

Jim2® Business Engine v3.1 release notes – 17/06/10

Welcome to Jim2 Version 3.1 - 'The Dashboard'

Jim2 version 3.1 introduces many new features and enhanced functionality. Most significantly, Jim2 v3.1 includes Management Dashboards, EFTPOS integration, improved Invoicing, Debtors/Creditor Contras, Auto Credit Hold, Reassign Users, multiple Barcodes, new 'Seven' skin, and more...

Dashboard

- Multiple dashboards based on users requirements
- Dashboard security (which users can see which Dashboards)
- Custom layout and design
- 'Widget' based (more can be added like reports)

EFTPOS integration

- Industry standard PC EFTPOS
- Works with most major EFTPOS machines and Banks
- Multiple machines can share the same EFTPOS terminal

Improved Invoicing features

- Cleaner interface design
- Apply multiple payments of the same type at the same time
- Kick Till (opening the till) can now be based on payment type
- New Invoice Layouts - better envelope folding, EFTPOS details, Machine details
- Now shows which till you are connected to
- Option - Auto send batch invoicing emails

CardFiles

- Reassign User

User Interface

- New 'Seven' skin
- Price TF/TP now consistent right through Jim2 - Price Inc., Price Ex. etc

Debtors/Creditors

- Contras

Debtors

- Auto Credit hold
- New Statement layout
- Aged Receivables report now handles Multicurrency

Return From Customer

- Return From Customer report now handles Multicurrency

Till Reconciliation

- Cash Count now displays on Till Rec report
- When paying a creditor by cash from unbanked funds, at a workstation linked to a till, you can now see the transaction in Till Rec

Now handles

- Cancelled Creditors cheques
- Cancelled Debtors cheques/payments
- Cancelled cheque book entries

Batch Invoicing

- New option to decide whether to auto send the email in batch invoicing

Items

- Rename Item, Make and Model



Stock Procurement

- Right click Export/print
- New 'Include Transfers From in Stock' usage calculation

General updates

- **Jobs** - The Status Due is now only recalculated if it hasn't been manually changed
- **Purchase Orders** - Now Unlinks Stock from PO when it is linked to Cancelled Jobs.
- **Stock** - Multiple barcodes (for units and same stock - different barcode)
- **Stock List** - Multiple barcodes
- **Stock Adjustments** - Now works with barcodes
- **End of Year Roll** - Now excludes PO's on Received outside the current FY roll
- **Import data** - CardFiles - Updated to handle new 'On Hold' features
- **Jim Search** - Multiple barcodes
- **Quote** - New Quote layouts

Grid printing and exporting

- New 'ribbon' for 'grid' printing
- Export to PDF

Jim2 Managed Print Services Edition

- Prepaid pages
- New page request method 'Text email'
- Price Revision filtering (in list and filter criteria)
- Meter name is now a lookup
- New macros
- Default Fault and Invoice descriptions
- Invoice total matching
- FINISH checkbox to project list
- Invert groups
- Billing - 2 yearly, 3 yearly
- Watchout on consumable Job
- Job - Item serial number now does not change if Job linked to a project (machine)
- New <LINKED COUNTERNAME> macro
- Phone number now displayed on Machine form if request by Phone
- Default Stock on a Machine now included in Related Stock on Stock Select.
- Auto login URL for eMeterReads

MPS Integration

- FM Audit (PrintSolv)
- Ricoh - @remote

Vendor feeds

- Ricoh utility
- Dicker Data
- Dynamic Supplies
- Edsys
- Generic Text (CSV)
- Generic XML

Jim2 Managed Services Edition

- Default Fault and Invoice descriptions
- FINISH checkbox to project list
- Invert groups
- Billing - 2 yearly, 3 yearly

Jim2 eBusiness Service with Kaseya

- Adding the ability to assign a contract to a Kaseya created job.
- Ability to have only Ship selected, the customer looked up from ship.

General Updates

- New Security, Options and Reports

Jim2 eBusiness Framework (the Happen Business Web Framework for building Jim2 based applications)

- New dynamic page layout feature
- New blogs feature

Jim2 Upgrade

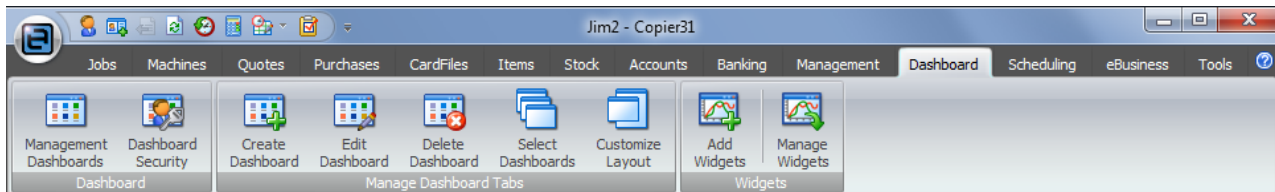
- Upgrade now checks it can upgrade all files before unpacking
- SQL version - Now requires MS SQL 2005 or greater

Welcome to all of our new Jim2 Users!

These release notes should provide some insight into the sort of changes that are introduced during version upgrades, and how YOU can take advantage of them at your site. With easy to follow screen shots, look through each one carefully to see how you can get the most of the new version of Jim2 Business Engine.

Features and Enhancements - All Editions

Dashboard - New Feature



Dashboard Tab in Jim2 v3.1 (black skin)

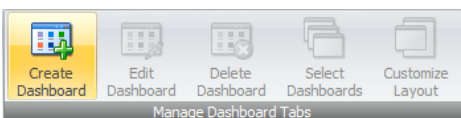
The new Jim2 Management Dashboard displays **Management information** and **Key Performance Indicators** for all areas of your business. This includes General Ledger financial information with comparisons, Debtors and Creditors balances, and all areas of your business workflow status. This information is displayed on Dashboard Tabs (Accounts, Service, Sales etc) using specific Dashboard Widgets.

Viewing the Dashboard



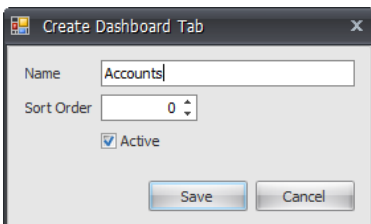
To view the Dashboard, click Dashboard on the Ribbon and then click Management Dashboards (**Dashboard > Management Dashboards**). The Dashboard will then be displayed. Notice that the Dashboard now also appears in your Navigation Tree. The first time you view the Dashboard it will be blank, that is, no Dashboard Tabs have yet been created.

Dashboard Tabs



To create a new Dashboard Tab click **Dashboard > Create Dashboard**. Type in a name for your new Dashboard Tab and click **Save**. In this example, a new 'Accounts' Dashboard Tab will be created.

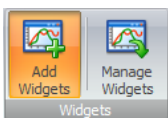
You can create as many Dashboard Tabs as you wish, and on each Tab add multiple Widgets, each configured to view specific areas of your business.



To edit the current Dashboard Tab, click **Dashboard > Edit Dashboard**. You can then rename your Dashboard Tab and change its display order within the Dashboard.

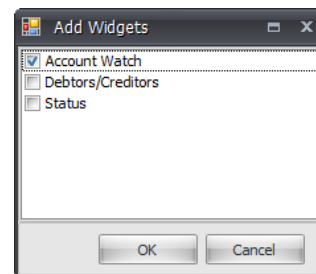
To delete the current Dashboard Tab, click **Dashboard > Delete Dashboard**.

Dashboard Widgets



Widgets are used to display information within a Dashboard Tab. Each Widget is designed to display a specific type of information and is then configured as to exactly what information from that area you wish to display. For example, using the Account Watch widget, display this year's profit vs last year's, or my current Stock on Hand vs the same period last year.

To add a Widget to the current Dashboard Tab, click **Dashboard > Add Widgets**. Tick 'Account Watch' and click **OK** to add an Account Watch Widget to your dashboard. A new Account Watch widget will then be displayed. Click on the Widget's 'Configure' button to configure your Widget (see Widgets below).



You can add as many Widgets as you like to a Dashboard Tab, including the same Widget multiple times. For example, several 'Account Watch' Widgets configured to look at different areas of your financial information.

Jim2 v3.1 ships with three standard 'system' Widgets.

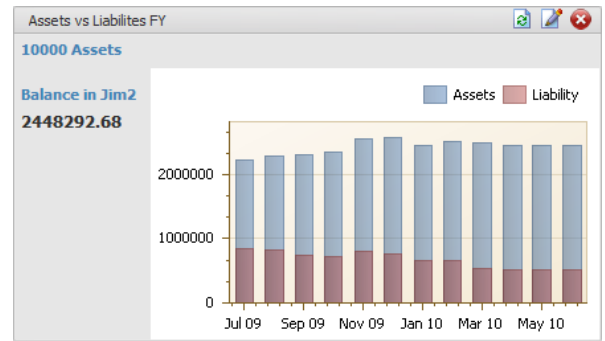
- Account Watch
- Debtors/Creditors
- Status

Widgets are stored in your Jim2 database and additional Widgets can be imported as they become available, much like reports.

Account Watch Widget

The Account Watch Widget allows you to view all areas of your financial (General Ledger) information. It can be configured to display in graph format any account within your general ledger including headers and 'computed' accounts such as Gross Profit, Net Profit and Operating Profit over a given period. Periods include Last X days, This Month, Last Month, This Year, Last Year etc. It can then be grouped to display Daily, Weekly, Monthly or Quarterly, and compared to the same or a different account over the same or a previous period.

An extremely powerful feature of the Account Watch Widget is the MAT function. MAT stands for 'Moving Average Total'. When looking at a year of information this is also known as 'Moving Annual Total'.



