Release Notes

Jim2® Business Engine
Version 2.19 (all editions)

Jim2® Business Engine V2.19 release notes – 28/07/08

Just a special note for all our new sites – welcome! These release notes should provide some insight into the sort of changes that are introduced during version upgrades, and how YOU can take advantage of them at your site. With easy to follow screen shots, look through each one carefully to see how they can add functionality to your site.

Official Release - Build 2524 with eBusiness.

Jim2 version 2.19 introduces many new features and enhanced functionality. Most significantly, Jim2 v2.19 includes support for trading fully electronically with your Customers and Vendors. To put it simply, it's fully eBusiness enabled.

On top of this, 2.19 includes enhancements to Stock selection including multi select and related Item Stock, Price Templates, additional Stock descriptions, enhancements to Notes, more search options, quick entry of Stock Attributes, Invoicing improvements, POS updates, importing General Journals, cleaner user interface, updated splash screens and logon, more Shortcuts, Scheduling improvements, new Options, Jim2 update, Jim2 Server and loads more...

Jim2® eBusiness Suite

In conjunction with the release of Jim2 v2.19 we are happy to announce the Jim2 eBusiness Suite which includes the following add-on products...

Jim2 eBusiness Connect   Trade electronically with your Suppliers, receive stock feeds, place electronic orders and more.

Jim2 eBusiness Supply   Trade electronically with your Customers, send stock feeds, accept electronic orders and more.

Jim2 eBusiness Service   Allow your clients and staff to add and check the status of Service Jobs via the web.

Jim2 eBusiness Link   Interface external programs, such as websites with your Jim2 data.

Jim2 to Jim2

It is quite common that companies using Jim2 trade with each other. Using Jim2 eBusiness Connect and Jim2 eBusiness Supply these companies can trade together fully electronically with minimal effort or cost.

For more information on any products within the Jim2 eBusiness Suite please contact your Happen Business consultant.

Jim2® Editions

Jim2 v2.19 is the first version that is available in different editions. The 'classic' version of Jim2 is now known as 'Jim2 Premium Edition'.

Jim2 Photocopier Edition

We have also introduced our first industry specific edition, Jim2 Photocopier Edition. This edition includes all the features of the 'Premium' edition with additional functionality and features enabled to handle businesses in the photocopier and office products industry.

So, in some respects, it would be fair to say that the industry specific Editions of Jim2 include functionality and features required for specific categories of businesses.

Jim2 Editions feature options that are either available, or included, by default in special editions. For example, Jim2 Photocopier Edition includes Scheduling and Kitting, along with Machine Contracts, Page Billing etc.

Features and Enhancements summary

Jim2 eBusiness *option* (page 4)

Jim2 eBusiness Connect will automatically bring in your Vendors' (Suppliers) price lists into your accounting system. Not only that, you will be able to view prices, descriptions, images and availability of all your Vendors stock.

Initially for the IT Industry, eBusiness Connect currently already connects with Ingram Micro.

The last piece in the puzzle is true electronic purchasing from within your accounting system.

NO MORE REKEYING ORDERS.

This means that you will be able to:

• Look up current Vendor pricing
• Stock availability
• Create Quotes
• Order Stock

All these daily business activities can be completed far quicker than ever before, as all your Vendor information is contained and updated from within your accounting system (Jim2). No longer are you wasting time looking up multiple websites, price lists and then rekeying any data that is associated with a sale.

If you would like to be electronically connected to your Vendors from within Jim2, contact Happen today on 02 9570 4696 to receive technical requirements.
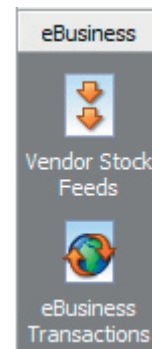
Core Functionality Enhancements

Price Templates (page 8)

Save time and administration effort by updating and maintaining selling prices using Price Templates.

You now have the ability to manage and update stock pricing at a group level rather than an individual level. By updating the template, all stock attached that template will be updated automatically.

Items - Auto Add and Related Stock (page 8)

Stock on Items have a new 'Auto Add' check box (default is checked). Stock with the 'Auto Add' checkbox checked will be added to a Job on Item change. This allows you to have stock 'related' to an Item, but not added by default to a Job.

Multi-stock Selection for Quotes and Orders (page 9)

We have now sped up the order entry process, whether it be a quote or a job. Jim2 now has the ability to add multiple stock and quantities whilst in the Stock Select screen. Rather than picking stock one at a time for a Quote or Order, select all your stock needed at the same time from one screen.
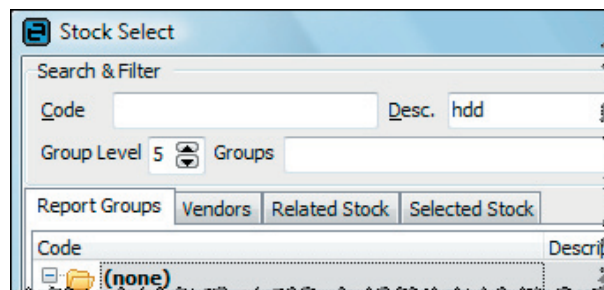
Stock enhancements (page 10)

A new tab has been added to the stock record which includes:

• Short description
• Long description
• Warranty Info
• Manufacturer codes
• UPC (Universal Product Codes)

Save time and hassle by including in your stock record all important and related information to that particular stock. No more searching for warranty terms, original part number or UPC Code. Due to high customer demand Jim2 now allows unique serial number tracking to be turned on or off at an individual stock level.

