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Jim2® Business Engine  
Version 3.2 Service Release (all editions)

# Service Release

## Jim2® Business Engine v3.2 Service Release Notes Thursday 26th April 2012

### Jim2® v3.2 Service Release - Build 3850

This document covers new features and enhancements made to Jim2® v3.2 since being officially released in November 2011. Many of the enhancements included in this service release are based on feedback provided by Jim2® users. We have also included a couple of great new features in this service release rather than wait until the next full release.

**We strongly recommend all users upgrade to the current version of Jim2®.**

Please read this document in conjunction with the original Jim2® v3.2 Release Notes.

#### Jim2® Email Integration feedback

Jim2® v3.2 introduced the new email integration. The feedback we have received has been extremely positive...

*"The latest version of Jim2® has offered a massive improvement for Betta Computers in keeping all inbound and outbound email correspondence attached to the appropriate area of Jim2®. We no longer need to search personal outlooks or folders to find Job, Quote, Purchase and other information. This has made all departments run a lot smoother."*

**– Troy Adams, Managing Director, Betta Computer Services**

## Features and Enhancements summary - All Editions

The following features and enhancements are for all editions of Jim2® v3.2 (Premium, MPS & Managed Services)

### Email – Updates/Enhancements

- New {{System.User.Email}} email macro
- Email printing now defaults to printer's default paper size (typically A4)
- New 'Show Users' tickbox when selecting email addresses in To/CC/BCC
- Now displays [no text] in comments grid if an email's summary text is deleted or no email body
- Now handles digitally signed emails
- Email Account Setup allows testing of email accounts and displays email count to be downloaded
- Now only sets email subject from a template if template's subject is not blank

### Stock – Update

- Now warns if changing a Stock's 'Qty Dec Places' to a smaller value

### Stock Attributes – Enhancements

- Updated auto-complete feature when adding attributed stock – typing '\ ' will auto-complete the Stock Code and allow you to then quickly enter an attribute template
- Attribute Templates can now have a sort order – this sort order is used when selecting attributes from the Attribute Selection screen
- New Stock Attribute option – always show attribute templates in Attribute Selection (zero values)
- Multi-select attributed Stock from Attribute Selection screen (same as Stock Selection in Jobs and Quotes)

### Stock Packages – Enhancements

- Package List now displays the number of packages on hand
- Package Session now displays the number of packages on hand
- The default package method (Individual or Batch) can now be set via **Options > Stock > Packaging Method**

### Stock Adjustments – Enhancements

- Stock Adjustments now display the 'actual' cost of stock once finished when doing 'Qty-' adjustments.

### Stock Procurement

- Daily average now only calculates if at least 30 days history



## Sales Register

- Now displays count and total when grouped by 'Invoiced By'

## Dashboard – Account Watch Widget

- New Period selection – now allows you to specify how many periods you wish to view
- New 'Exclude Current Period' option allows you to, say, look at the last 3 financial years (including or excluding the current one)
- New 'Display Jim2 Balance' option allows you to hide the current GL balance
- Now allows both Yearly and Fin. Yearly periods

## Jobs

- Item lookup now uses the new Item select screen

## Batch Invoicing – Enhancements

- Now allows you to optionally ignore invoice related Watchout notes
- Now displays the email address an Invoice will be sent to if emailed
- Now displays 'Don't Send' if using the global option to not print after invoicing
- Now updates parent node (Customer) to 'Invoiced' to all child nodes are successfully invoiced.

## Return From Customer – Enhancements

- Now uses same options for default stock location as Job, eg. 'Use Customer branch for default stock location'

## Purchases – Consign Buy

- Now does not show Watchouts when using the new 'Add Stock off Consign In.' feature

## User Interface – Ribbon

- Ribbon now expands/collapses correctly in low resolutions (1024x768 for example). Previously the Report Toolbar would 'group' when used at this resolution.
- Updated Stock/CardFile/Item/Project Group selection (&/OR function now in group selection control)

## General updates and fixes

- Many speed and performance enhancements, including smarter scheduler refreshing and loading of Jobs and Quotes
- Updated Help File (GST updated and Email added)
- Updated Stock Profit report (now includes DPO)
- Invert 'Project Type' in Jobs lists
- Send Email filter fixed
- Formatting issue with HTML tables in email fixed
- Account Manager now defaults when doing Billing Jobs
- Warehouse Management details fixed
- Issue printing P&L and Balance Sheet reports fixed
- Issue when viewing Emails sent from a deleted Email Account fixed
- Emails not linking when sending two or more from a Job in Add mode fixed
- Watchouts not appearing for MACHINE, Add Consumable Job WHEN the Consumable Job is added from a Machine list
- Other Copier updates – Generic XML and CSV Meter Imports and the Toshiba Meter Import.

# Options Updates

## Options > RFC > Use Default Branch Options

Allows RFC to use the default Branch related options rather than as per the original Invoice

## Options > Job > Show Customer Account Balance

Now also displays Customer Terms COD, NET7 etc

## Options > CardFile > Password Welcome Email

Now displays available email marcos

## Options > Stock > Packaging Method

Allows to set the default package method (Individual or Batch)

## Options > Item > Use Stock Descriptions on Item

When an Item adds Stock to a Job or Quote, use the Item's Stock description rather than the Stock's.

# Security Updates

Job Account On Hold/Credit related warnings now only shows credit limit and customers balance based on **Jobs > Show Customer Account Balance** security setting.

**Search Jim2** now takes into account all security settings. For example, cheques won't be displayed in search results if a user does not have security to view Cheques.