User Manual for Admin Users, SMMware

Version 1.1.24

Note: See the 2 separate manuals for Team Lead Users and for Basic Users for essential functions which will not be repeated here.

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Introduction

Where Basic Users typically have viewing rights for many (but not all) commands, and Team Leads have more, Admin Users will have management rights (add/edit/delete) across the board. They can manage Associates, Clients, Jobs, etc.. Admin Users should also be familiar with the tasks of the Basic User and Team Lead User and should consult the Basic User manual and the Team Lead User manual.

This manual starts with commands that the Team Lead users have some access to, but also points out the additional capabilities which Admin Users have.

Each SMMware client has their own URL with the form of http://company-name.smmware.com. This URL will be jointly chosen by you as part of starting your subscription. Your instance of SMMware will look slightly different than the screenshots contained in this manual. Your company logo will appear in the header, and the color scheme will be customized.

Throughout the manual, note sections like this below, providing links to relevant YouTube videos:

	Watch our YouTube video about QuickBooks Online Integration at https://youtu.be/iXBXYqo__-o (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)

Requirements

To use SMMware, you will need the following:

Access to the Internet.

A web browser (Firefox, Chrome, and Safari are typical).

Cookies must be allowed (to maintain your login state).

Popup windows must be allowed (for help screens).

Mobile devices to have a minimum width of 750px in portrait mode.

Configuration, and The Settings Editor

When you first start your subscription, A SMMware Accredited Trainer can if you like work with you to configure your site. You may have worked with the Quick Start Guide, which addresses the minimum of necessary settings to get you up and running, or you may have used the full SMMware Configuration Questionnaire that provides you with a broad overview of SMMware's configuration options.

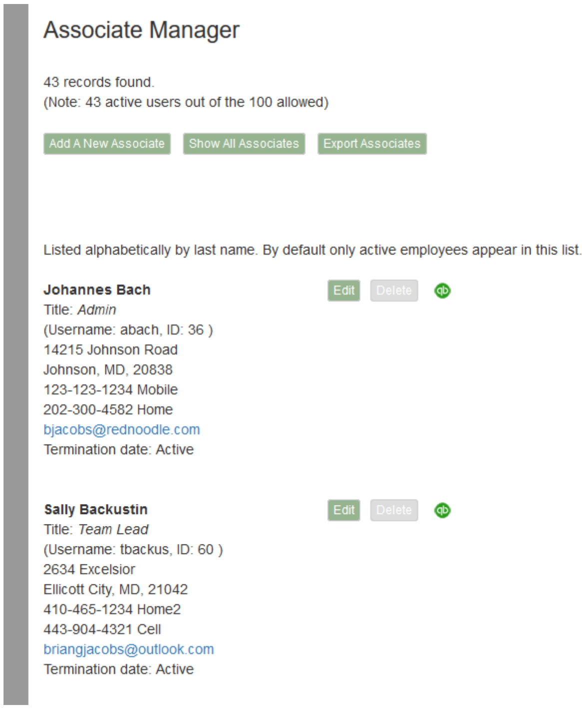
YouTube	Watch our YouTube video about the Settings Editor at https://youtu.be/7l7Nq_leX9k (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)

SMMware allows you a great many options for customizing your instance of SMMware via our Settings Editor. It can be found by navigating to Admin->Settings. The help page for the Settings Editor is a great place to start in understanding what aspect of SMMware is affected by a given setting. But you are also always welcome to contact us with questions or for help.

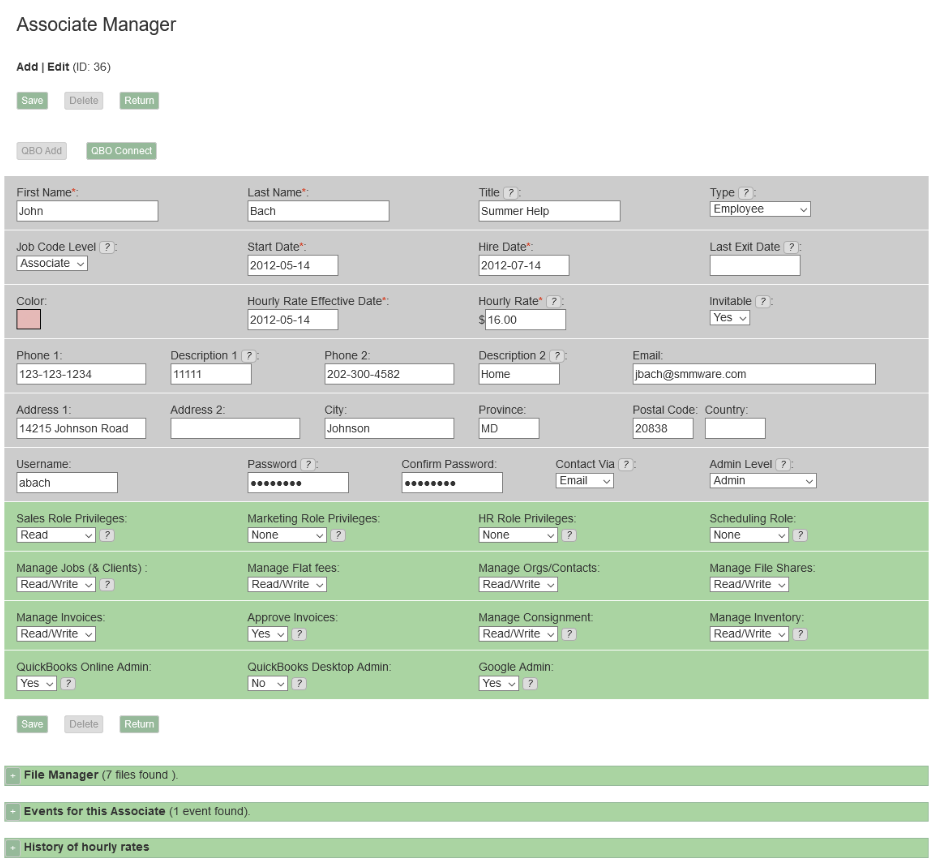
Associates

Instead of just "viewing" associates, an Admin User can add, edit, and delete them.

YouTube	Watch our YouTube video about the Associate Manager at https://youtu.be/5NxoFEawB3Y (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)



When you click on Edit for a given associate, you will be taken to a screen with fields where you can make changes.



The system keeps a history of the hourly rate and effective date. So as expected, work done prior to a raise is paid at the old rate, and work done afterwards at the new rate. This is true regardless of the date when the Payroll report is run.

Title Field

The title field can be any value you like, and is not tied to any other part of SMMware in a concrete way.

Type Field

The type field is also not tied to any other part of SMMware, with the exception that if you choose type "Vehicle", it affects charges to the client for travel. See the separate section about Vehicles.

Color

A color assigned to an associate has just one purpose. When editing an event and when using the "Availability" approach to attendee management, the colors are used for the 'week' view, so that you can easily tell which employee is available/unavailable. See the Scheduling section of the Team Lead Manual for more detail.

Job Code Level

When using job codes, there may be multiple sets of codes. A common scenario provides one set for Team Members, and another set for Team Leads. A given associate will get to choose from the combined lists of the sets they are assigned to (You can assign multiple job code levels). If you are not using Job Codes, this setting will have no effect.

Invitable

The 'Invitable' dropdown affects scheduling. When a new event is created in scheduling, a list of Associates is presented for choosing attendees/invitees. Invitable must be set to "yes" for the Associate to appear in this list. Some Associates may not be involved in events (Ex: a Bookkeeper), and the purpose of this setting is that they should not receive unneeded emails.

Contact Via

The "Contact Via" setting is used for Scheduling, Tasks, and Calls. The Road Map of future development includes contact via texting, and this setting is in anticipation of that. The dropdown can be set to "Neither" to prevent any emails/texts being sent.

Last Exit Date

As would be intuitive, an associate cannot be deleted once they have made any hours/expense/mileage entries. When an associate is no longer be with the company, the appropriate action is to set a Last Exit Date in their profile. If they should return, just blank out the Last Exit Date to make them active again.

Only active associates can log in. Even if you don't change their username/password, the fact that they have a Last Exit Date set will prevent logging in.

Admin Level

The options here are "Normal User", "Team Lead", "Admin", "Senior Admin", and "Company Owner".

The Sales Role

If the Sales Role privileges are set to “None”, the Associate won’t have the “Sales Lead” item appear in their submenu under “Clients/Sales”. If this field is set to “Read/Write”, they will have the menu item and will be able to add/edit/delete Sales Leads.

The Marketing Role

If the Marketing Role privileges are set to “None”, the Associate won’t have the “MailChimp Commands” menu item under the Admin menu. If set to “Read/Write”, they will.

The HR Role

This role affects whether the Associate can add and edit Associates. Having it also allows them to see the pay rate for a user, and allows them access to the Payroll Report.

