Jim2® Business Engine
Version 4.0 (all editions)

Release Notes

Jim2® Business Engine v4.0 release notes – 01/02/15

Welcome to Jim2 Version 4.0 – 'Documents'

Jim2 version 4.0 is so big, it's a major point release, so we're skipping v3.4 altogether and heading straight to Jim2 v4.0.

Jim2 v4.0 introduces new features and enhanced functionality across nearly all areas. Most significantly, Jim2 v4.0 includes full document management. You will now have the ability to attach documents (Images, PDFs, Office documents, any files) to anything in Jim2. Things like plans, pictures, brochures, manuals, certificates, licences, etc, can be stored and easily located against Jobs, Stock, Quotes, CardFiles, and more in Jim2 Business Engine v4.0. Documents includes full version control, security, and drag/drop functionality. You can literally drag a file onto a Job, automatically adding the Document, and linking it to the Job.

Other features include a new, clean user interface, the ability to personalise your navigation tree, labour and timers everywhere, new payments/refunds functions, updated vendor stock feeds, and more...

Jim2 v4.0 also includes major technical changes, including a completely new scripting engine, new database access layer, and support for the very latest version of Microsoft SQL 2014.

IMPORTANT: Possible Breaking Changes
Be sure to read the '**Getting Ready for Jim2 v4.0**' section of these release notes **PRIOR** to upgrading to Jim2 v4.0. There are a number of possible breaking changes in this release particularly in relation to custom scripts and reports. Click on the blue heading to jump to that section.

Technical Changes
- New Scripting Engine and 'server side' reports
- New database access layer
- Microsoft SQL Server 2014 support

User Interface
- New clean, flat 'Office 2013' appearance
- Ability to change both skin colour and accent
- Reorder Navigation Tree and Ribbon Tabs
- Reorder Lists
- Move Objects from Lists
- New Document Ribbon Tab
- Unified and live 'Object' tabs
- Ability to rename Quote (Lead, Opportunity etc)
- Status bar enhancements including 'Actual Labour' and 'Timers'

Documents
- Full Document management including version control, security, and drag/drop functionality
- Supports any type of Document including PDF, images, Word, Excel etc.
- Security can be set at both user and security group level
- Documents can be linked to Jim2 Objects (Jobs, Quotes, Stock etc.)
- Ability to add Document Groups, Categories, and Tags
- Special support for 'Signed' documents (signed reports via Jim2 Mobile)
- List and folder view as per Windows Explorer
- Related documents
- Update document emailing functionality

Timers and Labour Everywhere
- Labour Timers
- Updated Labour tracking on Jobs, Quotes, Purchases, etc.
- Timesheet enhancements

Job/Order Payments and Refunds
- Add prepayments directly to Jobs/Orders (bypassing Debtors)
- Refund customers directly from related Job, RFC or CardFile
- New Job/Order payments total and balance due

Vendor Feeds (eBusiness Connect required)
- Redesigned to handle hundreds of vendor feeds
- Updated vendor stock searching
- Ability to link 'unknown' suppliers

Options
- Stock – Default base unit
- Documents – New document related options tab

Debtors
- Right-click view Job from Prepayments

GST Sessions
- New Zealand GST summary

Bank Rec
- Now allows grouping, sorting, and searching
- Now allows exporting and printing of partially completed sessions

Electronic Payments
- New Zealand banking 'ABA' support
- Debtors Direct Debit feature (generate an ABA file for bank to debit your customer's bank account)

Quotes
- Ability to rename Quotes
- New 'type' field

Dispatch
- Produce run sheets and labels for couriers in Dispatch, as well as ability to change details on the fly

Stock
- Multiple barcode support for Serialised and Special stock
- Ability to change the default unit of measure (via Options)

Stock List
- Ability to flag Stock as Active/Inactive

Stock Procurement
- Average Monthly Transfer information
- 'Transfer From' current and statistics figures

Stock Transfer
- New Due Date

Email Rules
- New Email action – Process as Order

Help File
- New look and completely updated

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 v4.0

Things to know prior to upgrading

Typically, Jim2 v4.0 will simply install and run, however due to the new scripting engine introduced in v4.0, any custom scripts and reports you have may fail.

It is strongly suggested to upgrade to the latest version of Jim2 v3.3 (build 4592 or greater) and send your custom scripts to Happen Business for conversion, PRIOR to upgrading to Jim2 v4.0.

Steps to send your custom scripts to Happen Business can be found at http://www.happen.biz/Jim2v4Upgrade.aspx and repeated in the '**Getting Ready for Jim2 v4.0**' section of this document.

Handling of Email (since v3.2)

The way Jim2 handles email has completely changed. The most significant changes are:

• **Emails can now be both sent AND received**
• **Emails are now queued and sent via Jim2 eBusiness Server (JES)**
• **Emails are now saved in your Jim2 database**

Previously, emails were sent directly via the Jim2 client. Since v3.2, emails sent via Jim2 client are queued, and delivered from your server via Jim2 eBusiness Business Server (JES). Amongst several other advantages, this allows emails to be queued in the Outbox, and then sent at a specific rate (5 per minute for example). It also allows for emails that can't be delivered straight away to be retried several times, etc.

Jim2 eBusiness Server (JES) required (since v3.3)

Jim2 now requires JES to be installed on your server and an instance of JES created for your database. The JES installation and updater is no longer a separate download. Most Jim2 customers already have JES installed, and it is a very quick and simple process. Please see the installation notes section for more information.

• **JES must be installed**
• **An instance of JES must be created for your database**
• **Check the firewall on your server so that the JES Service is accessible from the Jim2 Client.**

Jim2 Server Prerequisites

Jim2 Server now requires Microsoft .NET 4 Framework 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 if required. Requirements:

• **Microsoft .NET v4 Framework must be installed**
• **Windows Installer 4.5 must be installed**

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 v4 Framework must be installed**

Note: Windows XP is no longer officially supported. Please look at upgrading to Windows 7 or later.

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**

Microsoft SQL Server

As all emails and documents are saved within your Jim2 database, you may find the size of your database will increase. This is not normally an issue in terms of performance, but may be a problem if you are running the **Express** versions of SQL.

Note: SQL 2005 Express has a database limit of 4GB. If you are running SQL 2005 Express you may wish to think about upgrading to SQL Express 2012, where the limit has increased to 10GB, or 'full' SQL where no limit applies. This can be done at any time after the upgrade.

Note: Jim2 v4.0 is the last version that will support SQL 2005 as it has reached mainstream end of life support from Microsoft.

Conclusion

You should find that Jim2 v4.0 will install quickly and easily without any issues. Please contact Happen Business if you have any Jim2 installation issues.

Getting Ready for Jim2 v4.0

We have always strived to use the most current development tools, compilers, and technologies available. This is important for us as a company, ensuring we are competitive and relevant. But more notably, it provides you with the most current and best tools available.

New Scripting Engine in Jim2 v4.0
The scripting engine we were using was past its due date. It was holding us back from using the current compilers available, which was a real problem. As such, after considerable development effort, we have replaced the scripting engine in Jim2 v4.0 with one that allows us to move forward and provide many additional benefits. These include 'Server Side' scripting, which means we can start to make many reports available via Jim2 Mobile.

Replacing a scripting engine and maintaining compatibility with the thousands of existing custom scripts and reports is pretty tricky, and is well near impossible to achieve. We estimate that the new scripting engine is around 95% compatible with the old one. For that reason, any custom scripts (so scripts, not necessarily reports) may need to be updated by Happen Business prior to upgrading to Jim2 v4.0.

Note: All system reports and system scripts have been updated and are included in the Jim2 v4.0 upgrade.

Breaking Changes
Typically, upgrading Jim2 to the latest version is a very simple process.

The Jim2 v4.0 upgrade continues to be much the same, EXCEPT that as a result of the new scripting engine we cannot 100% guarantee that all custom scripts and reports will continue to function as usual without review.

Jim2 v3.3 Service Release includes an '**Export Custom Scripts**' function that allows you to send any custom script you have to Happen for analysis and conversion, if required, **prior to upgrading to v4.0**.

We offer this service *free of charge* to existing customers during their v4.0 update process. The conversion process is typically very minor and is mainly due to 'sloppy' syntax allowed in the old scripting engine.

We aim to attend to each script conversion request as quickly as possible, however please be aware that it may take Happen Business some time to resolve custom scripts that require manual attention. Typically, we estimate this to only take a few days, however we would like to thank you in advance for your patience.

Does this apply to me?
If you don't have any custom scripts, you can simply upgrade to Jim2 v4.0 via the standard upgrade process.

If you do have custom scripts, we suggest you upgrade to the latest Jim2 v3.3 Service Release PRIOR to upgrading to v4.0, enabling you to send your custom scripts to Happen Business for analysis and conversion.

What can I expect?
We'll review each request to ensure every custom script operates as it is intended in v4.0, and return the scripts to you in the updated v4.0 format. You are then ready to perform the v4.0 upgrade, and then import your updated custom scripts.

We ask you to export your custom scripts prior to performing the v4.0 upgrade to ensure you do not suffer any loss of critical Jim2 functionality provided via a custom script.

What if I've already done the v4.0 upgrade?
If you've upgraded prior to having your custom scripts attended to, Jim2 will still function; however any functionality provided via your custom scripts will not. You can still send your scripts for upgrading, but keep in mind we cannot guarantee the turnaround time for their conversion. Your custom scripts can be exported via **Tools > Scripting Engine**, and then clicking '**Send Custom scripts to Happen**'.

Managed Services Edition – Special Note
Due to some internal restructuring and optimisation of code in Jim2 eBusiness Server (JES), project related billing for both the Managed Services and Managed Print Services editions of Jim2 no longer require the JES Photocopier (MPS Connectors) module to be enabled.

If you are running Jim2 Managed Services Edition (without additional MPS functionality), you'll need to disable or remove this module prior to starting JES.

The Jim2 v4.0 upgrade should automatically disable this module if required. To disable the module manually run the Jim2 Configuration Manager (**JimCM.exe**), right click on your JES instance, and select '**Configure**'. Select '**MPS Connectors**', and click '**Remove**'.

The JES MPS Connectors module is now only required for Jim2 MPS Editions with one or more licenced MPS Connectors.

How to Export Custom Scripts to Happen Business Prior to Jim v4.0 Upgrade

We recommend you perform the following steps to send your custom scripts to Happen Business;

Step 1:
Upgrade to the latest Jim2 v3.3 Service Release which includes functionality to easily export custom scripts to Happen Business..

