Jim2® Business Engine
Version 3.2 (all editions)

Release Notes

Jim2® Business Engine v3.2 release notes – 14/11/11

Welcome to Jim2 Version 3.2 – 'Email Integration'

Jim2 version 3.2 introduces many new features and enhanced functionality. Most significantly, Jim2 v3.2 includes full email functionality, new Windows aero style user interface, new Dashboard jobs widget, stock procurement enhancements, and more...

Email Integration
- Full 'Outlook' style functionality. Now supports incoming emails as well.
- Ability to assign CardFiles, create Jobs etc, based on email rules and auto link to jobs/quotes etc
- Security can be set at user or group level
- Emails can be tagged to Jim2 objects
- Emails will be summarised in the comments grid as comments, and can be viewed in the preview pane as the actual email
- Create a job etc. directly from an email
- Emails located anywhere in Jim2 can be replied to, or forwarded
- Invoices/statements can be emailed straight from Jim2
- New email description macros

User Interface
- Updated ribbon to Windows aero style (aero can be turned off if not required)
- New Jim2 Application menu
- Popup message window has a new design and no longer 'steals' focus
- Stock select much faster (when grouping set to zero)
- Improved skins and cleaner interface
- Accounts and Banking tabs merged
- New Preview Pane
- Navigation Tree quick expand/collapse

Lists
- Pinned lists will auto-run on login and remember previous settings
- Up to 20 lists per object
- Active list objects now in blue
- All lists now display 60% faster
- Now able to add comments to Finished Jobs
- Dates now saved as 'Today', 'This Month', etc.

Scheduling
- Scheduling User Interface enhanced and now located in ribbon
- Now automatically opens on startup
- Speed and responsiveness have been improved
- New reminder in lower right hand corner (pop ups remain)
- Task list now shows end date for recurring tasks

To Do List
- Allows editing of Managed Services Tasks

Stock Procurement
- Now able to exclude stock attributes on procurement when attribute information is not required
- Filter by purchase and/or job date due
- Exclude package and kits in sales/transfer figures
- Ignore lead times and reorder quantity when doing transfers
- Now unable to order from inactive vendors
- Purchase/Transfer in Sell units
- Handles new stock with limited sales history
- Allows for purchasing window using Min Qty Low/High
- Reorder Qty now at a location level
- New location level Limit Qty
- Displays average monthly sales and days in stock
- Bulk update procurement
- Updated User Interface and layout

Dashboard
- New Job widget – a quick way to view job stats over a period
- Security has been updated to allow selection of users and/or groups permitted to view

Dispatch
- Allows creation of dispatch lists and sessions based on invoiced jobs and method of shipment

Return From Customer
- Allows returns from multiple Invoices on the one RFC
- Allows returns with no invoice number
- New security settings

Return To Vendor
- Allows return from multiple purchases on the one RTV

Debtors/Creditors
- BPAY filter in Debtors list
- Bulk debtor payments – import or bulk entry of debtor payments
- Select multiple credits to apply to invoices (but not to specific invoices)
- Remember Last Payment Details
- Apply multiple credits
- View payment transaction details

Sales Register
- Include Debtor Purchase Orders

Invoicing
- Enter amount when payment by cash

GST Sessions
- Updated to handle new NZ GST charges
- Deferred GST now reports to 7A in GST Calculation Worksheet Report

Labour Entry
- Redesigned, larger and now resizable

CardFile – Quick Add CardFile
- Name field increased to 100 characters in length (was 50)

Stock and Purchasing
- Limits removed for bound attributes
- Vendor stock code increased to 50 characters in length
- Stock list now shows Price Group
- Multi-stock select now on Transfers and Purchases
- Serial numbers can now be automatically capitalised
- Auto add consignment stock to 'Consign Buy' Purchase Orders

Security
- Allow invoicing when customer is on auto credit hold
- Stock: Allows applying Price Discounts

Projects
- Billing now in lists sort order
- All billing now via Jim2 eBusiness Server (Jes)

Managed Services/MPS Projects
- New billing periods – can bill in weekly or fortnightly cycles
- Add Project in job when adding Job
- New columns: name, account manager, customer name
- Projects now easier to locate in Project Select
- New Prepaid Labour
- New Meter Copy Kit
- New stock macros – prepaid pages and master machines

Install, Upgrade and Update Process
- One upgrade file now for Jim2 Business Engine, Jim2 Server and Jim2 eBusiness Server (Jes)
- New Jim2 Install
- New Jim2 Upgrade
- New Jim2 Database Update

Welcome to all of our new Jim2 Users!
These release notes should provide some 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 the most from the new version of Jim2 Business Engine.

Getting Started in Jim2 v3.2

Things to know prior to upgrading

Typically Jim2 v3.2 will simply install and just run, however there are a few things to be aware of prior to running the upgrade...

Handling of Email

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. In 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 the 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

Jim2 now requires Jes to be installed on your server and an instance of Jes created for your database. The new update program will automatically install Jes if required. 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 3.5 Framework and Windows Installer 4.5 installed. The updater will check and confirm that they are installed, or will prompt you to install them if required. Requirements:

- **Microsoft .NET 3.5 Framework must be installed**
- **Windows Installer 4.5 must be installed**

Jim2 Client Prerequisites

Some new functionality requires the Microsoft .NET 3.5 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 3.5 Framework must be installed**

Microsoft SQL Server

As all emails are now 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 as such, but may be a problem if you are running the Express versions of SQL.

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 2008 were the limit has increased to 10GB. This can be done at any time after the upgrade.

Jim2 update

The Jim2 Update Process has been greatly improved and will check for any prerequisites, and step you through the process.
There is no need to download and install Jes separately. The new Jim2 Update will update your Jim2 ®, Jim2 Server and Jes instances in one process.

Conclusion

You should find that Jim2 v3.2 will install quickly and easily without any issues. Please contact Happen Business if you have any Jim2 installation issues.

Please refer to the section 'Installing Jim2 v3.2®' later in this document.

Features and Enhancements – All Editions

Email Integration

The handling of email in Jim2 v3.2 has changed significantly both in the way outgoing email is handled, and the fact that Jim2 now supports incoming email.

The idea behind Jim2 email integration is to provide helpdesk/ticket style functionality, and also to extend email functionality to all areas of Jim2 including service, sales, support, purchasing and accounts. Jim2 email integration also enhances CRM functionality.

Features include:

- Incoming and outgoing email
- HTML email editor with spell checker
- Supports attachments
- Incoming email rule processing based on conditions and actions
- Ability to automatically tag emails, assign CardFiles, and create Jobs based on rules
- Automatic linking of emails to Jim2 objects (Jobs, Quotes etc)
- Email templates for outgoing emails based on type of email being sent (eg. reports, support emails, etc)
- Email template macros, for example (Job.CustomerName)
- Emails lists and folders (support, sales, etc)
- Email security at user and/or security group levels
- Integration with Jim2 'objects', emails appear as comments
- Email preview pane
- Read/Unread in both email folders and normal lists (Unread emails related to Jobs, etc)
- Move emails (from sales to support)
- Retag emails (bulk add or remove email tags)
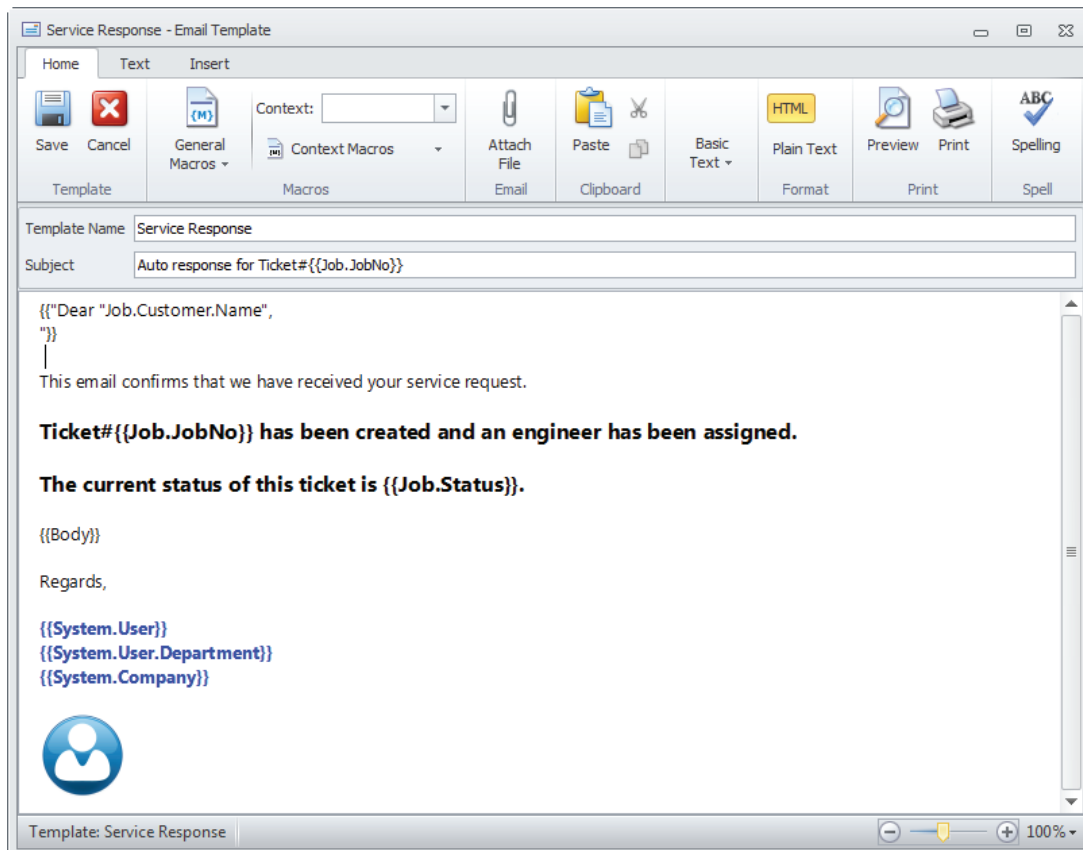
Email Overview

When designing the new email functionality in Jim2® v3.2 we decided to look at how businesses currently use email, and how that can be improved when fully integrated within an ERP system such as Jim2 ®. Given the nature of Jim2 ®, we wanted it to be much more process oriented and 'know' about things such as CardFiles, Jobs etc., as well as extend its CRM functionality.

One thing that is quite unique about Jim2 email is that it is not only focussed around who sent/received an email, and its 'status' (Sent, Deleted etc.), but what that email is related to (Sales, Service etc.), and also what objects it is related to (Job, Quote, Purchase, CardFile etc).

Email Queues, Ticketing, and Help Desk

This more focussed handling of email provides a very businesslike view of emails, and allows the creation of email queues, for example a service helpdesk, or a sales enquiries queue. In addition, emails sent from Jim2 can be related to one or more objects (Job etc.), and replies from that email are automatically related to, and can be viewed from, those objects. For example, all emails back and forth in relation to a particular Job are displayed within that Job. In addition, Jobs can automatically be created from an email, thus enabling a very comprehensive ticketing system.

Email Groups and Tags

Emails within Jim2 are normally 'Tagged' to one or more email groups. Tags can automatically be applied to emails when they are sent or received, or manually applied at any time. Emails can be tagged to one or many groups at the same time, for example both 'Service' and 'Sales'.

Emails can also be moved or retagged from one email group to another. For example, an email gets sent to sales@company.com but it is actually service related. In this case the email can easily be untagged from 'Sales' and retagged with 'Service'.

Email Group Tags provide a means of identifying and filtering emails and are used by email folders and lists (see below).

System Email folders

There are four global system email folders including: Inbox; Outbox; Sent; and Deleted. All emails within Jim2 will appear within the appropriate system folder, and therefore security on system email folders should be restricted to administrators.

For example, all emails sent from Jim2 will appear in the System Sent folder, regardless of who sent them or who the email was sent to.

Custom Email folders

Custom email folders are created via Tools > Setups > Email > Folders, and are used to display emails based on a number of certain criteria.

For example, emails sent and/or received from a particular email address, tagged as 'Service', and unread.

Email Lists

Email Lists are much like other lists within Jim2 with the exception that they must be based on an email folder. In a sense, the folder is used to filter an email list. It is quite normal to have several named live email lists. Email security is based on email folders, allowing for example, only sales staff to view sales related emails, or only accounts staff to see accounts related emails.

How do Emails become Related?

Emails are related to an object if sent directly from an object's comments grid or by clicking 'Related Email'. They can also be manually or automatically linked. For example, if an email arrives and it's a signed order, that email can be manually linked (or attached) to the related Quote. Replies from related emails sent from an object are automatically linked to that object (see Object Tags). Emails can also be automatically related based on rules. For example, if an email arrives from a certain email address and contains certain text, it can be automatically related to a specific CardFile or Project/Machine.

How do Emails get Tagged?

When receiving an email, rules can be applied based on almost any criteria, and apply certain actions to that email. The most common action is to tag that email to an email group. Therefore, if an email is received at service@company.com, Jim2 could automatically tag that email as 'Service'.

When sending emails, tags can be applied manually or automatically via 'Email Editor Rules'. Editor Rules include features such as, if sending an email related to a service job, tag it as 'Service', or if sending a statement or invoice, tag it as 'Accounts'. As mentioned above, emails can be tagged to multiple groups, and easily moved from one group to another.

Email Templates and Macros

Email Templates are used by the email editor and are text and/or attachments that can be automatically or manually added to a new email. A new email can be automatically based on a template depending on the 'type' of email to be sent. For example, if emailing a statement, automatically use the 'Statement' email template.

Email Templates also support the use of macros to automatically merge text. For example {{Job.Customer.Name}} will be replaced by the customer's name.

Email Setup and Configuration

Outgoing Email

All outgoing email is now sent via Jim2 eBusiness Server (Jes), rather than via the Jim2 client. That is, outgoing email is placed in a queue (system email folder 'Outbox') and then sent via Jes. Once email is successfully sent it is removed from the outgoing queue.

All email sent via Jim2 can be tagged to both Email Groups (definable via Jim2 Setups) and Jim2 Objects (Jobs, Purchases, Quotes etc), and related to CardFiles/Contacts.

Jes will attempt to send email out via an email account (if From: on the email is set to the email account) and if that is not applicable, it will send the email via the SMTP server setup in Options. Information about these settings follows.

Incoming Email

Incoming email accounts are configured via Jim2 Setups. These are email accounts that Jim2 will collect mail from. Typically these would be your 'generic' company email accounts, like support@company.com, sales@company.com, info@company.com etc.

Jim2 eBusiness Server (Jes) will collect email from these accounts and then process the email rules.

Email Accounts

Email accounts that Jim2 will collect email from and potentially send from. Email Accounts are created via **Tools > Setups > Email > Email Accounts**.

Incoming email requires POP3 to be enabled and details to be configured.

Outgoing email requires SMTP to be enabled and details configured. If no SMTP details for this account are entered, the global outgoing email STMP (as set in Options) will be used.

Adding the Email address to the Email accounts makes it available to be used when sending an email (it will be in the dropdown of the From:). This also signals Jes to send the email out via the SMTP server on the account if it is enabled, otherwise it will fall back to the defaults as set in Options.

Once the details are entered you can check the connectivity by clicking the 'Test' button.

Email Tags

Email Tags allow you to tag an email. For example, when an email is received from the support@company.com email account you may wish to tag it as 'Support', and it will therefore appear in the Support email folder (see below). An email can be tagged with multiple tags, so the email, for example, can be tagged with both 'Support' and 'Sales'.

Email Tags are created via **Tools > Setups > Email > Email Tags**.

Email Folders

Email lists work just like any other list within Jim2 with the exception that they must be based on an Email Folder. An Email folder provides a predefined list criterion. This also provides a method of enabling user security at an email folder level.

There are four predefined 'system' email folders that display ALL email regardless of email tags etc

Folder Name	Description
System Inbox	All incoming email
System Outbox	All outgoing email waiting to be sent or with a failed processing state
System Sent	All sent email
System Deleted	All email flagged as deleted

Email folders are created via **Tools > Setups > Email > Email Folders.**

Typically you would set up a number of predefined email folders, for example a folder called 'Support'.