Stock Attributes quick entry (page 10)

Order entry has been sped up for stock attributes users, by allowing attributes to be entered by keyboard strokes as well as mouse clicks.

Notes enhancements (page 10)

Based on customer feedback, we now display Creditors / Debtors notes in the Cardfile Notes section.

Search enhancements (page 10)

The very popular Jim2 Search introduced in v2.18 includes the following enhancements...
Improved layout of search criteria.
New searching of Items and Item notes
New searching on Debtors and Creditor notes

Invoicing enhancements (page 10)

Batch Invoicing now allows selection of the Invoice date for the entire batch.

Point Of Sale enhancements (page 10)

Thanks to our retailers' feedback, the cash draw will not open if a payment was made at point of invoicing.

Payroll Integration (page 10)

For all clients using MYOB Payroll Enterprise, you can now import the payroll journal straight into Jim2, thereby reducing data entry errors and rekeying of journals by admin staff.

Updated User Interface, Shortcuts, Splash screens and Log On (page 11)

Cleaner user interface, new Refresh keyboard shortcut, updated Splash screen and Jim2 Log On.

New Shortcut key:

Alt F5   Refresh
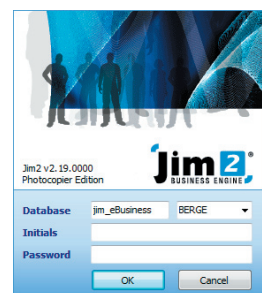
Scheduling updates (page 11)

Microsoft Office 2007 Style Navigation - You can now enable buttons that allow end-users to navigate to the closest preceding or subsequent appointment relative to the current view. If multiple resources are visible, navigation buttons are displayed for each individual resource.

New vertical scrolling tooltip support.

Banking enhancements (page 11)

Banking now displays Branch in Banking Session drop down.

Creditor enhancements (page 11)

Creditors now displays Vendor Inv# in payments view tab.

New Options and Security settings (page 11 & 12)

Cardfile: When adding a Cardfile you can now set default statement delivery method i.e. Print, Fax, email.
Purchase: A new default setting to guide you in Purchase Order entry has been added.
Stock: Unique Serial Number tracking can be turned on/off at a global or individual stock level for serialised stock.
Jobs: Show Cardfile name in Job list.

As with all new features there has been additional security checks added to accommodate all new features.

Jim2 Update enhancements (page 11)

Where before you had to run sequential upgrades (and not able to skip versions), from v2.19 onwards, you will be able to upgrade to the latest version of Jim2 using only one upgrade file.

Jim2 Server enhancements (page 11)

Jim2 Server has been updated to handle v2.19 including the 'documents' database. Vendor stock feeds and 'non accounts' related data is now stored in a separate document database (Jim_DatabaseName#Doc). This database is backed up and restored as part of your database. You can choose to backup only the accounts database if required.

Features and Enhancements detailed

Jim2 eBusiness option

Introducing Jim2 eBusiness - a completely new eBusiness option that enables full electronic trading with your suppliers. What is significant is that this is fully integrated eBusiness functionality as part of Jim2. Also, normally the costs and technical issues involved in doing 'eBusiness' is outside of reach of small to medium (3-150 user) systems. With Jim2, it is now easy and affordable.

eBusiness - Jim2 eBusiness Connect (back end)

The Jim2 eBusiness functionality is basically in two parts. The 'back end' is Jim2 eBusiness Connect. This enables, amongst other things, the automated stock feeds **from** your Suppliers and the sending of Purchase Orders electronically **to** your Suppliers. Jim2 eBusiness Connect typically runs as a Windows Service on your Jim2 file server. Jim2 eBusiness Connect 'logs on' via Jim2 Server but does not reduce your user count.

In summary, Jim2 eBusiness Connect allows you to:

Receive Electronic Stock feeds
Automated electronic Stock feeds from Suppliers with stock information including Stock Codes, Descriptions, Images, Pricing and Availability.

Send Electronic Purchase Orders
Instantly send Purchase Orders electronically directly to your Vendor, eliminating any re-keying and reducing errors.

Virtual Warehouses
See exactly what both you and your Suppliers have in stock, allowing quicker purchasing decisions based on both price and availability.

Realtime Stock Enquiries
Allows you to enquire as to the current price and availability in real-time (Vendor permitting).

