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Jim2® Business Engine
Version 3.00 Service Release (all editions)

Service Release

Jim2® Business Engine v3.00 Service Release Notes Monday 21st September 2009.

Jim2 v3.00 Service Release - Build 3124

This document covers new features and enhancements made to Jim2 v3.00 since being officially released in May 2009. 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 - Jim2 v3.01

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

Please read this document in conjunction with the original Jim2 v3.00 Release Notes.

New Jim2 User Interface feedback (the 'Ribbon')

Jim2 v3.00 introduced the new ribbon user interface. The feedback we have received has been extremely positive with most people reporting quick take up and improved useability.

"I love the new ribbon. I find it easier to understand and more user friendly. For the first time I felt comfortable browsing around..."
A Jim2 User commenting on the new ribbon interface.

Features and Enhancements summary - All Editions

The following features and enhancements are for all editions of Jim2 v3.00 (Premium, Photocopier & Managed Services)

1. Bpay - Support for customers paying via Bpay

Bpay provides an easy and safe way to accept payments from your customers. Jim2 now fully supports payments via Bpay with enhancements to CardFiles to automate the generation of Bpay Cust Ref# numbers, new options to allow for biller code and updated Invoices and Statements. Contact your bank to enable Bpay customer payments.

2. Quick Add CardFile - Extra fields, Ship CardFiles and new default option

New fields and the ability to add Ship CardFiles on the fly. New Quick Add CardFile option depending on if you're a wholesaler or a retailer.

3. Batch Invoicing - Auto email Invoices

Jim2's powerful batch invoicing now allows automatic sending of Invoices via email.

4. Scheduler - New Time Grid layout and enhancements

Scheduler has an improved layout allowing more resources to be displayed and making better use of screen real estate.

5. Task List - Recurring Task support and enhancements

Task List now displays recurring, multi-resource and tasks with reminders with detailed 'mouse over' hints.

6. New CRM function: Debtors/Creditors Lists - Show all feature

Debtors and Creditors list can now display all Customers/Vendors regardless if they have a balance or not. Great for sending out with newsletters and increasing sales.

7. Stock Procurement - New Selected Bulk location feature

Stock Procurement now allows you to force transfers from a specific stock location. This is extremely useful for sites with multiple branches that use vans as locations.

Cont'd over



8. Item Import - New feature

Jim2's data import now allows the importing of Items (Job templates).

9. Help File - updated and enhanced

The Jim2 Online Help File has been updated and enhanced. Expect further improvements in upcoming releases. Be sure to check out the 'shortcuts' section. *(To use Jim2 Help, simply press F1 on your keyboard)*

Features and Enhancements summary - Photocopier Edition

The following features and enhancements are specific to the Photocopier Edition of Jim2 v3.00.

P1. Machines - New Request#

Machines now have a separate Request# CardFile field allowing requests to be sent to contacts not related to the Machine's Cust# or Ship# CardFiles. The update program will automatically update the Request# to the existing Ship# CardFile code.

The Request# allows you to specify the billing Cust#, the Ship# or site, and then have the billing request sent elsewhere. Perfect for larger organisations such as councils and universities etc.

P2. Machines Meter setup - Specify billing CardFile

Machine Meter Setup now allows you to specify a billing CardFile that is different to the machine's Cust#. This allows you to bill a 2nd party without having to setup a 2nd party billing meter in the case that all billing is to the 2nd party.

P3. Machines Options - Auto BCC Page Request

Machine Options (Tools > Options > Projects) now includes 'Auto BCC Page Requests' options. When ticked page request will be BCC'ed to the currently logged Jim2 user allowing confirmation that requests have been sent.

P4. Copier Machine Reports - 4 new reports

4 new extremely useful reports based on Jim2 User feedback.

Features and Enhancements detailed - All Editions

1. Bpay - New Feature

Bpay provides an easy and safe way to accept payments from your customers. Jim2 now fully supports payments via Bpay with enhancements to CardFiles to automate the generation of Bpay Cust Ref# numbers, new options to allow for biller code and updated Invoices and Statements. Contact your bank to enable Bpay customer payments.



The following areas in Jim2 have been updated for Bpay support...

