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Jim2® Business Engine
Version 2.19 Service Release (all editions)

Release Notes

Jim2® Business Engine v2.19 service release notes – 21/10/08

Jim2 v2.19 Service Release - Build 2590

This document covers new features and enhancements made to Jim2 v2.19 since being officially released. Many of the enhancements included in this service release are based on feedback provided by Jim2 users based on the official release. We have also included a couple of new features that were ready for release, and decided to include in this service release rather than wait until v2.20.

We strongly recommend all users upgrade to the current version of Jim2.

Please read this document in conjunction with the original Jim2 v2.19 Release Notes.

Features and Enhancements summary - All Editions

The following features and enhancements are for all editions of Jim2 v2.19.

Price Groups

Price Groups is a new feature that allows Products (stock) to be placed into a specific price group, and Customer pricing to be based on these Price Groups. Stock groups and CardFiles have been updated to handle this new functionality.

For example: The customer's default price level is Level 1 but they get Price Level 2 on products that are in the 'Printer' Price Group.

Jobs and Quotes - Price colour coding

Stock on Jobs and Quotes now includes colour coding to indicate how the selling price was calculated.

Jim2 eBusiness Connect - Weight

Jim2 eBusiness Connect now provides weight information. When Stock is created in Jim2 the weight information (Stock Details tab) will be automatically updated. Existing linked Jim2 Stock will also be updated.

Jim2 eBusiness Connect - Choose Vendor warehouse

Electronic Purchase Orders (eSend) now allows you to choose which of the Vendor's warehouses you wish the goods to ship from.

Jim2 eBusiness Connect - Jim2 eBusiness Server status

Jim2 now displays a Popup message if Jim2 eBusiness Connect is enabled but not currently running.

Purchase Orders - Weight and Qty count

Purchase Orders now includes a Weight column and a Weight and Qty count summary.

Purchase Orders - Buy Price Security

Purchase Orders now include a new Buy Price Security option 'Allow to change price'.

Reports

New and updated reports including:

- Branch Level Stock Stickers
- Stock List – Price Protection
- Creditors reconciliation

Various other system reports have also been updated.



Features and Enhancements summary - Photocopier Edition

The following features and enhancements are specific to the Photocopier Edition of Jim2 v2.19.

Machines - New Section and multiple Machine Lists

Machines now have their own section and now appear in the Sidebar and NavTree under Jobs. This allows you to have the same 'features' as Jobs, Quotes etc including multiple Machine lists. Options and Security now also have their own Machine 'sections' along with Jim2's menus etc.

Machine Billing - Skip Billing Cycle

You can now skip a billing cycle when billing a Machine. This will clear the 'Page Request' date and move the Machine into the next billing cycle. Base Charges and Min Charges for the skipped cycles will be added to the next billing.

Machines Meter setup - Toner yield and Copy Cost

Machine Meter Setup now includes 'Toner Surplus', 'Toner Cartridges' and 'A4 Ratio' information for each individual meter. This information allows Jim2 to provide extremely accurate Toner Yield and Copy Cost reporting.

Machines - New Default Stock tab

Machines now have a new default Stock tab. This tab allows you to have stock automatically added to Consumable or Service Jobs created for this specific Machine. For example: Add a travel charge for this specific Machine when doing a Service Job.

Machines - New Default Fault and Invoice descriptions

Machines can now have a default Fault and Invoice description. When a Job is created from a Machine, the default Fault or Invoice description will appear on the Job.

Machines - Active and Invoiced Job grid layouts

The grids for both Active and Invoiced Jobs tabs can now be saved. This layout is for the currently logged user, allowing different users to view these Jobs differently based on the type of work they do within their organisation.

Machines - Named Machine types

You can now create your own Machine 'Types' instead of having to use 'Billing Other' (for phone system for example).

Features and Enhancements detailed - All Editions

Price Groups

Price Groups is a new feature that allows products (Stock) to be placed into a specific price group, and Customer pricing to be based on these Price Groups. Stock groups and CardFiles have been updated to handle this new functionality.

For example: The customer's default price level is Level 1 but they get Price Level 2 on products that are in the 'Printer' Price Group.