What to look at?

You can add and configure multiple Account Watch Widgets to see your entire financial position, along with trends. It is suggested you configure several Dashboard Tabs to cover the various financial aspects of your business.

Where is this information coming from?

All data displayed in the Account Watch Widget comes directly from your accounts transaction journal. Any information within the widget can be compared directly to information displayed within your Profit & Loss and Balance sheet. Any General Ledger account, including headers and computed accounts such as Net Profit, can be selected and displayed.

Some suggestions:

Sales and Profit

Try comparing a Stock GL Group's Income account vs its COGS account. Or total Income (header account 4-0000) vs Expenses (header account 6-0000).

Profit and Loss

Compare your Gross Profit vs Net Profit, or your Net Profit this year compared to last.

Assets and Liabilities.

Try viewing your current bank balance, or your Cash Assets (all bank accounts and Unbanked funds), over a given period.

Keep an eye on your GST and tax liabilities.

Monitor your SOH (Stock on Hand) figures for this year vs same period last year.

Looking for Trends - MAT

Typically, when looking for trends, depending on your type of business, you would normally look at data over a year. In this case try setting the period to This Fin Year or Last X Days = 365.

The Moving Average Total (MAT) feature is particularly useful here. For example try displaying a Profit account and tick both Actual and MAT. Set Display to Monthly, the MAT period to, say 3, and tick MAT Avg.

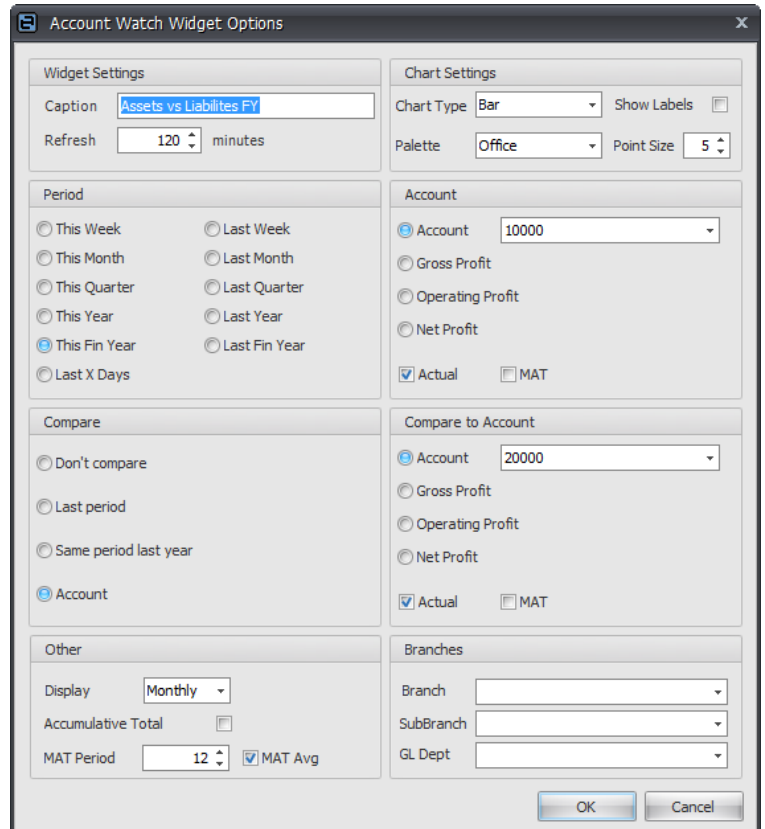
The widget will now show a year's worth of data, displayed Monthly, along with a 3 month MAT.

MAT is an extremely powerful method that looks for trends by smoothing out the highs and lows and displaying a rolling average. This makes it easier to compare especially performance to previous periods.

Chart Types and Palettes

Try changing chart types to match the type of data you are looking at. It's amazing how some data looks 'better' when displayed as an Area chart rather than a Bar chart, or vice versa.

Use palettes to make your Widgets more distinctive, 'Office' for P&L, and 'Nature' for Balance Sheet, for example.



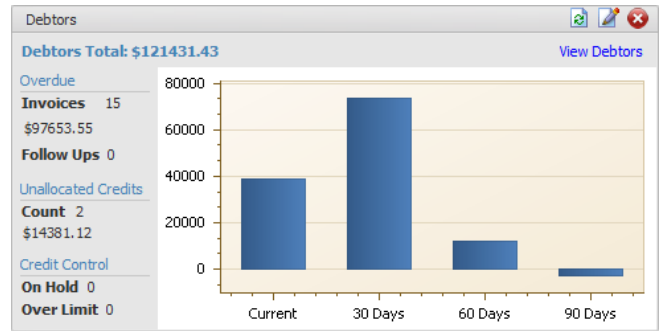
Account Watch Widget Options.

Group	Option	Description
Widget Settings	Caption	This is the caption that will be displayed at the top of the Widget Example: Stock On Hand - Current vs Last Year
	Refresh	The Widget's refresh interval in minutes Note: It is suggested not to set this too low (eg 15 minutes or higher)
Chart Settings	Chart Type	Select Bar, line or Area Chart
	Show Labels	Show \$ figure above each point of the chart Note: the label will be displayed as a hint when your mouse is over a graph point
	Palette	Select the palette (colours) that will be used in the graph
	Point Size	The size of graphs Points Default = 2. Try 8 or 10 on smaller graphs
Period	This Week	Period range for first series of data to be displayed Last X days allows you to view a number of days back from today. Example 30 to display the last 30 days, 365 for the last years, or 1095 for the last 3 years
	This Month	
	This Quarter	
	This Year	
	This Fin Year	
	Last X Days	
	Last Week	
	Last Month	
	Last Quarter	
	Last Year	
	Last Fin Year	
Account	Account	Display the selected General Ledger account as the graph's first series of data
	Gross Profit	Display Gross Profit as the graph's first series of data
	Net Profit	Display Net Profit as the graph's first series of data
	Operating Profit	Display Operating Profit as the graph's first series of data
	Actual	Tick to display the actual (real) account figures
	MAT	Tick to display the MAT (using MAT options below) account figures
Compare	Don't Compare	Display only the graphs first series of data
	Last Period	Compare to data from last period Example: If Period = This Month, comparison = Last Month
	Same Period Last Year	Compare to data from same period last year Example: If Period = This Month, comparison = Last Month
	Account	Compare to data from a different General Ledger Account
Compare to Account	Account	Compare against the selected General Ledger account
	Gross Profit	Compare against Gross Profit
	Net Profit	Compare against Net Profit
	Operating Profit	Compare against Operating Profit
	Actual	Tick to display the actual (real) account figures in the comparison
	MAT	Tick to display the MAT (using MAT options below) account figures in the comparison
Other	Display	Group and display data by selection. Daily, Weekly, Monthly or Quarterly
	Accumulative Total	Display data as an accumulative total Example: When displaying a P&L account, the data will start at zero and are added together for the period selected
	MAT Period	The number of periods used in MAT calculations. Example: When displayed by Months, 3 would be the total of the current month and the previous two months
	MAT Average	Display MAT as an average (rather than a total) In MAT period example $50 + 100 + 60 = 210$ and then $210 / 3 = 70$
Branches	Branch	Filter P&L account data by specific Branch
	SubBranch	Filter P&L account data by specific SubBranch
	GL Dept	Filter P&L account data by specific GL Dept

Debtors/Creditors Widget

The Debtors/Creditors Widget allows you to view the current state of either your Debtors or Creditors as a graph. Debtors/Creditors are grouped by Current, 30, 60 and 90+ days. The sum of your Debtors/Creditors is displayed along with the number and total of Overdue Invoices, follow ups, unallocated credits and accounts on hold or over limit.

The amounts outstanding (displayed as bars in the graph) can be drilled down on, that is you can click on for example, the 90 Days bar and a grid will appear listing the overdue Invoices. You can then right click to view that Debtor/Creditor within Jim2.



The screenshot shows the 'Debtors/Creditors Widget Options' dialog box. It is divided into several sections:

- Widget Settings:** Caption is set to 'Debtors', and Refresh is set to 30 minutes.
- Chart Settings:** Chart Type is 'Bar', Show Labels is checked, Palette is 'Office', and Point Size is 2.
- Account Type:** 'Debtors' is selected with a radio button.
- Aged By:** 'Invoice Date' is selected with a radio button.

Buttons for 'OK' and 'Cancel' are located at the bottom right.

Debtors/Creditors Widget Options.

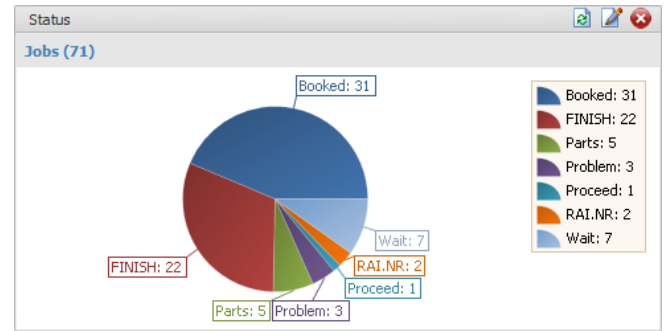
Group	Option	Description
Widget Settings	Caption	This is the caption that will be displayed at the top of the Widget Example: Stock On Hand - Current vs Last Year
	Refresh	The Widget's refresh interval in minutes Note: It is suggested not to set this too low (eg 15 minutes or higher)
Chart Settings	Chart Type	Only the Bar Chart type is available in this widget
	Show Labels	Show \$ figure above each point of the chart Note: the label will be displayed as a hint when your mouse is over a graph point
	Palette	Select the palette (colours) that will be used in the graph
	Point Size	The size of graphs Points Default = 2. Try 8 or 10 on smaller graphs
Account Type	Debtors	Display Debtors information
	Creditors	Display Creditors information
Aged By	Invoice Date	Aged by Invoice Date
	Due Date	Aged by Due Date

Status Widget

The Status Widget allows you view the current state of any Status driven object (Job, Purchase Order, Quote etc) grouped by Status.

