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Jim2® Business Engine  
Version 4.2 (all editions)

# Release Notes

## Jim2® Business Engine v4.2 Release Notes – 06/06/18

### Welcome to Jim2 Version 4.2 – ‘Security and Multilevel Manufacturing’

Jim2 v4.2 introduces numerous new features and enhancements throughout most areas of Jim2.

With a focus on matching user security to the multi-faceted roles of staff (especially in larger companies), Jim2 v4.2 includes major updates to security, including new effective security roles, enhanced overall visibility of user security and roles, new user groups functionality, trackable reports, and greatly enhanced history and logging.

Another major feature is the introduction of multilevel manufacturing capability, allowing the use of manufactured products (sub-assemblies) to be used in other manufacturing processes.

Jim2 v4.2 also includes CardFile updates, new regional settings, increased list counts, major performance improvements, and dozens of additional enhancements and fixes.

#### User Groups

- New User Groups field, which introduces User Group Category and User Group Tags to sort staff into departments and roles. Organise users, ready to match with new enhancement to Items that enable jobs and quotes to be allocated to a User Group, rather than individual staff. Great for updating Items when a new staff member joins, moves to a new role, or moves on.

#### User Security

- New focus on User Security Groups, and now being able to assign a user to multiple security role profiles to suit the many hats they wear within the business.
- Expansion of the User Security window to also include new security tabs that display 'By User' and 'By Group'. This enables system administrators to compare multiple users' security profiles to see each staff member's user access as per their role profile, and also in comparison to other users' profiles, in an easy to compare view.

#### Updated Security

- Security is now non-modal and available in the Nav Tree.
- New Export and Report Security that logs when a user views, exports or prints a Jim2 Report.
- New Security option that enables users to view Object History.

#### History

- Completely updated Object History table that includes the ability to search by User and Date in.
- New functionality to right click history entries and go directly to the job or quote, etc.

#### Manufacturing

- New Fixed Cost Multilevel Manufacturing functionality that enables businesses to accurately capture each layer of their manufacturing process, and account for costs using new off-set account functionality.

#### CardFiles

- New option to restrict CardFile Contact Types to the types listed in Setups.
- New invoice and statement options available to Print & Email.
- New functionality to nominate multiple email contacts for invoicing, statements, purchases.
- New Ship Card tab which displays all associated shipping CardFiles (and contact details). This table can also be filtered and sorted.
- New Backorder setting added at a CardFile level to capture when a customer does not want to receive part orders. They can nominate to only receive full orders, without any items on backorder.

#### Items

- Updated User Selection Grid to assign Items to new User Groups.

## Stock

- New Total Cost Summary field added to the Stock Stats tab.
- New security option to enable a user to Flag All Stock as Inactive.

## User Interface

- Lists – Maximum limit increased from 20 to 25 for each object in the Nav Tree.
- New Current Locks tab added to the Logged Users window, which displays existing locked objects, and the active user.
- Jim2 Search – Search stock enhancements.

## Email

- Email List – New option to create purchase order or expense order from an email, and have the email linked to the new object.
- Email Templates – New option to create a copy of an existing email template.
- Email Templates – Reorganised the display of quote macros and invoice macros in an email template.
- Email Rules – Allow option to scan the 'decoded' text within emails in email actions window. This simplifies the process of extracting information from an incoming email, ie. looking for a serial number, which typically requires the use of a complex Regular Expression.
- Email Rules – New email action 'Execute Script' for execution of server-side script for a given email.
- Email Rules – New email action 'Process with MPS connector' to process an email and pass it through for processing via an MPS Connector.

## Managed Print Services

- New Daily rate-based meter that takes contract in/out into account.
- Fast background loading of Consumables pane.

## Miscellaneous

- Schedule – View Saturday/Sunday as separate columns.
- Debtors List – Filter by Account Manager.
- Invoicing – Additional function keys to speed up taking payments.

## Performance

- Jim2 Client now uses much less memory, and is faster at reloading lookups.
- Auto Credit hold is now server side and no longer delays logins.

## Jim2 Server

- Jim2 Server is now much faster at backups where native SQL compression is available (e.g. non-Express versions).

## Security Settings

- New security settings including View History, User Groups, and more.

## Options

- New Regional Settings option nominate what you call ABN, Suburb, State, Postcode, GST specific to the region with which the company operates, and allows to nominate the report date format.
- New accounts option to nominate GST country, selecting from Australia, New Zealand and South Africa.
- Invoice multiple branches.
- Base stock location on From# or Ship#.

# 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. With easy-to-follow screen shots, examine each one carefully to see how your business will benefit most from the new version of Jim2 Business Engine.

# Getting Started in Jim2 v4.2

## Things to know prior to upgrading

Typically, Jim2 v4.2 will simply install and run, however, there are a few things to be aware of prior to running the upgrade. It's important to note that support of versions prior to Jim2 v4.1 has now ceased. If you are currently running any v3.X build, please contact Happen Business to obtain instructions before upgrading.

**All Jim2.Cloud users will automatically receive notification via email that we will complete your upgrade to this version. To all on premises customers, we strongly recommend all users upgrade to the current version of Jim2.**

### Anti-Virus Exclusions

It is recommended that the primary Jim2 executables are excluded from real time scanning, both at the Desktop and Server level.

Where possible, the Happen Business Program file folders should be completely excluded.

### Server Folders (include sub folders)

C:\Program Files\Happen Business\  
C:\Program Files(X86)\Happen Business\

### Desktop Folders (include sub folders)

C:\Users\frank.lampard\AppData\Local\Happen Business\LocalJim2\

### Terminal Server Folders (include sub folders)

C:\Program Files (x86)\Common Files\Happen Business\JimClient\

### Server Files (Trusted Applications)

Jim2Server.exe  
Jes.exe  
JimReportServer.exe  
Jim2.exe  
Jim2Client.exe

### Desktop Files (Trusted Applications)

Jim2.exe  
Jim2Client.exe

### Terminal Server Files (Trusted Applications)

Jim2.exe  
Jim2Client.exe

\*We also recommend server exclusions for SQL files as per Microsoft recommendations – <https://support.microsoft.com/en-us/kb/309422>

### Jim2 Server Prerequisites

Jim2 Server requires Microsoft .NET 4 Framework Version 4.6.2 or above, and Windows Installer 4.5 to be installed. The updater will check and confirm that they are installed, or will prompt you to install them. Requirements:

- Microsoft .NET Framework 4.6.2 must be installed (the installer will fail to complete on Server 2008 R2 and SBS2011 if not running the latest .NET).
- Windows Installer 4.5 must be installed.
- Windows Server 2012, or above with .NET 4.6.2, or above.
- SQL Server 2012 or later Microsoft SQL (Server SQL Server 2017 recommended).
- Jim2 now also supports SQL 2017.
- SQL Server 2005 and 2008 and 2008 R2 are no longer supported.

### Jim2 Client Prerequisites

Some new functionality requires the Microsoft .NET 4 Framework to be installed on computers running the Jim2 Client application. Jim2 will still run, however, some areas of Jim2, such as Email and the Dashboard, will not function. Requirements:

- Microsoft .NET Framework 4.6.2 must be installed.
- Windows 8, 8.1 or 10 (Windows 10 Recommended).

**Note: Windows 7 and prior are no longer officially supported.**

### Jim2 eBusiness Framework (JEF) Prerequisites (since v3.3)

Jim2 eBusiness Framework (JEF) requires Microsoft .NET 4 Framework and Windows Installer 4.5 to be installed. Requirements

- Microsoft .NET v4 Framework must be installed.
- Windows Installer 4.5 must be installed.