Configuration of email folders is as follows:

Setting	Description	Example
Name	Name of email folder	Support, Sales, Accounts
Group	Email group (tag) related to this folder	Support, Sales, Accounts
Account	Email account related to this folder	Normally leave blank or select an email account to filter via emails received or sent via the selected email account
Sent Status	Only display email with the following sent status	Normally leave blank or select to filter via specific delivery status
Process status	Only display email with the selected process status	Normally leave blank or select to filter via specific process status
Read	Only display email with the selected read state	Normally leave 'greyed' Greyed – all email Ticked – Read email Unticked – Unread email

Note: Unlike other email clients, email folders can display both incoming and outgoing emails. It is not necessary to create separate 'Support Outbox', 'Support Inbox' folders for example, unless you choose to.

Email Options

Email options are configured via **Tools > Options > Email**.

Option Group	Option	Description
Email Receive	Enable Receive Email	Allow emails to be received (see below)
	Poll Every X minutes	Number of minutes between checking for new emails. Leave blank for default of 5 minutes
Email Send	Enable Send Email	Allow emails to be sent (see below)
	Default SMTP Server	Name of your default SMTP mail sever You can check that you are able to send out emails using the 'Test SMTP Connectivity' button.
	Port	Port number of your default SMTP server
	Max emails per minute	The maximum number of emails sent per minute is to throttle emails being sent. This is useful to avoid 'spam' issues with your ISP when, for example, emailing out monthly statements.
Email Fonts	HTML Font	Default HTML font for use in HTML emails
	Plain Text Font	Default plain text font for use in emails

Note: Enable Receive Email and Enable Send Email are automatically disabled (unticked) after restoring a Jim2 database. This is to allow for restoring training databases, etc.

Email Tokens

Email Tokens are used to automatically link incoming emails to the related Jim2 object in your database, for example, a Job.

Whenever a 'New Related' email is sent, or an existing related email is Reply/Reply All/Forward, an email token is automatically added to the email subject.

The format of the token is as follows:

[DATABASE OBJECT#XXXX Y]

Where **DATABASE** is your database name, **OBJECT** is the textual description of the related Jim2 object, **#XXXX** is the Jim2 object number, and **Y** is the internal Jim2 object ID.

For example:

[Happen Job#12234 0]

The actual text 'Job' is not relevant, but is provided to make the token 'friendlier'. The '0' on the end is the actual Jim2 internal object ID of a Job. The token was created in this way so that the email recipient does not need to be aware that the email is related to a Job, Quote etc., and the fact that objects within Jim2 can be renamed via Jim2 options. For example, you may have renamed 'Job' to 'Ticket'.

The database name is added to the token as it is entirely possible that emails are sent and received between different companies both using Jim2 ®. This also copes with the situation where a database is restored as, say, Jim_Training and email is inadvertently enabled.

When an email is received containing a token it will be automatically assigned to that object regardless. In this case Email Tags can be either assigned using the 'Add Group' or 'Auto Assign Groups' actions (see Email Rules – Actions for further information).

Email Rules

Email Rules – Introduction

Email Rules are the rules that are applied to incoming emails as they are received. Rules are based on conditions and actions. If an email meets the following conditions, apply the following actions.
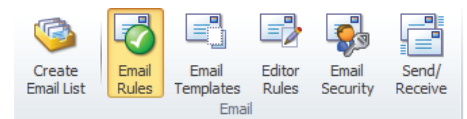
Email Rules – What can you do with them?

Email Rules provide an extremely powerful and flexible method of highly automating and actioning emails received by your business.

With email rules you can do things like:

From the Sender's Email address:
- Work out who an email is from and link it to the appropriate CardFile

From the Recipient's Email address:
- Automatically apply Email Tags to 'steer' the email into the correct area of your business (Support, Sales etc)

From the contents of the Email:
- Work out if it is related to a Project (MS contract, machine etc)
- Extract the customer's reference number
- Work out the nature of the email (Onsite service required for example)
- Work out if the request is Urgent

Based on running the above Email Rules do the following:
- Create a Service Job for the Project (MS contract, machine etc)
- Make the Job's priority 'Urgent'
- Set the Job's Cust Ref#
- Attach the Email to the Job
- Tag the Email with 'Service'

And the result of this...
An onsite service Job automatically created, linked to a Project/Machine with the email attached, AND with the unread email appearing in your email support list, AND with the Job appearing in your urgent Job List, flagged that it has an unread email.

From then on all email correspondence back and forth, regarding that Job, is automatically related, including the final invoice and even the payment advice back from the customer.

Email Rules – Overview

Email Rules are the rules that are applied to incoming emails as they are received. Rules are based on conditions and actions. If an email meets the following conditions, apply the following actions.

You can add as many Email Rules as you wish, and control the order that they are applied to incoming emails. Once a rule has been run, and its conditions met, you can choose to then stop processing any additional rules. This allows rules to be effectively 'chained'. For example, you may have the first rule to simply determine the CardFile to be related to the email, and then apply additional rules to apply Email Tags, and then even more rules to create a Job etc.

Typically you would have the first two rules as follows:

Rule 1: Determine CardFile from Email

This rule will apply to all incoming emails and attempts to match the sender's email address to a CardFile in Jim2 ®.

Note: This rule is automatically created when you upgrade to version 3.2.

Once this rule has been processed, the second rule will be executed.
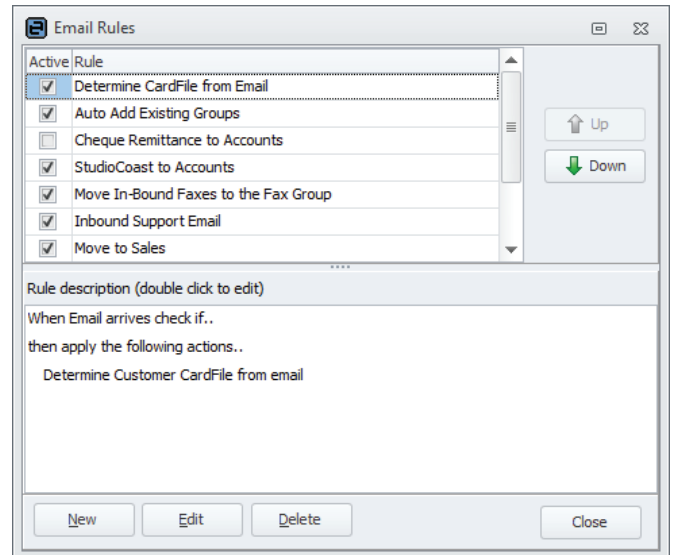
Rule 2: Auto Add Existing Email Tags

This rule will check if the email is related to an existing Jim2 object (Job, Quote etc.) and if it does, will apply the tags from any existing emails related to that object.

The email is related to the Jim2 object because it has an Email Token in the subject.

You can add, edit and view Email rules by selecting the ribbon's Email tab and by clicking **Email > Email Rules**.
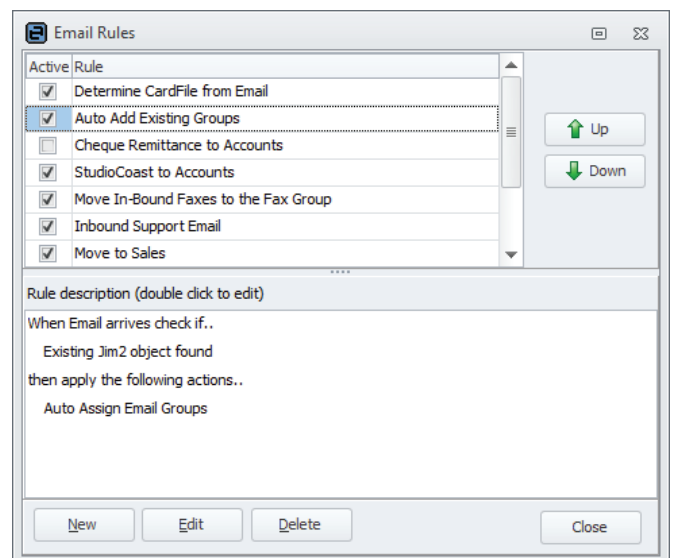
Example Rule: Create Job from Email

This example rule does the following:

Conditions:
Check that the email was sent to, or via, support@ and that it is not related to an existing Jim2 object (Job, Quote etc).

Actions:
If the above conditions are met then tag the email as 'Support'.

You'll notice there is one more action to this rule, Create Job, but it is flagged as <Manual>. This means that this action applies to this email but don't automatically do this action.

When viewing the email from an Email List, it is flagged that there is an outstanding action. The email can then be qualified (eg. this is a real support email), and then the action manually run, at which point a Job is created.

Note: Delete and purge email action to remove spam.
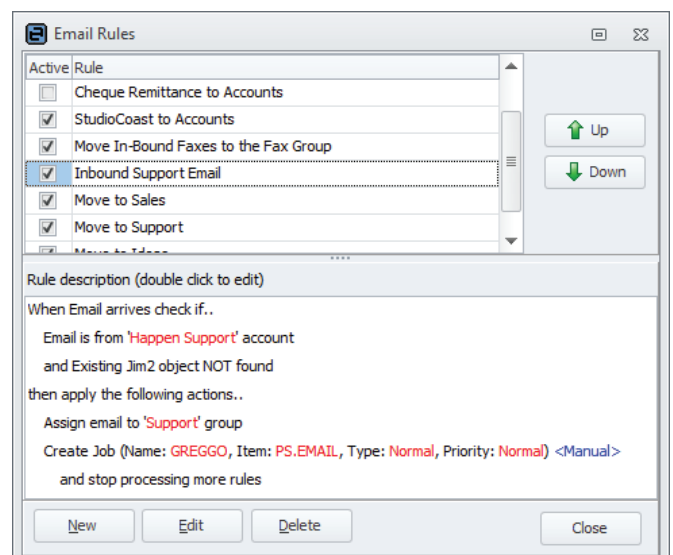
Email Rules – Creating a Rule

Let's create a new Email rule that will apply an Email Tag to the email if the email is via a specific email account.

Select **Email > Email Rules** and click '**New**' to add a new Email Rule. The Rule Wizard will then be displayed.

Step 1 – Conditions

Firstly, select the conditions that apply to this rule:

Select '**Via specific Account**', then select the email account you wish to use, and click '**OK**'.

You'll notice that an 'English' description of the rule appears in the lower section of the rule wizard.

Click '**Next**' as this is the only condition we wish to use.
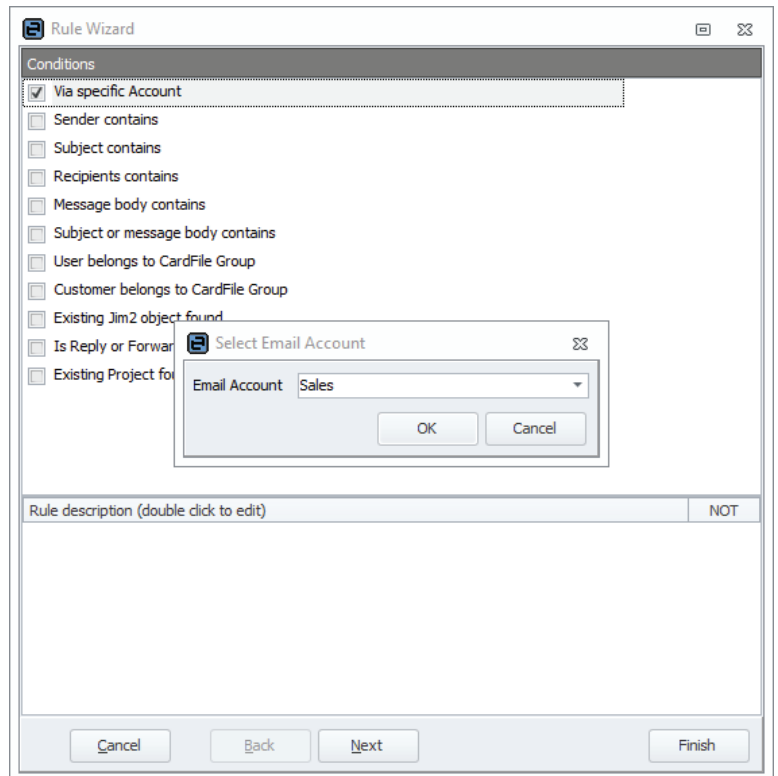
Step 2 – Actions

Next we are going to select the actions that apply to this rule if the conditions are met.

Select '**Add Group**' and click '**Add**', then select the Email Tag you wish to use, and click '**OK**'.

You'll notice that the action is flagged as 'Auto Run'. Click '**Next**' as this is the only action we wish to apply to the email.
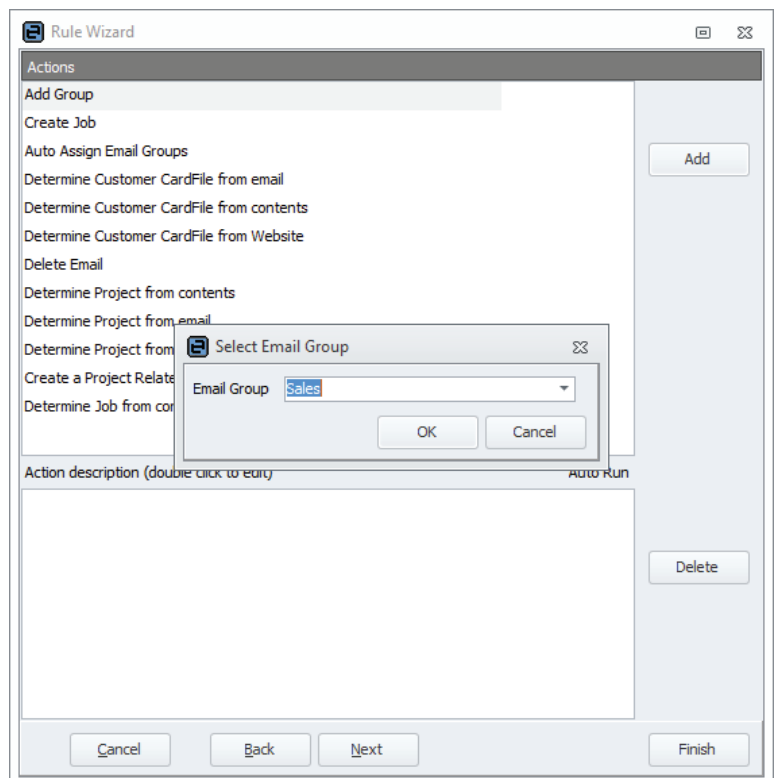
Step 3 – Summary

Next, we'll give our new rule a name and enable this rule.

Enter a name for your rule. The rule name should be short and meaningful, such as 'Tag as Sales', for example.

You'll notice that the rule is enabled by default. At this point you are given the option of stopping other rules running once this rule has been executed.

In this example we are simply checking which email account the email came via and based on that information, flagging the email with a specific Email Tag. The next rule in order would then be executed.

Step 4 – Finish

Click '**Finish**' to add your new rule.
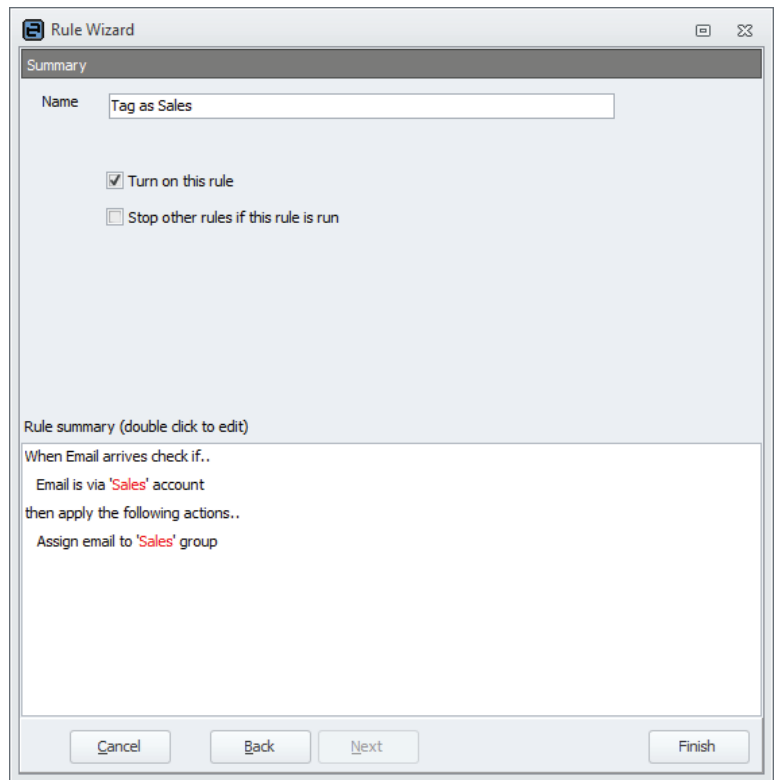
Email Rules – Execution Order

The execution order of Email Rules is important. Generally you would have 'basic' rules that apply to all incoming emails executed first, and then more 'complex' rules that perhaps create a Job.