Step 2:
Go to Jim2 ribbon and select **Tools > Scripting Engine**

Step 3:
In the Jim2, select **Tools > Scripting Engine** from the Jim2 Ribbon to go to the script editor, Click the '**Send Scripts to Happen**' icon to send your custom scripts to our team for analysis.
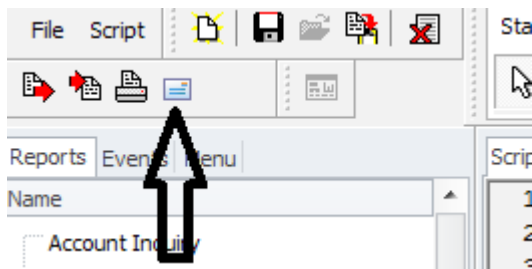
Step 4:
Once your custom scripts are received, we will review your custom scripts and advise if they require manual attention.

If your custom scripts do not require conversion, you can skip performing the activities in step 6. You are free to upgrade to Jim2 v4.0 with full functionality, includingcustom scripts.

If your custom scripts do require conversion, you will receive the converted custom scripts. You can continue to proceed to the next step ready to upgrade to Jim2 v4.0.

Step 5:
Perform the upgrade to Jim2 v4.0.

Step 6:
After completing the upgrade, import your converted custom scripts by clicking **Tools > Scripting Engine** then '**Import from Happen**' icon.

The upgrade process is complete. Enjoy the exciting new features v4.0 has to offer..

If you have any additional questions in regard to upgrading to the latest update, please contact us at support@happen.biz.

Features and Enhancements – All Editions

Technical Changes in Jim2 v4.0

The following section details technical changes in Jim2 v4.0. Feel free to skip this section as it is aimed mainly at your Jim2 system administrator.

Database and Speed

Jim2 v4.0 now supports the very latest version of Microsoft SQL Server 2014. Additionally, the actual data access layer has been upgraded, and is significantly faster.

Live Lists now refresh more efficiently, reducing network 'chatter' and improving logon speed.

New Scripting Engine

Jim2 v4.0 includes a completely new scripting engine and script form designer. Whilst we have attempted to make it as compatible as possible with existing scripts (v3.3 and prior), not all scripts will convert and run successfully. We estimate that the new scripting engine is around 95% compatible with the old one.

New Language
The new scripting engine is entirely Object Pascal based, and no longer supports Microsoft ActiveX scripting. Therefore, any custom scripts written in other languages (Visual Basic, Javascript etc) are no longer supported, and will require rewriting. This is a very small percentage of custom scripts, and will not affect the majority of customers.

Note: The 'Data Execution Prevention' security setting required on some systems to execute Jim2 scripts is no longer required to be set under Jim2 v4.0.

Script File Extension
Scripts converted to or created under Jim2 v4.0, are saved in a new format with a **.jscx** file extension.

New Editor and Form Designer
Along with the new scripting language, v4.0 includes a completely new script IDE (Integrated Development Environment) including script management (importing, saving etc), a new script editor and debugger, and a new script form designer.

The new fully featured script IDE supports:

- Multiple script editing
- Syntax highlighting
- Editor code folding
- Debugger Break Points
- Editor Bookmarks
- Code completion (shift space within the code editor)
- Code Helper Palette (available Functions, Variables, Types, etc)
- Tool Palette (form component selection etc)
- Object Inspector with Properties and Events editor
- Form Structure
- Unit Code, Design and Info tabs
- Debug panel with Local Variables, Watches, and Call Stack
- Report selection (allows execution of script against selected report within the IDE)
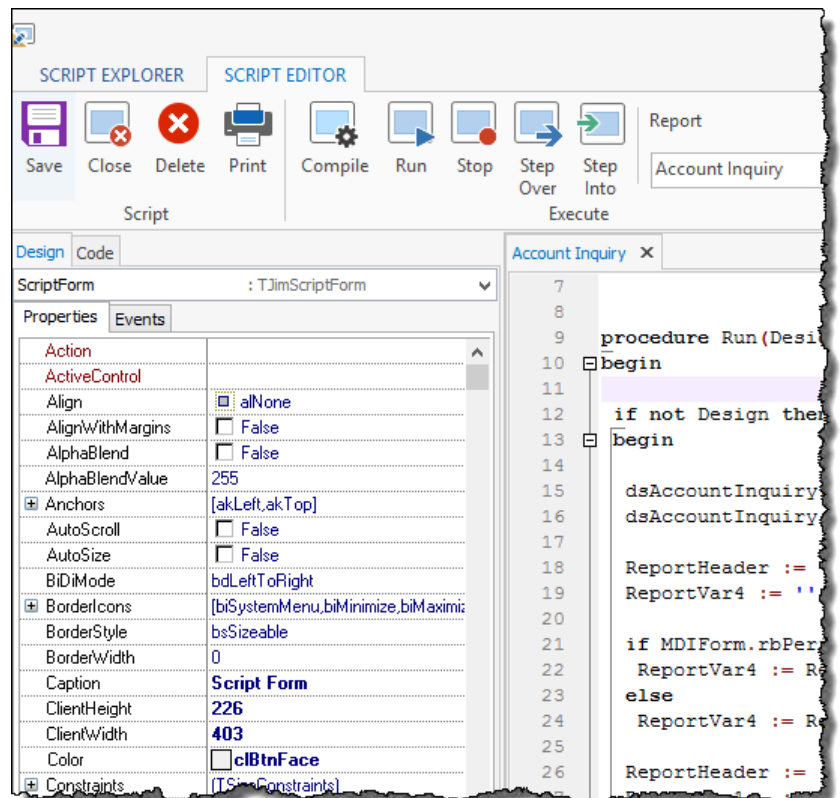
It should be noted that the script IDE is no longer modal, that is, it can be open and used whilst still using the Jim2 client. As such, scripts have direct access to the currently opened object (Job, Quote, List etc), so the ability to have to provide 'dummy' data to the script and report is of lesser importance.

The Script IDE opens in its own window, and appears as a second icon in the Windows task bar. When open, it also appears under '**Switch Windows**' located in the ribbon's Quick Access Toolbar.

Note: As the Jim2 v4.0 Script IDE features a fully integrated debugger, it no longer requires or supports DSD.exe.

Library Scripts

Library scripts are a new type of script that are used for 'scripted' Jim2 functions, such as the creation of ABA files, and for 'common' code to be shared across multiple scripts. They can be included in scripts via the Object Pascal 'uses unit' syntax.

Server Side Scripting

One of the many motivations for replacing the scripting engine in Jim2 v4.0 was to provide the ability to run scripts (and associated reports) server side. That is, to run the script and report on your server ,rather than locally on the Jim2 client. The main advantage of this is that if a script can run server side, the associated report is available via Jim2 Mobile.

Several key system scripts have been updated to run server side which enables their associated reports to be available on Jim2 Mobile including:

Script Name	Examples of related System Reports
Statement	CardFiles > CardFiles > **Statement** Debtors > Debtors > **Statement**
Invoice	Invoices > Invoices > **InvoiceSale** Invoices > Invoices > **InvoiceSaleSimple** Invoices > Invoices > **InvoiceService** Invoices > Invoices > **InvoiceServiceSale**
Job	Jobs > Jobs > **Job Receipt** Jobs > Jobs > **Job–Onsite**
Job w/o Logo	Jobs > Jobs > **Job** Jobs > Jobs > **Manufacturing Job** Jobs > Jobs > **Job No Comment**

Separating User Input from Report Generation

Typically, scripts are executed from the Jim2 client by calling the script's **Run (DesignMode: boolean)** procedure. When called from the report toolbar DesignMode is **false**, and when called from within the report designer DesignMode is **true**.

As mentioned above, the script IDE is no longer modal, that is, it can be open and used whilst still using the Jim2 client. As such, scripts have direct access to the currently opened object (Job, Quote, List etc), so the ability to have to provide 'dummy' data to the script and report is of lesser importance.

Server Side scripts require no user interaction, and have any report parameters (typically entered by the user via the scripts associated form) passed to them via a JSON record.

A report that supports server side scripting is executed calling the script's **RunServerSide (jsonstr : string)** procedure. The variable **jsonstr** contains the report parameters.

For example the Job script contains the following procedure:

```
procedure RunServerSide( jsonstr : string );
begin
  DesignMode := False;

  ReportParams := JSON.Parse( jsonstr );

  qJimJob := CreateComponent(self, 'TFDQuery');
  qJimJob.Connection := DM.JimConnection;
  qJimJob.SQL.Text := 'SELECT * FROM JimJob Where JobNo = ' + ReportParams.jobNo;
  qJimJob.Open();

  if (qJimJob.EOF) then
      raise Exception.Create( 'JobNo ' + ReportParams.jobNo + ' does not exist' );

  RunReport();
end;
```

Compiler Directives

A script can and should be coded to support both client side and server side execution, noting that some resources available client side (for example the actual form and its properties, etc) are not available server side.

To handle both 'sides' the scripting engine supports 'compiler directives' to include/exclude client side and server side code as required.

For example the 'Statement' script contains the following code that uses the SERVER_SCRIPTING compiler directive:

```
{$IFNDEF SERVER_SCRIPTING}
  EmailSubject := ReportName + ' for' + qCardFile.FieldByName('CardCode').AsString + ' ' +
                                qCardFile.FieldByName('Name').AsString +
                        ' for Date ' + ReportVar1;

  EmailSubject := EmailSubject + ' from ' + CompanyName;
{$ENDIF}
```

Report Designer Changes

The Jim2 Report Designer (Jim2RB.exe) is no longer a separate executable, and is now fully integrated in the main Jim2 application (Jim2.exe).

Much like the Script IDE, clicking **Tools > Report Designer,** opens the Report Designer in it's own non-modal window, and appears as a separate icon in the Windows task bar. When open, it also appears under '**Switch Windows**' located in the ribbon's Quick Access Toolbar.

Signable Reports

Reports can now be flagged as '**Signable**', meaning the report can be executed server side, and displayed to the end user via Jim2 Mobile to sign. The report is then regenerated with an image of signature embedded and saved as a related '**Signed Document**' against the related Jim2 object (Job, Quote etc).

User CardFiles can also include the user's signature, and be included in signed reports.

Both these signatures (the end user and logged in Jim2 user) are made available to the report via the report's JimSystem data pipeline at point of document generation:

Signature related report fields available:

Data Pipeline	Data Field	Related report component	Description
JimSystem	Signature	DBImage	Scanned image of customer/end user signature
JimSystem	SignatureDate	DBText	Date and time that customer/end user signed Set DisplayFormat as required. For example: dd mmm yyyy h:nn AM/PM
JimSystem	SignatureName	DBText	Name of customer/end user at point of signing
JimSystem	UserSignature	DBImage	Signature of Jim2 logged user at point of signing This is a scanned image of the user's signature saved as a document and linked to the user's CardFile File type should be PNG Document usage type should be Signature
JimSystem	UserName	DBText	Name of Jim2 logged user at point of signing

User Interface Enhancements

The following section details the user interface (UI) changes in Jim2 v4.0.