Rules Management
Allows the creation and applying of an unlimited number of rules. Rules are applied upon receiving a Stock Feed or at any time. Typical uses of Rules include hiding stock or groups of stock that you do not wish to sell, automatic updating of prices for known stock, and much more.

For more information please refer to the **Jim2 eBusiness Connect** and **Jim2 eBusiness Suite** fact sheets.

eBusiness - Jim2 client (front end)

The 'front end' is what you see in the Jim2 client, and is what we will describe here.

You access eBusiness from the Sidebar or from **Jim2 > eBusiness** from the main menu.
Under eBusiness you will see two options, **Vendor Stock Feeds** and **eBusiness Transactions**.

Vendor Stock Feeds

Clicking on the Vendor Stock Feeds icon opens the Vendor Stock Feeds.

Across the top of the form you will notice several tabs: My Stock, All Suppliers, Selected Stock, and a tab for each Vendor you receive a stock feed from.

From this screen you can easily search for stock, pricing and availability for both your own stock and stock provided in feeds from one or more of your Vendors. A nice feature within Vendor Stock Feeds is the ability to see your own internal Stock (existing Stock in Jim2), Stock from a specific Vendor, or Stock from multiple Vendors, in a consistent manner. This allows you to search both your own stock and your suppliers stock at the same time. You can even see the availability across multiple Vendors, as in, I have 5 in stock, Vendor A has 100, and Vendor B has 50, and at what price.

Note: The recommended minimum screen resolution for Vendor Stock Feeds is 1280x1024.

Product Tree

On the left hand side you see the Product Tree. This tree is based on the Stock grouping supplied in the feed from your Vendor. In the case of My Stock, the grouping is based the Stock groups within your own Stock. Clicking on stock group within the tree displays stock within that group in the Stock grid.

You can choose to 'Show all Stock with group' by ticking the checkbox at the bottom the Product Tree. When ticked, all Stock within the selected group, and any Stock in groups below this group will be displayed.
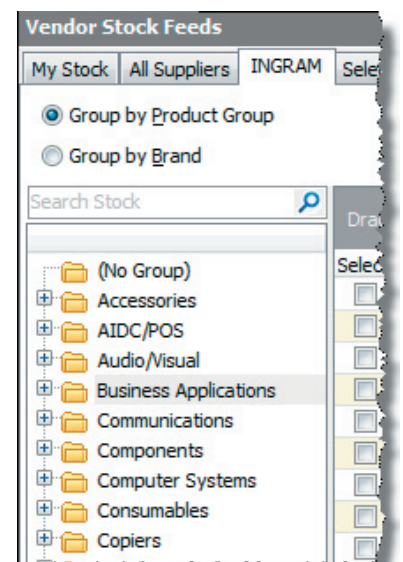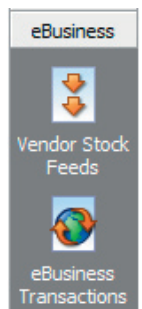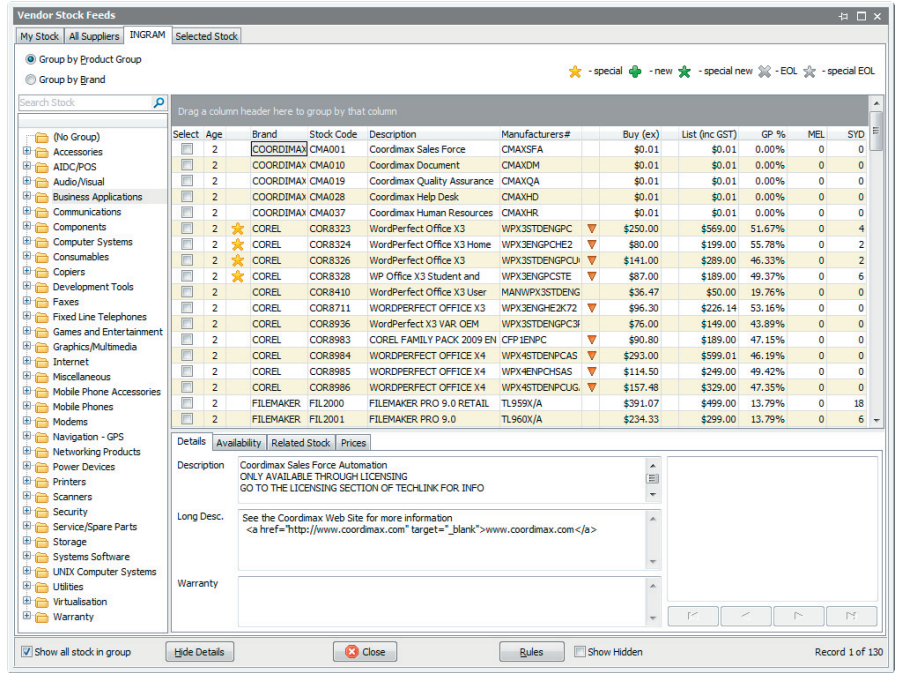
By Product Group or Brand?