# Features and Enhancements – All Editions

## User Groups

User Groups allow tagging a User CardFile to a specific User Group Category, and one or more User Group Tags. This allows **Items** to be allocated to User Groups, rather than individual users, and is also used within our new Security functionality to ease setup and increase visibility of user security.

Importantly, User Groups are not tiered, or based on a user's Security Group. For example, a user can be in a User Group of **Service**, but be in Security Group of **Service Level 1**, or **Service Manager**.

Users can belong to one User Group Category, and one or more User Group Tags.

### User Group Categories – Examples

- Sales
- Service
- Accounts
- Warehouse

### User Group Tags – Examples

- Level One Technician
- Level Two Technician
- Certificate A
- Certificate B

### Creating and Updating User Groups

You can create User Groups via **Tools > Groups > User Groups**. Click **Tags** or **Category**, then right click on **(root)** and select **Add Group** to add a new group.

Delete a User Group by right clicking on the Group and selecting **Delete Group**.

To rename a User Group, select the Group, click on the Group, and rename as required.

## Adding Users to User Groups

### Adding via User Groups

Open User Group Management via **Tools > Groups > User Groups**. Click on the **(root)** in the left hand pane. Select one or more users (using standard Windows multiselect **Control+Mouse click** or **Shift+Mouse click**), and drag the selected users into a group.

### Adding Security Groups to a User's CardFile

You can also add User Groups to a specific user as follows: Edit a user's CardFile via **CardFiles > View/Edit CardFile** (or from a CardFile list), click **Edit**, then click the **User** tab. Click on the ellipsis of the User Groups selection box, and select the groups as required.

### Using Users Group with Items

Jim2's Items functionality has been updated to fully support User Groups. To recap, an Item allows you to specify which users a job (or quote) with this Item can be assigned to. You can now specify this at both a User and User Group level.

For example, by adding a user to the User Group 'Service', any user in that group can be assigned a job (or quote) with an Item that has a User Group 'Service'.

To add a User Group to an Item, edit the Item via **Items > View/Edit Item** (or from an Item list), click **Edit**, click the **Item** tab, then tick the User Group Tags or Categories you wish to allow this Item to be assigned to.

# Security Enhancements

## New Effective User Security Groups

Maintaining many users with various roles and their related security groups can be challenging. For example, you have a user that is in a sales role, but also does basic accounts, and a bit of purchasing.

Rather than creating a custom security profile for this staff member, you can now add multiple Security Groups to their CardFile to define their Security access. The merging of these multiple Security Groups creates their 'effective' Security Group.

For example:

Security Group	Security Functions Enabled	Report Level	Status Level	Price Break Movement
Sales	Add/Edit/View Jobs and Quotes	1	1	1
Invoicing	Mark as Ready and Invoicing	2	1	1
Debtors	Add Payments, etc.	5	5	-1
Banking	Allow Banking	10	10	-1
Purchasing	Add/Edit/View Purchase Orders	5	5	-1

User	Security Groups	Report Level	Status Level	Price Break Movement
John	Sales, Invoicing	2	1	1
Mary	Sales, Invoicing, Debtors, Banking, Purchasing	10	10	-1

In the above example, John's security is all functions enabled in both the Sales and Invoicing Security Groups, and the highest level of Report Level, Status Level, and Price Break Movement from the selected security groups.

## Adding a User CardFile to Multiple Security Groups

To add a user to multiple Security Groups, edit a user's CardFile via **CardFiles > View/Edit CardFile** (or from a CardFile list), click **Edit**, then click the **User** tab. Click on the ellipsis of the Security selection box, and select the Security Groups as required.

User		
Initials <input type="text" value="FL"/>	Def. Stock Location <input type="text" value="NSW"/>	Rate \$ <input type="text" value="0.00"/>
Password <input type="password" value="*****"/>	Def. Labour Type <input type="text" value="Workshop"/>	Security <input type="text" value="Manager;Sales;Technician"/>
Email <input type="text"/>	<input type="checkbox"/> Auto send BCC	Customers <input type="text"/>
Web Login ID <input type="text"/>	<input type="checkbox"/> Allow Web Access	User Groups <input type="text" value="Level One Technician, Service"/>

## Security Updates

The Jim2 Security screen has been updated to allow better viewing of a user's effective security, and to view and compare the security of multiple users at the same time. Security settings can now also be printed and/or exported.

### Viewing and Editing of Security Groups

The viewing and editing of Security Groups is much the same as previous versions of Jim2, but the Security form is now opened in the Nav Tree, allowing the viewing and editing of a user's CardFile without having to close the Security screen.

Additionally, the Security form has been updated with new tabs to view a user's Effective Security Group, and to compare the user's security settings.

To view/add/edit Security Groups click **Tools > Security**.

## Viewing a User's Effective Security Group – By User

Open Security via **Tools > Security** and click on the **By User** tab. You will be presented with a tree displaying a list of Active and Inactive users, and a tree displaying their Effective Security Group and the Security Groups they belong to.

Click on a user and the Security Groups that the user belongs to will be displayed, along with their Effective Security Group. This allows an easy way to view exactly why a user has access to certain areas and functions in Jim2 based on the Security Groups they belong to.

You can right click on a user to view or edit their CardFile and which Security Groups they belong to.

You can also right click in the right-hand tree to print or export a user's security settings.

**Viewing Security**

Security | By User | By Group

	Area	Manager	Sales	Technic
<div style="margin-left: 10px;"> <b>Users</b> <ul style="list-style-type: none"> <li><b>Active</b> <ul style="list-style-type: none"> <li>Frank Lampard</li> <li>Greg Tegal</li> <li>Happen Business Pty Limited</li> <li>Harry Rednapp</li> <li>Jole Cole</li> <li>Michael Carrick</li> <li>System administrator</li> </ul> </li> </ul> </div>	<input type="checkbox"/> Jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/> Projects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/> Quotes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Purchases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> CardFile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Stock	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Banking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Reports	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/> Business Analysis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Budgets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Cash Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/> Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Tools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/> Multicurrency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Scheduling	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/> eBusiness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/> Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/> Jim2 eBusiness Framework (Jef)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Dashboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Lists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Templates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Report Level		1	1	1
Status Level		10	10	10
Price Break Movement Down		-1	-1	-1

Add
Delete
Edit
Close

## Viewing and Comparing Security of Multiple Users – By Group

Open Security via **Tools > Security** and click on the **By Group** tab. You will be presented with a tree displaying a list of Active and Inactive users, along with User Group Categories and Tags.

Ticking one or more checkboxes will display those users, along with their Effective Security Groups. For example, clicking on Active will display all Active users. Clicking on a User Group displays all users in that User Group, etc.

You can right click on a user to view or edit their CardFile and the Security Groups they belong to.

You can also right click in the right-hand tree to print or export the selected user's Effective Security Group settings.