Generally, after running a specific complex rule you would stop the execution of any further rules by ticking '**Stop other rules if this rule is run**'.

You can change the execution order of email rules by clicking the **Up/Down** buttons to the right of the rules on the Email Rules screen.
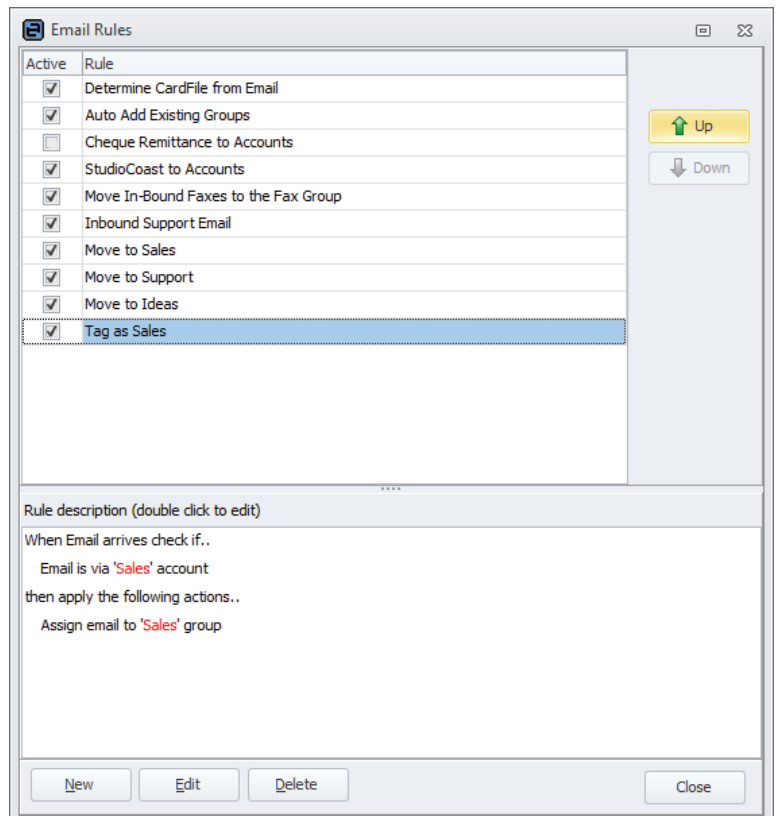
Email Rules – Conditions

Following are short descriptions of the Conditions when Creating Email Rules:

Rule Condition	Description
Via specific Account	This condition allows you to determine which email account the email was received via as defined in Jim2 > Tools > Setups > Email Accounts.
	The condition is true if the email was received via (To:) the specified account.
Sender contains	This condition will search the Sender information (From:) of the email for the text or Regular Expression supplied.
	The Condition is true if the text is found or Regular Expression is true.
Subject contains	This condition will search the Subject of the email for the text or Regular Expression supplied.
	The Condition is true if the text is found or Regular Expression is true.
Recipients contains	This condition will search the recipients (To:) of the email for the text or Regular Expression supplied. The Condition is true if the text is found or Regular Expression is true.
Message body contains	This condition will search the message body of the email for the text or Regular Expression supplied.
	The Condition is true if the text is found or Regular Expression is true.
Subject or message body contains	This condition will search the subject and message body of the email for the text or Regular Expression supplied.
	The Condition is true if the text is found or Regular Expression is true.
User belongs to Cardfile Group	This Condition will search the tagged CardFile to see if the CardFile is a user CardFile and is in the supplied CardFile group.
	The Condition is true if it is a User and is in the specified group.
Customer belongs to Cardfile Group	This Condition will search the tagged CardFile to see if the CardFile is in the specified CardFile group.
	The Condition is true if the CardFile is in the CardFile group.
Existing Jim2 object found	This condition will check to see if the email has been tagged with an existing Jim2 Object (other than a Project). This usually occurs when an incoming email has the Jim2 Email token in the subject.
	The Condition is true if a valid 'Object Token' is found in the email header.
	Note: By default if an email subject contains an 'Object Token' it will be automatically tagged to that object.
Is Reply or Forward	This condition will check to see if the email has been forwarded or replied.
	The condition is true if the email is a Reply or Forward.
Existing Project Found	Check to see if the email has been tagged with a Project.
	The condition is true when there is a tag to a Project or Machine.

Additionally the following applies to email rule processing:

No Condition Defined

You can choose to run the rule on all emails by not choosing a Condition. To do this, click 'Next' and you will need to confirm that you are creating a rule that will apply to all emails before you can continue to the Actions.

Returning a Result

You will notice that most conditions are based on returned values, such as true or false. Most are based on the value of some part of the email, or part of the text that is within the email's subject or body.

For example:

Email Condition	Email section	Condition Value	Actual Value	Result
Via specific Account	To:	support@company.com	support@company.com	True
Via specific Account	To:	support@company.com	sales@company.com	False
Existing Jim2 object found	Subject:	Object Token?	Token found	True
Existing Jim2 object found	Subject:	Object Token?	Token not found	False
Message body contains	Body	Service Request	This is an email regarding a Service Request	True
Message body contains	Body	Service Request	This is an email with some Random Text	False

NOT Conditions

Rules can also be 'negative', that is the condition applies if it is NOT met. You can choose any condition to be NOT. That is, the condition becomes true if the conditions are not met.

Most rules can be based on 'Text' or 'Regular Expression'.

Text

Text simply means contains the following text and can optionally be case sensitive.

Regular Expressions – True/False result

Regular Expression, or RegEx for short, means apply the entered regular expression to the text (email subject for example). Regular Expressions allow extremely powerful text processing to be applied and return true if the expression is met. They also allow for multiple conditions to apply, as is, this OR this OR this.

Regular Expressions – Value result

Regular expressions also allow for a value to be extracted from within some text. For example, a customer CardFile code to be extracted from an email subject or body, and then used to match the email to that specific customer, even if that email was not actually sent directly from that customer. For example, the email was sent to support@ via an automated monitoring application.

Example email sent from automated monitoring application:

From:	ticket@remotemonitoring.com
To:	support@mycompany.com
Subject:	Problem with server details servername.customercode
Body:	Help required: Unable to Access the server

A regular expression can be used to extract 'customercode' from the above email's subject and use this to match the email with a Jim2 CardFile.

Following are short descriptions of the Actions available when Creating Email Rules:

Rule Action	Description
Add Group	This will tag the email to an Email group, as defined in Tools > Setups > Email Groups. If you want to tag this email to multiple groups, you can add the action multiple times to the rule.
Create Job	This action will create a new Job. For this action to be successful the email must already be tagged to a CardFile. In creating the Job, you can define: • The Jim2 user for the Job (eg. who the job is assigned to) • The Job Item (eg. Sales, Service) • The Job Priority (eg. Normal, Urgent) • The Job Type (eg. Normal, Contract, Warranty) If the CardFile tagged to the Email is a SHIP only cardfile, the PARENT CardFile will be used for the CUST# and the email CardFile used for the FROM# and SHIP#. If the action is successful, the email will be tagged to the newly created Job.
Auto Assign Email Groups	This action will search previous emails sent from the same Jim2 Object and link previously linked email groups to it. For this action to work, the email must be tagged to an existing Jim2 Object.
Determine Customer CardFile from Email	The Email will be linked to a CardFile based on the sender's email address. For this action to work the email address must be in the contacts on the CardFile.
Determine Customer CardFile from Contents	Using a regular expression, the email will be searched to try and find a Jim2 customer CardFile code. You can define if you are searching in the email subject, email body or both. If the search is successful, the email will be tagged to that CardFile. You are able to use the variable **<CustCode>**, when looking for the Jim2 customer CardFile code, in your Regular Expression.
Determine Customer CardFile from Website	The Email will be tagged to a CardFile based on the domain portion of the sender's email address. For this action to work the sender's website must be on the CardFile, using the contact type: Web.
Delete Email	If the conditions are met, the email will be deleted, that is, added to the Deleted Email folder. If you choose the Purge Email option, the email will be purged and will not be found in any email list. **Note:** If you use the Purge Email option, the email will be permanently deleted. There will not be any record that the email was ever received by Jim2 ®.
Determine Project from Contents	Using a regular expression, the email will be searched to try and find either a Project serial number or the Project Code. You can define if you are searching in the email subject, email body or both. You are able to use the variables **<SerialNo>**, when looking for Serial Number and **<ProjectCode>**, when looking for Project Code, in your regular expression.
Determine Project from Email	The Email will be tagged to a project based on the sender's email address. For this action to work the Email address must be in the contacts on the CardFile, and the Cardfile must only contain one project.
Determine Project from Website	The Email will be tagged to a project based on the domain portion of the sender's email address. For this action to work the sender's website must be on the CardFile, using the contact type: Web, and there can be only one project based on that CardFile.
Create a Project Related Job	If the email has been previously tagged with a Project, you can create a Project related Job. The setups to these Jobs are defined by the Project or Machine. The following Project Job Types are available: • Billing Meter Job • Service Meter Job • Onsite Job • Workshop Job • Consumable Job The created job will be exactly the same as if you have created directly from the Project, including adding any stock. If the action is successful, the email will be tagged to the newly created job.

Rule Action	Description
Determine Job from contents	Using a regular expression, the email will be searched to try and find either a Job Customer Reference or a Job Number. You can define if you are searching in the email subject, email body or both. If the action is successful, the email will be tagged to the existing job. You are able to use the variables **<CustRef>**, when looking for a Job Reference and **<JobNo>**, when looking for Job Number, in your Regular Expression.

Additionally, the following applies to email rule action processing:

Auto Run

The above actions are set by default to run. You can also choose specific actions to not run automatically. When this is set and the conditions are met, the email summary will show that an Action is available. You will need to click on 'Run' to run the action.

Here is an example where a Create Job action is ready to run.
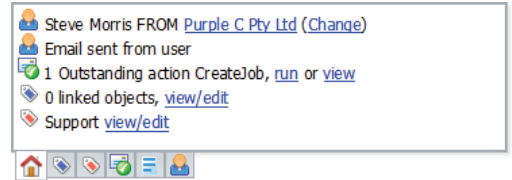
Email Rules - Using and Testing Regular Expressions

When creating a rule that uses a Regular Expression (RegEx) you are able to review and test the expression. To do this, click the ellipses when entering a RegEx (See below).

This will bring up the test tool. To use, type in your RegEx at the top, paste or type in the text of the email you wish to check.

If the expression works you will see the result displayed in the results section at the bottom. When you are satisfied with the results, clicking OK will insert the RegEx into the rule for you.

RegEx Hints are available by clicking the dropdown on the RegEx input.
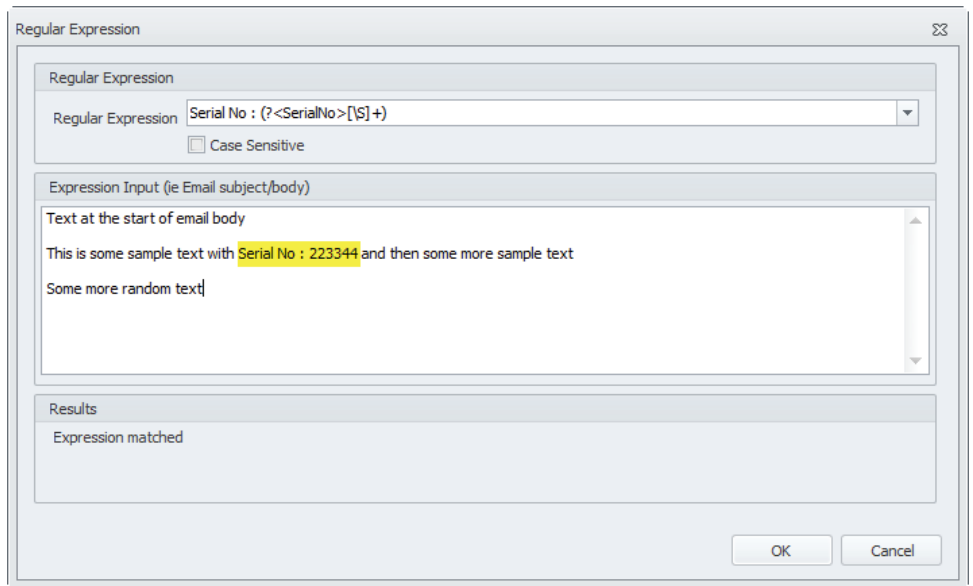
For further information on Regular Expressions please refer to one of the many articles and books available on the topic, or:

http://www.regexlib.com/CheatSheet.aspx

http://www.regular-expressions.info

Email Templates and Editor Rules

Email Templates are used by the email editor when creating a new email. A new email can be automatically created based on a template, depending on the 'type' of email being created.

For example, if replying to an email from a service Job, or when emailing a particular report, use the following template. You can configure which template is configured via **Email > Editor Rules**.

Email Templates

You can create as many Email Templates as you choose. Templates can be automatically applied when creating a new email depending on the type of email being created, or can be applied or inserted when composing a new email from within the email editor.
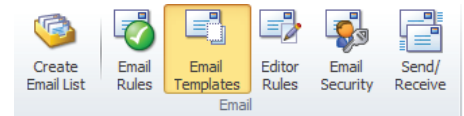
Templates are basically a 'predefined' email, allowing for consistent and 'canned' response email replies. One of the most powerful features of Templates is that they allow the use of macros within the template text. This allows a type of 'mail merge', with macros being replaced with text relevant as to who is logged in, your company details, or specific to the Jim2 object the email is related to (eg. Job, Quote etc).

The use of Email Templates with macros is particularly useful when doing automated emails, for example:

- Emailing Statements
- Emailing Page Requests
- Emailing Login details and password

Macros are divided into two types, General and Context, and can be used in both the email body and subject.

- General Macros include your company name, your name, etc.
- Context Macros are related to a Jim2 Object, for example the customer's name on the Job the email is related to.

The 'syntax' of macros is as follows:

> **{{System.Company}}**
> **{{System.User}}**
> **{{Job.Customer.Name}}**

Macros can also be in a prefix and/or suffix.
For example: **{{'Attention Job.Customer.Name'}}** will be replaced with '**Attention John Smith**'

There is a special macro called **{{Body}}**. This is used when Jim2 is passing text to the email.

