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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

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 scipts 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.

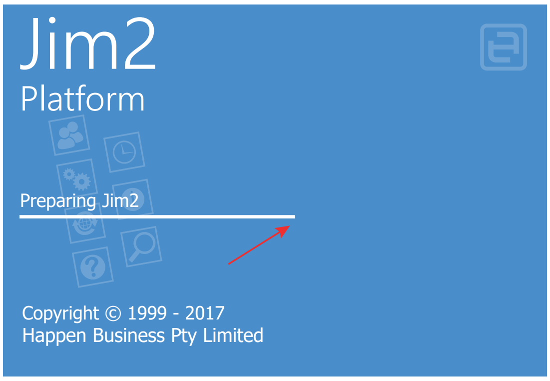
Although not obvious to users, the new v4.1 shared Jim2.exe is actually a bootstrap program which, when run, establishes whether the user has a matching version of Jim2 installed locally (on the user's computer or terminal server session). If not found, a new version is copied down to a location on the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

2. Extract contained files to the new folder created in step 1.

   - Jim2LocalService.exe
   - Jim2LocalService.exe.config

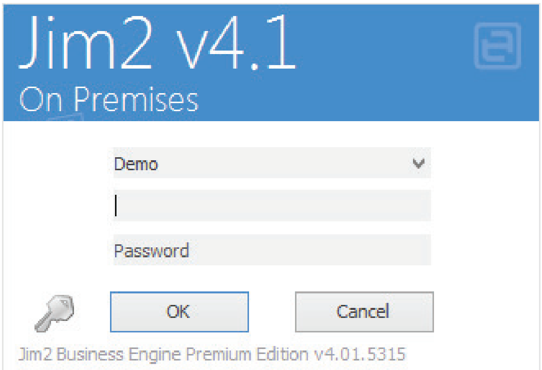
3. From a command prompt with elevated privileges, run the following from within the new directory:

   Jim2LocalService -install

4. Start the service and ensure it is set to 'Auto Start'.

New Splash and Login screens

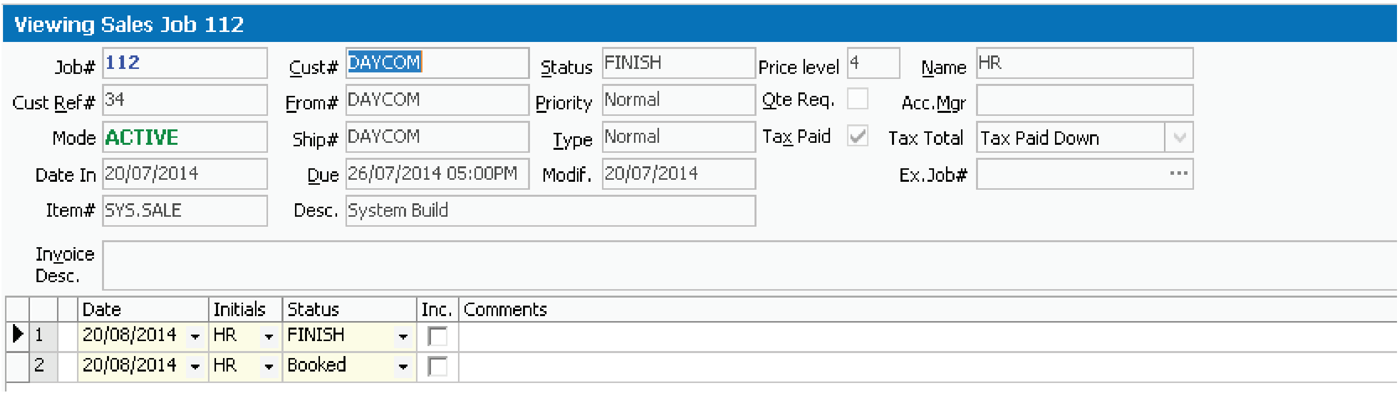
The splash and login screens have been updated with the introduction of Jim2.Cloud. From a user perspective, this is essentially an aesthetic change only.



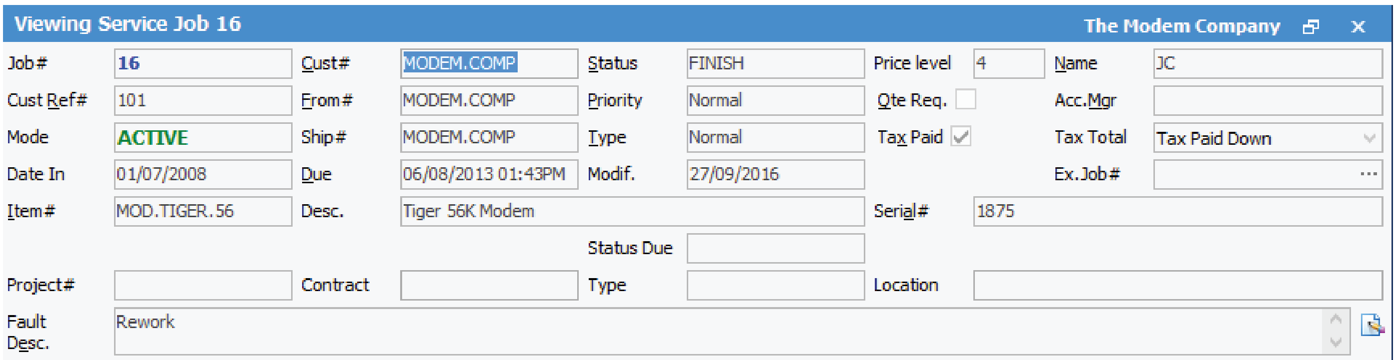
New Adaptive Layout

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:



New look:



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

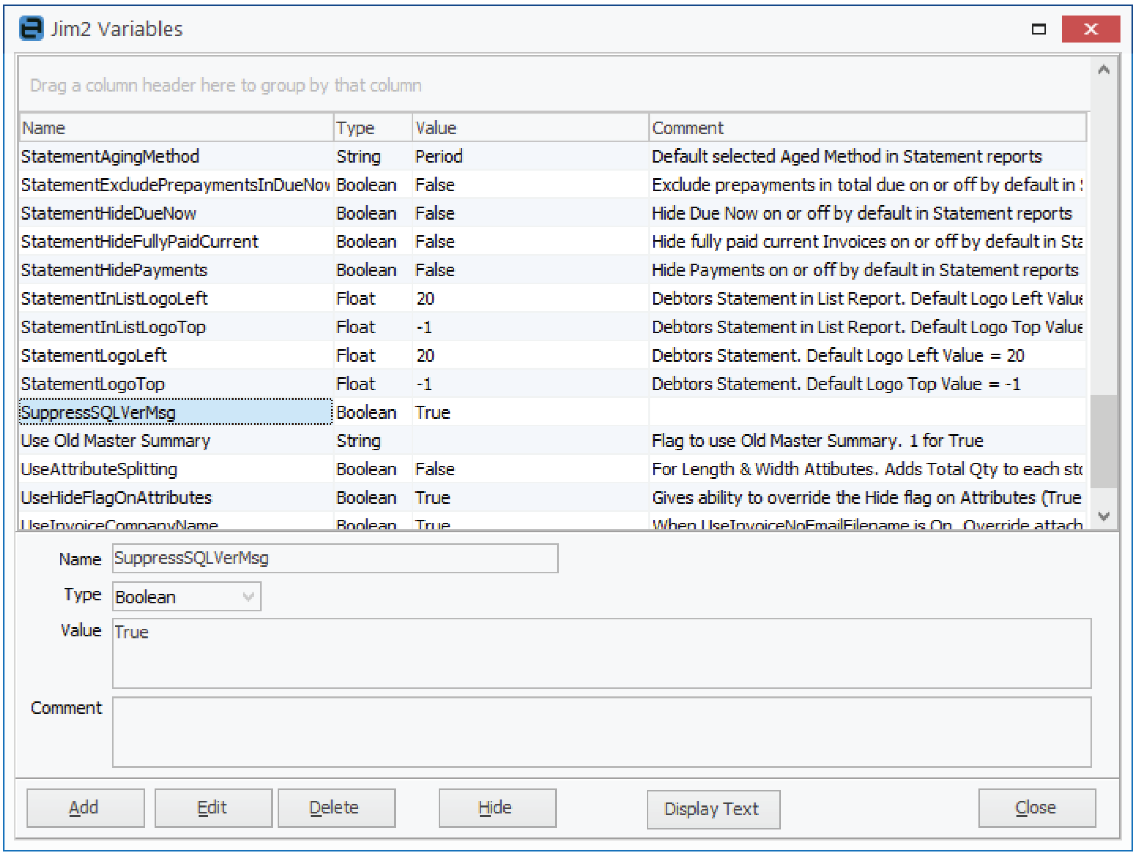
Post installation of Jim2 v4.1, the Jim2 eBusiness website must be refreshed using the JEF installer, otherwise users will receive errors when performing tasks such as meter read entry.

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'.



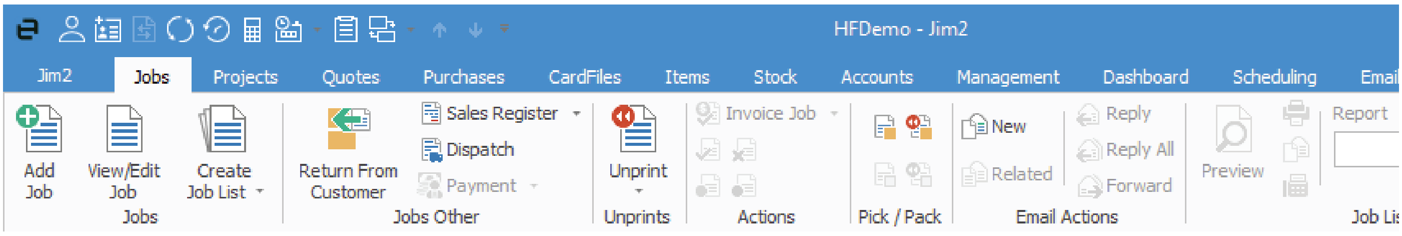
New Functionality in Detail

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?

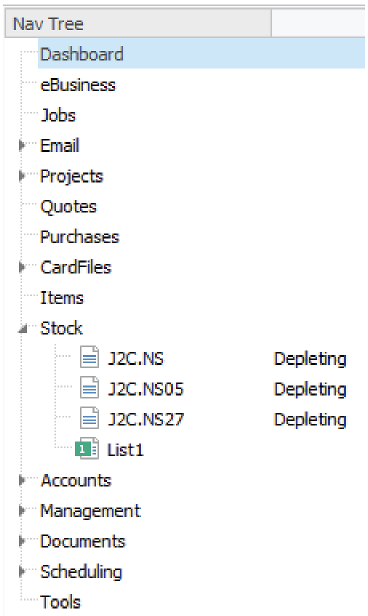
The skin/accent combination is a database level setting. Apart from your own personal preference, the main purpose of setting a skin and accent is to distinguish one database from another. Typically, this is your ‘main’ database vs your ‘training’ database, or in the case of running multiple companies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

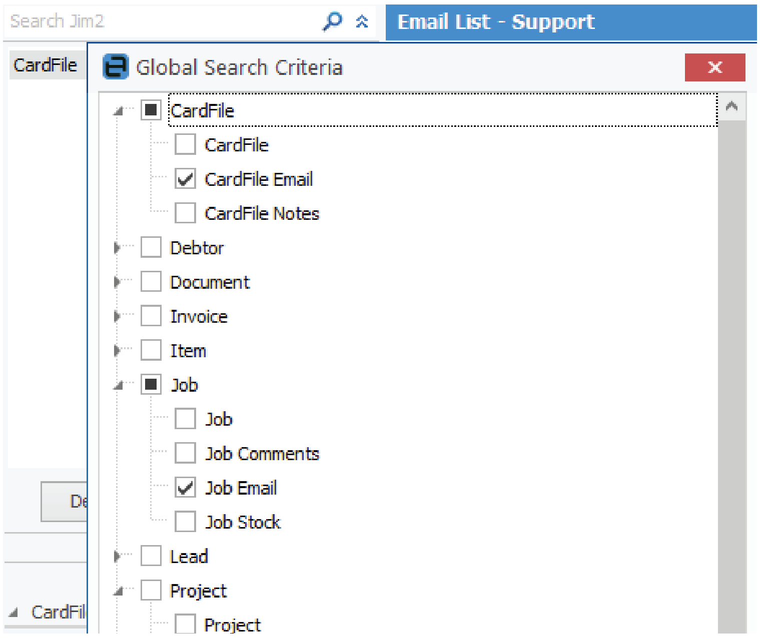
Navigation Tree Focus

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.



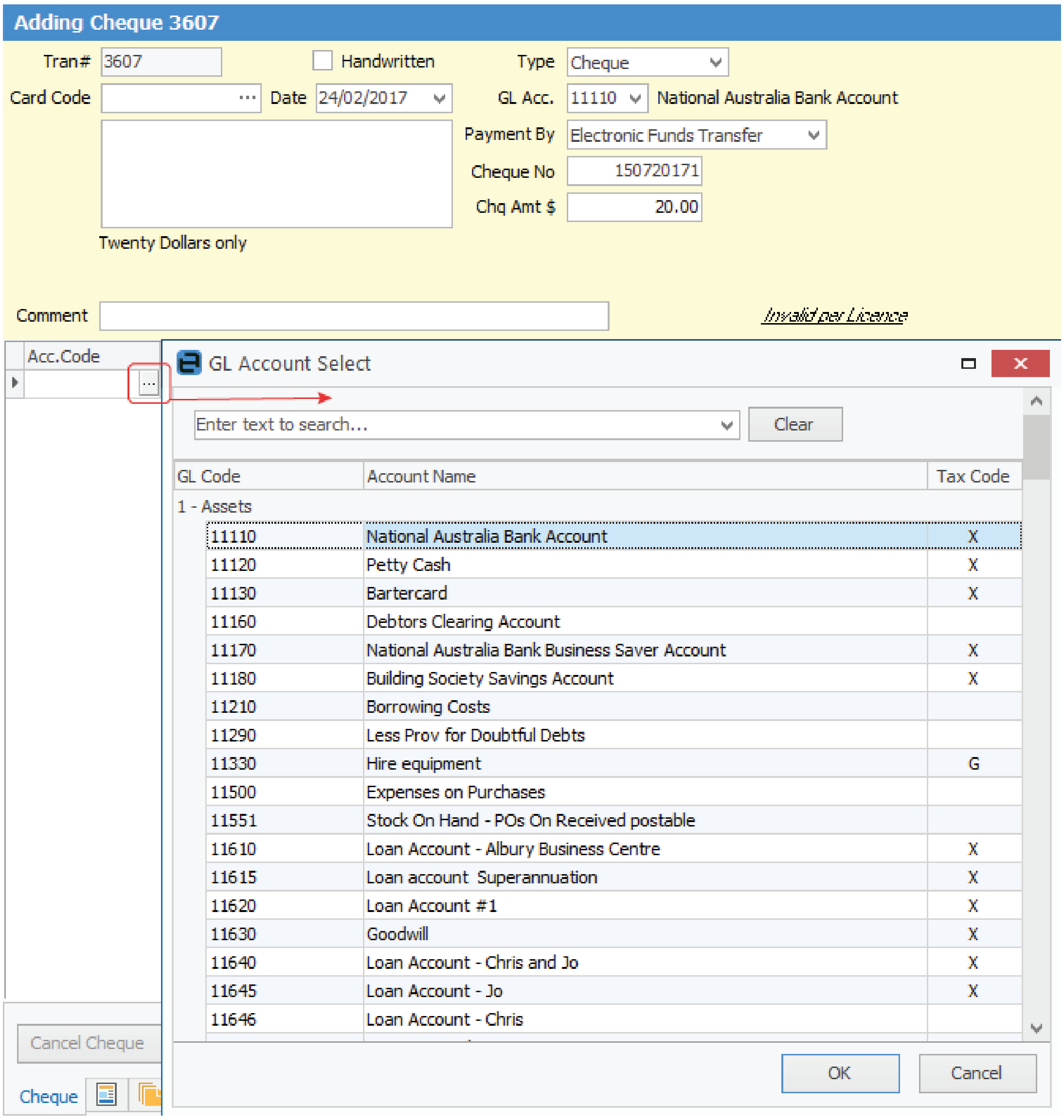
As shown in the example above, you can specifically search related emails from the search bar. Simply select beside the search field.

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



Jim2.Cloud

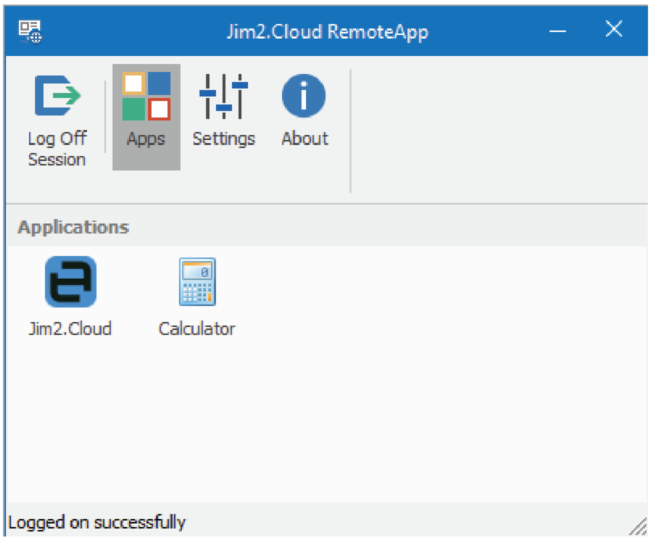
Jim2 v4.1 is now Cloud enabled, with many 'under the hood' changes specifically designed to enhance usage within Cloud and On Premises environments.

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-dtls-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-tls-1.1-and-tls-1.2-in-windows-7-or-windows-server-2008-r2

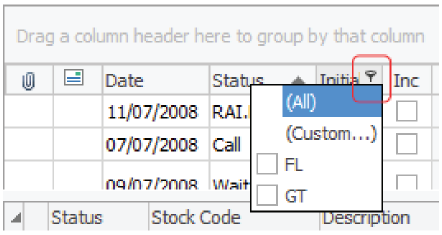
General

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.

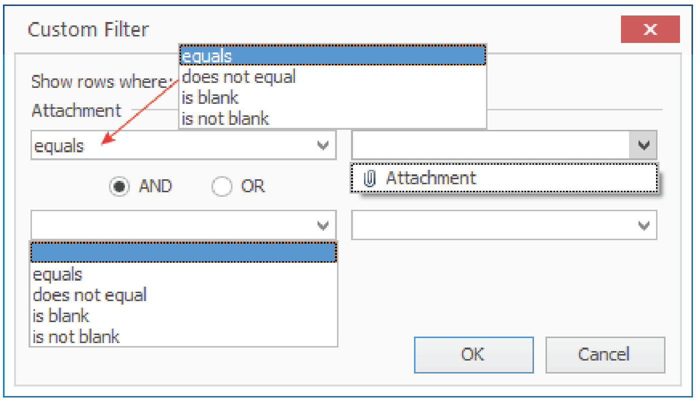
Filters

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.



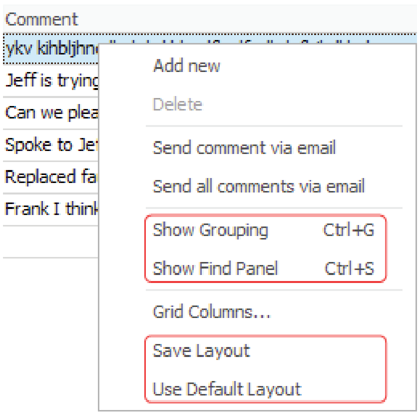
Custom Filter

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



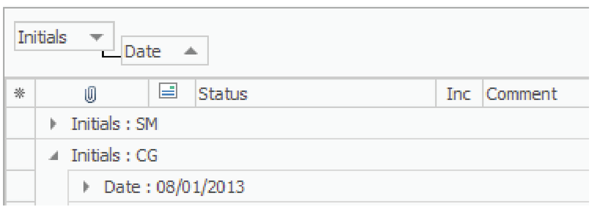
Find Panel and Grouping Options

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

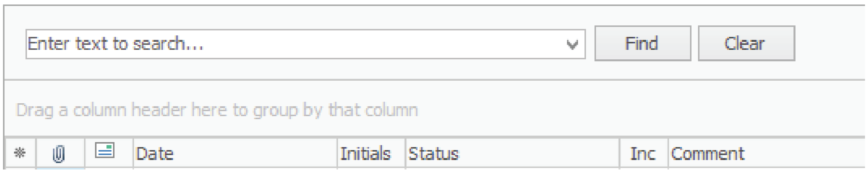


The available right-click menu now has four new options:

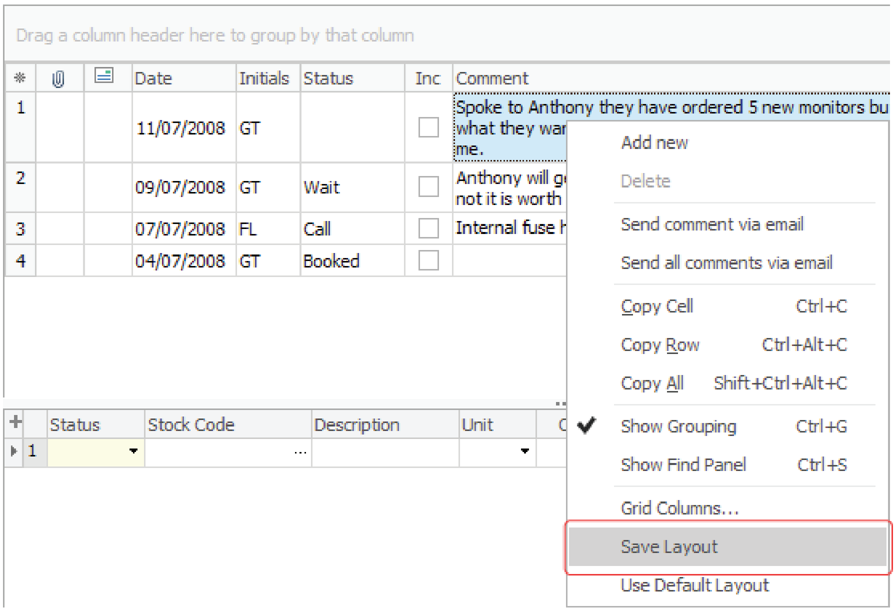
Show grouping – Adds the familiar List grouping option to the Comment grid so users can group by all available grid columns. (Ctrl+G)



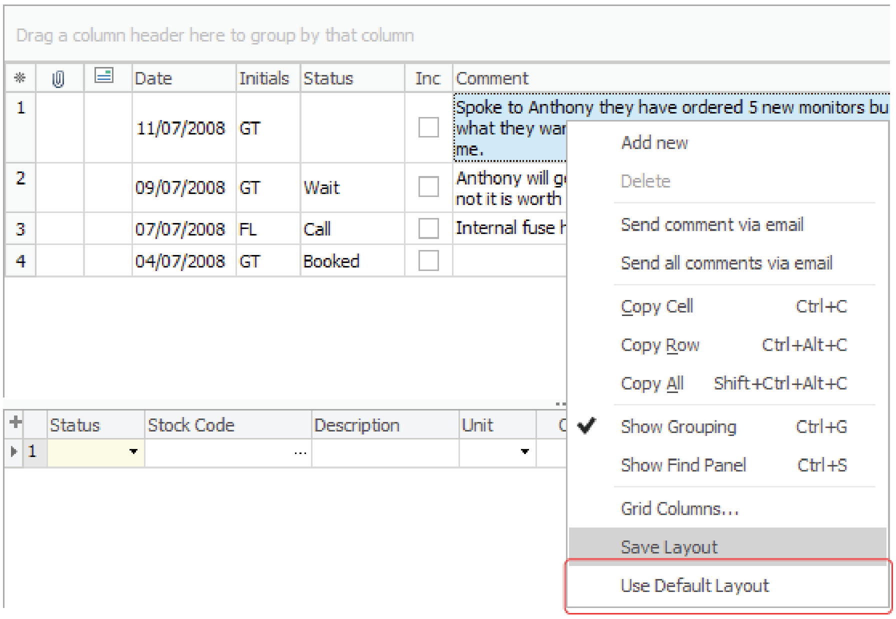
Show Find Panel – Enables the search panel, and gives the user the ability to search text within the grid. (Ctrl+S)



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.



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

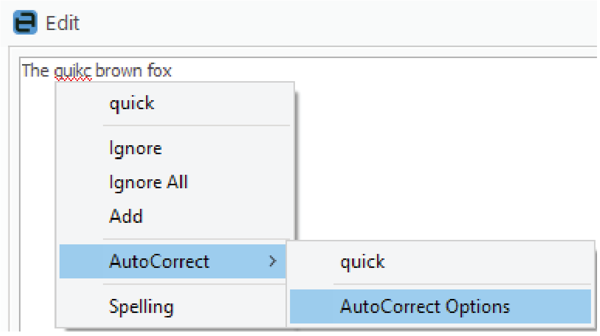


Spell Checker in comments and labour entry

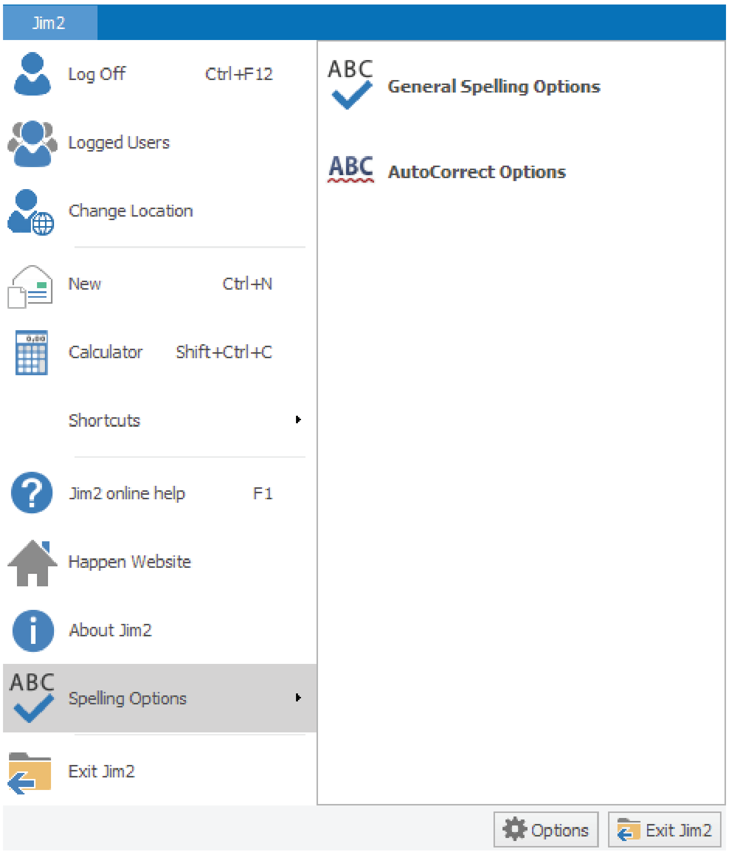
Spell checker now features within key text areas of Jim2, such as the Comments grid and email editor. A red squiggly line identifies words that may have been spelt incorrectly, producing a list of suggested replacements to select.

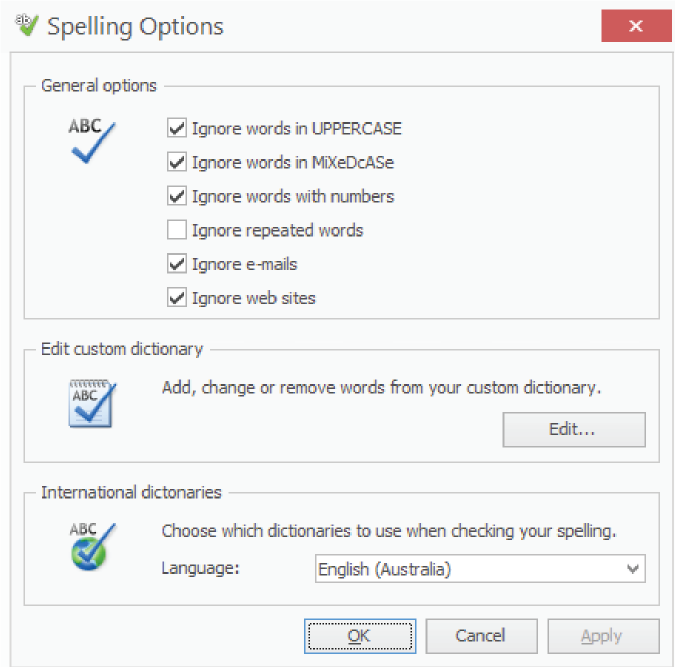
Jim2 now also features a range of AutoCorrect options which can be quickly adjusted. Note that all settings for Spelling Options are set at a user level.

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



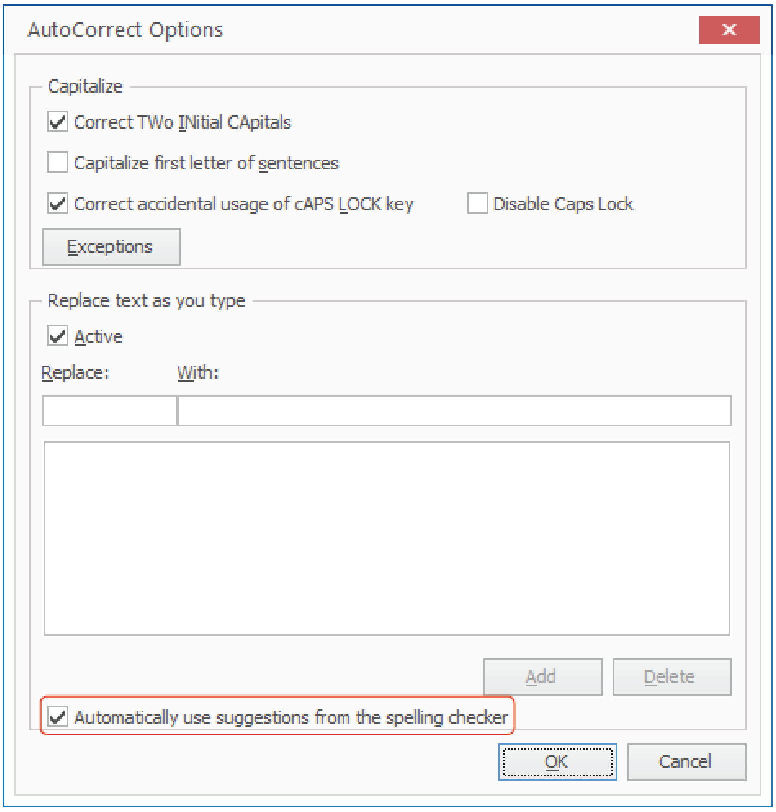
Or go to the Jim2 menu and select Spelling Options.





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.

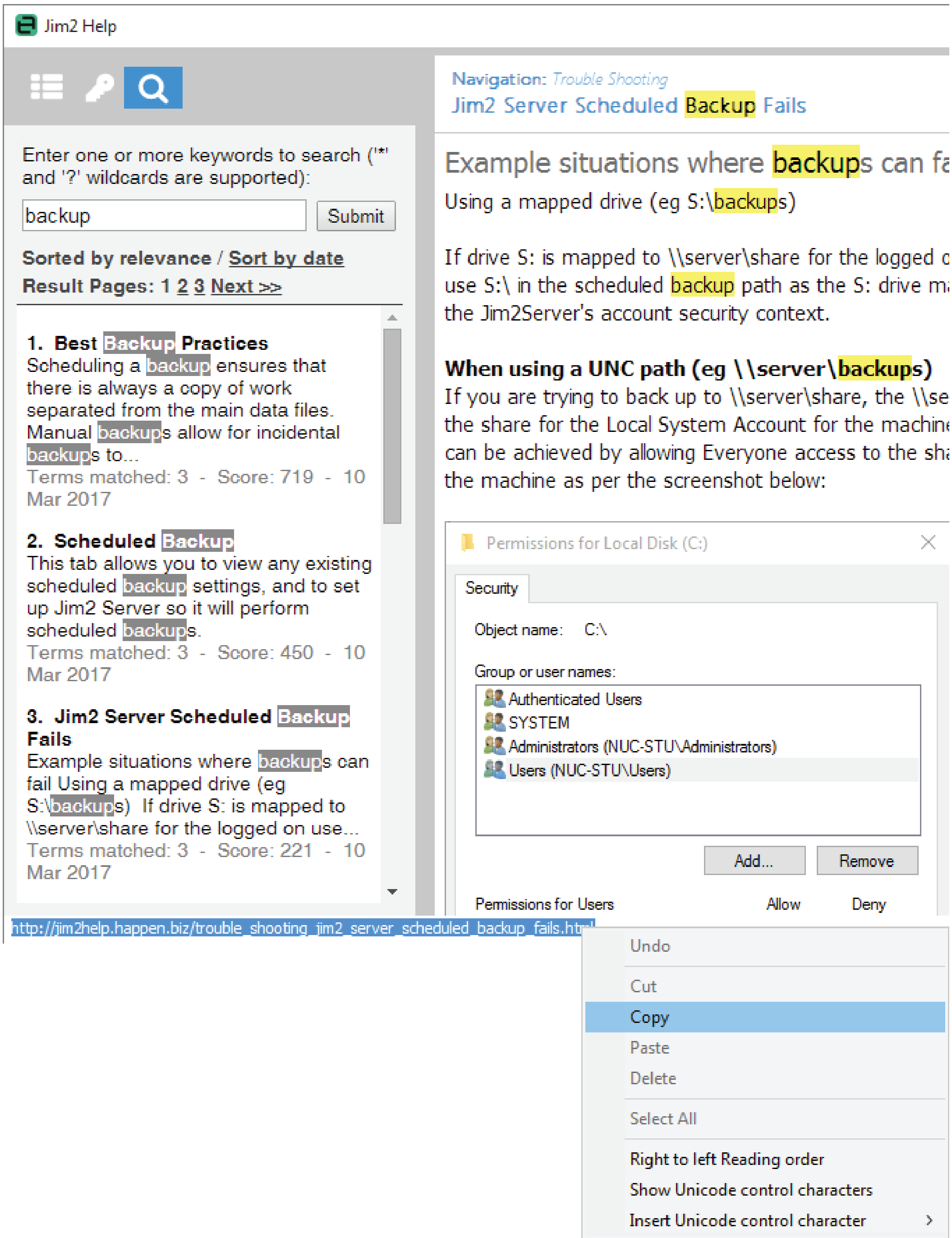


Jim2® Online Help

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.



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.

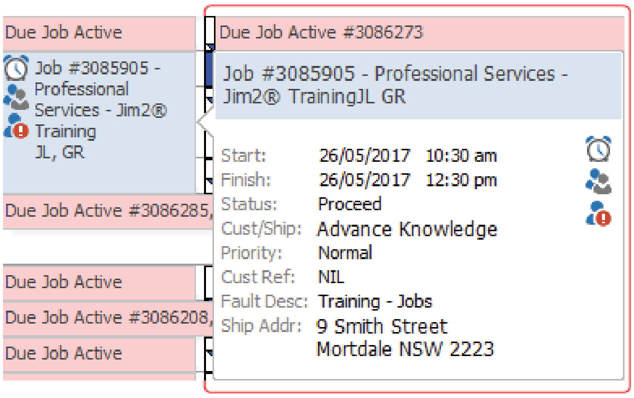
Navigate the Help File using the table of contents, keyword index, and search topics sections. The keyword index is now much more comprehensive, and will continue to be expanded into the future.

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

Scheduling Improvements

Preview

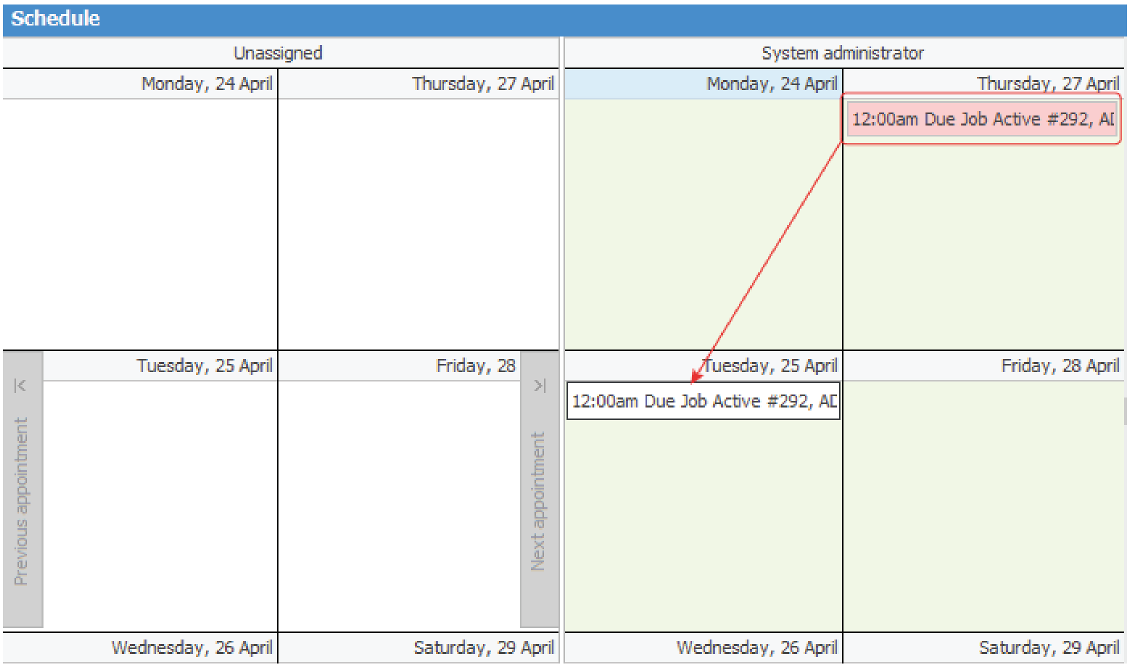
Hovering your mouse over any entry in the Schedule will bring up detailed information within the preview. This relates to jobs and meetings etc.



Due Date

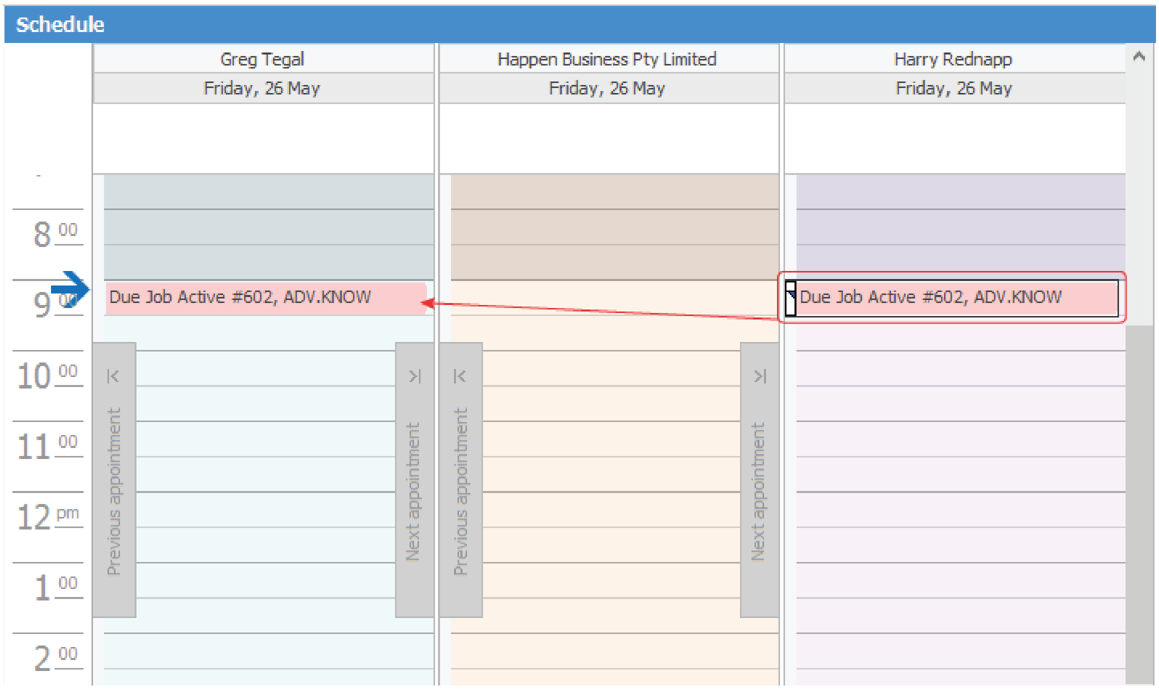
You can now double click an entry to open a job directly from within Scheduling.

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



Reassign Due Job Active

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

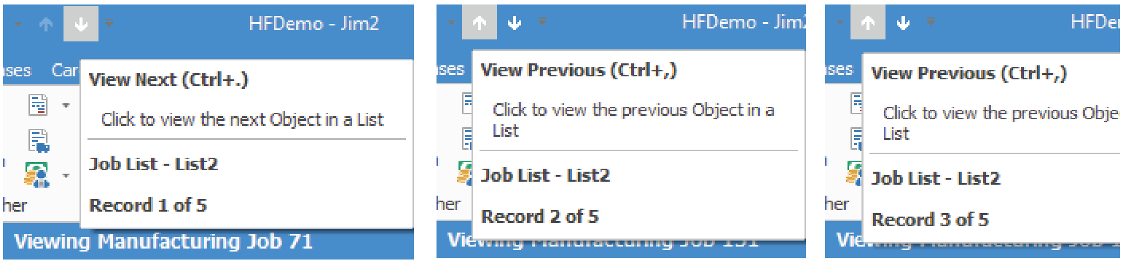


Security to perform this function is determined by a user's access to edit their jobs and scheduled tasks and access to edit other users jobs and scheduled tasks. This is set via **Tools > Security**.

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.

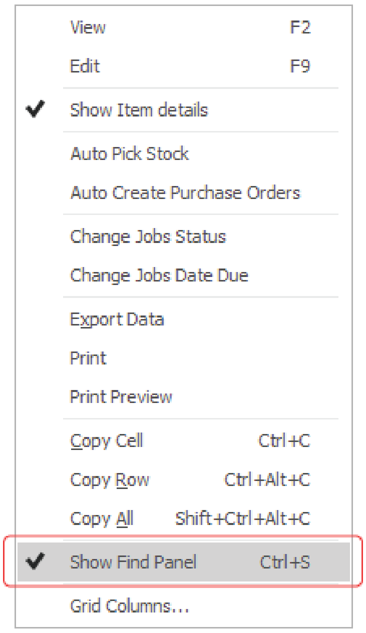


Shortcut keys for these items are:

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

New Find function

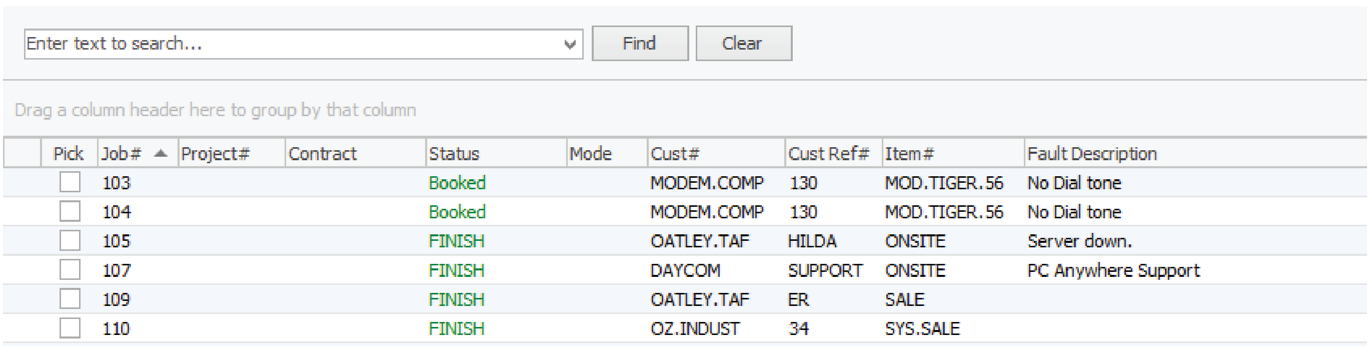
The find panel is available from object lists, in addition to the comments grid. Right click anywhere within a list to bring up the menu, left click and select **Show Find Panel**.



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

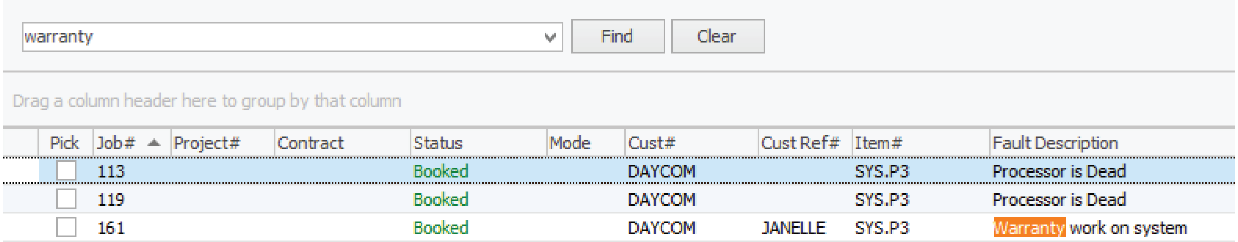
Enter a search value and the list display will be dynamically updated to show only the list objects that match. This is great for quickly finding things like a specific job based on its fault description within a large list of jobs.