New Clean, Flat 'Office' Appearance

Jim2 v4.0 sports a new clean, flat 'Office' user interface, and updated 'flat' icons. The layout of the ribbon tabs and icons remain much the same, apart from the addition of a new '**Documents**' tab. Also, to be consistent with v4.0's new 'labour' functionality, the '**Time Sheets**' icon has moved from the '**Jobs**' ribbon tab to '**CardFiles**' ribbon tab.

Skin Colour and Accent

The new interface supports three new 'skins' and five new 'accents', replacing the four 'fixed' style skins in previous versions.

The three new skins are as follows:

- Dark Grey
- Light Grey *
- White

The five new skin accents are as follows:

- 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 you 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 therefore multiple Jim2 databases), one company from another.

Setting a Skin and Accent
The database's skin and accent is set via **Tools > Options > General**. The 'Training' skin/accent combination is used if this database is restored as your training or play database.

Personalised Navigation Tree and Ribbon Tabs

We've further enhanced usability to be able to reorder the entire Navigation Tree and Ribbon in Jim2. For example, you can now change your layout to Schedule, Dashboard, Email, Jobs, etc, making the areas of Jim2 that you use the most more easily accessible. Additionally, you can reorder all lists in your Nav Tree and even move 'Objects' (Jobs, Quotes, etc) out of lists.

Reordering Navigation Tree
To reorder your Navigation Tree, simply select an object (tree root node) and drag it up or down to where you would like it to be. For example, you may mainly work with Schedule, Email, Jobs. In this case, select 'Schedule' in your Nav Tree, and drag it to the top above 'Jobs'. Do the same for 'Email'. You'll notice that the Ribbon also automatically reorders to match your Nav Tree layout.

The Nav Tree reordering changes are at a 'user' level, that is, they only affect your Nav Tree, not all users, and are also reflected in your Jim2 Mobile.

To restore your Nav Tree to the standard default layout, right click on the Nav Tree, and select '**Reset to Default**'.

Reorder Lists
Often, you'll have several lists set up in your navigation tree, but depending on when you set them up, they may not be in your preferred order. For example, you may have several Job lists, with the last one being your 'Urgent' job list. Much like reordering 'root' nodes above, simply select your 'Urgent' job list and drag it above the job list into position one. The Job list icons will automatically be renumbered to match your new layout.

Move an Object from List
You have always had the ability to move an object (Job, Quote etc) from a list via the '**Transfer from List**' icon located in the ribbon's quick access toolbar, but in Jim2 v4.0 you can now simply drag an object (Job, Quote etc) from a list.
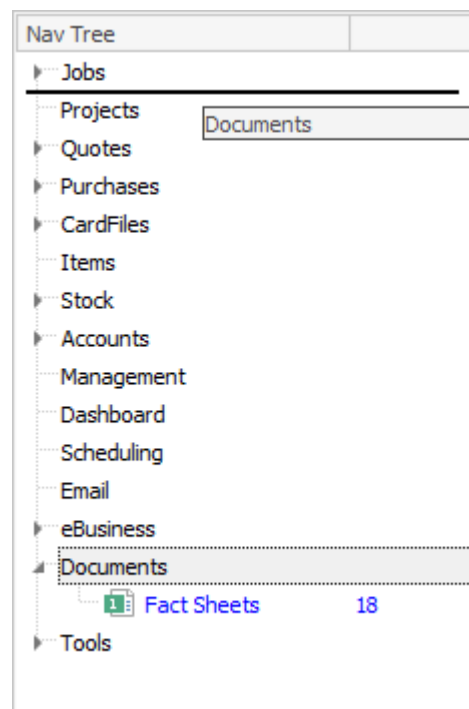
Unified and Live Object tabs

Common tabs on all Objects (Jobs, Quotes, Purchase Orders, etc) are now displayed as an Icon (rather than text), along with their relevant count, sum etc.
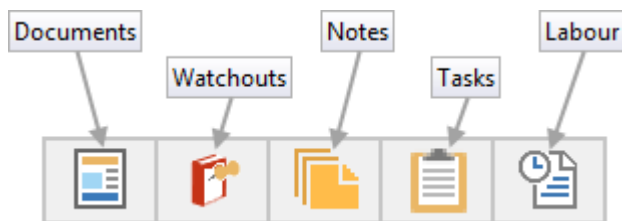
This provides a much cleaner and uniform look throughout, whilst providing a clear summary of the tab's relevant information.

Note: The tabs may change depending on the Object you are looking at as not all common tabs are applicable to all objects.

Objects and Supported features:

Object	Comments	Email	Documents	Watchouts	Notes	Tasks	Labour
Job	●	●	●	●	●	●	●
Return From Customer	●	●	●	●	●	●	●
Project			●	●	●	●	●
Quote	●	●	●	●	●	●	●
Purchase Order	●	●	●	●	●	●	●
Return to Vendor	●	●	●	●	●	●	●
CardFile			●	●	●	●	
Item			●	●	●		
Stock			●	●	●		
Stock Transfer	●	●	●		●		
Stock Adjustment	●	●	●		●		●
Stock Packaging			●		●		●
Stocktake	●	●	●		●		●
Debtors			●		●		
Creditors			●		●		
General Journal			●		●		
Document	●	●			●	●	●

New Documents Tab

The ribbon includes a new Documents Tab – please refer to Documents section of these notes.

Ability to rename Quotes

Quotes can now be renamed – Please refer to Quote section of these notes.

Status Bar Changes

The status bar now includes additional 'Labour' related functionality – see 'Timers and Labour Everywhere' section of these notes.

Create a List from a Hyperlink

Jim2 has always had a neat little 'Hyperlink' feature, where on Job, Quote, etc, you click on the Cust# label and are presented with a dropdown menu to go directly to that CardFile, or Debtor.

This has been enhanced in Jim2 v4.0 to allow quick creation of a List for the CardFile, with a new 'Create List' feature. Clicking on 'Create List' will automatically create and run a List for that CardFile.

This feature is available from:

Object	Field Label	Description
Job	Cust#	Create a List of Jobs for that Customer
	Ship#	Create a List of Jobs for that Ship/Site
Quote	Cust#	Create a List of Quotes for that Customer
	Ship#	Create a List of Quotes for that Ship/Site
Purchase Order	Vend#	Create a List of Purchase Orders for that Vendor
	From#	Create a List of Purchase Orders for that From# CardFile
Project	Cust#	Create a List of Projects for that Customer CardFile
	Ship#	Create a List of Projects for that Ship/Site CardFile

Documents

Jim2 v4.0 includes full document management. You will now have the ability to attach documents (Images, PDFs, Office documents, any files) to anything in Jim2. Things like images, brochures, manuals, certificates, plans, licences, etc can be stored and easily located against Jobs, Stock, Quotes, CardFiles, and more. Documents includes full version control, security, and drag/drop functionality. You can literally drag a file onto a Job.

Features include:

- Full Document management including version control, security, and drag/drop functionality
- Supports any type of Document including PDF, images, Word, Excel etc.
- Security can be set at both user and security group level
- Documents can be linked to Jim2 Objects (Jobs, Quotes, Stock etc.)
- Ability to add Document Groups, Categories, and Tags
- Special support for 'Signed' documents (signed reports via Jim2 Mobile)
- Hidden Documents
- Document 'Usage' including number of links, and email count
- List and folder view as per Windows Explorer
- Related documents
- Updated document emailing functionality
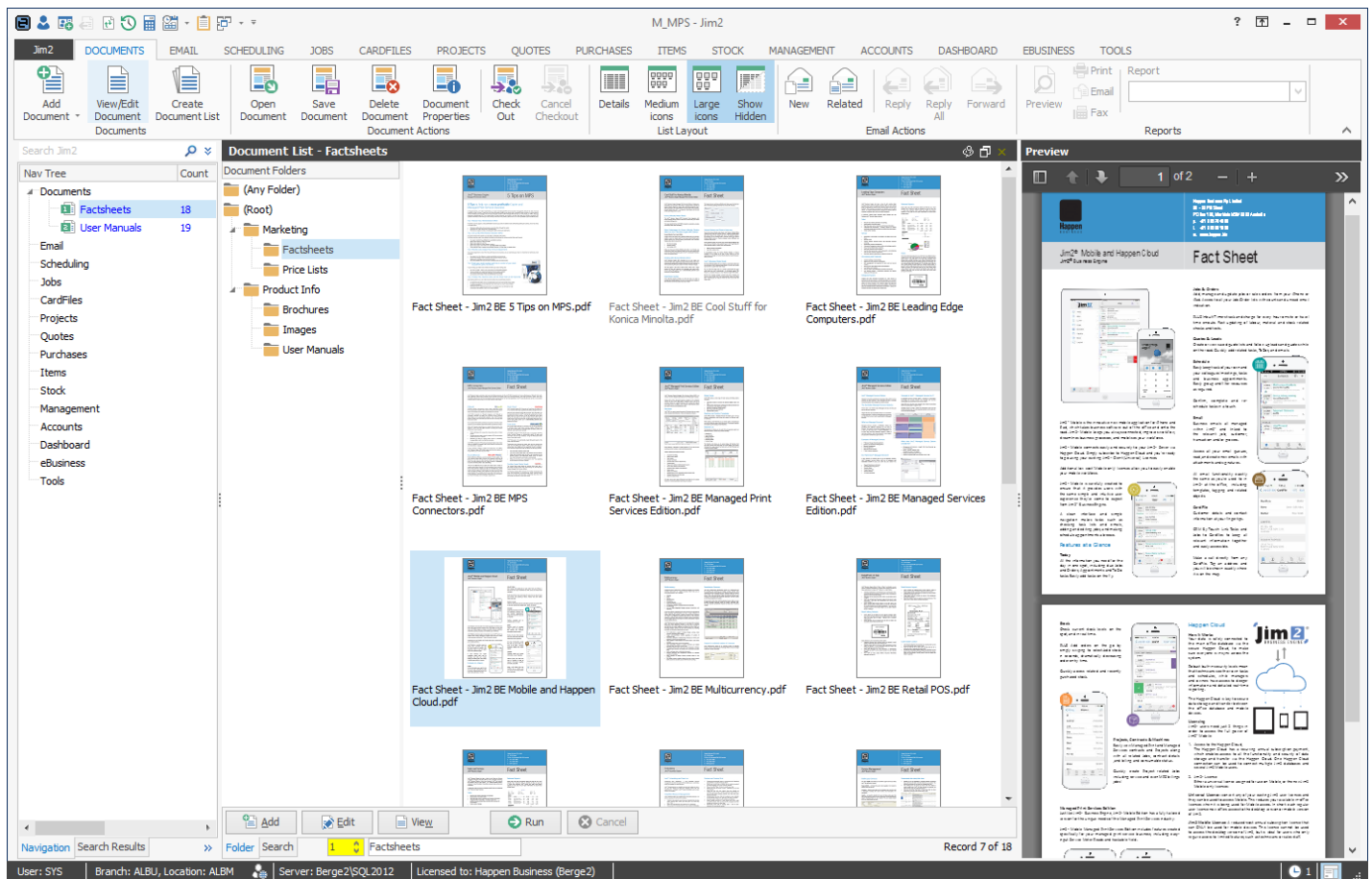
Documents Overview

What is a Document?