CardFiles - Customer tab

The CardFile customer tab now includes a 'Bpay Ref#' field. This is the unique Bpay Ref# for that specific customer. By being specific to a customer, rather than an Invoice, allows your customers to pay multiple invoices in one Bpay transaction and avoids the problem of the Bpay Ref# changing each time a customer uses Bpay. The Bpay ref# uses the standard 'modular 10' encoding.

The screenshot shows the 'Customer' tab in the CardFiles interface. Fields include: Terms (14DAYS), 14 days from invoice date, Price level (1), Credit Hold (checkbox), Credit Limit (1000.00), Cust PO #, Acc. Fee % (0.00), Currency (AUD), and BPAY Ref# (0014688). A red arrow points to the BPAY Ref# field.

CardFile List

You can bulk update CardFiles with a 'Bpay Ref#' from a CardFile List. Generate a CardFile List based on any criteria, and then right click, and select 'Generate Bpay Reference#'. CardFiles will then be updated with a unique Bpay ref# based on Jim2's internal CardFile code.

Options - Job > Invoice

Job > Invoice options now includes a 'Use Bpay' option to enable Bpay and setting of your 'Bpay Biller code' as issued by your bank.

The screenshot shows the 'Job > Invoice' options dialog. The 'Use BPAY' checkbox is checked. The 'Biller Code' field contains the value 91909190.

Reports - System data pipeline

The Report Designer's 'System' data pipeline has been updated and now includes the 'Company Bpay Biller code' as set in options.

2. Quick Add CardFile - Customer or Ship and enhancements

The popular Quick Add CardFile function has been greatly enhanced and now allows the following additional information to be entered:

- Account Manager
- Customer Price Level
- Customer payment terms
- CardFile Groups
- Default Branch
- Default Sub-Branch
- Default GL Dept

The screenshot shows the 'Add CardFile' dialog box. Fields include: Card Code (HAPPEN.BUS), Company (selected), Customer (checked), Ship (unchecked), Name (Happen Business), Address (Suite 2, 29-33 Pitt St), Suburb (MORTDALE), State (NSW), PostCode (2223), Country (Australia), Acc. Mgr (SYS), Price level (1), Terms (7DAYS), Groups (Education PMP), Branch (SHEP), SubBranch, and GL Dept (ADMI). Save and Cancel buttons are at the bottom.

Ship or Customer CardFile

In addition you can now select the CardFile to be added as a 'Ship' rather than the default 'Customer' CardFile.

Options - CardFile - Quick Add default

Options > CardFile now includes the default 'Quick Add' type. If your company is more retail orientated you would select 'Individual' as the default whereas wholesalers would select 'Company'. This is used to automatically generate CardFile codes based on the type of customer.

The screenshot shows the 'Quick Add defaults' dialog. The 'Company' radio button is selected, and the 'Individual' radio button is unselected.