Viewing Security

Security | By User | By Group

	Area	Frank Lampard	Greg Tegal	Jole Cole
<ul style="list-style-type: none"> <li>[-] Users               <ul style="list-style-type: none"> <li>[-] Active</li> <li>[x] Tags                   <ul style="list-style-type: none"> <li>[x] Level One Technician                       <ul style="list-style-type: none"> <li>[x] Frank Lampard</li> <li>[x] Greg Tegal</li> </ul> </li> <li>[x] Level Two Technician                       <ul style="list-style-type: none"> <li>[x] Jole Cole</li> </ul> </li> </ul> </li> <li>[-] Categories               <ul style="list-style-type: none"> <li>[-] Accounts                   <ul style="list-style-type: none"> <li>Michael Carrick</li> </ul> </li> <li>[-] Service                   <ul style="list-style-type: none"> <li>Frank Lampard</li> <li>Greg Tegal</li> <li>Jole Cole</li> </ul> </li> </ul> </li> </ul> </li> </ul>	[-] Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> View Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Edit Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Add Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> View other users Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> View other Account Managers Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> View READY/Invoiced Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Edit other users Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Edit other users Job comments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Edit other Account Managers Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Delete other users Job comments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Mark as READY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Docket Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/> Docket Jobs from List	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Unprint Docket Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Allow Jobs with Customers on Credit Hold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Allow to apply credits during Invoicing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Unprint Manufacturing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Manufacture stock	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Change Price Level	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Change Account Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Change Job Tax Paid	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Show Customer account balance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Allow Show Total on List	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	[-] Return From Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	[-] Dispatch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	[-] Invoice	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	[-] Branches	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	[-] Stock on Jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	[-] Projects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[-] Quotes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
[-] Purchases	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Report Level		1	1	10
Status Level		10	10	10
Price Break Movement Down		-1	-1	-1

Add Delete Edit Close

## Trackable Reports

Trackable reports allow a report to be tracked when printed, emailed or exported (logged in History) from a security point of view, and records the number of times this has happened, providing 'Printed X times' functionality on reports, etc.

By default, all reports are not tracked, and must be flagged as **Trackable** to enable this functionality.

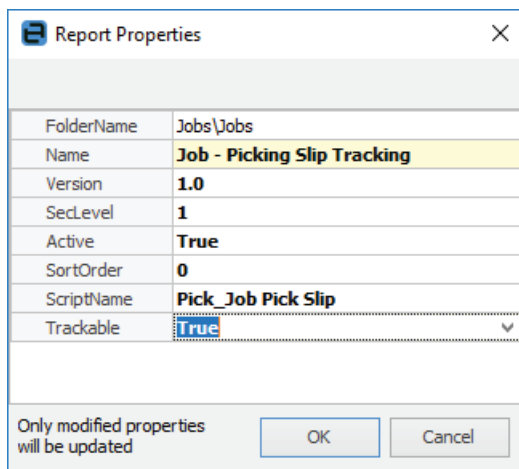
**Note:** It is recommended to only flag key reports as trackable based on either your security requirements, or if 'Printed X times' functionality is required (eg. picking slips).

Whenever a Trackable Report is previewed/printed/emailed/exported a History log entry is made that includes the following information:

- Date and Time report invoked.
- User who invoked the Report.
- Related Jim2 Object Type (Job, Quote etc).
- Related Jim2 Object Number (Job No, Quote No).
- Report Event (Print, Preview Emailed, etc.).
- Report path and name.

### Marking a Report as Trackable

To mark a report as trackable, open Report Designer via **Tools > Report Designer**. Select the report you wish to flag as **Trackable** and click **Properties** from the ribbon. From the Properties form, change the Trackable report property to **True**.



The screenshot shows a 'Report Properties' dialog box with the following fields:

FolderName	Jobs\Jobs
Name	Job - Picking Slip Tracking
Version	1.0
SecLevel	1
Active	True
SortOrder	0
ScriptName	Pick_Job Pick Slip
Trackable	True

At the bottom, there are 'OK' and 'Cancel' buttons, and a note: 'Only modified properties will be updated'.

### Viewing a Trackable Report's History

If a report is trackable and related to a Jim2 Object (Job, Quote etc), the report log is displayed within the history of that object. For example, if a picking slip was printed for Job#1234, the log of that is displayed when viewing the history of Job#1234.

For reports that are not related to an object, or to see any trackable reports, select **Report Tracking** as the **Object** in the **Tools > History** selection criteria.

### Accessing Trackable Report Variables via Report Designer and Scripting Engine

One of the benefits of marking a report as trackable is the ability to display how many times it has been printed on the actual report.

Several variables are now available within Report Designer, via the JimSystem report pipeline, to enable this functionality.

Report DataPipeline	Report Variable	Type	Description
JimSystem	ReportTrackable	String	T if report is trackable
JimSystem	ReportTrackable_ExportCount	Integer	Number of times exported
JimSystem	ReportTrackable_PreviewCount	Integer	Number of times previewed
JimSystem	ReportTrackable_PrintCount	Integer	Numbers of times printed



Typically, you would add a Label component to a report, and add an OnGetText event to that label with RAP code as follows:

```
procedure LabelTrackableOnGetText(var Text: String)  
begin  
    Text := '';  
  
    if (JimSystem['ReportTrackable'] = 'T') and (JimSystem['ReportDestination'] = 'Printer') then  
        begin  
            if JimSystem['ReportTrackable_PrintCount'] = 0 then  
                Text := 'First time printed'  
            else  
                Text := 'Report print count = ' + IntToStr(JimSystem['ReportTrackable_PrintCount']);  
            end;  
        end;  
  
end;
```

The following properties are available within the **Scripting Engine** via the **ReportLogger** object;

```
ReportLogger.IsLogging  
ReportLogger.PrintCount  
ReportLogger.PreviewCount  
ReportLogger.ExportCount
```

Sample Scripting Engine code:

```
if (ReportLogger.IsLogging) and (ReportLogger.PrintCount = 0) then  
    begin  
        // first time printed  
        ...  
    end;
```

## History – Updated

History is now displayed in the Nav Tree, and has been updated to be more 'list' like, allowing searching by user, date ranges, last 1000, etc. Additionally, History now logs more events, including trackable reports, and allows easy access to Jim2 Objects (Jobs, Quotes etc).

A new security option, 'Allow viewing History', has also been added, so be sure to update your Security Groups as required via **Tools > Security – Tools > Allow viewing History**.

To open History, click **Tools > History**. The default **Most Recent** selection criteria displays the last 1000 logged events. Edit the selection criteria as required and click **Run**.

Right mouse click on most events displayed will produce a popup menu to view the event's related object (Job, Quote etc), or to export or print the log.

Normal list/grid grouping, sorting and filtering is available.