Above the Product Tree are the Product Group and Brand radio buttons, with Product Group selected by default. This allows you to choose how you wish to display the Product Tree, by Brand then Product Groups, or simply Product Group. Either way the Brand is displayed in the Stock Grid.

Searching Vendor Stock Feeds

Directly above the Product Tree is the Search box. To search Vendor Stock, simply type the text that you want to find into the Search box and click the Search icon (or press Enter).

The Stock grid will display the results of your Search. By default all Search results will be displayed, but you can drill down by clicking within the Stock grouping displayed within the Product Tree. To clear the search, click the Clear icon or enter a new Search text and click the Search icon.

Stock Grid

The Stock Grids displays the following information:

Column	Description
Selected	Selected allows you to 'select' stock that you are interested in. Once ticked, the Stock line will appear green, and the selected stock will appear in the Selected Stock tab. You can select stock from several Vendors at the same time, with all displaying in the Selected Stock tab.
Age	The Age column shows how many days since that particular line of Stock has been updated by a vendor stock feed. For example '1' indicates that this stock information is 1 day old, or was updated yesterday.
Stock Status	The next column displays the 'Status' of the stock as per the legend (Special, EOL etc)
Vendor	Vendor displays the CardCode of the Vendor this information is from (All Suppliers and Selected Stock tabs only)
Stock Code	The Stock Code your Vendor uses to identify this product
Description	Vendors Stock description
Manufacturers#	The Stock Code the Manufacturer uses to identify this product
Buy Price Indicator	This column indicates if the Buy price on this Stock has decreased/increased in the last X days (as set per Options)
Buy Price	Vendor Buy price (ex or inc as per Options)
List Price Indicator	This column indicates if the Vendor's List (or RRP) price on this Stock has decreased/increased in the last X days (as set per Options).
List Price	Vendor List (or RRP) price (ex or inc as per Options)
GP%	The Gross Profit percentage margin (Buy ex vs List ex)
Availability	One or more columns displaying how many the Vendor has in stock per warehouse

Note: Clicking the Refresh button (ALT F5) will refresh the Stock Grid.

Stock Details tabs

Directly beneath the Stock Grid are the details for the currently active Stock:

Tab	Description
Details tab	Displays Description, Long Description, warranty details and stock picture (if supplied by vendor feed)
Availability tab	Displays stock's availability for all Vendors and warehouses, and your stock (stock you have in stock)
Related Stock tab	Displays any related stock (if supplied by vendor feed)
Prices tab	Displays current and previous Buy and List prices (ex or inc as per Options) and 'effective' date. Effective date is the date that this current Buy/List price became effective. This tab also displays GP% and promotional start/end dates.

Linked stock

When a feed is processed by Jim2 eBusiness Connect, existing Stock (within Jim2) will be automatically linked based on either Manufacturers Part# or Vendor/Vendor Part# (as per Vendor tab on the Jim2 Stock).

Linked stock displays as blue within the Stock Grid, and by right clicking you can view the related Stock within Jim2.

You can link the same Stock from several Vendors to one Stock Code in Jim2, in the case where you purchase the same stock from different Vendors.

In the case when Stock in a vendor feed already exists in Jim2, but has not been automatically linked, you simply right click on the stock within the Stock grid, and select 'Link to Jim2 Stock'.

Creating Stock in Jim2 from Vendor Stock

Vendor stock is Stock you 'know about', but to use Vendor stock on Quotes, Jobs, Purchase etc within Jim2 you need to first create it within Jim2.

You can create an individual stock from any Stock feed tab by right clicking on the desired stock and selecting '**Create Jim2 Stock**'. The Stock will automatically be created (in Add mode) as a Virtual stock type, ready to be used in Quotes, or you can change the stock type to Depleting, and select a Stock GL Group and serial# tracking if required. As much information as available will be copied from the information in the Vendor stock feed, including updating the Stock's Vendor tab, and the Stock will be automatically linked.

Multiple Jim2 Stock can be created at the same time by right clicking and selecting '**Create all Jim2 Stock**' from the Selected Stock tab.

Selected Stock tab

The Selected Stock displays all stock that is currently selected (from any Vendor tab). The idea here is that you can browse and select several stock from several Vendors (perhaps for Quoting purposes) and then from the Selected Stock tab, right click, create all the Stock as Virtual within Jim2, and then simply right click again and select either '**Create Quote**' or '**Add to existing Quote**'.

If the stock in Selected Stock is linked (blue) and not a Virtual stock type, you can right click and select either **'Create Job'** or **'Add to existing Job'**.

Selected Stock will stay as 'Selected' until unticked, even if you exit Jim2, and therefore can also be used to keep an eye on specific Stock. The selected stock is user specific, that is, it is the stock you have selected, regardless of other Jim2 users.

eBusiness Rules

Jim2 eBusiness allows you to create Rules to be applied either upon receiving a Vendor Stock feed, or on demand. You can create as many Rules as you wish, define to which stock or group of stock the rule applies, and what the rule does.