For example: When emailing a comment the **{{Body}}** macro will be replaced with the comment text.
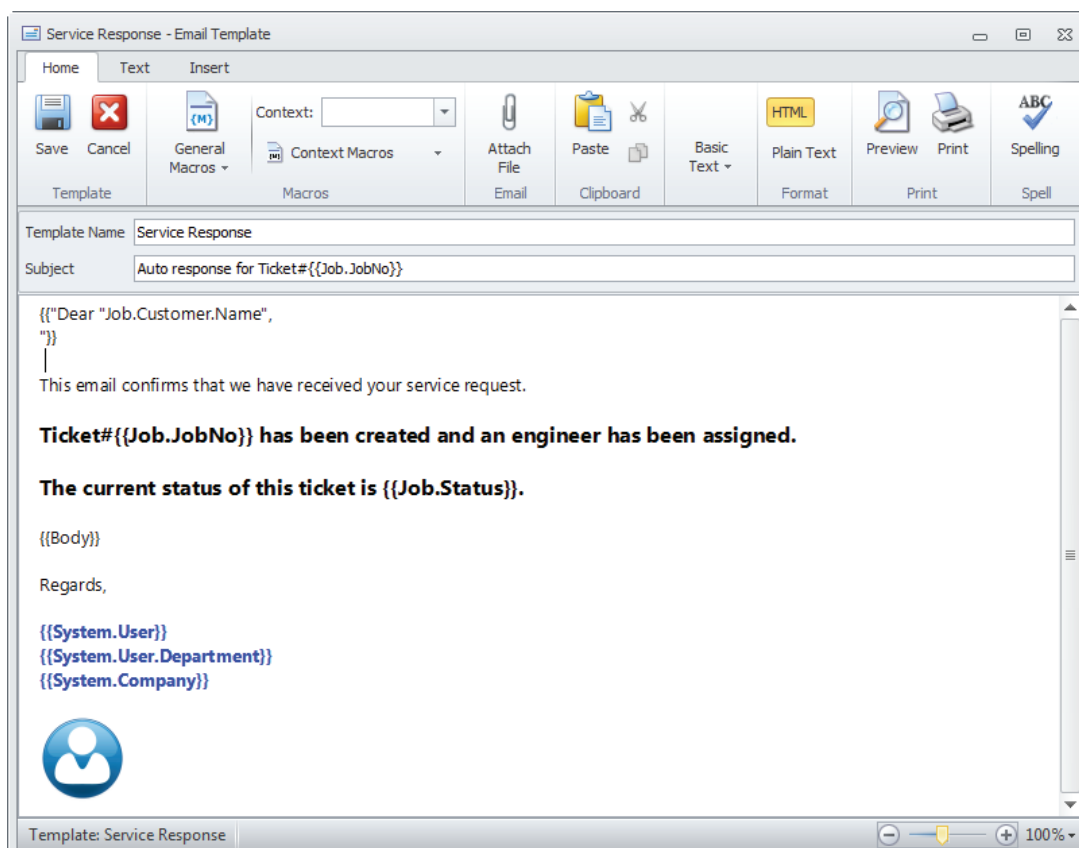
Email Editor Rules

Email Editor Rules allow you to define a number of defaults to use when creating an email based on the 'type' of email. These rules work for all users of Jim2 ®, there are not specific rules for specific users.
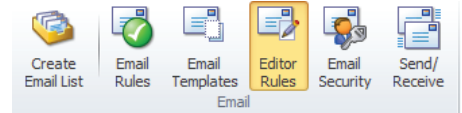
A great example of when to use an Email Editor Rule is when emailing the Debtors Statement report.

The requirement in this case is:

"When emailing the Statement report, use the Statement email template, tag the email as 'Accounts', and send using the accounts@company.com email address."

This can easily be accomplished using the 'Template by Report' email editor rule type.

The Email Editor Rule 'types' include:

Editor Rule Type	Description of when to use
Default Template	Default Template for all emails
Templates by Source	Replying from a Service Job, Sales Job, Quote etc
Template by Report	Sending a specific report via email , a Statement or Invoice for example

Example Email Editor Rules:

Editor Rule Type	Option	Examples
Default Template	Template	Company Default
Templates by Source	Source	Email New Email Reply Email Forward Email Password Email Page Count Sales Job Service Job Manufacturing Job Purchase Return From Customer Return To Vendor
	Template	Service Response
	Reply Email	support@company.com
	Email Tags	Service
Template by Report	Report	Debtors\Debtors List\Statement
	Template	Statements
	Reply Email	accounts@company.com
	Email Tags	Accounts, Statements

Note: You are not required to have a Template, Email address and Tags on every Source and Report.

For example, you might just want the default email address set for every time you respond to a Service Job. In that case you would just choose source 'Service Job' and reply email 'support@company.com'.

When specifying a reply email address to use, there is no limit as to what this email address can be.

Email Security

Email Security is of critical importance, as you may not wish all users to view all email folders. For example, you may not wish users who can access the 'Service' email folder to view the 'Accounts' email folder. As such, carefully consider who in the company is allowed to manage email (add rules, edit email security, etc), and who is allowed to see which Email Folders.

Create Email Rules, Templates, and General Email Security

The creating of email rules, templates, and general email security is generally by managers and owners, and 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 > Email

- Email Security
- Send Email
- Mark Email as Read
- Delete Email
- Purge Email
- Tag Email to Group
- Edit Email Rules
- Edit Email Templates
- Edit Email Editor Rules
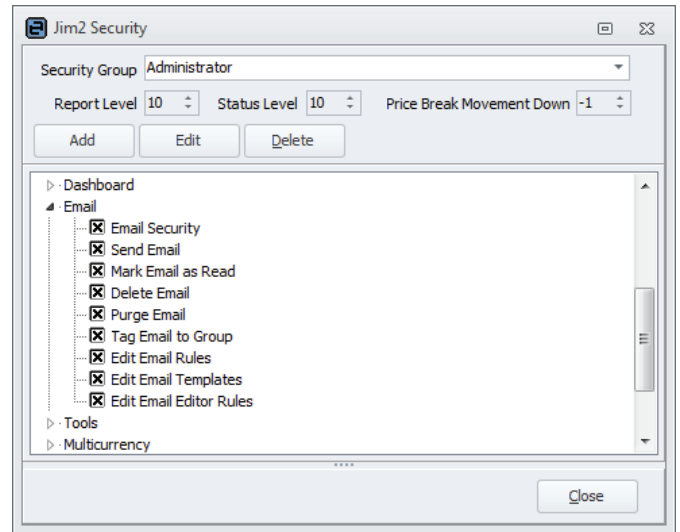
Email Security and Reports

When emailing a report from Jim2 ®, the report's security level is saved within the email. So, for example, if you were to email a 'Job Profit' report and its report security level is 10, that email will not appear to users who have a report security level of 5.

Email Security

Email Security allows you to control which users or security groups can access which Email Folders. When you create an Email Folder, it is not accessible from an Email List until security rights for that folder have been setup. Then, via Email Security, by selecting this Email Folder, you can select which users or security groups have access.
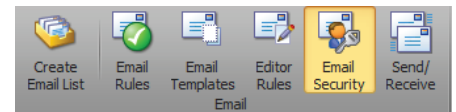
Security to view folders is controlled by locating the Email tab and selecting Email Security. You can either add people or security groups to a folder, or a folder to a security group. By default, no one has access to any of the email folders.

As management, you are creating various Email Folders based on specific areas of your business, and then via Email Security, controlling who is allowed to view these Email Folders.

You can set Email Security using the following two methods:

Email Folder by User:
This Email Folder can be viewed by the selected users, or users in the selected security groups.

To enable selected users or security groups to view specific Email Folders, click on **Email > Email Security**. The Email Security screen will open. Select view by '**Email Folder**' and select the Email Folder you wish to allow other people to view. Click **Edit** and use the arrow buttons to move users or security groups across to the '**Selected Users/Security Groups**' panel. When finished, click **Save**.
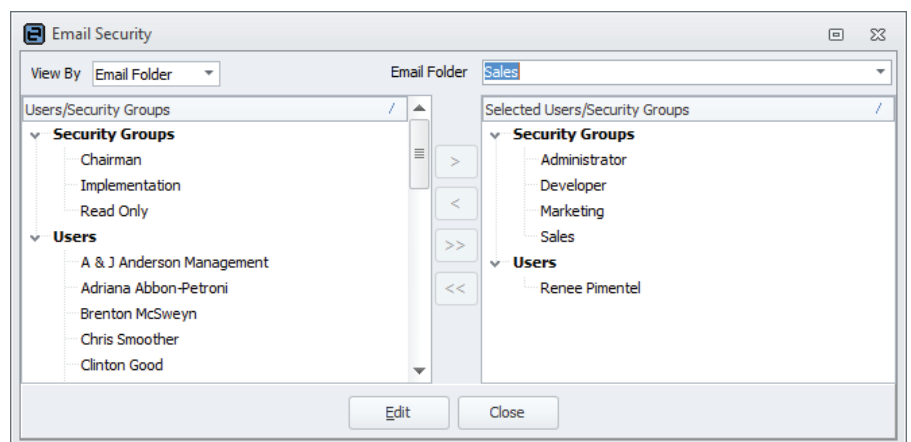
User/Security Group by Email Folder:
This User/Security Group can view the selected Email Folders.

To enable which users/security group can view specific Email Folders click on **Email > Email Security**. The Email Security screen will then open. Select view by '**User/Security Group**' and select the user or security group you wish to work with. Click **Edit** and use the arrow buttons to move Email Folders across to the Selected Email Folders panel. When finished, click **Save**.

Emails within Jim2 ®

Emails within Jim2 are generally handled within the 'comments' grid of the related object. When an email is tagged to an object (either automatically via a rule, or manually), a summary of the email will appear within the comments grid. The complete email will be displayed in the email preview pane or can be double-clicked and displayed within the email window.

The ribbon has been redesigned. The Banking tab has been merged into the Accounts tab, and a new Email tab has been created. A new '**Email Actions**' ribbon group is now visible on all ribbon tabs, much like the 'Reports' ribbon group.

As all emails are now completely contained within the Jim2 database, emailed reports now appear in the 'System OutBox' and are displayed within the related object. For example, if you email an invoice, that email and report pdf are displayed within the related Job.

Additionally, all Lists (Jobs, Quotes, etc) can be filtered to display, for example, only Jobs that have Unread emails attached. Objects that have Unread emails attached are displayed in bold.

Emails within Lists in Jim2 ®

Most lists in Jim2 allow users to filter the list, to see Objects containing unread emails. When you run a list, for example a Job list, and the Job in the list has an unread email associated with it, it will appear as Bold in the list. You can also filter this list by using the 'Unread' checkbox in the list criteria (list header).

As emails can be attached to finished Jim2 Objects, it is useful to run a live list to capture these, otherwise they might slip past your normal monitoring of Jim2 objects.

For example, you could create a live job list with Unread and Invoiced ticked. This will show unread emails that come into Invoiced Jobs.

Email Lists

Email lists are just like any other list in Jim2 ®, with the exception that they must be based on an Email Folder, that is, an Email Folder must be specified as part of the Email List criteria. In this sense, Email Folders are a predefined list criteria.

Unlike other email clients, email lists can display both incoming and outgoing emails, regardless of which email address the email was sent to, or replied/forwarded from.

Whilst not strictly necessary, Email Group Tags should be used to determine which email appears in which email list. For example, all emails tagged with the 'Support' email group will be displayed in the email lists using the 'Support' email folder.

Other list criteria include date ranges, Read/Unread, and email process status (error, attention, etc). As with all lists within Jim2 ®, they can be named, pinned and automatically refreshed (live list).

From an Email List, certain operations like Read/Unread, Delete, Move, and Retag, can be performed on multiple emails. Multiple emails can be selected in the normal 'Windows' fashion, by using the shift or control keys whilst selecting.

If an email is tagged to Jim2 objects, like a Job or Quote, you can simply right click and view the related object directly from the email list.

Note: The Navigation Tree will show the number of unread emails in the Email List.

Moving and Tagging Emails in an Email List

From an email list, you are able to select and Move or Tag, one or multiple emails at the same time.

Use **'Select All' (Control-A)** in Email lists to select all Emails and **Control + Left Mouse Button** to select multiple individual emails.
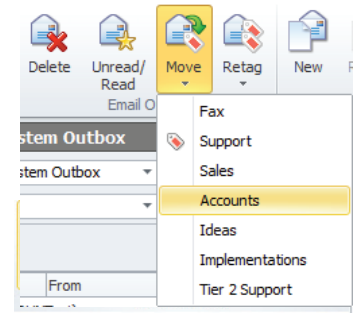
Creating a Job or a Quote from an Email in an Email List

From an email list, you are able to **right click** on an email and choose '**Create**' > '**Job or Quote**'. By doing this, you will be presented with a Job or Quote in Add mode and the Email will drop into the comments. When you save the Job or Quote, the Jim2 Object will be updated on the email to show it is attached to the newly added Job or Quote.

If you cancel adding the Job or Quote, everything will go back to how it was prior to adding the Job or Quote, and the Email will not be tagged with the cancelled Job or Quote.

Composing and Sending Emails

Composing and sending an email in Jim2 will be a familiar experience for anyone who has written an email before.

The following keyboard shortcuts are available:

Shortcut	Description
Control + Enter	Send Email
Control + Delete	Delete 'remembered' email address when in the To:
Control + Alt + Mousewheel	Change the Size of the view in the body

When typing an email address into the To:, CC: or BCC:, Jim2 will suggest Email addresses for you. Email Addresses in Bold are taken from the CardFiles in Jim2 ®. Email addresses not in bold are addresses you have used in the past that are not related to a Jim2 CardFile.

The dropdown on the 'From:' will show what email accounts this email can be sent from. By default, the Jim2 user's email address will be selected (as setup on the user CardFile), unless there is an Email Editor Rule in place. You can also pick from addresses as setup in **Tools > Setups > Email Accounts**. The address used in the 'From:' signals to Jes how to send the email, either out via the SMTP server as defined in setups, otherwise it will fall back to the defaults in Email Options.
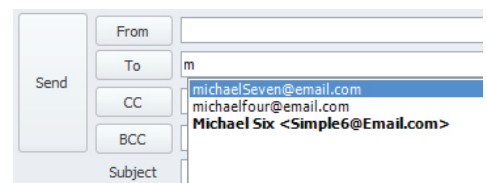
Related Emails

When adding, editing or viewing an object (Job, Quote, etc.), you are able to write and send related emails. The email is then automatically related to the current object.

When sending a Related Email, whilst adding an object, the email will stay in the **System Outbox** until the object is saved. At that time, Jim2 will send it out as per normal. If you cancel adding the object after you have written the email, the email will be purged, and you will not be able to retrieve the email.

Related functionality extends to most objects within Jim2 including Jobs, Quote, Purchases, Return to Vendor and Return from Customer.

Deleting and Purging Emails

You are able to delete an email located anywhere in Jim2 ®, for example, in Email lists, or on Jobs, Quotes etc. When you do delete an email, it will end up in the **System Deleted** Email folder. From the System Deleted Email Folder you have the option of Purging the Email (deleting it forever) or you can undelete it, returning it to the email list, or the tagged Jim2 object.
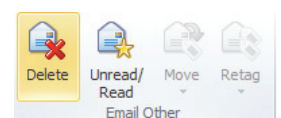
Use **'Select All' (Control-A)** in Email lists to select all Emails and **Control + Left Mouse Button** to select and then delete multiple individual emails.

Note: Purged Emails CANNOT be recovered.

Replying and Forwarding Emails

Wherever emails are located in Jim2 ®, users can reply or forward emails. You can do this by either using the Email Actions in the ribbon, right clicking on the email and choosing an action, or viewing the email and choosing from the Email preview ribbon.

When you reply to an unread email, the original email is automatically marked as read. If you forward an unread email, the original email remains marked as unread.

CardFiles, Invoices, Statements and Emails

Previously in CardFiles, you were able to stipulate if you wanted Statements to be emailed to your Customers. This functionality has been extended to Invoices as well. This means, you can set on the CardFile if you wish to '**Print**', '**Email**', '**Fax**' or '**Don't Send**' automatically when you invoice the customer.

You are not able to change '**Statement Via**' or '**Invoice Via**' to Email without an email address in the contacts of the CardFile (you will receive a warning and will not be able to save the CardFile if you attempt to do this).

The defaults for new CardFiles are set in **Tools > Options > Cardfile**.

When you email an invoice from anywhere in Jim2 (at time of Invoicing, Batch invoicing, from an Invoiced Job, or from the Sales Register), a copy of the email is attached to the comments of the related Job(s).

User CardFiles and Auto Send BCC

Previously in Jim2 ®, when you sent an email Jim2 could automatically BCC a copy to yourself, by setting the '**Auto Send BCC**' in your user settings on your CardFile. This setting is still active and works, but you will probably find that as all the emails and send information are stored in Jim2 ®, you will no longer need a copy sent to your personal email account.

We suggest that you review this setting in light of the new email features in Jim2 ®.

Emails in the Comments Grid

When an email has been tagged to a Jim2 object, you will find the email in the comments grid for that object. Emails will display with a grey background to show that they are an email. Double clicking on the email will display it in the Email Preview window. The date and time on the comments grid is the date and time of the email, and this is not changeable. If the email was an outbound email, the user initials of the person who sent the email will appear in the grid. A Paperclip icon in the grid indicates an email attachment.

Note: You are not able to change the status of the Object from the Comments Grid on an email Item.

Multiple Emails Open – Switch Windows

As you can have many emails open at the same time, Jim2 has an easy way of finding them. By using the **Switch Windows** icon in the **Quick Access Menu,** you can see which emails you have open, and also quickly bring up the Schedule Reminder Window.

