Tools > Options > Branches.

😑 Options			×
Company	General - Branches		
Security General Branches Labour Job Invoice StockGrid Customer Returns Project	Default Branch Required O I don't use Branches O Logged User O Customer/Vendor (From) Account Manager Company Logo for Sales based on O Default Default	Default SubBranch Required O I don't use SubBranch O Logged User O Customer/Vendor (From) O Account Manager Company Logo for Purchases based on O Default O Branch	Default GL Department Required
Managed Services			Debtors Branch Debtors SubBranch
Quote Purchase CardFile Item Stock Stock Pricing Serial/Attributes Warehouse Management Accounts Linked Accounts Multicurrency Banking Schedule eBusiness Documents Other Printers Email	Default Branches in Lists Use Customer Branch for default This Workstation is in Branch Location V	Allow invoicing Jobs from multiple SubBranch/GL Stock location	Department
Retail & EFTPOS	- Station level Global level		OK Cancel

- Select the **Default Branch option**. Defaults can be manually amended in the different areas of Jim2. For example, in the screenshot above, the logged user's Default Branch will automatically drop into relevant transactions (defaults can be manually amended in transactions).
- Select OK. Other selections in relation to Branches will be addressed in further steps below.







• Add a CardFile for each individual Branch.

Adding Ca	ardFile -				₫ ×
CardFile Card Code	QLD.BRANCH A.B.N.	Contact	Steve Crocker	¥	Active
Name	Happen Queensland Branch				Verder
Address	65 Shore Road	Delivery Address	65 Shore Road	<u> </u>	
		- >>			Personal
Suburb	BRISBANE ADELAIDE STREET	✓ Suburb	BRISBANE	-	Ship
State	QLD V PostCode 4000	State	QLD V PostCode 4000		
Country	Australia	✓ Country	Australia	¥	
Acc. Mgr	~	Groups			
Branch	✓ Sul	Branch	✓ GL Dept		

- Flag this CardFile as a Customer.
- Save the CardFile. Please note, the delivery address on the CardFile is important.
- Set up **Branch**. Go to Tools > Setups > Branches, click Add. Enter unique Code. Enter Name of Branch. Select CardCode as per setup in previous step. Select Active. Click save.

Setup - Branch (E	diti	ng QLD)			ð× 🗗
Accounting		Code	Name	Card Code	Active
Budgets		BRIS	Brisbane Store	EXAMPL.BRI	\checkmark
Branches		BSTN	Bankstown Factory Outlet	EXAMPL.BTN	\checkmark
SubBranch		QLD	Queensland	QLD.BRANCH	\checkmark
···· Stock GL Groups		SYD	Sydney Store	EXAMPL.SYD	~
Banking Payment Type Tills CardFiles CardFiles Payment Terms Price Levels Jobs Job Priority	•	Code: Name: Card Code:	QLD Queensland QLD.BRANCH ····		
		<u>S</u> ave	Cancel Delete View	(Close

- Set up **stock locations** and link to Branch if applicable. Go to Tools > Setups > Stock > Stock Locations.
- Select Add and enter unique stock location Code, Description, and select the default Branch. Tick Active. Tick Default for branch.

Setup - Stock Loc	ati	ons (Edit	ting 2)							₫ ×
Projects Project Types	*	Location	Descriptio	n	Branch	Branch Default	Bulk Location	Exclude from Procurement	Warehouse Management	Active
···· Finance Templates		BULK	Bulk War	ehouse	SYD		~		~	\checkmark
Stock Yield Types		NSW	NSW Offi	ce	SYD					~
Stock Locations		QLD	Queensla	nd Office	QLD	\checkmark				~
- Stock Attributes		TXFR	Stock in t	ransit						~
Stock Bins		VIC	Victoria C	ffice						~
mail Email Accounts	1									
Email Folders		Code:		QLD		Active 🗸	В	ulk Location	Wareh	ouse l
ther Note Types		Description: Queensland C		Office		E	xclude from Proc	urement		
()	Ŧ	Branch	:	QLD 🗸	Queensland		V D	efault for branch	ı	
		Save		Cancel	<u>D</u> elete	View			Close	







- Logos. If you choose to use a separate Logo for the various Branches, go to Tools > Report Designer > Logo.
- Select the Company Logo in the contents area.
- Select 'Copy from Existing' report and give a new name as per card code in example Company_Qld.Branch (Qld.Branch being the cardcode). Add the new logo.









• Set final setting for Branches as required. Tools > Options > Branches.

🔁 Options			×
Company	General - Branches		
Security General Branches Labour Job Invoice	Default Branch Required O I don't use Branches Customer/Vendor (From) Account Manager	Default SubBranch Required O I don't use SubBranch O Logged User O Customer/Vendor (From) Account Manager	Default GL Department Required I don't use GL Departments Logged User Customer/Vendor (From) Account Manager Use in Cheque & General Journal only
Customer Returns Project Machines Managed Services	Company Logo for Sales based on Default Branch SubBranch	Company Logo for Purchases based on © Default O Branch O SubBranch	Company Logo for Statements based on Default Debtors Branch Debtors SubBranch
Quote Purchase CardFile Item Stock Stock Pricing Serial/Attributes Warehouse Management	Default Branches in Lists	Allow invoicing Jobs from multiple SubBranch/GL tock location	Department
Accounts Linked Accounts Multicurrency Banking Schedule eBusiness Documents Other Printers Email			
Retail & EFTPOS	- Station level 🖉 - Global level		OK Cancel

• Default Branch

Required – select this option if **all** transactions will require a Branch selection (Jim2 will not let the user invoice a job, or Finish a PO, without entering the Branch).

Logged User – Jim2 will select the default Branch from the logged user's CardFile.

Customer/Vendor (From) – Jim2 will select the default Branch from the Customer/Vendor (From) CardFile in transaction.

Account Manager – Jim2 will select the default Branch from the Account Manager's CardFile (Account Manager selected against the customer/vendor CardFile).

- Default Branches in Lists helps users see their branch transactions in Lists.
- Use Customer Branch for default Stock location ignores the user's default stock location in a Job.
- **This Workstation is in (Branch and Location)** assists where a specific workstation is in a branch, and a user from another branch logs into Jim2 on that workstation.







- Open user's CardFile and select default Branch for that user.
- Click Save.

Editing CardFile - FL 🗗 🕹 🔂						
- CardFile						
Card Code	FL A.B.N.	Contact Frank Lampa	ď	✓ Active		
Name	Frank Lampard			Customer 🗸		
Address	16 Hammond Drive	elivery				
		laaress				
	Y	>>	Y	Personal		
Suburb	ALFORDS POINT V	Suburb	~	Ship		
State	NSW V PostCode 2234	State 🗸 🗸	PostCode			
Country	Australia 🗸 🗸	Country	~			
Acc. Mgr	×	Groups No groups as	signed			
Branch	QLD V Queensland SubBrand	~	GL Dept			
- Customer -	BSTN Bankstown Factory Outlet					
Terms	BRIS Brisbane Store	Send Statemer	t via Print V	Required Days		
	QLD Queensland	bend buddenier		Required Days		
Price level	SYD Sydney Store	0.00 Send Invoid	e via 🛛 Print 🔍	Hours		
Cust PO #	Acc. Fee %	0.00 Ship Via / S	hip \$	♥ 0.00		
Currency	AUD 🗸 🖌 Tax BPAY Ref# 000	67 Batch Inv. Grou	ip by Customer	¥		
Credit Hold	OFF (Auto) V					

For further assistance or information please call Happen Business 02 9570 4696 or email support@happen.biz