A document can be any file or external link to a file (or URL/weblink). This includes all the usual suspects like PDFs and Office documents (Word, Excel etc), images, as well as things like external emails, zips files... literally any type of document or file.

In practice you'll find your documents will be divided between standard 'company type' documents, like fact sheets, price lists etc, and Object specific documents, like a Word document, or signed acceptance related to a specific Quote, or the User Manual or images related to specific Stock, for example. There is no actual difference between these, but typically Object specific (or more precisely linked documents) would be marked as 'Hidden', meaning they would be filtered out of Document Lists by default.

A document can also be linked to one, or as many objects as you like, in which case the Document would normally be viewed from the related Object. So, for example, when viewing a Stock, all its related Documents are easily accessible from that Stock's document tab.

Documents in User Interface

The first thing you'll notice is the new Documents ribbon tab and associated Documents 'node' in the Navigation Tree. Clicking on the Documents tab, you'll find three Document specific ribbon tab groups, the usual Add, View/Edit and Create List functions common throughout Jim2, followed by Documents Actions, and then List Layout.
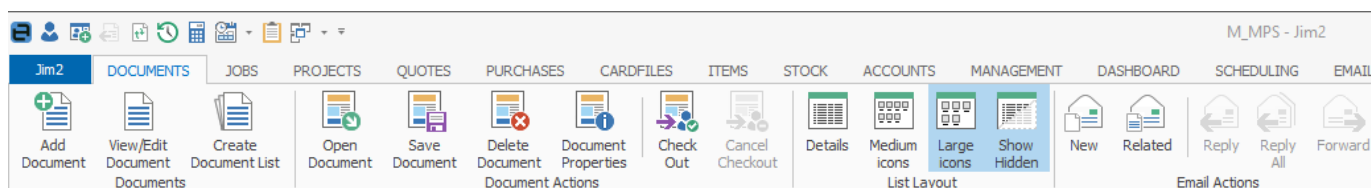
We'll run through these in detail, but you may wish to hover you mouse over each icon to view its screentip to get an idea about each icon's function.

Version Control

Documents includes version control functionality. This allows you to keep several revisions of a document, with the most recent version being the current version. Version control is useful for things like Price Lists, or Agreements, where it is easy to refer back to previous revisions. It is also useful where 'formal' document management is required, for example a 'quality control' system (ISO 9000 etc) where there is a requirement to version control your procedure documents.

Version control also gives you the ability to control the editing and updating of documents via a check out/check in process. A document is '**Checked Out**' to a specific person, updated, and then '**Checked in**'. Documents use Jim2's workflow methodology with the use of Status.

'**Checked Out**' documents are easily recognised as they are highlighted in red in lists etc, and are on the '**Check Out**' system status, allowing easy filtering and searching in lists etc.

A log of a Document's Check Out/Check In history is seen in the document's related comments, and also the Jim2 history log.

A Document 'Check Out' can be cancelled, or if checked out by another user, the 'Check Out' lock can be 'stolen'.

Document Options

Document options are configured via **Tools > Options > Documents.**

Option Setting	Description
Maximum Document Size	Default = 10 megabytes (mb) This option sets the maximum document size that can be added to your Jim2 database.
Maximum Document Versions	Default = 10 This is the maximum number of revisions to a Document that Jim2 will track when using version control. Older versions will drop off (be deleted) if the revision count is exceeded.
Email Document as link	Default = Unticked When emailing a Document that has an external URL (eg. a copy is available on the web), a link to the Document will be inserted in the email rather than the actual Document.
Default Document Security by Security Group	Default = Unticked This setting controls the default security applied to a Document when added. If unticked, no security is applied by default. If ticked, the security is set for 'Everyone' and your security group will be applied. Note: Jim2 User Security overrides Document level security settings. If a user is a member of a security group that cannot view documents, that user will be unable to view any Document, regardless of the Document's security settings.

Documents and your Database

Documents are stored within your Jim2 'documents' database, along with other 'non accounts' related things like emails, vendor stock feeds etc. As such, it is important to control the number of documents, their size, and the number of revisions kept. This is especially important if you are running an 'Express' version of Microsoft SQL Server where a maximum database size restriction of 10GB applies.

Also note, that as Documents are stored within your Jim2 database, your Jim2 backup's size will increase accordingly.

Document Security

Document security is of critical importance as you may not wish all users to view, add, or delete all documents, or you may wish specific users to only view specific documents. For example, you may wish 'sales' related documents to be viewed by specific users, and only edited by sales managers. Or service technicians to be able to add and edit service related documents, with these to only be viewed by other staff members.
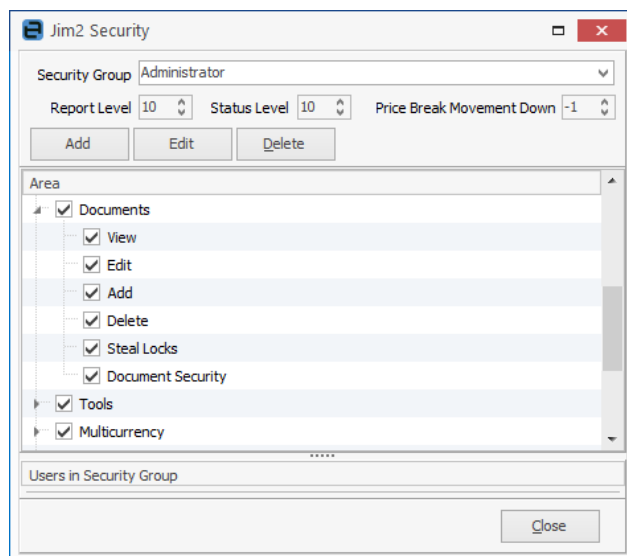
Security Group Settings

Document security is set at both a Security Group and Document level, with Security Group settings taking precedence.

The ability to Add, Edit, View, and amend overall Document security is handled via the Jim2 'traditional' security. By default, only users with administration rights have this ability.

The following additional security settings have been added:

Tools > Security > Documents

- View
- Edit
- Add
- Delete
- Steal Locks
- Document Security

Document Level Security

In addition to a user's document related security group settings, security to View, Edit, or Delete a specific Document can also be set for:

- Everyone
- Specific security groups
- Specific users

As noted above, if a user's security group is not allowed to view documents, they will not be able to view a document, regardless of the actual Document's security settings.

When adding a Document, the default security settings in **Tools > Options > Documents** will be applied. These can be overridden at point of adding the Document, or at a later date, depending on the user's document related security group settings, by clicking the Document's Security tab.

If a user or security group does not have the rights to view a Document, that document will not be visible, or available to view to them in any way. This applies equally to their ability to Edit or Delete, etc.
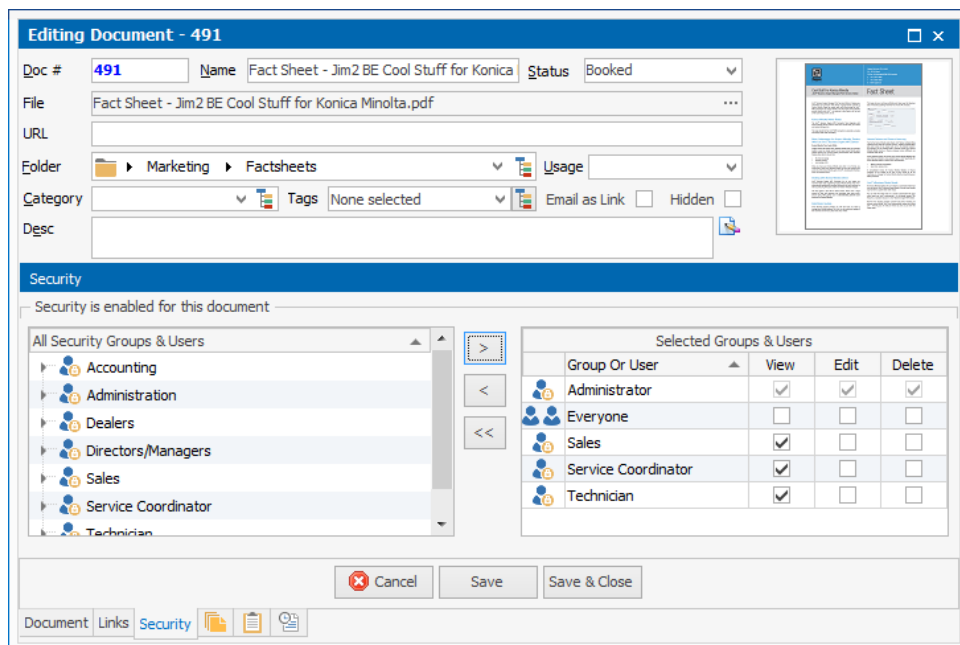
Document Status

Following Jim2's workflow methodology, documents are '**Status**' driven.

There are four inbuilt system status' :

Status	Description
Booked	The default status when adding a new document
CANCEL	The document has been cancelled
Check Out	The document is currently checked out
FINISH	The document has been completed

Additional document status' to suit your document workflow can be added via **Tools > Status > Documents**.

Folders, Groups, Tags and Categories

Documents makes use of '**Groups**', as used in CardFiles, Stock etc, with some slight variation in that report groups are basically regarded as folders. The concept of a folder is explained in detail under Document Lists.

Document Folders, Tags, and Categories are managed via **Tools > Groups > Documents**.

Folders are much the same as standard 'Report Groups', and can be up to 5 levels deep. Much like file folders under Windows, a document can only be in one folder at a time.