Note: You need to close any emails you have in edit before you can close or logout of Jim2 ®. If you don't have them closed you will be given a warning message.
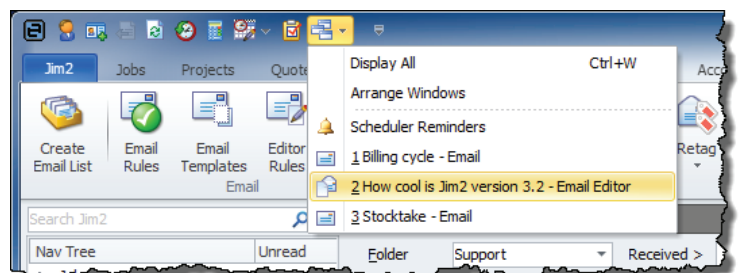
Failed Emails

Sometimes email will fail to send for various reasons. Jim2 has a couple of ways of alerting users when it is unable to send an email.

Failed Emails within a Jim2 Object:

When looking at the comments grid of a Jim2 object (Job, Quote ,etc.) and you see 'Red', you know there has been an issue sending the email. If you move your mouse over the red the Hint will tell you the error as reported by your email server,

Email Properties

You can also view the email, click on Properties and see extended information. Once again, the error as reported by your Email server is displayed (highlighted in the example). This is supplemented with the time and date Jim2 last attempted to send it.

From here you can also check the SMTP headers of the email, which can be very helpful when diagnosing complex email issues.

In this example you may also notice that Jim2 has tried 3 times to send the email. This is useful for times when your email server is not accessible, or is too busy to receive emails.
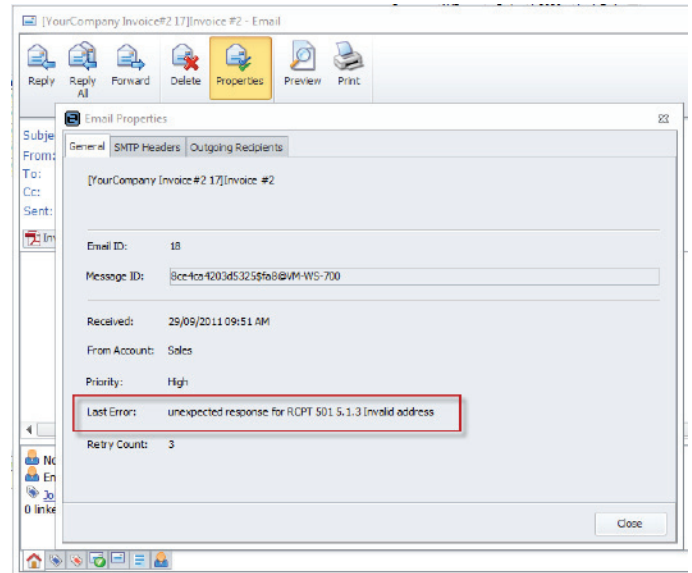
Failed Emails within an Email List:

You can create an Email Folder to show emails with errors. To do this go to **Tools > Setups Email > Email Folders** and create an Email Folder where the '**Processed Status**' is '**Error**'.

You will then need to set up Email Security in regards to who can view the email folder.

Now you can create a new Email list using the folder name. You can pin and put a timer on this list to update regularly, and also auto-run when you log into Jim2 ®.

Example Email Lists

Finding the Emails Sent by a Jim2 User

- Create a new Email List
- Change the Folder to System Sent
- Add the user's CardFile to Card#
- Run the List

Finding the Emails Received from a Customer last Month

- Create a new Email List
- Change the Folder to: Inbox
- Add the Customer's CardFile to: Card#
- Use the Date Picker Dropdown and choose Last Month. This will update the 'Received >' and 'Received <' dates to reflect last month
- Run the list

In this example, it will use all the email addresses on the CardFile.

So, if the HAPPEN CardFile had the sales@happen.biz and support@happen.biz listed, it will find all the emails from those addresses.

Jim2 eBusiness Suite (Jes)

With these new email features, Jes plays a far more important role. It is now required that an instance of Jes is running for each Jim2 database where you plan to use email.

If Jes is not running, you are still able to write emails. They will wait in the Outbox until Jes is started. You will know if Jes is not running when you log into Jim2 ®. You will receive a message (this is configurable in **Tools > Options > General > Show Warning**) if Jes is not running on Startup. After starting Jes you can click on Send/Receive in the ribbon to force the emails to leave, otherwise they will wait until the next delivery time as set in options, and will attempt to send after that.

SMTP relaying authentication

The flow of emails has changed in Jim2 so that Jes is the central point for all sending and receiving. If you have SMTP relaying authentication setup on your email server, you will need to add in the Jim2 Server to the list. Jim2 clients can be removed from the list if it's not required for other applications.

Using Microsoft Exchange Server and Jim2 ®

Microsoft Exchange is a popular email server used by many Jim2 sites. You need to be aware that there may be licensing requirements to use Jim2 and Exchange. For more information on this please see:

http://www.microsoft.com/licensing/about-licensing/client-access-license.aspx

Our understanding is that if you are using User CALs, you may need to devote one user CAL to Jes to be able to access the Exchange Server. Also, you should only require the one CAL regardless of the number of mailboxes you are accessing. From the document on that web page: A Guide to Accessing Exchange Server Licensing:

> *"CALs and mailboxes. A common misconception is that an Exchange CAL corresponds to a single Exchange mailbox This is not true. Whilst most users only have one mailbox, a user with multiple mailboxes requires only one CAL. In contrast, if multiple users access the same mailbox, each user needs his or her own CAL, unless the user is accessing that mailbox from a single device licensed with a Device CAL."*

If you are unsure we advise you talk to your I.T. provider or consult your doctor for further information.

Restoring Databases and Email

In future, when you restore a Jim2 database, email Sending and Receiving will be turned off automatically. This is so you can restore your live database to a training database without repercussions on your email flow.

To re-enable email functions after restoring a database go to **Tools > Options > Other > Email** and tick the '**Enable Receive Email'** and '**Enable Send Email'** check boxes.

Note: It is important that ONE copy of your database has email enabled at any one time otherwise it is unknown which database will collect emails.

User Interface

The Jim2 user Interface (UI) has been redesigned to both allow for new functionality and the cleaner 'Aero' look and feel. Major changes have also been made to both Schedule and Stock Procurement.

Look and Feel – Windows Aero

Windows Aero is the graphical user interface and the default theme in most editions of Windows Vista, Windows 7 and Windows 2008 Server operating systems. Aero is turned off for Jim2 when run on Windows XP or on a Windows Terminal Server (any version).

You can also manually disable Aero by adding the **"–a"** switch to your Jim2 .exe shortcut. i.e., **Jim2 .exe –a**
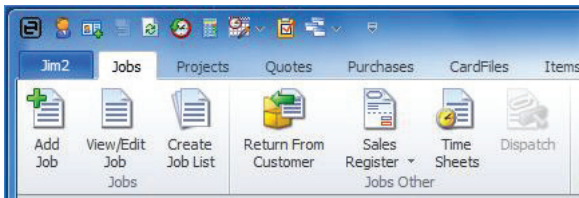
Aero Enabled
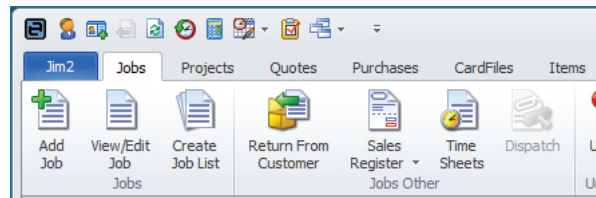
Aero Disabled

Both examples are using the Silver theme.

Ribbon Updates

- Application Menu has changed to the Jim2 Menu (Happen Logo in previous versions)
- Banking ribbon tab has been merged into the Accounts Tab and now appears on the Banking ribbon tab group
- Close Year, Opening Balance Debtors and Creditors has moved to the Tools ribbon tab
- Email ribbon tab has been added
- Switch Windows feature has been added to the Quick Access Menu
- Email Actions ribbon tab group (displayed all ribbon tabs)
- Scheduling View ribbon tab group
- Scheduling Grouping and Filters ribbon tab group
- Scheduling Manage Views ribbon tab group
- Preview Pane Show/Hide button in status bar
- Scheduler Reminders and quick access button in status bar

Preview Pane

A new Preview Pane has been added to the right side of the Jim2 desktop. The preview pane is only visible when an email is available to preview.

The Preview Pane's width is controlled independently between Objects and Email Lists. For example, you may need a wide preview pane when previewing emails from an Email List, and a narrow one when previewing from Objects.

You can also hide the preview pane at any time by clicking the '**Preview Pane**' icon located on the right hand side of the status bar.

Navigation Tree – Quick Expand/Collapse

The navigation tree now includes a useful quick expand/collapse feature. Simply click on the '**Nav Tree**' header and the tree will expand or collapse. This is extremely useful when you have a full tree and need to quickly get to something within the tree.

Popup Messages

Jim2 Popup message has been redesigned in line with the new ribbon and no longer 'steals' focus when you are working in Jim2 ®.

Lists

All object Lists in Jim2 now include the following enhancements:

- Live pinned Lists auto-run on logging in
- Pinned Lists remember relative date settings like 'Today', and automatically update to those settings on login
- List names can now be 25 characters long
- The number of lists per Jim2 Object has increased to 20
- The active record (or line) in lists now displays in blue
- Objects in lists that have related unread emails appear in bold

Schedule

User Interface (UI) Redesign

The Schedule View, Grouping and Filters and Managed Views have now moved up into the Ribbon, giving you more space to view the Schedule, especially on smaller screens. They still work exactly as they did previously, just in a more convenient location.
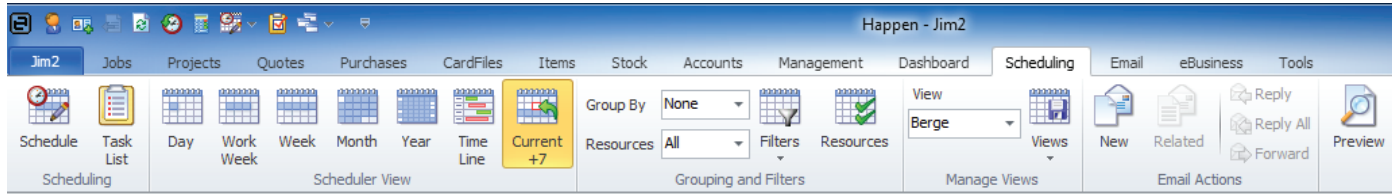
Improved Schedule Performance

Along with the new user interface design, we have also dramatically improved loading speed and responsiveness of the views in Schedule.

Reminders

Jim2 has a new Scheduled Tasks Reminder indicator. It is located in the lower right hand corner of the ribbon status bar and will slowly flash when you have active reminders. This is in addition to the Jim2 standard pop-up reminder window.
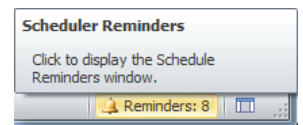
The pop-up reminder window is now non-modal, meaning that you do not need to dismiss it to continue using Jim2 ®. Instead, you can continue using Jim2 with the reminders in the background (accessible from the switch windows menu, or by clicking on the reminder indicator). The new reminders indicator will flash every 30 seconds to 'remind' you that you still have active reminders requiring attention.

You can also bring back the Reminders Window in the Switch Windows Menu (Scheduler Reminders):
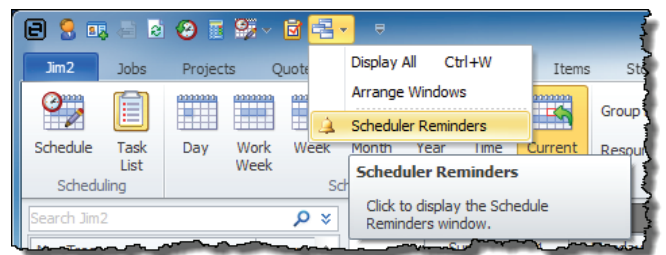
Task List

The Task list now shows the Recurrence End Date in the Task List Grid.

Note: Schedule is a licenced option, and is included in Jim2 MS and MPS Editions. Please contact Happen sales if you wish to licence this option.

Stock Procurement

Stock Procurement has been greatly enhanced in Jim2 version 3.2. The Stock Procurement criteria and calculation options (header) have been enhanced and redesigned so that they are more logically grouped in six 'sections' as followings:

Stock Procurement criteria and calculation options (header):

Section	Criteria/Option	Description	
Procurement	Procurement Type	• Order Only	Generate Purchases Orders Only
		• Order and Transfer	Enable generation of both Purchase Orders and Stock Transfers
		• Transfer Only	Generate Transfers only for Stock that is available in 'Transfer From' locations
		• Transfer All	Generate Transfers for all Stock required regardless of what is available in 'Transfer From' locations
	For Location	Stock location that you wish to generate a Purchase or Transfer for	
	PO Ship Location	When generating a Purchase use this stock location delivery address	
	Show All Stock	Show all stock regardless of whether it needs to be ordered or not	
Transfer From	Locations	• All Locations	Display all locations that stock can be transferred from.
		• Bulk Locations	Display only locations that are flagged as 'Bulk' that Stock can be transferred from (as per Stock Location Setups)
		• Selected Bulk	Display only the selected
	Bulk Location	Bulk location to use if using 'Selected Bulk'	
Calculation Options	Procure in Base Units	For procurement in base units (Unit Measure 1) rather than Buy Measure	
	Transfers (From) in averages	Includes transfers from (transfers placed on you) when calculating stock usage	
	Exclude stock in Packages in sold calc.	Exclude stock used in packages when calculating stock usage	
	Exclude stock required for Packages	Exclude procurement of Stock contained within Packages	
Due Date Days	Purchase within	When calculating what's currently already on purchase exclude forward dated Purchase Orders	
	Job within	When calculating what Stock is required for active Jobs exclude forward dated Jobs	
Vendor	Vendor#	Procure only Stock for the selected Vendor (as per Stock's Vendor tab)	
	Stock Code	Procure only Stock with this Vendor's stock code (as per Stock's Vendor tab)	
	Groups	Procure only Stock in selected CardFile Groups	
	Only if Vendor is Rank 1	Only procure Stock where selected Vendor is Ranked 1 (as per Stock's Vendor tab)	
Stock	Stock Code	Only procure this selected Stock	
	GL Group	Only procure in selected Stock GL Group	
	Attributes	Only procure Stock with selected Attributes	
	Description	Only procure Stock with this Stock Description	
	Groups	Only procure Stock in selected Stock Groups	

How to use Stock Procurement criteria and calculation options

The following is a brief description of various procurement scenarios and what criteria and options to use:

Bulk or Main Stock Location, or Branch that orders Stock directly

When purchasing Stock for a Bulk or Main stock location the following criteria and options are recommended:

Section	Criteria/Option	Description	
Procurement	Procurement Type	Order Only	Generate Purchases Orders Only
Transfer From	Locations	(blank)	
	Bulk Location	(blank)	
Calculation Options	Procure in Base Units	Unticked	
	Transfers (From) in averages	Ticked	
	Exclude stock in Packages in sold calc.	Unticked	
	Exclude stock required for Packages	Unticked	
Due Date Days	Purchase within	0 (typically)	
	Job within	0 (typically)	

Branch or Vehicle that transfers Stock from a Bulk or Main Stock Location

When transferring Stock for Branch or Vehicle that transfers Stock from a Bulk or Main Stock Location the following criteria and options are recommended:

Section	Criteria/Option	Description
Procurement	Procurement Type	Transfer Only or Transfer All — Use Transfer All to force a Transfer on the Bulk location. The Bulk location will then include this Transfer request in its Stock Procurement
Transfer From	Locations	Locations to transfer Stock from
	Bulk Location	(blank) or specific Bulk location
Calculation Options	Procure in Base Units	Ticked to transfer to in Units, rather than, say, Boxes
	Transfers (From) in averages	Unticked
	Exclude stock in Packages in sold calc.	Ticked
	Exclude stock required for Packages	Ticked
Due Date Days	Purchase within	0 (typically)
	Job within	0 (typically)

New Procurement Parameters

Stock Procurement now includes several new parameters. Some existing parameters that were at a 'Stock' level can now also be at a Stock's 'Location Level'.

Min Qty Low/High
The 'Min Qty Low' and 'Min Qty High' procurement parameters provide a 'window' for purchasing and provide a way of batching orders rather than ordering the same Stock every day.

Basically you are saying you wish to keep between 5 to 10 of this Stock in stock. When the stock level drops to 5 or below, then you wish to purchase enough Stock to bring the level up to 10.