**History**

Object <Any> Value

User  Date >  31

Most recent 1000 Date <

Drag a column header here to group by that column

Object Type	Ref #	Log Event	Initials	Date Stamp	Comments
Job	3098649	Edit	TD	24/05/2018 05:27:33 PM	
Job	3098573	Edit	TD	24/05/2018 05:27:15 PM	
Job	3099367	Edit	RM	24/05/2018 05:26:42 PM	
Job	3099367	Edit	RM	24/05/2018 05:24:34 PM	
Quote	2011868	Add	JG	24/05/2018 05:19:57 PM	
Job	3097270	Edit	JL	24/05/2018 05:17:13 PM	
Job	3099365	Edit	LF	24/05/2018 05:14:46 PM	
Quote	2011445	Edit	PBL	24/05/2018 05:14:20 PM	
Job	3099242	Edit	ID	24/05/2018 05:14:14 PM	Added comment
Job	3099086	Edit	CR	24/05/2018 05:10:20 PM	Saved Timer
Job	3099364	Edit	RM	24/05/2018 05:07:48 PM	
Quote	2011820	Edit	PBL	24/05/2018 05:07:36 PM	
Job	3099370	Edit	SM	24/05/2018 05:06:27 PM	
Job	3099370	Add	SM	24/05/2018 05:05:48 PM	
Job	3099361	Edit	SM	24/05/2018 05:04:55 PM	
Job	3099362	Edit	SM	24/05/2018 05:04:35 PM	
Job	3099362	Edit	RP	24/05/2018 05:04:13 PM	
Job	3099364	Edit	RM	24/05/2018 05:04:02 PM	
Job	3099336	Edit	RM	24/05/2018 05:02:38 PM	
Job	3099368	Edit	RM	24/05/2018 05:01:11 PM	
Job	3099365	Edit	LF	24/05/2018 05:00:15 PM	
Job	3099342	Edit	SM	24/05/2018 04:58:03 PM	
Job	3099089	Edit	LF	24/05/2018 04:55:47 PM	
Script	0	Run	TRO	24/05/2018 04:46:46 PM	Client Versions
Quote	2011820	Edit	PBL	24/05/2018 04:38:09 PM	Added comment
ScheduleTask	23046	Add	PBL	24/05/2018 04:30:28 PM	Added scheduled task
Quote	2011792	Edit	FG	24/05/2018 04:29:50 PM	Paused Timer
Job	3099369	Add	LF	24/05/2018 04:22:35 PM	
Quote	2011866	Edit	PBL	24/05/2018 04:20:25 PM	
Job	3094356	Edit	SM	24/05/2018 04:18:06 PM	Updated Timer
Job	3099086	Edit	CR	24/05/2018 04:15:07 PM	Created new Timer
eBusinessOut	52042	Edit	SYS	24/05/2018 04:12:50 PM	
eBusinessOut	52042	Add	SYS	24/05/2018 04:12:49 PM	
CardFile	ARCOLEC	Edit	JG	24/05/2018 04:12:45 PM	
eBusinessOut	52041	Edit	SYS	24/05/2018 04:11:30 PM	

➔ Run
✖ Cancel

## Multilevel Manufacturing (Fixed Cost)

Jim2 v4.2 includes new Multilevel Manufacturing functionality, commonly called Fixed Cost Manufacturing. This provides the ability to include manufactured stock within manufactured stock. For example, the manufacture of several different sub-assemblies that are then used in other sub-assemblies, and/or the final manufactured product.

Multilevel manufacturing is a new method of manufacturing that is in addition to the existing Single Level Manufacturing process.

From an operational point of view, multilevel manufacturing is just like single level except that the manufactured products are put into stock at a known fixed cost, chosen at any point up to the selection of the **Manufacture** icon.

### Single Level vs Multilevel

Manufacturing Method	Details
Single Level	<ul style="list-style-type: none"> <li>Finished manufactured product put into SOH at exact cost of included parts (and labour, if configured via options).</li> <li>Any additional costs related to parts/stock used (from PO FINISH or Expense Order, etc.) are also included in manufactured stock SOH cost, and flow through to COGS if stock sold.</li> <li>Must be the final manufactured product.</li> <li>Can include parts/stock that are produced via multilevel manufacturing.</li> </ul>
Multilevel	<ul style="list-style-type: none"> <li>Finished manufactured product put into SOH at fixed cost at point of manufacture.</li> <li>The cost difference between the fixed cost and actual costs of parts (and labour, if configured by options) are offset to the linked Fixed Cost Offset GL Account.</li> <li>Any additional costs related to parts/stock used (from PO FINISH or Expense Order, etc.) are offset to the linked Fixed Cost Offset GL Account.</li> <li>Can be used in other manufacturing processes, including single level.</li> </ul>

### Multilevel Manufacturing – Overview

Selecting a multilevel manufacturing option enables you to choose already manufactured stock (fixed cost) as a further ingredient in your manufacturing process, ie. you can use a finished product as a component to manufacture a further product, and so on, to produce the finished product.

This is possible because the cost of manufactured stock is fixed and set on the manufacturing Job. It is not updated when finishing purchase or expense orders of stock used in the manufacturing process, as compared to single level manufacturing.

- When selecting multilevel (fixed), you can set the default Manufacturing Cost in the Details tab on the stock screen.
- Jim2 uses a Fixed Cost Offset account in your general ledger to account for the difference in cost between the actual costs and the set fixed cost. When completing a manufacturing job by moving to FINISH status and selecting the **Manufacture** icon from the ribbon, the Fixed Cost Offset account will show the difference between the fixed cost set on the job, and the actual cost of the stock codes used. For example, if all stock codes used in manufacturing are from purchase orders on Received, then the full cost will be offset. When purchase orders are set to FINISH, Jim2 will reduce the offset account by the cost of the stock.
- Labour can be included as a cost of manufacture.
- You can manufacture unlimited levels of multilevel manufactured stock.
- The cost of a multilevel (fixed cost) manufactured stock does not fluctuate with changes in material and labour costs.
- The last level of a manufactured stock can use either option: multilevel or single level manufacturing.

An important difference (compared to single level manufacturing) is, once the fixed cost stock is manufactured, its cost will not be affected by expense orders, thus enabling the stock codes to be used as parts in another manufacturing job.

### Setup – General Ledger and Options

To use Multilevel Manufacturing, a linked **Fixed Cost Offset** GL account is required. It is highly recommended that this account be in the Cost of Goods area (as should a linked Manufacturing Labour Costs account). Using an account in the Cost of Goods area ensures that any offsets are accounted for within the current Profit and Loss period. If you are manufacturing over more than one accounting period, it is suggested that an Inventory GL account (non linked) should be used (Asset), but needs to be regularly reviewed and journalled out.

**Note:** The linked **Fixed Cost Offset** GL account should be monitored as it is the difference between the fixed cost you are nominating and the actual manufacturing cost. Ideally, it should always be close to zero.

Once the GL account has been created, link it via **Tools > Options > Accounts > Linked Accounts** to **Fixed Cost Offset** located under the Manufacturing section.

Manufacturing		
Manufacturing Labour Costs	57550	▼ Labour Manufacturing Offset
Fixed Cost Offset	57500	▼ Manufacturing Offset

Next, enable the actual use of multilevel manufacturing via **Tools > Options > Stock** and ticking **Allow Fixed Cost Manufacturing**.

Manufacturing

Include Labour in cost when Manufacturing

Allow Fixed Cost Manufacturing

## Setup – Stock

To enable Multilevel Manufacturing, add a new or edit an existing stock and tick multilevel (fixed) as per below:

This stock I		Unit	Tax	Manufacturing	
<input checked="" type="checkbox"/> Buy in	UNIT	G	10 %	<input type="radio"/> no	
<input checked="" type="checkbox"/> Sell in	UNIT	G	10 %	<input type="radio"/> single level	
<input type="checkbox"/> Service				<input checked="" type="radio"/> multilevel (fixed)	

Optionally, you can set a default Manufacturing Cost in the Details tab of the Stock screen, which will be the default cost used on a manufacturing job when manufacturing this stock.

Labour Content	0.00
Hide on Invoice	<input type="checkbox"/>
Manufact. Cost	100.00

The rest of the setup is the same as for normal manufacturing, eg. a linked Manufacturing Item will be created where you can add the specific stock codes that will be used in the manufacture process.

## Manufacturing Job

Once a stock is set up for multilevel manufacturing, you can add a job and select the related Manufacturing Item. If the stock code is SUB.ASSY1, then the linked Manufacturing Item would be SUB.ASSY1+.

The only difference from a standard (single level) manufacturing job is an additional **Cost** field.

Qty		Cost	100.0000	Location	QLD
-----	--	------	----------	----------	-----

It will be populated with the default cost specified in the manufacturing stock code (Details tab), and it will show the default cost of 1 unit. The cost can be changed at any time up until the point of clicking the **Manufacture** icon.

Regardless of how many products you are manufacturing, the cost figure is the cost to manufacture one unit.