The Widget's filter options will vary depending on which object you have selected.

The object will display as either a bar, line or Area chart grouped by Status. The Status Widget can be drilled down on, that is you can click on for example, Jobs on Parts, and a grid will appear listing these Jobs. You can then right click to view that Job within Jim2.



Status Widget Options.

Group	Option	Description
Widget Settings	Caption	This is the caption that will be displayed at the top of the Widget Example: Stock On Hand - Current vs Last Year
	Refresh	The Widget's refresh interval in minutes Note: It is suggested not to set this too low (eg 15 minutes or higher)
Chart Settings	Chart Type	Select Bar, line or Area Chart
	Show Labels	Show \$ figure above each point of the chart Note: the label will be displayed as a hint when your mouse is over a graph point
	Palette	Select the palette (colours) that will be used in the graph
	Point Size	The size of graphs Points Default = 2. Try 8 or 10 on smaller graphs
Filters	Object	Select Job, Quote, Purchase, Project, Return From Customer, Return To Vendor, Stock Transfer or Stock Adjustment. Note: the available filters will change based on the selected object.

What to look at?

The Status Widget lets you see the current state of your workflow within your business. For example, a Service Dashboard Tab may contain several Status Widgets looking at different areas of your service centre, all active service jobs, all Onsite Service Jobs, all urgent jobs, overdue jobs etc. You may also have Widgets for each technician level.

Currently Logged

Note the selection of (Logged) in the filter for Name# in the above example. This allows management to configure widgets so that the information displayed is relevant to the currently logged user or account manager.

Note: Please see the section on Dashboard Security for more information.

Dashboard Security

Dashboard security is of critical importance as the Dashboard can display confidential information, especially with regards to your business's financials. As such, some care must be used as to who in the company is allowed to create and manage Dashboards, and who is allowed to see which Dashboard Tabs.

Create and Manage Dashboards Security.

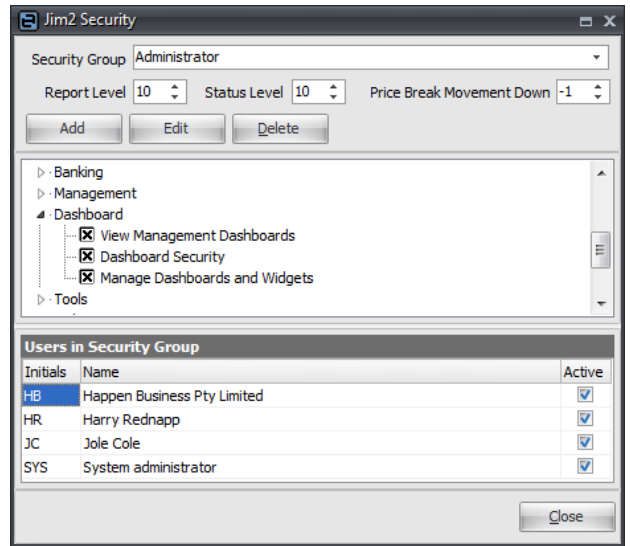
The creating and managing of Dashboards is generally by managers and owners, and is handled via Jim2's 'traditional' security. By default, only users with administration rights have this ability.

The following additional security settings have been added:

Tools > Security > Dashboard

- View Management Dashboards
- Dashboard Security
- Manage Dashboards and Widgets

By default, only the View Management Dashboards security setting is enabled.



Dashboard Security



Dashboard Security allows you to control which users can access which Dashboard Tabs. When you create a Dashboard Tab, by default, it is only visible to you. Then, via Dashboard Security, you select this Tab and then select which other users can view. The Tab will then automatically appear in their Dashboard when next viewed.

Basically, as management, you are creating various Dashboard Tabs based on specific areas of your business, and then via Dashboard Security, controlling who is allowed to view these dashboards.

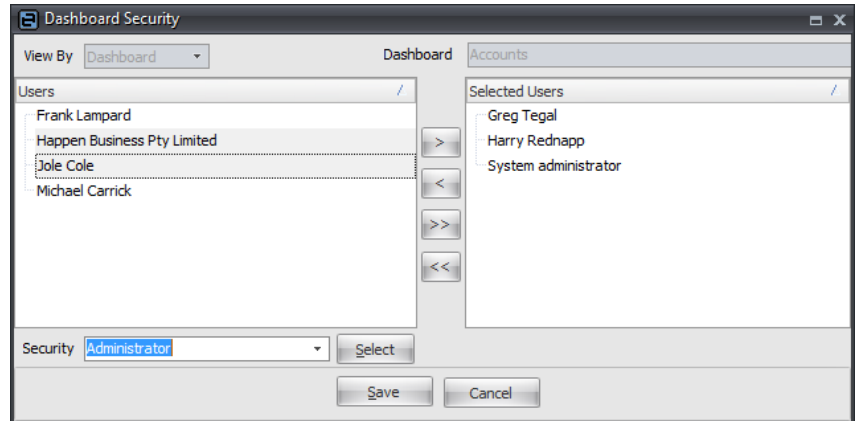
You can set Dashboard Security using the following two methods:

Dashboard by User:

This Dashboard Tab can be viewed by the selected users.

To enable other users to view specific Dashboard Tabs, click on **Dashboard > Dashboard Security**. The Dashboard screen will then open. Select view by '**Dashboard**' and select the Dashboard Tab you wish to allow other people to view. Click **Edit** and use the arrow buttons to move users across to the Selected Users panel. When finished, click **Save**.

To speed up the selection process assuming your Dashboard Security is loosely based on your Jim2 Security Level, you can select a security level and click Select. All users within this security level will then be automatically selected.

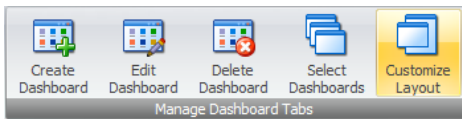


User by Dashboard:

This User can view the selected Dashboard Tabs.

To enable which users can view specific Dashboard Tabs click on **Dashboard > Dashboard Security**. The Dashboard screen will then open. Select view by '**User**' and select the user you wish to work with. Click **Edit** and use the arrow buttons to move Dashboards across to the Selected Dashboards panel. When finished click **Save**.

Dashboard Layout



By default, when adding Widgets to a Dashboard Tab, the Widgets will be created one beneath the other. Customize Layout allows you to move and resize widgets to suit your requirements, even add spaces and labels.

Select the Dashboard Tab you wish to customize and click **Dashboard > Customize Layout**. The Dashboard Tab will then enter 'layout' mode and the Customization form will then appear.

Resizing Widgets

To resize a Widget, first select the Widget by clicking on it. Then right click on the Widget and select '**Size Constraints**', and then select '**Free Sizing**'. You can now click and hold on the 'sides' of the Widget and resize as required.

Locking a Widgets size.

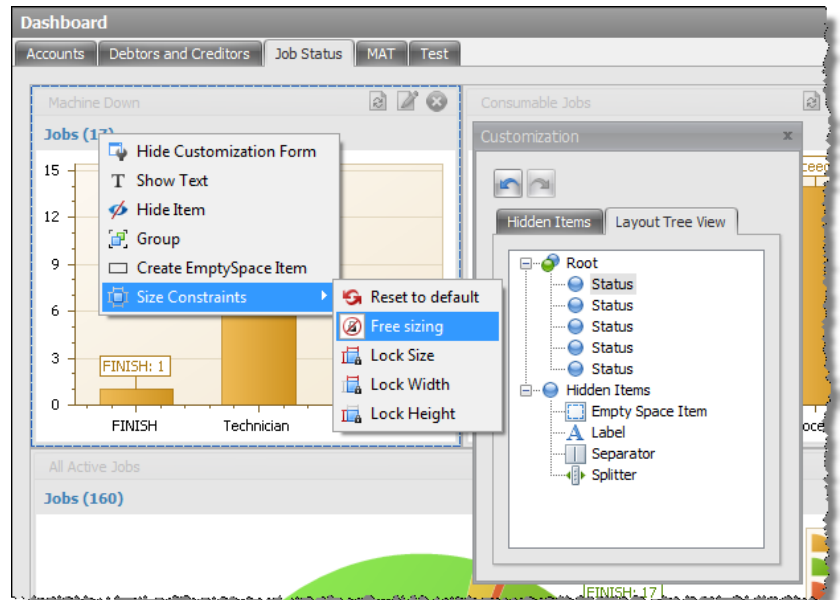
To lock a Widgets size to avoid it being resized, right click on the Widget and select '**Size Constraints**', and then select '**Lock Size**', '**Lock Width**' or '**Lock Height**'.

Moving Widgets.

To move a Widget simply click and, whilst holding the mouse button, drag the Widget to its new position. You'll notice that as you move the Widget around the Dashboard Tab, a line or box will appear indicating where the Widget will move to upon releasing the mouse button.

Adding Groups, Labels, Spaces and Splitters

As well as resizing and moving Widgets, you can also add Groups, Labels, Spaces and Splitters to your Dashboard Tab. You can do this by 'dragging' these items from the Customization Form onto your Dashboard Tab, or by right clicking on your Tab and selecting the appropriate item. Hide these items by dragging them into Customization Form's 'Hidden Items' tab.



