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Jim2® Business Engine
Version 4.1 (all editions)

Release Notes

Jim2® Business Engine v4.1 Release Notes – 21/08/17

Welcome to Jim2 Version 4.1 – 'Unified Billing & Cloud'

Jim2 v4.1 introduces new features and functionality designed to streamline and further enhance internal processes. Our Projects (contracts) feature now has the ability to fully customise and automate client billing jobs with dynamic stock 'Kits' and 'Hide' functionality. No more editing billing jobs to suit a specific product or client's requirements. The creation of completely customised billing jobs is now fully automated.

Another major feature is the ability to save and publish/push Lists to users' Jim2 Mobile or Desktop client. New users are no longer exclusively required to initially set up lists. Company workflow processes can be pushed out and locked down to users within specific groups with ease.

By combining Published Lists and Project Templates, this enables you to develop strict workflow processes to suit a broad range of project scenarios. Drive the completion of specific jobs within a project using project templates, and publish job lists to staff to structure steps within a process that requires multiple skillsets.

Other features include a new, updated 'Outlook 2016' look and adaptive layout, the long awaited super Comments grid, Scheduler improvements, List enhancements, expanded Jim2 Mobile functionality, and more.

We are excited to announce Jim2 v4.1 is now Cloud enabled and available across multiple devices, with many 'under the hood' changes specifically designed to enhance usage within Cloud and On-Premises environments.

IMPORTANT: For Managed Services and Managed Print Services Edition users:

Be sure to read the **Getting Started in Jim2 v4.1** section of these release notes **PRIOR** to upgrading to Jim2 v4.1. There are a number of updates to the billing processes that should be understood prior to upgrading. Click on the blue heading below to jump to that section.

Technical Changes [Page 6](#)

- New Cloud and On-Premises 'Bootstrap' startup
- New splash and login screens
- New adaptive layout
- Updated installer with SQL 2016 Express support
- Microsoft SQL Server 2005 and 2008 no longer supported
- Microsoft SQL Server 2008 R2 will work, however it is no longer supported by Microsoft
- Windows Server 2008 no longer supported
- Windows Server 2008 R2 (includes MS SBS Server 2011) can be used with the latest service pack and .NET installed.
- Windows 7 and prior no longer officially supported
- SQL database mirroring not supported
- eBusiness Service and eBusiness Meter Reads
- Ability to suppress version warning messages

User Interface [Page 9](#)

- New clean, flat 'Office 2016' appearance
- New 'colourful' skin mode – now 4 skin options and 5 accents
- Navigation Tree – double click on object to expand/collapse
- Search in much more specific areas than before
- GL Account Code lookup

Jim2.Cloud [Page 12](#)

- Full Jim2 client delivered by RemoteApp within Microsoft Azure
- Managed Server and geo-replicated backup
- Subscription-based pricing model
- New Jim2.Cloud RemoteApp Client

General [Page 13](#)

- New Comments grid with filter, search and grouping capability
- Spell checker in comments and labour entry
- New 'Find' function
- New web-based online Jim2 Help File
- Scheduling improvements



Lists Page 20

- New next/previous object navigation controls
- New 'Find' function
- Reports can now be run from Lists when a refresh time has been set
- Publish and lock down lists to specific users or groups
- Updated date/time selector with enhanced relative dates and names
- Date and status date overdue filters
- List Security
- Structure/Create Published Lists
- Manage Published Lists

CardFiles Page 29

- Ship Suburb and Att fields size increase

Documents Page 30

- Add Document Options
- Bulk link document to stock
- Bulk upload to add URL
- Can now be added as a URL to a network location
- Improved document match handling
- Paste from clipboard to add document

Email Page 32

- Bulk email from card, job and project list enhancements
- Delete email address
- Email to SMS functionality
- New column additions
- Now possible to send related email from a CardFile
- Search within email summary for emails attached to jobs
- Email attachment handling improvements
- Email Rules Project Template support
- Email Rules Recipient Contains can be restricted to TO and/or CC
- Alternating email templates
- Tagging objects to email

Job Page 36

- Changes to Date In and Date Due on backorder jobs
- Job Priority can now have a sort order
- Manufacturing job now shows availability

Job List Page 37

- Customer background highlighted red when on credit hold
- Job List Status Due Date updated

Purchase Orders Page 37

- Allow filtering by name
- Add Name to purchase orders
- Now ignores journal stock when applying expenses

Stock Page 38

- Inactive stock no longer added to jobs or quotes when using 'Create Similar'
- History tab added to the stock selection screen
- Increased visibility of issues with supplying stock
- Stock in Advance and Availability changes

eBusiness Page 39

- Dynamic Supplies new feeds format
- eBusiness has updated Dynamic feeds
- Dicker Data new URL connection
- Vendor Stock Feeds – Support for URL downloads
- eSend PO's now has comment added to PO comment grid when a PO is sent electronically

Reporting and Report Designer Page 41

- New and updated reports, including contact email export report
- Stock profit and Top X management reports expanded with ability to save and export raw data to Excel
- XLSX support
- Add images to reports

Miscellaneous Enhancements Page 43

- Add labour via XML no longer supported
- Debtors/Creditors now shows cash GST Session#
- Dispatch now gives the ability to set the Ship Ref# at the job level from the Dispatch list
- Enhancements to data import
- Jes Notify Module
- Job/stock: stock in advance and availability changes
- Object history – ability to return last 'X' modifications to a given object
- Stock Procurement – takes into account Manufacturing jobs
- Jim2 will require an updated version of the PCEFTPOS Server.
- Tyro – Jim2 will allow cancelling Tyro EFTPOS payments halfway through a transaction

Managed Services Page 45

- Full Dynamic Kit Support
- Project Templates – new template functionality for flexible creation of any job type
- Billing total in Project and Project lists
- Prepaid labour contract enhancements

Managed Print Services Page 78

- Customisable CSV MPS Connector
- Non-Billing Project Template capability
- Service request supports service meter reads
- Net Overs and Net Clawback fields now available on invoice
- Meter Read tab improvements
- QR barcode
- Machine Job Templates
- New Machine Contract Creation

Jim2 Mobile Page 87

- New Stock screen tabs – prices, quantity on hand (also by attributes), purchase statistics
- Invoice element on job – quickly access invoice reports from job screen
- Ability to edit multicurrency on jobs and quotes
- New options (for stock list and lookup) Default Currency and Display Price Level
- Ability to add labour via timers to manufacturing jobs

Jim2 Server Page 89

- Backup – Daily with hourly incremental, and upload Azure option
- Configurable Jim2 Server temporary working (backup) directory

Options Page 92

- New and updated
- SMTP – SSL and STARTLS authentication added to default SMTP options

Security Page 98

- New and updated
- Enhanced Account Manager Security

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 v4.1

Things to know prior to upgrading

Typically, Jim2 v4.1 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 for versions prior to v4.0 has now ceased. If you are currently running any v3.X build, please contact Happen Business to obtain instructions before upgrading.

Anti-Virus Exclusions

It is recommended that the primary Jim 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\steve.morris\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 RS and SBS2011 if not running the latest .NET)
- Windows Installer 4.5 must be installed
- Windows Server 2008 R2 or above with .NET 4.6.2 or above
- SQL Server 2012 R2 or later (Note: SQL Server 2008 R2 will work, however it is no longer supported by Microsoft)

Microsoft SQL Server

- Jim2 now also supports SQL 2016.
- 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

Managed Services Edition: Billing Templates

The upgrade process will migrate stock lines ticked as billing from your existing project's 'Default Stock' tab to a new Billing Template format. Please take the time to read the Managed Services section of this document so you are aware of what has taken place during the upgrade, and how the look and operational aspects of the Managed Services Edition have changed.

Note: By default, the Default Stock tab on projects is hidden from users. To have the tab show to users, go to **Tools > Options > Project** and tick '**Display Default Stock (Legacy)**'. You will need to log out and back in before the tab will be displayed.

This should only be necessary if you are using custom scripts for pricing. For all other uses, this tab is now meaningless.

Managed Print Services Edition: Non-Billing Templates

The upgrade process will identify any machine contract's 'Default Stock' tab that has stock configured for Onsite, Workshop and Consumable jobs.

When found, a machine specific project job template will be created that is then used during the applicable job creation process.

This ensures users can create Jobs for machines with no change to normal behaviour, post upgrade. However, stock for these types of jobs is no longer managed within the Default Stock tab, as they are now configured within the new Project Templates.

Within the Managed Print Services section of this document we have detailed how to use the project template 'Merge' function to consolidate large quantities of project specific Consumable, Onsite and Workshop job templates into single consolidated templates (where applicable). This allows you to take advantage of the new project template inheritance, and further minimise the time to administer changes to contracts with the same stock, quantity and pricing.

Conclusion

You should find that Jim2 v4.1 will install quickly and easily without any issues. Please contact Happen Business if you have any Jim2 installation issues.

Features and Enhancements – All Editions

Technical Changes in Jim2 v4.1

The following section details technical changes in Jim2 v4.1.

New Cloud and On-Premises Bootstrap Start

In all previous versions of Jim2, it was recommended that users run the Jim2 executable from a shared network directory.

Although not obvious to users, the new v4.1 shared Jim2.exe is actually a bootstrap program which, when run, establishes whether the user has a matching version of Jim2 installed locally (on the user's computer or terminal server session). If not found, a new version is copied down to a location on the user's PC.

One of the primary reasons for the introducing this new functionality was to address network related issues (External exception C0000006) being experienced by some of our clients running Jim2 from the shared executable. The new approach resolves this error, thus providing greater stability and enhanced startup speed.

Jim2 Client Location :

C:\users\USERNAME\AppData\Local\Happen Business\LocalJim2

*Default location for networked users

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

*When used on a Terminal server, requires additional Jim2Service to run on the Terminal Server

*Executable & Install Instructions available to download here – <http://files.happen.biz/downloads/Jim2ClientService.zip>

When running Jim2 for the first time, or after an upgrade on the Jim2 Server, you will notice an indicator on the splash screen preparing Jim2, whilst the new version of Jim2 is copied down.



Jim2 bootstrap service for Terminal Servers

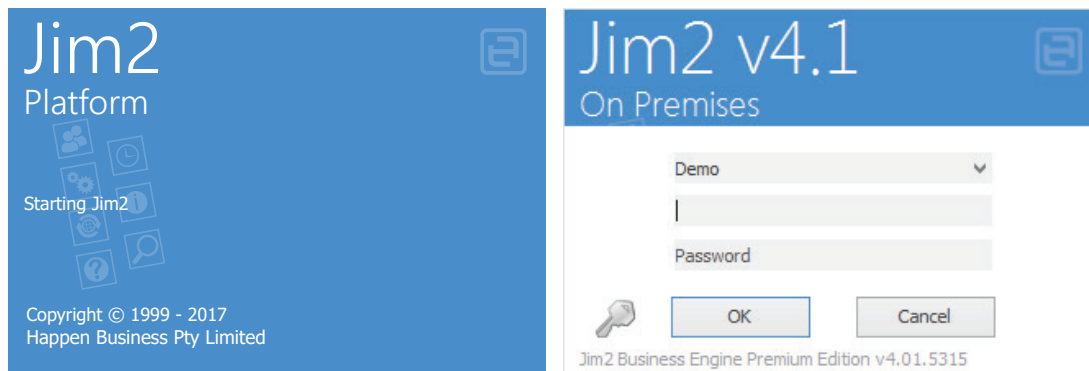
This will mean only a single shared copy of Jim2 v4.1 is copied down to the terminal server for all users to access. Users should still be pointed to the shared Jim2.exe on the Jim2 Server to start Jim2.

On the terminal Server, logged in with full administrative privileges:

1. Create new folder: c:\Program files\Happen business\Jim2LocalService\
 - Jim2LocalService.exe
 - Jim2LocalService.exe.config
2. Extract contained files to the new folder created in step 1.
3. From a command prompt with elevated privileges, run the following from within the new directory:
Jim2LocalService -install
4. Start the service and ensure it is set to 'Auto Start'.

New Splash and Login screens

The splash and login screens have been updated with the introduction of Jim2.Cloud. From a user perspective, this is essentially an aesthetic change only.



New Adaptive Layout

The new adaptive layout improves the general look of each Jim2 object and list filter navigation, and enables Jim2 to better adapt itself to different screen sizes to maintain continuity within the display.

Previous look:

Viewing Sales Job 112

Job#	112	Cust#	DAYCOM	Status	FINISH	Price level	4	Name	HR
Cust Ref#	34	From#	DAYCOM	Priority	Normal	Qte Req.	<input type="checkbox"/>	Acc.Mgr	
Mode	ACTIVE	Ship#	DAYCOM	Type	Normal	Tax Paid	<input checked="" type="checkbox"/>	Tax Total	Tax Paid Down
Date In	20/07/2014	Due	26/07/2014 05:00PM	Modif.	20/07/2014	Ex.Job#	...		
Item#	SYS.SALE	Desc.	System Build						

Invoice Desc.

	Date	Initials	Status	Inc.	Comments
1	20/08/2014	HR	FINISH	<input type="checkbox"/>	
2	20/08/2014	HR	Booked	<input type="checkbox"/>	

New look:

Viewing Service Job 16 The Modem Company ✕

Job#	16	Cust#	MODEM.COMP	Status	FINISH	Price level	4	Name	JC
Cust Ref#	101	From#	MODEM.COMP	Priority	Normal	Qte Req.	<input type="checkbox"/>	Acc.Mgr	
Mode	ACTIVE	Ship#	MODEM.COMP	Type	Normal	Tax Paid	<input checked="" type="checkbox"/>	Tax Total	Tax Paid Down
Date In	01/07/2008	Due	06/08/2013 01:43PM	Modif.	27/09/2016	Ex.Job#	...		
Item#	MOD.TIGER.56	Desc.	Tiger 56K Modem		Serial#	1875			
				Status Due					
Project#		Contract		Type		Location			
Fault Desc.	Rework								

Information about Windows 7 and Server 2008 and Server 2008 R2 when installing Jim2 v4.1

Attempting to install Jim2 v4.1 Server on Windows 7 or Server 2008 R2 (includes MS SBS Server 2011) will fail if the operating system is not fully patched. The very latest service packs and most up-to-date version of .Net Framework must be installed.

The following are no longer supported in this release:

- Microsoft SQL Server 2005 and 2008
- Windows Server 2008 Standard is not supported and cannot be used with Jim2 v4.1
- Windows 7 and prior (Jim2 will run, but is not officially supported on Windows 7). Microsoft ended mainstream support of Windows 7 SP1 on 14 January 2015.

SQL database mirroring is not supported

While this has never been supported, Jim2 v4.1 will not install if SQL database mirroring is enabled.

eBusiness Service and eBusiness Meter Reads

Post installation of Jim2 v4.1, the Jim2 eBusiness website must be refreshed using the [JEF installer](#), otherwise users will receive errors when performing tasks such as meter read entry.

Warning Message Suppression

By adding the following global variables, the warning messages in relation to older versions of SQL and Windows operating systems will stop the messages being shown to users when logging in to Jim2.

Name: SuppressSQLVerMsg Value = True

Name: SuppressWindowsVerMsg Value = True

This is done via **Tools > Global Variables**, 'Add'.

The screenshot shows the 'Jim2 Variables' dialog box. It contains a table of variables and a form for editing a specific variable.

Name	Type	Value	Comment
StatementAgingMethod	String	Period	Default selected Aged Method in Statement reports
StatementExcludePrepaymentsInDueNow	Boolean	False	Exclude prepayments in total due on or off by default in :
StatementHideDueNow	Boolean	False	Hide Due Now on or off by default in Statement reports
StatementHideFullyPaidCurrent	Boolean	False	Hide fully paid current Invoices on or off by default in Sta
StatementHidePayments	Boolean	False	Hide Payments on or off by default in Statement reports
StatementInListLogoLeft	Float	20	Debtors Statement in List Report. Default Logo Left Value
StatementInListLogoTop	Float	-1	Debtors Statement in List Report. Default Logo Top Value
StatementLogoLeft	Float	20	Debtors Statement. Default Logo Left Value = 20
StatementLogoTop	Float	-1	Debtors Statement. Default Logo Top Value = -1
SuppressSQLVerMsg	Boolean	True	
Use Old Master Summary	String		Flag to use Old Master Summary. 1 for True
UseAttributeSplitting	Boolean	False	For Length & Width Attributes. Adds Total Qty to each str
UseHideFlagOnAttributes	Boolean	True	Gives ability to override the Hide flag on Attributes (True
UseInvoiceCompanyName	Boolean	True	When UseInvoiceNoEmailFilename is On, Override attach

Below the table, the details for the selected variable 'SuppressSQLVerMsg' are shown:

Name: SuppressSQLVerMsg
Type: Boolean
Value: True
Comment:

At the bottom of the dialog are buttons: Add, Edit, Delete, Hide, Display Text, and Close.

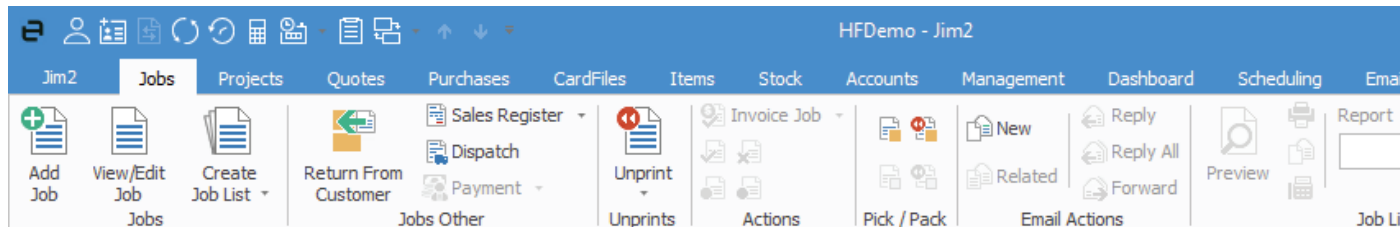
New Functionality in Detail

User Interface Enhancements

The following section details the user interface (UI) changes in Jim2 v4.1.

New Clean, Flat 'Office' Appearance

Jim2 v4.1 sports a new clean, flat 'Office 2016' user interface. While we have aesthetically enhanced Jim2, the layout of the ribbon tabs and icons remains the same.



Skin Colour and Accent

Jim2 v4.1 includes the new 'colourful' skin mode.

The new interface supports 4 new 'skins' and five 'accents'.

Skin Colour	Accent Colours
Light Grey (Colourful)*	Blue *
Dark Grey (Colourful)	Green
Light Grey	Orange
Dark Grey	Purple
	Black

The four new skins are as follows:

- Light Grey (Colourful)*
- Dark Grey (Colourful)
- Light Grey
- Dark Grey

The five existing skin accents being:

- Blue *
- Green
- Orange
- Purple
- Black

* Default skin and accent

Why would you want different skins and accents?

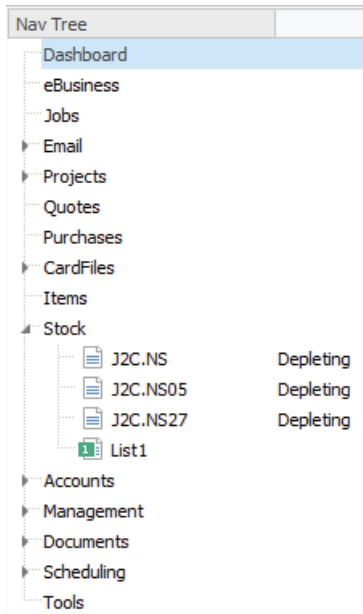
The skin/accent combination is a database level setting. Apart from your own personal preference, the main purpose of setting a skin and accent is to distinguish one database from another. Typically, this is your 'main' database vs your 'training' database, or in the case of running multiple companies (and multiple Jim2 databases), distinguishing one company from another.

Setting a Skin and Accent

The database skin and accent is set via **Tools > Options > General**. The 'training' skin/accent combination is used if this database is restored as your training database.

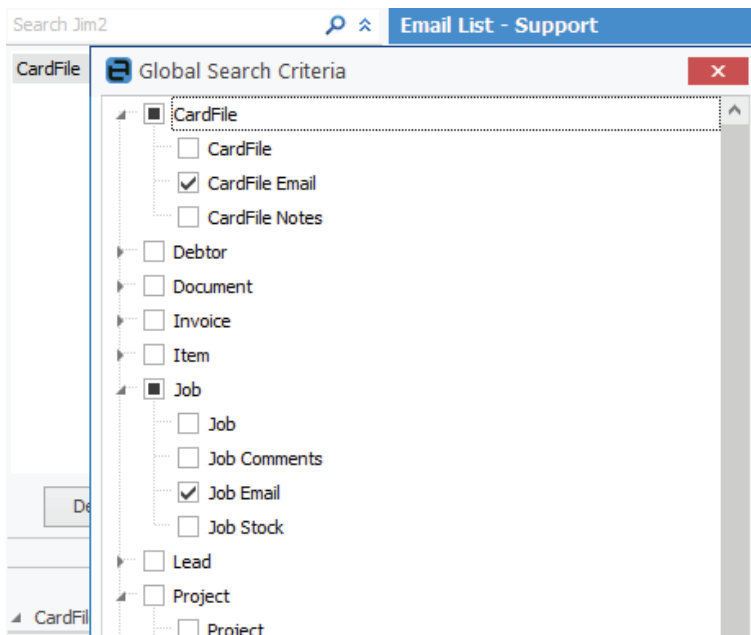
Navigation Tree Focus

To tidy the navigation tree (Nav Tree) and focus on one object list, double click on the object heading to expand its view. This will simultaneously collapse all other object views within the Nav Tree.



Jim2 Search

The Search field has been enhanced to allow you to refine your search to much more specific areas than before.



As shown in the example above, you can specifically search related emails from the search bar. Simply select  beside the search field.

You will also notice that Jim2's [search](#) function is now much faster.

GL Account code lookup

GL Account Select screen search has been updated to search both GL code and account name fields for your entered text. Previously, users were required to select which one to search. This is currently available in:

- Expense PO
- General Journal
- Cheque/Deposit
- Budgets
- Account Enquiry

Adding Cheque 3607

Tran# 3607 ☐ Handwritten Type Cheque

Card Code ... Date 24/02/2017 GL Acc. 11110 National Australia Bank Account

Payment By Electronic Funds Transfer

Cheque No 150720171

Chq Amt \$ 20.00

Twenty Dollars only

Comment *Invalid per Licence*

Acc.Code ...

GL Account Select

Enter text to search... Clear

GL Code	Account Name	Tax Code
1 - Assets		
11110	National Australia Bank Account	X
11120	Petty Cash	X
11130	Bartercard	X
11160	Debtors Clearing Account	
11170	National Australia Bank Business Saver Account	X
11180	Building Society Savings Account	X
11210	Borrowing Costs	
11290	Less Prov for Doubtful Debts	
11330	Hire equipment	G
11500	Expenses on Purchases	
11551	Stock On Hand - POs On Received postable	
11610	Loan Account - Albury Business Centre	X
11615	Loan account Superannuation	X
11620	Loan Account #1	X
11630	Goodwill	X
11640	Loan Account - Chris and Jo	X
11645	Loan Account - Jo	X
11646	Loan Account - Chris	

Cancel Cheque

Cheque

OK Cancel

Jim2.Cloud

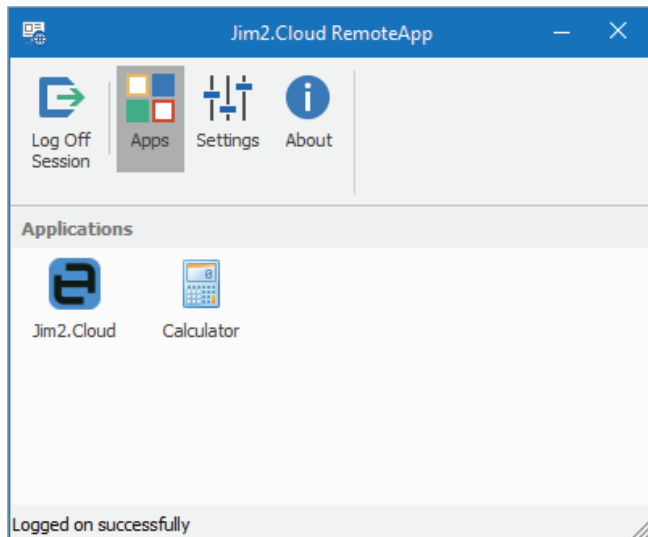
Jim2 v4.1 is now Cloud enabled, with many 'under the hood' changes specifically designed to enhance usage within Cloud and On Premises environments.

Our aim with Jim2.Cloud was to provide a similar experience to the existing Jim2 client, but delivered and accessed via the cloud. Developed over the last two years, we have created and tuned an impressive backend infrastructure and cloud environment, and are happy to say Jim2.Cloud is now in daily use by hundreds of happy new and existing clients.

Jim2.Cloud RemoteApp

Jim2.Cloud uses the latest in Microsoft RemoteApp technologies found in Server 2016, and is hosted on the Microsoft Azure platform. RemoteApp is used to deliver the full Jim2 Client to PCs, Macs, iOS, and most other tablet and mobile devices.

We have developed **Jim2.Cloud RemoteApp**. This no-setup application provides a great cloud experience and quick and simple login from any of the above devices.



Proactively Maintained

The Jim2.Cloud environment, housed within the Microsoft Azure Datacentres, offers the highest levels of redundancy and failover to make Jim2.Cloud readily available to users.

Jim2.Cloud includes daily backups with geo-replication to ensure that your Jim2 data is safe and available when the need arises.

All upgrades, patching, monitoring and maintenance are performed by Happen with the same great support our customers continue to compliment us for.

Access on Demand

Only a truly flexible system matches a flexible and mobile team. Access Jim2.Cloud anywhere, anytime using the Jim2.Cloud appropriate Microsoft RemoteApp client and a quality internet connection. Manage your business from desktop, laptop, or tablet while at the office, the airport, a café, or at home.

Pay as you Grow

Tailor your software subscription to match your expanding team, adding new named users to your subscription as your business grows. With Microsoft SQL licensing included in the subscription, combine software licences, upgrades, server maintenance and backups in the Jim2.Cloud monthly subscription package. Savings straight to the bottom line. No need for that new server, server upgrade, Microsoft SQL licensing, or associated ongoing support costs.

Existing Users – Don't Panic!

For existing clients interested to find out more about Jim2.Cloud and it's new licencing model, contact your account manager to discuss the change from on premises to cloud for your business.

We will continue to sell, implement, and support both new and existing customers with Jim2 On Premises and its subscription model. Whilst we believe Jim2.Cloud is the way the world is heading, there is no pressure nor requirement to move to Jim2.Cloud.

It is important to note that Jim2.Cloud is a cloud-enabled version of the Jim2 client delivered via the cloud as an App, and so development work now, and moving forward, applies equally to both.

Important: Windows 7 Users

If you have been able to connect via your Windows 7 Desktop without issue you can ignore this alert.

Before the new client can be used with Windows 7 the following Windows Updates must be installed on any Windows 7 computers. While Windows 7 is no longer officially supported, by installing these optional updates Windows 7 will work with the new environment.

<https://support.microsoft.com/en-gb/help/2574819/an-update-is-available-that-adds-support-for-dtts-in-windows-7-sp1-and-windows-server-2008-r2-sp1>

<https://support.microsoft.com/en-gb/help/2592687/remote-desktop-protocol-rdp-8.0-update-for-windows-7-and-windows-server-2008-r2>

<https://support.microsoft.com/en-gb/help/2830477/update-for-remoteapp-and-desktop-connections-feature-is-available-for-windows>

<https://support.microsoft.com/en-gb/help/3080079/update-to-add-rds-support-for-its-1.1-and-its-1.2-in-windows-7-or-windows-server-2008-r2>

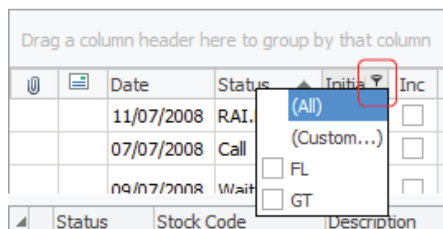
General

New Comments Grid with Filter, Search and Grouping Capability

Jim2 v4.1 now features a new Comments grid with filter, search and grouping capabilities. The new grid gives far greater control over how the grid data is presented and viewed.

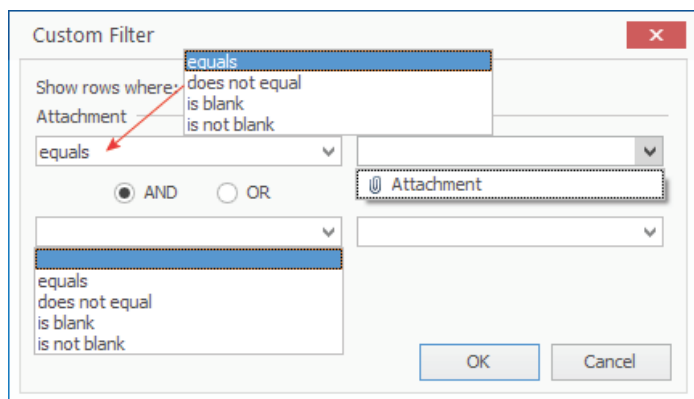
Filters

Within the Comments grid, hover over a heading and you will see the Filter image appear. Click on the image to see a list of available filters that help you to refine your search, ie. filter by a user to see only their comments. This is particularly useful when there are many comments within the grid. These filters will only show comments specific to the filter you choose.



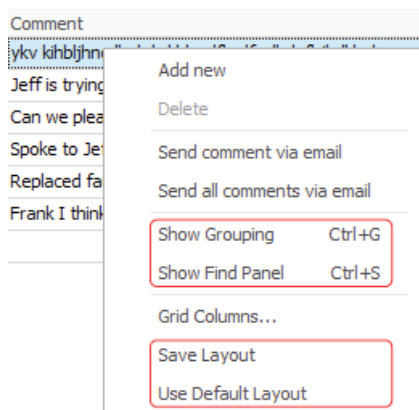
Custom Filter

The Custom Filter choice allows you to define your search further:



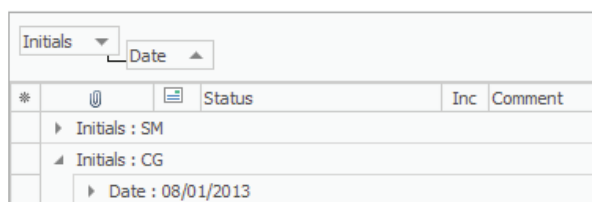
Find Panel and Grouping Options

To access the new find panel and grouping options, right click on any Comment grid column heading:



The available right-click menu now has four new options:

Show grouping – Adds the familiar List grouping option to the Comment grid so users can group by all available grid columns. (Ctrl+G)



Show Find Panel – Enables the search panel, and gives the user the ability to search text within the grid. (Ctrl+S)

Enter text to search...