It also allows them to see the File Manager section under an Associate profile. The normal user who has this field set to “None” will not see the File Manager even under their own profile. Typical use of this File Manager is to store performance reviews.

Normal users can “View” the profile for other Associates, but various sensitive fields will have asterisks in them (such as hourly rate and home address). They can see email address and phone numbers, allowing Associates to contact each other.

The Scheduling Role

If the Scheduling Role privileges are set to None, the Associate won’t have the Master Calendar item appear in the menu (found in either the Admin menu or the main menu), and won’t have access. Read access means they can view it, and Read/Write access means they can add/edit/delete events from the Master Calendar. All Associates can view their “My Schedule” section on the homepage, regardless of the setting for this field.

Various Permissions

The follow permissions are straightforward, affecting the areas described by their titles:

- Manage Jobs (& Clients)
- Manage Flat Fees
- Manager Organizations/Contacts
- Manage File Shares
- Manage Invoices

Approve Invoices

From within the Invoice Manager, this permission allows the user to directly set the approval level of an invoice. As a prerequisite, the user has to already have 'Manage Invoices' set to 'Read/Write', so as to have edit access to the invoice.

Manage Consignment

If the Consignment module is not enabled, this permission has no effect.

Manage Inventory

If the Inventory module is not enabled, this permission has no effect.

QuickBooks Online Admin

This permission only appears if the person editing the Associate Profile has their 'Admin Level' set to 'Company Owner'. The thinking behind this restriction is that this permission is important, will only be assigned to a few people in any given company, and is not expected to change often.

If the QuickBooks Online integration is not enabled (in Section 1 of the Settings Editor), this setting has no effect.

QuickBooks Desktop Admin

This permission only appears if the person editing the Associate Profile has their 'Admin Level' set to 'Company Owner'.

If the QuickBooks Desktop integration is not enabled (in Section 1 of the Settings Editor), this setting has no effect.

Google Admin

This permission only appears if the person editing the Associate Profile has their 'Admin Level' set to 'Company Owner'.

This permission allows the user to set up integration with the Google Calendar (see Section 4, Calendar, in the Settings Editor). This permission is unrelated to access to the SMMware Master Calendar, and unrelated to a user having access at Google to any given Google Calendar.

Zapier Admin

This permission only appears if the person editing the Associate Profile has their ‘Admin Level’ set to ‘Company Owner’.

This permission allows the user to set up the integration with Zapier.

Pay Levels

SMMware offers two approaches to paying associates:

- Per Associate Profile: This is the simpler approach and does not require as much configuration as using Job Codes does.
- Per Job Codes: This approach supports more complex situations, but does require more setup. It is tied to using Job Codes.

The approach to use for Associate pay can be selected on a job by job basis. So some jobs may pay according to 'per Associate Profile while others pay 'per Job Codes'. A reason why both might be in use is administrative done directly for the company that does not involve a client, where the pay scheme is probably simpler.

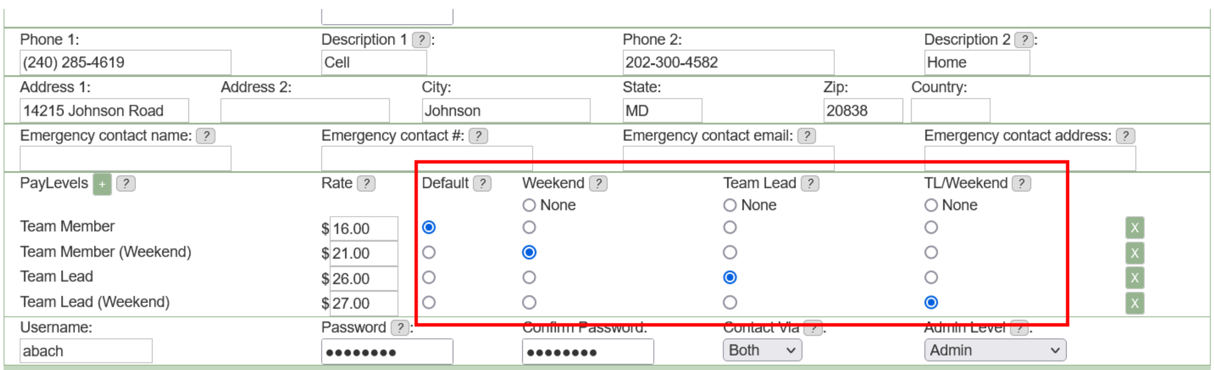
Since both can be in use, you might never use some of the settings that are visible, but nevertheless need to understand a little about them.

Per Associate Profile:

Pay 'Per Associate Profiles' handles four situations.

- As a Team Member, when the work day is a weekday
- As a Team Member, when the work day is a weekend
- As a Team Lead, when the work day is a weekday
- As a Team Lead, when the work day is a weekend

When 'Per Associate Profile' is used, the columns highlighted in red in the image below (from an Associate Profile) are relevant.



The rules are:

- SMMware will determine if the associate is acting as team lead or not.
- SMMware will determine if the work date fell on a weekday or weekend
- SMMware will use the 'Weekend', 'Team Lead', and 'TL/Weekend' columns of radio buttons to find a match.
- If SMMware cannot find a match, it will fall back to the default rate (as indicated by the 'Default' radio button).

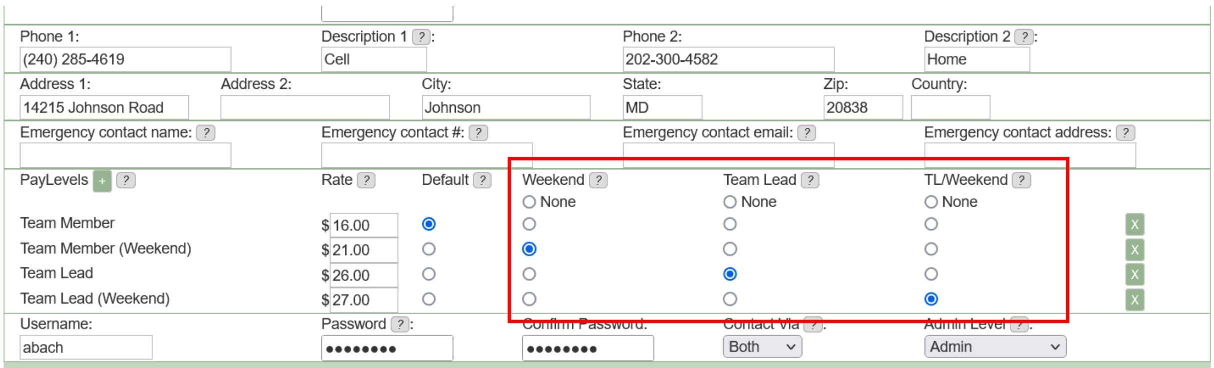
Notes:

- The name of a pay level (whether Team Member, Team Lead, or other) is strictly for human consumption, SMMware does not assign any meaning to the name of a pay level. SMMware acts based on the radio button settings.
- The columns 'Weekend', 'Team Lead', and 'TL/Weekend' are tied to specific functionality. The names of these columns are the underlying criteria are not currently editable.

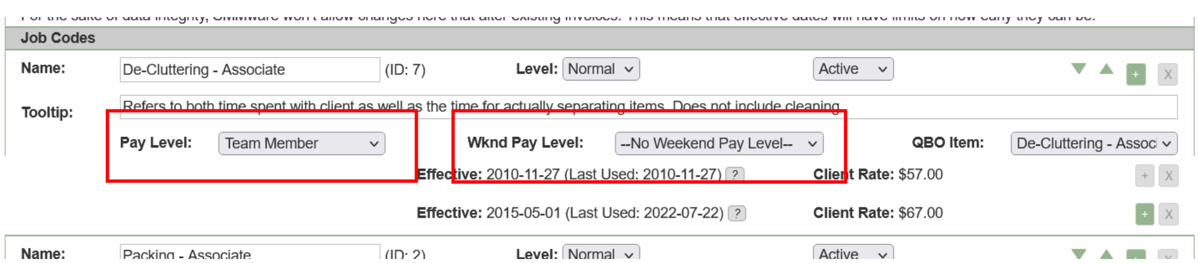
Pay 'Per Job Codes'

When paying ‘per Job Codes’, associates choose a job code when entering hours.

For a job that pays ‘per Job Codes’, the first thing to understand is that the columns below (from an Associate Profile) outlined in red are not used at all.



Instead, in this case SMMware will understand which pay level to use based on settings seen when editing Job Codes (Admin->Settings, Section 6 Job Codes). See the red outlines in the image below. A Job Code can have two pay levels assigned to it, one for when the work date was on a weekday, and one if on the weekend.



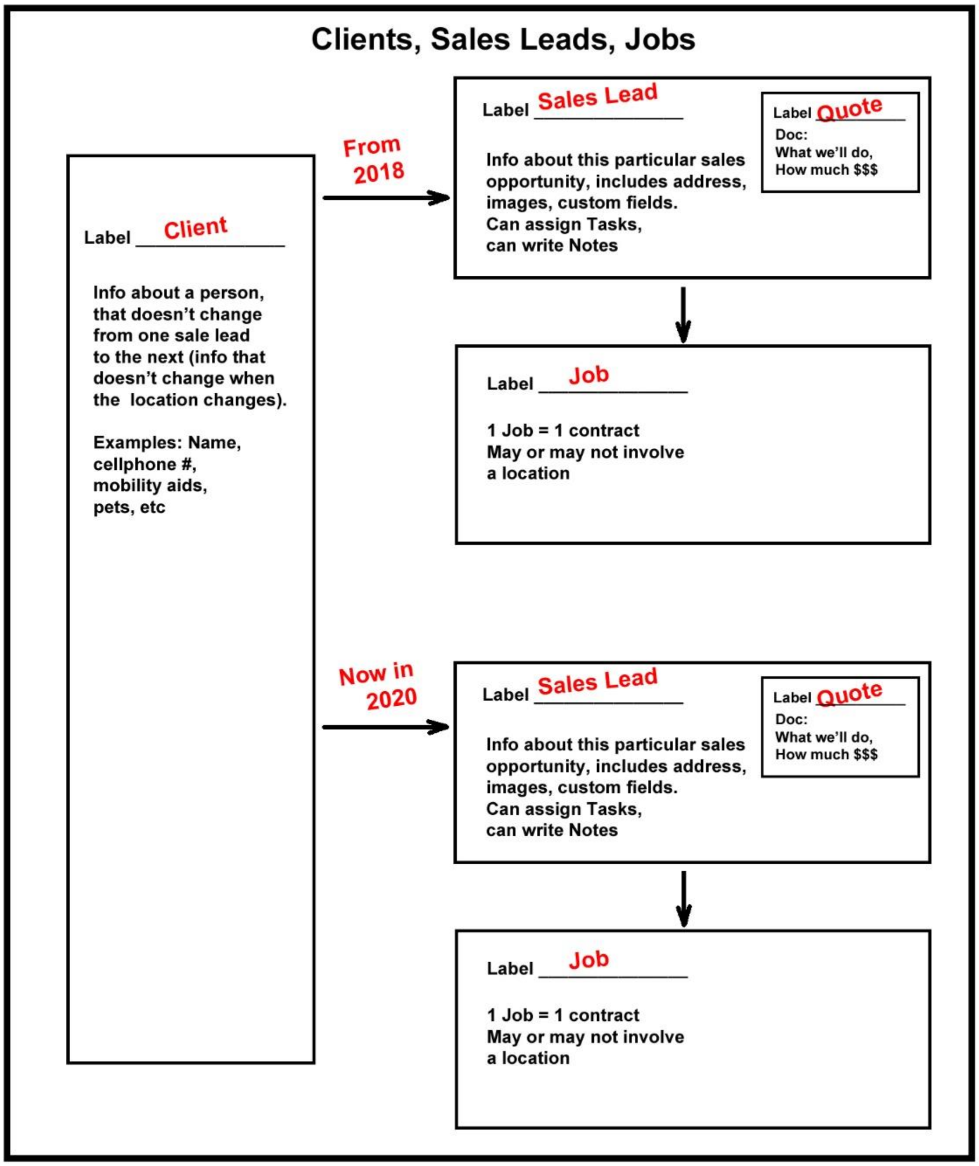
The rules here are:

- SMMware will determine if the work date was on a weekday or weekend.
- SMMware will examine the chosen Job Code to find the name of the pay level assigned (weekday or weekend)
- SMMware will examine the associate profile to see if the name of the Pay Level found above is in the list of Pay Levels assigned to the Associate in question. Again, this is based on the name of the desired pay level. If yes, that pay level will be used. If not, SMMware will fall back to using the radio button selected in the ‘Default’ column.

Introducing Clients, Sales Leads, and Jobs

Next are three closely related types of records in SMMware: Clients, Sales Leads, and Jobs.

The following diagram illustrates the relationships.



SMMware allows you to change the label for Sales Leads, so your system may have a different term (Examples: Inquiries or Estimates).

Someone who has hired you now, has hired you in the past, or may hire you soon, is a Client. That is to say, they are a Current Client, a Past Client, or a Potential Client. SMMware stores information about a given work opportunity with a Client in an Sales Lead. Once you have won the work, information is stored in a Job.

You can think of the Client record as the place where information goes about the person, things that don't change from one Job to another. Examples would be their name, mobility issues ('uses a walker'), mental acuity, or name of a pet.

It is common to get repeat business from a client, and it would not make sense to enter basic information such as their name into the system multiple times.

The information specific to a given work opportunity goes into a Sales Lead. This can include the traditional document of 'What we'll do for you, & how much it will cost'. But you may also want to take notes over multiple meetings with the client, you may want to assign Tasks (generate a quote, follow up with Client). You may want a place to store information like elevator codes or when garbage collection is, and the Sales Lead provides custom fields for that purpose. It is also common to take photos during the 'sales phase', and you will want a place to store those. All of these types of information go into a Sales Lead.

Once you've won the work, you create a Job from an Sales Lead, and the Job will inherit various information from the Sales Lead such as the photos and the custom fields. New information such as hours worked, are now stored with the Job.

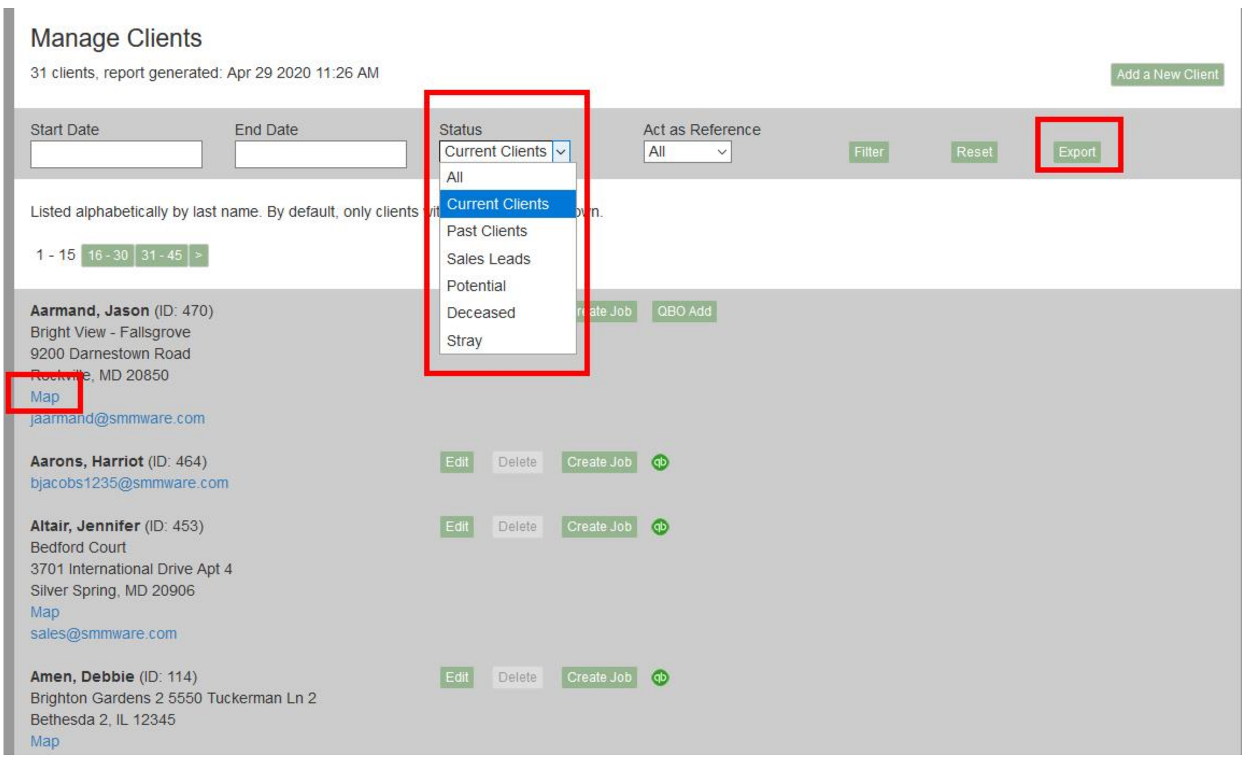
Next, each of these three will be explained individually in more detail.

Clients

	Watch our YouTube video about the Client Manager at https://youtu.be/cmrTdMto2K8 (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)

Below is a client listing, found by navigating to 'Clients/ Sales -> Manager Clients', with a top section in grey that allows you to filter the output. The large highlighted section in the middle of the filter allows you to list clients based on their status with you.

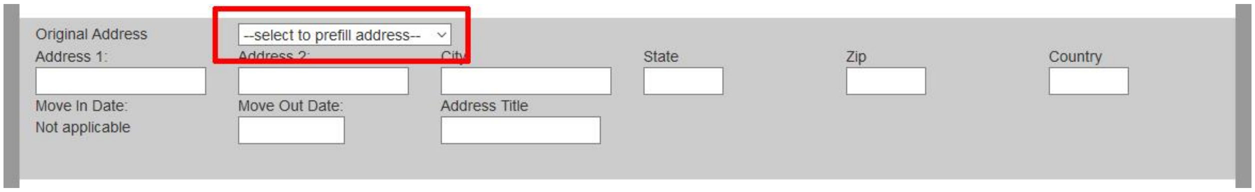
Whenever you visit this page from somewhere else, the default setting is 'Current Clients'. This way, you don't have to look at clients who you haven't had work with for several years, only the ones you are working with now. Note that when you first create a client profile, you'll want to immediately also create a job or a Sales Lead, so that the Client shows up in the applicable listing.



Also note in the image above that a given client entry includes a 'Map' link that will open a mapping function in a new tab (such as Google Maps or Apple Maps), and that you can export a client listing.

For an existing client, at the top of the page, and to the right of the text "Jobs for this client" there will be a set of links for all jobs for this client. Clicking on the link takes you to the edit screen for that job.

You can autofill the addresses from the list of common locations (such as Senior Living Centers) defined in the Organizations section of the site.



SMMware keeps a history of addresses for a client, see Appendix D, Address Histories for a detailed explanation. In a client profile, the “Current Address” section only appears once you’ve moved someone, where the new address is recorded in the Job. Here, the system displays that new address and give you a link to the job if you need to edit it.

Sales Leads

You can find the Sales Leads listing by navigating to ‘Clients/Sales -> Manage Sales Leads’.

There is also a filter here, and the default shows you Sales Leads which are either ‘In Progress’ (you are working on it) and ‘Submitted’ (you are waiting for a response).

Below is the list of the status options a sales lead can have:

- Inquiry - A very casual call, with no short term expectation of work. Sales Leads with this status level DO NOT appear in the dropdown on the Master Calendar.
- Prospecting - A level of interest higher than 'Inquiry' yet lower than 'In Progress'. Sales Leads with this status level DO NOT appear in the dropdown on the Master Calendar.
- In Progress - You are actively working with them to generate a quote. Sales Leads with this status level appear in the dropdown on the Master Calendar
- Submitted - You can given them a quote and are waiting for a response. Sales Leads with this status level appear in the dropdown on the Master Calendar
- Suspended - The potential client has put things on hold. Sales Leads with this status level DO NOT appear in the dropdown on the Master Calendar.
- Won - You have won the work, and presumably created a 'Job'. Sales Leads with this status level DO NOT appear in the dropdown on the Master Calendar.
- Declined - The client did not hire you. Sales Leads with this status level DO NOT appear in the dropdown on the Master Calendar.

The filter also has three 'pseudo' status levels for convenience:

- All - Affects the output just as expected, returning all sales leads regardless of status level.
- Current - Outputs a combination of 'In Progress' and 'Submitted', which are the two status levels for people you are actively working with.
- Won v Declined - A combination of 'Won' and 'Declined', provided mainly so that the statistics shown below the filter can display the win/loss percentage.

In the listing below, note that each entry includes the Estimated Amount, and that there is a total amount for the items listed appears above the listing.

Manage Sales Leads

Report generated: Mar 31 2021 10:46 AM

--all-- New Sales Lead

Start Date | End Date | Sales Lead Status --current-- | Client --all-- | Lead Salesperson --all-- | Filter | Reset | Export

Compare against ◉ Sales Lead creation date ○ Job begin date

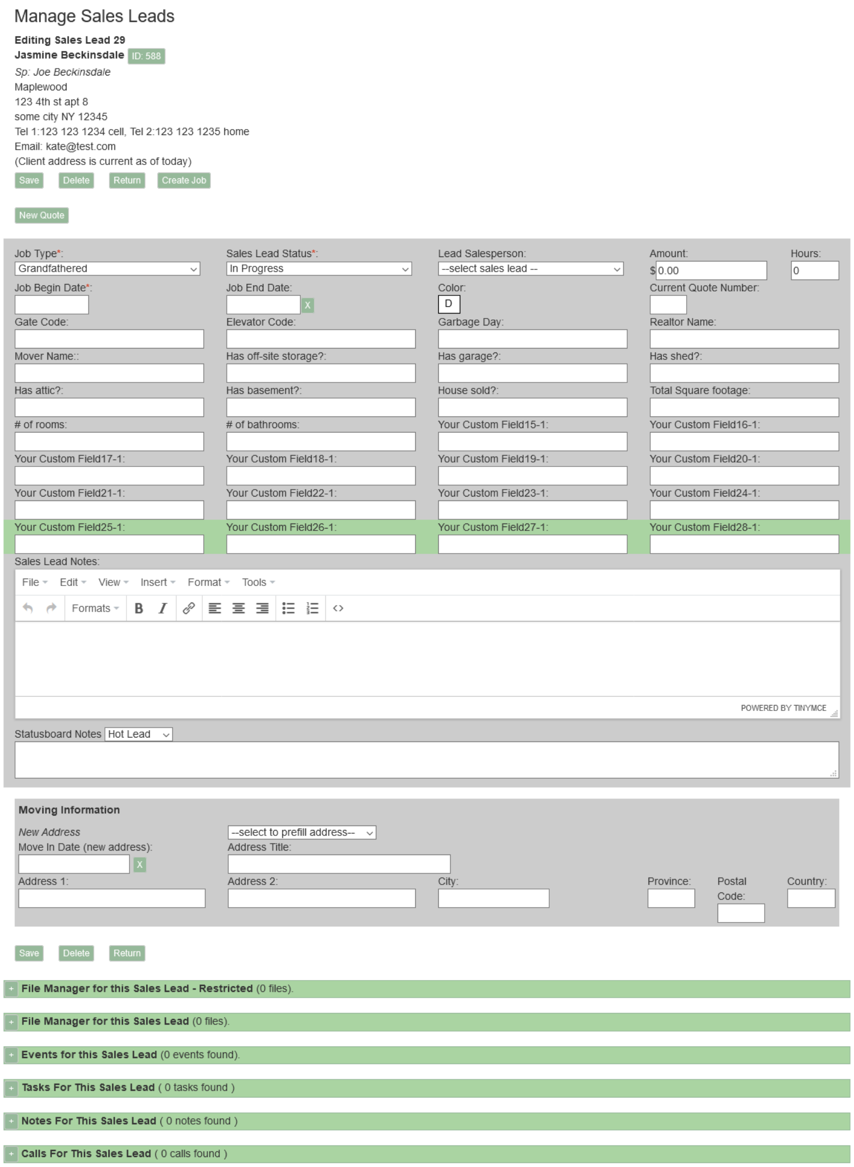
13 records total ($33,797.11, 347 hours)
12 in progress ($27,797.11, 287 hours)
1 submitted ($6,000.00, 60 hours)

By value: 82% in progress, 18% submitted
By hours: 83% in progress, 17% submitted
By quantity: 92% in progress, 8% submitted

Click on a header of a column to reorder the table

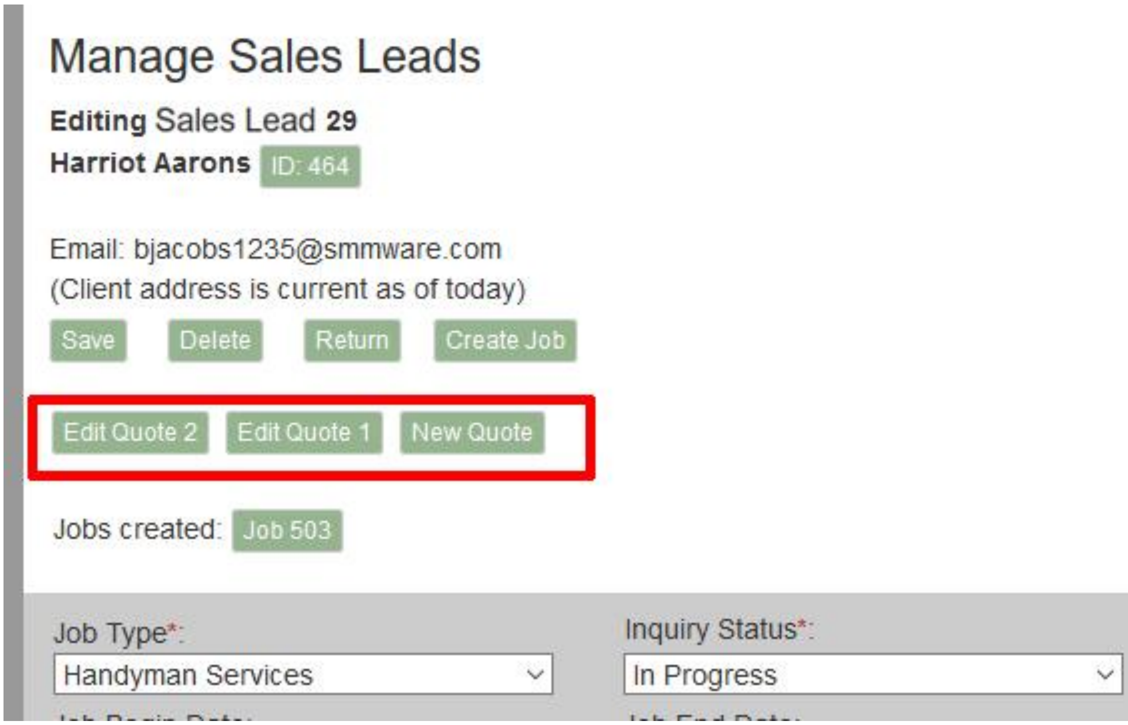
Inq #	Client Name Represented By	Lead Salesperson	Status	Type	Date Created	Inq Amt	Edit / Delete
22	Debbie Amen		In Progress	Estate Clean Out	Mar 27, 2020	$8,750.00	Edit Delete
9	Debbie Amen		Submitted	In Home Services	Mar 21, 2020	$6,000.00	Edit Delete
1	Debbie Amen	Dana Harris - 63	In Progress	Daily Money Management	Aug 01, 2019	$4,680.00	Edit Delete
32	Marilyn Anchorman		In Progress	Move Only	Oct 30, 2020	$3,117.11	Edit Delete
3	Marilyn Anchorman	Mandy Carlton - 3	In Progress	Downsize and Move Services	Oct 03, 2019	$4,500.00	Edit Delete
17	Ruth Banker		In Progress	Downsize and Move Services	Mar 22, 2020	$6,750.00	Edit Delete

Below is a Sales Lead Profile



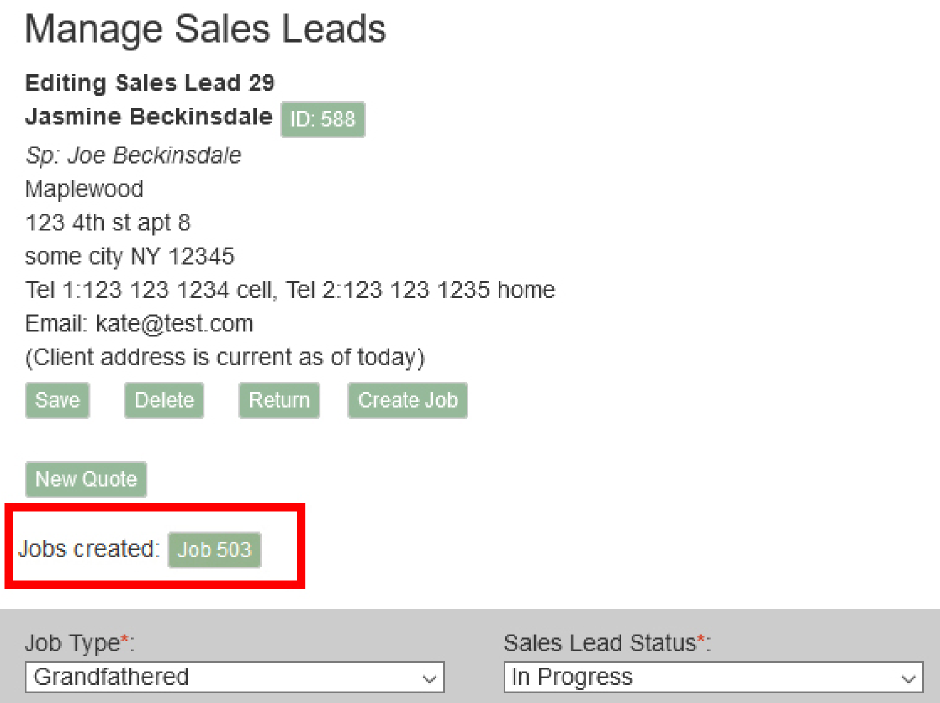
You store a number of types of information within the Sales Lead Profile. One type is information in Custom Fields, and if you create a job from this Sales Lead, the custom field information will be carried over.

After you give a quote to a potential client, it often happens that they will ask for a new version with changes. If you have previously been creating quotes using a word processor, you've probably created the new version by copying the initial one and revising it. SMMware allows you to continue this familiar and comfortable pattern. Within the Sales Lead Profile, these multiple revisions are labelled as Versions. You can copy a version, modify it, and save it to arrive at the new document to send to the client. You can also write a private note explaining what is different about the new version. See the diagram below, which shows that the Sales Lead Profile includes two versions so far.

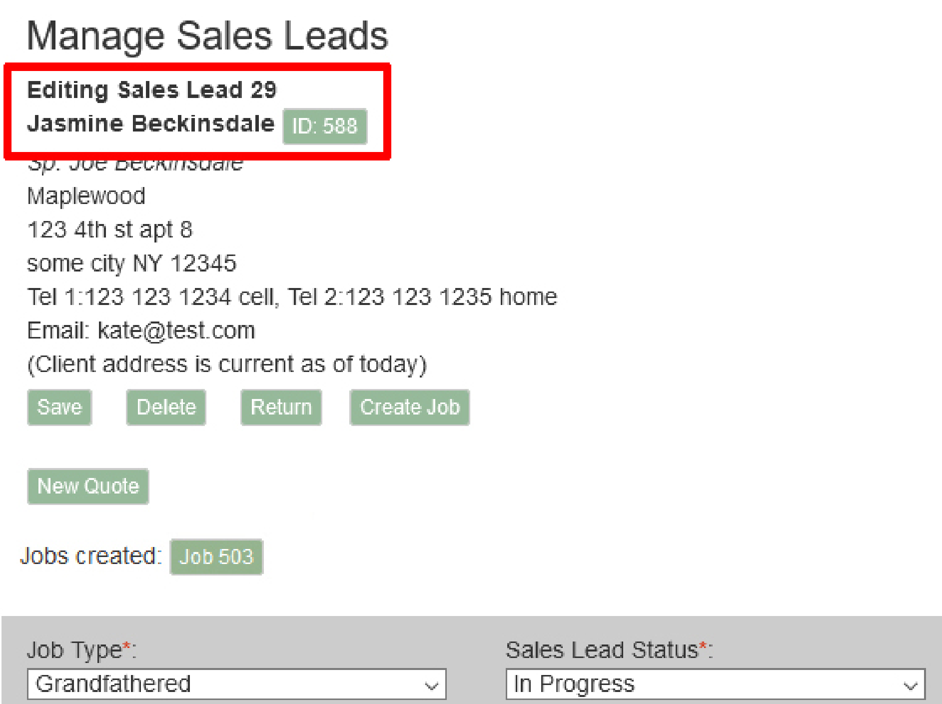


When you win the work, you can create a Job from the Sales Lead. The 'Create Job' button for that is just above the list of versions.

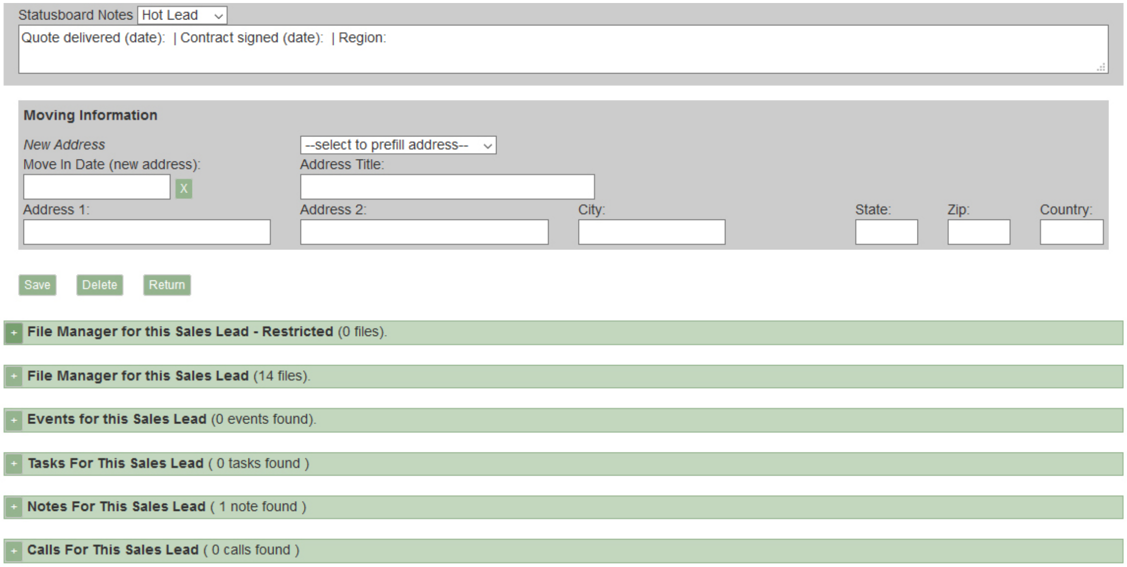
Below the list of versions, if a job has been created from this Sales Lead, you'll see that job displayed just below the version list. Clicking on the job number takes you to that Job Profile.



Note, next to the client's name is their Client ID number, and clicking on that jumps you to the client's profile.



At the bottom of the Sales Lead Profile, you can see the sections where you can upload images and other documents, or create Tasks or Notes.



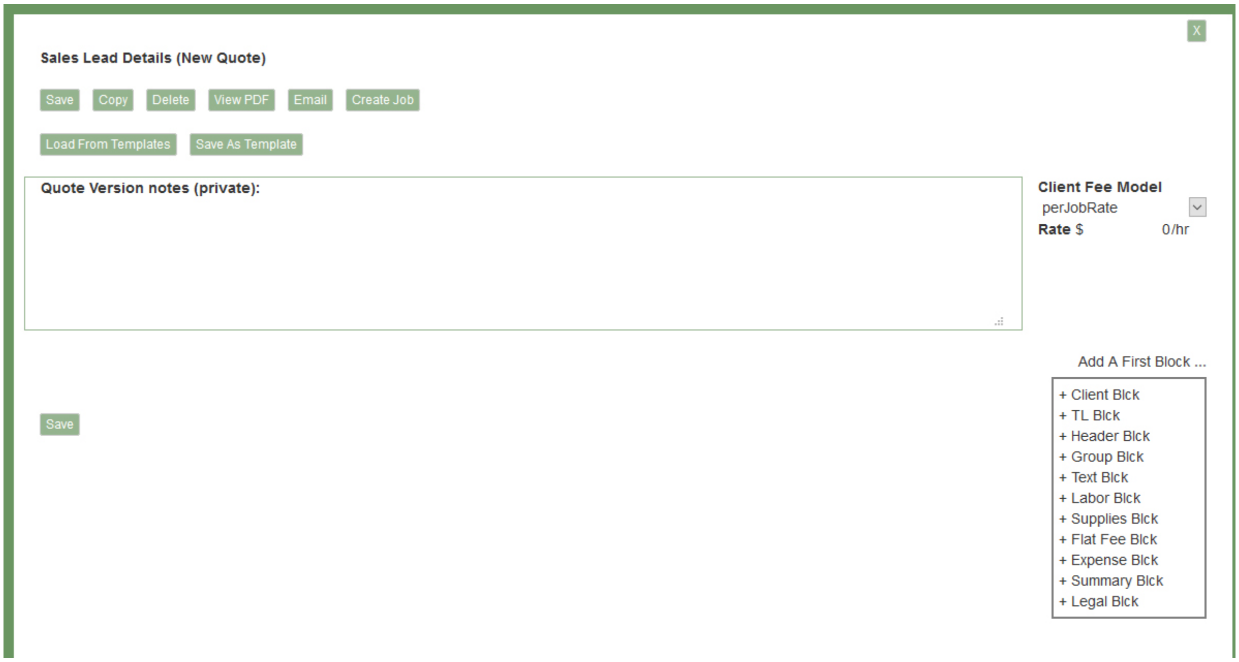
Automations

SMMware's automations for Sales Leads include various Tasks assigned to the Lead Salesperson: When they are initially assigned to the Sales Lead, when a 'Customer Decision Date' (to follow up at that date) or 'Submition Date' (to follow up a week after). SMMware will also create Notes for these so as to contribute to the history of this Sales Lead.

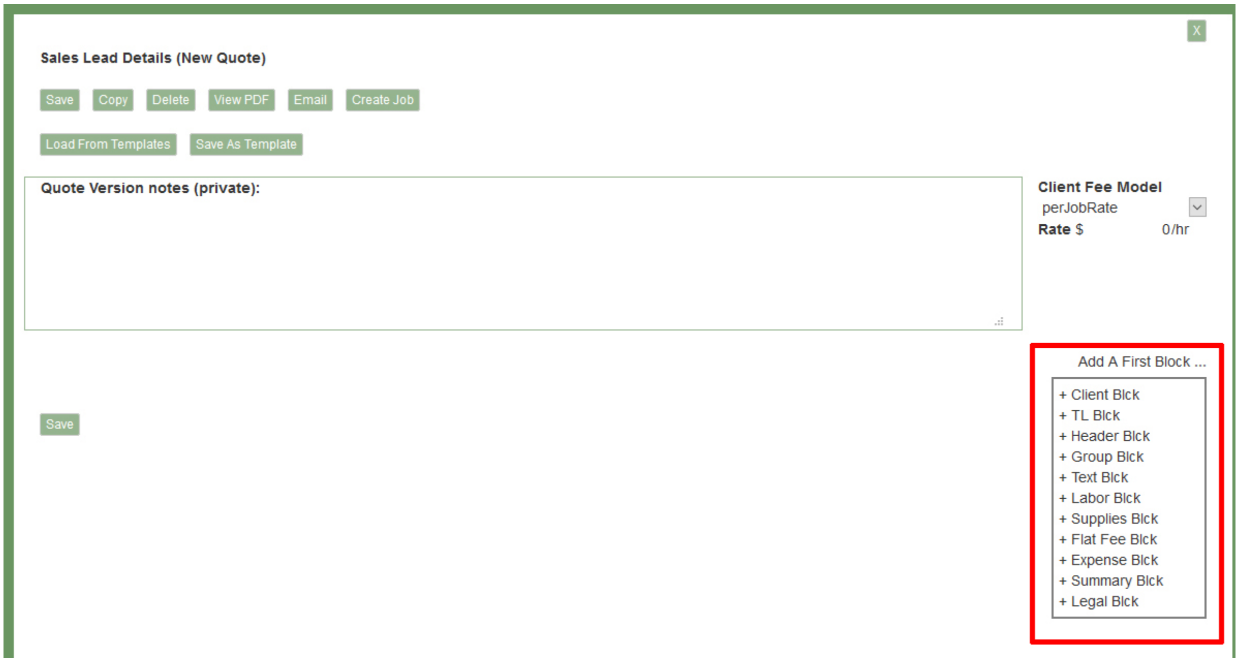
Next we'll discuss how to create your quote, and manage the versions of it.

Quotes, and Quote Templates

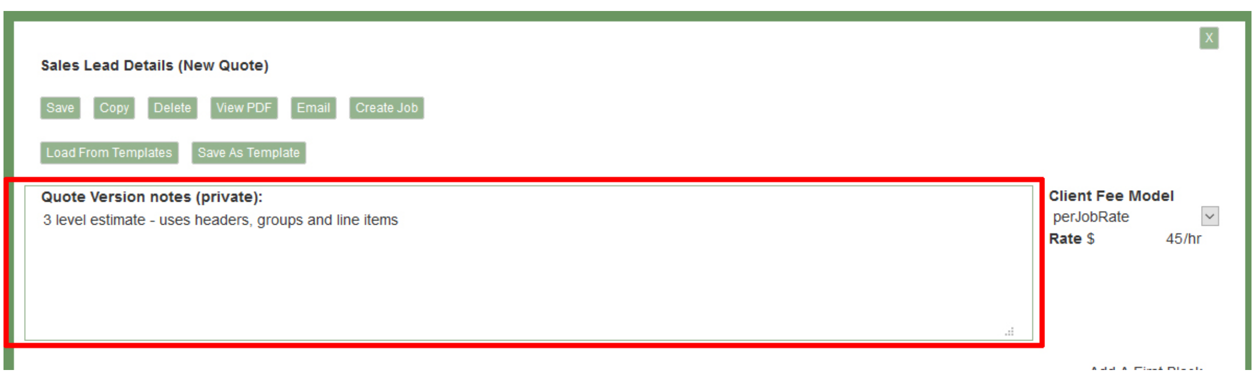
For a new Sales Lead Profile, you'll only see the 'New Quote' button. Clicking on it opens a window where we will start to deal with the 'what we'll do, what we'll charge' aspect of the process.