Both parameters are optional, in which case they are not used and the procurement order quantity is calculated based purely on how many days' worth of stock you wish to maintain.

Limit Qty
The 'Limit Qty' provides a way of putting an absolute limit on how much Stock you wish to order. This is useful when average usage gets thrown out because of one off bulk sales, catalogue sales and promotions, and seasonal peaks etc.

The Limit Qty parameter is optional, in which there is no limit on how much stock can be ordered.

Reorder Qty
'Reorder Qty' can be now at a Stock or Stock Location level. If a location level reorder qty is specified it will be used, otherwise the Stock's default reorder qty will be used. Either way both parameters are optional.

Days Supply
'Days Supply' allows users to specify how many 'days' worth of this Stock they wish to Purchase or Transfer, based on average usage.

Exclude Attributes in Procurement

You are now able to exclude stock attributes on certain Stock when using Stock Procurement. This is useful when you use stock attributes on 'Buy', like batch numbers or due dates, which are not helpful to Stock Procurement when ordering (eg. you just need to order them, you don't need to know what the batch number or what used by dates will be). Please see Stock section for more details.

Stock Procurement Grid Enhancements

The Stock Procurements stock grid has been greatly improved with columns logically grouped in four 'bands' as follows:

Band	Column	Description
Stock Information	Stock Code	Stock Code
	Stock Description	Stock Description (editable)
	Stock Unit	Stock's Unit measure (either Base or Buy unit depending on option)
Current Requirements	Qty On Hand	Current quantity on hand at this location
	Qty On Jobs/Txfr	Current quantity on Jobs and Transfers placed on this location
	Qty On Purchase	Current quantity on Purchase for this location
Statistics	Days On Hand	Current days worth of stock on hand based on average use (Red when higher than Days Supply)
	Avg Monthly Sales	Average sold per month
Procurement Setup	Days Supply	How many days' supply you wish to keep in stock (location level)
	Min Qty Low	Minimum quantity you wish to keep in stock (lower limit)
	Min Qty High	Minimum quantity you wish to keep in stock (upper limit)
	Limit Qty	Maximum amount of stock ever to keep in stock (Red when exceeded)
	Reorder Qty	Reorder quantity (either at a stock or location level)
Purchase Details	Add to existing Purchase	Rather than generate a new Purchase Order, add to selected existing Purchase Order
	Supplier	Supplier you wish to purchase stock from (Rank 1 by default)
	Price Ex.	Current buy price
	Order/Txfr Qty	Quantity of Stock you wish to transfer
Order	Order	Tick to Purchase or Transfer

Update Procurement Parameters directly from the Stock Procurement Screen

You can now update and refine one or multiple Stock's procurement parameters directly of the Stock Procurement screen. Any changes to parameters made will force the procurement calculations for that stock to be automatically recalculated.

Given all the new Stock usage statistics available, this provides an incredibly powerful way to fine tune your stock levels.

To update the procurement parameters first select one, or many, Stock (Control A, or Control Left Mouse Button), and then **Right Click** and select '**Change Procurement Details**'. A screen will appear allowing to update the parameters as required.

Note: It is not always necessary to use Stock Procurement to generate Purchases and Transfers. Use it to maintain and check Stock usage and purchasing requirements.

Dashboard – Job Widget

The incredibly popular Dashboard feature first introduced in Jim2 version 3.1, now includes a new Job Widget.

The Job Widget is designed to display both active Jobs or view job statistics over a period.

Example usage includes:

- All active Jobs by Region
- All active Sales Jobs by Account Manager
- All Invoice Jobs for X days grouped by Name displayed monthly
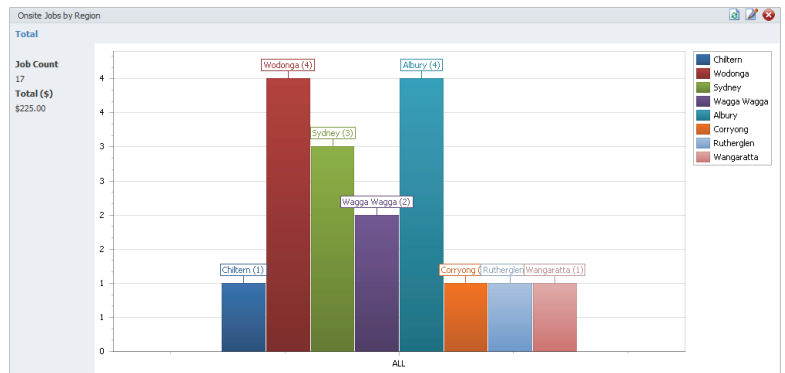
Job Widget Options.

Group	Option	Description
Widget Settings	Caption	This is the caption that will be displayed at the top of the Widget Example: Onsite Jobs by Region
	Refresh	The Widget's refresh interval in minutes Note: It is suggested not to set this too low (eg 15 minutes or higher)
Chart Settings	Chart Type	Only the Bar Chart type is available in this widget
	Show Labels	Show 'Group By' description and value above each bar of the chart Note: the label will be displayed as a hint when your mouse is over a graph point
	Palette	Select the palette (colours) that will be used in the graph
	Point Size	The size of graphs Points Default = 2. Try 8 or 10 on smaller graphs
Period	This Week	Period range for first series (X axis) of data to be displayed
	This Month	
	This Quarter	Last X days allows you to view a number of days back from today. Example 30 to display the last 30 days, 365 for the last years, or 1095 for the last 3 years
	This Year	
	This Fin Year	
	Last X Days	
	Last Week	
	Last Month	
	Last Quarter	
	Last Year	
	Last Fin Year	
Job Options	Name	Filter by specific Name (blank for all)
	Acc Mng	Filter by specific account manager (blank for all)
	Item#	Filter by specific Item# (blank for all)
	Job Type	Filter by specific Job Type (blank for all)
	Cust#	Filter by specific Customer Code (blank for all)
	Status	Filter by specific Status (blank for all)
	State	Filter by one or more Job stats Active, Finish, Ready, Invoice
Other	Period (X Axis)	Daily, Weekly, Monthly, Quarterly, Yearly, None
	Period (Y Axis)	Job Total, Labour Total, Job Count, Job Count/Job Total
	Group By	• (None) • Acc Mng. • Job Type • Branch • SubBranch • GL Dept • Region
Branches	Branch	Filter Jobs by specific Branch
	SubBranch	Filter Jobs by specific SubBranch
	GL Dept	Filter Jobs by specific GL Dept

Dashboard Security

Dashboard security has been updated to be more in-line with the security used in Email Folders. This allows you to select Users, or User Security Groups, when defining access to a Dashboard.

Dispatch

This new feature allows you to create dispatch lists, or shipping manifests, based on invoiced jobs and the method you wish to ship them.

Dispatch is based on a 'session', that is you create a list of orders/jobs that need to be shipped, select which ones you wish to dispatch (based on say carrier), and click save to finalise. A Dispatch Session is then created, and can be printed or exported as required.

Dispatch Setups

Control of what is actually 'dispatchable' is defined at a 'Ship Via' level. For example ship via 'Collect' or 'Email' are not likely candidates, whereas couriers and drivers would be.

In **Tools > Setups > Job > Ship Via** you can define if a **Ship Via** method can be used in Dispatch. You can also define the Carrier Code and Carrier Service as these are required by some courier services. You may need to confirm with your carrier exact values required.

Note: As you may have already used this Ship Via prior to v3.2, it may be necessary to create some 'dummy' Dispatch Sessions to effectively reset everything.

Dispatch and Jobs

The Invoice details tab on Jobs has been updated to handle the new dispatch functionality.

The Ship Attn, Carton Count, Order# (Customer Ref), Ship Via and Ship Ref# will all carry through to the Dispatch Session.

If your Job was created from a Quote, this information can also originate from the Quote. The Invoice Tab on a Quote has also been updated to reflect that of a Job.

Note: Ship Ref# is not copied over if you select 'Create Similar' to create the Job or Quote.

Invoice Details

Invoice details have also been updated. An Invoice's Order# (Customer Ref), Ship Attn, Ship Via and Ship Ref# will carry through to the Dispatch Session.

Using Dispatch

Dispatch can be found in the ribbon under **Jobs > Dispatch**.

Click Dispatch and the Dispatch List screen will appear.

For an Invoice/Job to be in the Dispatch list it needs to be:

- Invoiced
- Not previously dispatched
- Using a Dispatch Ship Via (as defined in Setups)
- Either 'Depleting' or 'Special' stock and/or have Carton Value greater than Zero
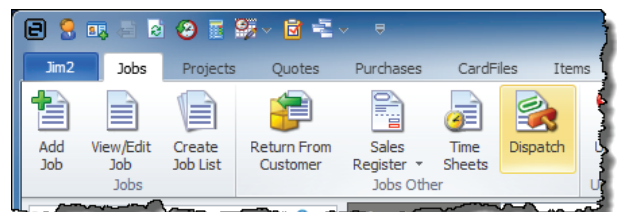
Creating a new Dispatch Session

To create a new Dispatch session tick 'Undispatched' and optionally select a 'Ship Via' and/or 'Region', and click Run.

A list of dispatch Invoices/Jobs ready for dispatch will be displayed.

Tick off the items you wish to dispatch, or use '**Select All**' to select all items.

Click '**Dispatch**' to create a Dispatch session for the selected items.

You have the option of saving an incomplete Dispatch session by clicking '**Save**', and then returning to this later to complete (after lunch perhaps).

Upon clicking '**Dispatch**' a Dispatch Session will be created and '**Select By**' will display the newly created session's number. The Dispatch session is now complete and can be printed or exported as required.

View an existing Dispatch Session

To view and/or reprint an existing Dispatch Session, tick '**Dispatch#**' and select the required session from the dropdown.

Deleting an existing Dispatch Session

To delete an existing Dispatch Session tick '**Dispatch#**' and select the required session from the dropdown, then click the '**Delete Dispatch Session**' button.

Dispatch Session Security

Please ensure security is configured regarding Dispatch.

Return From Customer

Return From Customer has been enhanced and now includes the following:

- Allow returns from multiple Invoices on the one RFC
- Allow returns with no Invoice number
- Strict Return option
- Additional security settings

To cater for these new features, the stock grid now includes both Invoice# and Job# columns.

When adding a return with no invoice number a related Debtors Purchase Order will be created on the status of 'Received'. This allows sales staff to add returns without requiring access to purchases. Purchasing staff can cost the return correctly at a later time.

Note: The 'Add All Stock' feature is only available when an Invoice# is selected in the returns header.

Return From Customer now includes an additional security setting:

Security > Jobs > Return From Customer > Allow non strict Returns

Set this security setting to enforce the use of an Invoice number when adding a return from customer.

Return To Vendor

Return To Vendor has been enhanced and now includes the following:

- Allow returns from multiple Invoices on the one RTV

To cater for this new feature the stock grid now includes a PO# column.

Note: The 'Add All Stock' feature is only available when a PO# is selected in the returns header.

Debtors

BPay filter in Debtors List
If you are using BPay, and have BPay set in options **(Tools > Options > Invoice)**, you will now see the customer's BPay number in the Debtors List.

You can also quickly find the customer by the BPay number, by using the BPay filter in the Debtors List header. You need to enter the entire customer reference number; the filter will not do partial searches.

Bulk Debtors Payments
New Feature: for the importing or bulk entry of debtors' payments. Typically this payment information is from an external payment gateway, finance company etc.

Applying multiple credits in Debtors
You can now select multiple credits to apply to one or more Invoices. The credits are allocated in the following way:

1. By related invoice if not fully paid
2. By amount – same total amount of credit and Invoice
3. FIFO when neither of the above applies

NOTE: When applying multiple credits you cannot select which Invoices to apply the credits to. You have to apply them manually if you want to make the selection.

Remember Last Payment Details
Debtors now 'remembers' the details of the last payment you have entered, making it much easier when adding multiple payments with the same details: Payment Method, Bank Account, Payment Date etc. The 'remember' details are highlighted in red if different from the default.

Payment Transaction Details
You can now right click on a Payment to view its transaction details.

Creditors

Applying multiple credits in Creditors
You can now select multiple credits to apply to one or more Purchases. The credits are allocated in the following way:

1. By related Purchase if not fully paid
2. By amount – same total amount of credit and Purchase
3. FIFO when neither of the above applies

NOTE: When applying multiple credits you cannot select which Purchases to apply the credits to. You have to apply them manually if you want to make the selection.

Sales Register
The Sales Register has been updated to include Debtors Purchase Orders

Invoicing
Invoicing now includes the following enhancements:

• Allow invoicing when customer is on auto credit hold security setting
• Force entering of amount when payment by Cash

GST Sessions
GST Sessions include the following enhancements:

• Updated to handle new NZ GST changes
• Deferred GST can be edited and now reports to 7A in GST Calculation Worksheet Report

Labour Entry
Redesigned, larger and now resizable

CardFile – Quick Add CardFile
Name increased to 100 characters in length (was 50)

Comments Grid

You are now able to add comments to Jim2 Objects that are Finished. To do this, view the object (like a Job), right click in the comments Grid and select 'Add New'. A new 'Add Comment' window will appear:
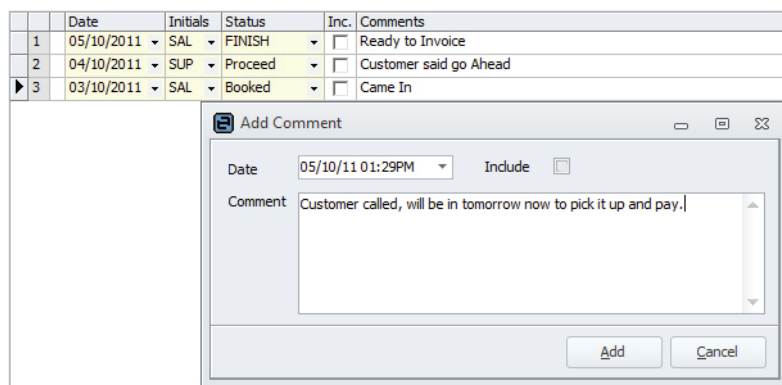
When you are finished adding a comment and setting the date, clicking Add will add it to the Jim2 Object.

Note: You are unable to edit or delete the comment once saved, so best to check your work before you click Add!

Note: If you previously used the 'Add Comments' menu script, it will be removed from your database as part of the update as it will no longer function correctly.

Stock

Stock – Exclude Attributes in Procurement

You are now able to exclude stock attributes on certain stock when using stock procurement. This is useful when you have to use stock attributes on Buy, like batch numbers or due dates, which are not helpful to stock procurement when ordering (eg. you just need to order them, you don't need to know what the batch number or what used by dates it will be). To enable, click the 'Exclude attributes in procurement' checkbox as indicated on the Stock's Attribute tab below:
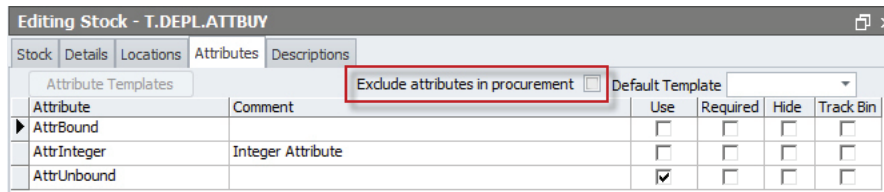
Stock Attributes

The limits have been removed for Bound Attributes (previous limit was 7000 characters).

Serial Numbers

Serial numbers can now be automatically capitalised. To enable this feature go to **Tools > Options > Stock > Serial/Attributes** and check **'Capitalise serial'**.

Vendor Stock Codes

The Vendor Stock Code on the Vendor Tab of Stock has been increased to 50 characters.

Stock List

Stock List now shows the Price Group in the Stock List Grid.

Stock Transfers

Multi-stock select is now available on Stock Transfers.

Purchasing

Consignment Stock - Consign Buy Auto Add

Jim2 v3.2 introduces a new feature to automatically add consignment stock to a Consign Buy Purchase Order. When adding or editing a 'Consign. Buy' Purchase Order, **right click** on the stock grid and select '**Add Stock off Consign. In**'. All stock sold on consign for that Vendor will be automatically added to the Purchase Order.

Purchase Orders Multi-stock Select

Multi-stock select is now available on Purchase Orders.