Find

Clear

Drag a column header here to group by that column

*			Date	Initials	Status	Inc	Comment
---	--	--	------	----------	--------	-----	---------

Save Layout – Saves the current Comments column configuration. Note: administrators will be asked if they want to update the 'Default Layout' for all users. Once saved, this will become the default layout.

Drag a column header here to group by that column

*			Date	Initials	Status	Inc	Comment
1			11/07/2008	GT		<input type="checkbox"/>	Spoke to Anthony they have ordered 5 new monitors but what they want is not it is worth the wait.
2			09/07/2008	GT	Wait	<input type="checkbox"/>	Anthony will get it for me not it is worth the wait.
3			07/07/2008	FL	Call	<input type="checkbox"/>	Internal fuse box
4			04/07/2008	GT	Booked	<input type="checkbox"/>	

+

Status

Stock Code

Description

Unit

C

1

Add new

Delete

Send comment via email

Send all comments via email

Copy CellCtrl+C

Copy RowCtrl+Alt+C

Copy AllShift+Ctrl+Alt+C

Show GroupingCtrl+G

Show Find PanelCtrl+S

Grid Columns...

Save Layout

Use Default Layout

Use Default Layout – Reset your grid layout to its default layout, as set by the Jim2 administrator.

Drag a column header here to group by that column

*			Date	Initials	Status	Inc	Comment
1			11/07/2008	GT		<input type="checkbox"/>	Spoke to Anthony they have ordered 5 new monitors but what they want is not it is worth the wait.
2			09/07/2008	GT	Wait	<input type="checkbox"/>	Anthony will get it for me not it is worth the wait.
3			07/07/2008	FL	Call	<input type="checkbox"/>	Internal fuse box
4			04/07/2008	GT	Booked	<input type="checkbox"/>	

+

Status

Stock Code

Description

Unit

C

1

Add new

Delete

Send comment via email

Send all comments via email

Copy CellCtrl+C

Copy RowCtrl+Alt+C

Copy AllShift+Ctrl+Alt+C

Show GroupingCtrl+G

Show Find PanelCtrl+S

Grid Columns...

Save Layout

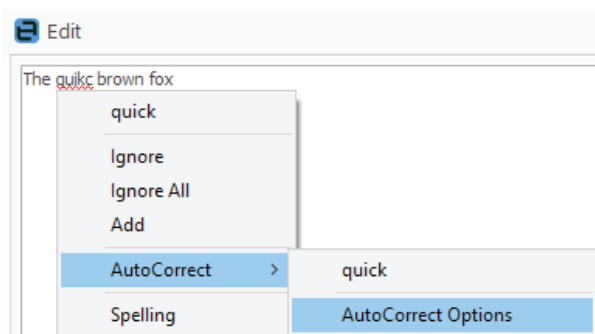
Use Default Layout

Spell Checker in comments and labour entry

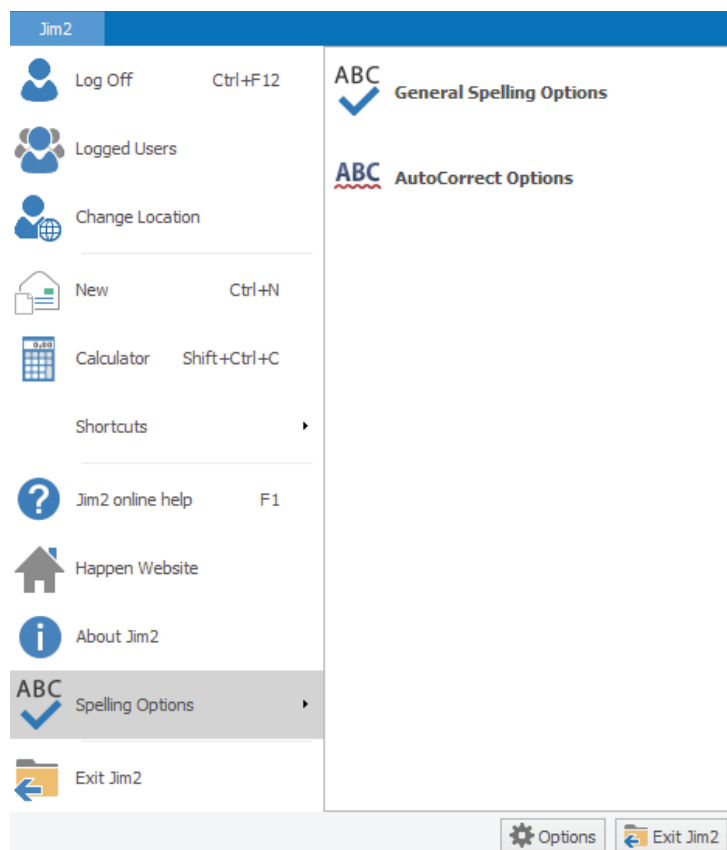
Spell checker now features within key text areas of Jim2, such as the Comments grid and email editor. A red squiggly line identifies words that may have been spelt incorrectly, producing a list of suggested replacements to select.

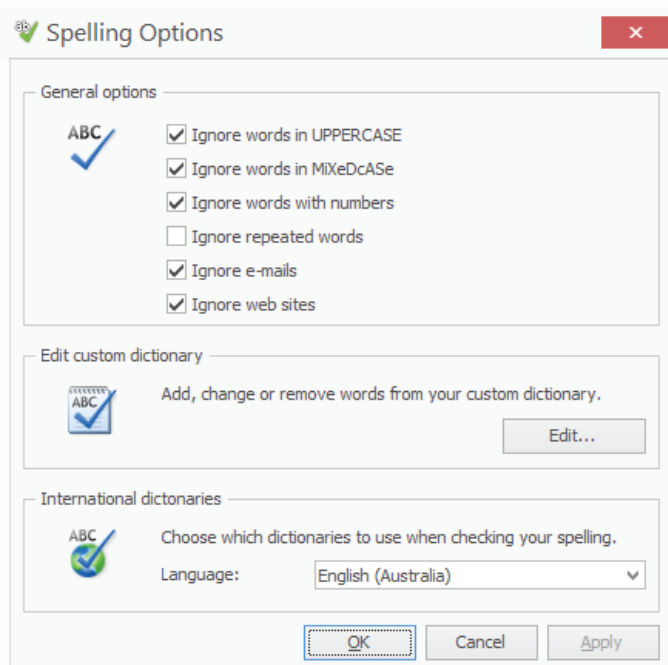
Jim2 now also features a range of AutoCorrect options which can be quickly adjusted. Note that all settings for Spelling Options are set at a user level.

Change your spelling options whilst using the spell checker by right clicking within the edit screen:



Or go to the Jim2 menu and select Spelling Options.





Spelling Options

General options

☒ Ignore words in UPPERCASE

☒ Ignore words in MiXeDcAsE

☒ Ignore words with numbers

☐ Ignore repeated words

☒ Ignore e-mails

☒ Ignore web sites

Edit custom dictionary

Add, change or remove words from your custom dictionary.

[Edit...](#)

International dictionaries

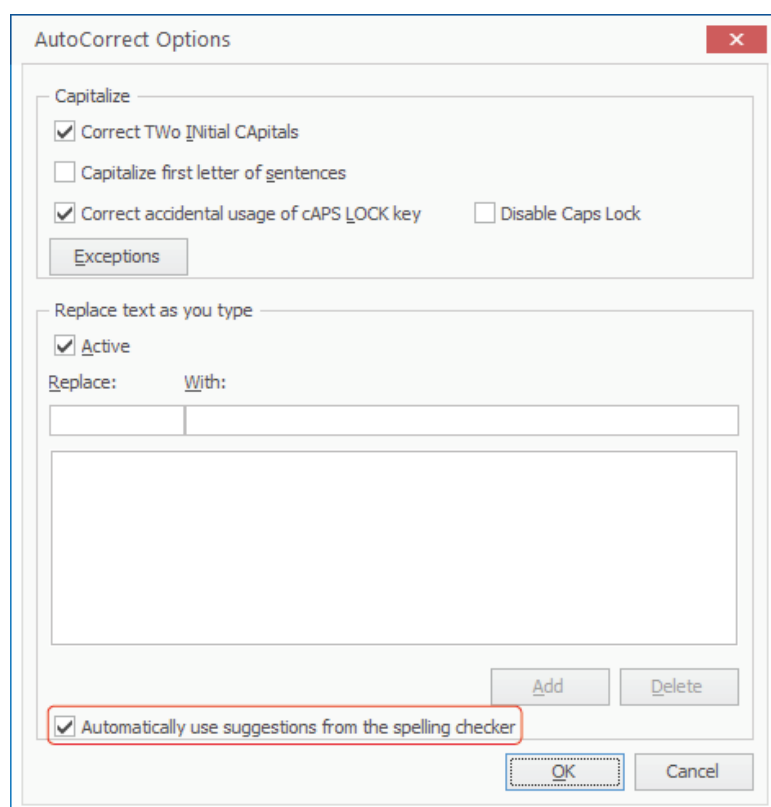
Choose which dictionaries to use when checking your spelling.

Language: English (Australia)

[OK](#) [Cancel](#) [Apply](#)

You will find a number of AutoCorrect options available, to customise your spell check experience. Also, among the new AutoCorrect options you have the ability to turn on the 'Automatically use suggestions from the spelling checker' function by ticking it.

Note that AutoCorrect is off by default.



AutoCorrect Options

Capitalize

☒ Correct TWo Iñitial CAPitals

☐ Capitalize first letter of sentences

☒ Correct accidental usage of cAPS L_OCK key ☐ Disable Caps Lock

[Exceptions](#)

Replace text as you type

☒ Active

Replace: Wjth:

[Add](#) [Delete](#)

☒ Automatically use suggestions from the spelling checker

[OK](#) [Cancel](#)

Jim2® Online Help

The Jim2 Help File is now web enabled. With a new 'clean flat' look, the Help File continues to be accessible from the Jim2 menu (**F1**) and continues to deliver content-specific information that relates to what you are working on in Jim2.

The new online format enables you to bookmark important pages, send key information to other users, and read new content the moment it's published.

Jim2 Online Help can be found at <http://jim2help.happen.biz>, by hitting **F1** within Jim2, or clicking on the Jim2 button in the ribbon and selecting Help from the menu.

The screenshot displays the Jim2 Online Help web application. On the left, a search bar contains the keyword 'backup', and a list of search results is shown. The first result, '1. Best Backup Practices', is highlighted. The second result, '2. Scheduled Backup', is also visible. The third result, '3. Jim2 Server Scheduled Backup Fails', is the selected item, and its content is displayed on the right. The content includes the title 'Example situations where backups can fail' and two sub-sections: 'Using a mapped drive (eg S:\backups)' and 'When using a UNC path (eg \\server\backups)'. A context menu is open over the URL at the bottom of the page, with the 'Copy' option highlighted. The context menu also includes options like 'Undo', 'Cut', 'Paste', 'Delete', 'Select All', 'Right to left Reading order', 'Show Unicode control characters', and 'Insert Unicode control character'.

Jim2 Help

Navigation: *Trouble Shooting*
Jim2 Server Scheduled Backup Fails

Enter one or more keywords to search ('*' and '?' wildcards are supported):
backup Submit

Sorted by relevance / Sort by date
Result Pages: 1 2 3 Next >>

1. Best Backup Practices
Scheduling a backup ensures that there is always a copy of work separated from the main data files. Manual backups allow for incidental backups to...
Terms matched: 3 - Score: 719 - 10 Mar 2017

2. Scheduled Backup
This tab allows you to view any existing scheduled backup settings, and to set up Jim2 Server so it will perform scheduled backups.
Terms matched: 3 - Score: 450 - 10 Mar 2017

3. Jim2 Server Scheduled Backup Fails
Example situations where backups can fail Using a mapped drive (eg S:\backups) If drive S: is mapped to \\server\share for the logged on use...
Terms matched: 3 - Score: 221 - 10 Mar 2017

Permissions for Local Disk (C:)

Security

Object name: C:\

Group or user names:

- Authenticated Users
- SYSTEM
- Administrators (NUC-STU\Administrators)
- Users (NUC-STU\Users)

Add... Remove

Permissions for Users

Allow Deny

Undo
Cut
Copy
Paste
Delete
Select All
Right to left Reading order
Show Unicode control characters
Insert Unicode control character >

We have also included an easy way to copy a URL from the 'help browser' into an email, etc. You will see the web link on the bottom left hand side of the screen.

Navigate the Help File using the table of contents, keyword index, and search topics sections. The keyword index is now much more comprehensive, and will continue to be expanded into the future.

Jim2 Online Help includes this release's updates, and is regularly published with new and enhanced content.

Scheduling Improvements

Preview

Hovering your mouse over any entry in the Schedule will bring up detailed information within the preview. This relates to jobs and meetings etc.

Due Job Active

Job #3085905 - Professional Services - Jim2@ Training JL, GR

Due Job Active #3086285

Due Job Active

Due Job Active #3086208

Due Job Active

Due Job Active #3086273

Job #3085905 - Professional Services - Jim2@ TrainingJL GR

Start: 26/05/2017 10:30 am

Finish: 26/05/2017 12:30 pm

Status: Proceed

Cust/Ship: Advance Knowledge

Priority: Normal

Cust Ref: NIL

Fault Desc: Training - Jobs

Ship Addr: 9 Smith Street Mortdale NSW 2223

Due Date

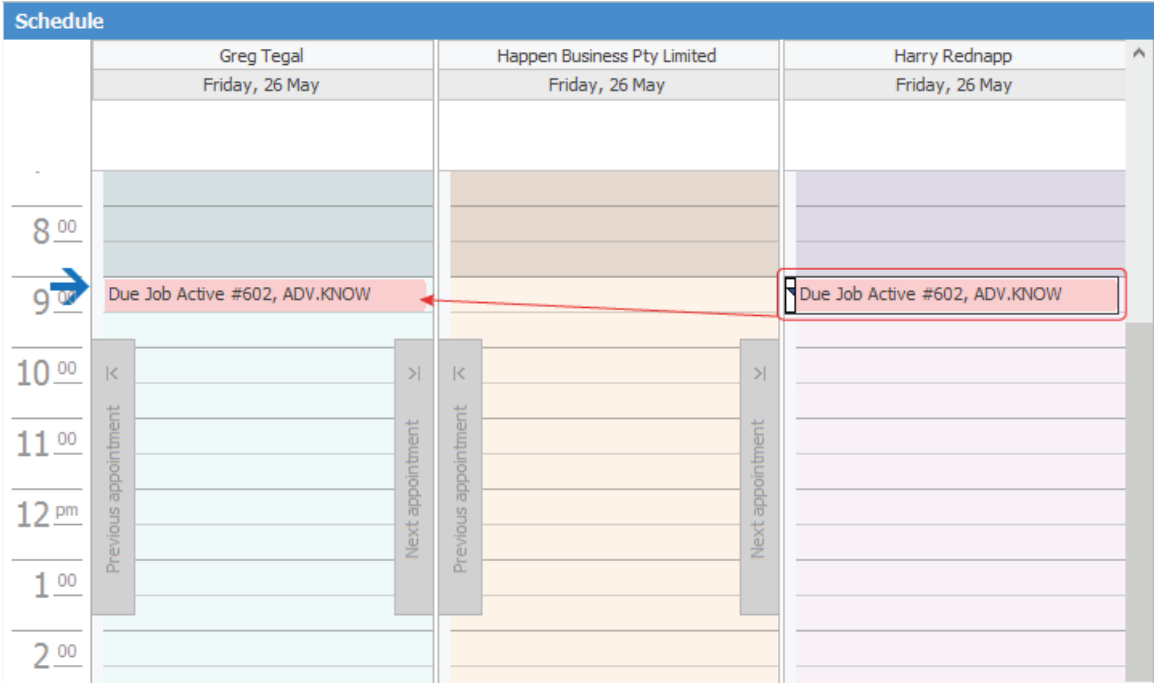
You can now double click an entry to open a job directly from within Scheduling.

Drag a Due Job Active Task in Scheduling to another date/time and it will update the job's due date appropriately.

Schedule			
Unassigned		System administrator	
Monday, 24 April		Monday, 24 April	
			12:00am Due Job Active #292, Al
Thursday, 27 April		Thursday, 27 April	
Previous appointment	Tuesday, 25 April	Friday, 28	
Wednesday, 26 April		Wednesday, 26 April	
Saturday, 29 April		Saturday, 29 April	

Reassign Due Job Active

Drag a Due Job Active in Scheduling to another person, and the Name assigned will change to that person.

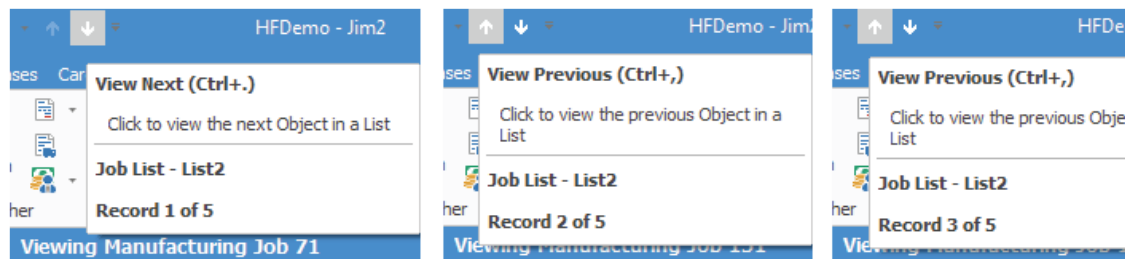


Security to perform this function is determined by a user's access to edit their jobs and scheduled tasks and access to edit other users jobs and scheduled tasks. This is set via **Tools > Security**.

Lists

List Previous/Next

Within an object that you have opened from a Job, Purchase, Document, Stock, Project, Quote or CardFile list, these two arrows become active, allowing you to scroll through to the next or previous object within the list.

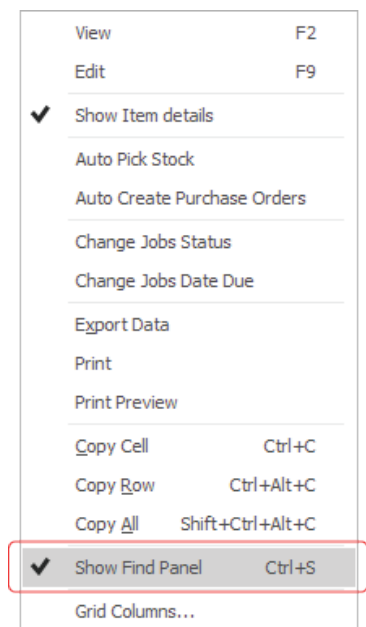


Shortcut keys for these items are:

- Ctrl+>** moves to the next object in the list
- Ctrl+<** moves to the previous object in the list

New Find function

The find panel is available from object lists, in addition to the comments grid. Right click anywhere within a list to bring up the menu, left click and select **Show Find Panel**.



Once selected, the Search panel will be displayed at the top of the list.

Enter a search value and the list display will be dynamically updated to show only the list objects that match. This is great for quickly finding things like a specific job based on its fault description within a large list of jobs.

Before:

Enter text to search... Find Clear										
Drag a column header here to group by that column										
	Pick	Job# ▲	Project#	Contract	Status	Mode	Cust#	Cust Ref#	Item#	Fault Description
	<input type="checkbox"/>	103			Booked		MODEM.COMP	130	MOD.TIGER.56	No Dial tone
	<input type="checkbox"/>	104			Booked		MODEM.COMP	130	MOD.TIGER.56	No Dial tone
	<input type="checkbox"/>	105			FINISH		OATLEY.TAF	HILDA	ONSITE	Server down.
	<input type="checkbox"/>	107			FINISH		DAYCOM	SUPPORT	ONSITE	PC Anywhere Support
	<input type="checkbox"/>	109			FINISH		OATLEY.TAF	ER	SALE	
	<input type="checkbox"/>	110			FINISH		OZ.INDUST	34	SYS.SALE	

After:

<input type="text" value="warranty"/> <input type="button" value="Find"/> <input type="button" value="Clear"/>									
Drag a column header here to group by that column									
<input type="checkbox"/>	Pick	Job #	Project #	Contract	Status	Mode	Cust #	Cust Ref #	Fault Description
<input type="checkbox"/>	113				Booked		DAYCOM	SYS.P3	Processor is Dead
<input type="checkbox"/>	119				Booked		DAYCOM	SYS.P3	Processor is Dead
<input type="checkbox"/>	161				Booked		DAYCOM	JANELLE	SYS.P3
									Warranty work on system

Running Reports from Live Lists

It is now possible to run Reports from live lists once a refresh time has been set.

Jim2

Projects

Accounts

Stock

Quotes

Purchases

Documents

eBusiness

Management

Jobs

CardFiles

Items

Dashboard

Schedule

Add Purchase

View/Edit Purchase

Create PO List

Return To Vendor

Unprint

Pick / Pack

New

Related

Email Actions

Reply

Reply All

Forward

Preview

Print

Email

Fax

Report

PO List - By Vendor

PO List - By Vendor

Purchase Order List Reports

Report dropdown remains active when a refresh time has been set

Search Jim2

Nav Tree

Count

Projects

Accounts

Stock

Quotes

Purchases

Documents

eBusiness

Management

Jobs

CardFiles

Items

Dashboard

Scheduling

Email

Tools

List1

3

Purchase Order List - 1

PO#

Vend#

Status

Name#

Our Ref#

From#

Type

Mode

Ship#

Vend Inv#

Currency

Vend Grp

Branch

SubBranch

GL Dept

Drag a column header here to group by that column

PO#	Status	Type	Mode	Vend#	From#	Vend Inv#	Date	Our Ref#
95	Booked	Expense		INGRAM	INGRAM		02/12/2016	
98	Booked	Purchase		SUB.CON.1	SUB.CON.1		09/12/2016	
100	Received	Purchase	Packed	COMP.WHOL	COMP.WHOL		13/12/2016	

Add

Edit

View

Run

Cancel

List

Advanced List

3

List1

Jim2 Published Lists

Administrators can now create and push a predefined set of lists to a particular user or group, which is key to using Jim2 as a workflow tool. This functionality is ideal to push lists to Jim2 Mobile-only users, without the need to log in as each user to reconfigure, add or edit their lists.

Key benefits to the business:

- lock down company workflow processes, ensuring specific users or groups cannot remove specific lists;
- enable fast start user setup without the need to individually log in and configure a new user's lists;
- quickly set up lists for mobile-only users – administrators can now add, edit and remove lists for Jim2 Mobile-only users with ease.

Workspace Enhancements to Facilitate Published Lists

Updated Date/Time picker

The Date/Time picker found within the advanced filter options for lists has been updated to include an increased number of relative date options – 'This week till ...', '...Till This week', and many more – to help users refine custom list date selections.

Today ▸

This Week ▸

This Month ▸

This Quarter ▸

This Financial Quarter ▸

This Year ▸

This Financial Year ▸

Month ▸

Quarter ▸

Financial Quarter ▸

Yesterday ▸

Last Week ▸

Last Month ▸

Last 30 Days ▸

Last Quarter ▸

Last Year ▸

Last Financial Quarter ▸

Last Financial Year ▸

Clear

▼

Cust G

This Week

This Week till...

...till This Week

Relative Names

Relative names have been introduced to assist the new Published List functionality. Options include a variable value based on logged on user, or explicit value, as per previous versions of Jim2.

Name: SYS ▾

Acc. Mgr: MC ▾

Active: ☒

Finish: ☒

Value will be the CardFile for the logged on User

Name: SYS ▾

Acc. Mgr: MC ▾

Active: ☒

Finish: ☒

This explicit value will be used for this search field in a published list

Relative Dates

When 'Today' is selected in List header fields, the date will automatically update to the current date. Grey text indicates that this is a chosen date from the drop-down menu. Black text indicates that an actual date has been entered.

Job List - My Jobs			
Job#		Cust#	
Cust Ref		From#	
Inv#		Ship#	
Item			
Item#		Serial#	
Make		Model	
Projects			
Project#		Contract	
Groups			
Price Lev.		Qte#	
Date In>	09/02/2017	Due>	
Date In<	09/02/2017	Today day	
This Week			
This Month			
Stock/Parts			
Order#			

Due Date and Status Overdue filters

Using the new overdue job filters, you can now create lists to watch for any job that is overdue based on the due date and status due dates.

Job List - 1														
Job#		Cust#		Status		Name		Active	<input checked="" type="checkbox"/>					
Cust Ref		From#		Priority		Acc. Mgr		Finish	<input checked="" type="checkbox"/>					
Inv#		Ship#		Type		Mode		Ready	<input checked="" type="checkbox"/>					
Item							Sale	<input checked="" type="checkbox"/>	Inv'd	<input type="checkbox"/>				
Item#		Serial#		Groups		OR	Service	<input checked="" type="checkbox"/>	Unread Email	<input type="checkbox"/>				
Make		Model		GL Dept			Manufacturing	<input checked="" type="checkbox"/>	Reserved	<input type="checkbox"/>				
Branch		SubBranch												
Projects														
Project#		Contract		Type		Master#								
Groups														
Price Lev.		Qte#		Our Ref#		Currency		Quote	<input type="checkbox"/>					
Date In>		Due>		Date Out>				Tax	<input type="checkbox"/>					
Date In<		Due<		Date Out<		Cust Grp								
Stock/Parts							Ship Grp							
Order#		Stock#		Status		Stock Grp								
Serial#		Attributes		OR		Source		Source Value						
Due within 2 Hrs By Due within date Status Overdue Due Date Overdue														

List Security

The ability to publish and manage lists must first be enabled using the new **Lists** section within **Tools > Security**. It is enabled for all Administrator groups by default.

The screenshot shows the 'Jim2 Security' window. At the top, the 'Security Group' is set to 'Administrator'. Below this are three input fields: 'Report Level' (10), 'Status Level' (10), and 'Price Break Movement Down' (-1). There are 'Add', 'Edit', and 'Delete' buttons. The main area is titled 'Area' and contains a list of items with checkboxes: Tools, Multicurrency, Scheduling, eBusiness, Notes, Jim2 eBusiness Framework (Jef), Dashboard, Email, Lists, and Templates. The 'Lists' item is selected, and a sub-item 'Allow managing Published Lists' is also checked. Below this is a section titled 'Users in Security Group' with a table of users.

Initials	Name	Active
HB	Happen Business Pty Limited	<input checked="" type="checkbox"/>
HR	Harry Rednapp	<input checked="" type="checkbox"/>
IMP	Implementers	<input checked="" type="checkbox"/>

A 'Close' button is at the bottom right.

How to Structure Published Lists

Now is a good time to reassess your use of Lists and your company workflow to ensure all users have lists most appropriate to their day-to-day work needs and company workflow requirements.

For example, a service team may use job lists such as:

- **Unread Email List** – Everyone
- **Unassigned Jobs** – Supervisor
- **My Jobs** – All users
- **All Jobs** – Supervisors
- **Parts** – Purchasing users
- **Ready Jobs** – Accounts users

Creating Published Lists

Step 1. Create the list you wish to publish within your own Jim2 profile.

Published Job List - UNREAD

Job# [] Cust# [] ... Status [] Name [SYS] [] [] Active ☒

Cust Ref [] From# [] ... Priority [] Acc. Mgr [] [] Finish ☒

Inv# [] Ship# [] ... Type [] Mode [] Ready ☒

Item [] [] Value will be the CardFile for the logged on User. Sale ☒ Inv'd ☒

Item# [] ... Serial# [] Service ☒ Unread Email ☒

Make [] Model [] Groups [] ... OR Manufacturing ☒ Reserved ☐

Branch [] SubBranch [] GL Dept []

Projects

Project# [] Contract [] Type [] Master# []

Groups [] ... OR

Price Lev. [] Qte# [] Our Ref# [] Currency [] Quote ☐

Date In > [] Due > [] Date Out > [] Tax ☐

Date In < [] Due < [] Date Out < [] Cust Grp [] ... OR

Stock/Parts

Order# [] Stock# [] Status [] Ship Grp [] ... OR

Serial# [] Attributes [] ... OR Stock Grp [] ... OR

Source [] Source Value []

Due within 2 Hrs By Due within date Status Overdue ☐ Due Date Overdue ☐

Drag a column header here to group by that column

Pick	Job#	Project#	Contract	Status	Mode	Cust#	Customer Name	Cust Ref#	Item#
	133			Booked					

[Add] [Edit] [View] [Run] [Cancel] [Show Total]

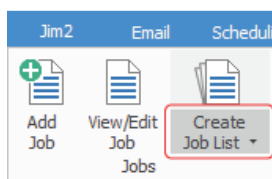
List [Advanced List] [3] UNREAD [Auto Pick Stock] Record 1 of 25

In the example above, we have created a list called 'UNREAD'. We have pinned the list, and set it to refresh every 3 minutes..

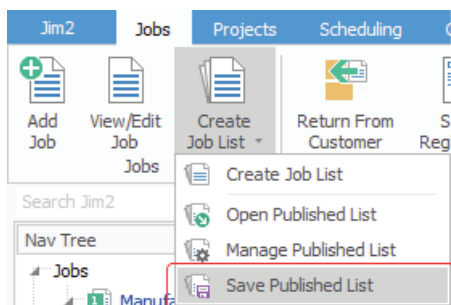
You can see we have set the list filter to show all Active, Finished, Ready and Invoiced jobs that have 'Unread Emails' attached to the jobs.

Most importantly, we have used new v4.1 functionality to set the 'Relative Name' to be automatically configured to 'Value will be the CardFile for the logged-on user', when used by other users.

Step 2. Save the list you have configured as a 'Published List' using the Jim2 Ribbon. Select the bottom section of the applicable 'Create List' icon (in this case, a Job List) to view the new Published Lists options.



Select 'Save Published List' to continue.



Once selected, the 'Published List Manager' will be displayed:

Published List Manager

List NameUNREADCreated BySYS

Description

Publish To

All Security Groups & Users

Administrator

Everyone

Manager

Sales

Technician

>

<

<<

Publish to Groups & Users

Group Or User	Edit Search	Removable	Visible
System administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Publish new Job list

SaveClose

Step 3. Configure the Published List's name, description, and user or group access.

Published List Manager

List NameUNREADCreated BySYS

DescriptionDisplay any job including those that have been invoiced to the logged on user when an UNREAD email is attached

Publish To

All Security Groups & Users

Administrator

Everyone

Manager

Sales

Technician

>

<

<<

Publish to Groups & Users

Group Or User	Edit Search	Removable	Visible
System administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Publish new Job list

SaveClose

In the image above, you can see the key areas have been highlighted –

- List Name:

The name of the list.
- Description:

The description of the list is shown to users above the list filter.
- Publish to Settings:

Select users by name, group, or simply select everyone to send to all. Then determine the level of access.
- Edit Search:

Ticking this option enables users to edit the list's search filters, with changes pushed to all listed users. By unticking the 'Edit Search' option, users are unable to make any changes to the published list search filters.
- Removable:

Ticking the box enables the user/group to delete the list from their Nav Tree, even accidentally. By unticking 'Removable' the user will not be able to remove the published list at any time.
- Visible:

This box must be ticked for all users who require access to the newly created list, whether the list should be shown to the user, or not

Select **Save** to finish.

