

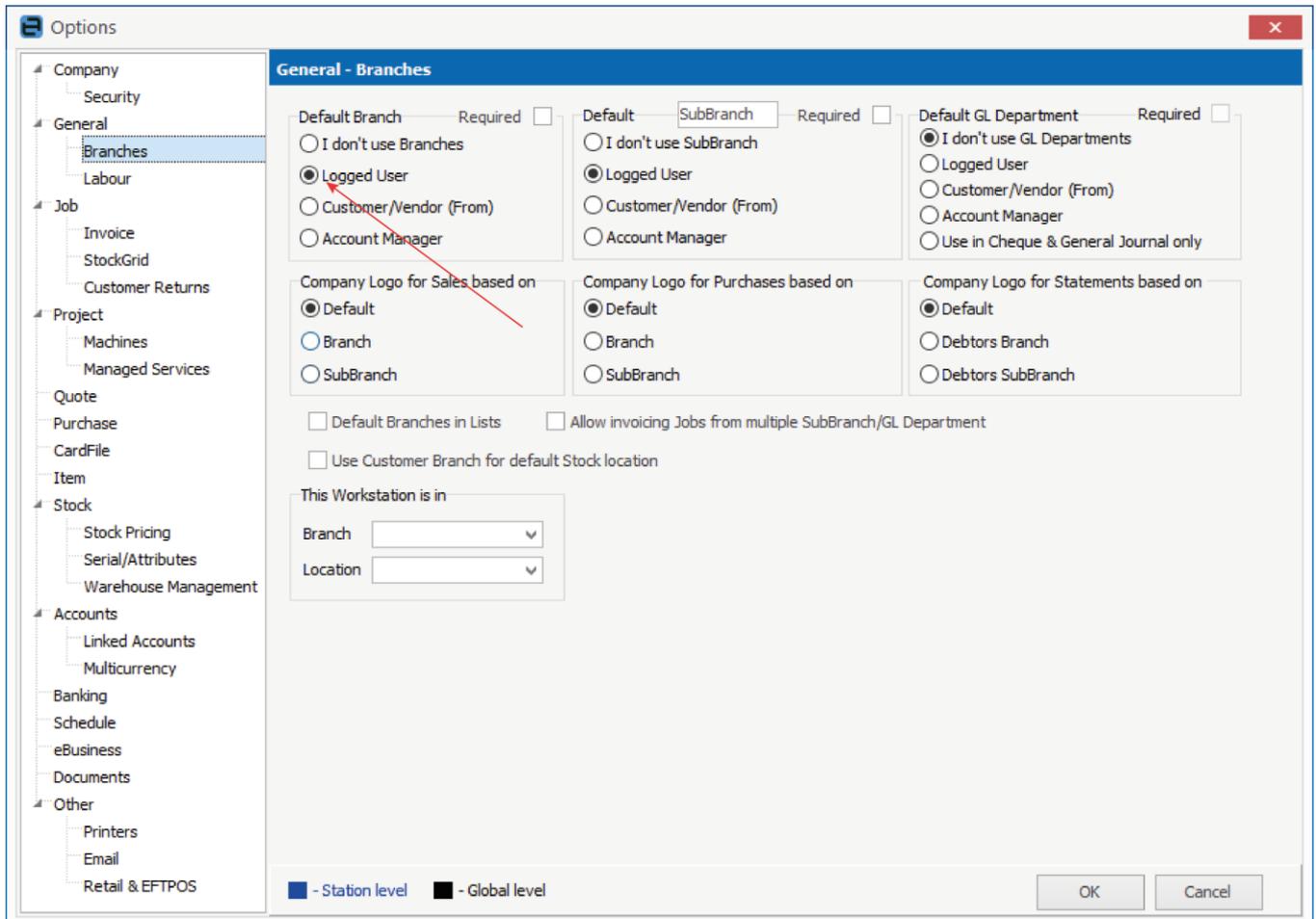
Branches – Setup

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.



- 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.