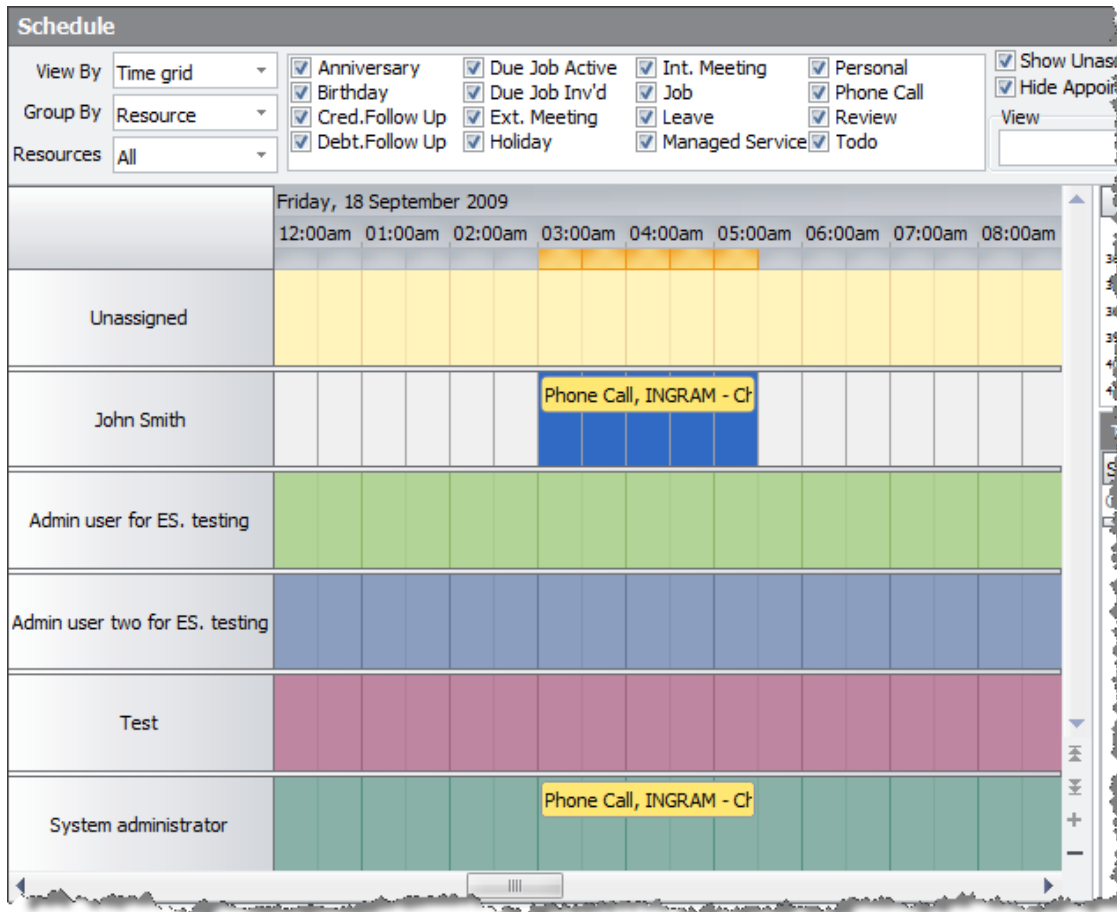
3. Batch Invoicing - Auto email

Batch invoicing (invoicing multiple Jobs and Customers from a Job List) will now automatically email the invoice to a customer based on the customer's 'Send Invoice via' CardFile default.

4. Scheduler - New Time Grid layout.

Scheduler has an improved 'Time grid' layout. Resource names are now displayed horizontally allowing more resources to be displayed and making better use of screen real estate.

Simply click the arrow in the 'View By' field to see the new 'Time Grid' layout option.



5. Task List - Enhancements

Task List (**Scheduling > Task List**) now includes columns indicating if tasks are recurring, have reminders, have multiple resources assigned, and have been confirmed.

Additional features include:

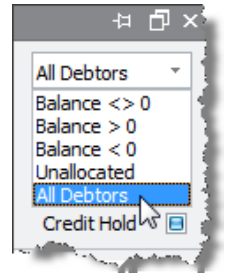
- Hint over recurring tasks displaying the starting recurrence
- Name now defaults to current user
- Date now defaults to current date
- Improved selection layout
- Support for 'Managed Service Job' tasks
- New 'Job related' task type (displays both Job and Managed Service Job task types)

Drag a column header here to group by that column							
			Task#	Todo	Completed	Task Type	Name
			1	<input type="checkbox"/>	<input type="checkbox"/>	External Meeting	System administrator
			2	<input type="checkbox"/>	<input type="checkbox"/>	Phone Call	System administrator
			5	<input type="checkbox"/>	<input type="checkbox"/>	Job	System administrator
			3	<input type="checkbox"/>	<input type="checkbox"/>	Managed Service	System administrator
			6	<input type="checkbox"/>	<input type="checkbox"/>	External Meeting	System administrator
			7	<input type="checkbox"/>	<input type="checkbox"/>	Managed Service	System administrator
			8	<input type="checkbox"/>	<input type="checkbox"/>	Job	System administrator
			9	<input type="checkbox"/>	<input type="checkbox"/>	Job	System administrator
			10	<input type="checkbox"/>	<input type="checkbox"/>	Managed Service	System administrator
			20	<input type="checkbox"/>	<input type="checkbox"/>	External Meeting	Admin user for ES. testing
			20	<input type="checkbox"/>	<input type="checkbox"/>	External Meeting	System administrator
			20	<input type="checkbox"/>	<input type="checkbox"/>	External Meeting	Admin user two for ES.