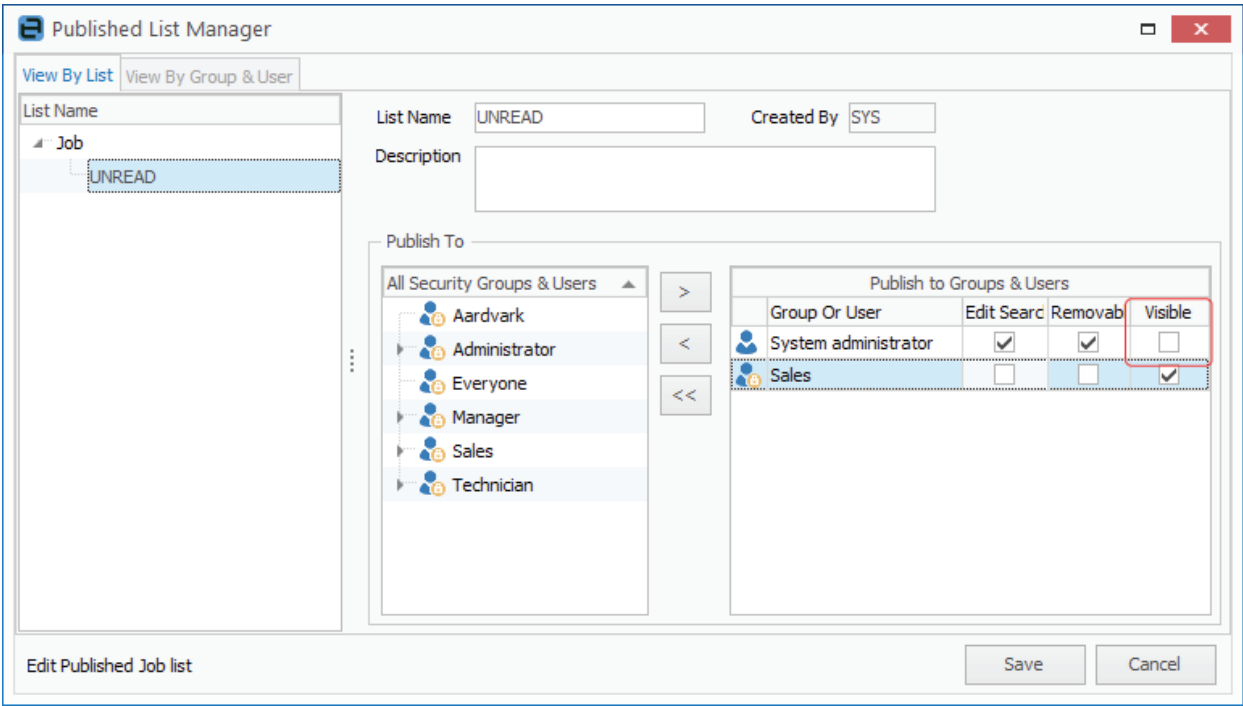
That's it! The new lists have been saved, and will be displayed to the selected user/group the next time they log in to Jim2 Client and Jim2 Mobile.

StatusPartsNameSYSActive☒

PriorityAcc. MgrValue will be the CardFile for the logged on User.

TypeReady☒

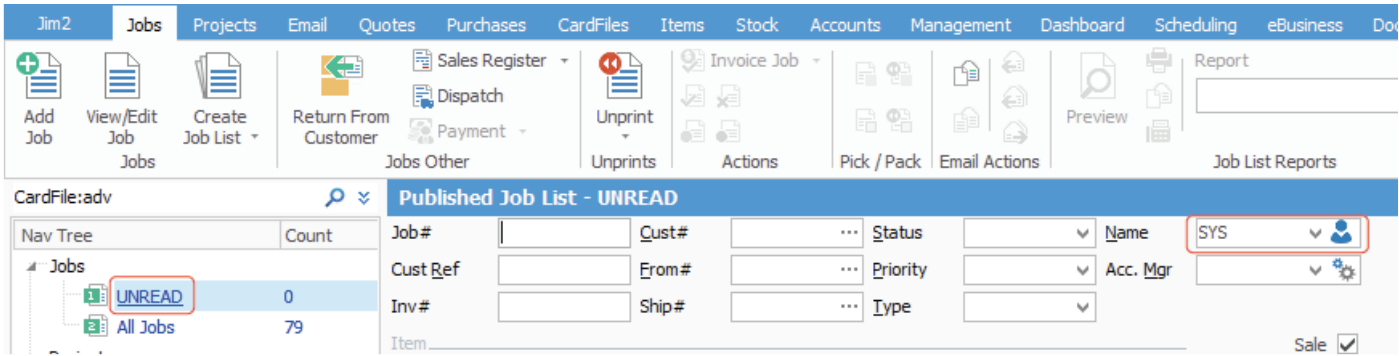
In this example, you can see the 'Visible' tick has been removed from the System administrator group, as we don't want this list to be published to System admins – only those in the Sales group view and receive the published list.



It is worth noting that, should you leave the Removable option ticked, the user will be able to remove the published list from the Jim2 desktop. However, it will reappear the next time the user logs in. For Jim2 Mobile users, the lists will appear the next time the lists are manually refreshed, or when logging in.

Published Lists Displayed in the Nav Tree

Published lists are highlighted with an underline in the Jim2 Client, and the list description is displayed to the user above the search filters.

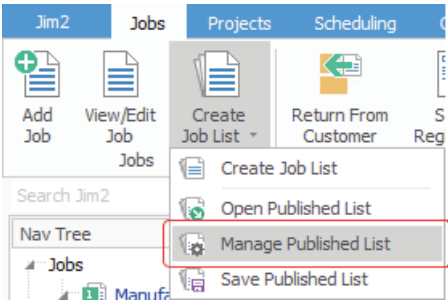


How Many Lists Can I Have Open?

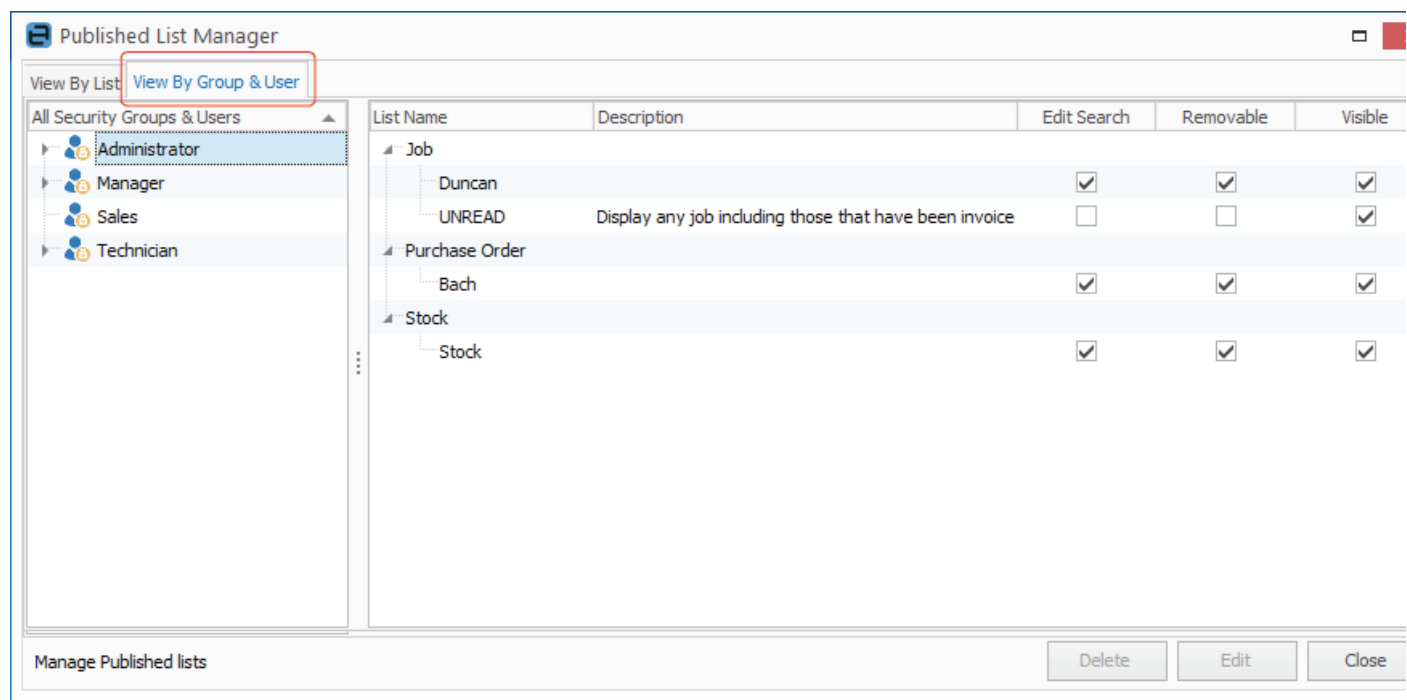
Maximum 20 objects lists open at once. Should a user already have 20 object lists open within the Nav Tree, the quantity of published lists pushed to users will cause the same quantity of existing lists to be removed from the user's nav tree, ie. three new lists published would see the last three lists removed from the existing user-defined lists.

Managing Published Lists as an Administrator

Administrators, and any users with security access to create published lists, can manage published lists any time by selecting 'Manage Published Lists' from the Jim2 Ribbon, as shown below:

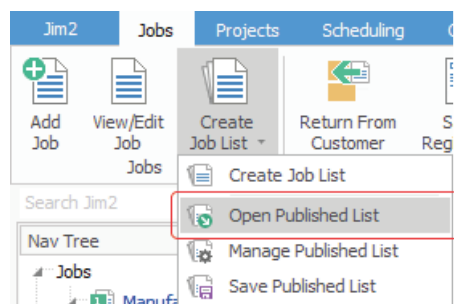


The image following has the alternate **View By Group & User** selected, which is an ideal way to see a summary view of the lists that will be displayed to a given user group.

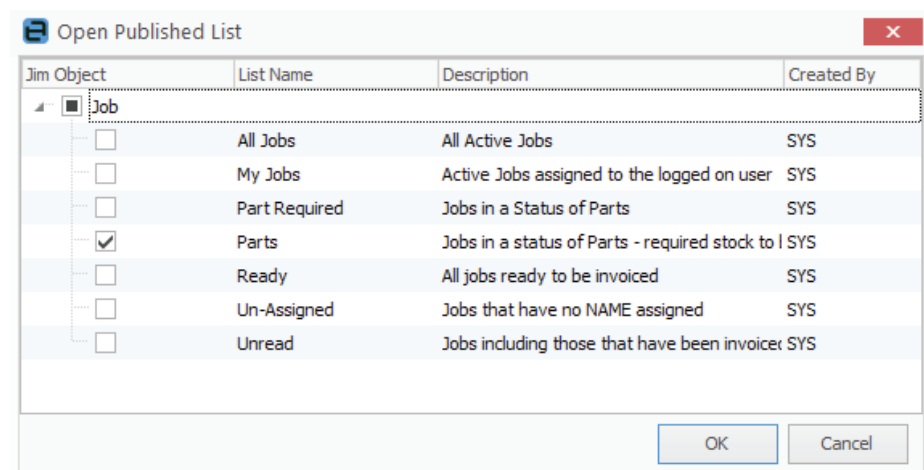


Opening Published Lists

Select **Open Published List** to open a list that is available to all users, though not currently visible in the Navigation Tree.



Note: it is only possible to open lists where you have permission and access to do so.



Tick each list to be added and select **OK** to add the lists to your Navigation Tree.

Removing User Defined Lists

Administrators can also delete non-published lists that users have created for themselves.

Published List Manager

View By List

View By Group & User

All Security Groups & Users

Administrator

Manager

Frank Lampard

Greg Tegal

Sales

Technician

Published Lists

User Defined Lists

List Name	User	Initials	Delete
Job			<input checked="" type="checkbox"/>
All Jobs	Frank Lampard	FL	<input checked="" type="checkbox"/>
Finish Job	Frank Lampard	FL	<input checked="" type="checkbox"/>
Joe's Jobs	Frank Lampard	FL	<input checked="" type="checkbox"/>
My Jobs	Frank Lampard	FL	<input checked="" type="checkbox"/>
Problem	Frank Lampard	FL	<input checked="" type="checkbox"/>

CardFiles

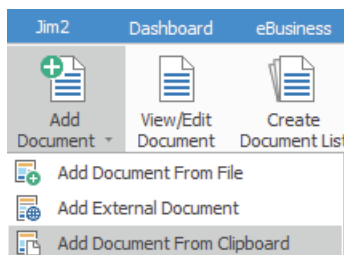
Ship Suburb and Ship Att field sizes have been increased.

Documents

Add Document Options

We have expanded the functionality to add a document to Jim2 into three options:

- **Add Document From File** – enables a user to add a document to Jim2 from their local or network drive, as previously available in Jim2.
- **Add External Document** – enables a user to add a document to Jim2 which is saved external to Jim2. This functionality is great for linking images stored online.
- **Add Document From Clipboard** – enables a user to add a document from the device's clipboard, which is particularly useful where they are unable to access document(s) from a local or network drive.

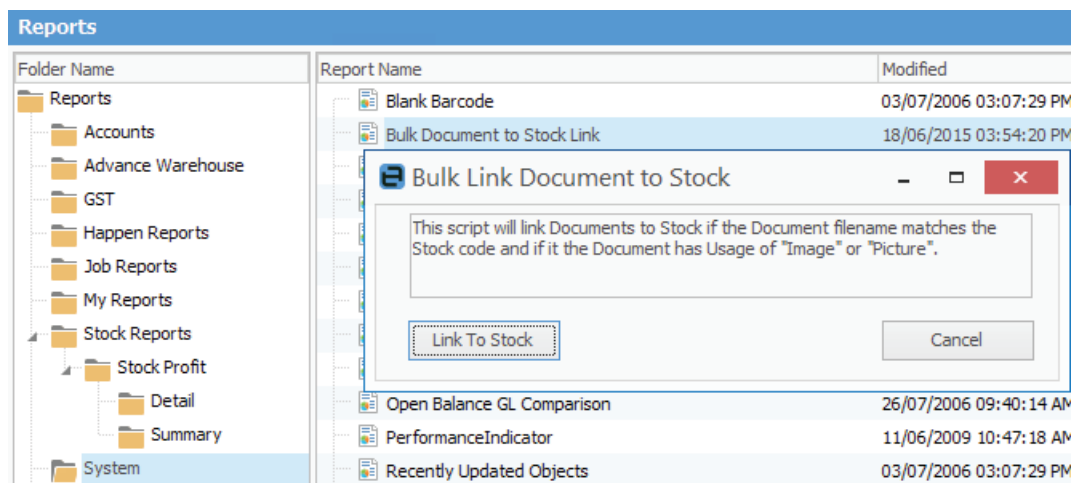


Once one of the three options is selected, users will complete the document details, including selecting a folder, category, tags, usage, etc, using the existing process in Jim2. To complete the process, select OK.

A screenshot of the 'New Documents' dialog box in the Jim2 application. The title bar says 'New Documents'. The main header is 'Cloud Setup5.png'. There are two tabs: 'Properties' (selected) and 'Security'. The 'Properties' tab contains several fields: 'Doc #' with the value '531', 'Name' with 'Cloud Setup5.png', 'Status' with a dropdown set to 'Booked', 'File' with 'C:\Users\indac\Desktop\PDF\Cloud Setup5.png', 'URL' (empty), 'Folder' with a dropdown set to '(Root)', 'Usage' with a dropdown, 'Category' with a dropdown, 'Tags' with 'None selected', a 'Hidden' checkbox (unchecked), and an 'Email as Link' checkbox (checked). There is also a 'Desc' field with a text area and a small image icon. At the bottom left, there is a checkbox labeled 'Link to file only (Do not upload file to database)'. At the bottom right, there are 'OK' and 'Cancel' buttons.

New Bulk Link Document to Stock Report

Documents can now be added in bulk using the new Bulk Link Document to Stock report (provided the document filename matches the stock code, and the document has the 'Image' or 'Picture' usage).



Documents can be optionally configured to create a URL link to the file location, rather than store the document in the Jim2 database.

New Documents

Filename	Link Only
mossie.jpg	<input type="checkbox"/>
grid.png	<input type="checkbox"/>

Select All ☐ Show file path

Document Common Properties

Properties Security

Folder (Root) Usage

Category Tags None selected Hidden Email as Link

☐ Link to file only (Do not upload file to database)

OK Ca

New Documents

Filename	Link Only
mossie.jpg	<input checked="" type="checkbox"/>
grid.png	<input type="checkbox"/>

Select All ☐ Show file path

grid.png

Properties Security

Doc # 529 Name grid.png Status Booked

File

URL C:\Users\indac\Pictures\grid.png

Folder (Root) Usage

Category Tags None selected Hidden Email as Link

Desc

☒ Link to file only (Do not upload file to database)

OK Ca

Improved document match handling

When adding a document to Jim2 that has the same name as an existing Jim2 document, you will be prompted with a confirmation as to how you wish to handle the addition. Previously, you were only prompted when the document names and content were an exact match. You will now receive a prompt as per below when there is a single match on the document name only, regardless of content match.

If there is more than one document in Jim2 with the same name, you will not receive the prompt, and it will be added as another new document of the same name.

When duplicate document names are detected, in order to proceed you will need to select an action for each document.

Actions include the option to:

- **Use Existing** – uses/links the existing rather than adding the new document.
- **New Document** – creates a new Jim2 Document.
- **Add New Version** – adds the new document as a new revision of the existing.

Matching Documents Found

Documents with the same name have been found.
Select an Action for each document listed.

Doc Code	Filename	Action	Exact Match
2005	arrow.png	Use Existing (Ignore new file)	<input checked="" type="checkbox"/>
2125	ArrowCollapse@2x.png	Choose Action	<input checked="" type="checkbox"/>
571	Capture.JPG	Add New Version	<input type="checkbox"/>

Email

Bulk Email from CardFile, Job and Project List enhancements

The bulk email function for CardFile lists has been improved, and is now also available from Project, Quote and Job lists. These enhancements now make it very easy to generate templated outbound emails.

When sending from a job or quote list, the emails will be automatically attached to the underlying Jobs/Quotes, as appropriate – a great new feature that allows you to send an email to a group based on products purchased, specific project types, and any other list filter.

The screenshot shows the 'Email from Job list' dialog box in the foreground, which is used for sending bulk emails from a job list. The dialog includes fields for 'Email Template', 'Test Email Address' (sys@gmail.com), and 'From Email Address' (sys@gmail.com). It also has a 'Subject' field and an 'Attachment' field. The 'Send To' section has four radio button options: 'Primary Contact' (selected), 'All Contacts', 'By Contact Type', and 'For Type'. Below these is a list of jobs with columns 'Job#' and 'Email'. The list shows 117 jobs, with the first few being '16 jeff@modem.com.au', '38 jdaycom@daycom.com.au', '39 jdaycom@daycom.com.au', '40 jdaycom@daycom.com.au', '41 jdaycom@daycom.com.au', '42 jdaycom@daycom.com.au', and '44 dawn@mccg.com.au'. The 'Preview' button is highlighted with a red box. In the background, the 'Job List Reports' window is visible, showing a table of customer data with columns 'Customer Name', 'Cust Ref#', and 'Item#'. The table lists various customers like 'The Modem Company', 'Daycom Electronics Pty', and 'Mosley Consulting Group'.

Create a New Bulk Email

1. Select report 'Email from object (ie. Job) list' and 'Preview'.
2. Select the From: email address to be used.
3. You can optionally override the Email Template Subject with a new subject heading.
4. Send To options – enhanced to give greater control over which contacts within the list and selected email type, and which underlying email address to use when sending:
 - **Primary Contact** – sends to all primary contacts where the contact Type 'Email' exists, and has a value.
 - **All Contacts** – sends to all contacts within a company where the contact Type 'Email' exists, and has a value.
 - **By Contact Type** – all contact types with 'Email' contained are displayed. Once selected, only contacts with the specific Contact Type value will be selected for sending. The Email value for the given Contact Type is used as the To: address.

This screenshot shows the 'Send To' section of the 'Email from Job list' dialog box. It features four radio button options: 'Primary Contact', 'All Contacts', 'By Contact Type' (selected), and 'For Type'. Below the 'By Contact Type' option is a dropdown menu showing a list of contact types: 'Email Accounts', 'Email', 'Email Creditors', 'Email Debtors', and 'Email Invoices'. The 'Email Accounts' option is currently selected in the dropdown. At the bottom of the dialog, there is a 'Card Code' field.

- **For Type** – select contacts based on the existence of any configured Contact Type, and with the ability to choose which value with 'Email'.

5. Once selection criteria have been entered, the grid is populated with matching contacts. As per below, you refine the recipients list even further by manually removing contacts using the – button prior to sending.

Send To

☐ Primary Contact

☒ All Contacts

☐ By Contact Type

☐ For Type

Select Contact, then click the - button to remove.

Job#	Email
16	jeff@modem.com.au
16	service@modem.com.au
36	averamis@daycom.com.au
36	jdaycom@daycom.com.au
37	averamis@daycom.com.au
37	jdaycom@daycom.com.au
38	averamis@daycom.com.au
38	jdaycom@daycom.com.au

1 of 111

Preview Send Cancel

Email Editor Enhancements

To simplify the process of deleting an email address in the 'To' drop-down, you will now see an X on the far right which allows you to delete the address.

Untitled

HOME TEXT INSERT

Attach from file Select Document Paste

Email Clipboard

From: mail@democompany.com.au

To:

CC:

BCC:

Subject:

Send

mark@democompany.com.au

peter@democompany.com.au

jenny@democompany.com.au

accounts@democompany.com.au

support@democompany.com.au

Click on the cross to delete the email address

Email to SMS functionality

Jim2's new bulk email functionality enables you to collaborate with a third-party Email-to-SMS provider, such as messagenet.com.au or esendex.com.au, to send/receive texts directly to/from your customers. Send Email-to-SMS messages to let a customer know a technician is on their way, or receive an SMS and log a new job in Jim2.

When a customer replies to an SMS, and the subject from the original SMS they received is contained within the response, we can use a Jim2 Email rule action to create a job.

Steps to set up Email-to-SMS:

1. Sign up with an Email-to-SMS service, and enable the From: account in Jim2 to be allowed to send email. Most providers will restrict who can send emails via the service-based email addresses. It is important that any email address that will be in the From: is registered for use with the provider.
2. Have the provider enable the original SMS to be in the reply function (messagenet). This means you can use email rules and templates to better handle inbound replies from clients.
3. Update the users in Jim2 with a new Contact Type, ie. Name = Email SMS Value = 0410695812@messagenet.com.au (example only).

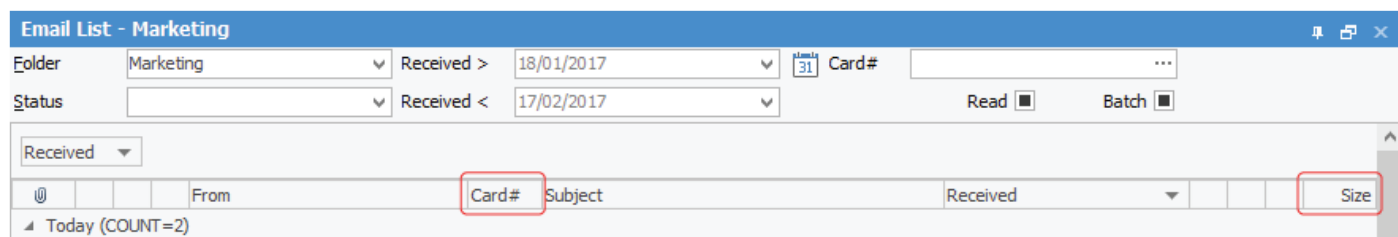
Then, from anywhere in Jim2 you can send an email to that address, and the client will receive it via SMS.

You should keep the content of the email brief. This can be used with the new Email from CardFile and Email from Job and Project list scripts.

Additions to Email Lists

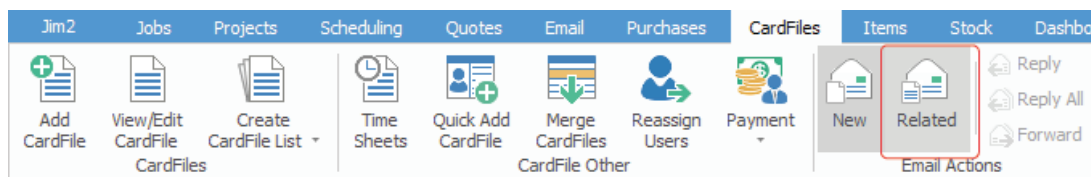
There are now two extra columns within the Email list:

- **Size** – of email
- **Card#** – CardFile code



Related Email

It is now possible to send a related email from a CardFile.



Search within Email Lists

Using the find panel, you now have the ability to search within an Email List for emails that are attached to Jobs.

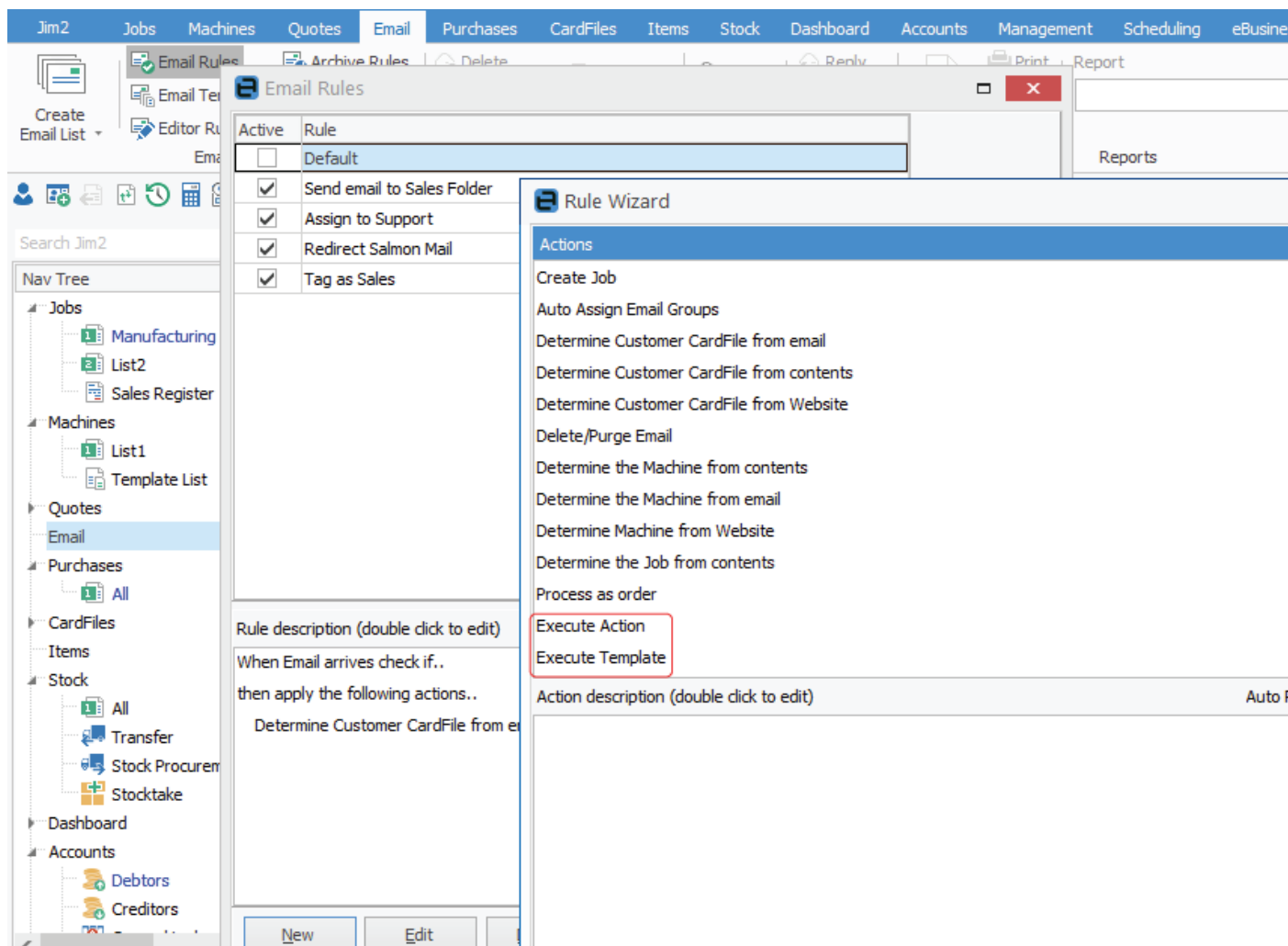
Email attachment handling improvements

Adjustments have been made to the way in which attachments are handled within email. This improvement was introduced to alleviate out of memory conditions being experienced by some users when handling email with large attachments.