Before:



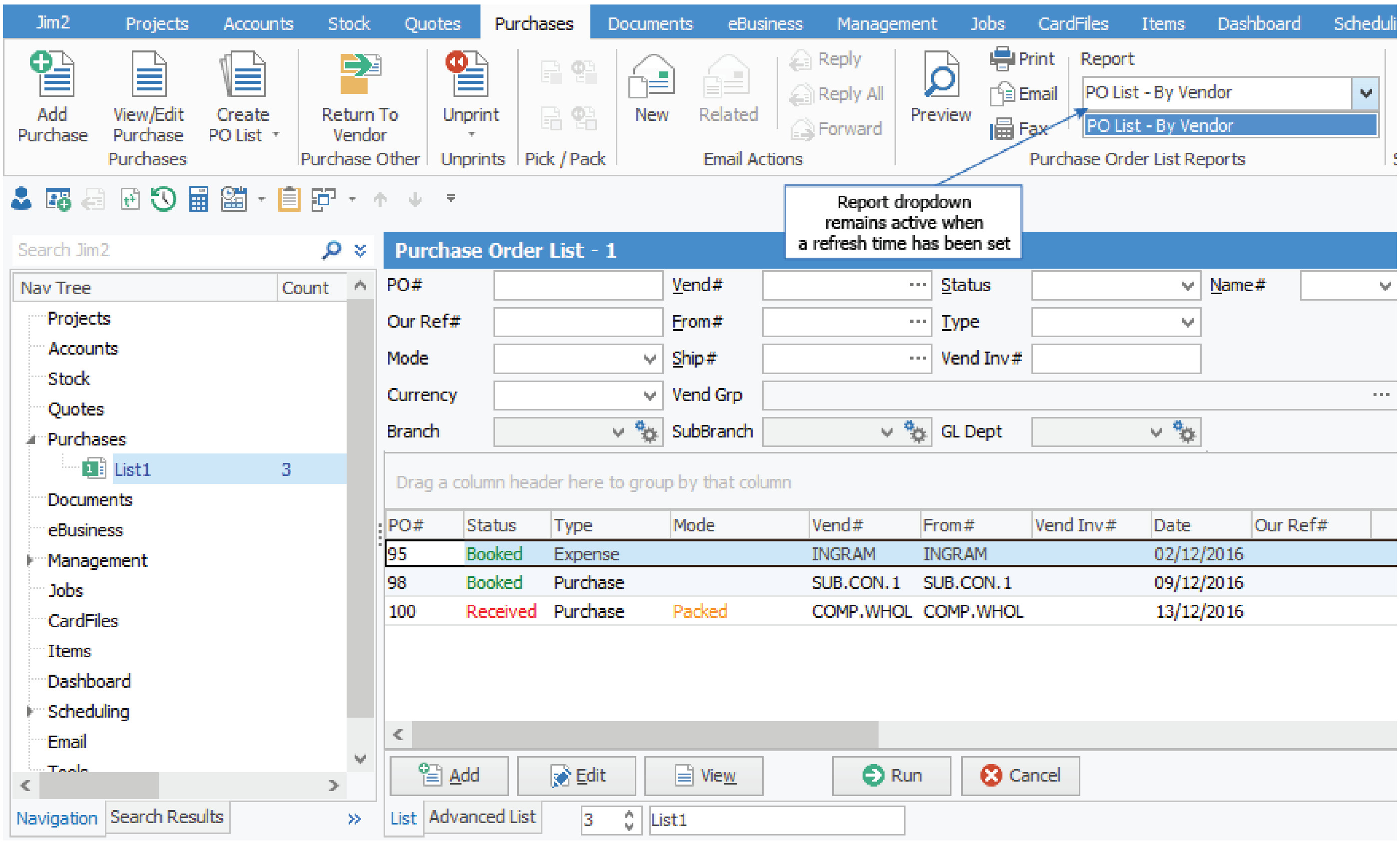
Pick	Job#	Project#	Contract	Status	Mode	Cust#	Cust Ref#	Item#	Fault Description
	103			Booked		MODEM.COMP	130	MOD.TIGER.56	No Dial tone
	104			Booked		MODEM.COMP	130	MOD.TIGER.56	No Dial tone
	105			FINISH		OATLEY.TAF	HILDA	ONSITE	Server down.
	107			FINISH		DAYCOM	SUPPORT	ONSITE	PC Anywhere Support
	109			FINISH		OATLEY.TAF	ER	SALE	
	110			FINISH		OZ.INDUST	34	SYS.SALE	

After:



Running Reports from Live Lists

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



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.

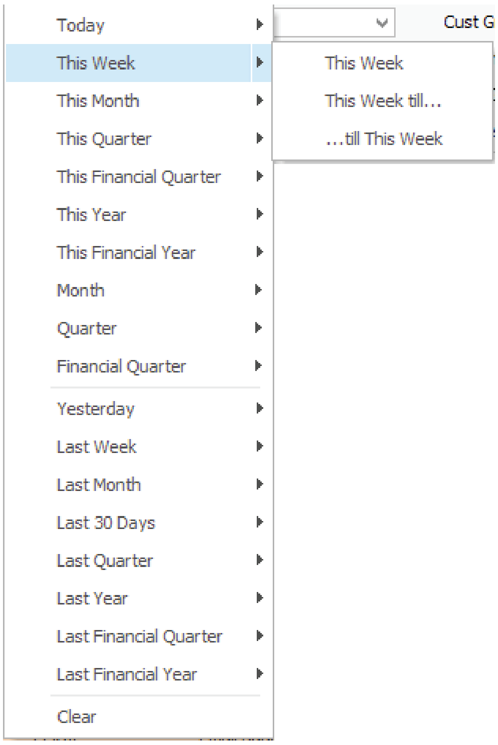
Key benefits to the business:

- 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

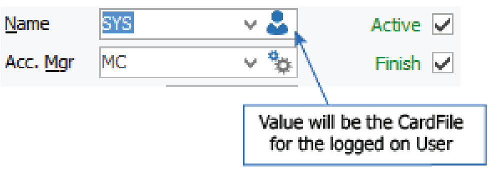
Updated Date/Time picker

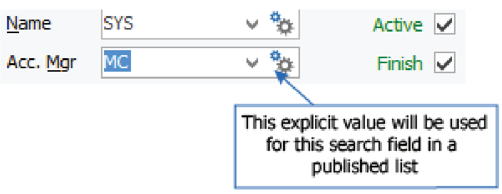
The Date/Time picker found within the advanced filter options for lists has been updated to include an increased number of relative date options – 'This week till …', '…Till This week', and many more – to help users refine custom list date selections.



Relative Names

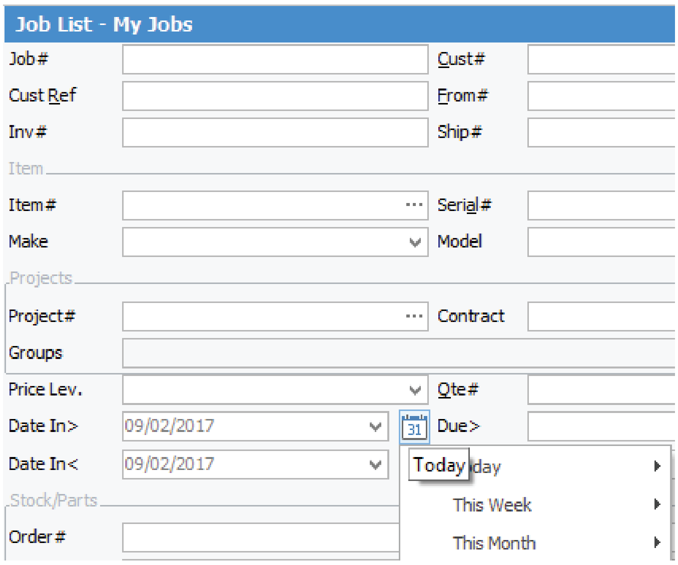
Relative names have been introduced to assist the new Published List functionality. Options include a variable value based on logged on user, or explicit value, as per previous versions of Jim2.





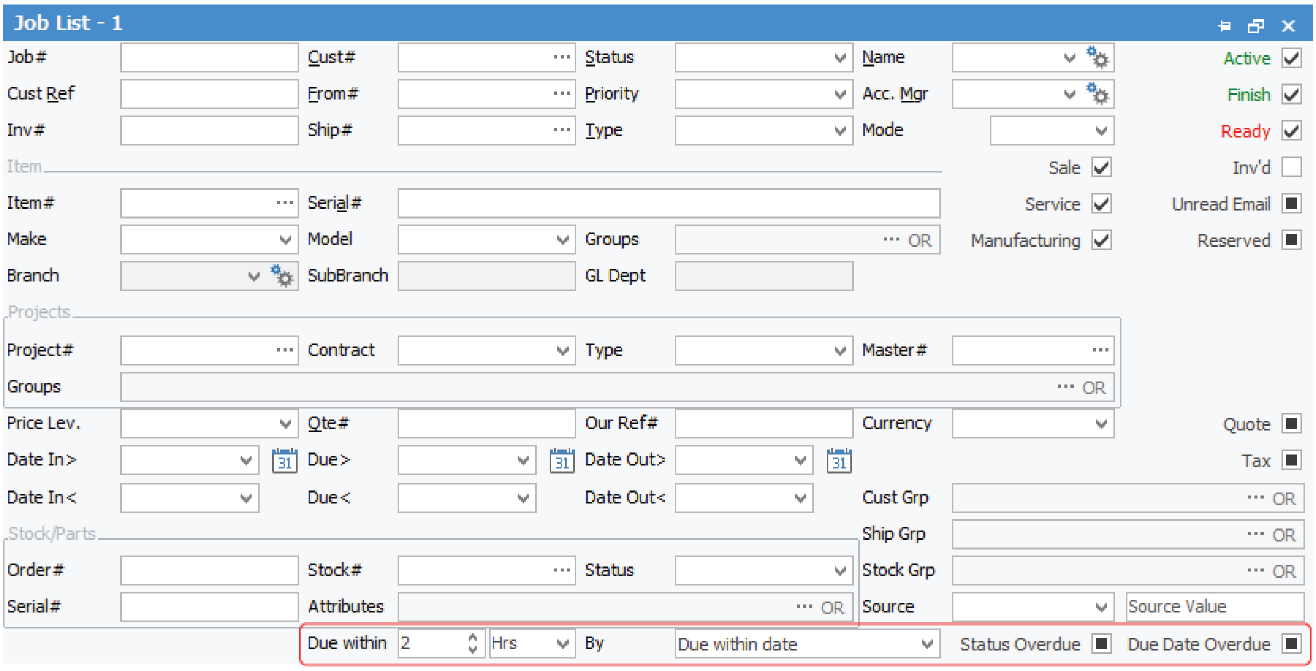
Relative Dates

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.



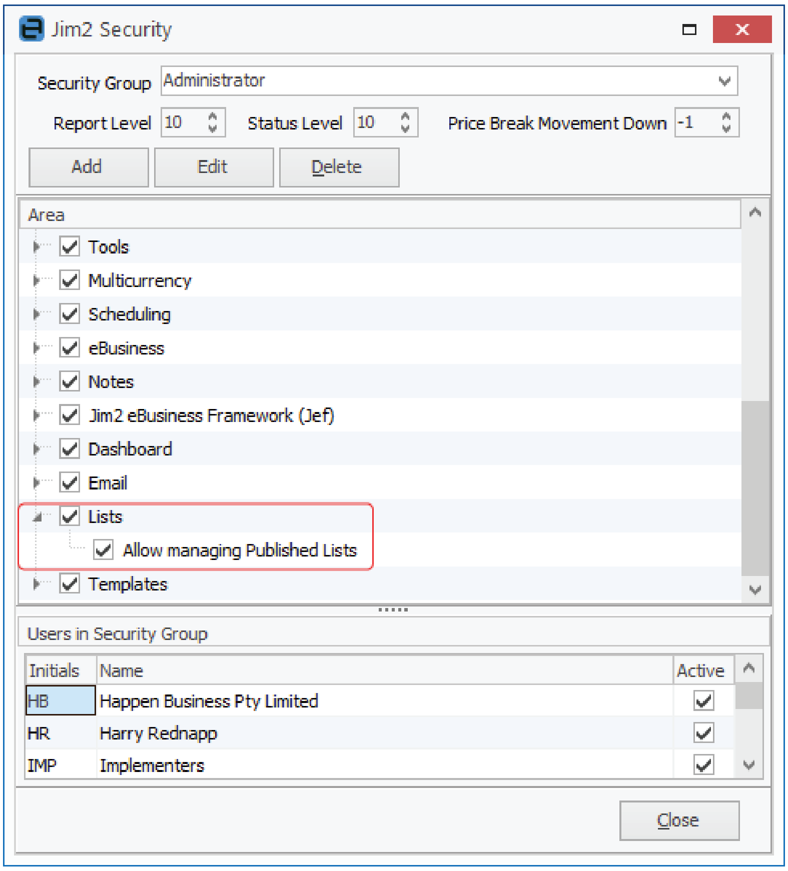
Due Date and Status Overdue filters

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.



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.



How to Structure Published Lists

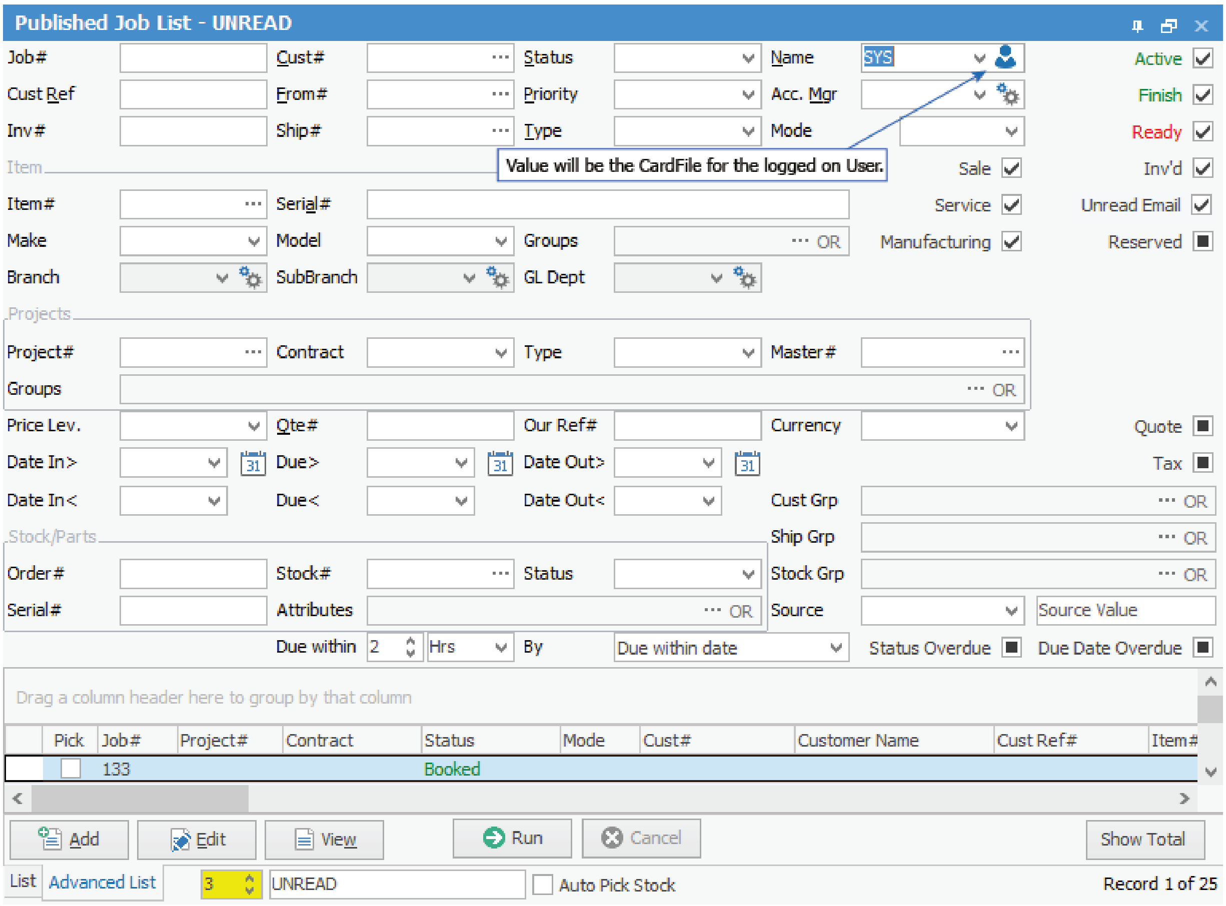
Now is a good time to reassess your use of Lists and your company workflow to ensure all users have lists most appropriate to their day-to-day work needs and company workflow requirements.

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.

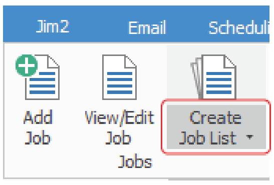


In the example above, we have created a list called 'UNREAD'. We have pinned the list, and set it to refresh every 3 minutes,.

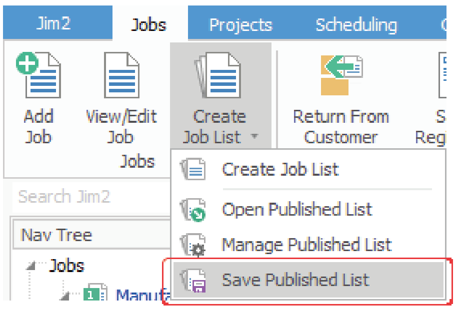
You can see we have set the list filter to show all Active, Finished, Ready and Invoiced jobs that have 'Unread Emails' attached to the jobs.

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.

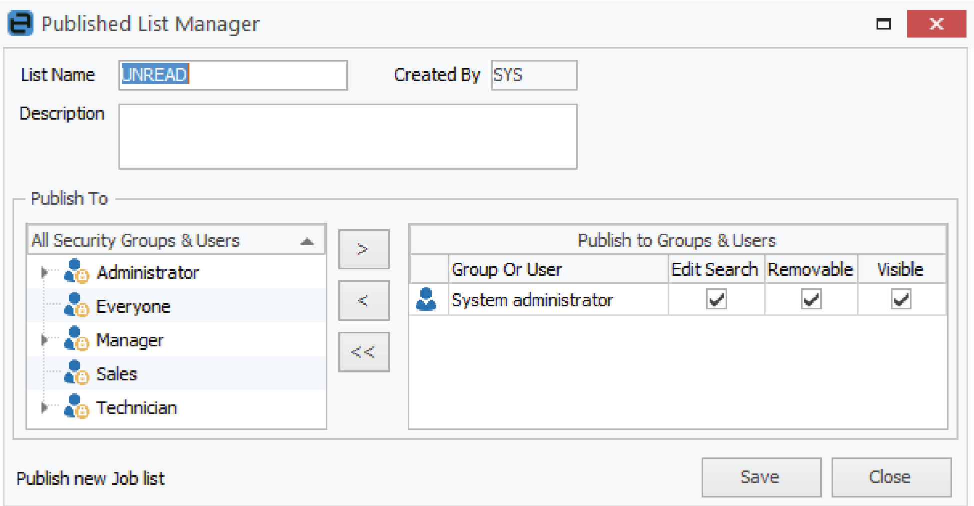
Step 2. Save the list you have configured as a 'Published List' using the Jim2 Ribbon. Select the bottom section of the applicable 'Create List' icon (in this case, a Job List) to view the new Published Lists options.



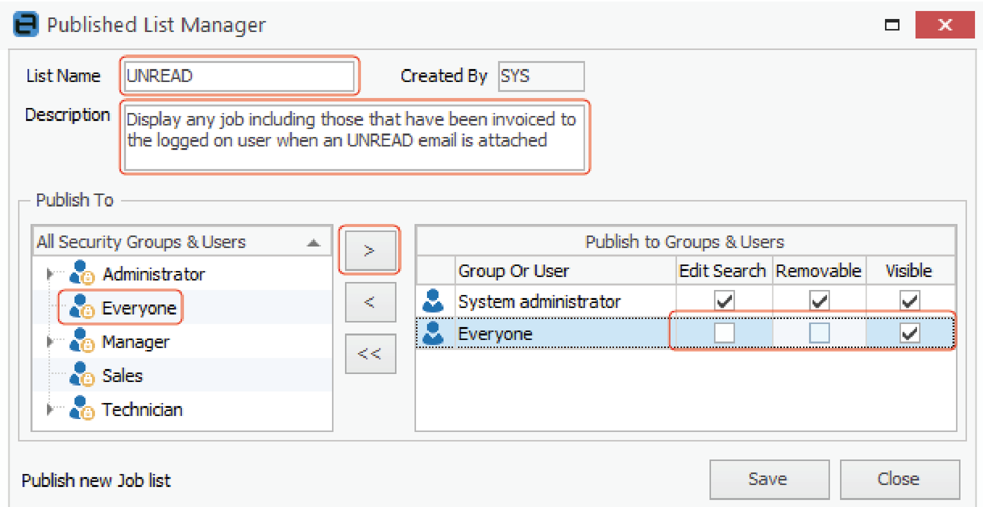
Select 'Save Published List' to continue.



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



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

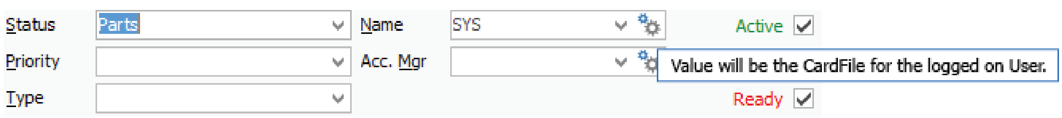


In the image above, you can see the key areas have been highlighted –

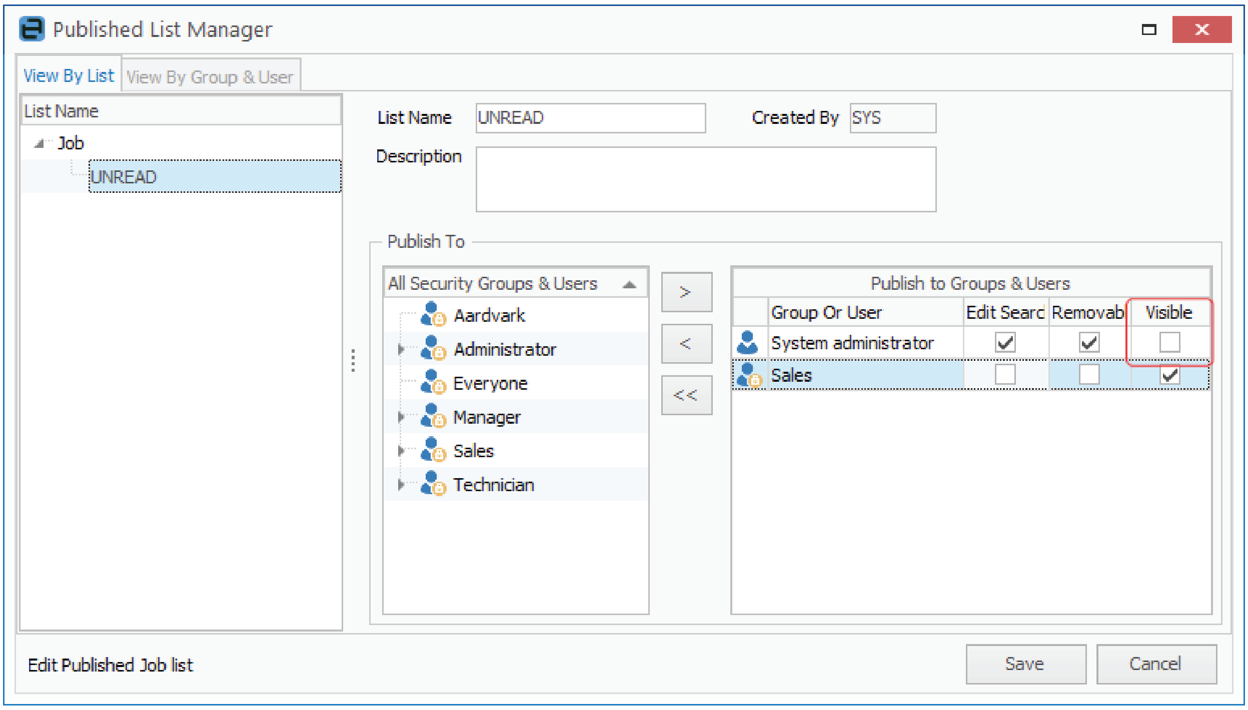
List Name:	The name of the list.
Description:	The description of the list is shown to users above the list filter.
Publish to Settings:	Select users by name, group, or simply select everyone to send to all. Then determine the level of access.
Edit Search:	Ticking this option enables users to edit the 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.



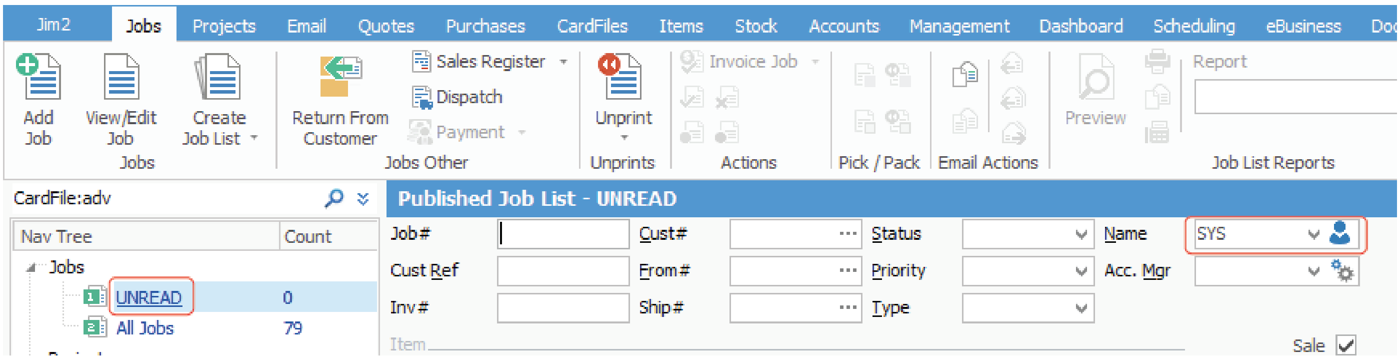
In this example, you can see the ‘Visible’ tick has been removed from the System administrator group, as we don’t want this list to be published to System admins – only those in the Sales group view and receive the published list.



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.

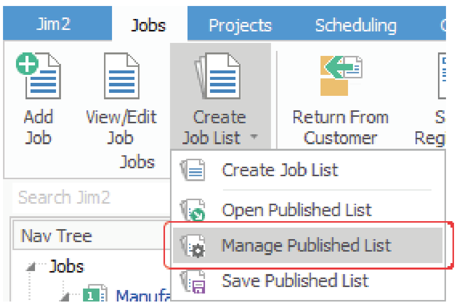


How Many Lists Can I Have Open?

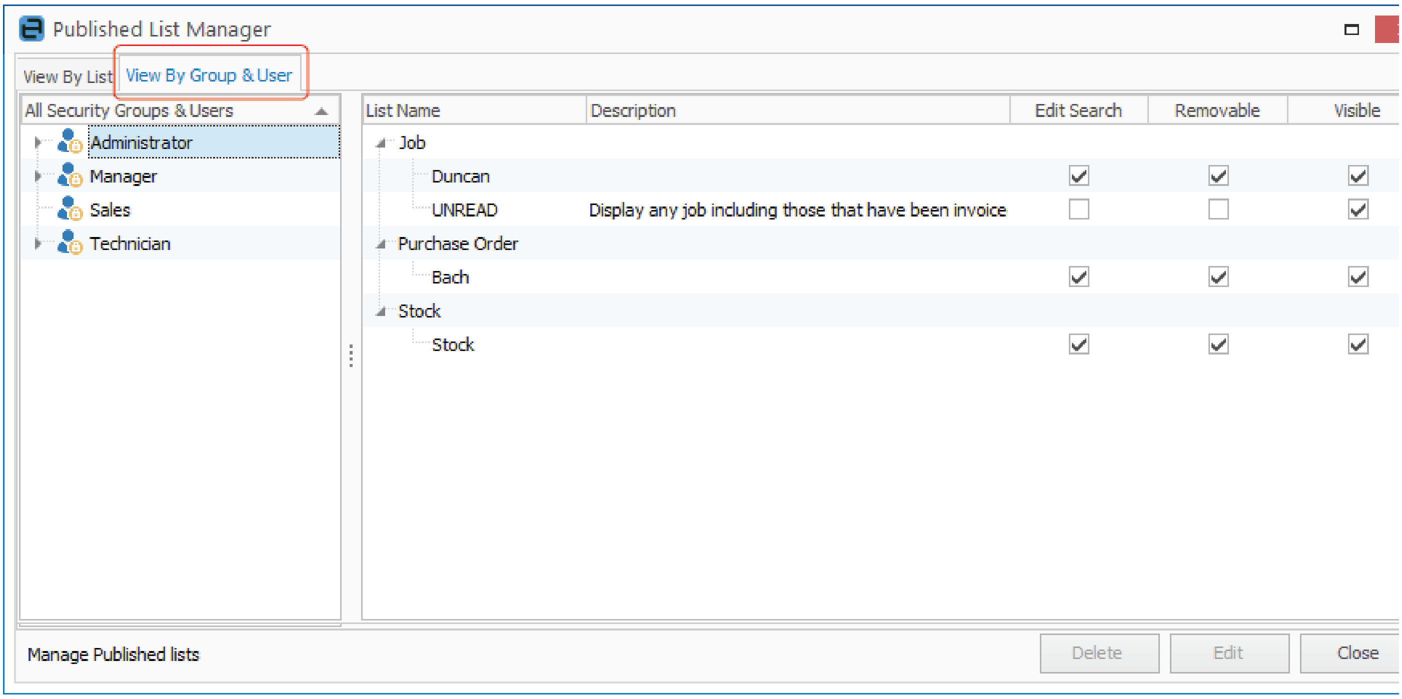
Maximum 20 objects lists open at once. Should a user already have 20 object lists open within the Nav Tree, the quantity of published lists pushed to users will cause the same quantity of existing lists to be removed from the user’s nav tree, ie. three new lists published would see the last three lists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

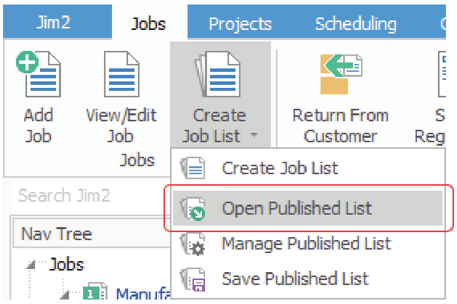


The image following has the alternate **View By Group & User** selected, which is an ideal way to see a summary view of the lists that will be displayed to a given user group.

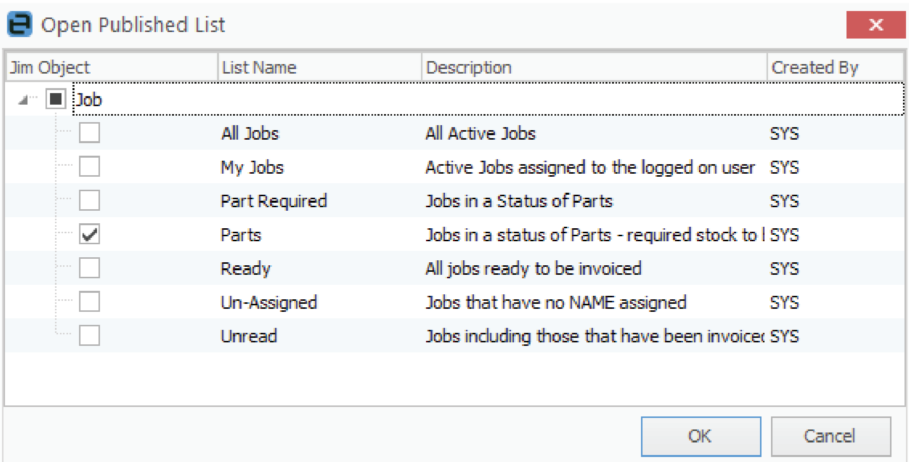


Opening Published Lists

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



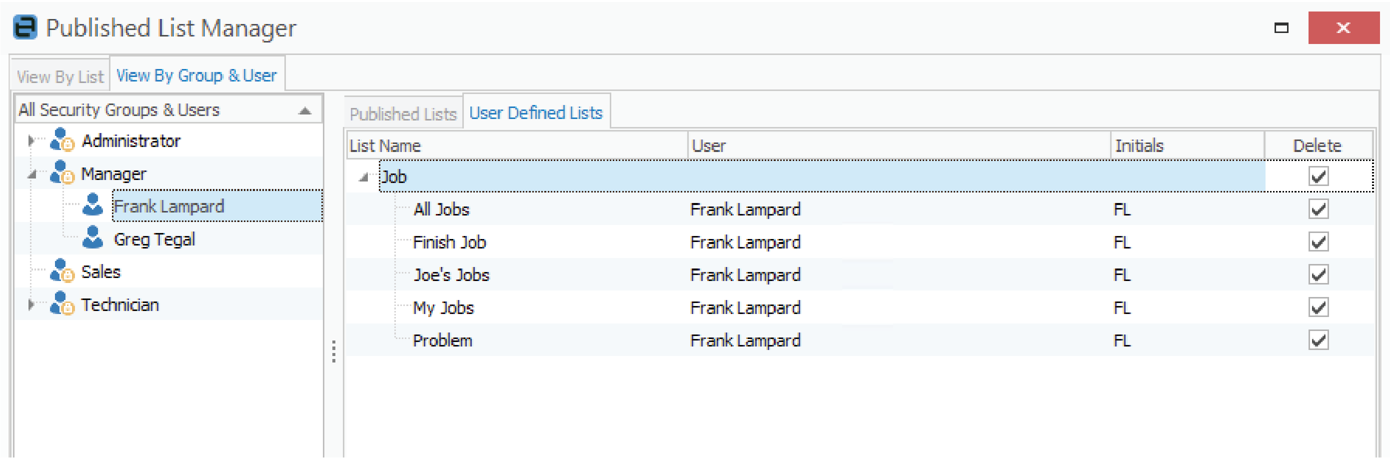
Note: it is only possible to open lists where you have permission and access to do so.



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.



CardFiles

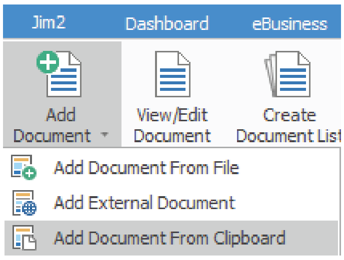
Ship Suburb and Ship Att field sizes have been increased.

Documents

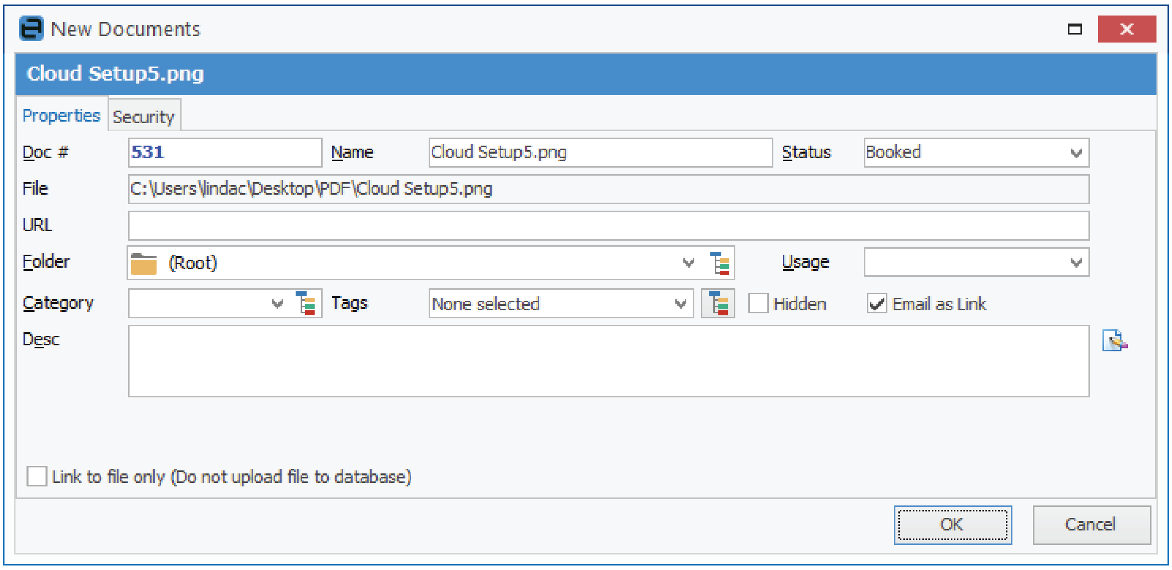
Add Document Options

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.

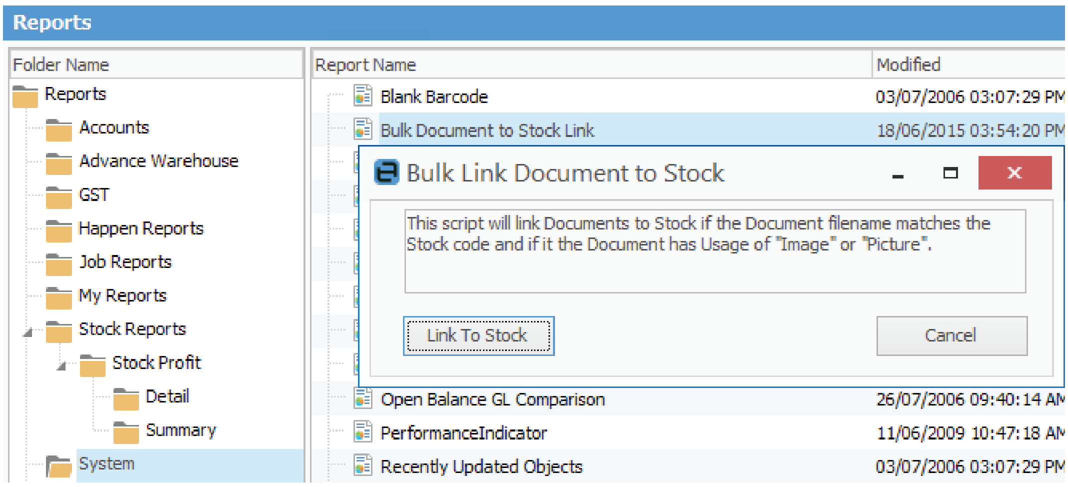


Once one of the three options is selected, users will complete the document details, including selecting a folder, category, tags, usage, etc, using the existing process in Jim2. To complete the process, select OK.

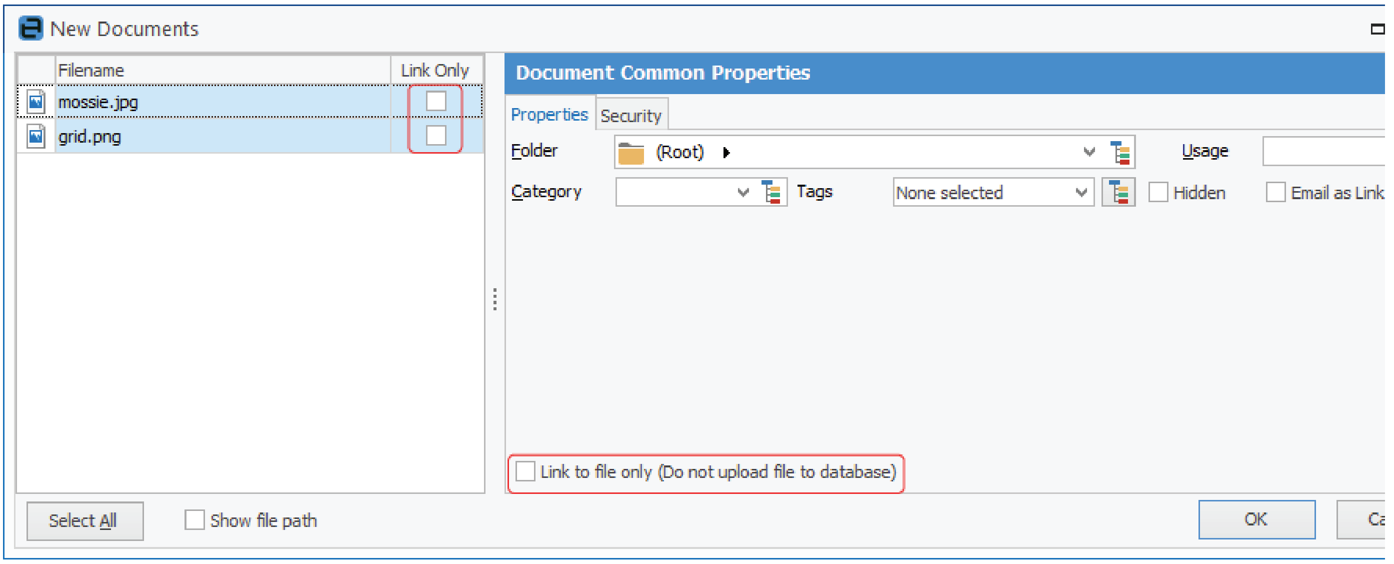


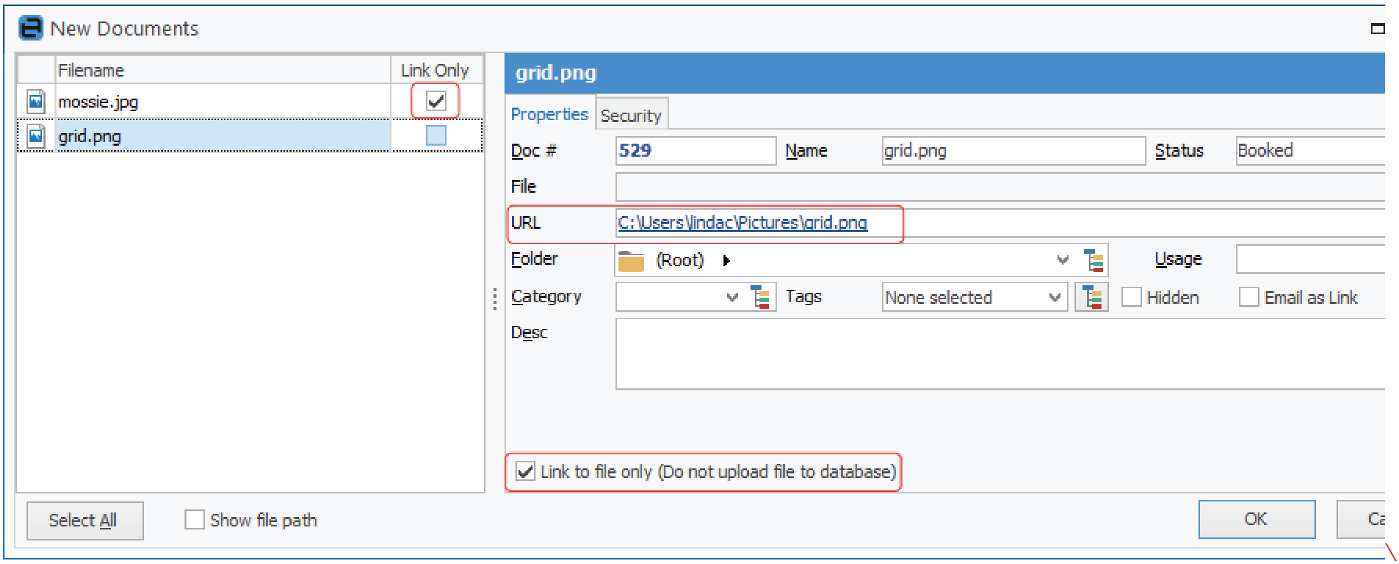
New Bulk Link Document to Stock Report

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.