Features and Enhancements: Jim2 Managed Print Services Edition (MPS)

The following is only available if you are licenced to use the Projects, Managed Print Services or Managed Services features.

New Billing Periods
You can now setup up your Projects to bill in Weekly and Fortnightly cycles, in addition to the normal Monthly etc.

Display and choose Projects when adding Jobs
You can now automatically force the project selection screen to display upon entering a Job where the Cust# CardFile has a Project or Machine.

Enable via **Tools > Options > Project** and tick '**In Job display Projects during CardFile entry**'

When this is on, whilst adding a job you will be prompted to add the project to the job, based on the CardFile added in the Cust#, From# or Ship#. This is a great way to ensure your project information is added correctly to Jobs.

Project Lists
The following columns have been added to Project Lists:

- Name
- Account Manager
- Customer Name

In addition, Billing is now in the Lists sort order

Improved Project Select/Lookup
The Project Select has been updated to help you find the project you are searching for much more easily.

New Stock Macros
For Prepaid Pages:
- <Next Expire Date>
- <Next Meter Read>

For Master Machines
- <Over Rate>
- <Over Total>
- <Min Volume Pages>
- <Over Pages>
- <Total Pages>

New Email and Description Macros
For Page Requests:
- <Counters_NoLastMeter>

For Billing Jobs:
- <Current Year>
- <Previous Year>
- <Next Year>

Total master type.
A new Master Meter Type has been added which accumulates both black and colour meters to determine the agreement minimum volume.

Master Over Rates
A secondary rate has been added to the masters which pages that exceed the agreed volume are charged at. Child Machines are adjusted proportionally to reflect the new rate.

New Automated Meter Read

Jim2 now supports two new automated meter read methods:

- Print Audit
- Ricoh Direct

Meter Copy Kits
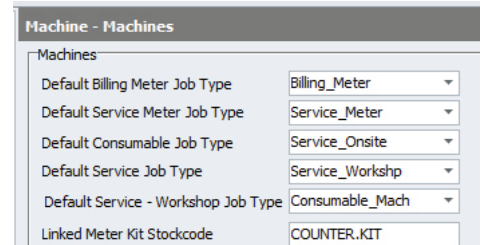
Meter Copy Kits is a new feature that allows income from a meter to be split into two. This would typically be sales and service, as in, a portion of the income is sales, and a portion is service.

This is accomplished by splitting the meter into two separate billing Stock, with each Stock pointing to separate Stock GL Groups, thus separating the income.

The two billing stock are then invoiced within a Kit. The default kit to be used by Meter Copy Kits is configured in Options > Projects > Machines.

Setups and Notes:
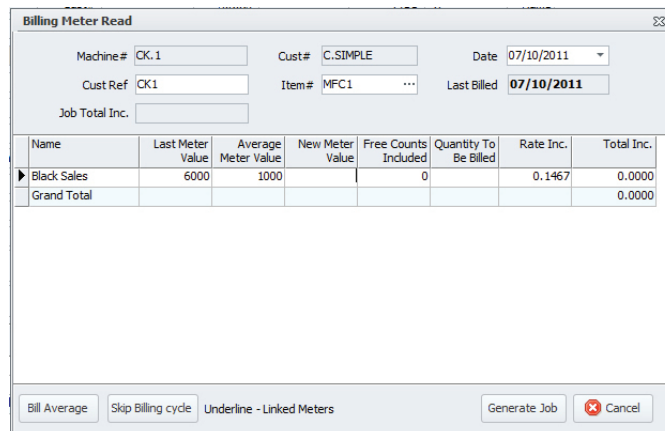
- Add a stock of type 'Dynamic Kitting'
- Set the Kit's 'Sell 4 decimal places' to match the Counter Stock (typically set to sell 4 Decimal places)
- Add the Kit's StockCode in 'Linked Meter Kit StockCode' in **Tools > Options > Project > Machines**.

On a Machine Meter Setup, link 2 Meter Types together (Black line 2 links to Black Line 1). Jim2 will add a Total on Save.

When billing, you will only see the Top Meter Name:

On the Job you will see the kit used:

Note: Linking Minimum Charges doesn't work (a Total Minimum Charge is supported)

Note: Be careful when returning meters. Either return the entire Kit and all stock, or make sure you return the same amount on each counter (otherwise the current Meter Counts will be not match when viewing the meter setup)

Features and Enhancements: Jim2 Managed Services Edition

New Billing Periods
You can now setup up your Projects to bill in Weekly and Fortnightly cycles, in addition to the normal Monthly, etc.

Display and choose Projects when adding Jobs
New option in **Tools > Options > Project** 'In Job display Projects during Cardfile entry'

When this is on, whilst adding a job you will be prompted to add the project to the job, based on the cardfile added in the Cust#, From# or Ship#. This is a great way to ensure your project information is added correctly to the job.

Project Lists
New columns in the Project lists:
- Name
- Account Manager
- Customer Name

Improved Project Select/Lookup
The Project Select has been updated to help you find the project you are searching for much more easily.

Managed Service Tasks Descriptions on Jobs
In **Tools > Options > Managed Services** there is a new option labelled:

'Use Billing Descriptions with Managed Service Task Jobs'

When this is ticked, Jobs created via Managed Service Tasks will use the Fault and Invoice descriptions as set on the Project (or fall back to the defaults set in 'Tools > Options > Managed Services' if none are set). If unticked, the Job created will use the Subject of the Task in the Fault Invoice descriptions.

Prepaid Labour
New Feature: Prepaid Labour

To use this feature you need to:

- In Tools > Setups > Project Types: Setup a new project type using the System Type 'MS Prepaid Labour'
- When you use this Project type on a Project, a new tab called 'Prepaid Setup' will appear to set up the Prepaid Labour defaults

Prepaid Tab Setup Example:

Prepaid ID	Prepaid Name	Prepaid Type	Billing Stock Code	Expire Stock Code	Card Code To Invoice	Current Prepaid Count	Starting Balance	Rate Ex.	Rate Inc.	Last Billed By	Hide On Invoice	Linked Prepaid ID	Prepaid Blocks	Next Expire Date	Expires Frequency
1	Normal Labour	Prepaid Labour	T.LABOUR ...		C.SIMPLE ...	30	30	70.0000	77.0000		☐	▾		▾	▾
2	Labour Blocks	Prepaid Labour Block	JOURNAL.1 ...	JOURNAL.2 ...	C.SIMPLE ...	30	60	70.0000	77.0000		☐	1 ▾	60	▾	▾

	Prepaid Labour	Prepaid Labour Block
Billing Stock Code	Labour Type Stock	Journal Type Stock
Linked	Current balance of a block used	At which balance do you next want to bill a new block
Linked	Not used	Should be linked to the Prepaid Labour line
Prepaid Blocks	Not used	Quantity of a block (ie. the size of a prepaid block)

Prepaid Type	Billing Stock Code	Current Prepaid Count	Linked Prepaid ID	Prepaid Blocks
Prepaid Labour	Labour Type Stock	Current balance of a block used	(empty)	(empty)
Prepaid Labour Block	Journal Type Stock	At which balance do you next want to bill a new block	Link to Prepaid Labour (normally Prepaid ID 1)	Quantity of a block (ie. the size of a prepaid block)

Note: Rates should be the same on both Prepaid Labour and Prepaid Labour Blocks.

Updated Security settings

The following additional security settings have been added:

Security > Job
- Change Invoice Date
- Allow invoicing when Customer is on auto credit hold

Security > Job > Return From Customer
- Allow non strict Returns

Security > Job > Dispatch
- View
- Edit
- Delete
- Allow Dispatch for all Branches

Security > CardFile
- Reassign Users

Security > Stock
- Allow to apply Price Discounts

Security > Email
- Email Security
- Send Email
- Mark Email as Read
- Delete Email
- Purge Email
- Tag Email to Group
- Edit Email Rules
- Edit Email Templates
- Edit Email Editor Rules

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

Updated Options

The following additional **Tools > Options** settings have been added or updated:

All Editions

Options > Other > Email
- Enable Receive Email
- Poll every X minutes
- Enable Send Email
- Default SMTP Server
- SMTP Server Port
- Max Emails per minute
- HTML Font, Style, Size
- Plain Text Font, Style, Size

Managed Print Services Edition only

Options > Projects
- In Job, display Projects during Cardfile entry

Options > Projects > Machines
- Linked Meter Kit StockCode

Managed Services Edition only

Options > Projects
- In Job, display Projects during Cardfile entry

Options > Projects > Managed Services
- Use Billing Descriptions with Managed Service Task Jobs

New and Updated Reports

All system reports have been updated for Jim2 v3.2. In addition the following reports have been enhanced:

- Invoice memo can now any length (auto expands)
- Proforma Invoice layout now same as Sales Invoice layout

Jim2 Update

The Jim2 Update Process has been greatly improved.

Now one update file will update your Jim2 ®, Jim2 Server and Jes instances in one process. To execute an upgrade, download the Upgrade File to your Jim2 server, and double click to run it.

Welcome

The new update program shows the steps required to move through the application. When you are finished with each step, click 'Next' to move to the next step.
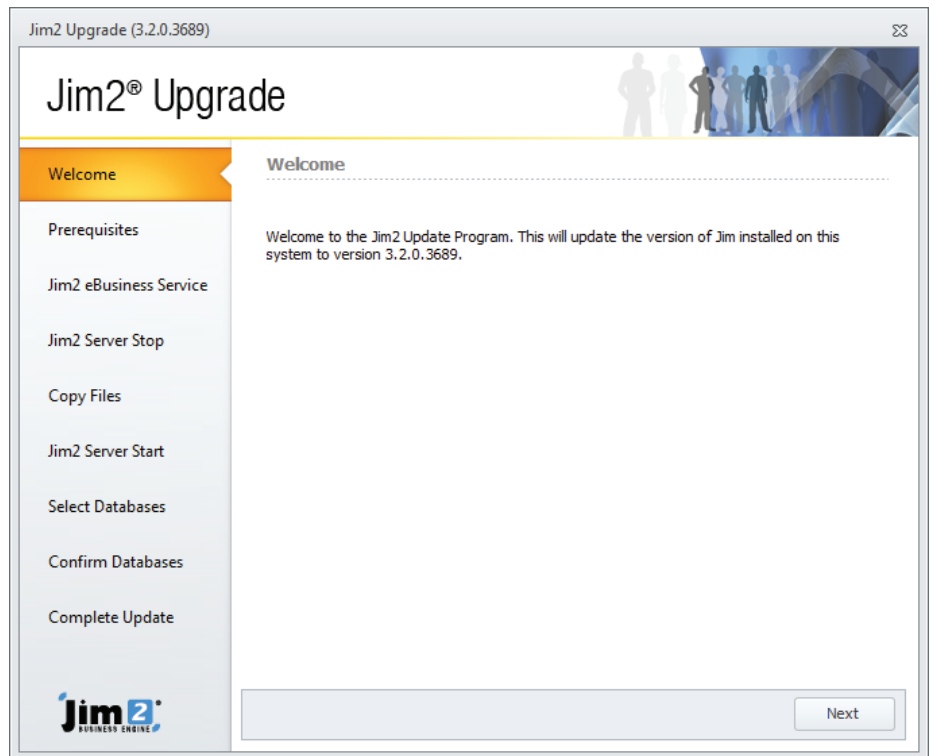
Prerequisties

Jim2 requires .NET 3.5 Framework and Windows Installer 4.5 installed. The updater will check and confirm that they are installed, or will prompt you to install them.

Note: This is only checking the server. The .NET 3.5 Framework is also required on any clients connecting to the Jim2 Server. Jim2 will check the client when starting and alert if necessary.
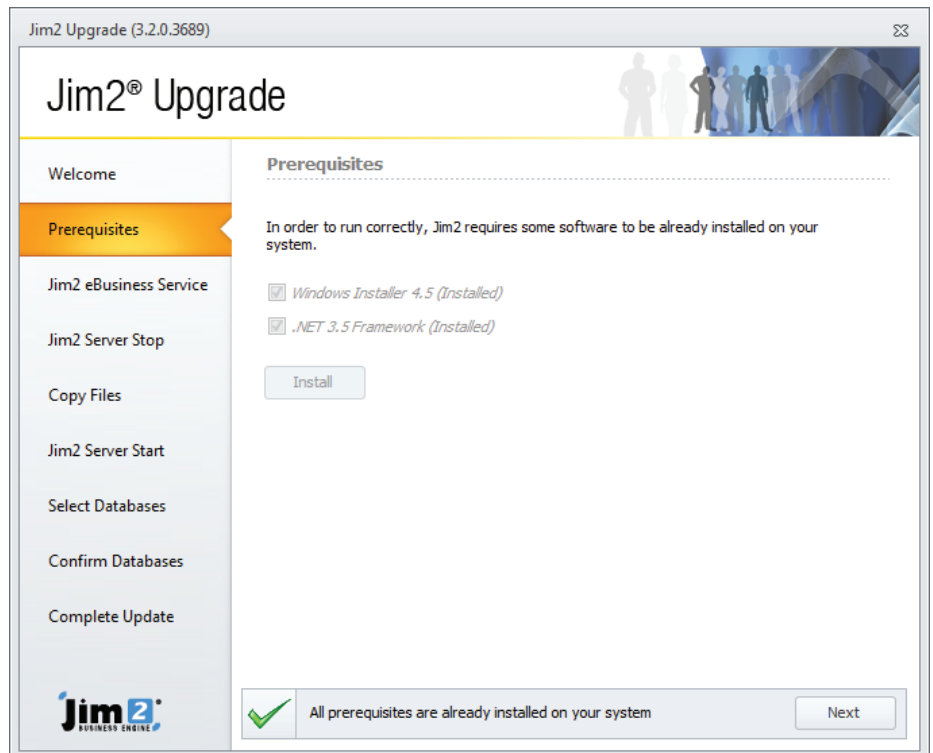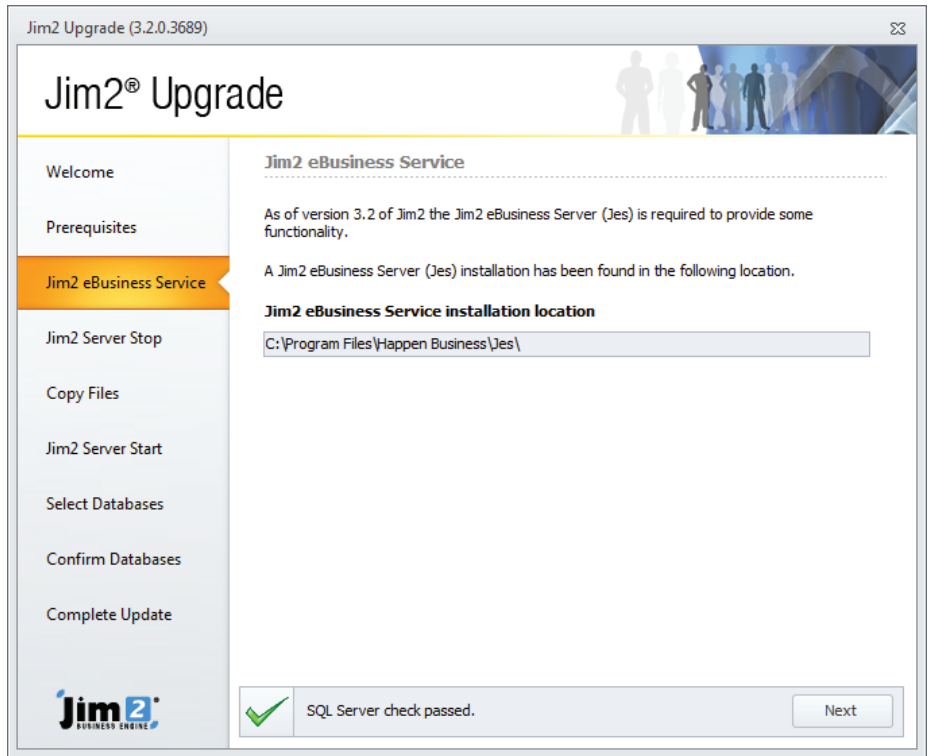
Jim2 eBusiness Service (Jes)

The updater now installs and updates the Jim2 eBusiness Services (Jes) as well as updating Jim2 client and Server (Jes is no longer a separate download and installation). If you have not installed Jes in the past, the updater will install Jes for you.
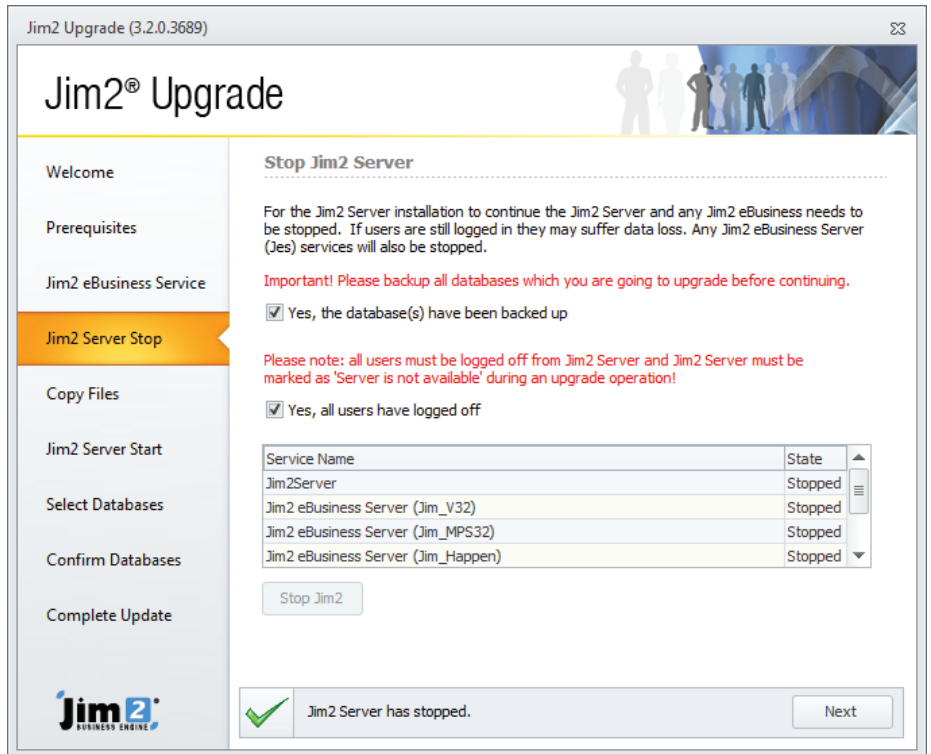
If Jes is found on your system, the updater will show the current installation path.