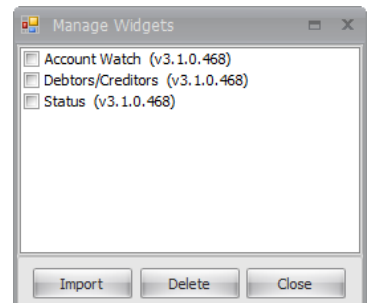
Finishing Customization

To finish customizing your Dashboard Tab, click the close 'X' button on the Customization Form, or right click on your Dashboard Tab and select '**Hide Customization Form**'.

Manage Dashboard Widgets

Dashboard Widgets are stored within your Jim2 database, and are loaded and displayed automatically when opening the Dashboard. Manage Widgets allows you to manually load new or custom created Widgets, or delete existing Widgets.

Note: Jim2 Updates will automatically import new widgets and update existing ones.



EFTPOS Integration - New Retail feature

EFTPOS integration allows Jim2 to communicate directly with your EFTPOS machine, greatly improving card processing time, and reducing errors by eliminating any manual re-keying.

Jim2's EFTPOS integration works with most major banks and EFTPOS machines by using the industry standard PC EFTPOS software. The PC EFTPOS software is available freely directly from the PC EFTPOS website. The installation and setup of a suitable EFTPOS machine should be done directly via your existing bank.

Payment types within Jim2 are flagged as EFTPOS related. The workstation is then configured via options to communicate with Jim2 EFTPOS Server, an application that is installed on the workstation that has the EFTPOS machine attached. Multiple workstations can do EFTPOS transactions via the EFTPOS server allowing them to share a common EFTPOS machine. All EFTPOS payment related transactions including Invoice and Debtors payments, and Debtors refunds are then processed directly from within Jim2. The EFTPOS payment details are printed directly onto your customers invoice.



Installation and setup of Jim2 EFTPOS

Steps to install and setup Jim2 EFTPOS:

- Contact your bank and organise a PC-EFTPOS compatible EFTPOS machine
- Download and install the PC-EFTPOS software
- Download and install the Jim2 EFTPOS Server
- Configure Retail & EFTPOS options
- Configure Payment Types as EFTPOS

Contact your Bank

Contact your bank and organise a PC-EFTPOS compatible EFTPOS machine. Supported Banks include:

- Westpac
- ANZ
- Commonwealth
- NAB
- Suncorp
- St George
- BWA
- Travelex

For more information please refer directly to your bank or the PC EFTPOS web site www.pcEFTPOS.com

Install PC-EFTPOS

Your EFTPOS machine will typically be connected to a retail workstation. Some EFTPOS machines still use a RS232 serial connection so a USB to Serial converter may be required.

Once you have received your PC-EFTPOS compatible EFTPOS machine, download and install the PC EFTPOS software (www.pcEFTPOS.com) on this workstation.

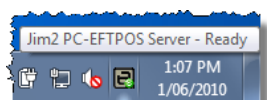
Install Jim2 EFTPOS Server

Download and install the Jim2 EFTPOS Server. The Jim2 EFTPOS Server is installed on the same workstation that the EFTPOS machine is physically connected to and the PC-EFTPOS software is installed on.

Once Jim2 EFTPOS Server is installed run the server (Jim2 EFTPOS Server.exe) normally located under:

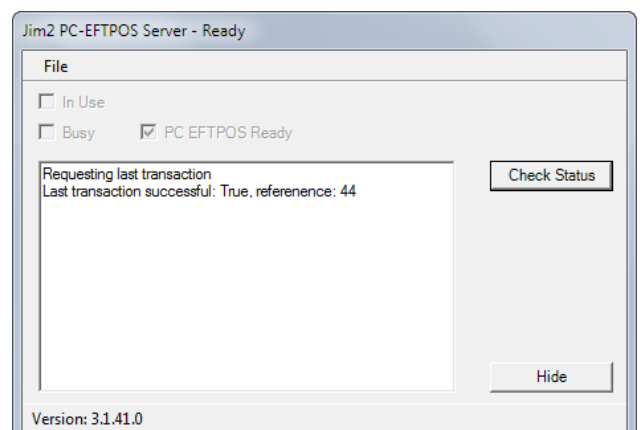
C:\Programs Files\Happen Business\Jim2 EFTPOS Server

The Jim2 EFTPOS Server will then appear in your Windows notification area, at the far right of the taskbar.



The icon display with a green \$ sign, indicating that the EFTPOS server is running and currently connected to the EFTPOS machine via PC-EFTPOS.

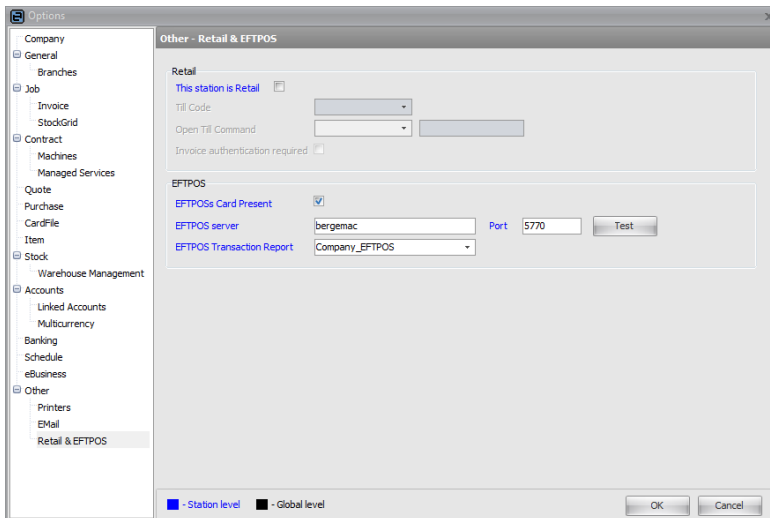
Right click on the EFTPOS server icon and click open to display the Jim2 EFTPOS Server.



Configure Retail and EFTPOS options

On each workstation that you wish to share your EFTPOS machine with, including the workstation that the EFTPOS machine is connected to, the next step is to setup your Retail & EFTPOS options.

From the Jim2 client click **Tools > Options > Other > Retail and EFTPOS**.



Set the following EFTPOS options as required:

EFTPOS Option	Description
EFTPOS Card Present	Indicates that the EFTPOS transactions are normally 'Card Present' Default = ticked
EFTPOS Server	The name of the workstation that Jim2 EFTPOS Server is running on localhost if running on same machine
Port	The port that Jim2 will use to communicate with Jim2 EFTPOS Server Default = 5770
EFTPOS Transaction Report	Report used to reprint last transaction. This report is located in Report Designer under the EFTPOS folder Default = Company_EFTPOS

Once you have set your EFTPOS options click the Test button to check that Jim2 can talk to the Jim2 EFTPOS Server.

Note: All EFTPOS options are Workstation Level, that is you will need to configure these options on all workstations that you wish to use EFTPOS.

Configure EFTPOS Payment Types

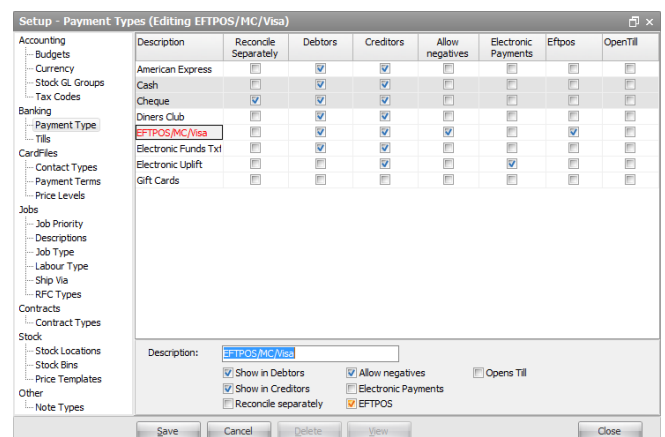
The final step in setting up Jim2 EFTPOS involves selecting which payment types you wish to process via EFTPOS.

From the Jim2 client click **Tools > Setups > Banking > Payment Types**.

Click on the payment type you wish to process via EFTPOS and click **Edit**. Next tick the EFTPOS tickbox and click **Save**.

Typically you would setup a separate payment type for each EFTPOS payment type your business handles; AMEX, VISA/MC/EFTPOS, DINNERS etc.

Note: It is suggested to also setup a 'Manual EFTPOS' payment type to handle EFTPOS payments when the EFTPOS machine is down and the payment needs to be processed by hand using your swipe machine.



Using EFTPOS in Jim2

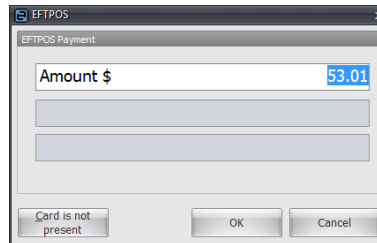
Using EFTPOS within Jim2 is quite straightforward. Process a payment as normal, that is, any payment transaction from the invoicing screen or from Debtors (including refunds) using a payment type that is flagged as EFTPOS. The EFTPOS form will then appear.

Card Present Transaction

For a card present transaction follow these steps:

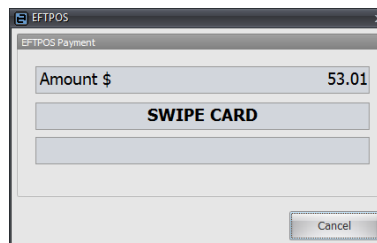
Step 1.

Confirm Amount and click **OK**



Step 2.