Improved document match handling

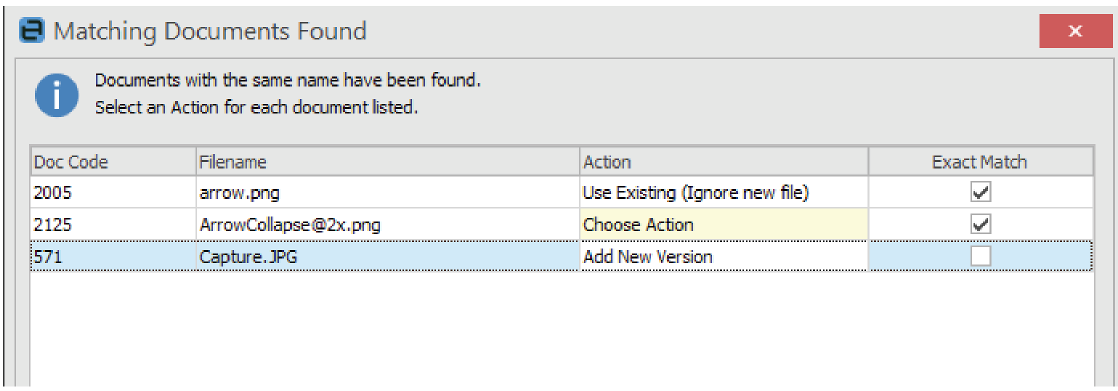
When adding a document to Jim2 that has the same name as an existing Jim2 document, you will be prompted with a confirmation as to how you wish to handle the addition. Previously, you were only prompted when the document names and content were an exact match. You will now receive a prompt as per below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

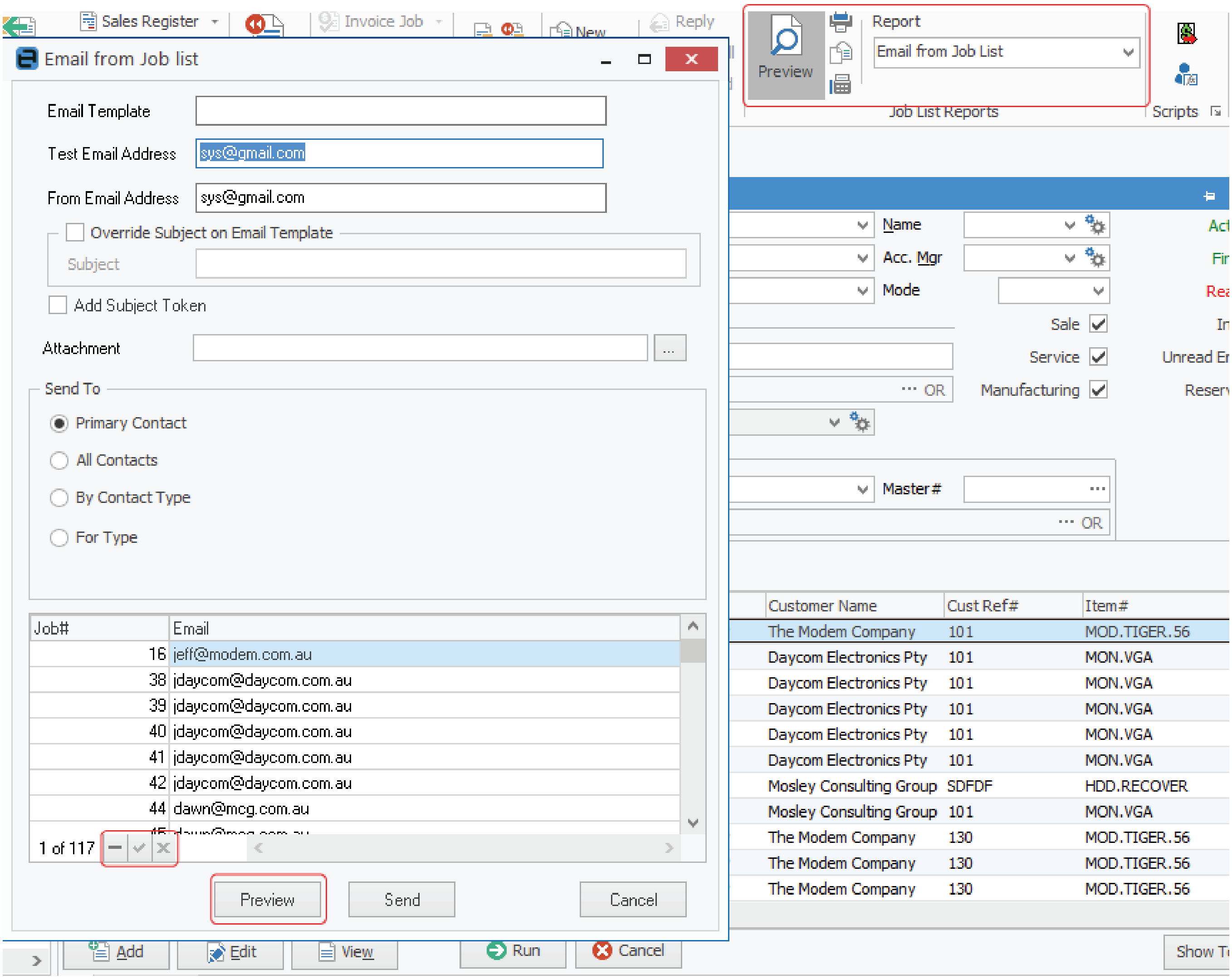


Email

Bulk Email from CardFile, Job and Project List enhancements

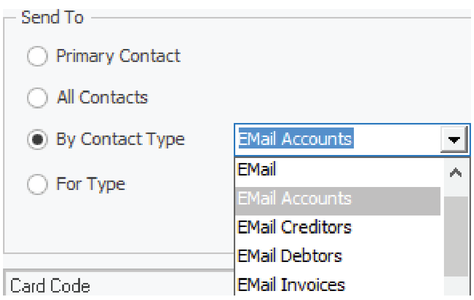
The bulk email function for CardFile lists has been improved, and is now also available from Project, Quote and Job lists. These enhancements now make it very easy to generate templated outbound emails.

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.



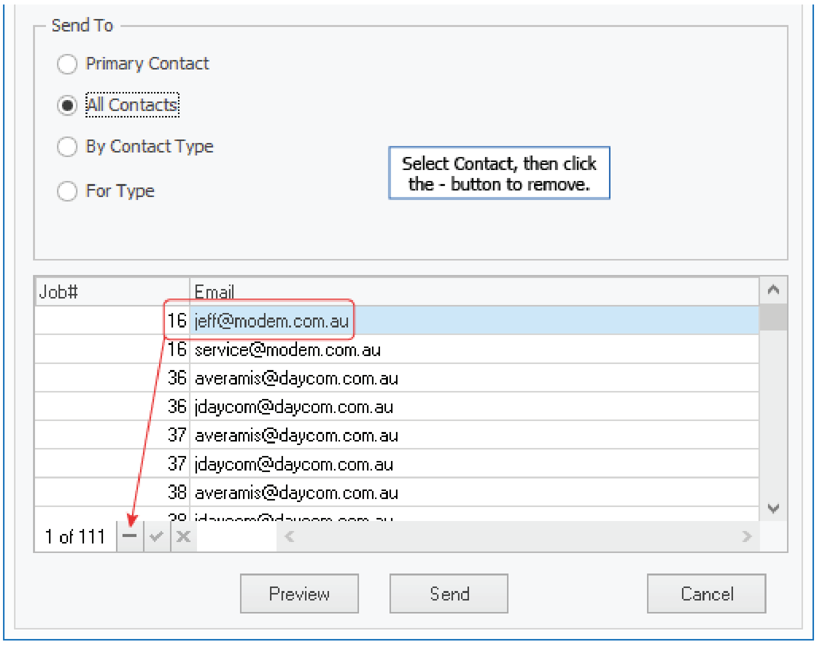
Create a New Bulk Email

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.



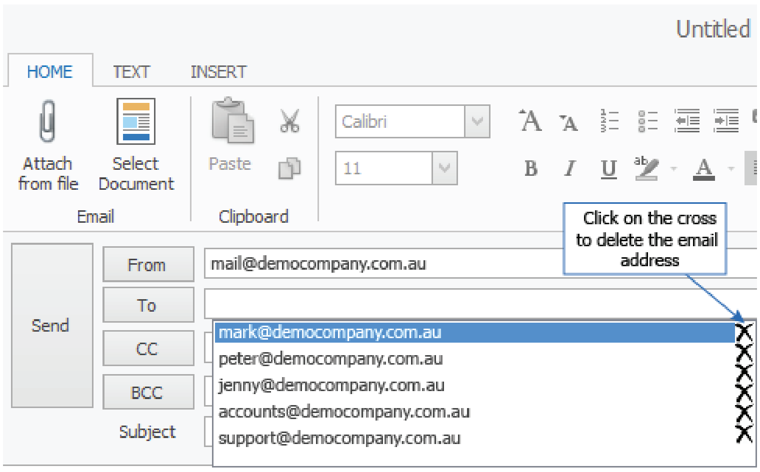
   - **For Type** – select contacts based on the existence of any configured Contact Type, and with the ability to choose which value with 'Email'.

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.



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.



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).

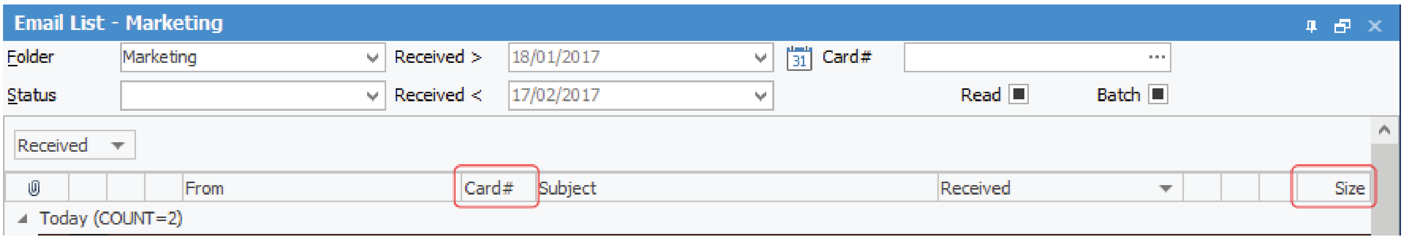
Then, from anywhere in Jim2 you can send an email to that address, and the client will receive it via SMS.

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

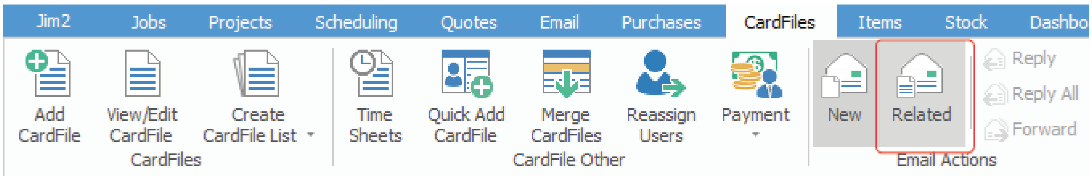
There are now two extra columns within the Email list:

- **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.

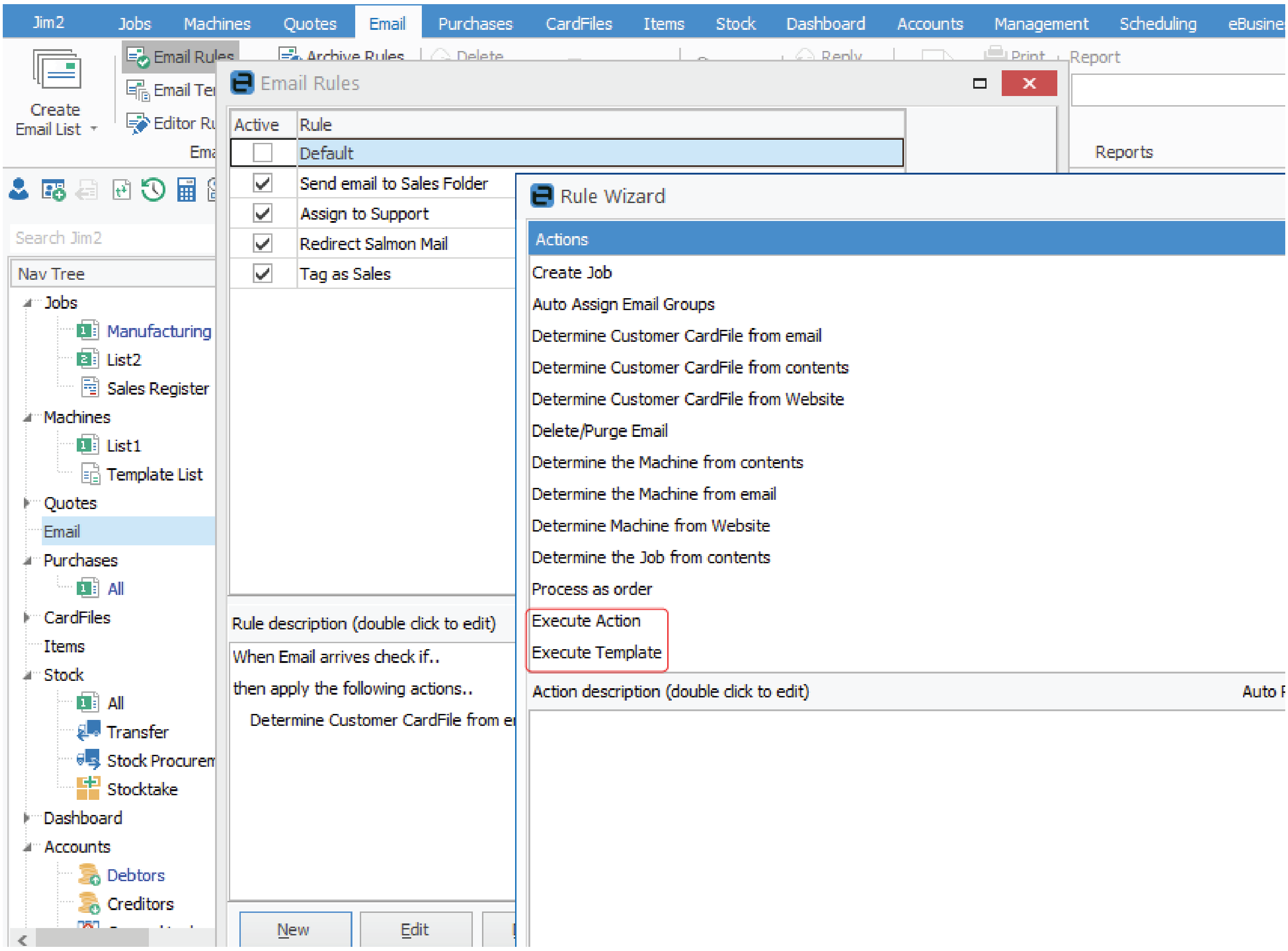
Email attachment handling improvements

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.

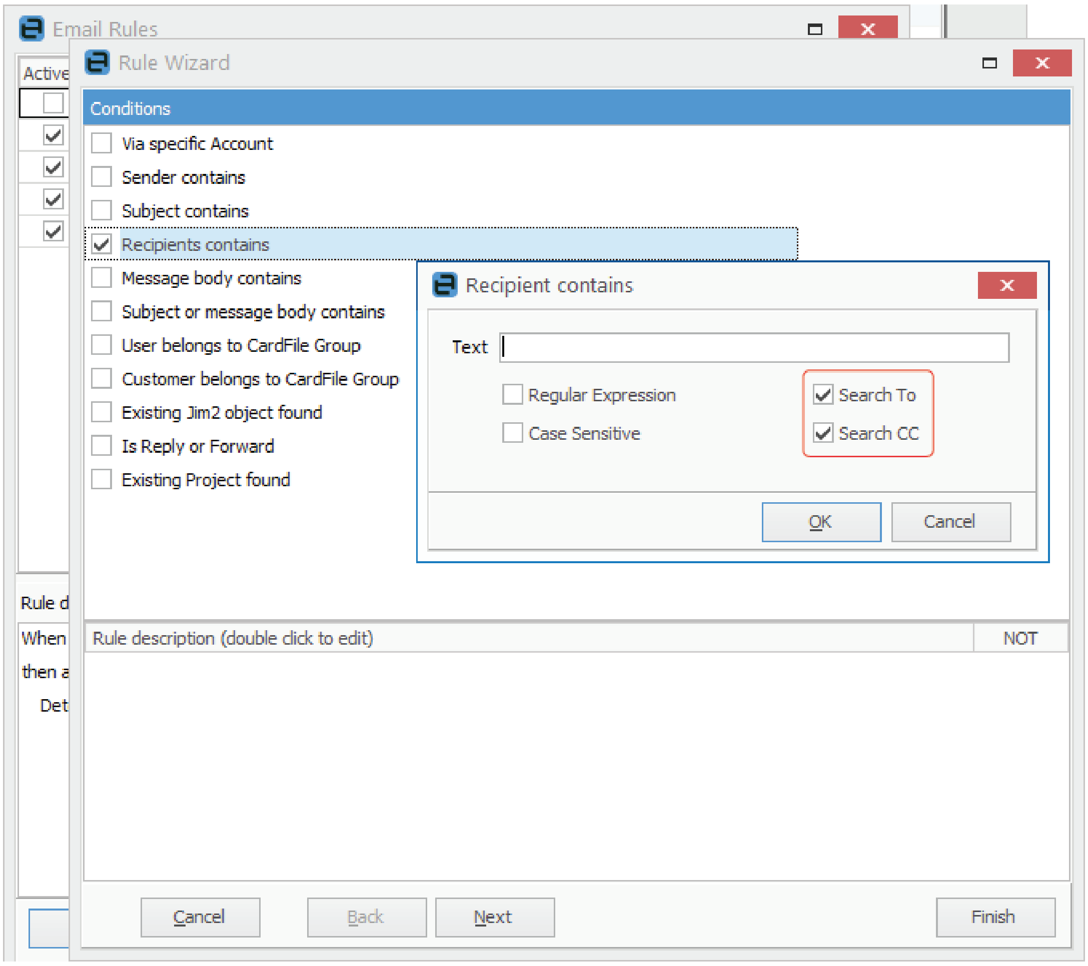
We have improved overall speed (preview is now much faster), with better handling of large emails.

Email Rules

Email Rules – Project Template support:

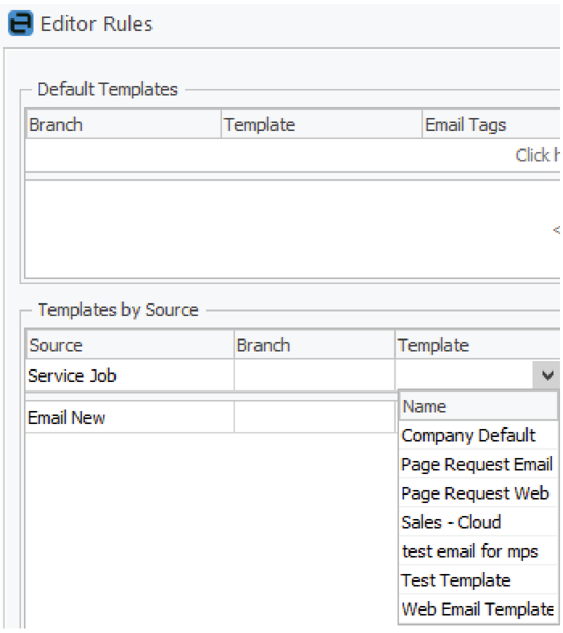


Recipient contains can be restricted to To and/or CC



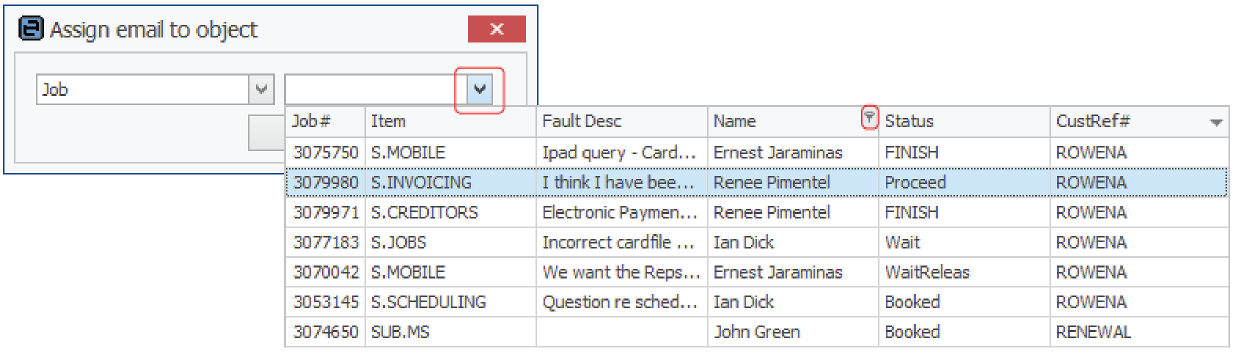
Email Editor Rules

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

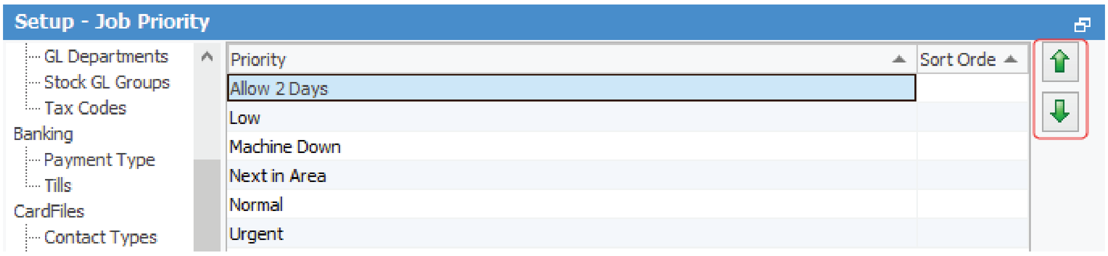
The email object tagging function now provides a filtered list of existing objects for the specific CardFile tagged to the email. This is only available when there is a Jim2 CardFile associated to the email.



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



Stock grid UI changes

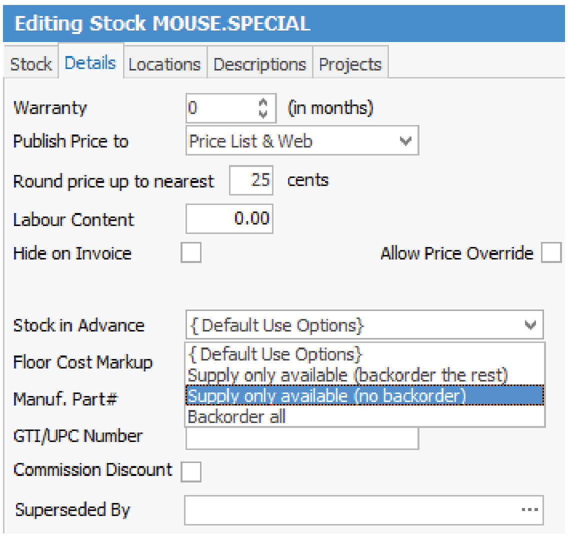
UI changes have been made to the job stock grid in an effort to increase visibility of issues with supplying stock. If any stock is back ordered, the Backordered column will be red.

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

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.



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'.

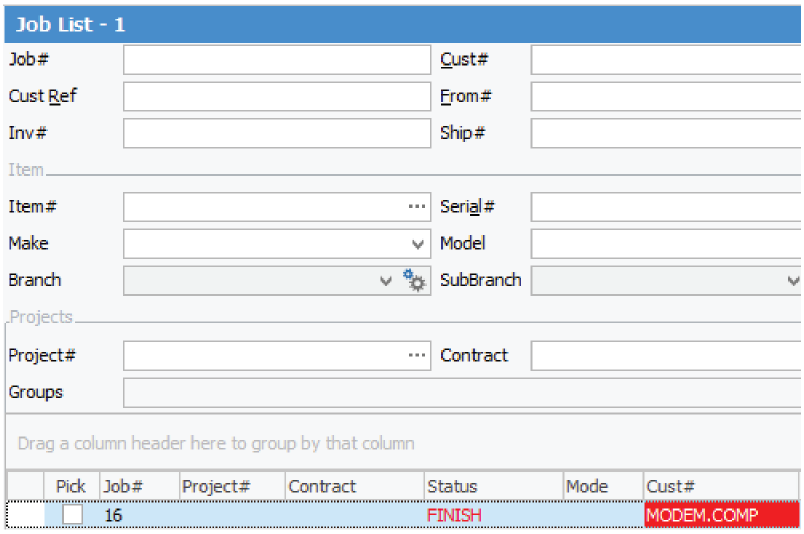
With this feature enabled, Jim2 will automatically update the Supplied and Backordered quantities, using the stock's 'Stock in Advance' setting, or if not set, falling back to the default set in Options.

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.



Purchase Orders

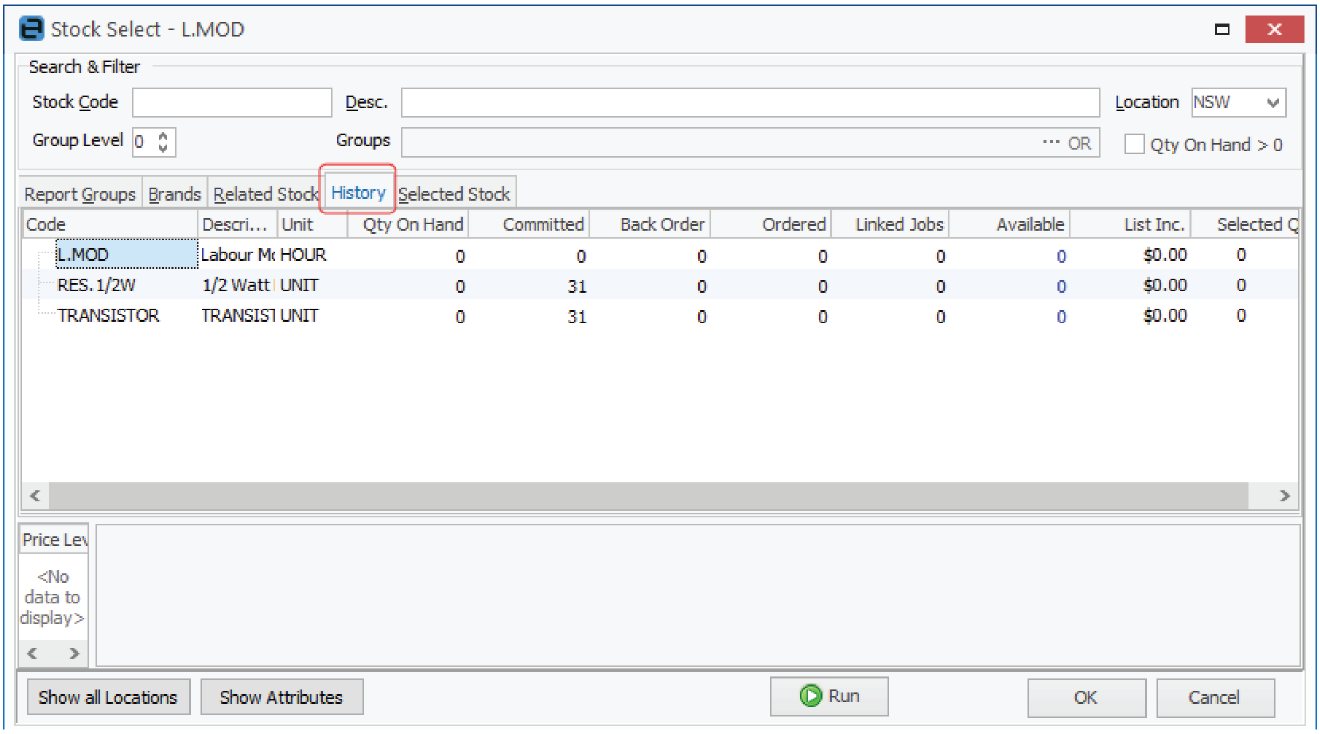
The purchase order workspace has been enhanced to include a new field to assign a user name to a purchase order. This enables you to track which user is creating the PO, and also enables users to filter a list of POs by user name.

Stock

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

Stock Select

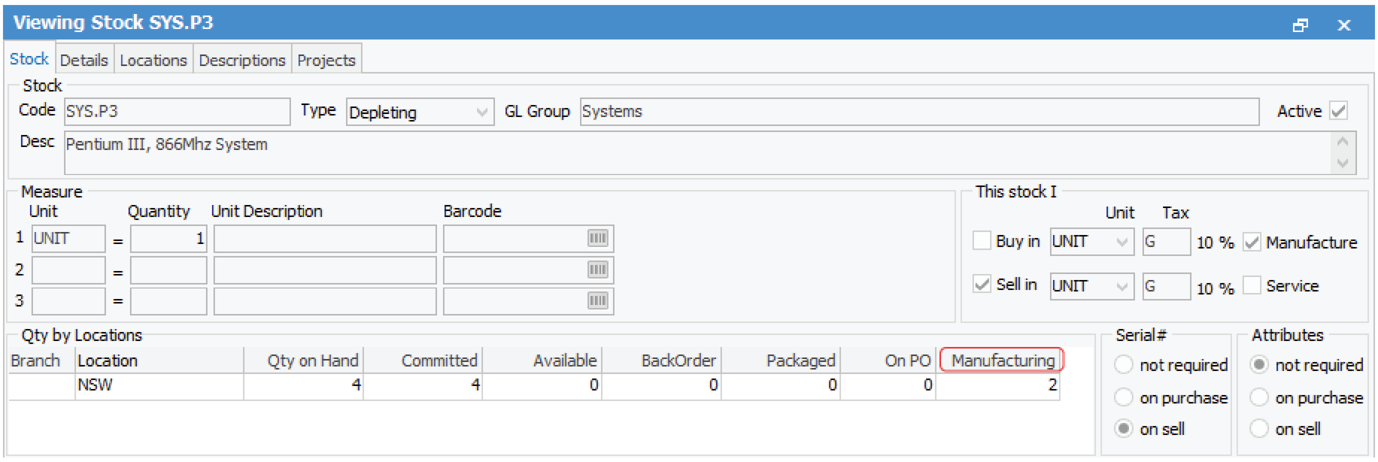
History Tab added to the stock selection screen. Within the Stock Select screen, there is now a History tab which displays all stock previously ordered by a customer. This tab displays up to 365 days of stock history.



Stock 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.



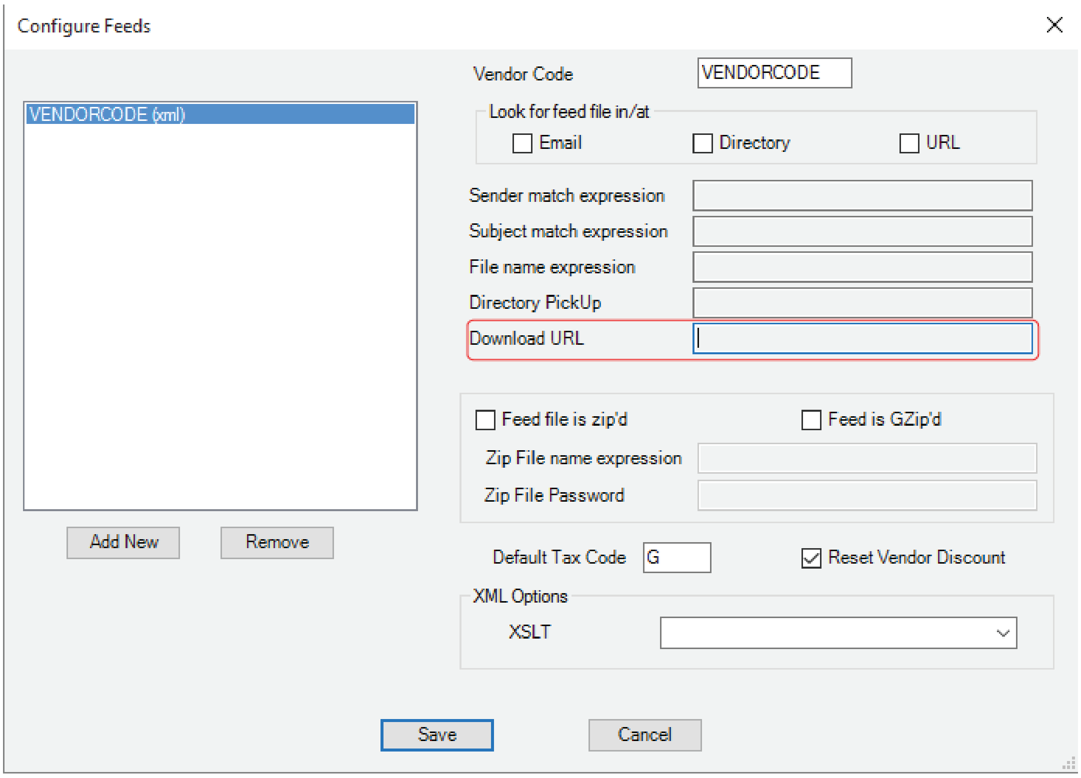
Stock Procurement will include the number of stock being manufactured when calculating order quantities.

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 upport URL downloads:



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

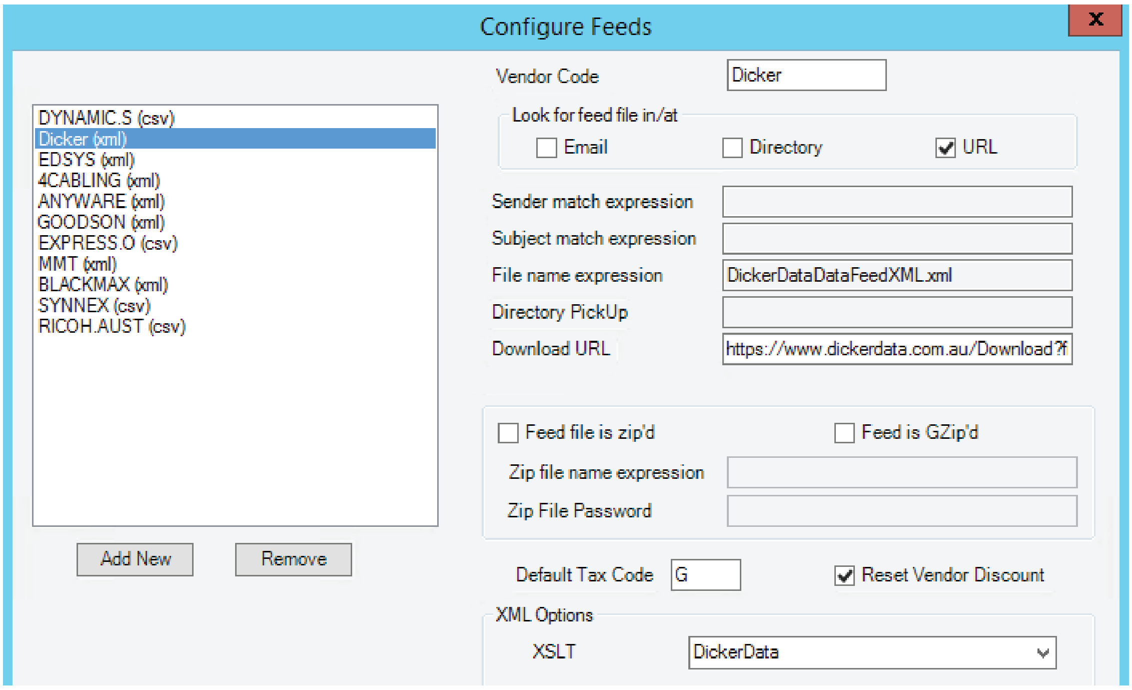
Dicker Data no longer supplies stock feeds via email due to email size restrictions, and are now sending stock feeds via URL. As this release now supports URL downloads, the Dicker Data feed is only available to customers running Jim2 v4.1, not prior Jim2 versions.

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=LEJaaaAAAAaORAbq6cEAvQiXXXXXXXXXnnnnnnnnXXXJMRaj4TNYz9RKIV5x1fCnVOi&fileName=DickerDataDataFeedXML

Example configuration:



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.

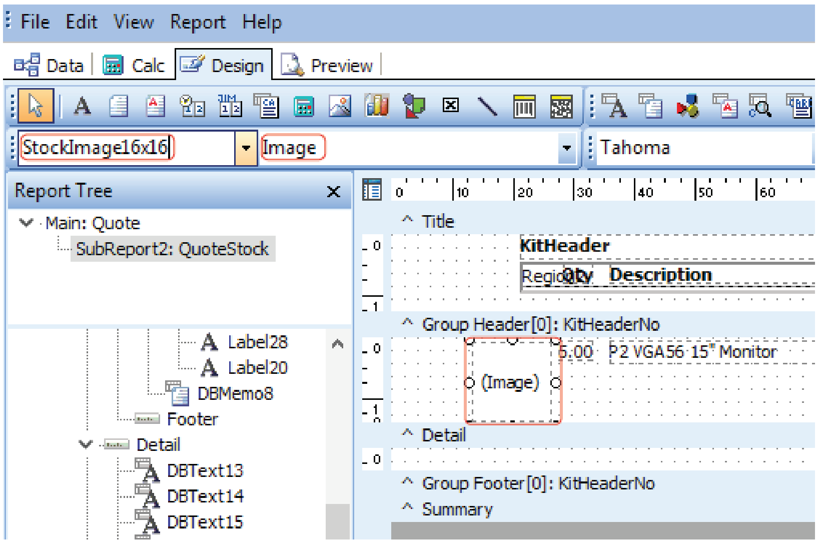
Reporting and Report Designer

Adding Images to Reports

Now just got much easier!

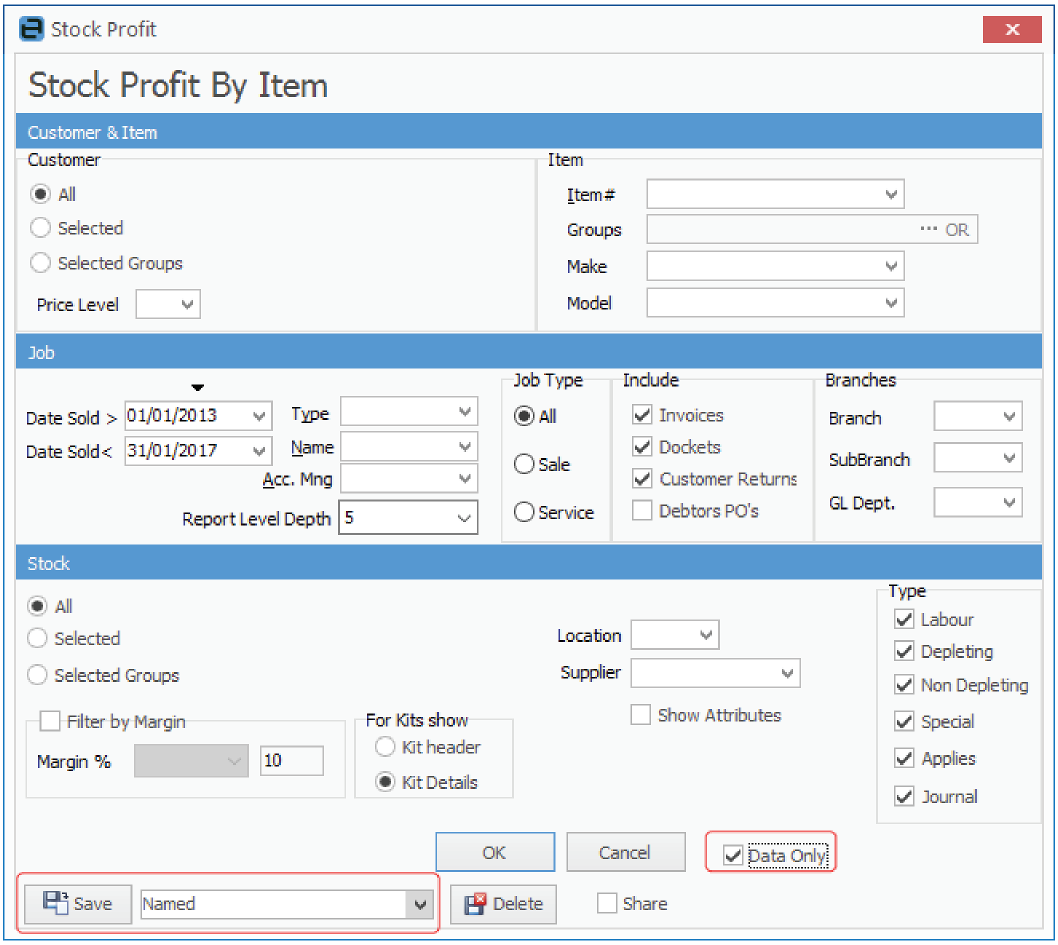
To get images that are linked to stock, or any other Jim2 object:

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.

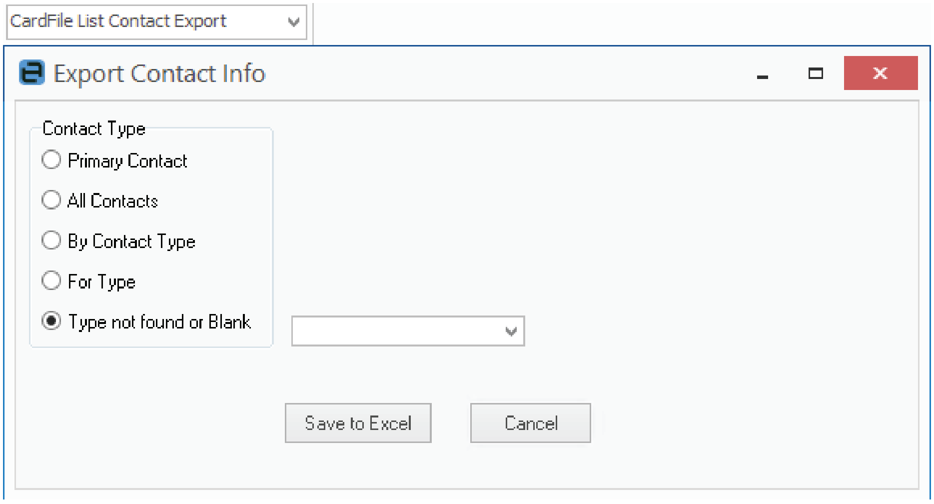


Jim2 Spreadsheet Reports

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.



Miscellaneous Enhancements

Add Labour

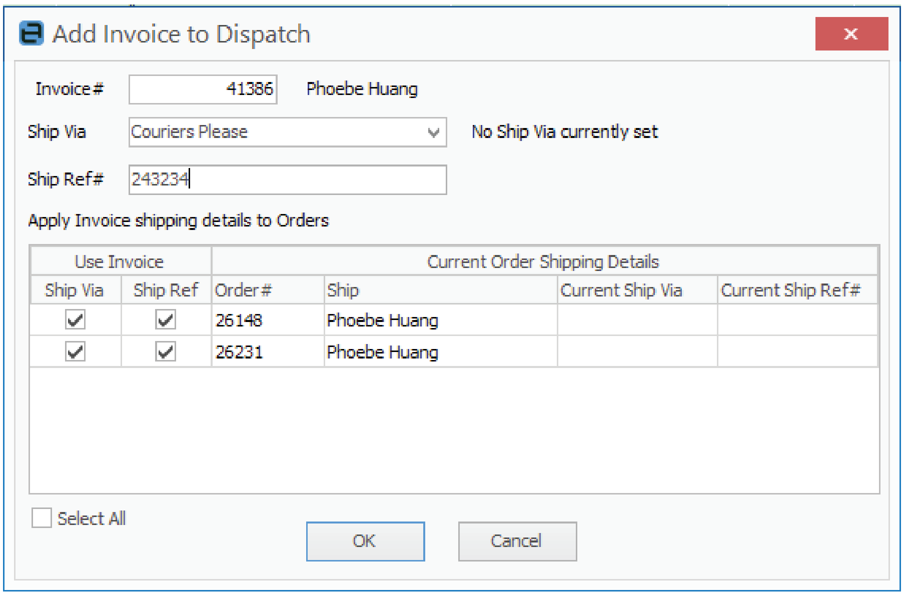
Add labour via XML is no longer supported.

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.

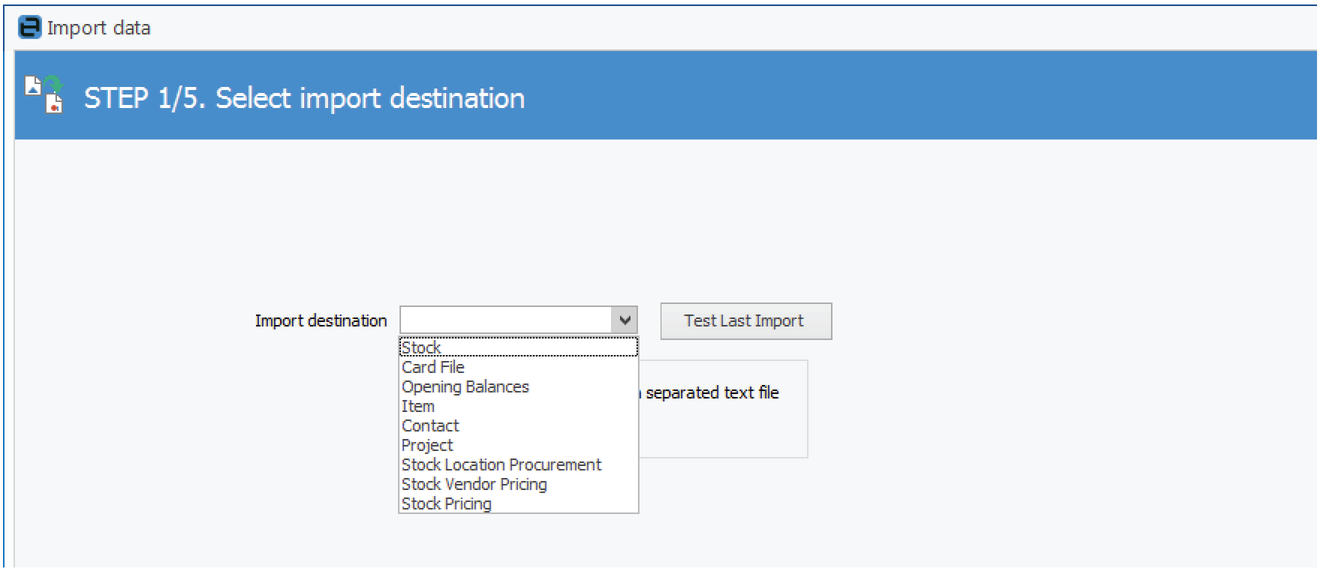
Dispatch

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



Enhancements to Data Import

There are now more choices for import destination:



Jes Notify Module (part of eBusiness Service)

Updated comment macro variables for email subject and body templates.

