

Jim2® Mobile  
 Jim2® Business Engine

# Fact Sheet



Jim2 Mobile is the innovative mobile application for iPhone and iPad, which takes business software out of the office and onto the road.

Jim2 Mobile keeps you always connected, improves workflow, streamlines business processes, and mobilises your workforce.

Ideal for:

- **Sales people out and about with customers:** check real time stock levels, create quotes without waiting to return to the office, and gain a customer signature on the spot. They now have each customer's information, documentation, email correspondence, and more, on hand – ready to pick up where their last conversation left off.
- **Technicians and service staff:** have their tasks for the day at their fingertips. Jim2 Mobile's integrated Timers allow them to simply and easily keep track of labour and travel hours owed for each job.
- **Managers and business owners:** access vital stats on your business wherever you are, and Lists with you when you're out of the office.

Jim2 Mobile is carefully created to ensure that it provides users with the same simple and intuitive user experience they've come to expect from Jim2 Business Engine.

A clean interface and simple navigation makes tasks such as checking task lists and emails, adding and editing jobs, and scheduling appointments a breeze.

*"Mobile access has made a significant improvement to our service control and allocation of service calls. With 18 technicians across four branches, we no longer need to email or phone technicians with their next service call."*

**Bob Cotter, Group General Manager, Digital Document Solutions**

*"Without a doubt, it's made a huge difference to the service we offer customers by creating quick quotes then and there, rather than saying we will check and get back to them"*

**Dallas Jarrad, Operations Manager, Pt Hydraulics Australia**

## Features at a Glance

### Today

All the information you need for the day in one spot, including due Jobs and Orders, Appointments and To-Do tasks. Easily add tasks on the fly.

### Jobs & Orders

Add, manage, and update jobs or sales orders from your iPhone or iPad. Update notes, stock and labour on the spot, available to the support team back in the office. Access to all your Job/Order lists with counts and unread email indication.

### Timers

Inbuilt Labour Timers track and charge for every hour at a meeting, on-site or travel time en-route. Start, stop and pause functionality enables managers to see where valuable time is spent in your business.

### Quotes & Leads

Create or view saved quote lists, and follow up leads and quotes while on the road. Quickly add related tasks, To-Dos, and emails. Track customer interactions, linking their quotes, purchases, jobs and payments in one solution,

### Schedule

Easily keep track of your own and your colleagues' meetings, tasks and business appointments. Easily group and filter resources as required.

Confirm, complete and reschedule tasks in a touch.

### Email

Business emails all managed within Jim2 and linked to the relevant job, customer, transaction and/or process.

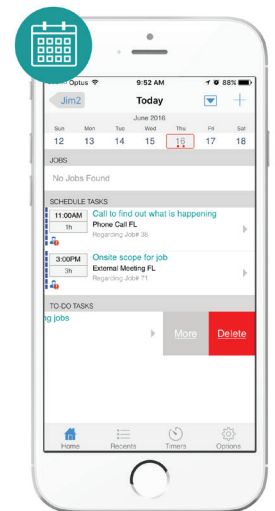
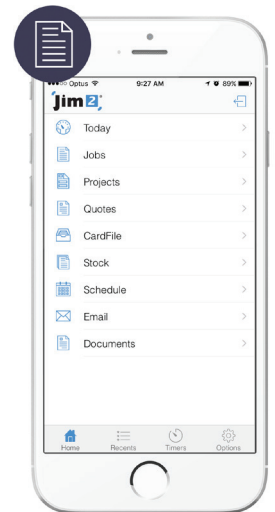
Access all your email queues, read and create new emails with attachments and signatures.

All email functionality exactly the same as you're used to in Jim2 at the office, including templates, tagging and related objects.

### CardFile

Customer details and contact information at your fingertips.

CRM By Touch: Link Tasks and Jobs to CardFiles to keep all relevant information together, and easily accessible. Make a call directly from any CardFile. Tap an address and you will be shown exactly where it is on the map.



## Stock

Check current stock levels on the spot, and in real time.