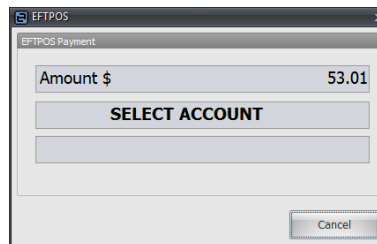
Ask customer to swipe their card



Step 3.

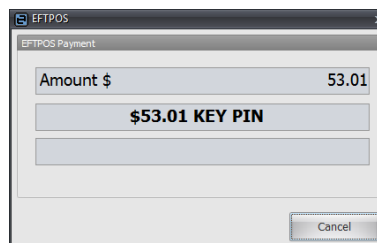
Ask customer to select account

Cheque, Savings or Credit



Step 4.

Ask customer to key their PIN or ENTER to sign



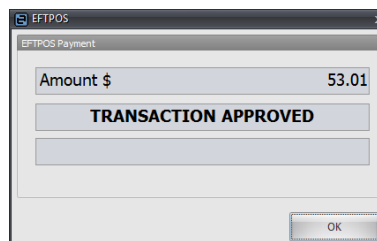
Step 5.

If 'sign' confirm signature matches card and click **Yes**



Step 6.

Transaction approved



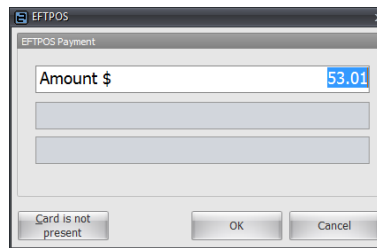
Card NOT Present Transaction

For a card not present transaction follow these steps:

Step 1.

Confirm Amount

Click **Card is not present** (see options)

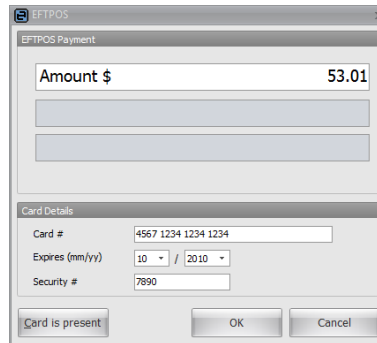


The screenshot shows the 'EFTPOS Payment' dialog box. The 'Amount \$' field contains the value '53.01'. Below the amount field are two empty input fields. At the bottom, there are three buttons: 'Card is not present', 'OK', and 'Cancel'. The 'Card is not present' button is highlighted with a blue border.

Step 2.

Enter card details

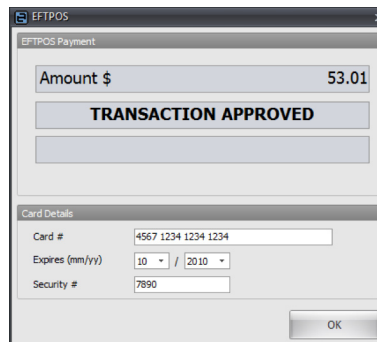
Click **OK**



The screenshot shows the 'EFTPOS Payment' dialog box. The 'Amount \$' field contains the value '53.01'. Below the amount field are two empty input fields. The 'Card Details' section is expanded, showing the following fields: 'Card #' with the value '4567 1234 1234 1234', 'Expires (mm/yy)' with the value '10 / 2010', and 'Security #' with the value '7890'. At the bottom, there are three buttons: 'Card is present', 'OK', and 'Cancel'. The 'Card is present' button is highlighted with a blue border.

Step 3.

Transaction approved



The screenshot shows the 'EFTPOS Payment' dialog box. The 'Amount \$' field contains the value '53.01'. In the center of the dialog box, the text 'TRANSACTION APPROVED' is displayed in a large, bold font. Below this text are two empty input fields. The 'Card Details' section is expanded, showing the same fields as in the previous screenshot. At the bottom, there is a single 'OK' button.

Payment details

When applying for an EFTPOS related payment to an Invoice the EFTPOS payments details will be printed on the bottom the customer's invoice. This applies for both A4 and 80mm receipt style Invoice reports.

Reprint an EFTPOS payment receipt

EFTPOS payment applied to Invoice.

- Simply reprint the Invoice as normal **Jobs > Sales Register > Print Invoice**

EFTPOS payment via Debtors

- Open the related Debtors and click on the payment you wish to reprint
- From the Report Toolbar select **Payment Receipt** or **Payment Receipt 80mm**
- Click Print

Note: It is an EFTPOS requirement that a record of the last EFTPOS transaction be reprinted in case of error, or due to power loss midway through a transaction etc. This report will be automatically reprinted by Jim2 as required, using the 'EFTPOS Transaction Report', as set in Options.

Improved Invoicing Features

Jim2 v3.1 includes several new Invoice related features including:

- New Invoice screen
- Apply multiple payments of the same type at the same time
- Now shows what Till you are connected to
- Kick Till draw based on payment type
- Batch Invoice by Cust Ref#
- Cancel batch Invoicing
- Auto send batch Invoicing emails
- New Invoice Layouts - better envelope folding, EFTPOS details, Machine details
- Payment details 'report region'

New Invoice screen

The Invoice form has been redesigned to better handle multiple payment types. All payment related information is now displayed under the Payments Tab. Each payment type, including 'Apply Credits' is now represented as a button. By clicking on a payment type button, the payment will automatically be added to the Payments list. You can then type over the amount received if required.

Note: Payments and EFTPOS transactions

Previously you could enter various payments via the invoicing form and click Cancel. It is important to note that if a payment was made using EFTPOS integration, the transaction HAS happened and the customers card has been billed. If you cancel invoicing at this point the customer will be in credit, and which can be then applied when next invoicing, or refunded as required.

Apply multiple payments of the same type at the same time

As part of the new EFTPOS integration the actual payment processing needs to occur whilst in the invoicing form. The invoicing payment process has changed to cater for this, as an added bonus you can now apply multiple payments of the same type when applying payments. This allows, for example, in the case of a \$1200 sale, the customer to put \$1000 on one VISA card, and \$200 on another.

Cash payments are handled slightly differently due to cash rounding, and so only one cash payment is allowed.

What Till am I connected to?

The Invoicing form now clearly displays what Till the workstation is connected to in the upper lefthand corner.

Kick Draw based on Payment Type

Individual Payment Types can be defined as 'Open Till'. The opening of the Till Draw is now based on what payments have been applied at point of Invoicing. If any Payment Type has been applied that is marked as 'Open Till' the till draw will open. Typically this would only be the 'Cash' payment type, but you also may wish to flag 'Cheque' as Open Till', if you put cheques in the till draw.

To configure 'Open Till' on Payment Types from the Jim2 client click **Tools > Setups > Banking > Payment Types**.

Click on the Payment Type you wish to open the till and click **Edit**. Next tick the 'Open Till' tickbox and click **Save**.

Batch Invoice by Cust Ref#

Batch Invoicing can now group Jobs to be invoiced by Cust Ref#. This is useful when you have a customer who wishes to have his Invoices batched by their order number.

To enable batch invoicing by Cust Ref#, edit the Customer's CardFile and click on the 'Customer' tab, then from the '**Batch Inv. Group By**' groupbox select '**Customer Ref#**'.

Whenever this Customer is then batch invoiced their Jobs will be invoiced in batches grouped by the Job's Cust Ref#.

Cancel Batch Invoicing

When invoicing a batch of Jobs a new '**Cancel All**' button will appear. Clicking '**Cancel All**' will cancel batch invoicing and return you to your Job List. Clicking the 'Cancel' button will cancel the current Invoice and skip to the next one in the batch.

The screenshot shows the 'Editing CardFile - BRACKEN.PR' window. The 'CardFile' section includes fields for Card Code (BRACKEN.PR), A.B.N., and Contact (Adrian West). The 'Name' is Bracken Commercial Printing, and the 'Address' is 64 Bunbury Road, Perth, WA 6000, Australia. The 'Batch Inv. Group by' dropdown menu is open, showing options: Customer, Ship, Project, Customer Ref#, and Don't Group. The 'Customer Ref#' option is selected.

Auto Send Batch Invoicing email

This new option allows you to select if you wish to automatically send the Invoice via email when batch invoicing.

From the Jim2 client click **Tools > Options > Job > Invoice** and tick '**Auto send batch Invoicing emails**' as required.

New Invoice Layouts

All Invoice related reports have been redesigned to allow for:

- Better alignment of Name and Address for windowed envelopes.
- Display of Payment details, including EFTPOS details on Invoice summary.
- 'Invoice ServiceSale - Machine' report has been renamed 'InvoiceMeter'

Note: Existing Invoice reports will be automatically renamed as XXXX (Old)

Invoice Payment Details 'report region'

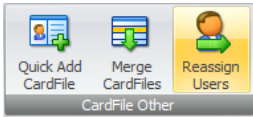
Invoice Payment Details are now 'embedded' into Invoice reports, much like Company Logo, and appears at the bottom of the invoice if there are any credits applied. If it is an EFTPOS related payment type, the EFTPOS receipt in the payments comments section.

The Invoice Payments Report is stored in the 'EFTPOS Reports' folder and is called 'Company_Payments'. If you wish to make a custom version of the Invoice Payment Details report you will need to make a copy of the report, and add in a JimVar called 'InvoicePaymentsReport', with the name of the new report

The following Global Variables are used for adjusting the position of the payments region if required:

- InvoicePaymentsLeft
- InvoicePaymentsWidth
- InvoicePaymentsTop
- InvoicePaymentsLandscapeLeft
- InvoicePaymentsLandscapeWidth
- InvoicePaymentsLandscapeTop

CardFile - Reassign Users



The new CardFiles Reassign Users feature allows you to reassign Jobs, Quotes, Items and Tasks from User to another. This can be for a specific date range, for example when a User goes on holidays or is sick for an extended period, or from today forward in the case where a staff member leaves.