The totals displayed on the Cost tab of the manufacturing job have been updated to display the total fixed cost, the estimated actual cost, and the difference. You would expect this difference to be posted to the linked **Fixed Cost Offset** GL account when you click the **Manufacture** icon.

## Changes to Journals

When completing a manufacturing job (moving to FINISH Status and selecting the **Manufacture** icon from the ribbon), the linked Fixed Cost Offset GL account will be used for the difference between the fixed cost set on the job and the actual cost of the stock codes used. For example, if all stock codes used in manufacturing are from purchase orders on 'Received', then the full cost will be offset.

When these purchase orders are set to FINISH, Jim2 will reduce the offset account by the cost of the stock, as example 2 below.

An important difference, compared to single level manufacturing, is that once the fixed cost stock is manufactured, its cost will not be affected by expense orders, thus enabling the stock codes to be used as parts in other manufacturing Jobs.

## Examples of Transaction Journals:

1. Stock was manufactured, and some of the purchase orders for the stock codes used in the manufacturing job are on 'Received' status.

Tran#: 199, PO, Date: 01/12/2017 04:32:25 PM (6), Manufacturing Purchase #49 (Job#148)				
49	1-1380	SOH - Sales - Systems	200.00	0.00
49	1-1340	SOH - Sales - Peripherals	0.00	60.00
49	5-7500	Manufacturing Offset	0.00	140.00
			200.00	200.00

In this case, the stock on hand account for Systems goes up by the cost determined by the manufacturing job (which creates a manufacturing purchase order). \$200 was set as the fixed cost on the manufacturing job. \$60 of stock was on 'Finished' purchase orders, and \$140 worth of stock was on 'Received' purchase orders.

2. When the 'Received' PO is moved to 'Finish' status, any difference in cost will remain in offset, so the difference between fixed and actual cost in this example is \$140 – \$127.50, leaving \$12.50 as a credit in the offset account, reflecting the lower actual cost:

Tran#: 201, PO, Date: 01/12/2017 04:36:12 PM (6), Manufacturing Purchase #49 (PO#48)				
49	5-7500	Manufacturing Offset	127.50	0.00
49	1-1340	SOH - Sales - Peripherals	0.00	127.50
			127.50	127.50

3. In the manufacturing purchase order below, all of the stock codes used in the manufacturing job, were on purchase orders on 'Finish' status. Using the same stock as in the previous example, you can see the flow.

Tran#: 203, PO, Date: 01/12/2017 04:41:21 PM (6), Manufacturing Purchase #50 (Job#149)				
50	1-1380	SOH - Sales - Systems	200.00	0.00
50	1-1340	SOH - Sales - Peripherals	0.00	187.50
50	5-7500	Manufacturing Offset	0.00	12.50
			200.00	200.00

4. In this example, an expense order (eg, linked freight expense) was applied to the stock codes used in manufacturing:

Tran#: 1152, POE, Date: 11/10/2017 10:55:24 AM (4), Breakup of Expenses on Purchase Order #11078, TECHDIST				
11078	1-1340	SOH - Sales - Peripherals	3.33	0.00
11078	1-1360	SOH - Sales - Software	6.67	0.00
11078	1-1500	Expenses on Purchases	0.00	10.00
			10.00	10.00

and again, the manufacturing account was debited by the linked expense amount:

Tran#: 1153, POE, Date: 11/10/2017 10:56:41 AM (4), Expenses on Manufacturing Purchase #11079 (PO #11080)				
11079	1-1560	Manufacturing Offset	10.00	0.00
11079	1-1340	SOH - Sales - Peripherals	0.00	3.33
11079	1-1360	SOH - Sales - Software	0.00	6.67
			10.00	10.00

### Fixed Cost Manufacturing Labour

Both single and multilevel manufacturing optionally allow the cost of labour to be included as part the total cost within the manufacturing process.

Manufacturing

Include Labour in cost when Manufacturing

Allow Fixed Cost Manufacturing

To allow labour to be considered as a cost of manufacture, **Include Labour in cost when Manufacturing** must be ticked, and the Linked Offset account set up.

**Note:** On the Details tab of manufactured stock, the cost of labour should be included in **Manufact. Cost**, along with the cost of any stock.

Labour Content

Hide on Invoice

Manufact. Cost

Any labour stock code that will be included in the manufacture will also need to have a **Manufact. Cost**, which represents the cost of providing one unit (normally an hour) of labour.

In the example below, a Labour stock code with a Manufact. Cost of \$175.00 has been included in the manufacturing job. The value of the manufactured stock code increases by the value set on manufacturing job, and the Labour Offset accounts and Inventory accounts are credited.

You can see the Journal flow below:

Tran#: 205, PO, Date: 06/12/2017 03:04:08 PM (6), Manufacturing Purchase #52 (Job#151)				
52	1-1380	SOH - Sales - Systems	300.00	0.00
52	5-7500	Manufacturing Offset	7.50	0.00
52	1-1340	SOH - Sales - Peripherals	0.00	132.50
52	5-7550	Labour Manufacturing Offset	0.00	175.00
			307.50	307.50

The Labour Offset will reduce the overall P&L expense for actual labour cost, as we are transferring this portion of wage expense to inventory value.

# CardFiles

CardFiles have been updated and include several new features and enhancements.

## New Invoice and Statement Options Available to Print & Email

A new additional CardFile level setting allows you to specify **Email & Print** on both invoices and statements. The available settings when generating an invoice or statement are:

- Print
- Fax
- Email
- Don't Send
- Email & Print

You'll find this setting on the Customer tab of the CardFile in the **Send Statement via** and **Send Invoice via** selection boxes.

## Restrict CardFile Contact Types to the Names Listed in Setups

A new option under **Tools > Options > CardFile** allows you to limit the contact type that can be used to the ones listed under **Tools > Setups > CardFiles > Contact Types**.

## Nominate Multiple Email Contacts for Invoicing, Statements, Purchases, etc.

When emailing out of Jim2, a hint is passed through indicating who should receive that email. For example, Email Invoices, or Email Statements. You can now add these Email contact types to multiple CardFile contacts, and the email will be sent to all those contacts.

For example: CardFile SAMPLE

Contact 1:John Smith	Email Invoice	john.smith@sample.com
Contact 2:Mary Brown	Email Invoice	mary.brown@sample.com

In the above example, invoices will be emailed to both John and Mary.

The following email types support this new functionality:

- EMail Accounts.
- EMail Creditors.
- EMail Debtors.
- EMail Invoices.
- EMail Photocopier.
- EMail Purchases.

For more information on this topic refer to [http://jim2help.happen.biz/cardfile\\_contact\\_types.html](http://jim2help.happen.biz/cardfile_contact_types.html)

## CardFile Ship Cards Tab

New Ship Cards tab displays all related shipping CardFiles (and contact details). This table can be filtered and sorted. You can also double click (or right click) to view and/or edit the related Ship CardFile.

## CardFile Level Backorder Setting

A new CardFile level Backorder setting allows to you set how a customer wants to handle backorders. They can nominate to only receive full orders, without any items on backorder.

The new Backorder setting is located on the Customer tab of a CardFile and has the following options:

- Allow Backorders.
- No Backorders (Supply Available).
- No Part Ship (supply requested Quantity).

The Available Stock screen will indicate the customer's nominated backorder setting.

Available Stock

**Warning. Customer is flagged as :  
No Backorders (Supply Available)**

Stock:  Location:

Qty on hand:  UNIT  
Qty picked:  UNIT  
Qty committed:  UNIT  
**Qty available:**  UNIT  
You requested:  UNIT  
**Qty in advance:**  UNIT

This stock I want to  
 Supply in advance  
 Supply from committed on earlier Jobs  
 Supply only available (backorder the rest)  
 Supply only available (no backorder)  
 Backorder all  
 None of the above

Supply Qty will be changed to Qty available and balance will be backordered.