For example, your vendor may supply goods from a particular Manufacturer that you do not wish to sell or display within your Vendor Stock Feed. You can easily create a Rule that 'Hides' all stock in Vendor Feed X, which are Brand Y. This does not delete the stock from the vendor feed, simply flags not to display. In fact, you can tick the 'Show Hidden' tick box at the bottom right of the Vendor Stock Feed screen to see what stock has been affected by this rule.

Creating Rules

You can create a rule by either right clicking on a Stock and selecting 'Create Rule' or clicking the Rules button located at the bottom right of the Vendor Stock Feed screen, and then clicking Add from the Rules List.

Creating a Rule is fairly straight forward. On the left side of the Rule form add the criteria to which the Rule applies. For example, which Vendor, Brand, Product Groups or specific Vendor Stock Code. Select the Rule's 'Precedence', which is the order that this Rule will be applied (lower numbers get applied first), and if you wish to Hide the Stock from the Vendor Stock Feed.

On the right side of the Rule form select what to do to Linked Stock in Jim2 when this Rule is applied. For instance you may wish to automatically update the List price in Jim2 when the Vendor changes their List price in the feed.

Example use of Rules

Updating List prices

When a Vendor Stock Feed is received and processed the List price (or RRP) on linked stock in Jim2 is not automatically updated by default. You can create a simple rule to automatically update the List price as follows:

- Create a new rule
- Set Vendor to the Vendor you wish to base your List price on
- Tick 'Update List price'
- Save your new rule

The next time you get a feed from this Vendor, this rule will be applied, and the List price (and any pricing based on List price) will be automatically updated.

Hiding Stock

When you receive a feed from your Vendor it typically contains all products that Vendor sells. They may sell ranges or brands of products that you are not interested in selling. In this case you would create a rule to hide these products, and they would not be displayed. The products are still there, they are simply marked as hidden.

- Create a new rule
- Select the Brand or Product Category of stock you wish to hide
- Tick 'Hide'
- Save your new rule

You can display hidden stock by ticking the 'Show Hidden' checkbox located in the bottom left of the Vendor Stock Feeds form. To hide multiple brands or categories of stock, simply create multiple rules.

Updating Stock details

If you want the stock descriptions for Stock in Jim2 to be automatically updated based on your vendor stock feed you can create a rule as follows:

- Create a new rule
- Select the Brand or Product Category of stock you wish details to be updated
- Select the details (Stock Description, Warranty details etc) you want to be automatically updated
- Save your new rule

If this was the case, any List price you set in Jim2 would change the next time a feed is processed. If you were receiving vendor feeds for the same product from multiple vendors the List price would change every time time you get a feed.

eBusiness - Options

Options has been updated to include default Options related to eBusiness.

From the main menu **Tools > Options > eBusiness**

| eBusiness Option	Description
Default Price Template	When creating Stock in Jim2 from Vendor Stock Feeds use this Price Template
Indicate prices changes in days	This is the number of days the price change indictors in Vendor Stock will be displayed. So upon receiving an update where the Buy or List price has changed the price change indictors will display for X days.
Show Buy Price	Show Buy Price as either Ex or Inc GST
Show List Price	Show List Price as either Ex or Inc GST
Show GP% as	Show GP% as either Margin or Mark up
Show all Stock in Group	Default setting for the 'Show all Stock in Group' checkbox in Vendor Stock Feeds.

eBusiness Transactions

eBusiness Transactions allows you to view eBusiness Transactions that have been processed or are currently being processed.
You can access eBusiness Transactions from the Sidebar under eBusiness or from Jim2>eBusiness from the main menu.

Across the top the form you see two tabs, InBound Queue and OutBound Queue.

When eBusiness Transactions take place, for example when an electronic Purchase Order is placed on a Vendor, it is put into the OutBound eBusiness Transaction queue. It is then processed by Jim2 eBusiness Server, and attempted to be delivered to your Vendor. If this failed for some reason (internet down for example), the transaction will remain active in the queue and later retried.

By Default only unprocessed transactions are displayed. Click 'Include Processed Transactions' to view all eBusiness Transactions.
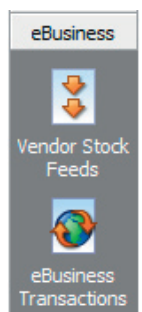
Note: New Security setting: Security > eBusiness - View

Electronic Purchase Orders

Automatically send Purchase Orders from Jim2 straight into your Vendor's ERP system - without any rekeying.

Electronic Purchase Orders Setup

To enable a Vendor for Electronic Purchase Orders, open their CardFile, click on the Vendor tab, click 'Enable Electronic Send', and click the Setup button.