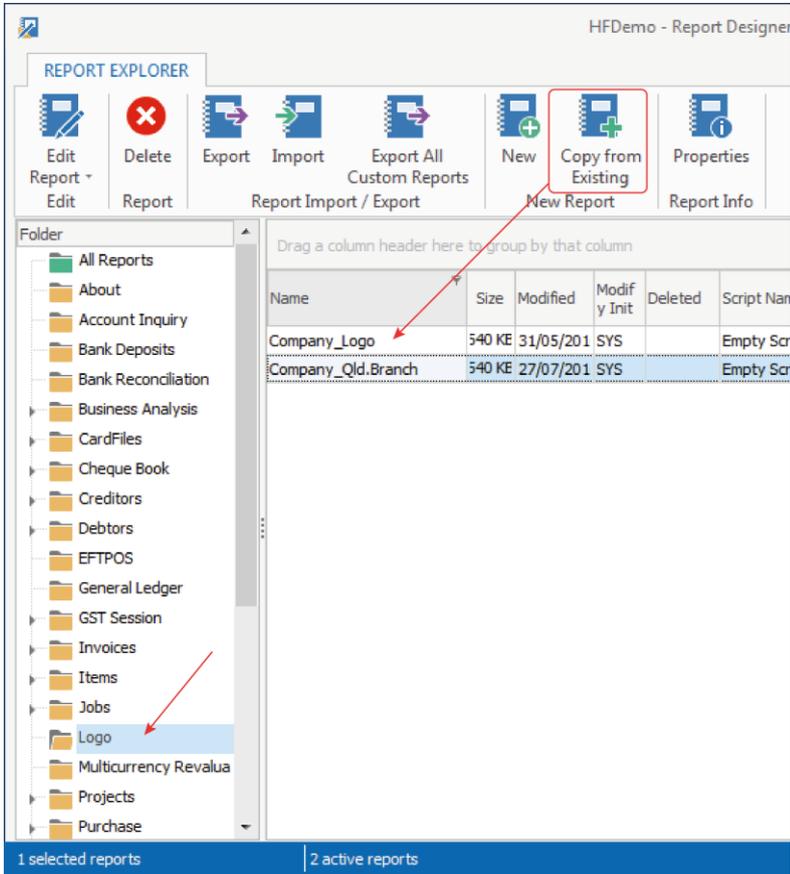
- Flag this CardFile as a Customer.
- Save the CardFile. Please note, the delivery address on the CardFile is important.
- Set up **Branch**. Go to Tools > Setups > Branches, click Add. Enter unique Code. Enter Name of Branch. Select CardCode as per setup in previous step. Select Active. Click save.

Code	Name	Card Code	Active
BRIS	Brisbane Store	EXAMPL.BRI	<input checked="" type="checkbox"/>
BSTN	Banksstown Factory Outlet	EXAMPL.BTN	<input checked="" type="checkbox"/>
QLD	Queensland	QLD.BRANCH	<input checked="" type="checkbox"/>
SYD	Sydney Store	EXAMPL.SYD	<input checked="" type="checkbox"/>