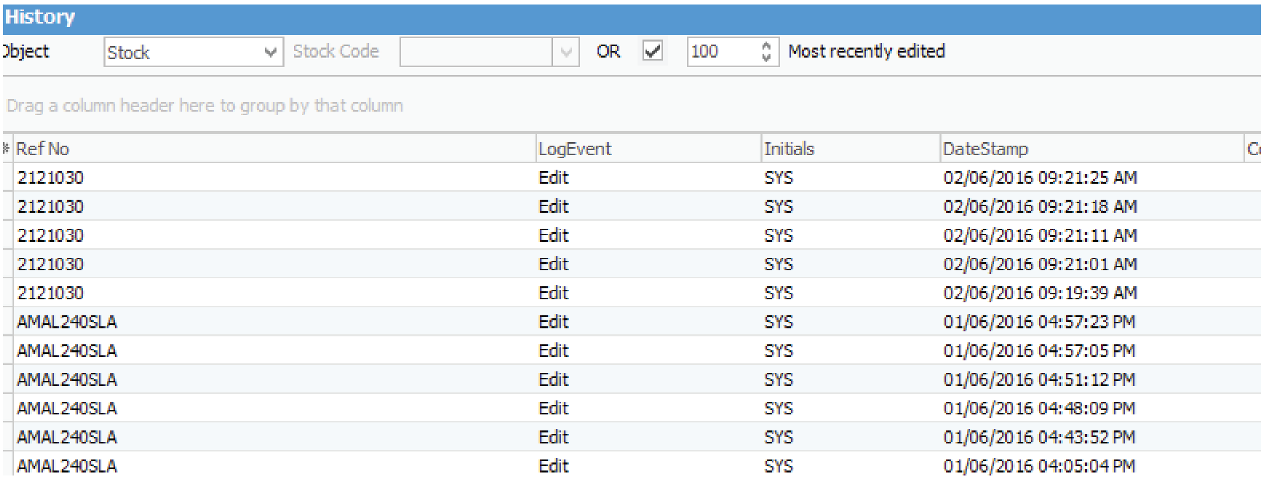
The Jes notify module enables job-related email alerts to be generated based on Job Status Due, Due Date, Job Added, and Job Edited.

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



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.

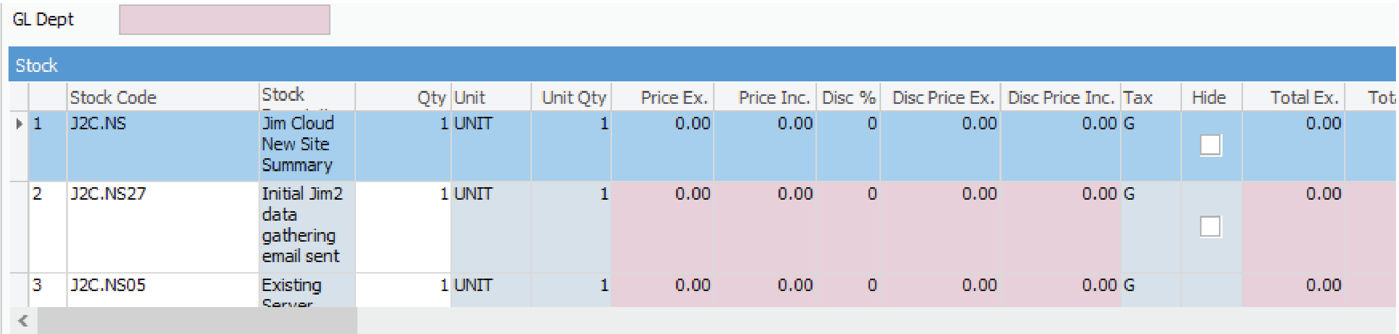
Managed Services Edition Enhancements

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.

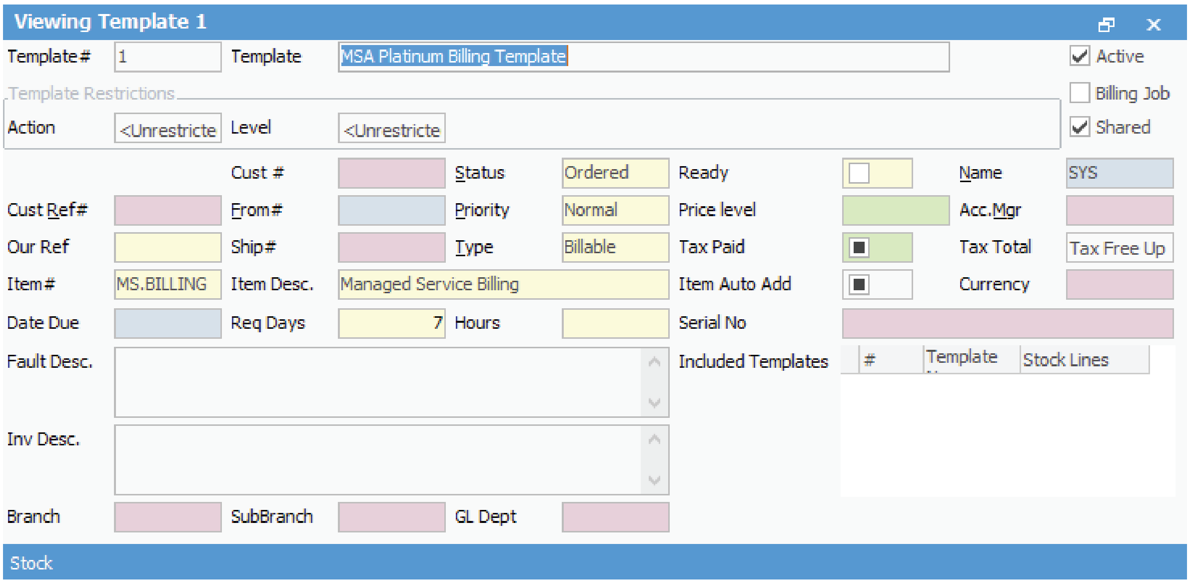


The kit capability is made possible as part of the new Project Template functionality.

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.



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.

ne	Item	Next Bill Source	Billed	On Day	Next Bill	New Template Includes	Override?	Amount Ex.
:JC.	SUB.JC.MS	Next Bill Settings on Project	Monthly	1st of the month	01/03/2017	0 Templates ···	Normal inheritance	$739.00
:tup	S.CLOUD.NS	Value	Manual			1 Template ···	Normal inheritance	$0.00
g & Drop / Local File Access	S.CLOUD.FILES	Value	Manual			1 Template ···	Normal inheritance	$0.00
ivation	S.CLOUD.OFFICE	Value	Manual			1 Template ···	Normal inheritance	$0.00
i Support Request	S.CLOUD	Value	Manual			1 Template ···	Normal inheritance	$0.00
Session Jim2	S.CLOUD.MS	Value	Manual			1 Template ···	Normal inheritance	$0.00
Locked	S.CLOUD.RS	Value	Manual			1 Template ···	Normal inheritance	$0.00
(Add/Edit/Delete)	S.CLOUD.NU	Value	Manual			1 Template ···	Normal inheritance	$0.00

Project Templates in detail

The following section will take you through the concepts and setups associated with the new Project Template functionality. This applies to new and upgrading clients who are licensed to use the Jim2 Managed Services and Managed Print Services Editions.

Note: No change to MPS billing has been made in this release.

Note: Please take the time to read this section prior to attempting to set up and use this functionality.

Project templates are essentially 'Jim2 job templates' that can be used to apply jobs with default values and stock lines.

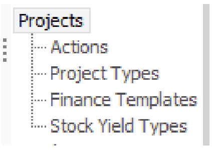
Project templates can create completely new jobs, or update existing jobs. They can be used for
- Recurring Scheduled Job creation
- Email Job creation rules
- Via dynamic menus within a Project list, Project, or Project-linked job.

Jim2 Projects now requires at least one Billing template to be linked to a Project to generate a billing job. Billing templates replace the default Stock tab Billing function within a project.

Go to **Tools > Options > Project: 'Display Default Stock (Legacy)'** to show or hide the old Default Stock tab.

Setup

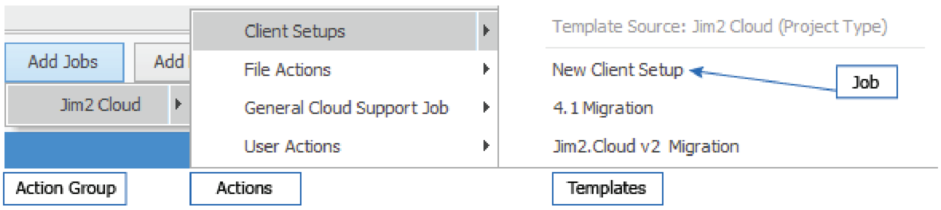
The Project Setups (**Tools > Setups > Projects > Actions)** section in Jim2 now has a new 'Actions' option added to the tree:



Getting Started with Actions and Project Templates

Define your Actions & Action Groups

In previous versions of Jim2, the ability to create jobs from projects was hardcoded. Clients could create Billing, Onsite, Workshop and Consumables jobs from within a project. This hardcoding has been removed, and the concept of Project **Actions** has been introduced. Once configured, the project job creation menus are dynamically displayed.



Actions – Project templates are associated to Actions.
Action Groups – Actions can be grouped together within Action Groups, and their use is optional.

Once templates are associated to Actions and the Actions are associated to a 'Project Type', they are ready for use by any Project configured with that Project Type.

Default actions now included in Jim2 are:

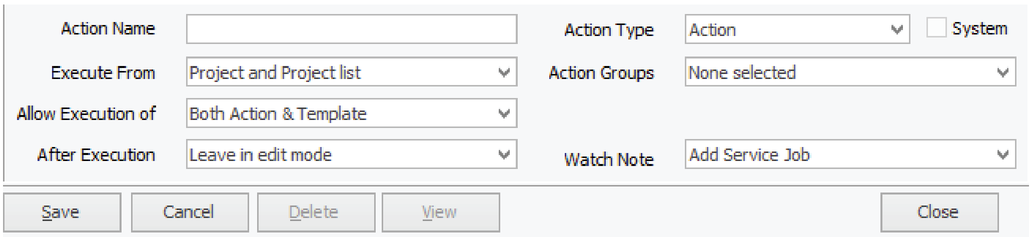
- Billing
- Onsite
- Workshop
- Consumable (With MPS Licenced database)
- Service

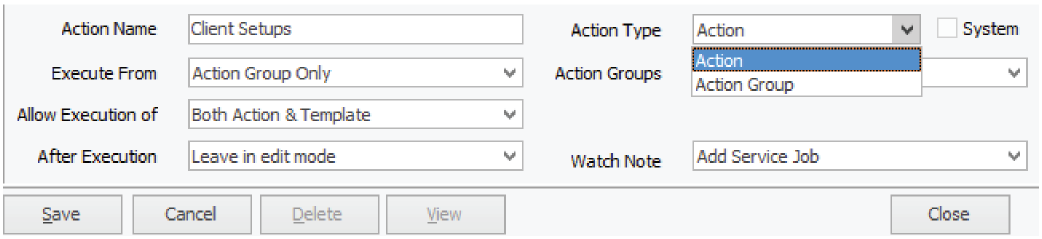
Step 1. Creating New Actions and Action Groups when required

Tools > Setups > Projects > Actions

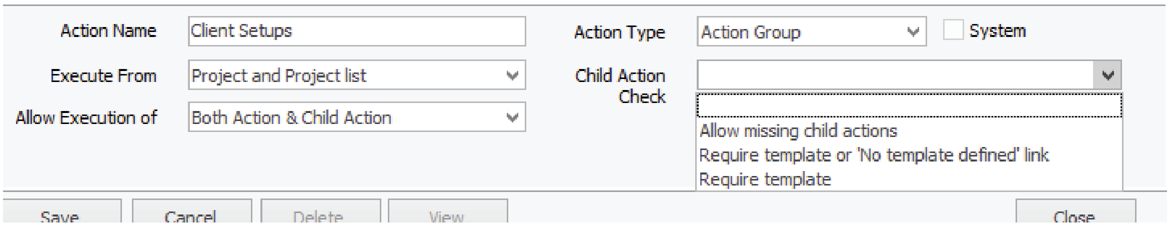
Action Name	Action Type	After Execution	Watch Note	Execute From	Allow Execu	Action Grou	Syste
Billing	Action	Leave in edit mod		Project and Project list	Both Actior		☑
Client Setups	Action	Leave in edit mod	Add Service Job	Action Group Only	Both Actior	Jim2 Cloud	☐
Consumable	Action	Leave in edit mod		Project only	Both Actior		☐
Jim2 Cloud	Action Group			Project and Project list	Both Actior		☐
Onsite	Action	Leave in edit mod	Add Service Job	Project only	Both Actior		☐
Remote	Action	Leave in edit mod		Project only	Both Actior		☐
Service	Action	Leave in edit mod		Project only	Both Actior		☐
Workshop	Action	Leave in edit mod		Project only	Both Actior		☐

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

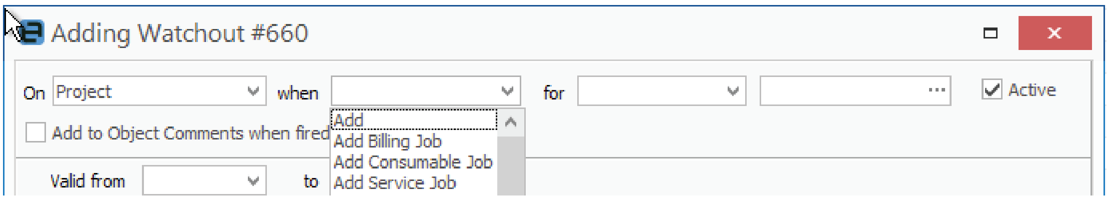




Changing the Action Type to 'Action Group' will refresh the screen to show you the appropriate setups for an Action Group:



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



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

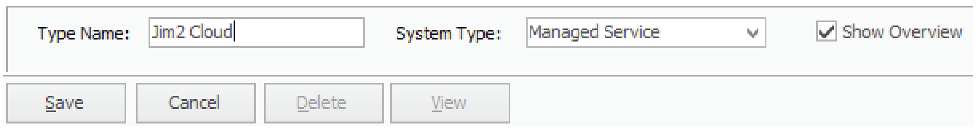
Execute From: Where the Action Group is configured to display within Jim2.
- **Disabled**: The action group will no longer be available for use.
- **Project & Project list**: Whether the Action Group is run/displayed from a Project list and a Project.
- **Project Only**: When the Action Group can only 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

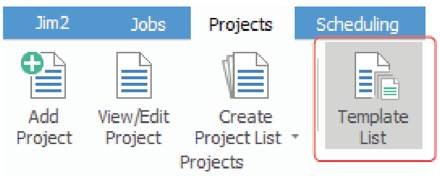
In the example below we have added the Project Type 'Jim2.Cloud'.

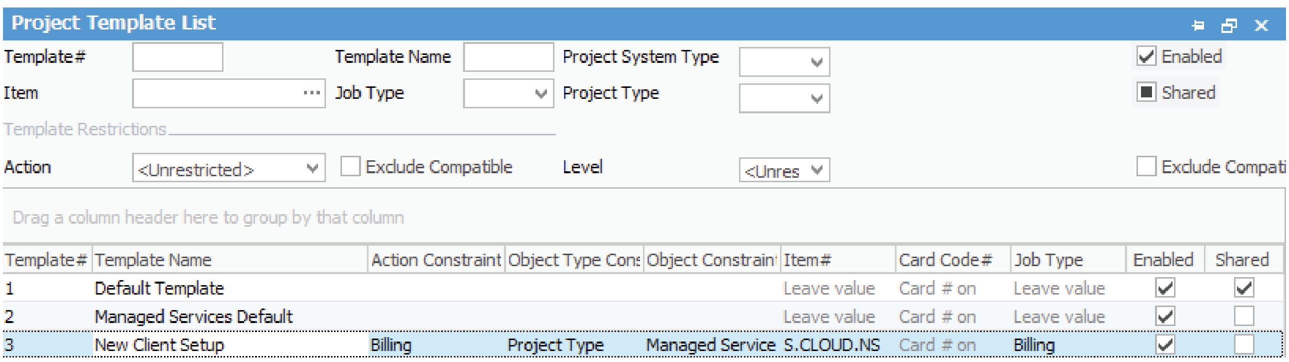


All Managed Service Project Types should have the System Type of 'Managed Service' selected.

Step 3. Create Project Templates

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





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

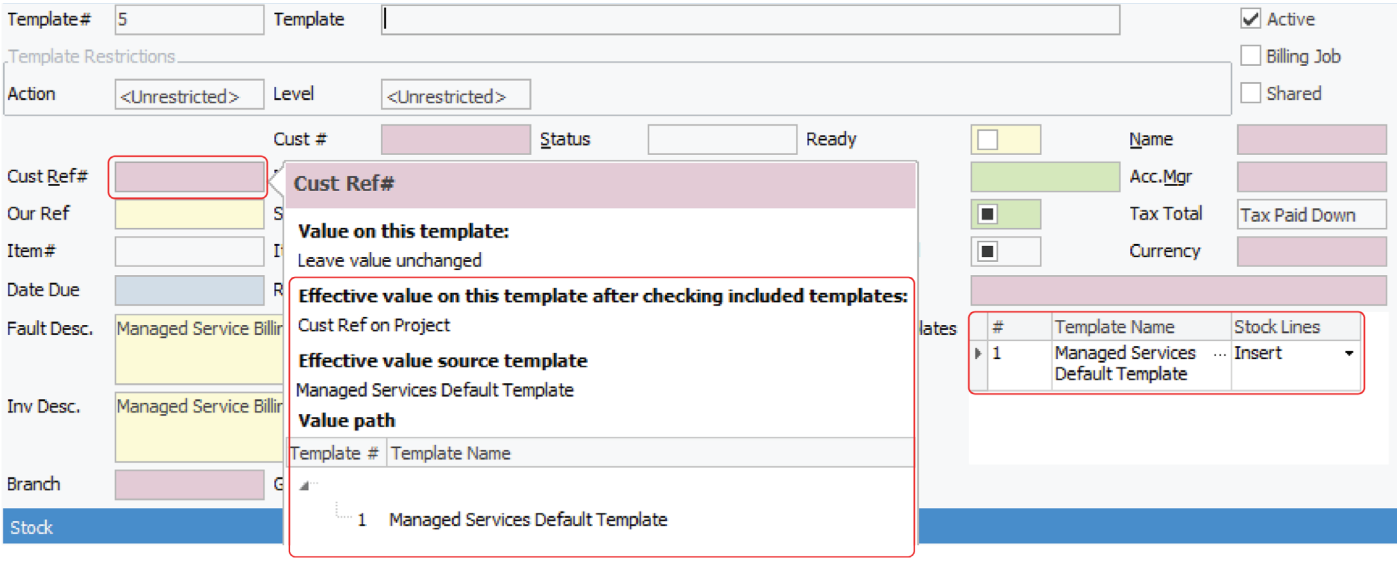
When upgrading, existing Jim2 users that already use Projects to manage contract billing will see several Billing templates that have been created from the existing Default Stock tab lines in Projects.

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.

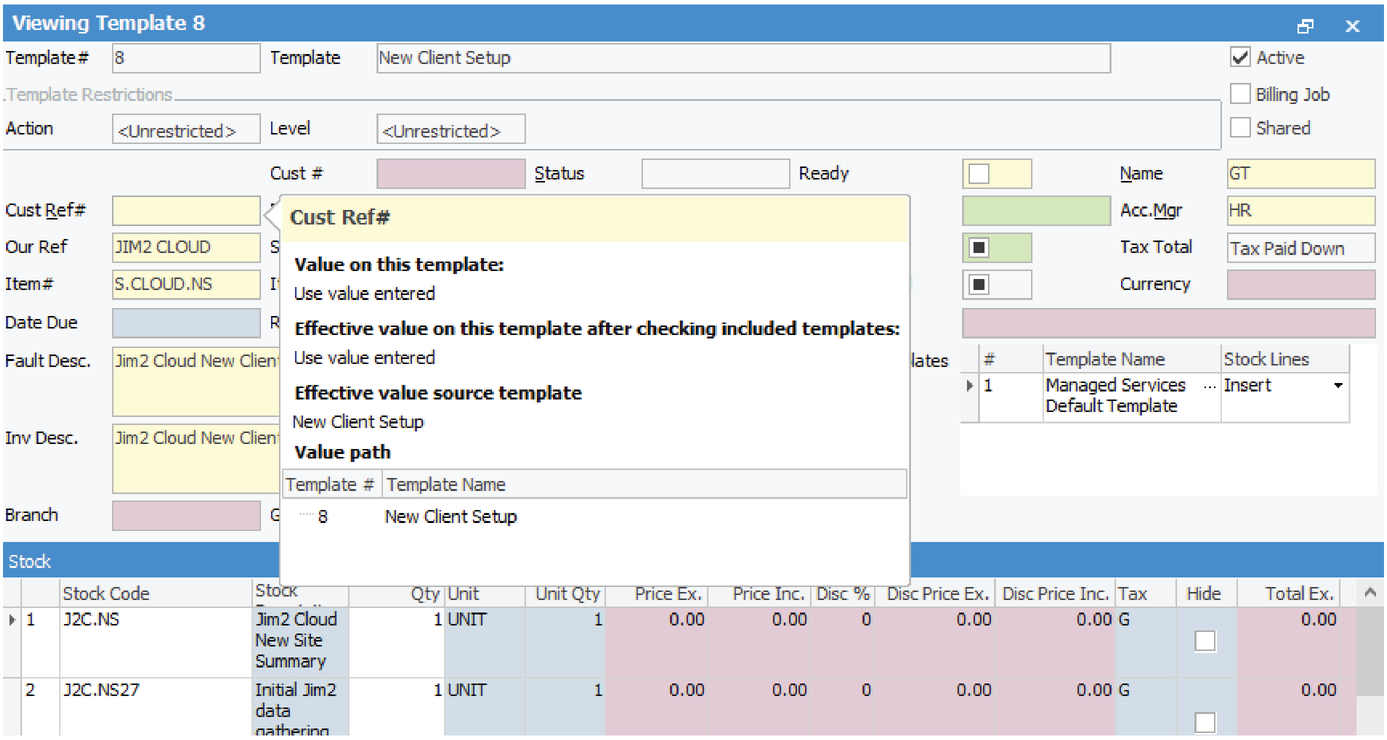


As in the example above, you will see that fields have different colour shading, which is designed to help you understand where the values in a template are being derived from. You can also see we have an included Managed Services Default template (more detail on this in a later section).

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.



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

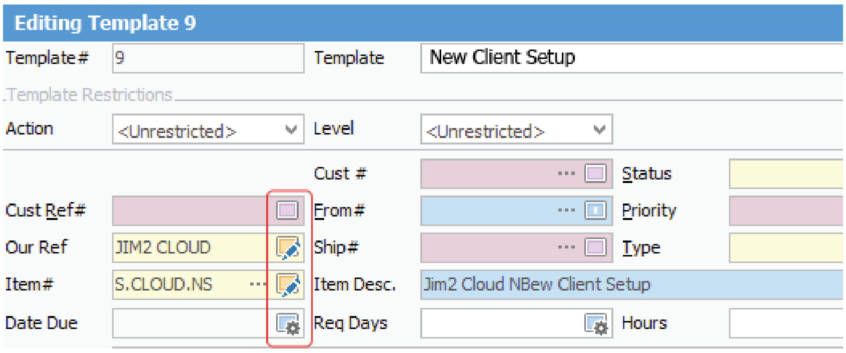
See over for explanation of background colours.

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:



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.

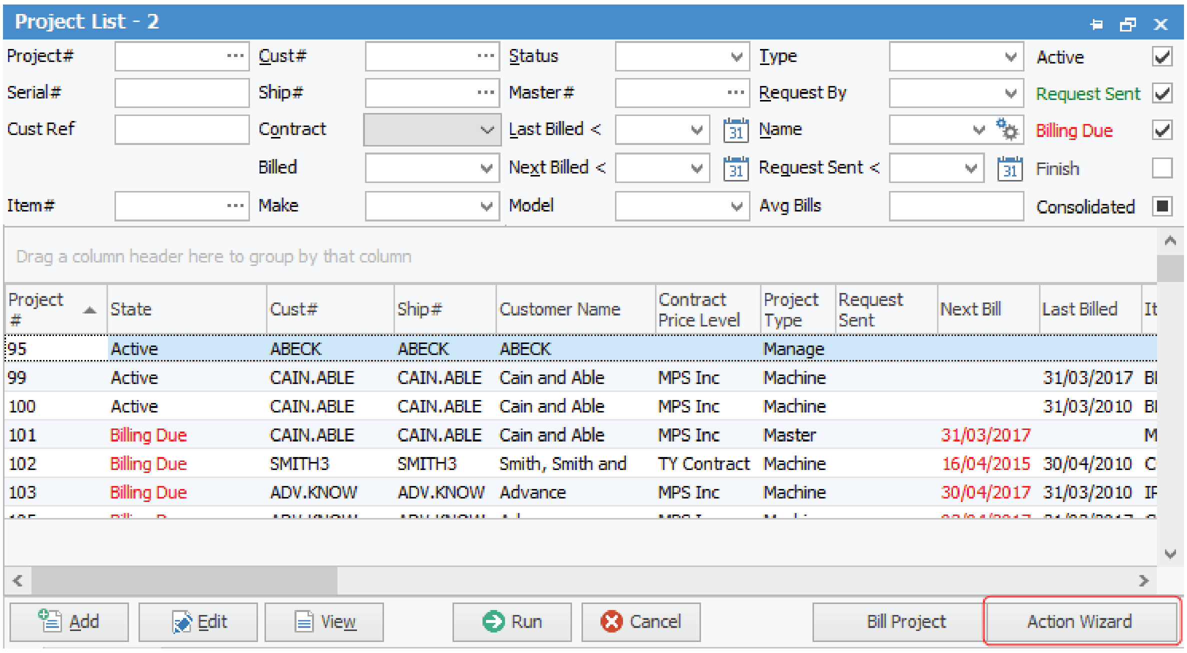
- **Project** – can only be used on a specified Project.
- **Project Type** – can only be used on a specified Project Type.
- **Project System Type** – very high level, ie. can only be used for Managed Service Type and not MPS (Machine) types.

Step 4. Template Rules and the Action Wizard

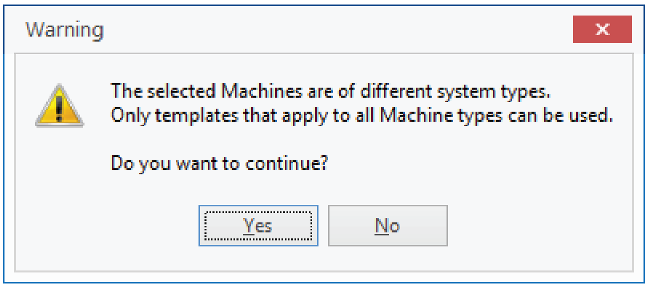
The Action Wizard is designed to help you through the process of creating templates and assigning templates to Actions at multiple levels.

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.



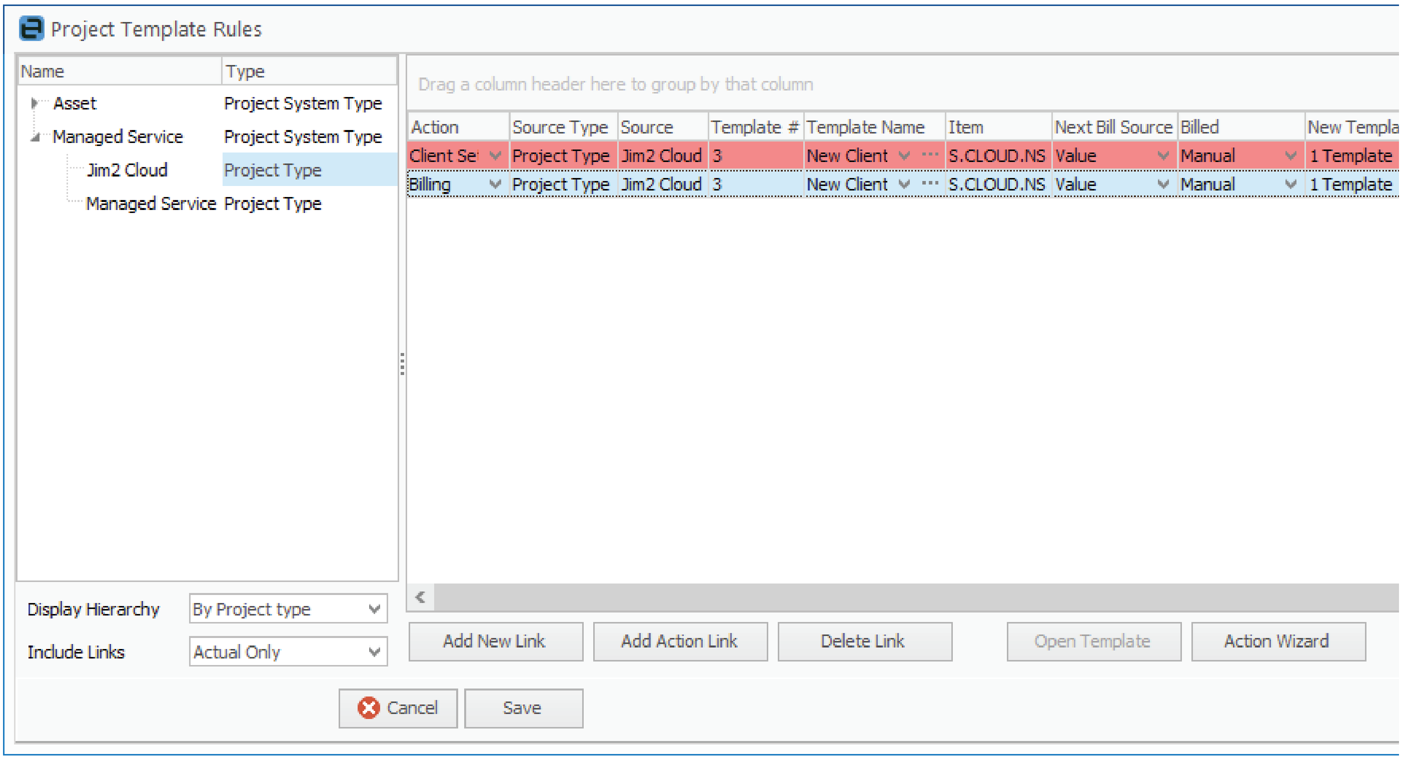
* Template restrictions may prevent some associations from being applied.



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:

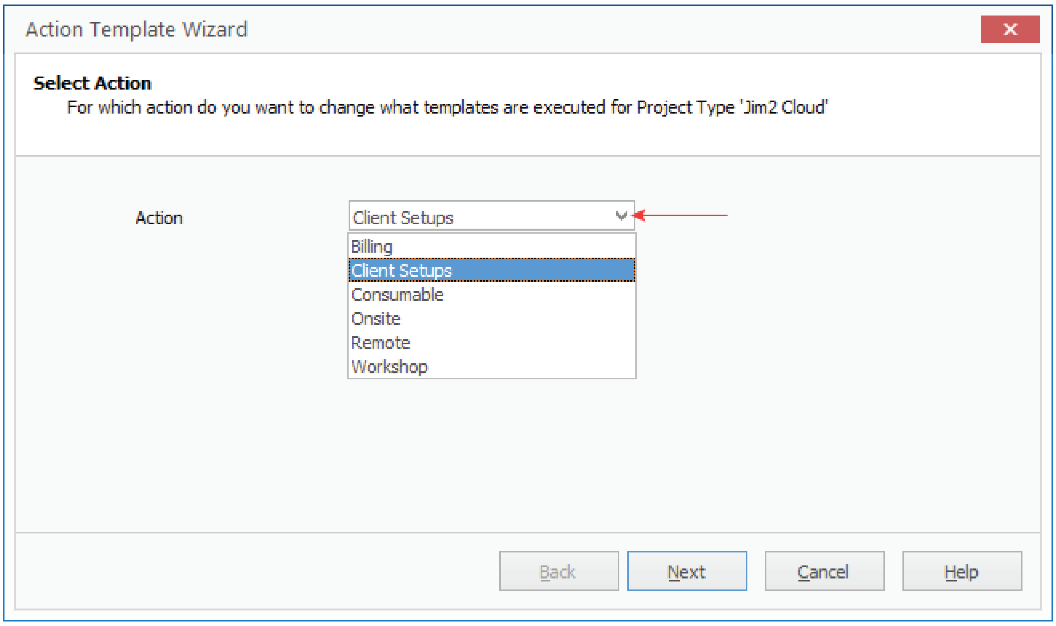


The left-hand pane of the window provides a hierarchical view of Project Type and Action associations, and can be changed to your preference of 'By Project Type', 'By Action', or 'By Action Group'.

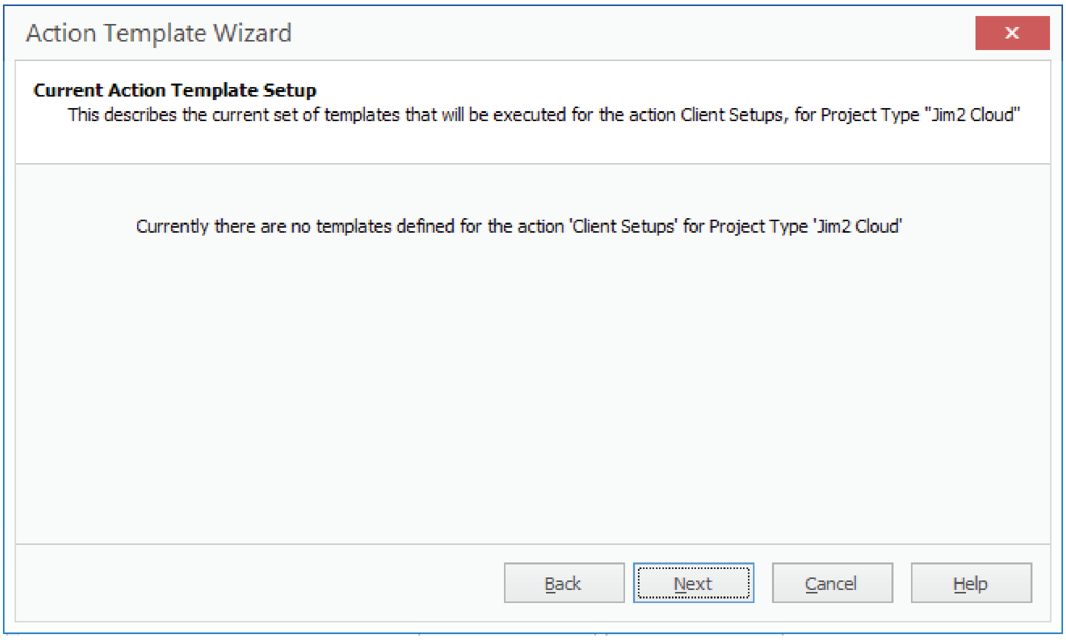
Selecting an Action or Project Type will display a list of the associated templates in the body of the Project Template Rules window.

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'.

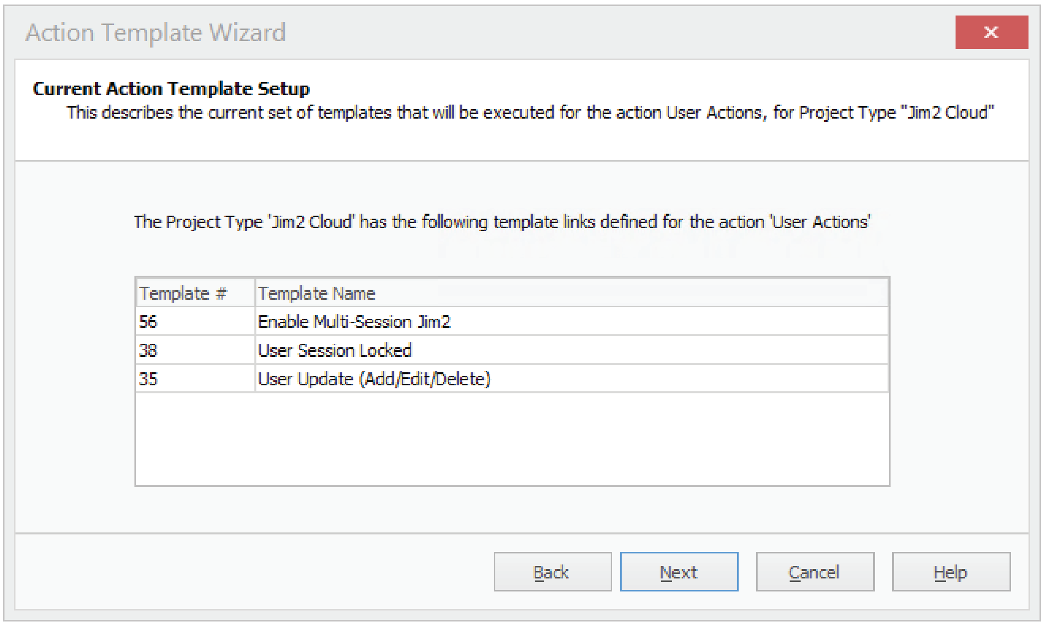


5. The 'Current Template Setup' window is now displayed. As we have no existing templates associated you can simply select 'Next'.

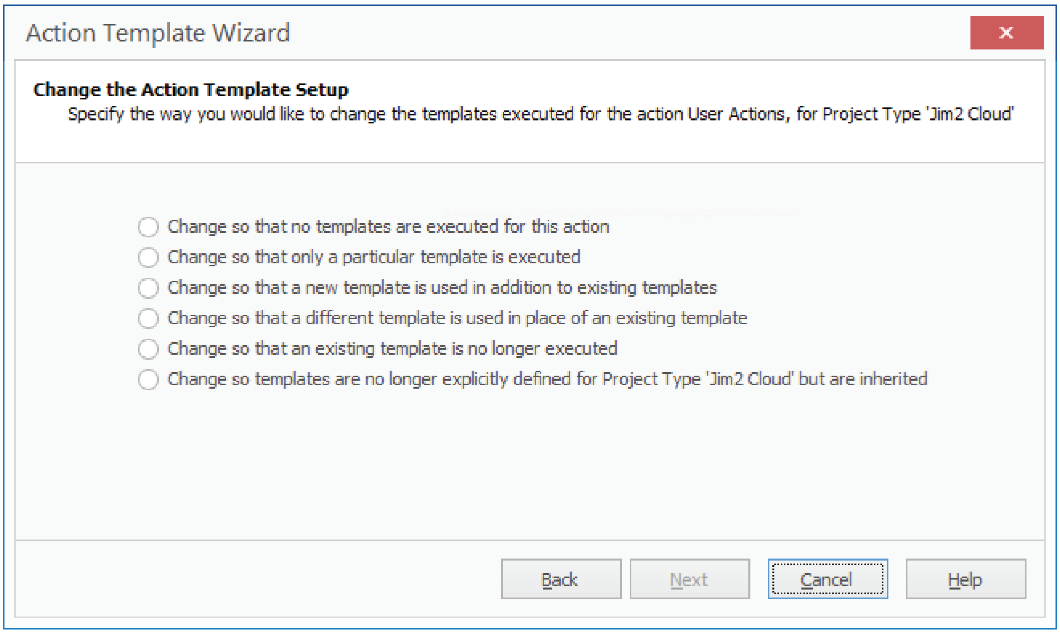


****If the action already had templates assigned to it you would see a different window where the existing templates are displayed as per below:**

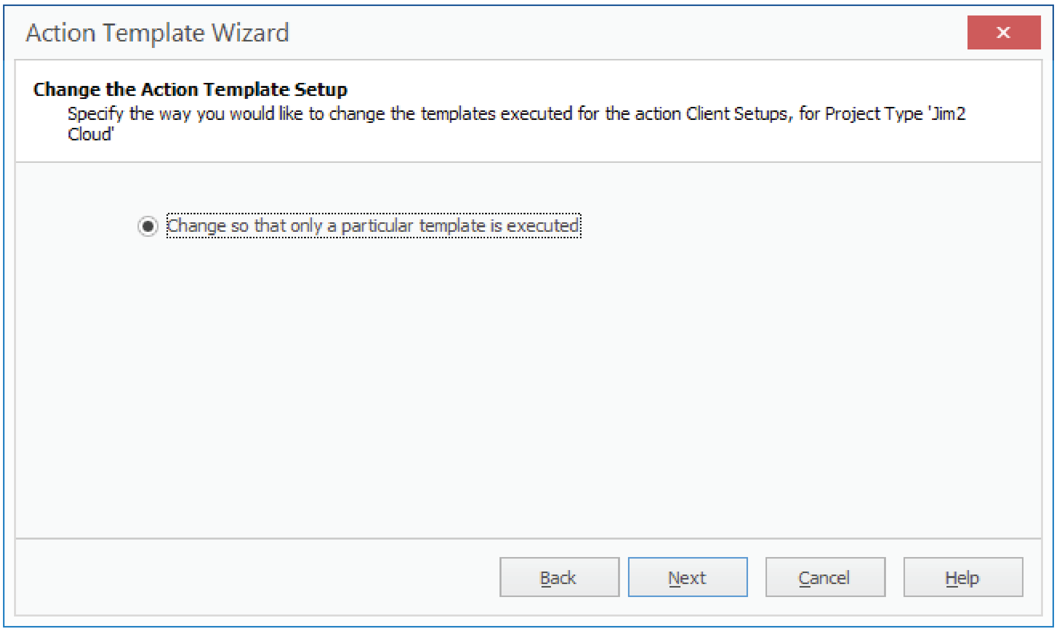
6. Selecting ‘Next’ on this screen will give you some self-explanatory choices as to how you wish to handle the template associations.



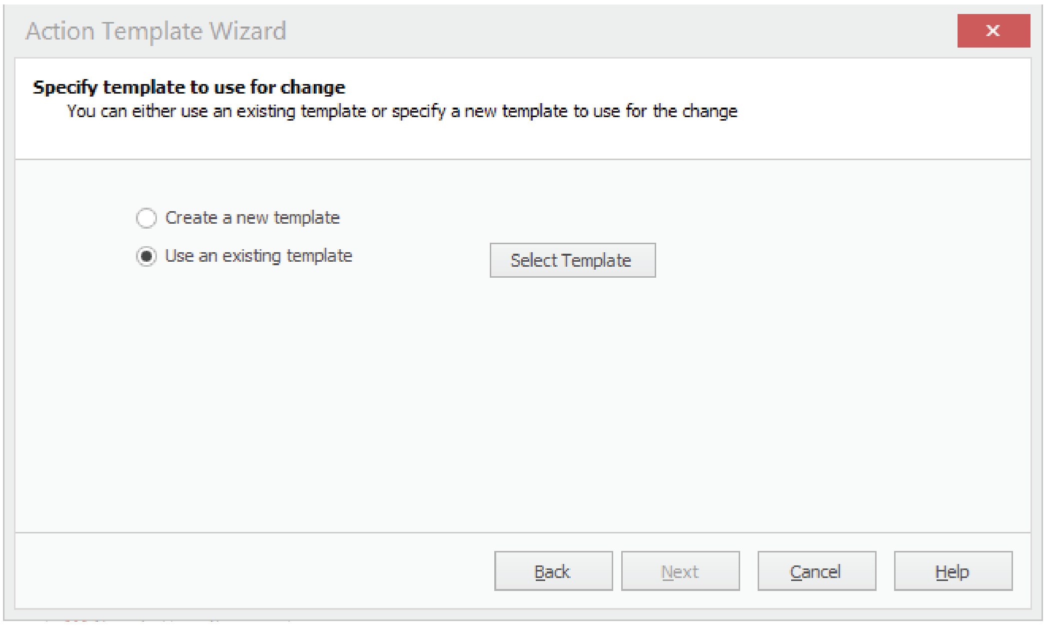
7. After selecting ‘Next’, where no templates are associated to the Client Setups:



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

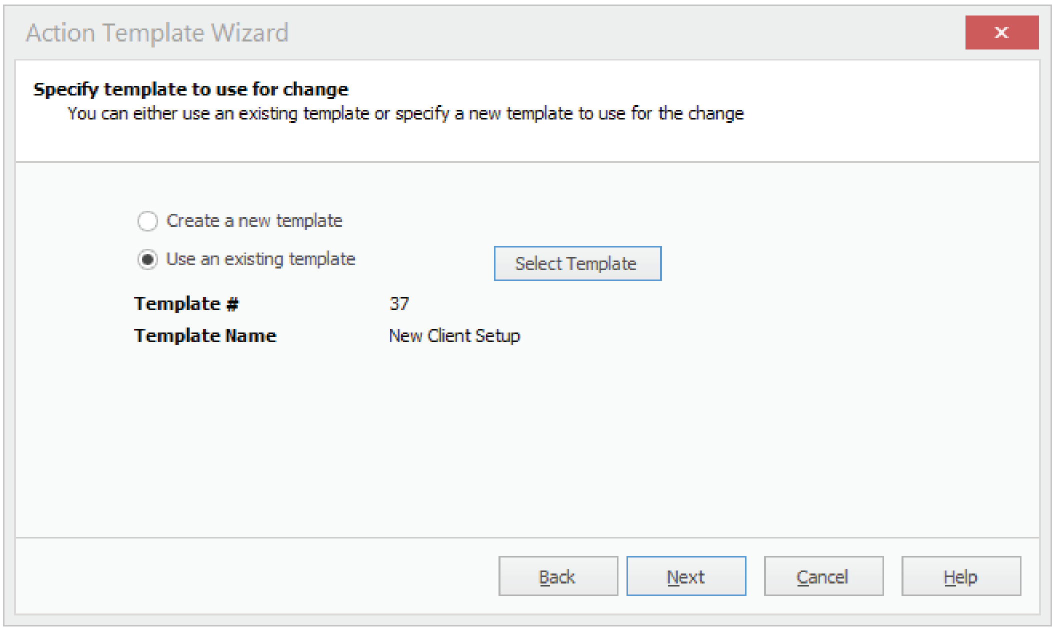


The 'Specify template to use for change' window is displayed:

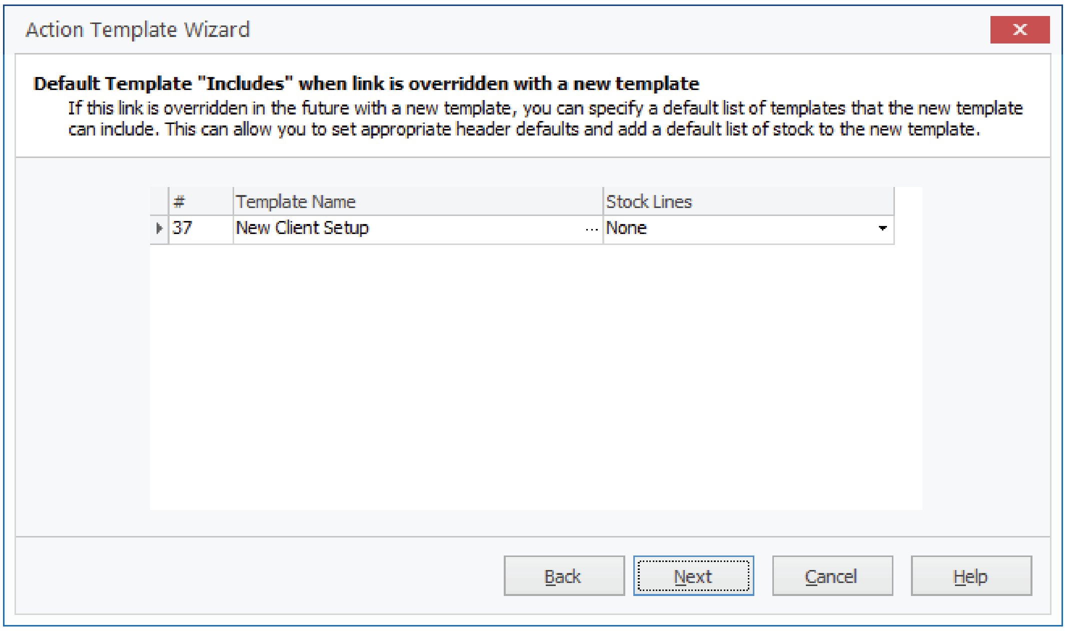


Here you can also create a new template. For this example, choose the 'Select Template' button to be presented with the 'Select Project Template' window.