Location	Description	QtyOnHand	Qty Avail
NSW	NSW Office	0	

OK

The default option Backorder setting can be overridden at point of generating the Backorder by ticking **Acknowledge** as per below:

Create Back Order ?

**Warning. Customer is flagged as :  
No Backorders (Supply Available)**

Acknowledge

Create Backorder Job for Stock not supplied ?

Copy comments from original Job  
 Copy emails from original Job

Yes No

## Items – Assign Users Based on User Groups

Items have been updated to make use of the new User Groups functionality. You can now specify who an Item can be assigned to based on individual users and/or users within specific User Groups as per below:

Editing Service Item - ONSITE □ ×

Code	<input type="text" value="ONSITE"/>	Description	<input type="text" value="Onsite Service"/>		<input checked="" type="checkbox"/> Active
Make	<input type="text"/>	Default Name	<input type="text"/>	Job Type	<input type="text" value="Service"/>
Model	<input type="text"/>	<input type="checkbox"/> Default Name Only	<input type="checkbox"/> Hide Comments on Jobs		

Serial No.	Invoice Description	MPS
<input type="radio"/> Assign Job# to Serial # <input checked="" type="radio"/> Leave Serial # blank	<input type="checkbox"/> Display Serial # <input type="checkbox"/> Serial # is required	<input checked="" type="checkbox"/> Display Invoice description <input checked="" type="checkbox"/> Invoice description required

Groups	...
--------	-----

User / User Group	Initials	CardCode
<b>Users</b>		
<b>Active</b>		
<input type="checkbox"/> Frank Lampard	FL	FRANK
<input type="checkbox"/> Greg Tegal	GT	GREG
<input type="checkbox"/> Happen Business Pty Limited	HB	HAPPEN
<input checked="" type="checkbox"/> Harry Rednapp	HR	HARRY
<input type="checkbox"/> Jole Cole	JC	JOLE
<input type="checkbox"/> Michael Carrick	MC	MIKE
<input type="checkbox"/> System administrator	SYS	SYS
<b>Inactive</b>		
<b>Tags</b>		
<b>Level One Technician</b>		
<input checked="" type="checkbox"/> Frank Lampard	FL	FRANK
<input checked="" type="checkbox"/> Greg Tegal	GT	GREG
<b>Level Two Technician</b>		
<input checked="" type="checkbox"/> Jole Cole	JC	JOLE
<b>Categories</b>		
Service		
Accounts		

Create Similar
✖ Cancel
Save
Save & Close

<b>Stock Total \$</b>	0.0000
<b>Tax \$</b>	0.0000
<b>Total \$</b>	0.0000

Item
Stock



# Stock

## Stock Stats Total Cost Summary

The Stock Stats tab now includes cost summary and footer totals.

## Stock – Flag as Inactive

A new security setting is now available to disable users marking stock as Inactive. This security setting can be set in Security Groups via **Tools > Security > Stock > Allow flag stock as Inactive**.

## Stock – Stock Select

The Stock Select screen includes a new selection criterion to include text within stock Detailed Descriptions when searching. To include detailed descriptions in search results tick **Include Detailed Desc**.

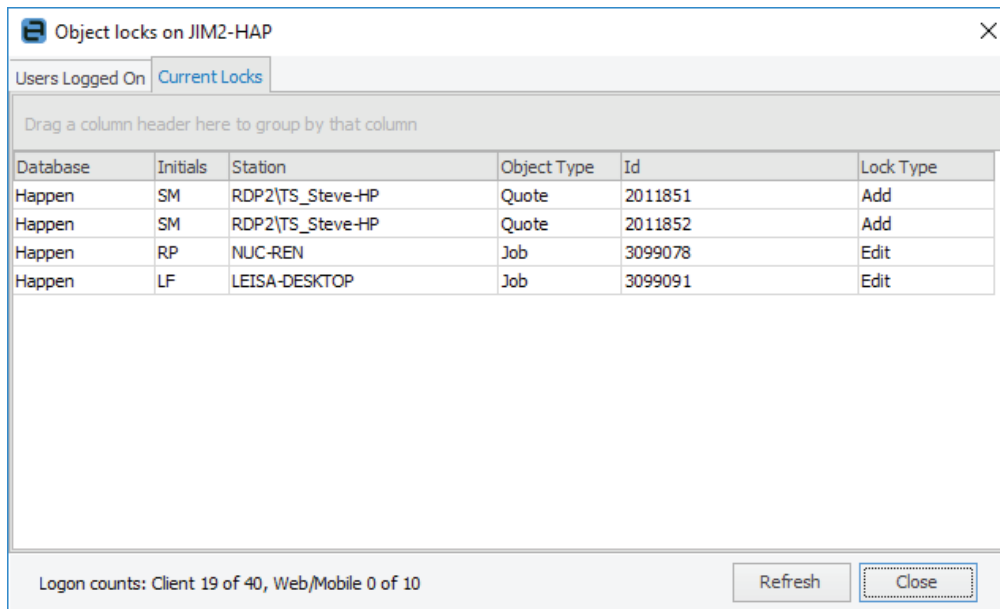
# User Interface

## List Count Increased – 25

The maximum number of Lists (Job, Quote etc) has been increased from 20 to 25 for each object in the Nav tree.

## Current Locks

You can now see active locks (add, edit, etc.) via **Jim2 > Logged Users** and clicking on the **Current Locks** tab.



The screenshot shows a window titled "Object locks on JIM2-HAP" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "Users Logged On" and "Current Locks", with "Current Locks" being the active tab. Below the tabs is a grey area with the text "Drag a column header here to group by that column". Below this is a table with the following data:

Database	Initials	Station	Object Type	Id	Lock Type
Happen	SM	RDP2\TS_Steve-HP	Quote	2011851	Add
Happen	SM	RDP2\TS_Steve-HP	Quote	2011852	Add
Happen	RP	NUC-REN	Job	3099078	Edit
Happen	LF	LEISA-DESKTOP	Job	3099091	Edit

At the bottom of the window, there is a status bar with the text "Logon counts: Client 19 of 40, Web/Mobile 0 of 10" and two buttons: "Refresh" and "Close".

## Search Jim2

The Search Jim2 function now allows for searching for text within the stock's detailed descriptions.

This includes the following fields; Short Desc., Detailed Desc., and Warranty fields

Refer to [http://jim2help.happen.biz/jim2\\_user\\_interface\\_search.html](http://jim2help.happen.biz/jim2_user_interface_search.html) for more detailed shortcuts in regard to Search in Jim2.