Example folders:
- Sales > Stock > Images
- Service > Technical > Manuals

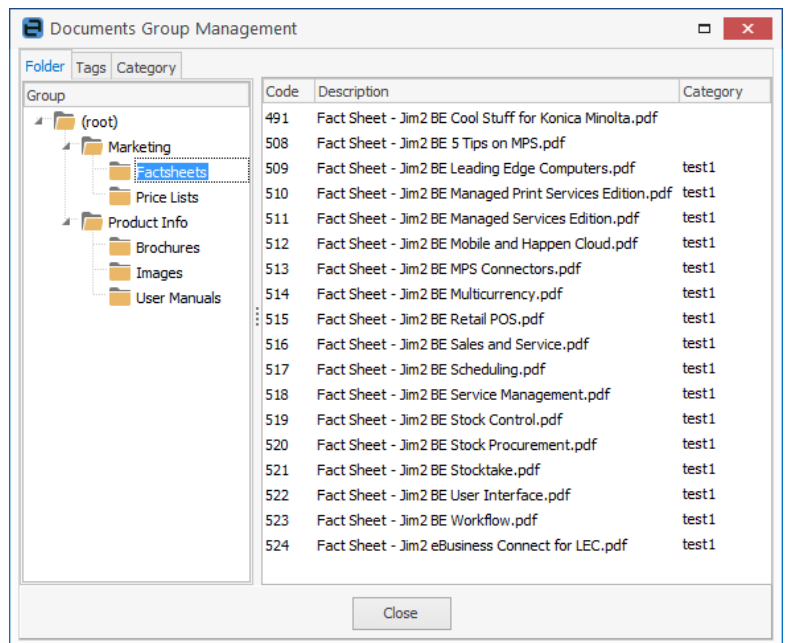Tags are much the same as 'Non Report' groups. Documents can have multiple tags. Example tags:
- English
- French

Category is much the same as 'Brand' or 'Region'.

A document can only be in one category.
Example categories:
- Plan
- Article
- Contract

Document 'Usage'

In addition to Folder, Tags, and Category, documents can also have a defined 'Usage'. There are three built in usages:

Usage	Description
Signed Document	The document is a 'signed' report, that is a report generated by Jim2 which has been signed by a customer and/or technician, and has been saved as a document. This feature is available via Jim2 Mobile.
Signature	The document is an image of a user's signature. This is used when signing reports via Jim2 Mobile.
Image	The document is an image. Typically used to identify a document as an image to be used on websites, etc.

The usage of usage (pun intended...) is mainly for filtering lists, and moving forward, default stock images, profile/avatars etc.

Documents within Jim2

Documents in Jim2 behave in a similar manner to most other things (Jobs, Quotes etc). The Ribbon has been updated to include a new Documents tab and corresponding Document node in the Navigation Tree.

Documents at a Glance

The Jim2 Document form is divided into the following specific information areas:

- **Header**   The Document information is found in the Document Header.
- **Comments**   Chronological records of status changes, comments, and related emails.
- **Footer**   The Document footer and related tabs (Versions, Links, Security, Notes, Tasks and Labour)

Header Fields

Field	Description
Doc#	A unique identifier automatically generated for each document that provides more precise identification than document name alone. This is an alphanumeric field, so can be typed over to match existing document numbers you may have, or any new 'coding' scheme. For example, you may wish to prefix your document numbers with PL.123, PL.124 for price lists, or FS.125, FS.126 for, say, Fact Sheets.
Name	The name of the document. Defaults to Filename less file path, and can be edited to a more 'friendly' name if required.
Status	The current status of the Document. Defaults to Booked. As per **Tools > Status > Documents**
File	The actually file path and name where the document was loaded from. Clicking the ellipsis (...) on the File field. An 'Open File' dialogue will appear, select the file you wish to add, and click 'Open'.
URL	The URL or link to an external document or external copy of the document.
Folder	The folder the documents is located in. For example: Marketing > Products > Brochures. Folders (akin to report groups) as per **Tools > Groups > Document Groups > Folder**
Usage	How the document is used. Default 'none'. See document usage section elsewhere in this document.
Category	The category related to this document. For example: Brochure, Plan, Price List, etc. Category (akin to Region, Brand etc) as per **Tools > Groups > Document Groups > Category**
Tags	The Tags related to this documents. For example: English, German, etc. Tags (akin to non report groups) as per **Tools > Groups > Document Groups > Tags**
Email as Link	If a URL is provided, email this document as a link to the URL, rather than inserting a copy of the actual document.
Hidden	Used to flag the document as 'Hidden'. This is typically used to filter out 'Object' related documents from document lists .
Desc	A brief description of the actual document.

Adding a Document

You can add a new Document in several ways, including the functionality to simply drag and drop a document (file) directly onto Jim2.

The traditional way to add a Document is as follows:

Click Documents on the Ribbon tab **(Documents > Add Document)** and click '**Add Document**'. A new Document will be created and allocated a unique document number (Doc#).
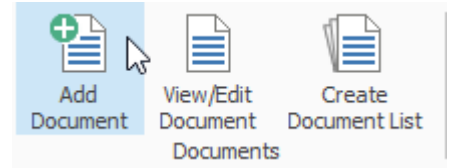
Documents can be loaded from a file, or simply point to an external file or website, or both. In the case of both, the file is available for viewing and maintaining within Jim2, with a copy stored externally located via the URL.

Load from File

You can upload your document by clicking the ellipsis (...) on the File field. An '**Open File**' dialogue will appear, select the file you wish to add, and click '**Open**'.

The file will be added, a Thumbnail image created (if possible, see below), and the Name and File fields completed.

At this point you can just click the '**Save**' button, and the document will be added, although you may wish to change the document's Folder, Category, Tags, and importantly, its security.
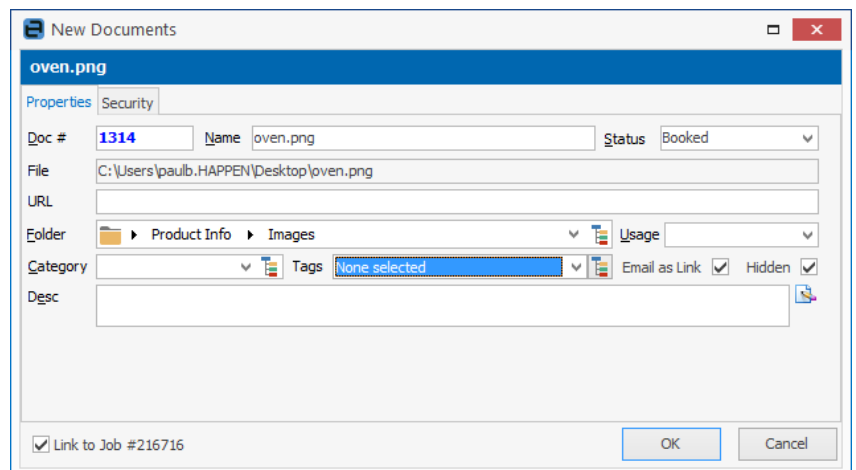
Load from URL

Much like adding a Document via a file, click **Documents > Add Document** and type or copy in the URL or weblink. As already mentioned, a document can be from a file (stored within Jim2), and have a URL linking to an external copy of the same file. This is used when inserting a document into an email using the link, rather than the actual file.

Adding a Single Document via Drag/Drop

This is by far the simplest and fastest way to add a new Document, especially if adding a document related to an object (Job, Quote, etc).

Open a Windows 'File Explorer' window (or from your Windows desktop, click and hold the file you wish to add). Now drag the file onto Jim2. When the cursor changes to a Plus Arrow, release your mouse button, and the '**New Documents**' dialogue will appear.

Fill out the required document 'Header' information, and click '**Save**'.

Adding Multiple Documents via Drag/Drop

You can add multiple documents in the same way as above by selecting multiple documents from Windows File Explorer using the standard Windows Control or Shift mouse click as follows:

From File Explorer, hold down the Control (CTRL) key, and click on the files you wish to add. Now click on one of your selected files, and drag them onto to Jim2, releasing your mouse button when the 'Arrow Plus' cursor appears.

The same '**New Documents**' dialogue will appear, allowing you to edit common properties (like Folder and Security) for all selected Documents.

Adding multiple Documents in this way is especially useful for bulk adding, for example, adding entire directory's worth of files in one hit.

Drag/Drop and Linking

Often, you'll have a file that is related to an object (Job, Quote, etc) in Jim2, and you want to add that file as a document linked to that object.

For example, you want to add a photo to a Job...

Open the Job in Jim2 and drag/drop the file directly onto the Job. The '**Add Documents**' dialogue appears with an additional ticked checkbox '**Link to Job # XXXX**', assuming you wish to add this document, and link it the open Job you have dropped it on.

Any object in Jim2 that has a 'Documents' tab can be a 'drop target', and can have linked documents.

All this drag/drop stuff sounds a lot more complicated than it actually is in practice. Simply grab a file with you mouse and drop onto Jim2!

Drag/Drop onto a Document

You might be thinking at this point, "What if I drop a file onto new or existing Document?". That's a perfectly ok thing to do...

- If the document is in add mode, the file will be added to that Document, much the same as clicking the File open ellipsis (...).
- If it is an existing Document in Jim2 of the same name we assume you are updating the Document, and the file will be added as a new revision (see Version Control).

Drag/Drop from other Programs

You can also drag files from other programs directly into Jim2, specifically Microsoft Outlook emails and attachments. Follow the same drag/drop procedure as above, selecting and dragging the attachment (or entire email) onto Jim2.

Drag/Drop from Jim2

As with Outlook, attachments to emails within Jim2 can be selected and drag/dropped, thus creating a new Document, and linking it to the open object (Job, Quote, etc).

This is especially useful when, for example, someone emails you an Office file (Word, Excel etc), that you wish to save directly against an object. Much nicer than sending versions of a file back and forth via email...

Additional Document 'Add' features

When a Document is added to Jim2, it is checked to see if it is unique. That is, that there is not another exact Document of the same name already existing. If that exact Document already exists, you'll be prompted to add it as the latest revision.

Document Lists

Document Lists are much like other Lists in Jim2, but with increased functionality. They can be Pinned, Named, Live etc, and you can have maximum of twenty open at the same time.

Folder View

By default, a Document List opens in '**Folder**' view, providing a tree of Document Folders, and a list of Documents in the selected Folder. Additionally, a preview of the currently selected Document appears in the Preview Pane.

Clicking on a Document Folder automatically reloads (runs) the list, displaying the related documents within that folder.

There are two special folders that are always present in Document Folders:

(Any Folder)
Clicking on (Any Folder) will display all Documents, regardless of what folder they are in.

(Root)
Clicking on (Root) will display all Documents not assigned to a folder. See 'Moving Documents' below.


Search View

Clicking on the '**Search**' tab opens additional search criteria and hides the Document Folders. In this case the List behaves the same as a standard Jim2 List. Enter search criteria, and click '**Run**'.

List Layout

The layout of how Documents are displayed in a List can be changed via the ribbon Document Tab's 'List Layout' group.