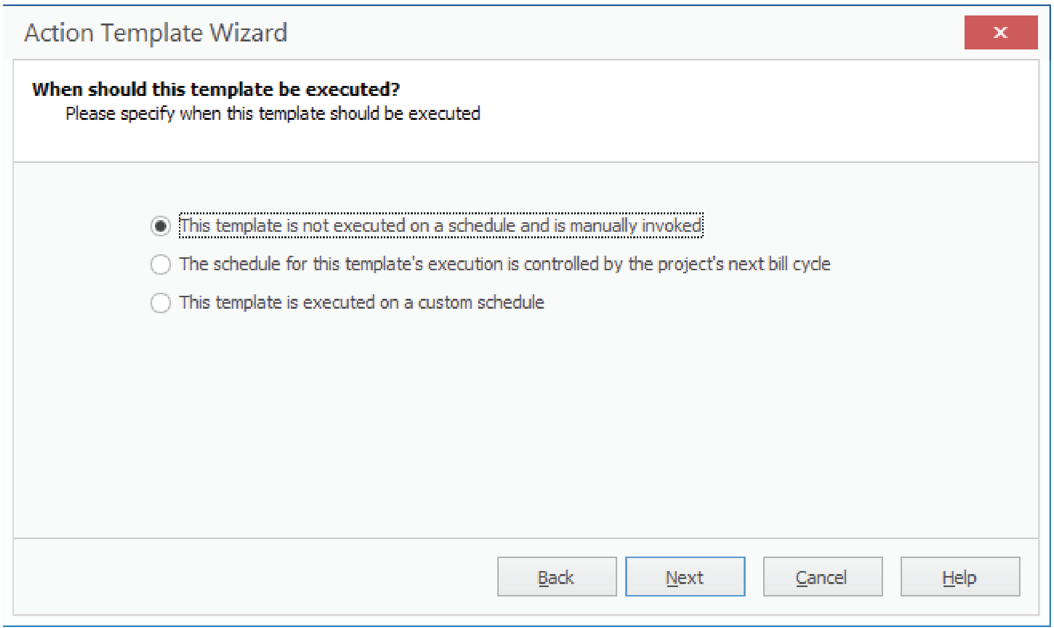
It is worth getting familiar with this screen as it is used often. Scroll or search for the template 'New Client Setups', select it and the select 'OK'.



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

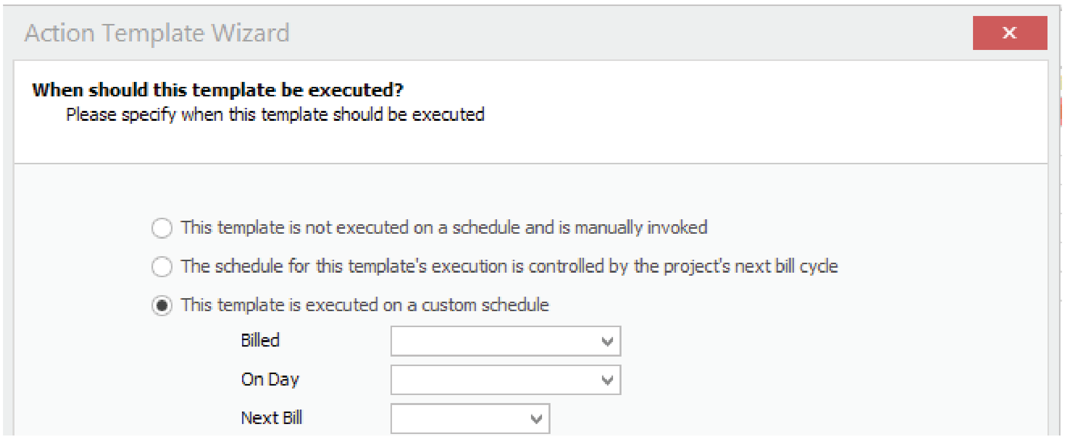


Once you've made your choice, click **Next**. The 'When should this template be executed' window is displayed:

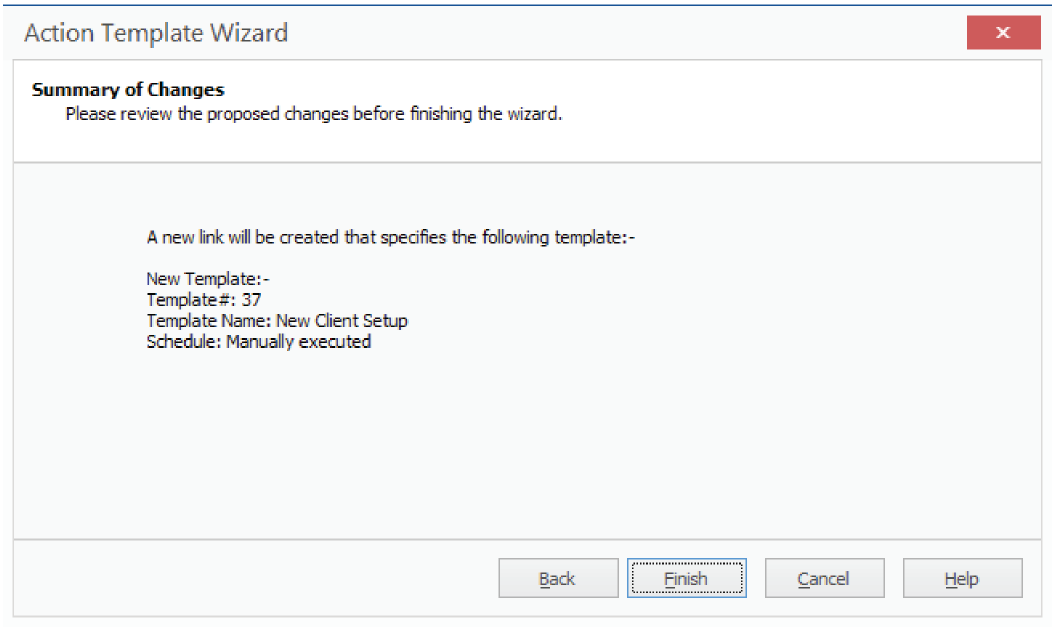


Here, you have the option to set a scheduling option. For non-billing templates, the option is generally the first, which is Manual, as per the image above.

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.

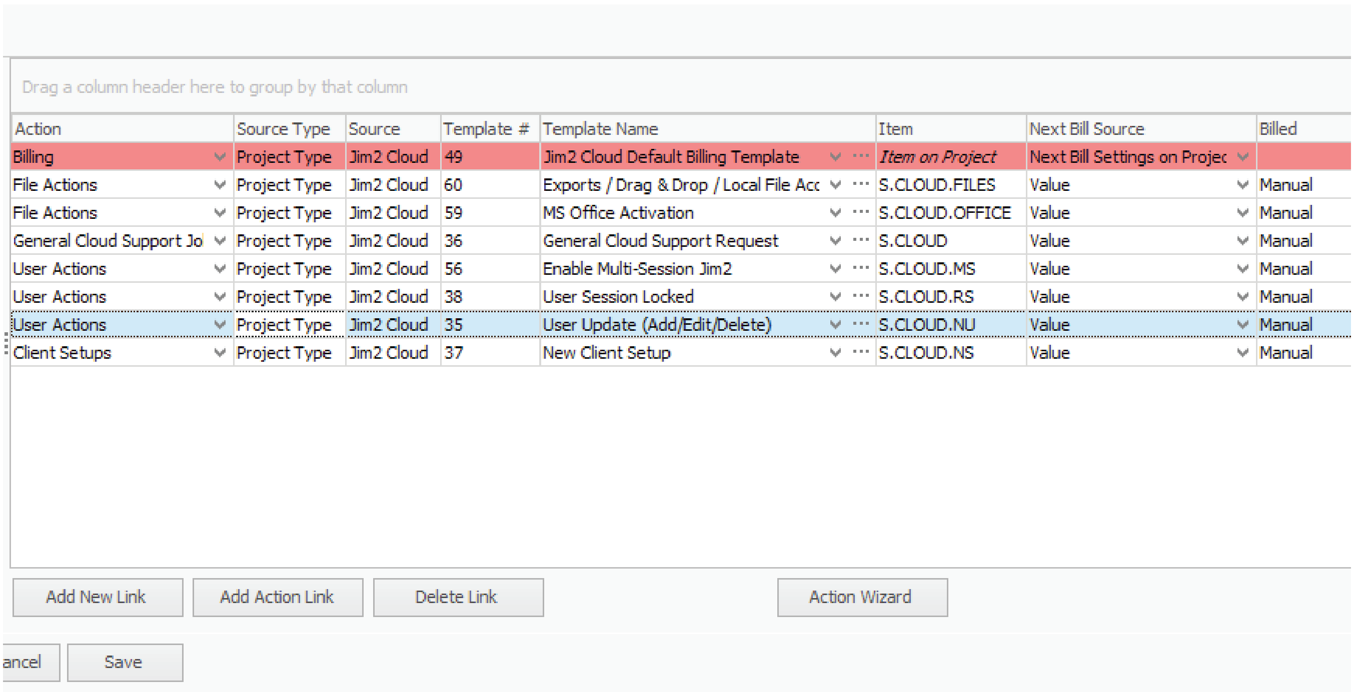


Select 'Next' to continue with the Manual option selected.



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

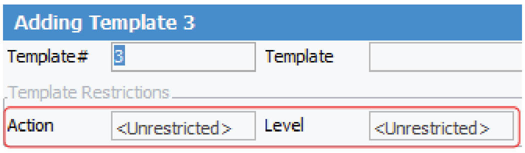
After selecting 'Finish', you will be brought back to the Project Template Rules:



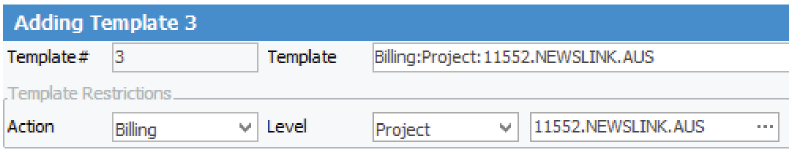
As above, you can see the new association, and you **must** then select 'Save' to finalise the update to the rules.

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'.



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



Template restriction setups:

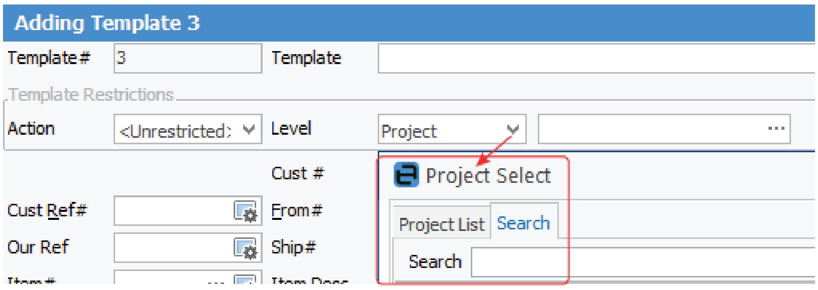
Action – select an applicable action, and the template can only ever be associated to the action specified.

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

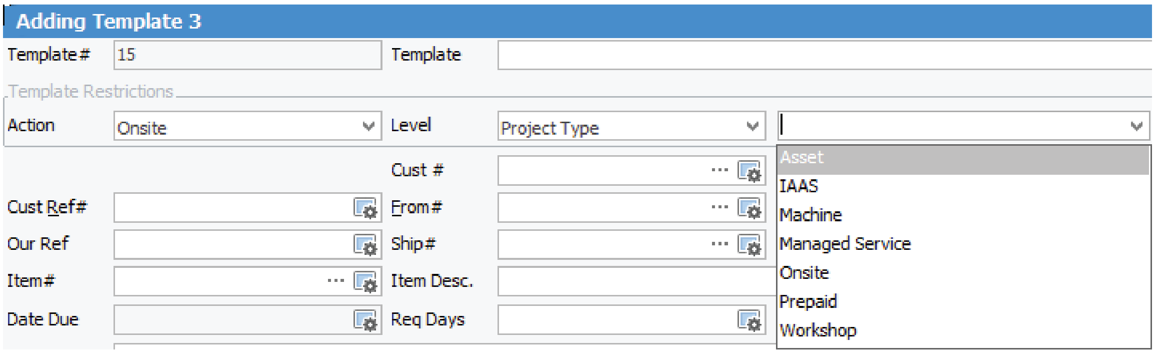
1. **Project** – set to link the project directly to a single project only.
2. **Project Type** – set so the template can only be used by projects of the specified Project Type.
3. **Project System Type** – set so the template can only be used by projects of the specified Project System Type.

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

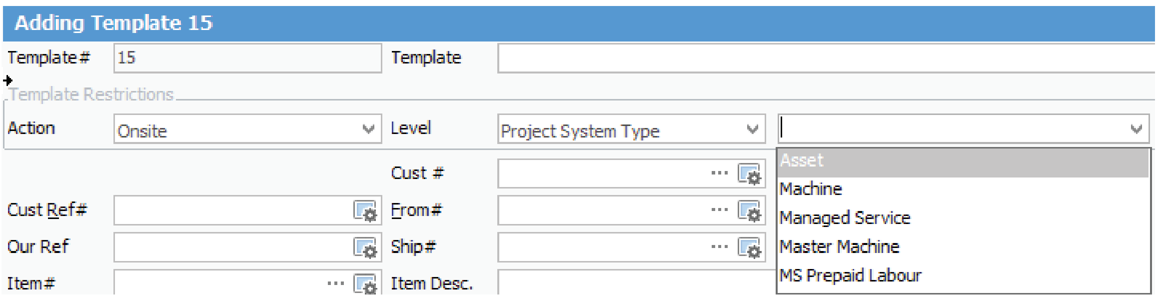
Project – prompts you to select a specific project.



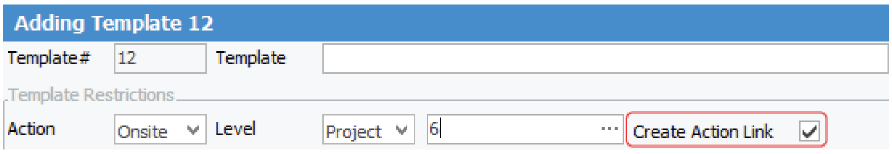
Project Type – the 'Value' box will be changed to a drop-down, where you must select a project type.



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

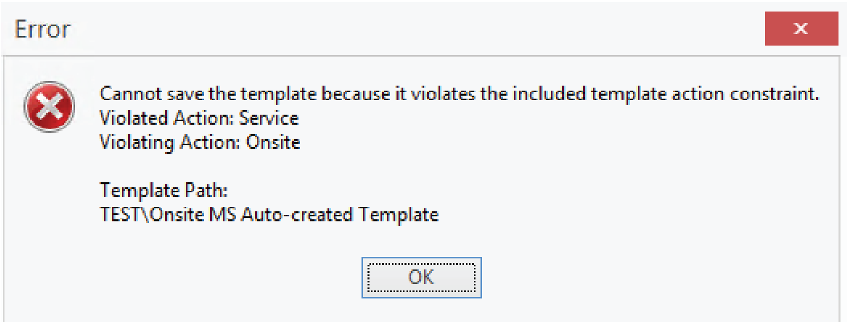


You will also notice that, once you have selected an appropriate value, the option to 'Create Action Link' appears, and is ticked by default. When saved, the link to the applicable action (based on the restriction you have set) will be created for you, and you will not have to go to Template Rules to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



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.

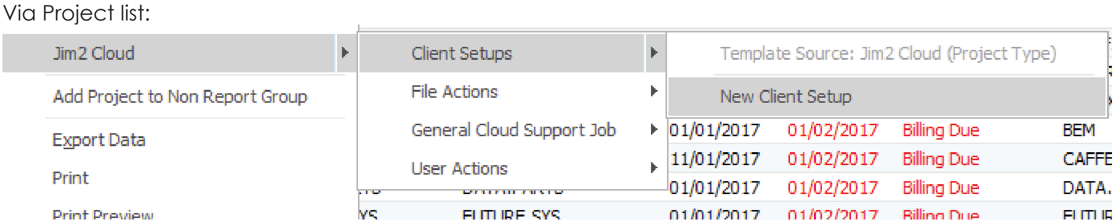


Step 5. Generating jobs using Project Templates

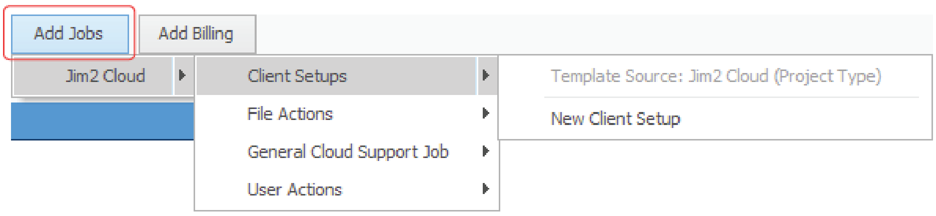
Now we have completed the setup, the template is ready to use. Either from an existing project or by creating a new one, ensure it has the appropriate Project Type (as per what you created in Step 2).

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.

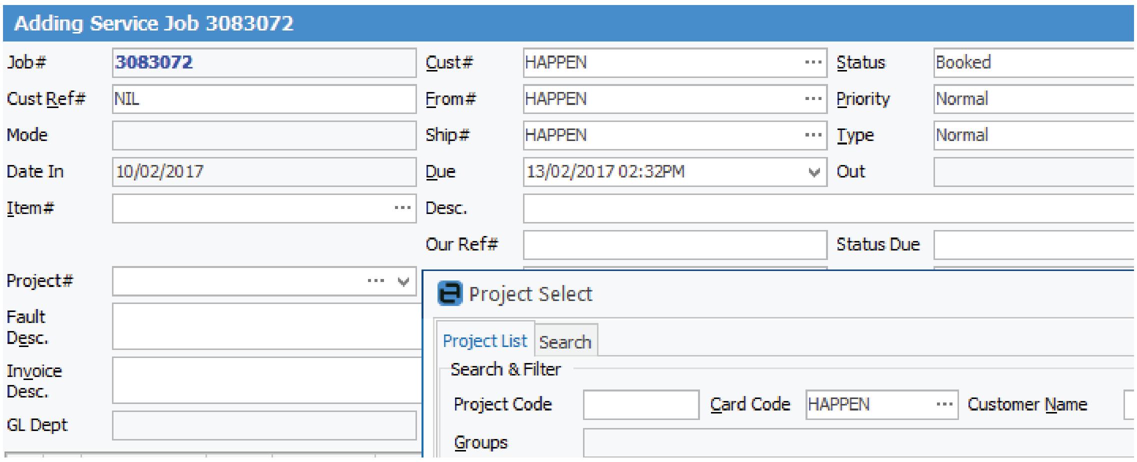
Via Project list:



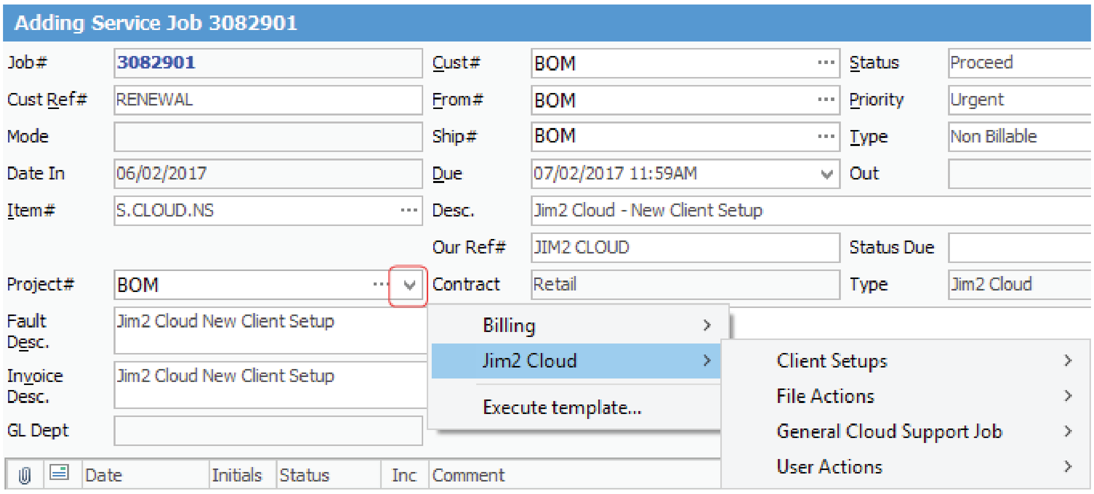
Via project:



Via job when prompted after the project selection prompt:



Via job when prompted after the project selection prompt:



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

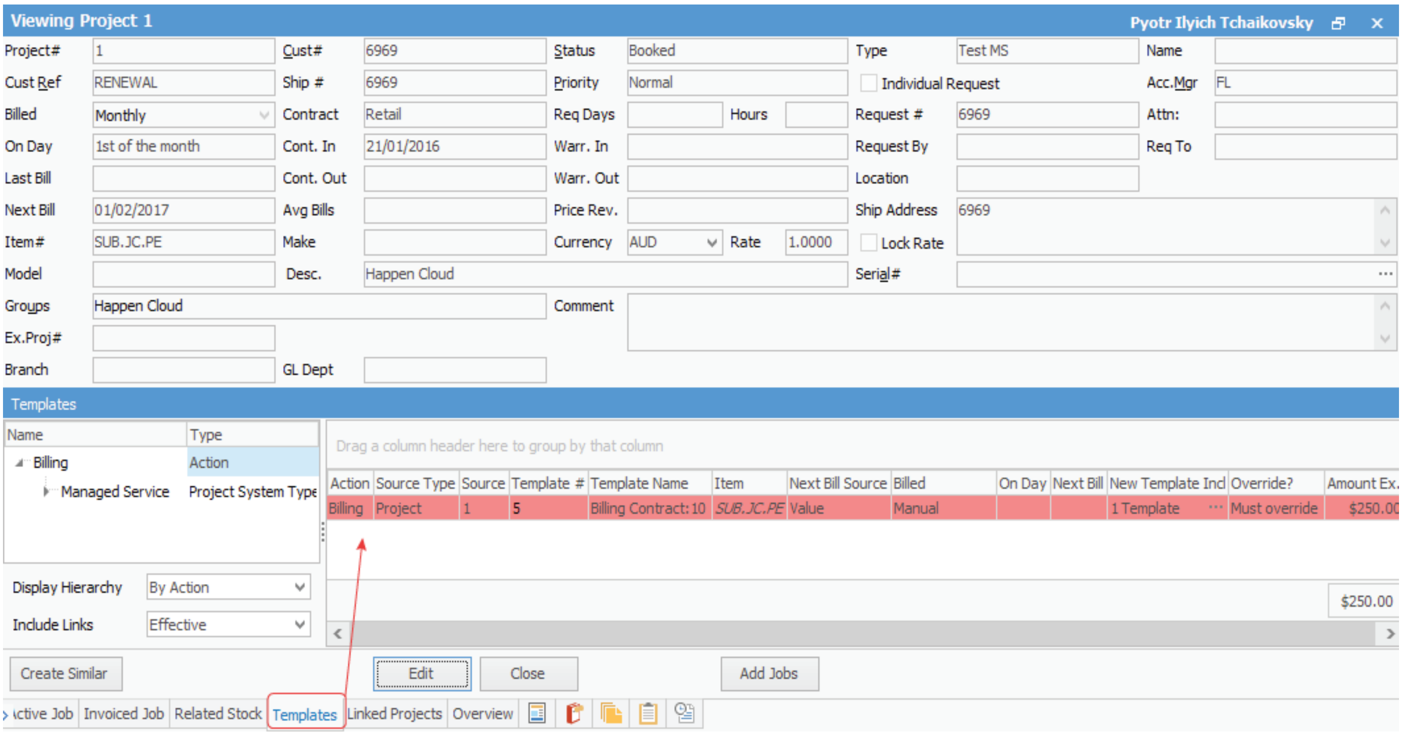
We could create a quantity of templates, and associate them to an Action. With the appropriate settings, the selection of the Action from the Project list or Project menu will initiate the creation of multiple jobs at a single click – great for IT projects, and here it Happen we use it for the creation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



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.

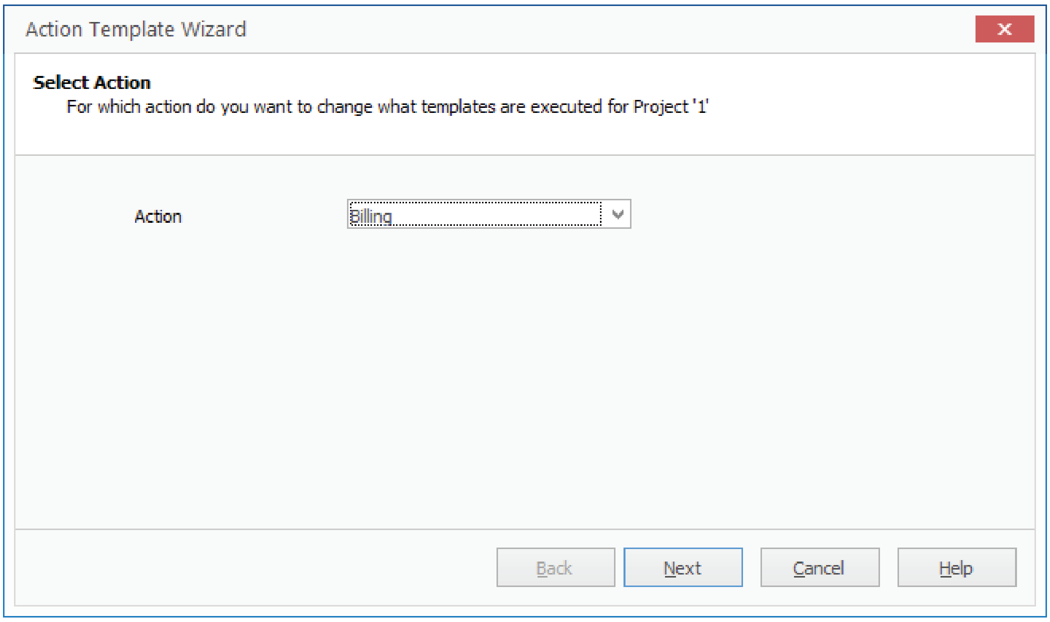
*If you open an existing project you will see the new project-specific billing template that has been created and associated to the project as part of the upgrade.

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.

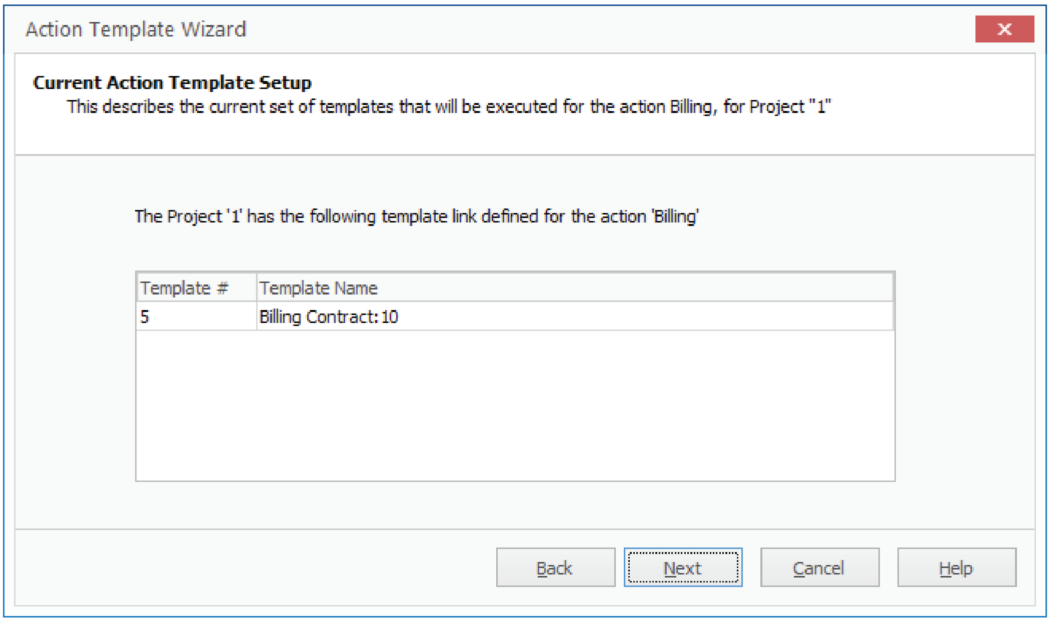
This means you must create a project-specific Billing template before you can generate a billing job from this project.

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

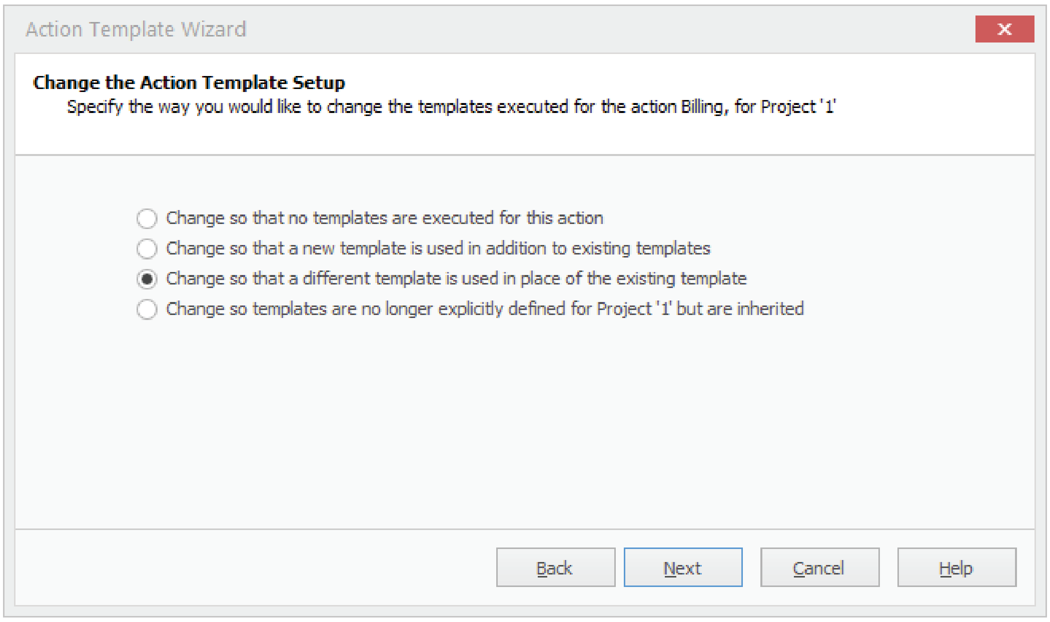
1. Select the 'Billing' action:



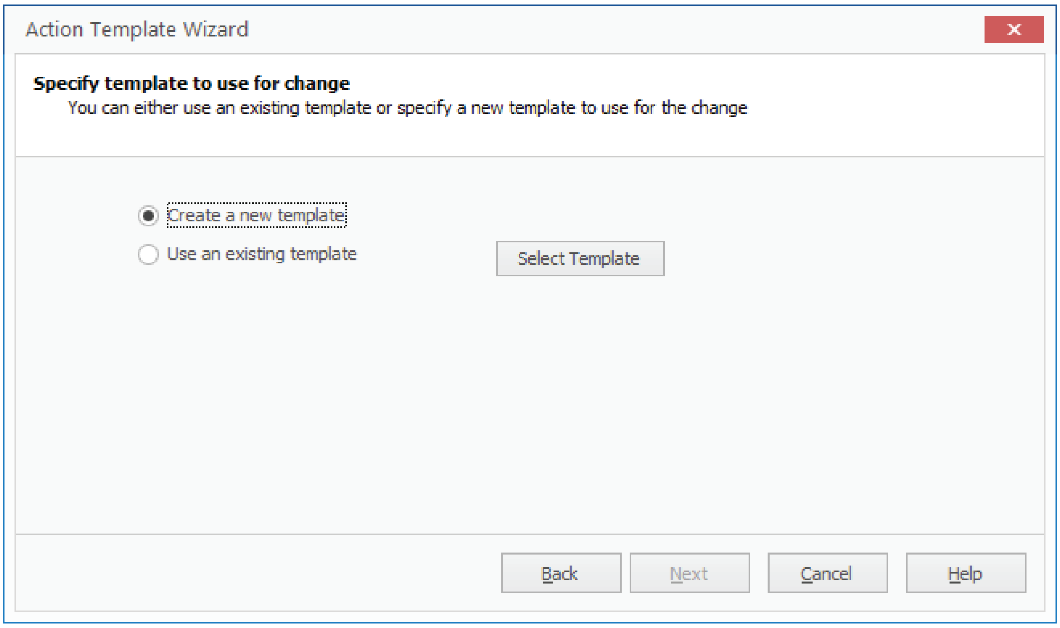
2. Confirmation of the default inheritance (this can be removed later):



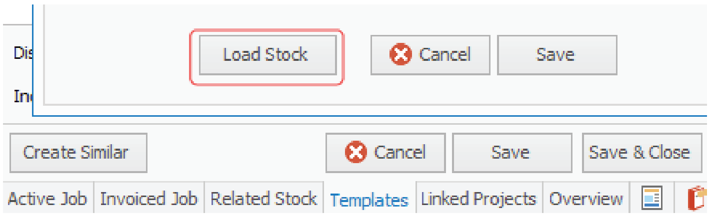
3. Template Setup – select 'Change so that a different template is used in place of the existing template:

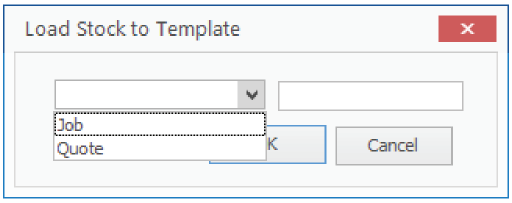


4. Select the 'Create New Template' radio button – this will then initiate the new template creation:

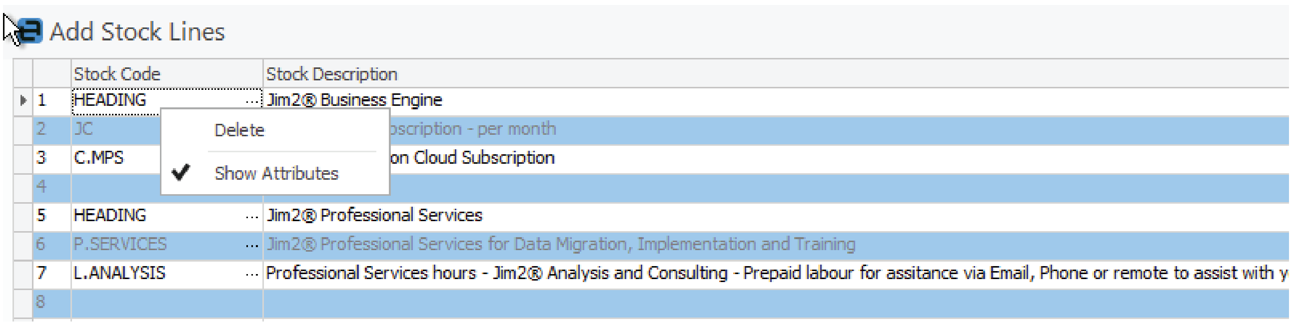


- Take note of the values in the Preview that are being inherited.
- Select the 'Create New' button.
- Select 'Billing Job' – **Important!**
- Enter any changes you wish to make to the header values.
- Add the stock to the grid.
- Kits are supported.
- Pricing can be overridden or inherited using the 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.

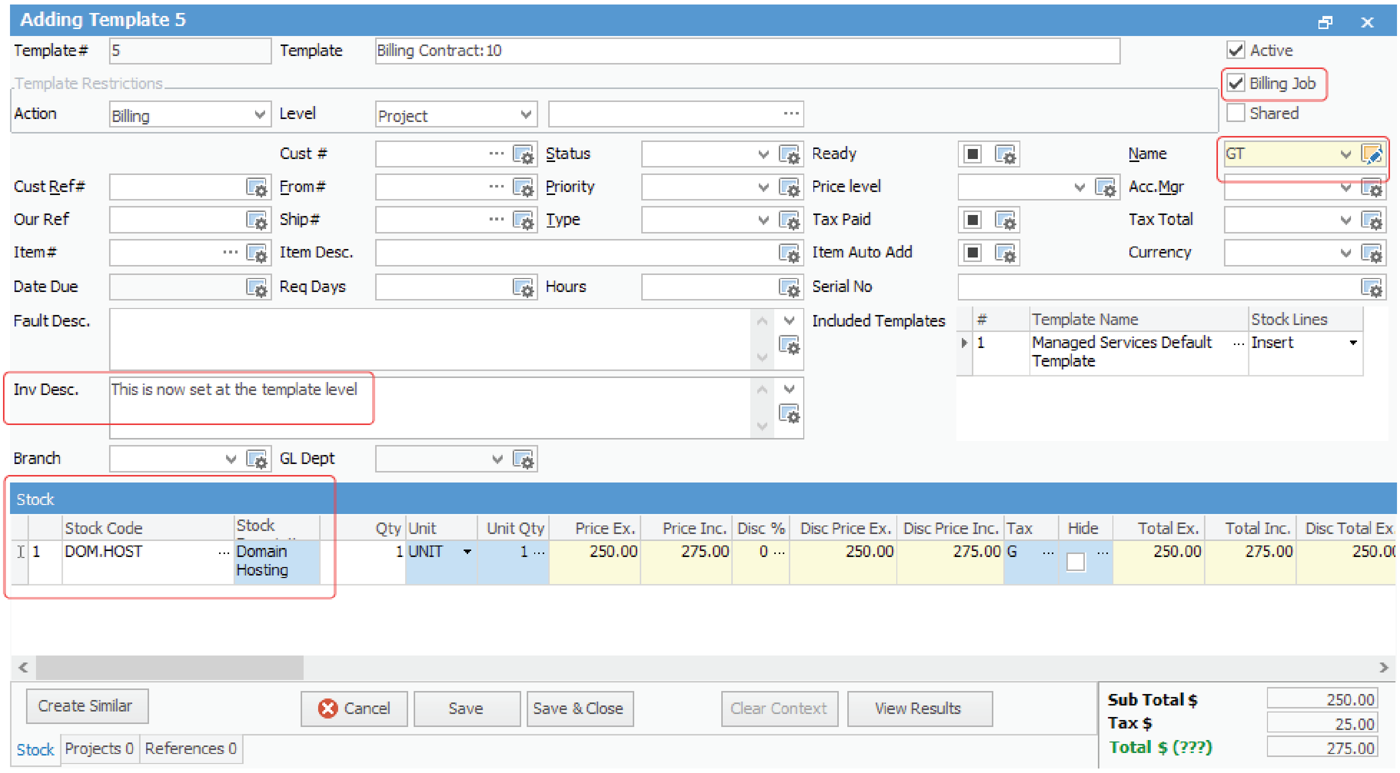




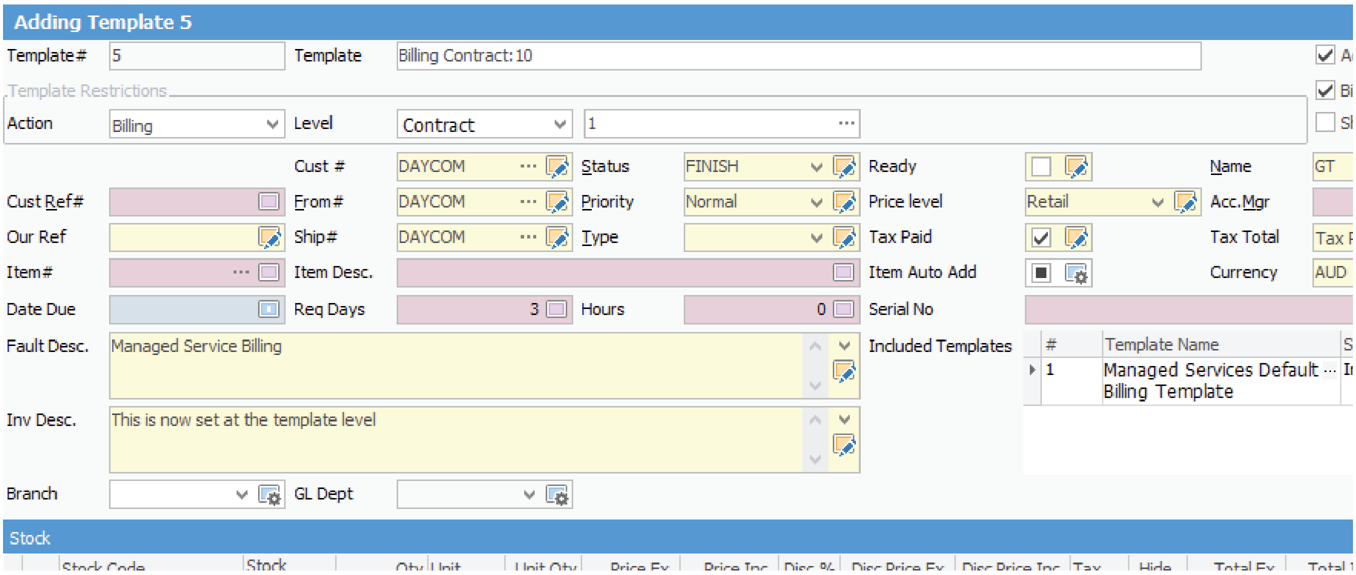
When you click ok, 'Add Stock Lines' will pop up, showing what you have selected to add. You have the ability to show attributes or delete stock from the preview at this point.