# Email

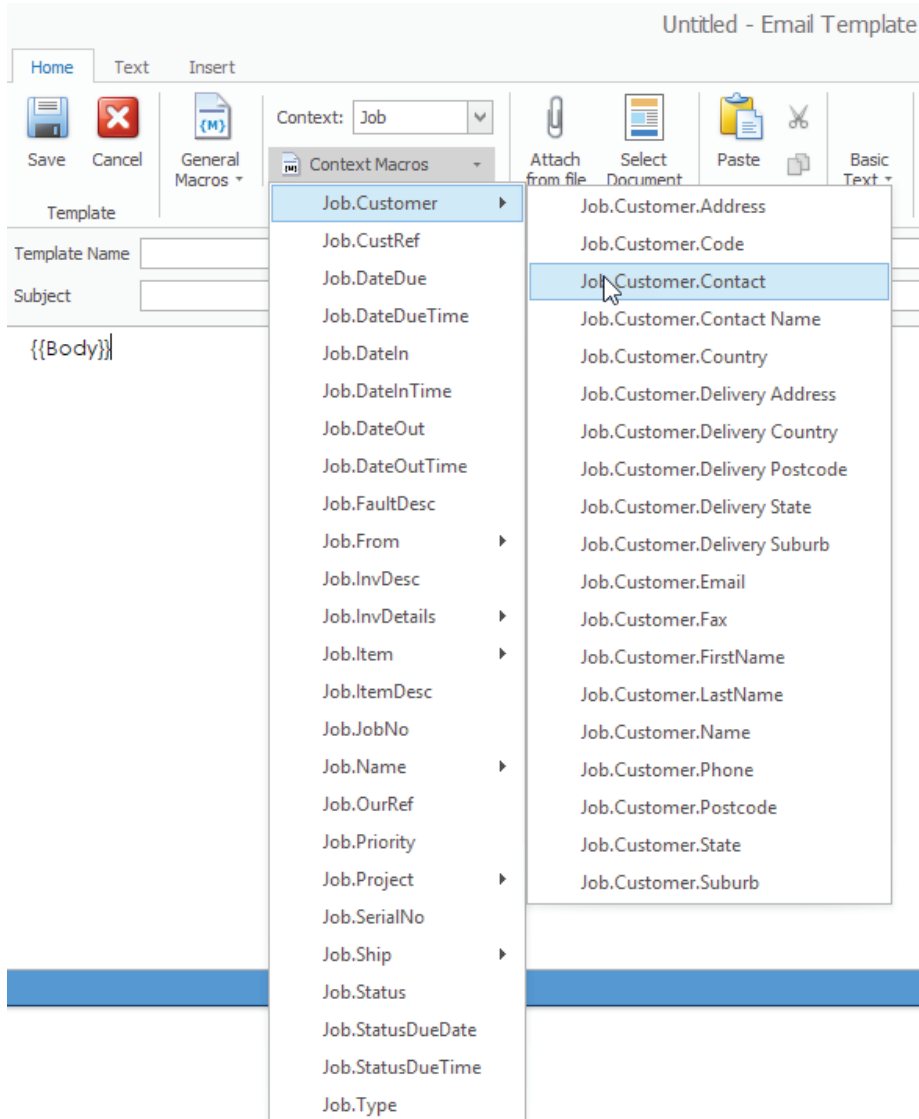
## Email List – Create Purchase Order or Expense Order

You can now right click on an email from within an Email List and create a purchase order or expense order. The email will be automatically linked to the created purchase/expense order.

From an email within an Email List, right click and select **Create** and then select either **Purchase Order** or **Expense Order**.

## Email Templates – Reorganised Macros

The selection of macros within Email Templates has been simplified within Job and Quote context macros, with available selections now logically grouped.



Several additional macros are also now included.

## Email Templates – Copy an Existing Email Template

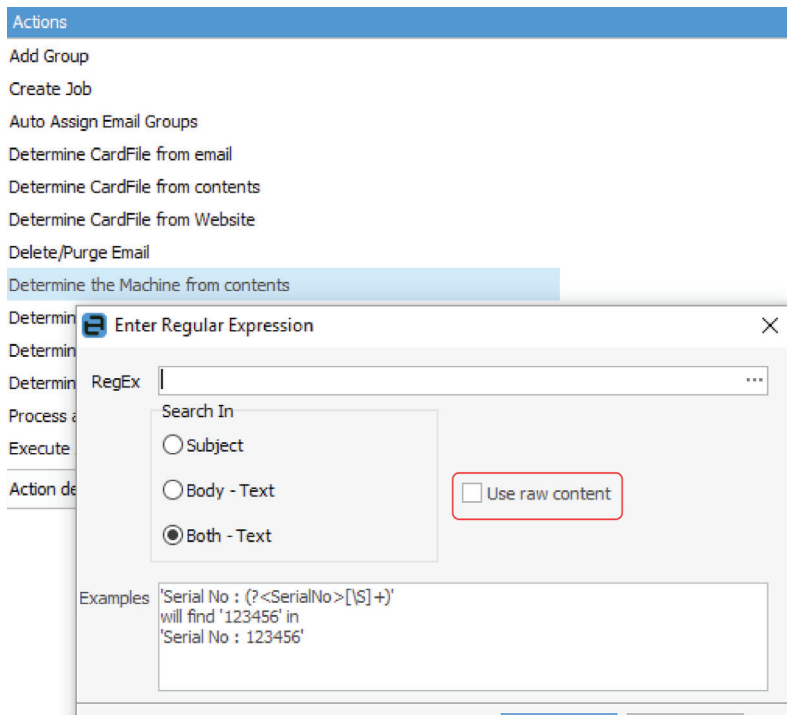
The new feature allows you to create a new email template from an existing one. From **Email > Email Templates**, select a Template and click **Copy**. A new Email Template based on the selected one will be created.

## Email Rules – Decoded Text

A new option allows email actions to be applied to an email's 'decoded' text within the Email Actions window. Decoded text is a 'text' version of an email with all HTML markup, etc. stripped out. This greatly simplifies the process of extracting information from an incoming email – looking for a serial number, for example, which typically requires the use of a complex Regular Expression.

By default, Email Rules will always be applied to the decoded text. To use the raw email content, tick **Use raw content** when entering your Regular Expression.

**Note:** Existing Email Rules are not affected by this new option, and will continue to use the raw email content unless changed.



The decoded text that the email action will be applied to is available directly from an email within Jim2 by opening the email, clicking **Properties**, and selecting the **Email Body – Text** tab.

## Email Rules – New Email Action 'Execute Script'

A powerful new Email Action 'Execute Script' allows execution of a server-side Powershell script for a given email.

This functionality allows access to the Jim2 API (as used by Jim2 Mobile), and allows almost anything to occur on receipt of an email. Jim2's Scripting Engine has been updated to provide creation and editing of Powershell scripts via the new Server script type.

Example use:

Based on a given set of conditions applied to an email, run a Powershell Script via the Execute Script action and create a job programmatically, as required.

This functionality is currently limited to internal use by Happen, but provides an incredibly powerful method to enhance email and business process automation on behalf of our customers.

## Email Rules – New Email Action 'Process with MPS Connector'

A new Email Action 'Process with MPS Connector' allows an email to be qualified and passed through for processing via an MPS Connector.

Moving forward, this is the preferred way of receiving and processing meter collection emails – and the configuration and setup of email at an MPS Connector level is no longer required.

## Email Editor – Updated Properties

Jim2's Email Editor has had several updates, including an updated Properties function. Opening an email and clicking on Properties now provides the following tabs.

Tab	Explanation
General	Basic properties of the email including Subject, Email Id, Message Id, Received date, etc.
SMTP Headers	The email's SMTP Headers.
Email Body – Raw	The raw text of the email including HTML, etc.
Email Body – Text	The decoded text of the email body. Useful for working out email rules, etc.

# Regional Settings

Given that Jim2 is in active use in many countries, several new regional related settings have been introduced.

