Jim2® Business Engine Workflow

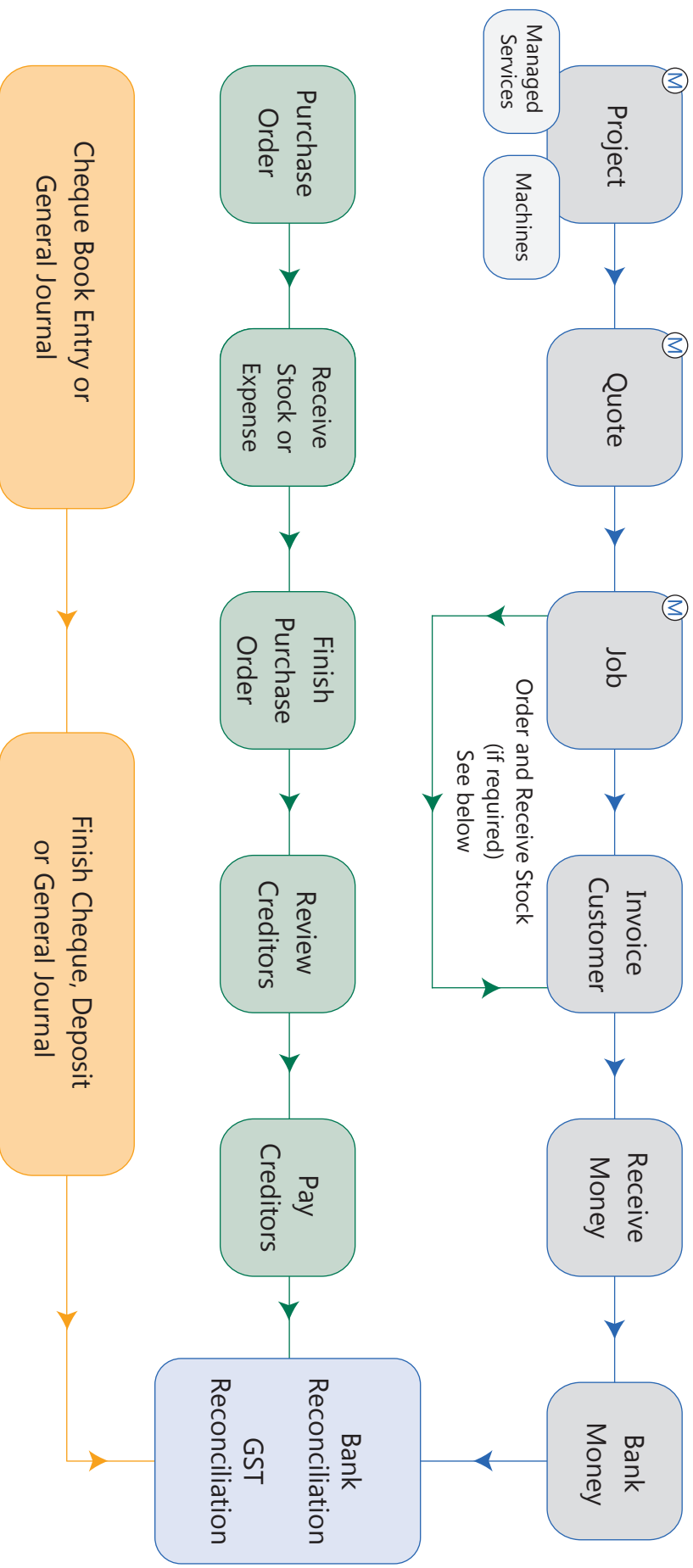**Need to add first:** Logo, Chart of Accounts, Stock Codes, CardFiles, Internal email accounts, folders and tags

Workflow

Project (M) → Quote (M) → Job (M) → Invoice Customer (M) → Receive Money → Bank Money → Bank Reconciliation / GST Reconciliation

- Managed Services
- Machines

Order and Receive Stock (if required) See below

Purchase Order → Receive Stock or Expense → Finish Purchase Order → Review Creditors → Pay Creditors → Bank Reconciliation / GST Reconciliation

Cheque Book Entry or General Journal → Finish Cheque, Deposit or General Journal → Bank Reconciliation / GST Reconciliation

Email (M)
Email: Quotes, Job Reports, Purchase Orders, Management Reports, Invoices, Statements, Remittances, Deposit Requests, Receipts

Scheduling (M)
Scheduling: Quotes, Jobs, Purchase Orders, Meetings, Phone Calls, Debtor Follow ups, Sick Leave, Holidays

Documents (M)
Documents: Quotes, Jobs, Purchase Orders, CardFiles, Stock, Debtors, Creditors, Vendor Price Lists, Reports, Pictures.

(M) – Accessible on Jim2® Mobile