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## Scheduling Jim2® Business Engine

# Fact Sheet

### Jim2 Scheduling and Todo List

Introducing Jim2 Scheduling – a fully integrated resource management and task list feature set that enables you to coordinate, track and manage your staff resources.

Jim2 Scheduling lets you instantly see what your teams are up to. You can view, allocate and edit tasks, meetings, phone calls and appointments – all linked to Jim2 stored information such as Jobs, Quotes and Cardfiles.

### Simplified Resource Management

Jim2 Scheduling gives you multiple ways to see what's going on – by person, by group, or by the entire company:

- 'Outlook' style calendar views show you scheduled tasks by day, week, working week, month, year, time grid or by current day plus 7 days.
- Tasks can be grouped by Time, Resource or no grouping.
- Tasks can also be viewed by individual, by a number of individuals, by definable groups, or by all resources.
- All tasks are colour-coded for quick visual filtering.
- Unconfirmed appointments and tasks are highlighted.
- Tasks can be instantly linked to related Jim2 objects including Jobs, Quotes, Purchases, Return from Customer, Return to Vendor, Debtor, Creditor and Cardfile.
- Reminder in lower right hand corner.

### Flexible and Feature Rich

- Scheduling automatically opens on startup and the Scheduling User Interface is located in the top ribbon.
- Modify your current view or default view to include any period by simply dragging your cursor over the calendar.
- Show or exclude 'Types' of tasks to simplify your view.
- Specify and only view hours of work – defined by you, to suit your business.
- Create and save your own custom views (for example, by members of your on-site or off-site customer service teams) so you can easily switch between calendar views that match your business processes.
- Schedule tasks from your Todo list to appear on your calendar, or add calendar items to your Todo list at the click of a button.
- Set future tasks to follow up with creditors and debtors.
- Assign multiple resources to a task directly from Jim2 Users or Cardfile contacts. Tasks can also be left unassigned and then assigned to resources at a later date.
- Dynamically move, edit or reassign tasks – and all users' calendars will automatically update.
- Instantly drill down on tasks to access related Jim2 objects such as Jobs, Quotes, Debtors, and Creditors.
- Flag tasks as 'Private' to hide from other users' view.
- Synchronise to Microsoft Outlook for off-site use on PDAs or notebooks.

The screenshot displays the Jim2 Scheduling software interface. At the top, it shows the user 'System administrator' and the date range 'Monday, 11 June' to 'Friday, 15 June'. The main area is a calendar grid with time slots from 9:00 to 1:00. Tasks are represented by colored blocks: pink for 'Due Job Inv'd #236', green for 'Ext. Meeting - Ext. Meeting', yellow for 'Phone Call', and blue for 'Int. Meeting - Sales Meeting' and 'Job #18, Sales'. A 'To-Do Tasks' panel on the right lists tasks with checkboxes for 'Redaim Gas', 'Outstanding Amount', and 'Adding a Test Note'. A 'Job #18 Sales' popup window provides details for a task on Thursday, 14/06/2018, including start/finish times, status (FINISH), priority (Normal), and ship address (Unit 26-30 Sirius Lane, LANE COVE, NSW 2066). A tooltip indicates 'Hover over entry and it will pop up with information'. The bottom of the interface features 'Refresh' and 'Cancel' buttons, and 'Create Managed Jobs' and 'Outlook Sync' options.

## Task Detail

Double-clicking on a task opens a detailed view that provides a longer description and shows additional information such as Task Type, Labour Type, Priority, which resources have been allocated to the task, and any Jim2 related objects (Jobs, Quotes, etc).

All tasks are colour coded by type for instant recognition. Task types include:

- **Jobs:** Add tasks to a specific Job. Specify multiple resources (Jim2 Users) and Labour Type such as Travel, Sales, Build and Onsite.
- **Phone Calls:** Easily schedule calls and assign others to conference calls. Add calls to your Todo list and tick off when completed.
- **Internal/External Meetings:** Allocate resources and/or Cardfile contacts to meetings. Relate meetings to a Job, Quote or other Jim2 object.
- **Holidays/Leave:** View who is on holidays or away ill.
- **Personal:** Keep personal tasks and appointments on your calendar (personal tasks are hidden from others).
- **Anniversary:** Set anniversaries for staff and customer birthdays or other important events.

When assigning tasks to individuals, Jim2 provides an instant snapshot that let's you know if people are busy, or whether you need to move the task to a more suitable time.

## Integrated 'Todo' task list

Jim2 Scheduling features Todo list functionality that gives each user an individual detailed task list – seamlessly integrated with their calendar.

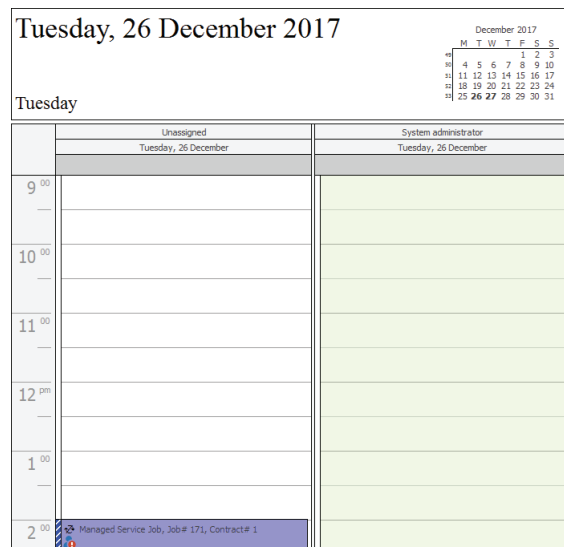
The task list can be sorted by Task Number, Completed, Task Type, Name, Subject, Priority, Due Date and Due Time, and shows end date for recurring tasks.. Tasks from your Todo list can be selected to appear on

your calendar, and alternatively calendar items can be selected to show on your Todo list.

Completed tasks are shown in grey, while overdue tasks are highlighted with a red Due Date or Due Time field.

## Resource Management Reporting

Jim2 Scheduling includes a report generator that allows you to easily produce calendar-style reports. It comes ready to use with reports for Day, Week, Month and Year, or you can create and save customised reports to meet your specific needs.



## Fully Integrated

Unlike other scheduling products that rely on a separate contact database, Jim2 Scheduling is a completely integrated solution.

This means you can instantly allocate tasks or set up meetings using any of the contacts in your Jim2 system – and you don't have to learn or maintain a separate scheduling tool.

Jim2 Scheduling also uses your existing security and user access privileges.

**All the power and proven functionality you've come to expect from Jim2 Business Engine – now including fully integrated Scheduling.**

See also: [User Interface and Workflow Fact Sheet](#)  
[Jim2 Mobile and Happen Cloud Fact Sheet](#)

