Jim2® Business Engine
Version 4.0 Service Release (all editions)

Release Notes

Jim2® Business Engine v4.0 Service Release Notes
Wednesday 5 August 2015

Jim2® v4.0 Service Release – Build 4960

This document covers new features and enhancements made to Jim2 v4.0 since its official release in February 2015. Many 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 v4.0 Release Notes.

Features and Enhancements summary – All Editions

General
• Windows 10 support.
• Jes Mobile API updates to support new Jim2 Mobile functionality.

Jobs
• Manufacturing Jobs handles 'Fixed Qty' stock, for example, Machine Setup.

Stock
• Short Description extended to 256 characters (was 50).
• Last Update date field in Vendor tab is now included in Stock Sync process.
• Stock on Hand now shows Stock in location TXFR transfer 'To' location.
• Manufacturing Stock to Inactive will prompt to see if you also wish to set the Item to inactive.
• Updated Stats tab on Stock. There is also a right click 'View Transfer' when the Location is TXFR.

Stock Transfer
• Now supports 'Date Due' (as per Purchase Orders).
• Ability to add comments to Transfers when on 'Transfer' status.

Stock Procurement
• Show 'Stats' for transfer from locations.
• New 'right click' round to unit measure feature – Allows rounding of current line, or all lines, to round up box qty.

Purchase Orders
• New 'right click' round to unit measure feature – Allows rounding of current line, or all lines, to round up box qty.

Items
• Manufacturing Item to Inactive will prompt to see if you also wish to set the Item to inactive.
• Manufacturing Item now supports 'Fixed Qty' stock.

Watchouts
• Watchouts to allow logging to comments.

Documents
• New Document 'Usage' Image/Signed Document/Signature/Picture.

eBusiness Link/Supply
• eBusiness import CardFile report level groups.

Updated Security Settings
• Branch level security thas been added to both Jobs and Purchase Orders.

Reports/Scripts Updated
• Updated system Reports/Scripts.
• New report – Management > Reports > System > Database statistics.

Jim2 v4.0 and Document Management feedback

Jim2 v4.0 introduced the new Document Management functionality. The feedback we have received has been extremely positive...

"We are using Jim v4 and we have to say we are very impressed with the update." Joel Givney SFR

"I would just like to thank Happen for the commitment the team has put into the latest Version 4 release. This has been a fantastic update to an already great software package.

"The addition of document control and the new ability to enter payment directly against a job without the need to go to the debtors payment screen is a huge benefit to my retail business.

"The installation of the update was a quick and simple process."

Peter Apsey – JSTM

Welcome to all of our new Jim2 Users!

These release notes provide insight into the changes that are introduced during version upgrades, and how YOU can take advantage of them at your site. Examine each one carefully to see how your business will benefit most from the new version of Jim2 Business Engine.

General

Windows 10 Support

This service release is 100% Windows 10 compatible and includes database driver updates that are required for use under Windows 10.

Jim2 Mobile – Jes Mobile API updates for new Jim2 Mobile functionality

This service release includes updates to the Jes Mobile API to support new Jim2 Mobile functionality. Upon upgrading, the new functionality will be available via the Jim2 Mobile App (assuming you have also downloaded the latest update from the App Store).

Jim2 Mobile – Document Folders, Tags and Categories

Now you have the option to not only search for specific documents, but also search for specific 'types' of documents from Jim2 Mobile.

In the latest version, we've added the ability to search by folders, tags and categories to find specific types of documents in an instant.

In addition to new search filters, when adding new images to a Job from your mobile device, you can now also assign it to a folder, add tags and assign the image a category on the spot.

The folder 'interface' on Jim2 Mobile is quite unique, as 'folders' are not easily supported via iOS (as seen in Apple's email client). When selecting **Documents > By Folder**, you are presented with '**All Folders**' and '**(Root)**', along with a list of all your 'main' folders.

If a folder has sub-folders, the folder will be shown as **solid blue** with a **solid arrow**. This means there are sub-folders (solid blue), and a 'swipe' is possible (solid arrow). Swiping the folder from left to right will expand/collapse the sub-folders. This sounds a lot more complicated than it is in action, so just try it out.

Note: The '**solid arrow**' is a consistent UI element throughout Jim2 Mobile and indicates that a '**swipe**' action is available.

Jim2 Mobile – CardFile Report Groups

Much like Document folders, a similar selection method is available from **CardFile > CardFile List** when selecting **Report Groups**.

Jim2 Mobile – New Labour views

Wouldn't it be great to see how many hours labour you have tallied today, or even this week, to make sure you are keeping on top of individual targets?

Now it's easy to see a complete breakdown of labour for a particular period via Timers from the Jim2 Mobile main menu.

Click **Timers**, and then click **Labour**. You can now select **Today**, **Yesterday**, **This Week**, or **This Month**. A summary of total hours/minutes for the period selected is also displayed.

Jim2 Mobile – Barcode Scanning

With the latest version of the mobile app, simply scan Jim2 barcodes to search and open a Job, Quote, Stock code, or Project/Machine code.