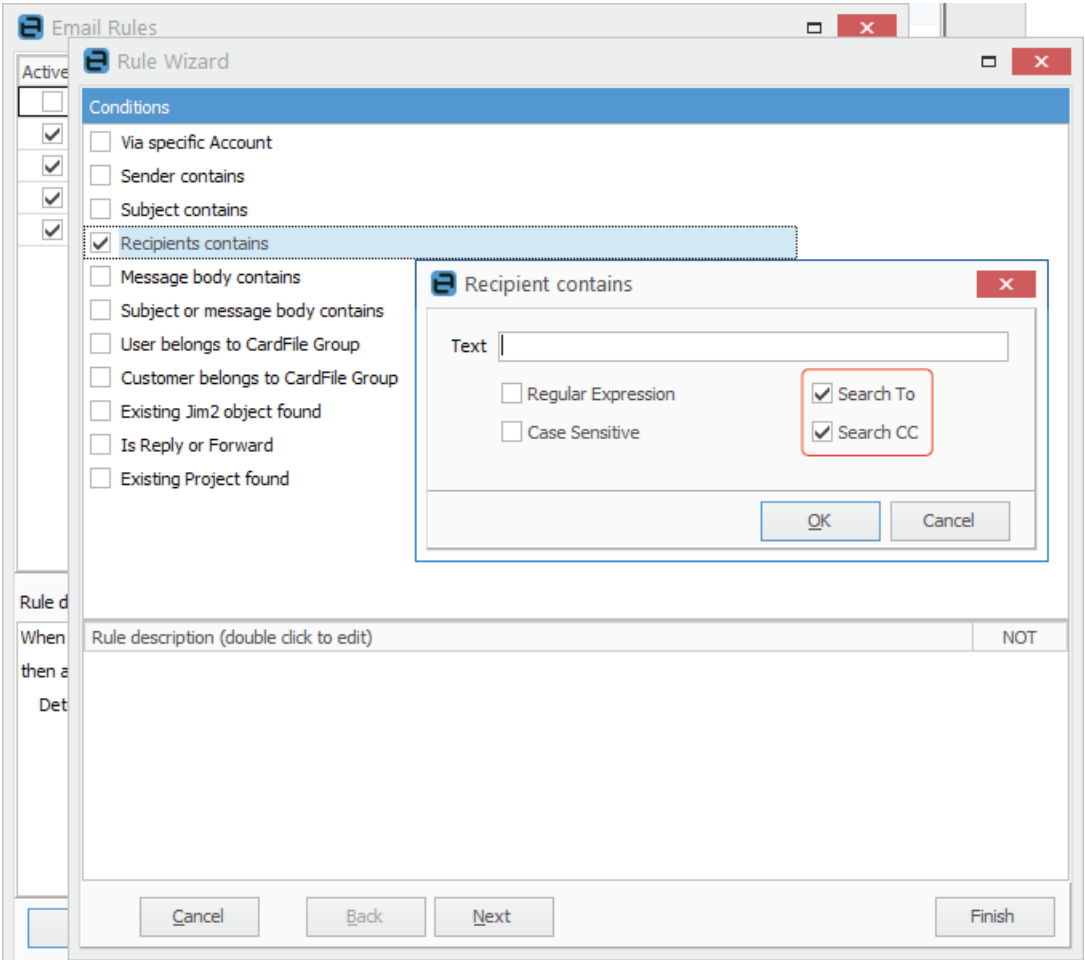
We have improved overall speed (preview is now much faster), with better handling of large emails.

Email Rules

Email Rules – Project Template support:

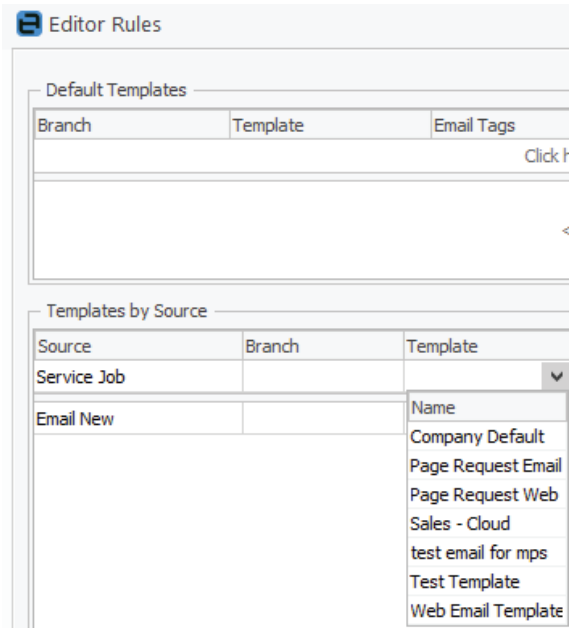


Recipient contains can be restricted to To and/or CC



Email Editor Rules

Within Email Editor Rules, you can now have the same 'Source' using any number of different templates. Jim2 will then randomly pick a template when sending. You can use this to randomly cycle through a number of templates that can advertise various offerings of your business.



Tagging Objects to Emails

The email object tagging function now provides a filtered list of existing objects for the specific CardFile tagged to the email. This is only available when there is a Jim2 CardFile associated to the email.

Assign email to object

Job

Job #	Item	Fault Desc	Name	Status	CustRef#
3075750	S.MOBILE	Ipad query - Card...	Ernest Jaraminas	FINISH	ROWENA
3079980	S.INVOICING	I think I have bee...	Renee Pimentel	Proceed	ROWENA
3079971	S.CREDITORS	Electronic Paymen...	Renee Pimentel	FINISH	ROWENA
3077183	S.JOBS	Incorrect cardfile ...	Ian Dick	Wait	ROWENA
3070042	S.MOBILE	We want the Reps...	Ernest Jaraminas	WaitReleas	ROWENA
3053145	S.SCHEDULING	Question re sched...	Ian Dick	Booked	ROWENA
3074650	SUB.MS		John Green	Booked	RENEWAL

Job

Date in and Date Due on back order jobs has been changed to show the original order date.

Priority can now have a sort order

Setup - Job Priority

GL Departments

Stock GL Groups

Tax Codes

Banking

Payment Type

Tills

CardFiles

Contact Types

Priority

Allow 2 Days

Low

Machine Down

Next in Area

Normal

Urgent

Sort Orde

Stock grid UI changes

UI changes have been made to the job stock grid in an effort to increase visibility of issues with supplying stock. If any stock is back ordered, the Backordered column will be red.

If the Supply plus Backordered figures do not equal the ordered quantity, both the Supply and Backorder figures will be displayed in red.

1	Status	Location	Stock Code	Description	Unit	Order	Supply	B. Ord	Price Ex.	Price Inc.	Disc %	Tax	Hide	Total
1	QLD	FFS400	...	Fixation Finishing Spray 400g	EACH	32	16	16	8.45	9.30	0	G		297.60
2	QLD	BSG150	...	Body.n.Shine Styling Glaze 150ml	EACH	3	3	0	13.61	14.97	0	G		44.91
3	QLD	STMTRIO	...	Scalp to Hair Moisture-Rich Thinning Kit with Mineral Defence. 100ml	EACH	10	5	1	30.28	33.31	0	G		333.10

Stock In Advance Changes

The default behaviour for the Stock In Advance dialog is controlled via **Tools > Options > Job > Stock**. This can now be overridden at a stock level, allowing, for example, a specific stock is not to be back ordered.

To override, edit a stock, click on Details, and select the behaviour from the dropdown.

Editing Stock MOUSE.SPECIAL

Stock

Details

Locations

Descriptions

Projects

Warranty

0

(in months)

Publish Price to

Price List & Web

Round price up to nearest

25

cents

Labour Content

0.00

Hide on Invoice

Allow Price Override

Stock in Advance

{ Default Use Options }

Floor Cost Markup

{ Default Use Options }

Supply only available (backorder the rest)

Manuf. Part#

Supply only available (no backorder)

Backorder all

GTI/UPC Number

Commission Discount

Superseded By

Stock Availability Changes

Stock availability can now automatically update when adding multiple stock. For example, when selecting multiple stock from the stock selection screen, or when stock is added via changing a job's Item.

Enable this new feature via **Tools > Options > Job > Stock**, and then tick 'Auto update available Qty when Stock is added to grid'.

With this feature enabled, Jim2 will automatically update the Supplied and Backordered quantities, using the stock's 'Stock in Advance' setting, or if not set, falling back to the default set in Options.

The row will also be highlighted as per normal Stock Availability as follows:

- Green 100% availability
- Orange less than 100% availability
- Red 0% availability

Job List

To flag that a customer is on credit hold, the Cust# field will display red.

Job List - 1

Job#	<input type="text"/>	Cust#	<input type="text"/>			
Cust Ref	<input type="text"/>	From#	<input type="text"/>			
Inv#	<input type="text"/>	Ship#	<input type="text"/>			
Item						
Item#	<input type="text"/>	Serial#	<input type="text"/>			
Make	<input type="text"/>	Model	<input type="text"/>			
Branch	<input type="text"/>	SubBranch	<input type="text"/>			
Projects						
Project#	<input type="text"/>	Contract	<input type="text"/>			
Groups						
<input type="text"/>						
Drag a column header here to group by that column						
Pick	Job#	Project#	Contract	Status	Mode	Cust#
<input type="checkbox"/>	16			FINISH		MODEM.COMP

Purchase Orders

The purchase order workspace has been enhanced to include a new field to assign a user name to a purchase order. This enables you to track which user is creating the PO, and also enables users to filter a list of POs by user name.

Stock

Inactive stock is no longer added to Jobs or Quotes when using the 'Create Similar' function.

Stock Select

History Tab added to the stock selection screen. Within the Stock Select screen, there is now a History tab which displays all stock previously ordered by a customer. This tab displays up to 365 days of stock history.

Stock Select - L.MOD

Search & Filter

Stock Code: [] Desc: [] Location: NSW

Group Level: 0 Groups: [] ... OR ☐ Qty On Hand > 0

Report Groups | Brands | Related Stock | **History** | Selected Stock

Code	Descri...	Unit	Qty On Hand	Committed	Back Order	Ordered	Linked Jobs	Available	List Inc.	Selected Q
L.MOD	Labour Mx HOUR		0	0	0	0	0	0	\$0.00	0
RES. 1/2W	1/2 Watt UNIT	UNIT	0	31	0	0	0	0	\$0.00	0
TRANSISTOR	TRANSIST UNIT	UNIT	0	31	0	0	0	0	\$0.00	0

Price Lev: <No data to display>

Show all Locations Show Attributes Run OK Cancel

Stock Procurement changes

Stock Procurement now takes into account manufacturing jobs. Manufacturing Qty has been added to the Stock Availability grid in the Stock screen.

If stock is Manufacturing, a Manufacturing column will be shown in the 'Qty by Locations' grid showing how many are currently being manufactured.

Viewing Stock SYS.P3

Stock Details | Locations | Descriptions | Projects

Stock Code: SYS.P3 Type: Depleting GL Group: Systems Active: ☒

Desc: Pentium III, 866Mhz System

Measure Unit: 1 UNIT = 1 Quantity Unit Description Barcode

This stock I

☐ Buy in UNIT G 10 % ☒ Manufacture

☒ Sell in UNIT G 10 % ☐ Service

Qty by Locations

Branch	Location	Qty on Hand	Committed	Available	BackOrder	Packaged	On PO	Manufacturing
	NSW	4	4	0	0	0	0	2

Serial# Attributes

☐ not required ☒ not required

☐ on purchase ☐ on purchase

☒ on sell ☐ on sell

Stock Procurement will include the number of stock being manufactured when calculating order quantities.

Within a Manufacturing job, Stock Select now includes the number of stock being manufactured in the 'On PO' column.

eBusiness

eBusiness Connect

Vendor Stock Feeds now support URL downloads:

Configure Feeds

Vendor Code: VENDORCODE

Look for feed file in/at:
☐ Email ☐ Directory ☐ URL

Sender match expression:

Subject match expression:

File name expression:

Directory PickUp:

Download URL:

☐ Feed file is zip'd ☐ Feed is GZip'd

Zip File name expression:

Zip File Password:

Default Tax Code: G ☒ Reset Vendor Discount

XML Options: XSLT

Buttons: Add New, Remove, Save, Cancel

Updates to Dynamic Supplies and Dicker Data Stock Feeds

Dynamic Supplies Stock Feed – New Format

Dynamic Supplies have updated their feed format that now supports multiple warehouse stock locations.

As Jim2 v4.1 only supports the new format feed from Dynamic Supplies, all clients currently receiving the Dynamic Supplies feed need to email Paul Manning at Dynamic Supplies (paul@ds.net.au) to request the new format as it's necessary for this update.

In summary, Jim2 v4.0 supports the old format, and v4.1 supports the new format which must be obtained from Dynamic Supplies.

Dicker Data Stock Feed – New URL Connection

Dicker Data no longer supplies stock feeds via email due to email size restrictions, and are now sending stock feeds via URL. As this release now supports URL downloads, the Dicker Data feed is only available to customers running Jim2 v4.1, not prior Jim2 versions.

When upgrading to Jim2 v4.1, all clients currently receiving Dicker Data Feeds need to contact sales@dickerdata.com.au to obtain the URL in XML format.

Dicker Data supplies each customer with a unique URL for their specific data feed, which must be updated in Jim2 to use the new URL connection.

Example URL: <https://www.dickerdata.com.au/Download?file=LEJaaaAAAAaORAbq6cEAvQiXXXXXXXXXnnnnnnnnXXXJMRaj4TNYz9RKlV5x1fCnVOi&fileName=DickerDataDataFeedXML>

Example configuration:

Configure Feeds

Vendor Code:

Look for feed file in/at:
☐ Email ☐ Directory ☒ URL

Sender match expression:

Subject match expression:

File name expression:

Directory PickUp:

Download URL:

☐ Feed file is zip'd ☐ Feed is GZip'd

Zip file name expression:

Zip File Password:

Default Tax Code: ☒ Reset Vendor Discount

XML Options
XSLT:

eBusiness Link – updated event handling

Now includes support for additional events: CustChanged, FromChanged and ItemChanged events with B2B IN custom modules.

eSend purchase orders

Comment added to PO comment grid when a PO is sent electronically.

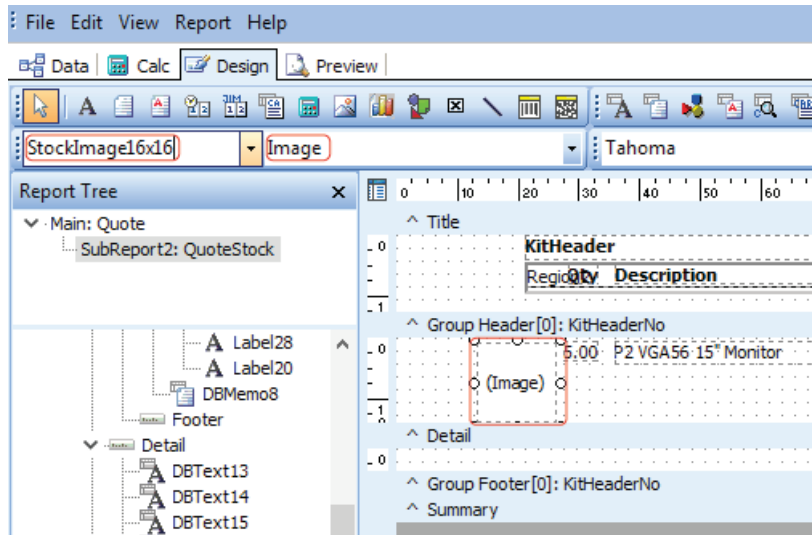
Reporting and Report Designer

Adding Images to Reports

Now just got much easier!

To get images that are linked to stock, or any other Jim2 object:

1. Add the document to the Jim2 object that has usage of one of these: Image16x16, Image32x32, Image128x128.
2. In Remote Script Call function HookImagesJITPipeline. For example, In Quote Script HookImagesJITPipeline(ppQuoteStock, Stock, 'Image16x16').
3. Add DBImage to report and link to Image field as below.



New and Updated Reports

Management reports show in folder view. Stock Profits now has sub folders and we have improved the speed of stock profit reports. Stock profit and Top X now allow you to save the report settings with search filters, as well as export raw data to Excel.

The screenshot shows the 'Stock Profit By Item' dialog box. It has a title bar 'Stock Profit' and a close button. The main title is 'Stock Profit By Item'. The 'Customer & Item' section has 'Customer' (All, Selected, Selected Groups) and 'Price Level' (dropdown). The 'Item' section has 'Item#' (dropdown), 'Groups' (text), 'Make' (dropdown), and 'Model' (dropdown). The 'Job' section has 'Date Sold >' (01/01/2013), 'Date Sold <' (31/01/2017), 'Type' (dropdown), 'Name' (dropdown), 'Acc. Mng' (dropdown), 'Report Level Depth' (5), 'Job Type' (All, Sale, Service), 'Include' (Invoices, Dockets, Customer Returns, Debtors PO's), and 'Branches' (Branch, SubBranch, GL Dept.). The 'Stock' section has 'Type' (Labour, Depleting, Non Depleting, Special, Applies, Journal), 'Location' (dropdown), 'Supplier' (dropdown), 'Filter by Margin' (checkbox), 'Margin %' (10), 'For Kits show' (Kit header, Kit Details), and 'Show Attributes' (checkbox). At the bottom, there are 'OK', 'Cancel', 'Data Only' (checked), 'Save' (with a folder icon), 'Delete' (with a trash icon), and 'Share' buttons. The 'Save' button is highlighted with a red box.

Jim2 Spreadsheet Reports

Now supports Microsoft XLSX format.

Contact Email Export Report

This new report script allows you to export contacts and their email addresses. Selection option based on Contact Type and when Contact Type does NOT exist.

CardFile List Contact Export

Export Contact Info

Contact Type

☐ Primary Contact

☐ All Contacts

☐ By Contact Type

☐ For Type

☒ Type not found or Blank

Save to Excel

Cancel

Miscellaneous Enhancements

Add Labour

Add labour via XML is no longer supported.

Debtors/Creditors

Debtors/Creditors now shows cash GST Session#. When viewing a debtor/creditor there is now a column which will show the GST session that the banked payment relates to.

Dispatch

Now have the ability to set the Ship Ref# at the job level from the Dispatch list:

Add Invoice to Dispatch

Invoice#41386Phoebe Huang

Ship ViaCouriers PleaseNo Ship Via currently set

Ship Ref#243234

Apply Invoice shipping details to Orders

Use Invoice		Current Order Shipping Details			
Ship Via	Ship Ref	Order #	Ship	Current Ship Via	Current Ship Ref#
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	26148	Phoebe Huang		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	26231	Phoebe Huang		

☐ Select All

OKCancel

Enhancements to Data Import

There are now more choices for import destination:

Import data

STEP 1/5. Select import destination

Import destination: Stock

- Stock
- Card File
- Opening Balances
- Item
- Contact
- Project
- Stock Location Procurement
- Stock Vendor Pricing
- Stock Pricing

Test Last Import

separated text file

Jes Notify Module (part of eBusiness Service)

Updated comment macro variables for email subject and body templates.

The Jes notify module enables job-related email alerts to be generated based on Job Status Due, Due Date, Job Added, and Job Edited.

The following additional variables have been added for use with these email alerts:

- Last Inc Comment** – includes the last comment checked INC in the job alert.
- Last Exc Comment** – includes the last comment not checked INC in the job alert.
- Last comment** – includes the last comment added in the job alert.
- All Inc Comment** - includes all comments checked INC in the job alert.
- All Exc Comment** - includes all comments not checked INC in the job alert.
- All Comment** – include all the comments on the job in the job alert.

Object History

Ability to return the last 'X' modifications to a given object

History				
Object	Stock	Stock Code	OR	Most recently edited
Drag a column header here to group by that column				
* Ref No	LogEvent	Initials	DateStamp	
2121030	Edit	SYS	02/06/2016 09:21:25 AM	
2121030	Edit	SYS	02/06/2016 09:21:18 AM	
2121030	Edit	SYS	02/06/2016 09:21:11 AM	
2121030	Edit	SYS	02/06/2016 09:21:01 AM	
2121030	Edit	SYS	02/06/2016 09:19:39 AM	
AMAL240SLA	Edit	SYS	01/06/2016 04:57:23 PM	
AMAL240SLA	Edit	SYS	01/06/2016 04:57:05 PM	
AMAL240SLA	Edit	SYS	01/06/2016 04:51:12 PM	
AMAL240SLA	Edit	SYS	01/06/2016 04:48:09 PM	
AMAL240SLA	Edit	SYS	01/06/2016 04:43:52 PM	
AMAL240SLA	Edit	SYS	01/06/2016 04:05:04 PM	

PC EFTPOS

Jim2 v4.1 requires an updated version of the PCEFTPOS Server. The server name at the protocol level is changed to make the previous PCEFTPOS server incompatible with v4.1.

Tyro

Jim2 will allow cancelling Tyro EFTPOS payments halfway through a transaction.

Managed Services Edition Enhancements

Skip this section if Managed Services/Managed Print Services are not relevant to you. Go to page 86.

Full Dynamic Kit Support

It's been long awaited, and we are extremely happy to now offer full dynamic kit capability within the Managed Service job creation process. In line with our 'Unified Billing' focus, you can now completely customise which stock will be included on a billing job (or any other job type) within Kits.

This includes the ability to hide stock and price on some or all stock lines within the kit, giving full control of how the kit(s) will look when the billing job is created.

GL Dept														
Stock														
	Stock Code	Stock	Qty	Unit	Unit Qty	Price Ex.	Price Inc.	Disc %	Disc Price Ex.	Disc Price Inc.	Tax	Hide	Total Ex.	Tot
▶ 1	J2C.NS	Jim Cloud New Site Summary		1 UNIT	1	0.00	0.00	0	0.00	0.00	G	<input type="checkbox"/>	0.00	
2	J2C.NS27	Initial Jim2 data gathering email sent		1 UNIT	1	0.00	0.00	0	0.00	0.00	G	<input type="checkbox"/>	0.00	
3	J2C.NS05	Existing Server		1 UNIT	1	0.00	0.00	0	0.00	0.00	G		0.00	
<														

The kit capability is made possible as part of the new Project Template functionality.

Project Templates

Another of the key functionality updates to v4.1 is Project Templates. Project Templates allow a set of jobs to be created with predefined values. This allows for fully customised job creation, and ensures far greater speed and continuity of data capture during the job creation process.

This new functionality enables multiple jobs, both billing and other, to be created simultaneously from the Project. This may be for split billing (billing jobs), or to create a set of jobs that make up a project.

Viewing Template 1

Template# 1

Template MSA Platinum Billing Template

☒ Active

Template Restrictions

Action <Unrestrict> Level <Unrestrict>

Cust #

From#

Ship#

Item#

Date Due

Fault Desc.

Inv Desc.

Branch

Status Ordered

Priority Normal

Type Billable

Item Desc. Managed Service Billing

Req Days 7

Hours

Serial No

Included Templates

Ready

Price level

Tax Paid

Item Auto Add

Serial No

Included Templates

Name SYS

Acc.Mgr

Tax Total Tax Free Up

Currency

☐ Billing Job

☒ Shared

Stock

Contract Value

The ability to see the managed service/recurring job contract value within the Project and Project list is also now possible. All billing templates include a total contract value that can be seen within both the Project and Project list. Note: not all columns are shown here.

Step 1. Creating New Actions and Action Groups when required

Tools > Setups > Projects > Actions

Action Name	Action Type	After Execution	Watch Note	Execute From	Allow Exeo	Action Groi	Syste
Billing	Action	Leave in edit mod		Project and Project list	Both Action		<input checked="" type="checkbox"/>
Client Setups	Action	Leave in edit mod	Add Service Job	Action Group Only	Both Action	Jim2 Cloud	<input type="checkbox"/>
Consumable	Action	Leave in edit mod		Project only	Both Action		<input type="checkbox"/>
Jim2 Cloud	Action Group			Project and Project list	Both Action		<input type="checkbox"/>
Onsite	Action	Leave in edit mod	Add Service Job	Project only	Both Action		<input type="checkbox"/>
Remote	Action	Leave in edit mod		Project only	Both Action		<input type="checkbox"/>
Service	Action	Leave in edit mod		Project only	Both Action		<input type="checkbox"/>
Workshop	Action	Leave in edit mod		Project only	Both Action		<input type="checkbox"/>

Select **Add** to display the action setup options.

Action Name

Action Type

Action

☐ System

Execute From

Project and Project list

Action Groups

None selected

Allow Execution of

Both Action & Template

After Execution

Leave in edit mode

Watch Note

Add Service Job

Save

Cancel

Delete

View

Close

Action Name

Action Type

Action

☐ System

Execute From

Action Group Only

Action Groups

Action

Allow Execution of

Both Action & Template

After Execution

Leave in edit mode

Watch Note

Add Service Job

Save

Cancel

Delete

View

Close

Changing the Action Type to 'Action Group' will refresh the screen to show you the appropriate setups for an Action Group:

Action Name

Action Type

Action Group

☐ System

Execute From

Project and Project list

Child Action Check

Allow Execution of

Both Action & Child Action

Save

Cancel

Delete

View

Close

The Watch Note option specifies which project watchout 'when' option to use for the given action.

Adding Watchout #660

On

Project

 when for

...

☒ Active

☐ Add to Object Comments when fired

Valid from to

Add

Add Billing Job

Add Consumable Job

Add Service Job

Action Setups

Action Name: The Name for this Action.

Action Type: Action or Action Group as above.

Execute From: Where the action is configured to display within Jim2.

- **Disabled:** The Action will no longer be available for use.
- **Project & Project list:** Whether the action can be run/displayed from a Project list and a Project.
- **Project Only:** When the action can only be run/displayed from within a Project.
- **Action Group Only:** When the Action can only be run from within an Action Group.
- **Scheduled Tasks:** Once an action is set for Scheduled Task, it won't show in the normal Action menus. They are used for managed service recurring tasks, and cannot be fired from a project list, project or job.

Allow Execution of: How the associated templates can be run.

- **Both Action & Template:** Allows the user to select the Action to run all the underlying templated jobs, or to select a single template.
- **Action Only:** User can only run all the templates associated to the Action. They cannot be individually selected.
- **Template Only:** User cannot run all templates at once, and is forced to select an individual template.

After Execution: Post Job creation options:

- **Leave in edit mode:** The job is created and left in in 'Edit' mode.
- **Add related stock:** Displays the related stock selection screen (consumable job).
- **Save:** The job is created and saved.

Action Groups: Display and Run Action from within an Action Group (optional).

Watch Note: The Watch Note option specifies which project watchout 'when' option to use for the given action.

Action Group Setups

Execute From: Where the Action Group is configured to display within Jim2.

- **Disabled:** The action group will no longer be available for use.
- **Project & Project list:** Whether the Action Group is run/displayed from a Project list and a Project.
- **Project Only:** When the Action Group can only be run/displayed from within a Project.

Allow Execution of: How the associated templates can be run.

- **Both Action & Child Action:** Allows the user to select the Action Group to run all the underlying actions and templates, or to select them individually.
- **Action Only:** User must select an Action. They cannot select at Action Group level.
- **Child Action Only:** User is forced to select an individual action with its associated templates.

Step 2. Create new Managed Service Project Types as applicable

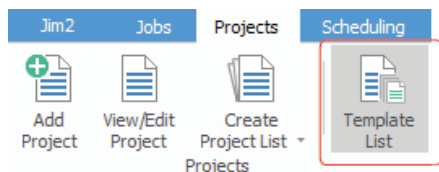
Tools > Setups > Projects > Project Types

In the example below we have added the Project Type 'Jim2.Cloud'.

All Managed Service Project Types should have the System Type of 'Managed Service' selected.

Step 3. Create Project Templates

Project Templates can be created during the Action Wizard process, or via the Template list within the Jim2 Projects.



Project Template List

Template#Template NameProject System Type

Enabled

ItemJob TypeProject Type

Shared

Template Restrictions

Action

<Unrestricted>

☐ Exclude Compatible

Level

<Unres

☐ Exclude Compati

Drag a column header here to group by that column

Template#	Template Name	Action Constraint	Object Type Con	Object Constrai	Item#	Card Code#	Job Type	Enabled	Shared
1	Default Template				Leave value	Card # on	Leave value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Managed Services Default				Leave value	Card # on	Leave value	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	New Client Setup	Billing	Project Type	Managed Service	S.CLOUD.NS	Card # on	Billing	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The Template list is where you can see all the Project Templates within Jim2.

When upgrading, existing Jim2 users that already use Projects to manage contract billing will see several Billing templates that have been created from the existing Default Stock tab lines in Projects.

Billing templates are now used when generating billing jobs from Projects. In addition, there are some default non-billing templates that have been created.

Creating a new Template

Select 'Add' from the bottom of the Template list.

Take the time to hover your mouse over some of the data entry fields, and a pop-up will be displayed.

Template# 5

Template

☒ Active

Template Restrictions

Action <Unrestricted>

Level <Unrestricted>

☐ Billing Job

☐ Shared

Cust #

Status

Ready

Cust Ref#

Our Ref

Item#

Date Due

Fault Desc.

Inv Desc.

Branch

Stock

Cust Ref#

Value on this template:

Leave value unchanged

Effective value on this template after checking included templates:

Cust Ref on Project

Effective value source template

Managed Services Default Template

Value path

Template #

Template Name

1 Managed Services Default Template

Name

Acc.Mgr

Tax Total

Currency

1

Managed...

Insert

As in the example above, you will see that fields have different colour shading, which is designed to help you understand where the values in a template are being derived from. You can also see we have an included Managed Services Default template (more detail on this in a later section).

Out of the box, all new templates will inherit values from the Managed Services Default Template (included templates) which you can see in the list of project templates. This can be removed from Included Templates, or changed to another template at any time.

The Managed Services Default Template already has some key values configured, and saves you from having to configure them for every template you create.

You will also see that the mouse-over pop-up Cust Ref# explains where the value of the Cust Ref# field will come from when creating the job. In this instance, it is coming from 'Cust Ref on the Project'. Following is the result of the updated template.

Viewing Template 8

Template# 8

Template New Client Setup

☒ Active

Template Restrictions

Action <Unrestricted>

Level <Unrestricted>

☐ Billing Job

☐ Shared

Cust #

Status

Ready

Cust Ref#

Our Ref

Item#

Date Due

Fault Desc.

Inv Desc.

Branch

Stock

Cust Ref#

Value on this template:

Use value entered

Effective value on this template after checking included templates:

Use value entered

Effective value source template

New Client Setup

Value path

Template #

Template Name

8 New Client Setup

Name

Acc.Mgr

Tax Total

Currency

1

Managed...

Insert

	Stock Code	Stock	Qty	Unit	Unit Qty	Price Ex.	Price Inc.	Disc %	Disc Price Ex.	Disc Price Inc.	Tax	Hide	Total Ex.
1	J2C.NS	Jim2 Cloud New Site Summary	1	UNIT	1	0.00	0.00	0	0.00	0.00	G	<input type="checkbox"/>	0.00
2	J2C.NS27	Initial Jim2 data gathering	1	UNIT	1	0.00	0.00	0	0.00	0.00	G	<input type="checkbox"/>	0.00

Above, we have added Kits with 'apply stock' checklists. The mouse-over pop-up for Cust Ref# now tells us that, while the result is the same 'Cust Ref obtained from Project', it is now configured slightly differently, and is applied here at Template level:

Effective value source template = New Client Setup
Value Path = Template #8 New Client Setup

See over for explanation of background colours.

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Updating the Template

First, decide what you need to add to this template specifically, and what can be left alone to use inherited values.

Select the 'Change Template' button to move from 'Preview' to 'Edit' mode, and make your changes.

The following image shows you the template in 'Edit' mode:

Editing Template 9			
Template#	9	Template	New Client Setup
.Template Restrictions.			
Action	<Unrestricted>	Level	<Unrestricted>
Cust #	...	Status	...
Cust Ref#	...	From#	...
Our Ref	JIM2 CLOUD	Ship#	...
Item#	S.CLOUD.NS	Item Desc.	Jim2 Cloud NBew Client Setup
Date Due	...	Req Days	...
	...	Hours	...

You will notice that next to each data field there is an icon. When you hover over and select the icon, you will cycle through the available options for that field.