The following areas in Jim2 have been updated for Price Groups...

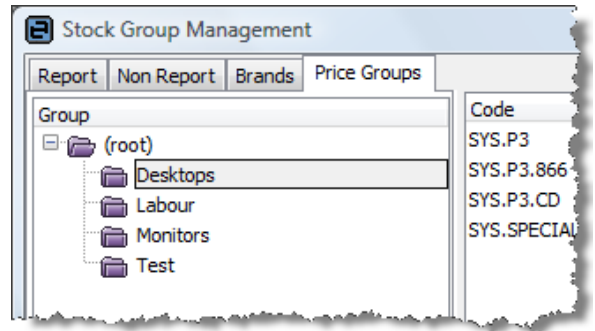
Stock Group Management

Stock Groups (Tools > Groups > Stock) now includes a new group type 'Price Group'. From the 'Price Group' tab you can add new Price Groups and 'Drag and Drop' stock into these groups.

You can also add individual Stock to a Price Group by editing the Stock record and clicking on the Groups '...' button.

It is suggested to name Price Groups slightly differently from other groups to avoid confusion.

For example 'Price Printers', rather than 'Printers'.

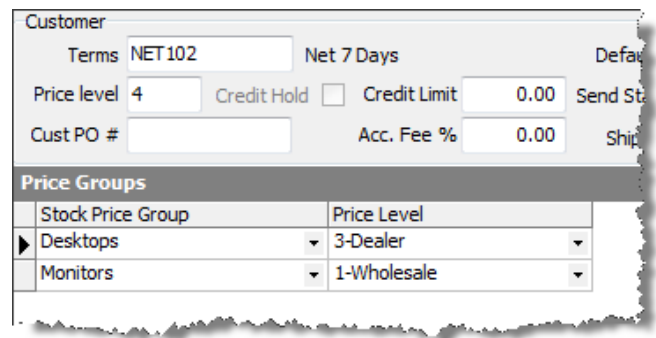


Stock List

You can bulk update Stock to a specific Price Group from a Stock List. Generate a Stock List based on any criteria, and then right click, and select 'Apply Stock Group'. Select the desired Price Group and click OK.

CardFiles

The 'Customer' tab on CardFiles now includes a grid that allows you to add exceptions to the customer's default price level. In the 'Price Groups' grid add the 'Price Group' and the 'Price Level' for that group. You do not need to add all the Price Groups, just the exceptions to the customer's default price level.



So how do Price Groups actually work?

All customer CardFiles in Jim2 must have a default price level. That is, when a Job or Quote is added for that customer, Jim2 will use the customer's default price level to calculate selling prices. With Price Groups, if the Stock is in a Price Group, Jim2 will check if the customer receives a different price for this Price Group. Of course, if the Stock has a Customer specific price, it will be used regardless.

The order of calculating selling prices when adding stock to a Job or Quotes is as follows:

1. Does the Stock have a 'Customer Specific' price for this Stock?
If YES, use it.
2. Does the Stock belong to a Price Group, and does the Customer have a Price group exception for this Price Group?
If YES to both, use the Customer's Price Group's price level.
3. None of the above?
Use the Customer's price level.

Once Jim2 has calculated the selling price it will then do a check against the Stock's 'Min Sale Price' price level (if set).

All this allows for some extremely flexible pricing structures and huge time savings!

Jobs and Quotes - Price colour coding

One of the issues with having such a flexible pricing structure is that it can become difficult to determine how a selling price was generated. To assist with this Jim2 now includes colour codes pricing on Jobs and Quotes to indicate how the selling price was calculated.

As well as visually being able to easily determine how the price was generated, by passing your mouse pointer over a price, a hint will be displayed.