The 'Electronic PO Parameters' form will then be displayed. Select the 'Transport Mechanism' and enter the required parameters. The Transport Mechanism depends on what is required for that specific Vendor, assuming of course that the Vendor is capable of accepting Purchase Orders in electronic format. The parameters required will vary depending on the Transport Mechanism selected. Typically things like User Name, Password, Default warehouse, web address or URL etc.
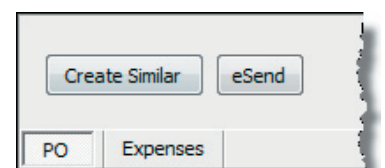
Note: New Security setting: Security > CardFile - Set up Vendor for electronic POs

Sending Electronic Purchase Orders

Sending Electronic Purchase Orders (ePO) is easy. If a Vendor has been configured to accept ePOs, a Purchase Order to that Vendor (From#) will display the 'eSend' button. Simply click this button to send. A warning will appear if the ePO has already been sent.

Note: ePOs use the Vendor Stock code and Buy Price from the Stock's Vendor tab, overriding the default set in Purchase Options. The details on the Vendor tab are automatically updated when a Stock Feed is processed, and are assumed to be correct. When sending an ePO, Jim2 will verify the following details from the Stock's Vendor tab:

- Vendor's CardFile# is available (matches 'From#' on ePO)
- Vendor's Stock code is not blank
- Vendor' s cost matches buy price on ePO
- Last updated date is current

Note: New Security setting: Security > Purchases - Allow to send electronically

Price Templates

Price Templates is a new feature that allows you to base the Price Levels on Stock using a Template, rather than having to maintain the pricing at an individual Stock level. For example you may create a Price Template called Monitors and base the pricing of all your Monitor stock on that Template. The really nice thing is that if you change the Monitor Price Template, all stock using that Template will be automatically updated.

Adding a new Price Template
From the main menu **Tools > Setups > Price Templates**, click Edit.

Enter the Name you wish to call your new Price Template and the Price Levels related to this template along with the Price Calc Method you wish to use.

Editing an existing Price Template
From the main menu **Tools > Setups > Price Templates**, select the template and click Edit.

Note: Any Stock that bases its pricing on this Price Template will be automatically updated.

Using Price Templates
To use a Price Template on a Stock, edit the Stock, click on the Prices tab, and select the desired Pricing Template.
Any existing Price Levels that conflict with the template's Price Levels will be overridden. Price Levels on a Stock that are based on a Price Template appear in Grey and are not editable.

To apply a Price Template to multiple Stock at the same time from a Stock List. Create a Stock List based on your selection criteria, right click, and select '**Apply Price Template**', select the template you wish to use, and click OK.

Note: New Security setting: Security > Stock - Allow to apply Price Templates from a List

Photocopier Edition: Price Templates is the mechanism to use for setting up and maintaining Contract Pricing

Items - Auto Add and Related Stock

Items has always had the ability to automatically add 'related' stock, that is, when an Item is changed (on a Job or Quote), a question is asked 'Item 'xxxx' contains Stock, add to Stock Grid?'. Item stock now includes an 'Auto Add' tick box that allows you to decide if the stock will be automatically added or not. 'Auto Add' is ticked by default when adding Stock to an Item.

Typically Item Stock are things like Applies Stock (tests, checks etc for example on Service Items), workflow related Applies Stock (Credit checks, Insurance required etc), and defaults like Minimum Workshop charge etc. This Item Stock would normally have 'Auto Add' ticked.

Other Item related Stock such as parts or consumables related to that Item, would not be ticked as 'Auto Add'.

The Stock Select screen also now includes a 'Related Stock' tab, when opened from a Job or Quote, where the Item has Related Stock. See enhancements to Stock Select for more details.

Stock Select - Multi Stock selection

Stock Select now allows you to select multiple Stock with quantities required. This allows you to open the Stock Select (from Job or Quote), select one or more stock, enter how many of each Stock is required, and then automatically add the list of selected Stock to the Job or Quote.

To select multiple Stock, open the Stock Select form, and enter the quantity required in the 'Select Qty' column. You can also click the Up/Down arrows to Increase/Decrease the quantity required value.

Once stock is selected the line will turn Green and it will be added to the Stock under the 'Selected Stock' tab.
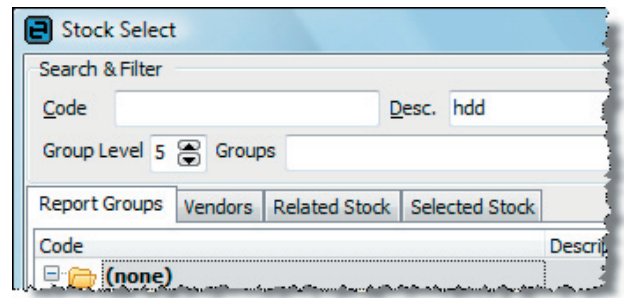
Stock remains in the list of Selected Stock until it is unselected (Select Qty = 0), that is, you can run the stock select filtering by, say, 'Drive', and select some stock. The selected stock appears under the 'Selected Stock' tab. Then run the stock select again filtered by, say, 'Monitor' and add some more stock to the 'Selected Stock' list.