6. *NEW CRM FUNCTIONALITY* Debtors/Creditors Lists - Show all feature

Debtors and Creditors list can now display all Customers/Vendors regardless if they have a balance or not. Great for sending out with newsletters and increasing sales.

To use this feature from a Debtors List select 'All Debtors' or from a Creditors List select 'All Creditors' and click 'Run'.



7. Stock Procurement - New Selected Bulk location feature

Stock Procurement now allows you to force transfers from a specific stock location. This is extremely useful for sites with multiple branches that use vans as locations.

There are now three methods that Stock Procurement can use to generate Stock Transfers from other locations.

7.1 All Locations

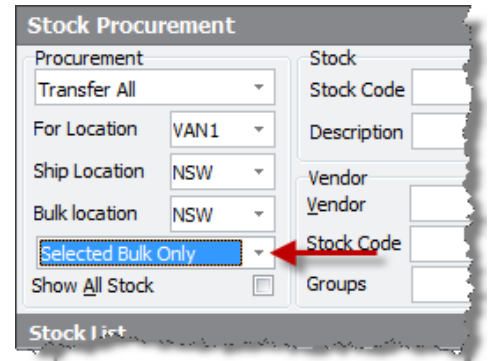
Stock Procurement will generate transfers from all locations and will suggest a location to transfer stock from.

7.2 Bulk Only

Stock Procurement will generate transfers from stock locations flagged as 'Bulk' locations and will attempt to transfer from the selected 'Bulk' location.

7.3 Selected Bulk Only

Stock Procurement will generate transfers from the selected 'Bulk' location only.



Example:

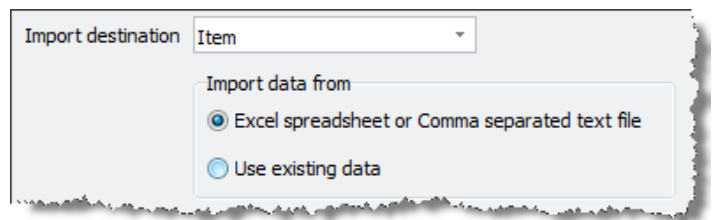
You have vans that you want to 'refill' so you wish to force a stock transfer from a specific location. If the stock is not available in that specific location you still want to place the transfer so that the stock can be ordered and then transferred to the van.

- Change procurement type to 'Transfer All'
- Select the bulk location
- Select 'Selected Bulk Only'
- Click run.

8. Item Import - New feature

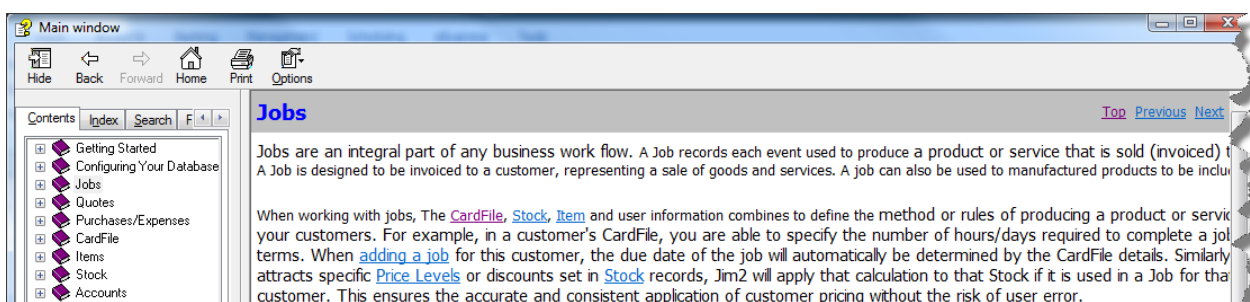
Jim2's data import now allows the importing of Items (Job templates).

From **Tools > Import Data** select 'Item' as the import destination. Select an Excel or CSV file and import as normal.