The available layouts are:
- Details
- Medium icons
- Large icons
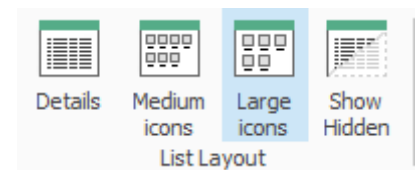
An additional icon in this ribbon group '**Show Hidden**', displays all documents including documents flagged as 'Hidden'.

All four of the 'List Layout' functions are list specific.

As noted previously, a document's 'Thumbnail' image is generated automatically when creating a new Document.

Multi–Select

Document lists allow multi–selection using the standard Windows CTRL or SHIFT + Left Mouse Click. This is particularly useful when wishing to delete Documents, or move them to another folder.

Moving Documents

Document list allows quick and easy moving of one or more selected Documents from one folder to another.

Move one or more Documents as follows:
- Open a Document List in Folder View
- Select one or more Documents within the list (see Multi–Select)
- Drag/drop the selected Documents onto the desired Document Folder

Deleting Documents

Delete one or more Documents as follows:

- Open a Document List in 'Folder View'
- Select one or more Documents within the list (see Multi–Select)
- Click the '**Delete Document**' icon in the Document Actions ribbon tab group (**Documents > Delete Document**).
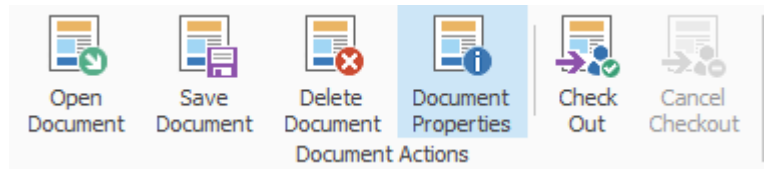
Document Preview

The Preview Panel located on the right–hand side of your Jim2 desktop displays a preview of the selected Document in a Document List, and selected Document within an Object's (Job, Quote, etc.) document tab.

Built in File Types

The previewer natively supports the following file types:

File Type (extension)	Description
PDF	Adobe Acrobat Document
TXT	Text
HTML, HTM	HTML (or HTM) Document
BMP	Bitmap Image
PNG	PNG Image
GIF	GIF Image
JPEG	JPEG Image

Other File Types

All other file types including Word, Excel, etc are previewed via Windows File Explorer preview plugins. This means that Windows typically needs that application installed for the file to be available in the Jim2 Document Previewer.

In practice this not generally an issue, as many viewers, for example Word, are freely available for download.

Many Windows applications include Windows File Explorer preview plugins. I was pleasantly surprised that after installing 'WinZip' on my computer, zip file documents were automatically available in the Document Previewer.

Speed with Crash Protection

As some documents are previewed via Windows Explorer file preview plugins, it is possible that the actual plugin (provided by a 3rd party) may be unstable or crash. As it is completely unacceptable for a 3rd party file previewer to take down the main Jim2 application, the Document Previewer is 'Sandboxed', meaning it runs independently from the main Jim2 application, and will restart as required if issues are encountered.

As an added benefit of 'Sandboxing' the Previewer in this way, the actual loading and previewing of Documents does not affect the performance of Jim2.

You may notice one or more instances of 'Jim2 Business Engine Previewer' (or the 32 bit version) running within Windows Task Manager when the Previewer is active. This is completely normal and they will be automatically started and terminated as required.

Documents and Objects

Most objects (Jobs, Quotes, etc) support linked Documents. This is useful for documents that are specific to the Object.

Some examples:
- A picture of a faulty product linked to a Service Job
- A signed service report linked to a Service Job
- A signed delivery docket linked to a Sales Job
- A product picture linked to a Stock
- A Network diagram linked to a Project
- A signed acceptance linked to a Quote

In fact, any type of file, linked to most anything!

A document in Jim2 is just that, a standalone Document, and it can be linked to none, one, or many Jim2 objects.

Adding a Document to an Object – Drag/Drop
Typically, if adding a document to an Object (say a Job), you would view the Job, and drag/drop the file directly onto the Job.

This Document would normally be flaggd as '**Hidden**', meaning it won't be displayed in a Document List unless the List's '**Show Hidden**' icon is selected.

The Document is now available via the Job's **Document tab**, and the Document tab displays '**1**', indicating the Job has one linked Document.

Adding or Linking an Existing Document to an Object – Document Tab
You can manually add or link to an existing Document directly from the objects' '**Document tab**' as follows:
- Open the object in '**Add**' or '**Edit**' mode
- Click the '**Documents tab**'
- Click '**Add New**' or '**Link Existing**'
- Select the Document

Unlinking and Deleting a Document from an Object
You can also unlink ('Remove Link') or 'Delete' a Document from an object in the same way:
- Open the object in '**Add**' or '**Edit**' mode
- Click the '**Documents tab**'
- Select the Document from the grid
- Click '**Delete**' or '**Remove Link**'

Documents related to an Object

When viewing an object (job, Quote, etc.) all Documents related to that object are available from the object's Documents tab.

Addition Documents related to Objects:

Jim2 Object	Documents available from object's Documents tab
Job	• Job • Item • Project • Linked Quote • Previous Job
Quote	• Quote • Item • Project
Project	• Project • Item • Master Project
Stock	• Stock • Manufacturing Item • Service Item
Item	• Item • Stock (if linked) • Related Service or Manufacturing Item

Documents and Email

Just as you can attach files to an email, you can attach Documents in a similar way as follows:

Attach Document as a File

- Create a new Email, and click '**Select Document**'.
- The '**Document Select**' screen will then appear.
- Select one or more Documents and click '**Ok**'
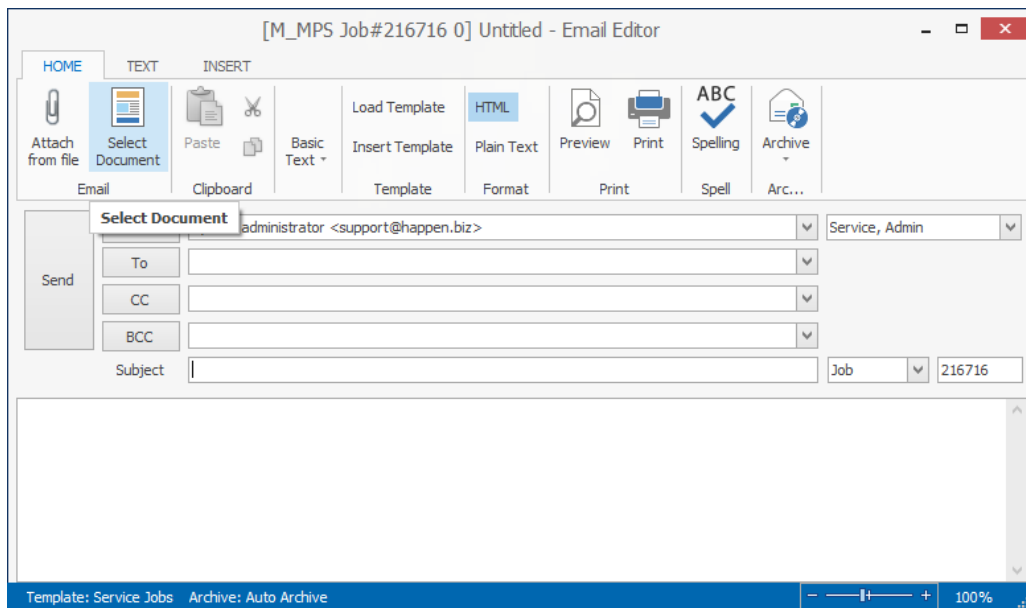
Attach Document as a Link

Rather than attach the entire Document to an email, you may find it better to insert a link to the Document. To do this, the document must have a URL pointing to a copy of the Document located on the web, and be flagged as '**Email as Link**'.

The document will be added as the Document Name, with the URL as the weblink.

Not only does this reduce the size of the Email, and possibly reduce the chance of the Email been flagged as spam, this will also reduce the size of your Jim2 database.

Ranking Documents

Jim2 automatically increases the 'Email' count whenever a Document is attached to an outgoing Email. It also increases the Document's 'Linked' count whenever the Document is linked to an Object (Job, Quote, etc). This provides an easy way to rank and identify popular Documents. You'll find this extremely useful in both sales and service environments.

The 'Linked' and 'Emailed' count is available in Document Lists, and on the Document itself.

Documents and Jim2 Mobile

Jim2 v4.0's new Documents feature also extends to Jim2 Mobile, with enhanced functionality to now include Signable Reports. All Documents within Jim2 are accessible via Jim2 Mobile, providing sales and service staff with instant access to valuable and relevant information.

Jim2 Mobile App

As in the Jim2 client, Jim2 Mobile now includes a 'Documents' menu, along with 'Search Documents', and 'Document Lists'.

A new 'Documents tab' is also available on Jobs, Quotes, CardFiles, and Stock, allowing quick access to related sales, service and contract related documents.

Documents can be viewed and emailed just like the Jim2 Client application, with the added benefit of delivering Documents via text message, iMessage, and directly to a customer's phone via Air Drop.

Signable Reports

Where Documents in Jim2 Moble really comes into its own is with Signable Reports. Reports in Jim2 flagged as 'Signable' can be presented to the Customer, and signed. The report along with the customer's (and optionally the Jim2 user's) signature is then saved as a linked Document, linked to the related object (Job, Quote etc), and is available for viewing, emailing, or even 'Air Dropping' directly to the customer.

Signable Reports are especially useful for Service Forms, Quote Acceptances, Delivery Receipts etc.

Timers and Labour Everywhere

When we released Jim2 Mobile, we included a neat labour timer feature. You open a Job, start a timer, and when finished stop the timer, instantly adding the labour time to the Job. This worked really well, and we quickly received requests for this same functionality to be extended to the Jim2 client.

We also had customers who wanted to track labour on things other than Jobs, like Quotes for example. They wanted to track the amount of time required to close a sale, and see exactly where their sales team was spending their time.

In Jim2 v4.0 we've taken this on board and added Timers, extending actual labour tracking throughout.

Labour Everywhere

As described under 'Unified and Live Object tabs', most objects (Jobs, Quotes, etc) throughout Jim2 now support the tracking and recording of actual labour.

All objects that support labour display the '**Labour tab**', which presents a running total of the actual labour added so far.

Status Bar – Labour Enhancements

The right-hand side of the Status Bar has been updated with several labour related features as follows:

Status Bar Item	Item Caption	Description
Actual Labour	Running total of Daily and Week to Date actual labour	'Actual Labour' displays Daily, and Week to Date running totals. This is updated automatically whenever labour is added. When clicked, provides quick access to Timesheets. Actual Labour must be enabled in options via **Tools > Options > Labour**, under **General > Labour**.
Add Labour	(none)	Provides a method of adding actual labour to a currently opened Object. Labour can also be added by clicking '**F7**'.
Labour Timers	Total of active Timers for currently logged user	Click to add, view and delete Labour Timers. Provides quick access to Labour Timers, and displays the number of currently active Timers.

