



Happen Business Pty Limited
 29 - 33 Pitt Street
 PO Box 126, Mortdale NSW 2223 Australia
 p. +61 2 9570 4696
 f. +61 2 8569 1858
 w. www.happen.biz

Jim2 Managed Services Edition Jim2® Business Engine

Fact Sheet

Designed in Australia specifically for businesses that perform service contracts or projects for their customers,

Jim2 Managed Services Edition is a full ERP Accounting system that manages your entire business.

The Australian Managed Services Industry

There's been a lot written about Managed Services over the past year as the buzz continues.

Happen Business has responded quickly to our customers by developing an accounting and workflow business system **specifically for Managed Services.**

What are Managed Services?

Managed Services provide a *strategic* method for providing more effective operations for any type of business.

The method of providing Managed Services for a client can take many forms, however, **primarily** it is to move away from the traditional 'break-fix' model of servicing customers, and moving towards a more regular and proactive maintenance type of service.

Examples of Managed Services

- IT Backup, Storage, Operating Systems.
- Plumbing, Irrigation, Pumping Installations.
- Radio and Telecommunications Installations.
- Beverage Machine and Service Packages.

Do I Need Jim2® Managed Services?

If your business is involved with any of the following activities, Jim2 Managed Services Edition **will be of immense and immediate benefit to you**, your staff, and your bottom line.

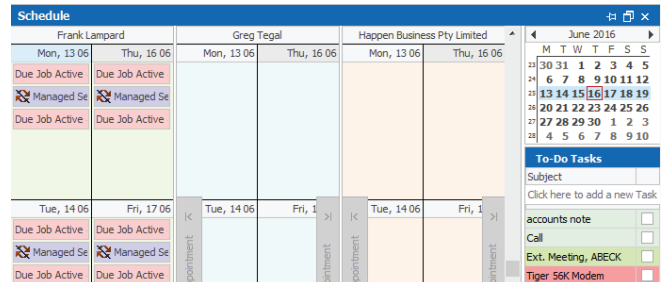
- Regular Maintenance Contracts
- Scheduled Recurring Service
- Periodic Billing
- Project Based Jobs
- External Projects

Strength of Jim2 Managed Services

A Managed Service Provider (MSP) manages and assumes responsibility for providing services to their clients.

Most MSPs bill a flat fee, which benefits their clients by providing them with predictable service and support costs.

Handling all this in Jim2 is where the automation starts and the double-handling stops. No more separate systems, and no add-ons, as it's all in the one system.

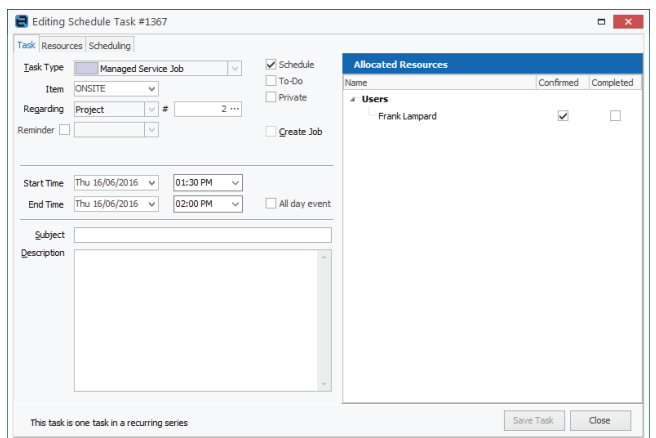


What does Jim2 Managed Services Edition actually do?

- Management of contracts – length, SLA's, key personnel, eg. Account Manager.
- Billing – monthly, weekly, daily... *whenever you want it to happen.*
- Adding and recording service jobs.
- Ability to schedule both recurring and 'ad hoc' Jobs.

Setting Up Jim2 Managed Services

- You can set up Managed Services tasks.
- You can schedule resources.
- Auto-creation of Managed Service Jobs, eg. weekly maintenance jobs.



Easily Set Up New Contracts and Unified Billing

New Project Templates are a huge addition for our Managed Services customers, as they take the work out of setting up new contracts in Jim2. Create a range of detailed templates for your most popular contracts, and turn the drudgery of repetitive job administration into a simple task.

Always forgetting to add important steps to a project? Project templates ensure you'll never forget! They guarantee the finer details aren't missed – tick all the boxes, include all the revenue, maximise the margins, minimise the risks.

Signing up a new customer to a new contract? Choose from your list of project templates to easily set up the entire project activities in Jim2.

Projects feature now includes full dynamic kit support on jobs in the Jim2 Managed Services Edition, enabling businesses to completely customise which stock is listed (or hidden) on an invoice, using dynamic kits on jobs (billing or otherwise). No more editing billing jobs to suit a specific product or client's requirements.

It's the most comprehensive addition of this exciting release. A huge win for our Managed Services customers!