To reassign a User click **CardFiles > Reassign Users**.

Select '**From User**' and enter the User you wish to assign from.

Optionally select the default '**To User**' and enter the User you wish to assign to.

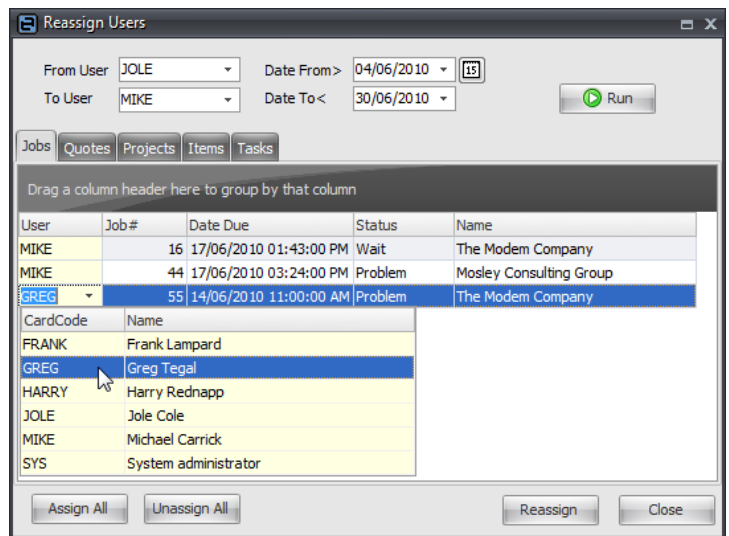
Enter the '**From Date/Date To**' date range, or for today forward select only a '**Date From**' date.

Click **Run**.

A list of related Jobs, Quotes, Projects (Machines), Items and Tasks will then appear under their respective tabs.

In the User column select the User you wish to reassign to. Leave empty if you do not wish to reassign.

When finished click the **Reassign** button.



Note: Reassigning tasks is slightly complex when it comes to recurring and Managed Service tasks. Reassign Users will automatically handle this situation and split recurring tasks for the given date range as required.

Debtors and Creditors Contras

The new Debtors/Creditors contra feature make it easy to handle 'swapping' multiple Debtor Invoices across to Creditors as a Credit, and the reverse, swapping Creditors Invoices (Purchase Orders) across to Debtors as a Credit.

In either case, once the Credit has been created, it can be applied as payment to outstanding Invoices as required.

Why would you use Contras?

It is often the case where you both buy and sell to the same CardFile, where the CardFile is set as both a Customer and a Vendor. Previously you had to contra Invoices by doing a separate Debtors/Creditors Adjust Up/Down for each invoice you wanted to transfer. With Contras you simply indicate with Invoices you wish to transfer and contra them in one process.

It is up to you as to if you do a Creditors Contra from Debtors, or a Debtors Contra from Creditors, but as a general rule it depends as to which side you wish to create the Credit.

How to do a Contra?

Contras work the same from both Debtors and Creditors.

This example is from Debtors to Creditors, doing a 'Payment By' Creditors Contra.

Edit the Debtor

Select '**Payment By**' and select '**Creditors Contra**' from the drop down list.

Enter or click off the amounts against the Invoices as normal.

Click **Save**.

The Invoices will be then marked as paid and a corresponding Credit will be created in Creditors. This credit can then be applied against Purchase Orders in Creditors as normal.

Reversing a Contra

You can reverse or delete (depending on Options) a Contra Payment much the same as any other payment, that is, in the case of a Creditors Contra from Debtors, locate the Creditors Contra from the payments tab of the Debtors, and click Unallocate. Any applied payments will then be unallocated, and then click Reverse or Delete. Keep in mind that if the corresponding credit created in Creditors is allocated, you will need to unallocate these from Creditors first.

New Contra Transaction Journal Types

From an accounting point of view, one of two new Transaction Journal entries will be created when doing a Contra.

Journal Type	Description
D2C	Generated when doing a Creditors Contra from Debtors
C2D	Generated when doing a Debtors Contra from Creditors

Both D2C and C2D journal types simply offset Debtors to Creditors as required.

Editing Debtor - DAYCOM

Card Code: DAYCOM Date: 06/06/2010 Type: Creditors Contra

Daycom Electronics Pty Limited
Unit 54, 224 Perth Street
Brisbane QLD 4000

Two Thousand, Two Hundred and Seventy Five Dollars only Amount: 2275.00

Comment:

Invoice #	Date	Invoice Amt	Paid Amt	Discount	Account Fee Discount	Paid Now	Balance Due	Date Due	Paid
18	15/07/2008	2275.00	0.00			2275.00	0.00	05/08/2008	
27	30/04/2010	73317.20	0.00				73317.20	21/05/2010	
28	30/03/2010	12255.10	0.00				12255.10	20/04/2010	

Debtors - Auto Credit Hold

Auto Credit hold is a great new feature that will automatically put customers (Debtors) on credit hold if they have invoices that are overdue by a certain number of days. You can select a CardFile level as to if that Customer is 'Auto Hold', or manually on/off hold.

Setting up Auto Credit Hold

To enable Auto Credit Hold it must first be enabled via Options.

From the Jim2 client click **Tools > Options > Accounts**

Tick '**Enable automatic daily credit hold check**'

Select '**When outside terms by (Days)**' and enter your 'grace' period or zero.

When changing these options, and at the start of each day, Jim2 will automatically check each Debtor and place them on Auto Hold if required.

Adjusting a Customer's credit hold status

By default all Customers are set to 'Auto Off' credit hold. After setting the Credit Hold options as above, credit hold checking is then enabled.

To change a CardFile's credit hold setting, edit their CardFile, and on the Customer tab set their credit hold status as follows:

CardFile Credit hold settings:

Credit Hold	Description
Off (Auto)	The customer is currently not on credit hold. If overdue they will be automatically put on credit hold 'On (Auto)'
On (Auto)	The customer has been placed on automatic credit hold. They will return to 'Auto (Off)' when payment is made
Off (Manual)	The customer is OFF credit hold and is not affected by auto credit hold checking
On (Manual)	The customer is ON credit hold and is not affected by auto credit hold checking

The 'Manual' credit hold settings exclude customers from automatic credit hold checks.

For example, you may wish to place a Customer on '**On (Manual)**' if you are currently in dispute with them, or they are in receivership etc.

You may place a 'good' customer, or a customer who always pays but simply not within your terms (local school for example), on to '**Off (Manual)**' credit hold status.

What happens when I receive payments?

When a payment is received Jim2 will automatically check the Debtor and update their auto credit status as required.

Debtors List - How do I know who's on Auto Hold?

By running a Debtors list you can check which Debtors are on Credit Hold. Debtors List has been updated to allow filtering by credit hold.

From Debtors List select which 'type' of credit hold and click Run.

Credit Hold filter	Description
Off (Auto)	Debtors OFF auto credit hold
On (Auto)	Debtors ON auto credit hold
Off (Manual)	Debtors OFF manual credit hold
On (Manual)	Debtors ON manual credit hold
ALL ON	Debtors ON either auto or manual credit hold
ALL OFF	Debtors OFF either auto or manual credit hold
ALL	All debtors regardless of their credit hold status (default)

Till Reconciliation

Cash Count

Till Reconciliation now saves the actual cash count figures (5x \$100, 7x \$50 etc) and prints them in the Till Session reports.

Creditors payments via Unbanked funds

Creditors payments made via Unbanked funds via a workstation connected to a Till now appear when doing a Till Reconciliation.

Cancelled payments

Till Reconciliation has been updated and now displays and handles:

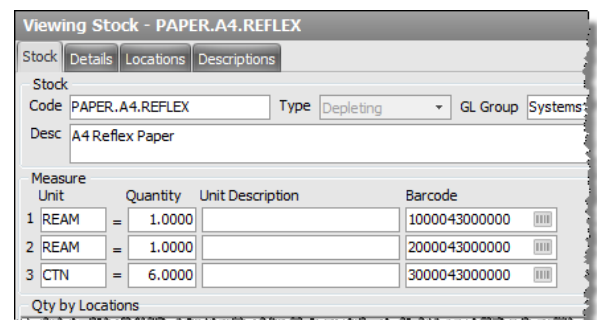
- Cancelled Creditor cheques
- Cancelled Debtors cheques and payments
- Cancelled Cheque Book entries

Stock - Multiple Barcodes

Stock has been updated and now has the ability to handle multiple barcodes for the same product. Barcodes are also related to a unit of measure, and can be based on single or multiple unit measures.

All areas of Jim2 that allow scanning and searching of barcodes has been updated to handle multiple barcodes. When scanning a barcode that is related to a different unit measure, the unit of measure will be automatically updated.

In the example above scanning the REAM barcode will add a ream of paper, whilst scanning the BOX barcode will add a box of paper.



Stock - Price Rounding

Stock price rounding has been updated. Previously stock price rounding only handled rounding to fifty cents, and did not handle 'retailer' type price rounding to \$0.95 as you would expect.

Now, if the rounding is set to a value greater than \$0.51 cents, the price will calculate to a \$1 more PLUS the rounding value.