Find these new search options throughout Jim2 Mobile:
- **Jobs > Scan Job #**
- **Quotes > Scan Quote #**
- **Stock > Scan Stock #**
- **Projects > Scan Project #** (specific to Managed Services Edition)
- **Machines > Scan Machine #** (specific to Managed Print Services Edition)

You can, whilst onsite for example, select **Machines > Scan Machine#** and scan a Machine's barcode. Then quickly add a related Job including Billing, Service Read, Onsite etc.

Jim2 Mobile – Invoice Reports

You can now view/print/email Invoice reports from Invoiced Jobs.

Jobs

Jobs – Manufacturing Jobs 'Fixed Qty' Stock
Manufacturing Jobs now handles 'Fixed Qty' stock, for example a 'Machine Setup'.

Stock used in the manufacturing process is added to the Stock's related Manufacturing Item. This is the stock required to manufacture ONE product. When changing the QTY to manufacture, the Stock is multiplied by that QTY.

Ticking the new 'Fixed Qty' checkbox on the Manufacturing Item's Stock will keep that Stock's QTY the same regardless of qty of stock being manufactured.

This is useful for Stock like 'Machine Setup', where there is ONE machine setup per Manufacturing Job regardless of the qty of stock being manufactured.

Jobs – Manufacturing Jobs Stock order
Additionally, the order of Stock added to the Manufacturing Job is now the same as it is on the Manufacturing Item.

Stock

Stock – Short Description extended to 256 characters
The Short Description (under the Descriptions tab) has been increased from 50 characters to 256.

Stock – Stats Tab
The **Stock Stats** tab has been updated and now displays three additional columns:

- **Transfer#**   The Stock Transfer#
- **TXFR Loc**   The location that the Stock is being transferred to
- **TXFR Due**   The Stock Transfer's Due date

You can now also right-click '**View Transfer**' and view any related Stock Transfer.

Stock – Stock on Hand Tab
The **Stock On Hand** tab now includes an '**On Transfer**' column displaying the Qty of stock currently on transfer to that location (Transfer To location).

Stock – Marking Manufacturing Stock as Inactive
Marking Manufacturing Stock as Inactive now prompts you to set the linked Manufacturing Item as Inactive, if you wish.

Import Data – Stock
The **Last Update** date field on a Stock's Vendor tab is now included in **Tools > Import Data** Stock Sync process.

Stock Transfer

Stock Transfer – Date Due
Stock Transfer now includes 'Date Due' (as per Purchase Orders) to indicate the date the transfer is due to arrive at the 'Transfer To' location. This is useful for interstate or international transfers which may take several days to arrive.

Stock Transfer – Add Comments on Transfer
Additionally, you now have the ability to add comments to Transfers when on the 'Transfer' status.

Stock Procurement

Stock procurement – Transfer From Stats
Stock Procurement now shows the 'Stats' for 'Transfer from' locations. This allows you to easily see if there is enough Stock in locations to transfer from.

Stock Procurement – Round to Unit Measure
Stock Procurement now includes a new 'right click' round to unit measure feature. This allows the quantity of current line, or all lines, to round up, for example Unit Measure 2 BOX quantity.

Purchase Orders

Purchase Orders – Round to Unit Measure
Purchase Orders now includes a new right-click round to unit measure feature. This allows the quantity of current line, or all lines, to round up, for example Unit Measure 2 BOX quantity.

Items

Items – Marking Manufacturing Items as Inactive
Marking Manufacturing Items as Inactive now prompts you to also set the linked Stock to Inactive, if you wish.

Items – Manufacturing Item 'Fixed Qty' stock
Stock on Manufacturing Items now includes a new 'Fixed Qty' checkbox. Ticking this checkbox will keep that Stock's QTY the same regardless of quantity of Stock being manufactured.

This is useful for Stock like 'Machine Setup', where there is ONE machine setup per Manufacturing Job regardless of the qty of stock being manufactured.

Watchout Logging

Watchouts – Add to Object
Watchouts (**Tools > Watchouts**) now includes an '**Add to Object Comments when fired**' checkbox. Ticking this checkbox will automatically log that Watchout to the related object (Job, PO etc) allowing an audit trail that the Watchout was fired, when, and by whom.

Documents

Documents – New Picture Usage Type
Documents now includes an additional '**Usage**' type '**Picture**'. Pictures attached to Jobs, Quotes etc via Jim2 Mobile will automatically be assigned the '**Picture**' usage type.

Document Lists – Search By CardFile
Document Lists now include a new '**CardFile#**' search criteria. This allows generating a list of all Documents related to a specific CardFile.

eBusiness Link/Supply

Jim2 eBusiness Link/Supply now supports CardFile report level groups within the XML.

Updated Security settings

Branch level security has been added to both Jobs and Purchase Orders. Also, Job related Branch security has moved into its own Branches 'section'.

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

Security > Jobs > Branches
• View Jobs from different Branches

Security > Purchases
• View Purchases from different Branches

New Reports/Scripts

The Jim2 v4.0 Service Release updates all system reports and scripts. Additionally the following system report has been added:

Management > Reports > System > Database statistics

Several reports have also been updated to 'Server Side', meaning they are now available via Jim2 Mobile.