Clicking OK will add the Selected Stock to the Job or Quote you are currently adding or editing.

Note: The stock you have selected will replace the line of Stock the Stock Select was opened from. When multiple stock has been selected, the current line will be replaced with multiple lines.

Stock Select shortcuts.

Left Mouse Double Click	Double clicking on a line of Stock will select that single Stock and close the Stock Select form as normal (if no other Stock has been selected)
Ctrl+UpArrow	Increases the current Stock's Select Qty by 1
Ctrl+DownArrow	Decreases the current Stock's Select Qty by 1
Ctrl+Left Mouse Click	Increases the current Stock's Select Qty by 1
Alt+Left Mouse Click	Decreases the current Stock's Select Qty by 1
Enter	Closes the Stock Select form and adds any selected Stock (same as OK button)
Ctrl+Enter	Re-runs the Stock Select (same as Run button)

Stock Select - Qty On Hand > 0

Stock Select now allows you to only display Stock that is on Hand, or Qty On Hand > 0. This is based on the 'Qty On Hand' figure, not 'Available', allowing you to sell from committed stock if required. The default setting for 'Qty On Hand > 0' can be set from the main menu **Tools > Options > Job - Default Qty On Hand > 0 (Jobs/Quotes)**.
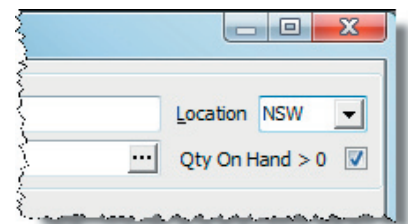
Stock Select - Related Stock

The Stock Selection screen has been updated to include a 'Related Stock' tab. When the stock selection screen is opened from a Job or Quote this new tab displays any stock related to the Job's Item (as above).

For example Item# CANON123 is a photocopier, and clicking on the stock select's Related tab shows toners etc.

Stock enhancements

Price Template support
Stock now includes support for Price Templates (see Price Templates above)

New Fields and Descriptions tab
Several new fields have been added including Short, Long and Warranty stock descriptions, Manufacturers Part#, and UPC codes. The additional description fields are location under a new Descriptions tab

Serial Number tracking enhancements
You can now enable unique serial number tracking at a Stock Level. Previously this was only at a global level for all Stock.

From the main menu **Tools > Options > Stock - Unique Serial# Tracking** (Off/Global/Stock Level)

Stock Terminology changes - Vendors and Brands
A 'Vendor' in Jim2 is who you purchase things from. To be consistent, the 'Supplier' tab in Stock has been renamed to 'Vendors'. The Vendor Groups (in Stock Groups) has been renamed to 'Brands'

For example: You may buy a product Brand 'X' from several Vendors

Stock GL Group changes
You can no longer select cheque or credit card (1xxxx/2xxxx) GL accounts in Stock GL Groups as these accounts can be multicurrency and hence are incompatible with stock (COGS etc) transactions. In the unlikely event you currently have cheque or credit card GL account linked to a Stock GL Group please contact Happen support for assistance.

Stock Attributes quick entry

Stock attributes can now be quickly entered from the keyboard as part of the Stock Code. On Jobs and Quotes, type the Stock Code follow by '\' and a stock attribute template.

For example: **C-01010\RED12**

Where **C-01010** is the Stock Code and **RED12** is the Stock Attribute template

Notes enhancements

CardFiles now display any related Debtors/Creditors notes.

Search enhancements

The very popular Jim2 Search introduced in v2.18 includes the following enhancements...

- Improved layout of search criteria
- New searching of Items and Item notes
- New searching of Debtors and Creditor notes
- New searching of Projects/Machines (Photocopier Edition)

You can now also use the '**%**' wildcard to multi searches.

For example: **drive%3.5**

Will search for text that has **drive** followed by **3.5**

Invoicing enhancements
Batch Invoicing now allows selection of the Invoice date for the entire batch.

Point Of Sale enhancements
Invoicing has been to open a connected cash draw only if a payment was made at point of invoicing.

General Journal and Payroll Integration
For all clients using MYOB Payroll Enterprise, you can now import the payroll journal straight into Jim2, thereby reducing data entry errors and rekeying of journals by admin staff.

Updated User Interface, Shortcuts, Splash screens and Log On

Jim2 v2.19 includes a cleaner user interface, new Refresh keyboard shortcut, updated Splash screen and Jim2 Log On.

New Shortcut key: **Alt F5** Refresh

Scheduling updates

Microsoft Office 2007 Style Navigation - You can now enable buttons that allow end-users to navigate to the closest preceding or subsequent appointment relative to the current view. If multiple resources are visible, navigation buttons are displayed for each individual resource.

New vertical scrolling tooltip support.

Banking enhancements

Banking now displays Branch in Banking Session drop down.

Creditor enhancements

Creditors now displays Vendor Inv# in payments view tab.