Examples:

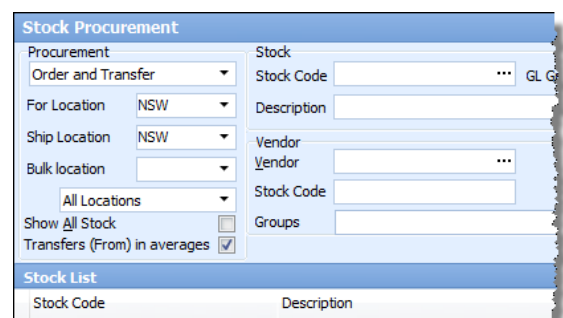
Rounding Value	Actual Price	Rounded Price
0.25	\$5.12	\$5.25
0.25	\$5.78	\$6.00
.95	\$5.12	\$5.95
.95	\$5.67	\$5.95
.95	\$5.96	\$6.95

Stock Procurement updates

Stock Procurement has been enhanced in Jim2 v3.1 and allows for the inclusion of 'Transfers From' in the stock usage calculation. This allows companies that have a centralised warehouse to include not only what has been sold from this location, but also what has been transferred from this location, to be used when Stock Procurement is calculating your stock usage.

When calculating your stock usage, Stock Procurement works out how much stock you have used over a certain amount of time (based on the Stock's Procurement Settings) and calculates a daily average. By ticking '**Transfers (From) in averages**' in Stock Procurement, any Stock Transfers from (out of) this location are included in this calculation.

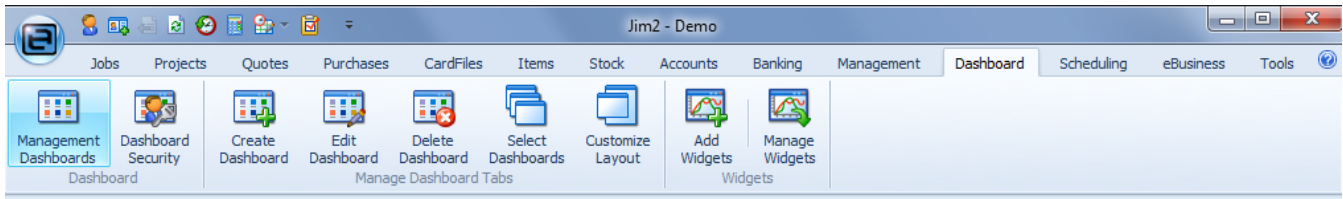
You can now right click on the Stock Procurement grid and select Export (to Excel), Print, Print Preview etc.



User Interface updates

Jim2 v3.1 includes many user interface changes including:

'Seven' skin



Jim2 v3.1 includes a brand new 'Seven' skin. This skin provides Jim2 with an updated 'Windows Seven' look.

From the Jim2 client click **Tools > Options > General** and under Database Colours select '**Seven**' as your Main database skin.

Tax Pricing change

The description of all tax related pricing is now consistent throughout Jim2. All TF/TP references now display '**Price Inc.**', '**Price Ex.**' etc.

Qty Pick	Price Ex.	Price Inc.	Tax	Total
	439.09	483.00	G	483.00

Rename Item, Make and Models

Items in Jim2 can have different meaning depending on how you use Jim2 within your business, and what type of business you are. As such, the term 'Item' can now be renamed.

It may be best to recap what an Item is: An Item is a template that defines the rules, layout and nature of Jobs, Quotes and Projects.

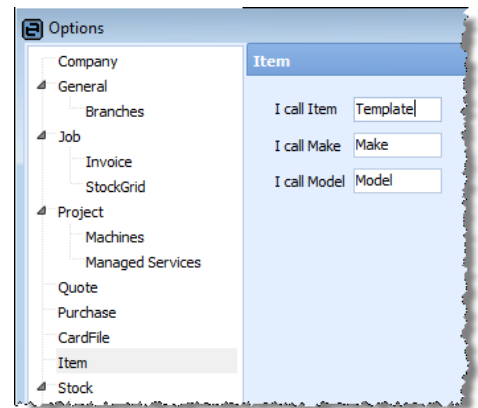
An Item in a Job, Project or Quote interacts with the Stock, and can be assigned as the responsibility of a Single or Multiple User/s. The Item describes what is to be serviced in a Service Job, what is to be Manufactured in a Manufacturing Job and describes what sort of Sales Job is to be executed.

Be careful not to confuse STOCK with ITEMS. If you can identify an item as applicable to both SALES and SERVICE Jobs, you should add that item as a SALES ITEM and a SERVICE ITEM.

Suggested replacements include 'Template', 'Case' etc.

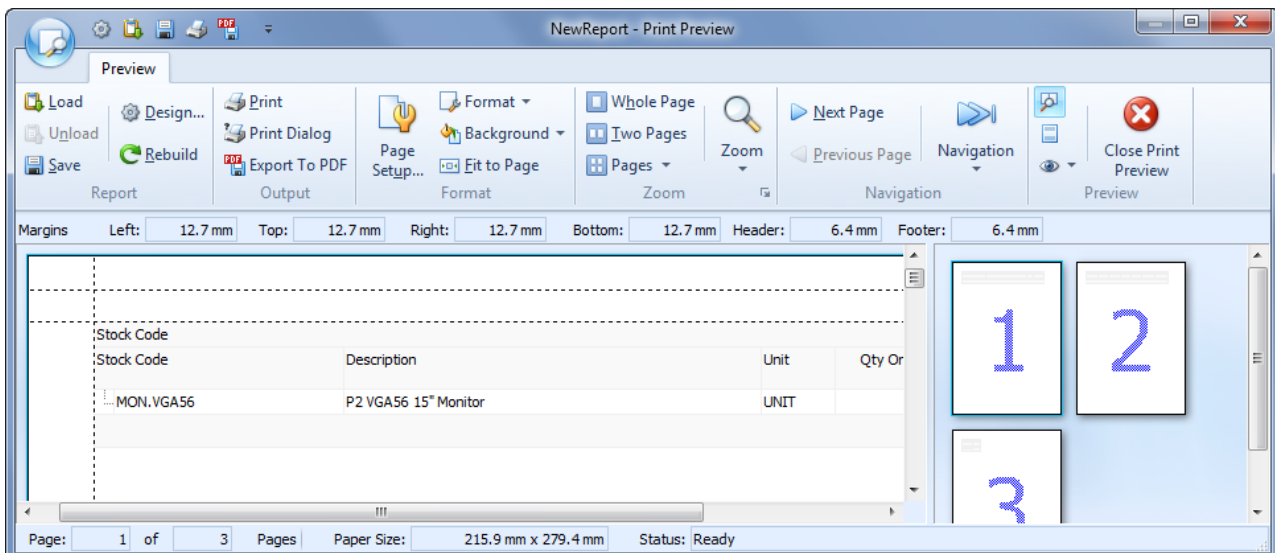
To rename Item from the Jim2 client click **Tools > Options > Items** and select '**I call Item**', and enter your new name for Item.

You can also rename an Item's Make and Model.



Grid Printing and Exporting

Grid printing and exporting has seen several enhancements including a new 'Ribbon' interface and exporting directly to PDF.



General updates

- **Jobs** - The Status Due is now only recalculated if it hasn't be manually changed
- **Purchase Orders** - Now Unlinks Stock from PO when it is linked to Cancelled Jobs.
- **Stock** - Multiple barcodes (for units and same stock - different barcode)
- **Stock List** - Multi barcode support
- **Stock Adjustments** - Multi barcode support
- **End of Year Roll** - Now excludes PO's on Received outside the current FY roll
- **Import Data** - CardFiles - Updated to handle new 'On Hold' features
- **Jim Search** - Multi barcode support
- **Quote** - New Quote layouts
- **Reports** - Project related reports now have their own report folder (based on Jim2 Edition)

Features and Enhancements :

Jim2 Managed Print Services Edition (MPS)

Machines - Prepaid Pages

Prepaid pages is a new meter machine billing type that allows you to invoice prepaid pages in advance, and keep track of their usage. You can set a time limit on a block of prepaid pages, and Jim2 will automatically bill a new block of pages as required.

Setting up Prepaid Pages Billing

Prepaid Pages is configured via a new meter type in the Meter Setups tab of Machines. It is configured in much the same way as other linked meter types, such as 2nd Party Billing.

- On a Machine, add a new linked meter of type '**Prepaid Pages**'
- Select the **Billing Stock Code** to be used for the actual billing of the Prepaid Pages (see below)
- Enter the number of Prepaid Pages that is normally billed in the '**Prepaid Bulk Pages**' column
- Enter the expiry date for the current block of Prepaid Pages in the '**Next Expire Date**' column.
- Link this meter to the related black or colour meter.

Note: Start Meter Read on a Prepaid Meter is the count when you next want to bill the prepaid block to begin.

How Prepaid Pages are billed

The billing stock for Prepaid Pages must be a 'Journal' stock type. When required, a 'block' of prepaid pages will be added to a billing Job as a 'positive' amount. As pages are billed against this machine, the prepaid pages are reduced as a 'negative' amount, thus in conjunction with the pages expiry date, keeping track of the prepaid pages usage.

As prepaid pages are billed in advance, it is suggested that the Journal Stock used be linked to its own Stock GL Group. This way you can keep track of your current 'prepaid page' liability.

When creating the Stock Code to be used on the 3rd party Purchase Order, it is useful to use stock description 'macros' so that the 3rd party can see the Machine's details.

Machines - Text eMail request method

You can now send page count (meter read) requests via a text email. This is useful for your customers that like to add the page counts to the email text and send it back as an email reply.

To enable a request via a text based email, edit the Machine and select '**Request via**', and select '**Text Email**' from the dropdown list.

The actual email text is set in **Options > Machine > Machines**. Edited options and set the text in the '**Request By: Text Email**' memo field.

Machines - Auto Login for eBusiness Meter Reads

When using Jim2 eBusiness Meter Reads you can now send an meter read request that includes an auto login URL. That is, by clicking on the auto login URL link, your customer is automatically logged into Jim2 eBusiness Meter Reads, and can start entering their counts.

To enable auto login eBusiness Meter Reads, edit the Machine and select '**Request via**', and select '**Web Email**' from the dropdown list.