Jim2 Server Stop

The updater will now stop the Jim2 Server and Jes Services.

You need to Tick that the databases have been backed up and that no users are currently connected to Jim2 before you can click Stop Jim2 ®.

Copy Files

The updater is now ready to copy your new Jim2 files. Click Upgrade to start. You can watch the process.

At the end of the copy process, the updater will check your current Firewall settings and will offer to fix them if it can.

If you are unsure about your Firewall settings, you can click Next to continue and contact your IT provider after the Update is finished to address any possible issues.
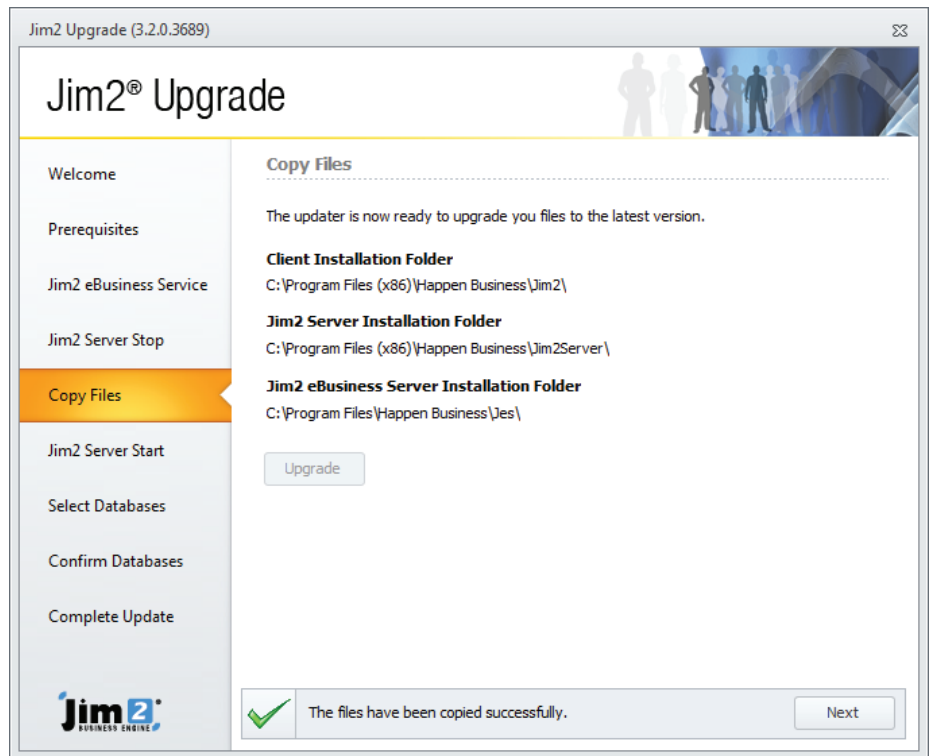

Jim2 Server Start

The updater will now restart the Jim2 Server Service. If, for any reason the service does not restart you will be alerted here. You can click 'Test' to confirm the service has been started.
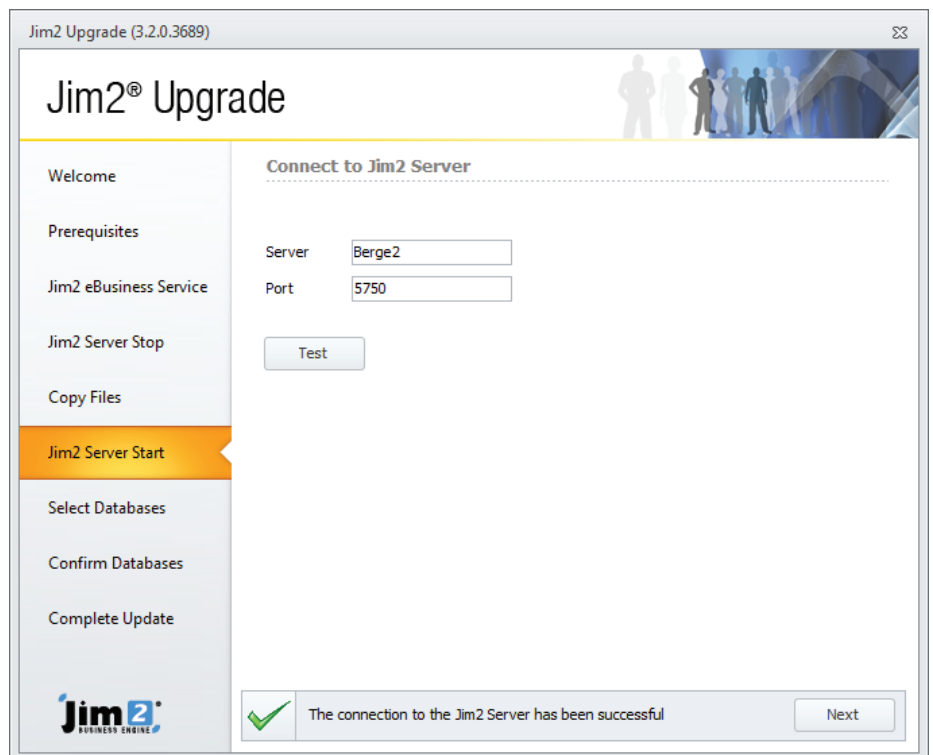
Select Databases

You need to select which databases you wish to update to the latest version.

In most cases you would click Select All to choose all databases and then click Next to continue.
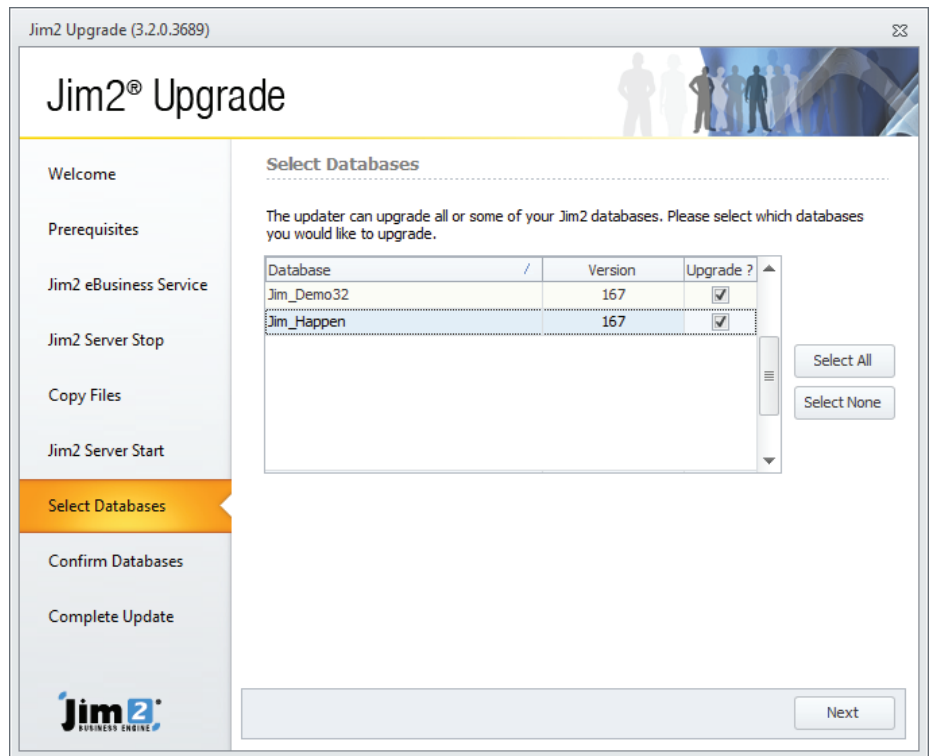
Update Databases

Click Upgrade to update the selected databases. You can watch the progress of the update.
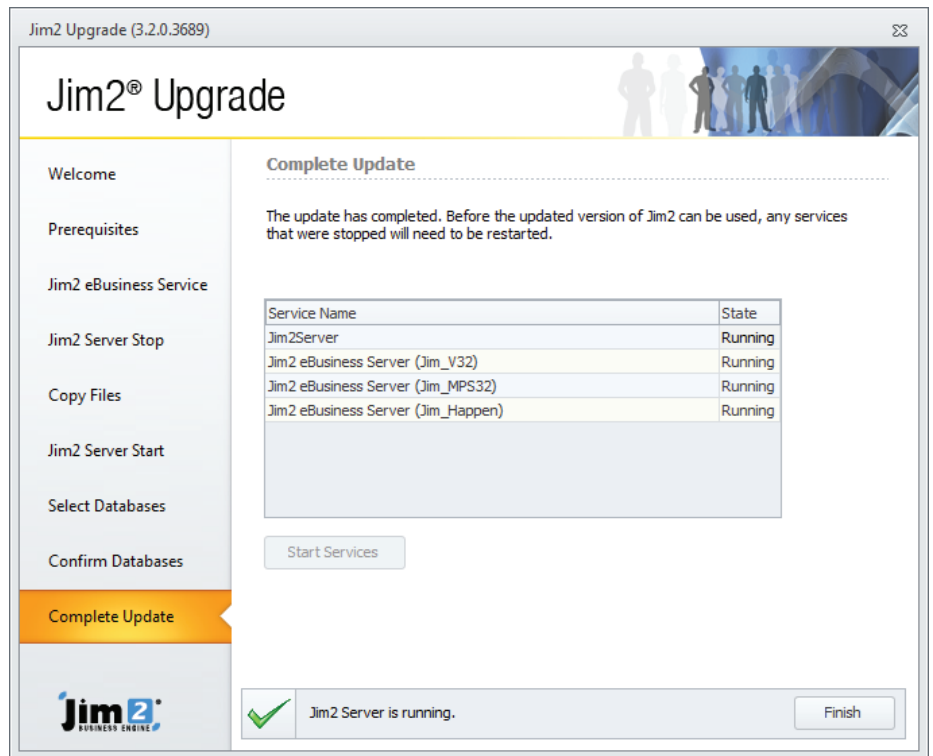
If there are any issues updating the database you will be alerted here, and should follow any given instructions.
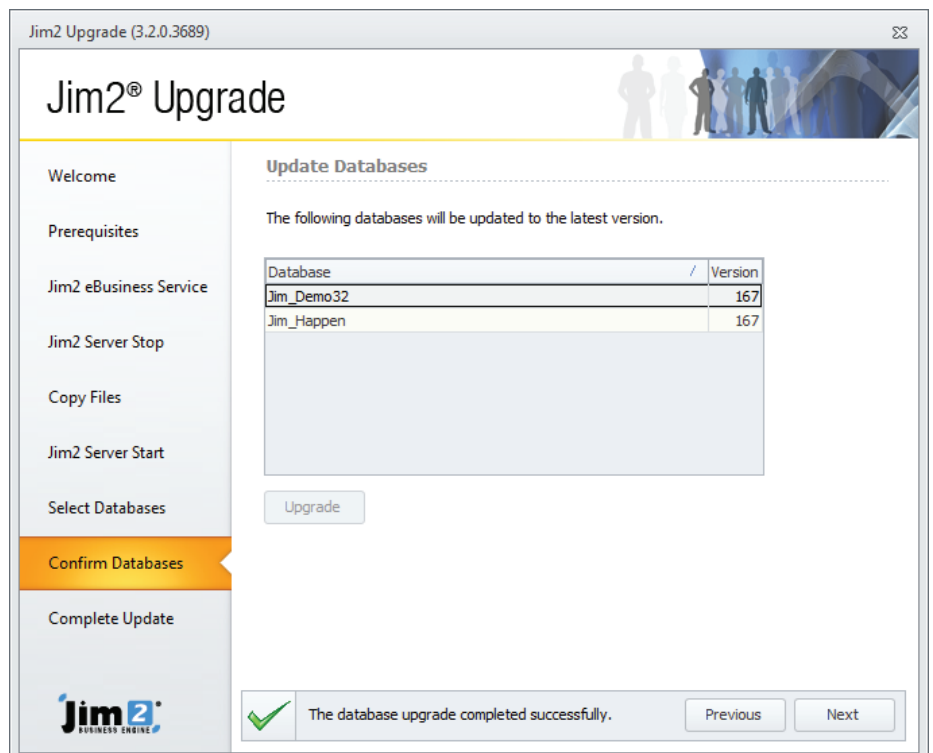
Complete Update

The update is complete. You may need to start the Jes services by clicking 'Start Services'.

Click 'Finish' once the services are started. The updater will now close.

The Jim2 Update also installs the latest Jim2 eBusiness Framework (Jef) setup. If you are using Jef you will need to run the setup to update your website after you have completed the Jim2 Update.

Firewalls

If you are running a Firewall on your server, you need to make sure that the Jes Service is accessible from the Jim2 Client. The Updater will alert you to fix the Windows Firewall if it sees an issue. If you are using a third party Firewall you will need to manually adjust the firewall rules. The best way of doing this is to allow an exemption for the application: jes.exe in your Firewall application. If you are not sure of how to do this, please consult your I.T. provider for assistance.

Microsoft .NET 3.5 Framework Requirements

Jim2 Clients (Jim2 .exe) and Server now require the Microsoft .NET Framework version 3.5 (with Service Pack 1 or later) on all computers using Jim2 ®.

If you do not have .NET installed you will get the following warning when starting Jim2 ®:
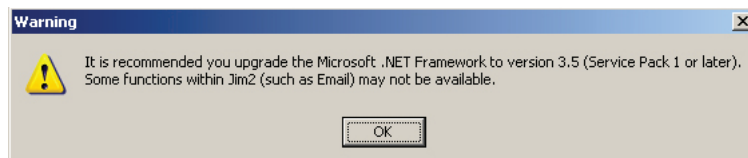
You will still be able to use Jim2 ®, but some features like previewing and sending emails, and using Dashboards will not be available. We advise if you get this warning you should update .NET as soon as possible. Please consult your I.T. provider if you require further information on updating your computer.

Jim2 DB Update

The Jim2 Database Update Program (Jim2 DBUpdate.exe) user interface has also been improved.

Jim2 Training

Jim2 Training is available for your Staff. Training is conducted at our premises at Mortdale NSW, or remotely via the Web. We are able to conduct training on a one-on-one basis, or group training. Onsite training at your business is also available.

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