- Yellow** This means we have set the value here at the template level.
- Red** The value is being inherited from either the project, or a higher-level template association.
- Green** The value is coming from the default on the CardFile.
- Blue** The value is coming from a default source such as stock code, Item code or logged on user.
- White** There is no value, and the value on the job will have no value when created.

You will also see some other important settings:

- Active** – Whether the template is active and can be used.
- Billing Job** – Checked only when the template is being used for billing job creation.
- Shared** – Whether this template can be shared, and thus potentially used by many projects.
- Not Shared** – Generally used by billing jobs with project contract specific settings and stock.

Action and Level Restrictions:

Action – This template can only be associated to the Action specified here.

Level – Further restriction of where the template can be used.

- **Project** – can only be used on a specified Project.
- **Project Type** – can only be used on a specified Project Type.
- **Project System Type** – very high level, ie. can only be used for Managed Service Type and not MPS (Machine) types.

Step 4. Template Rules and the Action Wizard

The Action Wizard is designed to help you through the process of creating templates and assigning templates to Actions at multiple levels.

Templates can be made available to Projects via the following:

- **Project System Type level** – all projects that fall under the Project System Type (ie. 'Machine' or 'Managed Service') will have access to templates associated at Project System Type level.
- **Project Type Level** – all projects with the same Project Type will have access to templates associated at Project Type level.
- **Project Level** – individual projects can have templates directly associated.
- **Ad Hoc** – using the Project List Action Wizard, the list of filtered projects can be associated to templates, and do not need to have the same Project level or System Type level when template restrictions do not prevent it. This has the same effect as going into each individual project and directly linking the project to the template in question.

The screenshot shows the 'Project List - 2' window. It features a top section with various filters and checkboxes, and a main table below. The table has columns for Project #, State, Cust#, Ship#, Customer Name, Contract Price Level, Project Type, Request Sent, Next Bill, Last Billed, and It. The bottom of the window contains a toolbar with buttons: Add, Edit, View, Run, Cancel, Bill Project, and Action Wizard. The Action Wizard button is highlighted with a red rectangle.

Project #	State	Cust#	Ship#	Customer Name	Contract Price Level	Project Type	Request Sent	Next Bill	Last Billed	It
95	Active	ABECK	ABECK	ABECK		Manage				
99	Active	CAIN.ABLE	CAIN.ABLE	Cain and Able	MPS Inc	Machine			31/03/2017	BI
100	Active	CAIN.ABLE	CAIN.ABLE	Cain and Able	MPS Inc	Machine			31/03/2010	BI
101	Billing Due	CAIN.ABLE	CAIN.ABLE	Cain and Able	MPS Inc	Master		31/03/2017		M
102	Billing Due	SMITH3	SMITH3	Smith, Smith and	TY Contract	Machine		16/04/2015	30/04/2010	C
103	Billing Due	ADV.KNOW	ADV.KNOW	Advance	MPS Inc	Machine		30/04/2017	31/03/2010	IF

* Template restrictions may prevent some associations from being applied.

A warning dialog box with a yellow triangle icon. The text reads: 'The selected Machines are of different system types. Only templates that apply to all Machine types can be used. Do you want to continue?'. There are 'Yes' and 'No' buttons at the bottom.

Note: Once you have finished the Action Wizard, select Refresh from the top left of the Jim2 screen to see the changes.

The wizard takes you through a series of steps to configure the various associations between Project Type, Action, and Project Template. To begin, go to **Projects > Template Rules** to display the 'Project Template Rules' window:

Action	Source Type	Source	Template #	Template Name	Item	Next Bill Source	Billed	New Template
Client Setup	Project Type	Jim2 Cloud	3	New Client	S.CLOUD.NS	Value	Manual	1 Template
Billing	Project Type	Jim2 Cloud	3	New Client	S.CLOUD.NS	Value	Manual	1 Template

The left-hand pane of the window provides a hierarchical view of Project Type and Action associations, and can be changed to your preference of 'By Project Type', 'By Action', or 'By Action Group'.

Selecting an Action or Project Type will display a list of the associated templates in the body of the Project Template Rules window.

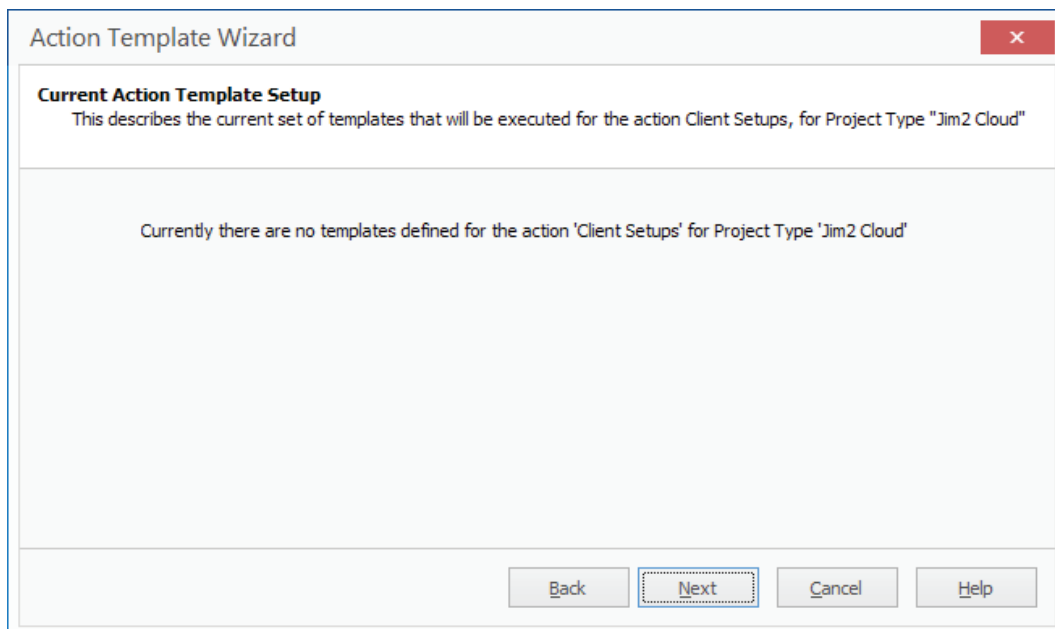
Using the Wizard, based on what we have discussed above:

1. Select Template Rules.
2. Highlight 'Jim2 Cloud' Project Type as per the screenshot above.
3. Select 'Edit' and click on Action Wizard.
4. The 'Select Action' window is displayed. Select 'Client Setups' from the drop-down as per the example below, then click 'Next'.

Action

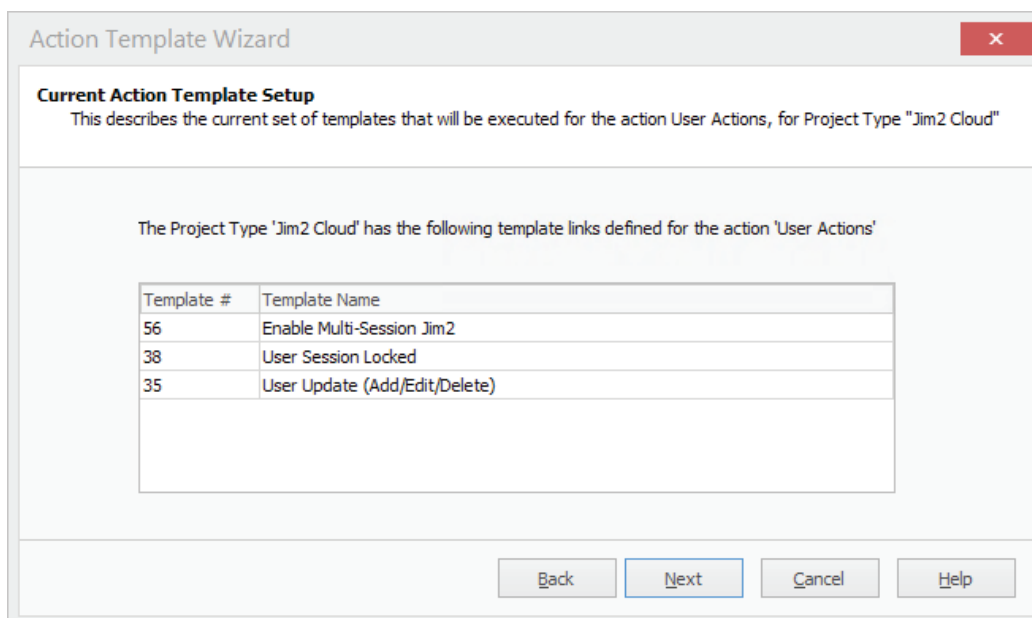
Client Setups
Billing
Client Setups
Consumable
Onsite
Remote
Workshop

5. The 'Current Template Setup' window is now displayed. As we have no existing templates associated you can simply select 'Next'.



****If the action already had templates assigned to it you would see a different window where the existing templates are displayed as per below:**

6. Selecting 'Next' on this screen will give you some self-explanatory choices as to how you wish to handle the template associations.



7. After selecting 'Next', where no templates are associated to the Client Setups:

Action Template Wizard

Change the Action Template Setup
Specify the way you would like to change the templates executed for the action User Actions, for Project Type 'Jim2 Cloud'

☐ Change so that no templates are executed for this action

☐ Change so that only a particular template is executed

☐ Change so that a new template is used in addition to existing templates

☐ Change so that a different template is used in place of an existing template

☐ Change so that an existing template is no longer executed

☐ Change so templates are no longer explicitly defined for Project Type 'Jim2 Cloud' but are inherited

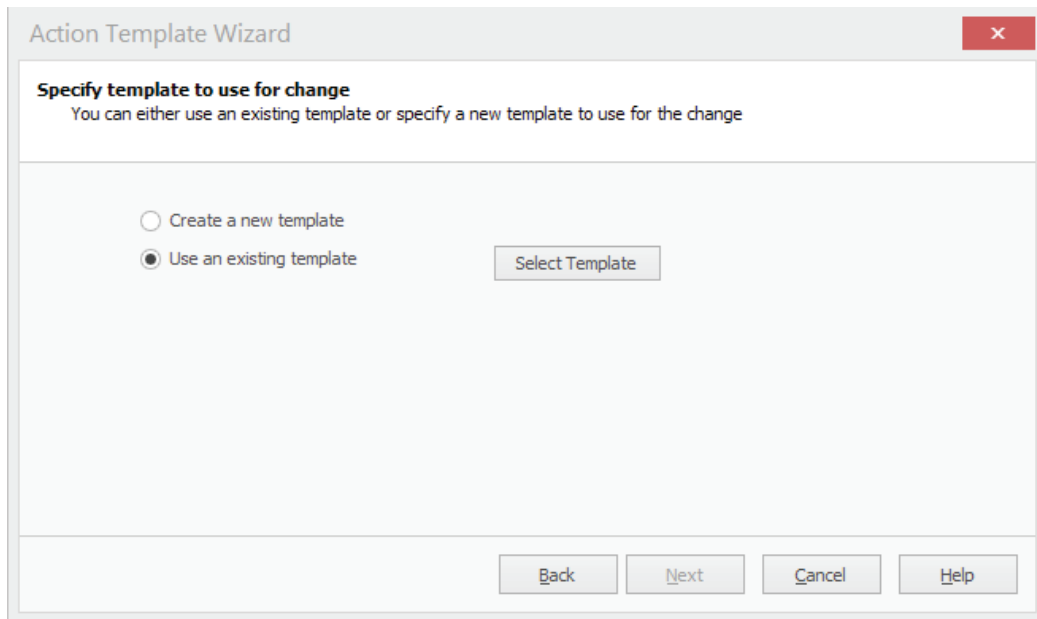
8. You have only one option to continue. Select the radio button and then 'Next'.

Action Template Wizard

Change the Action Template Setup
Specify the way you would like to change the templates executed for the action Client Setups, for Project Type 'Jim2 Cloud'

☒ Change so that only a particular template is executed

The 'Specify template to use for change' window is displayed:



Action Template Wizard

Specify template to use for change
You can either use an existing template or specify a new template to use for the change

☐ Create a new template

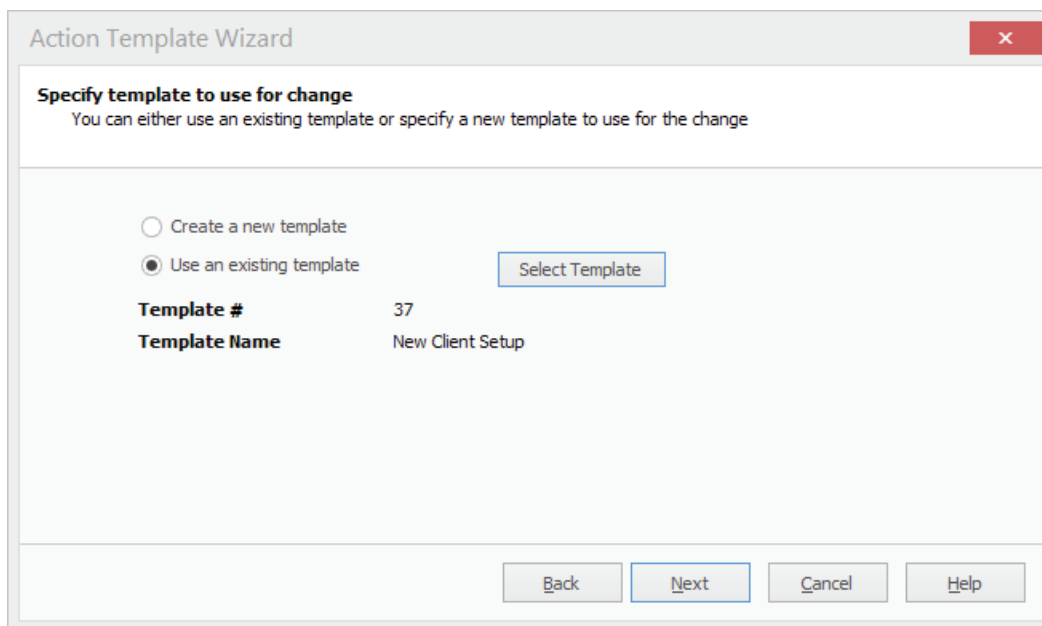
☒ Use an existing template

Select Template

Back Next Cancel Help

Here you can also create a new template. For this example, choose the 'Select Template' button to be presented with the 'Select Project Template' window.

It is worth getting familiar with this screen as it is used often. Scroll or search for the template 'New Client Setups', select it and then select 'OK'.



Action Template Wizard

Specify template to use for change
You can either use an existing template or specify a new template to use for the change

☐ Create a new template

☒ Use an existing template

Select Template

Template # 37
Template Name New Client Setup

Back Next Cancel Help

As above, you will now be displayed a confirmation of your selection. Select 'Next'.

Action Template Wizard

Default Template "Includes" when link is overridden with a new template
 If this link is overridden in the future with a new template, you can specify a default list of templates that the new template can include. This can allow you to set appropriate header defaults and add a default list of stock to the new template.

#	Template Name	Stock Lines
▶ 37	New Client Setup	... None

Buttons: Back, Next, Cancel, Help

Once you've made your choice, click **Next**. The 'When should this template be executed' window is displayed:

Action Template Wizard

When should this template be executed?
 Please specify when this template should be executed

☒ This template is not executed on a schedule and is manually invoked
☐ The schedule for this template's execution is controlled by the project's next bill cycle
☐ This template is executed on a custom schedule

Buttons: Back, Next, Cancel, Help

Here, you have the option to set a scheduling option. For non-billing templates, the option is generally the first, which is Manual, as per the image above.

The other options allow you to either configure the template to inherit its scheduled (billing) date from that of the project it is executed from, or to specify a custom date.

Action Template Wizard

When should this template be executed?
 Please specify when this template should be executed

☐ This template is not executed on a schedule and is manually invoked
☐ The schedule for this template's execution is controlled by the project's next bill cycle
☒ This template is executed on a custom schedule

Billed:
 On Day:
 Next Bill:

Select 'Next' to continue with the Manual option selected.

Action Template Wizard

×

Summary of Changes

Please review the proposed changes before finishing the wizard.

A new link will be created that specifies the following template:-

New Template:-

Template#: 37

Template Name: New Client Setup

Schedule: Manually executed

Back

Finish

Cancel

Help

As above, you will now be displayed a confirmation of your selection, select 'Finish'.

After selecting 'Finish', you will be brought back to the Project Template Rules:

Drag a column header here to group by that column

Action	Source Type	Source	Template #	Template Name	Item	Next Bill Source	Billed
Billing	Project Type	Jim2 Cloud	49	Jim2 Cloud Default Billing Template	Item on Project	Next Bill Settings on Projec	
File Actions	Project Type	Jim2 Cloud	60	Exports / Drag & Drop / Local File Acc	S.CLOUD.FILES	Value	Manual
File Actions	Project Type	Jim2 Cloud	59	MS Office Activation	S.CLOUD.OFFICE	Value	Manual
General Cloud Support Jo	Project Type	Jim2 Cloud	36	General Cloud Support Request	S.CLOUD	Value	Manual
User Actions	Project Type	Jim2 Cloud	56	Enable Multi-Session Jim2	S.CLOUD.MS	Value	Manual
User Actions	Project Type	Jim2 Cloud	38	User Session Locked	S.CLOUD.RS	Value	Manual
User Actions	Project Type	Jim2 Cloud	35	User Update (Add/Edit/Delete)	S.CLOUD.NU	Value	Manual
Client Setups	Project Type	Jim2 Cloud	37	New Client Setup	S.CLOUD.NS	Value	Manual

Add New Link

Add Action Link

Delete Link

Action Wizard

ancel

Save

As above, you can see the new association, and you **must** then select 'Save' to finalise the update to the rules.

Template Restrictions

When creating Project Templates, you can optionally restrict where a given template can be used from within a template using the 'Template Restrictions'.

Adding Template 3			
Template#	3	Template	
Template Restrictions			
Action	<Unrestricted>	Level	<Unrestricted>

During the upgrade process, you will see that the project-specific template has the restrictions applied, locking the template to a specific project:

Adding Template 3			
Template#	3	Template	Billing:Project:11552.NEWSLINK.AUS
Template Restrictions			
Action	Billing	Level	Project 11552.NEWSLINK.AUS ...

Template restriction setups:

Action – select an applicable action, and the template can only ever be associated to the action specified.

Level – Level allows you to take the restriction further, with three possible options:

1. **Project** – set to link the project directly to a single project only.
2. **Project Type** – set so the template can only be used by projects of the specified Project Type.
3. **Project System Type** – set so the template can only be used by projects of the specified Project System Type.

Once a level restriction is selected, you must also supply an appropriate value in the level value selector.

Project – prompts you to select a specific project.

Adding Template 3			
Template#	3	Template	
Template Restrictions			
Action	<Unrestricted>	Level	Project ...
Cust Ref#		Cust #	
Our Ref		From#	
Item#		Ship#	
Date Due		Item Desc.	
		Req Days	

Project Select
Project List Search
Search

Project Type – the 'Value' box will be changed to a drop-down, where you must select a project type.

Adding Template 3			
Template#	15	Template	
Template Restrictions			
Action	Onsite	Level	Project Type
Cust Ref#		Cust #	
Our Ref		From#	
Item#		Ship#	
Date Due		Item Desc.	
		Req Days	

Asset
IAAS
Machine
Managed Service
Onsite
Prepaid
Workshop

Project System Type – the 'Value' box will be changed to a drop-down, where you must select the project system type.

Adding Template 15			
Template#	15	Template	
Template Restrictions			
Action	Onsite	Level	Project System Type
Cust Ref#		Cust #	
Our Ref		From#	
Item#		Ship#	
		Item Desc.	

Asset
Machine
Managed Service
Master Machine
MS Prepaid Labour

You will also notice that, once you have selected an appropriate value, the option to 'Create Action Link' appears, and is ticked by default. When saved, the link to the applicable action (based on the restriction you have set) will be created for you, and you will not have to go to Template Rules to create it manually.

Adding Template 12

Template#

12

Template

Template Restrictions

Action

Onsite

Level

Project

6

...

Create Action Link

☒

Template Restrictions and included Template Inheritance

It is important to note that, when creating restrictions, the rules of Included Templates also apply. For example, if you were to set the restriction on a given template Action – Service, and the Included Template has a restriction of Action – Onsite, it would result in the following error when saving the template.

Error

Cannot save the template because it violates the included template action constraint.

Violated Action: Service

Violating Action: Onsite

Template Path:

TEST\Onsite MS Auto-created Template

OK

Step 5. Generating jobs using Project Templates

Now we have completed the setup, the template is ready to use. Either from an existing project or by creating a new one, ensure it has the appropriate Project Type (as per what you created in Step 2).

You can now select the template from the right-click menu on a Project list, from within a Project, or via a job that has being tagged to a project.

Via Project list:

Jim2 Cloud

Add Project to Non Report Group

Export Data

Print

Print Preview

Client Setups

File Actions

General Cloud Support Job

User Actions

Template Source: Jim2 Cloud (Project Type)

New Client Setup

01/01/2017	01/02/2017	Billing Due	BEM
11/01/2017	01/02/2017	Billing Due	CAFFE
01/01/2017	01/02/2017	Billing Due	DATA.
01/01/2017	01/02/2017	Billing Due	FI MIE

Via project:

Add Jobs

Add Billing

Jim2 Cloud

Client Setups

File Actions

General Cloud Support Job

User Actions

Template Source: Jim2 Cloud (Project Type)

New Client Setup

Via job when prompted after the project selection prompt:

Adding Service Job 3083072

Job#

3083072

Cust#

HAPPEN

...

Status

Booked

Cust Ref#

NIL

From#

HAPPEN

...

Priority

Normal

Mode

Ship#

HAPPEN

...

Type

Normal

Date In

10/02/2017

Due

13/02/2017 02:32PM

...

Out

Item#

...

Desc.

Our Ref#

Status Due

Project#

...

Fault Desc.

Invoice Desc.

GL Dept

Project Select

Project List

Search

Search & Filter

Project Code

Card Code

HAPPEN

...

Customer Name

Groups

Via job when prompted after the project selection prompt:

Adding Service Job 3082901

Job#	3082901	Cust#	BOM	Status	Proceed
Cust Ref#	RENEWAL	From#	BOM	Priority	Urgent
Mode		Ship#	BOM	Type	Non Billable
Date In	06/02/2017	Due	07/02/2017 11:59AM	Out	
Item#	S.CLOUD.NS	Desc.	Jim2 Cloud - New Client Setup		
Project#	BOM	Our Ref#	JIM2 CLOUD	Status Due	
Fault Desc.	Jim2 Cloud New Client Setup	Contract	Retail	Type	Jim2 Cloud
Invoice Desc.	Jim2 Cloud New Client Setup				
GL Dept					

Billing >
Jim2 Cloud >
Execute template...
Client Setups >
File Actions >
General Cloud Support Job >
User Actions >

📄 📅 Date Initials Status Inc Comment

The job is then created, and in this case left in 'Edit' mode ready for you to work on.

We could create a quantity of templates, and associate them to an Action. With the appropriate settings, the selection of the Action from the Project list or Project menu will initiate the creation of multiple jobs at a single click – great for IT projects, and here it Happen we use it for the creation of new implementation project jobs.

Step 6. Creating Billing Templates

Each project (contract) that requires manual or recurring billing requires at least one Billing Template to be associated.

Out of the box, any project that has a System Type of 'Managed Service' will automatically have a default Billing Template associated that is used for inheritance purposes, but cannot be used for the actual billing job creation process.

Create or open an existing managed services contract and select the 'Templates' tab.

Viewing Project 1

Project#	1	Cust#	6969	Status	Booked	Type	Test MS	Name	Pyotr Ilyich Tchaikovsky
Cust Ref	RENEWAL	Ship #	6969	Priority	Normal	<input type="checkbox"/> Individual Request		Acc.Mgr	FL
Billed	Monthly	Contract	Retail	Req Days		Hours		Request #	6969
On Day	1st of the month	Cont. In	21/01/2016	Warr. In				Request By	
Last Bill		Cont. Out		Warr. Out				Location	
Next Bill	01/02/2017	Avg Bills		Price Rev.				Ship Address	6969
Item#	SUB.JC.PE	Make		Currency	AUD	Rate	1.0000	<input type="checkbox"/> Lock Rate	
Model		Desc.	Happen Cloud	Serial#					
Groups	Happen Cloud			Comment					
Ex.Proj#									
Branch		GL Dept							

Templates

Name	Type
Billing	Action
Managed Service	Project System Type

Display Hierarchy: By Action
Include Links: Effective

Create Similar Edit Close Add Jobs

Active Job Invoiced Job Related Stock **Templates** Linked Projects Overview

Action	Source Type	Source	Template #	Template Name	Item	Next Bill Source	Billed	On Day	Next Bill	New Template Ind	Override?	Amount Ex.
Billing	Project	1	5	Billing Contract:10	SUB.JC.PE	Value	Manual			1 Template	Must override	\$250.00

As per the image above you can see that by default this new contract already has an association to a billing template, but the template has a setting of 'Must Override', and is shaded red.

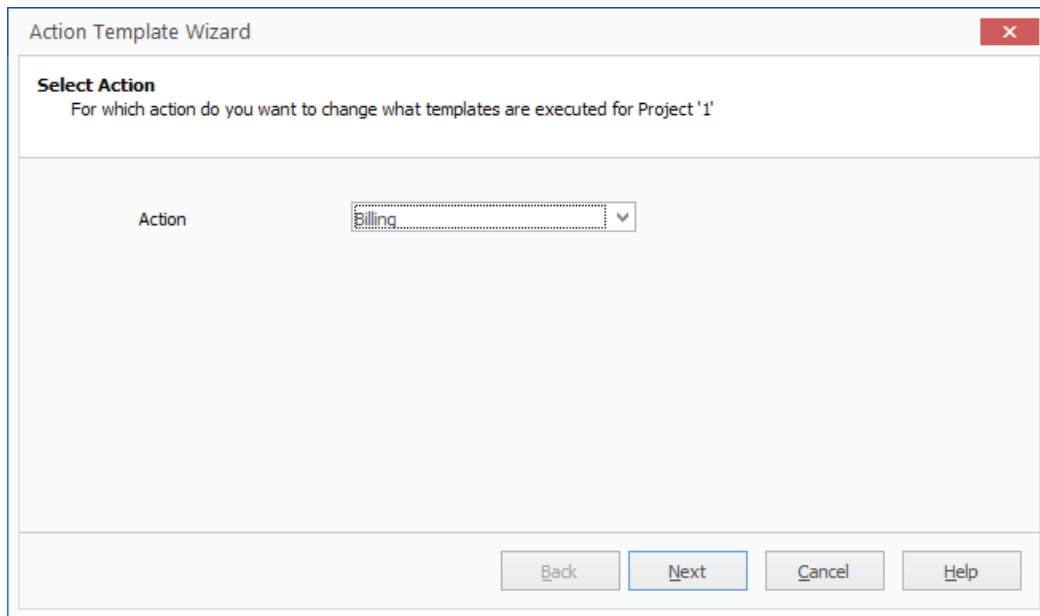
*If you open an existing project you will see the new project-specific billing template that has been created and associated to the project as part of the upgrade.

It is worth noting that you can double click on the default template and see exactly what has been configured, as well as what values would be inherited from this template should you use it as an Included Template.

This means you must create a project-specific Billing template before you can generate a billing job from this project.

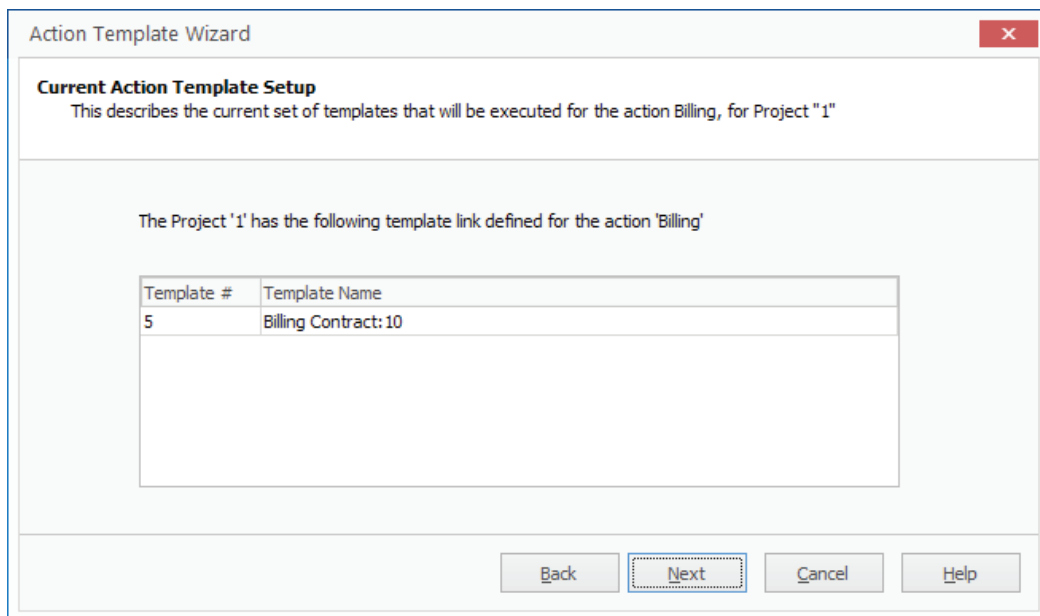
There are two ways to achieve this, but the simplest way is to select 'Edit', then select the 'Action Wizard'.

1. Select the 'Billing' action:



The screenshot shows the 'Action Template Wizard' window with the 'Select Action' step. The title bar says 'Action Template Wizard' with a close button. The main heading is 'Select Action' with the instruction 'For which action do you want to change what templates are executed for Project '1''. Below this, there is a label 'Action' and a dropdown menu showing 'Billing'. At the bottom, there are four buttons: 'Back', 'Next', 'Cancel', and 'Help'.

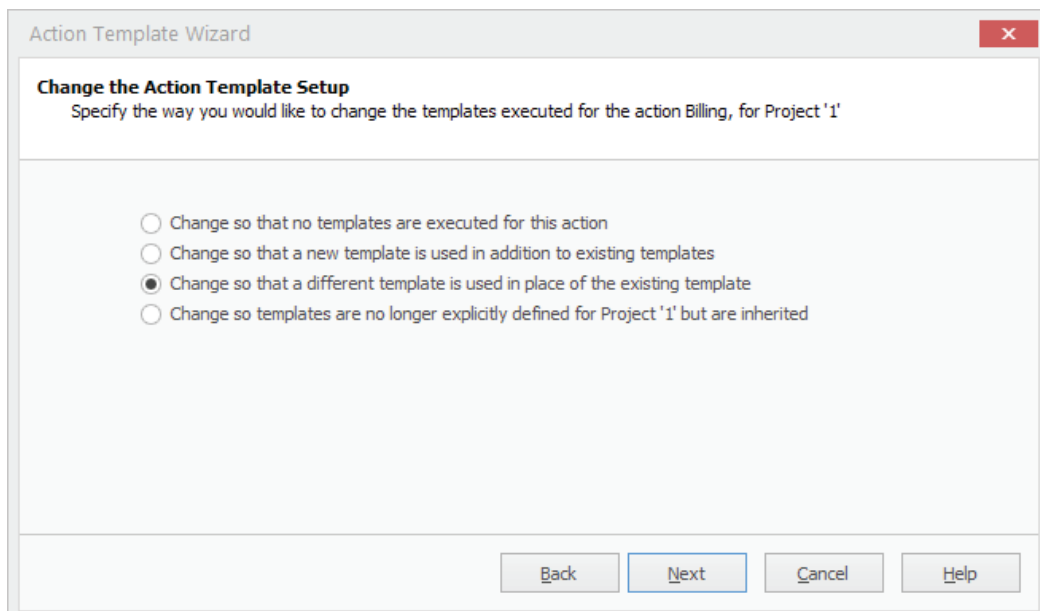
2. Confirmation of the default inheritance (this can be removed later):



The screenshot shows the 'Action Template Wizard' window with the 'Current Action Template Setup' step. The title bar says 'Action Template Wizard' with a close button. The main heading is 'Current Action Template Setup' with the instruction 'This describes the current set of templates that will be executed for the action Billing, for Project "1"'. Below this, it says 'The Project '1' has the following template link defined for the action 'Billing''. There is a table with two columns: 'Template #' and 'Template Name'. The table contains one row with '5' and 'Billing Contract: 10'. At the bottom, there are four buttons: 'Back', 'Next', 'Cancel', and 'Help'.

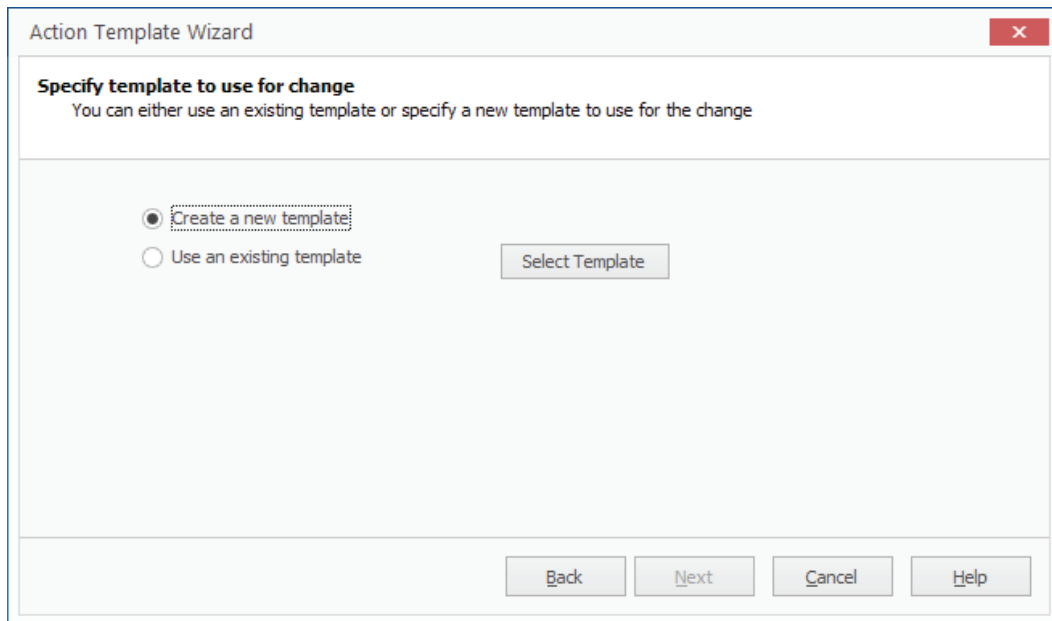
Template #	Template Name
5	Billing Contract: 10

3. Template Setup – select 'Change so that a different template is used in place of the existing template':



The screenshot shows the 'Action Template Wizard' window with the 'Change the Action Template Setup' step. The title bar says 'Action Template Wizard' with a close button. The main heading is 'Change the Action Template Setup' with the instruction 'Specify the way you would like to change the templates executed for the action Billing, for Project '1''. Below this, there are four radio button options: 'Change so that no templates are executed for this action', 'Change so that a new template is used in addition to existing templates', 'Change so that a different template is used in place of the existing template' (which is selected), and 'Change so templates are no longer explicitly defined for Project '1' but are inherited'. At the bottom, there are four buttons: 'Back', 'Next', 'Cancel', and 'Help'.

- Select the 'Create New Template' radio button – this will then initiate the new template creation:



Action Template Wizard

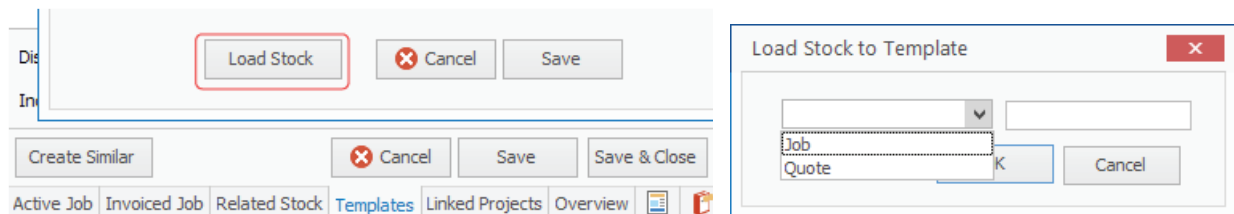
Specify template to use for change
You can either use an existing template or specify a new template to use for the change

☒ Create a new template
☐ Use an existing template

Select Template

Back Next Cancel Help

- Take note of the values in the Preview that are being inherited.
- Select the 'Create New' button.
- Select 'Billing Job' – **Important!**
- Enter any changes you wish to make to the header values.
- Add the stock to the grid.
- Kits are supported.
- Pricing can be overridden or inherited using the project contract pricing, or left to use the standard Jim2 pricing calculation when the billing job is created.
- You can use the 'Load Stock' option to load the grid with stock, quantities and pricing from an existing job, quote or template.



Dis
In

Load Stock Cancel Save

Create Similar Cancel Save Save & Close

Active Job Invoiced Job Related Stock **Templates** Linked Projects Overview

Load Stock to Template

Job
Quote

Cancel

When you click ok, 'Add Stock Lines' will pop up, showing what you have selected to add. You have the ability to show attributes or delete stock from the preview at this point.

Add Stock Lines

	Stock Code	Stock Description
1	HEADING	Jim2® Business Engine
2	JC	scription - per month
3	C.MPS	on Cloud Subscription
4		
5	HEADING	Jim2® Professional Services
6	P.SERVICES	Jim2® Professional Services for Data Migration, Implementation and Training
7	L.ANALYSIS	Professional Services hours - Jim2® Analysis and Consulting - Prepaid labour for assistance via Email, Phone or remote to assist with y
8		

Delete
 Show Attributes

- The Template Name has been created for you, and we recommend this convention, but it can be changed at any time.
- Note that we have left the included template to save time and future administration, by inheriting the default values from the Managed Services Default Billing Template. You could remove this by right clicking on the Included Template name and left clicking 'Delete'.

Adding Template 5

Template# 5 Template Billing Contract: 10 ☒ Active

Template Restrictions

Action Billing Level Project

Cust # ... Status Ready Name GT

Cust Ref# ... From# ... Priority Price level Acc.Mgr

Our Ref ... Ship# ... Type Tax Paid Tax Total

Item# ... Item Desc. Item Auto Add Currency

Date Due ... Req Days Hours Serial No

Fault Desc. ... Included Templates

Inv Desc. This is now set at the template level

Branch ... GL Dept

Stock	Stock Code	Stock	Qty	Unit	Unit Qty	Price Ex.	Price Inc.	Disc %	Disc Price Ex.	Disc Price Inc.	Tax	Hide	Total Ex.	Total Inc.	Disc Total Ex
1	DOM.HOST	Domain Hosting	1	UNIT	1	250.00	275.00	0	250.00	275.00	G		250.00	275.00	250.00

Create Similar Cancel Save Save & Close Clear Context View Results

Sub Total \$ 250.00
Tax \$ 25.00
Total \$ (???) 275.00

Stock Projects 0 References 0

Once you have made your changes, select 'View Results' so you can see exactly what this template will use when creating a billing job.

Adding Template 5

Template# 5 Template Billing Contract: 10 ☒ Active

Template Restrictions

Action Billing Level Contract 1

Cust # DAYCOM Status FINISH Ready Name GT

Cust Ref# ... From# DAYCOM Priority Normal Price level Retail Acc.Mgr

Our Ref ... Ship# DAYCOM Type Tax Paid Tax Total Tax F

Item# ... Item Desc. Item Auto Add Currency AUD

Date Due ... Req Days 3 Hours 0 Serial No

Fault Desc. Managed Service Billing Included Templates

Inv Desc. This is now set at the template level

Branch ... GL Dept

Stock	Stock Code	Stock	Qty	Unit	Unit Qty	Price Ex.	Price Inc.	Disc %	Disc Price Ex.	Disc Price Inc.	Tax	Hide	Total Ex.	Total Inc.	Disc Total Ex
1	DOM.HOST	Domain Hosting	1	UNIT	1	250.00	275.00	0	250.00	275.00	G		250.00	275.00	250.00

Select 'Save' to return to the wizard, and confirmation of your choice. Select 'Next'.

The screenshot shows a window titled "Action Template Wizard" with a close button in the top right corner. The main heading is "New Template 'Includes'". Below it is a descriptive paragraph: "Templates can have field value defaults set by 'including' other templates that contain these defined values. Including an appropriate template with common defaults allows you to change only what is specific to this particular template." Below the text is a table with two rows: "Template #" with value "38" and "Template Name" with value "Billing:Contract:10". At the bottom of the window are four buttons: "Back", "Next" (highlighted with a blue border), "Cancel", and "Help".

Template #	38
Template Name	Billing:Contract:10

Click 'Next' to see the Override Options window.

The screenshot shows the same "Action Template Wizard" window, now at the "Override Options" step. The heading is "Override Options" with a subtext: "Specify if and how these template definitions can be overridden". Below this is a list of three radio button options: "Normal inheritance", "Must override", and "Cannot override". At the bottom are four buttons: "Back", "Next", "Cancel", and "Help".

Select from one of these three options:

- **Normal inheritance** – this option would be used for most Shared Non-Billing templates and Billing templates that are specific to a particular project.
- **Must override** – this is used by the Jim2 Default Template, and ensures that the template cannot actually be used for the generation of a job. When at Project level, you will see templates in the grid are shaded pink.
- **Cannot override** – this ensures this specific template is used in the creation of a given job.

Once you've made your choice, click 'Next'. Select and enter the scheduled billing information, if appropriate.

Action Template Wizard

When should this template be executed?

Please specify when this template should be executed

☐ This template is not executed on a schedule and is manually invoked

☒ The schedule for this template's execution is controlled by the project's next bill cycle

☐ This template is executed on a custom schedule

Back

Next

Cancel

Help

Above we have selected to inherit the schedule from the project, but there are cases where this is not appropriate, and a custom date needs to be configured. If you bill manually from the contract, then you can select the Manual option.

Confirm the configuration by selecting 'Finish', and you will be returned to the Project Template tab. Select 'Save' to save the work we have done to the project, and you are now ready to bill from the project.

Generating the Billing Job can be done via:

Project list

Project List - 3

Project#

...

Cust#

...

Status

...

Type

...

Active

☒

Serial#

...

Ship#

...

Master#

...

Request By

...

Request Sent

☒

Cust Ref

...

Contract

...

Last Billed <

...

Name

...

Billing Due

☒

Billed

...

Next Billed <

...

Request Sent <

...

Finish

☐

Item#

...

Make

...

Model

...

Avg Bills

...

Consolidated

☐

Branch

...

SubBranch

...

GL Dept

...

Drag a column header here to group by that column

Project #	State	Cust#	Ship#	Customer Name	Contract Price Level	Project Type	Request Sent	Next Bill	Last Billed	Item #	Item Desc
1	Billing Due	CHECKERS	CHECKERS	Checkers Printers	FIN Ex	Machine		01/07/2016		MS.BILLING	Managed Ser
2	Billing Due	ADV.KNOW	ADV.KNOW	Advance	Retail	Manage		30/01/2017	28/07/2016	MS.BILLING	Managed Ser
3	Active	ADV.KNOW	ADV.KNOW	Advance	Retail	MS			28/07/2016	PREPAID	Prepaid Man
4	Billing Due	ADV.KNOW	ADV.KNOW	Advance	Retail	Manage		28/10/2016	01/08/2016	MS.BILLING	Managed Ser
5	Billing Due	ADV.KNOW	ADV.KNOW	Advance	Retail	MS		28/10/2016	05/09/2016	PREPAID	Prepaid Labo
6	Billing Due	ADV.KNOW	ADV.KNOW	Advance	Retail	Master		01/09/2016		MS.BILLING	Managed Ser
7	Billing Due	ADV.KNOW	ADV.KNOW	Advance	Retail	Machine		02/09/2016		FRX.CM305	Fuji Xerox C
8	Billing Due	ADV.KNOW	ADV.KNOW	Advance	CPC Inc	Colour		05/08/2016		MPC300	Ricoh Aficio
9	Active	ABECSHIP01	ABECSHIP0	Abeck Victoria	MS -	MS -				MS.BILLING	Managed Ser
10	Active	ADV.KNOW	ADV.KNOW	Advance	Retail	Manage			01/09/2016	MS.BILLING	Managed Ser
11	Active	ADV.KNOW	ADV.KNOW	Advance	Retail	MS -				MS.BILLING	Managed Ser
12	Active	ADV.KNOW	ADV.KNOW	Advance	Retail	MS -				MS.BILLING	Managed Ser
13	Billing Due	ADV.KNOW	ADV.KNOW	Advance	Retail	MS		11/10/2016		MS.BILLING	Managed Ser
14	Active	ADV.KNOW	ADV.KNOW	Advance	Retail	MS				MS.BILLING	Managed Ser

Add

Edit

View

Run

Cancel

Bill Project

Project List via right click menu

Project List - 4

Project#	...	Cust#	...	Status	...	Type	...
Serial#	...	Ship#	...	Master #	...	Request By	...
Cust Ref	...	Contract	...	Last Billed <	...	Name	...
		Billed	...	Next Billed <	...	Request Sent <	...
Item#	...	Make	...	Model	...	Avg Bills	...
Branch	...	SubBranch	...	GL Dept	...		

Drag a column header here to group by that column

Project #	State	Cust#	Ship#	Customer Name	Contract Price Level	Project Type	Request Sent	Next Bill
2	Billing Due	ADV.KNOW	ADV.KNOW	Advance	Retail	Manage		30/01/2017
4	Billing Due	ADV	View	F2	Retail	Manage		28/10/2016
10	Active	ADV	Edit	F9	Retail	Manage		
15	Active	ADV				Manage		
16	Active	ADV			MS -	Manage		

View Customer # ADV.KNOW

View Ship # ADV.KNOW

Billing Ctrl+B ▶ Template Source: 2 (Project)

Onsite Ctrl+J ▶ Next Bill: Next Bill Settings on Project

Remote ▶ Billing:Machine:2

Within Project

Viewing Project 4

Project#	4	Cust#	ADV.KNOW	Status	Booked	Type	Managed Service	Name	
Cust Ref	2234	Ship #	ADV.KNOW	Priority	Normal		Individual Request	Acc.Mgr	
Billed	Monthly	Contract	Retail	Req Days		Hours	Request #	ADV.KNOW	Attn: Pixie Strawberry
On Day		Cont. In	28/07/2016	Warr. In			Request By		Req To
Last Bill	28/09/2016	Cont. Out		Warr. Out			Location		
Next Bill	28/10/2016	Avg Bills		Price Rev.			Ship Address	Advance Knowledge	
Item#	MS.BILLING	Make		Currency	AUD	Rate	1.0000	Lock Rate	
Model		Desc.	Managed Service Billing				Serial#		...
Groups	No groups assigned			Comment	Terms and Conditions				
Ex.Proj#									
Branch		SubBranch		GL Dept					

Active Job

Drag a column header here to group by that column

Job#	Type	Status	Cust#	Cust Ref#	Fault Description	Date Out	Item#	Item Desc
203	Normal	Booked	ADV.KNOW	2234	Managed Service Billing	14/09/2016		
180	Billing	FINISH	ADV.KNOW	2234	Managed Service Billing	01/08/2016	MS.BILLING	Managed S

Create Similar Edit Close Add Jobs Add Billing

*Generation of billing jobs with recurring schedules cannot be performed at job level; they must be created from the Project or Project list.

New Template Functionality for flexible creation of jobs of any type

Included Templates (template inheritance)

Included Templates allow values configured in one template to be inherited by another template, and combine to be used as part of the job creation process. The use of template inheritance is completely optional, but as the quantity of projects grow, the greater the case for using template inheritance becomes. When upgrading from any Jim2 version 4.0 build with Managed Services licensed, two templates are created and linked (included templates) to the project-specific billing templates as part of the process.

For each project where a billing template has been created, each template has an included template called the Managed Services Default Template.

When viewing the Managed Services Default Template, you will see that it has an included template called the Default Template.

Viewing Template 1

Template#1

TemplateManaged Services Default Template

☒ Active

Template Restrictions

☐ Billing

☒ Share

Action<Unrestricted>

Level<Unrestricted>

Cust #

Cust Ref#

Our Ref

Item#

Date Due

Fault Desc.

Inv Desc.

Branch

Cust #

From#

Ship#

Item Desc.

Req Days

Managed Service Billing

Managed Service Billing

SubBranch

Status

Priority

Type

Hours

30

GL Dept

Ready

Price level

Tax Paid

Item Auto Add

Serial No

Included Templates

Name

Acc.Mgr

Tax Total

Currency

2

Default Template

...

Apper

Stock

Stock Code	Stock	Qty	Unit	Unit Qty	Price Ex.	Price Inc.	Disc %	Disc Price Ex.	Disc Price Inc.	Tax	Hide	Total Ex.	Total Inc.
------------	-------	-----	------	----------	-----------	------------	--------	----------------	-----------------	-----	------	-----------	------------

Create Similar

Edit

Close

Clear Context

Sub Total \$

Tax \$

Total \$ (???)

Stock

>> jects 0

References 0

The included template can be changed to any other shared template. There can be an unlimited number of completely separate sets of inheritance trees in place, and an unlimited number of included templates applied to a template. In addition to project header value inheritance, stock lines and associated values can also be inherited.

Examples:

1. All non-billing jobs that are linked to a project are to be created with a status of 'Assigned', rather than 'Booked' The most efficient way to achieve this is to change the value of the status in the Default Template to 'Assigned'.
2. You have three hundred contracts that have exactly the same stock and stock quantity. In this case, you would be better to create a single contract template with the stock and quantity configured, link all three hundred contracts (Included Template), and inherit that stock data rather than configuring it specifically at each contract project-specific billing template. Then, should you need to change or add stock to this type of contract in the future, the change can be made in one place rather than having to update all three hundred individually. It is worth noting that the template to job creation process will use normal Jim2 pricing rules. You do not need to set a specific price override at template level unless you want to. When the billing job creation is performed, all three hundred jobs are created with the same stock, quantity and selling price based on whatever has been set up in the Jim2 pricing rules you have configured.

When a job is created from a template, the creation process first checks the project-specific template. If it finds a value for a given field, it will be used. It then checks for any included templates. If found, it will look for any value it did not find in the project-specific template. If found in the first included template, this will be used.

The order of inheritance for a given field value is as follows:

1. A value configured on the template, either explicitly or from the linked project.
2. A value found in the first included template in the included templates list on the template.
3. A value found in the first included template list of included templates. This extends to as many included templates that are found.
4. A value found in the next included template in the included templated list on the template.
5. And so on, as jim2 works through the configured included templates until it either finds a value or doesn't.
6. The first value found in the process is used, and the process stops.

Example 1

Project Template (has no value for status configured)

Included template1 within project template

- First included template within included template1
- Second included template within included template1

- First included template within included template2
- Second included template within included template2 (status value of XYZ configure)

- First included template within included template1
- Second included template within included template1 (status value of UVW configure)

- First included template within included template2
- Second included template within included template2 (status value of XYZ configure)

- First included template within included template1
- Second included template within included template1 (status value of UVW configure)

- First included template within included template2
- Second included template within included template2 (status value of XYZ configure)

- First included template within included template1
- Second included template within included template1 (status value of UVW configure)

- First included template within included template2
- Second included template within included template2 (status value of XYZ configure)

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Project template creation and setup examples

Existing Jim2 user migrating to MS Edition with Templates (Billing Templates)

This example is included to help existing clients that have been using jobs and the 'Create Similar' function to manage the recurring billing of contracts, and are looking to move to the new Managed Services feature to gain greater efficiency in the billing process.

This example is designed to get you up and running as fast as possible with the new billing template process.

Step 1 – Managed Service Type Creation

Create one Managed Service Type for each Managed Service offering. Go to **Tools > Setups > Projects > Project Types**, and add the following: (all should be of System Type 'Managed Service'):

MS Exchange
MS Security
MS Internet
MS IT Services
Managed Service

Note: If you wish to have all Managed Services on a single client contract, you may opt to have a single, more generic Managed Service Type, such as 'Managed Services'.

The main implication of doing this would be that it is no longer possible to easily analyse actual labour/contract profitability at a product offering level, as actual time logged cannot be allocated to the individual parts of the contract. For example, how much actual time (and theoretical cost) was spent servicing one product versus another in your range, and how much did you bill for each?


The upside is fewer projects per client, but this is not generally an issue given the flexibility in which they can all be billed on the same monthly invoice using existing Jim2 bulk invoicing capability.

Once completed, move to the next step of creating your client projects and project-specific billing templates

Step 2 – Create your Projects (Contracts) and Contract specific billing templates

Go to **Projects > Add Project**.

- Create a project (contract) and update required header information as applicable.

Adding Project 3										Advance Knowledge 		>
Project#	3	Cust#	ADV.KNOW ...	Status	Booked	Type	MS EXCHANGE	Name	FL			
Cust Ref	MS.EXCHANGE	Ship #	ADV.KNOW ...	Priority	Normal	<input type="checkbox"/> Individual Request		Acc.Mgr	GT			
Billed	Monthly	Contract	Retail	Req Days		Hours		Request #	ADV.KNOW ...	Attn:	Pixie Strawber	
On Day		Cont. In	17/02/2017	Warr. In				Request By		Req To		
Last Bill		Cont. Out		Warr. Out				Location				
Next Bill	17/02/2017	Avg Bills		Price Rev.				Ship Address	Advance Knowledge			
Item#	MS.BILLING ...	Make										
Model		Desc.	Managed Service Billing					Serial#				
Groups												
Ex.Proj#	...											
Branch		GL Dept										

- Select 'Save', and then 'Edit'.
- Select the Templates tab on the project. You will notice the Billing line is highlighted in red. This is to alert you to the need to create a contract-specific version of your billing contract template.
- Select 'Edit' and then the 'Action Wizard'.
- Select 'Billing' from the drop-down, then 'Next' (select Action Window).
- Select 'Next'. This window is just letting you know you will inherit values (Current Action Template setup window).
- Select 'Change so that a different template is used in place of the existing Template', then 'Next' (Change the Action Template Setup Window).
- Select 'Create a new template'. You will be prompted with the new template in 'Preview' mode:

Adding Template 10 (Context:Project:3, Bill Date:17/02/2017)

Template# 10 Template Billing:Project:2

Template Restrictions

Action Billing Level Project 2

Cust # From # Ship# Item Desc. Req Days Hours

Cust Ref# Our Ref Item# Date Due

Status Ready Price level Tax Paid Item Auto Add Serial No

Priority Type

Fault Desc. Managed Service Billing

Inv Desc. Managed Service Billing

Branch GL Dept

Included Templates

#	Template Name	Sto
1	Managed Services Default Template	ins

	Stock Code	Stock	Qty	Unit	Unit Qty	Price Ex.	Price Inc.	Disc %	Disc Price Ex.	Disc Price Inc.	Tax	Hide	Total Ex.
1													

Load Stock Cancel Save View Results

Sub Total \$
Tax \$
Total \$ (???)

- Select 'Load Stock' and you will be prompted for an existing Job# to load the stock from.
 - Enter the Job# for the job you currently use to bill this client the 'old' way.
 - All stock lines will be brought across once you confirm.
 - Edit the stock lines as applicable, and ensure they are set out exactly how you wish them to appear on a billing job.
 - Check your pricing and quantities.
 - Make any other client-specific changes to the template, if required.
 - Select 'Save'.
- Select 'Next' to confirm the change (Specify template to use for change window).
- Select the 'Billing Date' option and 'Next'. This is most often controlled by the project's next bill date ('When should this template be executed' window).
- Select 'Finish' to complete the process.
- Repeat this process for each of your projects (contracts).
- You have now completed all steps, and are ready for invoicing.

The billing process has not changed. Billing jobs are created from projects at the appropriate time during the month, and are set to 'Ready' for the next invoicing run.

Refer to this link for more information – http://jim2help.happen.biz/managed_services_edition.html

Existing Jim2 user – Existing Managed Services users moving to new Managed Services template billing

This section is included to help existing clients currently using the Managed Services Edition (Projects) for billing to understand what changes they should be immediately aware of, and how to fast track to the use of the new template billing model post upgrade.

During the v4.1 upgrade process, all existing projects with stock lines contained within the Default Stock tab will have a project-specific template created for them. This is to ensure that billing can continue without any change or update required.

The Templates tab of each existing contract will now show the applicable billing template, which can be viewed and edited as appropriate.

Other examples in these release notes should provide the information required to further streamline and assist the billing template management.

As mentioned in the Template Inheritance with 'Included Templates' section, we have set up some default inheritances that we feel best fit most situations.

Prior to performing the v4.1 upgrade, restore your production Jim2 accounts database to Jim_Training. Refer http://jim2help.happen.biz/jim2_technical_knowledge_base_create_training_database.html for information on how to do this. Run the upgrade installer, and ensure you select to have both databases upgraded.

Log in to the Training Database.

The first thing you will notice when running a project list is that all the projects with billing stock will have a contract value in the 'Billing Total Ex.' column. You will also see the Billing Total in project lists and the billing template itself.

Checking the templates

You can view the template via the Template tab on the project,

Action	Source Type	Source	Template #	Template Name	Item	Next Bill Source
Billing	Project	2	3	Billing:Machine:2		Next Bill Settings on Pro
Onsite	Project System Type	Managed Service	25	SLA:Onsite: High - 4 Hours	SLA-ONSITE	Value
Onsite	Project System Type	Managed Service	23	SLA:Onsite:Low - 7 Days	SLA-ONSITE	Value
Onsite	Project System Type	Managed Service	26	SLA:Onsite:Low - 7 Days	SLA-ONSITE	Value
Onsite	Project System Type	Managed Service	24	SLA:Onsite:Normal - 8 Hours	SLA-ONSITE	Value
Remote	Project System Type	Managed Service	28	SLA:Remote:High - 4 Hours	SLA-ONSITE	Value
Remote	Project System Type	Managed Service	27	SLA:Remote:Normal - 8 Hours	SLA-ONSITE	Value
Remote	Project System Type	Managed Service	29	SLA:Remote:Urgent - 2 Hours	SLA-ONSITE	Value

or you can view them all via the ribbon.

Select **Projects > Template List**.

Update the view filter to show both shared and unshared templates, then 'Run' the list.

Template # [] Template Name [] Project System Type [v] [x] Enabled

Item [] Job Type [v] Project Type [v] [x] Shared

Template Restrictions [] Exclude Compatible [] Exclude Compatible

Review the templates and ensure they look as you expect. Take note of the default inheritance and how it applies to your templates. You should now log in to the training database and perform a billing job creation run from a project list or at project Level, as per normal practice.

Run a list of the created billing jobs, and review to ensure they are correctly representing the contract header and template stock values you expected. Once you are happy the jobs are being created for billing correctly, you should make any identified changes to your production environment in preparation for the next billing run.

While not required immediately, work through the other examples within your training database. Look at how you can better streamline ongoing job creation requirements. Our new online help has a section for the Managed Services Edition, which we also recommend you read to ensure you are up to speed with all related setups and functionality of this feature. Ref: http://jim2help.happen.biz/managed_services_edition.html

Managed Services and Managed Print Services Edition – New Non-Billing Template Setup and Usage

Relates to all Jim2 users running Managed Services and/or Managed Print Services functionality. This example will take you through the concepts and process of configuring non-billing based templates for use in SLA-based job creation and updates.

In this example, we will create a new set of templates that can be used for quickly creating or updating jobs with correct Service Level Agreement job data. The fields you use will be specific to your business and data capture requirements.

Go to **Tools > Setups > Actions**.

Create an Action Group Called SLA and configure to only allow execution at 'Child Action Level'.

The screenshot shows the 'Actions' configuration form. The 'Action Name' field is set to 'SLA'. The 'Action Type' is 'Action Group'. The 'Execute From' dropdown is 'Project and Project list'. The 'Allow Execution of' dropdown is 'Child Action Only'. There is a 'Child Action Check' button. At the bottom are 'Save', 'Cancel', 'Delete', 'View', and 'Close' buttons.

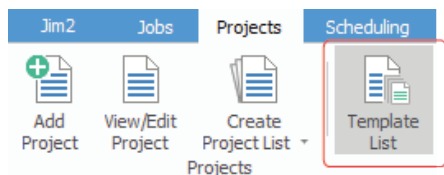
Create a new action called SLA-Remote linked to the Action group SLA above, and restrict the template so it can only be executed from the Action Group at Template Level.

The screenshot shows the 'Actions' configuration form for 'SLA-Remote'. The 'Action Name' is 'SLA-Remote'. The 'Action Type' is 'Action'. The 'Execute From' dropdown is 'Project and Project list'. The 'Allow Execution of' dropdown is 'Template Only'. The 'Action Groups' dropdown is 'SLA'. The 'After Execution' dropdown is 'Leave in edit mode'. The 'Watch Note' dropdown is 'Add Service Job'. At the bottom are 'Save', 'Cancel', 'Delete', 'View', and 'Close' buttons.

Create a new action called SLA-Onsite linked to the Action group SLA above and restrict the template so it can only be executed from the Action Group at Template Level.

The screenshot shows the 'Actions' configuration form for 'SLA-Onsite'. The 'Action Name' is 'SLA-Onsite'. The 'Action Type' is 'Action'. The 'Execute From' dropdown is 'Project and Project list'. The 'Allow Execution of' dropdown is 'Template Only'. The 'Action Groups' dropdown is 'SLA'. The 'After Execution' dropdown is 'Leave in edit mode'. The 'Watch Note' dropdown is 'Add Service Job'. At the bottom are 'Save', 'Cancel', 'Delete', 'View', and 'Close' buttons.

Create the following templates via the Project Template List. Go to **Projects > Template List**.



Select Add, then configure name, and save the first template.

Use the Create Similar function and save the additional templates, updating each as appropriate.

Template Name	Item	Due Date	Priority	Job Type
SLA:Onsite:Low – 7 Days	SLA-ONSITE	Now + 7 Days	SLA-Low	SLA-ONSITE
SLA:Onsite:Normal – 8 Hours	SLA-ONSITE	Now + 8 Hours	SLA-Normal	SLA-ONSITE
SLA:Onsite:High – 4 Hours	SLA-ONSITE	Now + 4 Hours	SLA-High	SLA-ONSITE
SLA:Onsite:Urgent – 2 Hours	SLA-ONSITE	Now + 2 Hours	SLA-Urgent	SLA-ONSITE
SLA:Remote:Low - 7 Days	SLA-REMOTE	Now + 7 Days	SLA-Low	SLA-REMOTE
SLA:Remote:Normal – 8 Hours	SLA-REMOTE	Now + 8 Hours	SLA-Normal	SLA-REMOTE
SLA:Remote:High – 4 Hours	SLA-REMOTE	Now + 4 Hours	SLA-High	SLA-REMOTE
SLA:Remote:Urgent – 2 Hours	SLA-REMOTE	Now + 2 Hours	SLA-Urgent	SLA-REMOTE

Example of SLA:Onsite:Low – 7 Days setup:

Editing Template 23

Template# 23 Template SLA:Onsite:Low - 7 Days

Template Restrictions:

Action Onsite Level Project System Managed Service

Cust # ... Status Ready

Cust Ref# ... From# ... Priority SLA-Low Price level

Our Ref ... Ship# ... Type SLA-ONSITE Tax Paid

Item# SLA-ONSITE Item Desc. Item Auto Add

Date Due **Date Due**

Value on this template:
Date In + Days + Hours

Fault Desc.

Inv Desc.

Branch SubBranch GL Dept

Active ☒ Billing Job ☐ Shared ☒

Name Acc.Mgr Tax Total Currency

Templates

#	Template Name	Stock Lines
...	...	None

Now we will link the new templates to the new Action using the Action Wizard.

Go to **Projects > Template Rules:**

- Select 'Edit', then Action Wizard.
- Select SLA Onsite from the drop-down and select 'Next'.
- Select 'Next' on the Current Action Template Setup (the first time there will be no option to select).
- Select the 'Change so that only a particular template is executed', then 'Next'.
- Select the 'Select Template' button, then from the list select the first of the SLA Onsite templates we created above. Click 'OK' to select and continue.
- Select 'Next' to confirm your selection.
- Select 'Manual' execution.
- Select 'Finish' to complete the configuration.

Now add the remaining templates:

- Select the Action Wizard.
- Select SLA Onsite from the drop-down then select 'Next'.
- You will now see that the template previously associated is displayed. Select 'Next'.
- Select 'Change so that a new template is used in addition to existing templates'.
- Select 'Select Template', then select the new template previously created.
- As done previously, finish the wizard and set the template for 'Manual' selection.
- Repeat the process for the remaining templates, then the same for the SLA-Remote Action.
- Ensure you click 'Save' when you have completed the template linking.

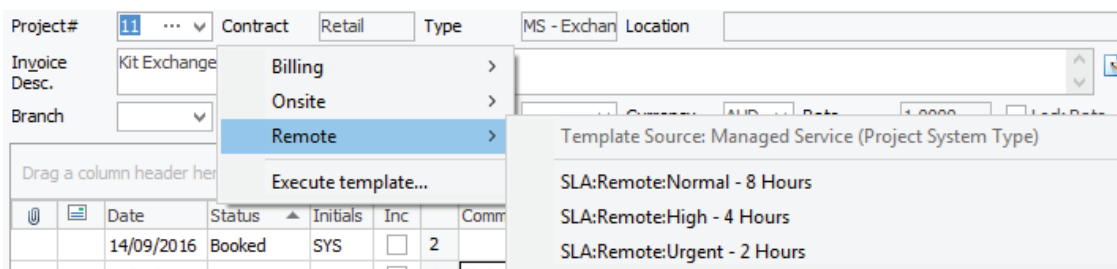
Drag a column header here to group by that column

Action	Source Type	Source	Template #	Template Name	Item	Next Bill Source	Billed	New Template Inc
Billing	Project System Type	Managed Service		<No Template Defined>		Value	Manual	1 Template
Onsite	Project System Type	Managed Service	25	SLA:Onsite: High - 4 Hours	SLA-ONSITE	Value	Manual	1 Template
Onsite	Project System Type	Managed Service	23	SLA:Onsite:Low - 7 Days	SLA-ONSITE	Value	Manual	1 Template
Onsite	Project System Type	Managed Service	26	SLA:Onsite:Low - 7 Days	SLA-ONSITE	Value	Manual	1 Template
Onsite	Project System Type	Managed Service	24	SLA:Onsite:Normal - 8 Hours	SLA-ONSITE	Value	Manual	1 Template
Remote	Project System Type	Managed Service	28	SLA:Remote:High - 4 Hours	SLA-ONSITE	Value	Manual	1 Template
Remote	Project System Type	Managed Service	27	SLA:Remote:Normal - 8 Hours	SLA-ONSITE	Value	Manual	1 Template
Remote	Project System Type	Managed Service	29	SLA:Remote:Urgent - 2 Hours	SLA-ONSITE	Value	Manual	1 Template

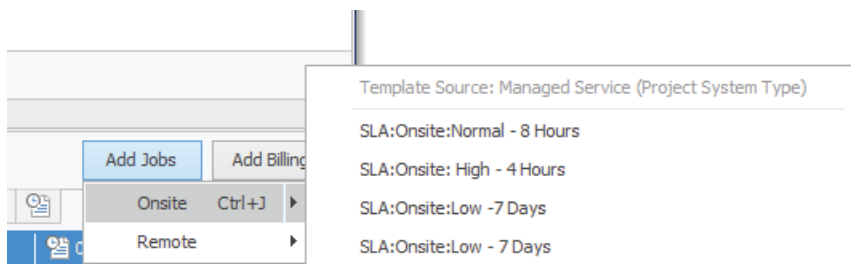
Cannot Add New Link (Link with no template de

All 'Managed Service' type contracts will now have the new SLA actions available at project list, project and job levels:

From within a related project job:

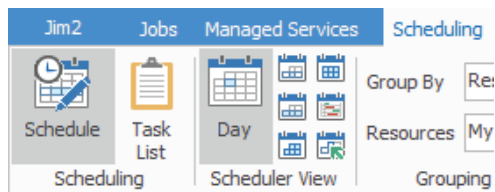


From within a project, using the 'Add Jobs' button:



Create Recurring Managed Services Jobs

Go to **Scheduling > Schedule**.



Right click anywhere in the Schedule screen and select 'New Task'. The New Schedule Task screen will appear where you will enter the following information on the task tab:

The 'New Schedule Task' dialog box has four tabs: 'Task', 'Resources', 'Scheduling', and 'Recurrence'. The 'Task' tab is active, showing fields for 'Task Type' (Managed Service Job), 'Regarding' (Project # 13), 'Template#' (Managed Services Default Template), 'Reminder' (checked, 1 hour), and checkboxes for 'Schedule', 'To-Do', 'Private', 'Recurring', and 'Create Job'. There is also an 'All day event' checkbox. The 'Subject' field contains 'Scheduled Maintenance' and the 'Description' field is empty. On the right, the 'Allocated Resources' table lists 'System administrator' and 'Frank Lampard' with 'Confirmed' and 'Completed' checkboxes. At the bottom right are 'Add Task' and 'Cancel' buttons.

Allocated Resources		
Name	Confirmed	Completed
Users		
System administrator	<input type="checkbox"/>	<input type="checkbox"/>
Frank Lampard	<input type="checkbox"/>	<input type="checkbox"/>

Complete the following:

- Select Managed Service Job from the Task Type
- Select the applicable Managed Service number
- Select an applicable Project Job Template for the recurring jobs
- Ensure 'Schedule' and 'Recurring' are ticked
- Select a Reminder period, if applicable
- Enter an applicable Subject
- Click on the Resources tab.

Move to the Resources tab to select staff.

- Double click on the intended Available Resources (the people involved in the job) and they will appear in the Allocated Resources window.
- Remove users from Allocated Resources if they are not required to do the work, by double clicking on their name.
- Click on the Recurrence tab.

The screenshot shows the 'New Schedule Task' dialog box with the 'Resources' tab selected. The 'Available Resources' list on the left includes 'Unassigned' and a group of 'Users'. 'Alan Jefferies' is selected in the 'Users' group. The 'Allocated Resources' list on the right shows 'System administrator' and 'Alan Jefferies', each with checkboxes for 'Confir...' and 'Compl...'. Navigation arrows are between the two lists.

Available Resources	
Name	
Unassigned	
Users	
Alan Jefferies	
Frank Lampard	
Fred	
Graham Tuite	
Greg Tegal	
Happen Business Pty Limited	
Harry Rednapp	
Implementers	
Joe Willard Tester	
Joel Cole	
John Arthur Jones	
Michael Carrick	
Peter Tester	
Support Team	
System administrator	

Allocated Resources	
Name	Confir... Compl...
System administrator	<input type="checkbox"/> <input type="checkbox"/>
Alan Jefferies	<input type="checkbox"/> <input type="checkbox"/>

- Enter applicable event time, recurrence pattern, range of recurrence.

The screenshot shows the 'New Schedule Task' dialog box with the 'Recurrence' tab selected. The 'Event time' section has 'Start: 12:00 AM', 'End: 12:15 AM', 'Duration: 15 minutes', and an 'All Day Event' checkbox. The 'Recurrence pattern' section has radio buttons for 'Daily', 'Weekly', 'Monthly', 'Yearly', 'Every 1 day', and 'Every weekday'. The 'Range of recurrence' section has 'Start: 24/10/2016' and radio buttons for 'No end date', 'End after: 1 occurrences', and 'End by: 24/10/2016 12:15:00 A'. The 'Allocated Resources' list on the right shows 'System administrator' with checkboxes for 'Confirmed' and 'Completed'. 'Add Task' and 'Cancel' buttons are at the bottom right.

Event time	
Start:	12:00 AM
End:	12:15 AM
Duration:	15 minutes
<input type="checkbox"/> All Day Event	

Recurrence pattern	
<input checked="" type="radio"/> Daily	<input checked="" type="radio"/> Every 1 day
<input type="radio"/> Weekly	<input type="radio"/> Every weekday
<input type="radio"/> Monthly	
<input type="radio"/> Yearly	

Range of recurrence	
Start:	24/10/2016
<input type="radio"/> No end date	
<input type="radio"/> End after: 1 occurrences	
<input checked="" type="radio"/> End by: 24/10/2016 12:15:00 A	

Allocated Resources		
Name	Confirmed	Completed
System administrator	<input type="checkbox"/>	<input type="checkbox"/>

Add Task Cancel

Once details are complete, click 'Add Task 'to schedule the new recurring managed services task.

When creating templates for scheduled recurring tasks, you must ensure the due date settings on the template is set to Period Date (Bill Date or Scheduled Date).

When the job is created, the Start Date/Time that you have set on the recurring task will become the Due Date/Time on the job.

Based on the recurrence settings, Jim2 will automatically add jobs for this Recurrence. However, before it can do so, Jim2 needs to be told when it must add the job, ie. how many days before the job is due to be conducted would you like Jim2 to add the job to the scheduler?

This is configured via **Tools > Options > Managed Services > Create Scheduled Managed Jobs XX days in advance.**

For example, you want Jim2 to create all recurring jobs 30 days from when they need to be conducted, then you can add this information in your Managed Services Options.

When jobs are created using the information configured within the Project Template, this includes (if applicable) who will be assigned the job in the Name field.

Prepaid Labour Contract Enhancements

Improvements for prepaid labour to display the number of hours left on the prepaid contract in both the project running totals and job 'Prepaid Block' screens. Un-invoiced jobs are now included when calculating prepaid labour remaining.

Prepaid ID	Prepaid Name	Prepaid Type	Billing Stock Code	Expire Stock Code	Card Code To Invoice	Current Prepaid Count	Starting Balance	Rate Ex.	Rate Inc.	Prepaid Left	Last Billed By	Hide On Invoice	Linked Prepaid ID	Prepaid Blocks	Next Expire Date	Expires Frequency	
1	Prepaid Labour	Prepaid Labour	PREPAID.LABOUR		ADV.KNOW	0	0	100.0000	110.0000	60		<input type="checkbox"/>		1	60.00	28/08/2016	Monthly
2	Prepaid Block	Prepaid Labour Block	PREPAID.BLOCK	PREPAID.EXPIRY	ADV.KNOW	60	0	100.0000	110.0000			<input type="checkbox"/>					

Name	Remaining Units	Prepaid Units Consumed	Quantity To Be Billed	Rate Inc.	Total Inc.
Prepaid Block	60		60	110.0000	0.0000
Grand Total					6600.0000

We have fixed bugs in calculating macros for prepaid labour.

You can now display Pages Remaining as prepaid labour block counter, and display Paid To in another column.

Un-invoiced jobs are included when calculating prepaid labour remaining.

Managed Print Services Edition Enhancements

Customisable CSV MPS Connector improvements

The CSV MPS Connector no longer requires specific hardcoded CSV format. You now have the ability to configure the Connector, specifying how the Connector finds particular columns required in the file. The location of columns can be specified either by index or by heading, and allows Jim2 to conform to your data, instead of the other way around.

Customisable XLS/XLSX MPS Connector improvements

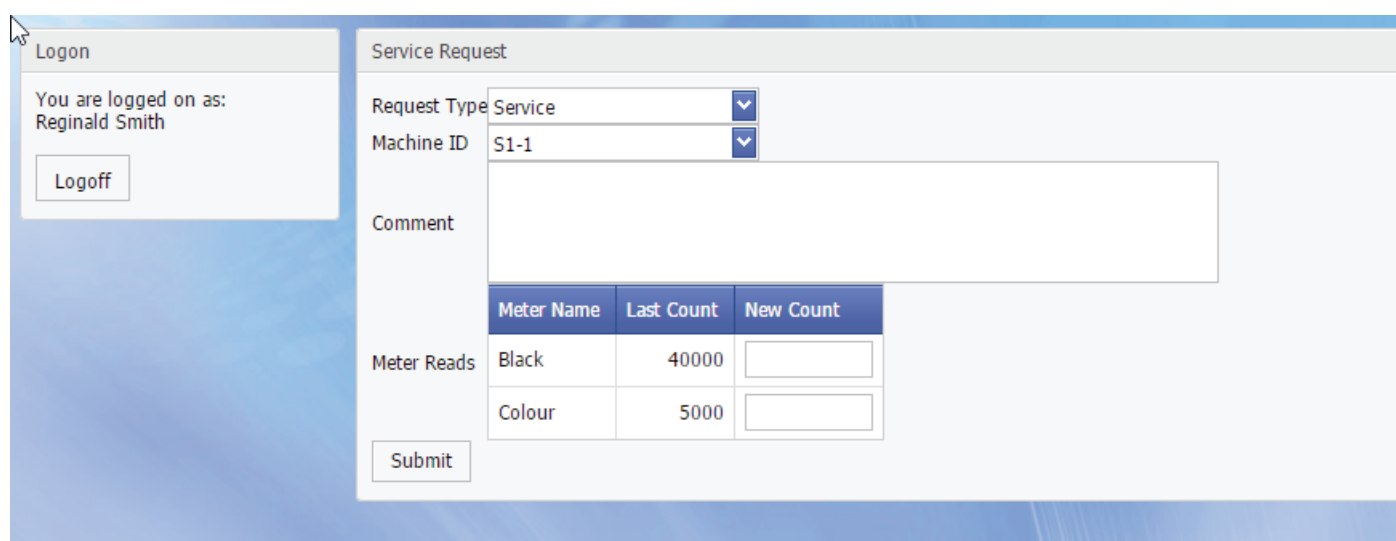
The XLS/XLSX MPS Connector no longer requires specific hardcoded XLS/XLSX format. You now have the ability to configure the Connector, specifying how the Connector finds particular columns required in the file. The location of columns can be specified either by index or by heading, and allows Jim2 to conform to your data, instead of the other way around.

Non-Billing Project Template capability

The ability to create project templates for non-billing templates is also available to MPS clients. All setup and non billing template creation examples can be used by MPS clients. There have been no changes to the billing aspects of Jim2 in this release for MPS clients.

Service requests supports service meter reads

Jef can be configured to allow/require service meters when submitting a service request.



The screenshot shows the 'Service Request' form. On the left is a 'Lagon' sidebar with the text 'You are logged on as: Reginald Smith' and a 'Logoff' button. The main form area is titled 'Service Request' and contains the following fields:

- Request Type:** A dropdown menu with 'Service' selected.
- Machine ID:** A dropdown menu with 'S1-1' selected.
- Comment:** A large text area.
- Meter Reads:** A table with three columns: 'Meter Name', 'Last Count', and 'New Count'.

Meter Name	Last Count	New Count
Black	40000	<input type="text"/>
Colour	5000	<input type="text"/>

Below the table is a 'Submit' button.

Net Overs and Net Clawback fields now available on invoice

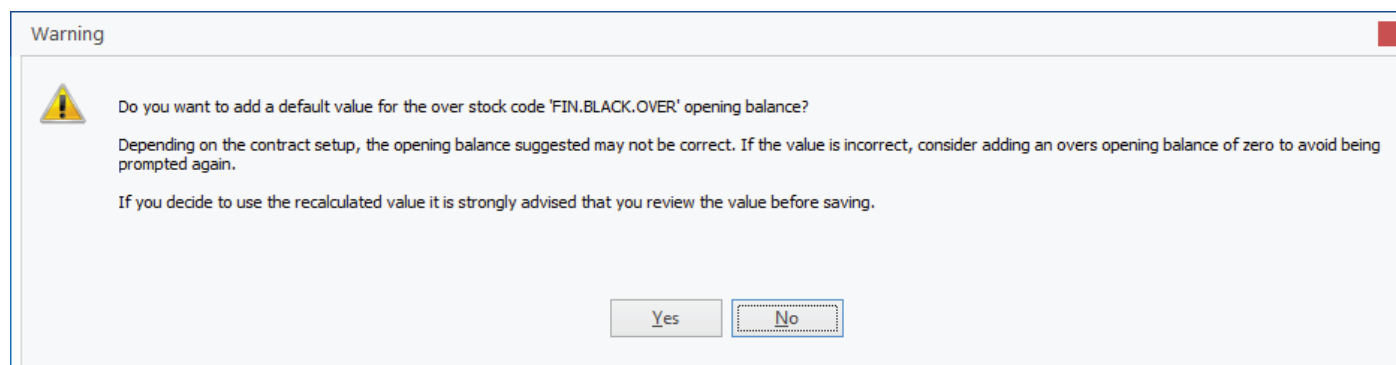
The master invoice summary may calculate that there were 2,000 over pages and 750 of these were clawed back. This would display two lines on the invoice summary.

If the rates for standard and over pages are the same, then this has exactly the effect as just having only 1,250 over pages, which simplifies the invoice appearance.

It is even more important when they cancel each other out. If you have 600 overs and 600 pages clawed back, this can be unnecessarily confusing on an invoice. In this case the new NetOvers and NetClawback fields would both be empty, requiring no other line than the Min Volume line.

New warning adding overs opening balance

There is now an additional warning that the suggested value may be incorrect:



The screenshot shows a 'Warning' dialog box with a yellow warning icon. The text inside reads:

Do you want to add a default value for the over stock code 'FIN.BLACK.OVER' opening balance?

Depending on the contract setup, the opening balance suggested may not be correct. If the value is incorrect, consider adding an overs opening balance of zero to avoid being prompted again.

If you decide to use the recalculated value it is strongly advised that you review the value before saving.

At the bottom are two buttons: 'Yes' and 'No'.

Meter Read Tab Improvements

Field	Explanation
Meter Read	The actual meter read for that period. This is the same as Standard Read + Over Read.
Effective Meter Read	Adds in additional virtual pages. This is the same as Standard Read + Over Read + Estimate Unders Read + Unders Read.
Standard Read	The number of pages billed against the machine for all time, using the Standard stock code. This includes Standard Stock Code Opening Balance plus all stock on jobs (or purchase orders for PO stock), minus all stock returned on RFCs (or RTVs for PO stock).
Estimate Unders Read	The number of pages billed against the machine for all time using Unders stock code with attributes of Estimate Standard or Estimate Over. It is calculated in a similar manner as Standard Read, but uses the unders stock.
Under Read	The number of pages billed against the machine for all time using Unders stock code with the attribute of Unders. It is calculated in a similar manner as Standard Read, but uses the unders stock.
Over Read	The number of pages billed against the machine for all time using Overs stock code. It is calculated in a similar manner as Standard Read, but uses the overs stock.
Actual Qty	The number of actual pages for this period. This is the same as Standard Qty + Over Qty.
Standard Qty	The net number of pages billed for this period using the Standard stock code.
Estimate Under Qty	The net number of pages billed for this period using the Unders stock code with the attribute of Estimate Standard or Estimate Over.
Under Qty	The net number of pages billed for this period using the Unders stock code with the attribute of Unders.
Over Qty	The net number of pages billed for this period using the Overs stock code.
Minimum Volume	If there is a value for either Under Qty or Over Qty, then this is Standard Qty + Under Qty.

QR barcode

You can set a barcode on a project (button is the serial# field). This allows for the printing of a QRCode URL that directs the customer to a page to submit service required or no login required.

Improved Meter Reads

Improved meter reads tab to keep a running total of various meters (standard, unders, overs, etc.)

Reports

Machine List – Action Templates

Report

Machine List - Action Templates ▼

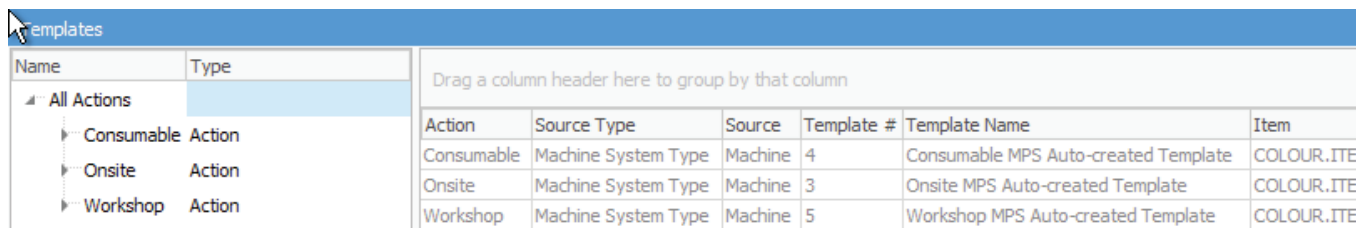
Machine – Action Templates

Report

Machine Action Templates ▼

Create Machine Job Templates

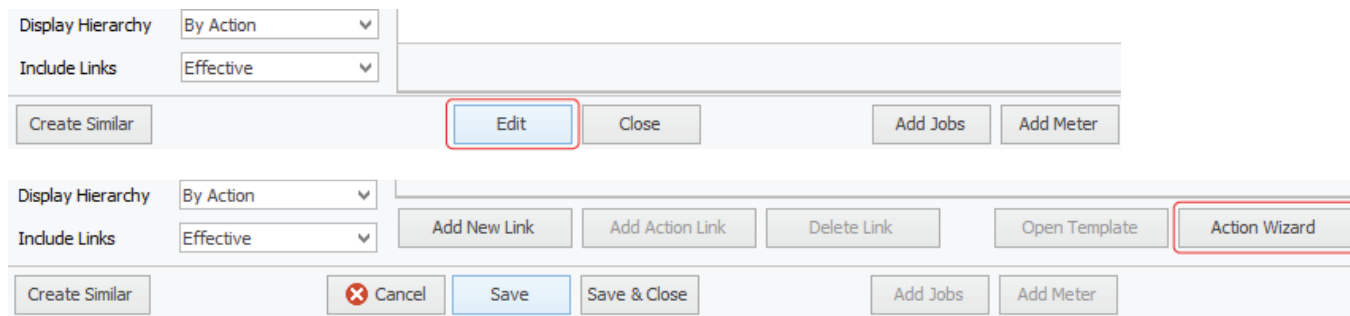
1. Create your new contract as you would have previously, entering your starting balances, if applicable, and save the contract.
2. Select the Templates tab, and you will see three default templates have been assigned for use in the creation of Consumable, Onsite and Workshop jobs. In each case you have the option to leave the template associated to the Action as is, or change the association to a new template. In this example, we will change the Consumable template to use a newly created Shared template that is used where a default freight charge is to be applied.



The screenshot shows the 'Templates' tab with a left-hand navigation pane and a main table area. The navigation pane lists 'All Actions' with sub-items 'Consumable', 'Onsite', and 'Workshop', each followed by the word 'Action'. The main table area has a header 'Drag a column header here to group by that column' and a table with the following data:

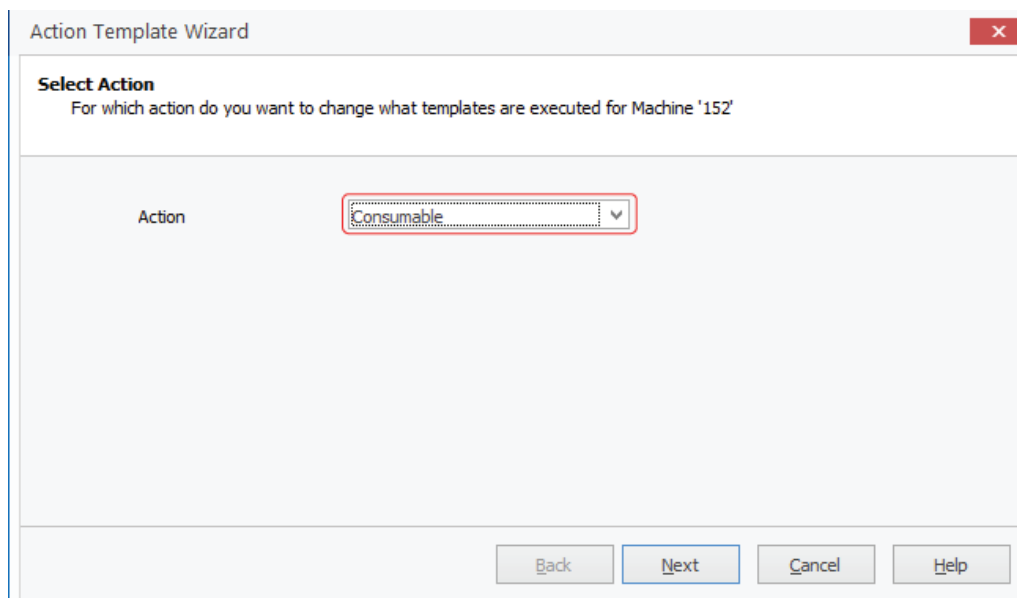
Action	Source Type	Source	Template #	Template Name	Item
Consumable	Machine System Type	Machine	4	Consumable MPS Auto-created Template	COLOUR.ITE
Onsite	Machine System Type	Machine	3	Onsite MPS Auto-created Template	COLOUR.ITE
Workshop	Machine System Type	Machine	5	Workshop MPS Auto-created Template	COLOUR.ITE

3. Select 'Edit', and then 'Action Wizard'.



The first screenshot shows the 'Edit' button highlighted with a red box. The second screenshot shows the 'Action Wizard' button highlighted with a red box. Both screenshots show a 'Display Hierarchy' dropdown set to 'By Action' and an 'Include Links' dropdown set to 'Effective'. The first screenshot also shows 'Create Similar', 'Close', 'Add Jobs', and 'Add Meter' buttons. The second screenshot shows 'Add New Link', 'Add Action Link', 'Delete Link', 'Open Template', 'Cancel', 'Save', 'Save & Close', 'Add Jobs', and 'Add Meter' buttons.

4. The 'Select Action' window is displayed. Select the Consumable action and then click 'Next'.



The screenshot shows the 'Action Template Wizard' window. The title bar says 'Action Template Wizard' with a close button. The main area has a section titled 'Select Action' with the text 'For which action do you want to change what templates are executed for Machine '152''. Below this is a dropdown menu labeled 'Action' with 'Consumable' selected. At the bottom are buttons for 'Back', 'Next', 'Cancel', and 'Help'.

5. The 'Current Action Template Setup' window is displayed showing you the existing Consumable template. Select 'Next' to continue

The screenshot shows the 'Current Action Template Setup' window. The title bar is 'Action Template Wizard' with a close button. The main heading is 'Current Action Template Setup' with a subtitle 'This describes the current set of templates that will be executed for the action Consumable, for Machine "152"'. Below this, a text block states: 'The Machine "152" inherits a single template link from Machine System Type "Machine.Old" for the action "Consumable"'. A table is displayed with two columns: 'Template #' and 'Template Name'. The first row contains the values '4' and 'Consumable MPS Auto-created Template'. At the bottom, there are four buttons: 'Back', 'Next' (highlighted with a blue border), 'Cancel', and 'Help'.

Template #	Template Name
4	Consumable MPS Auto-created Template

6. The 'Change the Action Template Setup' window is displayed. Select the appropriate option, which in this case is to 'Change so that a different template is used in place of the existing template', then click 'Next' to continue.

The screenshot shows the 'Change the Action Template Setup' window. The title bar is 'Action Template Wizard' with a close button. The main heading is 'Change the Action Template Setup' with a subtitle 'Specify the way you would like to change the templates executed for the action Consumable, for Machine "152"'. Below this, there are three radio button options: 'Change so that no templates are executed for this action', 'Change so that a new template is used in addition to existing templates', and 'Change so that a different template is used in place of the existing template:' (which is selected and highlighted with a blue border). At the bottom, there are four buttons: 'Back', 'Next' (highlighted with a blue border), 'Cancel', and 'Help'.

7. The 'Specify template to use for change' window is displayed. Select to 'use an Existing template', then click on the 'Select Template' button.

Action Template Wizard [X]

Specify template to use for change
You can either use an existing template or specify a new template to use for the change

☐ Create a new template
☒ Use an existing template

Select Template

8. The 'Select Machine Template' window is now displayed where you can select the 'Consumable MPS – Default Freight Charge Template'. Select this, then click 'OK'.

Select Machine Template [X]

Template Search | Action Template Search

Cust# [] ... Template Name [] ☒ Enabled?
 Machine# [] ... Item# [] ... ☐ Shared?
 Action [] v Stock# [] ...
 Project System Type [] v Project Type [] v

Template Constraint
 Action [Consumable] v Level [Machine] v Machine [<UNKNOWN>]

Drag a column header here to group by that column

Template #	Template Name	Action Constraint	Object Type Constraint	Object Constraint #	Card Code	Item#	Shared?	Enabled ?
1	Default Template						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Consumable MPS Auto-created Template	Consumable					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1504	Consumable MPS - Default Freight Charge	Consumable					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

9. The 'Specify template to use for change' window will display to confirm your choice. Select 'Next' to continue.

Action Template Wizard [X]

Specify template to use for change
You can either use an existing template or specify a new template to use for the change

☐ Create a new template
☒ Use an existing template

Template # 1504

Template Name Consumable MPS - Default Freight Charge

[Select Template]

[Back] [Next] [Cancel] [Help]

10. The 'Default Template "Includes" when link is overridden with a new template. If this link is overridden in the future with a new template, you can specify a default list of templates that the new template can include. This can allow you to set appropriate header defaults, and add a default list of stock to the new template.

Action Template Wizard [X]

Default Template "Includes" when link is overridden with a new template
If this link is overridden in the future with a new template, you can specify a default list of templates that the new template can include. This can allow you to set appropriate header defaults and add a default list of stock to the new template.

#	Template Name	Stock Lines
▶ 37	New Client Setup	... None

[Back] [Next] [Cancel] [Help]

11. The 'When should the template be executed' window is displayed. Select the first option, which is used for manually executed templates, then click 'Next' to continue.

Action Template Wizard [X]

When should this template be executed?
Please specify when this template should be executed

☒ This template is not executed on a schedule and is manually invoked
☐ The schedule for this template's execution is controlled by the project's next bill cycle
☐ This template is executed on a custom schedule

[Back] [Next] [Cancel] [Help]

12. The 'Summary of Changes' windows is displayed, which confirms the changes that are about to be made. Select 'Finish'.

Action Template Wizard

Summary of Changes

Please review the proposed changes before finishing the wizard.

The existing template inherited from Machine System Type 'Machine.Old' will be overridden by a single link that specifies the following template:-

Existing Template:-
Template#: 4
Template Name: Consumable MPS Auto-created Template
Schedule: Manually executed
Override?: Normal inheritance

New Template:-
Template#: 1504
Template Name: Consumable MPS - Default Freight Charge
Schedule: Manually executed
Override?: Normal inheritance

Back

Finish

Cancel

Help

13. **IMPORTANT** – Select 'Save' on the contract to complete the changes.

Display HierarchyBy Action

Include LinksEffective

Add New Link

Override Action Link

Delete Link

Open Template

Action Wizard

Create Similar

Cancel

Save

Save & Close

Add Jobs

Add Meter

You will now see the new Consumable template has been associated to this contract and the task is complete.

Templates							
Name	Type	Drag a column header here to group by that column					
All Actions		Action	Source Type	Source	Template #	Template Name	Item
Consumable	Action	Consumable	Machine	5304	1504	Consumable MPS - Default Freight Charge	Item on Machine
Onsite	Action	Onsite	Machine System Type	Machine.Old	3	Onsite MPS Auto-created Template	Value
Workshop	Action	Workshop	Machine System Type	Machine.Old	5	Workshop MPS Auto-created Template	Value

Merge Templates

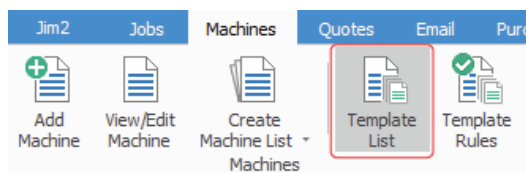
While the billing side of the MPS Edition has not changed, the new template concepts can be applied to MPS Edition for non-billing templates.

New installations will have some standard templates created that are used by default during the creation of Onsite, Workshop, Service and Consumable jobs.

For those upgrading, machine specific templates will be created where stock associated to Consumable, Onsite and Workshop jobs are found in the Default Stock tab.

The following outlines how these templates can be 'merged' to better utilise Jim2 template inheritance.

Go to **Projects (Machines) > Template List**.



*If no templates are displayed then you have no project specific templates and the 'Merge' function is not applicable.

Machine Template List

Template# Template Name Machine System Type ☒ E

Item Job Type Machine Type ☒ S

Template Restrictions ☒ L

Action ☐ Exclude Compatible Level ☐ E

Drag a column header here to group by that column

Template#	Template Name	Action Constrai	Object Type Co	Object Constrai	Item#	Card Code#	Job Type	Enabled	Shared
1	Default Template				Leave value	Card # on	Leave value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Managed Services Default	Billing	Machine	Managed	Item on	Card # on		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Billing:Contract:95	Billing	Machine	95	Item on	Card # on		<input checked="" type="checkbox"/>	<input type="checkbox"/>

You will now see all the templates that have been created. You can see by the name of the template the type of template, and to which machine it relates. Open one or more of the templates, and you will see the details within, including the stock that is applied when the template is used. At the bottom of the template you will see three tabs.

Stock Machines 1 References 0

Stock – displays the stock grid for this template.

Machines – displays a list of machine contracts that currently use this template. At this point it will have a value in the tab of '1' as it is a machine-specific template.

References – displays a list of templates where this template is referenced as an 'Included Template'. This will be '0' with no other templates referencing this template within the system.

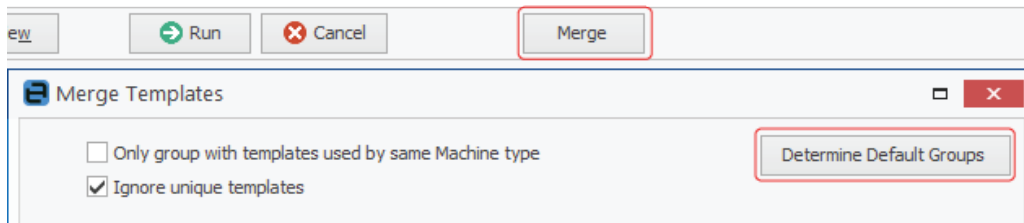
As an example of why we use the 'Merge' function, you may have added a freight charge to every machine contract in the Default Stock tab for use with Consumable jobs creation.

Now that the upgrade has been performed, you may have a Consumable template for each contract with the applicable freight stock line, quantity and price that is identical.

By using the 'Merge' function, we will remove all specific templates, and have the machine contracts all use one single shared template.

This means that, should you need to update the stock for all the contracts, the change can be made in one place and will immediately update all the contracts that use the new shared template.

At the bottom of the list of templates you will see the 'Merge' button. When selected, you will be presented with the template Merge screen.



Select the 'Determine Default Groups' button.

Jim2 will now analyse all the templates in the previous list, and identify groups of templates that can be merged to use a shared template. Depending on the nature of your existing contracts, the result may be one or more suggested shared templates recommended for creation.

Once the analysis has finished, you will see all your templates listed and grouped based on the merge recommendation with the Proposed Template Name that will be used when the merge is performed.

At this point you may choose to remove some templates from the merge process by highlighting the merge line and selecting the 'Delete Merge' button. Those templates will be removed from the merge grid, and will no longer be included in the merge process.

When you are ready to continue, select the 'Merge/Delete Templates'

Jim2 will now work through all the templates in the list.

First, the new template will be created, then all applicable machine contracts are updated to point to the new shared contract, and finally the old templates are deleted from the system.

You can confirm this by opening each machine contact's Template tab, where you will see the new shared template is being used for the Consumable action.

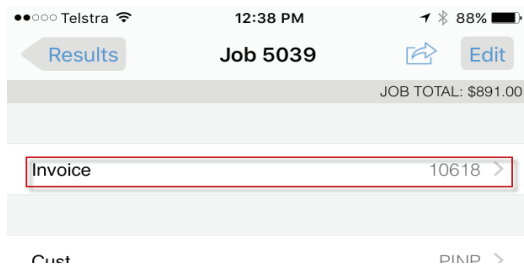
You can now open the template, and rename the template to something more meaningful to you and the users.

If you select the Machine tab when viewing the contract, you will also see all the machine contracts that are now using this template for Consumable job creation.

Invoice element on job – quickly access invoice reports from job screen

When viewing a job that has been invoiced, you will now see the invoice number displayed at the top of the job view. Selecting the invoice number will prompt you to view the invoice using its original form, or prompt you to select an alternative form.

Once displayed, the invoice can also be emailed, Air-dropped or printed.

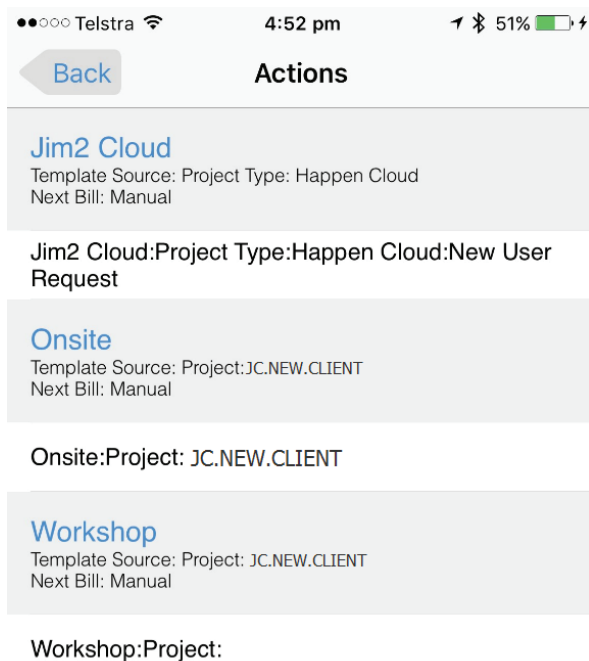


Ability to edit multicurrency on jobs and quotes

New options (for stock list and lookup) Default Currency and Display Price Level

Project Job Creation

Jobs can now be created from within projects that use the use project templates.



Labour Timers

Now have the ability to add labour via timers to manufacturing jobs.

Jim2 Server

Jim2 Server Backup

The Jim2 Server Configuration Manager screen now has three additional backup options:

1. **Frequency** – You now have the option to run a Daily, Daily with Hourly Incremental Log, or Weekly backup.
2. **Log Restore to Follow** - The hourly incremental backups are restored using the new 'Restore' option available via the Restore tab.
3. **Azure** – In addition to FTP, the new Azure upload option has been added.

Jim2 Server Console

File Help

Options Backup Scheduled Backup Restore Import Email DB Maint. Sessions Locks Next Object # Licence

☐ Do Scheduled Backups

Server Backup Location:

Databases to backup:

☐ 4Demo
☐ AAB
☐ Blank
☐ Demo
☐ Diami
☐ HFDemo

Frequency

☒ Daily Time: 12:00:00 AM
☐ Daily with Hourly Log
☐ Weekly

☐ Compress
☐ Add Date at end of the file name

Password:

Do Backup Now

Azure FTP

☐ Upload backups to Azure blob storage

Storage Account Name Blob Container Name

Storage Access Key

Refresh Apply Re-Connect Exit

Clients: 0 of 5, Web/Mobile: 0 of 1 Server: NUC-STU 5750

For detailed understanding and setup please refer to: http://jim2help.happen.biz/jim2_technical_knowledge_base_jim2_server_console_backup.html

New Backup Options

Backup Daily with hourly incremental

Jim2 Server Scheduled Backup now includes a daily backup with hourly incremental SQL Log backup. This is the ideal option for clients who need to minimise data loss during critical hardware failure.

Configure the Backup

Jim2 Server Console

File Help

Options Backup Scheduled Backup Restore Import Email DB Maint. Sessions Locks Next Object # Licence

☐ Do Scheduled Backups

Server Backup Location:

Databases to backup:

☐ 4Demo

Frequency

☒ Daily Time: 12:00:00 AM
☐ Daily with Hourly Log
☐ Weekly

☐ Compress
☐ Add Date at end of the file name

Password:

Do Backup Now

Once selected, Jim2 Server will perform a full backup at the time specified, and then hourly log backups will be performed every hour until the time to perform another full backup is reached.

Restoring a Backup

The restoring of an incremental backup chain requires all incremental files to be available up until the time of the backup you wish to restore.

The process of restoration is as follows.

Step 1. Restore the full backup with the 'Log Restore To Follow' option ticked

Jim2 Server Console

File Help

Options Backup Scheduled Backup **Restore** Import Email DB Maint. Sessions Locks Next Object # Licence

Database: Jim_ Password:

From:

☐ Restore over existing database ☒ Log Restore To Follow

Restore locations - NOTE: These directories are directories on the server

Accounts data file:

Accounts log file:

Documents data file:

Documents log file:

Refresh Restore Re-Connect Exit

Clients: 0 of 5, Web/Mobile: 0 of 1 Server: NUC-STU 5750

If you are restoring over an existing database, you will also need to tick 'Restore over existing database' and ensure that the applicable Jes instance has been stopped prior to proceeding.

By selecting 'Log Restore To Follow' a special SQL restore is performed that informs SQL Server that additional incremental log backups are also to be performed.

Select 'Restore', and the initial full database restore will be performed.

Step 2. Restoring the incremental log backups

You will cycle through the process of restoring each of the incremental backups in the order in which they were taken. Should you attempt to restore a log backup in the incorrect order, you will receive an error message and the restore will be aborted.

Note: the backup filenames will have _logXXXX appended where XXXX represents the time of the processed hourly backups.

Continue the process of restoration with the 'Log Restore To Follow' option ticked until you have restored the second-last of the incremental chain.

Jim2 Server Console

File Help

Options Backup Scheduled Backup **Restore** Import Email DB Maint. Sessions Locks Next Object # Licence

Database: Jim_HFDemo Password:

From: \\NAS-SERVER\\Public\\HFDemo_20160803_log1800.zip

☐ Restore over existing database ☒ Log Restore To Follow

Restore locations - NOTE: These directories are directories on the server

Accounts data file:

Accounts log file:

Documents data file:

Documents log file:

Refresh Restore Re-Connect Exit

Clients: 0 of 5, Web/Mobile: 0 of 1 Server: NUC-STU 5750

Step 3. Restoring the last of the incremental backups and finalising the restore

For the final restore, you will untick 'Log Restore To Follow', signalling to SQL Server that this is the last incremental in the chain you wish to restore. Continue with the final restore, and the process is then complete.

Jim2 Server Console

File Help

Options Backup Scheduled Backup **Restore** Import Email DB Maint. Sessions Locks Next Object # Licence

Database: Jim_HFDemo Password:

From: \\NAS-SERVER\\Public\\HFDemo_20160803_log2200.zip

☐ Restore over existing database ☐ Log Restore To Follow

Restore locations - NOTE: These directories are directories on the server

Accounts data file:

Accounts log file:

Documents data file:

Documents log file:

Refresh Restore Re-Connect Exit

Clients: 0 of 5, Web/Mobile: 0 of 1 Server: NUC-STU 5750

Weekly Backup

Where clients are running daily server image backups, we have introduced the option of weekly only scheduled backups. We stress that this option is only recommended for clients performing a reliable alternative daily VSS aware backup of the Jim2 databases.

Jim2 Server Console

File Help

Options Backup Scheduled Backup Restore Import Email DB Maint. Sessions Locks Next Object # Licence

☒ Do Scheduled Backups

Server Backup Location: \\192.168.1.10\Public

Databases to backup:

☒ purplec

Frequency

☐ Daily Time: 1:30:00 PM

☐ Daily with Hourly Log

☒ Weekly Sunday

☒ Compress

☒ Add Date at end of the file name

Password:

Do Backup Now

Azure FTP

☐ Upload backups to Azure blob storage

Select the 'Weekly' option with the appropriate time to run above.

Upload Azure option

Adding to the existing ability to FTP an offsite copy of the database, you can now configure the successfully completed backup to be uploaded to Microsoft Azure blob storage.

Azure FTP

☒ Upload backups to Azure blob storage

Storage Account Name Jim2Backups Blob Container Name Daily Backups

Storage Access Key Jim2#@happenx2@

Once you have created your Azure account and storage container, enter the details in the location provided and select apply.

Override working directory

Configurable Jim2 Server temporary working (backup) directory. Launch Jim2 Configuration Manager, right click on the Jim2 Server and select Configure. Enter the directory you wish to use as per below.

Configure Jim2Server

TCP/IP Port 5750

SQL Server

Instance User Id sa Password ***** Test

☐ Jim2Server Console Must Authenticate

Working Directory

Leave this blank to use the default directory. By default Jim2Server uses a directory it creates under the system's CommonApplicationData directory (usually something like C:\ProgramData\Happen Business\Jim2Server)

The working directory must accessible by the SQL Server process and the Jim2Server process. Make sure the security permissions on the selected folder are suitable.

D:\JimSqlTemp\

OK Cancel

Options

There have been additions to a number of the Options screens.

Show warning if Jes is not running on startup.

The screenshot shows the 'Options' window with the 'General' tab selected. The left sidebar lists various categories: Company, Security, General, Branches, Labour, Job, Invoice, Stock, Customer Returns, Project, Machines, Managed Services, Quote, Purchase, CardFile, Item, and Stock. The 'General' tab contains several settings: Home Currency (AUD), Continuously adding in (Job, CardFile, Item, Stock), Database Colour (Skin Name and Accent Color for Main and Training), Timers (Remind if in Edit mode more than 5 min, Auto Logout when inactive for 0 min), Report date format, and a checkbox 'Show warning if Jes is not running on startup' which is checked and highlighted with a red box.

You can opt to view other account managers' CardFiles either by the account manager on the job, quote etc., or by the account manager of the customer on the job, quote etc.

The screenshot shows the 'Options' window with the 'CardFile' tab selected. The left sidebar is the same as the previous screenshot. The 'CardFile' tab contains several settings: Card File Defaults (Price Level 4, Terms COD, Statement Via Print, Send Invoice Via Print), Quick Add defaults (Company, Individual), Statement memo (Standard messages that will appear on your statements can be used to advertise upcoming events, or simply to remind Debtors of your trading terms. For example: For electronic remittance, please use the following details: BSB: 001 001, Account Number: 12345678), and Account Manager Security on Objects (Jobs, Quotes & Projects) which is highlighted with a red box. This section has two radio buttons: 'By Account Manager on Object' (selected) and 'By Account Manager of Customer on Object'.

New options for checking for duplicate Cust Ref#.

Options

- Company
 - Security
- General
 - Branches
 - Labour
- Job
 - Invoice
 - StockGrid
 - Customer Returns
- Project
 - Machines
 - Managed Services
- Quote
- Purchase
- CardFile
- Item
- Stock
 - Stock Pricing
 - Serial/Attributes
 - Warehouse Management
- Accounts
 - Linked Accounts
 - Multicurrency
- Banking
- Schedule
- eBusiness
- Documents
- Other
 - Printers
 - Email
 - Retail & EFTPOS

Job

I call Job

Global for all stations ☒

☐ Service Job ☒ Sales Job

Cust#

Item#

Cust Ref#

Show Prepayments on Jobs ☒

Default Due Date

Days Hours

Calc Tax Total from

Account Fee Tax

Tax on Freight

Tax 'Free' code

Default Job Total calc by

Charge freight at Job Level ☐

Show Our Ref# ☒

Show Status Due ☒

Show Customer account balance ☒

Show Quote# instead of Ex.Job# ☒

Check for duplicate Cust Ref#

☒ - Station level ☐ - Global level

Fault/Inv desc button will

Set Account Manager from Ship card ☐

Include Labour in cost when Manufacturing ☐

Show Profit Percent as

Job List

Display Item details in Job List ☒

Display Card Name in Job List ☒

Display Ship Name in Job List ☒

OK

Cancel

Default invoice reports and fast invoicing selections can now be set by Job Type.

Options

Job - Invoice

Default Invoice reports Global for all stations ☒

Default Invoice report for Service Job

Default Invoice report for Sales Job

Default Invoice reports for Projects Global for all stations ☐

Job Type	Report Name
Billable	InvoiceServiceSale
New Business	InvoiceSale

Other Invoice defaults

Default Ship Via

Invoice memo
This Invoice has been produced using the Jim2 Business Engine.

☐ Fast Invoicing

☒ Print Invoice after invoicing a job

☒ Allow quick payment on Invoice

☒ Auto send batch Invoicing emails

Calculate Account Fee on
☒ Stock Total ☐ Sub Total

☐ Check if customer is outside trading terms

Use BPAY ☒

Biller Code

☒ - Station level ☐ - Global level

OK Cancel

The default behaviour for the Stock in Advance dialog is controlled via **Tools > Options > Job > Stock**. This can also be overridden at a stock level, allowing for example, a specific stock is 'not' to be back ordered.

The screenshot shows the 'Options' dialog box with the 'Job - Stock' tab selected. The 'Auto update available Qty when Stock added to grid' checkbox is highlighted with a red box.

To override, edit a stock, click on the Details tab, and select the behaviour from the drop-down.

The screenshot shows the 'Editing Stock AC.VAL.134A.SL' dialog box with the 'Details' tab selected. The 'Stock in Advance' dropdown menu is open, showing options: '{ Default Use Options}', '{ Default Use Options}', 'Supply only available (backorder the rest)', 'Supply only available (no backorder)', and 'Backorder all'.

You now have the ability to bill or not bill projects manually from a list, or have a prompt that will ask the user each time.

The screenshot shows the 'Options' dialog box with the 'Project' tab selected. The 'Bill Manual From List' dropdown menu is open, showing options: 'Ask User', 'Ask User', 'Yes', and 'No'.

If 'Check Visibility on Meter Setup' is ticked, the overall rule says that if it is billable to the client at a non-zero rate, the charge should be visible – otherwise it should be hidden. This means:

- Non-billable meter stock codes are normally hidden
- Meter stock codes billed at \$0 are normally hidden.
- Standard and over charges on master contracts are normally hidden as these are tracking-only meters billed at \$0.

Options

Company

Security

General

Branches

Labour

Job

Invoice

StockGrid

Customer Returns

Project

Machines

Managed Services

Quote

Purchase

CardFile

Item

Stock

Stock Pricing

Serial/Attributes

Warehouse Management

Accounts

Linked Accounts

Multicurrency

Banking

Schedule

eBusiness

Documents

Other

Printers

Email

Retail & EFTPOS

Project - Machines

Machines

Default Billing Meter Job Type

Copier Billing

Default Service Meter Job Type

Copier Meter

Default Consumable Job Type

Copier Consume

Default Service Job Type

Copier Service

Default Service - Workshop Job Type

Onsite

Linked Meter Kit Stockcode

Linked Meter Kit Master Stockcode

No Meter Read Stock Code

Bill Estimate Stock Code

Leave Unders Available for Clawback

Auto hide Meters when Min Charge

Auto hide Free Count

Auto hide Rate Inc. on Meter Setups

Invoice \$0 Min Charge Stock

Invoice \$0 Base Charge Stock

Check Visibility on Meter Setup

Meter Read entry period (days)

31

Warn if outside Meter Read entry period

Warn if Meter Read is outside average(%)

15

Exclude Meter Reads Older than (days)

15

Group PO By Project Method

Consolidated

Page Request

Page Count URL

http://www.yoururl.com?MeterReads.aspx

Auto BCC Page Requests

Default Billing Job Description

Fault Desc.

Invoice: {{Project.Job.Bill.Date.Month}} {{Project.Job.Previous Job.Bill Date.Month}} {{Project.Job.Next Job.Bill Date.Month}} {{Project.Job.Date In}} {{Project.Job.Next Job.Bill Date}} {{Project.Job.Previous Job.Bill Date}}

Invoice Desc.

Invoice: {{Project.Job.Bill.Date.Month}} {{Project.Job.Previous Job.Bill Date.Month}} {{Project.Job.Next Job.Bill Date.Month}} {{Project.Job.Date In}} {{Project.Job.Next Job.Bill Date}} {{Project.Job.Previous Job.Bill Date}}

- Station level

- Global level

OK

Cancel

Options

- Company
 - Security
- General
 - Branches
 - Labour
- Job
 - Invoice
 - Stock
 - Customer Returns
- Project
 - Machines
 - Managed Services
- Quote
- Purchase
- CardFile
- Item
- Stock
 - Stock Pricing
 - Serial/Attributes
 - Warehouse Management
- Accounts
 - Linked Accounts
 - Multicurrency
- Banking
- Schedule
- eBusiness
- Documents
- Other
 - Printers
 - Email
 - Retail & EFTPOS

Other - Email

Email Receive

☒ Enable Receive Email

Poll every minutes (leave blank for default of 5 minutes)

Email Send

☒ Enable Send Email

Max. emails per minute

Default SMTP server Port (leave Port blank for default)

User

Password

SSL

None

Test SMTP Connectivity

Warning: Many mail servers will overwrite the from email address when using authenticated access. Check with your mail system administrator before configuring a user id and password for relaying email from Jim2.

Email Fonts

HTML Font

--- HTML Email sample font ---

Plain Text Font

--- Plain Text Email sample font ---

- Station level

- Global level

OK

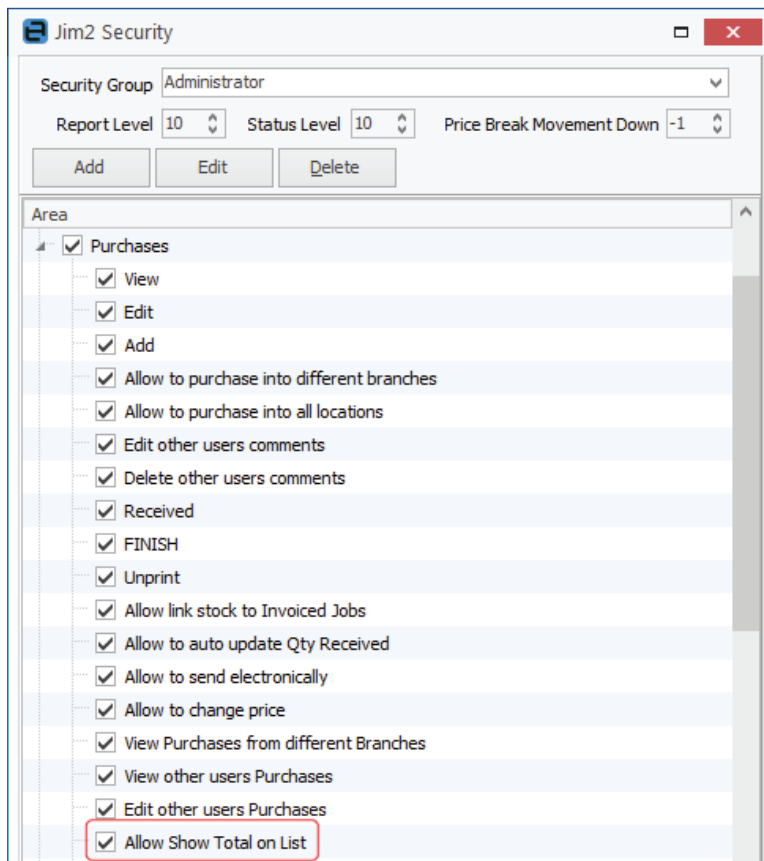
Cancel

Security

There are now two extra areas within the Jim2 Security screen. Other areas have been updated.

- Lists
- Templates

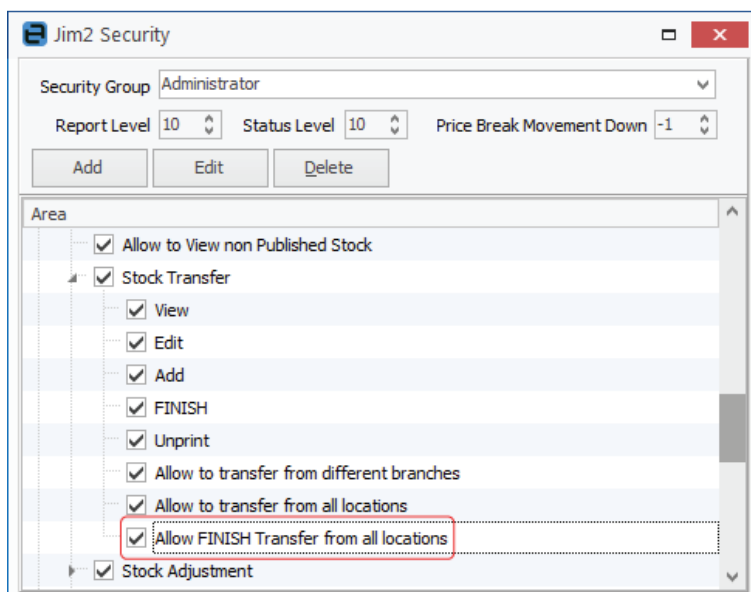
You can now add a security setting on the 'Show Total' button on a job, purchase or quote list.



The screenshot shows the 'Jim2 Security' window with the 'Security Group' set to 'Administrator'. The 'Report Level' is 10, 'Status Level' is 10, and 'Price Break Movement Down' is -1. The 'Area' dropdown is set to 'Purchases'. The following permissions are checked:

- ☒ View
- ☒ Edit
- ☒ Add
- ☒ Allow to purchase into different branches
- ☒ Allow to purchase into all locations
- ☒ Edit other users comments
- ☒ Delete other users comments
- ☒ Received
- ☒ FINISH
- ☒ Unprint
- ☒ Allow link stock to Invoiced Jobs
- ☒ Allow to auto update Qty Received
- ☒ Allow to send electronically
- ☒ Allow to change price
- ☒ View Purchases from different Branches
- ☒ View other users Purchases
- ☒ Edit other users Purchases
- ☒ Allow Show Total on List

There is a new security flag so that Finishing a stock transfer can be limited to the user's default stock location only, or allow to finish from all locations.



The screenshot shows the 'Jim2 Security' window with the 'Security Group' set to 'Administrator'. The 'Report Level' is 10, 'Status Level' is 10, and 'Price Break Movement Down' is -1. The 'Area' dropdown is set to 'Stock Transfer'. The following permissions are checked:

- ☒ Allow to View non Published Stock
- ☒ View
- ☒ Edit
- ☒ Add
- ☒ FINISH
- ☒ Unprint
- ☒ Allow to transfer from different branches
- ☒ Allow to transfer from all locations
- ☒ Allow FINISH Transfer from all locations
- ☒ Stock Adjustment

CardFile Security

Account manager security has been enhanced so you can restrict account managers from viewing jobs based on the Account Manager Value in the job/quote object or based on the account manager named on the customer Cardfile on the given job/quote object.

Done via **Tools > Options > CardFile**:

Options

CardFile

Card File Defaults

Price Level: 4

Terms: COD COD

Statement Via: Print Send Invoice Via: Print

Quick Add defaults

☒ Company

☐ Individual

Statement memo

Standard messages that will appear on your statements can be used to advertise upcoming events, or simply to remind Debtors of your trading terms. For example:

For electronic remittance, please us the following details:

BSB: 001 001
Account Number: 12345678

Account Manager Security on Objects (Jobs, Quotes & Projects)

☒ By Account Manager on Object

☐ By Account Manager of Customer on Object

☒ - Station level ☐ - Global level

OK Cancel