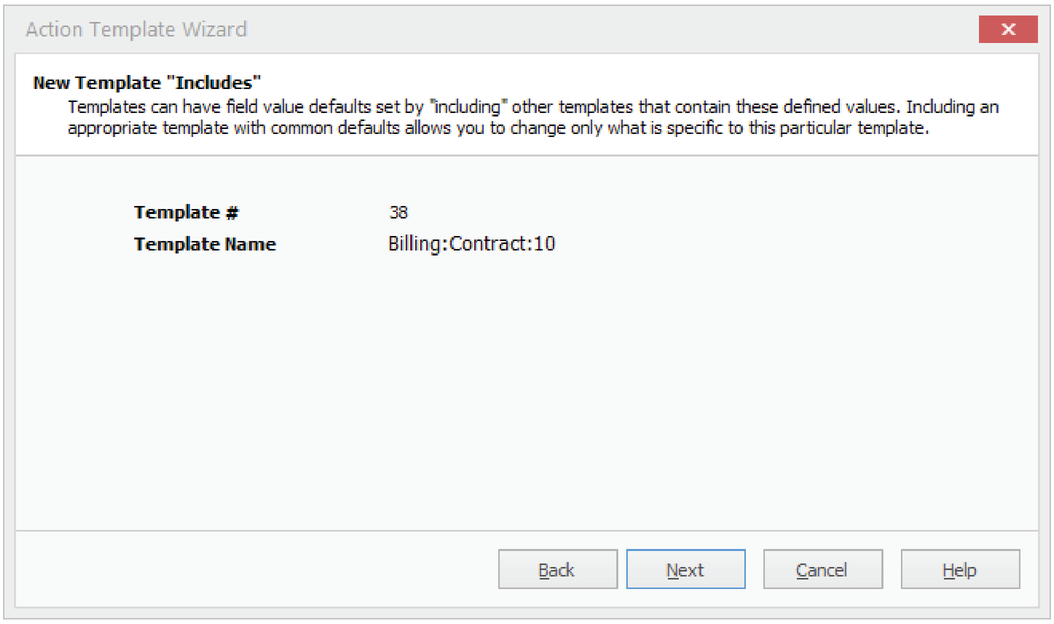
- The Template Name has been created for you, and we recommend this convention, but it can be changed at any time.
- Note that we have left the included template to save time and future administration, by inheriting the default values from the Managed Services Default Billing Template. You could remove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



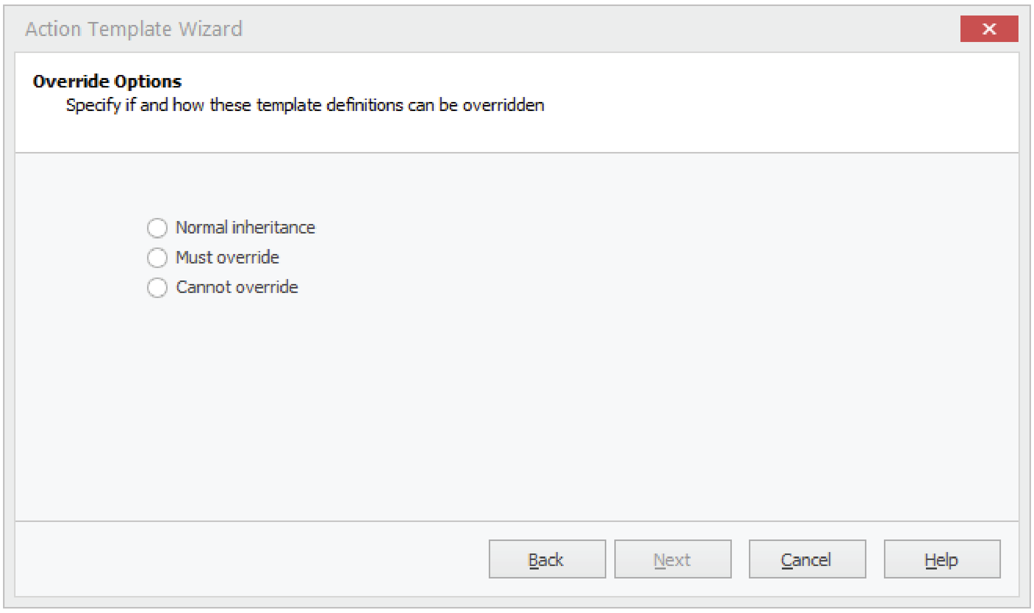
Once you have made your changes, select 'View Results' so you can see exactly what this template will use when creating a billing job.



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



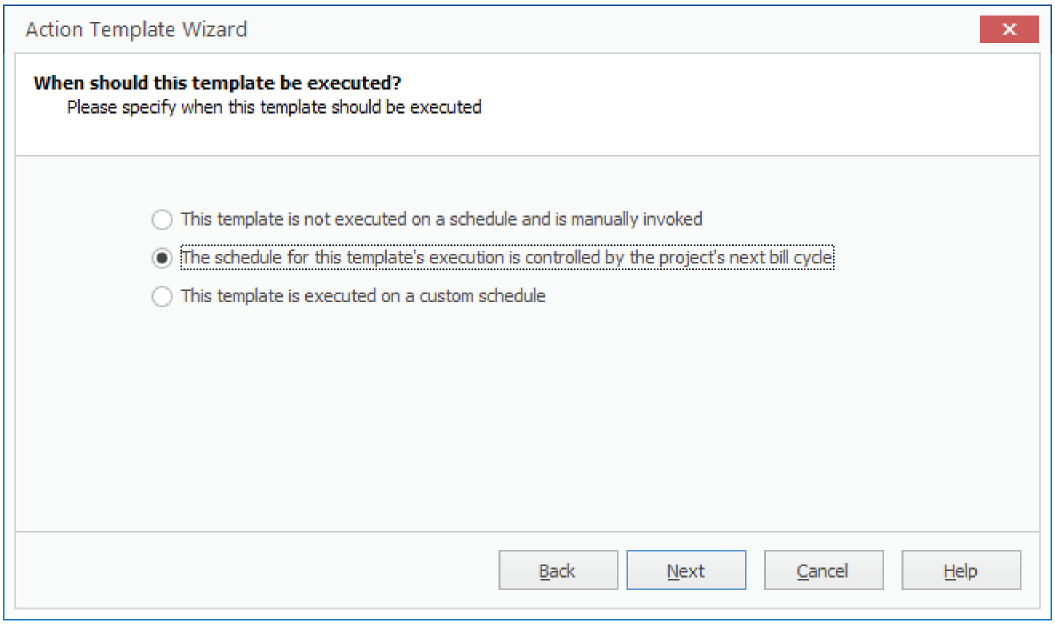
Click ‘Next’ to see the Override Options window.



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.

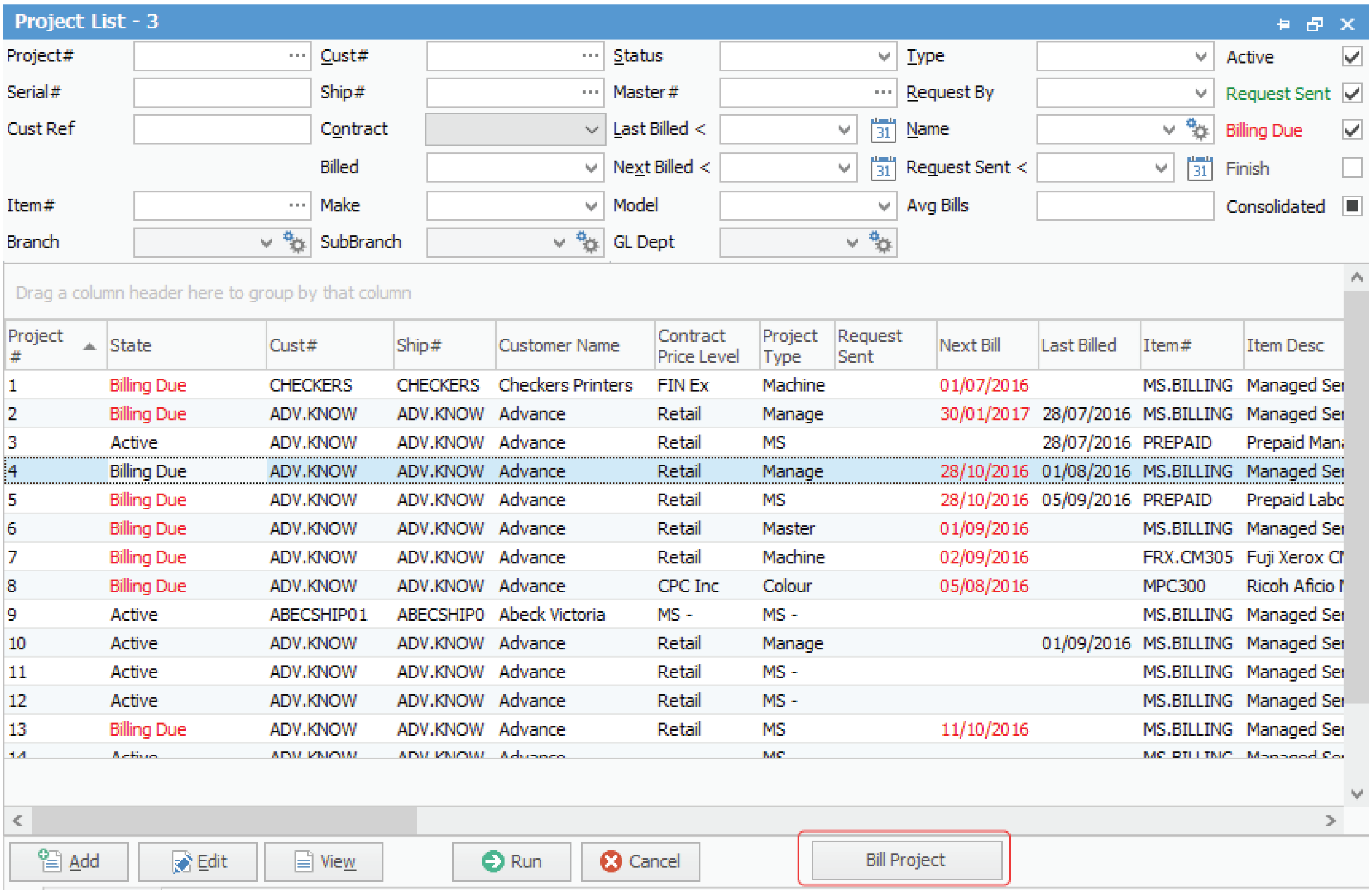


Above we have selected to inherit the schedule from the project, but there are cases where this is not appropriate, and a custom date needs to be configured. If you bill manually from the contract, then you can select the Manual option.

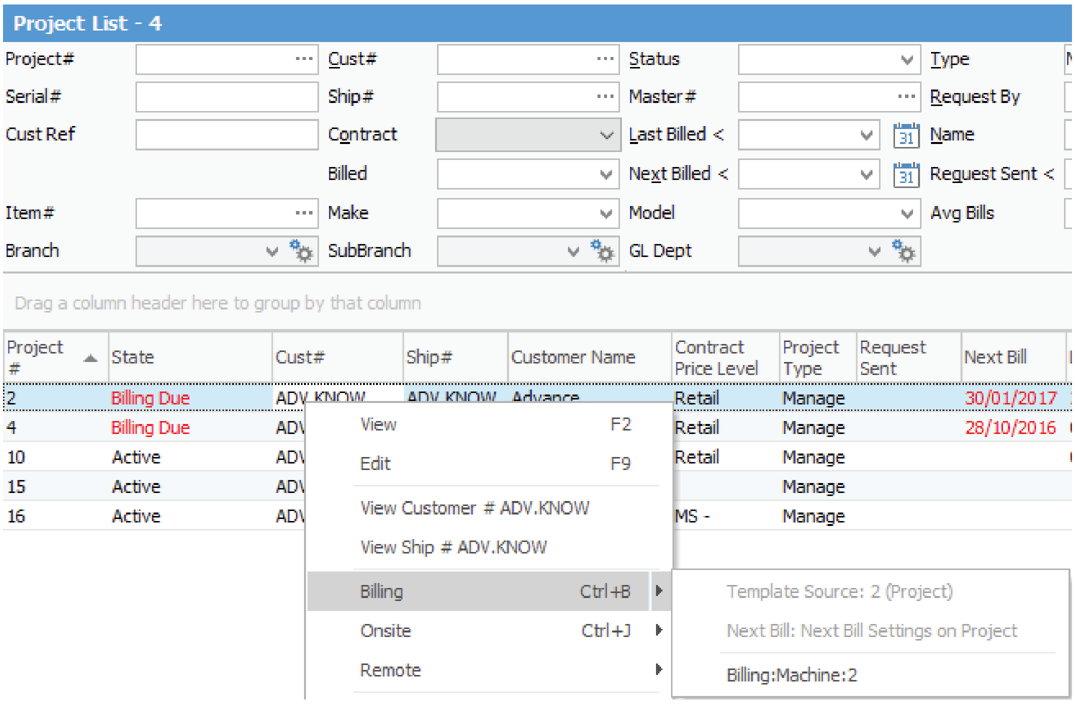
Confirm the configuration by selecting ‘Finish’, and you will be returned to the Project Template tab. Select ‘Save’ to save the work we have done to the project, and you are now ready to bill from the project.

Generating the Billing Job can be done via:

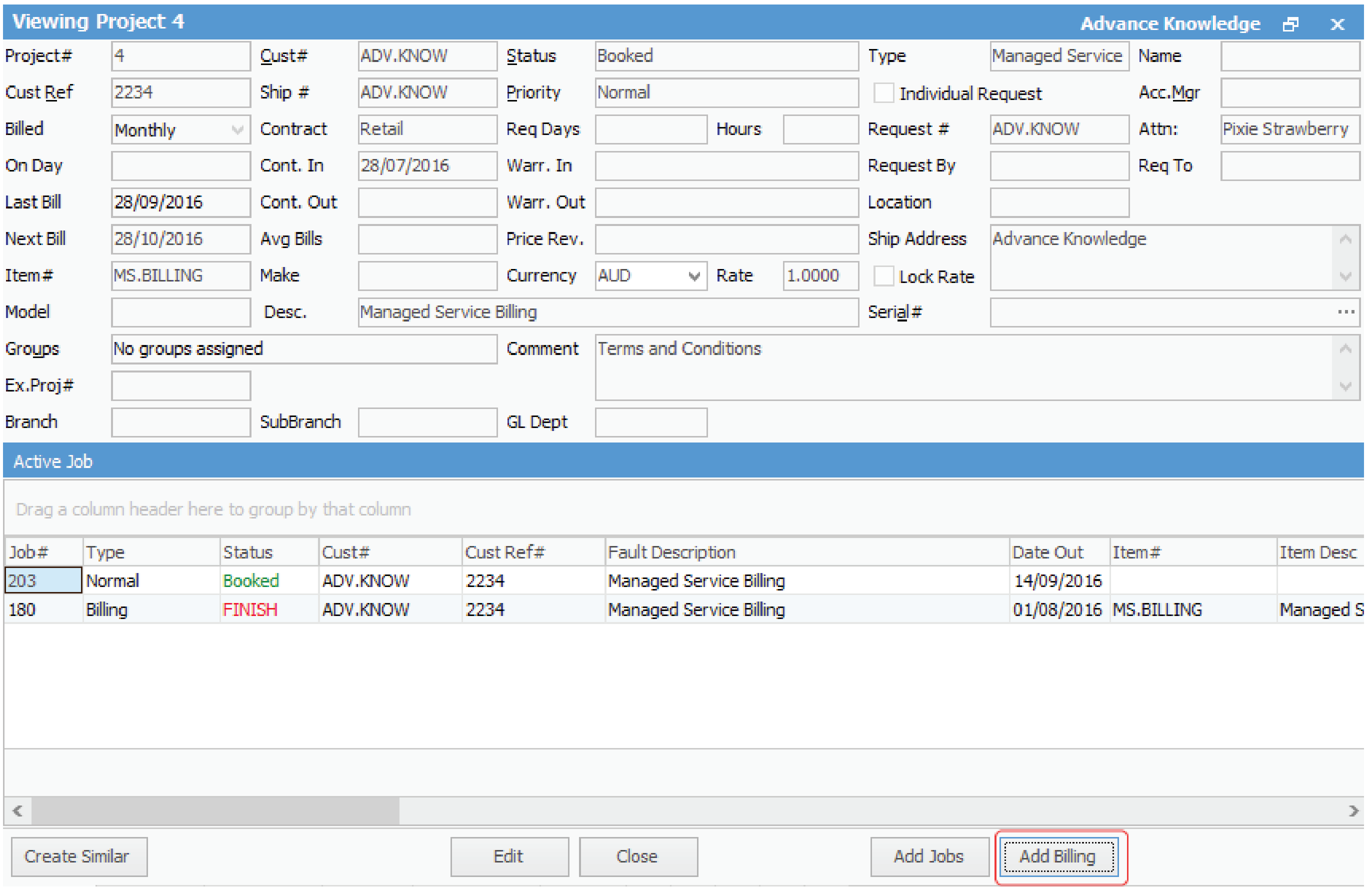
Project list



Project List via right click menu



Within Project



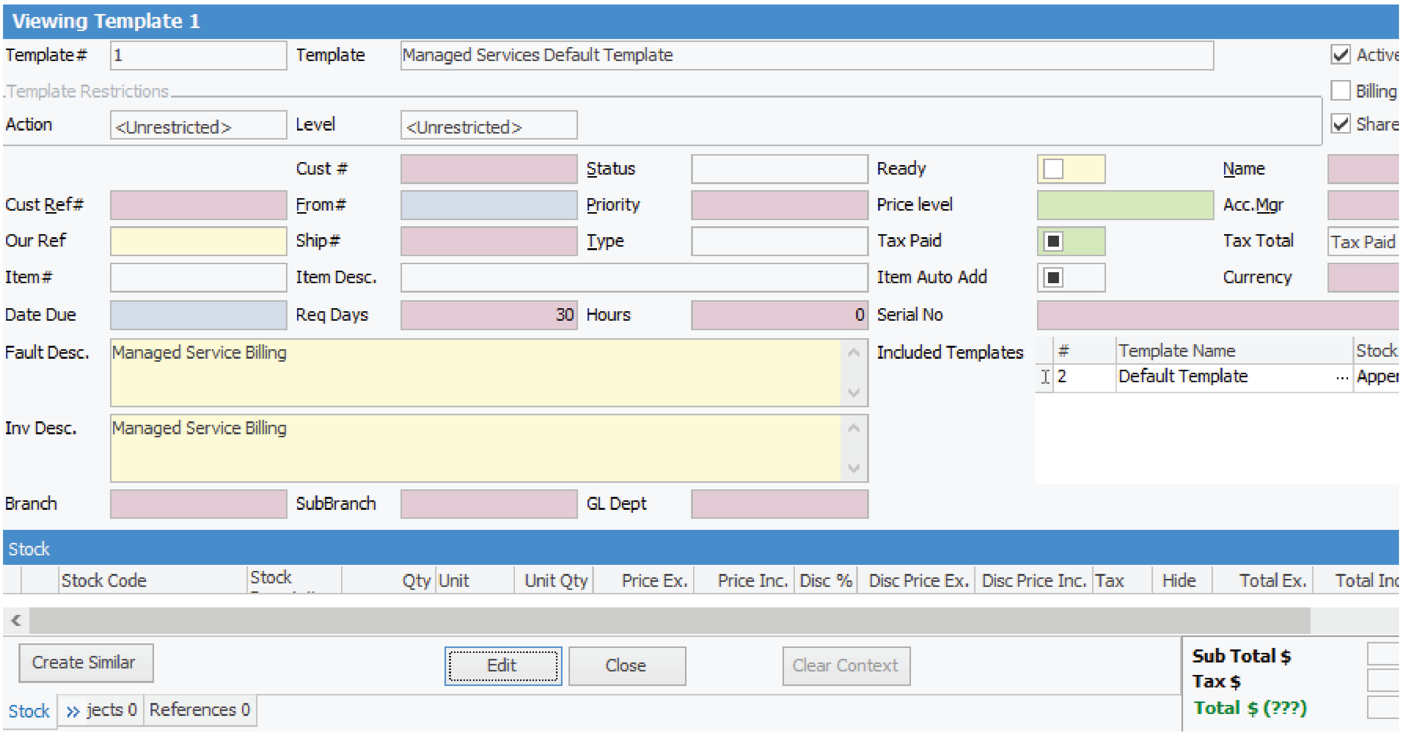
*Generation of billing jobs with recurring schedules cannot be performed at job level; they must be created from the Project or Project list.

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.



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

Contained Template2 within project template
- First included template within included template2
- Second included template within included template2 (status value of XYZ configure)

Status value shown on project template and used in job creation: XYZ

Example 2
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 (status value of UVW configure)

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

Status value shown on project template and used in job creation: UVW

Example 3
Project Template (has no value for status configured)
Included template1 within project template (status value of EFG configure)
- First included template within included template1
- Second included template within included template1(status value of UVW configure)

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

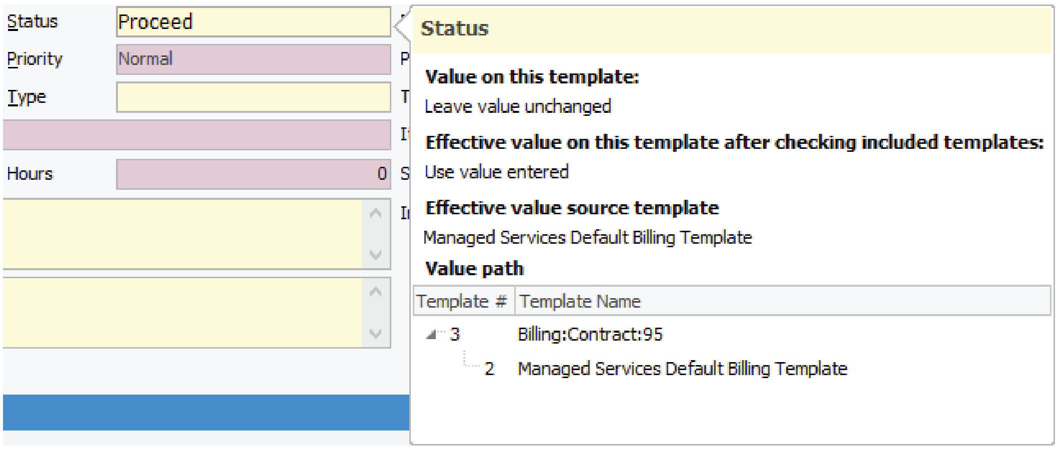
Status value shown on project template and used in job creation: EFG

Example 4
Project Template (status value of ABC configure)
Included template1 within project template status value of EFG configure)
- First included template within included template1
- Second included template within included template1 (status value of UVW configure)

Contained Template2 within project template
- First included template within included template2
- Second included template within included template2 (status value of XYZ configure)

Status value shown on project template and used in job creation: ABC

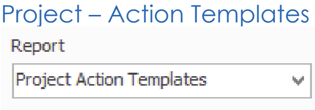
Important: The value and where it is found is displayed by hovering over a given template value when in 'View' mode as per the image below:



New Reports relating to Action Templates

Project List – Action Templates

Project – Action Templates



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?

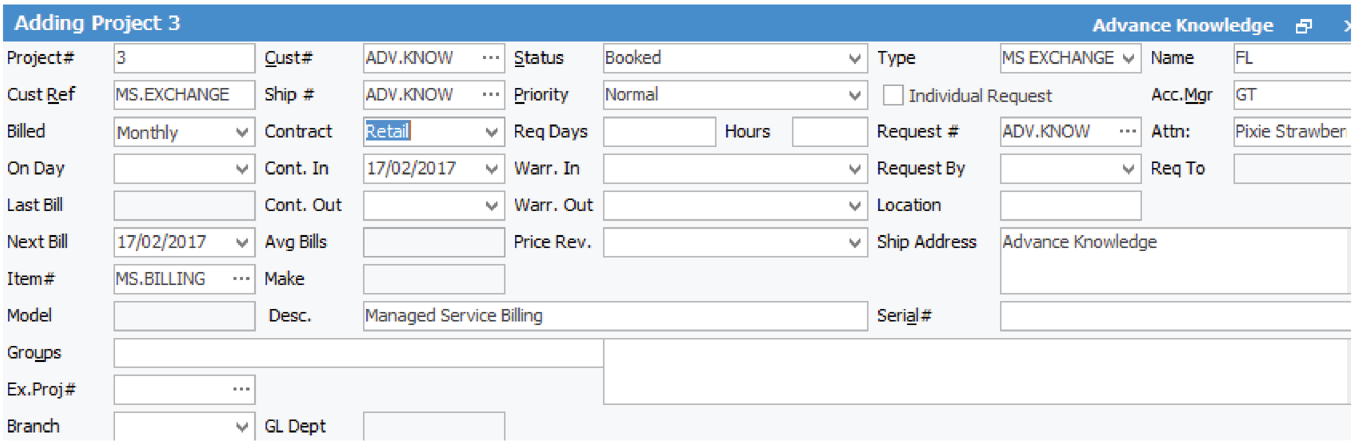
The upside is fewer projects per client, but this is not generally an issue given the flexibility in which they can all be billed on the same monthly invoice using existing Jim2 bulk invoicing capability.

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

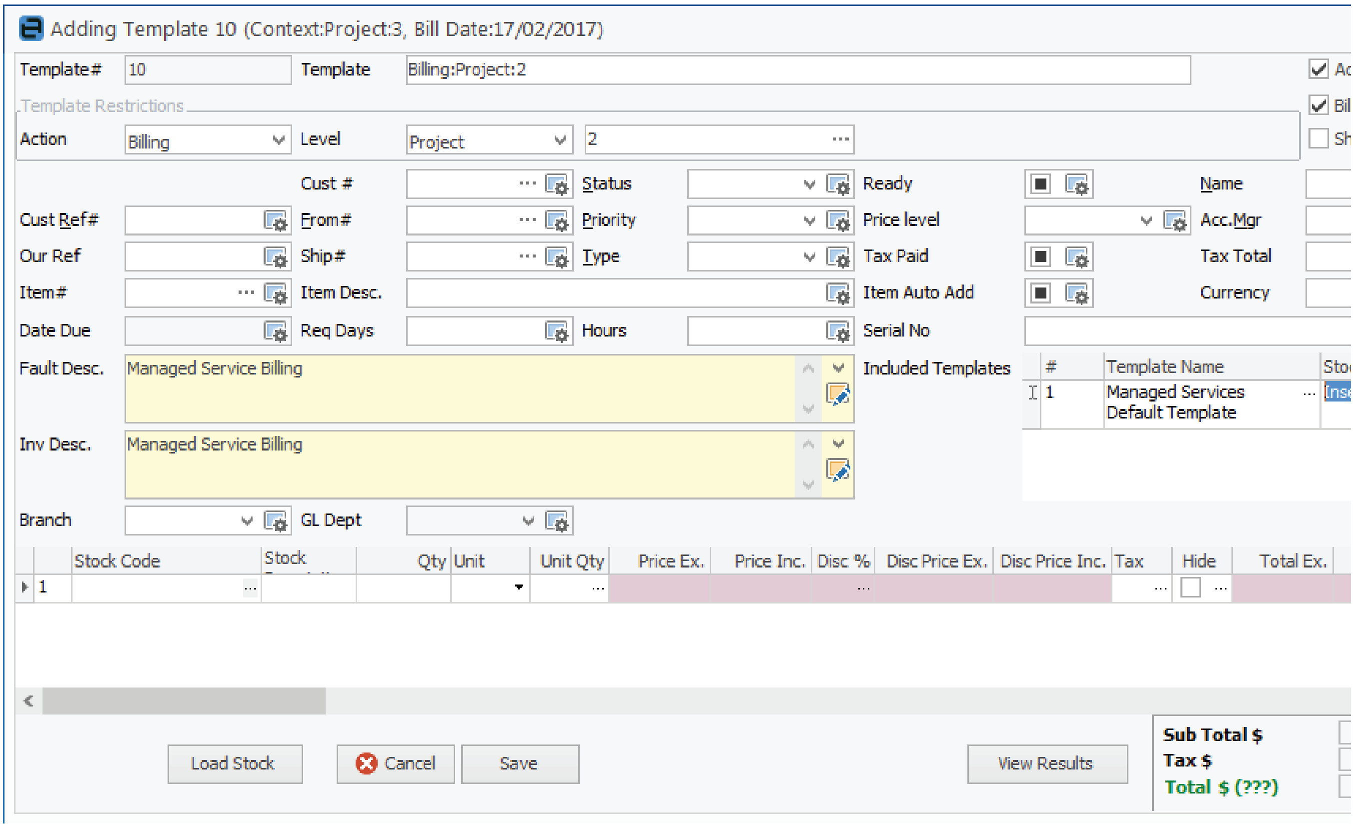
Step 2 – Create your Projects (Contracts) and Contract specific billing templates

Go to **Projects > Add Project**.

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



- 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:



- 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.

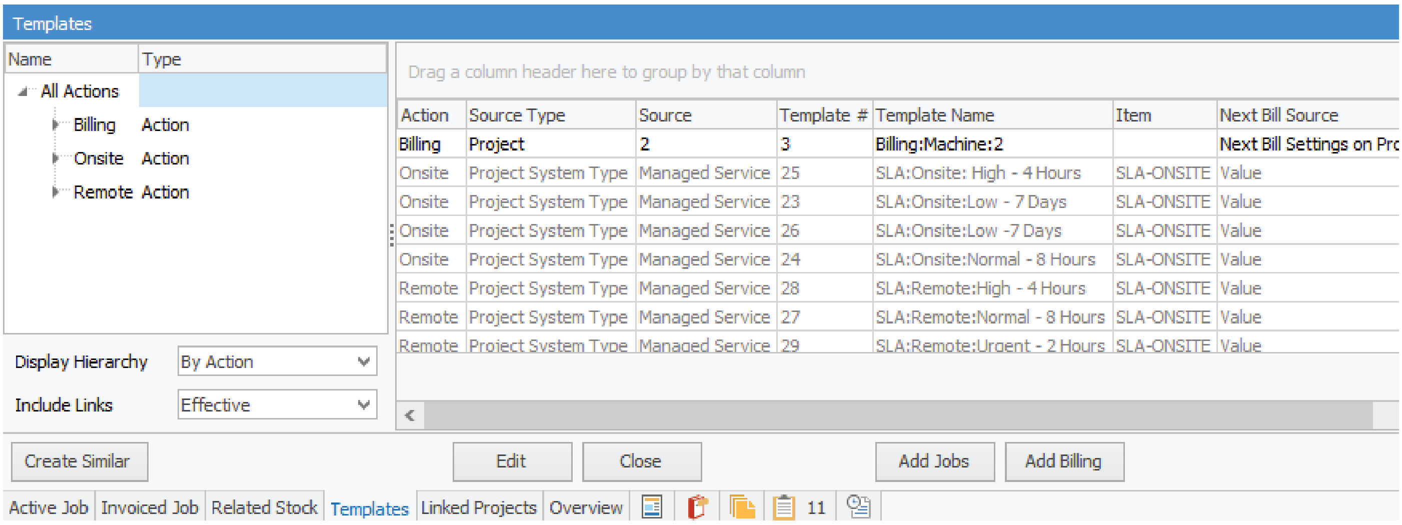
The Templates tab of each existing contract will now show the applicable billing template, which can be viewed and edited as appropriate.
Other examples in these release notes should provide the information required to further streamline and assist the billing template management.

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.

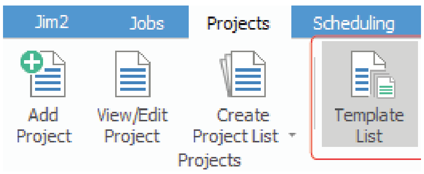
Log in to the Training Database.
The first thing you will notice when running a project list is that all the projects with billing stock will have a contract value in the 'Billing Total Ex.' column. You will also see the Billing Total in project lists and the billing template itself.

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

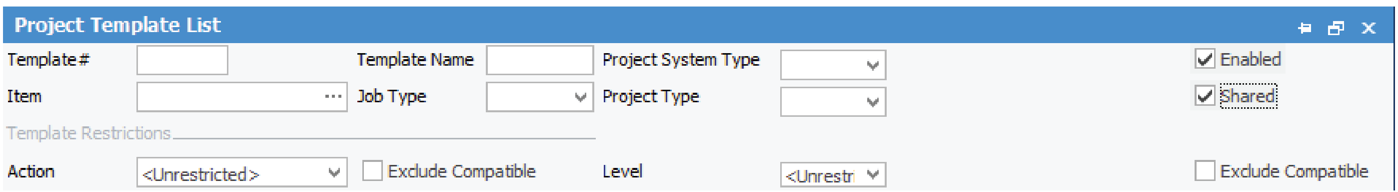


or you can view them all via the ribbon.

Select **Projects > Template List**.



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



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

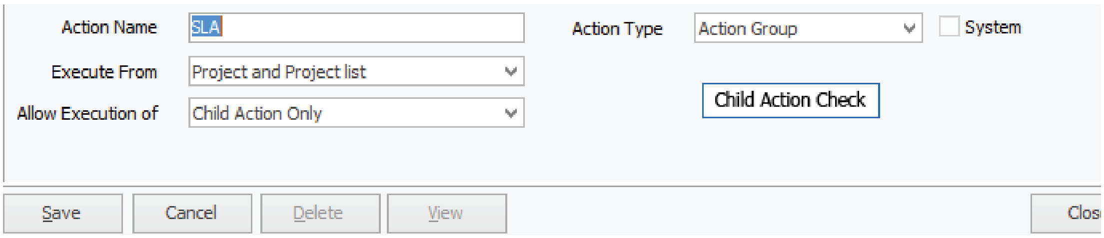
Managed Services and Managed Print Services Edition – New Non-Billing Template Setup and Usage

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.

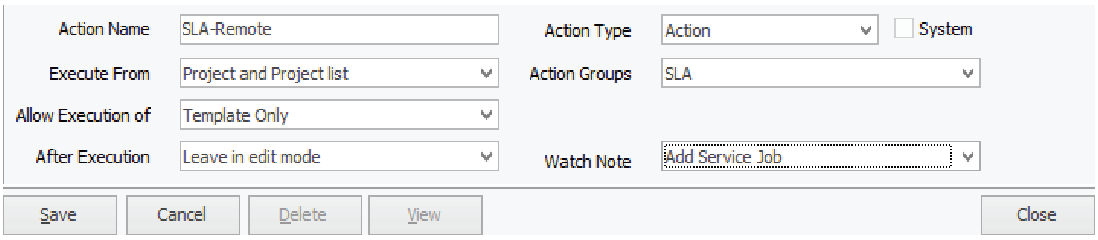
In this example, we will create a new set of templates that can be used for quickly creating or updating jobs with correct Service Level Agreement job data. The fields you use will be specific to your business and data capture requirements.

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

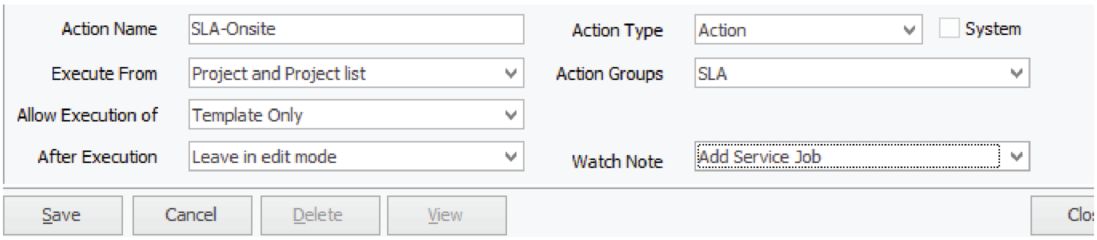
Create an Action Group Called SLA and configure to only allow execution at 'Child Action Level'.



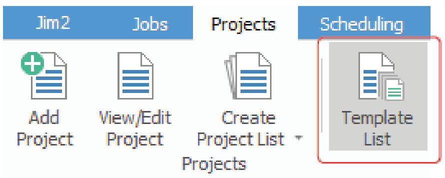
Create a new action called SLA-Remote linked to the Action group SLA above, and restrict the template so it can only be executed from the Action Group at Template Level.



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.



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

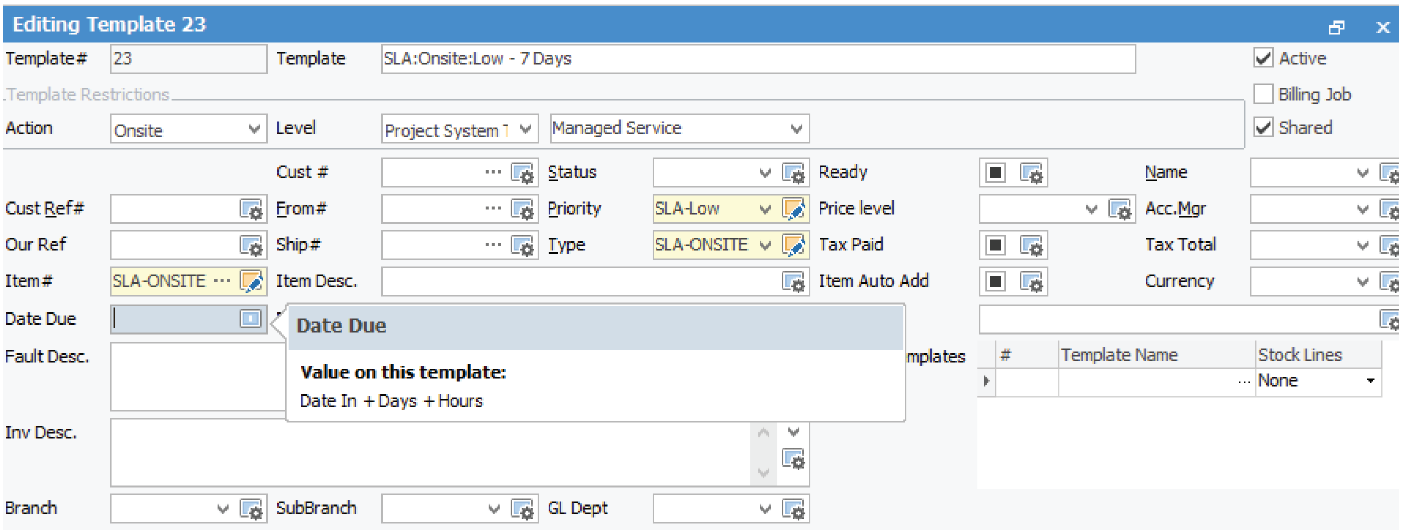


Select Add, then configure name, and save the first template.

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:



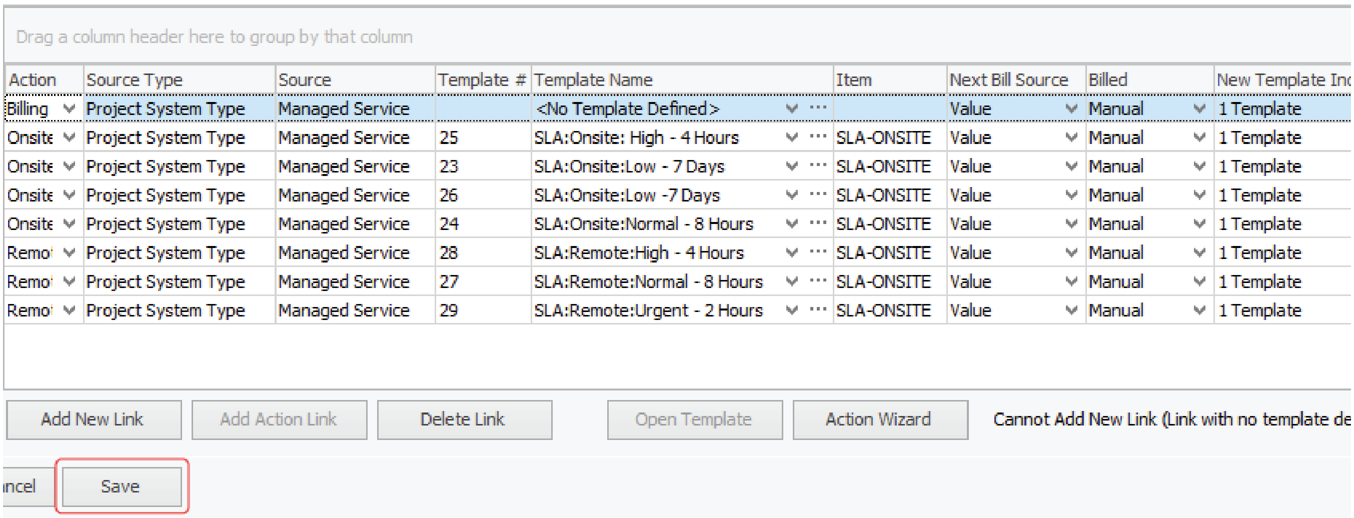
Now we will link the new templates to the new Action using the Action Wizard.

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:

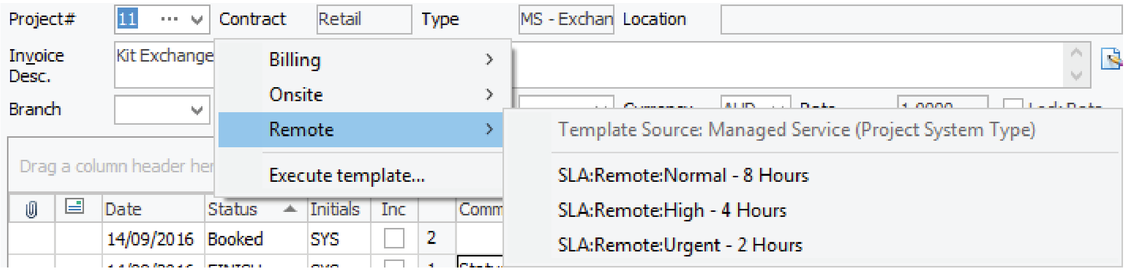
- Select the Action Wizard.
- Select SLA Onsite from the drop-down then select 'Next'.
- You will now see that the template previously associated is displayed. Select 'Next'.
- Select 'Change so that a new template is used in addition to existing templates'.
- Select 'Select Template', then select the 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.