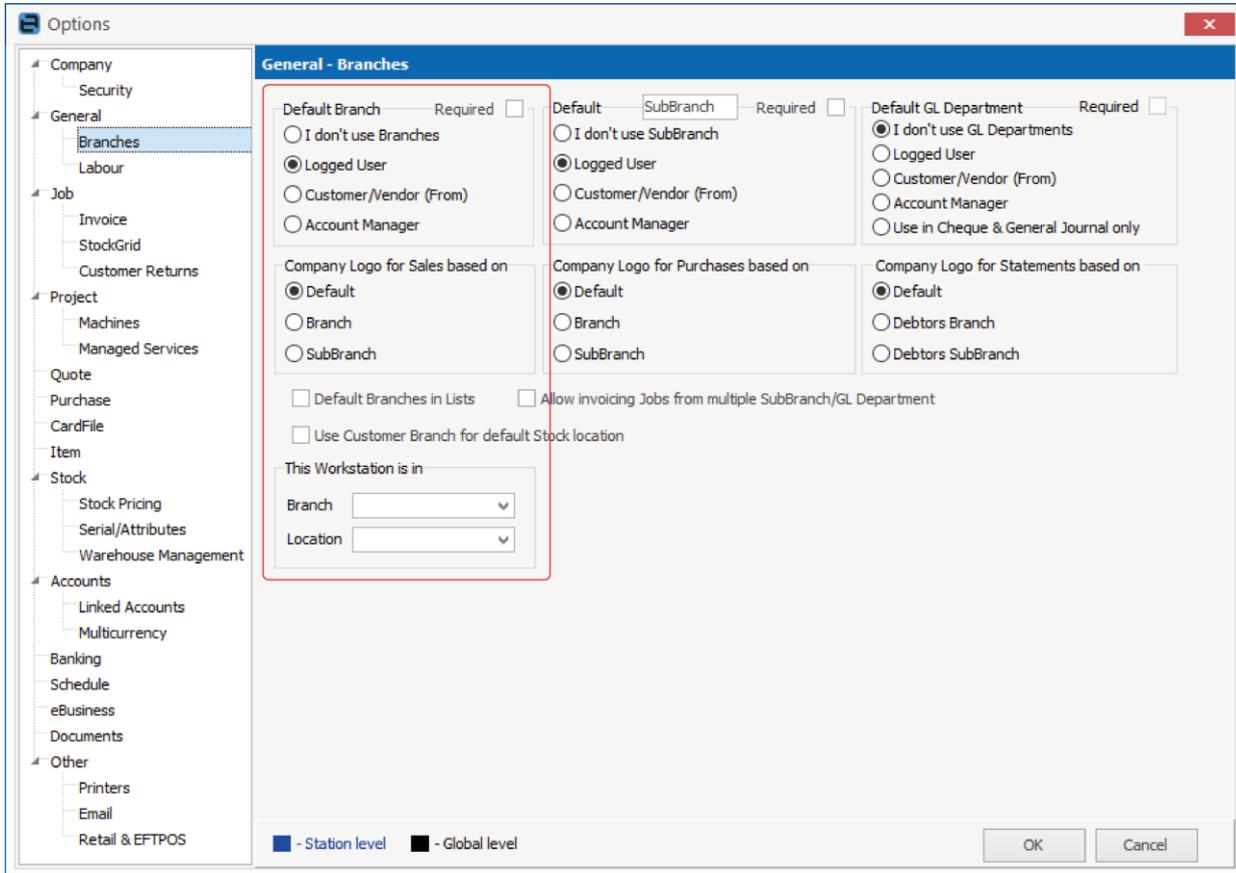
- Set up **stock locations** and link to Branch if applicable. Go to Tools > Setups > Stock > Stock Locations.
- Select Add and enter unique stock location Code, Description, and select the default Branch. Tick Active. Tick Default for branch.

Location	Description	Branch	Branch Default	Bulk Location	Exclude from Procurement	Warehouse Management	Active
BULK	Bulk Warehouse	SYD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NSW	NSW Office	SYD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
QLD	Queensland Office	QLD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
TXFR	Stock in transit		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
VIC	Victoria Office		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- **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.



- **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 Lampard

Name Frank Lampard

Address 16 Hammond Drive Delivery Address

Suburb ALFORDS POINT Suburb

State NSW PostCode 2234 State PostCode

Country Australia Country

Acc. Mgr Groups No groups assigned

Branch QLD Queensland SubBranch GL Dept

Customer BSTN Bankstown Factory Outlet

Terms BRIS Brisbane Store

Price level QLD Queensland 0.00

SYD Sydney Store

Cust PO # Acc. Fee % 0.00

Currency AUD Tax BPAY Ref# 0000067 Batch Inv. Group by Customer

Credit Hold OFF (Auto)

Send Statement via Print Required Days

Send Invoice via Print Hours

Ship Via / Ship \$ 0.00

Active

Customer

Vendor

User

Personal

Ship

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