Supply	B. Ord	Price TF	Price T	Total
1	0	90.91	100.00 G	100.00
1	0	72.73	80.00 G	80.00
1	0	20.00	22.00 G	22.00
1	0	9.09	10.00 G	10.00

Customer specific price

The colour coding is as follows:

No Colour	Price Level is customer's default
Yellow	Price Level is different from customer's default or has been manually entered
Green	Customer specific Price Level
Pink	Min Price Level
Purple	Contract Price Level (Photocopier Edition)

Jim2 eBusiness Connect - Weight

Jim2 eBusiness Connect now provides weight information. When Stock is created in Jim2 the weight information (Stock Details tab) will be automatically updated. Existing linked Stock will also be updated.

In addition, Vendor Stock Feed rules have been updated. You can now create a rule to update the weight on linked Jim Stock if the weight changes in the Vendor stock feed.

Jim2 eBusiness Connect - Choose Vendor warehouse

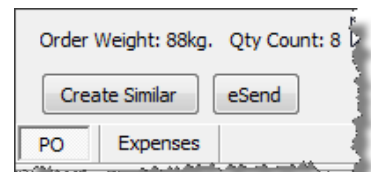
When sending Electronic Purchase Orders (eSend) to a Vendor Jim2 always used the default vendor warehouse as configured on the Vendors CardFile (Electronic Purchase Order setup). You can now override the Vendors default 'ship from' warehouse when clicking 'eSend' and choose an alternative warehouse.

Jim2 eBusiness Connect - Jim2 eBusiness Server status

Without physically checking on the server there was no easy way to check if Jim2 eBusiness Server (Jes) had stopped running (due to server reboot etc). Jim2 now displays a Popup message if Jim2 eBusiness Connect is enabled and Jes is not currently running.

Purchase Orders - Weight and Qty count

Purchase Orders now includes a Weight column and a Weight and Qty count summary. By default the 'Weight' column is not displayed. Click the '+' sign in the top left hand of the stock grid to see all columns or right click and select 'Grid Columns...' to configure.



Purchase Orders - Buy Price Security

Purchase Orders now include a new Buy Price Security option 'Allow to change price'. This security allows you to stop users changing the default purchase price on Purchase Orders. The default purchase price is calculated by the method set 'When entering Stock, Price' in Tools > Options > Purchase.

With this security enabled a price can be entered if it is lower than the calculated price, or if the calculated price was \$0.00.

Reports (all editions)

New reports:

Report Location	Report Name	Report format	Description
Creditors	Creditors Reconciliation	Spreadsheet	This report is useful for providing Creditors with a detailed list of Invoices that have been paid, related payments (Cheques), and Credits that have been taken up.
Stock List	Stock List - Price Protection	Spreadsheet	<p>This report is used to provide Vendors with a detailed report of selected Stock that was in stock on a selected day.</p> <p>The purpose of this report is to provide Vendors with a list of products and related details (PO#, Vendor invoice#, invoice date and serial numbers) and is used when requesting price protection credits.</p>

Updated reports:

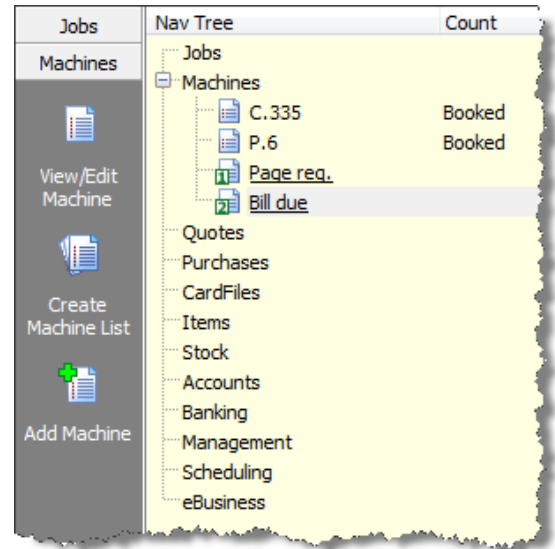
Report Location	Report Name	Report format	Description
Purchase Stock	Stock Stickers	Report	This report has been updated to handle Branch Level pricing. When printing stickers Branch Level pricing for the currently logged user will be used.
Reports > Stock Reports	Stock Profit	Report	Now handles Journal stock types
Job List	Job List - Job Profit	Report	Now handles Journal stock types
Job List	Job List - Job Profit by Stock	Report	Now handles Journal stock types
Invoice	InvoiceRetail 80mm	Report	Now prints 'Customer' rather than 'Ship' address

Features and Enhancements detailed - Photocopier Edition

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Machines now have their own section and now appear in the Sidebar and NavTree under Jobs. This allows you to have the same 'features' as Jobs, Quotes etc, including multiple Machine lists. Options, Security and Menus now also have their own Machine 'sections'.



