Happen Business Pty Limited
Head Office: 7 Eden Park Drive
Macquarie Park NSW 2113
Branch & Mailing Address: 2/29 - 33 Pitt Street
Mortdale NSW 2223 Australia
p.   +61 1300 005 462 or +61 2 9570 4696
w.   www.jim2.com.au

Dashboard
Jim2® Business Engine

Fact Sheet

A standard feature of Jim2 Business Engine is the Performance Dashboard, which can be used for management purposes to monitor the health of your business. The Dashboard will help you to prepare for management meetings, help manage your operations, assist in the workshop and in sales teams, and many other purposes.

The Jim2 Business Dashboard is able to display:

- **Account Watch** – You can display in graphical format any account balance from your GL (eg. Sales, Assets, Expenses).
- **Debtors/Creditors** – You can see your Debtors and Creditors balances (30 days, 60 days, 90 days).
- **Status** – Quickly and easily see where all your jobs are up to (eg. Booked, Waiting for Parts, Finished, etc).
- **Job** – Quickly view both active jobs, or view job statistics over a period.
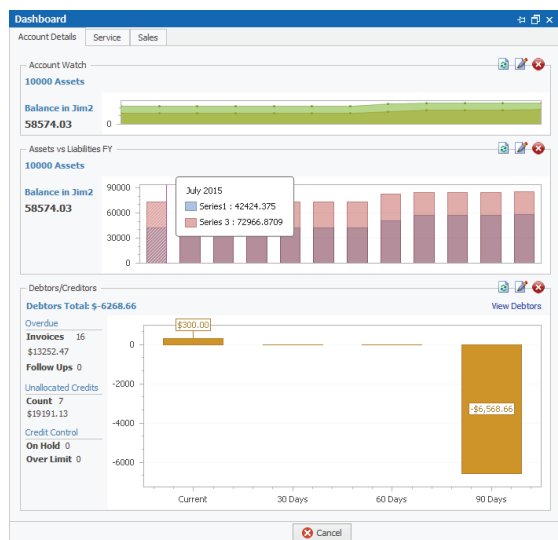
Other Jim2 Dashboard highlights:

- Fully customisable.
- You can have multiple dashboards.
- Four standard widgets that can make as many graphics as you need.
- Custom widgets available.
- Security allows you to select users or user security groups when defining access to a dashboard.

The Jim2® Business Engine Performance Dashboard

Below you can see an example of the fully featured Performance Dashboard in Jim2 with seven different displays. In this example, we are looking at the following 'widgets' (or graphs):

- Account Watch – Cash on Hand.
- Account Watch – Gross Profit vs Net Profit.
- Account Watch – Stock on Hand – This Year vs Last Year.
- Debtors/Creditors – Debtors.
- Debtors/Creditors – Debtors vs Creditors – Last 180 days.
- Account Watch – GST Collected vs Paid.
- Debtors/Creditors – Creditors.

As you can see, from just one dashboard screen, an amazing amount of information about your business is revealed.

Look at account balances, sales results, assets, liabilities and more. Use the Performance Dashboard 'Account Watch' in Jim2 to see the balance in any account from your GL.

Compare this year's sales to last year's, assets vs liabilities, and much more.

Set up your Account Watch widget to look up any account individually, or even compare it to another account or financial period – be it day, month, quarter or year.
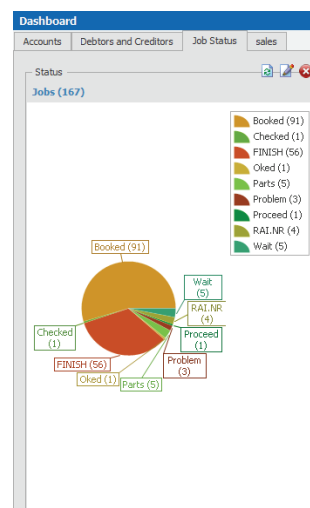
Examine the Status of Your Jobs – **Instantly**

Use the Performance Dashboard in Jim2 to see exactly where you are up to in terms of open jobs – absolutely essential for service based businesses.

Experience total drill-down, and total transparency into the service side of your business with Jim2.

Double click the coloured parts of the graph to look at the data that goes into making up each of the statuses.

For example, if you wanted to see a list of all the jobs on the status of 'booked', you would simply double click the 'booked' section of the pie chart.
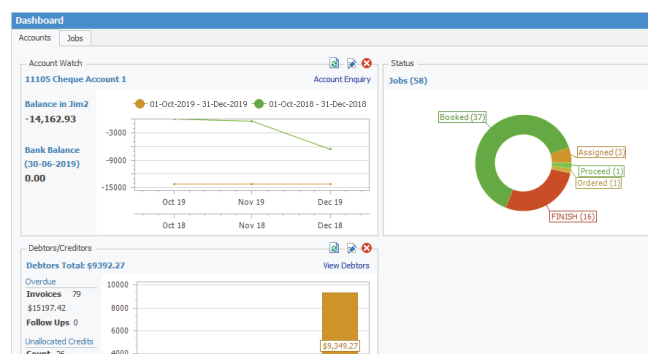

In this example, the list of 91 jobs on the status of 'booked' would appear in a list format.

Display Jobs Accurately

Use the Jobs Dashboard in Jim2 to display both active jobs or view job statistics over a period. Example usage includes:

- All active jobs by region.
- All active sales jobs by account manager.
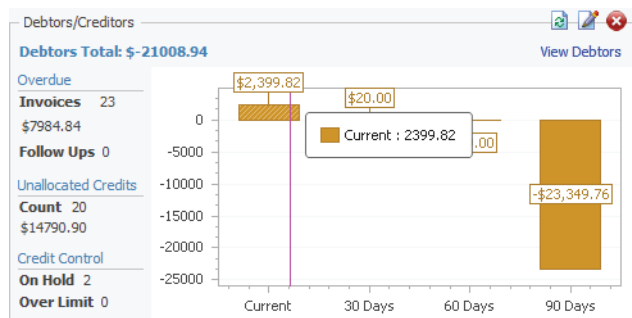- All invoice jobs for X days grouped by name displayed monthly.

Debtors/Creditors

One of the keys to controlling cashflow is to manage your debtors, and carefully monitor your creditors.

With Jim2, we make it fast and easy to get a feel for who owes you money, and to whom you have to pay.

Drill down to easily look up overdue accounts, invoices, analyse customers on credit hold, and customers who are over their credit limit.
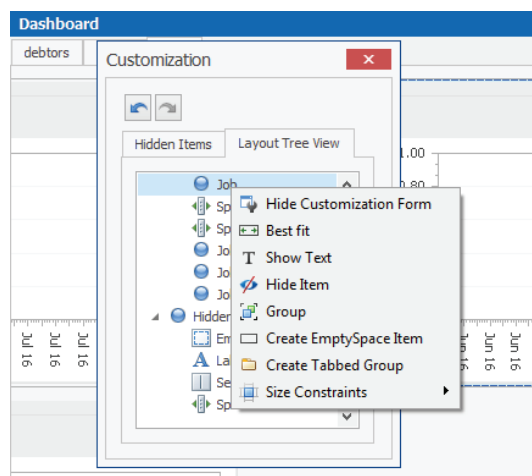

Jim2® Performance Dashboard offers full customisation

Set up the Jim2 Performance Dashboard **exactly** the way you want to see it.

Using the simple Dashboard Customisation controls in Jim2, you will have your own custom view set up in no time.

You can resize any of the widgets, group them together, lock them, or allow 'free resizing". These controls give you total freedom over the way you display your data.

Jim2 Performance Dashboard allows for true customisation.