The actual email text is set in **Options > Machine > Machines**. Edited options and set the text in the '**Request By: Web Email**' memo field. Make sure to include the <WEBSITEWITHLOGIN> macro to this text.

Machines - Invoice Total 'Balancing'

In cases where a vendor is handling the reading and/or billing of a machine, it is often difficult to 'exactly' match the total on the supplied paperwork. This is because Jim2 precisely calculates the billing of pages and people that do not use Jim2 basically don't! Often the difference is just a few cents, but sometimes much more. Machine billing now allows you to enter the Invoice figure you need to match on the meter billing form, and will add a 'rounding' up/down figure to the billing job to 'make' the figures match.

Setting up Invoice Total Balancing

Invoice Total Matching is configured via a new meter type in the Meter Setups tab of Machines.

- On a Machine, add a new type of meter '**Balancing**'
- Select the **Billing Stock Code** to the StockCode to be used for balancing (see below)

The billing stock for 'Balancing' must be a 'Journal' stock type. It is recommended that the Journal Stock used be linked to its own Stock GL Group. This way you can keep track of your 'balancing' figure.

Machines - Default Stock displayed in Stock Select

Stock added to a Machine's Default Stock tab is now displayed along with its Related Stock on the Stock Selection form.

This allows you for example, to add consumables like staples etc required for that specific machine to the Machine's Default Stock tab. When adding a Consumable Job the staples will be displayed, along with toner, drums etc.

Machines - Default Billing Job Invoice/Fault Description

Machines now allow a default Invoice and/or Fault description when generating Billing Jobs.

The default text is set in **Options > Machine > Machines**.

Edited options and set the text in the '**Default Billing Job Description**' memo fields.

A list of available macros is displayed in the text box to the right of these fields.

Managed Print Services - General Updates

The following is a list of other enhancements and updates to the Jim2 MPS Edition:

Area	Feature	Description
Machine	Meter Setups	Meter name is now a lookup
Machine	Billing	Now supports billed 2 yearly and 3 yearly
Machine	Watchout	Now supports Watchouts when adding Consumable Jobs
Machine	Request Via	Now displays phone number if request by Phone
Job	Serial Number	Item serial number now does not change if Job is linked to a Project (Machine)
Machine List	Price Revision	Machine Lists now display a Machine's price revision date. A 'Price Revision' filter criteria has also been added.
Machine List	Finish	Machine List now include a 'FINISH' status tickbox
Machine List	Groups	Now supports 'inverting' Machine and Item group selection as per Job List (double click on label)

MPS Integration

MPS Integration allows Jim2 MPS Edition to completely automate meter read collection.

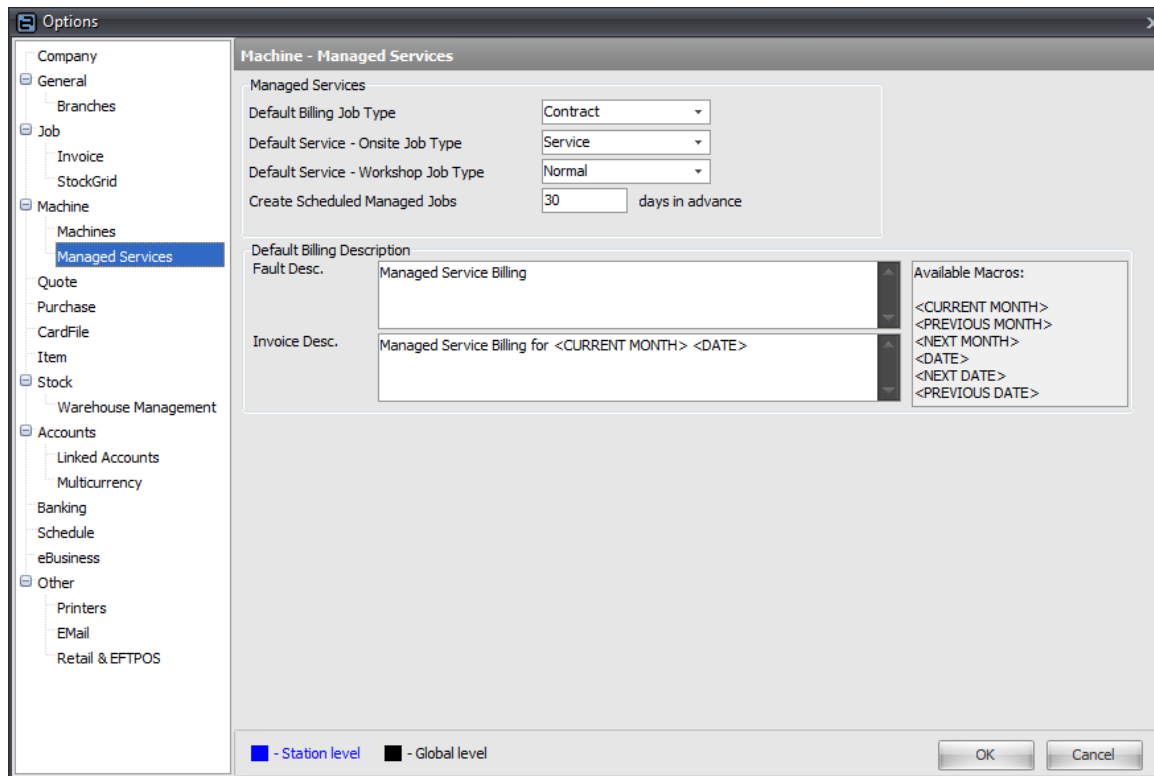
The following automated meter read formats are available, with many more either underway, or under consideration.

- FM Audit
- Ricoh @Remote
- Canon eBusiness Maintenance (beta)

Features and Enhancements: Jim2 Managed Services Edition

Jim2 Managed Services Edition has minor enhancements in v3.1 including:

Managed Services - Updated Options Screen



Managed Services - Default Billing Job Invoice/Fault Description

Projects now allow a default Invoice and/or Fault description when generating Billing Jobs.

The default text is set in **Options > Machine > Managed Services**.

Edited options and set the text in the '**Default Billing Job Description**' memo fields.

A list of available macros is displayed in the text box to the right of these fields.

Managed Services - General Updates

The following is a list of other enhancements and updates to the Jim2 Managed Services Edition:

Area	Feature	Description
Project	Billing	Now supports billed 2 yearly and 3 yearly
Project List	Finish	Machine List now include a 'FINISH' status tickbox
Project List	Groups	Now supports 'inverting' Machine and Item group selection as per Job List (double click on label)

Updated Security settings

The following additional security settings have been added:

Security > Project

- Edit Default Stock

Security > CardFile

- Reassign Users

Security > Dashboard

- View Management Dashboards
- Dashboard Security
- Manage Dashboard and Widgets

Security > Tools

- Item

Note: Please make sure you update your users' security settings as they may be enabled by default.

Updated Options

The following additional **Tools > Options** settings have been added or updated:

All Editions

Options > Tools > Options > Item

- I call Item
- I call Make
- I call Model

Options > Accounts

- Enable automatic daily credit hold check
- When outside terms by (days)

Options > Retail & EFTPOS

- EFTPOS Card Present
- EFTPOS Server
- Port
- EFTPOS Transaction Report

Managed Print Services Edition only

Options > Projects > Machines

- Request by: Web Email
- Request by: Text Email
- Default Billing Job Fault Description
- Default Billing Job Invoice Description

Managed Services Edition only

Options > Projects > Managed Services

- Default Billing Job Fault Description
- Default Billing Job Invoice Description

Note: Project Options has been split in separate options for Machines and Managed Services.

New and Updated Reports

All system reports have been updated for Jim2 v3.1.

- Project Reports have been split into separate report folders – MPS (machines), Managed Services, Licensing
- Project – Service History
- Project – E Meter Setup (Makes website contacts for all the machines in the list and sets them to Web Email)
- Project List - Meter Profit
- Project List – Card File Export (CSV, XML)
- Invoice Reports – DL Envelope
- Statement Reports – DL Envelope
- Quote Reports – DL Envelope
- Job List - Job Labour Analysis (Actual Verse Billing)
- Management Reports – Debtors and Creditor Payments are now MC enabled

Jim2 Update enhancements

Jim2 v3.1 includes a new **Jim2DBUpdate** program and now checks the following prior to updating:

- Now checks it can upgrade all files before unpacking
- Now checks SQL version - Jim2 v3.1 requires MS SQL 2005 or greater

Technical Information & Requirements

Windows 7 Support

Windows 7 (all editions) is supported by Happen and is compatible with Jim2 BE v3.1.

Database Vxxx

To upgrade from Jim2 v3.0 to Jim2 v3.1 backup your database then run **Jim2Upgrade_v31_XXXX.exe** from your server.

The Jim2 update program will automatically update an existing Version 2.18 or higher databases to the current Version 3.1. That is – by running the Version 3.1 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_v31_XXXX.exe** upgrade program.

Note: If you are not running at least v2.18 you must upgrade to v2.18 prior to upgrading to v3.1. 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 v3.1

Jim2 Server has been updated to support the new features in Jim2 v3.1.

Microsoft SQL Server

Jim2 fully supports all versions of Microsoft SQL Server from version 2005 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 (both 32 and 64 bit versions)

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

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

Please also note that Microsoft SQL Server versions LESS than SQL 2005 are no longer supported by Happen Business.

Jim2 Training

Jim2 Training is available for your Staff. Training is conducted at our premises at Mortdale NSW, or remotely via the Web. We are able to conduct training on a one-on-one basis, or group training.

Please call Ros on 02 9570 4696 to enquire about training for yourself and your staff.