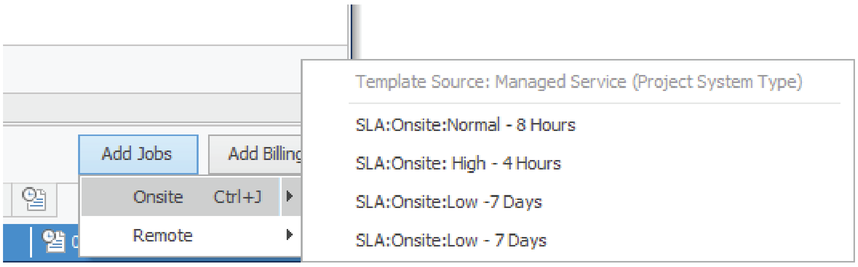
Action	Source Type	Source	Template #	Template Name	Item	Next Bill Source	Billed	New Template Inc
Billing	Project System Type	Managed Service		<No Template Defined>		Value	Manual	1 Template
Onsite	Project System Type	Managed Service	25	SLA:Onsite: High - 4 Hours	SLA-ONSITE	Value	Manual	1 Template
Onsite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

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:

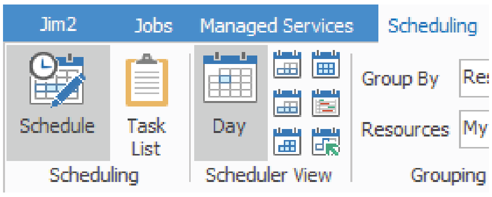


From within a project, using the ‘Add Jobs’ button:

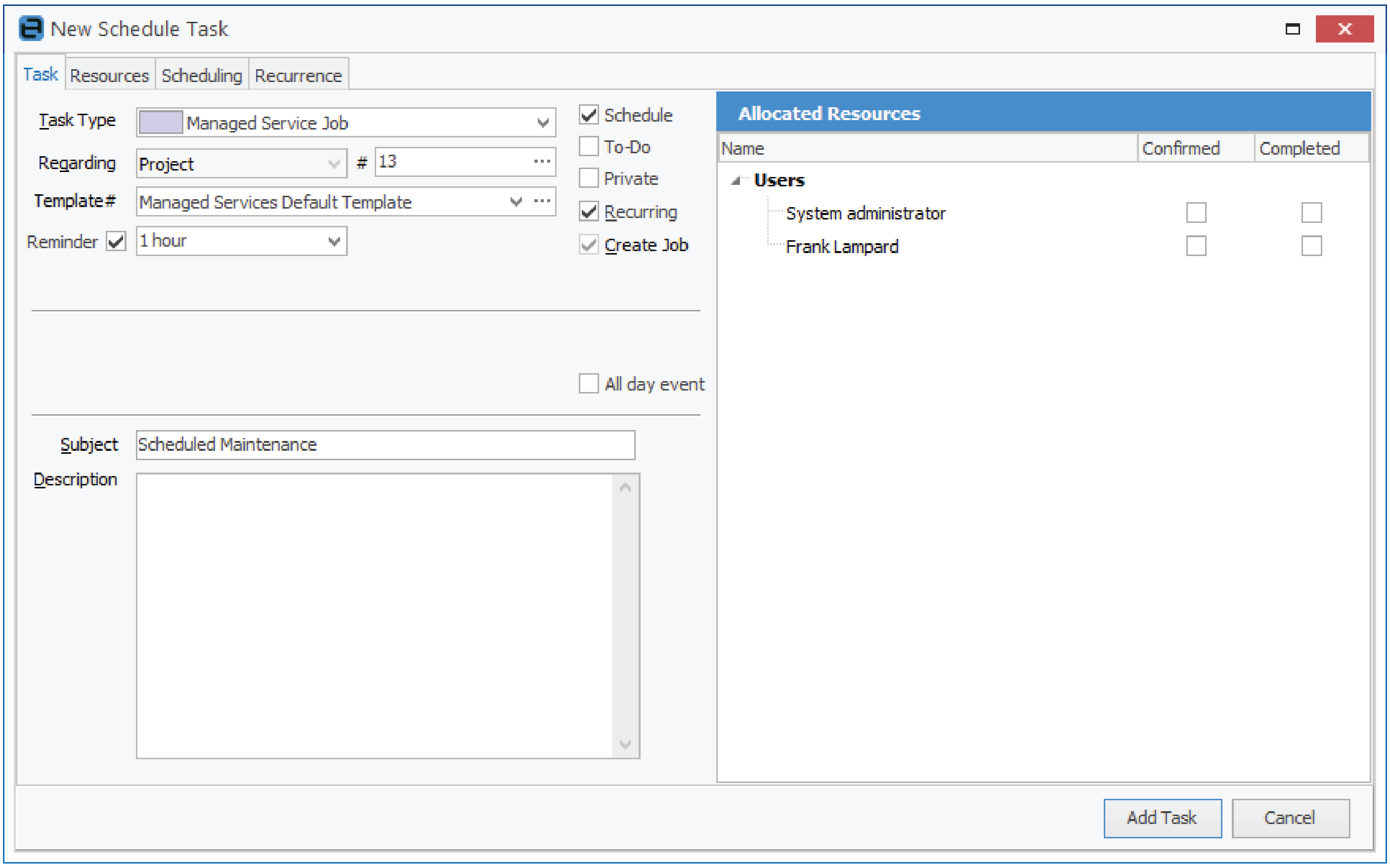


Create Recurring Managed Services Jobs

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:

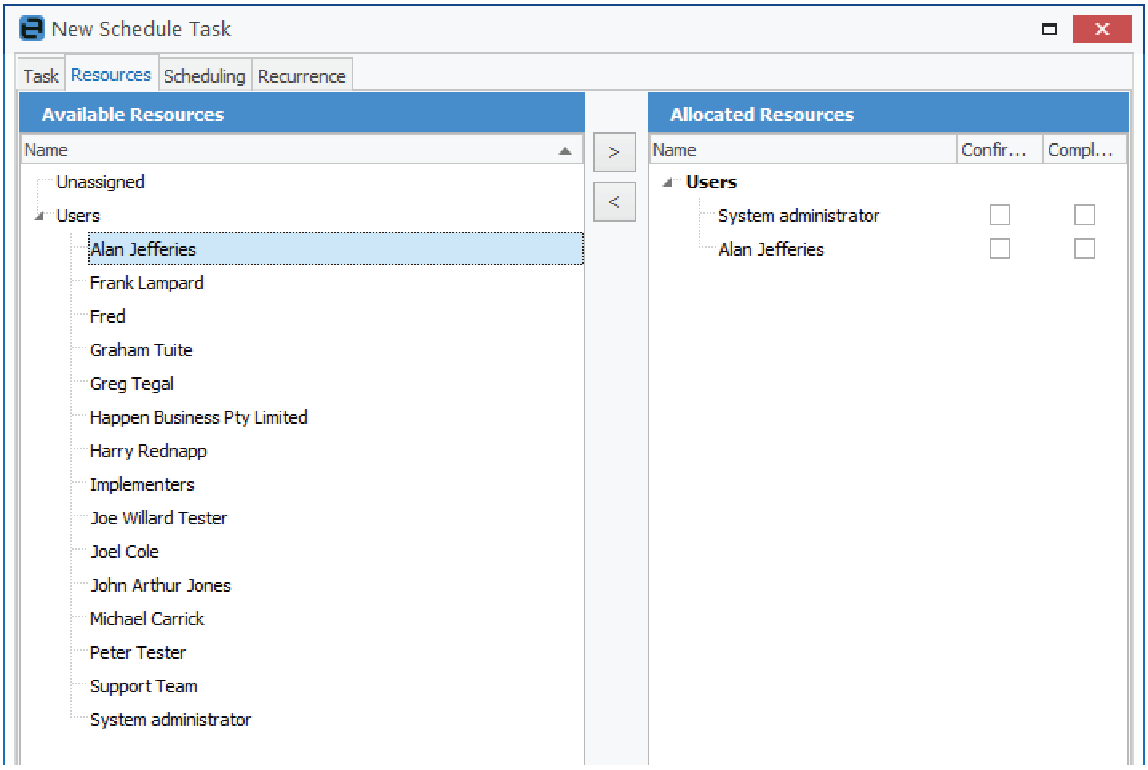


Complete the following:

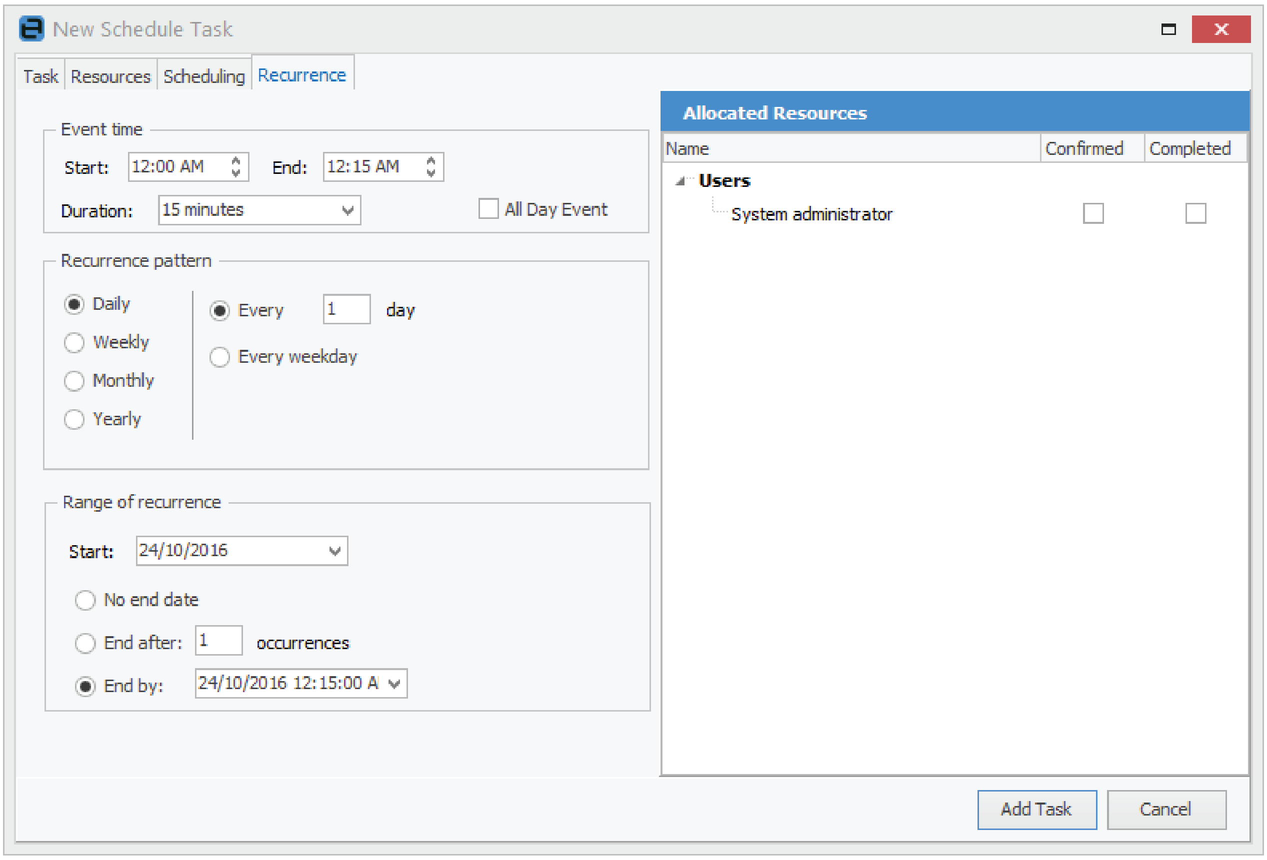
- Select Managed Service Job from the Task Type
- Select the applicable Managed Service number
- Select an applicable Project Job Template for the recurring jobs
- Ensure 'Schedule' and 'Recurring' are ticked
- Select a Reminder period, if applicable
- Enter an applicable Subject
- Click on the Resources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

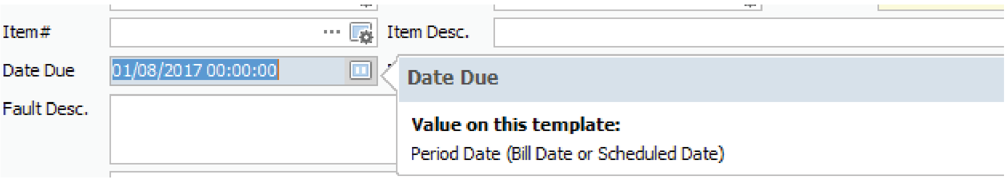


- Enter applicable event time, recurrence pattern, range of recurrence.



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?

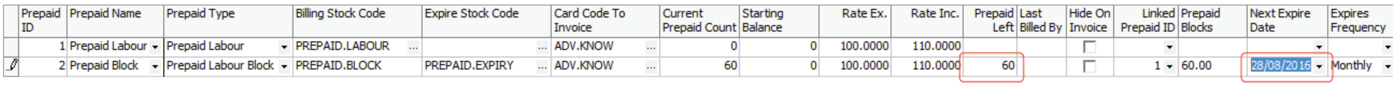
This is configured via **Tools > Options > Managed Services > Create Scheduled Managed Jobs XX days in advance**.

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 yoru Managed Services Options.

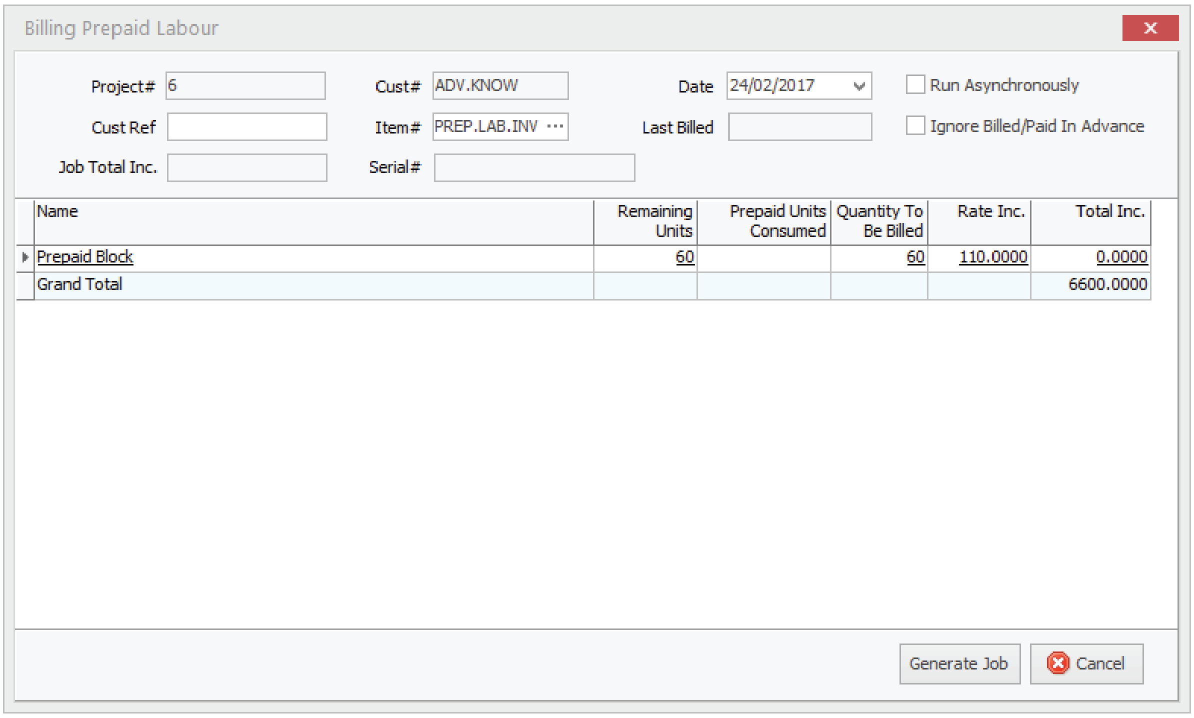
When jobs are created using the information configured within the Project Template, this includes (if applicable) who will be assigned the job in the Name field.

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							
2	Prepaid Block	Prepaid Labour Block	PREPAID.BLOCK	PREPAID.EXPIRY	ADV.KNOW	60	0	100.0000	110.0000	60			1	60.00	28/08/2016	Monthly



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

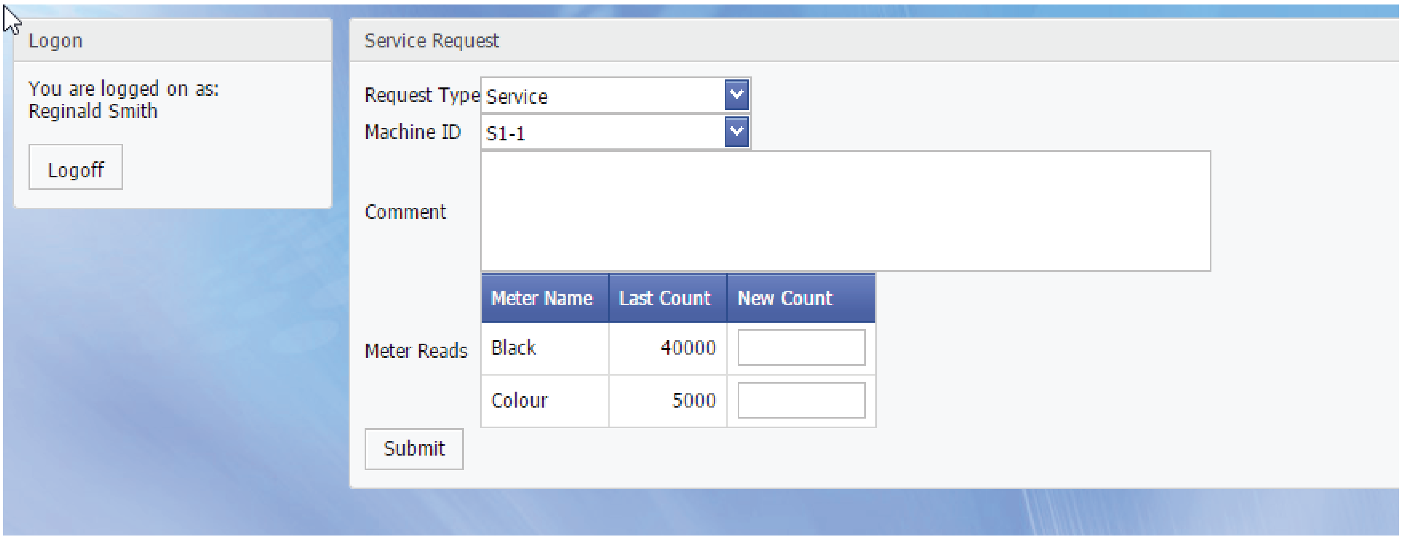
The XLS/XLSX MPS Connector no longer requires specific hardcoded XLS/XLSX format. You now have the ability to configure the Connector, specifying how the Connector finds particular columns required in the file. The location of columns can be specified either by index or by heading, and allows Jim2 to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



Net Overs and Net Clawback fields now available on invoice

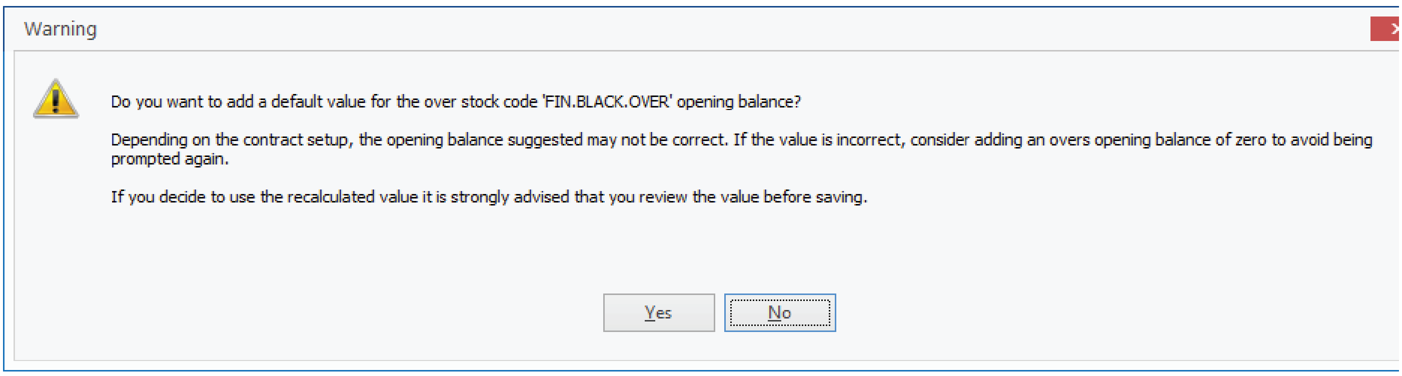
The master invoice summary may calculate that there were 2,000 over pages and 750 of these were clawed back. This would display two lines on the invoice summary.

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:



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

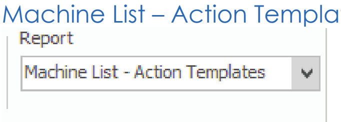
You can set a barcode on a project (button is the serial# field). This allows for the printing of a QRCoded URL that directs the customer to a page to submit service required or no login required.

Improved Meter Reads

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

Reports

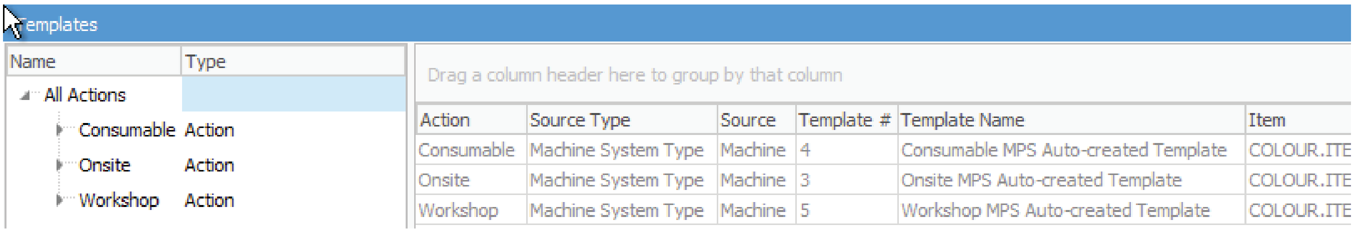
Machine List – Action Templates



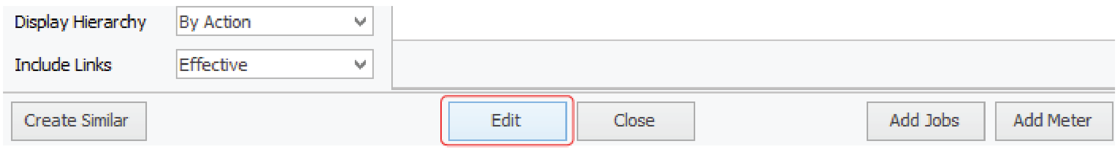
Machine – Action Templates

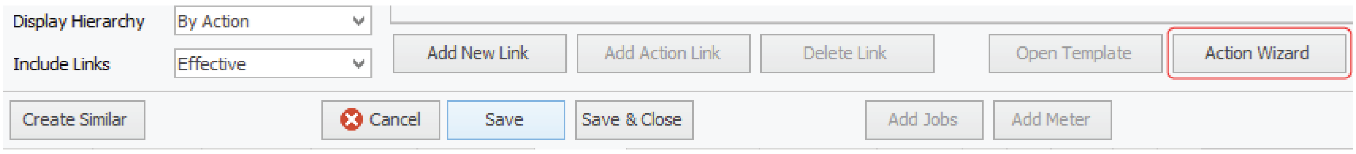
Create Machine Job Templates

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.

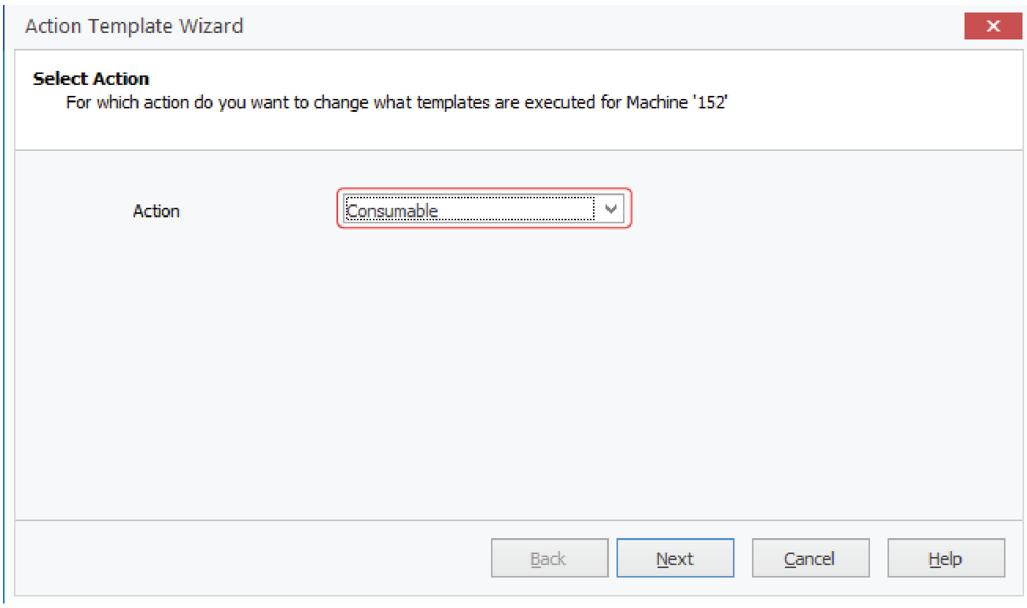


3. Select 'Edit', and then 'Action Wizard'.

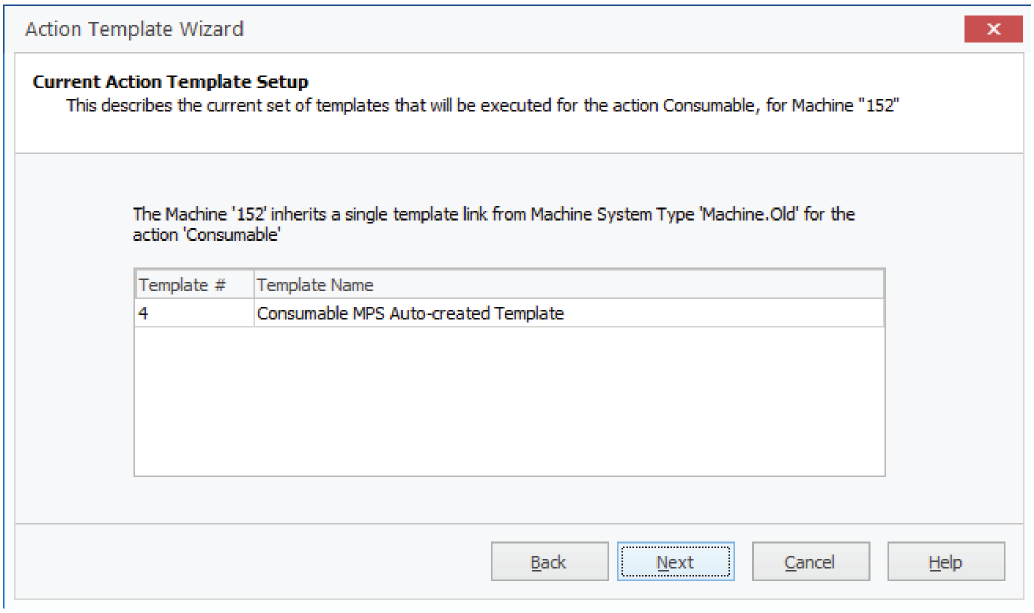




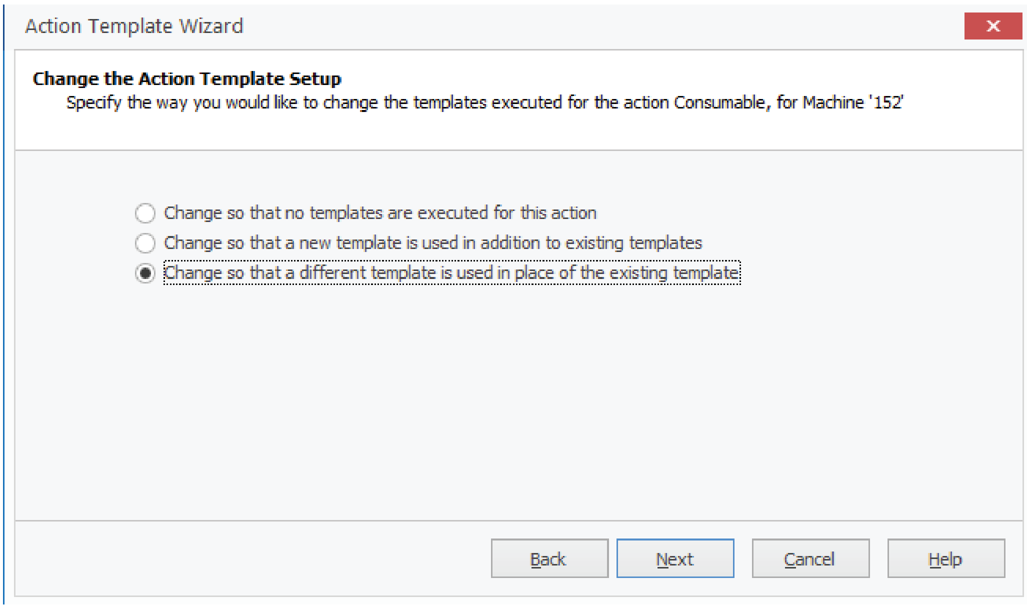
4. The 'Select Action' window is displayed. Select the Consumable action and then click 'Next'.



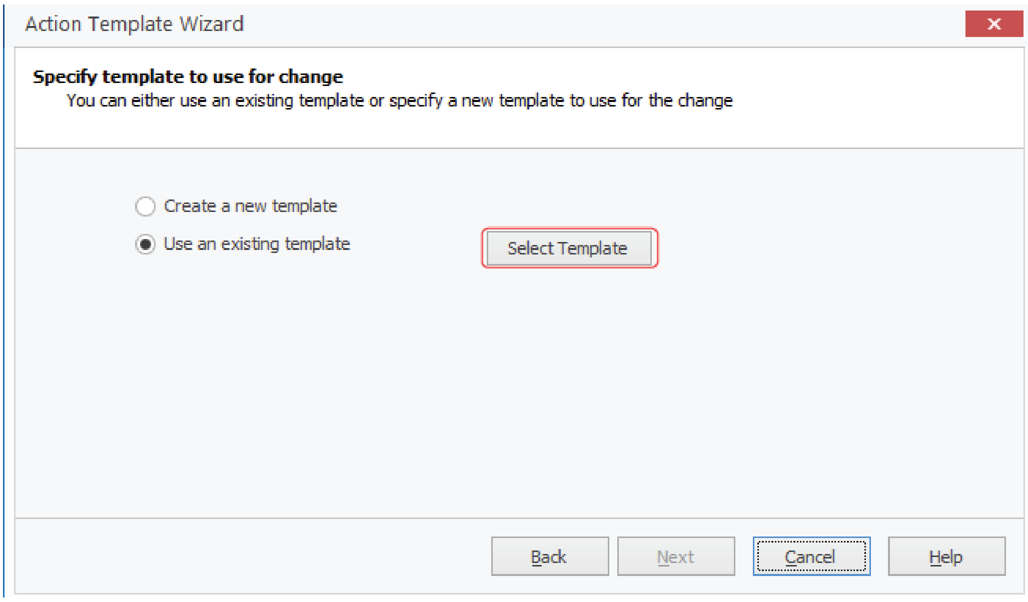
5. The ‘Current Action Template Setup’ window is displayed showing you the existing Consumable template. Select ‘Next’ to continue



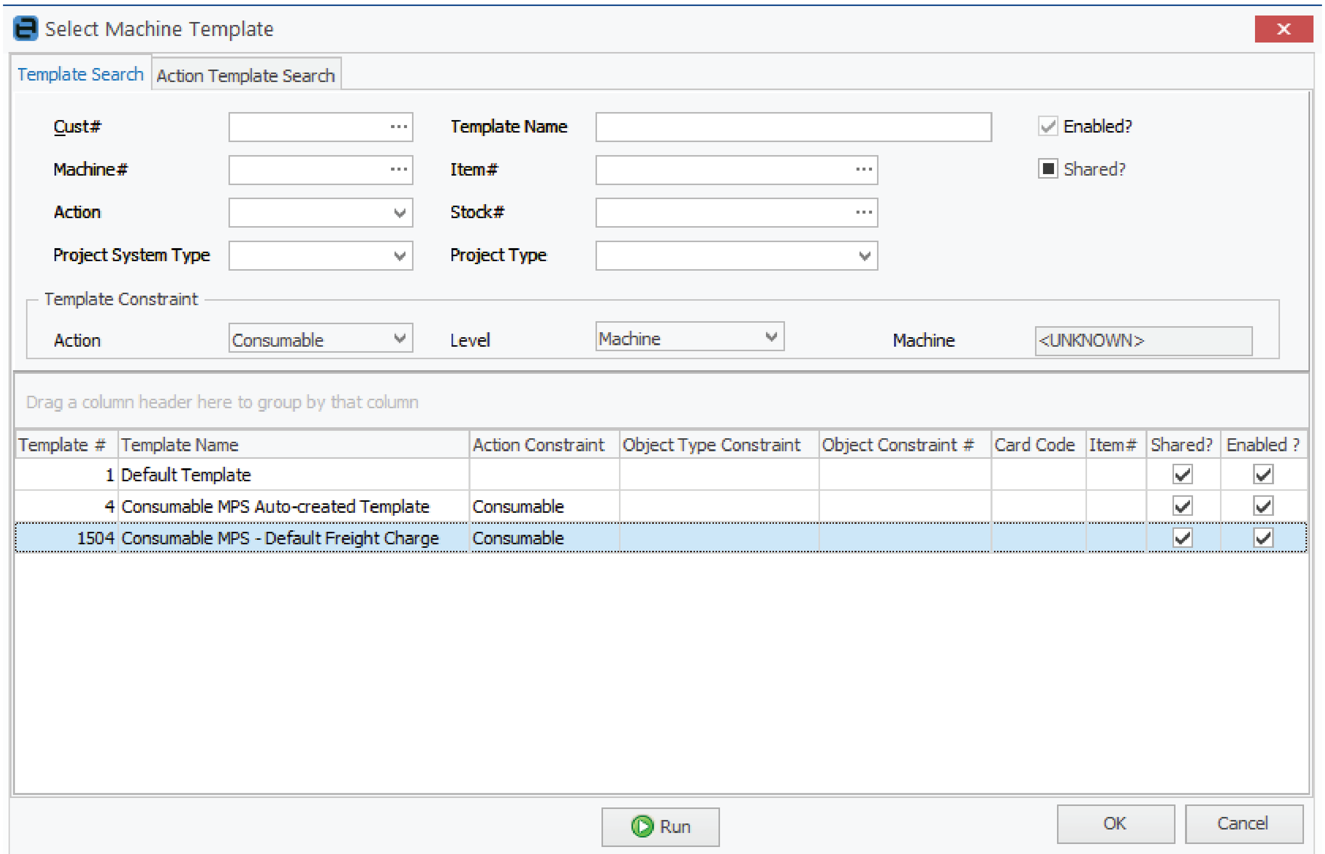
6. The ‘Change the Action Template Setup’ window is displayed. Select the appropriate option, which in this case is to ‘Change so that a different template is used in place of the existing template’, then click ‘Next’ to continue.



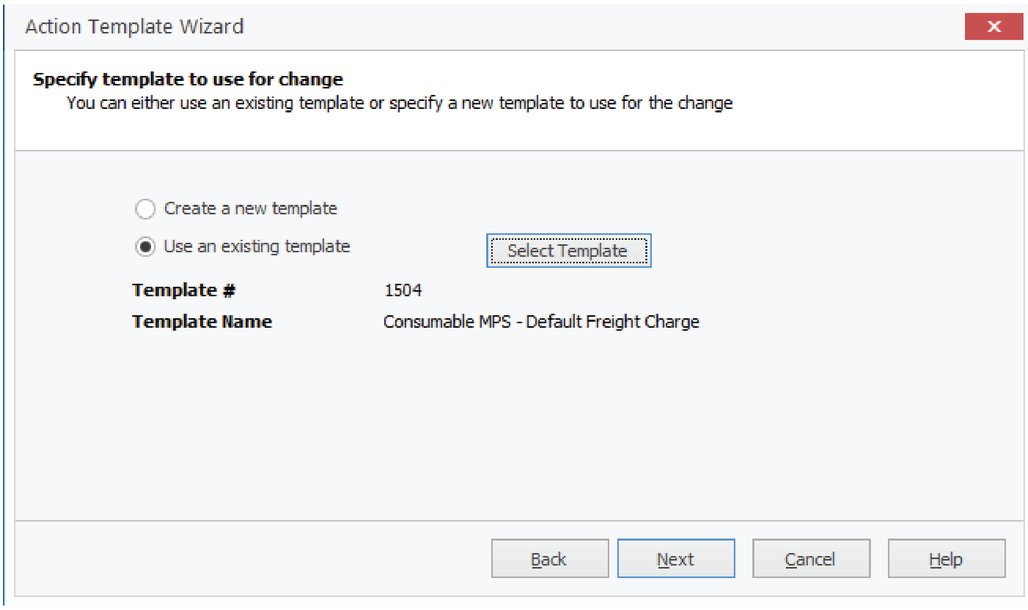
7. The ‘Specify template to use for change’ window is displayed. Select to ‘use an Existing template’, then click on the ‘Select Template’ button.



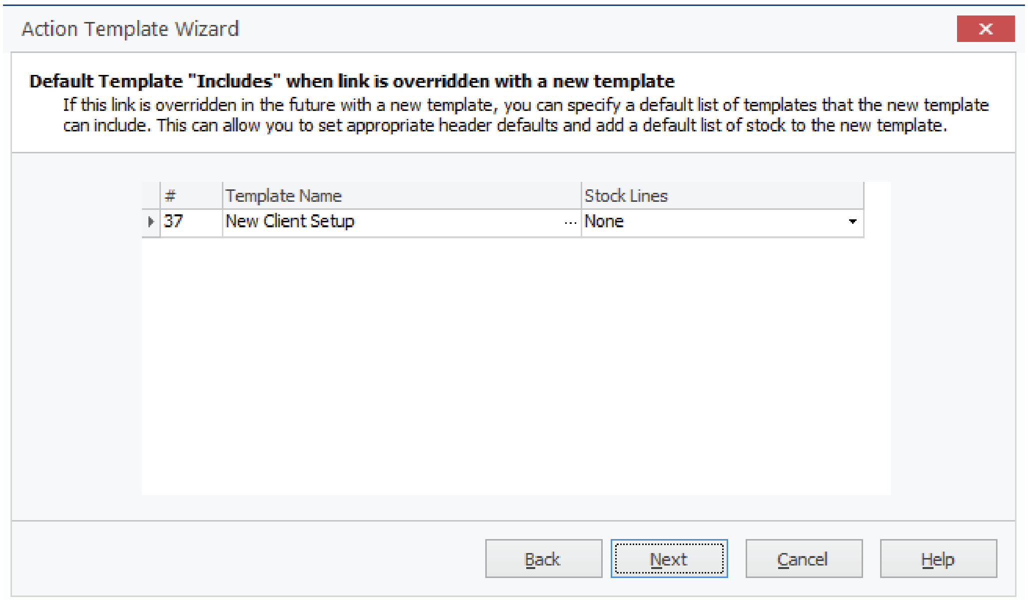
8. The 'Select Machine Template' window is now displayed where you can select the 'Consumable MPS – Default Freight Charge Template'. Select this, then click 'OK'.



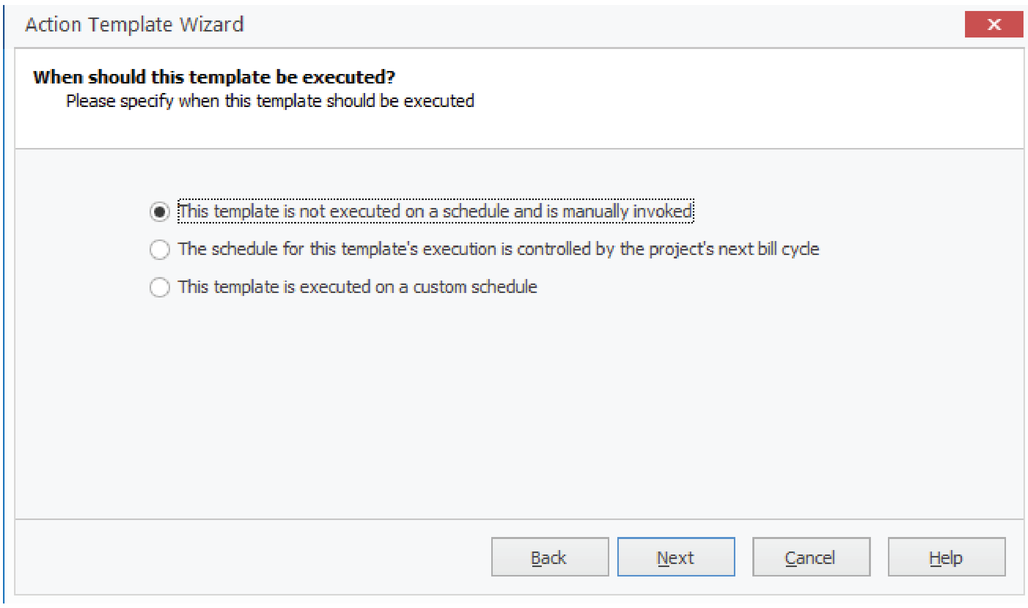
9. The 'Specify template to use for change' window will display to confirm your choice. Select 'Next' to continue.



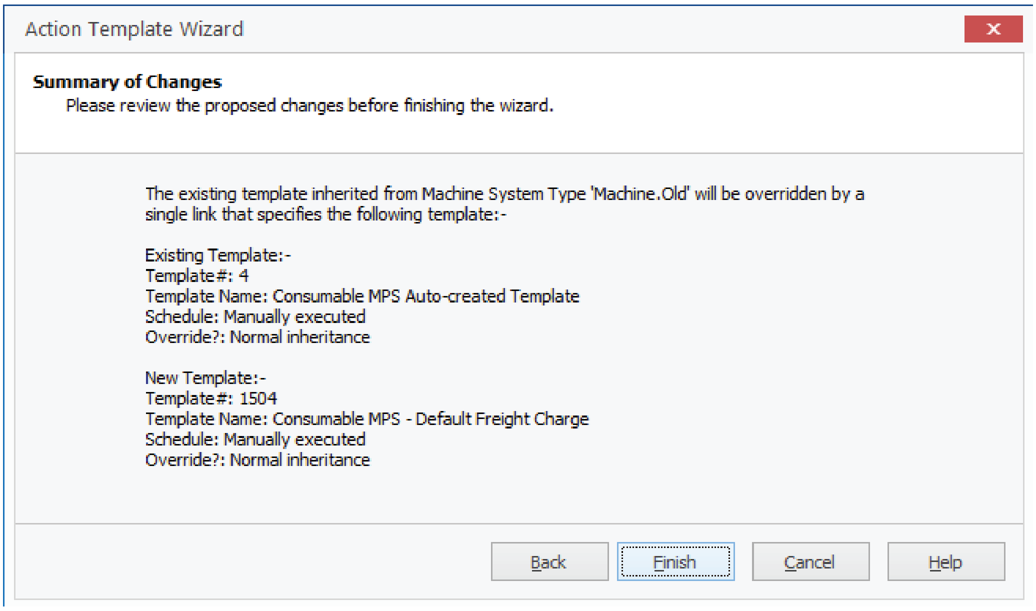
10. The 'Default Template "Includes" when link is overridden with a new template. If this link is overriden in the future with a new template, you can specify a default list of templates that the new template can include. This can allow you to set appropriate header defaults, and add a default list of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



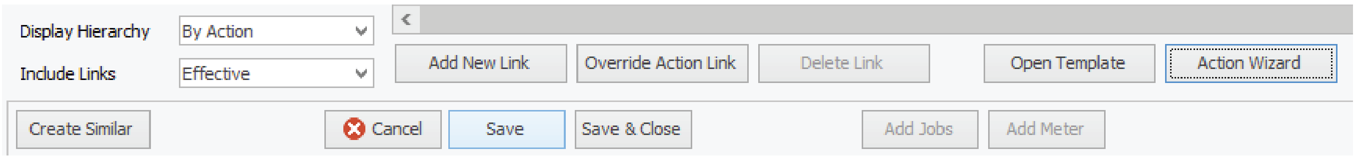
11. The 'When should the template be executed' window is displayed. Select the first option, which is used for manually executed templates, then click 'Next' to continue.



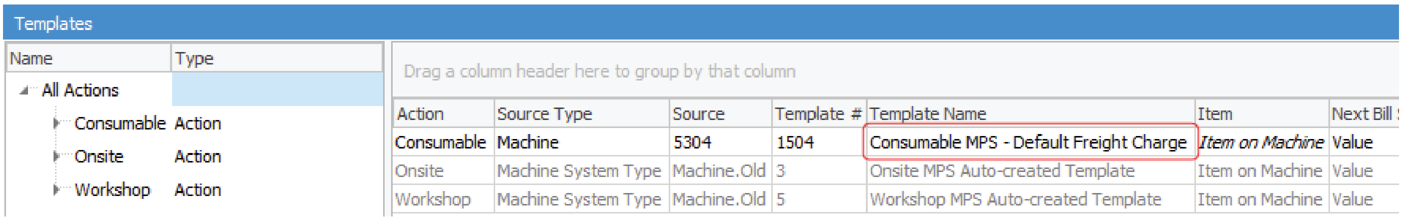
12. The ‘Summary of Changes’ windows is displayed, which confirms the changes that are about to be made. Select ‘Finish’.



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



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



Merge Templates

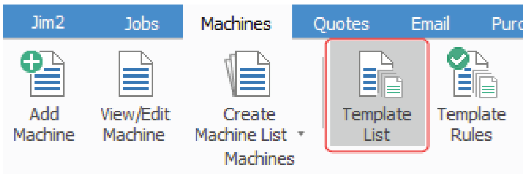
While the billing side of the MPS Edition has not changed, the new template concepts can be applied to MPS Edition for non-billing templates.

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

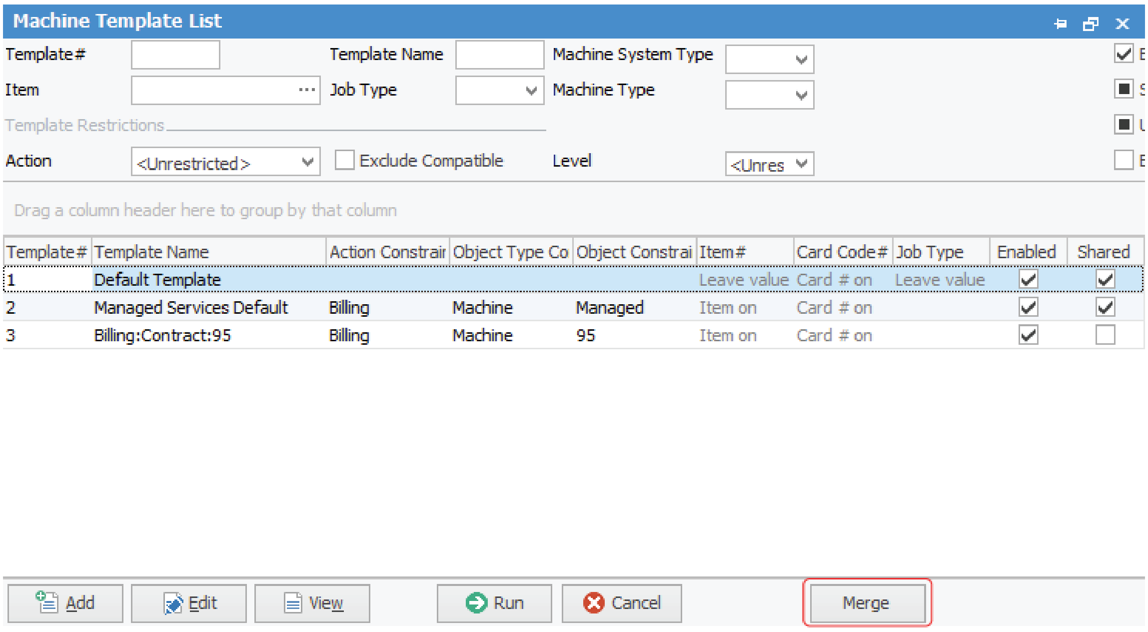
For those upgrading, machine specific templates will be created where stock associated to Consumable, Onsite and Workshop jobs are found in the Default Stock tab.

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

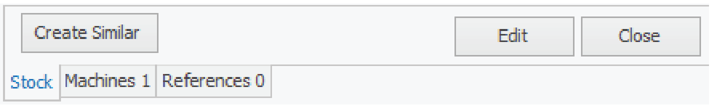
Go to **Projects (Machines) > Template List.**



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



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 – 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.

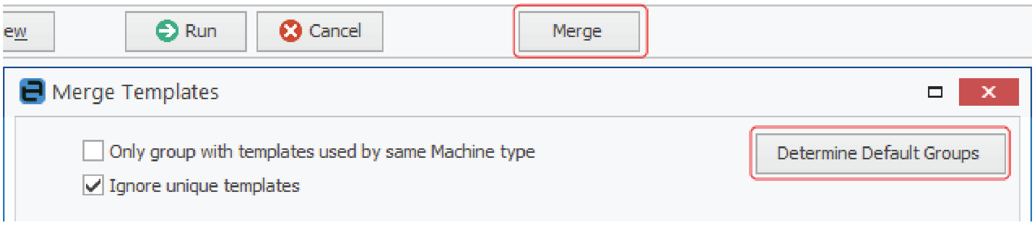
As an example of why we use the 'Merge' function, you may have added a freight charge to every machine contract in the Default Stock tab for use with Consumable jobs creation.

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 though 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.

Jim2® Mobile

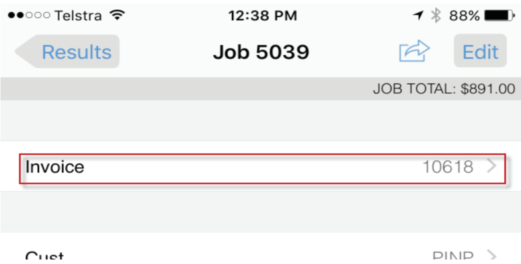
New Stock screen tabs

Prices, quantity on hand (also by attributes) and purchase statistics will become available when using Jim2 Mobile with a Version 4.1 Build of Jim2.