Update Labour Display and Entry

As labour is now available throughout Jim2 v4.0, we have updated the entry and displaying of labour. Previously labour entry was only available on Jobs, and was entered by clicking the ellipsis '...' button on the labour total field, or pressing '**F7**'.

Now the running labour total is displaying on the object's '**Labour Tab**'. Labour can be entered by pressing '**F7**', or clicking onto the Labour tab, then clicking '**Add**'.

The Status Bar has also been updated to include an '**Add Labour**' button. The button is automatically enabled when labour entry is possible, depending on the object and mode, for example, when editing a Job.

Labour Entry Screen

The Labour Entry screen has been updated, and now includes several new features, related options, and improved functionality.

As noted previously, labour can be added to any object (Job, Quote, etc) that has a Labour tab. Labour can be added by clicking the Labour tab and clicking '**Add**', by clicking '**F7**', or clicking on the '**Add Labour**' icon located in the Status Bar.

The caption of the object's Labour Tab displays a running total of all related actual labour entries.

Labour Timesheet
Located at the top of the Labour Entry Screen is the new 'Labour Timesheet' and 'Calendar'.

Labour times can be selected by selecting a time range with your mouse. As you select a range the 'Start Date/Time' and 'End Date/Time' will be adjusted to match your selection.

The labour entry interval (width of timesheet selection in minutes) can be set via Options. Normally this is set to 1, 5, 6, 10 or 15 minutes, depending on the 'blocks' of time you typically work in.

Additionally, the starting time can be rounded to the nearest interval, for example, 5 minutes.

Adding Multiple Labour Amounts
You can add multiple labour entries at the same time by clicking '**Add Labour**', followed by your next entry. When all entries are completed, click '**Save & Close**'.

Adding Labour for Multiple Users
You can also easily add labour for multiple users by adding a labour entry, clicking '**Add Labour**', then clicking on that labour entry in the timesheet, and change the user's name. Then click '**Save & Close**', or '**Add Labour**' to add additional labour entries.

Starting a Timer
Rather than adding a labour entry, your may wish to 'start' a labour entry by clicking 'Start Timer' from the Labour Entry screen. The timer is then accessible via '**Timers**' on the status bar. Please see 'Labour Timers' below.

Labour Options
There are several labour entry settings that can be configured via **Tools > Options > General > Labour**.

Option	Description
Show Actual Labour in status bar	When ticked, Display Daily, and Week to Date running totals in Status bar
Display only working hours in labour entry	Default for labour Entry 'Show work hours only' When ticked, show only showing hours by default in the Labour entry Timesheet
Default Add to Comments	Default for labour Entry 'Add to Comments' When ticked, add any labour notes to comments
Default Labour Entry	Amount in minutes When adding labour, adjust the end time by this amount
Labour Entry Interval	Amount in Minutes The width of selection in Labour Entry Timesheet Typically 1, 5,6,10 or 15 minutes
Start time rounded to nearest	Amount in Minutes When adding labour, round the start time to the nearest X minutes. For example: if time is 2:01 round to nearest 5 minutes would set the start time to 2:00

Labour Timers

Labour timers provide a way to add actual labour to an object (Job, Quote etc) via a start/pause/stop timer. When ending a timer, the actual time is logged against the object.

Clicking the '**Labour Timers**' button, located in the Status Bar, displays the '**Timers**' form. A list of active timers will be displayed. From this screen, new timers can be added, and existing timers paused, stopped (completed), or deleted.

The caption on the Labour Timers button displays the number of active timers you (the logged user) have running. Timers are 'server side', meaning they continue to run when you exit Jim2.

Timers can be created, paused, and completed from any device. For example, it is quite acceptable to start a timer via Jim2 Mobile, and complete it when returning to the office via the Jim2 client.

Timers also have the ability to be paused. For example, you are onsite from 9am to 5pm with one hour 'paused' for lunch. Jim2 records the timer as a single labour entry as follows:

- **Start time:**   9am
- **End time:**   5pm
- **Actual Labour:**   7 hours
- **Paused time:**   1 Hour

Timers are also accessible by clicking '**Timers**' from '**Switch Windows**' on the ribbon's quick access toolbar, or when open, directly from the Windows task bar.

Adding a Timer Directly from an Object

You can also add a Timer directly from an object (Job, Quote, etc) by clicking on the object's **Labour Tab**, and clicking '**Add Labour**'.

The '**New Labour**' screen will then be displayed. Rather than adding a labour entry, Click '**Start Timer**'. The screen will close, and a new Timer will be created.

Time Sheets – Enhancements

Time Sheets has had several improvements, mainly in regard to support for labour for additional objects.

New Location

Firstly, Timesheets has moved. It is now located under the CardFile ribbon tab **(CardFIle > Time Sheets)**, given it is more about users and labour, rather than just Jobs and labour.

Additional Search Criteria

Additional Time Sheet selection criteria includes:

- **For**   Filter for selected Object type (Job, Quote etc)
- **CardFIle**   Filter for selected CardFIle (customer, vender, etc)

Apart from the support of labour across multiple objects, the CardFile selection allows you to see all labour related to a specific CardFIle for a given period of time, regardless of how that time was spent.

Additional Grid Columns

The actual Time Sheet has also been enhanced with the following additional columns:

Time Sheet Column	Description
For	Object labour is performed for, Job, Quote, etc
Ref#	The reference number for the object: Job#, Quote#, etc
Display Field	Which of the object's field is displayed: Cust#, Ship#, etc See **Tools > Options > General > Labour**
Field Value	The actual value of the Display Field of the related object

Time Sheet Options

As noted above, the Display field at an object level can be selected by '**Timesheet Display Fields for Object**' via **Tools > Options > General > Labour.**

For example, if the object is a Job, then display the Cust#. If the object is a Purchase Order ,then display the From#, etc

New Time Line

Time Sheets now include a 'Time Line' section, much like Labour Entry. When clicking on a row in the Time Sheet grid, the selected labour entry, along with other labour entries for that user, will be displayed in the Time Line.
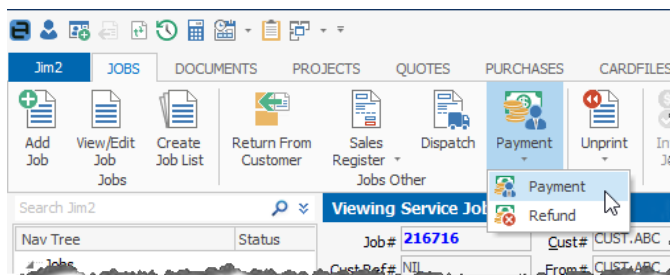
Job/Order Prepayments and Refunds

You can now add Prepayments directly against a Job/Order or CardFile, and do refunds, without having to go via Debtors. This is great for taking deposits from customers against a specific order, for processing laybys, and general retail/POS operations.

You can also take payments from customers for amounts outstanding, or simply take some money from them!

The Job/Order form has been updated to display the payments received and total balance owning. Related Prepayments are automatically allocated (as credits) at point of invoicing.

Additionally, you can refund customers directly from a Job, CardFile or RFC (Return From Customer) without having to go via Debtors, avoiding the need to enable security to debtors for sales and retail staff.

Both Prepayments and Refunds are located in the Job ribbon tab under the Payments button (**Jobs > Payment**), and also under the CardFile ribbon tab (**CardFiles > Payment**).

Payment/Refund Security
There are two new security settings related to the new payments/refunds functionality. These are set via **Tools > Security**.

Security > Accounts > Debtors
- Allow Prepayments on Jobs and CardFiles
- Allow Refunds on Jobs and CardFiles

By default both these security settings are disabled.

Note: If you have previously allowed staff access to Debtors List you may wish to review these security settings.

Payment/Refund Options
By default the new '**Prepaid $**' and '**Balance Due $**' totals fields on Jobs/Order are not displayed. These can be enabled at a global or workstation level via **Tools > Options**, and ticking **Jobs > Show Prepayments on Jobs**.

Adding a Prepayment against a Job/Order
To take a Prepayment against an order, first open the Job and then click **Jobs > Payment**. The Payment screen will then appear, and the payment can then be made in exactly the same way as taking payments at point of invoicing, except that the payment is linked to that specific Job.

There is no limit to how many payments you make against a Job/Order, or what payment method(s) you wish to use, including EFTPOS payments via Tyro or PC–EFTPOS.

Invoicing a Job with Prepayments

The invoicing process of Jobs with related Prepayments is as per normal, with the exception that the related payments will automatically be applied. This is the same process as clicking the 'Apply Credits' button on the 'Payment Details' tab of the invoicing form.

Adding a Payment against a Customer

As well as taking a payment against a Job, you can also take a payment against a customer. For example, a customer comes in to pay their account off, or you simply want to take some money from a customer as a Prepayment not directly related to a Job/Order.

To take a Prepayment against a Customer, first open their CardFile, then click **CardFile > Payment**. The Payment screen will appear, and the payment can be made in exactly the same way as taking payments at point of invoicing.

When taking a Prepayment against a customer, the payment screen includes additional information, including their amount overdue and total account balance.

Prepayments and Debtors

All payments via the above methods are accessible via Debtors, where they will appear as type Prepayment, not type Credit.

Additionally, if the payment was created from a Job/Order, the Job/Order number appears in the Document# column of the Debtors Payments grid. In this case, you can then right-click on the payment, and view the related Job/Order.

The payments will always go via '**Unbanked Funds**' and will appear in Bank Deposits. If a workstation is associated to a Till, the payment will go via that Till.

Doing a Refund

As with payments, you can do a Refund for a customer by clicking **Jobs > Payment > Refund**, or **CardFile > Payment > Refund**. The '**Select Prepayments to Refund**' form will then appear, allowing selection of which payments you wish to refund.

What is displayed differs depending on what you are viewing when clicking '**Refund**' as follows:

Object	
Job	All Prepayments related to that Job
Return From Customer	All Credits related to that RFC
CardFile	All Prepayments and RFC related Credits related to that CardFIle

The 'Payment By' is taken into account when doing Refunds via this method, as the refund will be processed via your linked 'Unbanked Funds' GL account, and will appear in 'Bank Deposits' as a negative figure.

Only Payment Types flagged as '**Allow Negatives**' are available for refund. Refer to **Tools > Setups > Banking > Payment Types**.

Additionally, in the case of refunding a Prepayment, the refund payment type will always be the same as the payment type made at Prepayments. For example, if the customer originally paid by Cash, the refund will be by Cash.