PLUS, add orders on the go by simply swiping to select/add stock in seconds, dramatically decreasing order entry time. Quickly access related and recently purchased stock.

## Reports

Create reports via Jim2 Mobile, such as job sheets and invoices.

## Signable Reports

Capture a client's signature on the spot, and save the signed document automatically to Jim2. Now find signed delivery dockets, onsite slips and quote acceptances stored in Jim2.



## Documents

Access any business document found in Jim2 from the palm of their hand. View contracts, brochures, images, in any format (PDFs, pictures, MS Office documents) from Jim2, and easily send a copy to your client.

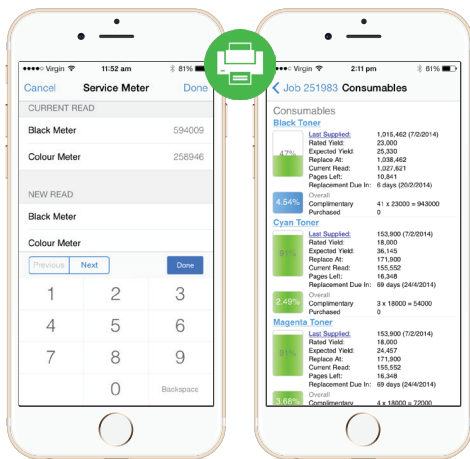
## Projects, Contracts & Machines

Easily view Managed Print and Managed Services Contracts and Projects, along with all related Jobs, contract details, and billing and consumable status.

Quickly create Project related Jobs including Service and even MPS billing jobs!

## Managed Print Services Edition

Just like Jim2 Business Engine, Jim2 Mobile has a fully tailored version for the unique needs of the Managed Print Services industry.



## Easy to Navigate

### Follow me login

The Jim2 Business Engine 'Follow me' login feature ensures that Jim2 will follow you around the network. When you log in to Jim2 Mobile, find each of your lists and Navigation Tree organised in a way that's identical to Jim2 on your desktop. When you make additions or changes to your desktop, you'll also find them when in Jim2 Mobile.

### Easy login

Access Jim2 Mobile using FaceID, TouchID, Pin code or your Jim2 user password.

### Scroll, tap and swipe

It's easy to navigate between your schedule, work in progress, and emails. Simply scroll through your records, tap an entry to take a look, and swipe to add new stock. Jim2 Mobile includes a number of features to make updating your software a breeze.

### Recents

Find the most recently opened records in Jim2 Mobile Recents list. Any Document, CardFile, Quote, Job or Stock you've looked at or worked on is quickly reopened from this list.

### Scan Jim2 Barcodes

Simply scan Jim2 barcodes to search and open a Job, Quote, Stock, Project and Machine in an instant. Incredibly fast, amazingly convenient. Jim2 Mobile includes features created specifically for your managed print service business, including easy-input Service Meter Reads and trackable Yield.

## Availability

Jim2 Mobile is available on iOS devices:

- All Licensed Jim2.Cloud users as subscription includes access to both the desktop and mobile app.
- Add to an on premises subscription of Jim2 Business Engine with the addition of subscription to the Happen Cloud.

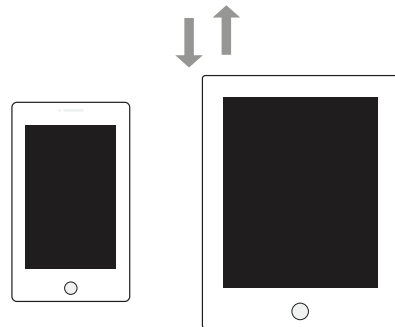
## Happen Cloud

Your data is safely connected to the main office database via the secure Happen Cloud, to make sure everyone is in sync across the system.

The Happen Cloud is key to secure data storage and transfer between the office database and mobile devices.

## Licensing

Contact our sales team to discuss licencing of Jim2 Business Engine and Jim2 Mobile.



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All our products are designed and developed in Australia. Visit [www.happen.biz](http://www.happen.biz) for further information on Jim2® Business Engine or contact Happen Business directly on +61 2 9570 4696.

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