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.

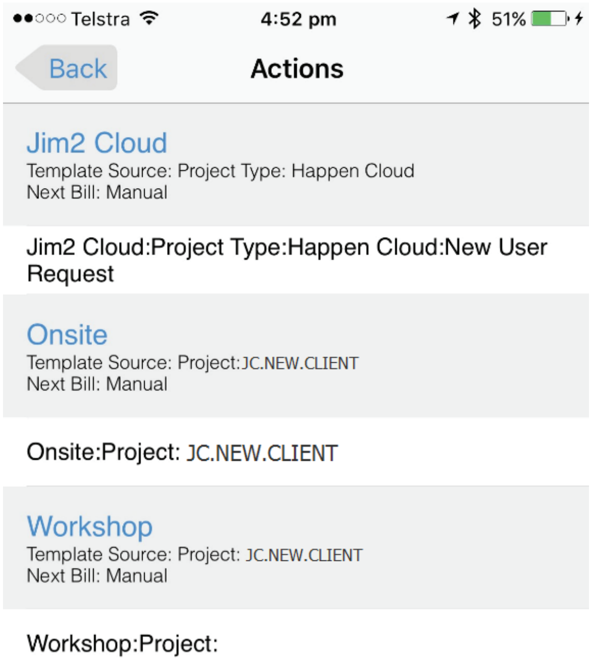


Ability to edit multicurrency on jobs and quotes

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

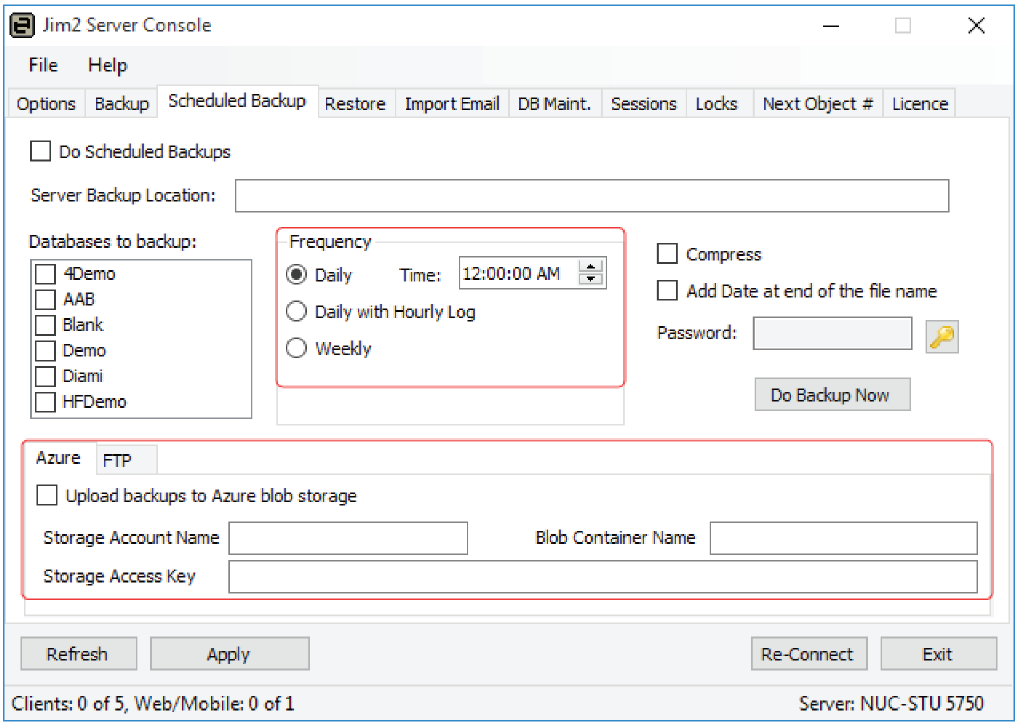
Now have the ability to add labour via timers to manufacturing jobs.

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.



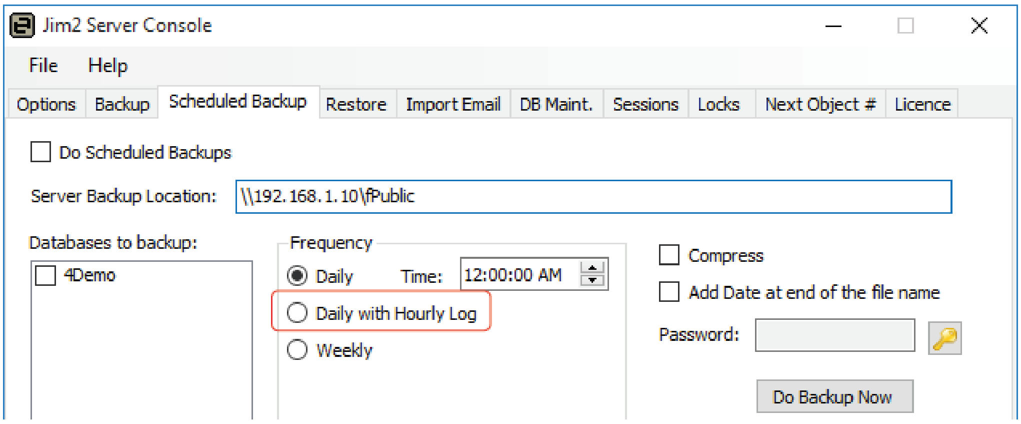
For detailed understanding and setup please refer to: http://jim2help.happen.biz/jim2_technical_knowledge_base_jim2_server_console_backup.html

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



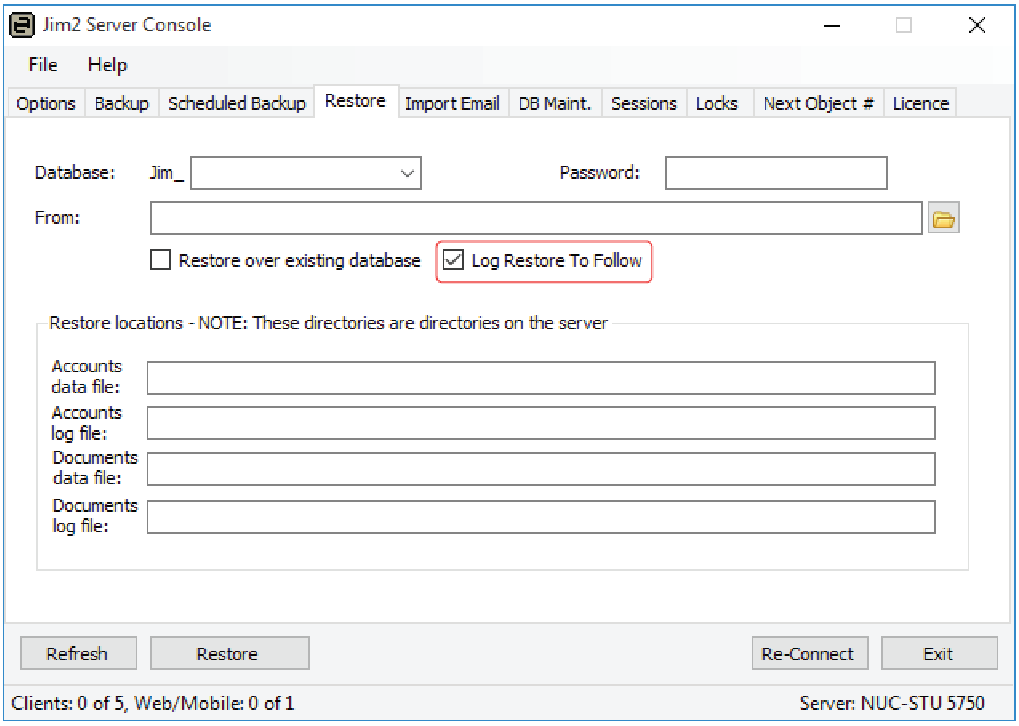
Once selected, Jim2 Server will perform a full backup at the time specified, and then hourly log backups will be performed every hour until the time to perform another full backup is reached.

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



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.

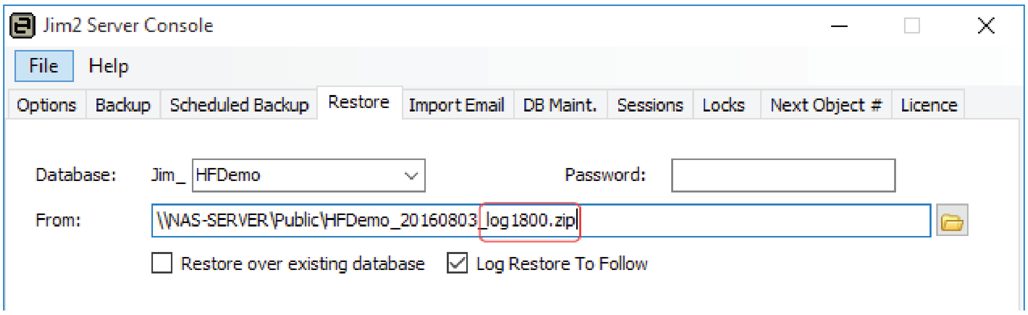
By selecting 'Log Restore To Follow' a special SQL restore is performed that informs SQL Server that additional incremental log backups are also to be performed.

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

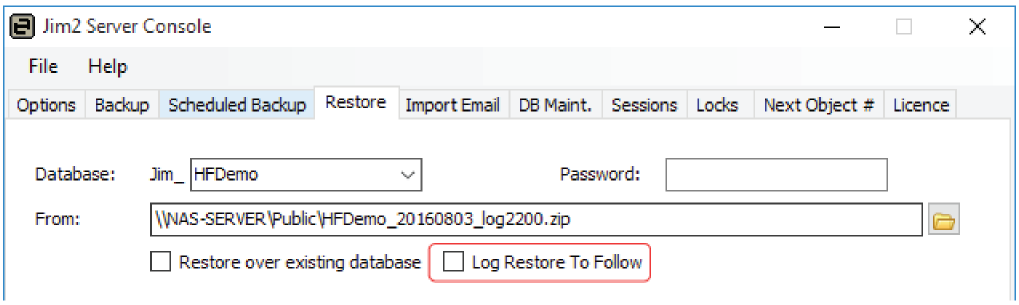
Step 2. Restoring the incremental log backups
You will cycle though the process of restoring each of the incremental backups in the order in which they were taken. Should you attempt to restore a log backup in the incorrect order, you will receive an error message and the restore will be aborted.

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.

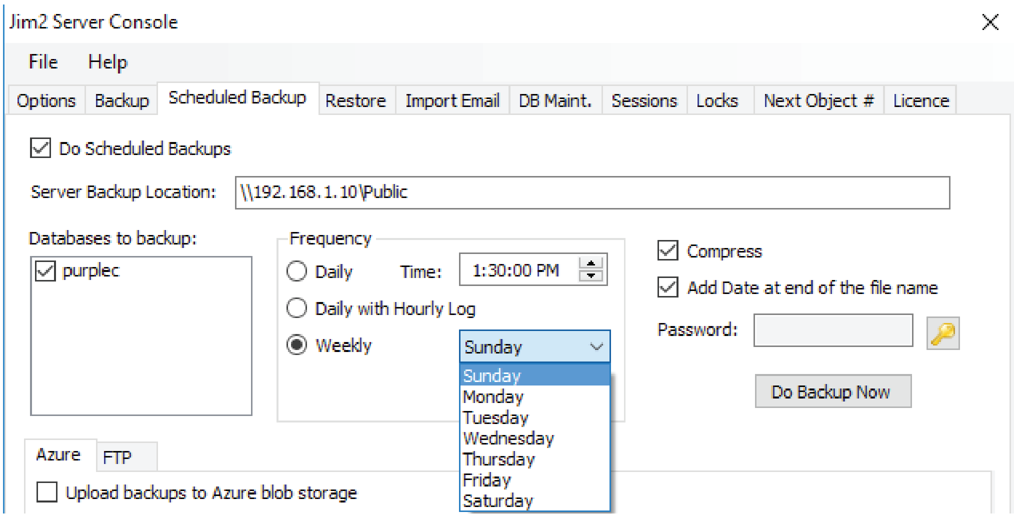


Step 3. Restoring the last of the incremental backups and finalising the restore
For the final restore, you will untick 'Log Restore To Follow', signalling to SQL Server that this is the last incremental in the chain you wish to restore. Continue with the final restore, and the process is then complete.



Weekly Backup

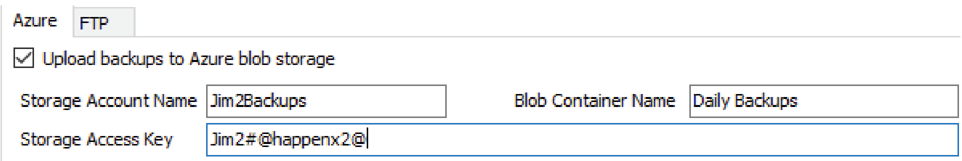
Where clients are running daily server image backups, we have introduced the option of weekly only scheduled backups. We stress that this option is only recommended for clients performing a reliable alternative daily VSS aware backup of the Jim2 databases.



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

Upload Azure option

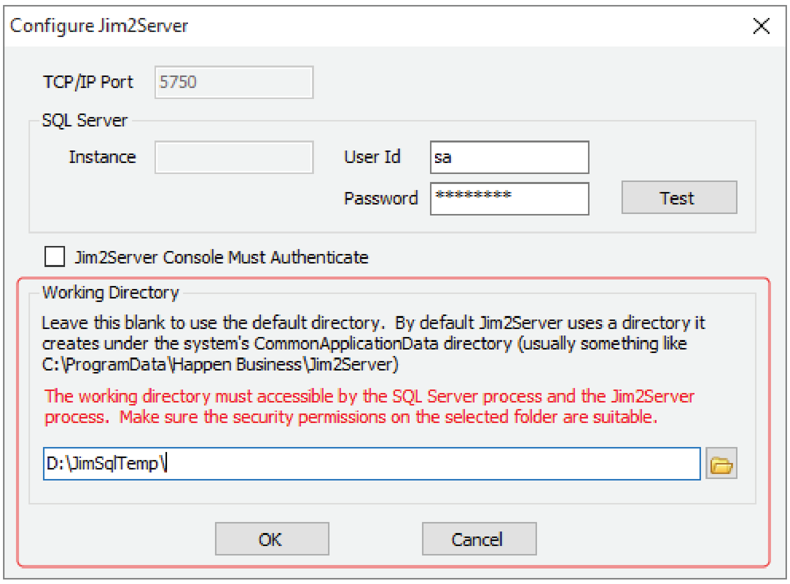
Adding to the existing ability to FTP an offsite copy of the database, you can now configure the successfully completed backup to be uploaded to Microsoft Azure blob storage.



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

Override working directory

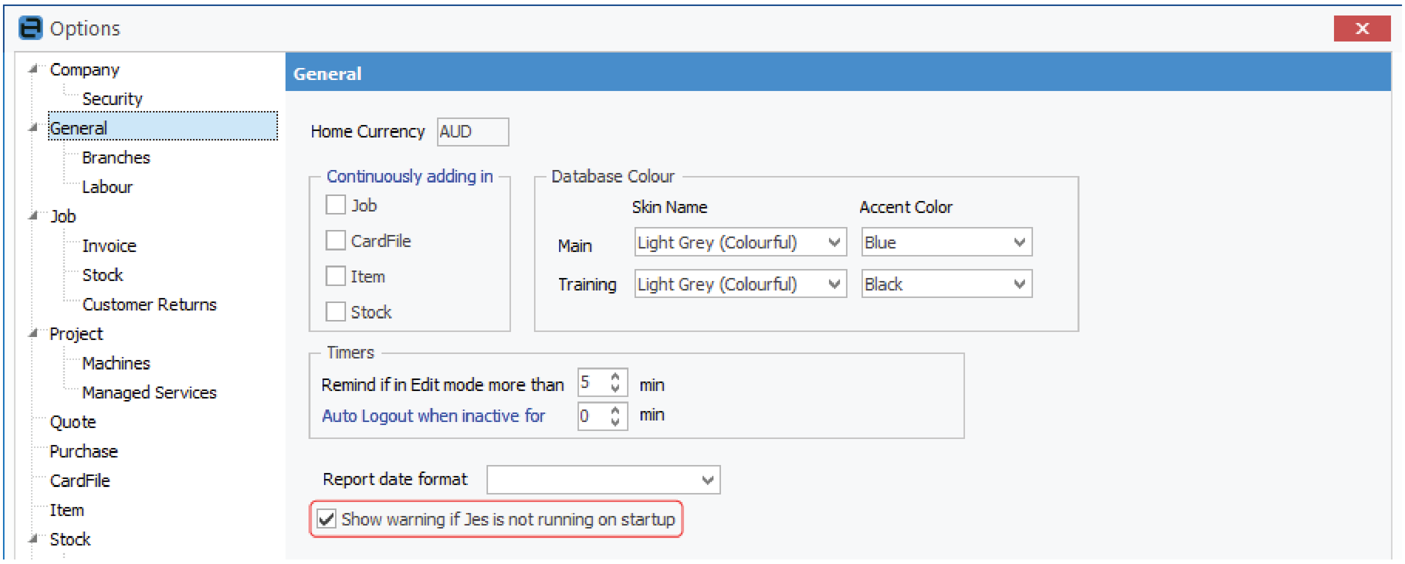
Configurable Jim2 Server temporary working (backup) directory. Launch Jim2 Configuration Manager, right click on the Jim2 Server and select Configure. Enter the directory you wish to use as per below.



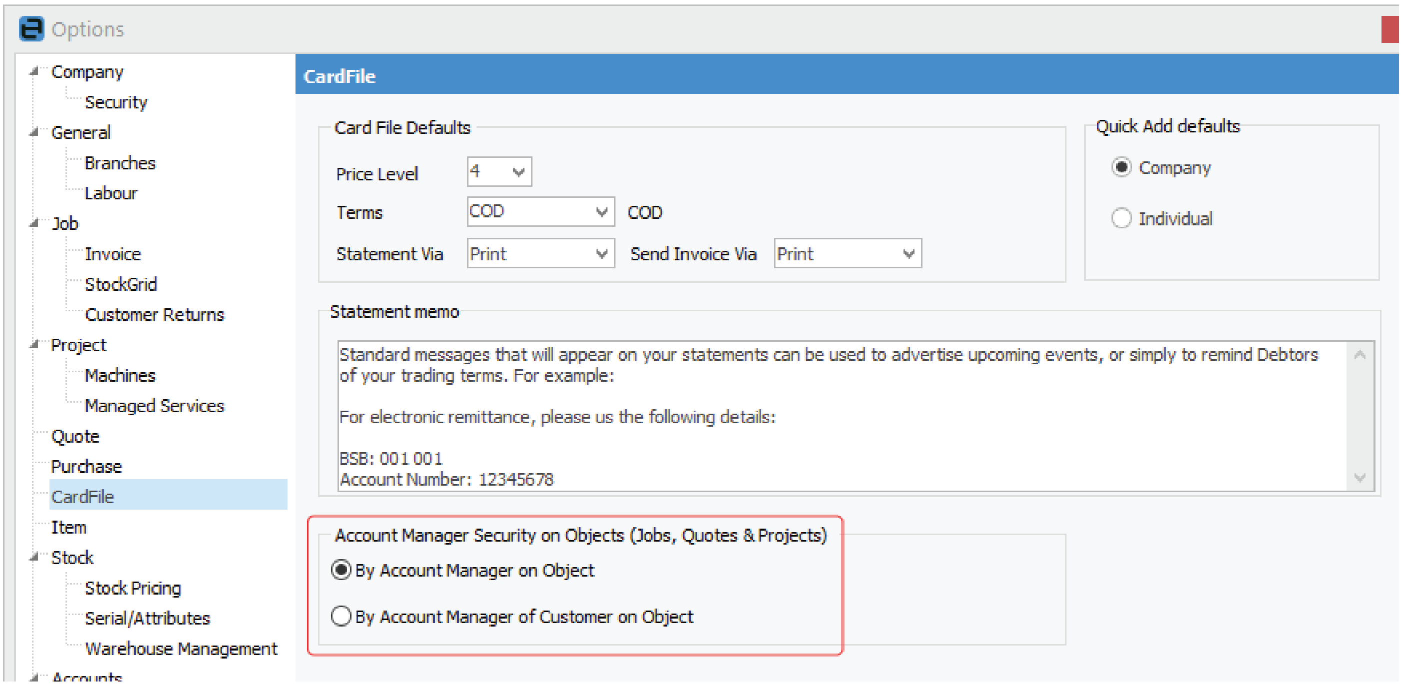
Options

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

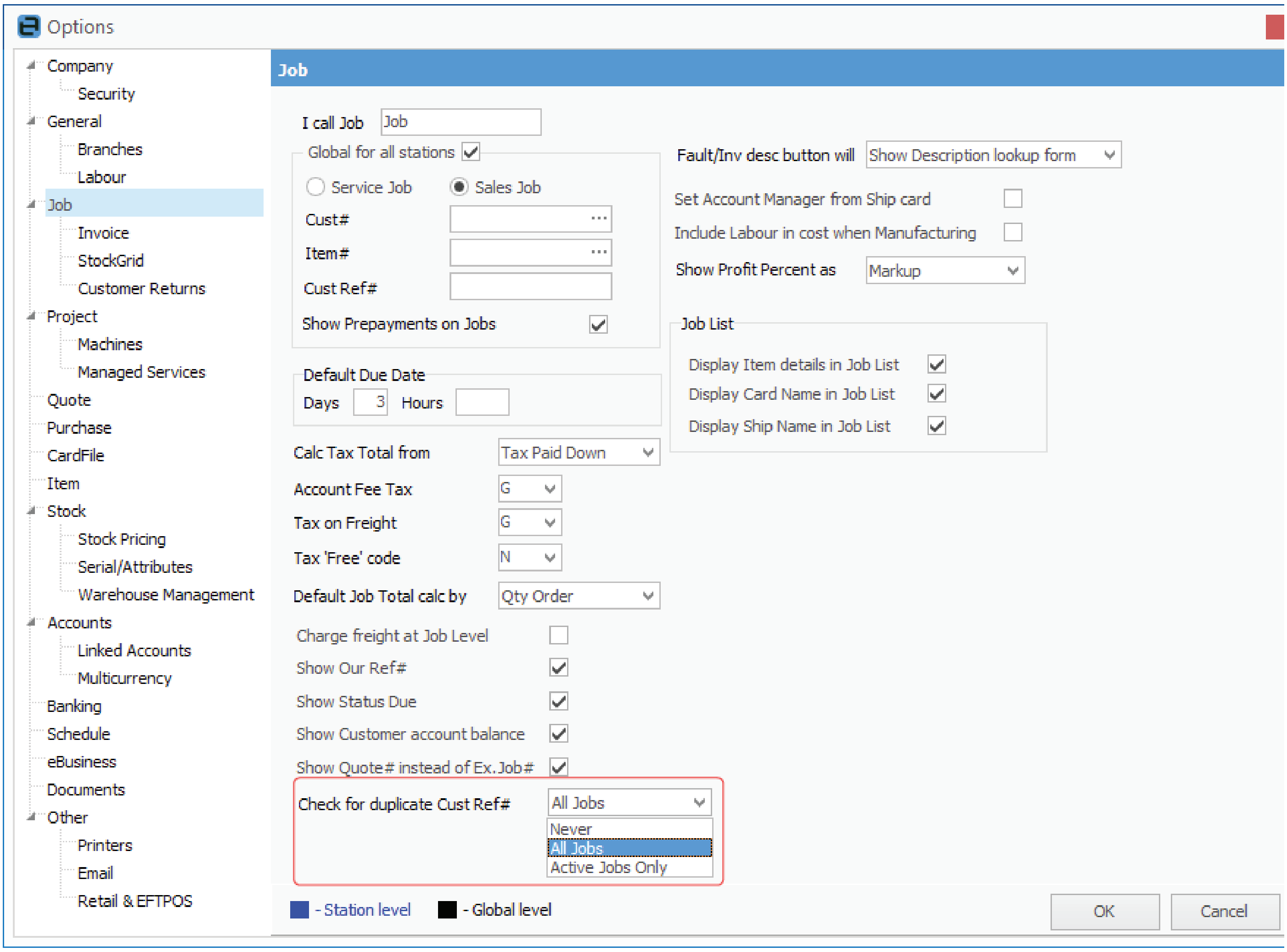
Show warning if Jes is not running on startup.



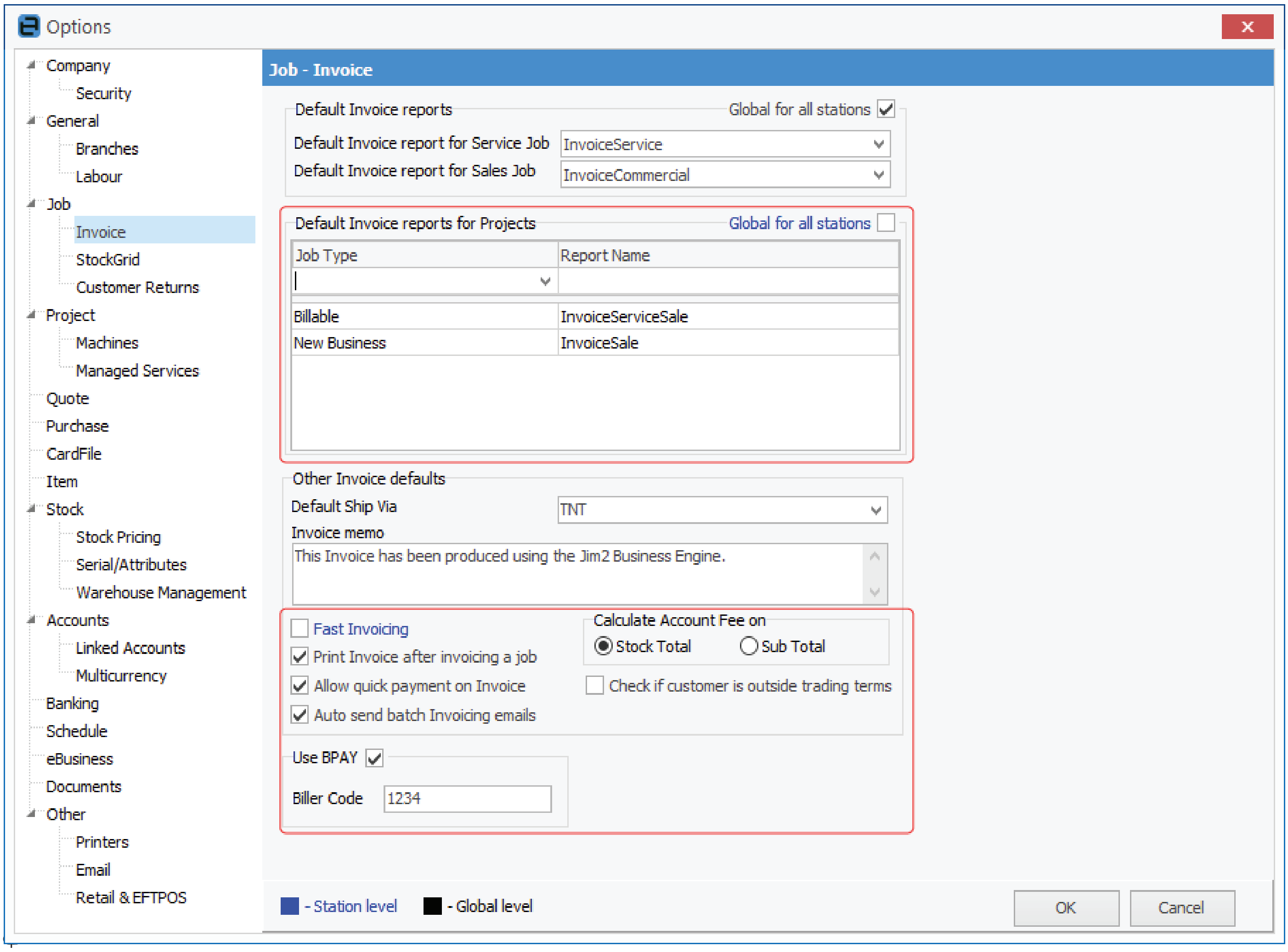
You can opt to view other account managers' CardFiles either by the account manager on the job, quote etc., or by the account manager of the customer on the job, quote etc.



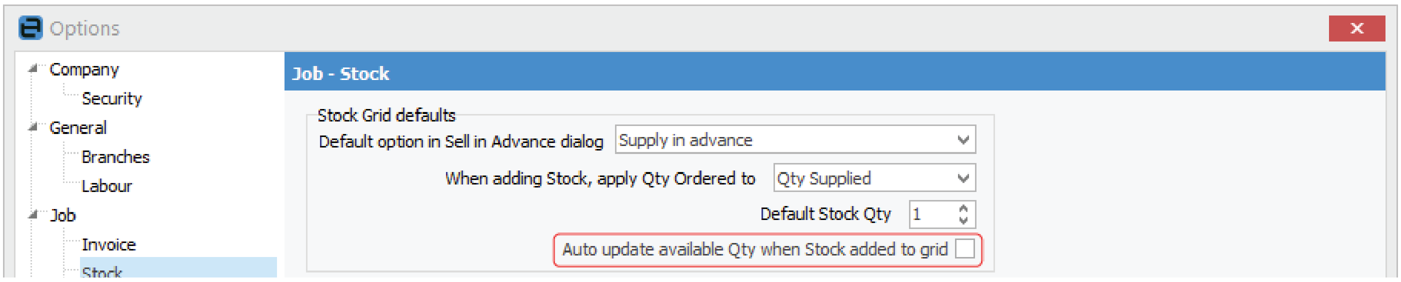
New options for checking for duplicate Cust Ref#.


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
Job
Global for all stations
Service Job
Sales Job
Cust#
Item#
Cust Ref#
Show Prepayments on Jobs
Default Due Date
Days
3
Hours
Calc Tax Total from
Tax Paid Down
Account Fee Tax
G
Tax on Freight
G
Tax 'Free' code
N
Default Job Total calc by
Qty Order
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#
All Jobs
Never
All Jobs
Active Jobs Only
Fault/Inv desc button will
Show Description lookup form
Set Account Manager from Ship card
Include Labour in cost when Manufacturing
Show Profit Percent as
Markup
Job List
Display Item details in Job List
Display Card Name in Job List
Display Ship Name in Job List
- Station level
- Global level
OK
Cancel

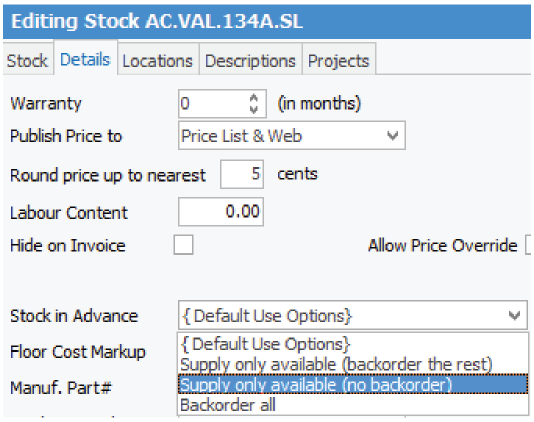
Default invoice reports and fast invoicing selections can now be set by Job Type.



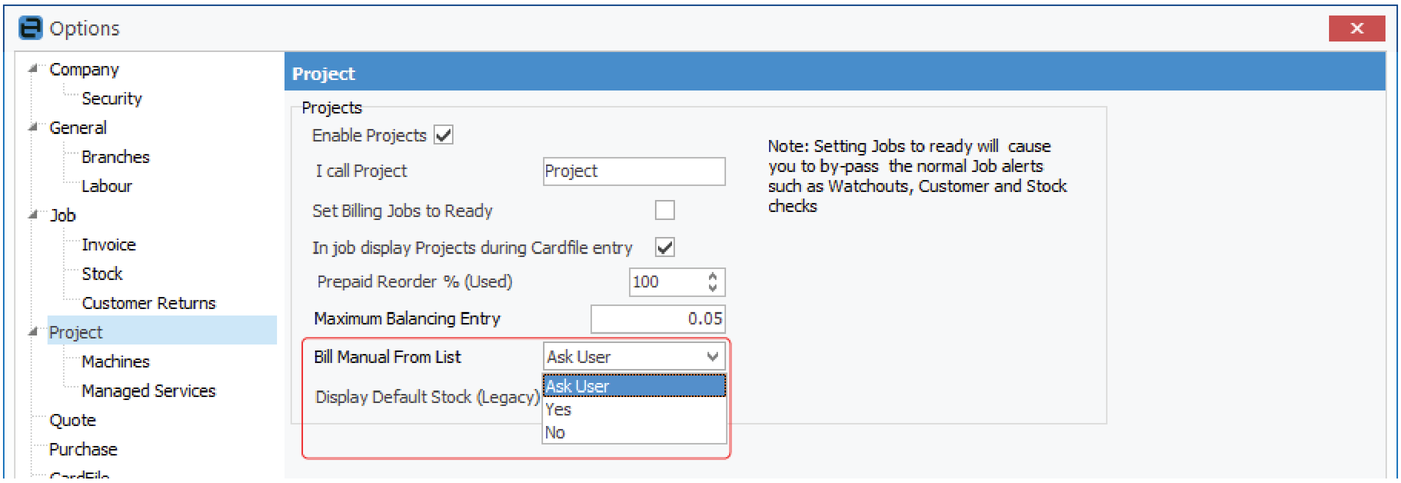
The default behaviour for the Stock in Advance dialog is controlled via **Tools > Options > Job > Stock**. This can also be overriden at a stock level, allowing for example, a specific stock is 'not' to be back ordered.



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

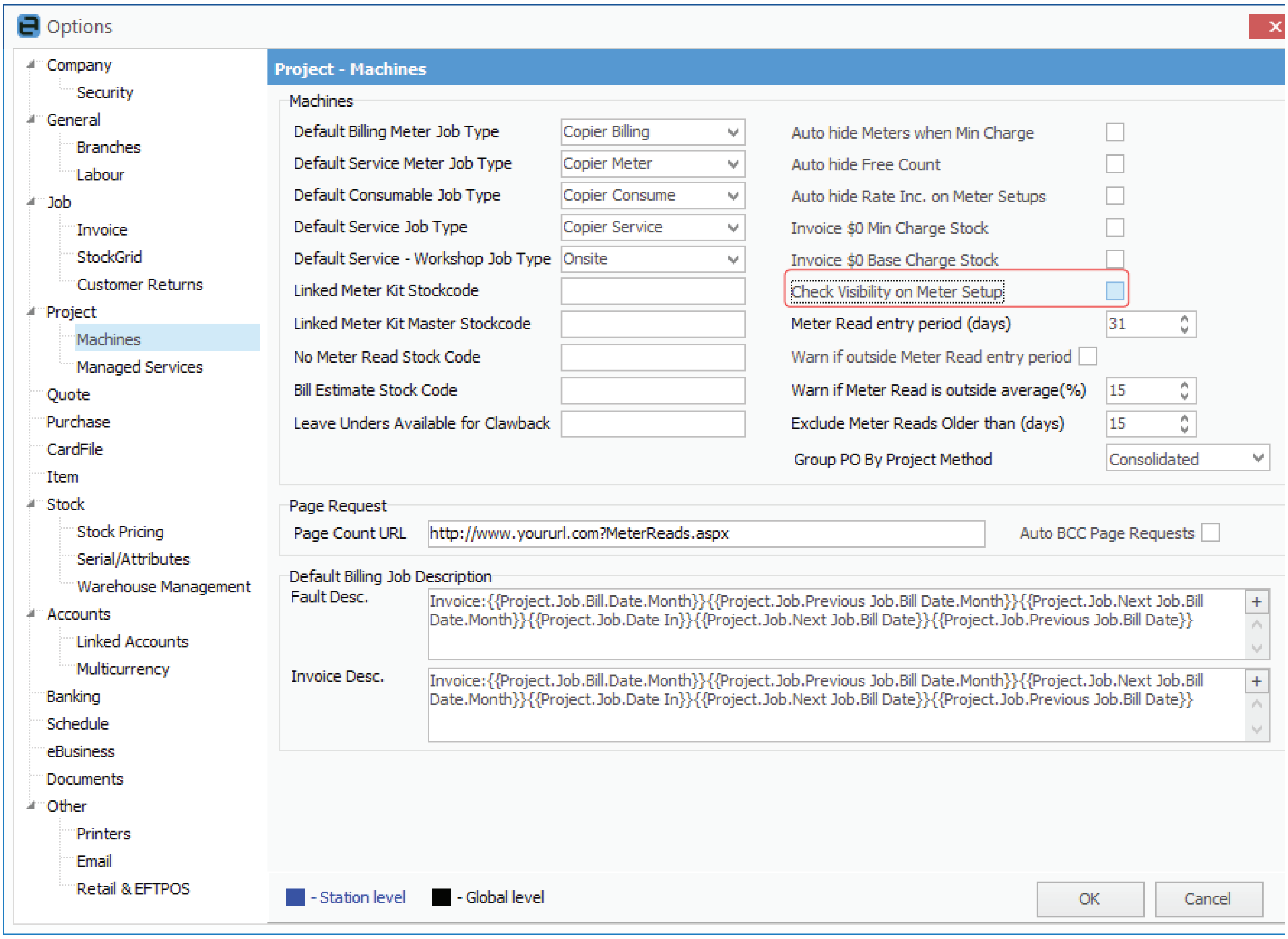


You now have the ability to bill or not bill projects manually from a list, or have a prompt that will ask the user each time.

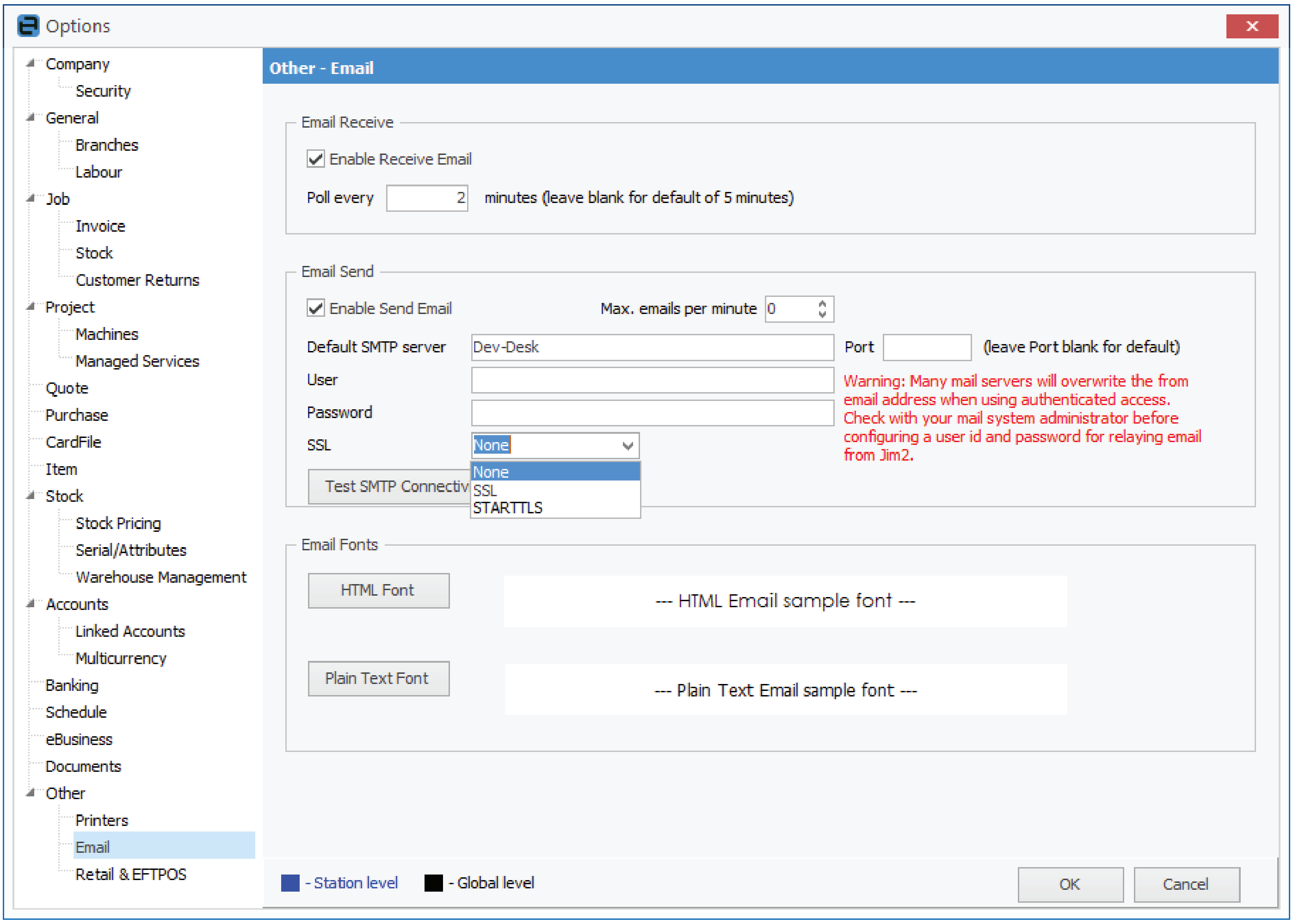


If ‘Check Visibility on Meter Setup’ is ticked, the overall rule says that if it is billable to the client at a non-zero rate, the charge should be visible – otherwise it should be hidden. This means:

- 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.



SMTP – SSL and STARTTLS authentication added to default SMTP options.

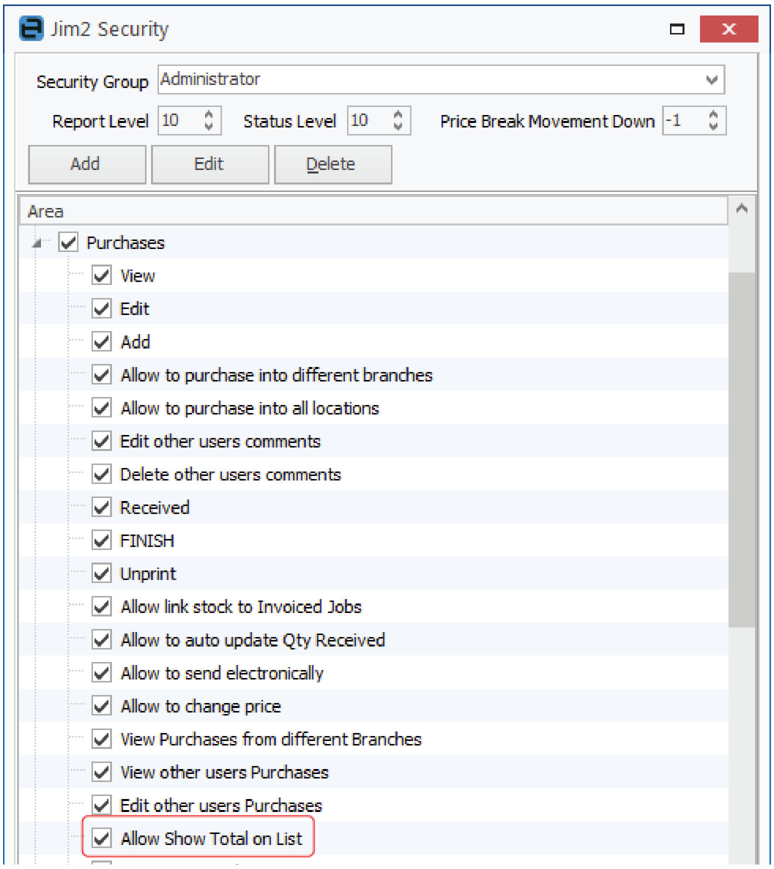


Security

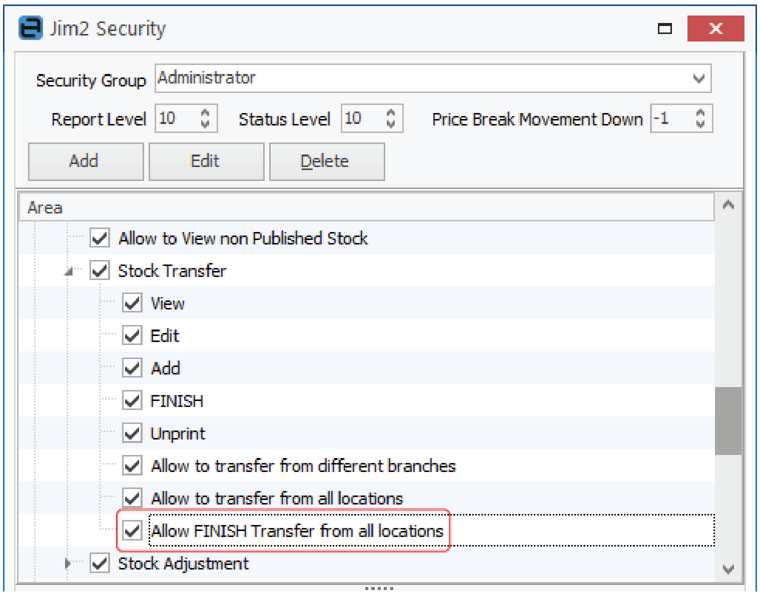
There are now two extra areas within the Jim2 Security screen. Other areas have been updated.

- Lists
- Templates

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



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.



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**: