User Guide

Getting Started

Jasmin

Index

1.Introduction

Welcome to the Jasmin universe! This user guide includes some basic context information about Jasmin that will provide you with a simple, easy and enjoyable user experience. And, of course, allow you to be efficient and effective in using the product's full potential.

2. Subscription

Subscribing to Jasmin is simple:

- Go to the Jasmin first login page to create your account;
- Create your user account – enter your name and email, a password, confirm it, click **Register** and Jasmin will send you a customized email. Access your email inbox and **Confirm** your registration.
- Activate your account: re-enter your email and password in the corresponding fields and click **Confirm**;
- The next step is finishing your subscription: select the desired price plan, choose the subscription period – 1 or 2 years – enter your billing details such as the Name, Tax ID and the payment method.

You will receive a confirmation email with the payment details. Once the subscription is completed, you will be redirected to Jasmin. You can access using your credentials. The system will ask you to verify your details, based on the data you entered in the billing step. If necessary, you can change this information. Jasmin will then create your company automatically.

Step 1

Buy
Subscribe to the desired plan

Step 2

Register a user account
Access your email
Confirm

Step 3

Activate your account

Step 4

Finishing the subscription
(Pricing plan, period, billing and payment details)

3. Starting page

When you access Jasmin for the first time, an online wizard will help you get familiar with navigation and guide you through some initial tasks, such as creating the company, customers and items.

Every time you access Jasmin after this first contact, you will be shown the starting page, which is divided into the following areas:

- Personal Area;
- Search;
- Navigation menu;
- Drafts;
- Quick actions;
- Information display area;
- Action buttons.

3.1. Personal Area

This area is located in the upper right corner of the application and gives you access to the following options:

- Logout;
- Profile;
- Users;
- Subscription;
- Support Request;
- Change Theme.

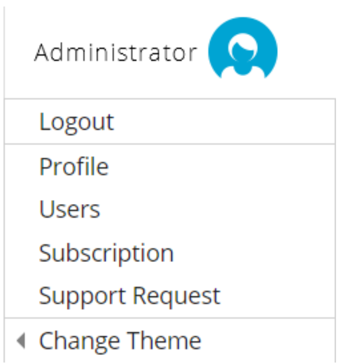


Image 1

In this area, in addition to logging out, you can modify several personal settings, such as:

- Editing your user profile;
- Adding a profile photo;
- Changing your password;
- Inviting users;
- Removing users;
- Viewing subscription details;
- Buying a subscription;
- Creating a support request;
- Selecting a new theme for the application (light or dark). The dark theme is advised for nighttime use and to save battery.

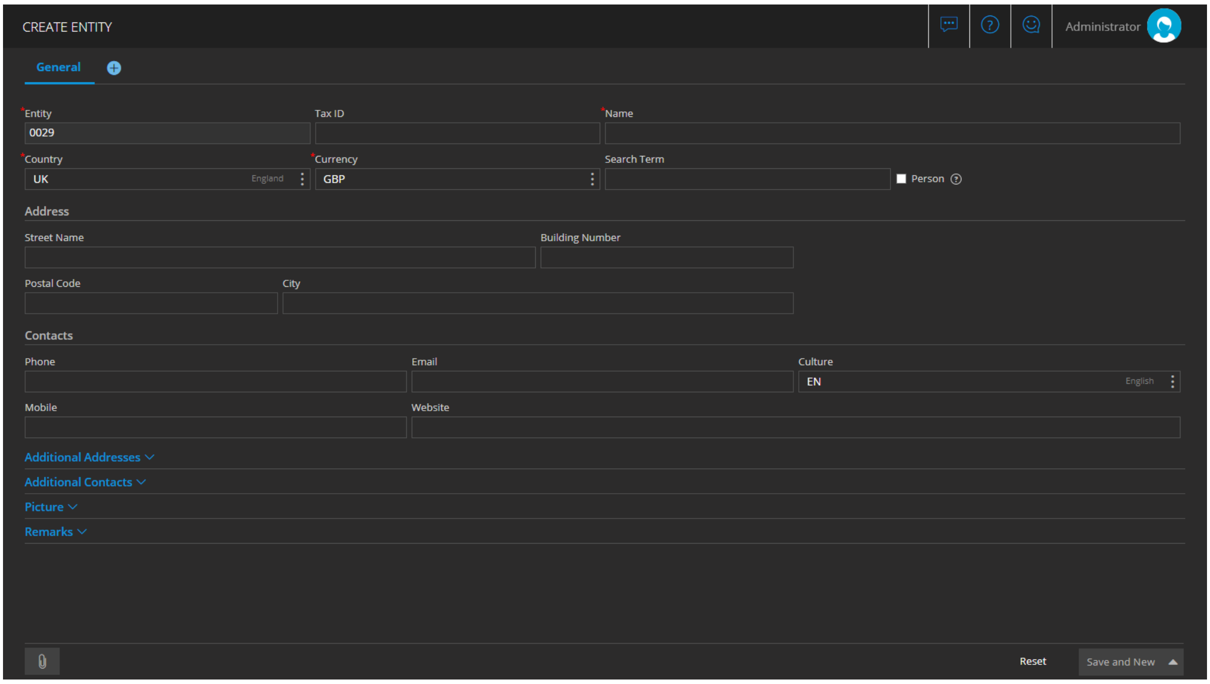


Image 2

3.2. Search area

Jasmin includes a useful search feature. Just enter the full name or part of the name of the action or area you want to search for and the system will return matching results automatically.

Image 3

3.3. Navigation menu

The main navigation menu to the left allows you to access features in only **3 levels**. This menu is designed for an easy management of your business and tasks are organized into themes **– Sales** → **Purchases** → **Expenses** → **Payables and Receivables** → **Stocks** → **Taxes** → **Results** → **Setup**.

Some menu options may not be visible due to your subscription type. For example, access to the **Online Store** configuration submenu is only available to Premium subscribers.

The menu uses different colors to allow you to quickly identify in which management area you currently are.

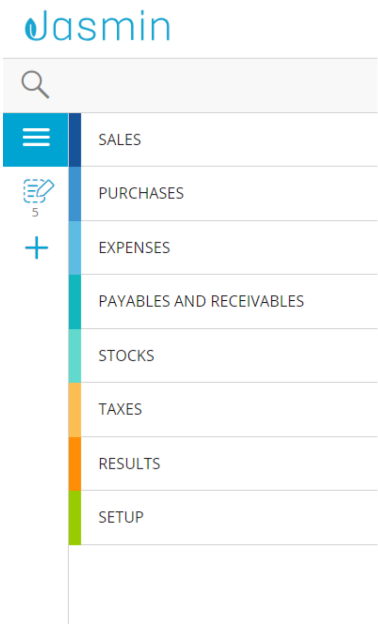


Image 4

3.4. Drafts Area

Jasmin keeps all your ongoing work safely stored in the server until you finish or complete your task. To provide further support for this, the menu includes a **Drafts Area** below the main menu to the left, where you can access and resume any work in progress you left unfinished. This way, you can always resume your work if you need to stop in the middle of a task, logout, or if you lose connection, simply by accessing the corresponding draft.

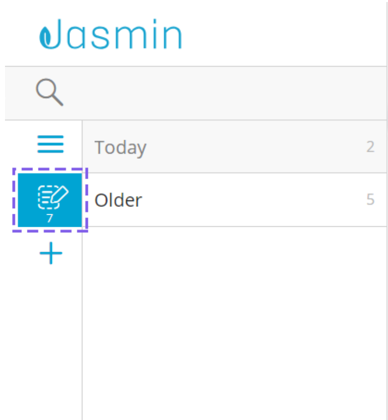


Image 5

Drafts are grouped by date – **Today**, **Yesterday**, **Last Week**, **Last Month**, etc. – and a total number of drafts is displayed for each group.

Only the logged user's existing drafts are displayed in this area:

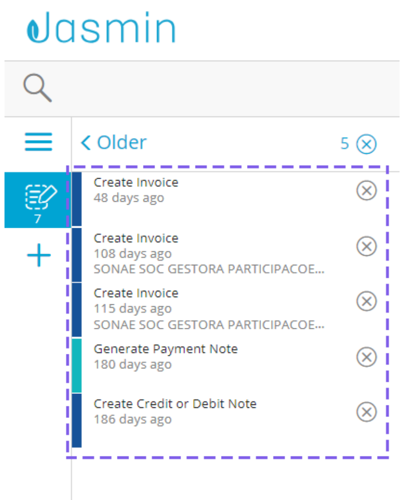


Image 6

Please note: drafts are only saved for some of the main system records (for example: invoices, orders, etc.).

Deleting Drafts

Grouped drafts can be deleted individually by clicking the remove icon, or in batch by using the **Remove All** button, which will delete all drafts in that group. Please note that you cannot delete a draft while it is open by the user.

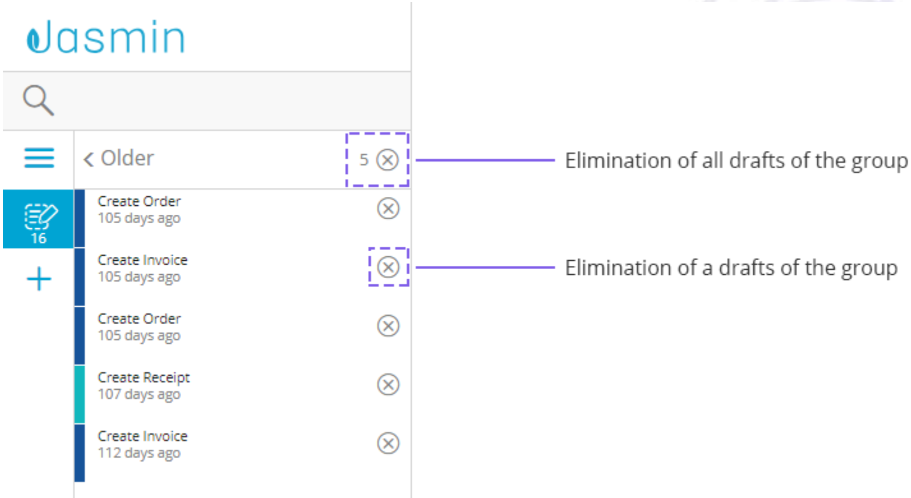


Image 7

3.5. Create quick actions

The **Create quick actions** feature is a shortcut for creating common tasks. Selecting it will open a menu with options for creating invoices, customers, sales items, receipts or expense reports directly by opening the corresponding creation screen.

To create a quick action click the **Create quick actions** button (+) and select the entity you wish to create – **Invoice**, **Customer**, **Sales Item**, **Receipt**, **Expense** or **Delivery**.

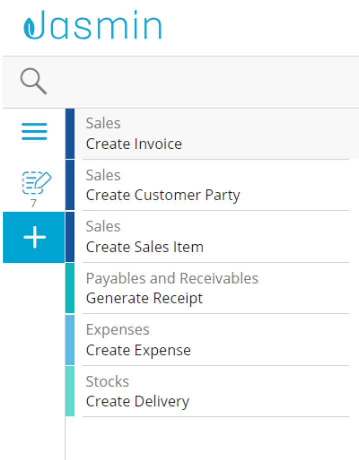


Image 8

You will be redirected to the corresponding creation screen. From that screen, simply enter the necessary data and save your information.

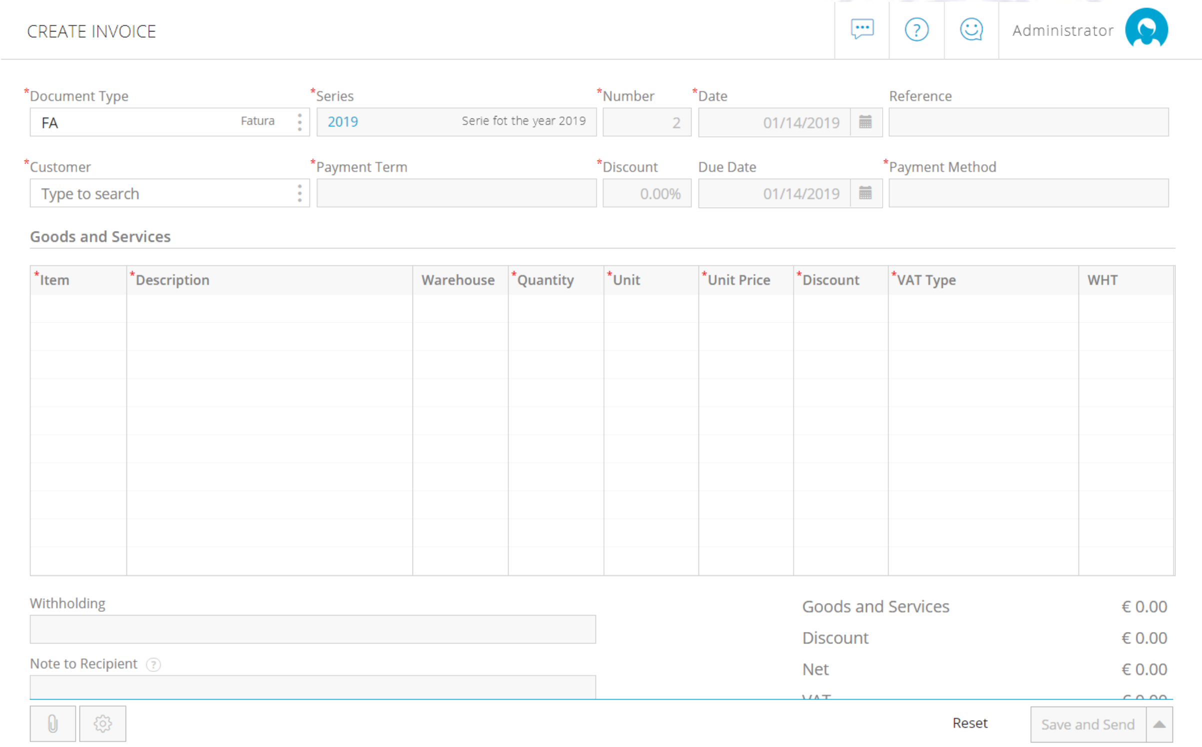


Image 9

3.6. Information display area

By default, the information display area shows an overview of your organization - the Dashboard.

The Dashboard includes a widget that allows you to **import records** using a .CSV or a SAF-T(PT) file. Selecting the import option will redirect you to the **File Import** area. This widget is only shown for new subscriptions, but you can access the file import list at any time from **Setup | General | File Import**.

Please note that when you import the SAF-T(PT) file, payables and receivables account transactions, customers and items will be created in Jasmin.

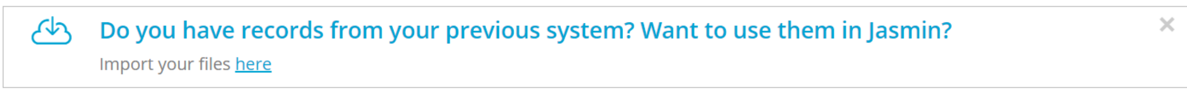


Image 10

From the Dashboard you can also **create a budget** and quickly view the state of several key performance indicators (KPI) of your company.

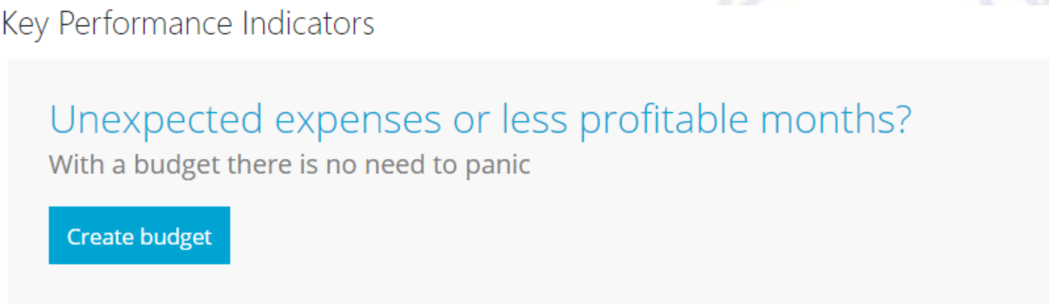


Image 11

Your organization’s KPIs are built using your company’s budget, sales invoices, expense records and profit and loss report information.

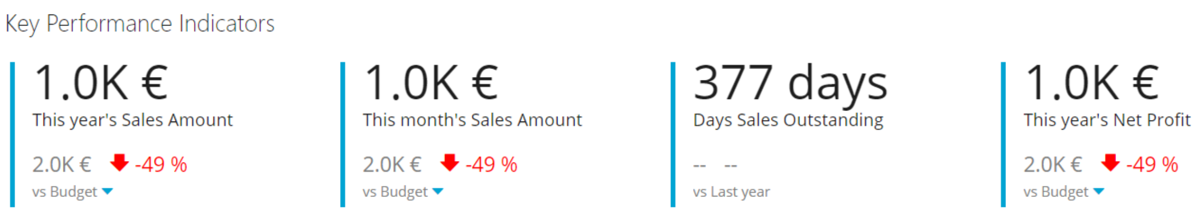


Image 12

You can also view open sales and purchase items, a profit and loss chart and payables and receivables open items.

Image 13

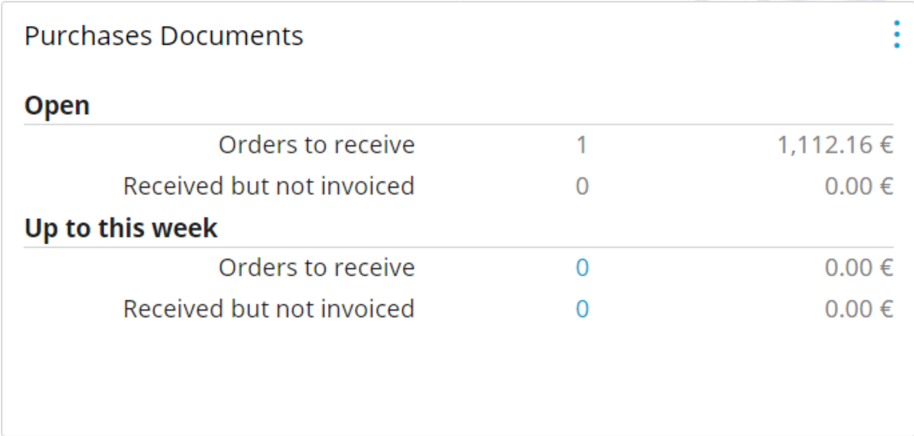


Image 14

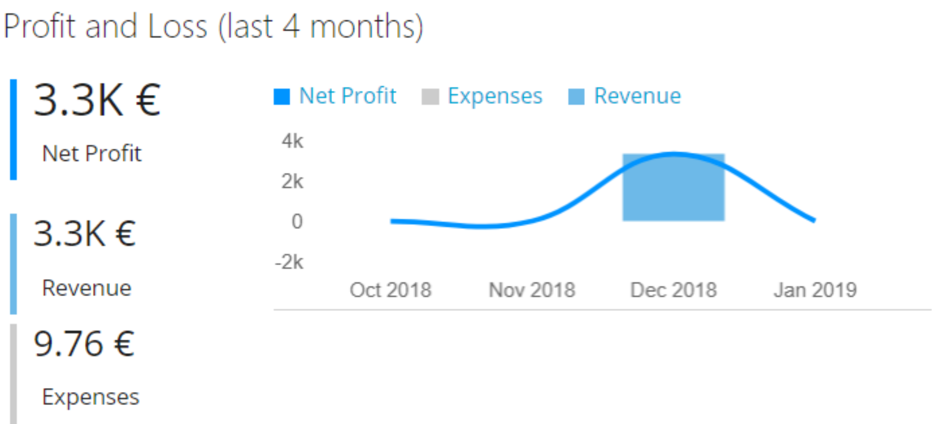


Image 15

The Dashboard sections also allow you to address the work that needs to be done in each area. You can click the three dots button in each card to quickly launch actions you may need to access for carrying out your work in each area. These options can be used as "shortcuts" to the most common tasks of each area, such as creating an order or an invoice in the **Sales Documents** section.

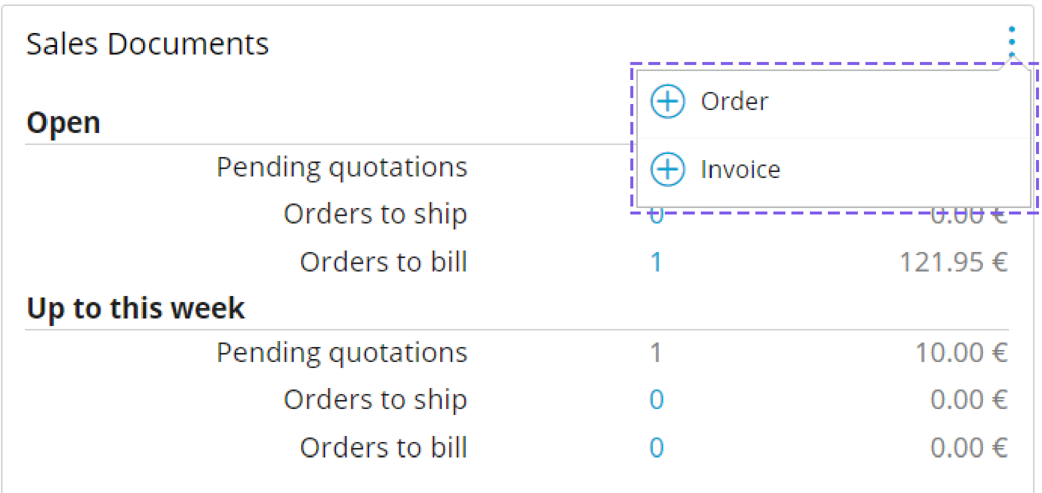


Image 16

These shortcuts will be different for each card in the Dashboard. For example, the **Purchase Documents** card will open **Purchase Documents** options, allowing you to quickly create an order or an invoice.

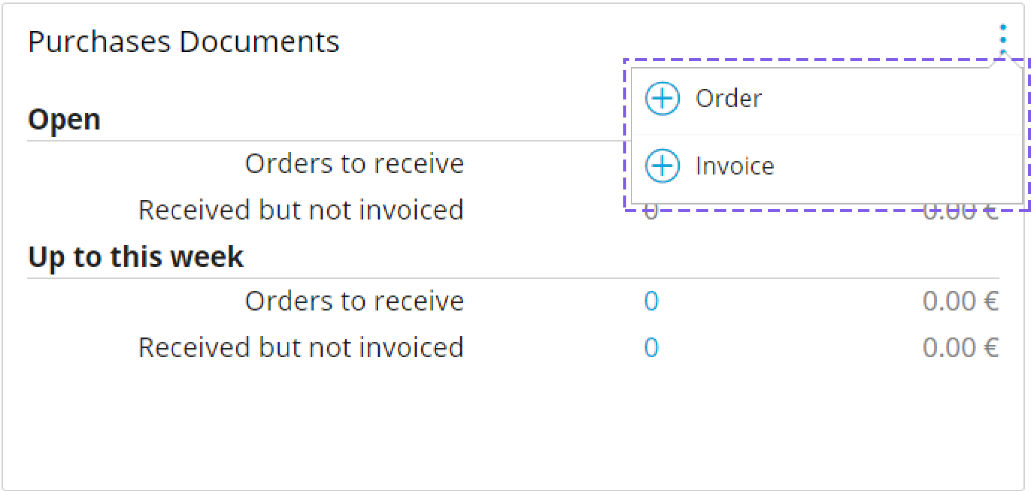


Image 17

Hovering with the cursor over the charts available in **Cash Flow Forecasting** will display information to support you in interpreting the chart.

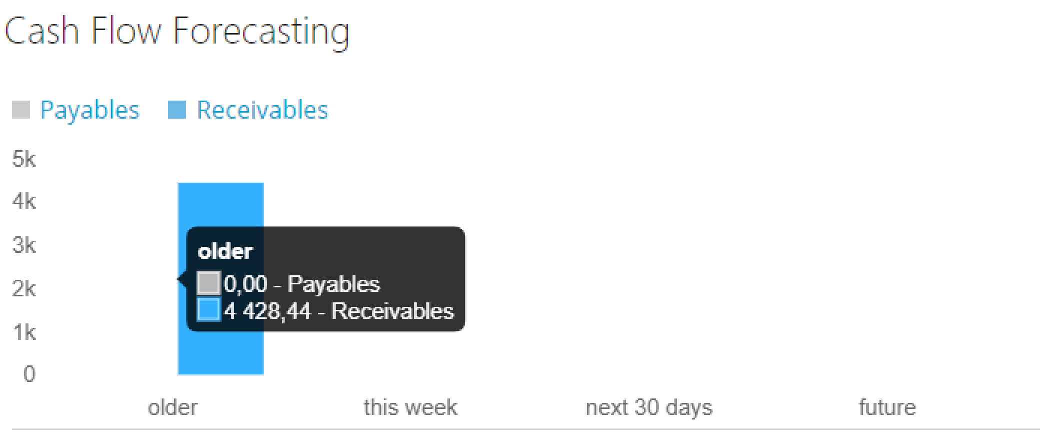


Image 18

Apart from the initial Dashboard, there are also information panes on the right of the screen that provide you with details on Entities and Items when creating Orders and Invoices.

To view the side pane, click the icon.

The pane will display information on the item.

To close it, click

Image 19

3.7. Action buttons area

Action buttons are displayed at the bottom of pages in Jasmin. You can find the following buttons:

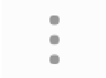
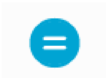
	Attach a file.
	Settings (configure lists or access printing settings).
Create	Create a new record.
View	View details about a record.
Save and New	Save information and create a new record.
Send	Send the record or document via email.
Save	Save a record or document.

Save and New	Save and create a new record.
Save	Save a record.
Save and Print	Save and print a record.
Save and Send	Save a document and send it via email.
Edit	Edit a record or document.
Print	Print a document.
Refresh	Update visible information.
Process	Process a sales or return order.
Copy to New	Create a new document by copying information from an existing document.
Printing Settings	Configure which information will be printed.
Convert Into	Copy information from one document to another.
Send	Send a document.
	Delete a record.
•••	Print or export a page or list to CSV format.

3.7.1. Other buttons and commands

In Jasmin you will also find other common action buttons, commands and icons which are not in the actions area, such as these:

?	Application help
	See the user photo and access the personal area.
	Search
	Menu
	Drafts
+	Create new (quick actions)

	Add new record
	More options
Order	Create a new order
Invoice	Create a new invoice
Receipt	Create a new receipt
Payment	Create a new payment
Create budget	Create a budget
Apply	Apply selected filters
	Picture (of an item)
	Picture
Add Above	Add a row above
Delete	Delete current row
Copy to End	Copy row to the bottom of the list
Taxes	View tax calculations for the selected row
Withholding fields	See fields associated with the record (row) which are not visible from the table
List	Show possible options for the field
Create	Create a new record.
Record	Access to that record's data
	Archive records
	Close
	View the dashboard
	Drill down
	Duplicate
	Edit

	Email
	Send email
	Connection lost
	Insert
	Exit
	Export
	Import
	Load data
	Reload data
	Help
	Information
	Save
	Print
	Reset custom settings
	Zoom in
	Zoom out
	Warning
	Calendar
	Date
Correct through	Create a credit or debit note to rectify a transaction
Receipt	Generate a receipt for the transaction

Generate	Automatically create a document based on available data
Save and Print	Save the record and create a PDF preview
Generate Return Order	Enter an item return
Select	Choose the current item
Download file	Download the template file that you can fill in with your data for importing entities into the system
Reverse all imported entries	Cancel an importation of data
Communicate	Send your data to the Tax Authority for validation (PT market)

4. Types of screens

In general, Jasmin is comprised of 3 types of screens:

- Simple forms
- Documents
- Processing screens

Simple forms − These screens are used for viewing and editing the business' data and simple configurations. These can be accessed via lists.

Some examples:

- Document types
- Units of measurement

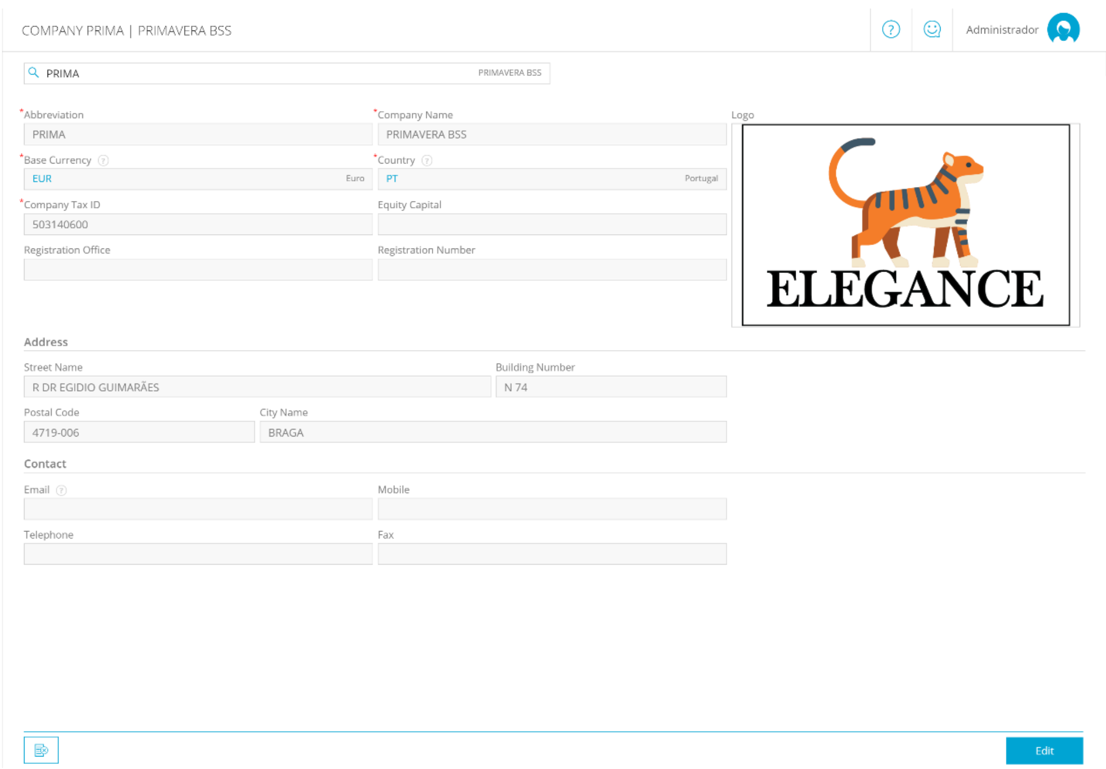


Image 20

Documents − These screens are used for viewing and editing documents. Please note that documents are created directly by accessing the corresponding menu options, using the company's details. Some examples are **orders** and **invoices**.

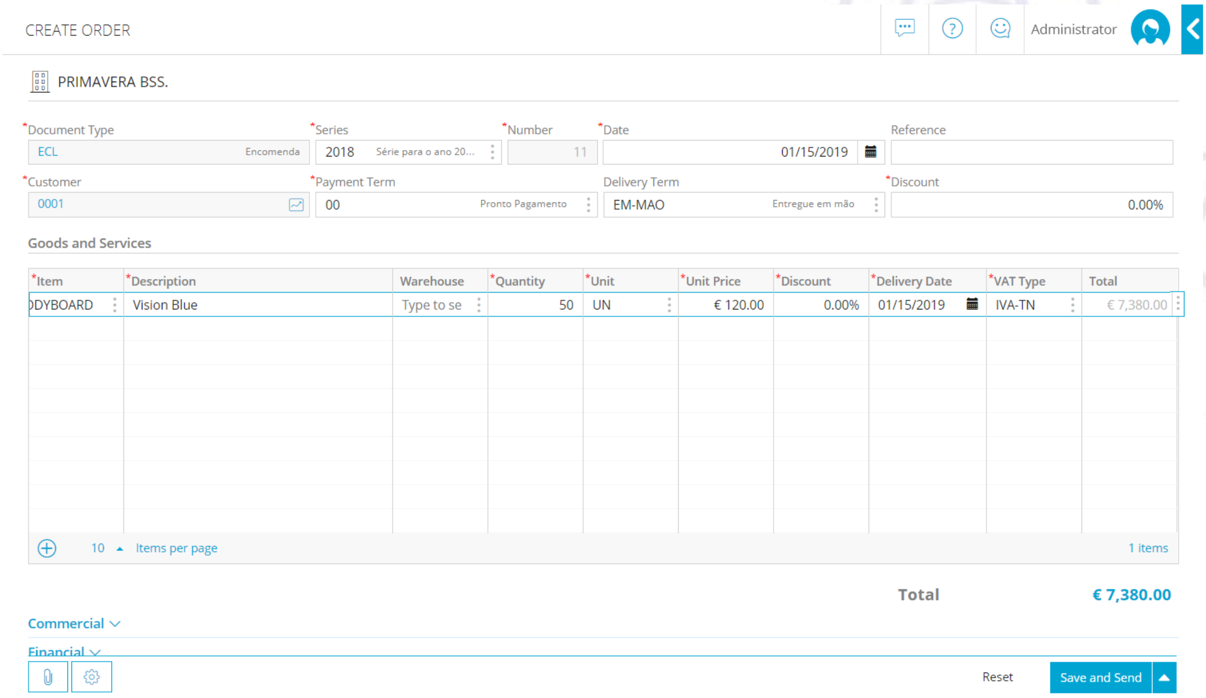


Image 21

Processing – These screens are used to perform a specific process. This action requires the document being processed.

Some examples are creating a document for the transportation of goods (**Goods Receipts** or **Delivery Orders**) or processing an order to **generate an invoice**.

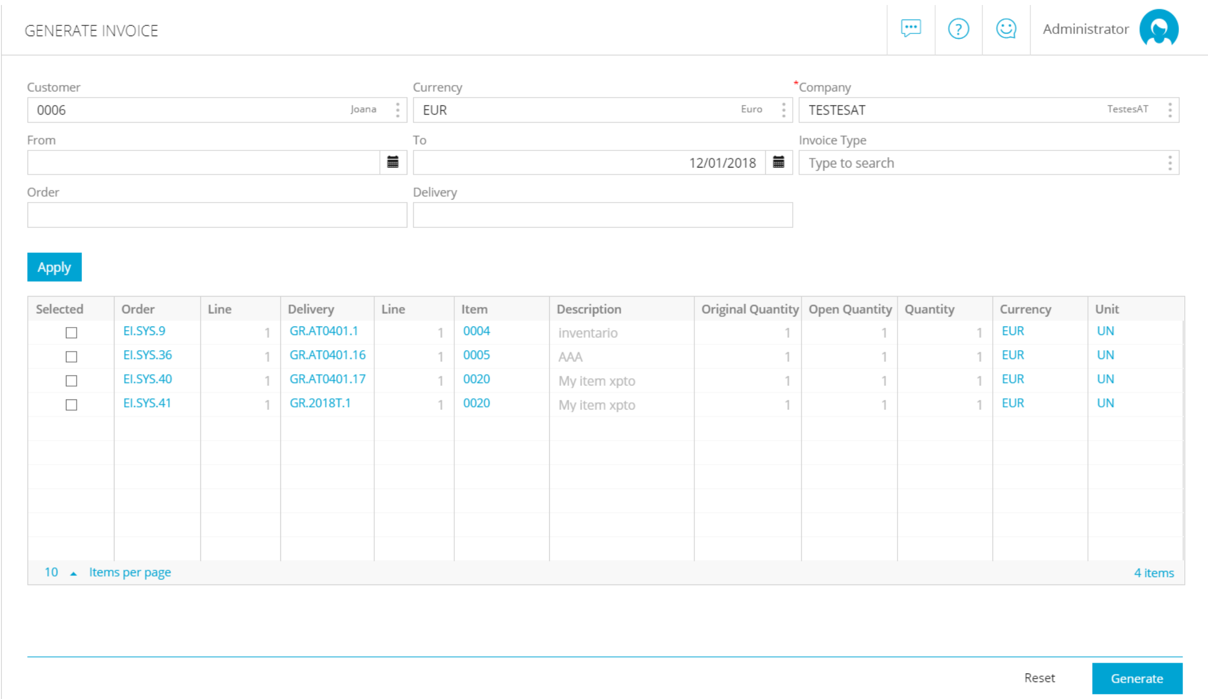


Image 22

In some cases, processing a document requires previously editing a document and then copying it to **convert it into** the document you want to create.

Jasmin includes a **Convert Into** / **Correct through** feature which is useful for creating a record from the next step of the flow of documents, based on the current document.

Some examples:

- You can create a credit/debit note from an invoice to rectify a transaction. This allows you to fill in all the information for creating the debit/credit note, since these details are already in the invoice. In addition, these documents will be linked and the target document (the note) will mention the original document (the invoice).
- This also applies to the budget > order flow.

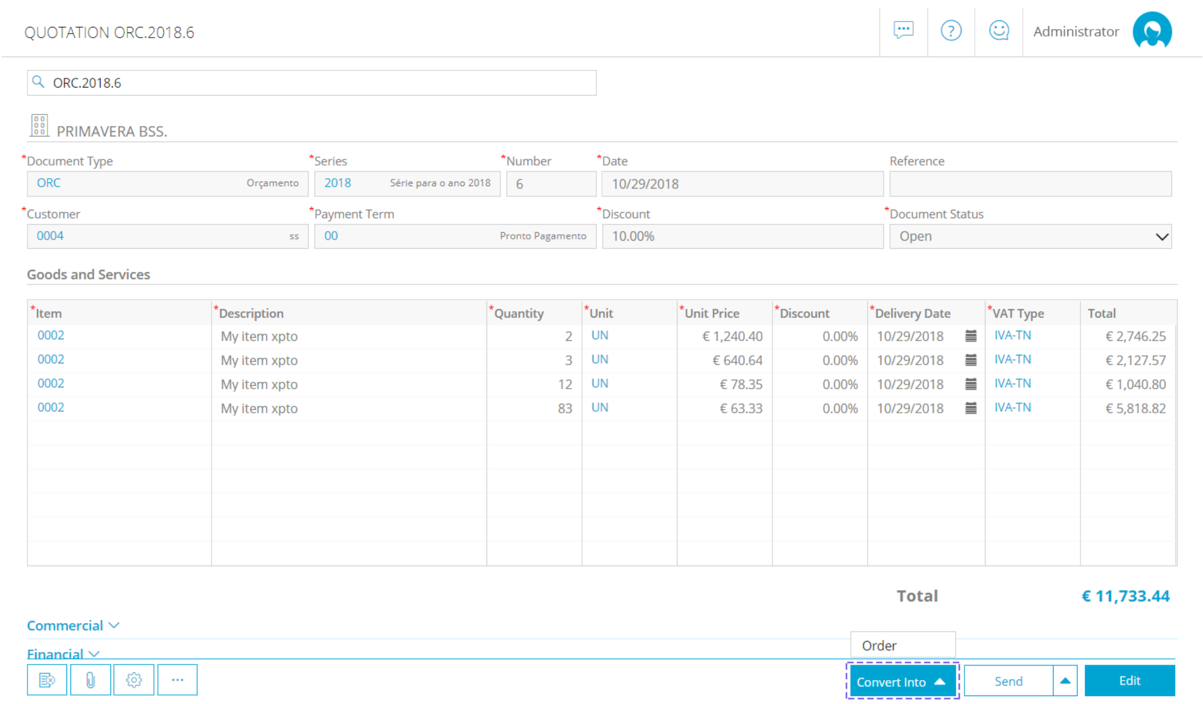


Image 23

5. *Selecting the company when creating records*

If you have access to several companies associated with your organization, you can select for which company operations are performed. Please note that, by default, the system will use the selected company when creating company dependent records, such as an invoices or order, but you can change this. If you still haven't created any records, this field will use the first company created.

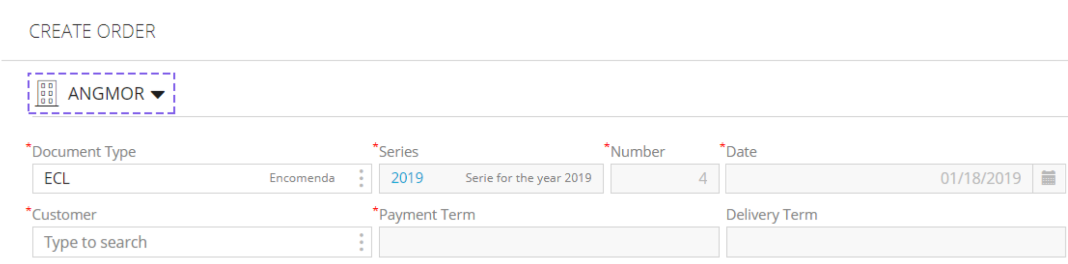


Image 24

If you only have access to a single company, this field will not be displayed on the create/edit page because all records will be associated with that company.

6. Accessing records

You can access a record that is mentioned in another view by using:

- **The record's hyperlink –** This option is available when the document is in view mode or when the field of the record you want to access is filled in and disabled.

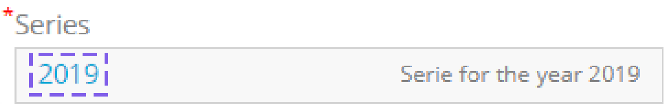


Image 25

- **The 'Record' context option –** When a field is filled in and not disabled, which means that the data can still be changed. You can access the record through the field's options menu by clicking **Record**.

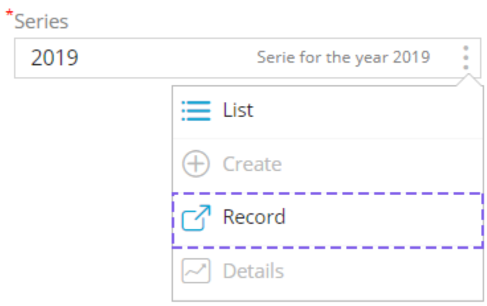


Image 26

Please note that the '**Other Options**' icon will only be visible if the field allows editing.

- **The hyperlink in the record's description** – In the same situation (if the field is filled in and not disabled), and if there is a field description, you can also access the record by clicking the link in the description.

Image 27

This feature is also available for record lists for which the system allows drill down actions from other contexts.

Drag a column header and drop it here to group by that column.

Payment Status	Date	Invoice	Entity	Tax ID	Name	Reference	Total
Pending	1/15/2019	FA.2019.3	0001	211870137	Thomas	Customer	€ 123.00
Overdue	1/10/2019	FA.2019.2	INDIF		John		€ 123.00

Image 28

7. Actions on the record's details grid

There are several helpful operations available when you create a record with a details grid. When you access a record's details grid, the following context options are available, depending on your access method:

- Operations available on the details grid when **creating an order**

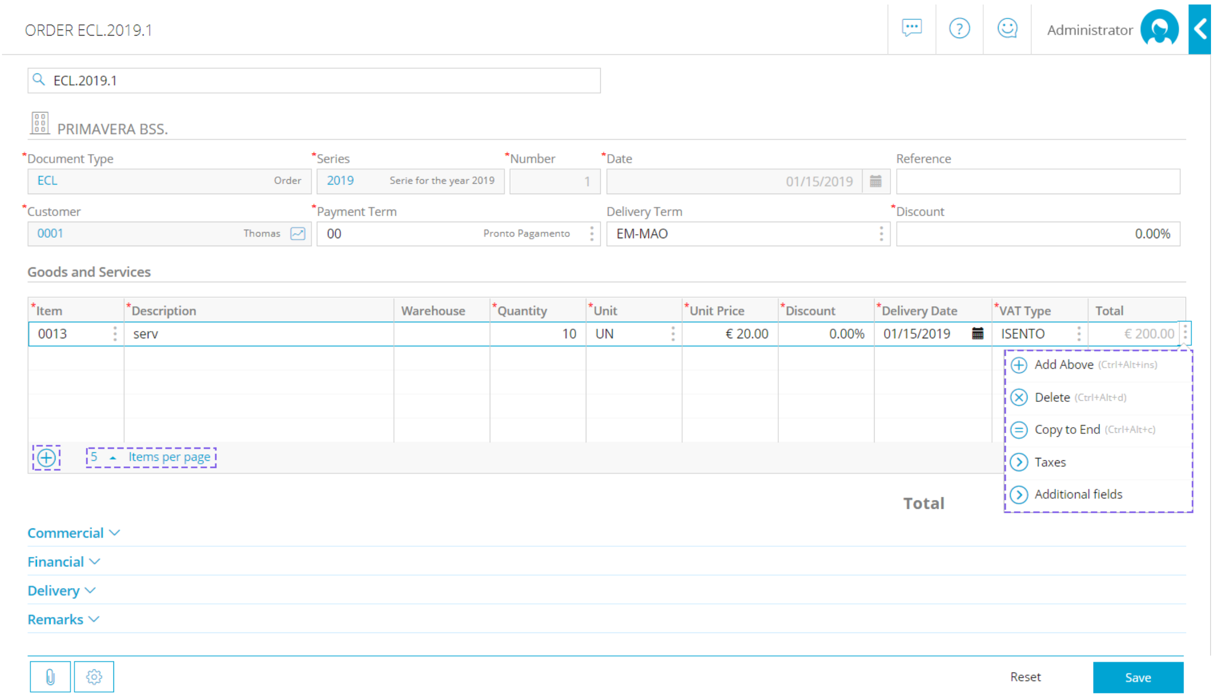


Image 29

- Operations available on the details grid when **viewing an order**

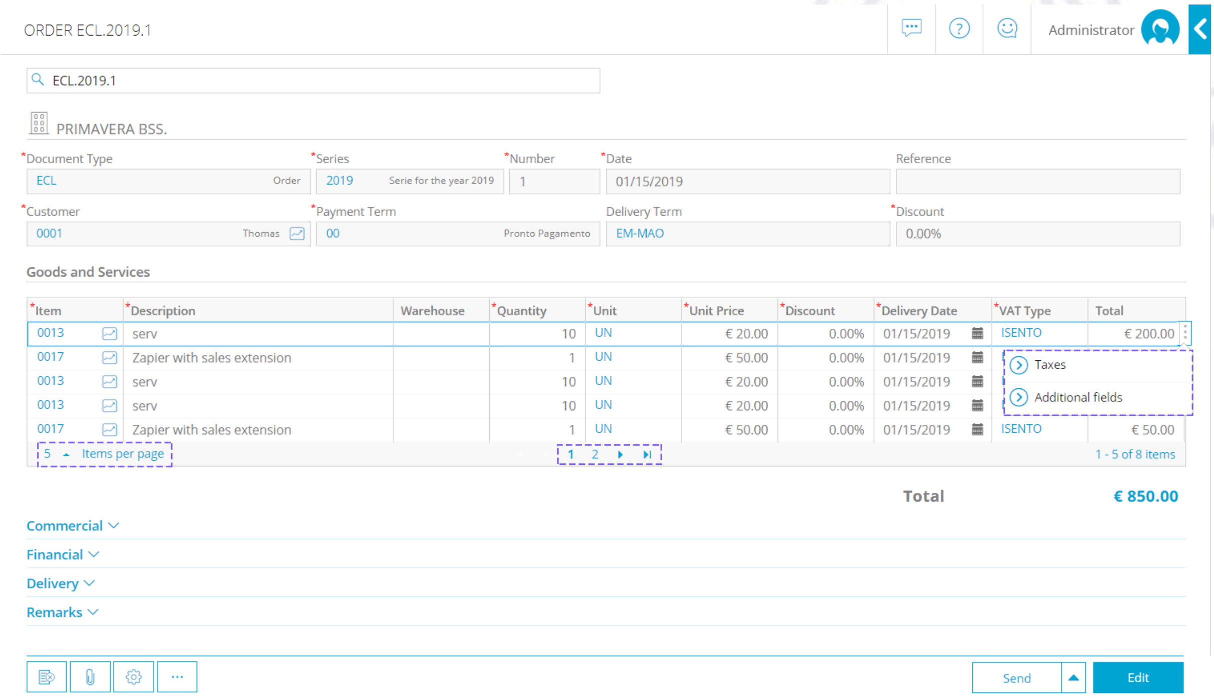


Image 30

- Operations available on the details grid when **editing an order**

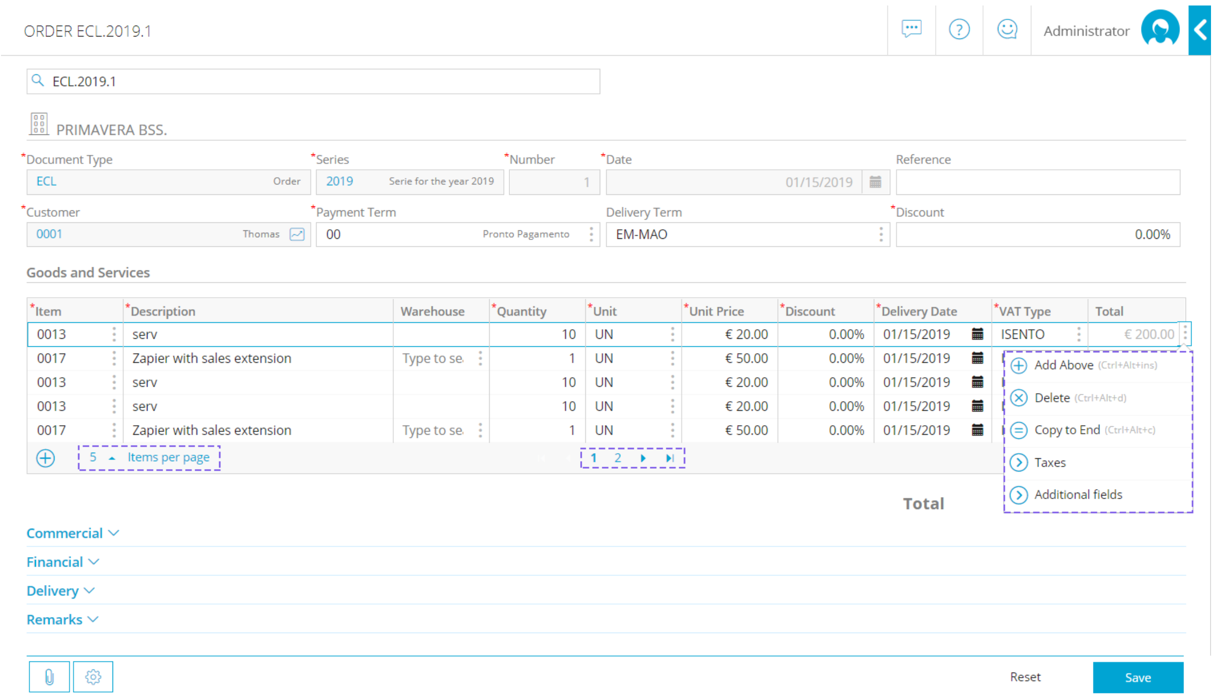


Image 31

Operations have the following behavior:

Operation	Behavior
Add Above	Adds a new row above the selected row.
Delete	Deletes the selected row.
Copy to End	Copies the data from the selected row to a new row at the end of the grid.
Taxes	Displays a pop-up window with a breakdown of all tax values applied to the selected row.
Additional fields	Displays a pop-up window with further price information on the selected row.
'+'	Adds a new row at the end of the grid.
Items per page	Allows you to specify the number of items to be displayed on each page of the grid.
Page navigation	This action is only available if there are more items on the document than the value set in "items per page". You can go to the next page by clicking the **>**, navigate to the last page by clicking the **>|,** go straight to the desired page by clicking the corresponding number or use the **|<** icon to return to the first page.

The following operations can also be performed using the keyboard when you are creating or editing a page:

Key	Behavior
Navigation keys (arrow keys ← ↑ ↓ →)	The cursor navigates the selected field in the direction of the key pressed.
Enter or ↲	The entered value is saved and the cursor changes to the next field applicable field. If there are no more applicable fields to enter, the cursor moves to the next row. If there are no more rows, a new one will be created and navigation stops until the field is correctly filled in, if required.
Esc	Cancels editing and deletes the selected row if no data has been entered. If the row is already filled in, this key will not perform any action.

8. Extensions

All entities with which the company interacts - customers, suppliers or others - have a common base. For example, a customer who buys items from an entity can also be a supplier of items or raw materials to that entity. To specify a new type of interaction for an entity, you can enable the corresponding extension.

To do this, click the icon to add a new type of relation between the entities − **Financial Institution**, **Salesperson**, **Customer**, **Supplier** or **Bank Account**.

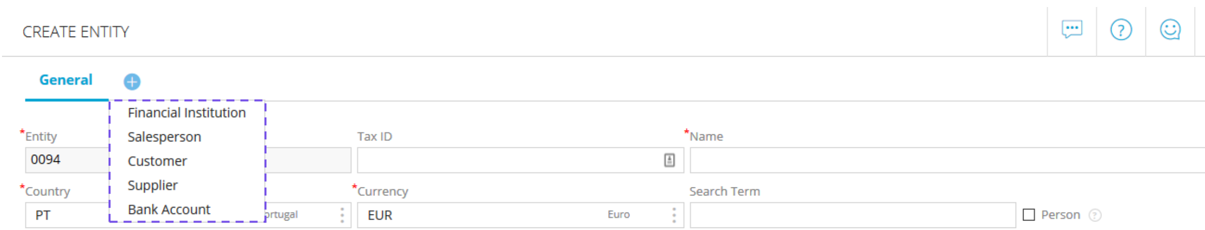


Image 32

Items can also be associated with several extensions, allowing them to be used in the context of purchases, sales, inventory, etc..

A record that contains extensions consists on a basic part with general information and extensions with applicable context information.

Enabling extensions

If there are extensions associated with an entity, corresponding tabs will be available at the top of the entity's page. The tab with the basic entity information is named **General** and information on the extensions can be found in the matching tabs. Available and unused extensions can be accessed from the drop down options displayed when you click the '**+**'.

Example − An item where extensions can be associated, but where none are enabled:

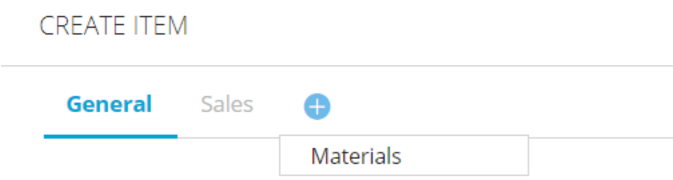


Image 33

To enable an extension simply click on the desired extension from the drop down options, which will create a tab for that extension:

Example – An item where the **Sales** extension is enabled (a “sales item”):

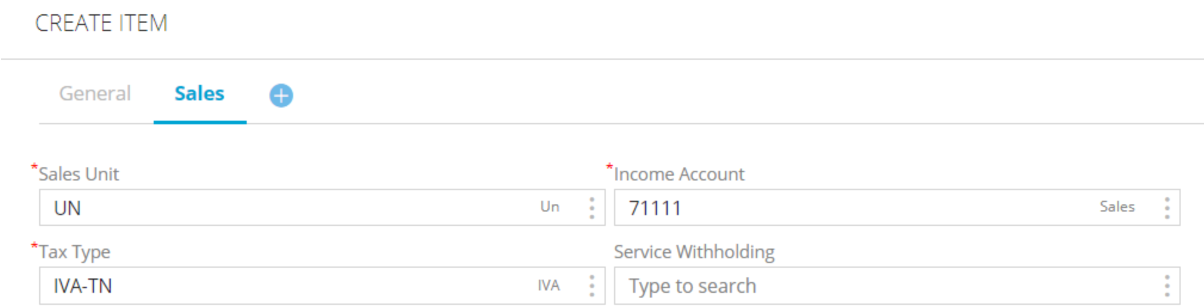


Image 34

Extensions will no longer be available from the drop down options after being enabled.

Disabling extensions

To disable an extension, edit the desired entity and click the ‘**X**’ on that extension tab:

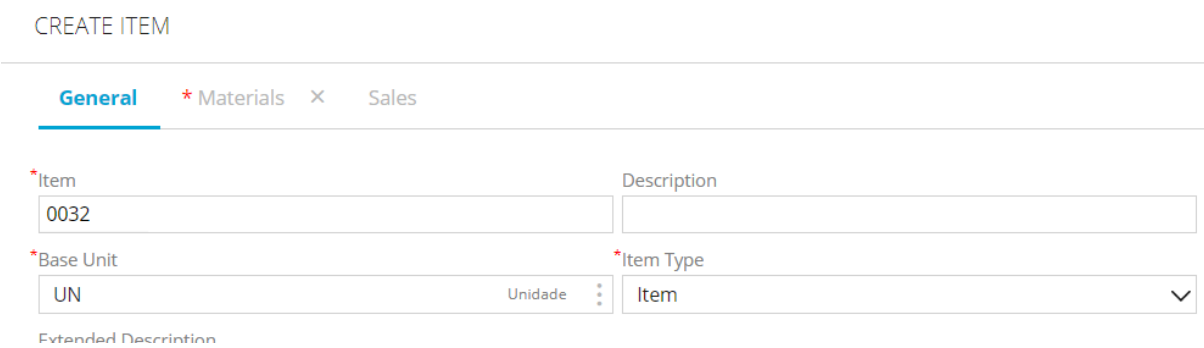


Image 35

After this, that extension will be available in the drop down options again.

Please note that disabling extensions does not delete the extension's data. You can re-enabled it later and all your previous details will still be available.

9. Lists

List pages display all records for an entity in a grid view. There are some operations you can perform on list pages to make it easier to find the information you are looking for, such as:

- **Searching for records** – You can use the search area to lookup specific records by specifying the search conditions (on the right) and typing a search word.

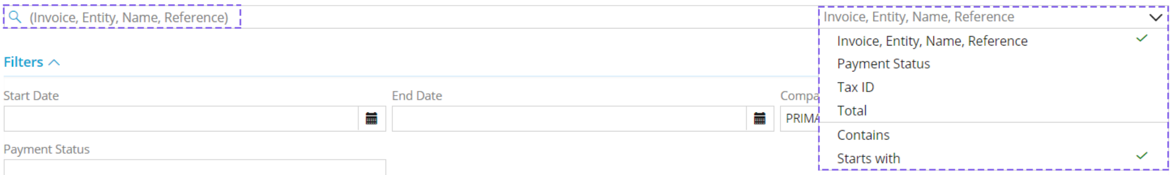


Image 36

  The list will only show records that meet the search criteria specified.

- **Filtering records** – You can also use filters to only view the information you need. To do this, enter any applicable filter criteria in the **Filters** section (**Start Date**, **End Date** and **Company**) and click **Apply**.

Image 37

  The list will be filtered and only records matching the specified criteria will be displayed.

- **Grouping** – This feature allows you to analyze the listed records by grouping them into columns. To use it, drag the desired column headers into the grouping area:

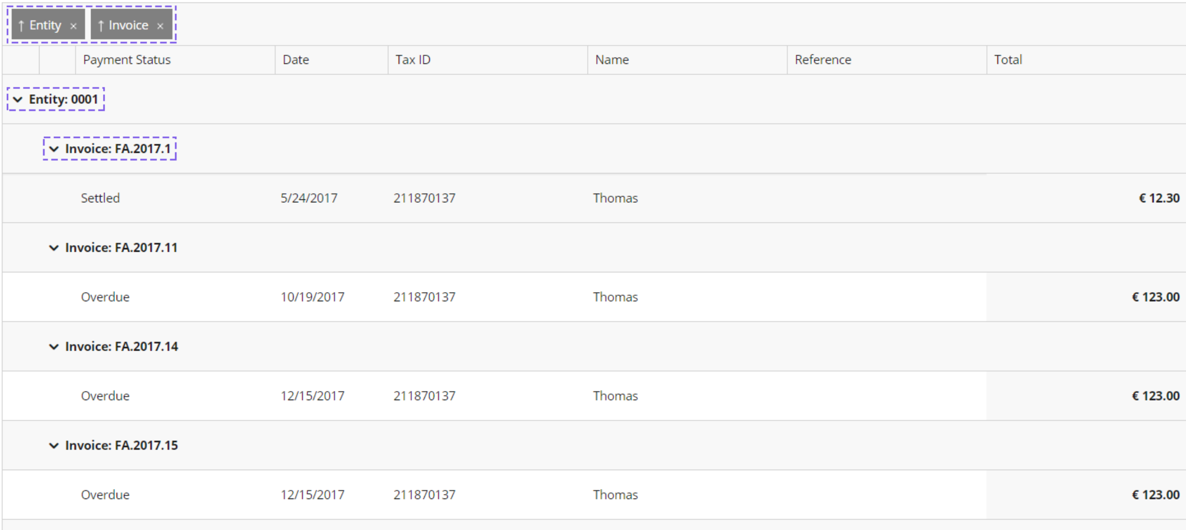


Image 38

This feature allows you to view information according to your specific needs, by expanding and collapsing groups of records as you find necessary (by clicking ‘**v**’ and ‘**^**’).

- **Sorting** − You can sort records using the columns or existing groupings. This feature is only available for some entities.

- **Items per page** − this option allows you to specify how many records you want to view in each page:

Image 39

- **Navigating pages** − you can easily navigate between list pages using the options at the bottom of the list.

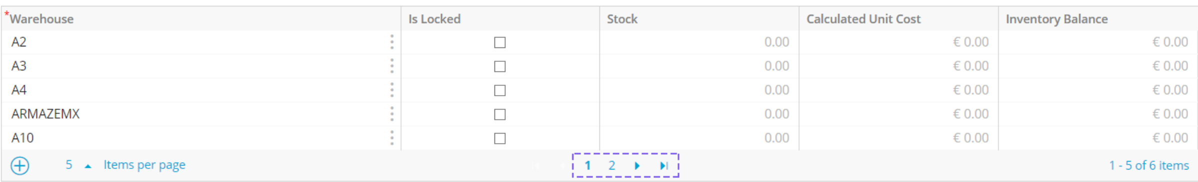


Image 40

- **Viewing the selected record** – to view any record from list pages, simply select it and click the **View** action button on the bottom right.

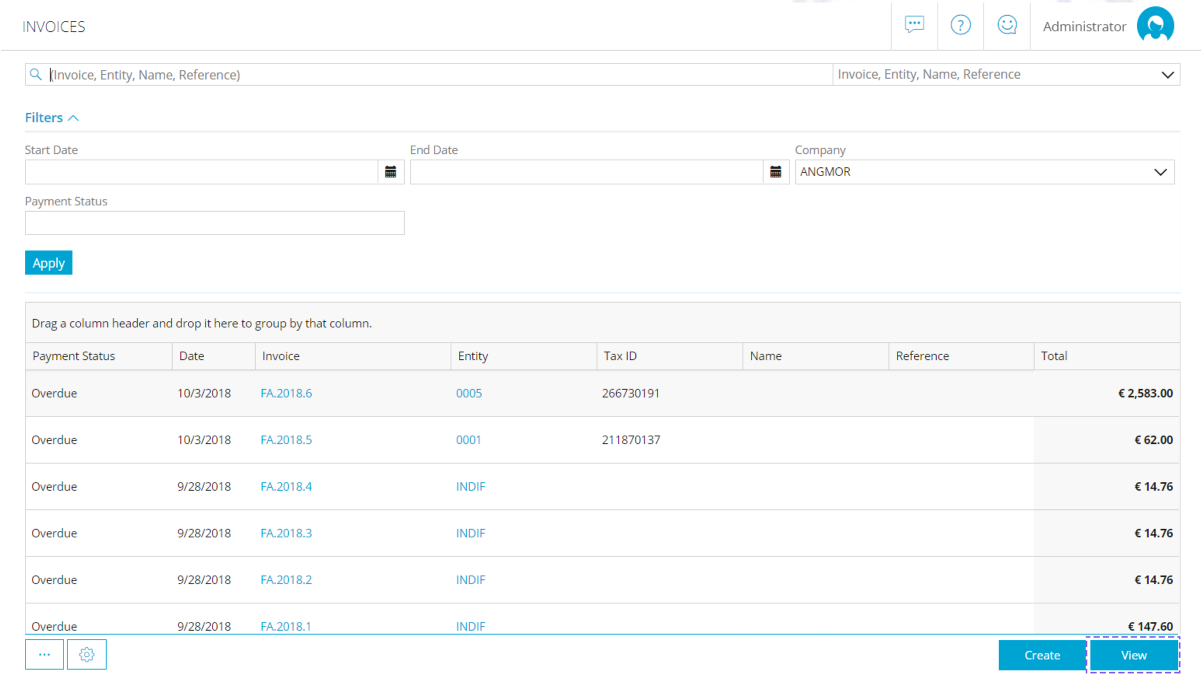


Image 41

- **Printing/Exporting** – if you wish, you can export lists to .CSV file format or print them. You can run these operations for the entire list or for the records currently displayed. To do this click the '**...**' action button on the bottom left and select the desired option.

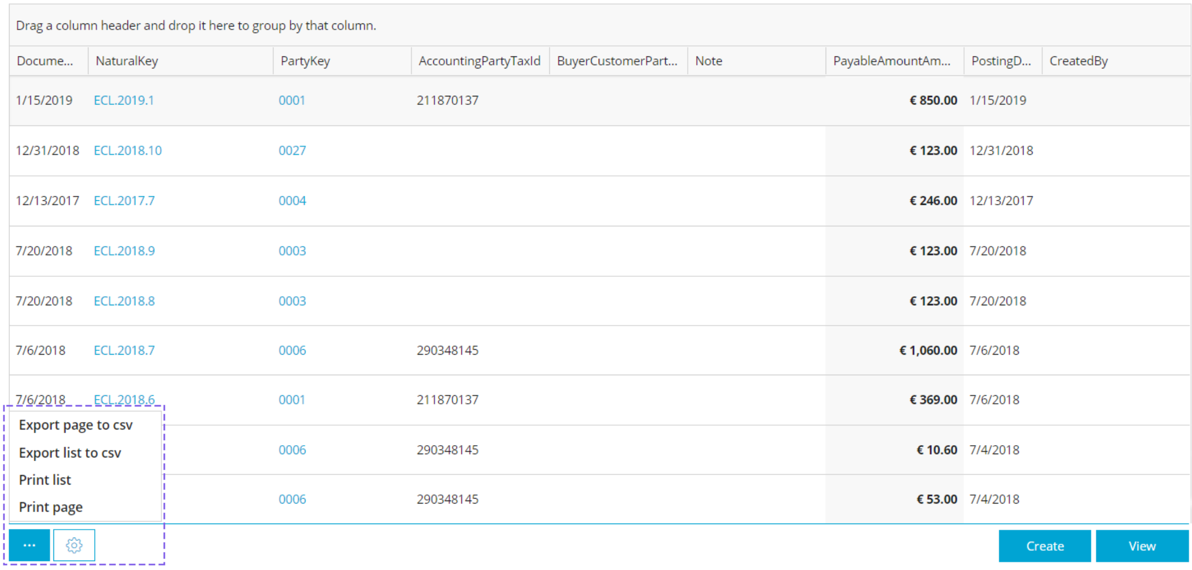


Image 42

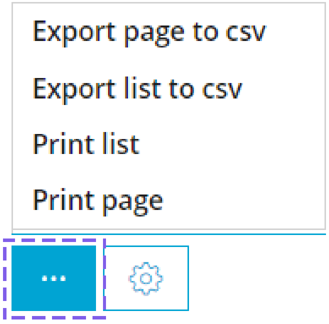
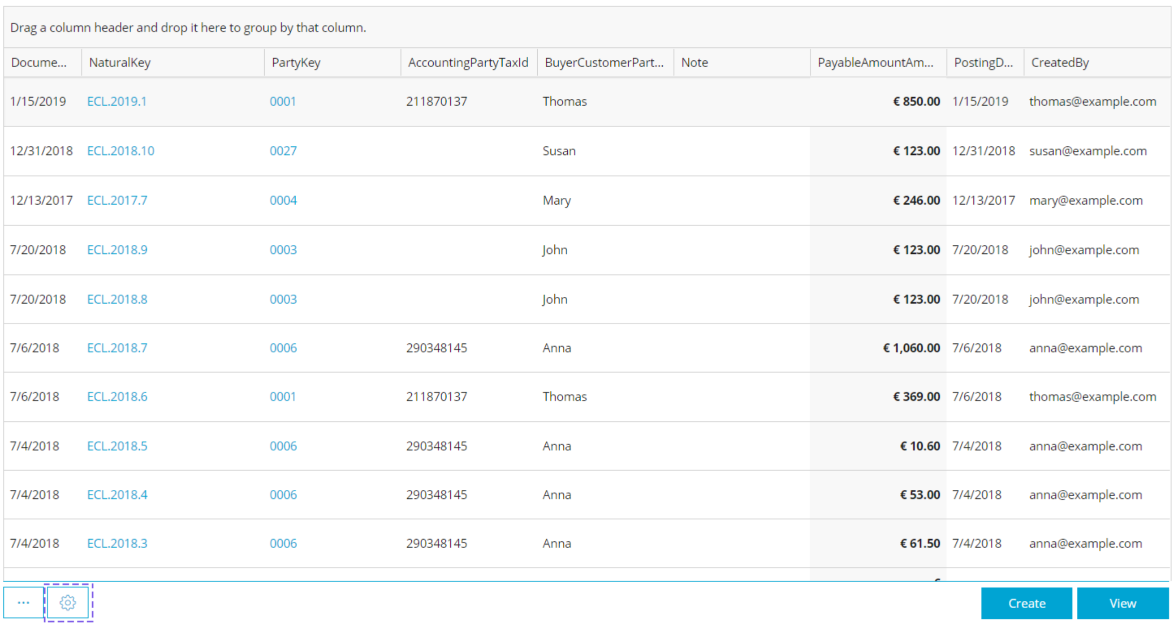


Image 43

- **Configuring lists −** Jasmin allows you to configure how the list is displayed.



Docume...	NaturalKey	PartyKey	AccountingPartyTaxId	BuyerCustomerPart...	Note	PayableAmountAm...	PostingD...	CreatedBy
1/15/2019	ECL.2019.1	0001	211870137	Thomas		€ 850.00	1/15/2019	thomas@example.com
12/31/2018	ECL.2018.10	0027		Susan		€ 123.00	12/31/2018	susan@example.com
12/13/2017	ECL.2017.7	0004		Mary		€ 246.00	12/13/2017	mary@example.com
7/20/2018	ECL.2018.9	0003		John		€ 123.00	7/20/2018	john@example.com
7/20/2018	ECL.2018.8	0003		John		€ 123.00	7/20/2018	john@example.com
7/6/2018	ECL.2018.7	0006	290348145	Anna		€ 1,060.00	7/6/2018	anna@example.com
7/6/2018	ECL.2018.6	0001	211870137	Thomas		€ 369.00	7/6/2018	thomas@example.com
7/4/2018	ECL.2018.5	0006	290348145	Anna		€ 10.60	7/4/2018	anna@example.com
7/4/2018	ECL.2018.4	0006	290348145	Anna		€ 53.00	7/4/2018	anna@example.com
7/4/2018	ECL.2018.3	0006	290348145	Anna		€ 61.50	7/4/2018	anna@example.com

Image 44

Image 45

You can specify which columns to display by adding or removing, sorting and grouping columns according to your needs.

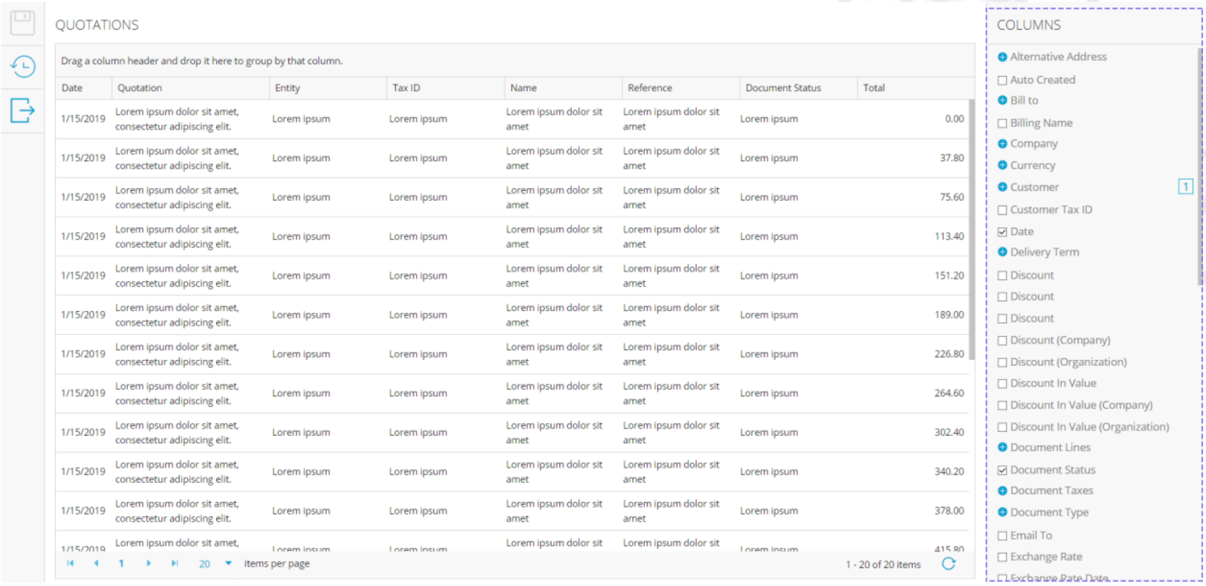


Image 46

You can also rename the columns you choose to display.

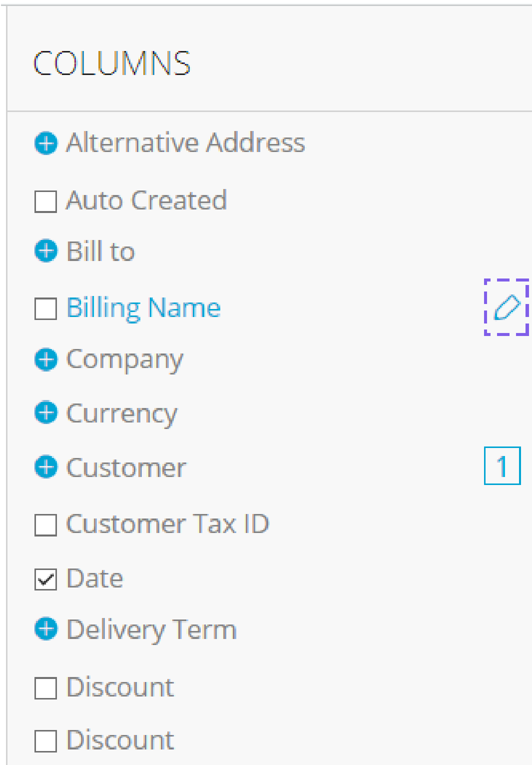


Image 47

Saving this configuration will make changes to this list permanent for following sessions, which means that any time you access this list, it will display your configurations.

You can always reset factory settings at any moment.

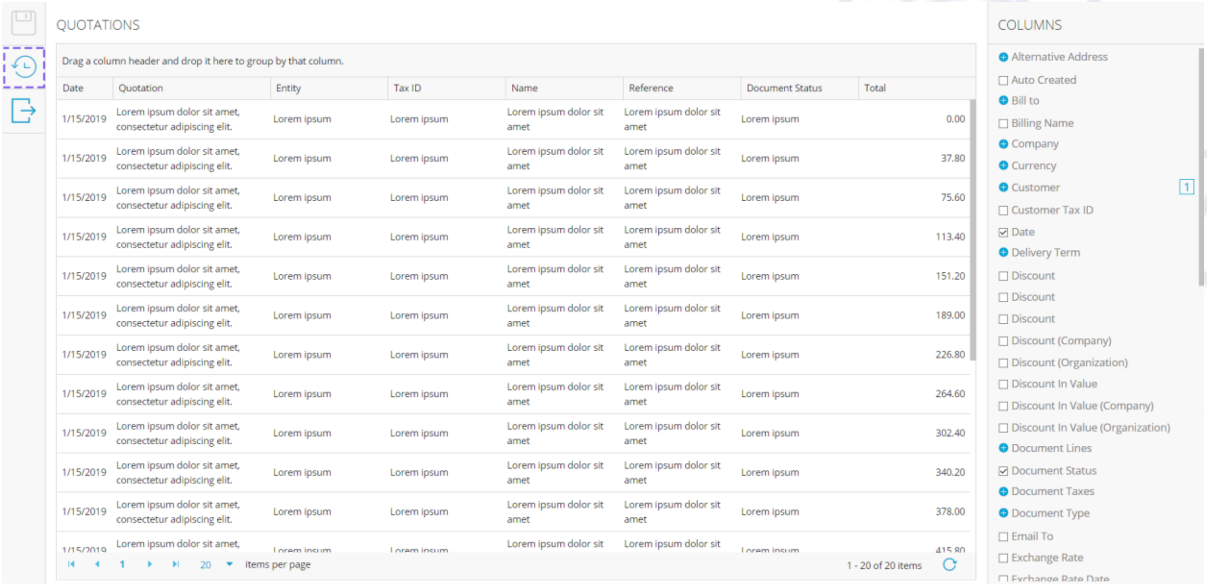


Image 48

Please note that this configuration will only be available for customizable lists and visible for the user who changed them.

- **Creating records** − you can create entity records from an entity's record list page. Clicking the **Create** button at the bottom of the page will display a page to create a record for the entity list.

10. Entering records

Jasmin allows you to enter simple records and key fields. It also allows you to add images by uploading pictures you take using capturing devices such as a webcam or your smartphone camera. Data can be entered using text editors, directly into tables and using sequential records.

Simple fields – these fields can be used for entering text, numbers, percent values, dates, email addresses, telephone numbers, hyperlinks, quantities and money amounts.

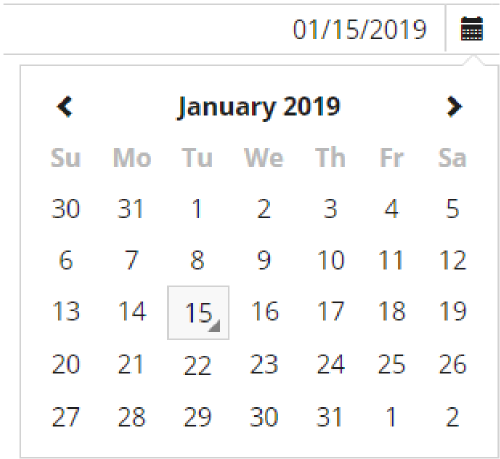


Image 49

Keyword search – these fields allow you to enter a full or partial name and get automatic search results, which means the system will suggest or complete your word with an autocomplete feature. You can access the list of possible values (by clicking the menu), drill down into the base record or create a record directly. After entering the value, the field will displays a code and description.

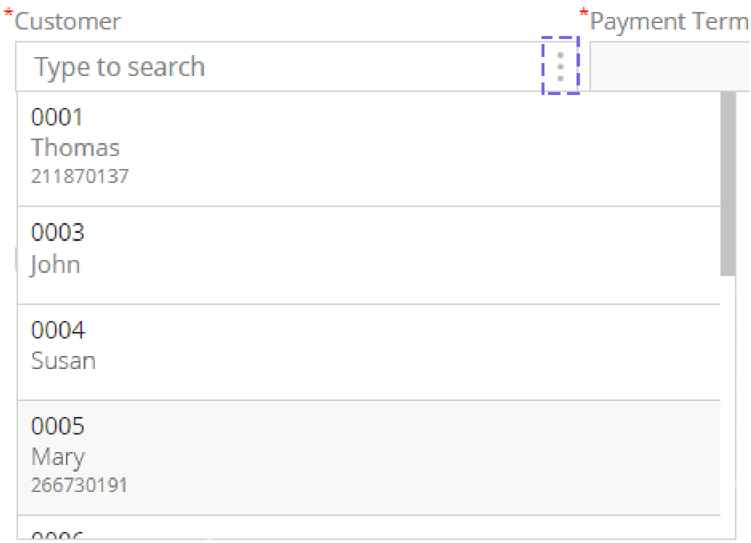


Image 50

Grid – to enter records into a grid, select the row and enter the required fields. You can also use the '**+**' button on the bottom left of the grid.

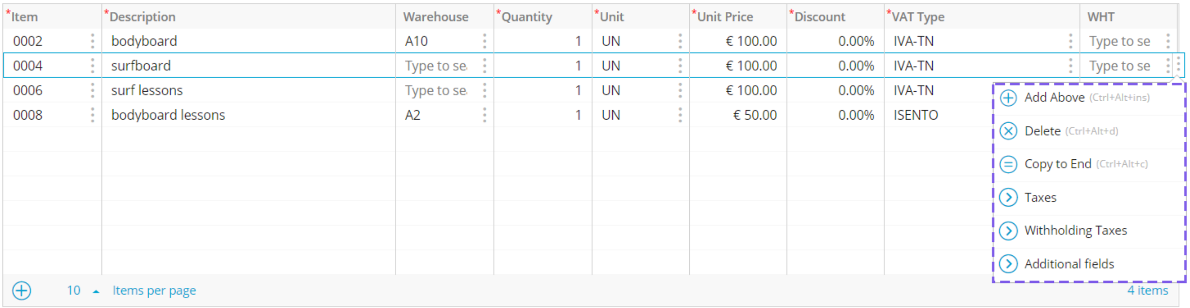


Image 51

Some actions are available for all tables, such as **Add Above**, **Delete** or **Copy to End**. You can also choose the number of lines displayed in the grid or access additional information fields in a pop-up window using the corresponding option.

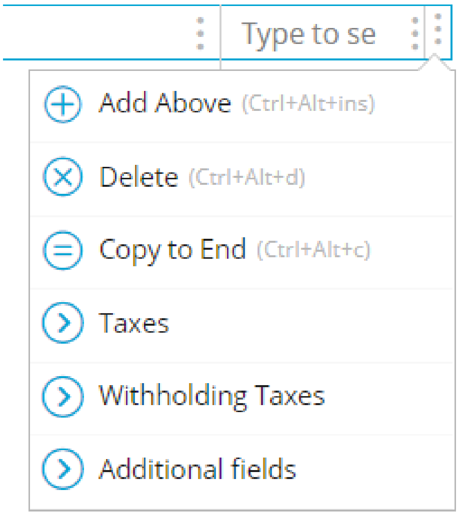


Image 52

11. Creating records when creating or editing another record

In Jasmin, you can create new records while creating or editing a different record with **inline editing**. This means that you can, for example, create the customer you want to use in the sales order you are currently creating without losing you current data.

To do this, simply access the options you want to create (in this case, the customer) and click **Create**:

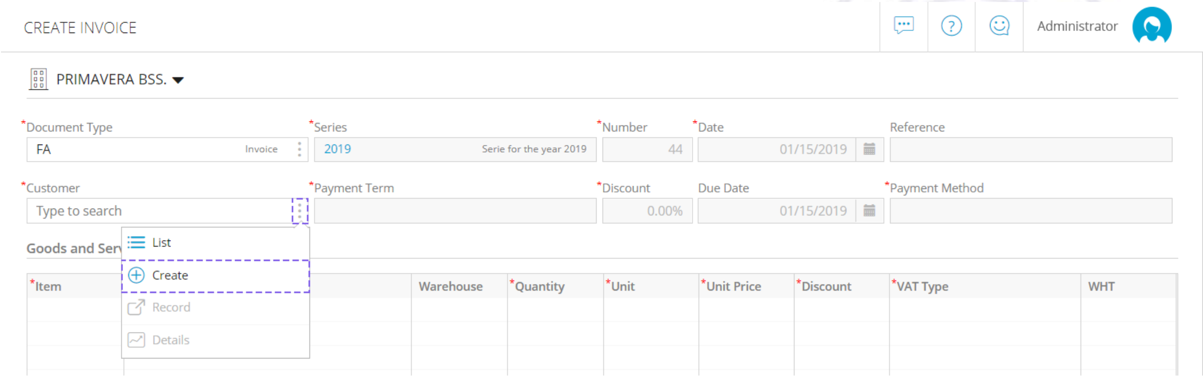


Image 53 – Create a customer from the order creation page

When you click this option, you will be redirected to the page where you can create this record:

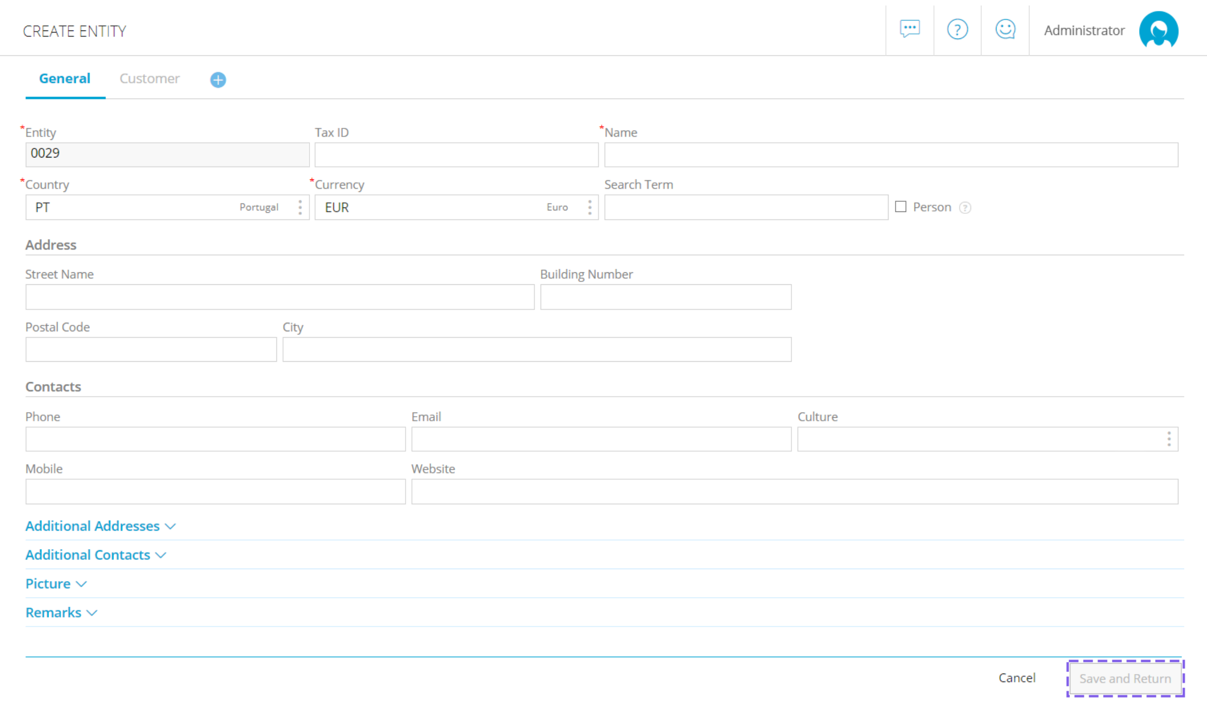


Image 54 – Customer creation page

When you create a record with this method, the **Save** button on the record creation screen is replaced by a **Save and Return** option, as can be seen in the following image. This field will be enabled after entering the required fields for creating a record and you can use it to return to the original record. The customer field will have been filled in with the newly created record:

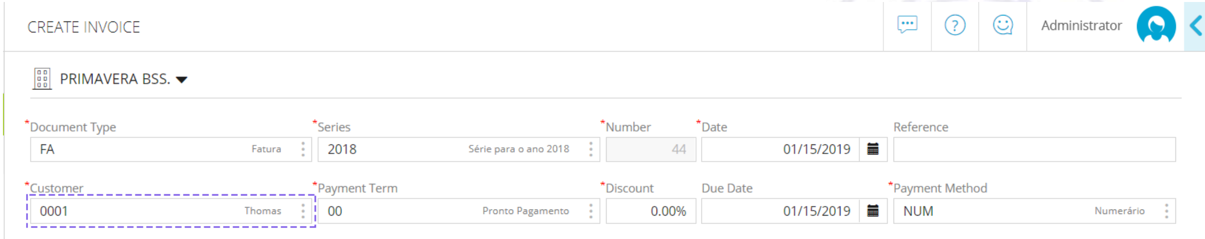


Image 55 – Order creation page after creating a customer with inline editing

12. Printing documents

You can use the Print option to print documents.

Document printing will open a new window with a preview of the form. Selecting the print button will create a digital copy of the document and display it using the browser's PDF reader. You can print this document again to access your printer to make a physical copy of the generated PDF.

Please note that some browsers may not allow pop-up windows, preventing the PDF document preview from being displayed. In this case you will need to configure your browser to allow pop-up windows.

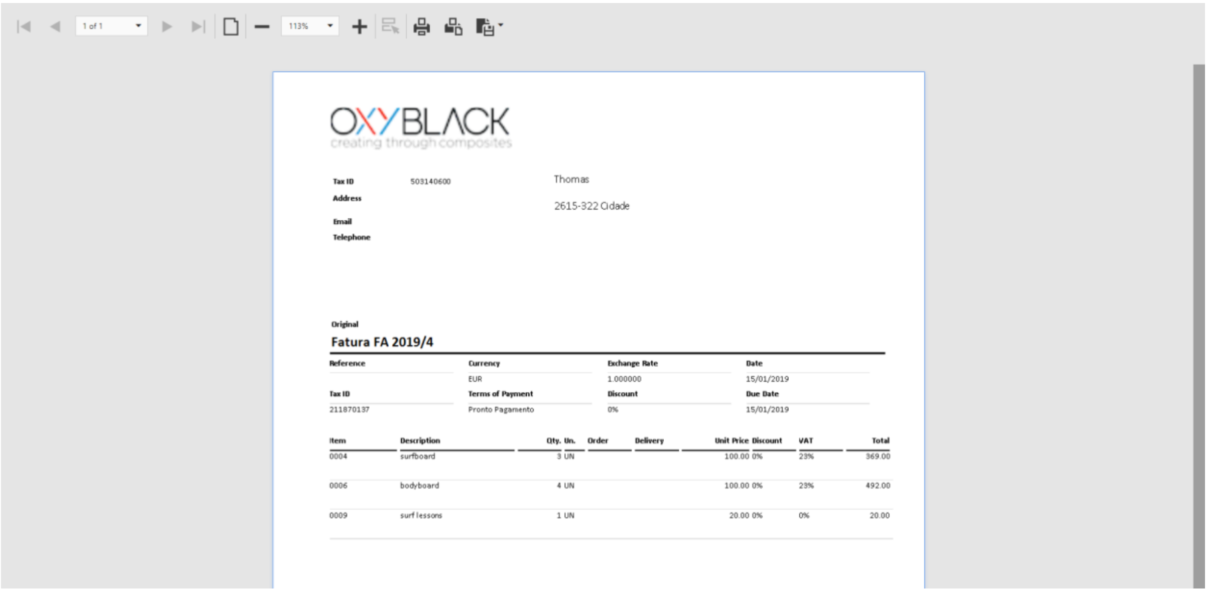


Image 56

Editing printing templates

- **Preset templates**

  The system comes with some preset Template Groups. Each of these groups is associated with 0 or more entities and use default templates that can be viewed from the list of templates.

These models cannot be deleted, but you can customize templates to suit your organization.

- **Entity groups templates**

  There are default configurations for all template groups, which cannot be changed or removed.

  You can add to this list new templates that you create. A default template must be assigned to each group so that they are used for printing documents of the corresponding entity.

- **Customized templates**

  To customize a template you need to access an entity's existing default template. To do this, go to the list of templates, select the desired template and click **View** on the bottom right.

  In the new page, click **Edit** and make the required changes to the preset template.

  The template editing window consists of **4 tabs** and a display area where you can preview the changes you make to the template.

Appearance - Here you can setup the template margins, specify an image to be used as the logo in documents, its size and position.

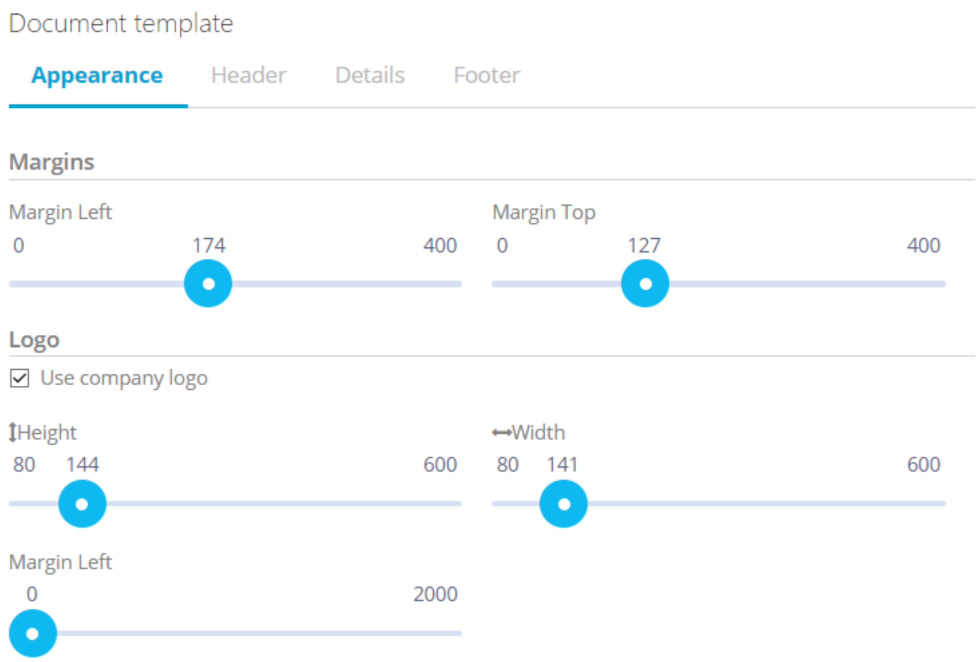


Image 57

For Company-dependent entities, you can setup templates to use the logo defined in the company file in printing. To do it, simply check the **Use company logo** checkbox.

The image upload area disappears automatically when you check this box. If this option is enabled but the company file does not have a logo, the print will not include a logo.

Header - In this tab you can change the margins, size, color and font used in the document header.

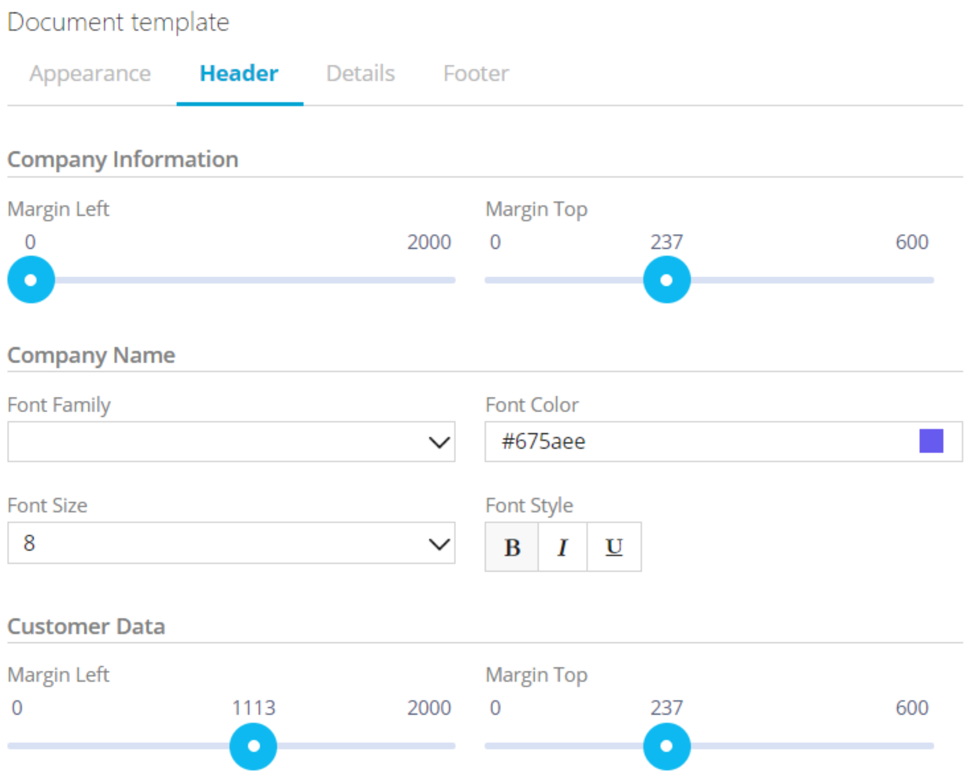


Image 58

Details - Here you can change the settings for the body of the document. You can change the top margin, size, color and font, as well as the text alignment.

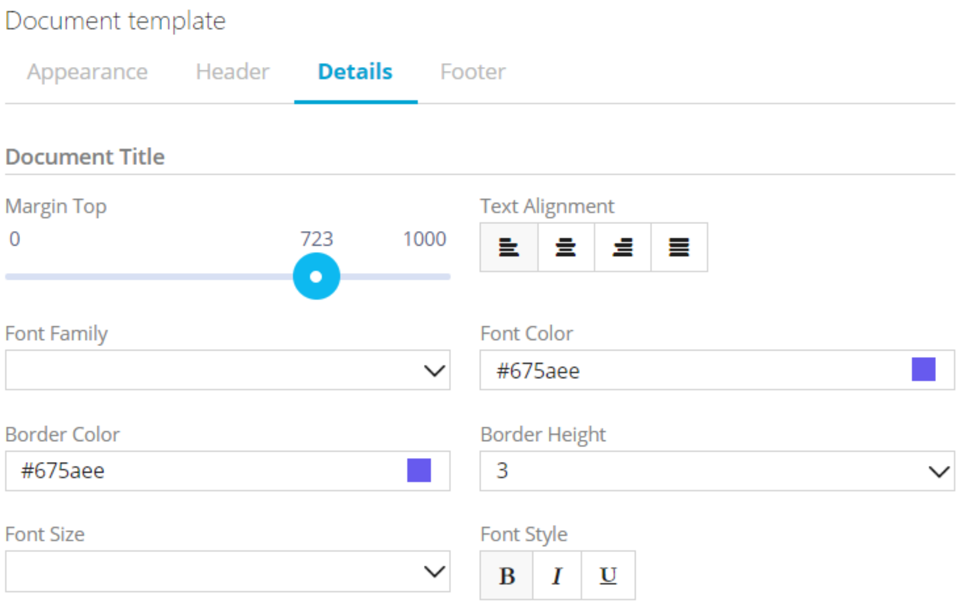


Image 59

Footer - In this section you can enter texts that you want to be displayed in the two lines of the document's footer and specify how they will be aligned.

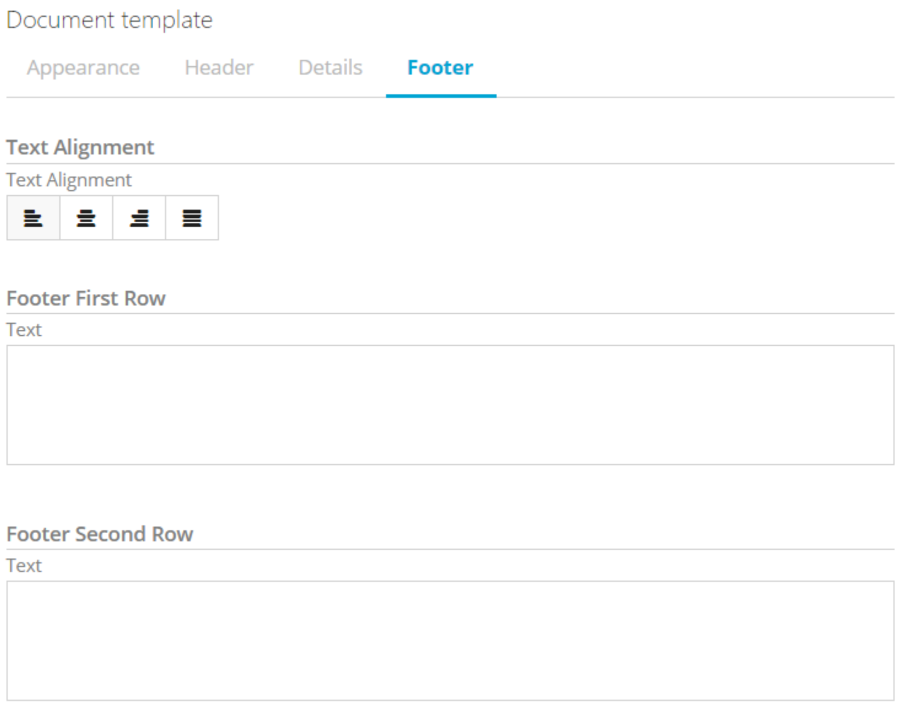
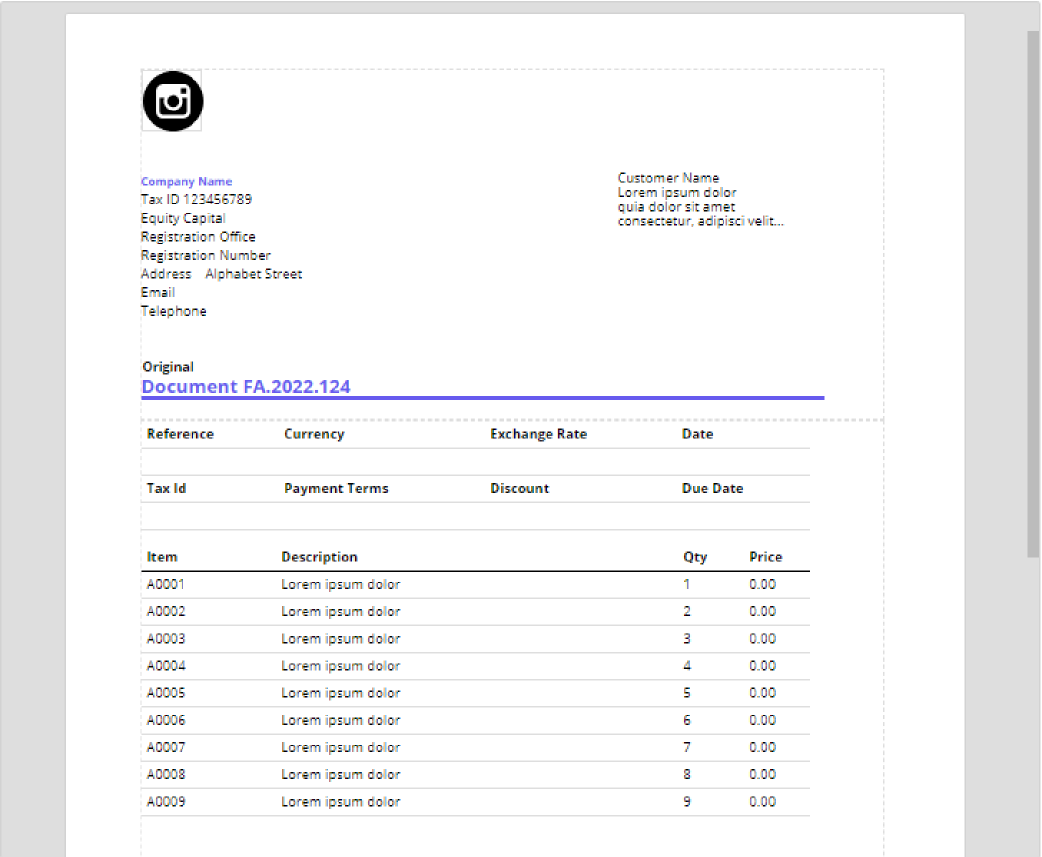


Image 60

2. **Preview area**
Here you can verify how your changes will be implemented in the document.


Company Name
Tax ID 123456789
Equity Capital
Registration Office
Registration Number
Address Alphabet Street
Email
Telephone

Customer Name
Lorem ipsum dolor
quia dolor sit amet
consectetur, adipisci velit...

Original
Document FA.2022.124

Reference	Currency	Exchange Rate	Date
Tax Id	Payment Terms	Discount	Due Date

Item	Description	Qty	Price
A0001	Lorem ipsum dolor	1	0.00
A0002	Lorem ipsum dolor	2	0.00
A0003	Lorem ipsum dolor	3	0.00
A0004	Lorem ipsum dolor	4	0.00
A0005	Lorem ipsum dolor	5	0.00
A0006	Lorem ipsum dolor	6	0.00
A0007	Lorem ipsum dolor	7	0.00
A0008	Lorem ipsum dolor	8	0.00
A0009	Lorem ipsum dolor	9	0.00

Image 61

For more information, go to Setting up printing templates.

First print

When you print a document for the first time, a new browser tab will open the Report Viewer, which will display the document using the printing template configured.

You can then save the document in .PDF file format for future reference or print a physical copy.

Document reprinting

If you require, you can print documents again to create **Duplicate Copies** of the first document you created.

13. Sending documents and templates electronically

Jasmin encourages you to send digital documents via email instead of printing physical copies.

The simplest way to achieve this is clicking **Save and Send** and Jasmin will open a new window with the email that will be sent. If there is an email address in the entity's file, it will be suggested automatically.

You can customize the content of outgoing emails by using **email templates**.

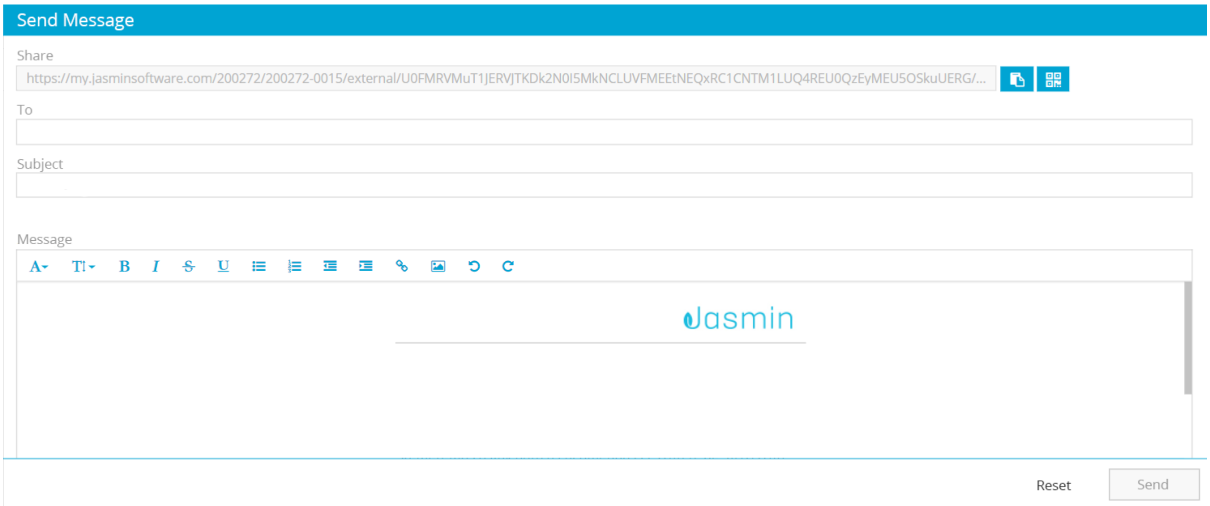


Image 62

You can perform the following actions on email templates:

- Use a **Default template**

  There is a default email template that can be used when to send an email through the application.

  This template cannot be removed.

  However, you can create other templates for your organization if you wish.

- **Creating templates**

  To create a new template, go to the list of templates and click **Create**.

  The system will open a new window for creating the email template. Here you can specify the name and a description for the template, to which the language and culture it will apply, the type of format, subject, and the text contained in the body of the email.

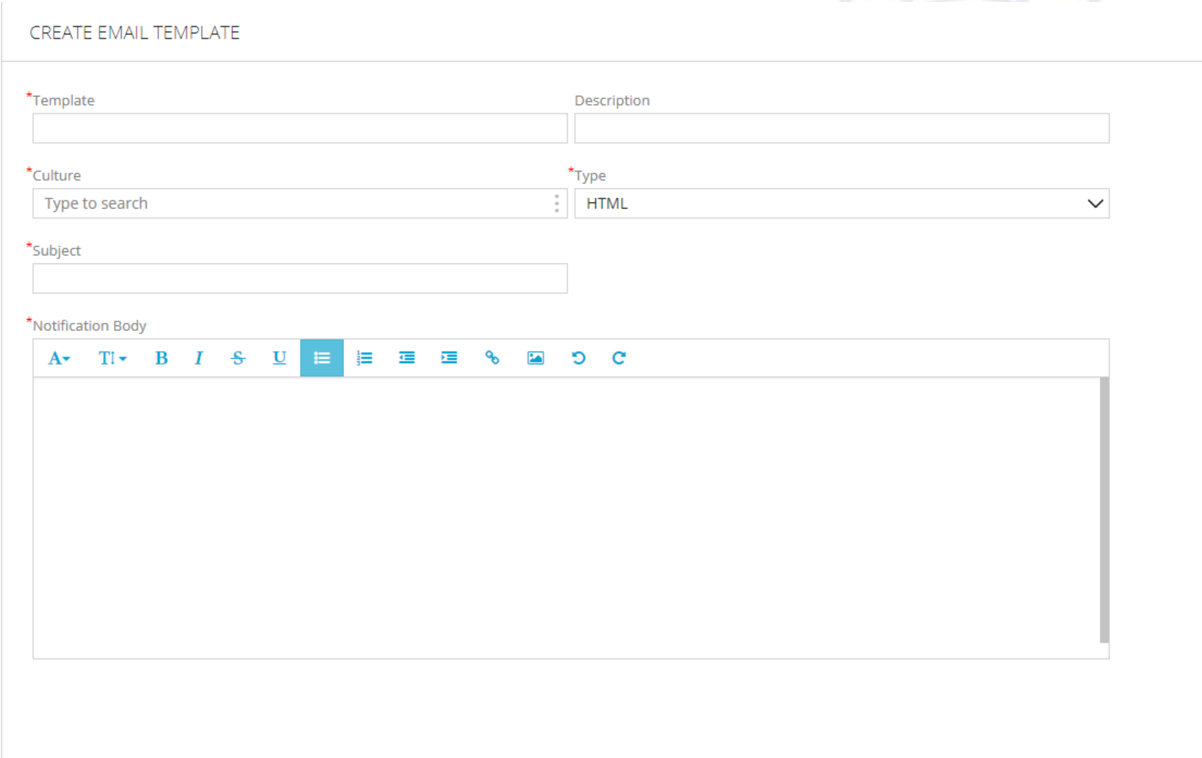


Image 63

- **Configuring the usage of email templates**

  After creating the email template, you need to define where it will be used. To do this, follow these 2 steps:

  1. Define a notification to be associated with the email, use a descriptive name that helps you identify your template, such as "InvoiceEmail". You can associate the new template with an existing notification or create a new one.

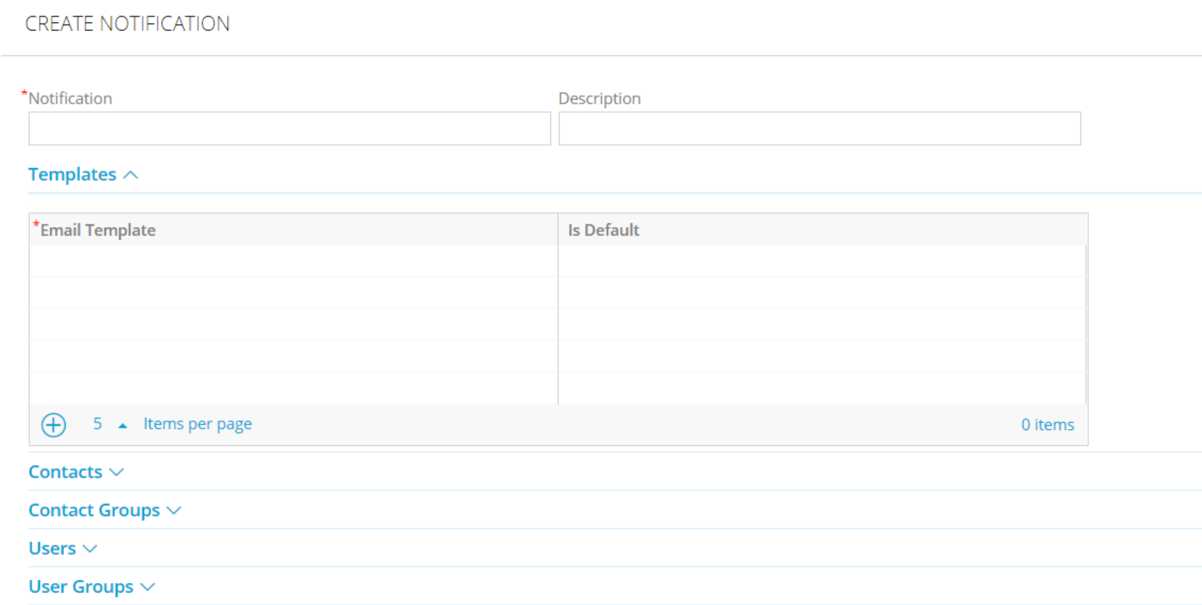


Image 64

Here you can define the contacts or groups of contacts to whom this email template will be sent, and for which users or groups of users it is available.

2. Associate the notification with the type of document for which you want it to be used. In our scenario, the email template will be used for sending invoices, therefore you need to specify which type of invoice will use this notification.
   To do this, edit the desired type of document and associate it with the notification you want under the **Email** expander:

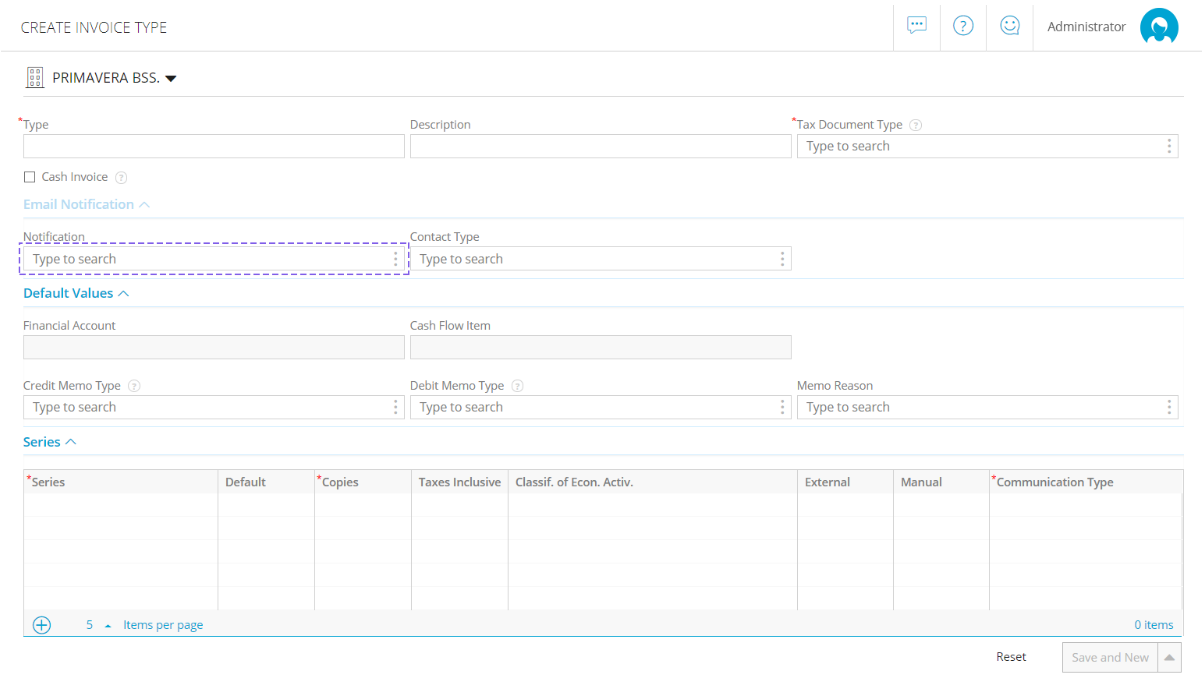


Image 65

Now, whenever you create a new FA type invoice and select to send it via email, the email sending window will use the specified template:

Image 66

For more information, you can read the General FAQs on the Jasmin Help Center.

14. Help

Jasmin provides you with several types of help information:

- Application help
- Tooltips
- Chat
- Support requests
- Help Center

Application help can be accessed from every screen of the application.

To access explanations on common screen interactions, click the **Help** button and select the **Quick Guide** option from the starting page.

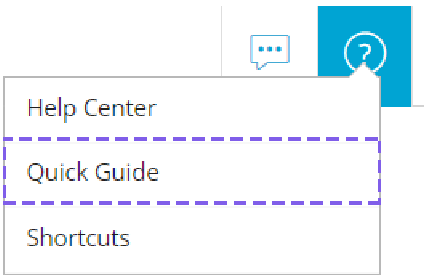


Image 67

The system will display several “coach marks” in the form of help steps that you can follow to understand how to interact with the application. Click the **>** to move to the next step or click the **X** to close the coach marks.

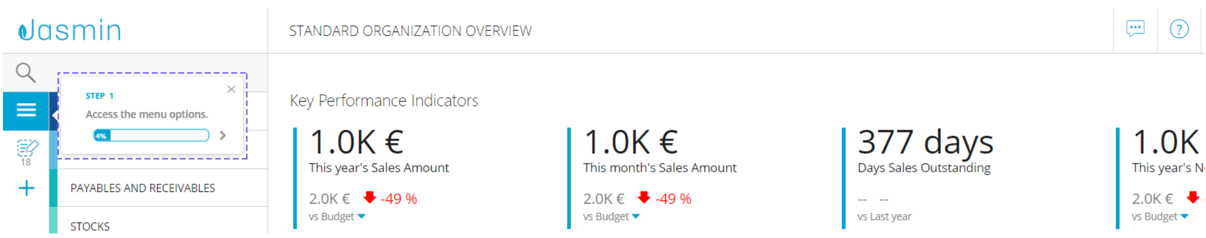


Image 68

When you enter a screen for the first time, the system will also show you some coach marks for that screen.
Some action buttons include **Tooltips** to make it easier to understand how they work when you hover over the button. There are also **Hints** on some options that explain some of the more complicated concepts or rules for working with the software.

Image 69

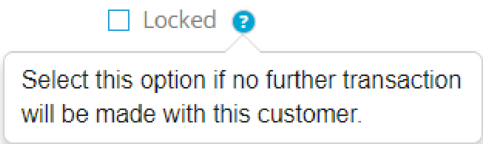


Image 70

The **Chat** is a communication tool that allows you to clear your doubts in real time. To open a conversation window and question someone on the Jasmin support team regarding the software, click the button on the upper right corner .

You can also create support request tickets for the support team without leaving Jasmin. To do this, access your **Personal Area** and select **Support Request**.

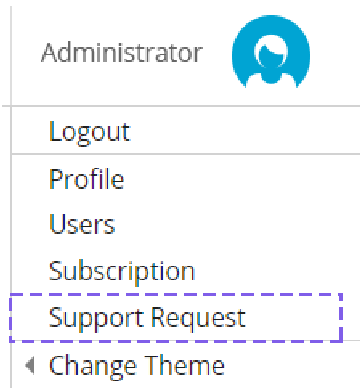


Image 71

If you still have some questions or simply want to learn more about Jasmin, you can access the **Jasmin Help Center**.

To do this, click the **Help** button ? and select **Help Center**.

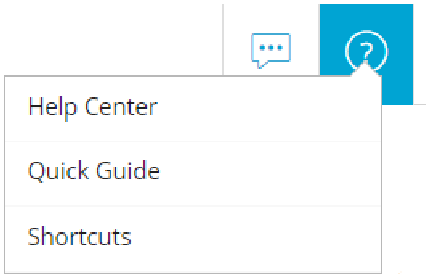


Image 72

Jasmin Help Center is divided into the following sections:

- **How to use** – where you can access this **Getting Started** guide, a **Glossary** of terms used in the software, along with help articles organized into areas, for example **Purchases**, **Sales**, **Payables and Receivables**, **Stocks** and **Legal and Tax Questions**. Each area also includes a tutorial animation to illustrate a common use scenario of the software;
- **Videos** – where you can see a gallery of simple tutorial videos that explain how to perform common business operations such as creating an invoice, an item or importing your data from a spreadsheet;
- **FAQs** – where you can read answers to some common questions about using Jasmin, divided into areas;
- **Downloads** – where you can get the latest ebooks and guides published by the Jasmin team;
- **Blog** – where you can read up on some interesting topics related to business management, written by the Jasmin team;
  Login – where you can enter your login credentials and enter or return to Jasmin.

You can also use the **search** to find specific contents or use the **chat** feature.

15. Initial Settings

To simplify your tasks and reduce the time you spend initially setting up your system, Jasmin includes many sample lists and settings, such as units of measurement, dimensions, countries, currencies, tax regimes, tax exemption reasons, withholding taxes and types, payment and shipping methods, document types (invoice, simple invoice, invoice receipt, transportation documents), etc... Many settings are generated automatically when you create your company in Jasmin, but there are others you need to define explicitly.

To **create your company** in Jasmin, follow these steps:

- Go to **Setup | General | Companies**;
- Select **Create**;
- Enter the required fields in the **Create Company** form, marked with a red *. When you paid for your Jasmin subscription, you were prompted for some details such as the **Tax ID** and the company name. These details are suggested by Jasmin when you create your company. By using your **Tax ID**, the system will also search the public **VIES** database (**VAT Information Exchange System**) and import all information associated with that tax number, such as the company's headquarters and other company contact details. This means that you will only need to confirm the details automatically entered by the system and fill in any missing fields.
- Please note that fields such as the **Base currency** and **Country** are particularly important because they influence the company and the system's operations.
- It is advisable to upload your company **Logo**, which will be used in printed documents.
- The email address you enter in the **email** field will receive copies of any message sent through the system ("no-reply@primaverabss.com") to customers, suppliers, business partners, etc.
- To save your data, select **Save**.
- When your data is saved, the system will automatically create the necessary configurations for issuing **Sales** and **Purchases** documents. The following **Sales documents** are generated and associated with their operations: quotations, orders, goods issue documents, invoices, credit/debit note. The following **Purchases** documents are also generated: orders, material receipt notifications, invoices, credit/debit notes and payment notes.
- Jasmin will also:
    - Create a default **Warehouse**;

- Create a basic **Financial Account** with some default configurations such as allowing negative balance and not allowing using foreign currencies;
- **Configure taxes applicable to the company**, assuming that transportation and financial documents will be submitted to the governing Tax Authority manually.

Once you confirm that your company details are correct, you need to create **Entities** (customers, suppliers, salespeople or banking institutions) and the **Items** that make up your **Stock** in order to use them for **Purchases** and **Sales** operations. You can create **Items** and **Entities** in whichever order you want because these processes are independent.

To **create an item** follow these steps:

- Go to **Setup** | **Stocks** | **Items**;
- Select **Create**;
- Enter the required fields;
- Specify if the item will be used in **Purchases**, **Sales**, **Stocks** or in **ECommerce** processes by adding the corresponding extension tab with the **+** button at the top of the item page;
- Each extension includes different fields: **Sales** features the price list, **Purchases** focuses on the last purchase document, **Stocks** allows you to see item quantities in each warehouse or assign items to new warehouses and **ECommerce** displays data to be shown in your digital store.
- To save your data, select **Save**.

To **create a customer, supplier, salesperson or financial institution entity**, follow these steps:

- Go to **Setup | CRM | Parties List**;
- Select **Create**;
- Enter the required fields;
- Add the applicable extensions to categorize the entity as a **Customer**, **Supplier**, **Salesperson** or **Financial Institution** and create the necessary relations in the software;
- Fields are different for the different extensions: **Customer** features information like Payment Method and Terms, Delivery Terms, Discounts, VAT Regime or Price List; and while **Supplier** also has some of these fields, it also allows you to specify supplier prices for items. The **Salesperson** extension allows you to specify a percent commission for this seller (%). In the **Financial Institution** tab you can enter the Main SWIFT and the Bank Code.
- To save your data, select **Save**.

Please note: information from entity files will be used in documents, namely the Name, Currency, Address, Tax ID and Email Address fields. Similarly to what happens when you create your company, when you enter the **Tax ID**, the system will search the **VIES** database and import data automatically.

If your entity is a **Customer** or **Supplier**, details will be automatically used in documents.

16. Configuring printing template

Jasmin features a simple configuration of printing templates under **Setup** > **System** > **Templates**.

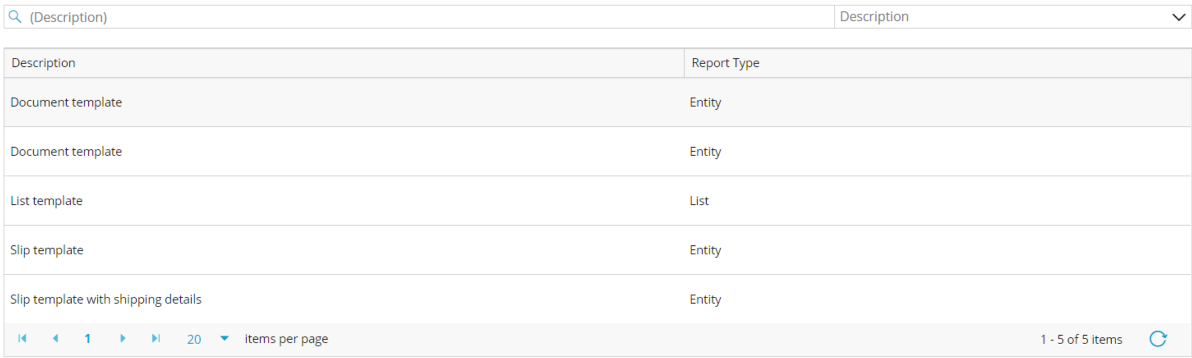


Image 733

To configure a document's printing template select the desired template and click **View**. You will be directed to the template editing page that consists on 4 tabs – **Appearance**, **Header**, **Details** and **Footer**.

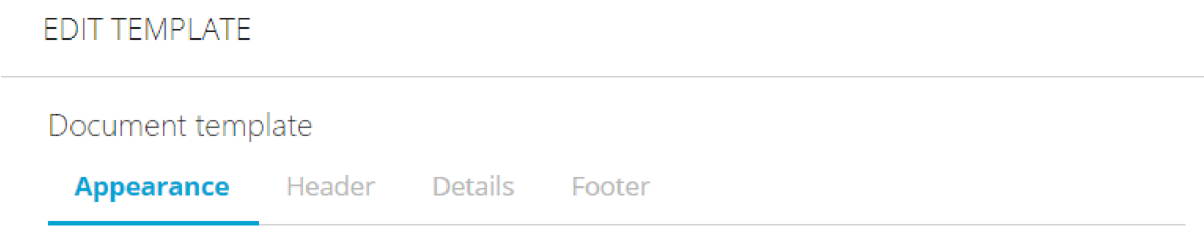


Image 744

The options available change according to the type of document, for example, if you edit a **List Template**, the configurations screen will only include the **Appearance** and **Details** tabs.

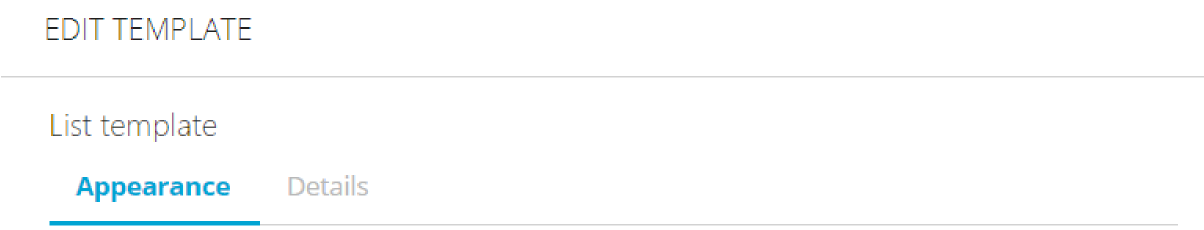


Image 755

In the first tab you can configure the document margins by dragging the pointer and preview your changes on the right. You can also upload and configure the width and height of a new image to be used in the report.

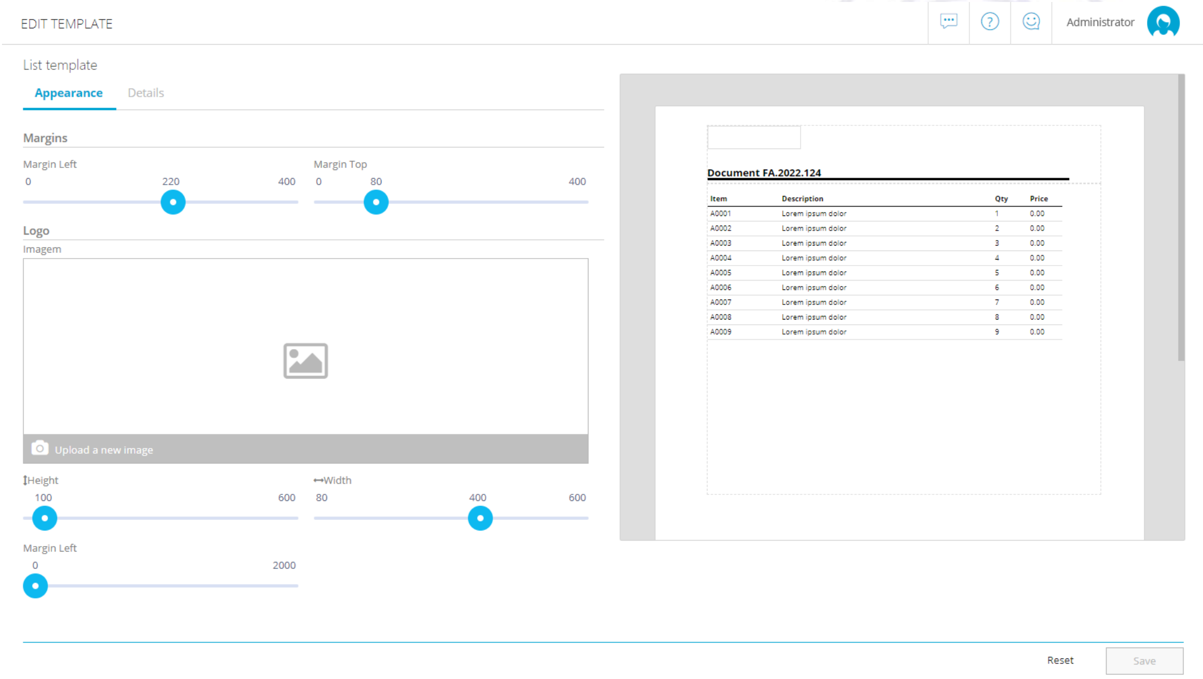


Image 766

The **Details** tab allows you to specify the document title, text alignment, font, style and colors and preview your changes on the right.

Click **Save** to save your changes.

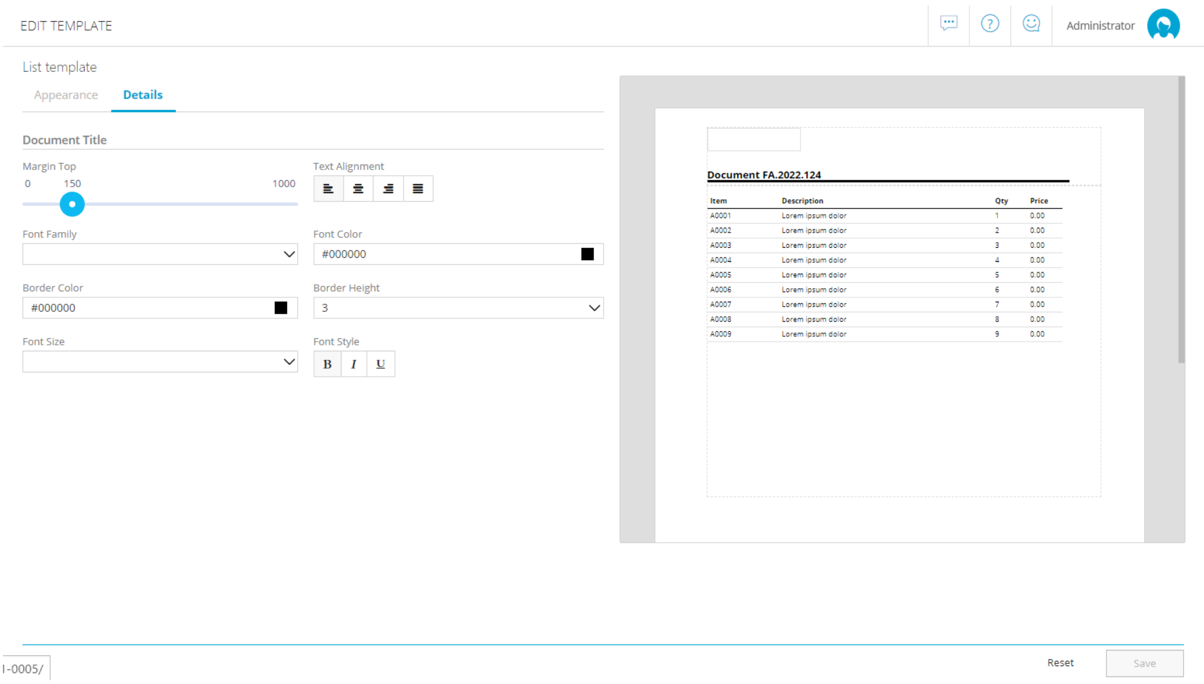


Image 777

17. Management and decision-making support tools

Jasmin includes tools to help you with management and decision-making, namely:

- Budgets
- Expense Reporting
- Profit and Loss Statements

17.1. Creating a budget

An important part of running a business is working with cost and income estimates and being able to track their evolution on a daily basis.

From the dashboard on the homepage you can create a budget which will help you manage the day-to-day operations of your company. Start by selecting **Create budget**.

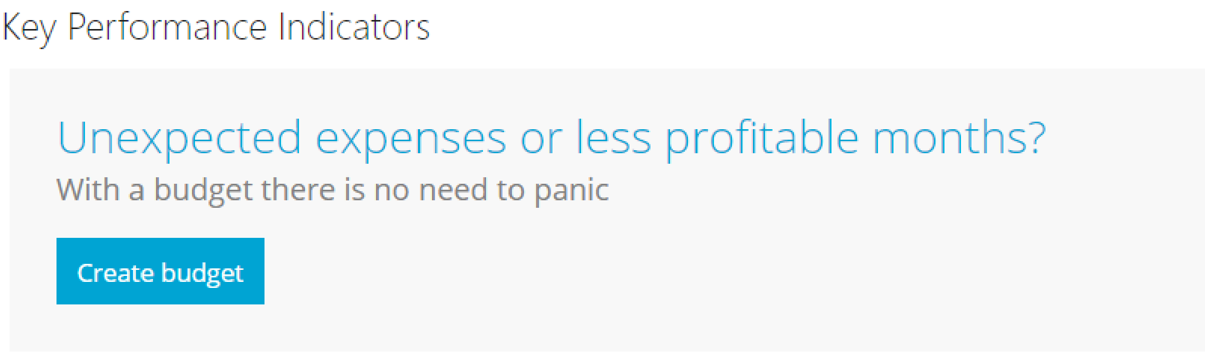


Image 788

You will be redirected to the profit and loss page.

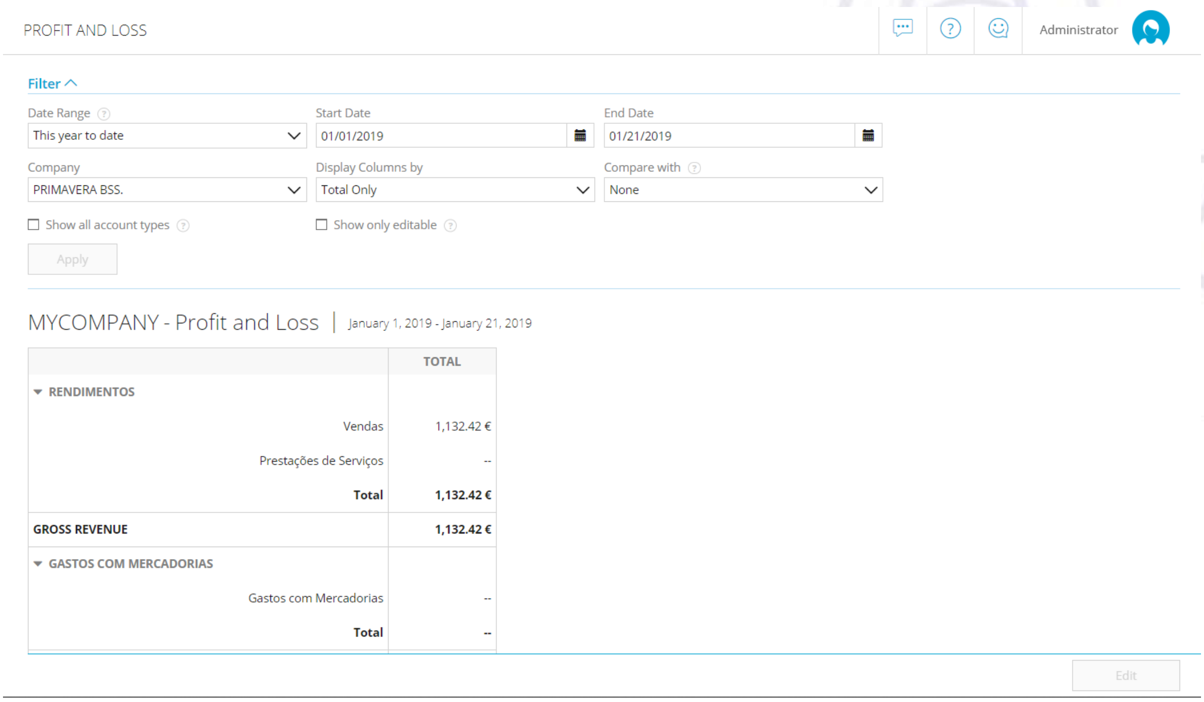


Image 79

On this screen, select the time period covered by the budget. You can define a budget for the ongoing or next year. By selecting **Current Year** or **Next Year**, Jasmin will change the start and end dates of the budget. If you choose any other date range, you will be able to filter your budget by time period.

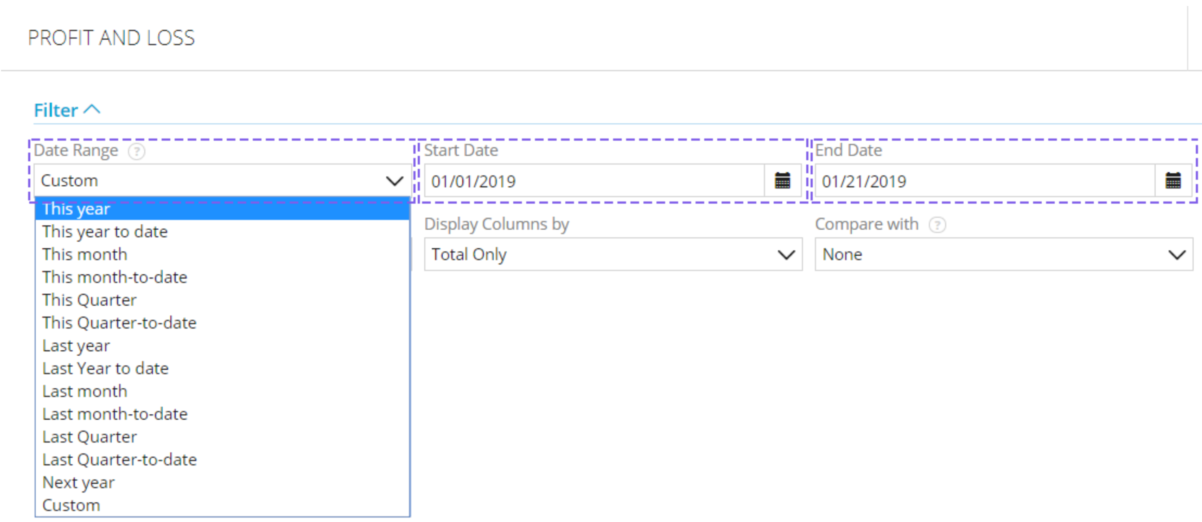


Image 79

Please note that the **Display Columns by** field allows you to choose how to view your budget - either **by totals** or distributed **by months**.

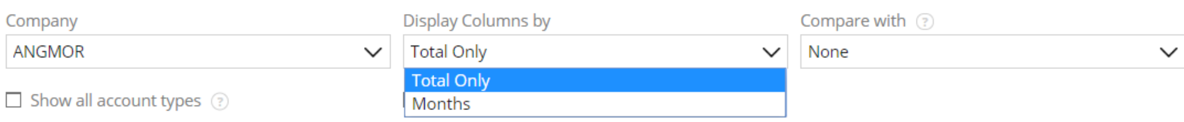


Image 80

The **Compare with** field allows you to compare a real value with a comparison value – a **Budget** or a **Homologous Period**.

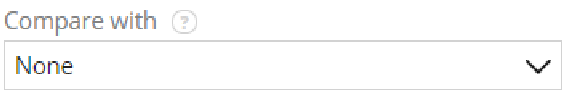


Image 81

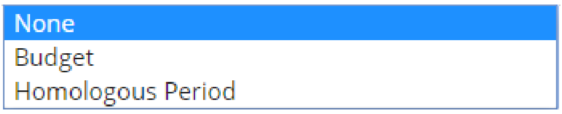


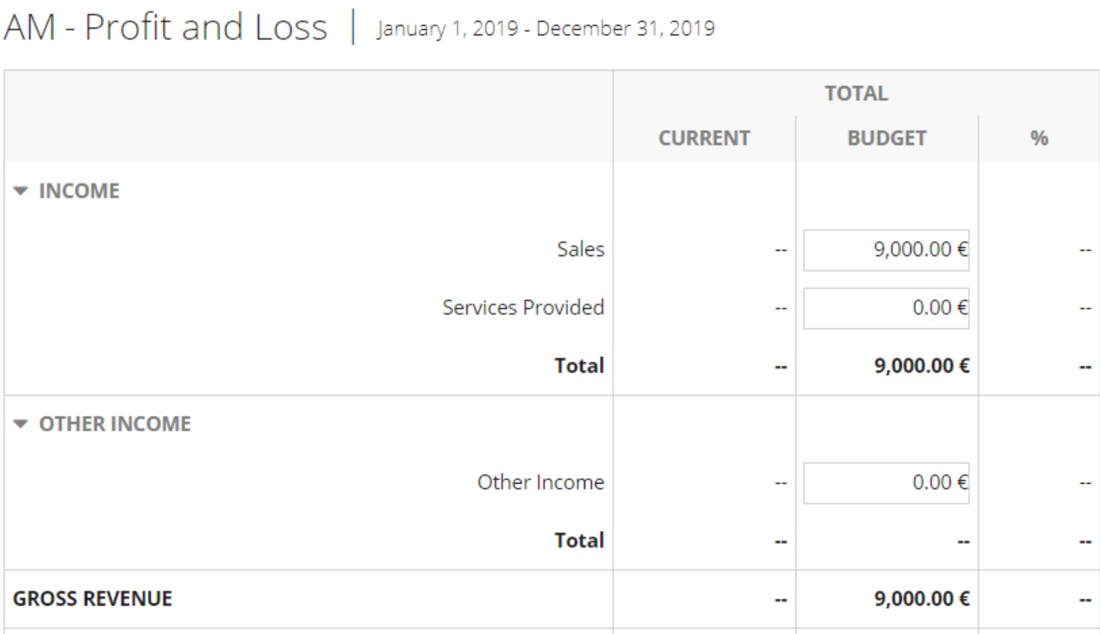
Image 823

You can also choose to display **all** or only **editable items** on your budget by checking the desired option and selecting **Apply**.

Image 834

Then enter your budget data directly in the **Profit and Loss Form**.

Enter the **Sales** and **Service Provision** profit levels you expect to achieve.


AM - Profit and Loss | January 1, 2019 - December 31, 2019

	TOTAL		
	CURRENT	BUDGET	%
INCOME			
Sales	--	9,000.00 €	--
Services Provided	--	0.00 €	--
Total	**--**	**9,000.00 €**	**--**
OTHER INCOME			
Other Income	--	0.00 €	--
Total	**--**	**--**	**--**
GROSS REVENUE	**--**	**9,000.00 €**	**--**

Image 845

If you expect to achieve other types of profit, for example, from sales of vehicles or by renting your property, enter them in the **Other Income**.

	TOTAL		
	CURRENT	BUDGET	%
INCOME			
Sales	--	9,000.00 €	--
Services Provided	--	0.00 €	--
Total	**--**	**9,000.00 €**	**--**
OTHER INCOME			
Other Income	--	0.00	--
Total	**--**	**--**	**--**

Image 856

Specify how much you expect to spend on goods.

MARKET EXPENSES			
Merchandise Expenses	--	0.00	--
Total	**--**	**--**	**--**

Image 867

You can also enter how much you expect to spend in general expenses. Please note that when you enter expenses, these will move to the **General Expenses** area, if correctly categorized. You may not be able to anticipate your utilities expenses or spending on vehicles, but, for example, if you do not have your own property, you can calculate your yearly rent and enter this value in the budget.

GENERAL EXPENSES			
Advertising and Marketing	--	0.00 €	--
Fees and Commissions	--	0.00 €	--
Tools and Utensils	--	0.00 €	--
Office Supplies	--	0.00 €	--
Water, Electricity and Gas	--	0.00 €	--
Travel and Stays	--	0.00 €	--
Incomes and Rents	--	0.00 €	--
Communication	--	0.00 €	--
Representation Costs	--	0.00 €	--
Vehicle Expenses	--	0.00 €	--
Other Expenses	--	0.00 €	--
Total	**--**	**--**	**--**

Image 87

The same applies to **Staff Expenses**, where you can enter the amount you expect to spend on salaries in that year.

STAFF EXPENSES			
Remuneration	--	0.00 €	--
Charges	--	0.00 €	--
Total	**--**	**--**	**--**

Image 888

Other Expenses may include, for example **Depreciation** or **Taxes**.

OTHER EXPENSES			
Depreciation	--	0.00 €	--
Taxes	--	0.00 €	--
Other Expenses	--	0.00 €	--
Total	--	--	--
GROSS LOSS	**8.13 €**	--	--
NET PROFIT	**-8.13 €**	**9,000.00 €**	--

Image 89

Then select **Save** to save your information.

Image 90

Please note that after saving the budget:

- The **Gross Expenses** and **Net Profits** will be updated in the budget;
- You can edit the budget at any time by selecting the **Edit** option;
- The **Create Budget** option will no longer be available from the *Dashboard*, and it will be replaced with **Key Performance Indicators (KPI)**. These will allow you to compare your company's real evolution against the budgeted figures.

17.2. Reporting expenses

For there to be a correct profit and loss report, which is critical for running a business, all expenses need to be recorded when they happen.

To report an expense, follow these steps:

- Go to **Expenses | Expenses**;
- Select **Create**;
- You will be shown the **Create Expense** form;

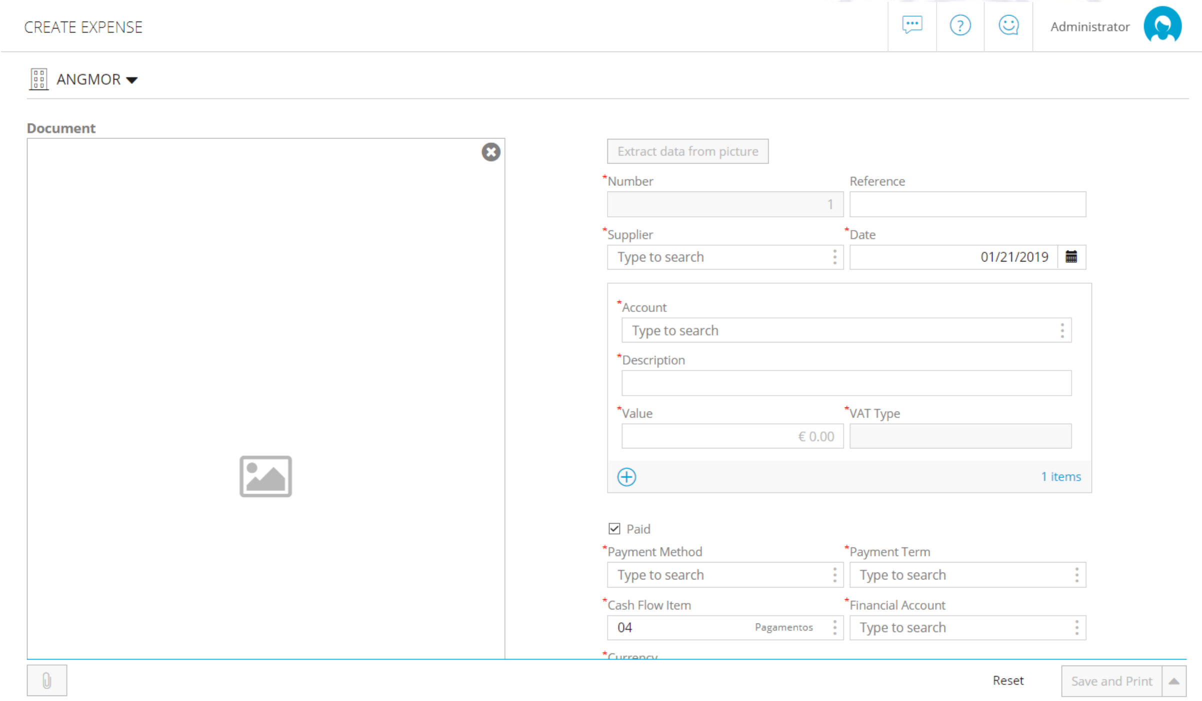


Image 91

- Please note that you can report expenses from a specific supplier and into an associated account − item and or cash flow item.

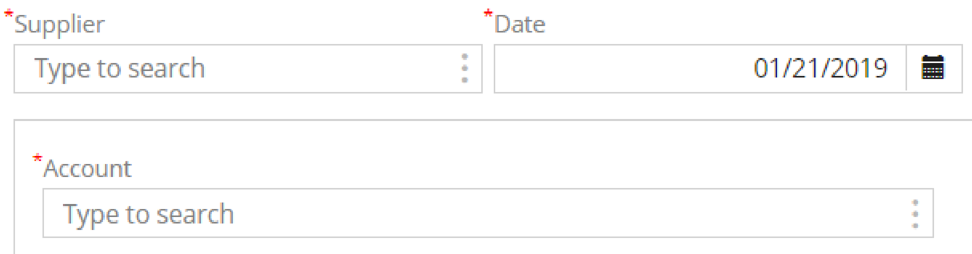


Image 923

- Enter the **Supplier** field by accessing the suppliers list and selecting one.

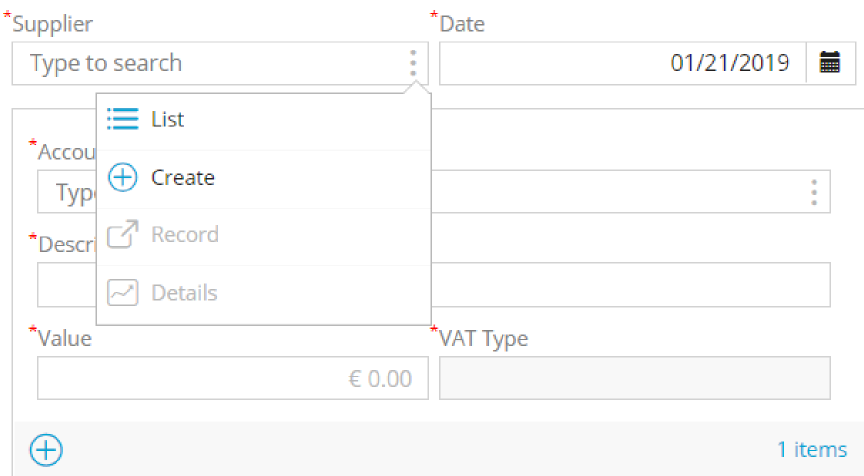


Image 93

- Once you select your supplier, click **Select**.

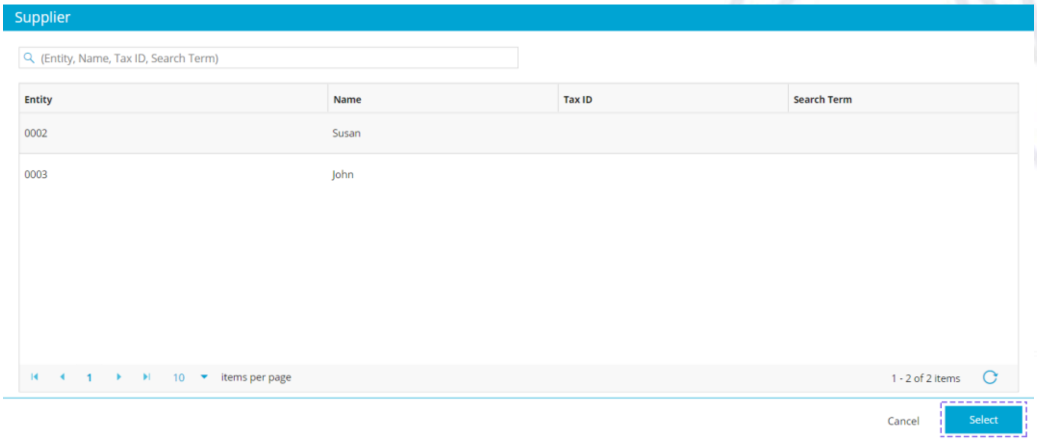


Image 94

- Data associated with this supplier, such as the payment method and terms, will be entered in the form automatically.

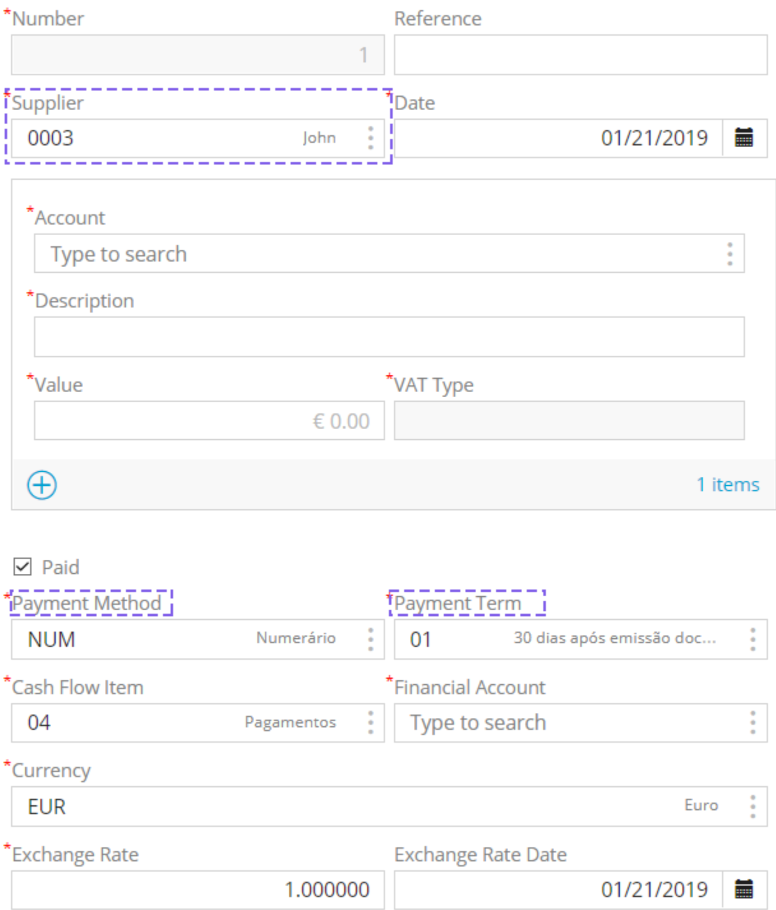


Image 95

- When you create an expense, please fill in the **Accounts** field that lists items with which you want to associate the expense. Filling in this field correctly is important because it will impact the **Profit and Loss Report**. To do it, select the **List** option.

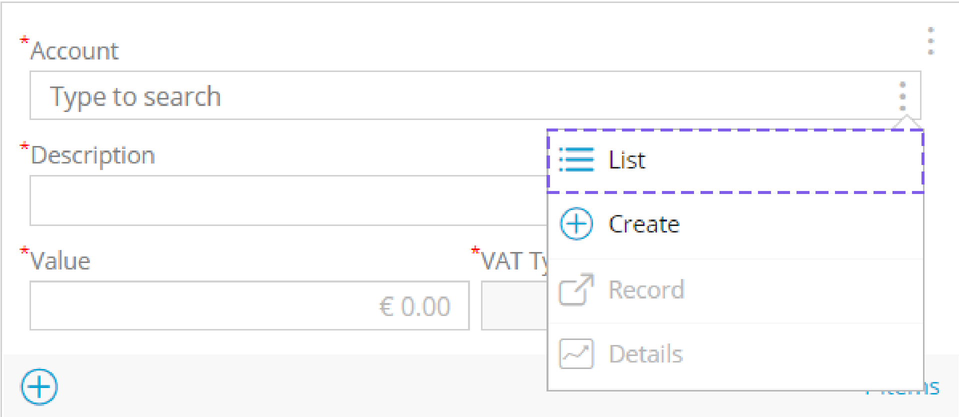


Image 96

- Select the expense item from the pop-up window displayed − in this case, **Goods Expenses** – and confirm it with the **Select** option.

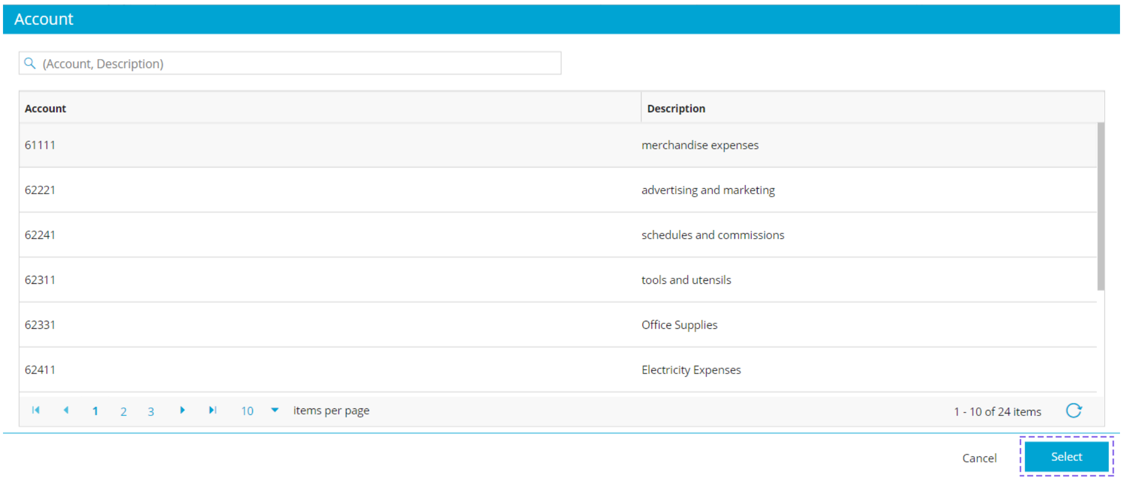


Image 97

- Corresponding fields will be updated automatically. Enter the desired value in the **Value** field. If you want to enter another expense, click the **Add** button (**+**).

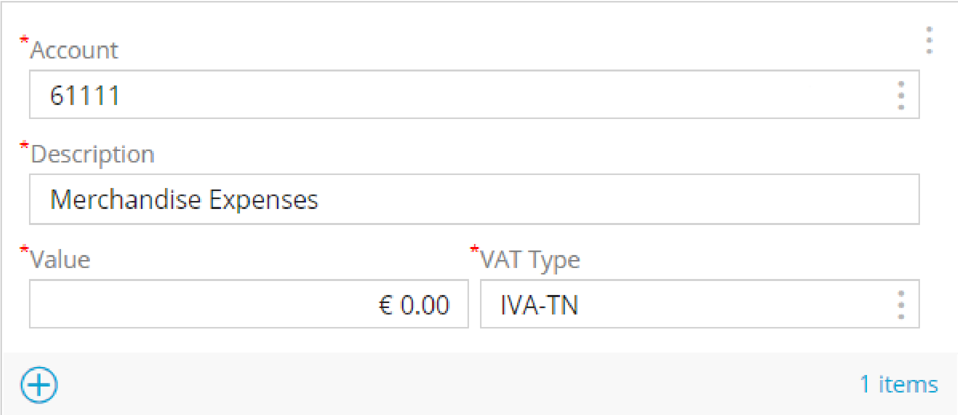


Image 99

- Fill the **Cash Flow Item** and **Financial Account** fields to finish the expense report. Select the applicable cash flow item from the **List**.

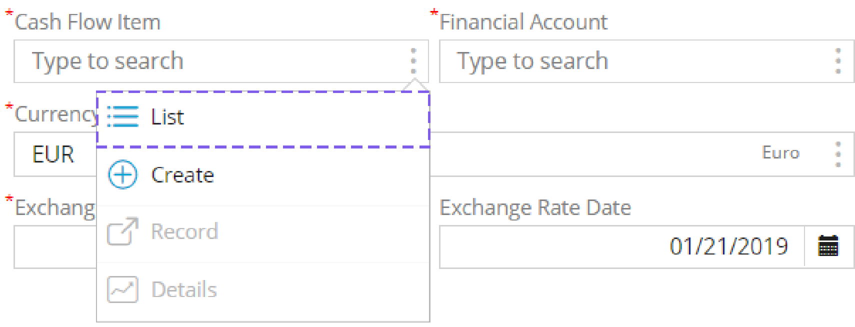


Image 98

- In this example, select cash flow item **04**.

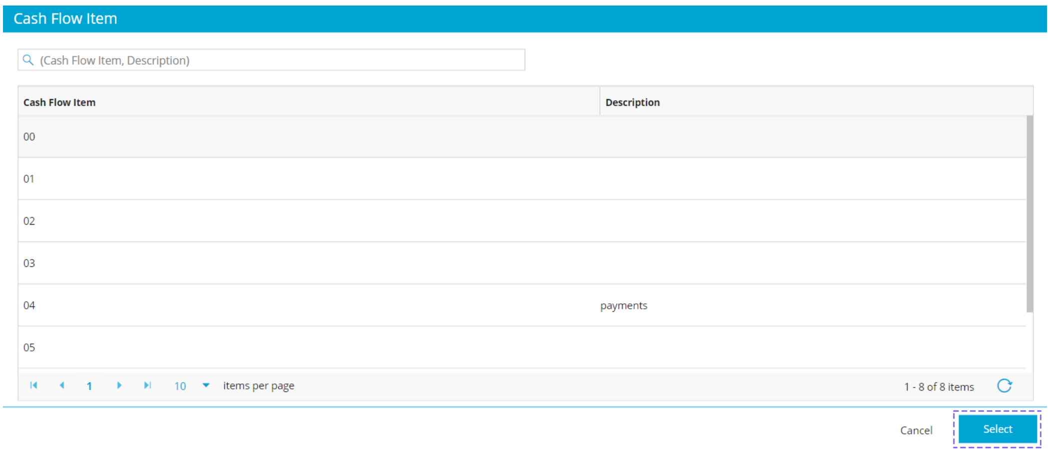


Image 99

- Information will be updated. Now, you can create the financial account record by selecting **Create**.

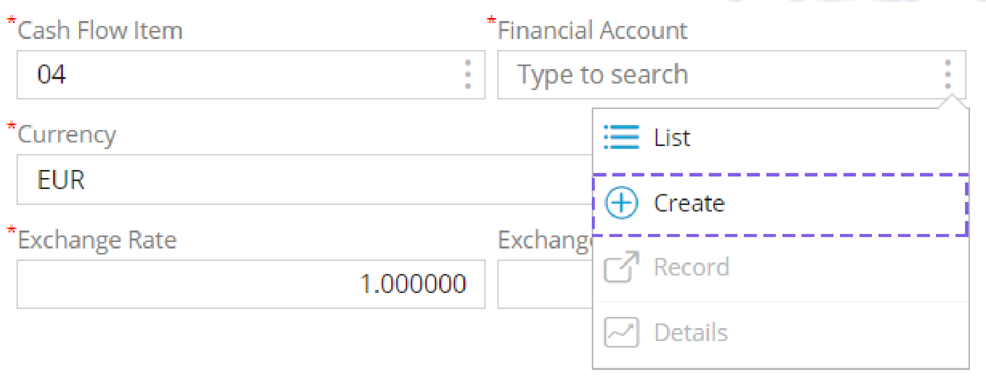


Image 1002

- Enter the required fields on the **Create Account** form marked with an asterisk (*).

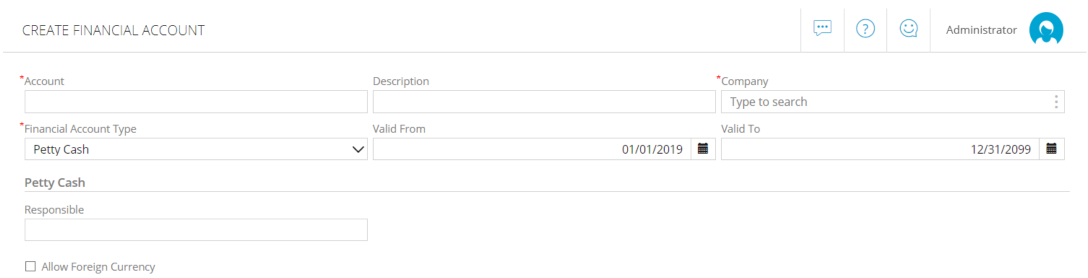


Image 1013

- After filling the fields in, select **Save and Return**.

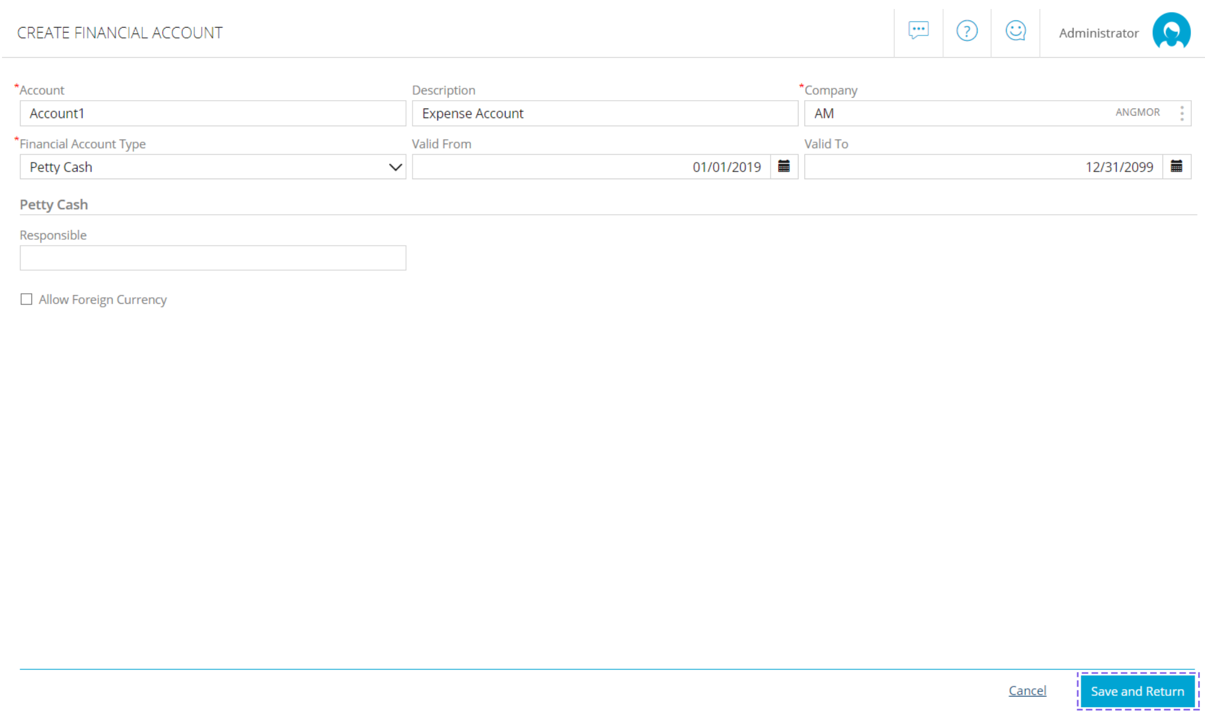


Image 102

- Information concerning the financial account will be updated.

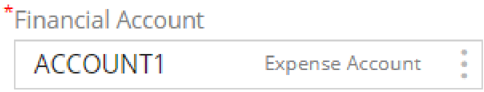


Image 103

- Please note that the Net and Tax totals are displayed at the bottom of the form. To finish your expense report, select **Save**.

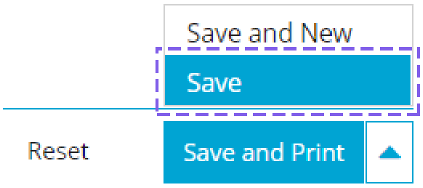


Image 104

- You can still edit, send and print your expense document after saving it.

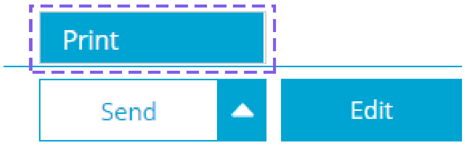


Image 105

Please note that the **113.82 euros** expense with **Goods expenses** reported will be carried over to the **Profit and Loss Report**.

17.3. Profit and loss report

Knowing how your business is running and where the money is being spent is essential to make decisions regarding how to increase revenue and control costs.

With this in mind, Jasmin provides a complete analysis of your profit and loss report and allows you to budget for items in the P&L.

To access your P&L report, select **Results | Profit and Loss**.

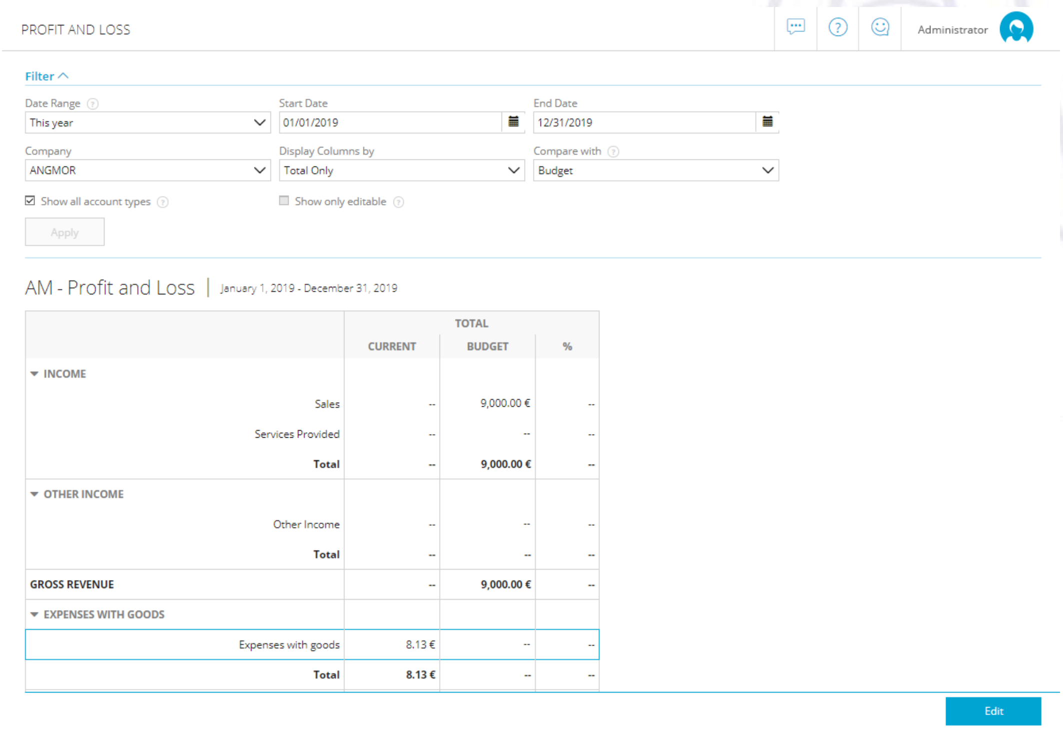


Image 1068

The **P&L Report** chart allows you to:

- See a complete overview of the accumulated or monthly totals in a specific time period.

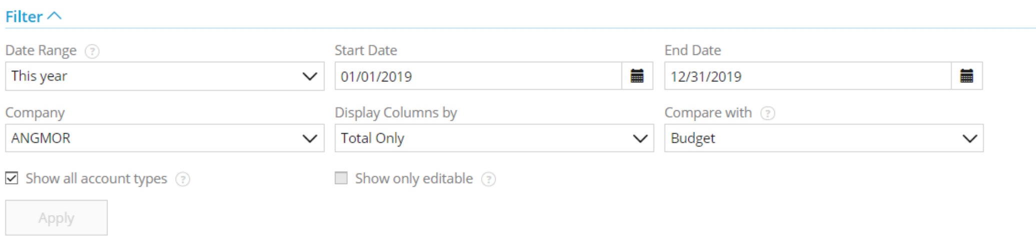


Image 1079

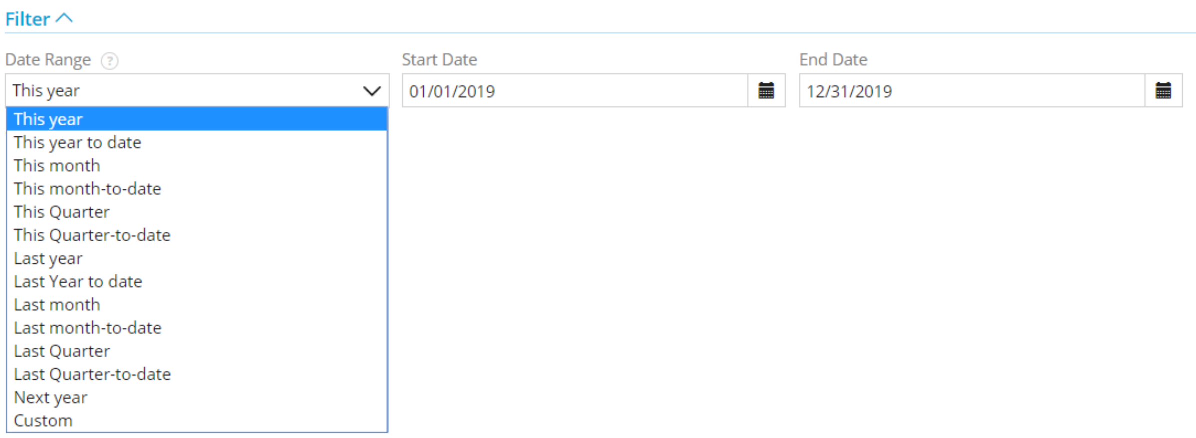


Image 1080

- Directly issue items not changed by documents such as **Expenses with Staff**;

PERSONNEL EXPENSES			
Remuneration	--	--	--
Charges	--	--	--
Total	**--**	**--**	**--**

Image 1091

- Some fields are automatically filled in using information from Sales (billing), Purchases and the Expense Reports (associated with the items);
- Some fields can be edited - Expenses with Salaries, Other Expenses, Compensation, Depreciation, Taxes, Interest and Charges.

AM - Profit and Loss | January 1, 2019 - December 31, 2019

	TOTAL		
	CURRENT	BUDGET	%
INCOME			
Sales	--	9,000.00 €	--
Services Provided	--	--	--
Total	**--**	**9,000.00 €**	**--**
OTHER INCOME			
Other Income	--	--	--
Total	**--**	**--**	**--**
GROSS REVENUE	**--**	**9,000.00 €**	**--**
EXPENSES WITH GOODS			
Expenses with goods	8.13 €	--	--
Total	**8.13 €**	**--**	**--**
OVERHEADS			
Advertising and Marketing	--	--	--
Honorary and Commissions	--	--	--
Tools and Utensils	--	--	--
Office Supplies	--	--	--

Image 1102

Software by

Primavera