The Start Up Wizard, initiated when starting a new Jim2 database, now provides selection of the following countries:

- Australia
- New Zealand
- South Africa

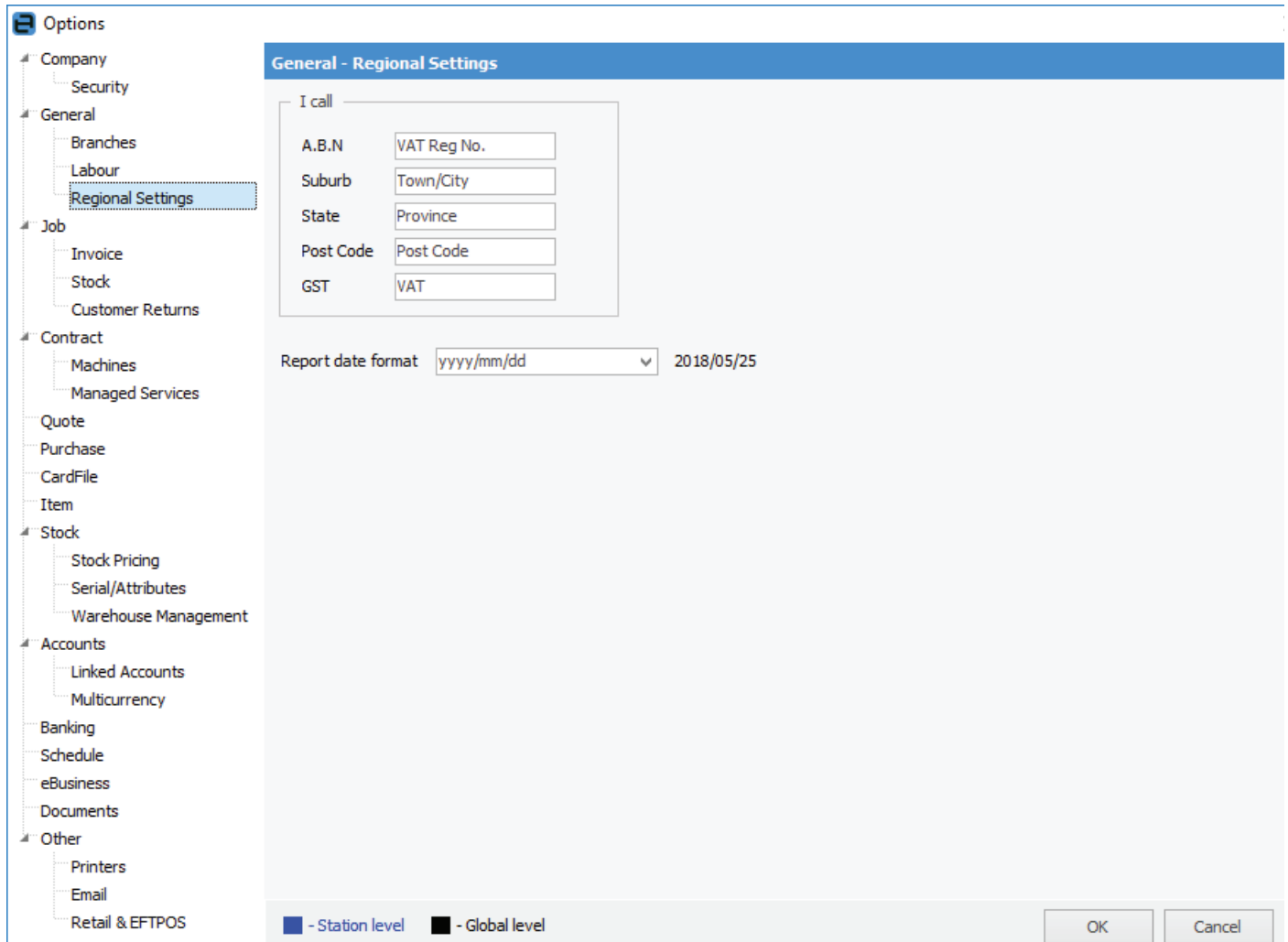
Options now include a new Regional Settings tab that allows renaming of several regional based settings including:

- A.B.N.
- Suburb
- State
- Post Code
- GST
- Report Date format

These options can be configured via **Tools > Options > General > Regional Settings**.

Additionally, the actual method of GST/VAT calculations for a specific country can be configured via **Tools > Options > Accounts** and selecting **GST Country** from the dropdown box.

All references to currency symbol \$ are now as per the default home currency.



# Managed Print Services Edition

The following features and enhancements relate to users of Jim2 Managed Print Services Edition.

## Daily Rate-Based Meter – New

A new Daily rate-based meter allows billing a daily rate (funny enough), ideally suited for short term rentals, etc.

The billing of the Daily rate-based meter takes into account the contract start/end dates, if set.

The Daily rate-based meter can be used alone, or with any other meter combination.

For example:

Meter Type	Per	Rate
Black	Black copy click	\$0.0150
Colour	Colour copy click	\$0.0600
Daily	Day	\$10.0000

To use a Daily rate-based meter, a Non Depleting or Journal stock must be set up. Under the **Projects** tab, the **Meter Type** needs to be set to **Daily**.

## Base Rate Meter – New

A new Base Rate meter allows a fixed quantity of charges per billing run. This is effectively the same as the Daily rate-based meter type, but allows a fixed quantity to be billed per billing run. The quantity billed can be also be entered if billed manually.

## Consumables Pane

The speed of the Consumables Pane has been greatly increased, and now runs in its own background thread.

## Miscellaneous Features and Enhancements

### Schedule – Saturday/Sunday

For customers who work seven days a week, a new option allows Saturday and Sunday to be display individually, rather than combined.

To enable this feature click **Tools > Options > Schedule** and tick **Show Saturday/Sunday as separate columns**.

### Debtors List – Account Manager

Debtors List now provides the ability to filter by Account Manager.

### Invoice – Payments

The Invoice Payment screen now includes additional function keys to select payment types. Function keys **F4** through to **F10** are now automatically assigned to Payment Method selection.

**Note: F11** is now the function key to complete an Invoice **OK (F11)**.

### Job – Cust# selection

When accessing the CardFile Selection screen via the ellipsis, the Search tab will now automatically be selected **if** the current Cust# is default as assigned by **Tools > Options > Job > Cust#**

### Jim2 Server

Jim2 Server is now much faster at backups where native SQL compression is available (eg. full versions of SQL, and not the Express editions). Backup speed when compressed is typically three or more times faster.

### Performance

- The Jim2 Client now uses considerably less memory, and is much faster at loading and refreshing lookups.
- Auto Credit Hold is now server side, and runs automatically as required.
- Jim2 Server is much faster at backups when using full versions of SQL.
- The speed of the Consumables Pane has been greatly increased, and now runs in its own background thread (MPS Edition).

## Updated Security Settings

The following additional security settings have been added:

### Security > Stock

- Allow flag stock as Inactive.

### Security > Tools

- Allow viewing History.

### Security > Tools > Groups > Users

- View.
- Manage.

### Security > Templates

- View Template Estimate Amount.

**Note: Please make sure you update your users' security settings as required.**

## Updated Options

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

### Options > General > Branches

- Allow invoicing Jobs from multiple Branches.
- Set default Stock Location from – From Branch.
- Set default Stock Location from – Ship Branch.

### Options > General > Regional Settings

- I call A.B.N.
- I call Suburb.
- I call State.
- I call Post Code.
- I call GST.
- Report date format.

### Options > CardFile

- Statement via (new Email & Print selection).
- Invoice via (new Email & Print selection).
- Allow only Contact Types specified in Setups.

### Options > Stock

- Manufacturing – Allow Fixed Cost Manufacturing.

### Options > Accounts

- GST Country.

### Options > Accounts > Linked Accounts

- Fixed Cost Offset.

### Options > Schedule

- Show Saturday/Sunday as separate columns.