More 'complex' Refunds will need to be processed via Debtors. For example, you wish to do a Refund by writing a Cheque directly from a bank account.

Debtors – View Job from Prepayment

The Debtors 'Payments' tab has been updated. If the Prepayment was created from a Job/Order, the Job/Order number appears in the Document# column of the Debtors Payments grid. In this case, you can right-click on the payment, and view the related Job/Order.

Vendor Stock Feeds – Enhanced

Vendor Stock Feeds has received a major update and now includes the ability to handle feeds from hundreds of Vendors, updated searching, and the ability to link 'Unknown' vendors to CardFiles

New Suppliers Tab

The Vendor Stock Feeds '**All Suppliers**' now sports a new '**Suppliers**' tab. Clicking the tab displays '**My Stock**', and a list of Vendors that provide feeds. Select which suppliers to include by ticking/unticking the checkbox to the left of each supplier.

Right-clicking on supplier displays a pop–up menu that allows you to open that supplier, or all suppliers, in their own tab.

There are several other selections available in the pop–up menu including Select/Unselect, as well as the ability to delete a supplier from your feeds.

Multiple Vendors in the same Feed

Vendor Stock Feeds now includes the ability to handle multiple Vendors in the same feed. This is useful for buying groups and the like, where a collated feed is supplied.

Linking an Unknown Vendor to a CardFile

It is entirely possible when importing a feed, especially one that contains multiple suppliers, that a supplier code in the feed doesn't match up with an existing Vendor CardFile. For example, the feed contains 'Hewlett Packard', whereas you call the vendor 'HP'.

In this case, the feed will still be processed, and the suppliers that were unable to be linked will be displayed as <UNKNOWN> XXXX, where XXXX is the unmatched supplier. To link the unknown supplier, from the '**Suppliers**' tab located in '**All Suppliers**', right-click on the supplier, and select '**Link to CardFile**'.

Bank Reconciliation

The Bank Rec (**Accounts > Bank Rec.**) has been updated and now allows sorting, searching, and grouping of entries. Sessions can now be exported to Excel, and printed.

Sorting and Grouping

Sorting and Grouping is available as per other Lists in Jim2. Click on the grid's column header to sort, and drag a column header to the 'Group By' box to group.

Searching for Values

To search within the grid, simply click on a row/column value (grid cell), for example a value in the Deposits column, and simply start typing the value you are looking for. Once you have located a value, press Control + Down Arrow to locate the next matching value.

Export or Print a Session

To export or print a session, right-click on the grid, and select '**Export**', '**Print**', or '**Print Preview**' from the pop–up menu.

GST Sessions – NZ Support

The display of GST Sessions is now specific to your home currency. For example, if your home currency is NZD, you will now see the GST Session's Worksheet formatted as per New Zealand's GST reporting requirements.

Electronic Payments – NZ Support

Electronic Payments (**Accounts > Electronic Payments**) now supports the New Zealand bank file format.

Selection of the New Zealand bank file format is bank account specific, and is set by editing the bank account from **Accounts > General Ledger**, clicking on '**Bank Info**', and selecting '**NZDirect**' as the bank file format.

CardFiles have also been updated to support the NZ combined BSB + Account number format.

Quotes

Quotes in Jim2 has always been intended to be used for much more just producing a quote. It's core to Jim2's CRM and lead tracking abilities. We often get a response along the lines of, "I'm not actually adding a Quote, it's a lead, or an opportunity".

Rename Quote
Jim2 v4.0 now allows you to rename 'Quote' to be more suited to your business mindset. You can rename 'Quote' by visiting **Tools > Options > Quote** from the ribbon and editing the field 'I call Quote'.

Quote Type
You can now also specify the '**Type**' of Quote. The 'Types' are as per Job types set via **Tools > Setups > Jobs > Job Types**. Quote Type is also available in the Quote List header, grid details, and create similar function.

Dispatch

Dispatch has been updated, and now allows updating of 'Ship Via', Ship ref', and 'Cartons' on both invoiced and READY jobs.

Additionally, a new 'Run Dispatch Scripts' function allows the execution of custom dispatch scripts (based on Ship Via), to allow printing of custom dispatch stickers, or uploading of shipping information to carriers, etc.

Please contact Happen Business for further information if you require automated integration of your carriers.

Stock

Default Base Unit Measure
You can now override the default base unit when adding Stock. For example, rather than 'UNIT', 'EACH' or 'PER'. This is set via **Tools > Options > Stock** and changing '**Default Unit Measure**'.

Multiple Barcode support for Serialised and Special Stock
Both Serialised and Special Stock now support multiple barcodes. You can select up to three barcodes per Stock.

Shorthand Stockcodes
A neat trick with barcodes is the ability to use them for 'shorthand' stock codes. This feature has been available for some time, and now also works with serialised and special Stock types.

For example, you have a Stock with a Stock code of 'AA11X129875' which is a blue 5 metre cable that you sell regularly. Add a barcode to that Stock ,say, 'B5'. When adding the Stock to Jobs/Quotes etc, simply type 'B5', rather than having to remember or search for the stock code. Make sure you make the Unit Measure and Unit Qty the same as your base unit measure.

Stock List

The Stock List now includes the ability to flag Stock as Active or Inactive. Simply generate a Stock List based on any selection criteria, right-click on the grid, and select '**Flag Stock as Active**' or '**Flag Stock as Inactive**' from the popup menu.

Stock Procurement

Average Monthly Transfers
Stock Procurement now includes a new column, '**Avg Monthly Transfers**', which displays the number of units transferred from (out of) that location per month. When ticked, the '**Transfer (From) in averages**' option in '**Calculation Options**' will include this figure in the '**Avg Monthly Sales**' figure.

Transfer From Info
Additionally, the '**Transfer from**' rows now include their '**Current**' and '**Statistics**' figures, allowing a better understanding of whether you have enough stock to transfer from a given location. For example, transferring from QLD to NSW, where QLD has 200 units, but only 7 days both of stock, based on Sales/Transfer averages.

Stock Transfer

Stock transfer now includes '**Due Date**'. Great for transfers interstate or overseas, where it may take some time for the transfer to arrive. The new '**Date Due**' field is available on the Stock Transfer header, and within the Stock Transfer List.

Email Rules – Process as Order

Email Rules has been updated, and now includes a new '**Process as order**' email action. The purpose of this action is to simplify the processing of incoming XML orders by making use of the Jim2 incoming email functionality.

The new '**Process as Order**' email action provides much better control and visibility of email order processing within Jim2, and negates the need to use **POP3ToJes**.

All existing email conditions and actions apply when using the '**Process as Order**' action.

In basic terms, an email with an attached XML order comes in via email and is process via email rules. If the email rules conditions are meet, the '**Process as Order**' email action places the email attachment (eg. XML order) in the incoming eBusiness queue for processing. Once the XML order is placed in the incoming B2B queue, the normal Jes XML order processing then occurs.

As with all incoming emails, the email can be tagged, viewed via an email folder, and then optionally deleted after a certain amount of time, etc.

Note:
The 'Process as Order' email action requires Jim2 eBusiness Link for orders to be processed.
POP3ToJes is now deprecated, and has been replaced by the 'Process as Order' email action.

Jim2 Help File

The Jim Help file has been completely updated, including a new look. Be sure to check it out by clicking the '**Help**' icon located in the top right of the ribbon, or by selecting '**F1**'.

Updated Security settings

The following additional **Tools > Security** settings have been added or updated:
Security > Accounts > Debtors
- Allow Prepayments on Jobs and CardFiles
- Allow Refunds on Jobs and CardFiles

Security > Documents
- View
- Edit
- Add
- Delete
- Steal Locks
- Document Security

Security > Tools > Options
- Documents

Security > Tools > Groups > Documents
- View
- Manage

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

Updated Options: All Editions

The following additional **Tools > Options** settings have been added or updated:
Options > General
- Main Database Accent Colour
- Training Database Accent Colour

Options > General > Labour
- Default Labour Entry – minutes
- Labour Entry Interval – minutes
- Start time rounded to nearest X – minutes
- Timesheet Display Fields for Object

Options > Job
- Show Prepayments on Jobs

Options > Documents
- Maximum Documents Size – MB
- Maximum Documents Versions
- Email Documents Size as Link
- Default Document Security by Security Group

New and Updated Reports

All system reports have been updated for Jim2 v4.0. In addition, the following reports have been enhanced:

- Account Inquiry > Account Inquiry – Detailed

- CardFiles > CardFIles > Statement

- Debtors > Debtors > Statement
- Debtors > Debtors List > Statement

- GST Summary > GST Summary > GST Calculation Worksheet

- Invoices > Invoices > InvoiceMeters – Master (Landscape)
- Invoices > Invoices > InvoiceMeters – Master Detailed (Landscape)
- Invoices > Invoices > InvoiceMeters – Master Detailed
- Invoices > Invoices > InvoiceMeters – Master
- Invoices > Invoices > InvoiceSale (Landscape)
- Invoices > Invoices > InvoiceSale (using Quote Stock)
- Invoices > Invoices > InvoiceSale
- Invoices > Invoices > InvoiceSaleSimple (Landscape)
- Invoices > Invoices > InvoiceSaleSimple
- Invoices > Invoices > InvoiceSaleSumm
- Invoices > Invoices > InvoiceService
- Invoices > Invoices > InvoiceServiceSale w Comments
- Invoices > Invoices > InvoiceServiceSale
- Invoices > Invoices > InvoiceServiceSaleSumm
- Invoices > Sales Register > Ship Label

- Jobs > Jobs > Job – Picking Slip
- Jobs > Jobs > Job Receipt
- Jobs > Jobs > Job–OnSiteSlip
- Jobs > RFC > Return From Customer (All Stock)
- Jobs > RFC > Return From Customer Total
- Jobs > RFC > Return From Customer

- Projects > Projects > Project Detailed
- Projects > MPS > Project Service History – Detailed
- Projects > MPS > Project Service History
- Project List > Project List – Project Detailed
- Project List > Project List – Project

- Purchase > RTV > Picking Slip – RTV
- Purchase > RTV > Return To Vendor

- Quotes > Quotes > Quote

- Stock > Stock Transfer > Stock Transfer
- Stock > Stock Transfer > Stock Transfer (Landscape)
- Stock > Stock Transfer List > Stock Transfer List

- Reports > System > Import CardFile
- Reports > System > Import Stock

Added:

- GST Session > GST Summary NZ > GST Calculation Worksheet NZ

Jim2 Training

Jim2 Training is readily available for your staff. We can facilitate sessions in a one-on-one setting or a group environment conducted at a location that suits your needs. Training can be arranged at our premises located at Mortdale NSW, on-site at your business premises or remotely via the web.

Please call Happen on 02 9570 4696 to enquire about training for yourself and your staff.