X
Sales Lead Details (New Quote)
Save
Copy
Delete
View PDF
Email
Create Job
Load From Templates
Save As Template
Quote Version notes (private):
Client Fee Model
perJobRate
Rate $
0/hr
Add A First Block ...
Save
+ Client Blck
+ TL Blck
+ Header Blck
+ Group Blck
+ Text Blck
+ Labor Blck
+ Supplies Blck
+ Flat Fee Blck
+ Expense Blck
+ Summary Blck
+ Legal Blck

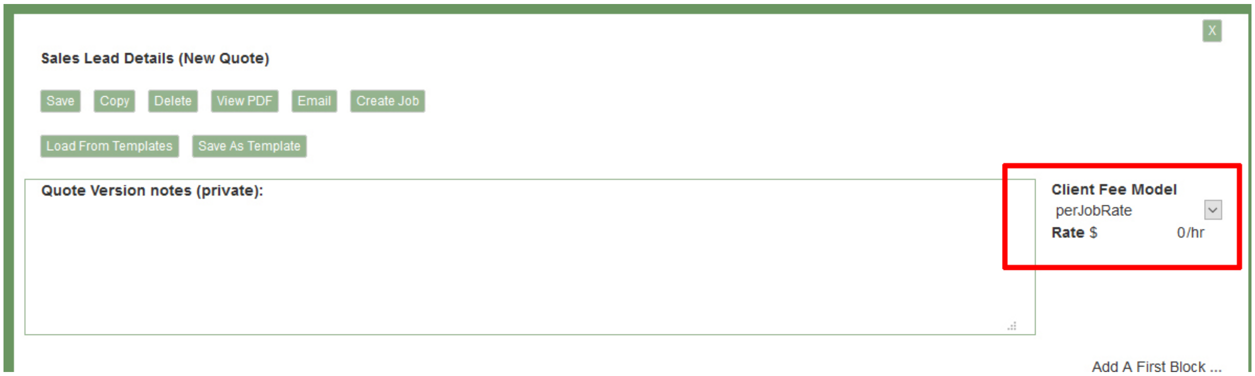
A SMMware quote is built of blocks, and SMMware provides you with a variety of block types. Creating a quote is a question of mixing and matching those blocks to suit your specific needs. For a new, blank quote, clicking on the three dots next to 'Add a First Block' brings up the list of blocks.



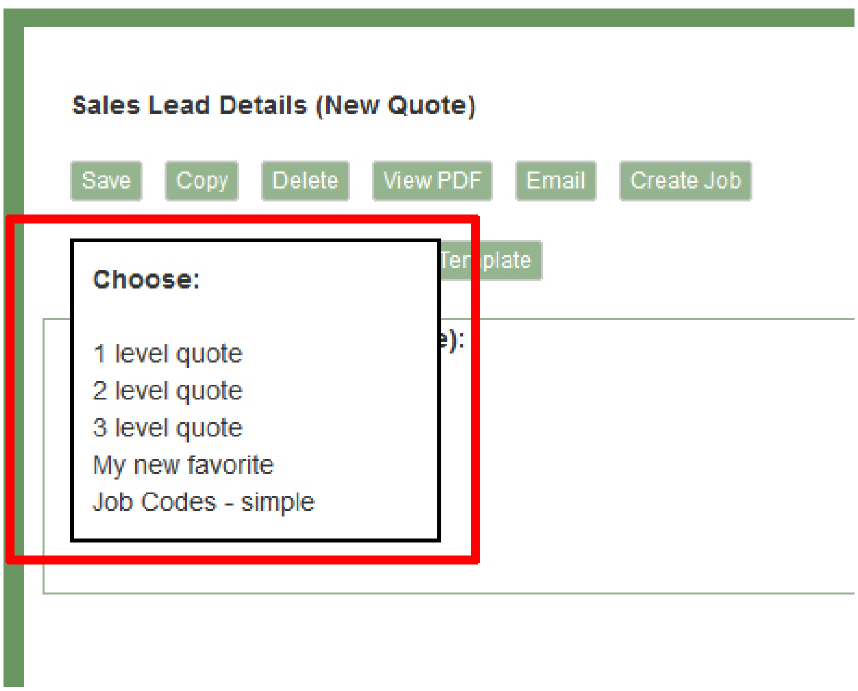
If you create more than one version of a quote, you'll find the "Quote Version Notes" field handy, as you can describe to yourself how this version is different than the last.



As you might expect, the approaches to pricing in the Quotes matches that found in Jobs. You can either charge a client the same rate for the whole job (a 'per job' rate), or you can charge different rates depending on the type of work being done per 'Job Codes'. You can choose which approach using the 'Client Fee Model' dropdown seen below.



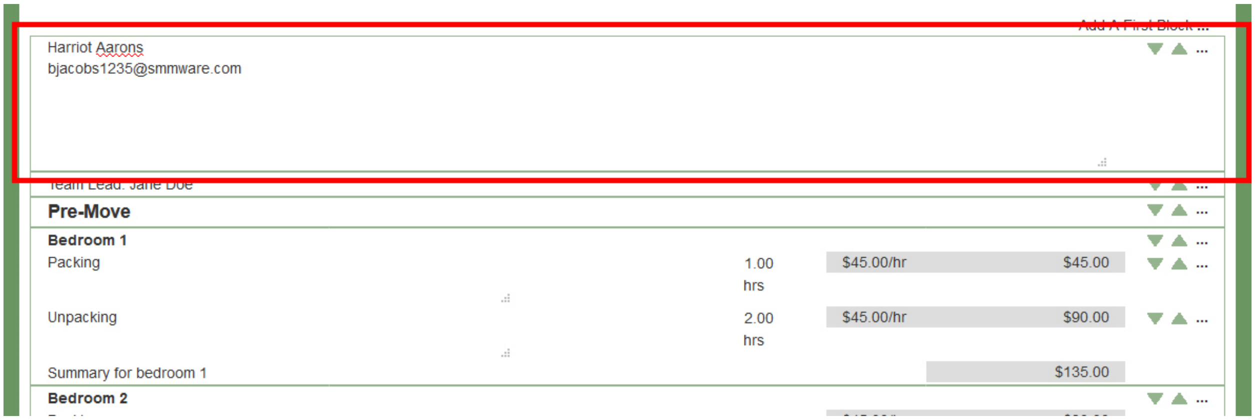
Once you have developed a quote, if you feel that it is a good starting point for future quotes for other clients, you can save it as a 'template'. Next time you start a quote, instead of starting from scratch, clicking on 'Load Template' brings up the list of templates to choose from. Selecting one will bring the blocks from that template, and you can modify it from there.



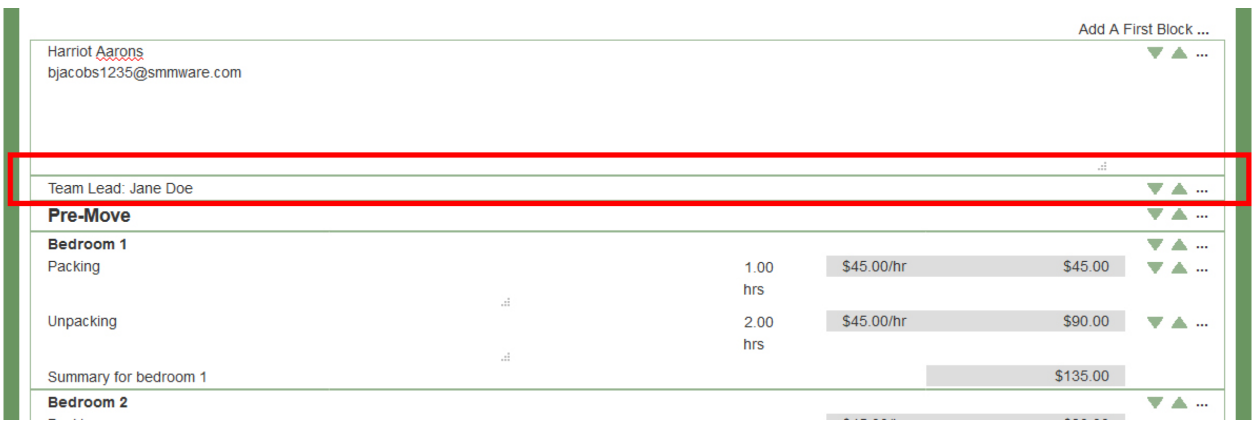
One approach to templates might be 'Small Job', 'Medium Job', 'Big Job'. Or perhaps 'Pack Job', 'Downsizing Job' and other task specific entries. Or you might build a really long master version with 'everything but the kitchen sink', such that you can quickly delete the things you don't need.

Below is a more developed example of a quote. We’ll use it to explain about the different block types next. Most areas that do not have a grey background are editable.