9. Help File - updated and enhanced

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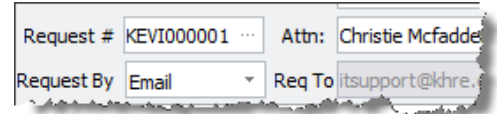
Jim2 Photocopier Edition Features & Enhancements detail

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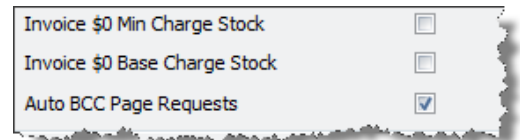


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Machine Meter Setup now allows you to specify a billing CardFile that is different to the machine's Cust#. This allows you to bill a 2nd party without having to setup a 2nd party billing meter in the case that all billing is to the 2nd party.

P3. Machines Options - Auto BCC Page Request

Machine Options (Tools > Options > Projects) now includes 'Auto BCC Page Requests' options. When ticked page request will be BCC'ed to the currently logged Jim2 user allowing confirmation that requests have been sent.



P4. Machine Reports - 4 NEW Jim2 Photocopier Edition Reports

New reports:

Report Location	Report Name	Report format	Description
Machine	Machine - Service History	Report	This report outlines all of the previous services jobs in a customer centric fashion. It displays all of the machines response times, parts used and job comments.
Machine List	Machine List - Meter Profit	Spreadsheet	This report analyses the black and colour volumes, the total income and the GP% broken up by Month. The report is grouped by Customer, Item or Machine.
Job List	Job List - Machine Response times	Spreadsheet	This report looks at the time taken between Date In and the first labour entry and it compares it to the required days and hours on the Machine record.
Job List	Job List - Parts Spent	Spreadsheet	This report lists by spare parts spent grouped by Technician, Item, Customer or Machine.

Technical Information & Requirements

Windows Vista Support

Windows Vista (all editions) is supported by Happen and is compatible with Jim2 BE v3.0.

Current Jim2 Business Engine Database: V156

To upgrade from Jim2 v2.19 to Jim2 v3.0 backup your database then run **Jim2Upgrade_v30_3124.exe** from your server.

The Jim2 update program will automatically update existing Version 2.18 or higher databases to the current Version 3.0. That is – by running the Version 3.0 upgrade, you will have access to these new features and functions WITHOUT affecting your existing Jim2 records.

To manually update a database you have restored simply run the current Jim2DBUpdate.exe. This file can be located in your Jim2 subdirectory after running the **Jim2Upgrade_v30_3124.exe** upgrade program.

****Note: If you are not running at least v2.18 you must upgrade to v2.18 prior to upgrading to v3.0. Please refer to previous release notes for more information.**

****Note: The latest Jim2DBUpdate.exe will upgrade any Jim2 database from v2.18 to the current version.**

Jim2 Server v3.0

Jim2 Server has updated to support Jim2 v3.0 build 3124.

Jim2 eBusiness Server (Jes)

Jim2 eBusiness Server has updated to support Jim2 v3.0 build 3124.

Jim2 eBusiness Framework (Jef)

Jim2 eBusiness Framework has updated to support Jim2 v3.0 build 3124.

Microsoft SQL Server

Jim2 fully supports all versions of Microsoft SQL Server from version 2000 onwards including:

SQL Server 2008 Enterprise Edition (both 32 and 64 bit versions)

SQL Server 2008 Standard Edition (both 32 and 64 bit versions)

SQL Server 2008 Workgroup Edition

SQL Server 2008 Express Edition

SQL Server 2005 Enterprise Edition (both 32 and 64 bit versions)

SQL Server 2005 Standard Edition (both 32 and 64 bit versions)

SQL Server 2005 Workgroup Edition

SQL Server 2005 Express Edition

Microsoft SQL Server 2000 (with service pack 2 or greater)

Microsoft MSDE 2000 (with service pack 4 or greater)

Microsoft SQL Server and Microsoft OS Important Notice

****Please also note that Microsoft SQL version 7 is no longer supported by Happen Business.**

****It is recommended to upgrade to at least Microsoft SQL 2005 or greater. Happen Business plans to drop support for SQL 2000 in upcoming versions.**

****It is recommended to upgrade workstations from Windows 2000. Happen Business plans to drop support for Windows 2000 in upcoming versions.**

Kind Regards, The Team at Happen Business.