Jim2... Smart, Sexy & Unique

- You can create a P&L Report by **contract**
- You can run a list of Contracts by:
 - Customer
 - Contract Type
 - Contract Group
 - Technician
 - Site.

Job Profit As of 12-10-11 (summary) Contract Profitability										
Stock Code	Description	Qty Sold	Labour Content	Avg Cost	Total Cost	Avg Selling Price	Total Selling Price	Gross Margin%	Gross Margin\$	% of Total Sales
Stock										
HP	Northwood (S.NET)	1.00		\$10.00	\$10.00	\$200.00	\$200.00	95.00%	\$390.00	47.66%
HP	MOUSE WHEEL	2.00		\$16.11	\$32.22	\$20.45	\$40.91	21.23%	\$6.69	2.18%
MS SERVER	Monthly Server maintenance (S.NET)	2.00		\$0.00	\$0.00*	\$100.00	\$200.00	100.00%	\$300.00	75.25%
MS SERVER	Monthly Server maintenance (S.NET)	2.00		\$0.00	\$0.00*	\$100.00	\$200.00	100.00%	\$300.00	75.25%
MS WORKSTATION	Monthly Server maintenance (S.NET)	15.00		\$0.00	\$0.00*	\$20.00	\$300.00	100.00%	\$300.00	75.25%
MS WORKSTATION	Monthly Server maintenance (S.NET)	15.00		\$0.00	\$0.00*	\$20.00	\$300.00	100.00%	\$300.00	75.25%
Stock Total:		37.00			\$42.22		\$1,440.91	97.07%	\$1,398.69	350.82%
Actual Labour										
Labour Type	User	Hours	Minutes							
Onsite	HR	15.00		\$45.00	\$675.00					
Remote	SYS	8.00		\$35.00	\$280.00					
Travel	HR	1.00		\$45.00	\$45.00					
Actual Labour Total:		24.00	24.00		\$1,000.00	\$0.00	\$0.00	0.00%	-\$1,000.00	(250.82%)
Total:					\$1,042.22		\$1,440.91	27.67%	\$398.69	100.00%
Total for all Jobs:					\$1,042.22		\$1,440.91	27.67%	\$398.69	100.00%

And THEN run a profit report on any of those lists.

TOTAL DRILLDOWN... TOTAL TRANSPARENCY.

Can your current business system do this?

And last, but not least, you can run **individual Project Profit and Loss** reports.

Jim2 Managed Services Edition is not your average, run of the mill ERP, Accounting and Workflow software.

It's the SMART FEATURES that make it so special.

Jim2 Managed Services Edition does more than handle your billing for each contract:

- Schedule phone calls.
- Schedule reviews.
- Schedule meetings.

All these tasks can be tied to a project. Never forget a call, never lose your notes...it's all in **one place**:

Jim2 Managed Services Edition.

Jim2 is ALL ABOUT Integration

If you have information about the project, Jim2 Managed Services Edition has a place to record that information and tie it PERMANENTLY to the Job.

- Project Notes:** Write notes and have them recorded directly against the Project.
- Watchout Notes:** Watchout Notes are **exclusive** to Jim2, and provide you with the ability to create active reminders within the workflow of a Project, eg. **Adding a Service Job** – if the business is not open on Saturdays for Service, a 'Watchout Note' pops up and reminds whoever is entering the job that first available is Monday morning.
- Contract Specific Pricing:** eg. **Adding stock to a job** – it will use 'Contract Pricing', not Standard Pricing level. Contracts usually have different pricing to regular service, and Jim2 handles this with sophistication and ease.
- Setting Up Multiple Contract Types for the Same Service:** Jim2 can set up levels of pricing for the same service depending on the contract. For example:
 - Gold** standard labour rate = \$180/hr
 - Silver** standard labour rate = \$110/hr

Specific Contract pricing will then show up on the invoice.

How Do You Manage All This Without Jim2?

- Use multiple spreadsheets.
- Collate all that information.
- Transfer this information to your accounting system – which means double entry of data, and a waste of time.
- Use non-integrated software such as Outlook for scheduling (*and there's no tie-in to the job!*).

Sounds like a complicated, convoluted process doesn't it? The solution?

Jim2 Managed Services Edition

What Are You Missing Out On?

Have you turned down business because your accounting system could not handle it? Have you lost opportunities because your business system is inadequate?

If your business system is flexible, can handle recurring billing, and add value to your customers, then you can confidently go and offer a managed service to your clients.

Managed Services means better service for your clients, and a **regular, steady income** from your clients.

Related Jim2 Business Engine Products for Jim2® Managed Services Edition

Jim2 Mobile

Perfect for sales and service staff. Update jobs as they happen from any location, using the native iOS app. Connect your staff to Jim2 back in the office.

Jim2 eBusiness Service

Automate your customer service today, and let your technicians record job information on the run!

See also: Jim2 Mobile and Happen Cloud Fact Sheet
eBusiness Service Fact Sheet
Jim2 Retail Fact Sheet