Machine Billing - Skip Billing Cycle

You can now skip a billing cycle when billing a Machine. This will clear the 'Page Request' date and move the Machine into the next billing cycle. Base Charges and Min Charges for the skipped cycles will be added to the next billing. If a billing cycle is 'skipped' next month will pick up 2x Min Charge/ Base charge (eg qty 2 or 3 etc, not double/triple the \$).

Billing Meter Read

Machine# C.1234 Cust# SAMPLE.CU Date 16/10/2008
 Cust Ref NIL Item# DCC450 Last Billed 27/06/2008

Name	Last Meter Value	Average Meter Value	New Meter Value	Free Counts Included	Quantity To Be Billed	Rate(ex)	Total(ex)
▶ BLACK.METER	245888	8019		0		0.0170	0.0000
COLOUR.METER	63516	2479		0		0.1800	0.0000
Base Charge					1	25.0000	25.0000
Grand Total							25.0000

Buttons: Bill Average Skip Billing cycle Underline - Linked Meters Generate Job Cancel

Machines Meter setup - Toner yield and Copy Cost

Machine Meter Setup now includes 'Toner Surplus', 'Toner Cartridges' and 'A4 Ratio' information for each individual meter. This information allows Jim2 to provide extremely accurate Toner Yield and Copy Cost reporting.

Hide On Invoice	Hide Service	Linked Meter	Toner Surplus	Toner Cartridges	A4 Ratio
<input type="checkbox"/>	<input checked="" type="checkbox"/>	▼	1	1	1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	▼	1	1	1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	▼	0	0	0

Machines - New Default Stock tab

Machines now have a new 'Default Stock' tab. Stock added here will automatically be added to Jobs created for a specific machines. You can select whether the stock is added on Service and/or Consumable Jobs. A good example of the use of default stock is to handle service travel charges on specific machines.

To clarify...

Default stock is automatically added to select Job types and is machine specific. Typically used for service travel charges etc.

Related Stock is 'related' to specific models of machines. Typically used for toners, consumables and spare parts etc.

Machines - New Default Fault and Invoice descriptions

Machines can now have a default Fault and Invoice description. When a Job is created from a Machine the default Fault or Invoice description will appear on the Job.

Machines - Active and Invoiced Job grid layouts

The grids for both Active and Invoiced Jobs tabs can be saved. This layout is for the currently logged user, allowing different users to view these Jobs differently, based on the type of work they do within their organisation.

To create your own default layout, configure the grid (column order, grouping and sort order) and then right click and select 'Save Layout'.

Machines - Named Machine types

You can now create your own Machine 'Types' instead of having to use 'Billing Other' (for phone system for example).

You add new Machine Type via setups (Tools > Setups). Click on Machines and then click 'Add'. The Machine Type can be either an 'Asset' (no meters) or 'Machine' (with meters).

Reports (Photocopier edition)

New reports:

Report Location	Report Name	Report format	Description
Machine List	Cost per Copy	Spreadsheet	This report provides a cost per copy by meter with a total cost per copy for each Machine in the list. Costs are split proportionally by meter income. Please give Happen feedback on this report.

Technical Information & Requirements

Windows Vista Support

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

Database V152

To upgrade from Jim2 v2.18 to Jim2 v2.19 backup your database then run **Jim2Upgrade_v219_2590.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_2590.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.

Order of Upgrade

It is recommended to upgrade Jim2 in the following order...

1. Close all Jim2 clients
2. Stop and close Jim2 eBusiness Server (Jes) if installed
3. Upgrade Jim2
4. Upgrade Jes (if installed)

The latest version of Jim2 and Jes upgrades can be found at www.happen.biz/latestupdate.aspx