New Options settings

Jobs	Default Qty On Hand > 0 (Jobs/Quotes)
Jobs	Show Card Name in Job List
Jobs	Show Ship Name in Job List
CardFile	Default 'Send Statement via' when adding new CardFiles
Purchase	When entering stock, Price 'Auto fill from Vendor Tab'
Stock	Unique Serial# Tracking

Faxing enhancements (Zetafax)

Jim2 v2.19 has been updated to handle changes in the way the latest versions of Zetafax handles the embedding fax addressing. In previous versions of Jim2 the 'ZetaFaxString' had to be placed on the first page of the report to be faxed. This is no longer required as Jim2 will now embed the fax addressing commands automatically into the header of the first page, and the footer of the last page. The 'ZetaFaxString' is now blank to remain compatible with existing reports.

By default reports are automatically faxed and the Zetafax dialog is not displayed. To override this behaviour, at a report level, you can add a Jim2 variable as follows:

Variable name	**ZetaFaxPrompt_xxxx**	**(where xxxx = Report Name)**
Type	**Boolean**	
Value	**True**	

Jim2 Update enhancements

Jim2 v2.19 now includes a new **Jim2DBUpdate** program that replaces Jim2Update.

A new Jim2DBupdate will be shipped with every new version of Jim2. Among other things Jim2DBupdate will allow you to update any database version (from v2.18) onwards to the most current version.

Jim2 Server enhancements

Jim2 Server has been updated to handle v2.19 including the 'documents' database. Vendor stock feeds and non accounts related data is now stored in a separate document database (Jim_DatabaseName#Doc). This database is backed up and restored as part of your database. You can choose to backup only the accounts database if required.

Updated Security settings

The following additional security settings have been added:

Security > Purchases
- Allow to send electronically

Security > CardFile
- Setup Vendor for electronic POs

Security > Jobs > Stock
- Delete
- Allow to apply Price Templates from a List

Security > eBusiness
- View

Photocopier Edition only

Security > Jobs > Machines (or Projects)
- View
- Edit
- Add
- Edit meter setup
- Bill machine

Note: Please make sure you update your users security settings as they may be enabled by default.

Updated Options

The following additional option settings have been added:

Options > Job
- Default Qty On Hand > 0 (Jobs/Quotes)
- Show Cust Name in Job List
- Show Ship Name in Job List

Options > Purchase
- When entering stock, price (Auto Fill from Vendor tab)

Options > CardFile
- Send Statement via

Options > eBusiness
- Default Price Template
- Indicate price changes in days
- Show Buy Price
- Show List Price
- Show GP% as
- Show all Stock in Group

Photocopier Edition only

Options > Jobs > Machine (or Project)
- Enable Machines (or Projects)
- I call Project
- Default Billing Meter Job Type
- Default Service Meter Job Type
- Default Service Jobs Type
- Default Consumable Job Type
- Warn if Meter reading outside average(%)
- Meter reading entry period (days)
- Warn if outside Meter Read entry period
- Set Billing Meter Jobs to Ready
- Copy comments as Fault Description
- Page Count URL

New Reports

The system reports have been updated for Jim2 v2.19

Jim2 v2.19 now includes a built in spreadsheet style Report preview. This allows custom and spreadsheet reports to be generated and display in spreadsheet format. They can then be printed or saved as required.

Technical Information & Requirements

Windows Vista Support

Windows Vista (all editions) is supported by Happen and is compatible with Jim2 BE v2.19.

Database V148

To upgrade from Jim2 v2.18 to Jim2 v2.19 backup your database then run **Jim2Upgrade_v219_2524.exe** from your server.

The Jim2 update program will automatically update existing version 2.18 or higher databases to the current version 2.19. That is – by running the Version 2.19 upgrade, you will have access to these new features and functions WITHOUT affecting your existing Jim2 records.

To manually update a database you have restored simply run the current Jim2DBUpdate.exe.
This file can be located in your Jim2 subdirectory after running the **jim2upgrade_v219_2524.exe** upgrade program.

Note: If you are not running at least v2.18 you must upgrade to it prior to upgrading to v2.19. Please refer to previous release notes for more information.

Note: As of v2.19 the latest Jim2DBUpdate.exe will upgrade any Jim2 database from v2.18 to the current version.

Jim2 Server v2.19

Jim2 Server has been updated to support the new features in Jim2 v2.19.

Microsoft SQL Server

Jim2 fully supports all versions of Microsoft SQL Server from version 2000 onwards including...

SQL Server 2005 Enterprise Edition (both 32 and 64 bit versions)

SQL Server 2005 Standard Edition (both 32 and 64 bit versions)

SQL Server 2005 Workgroup Edition

SQL Server 2005 Express Edition

Microsoft SQL Server 2000 (with service pack 2 or greater)

Microsoft MSDE 2000 (with service pack 4 or greater)

Please also note that Microsoft SQL version 7 is no longer supported by Happen Business.