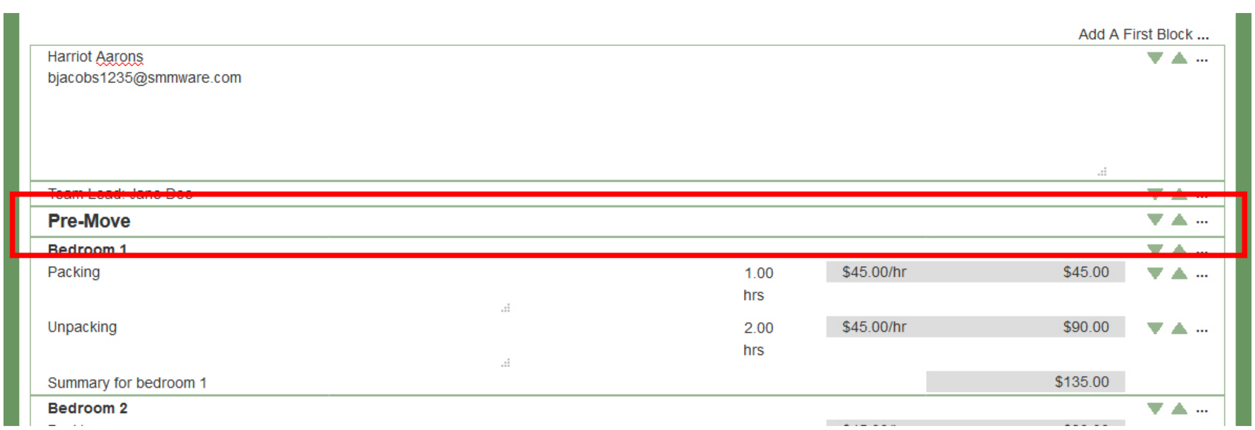
The ‘Client block’ pulls in the client name, address, and phone number, so that you don’t have to find it elsewhere and cut and paste it into place.



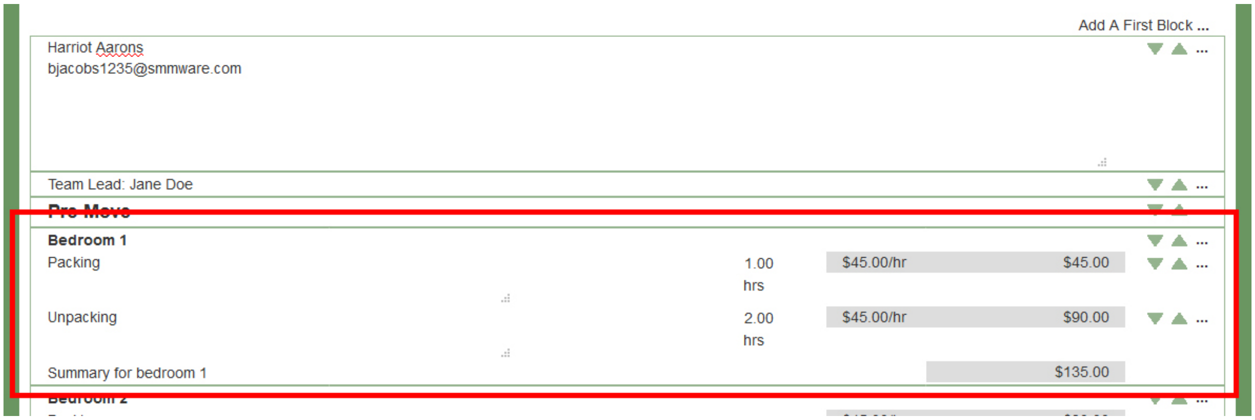
The ‘Team Lead’ block gives you a place to indicate a team lead, if your company wants to include that in the quote.



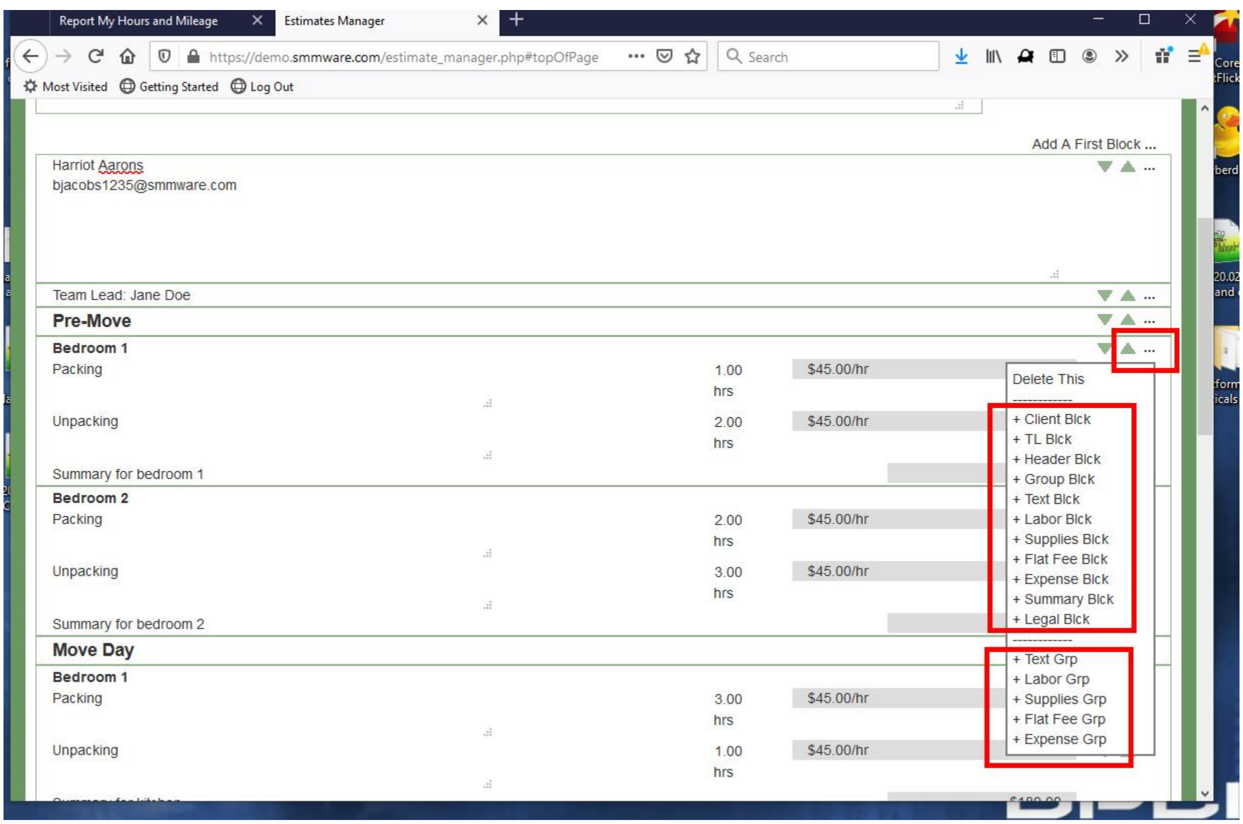
The ‘Header’ block simply provides large, bold text, and can be used to visually divide the quote into sections.



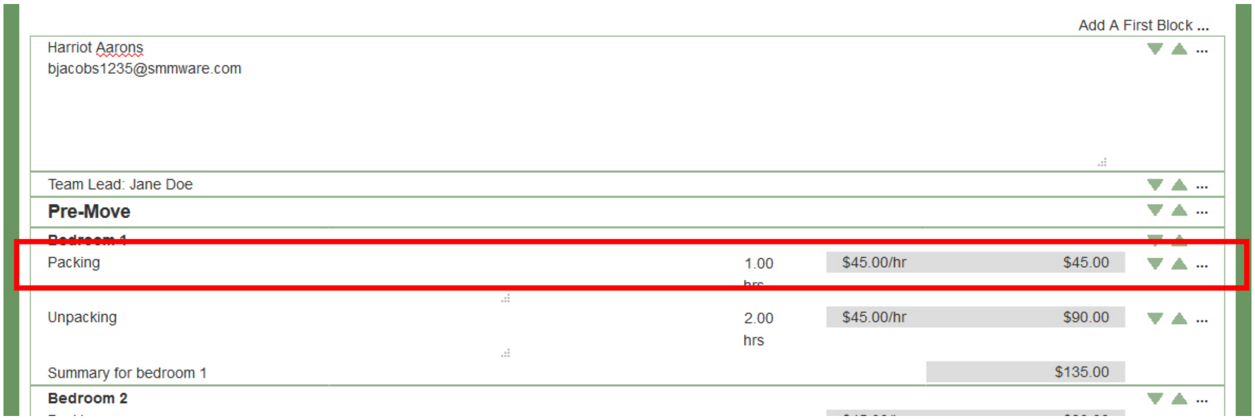
The ‘Group’ block allows you to insert line items inside it, and provides a subtotal for all line items it contains. It starts off without any line items in it, and you add those as you like.



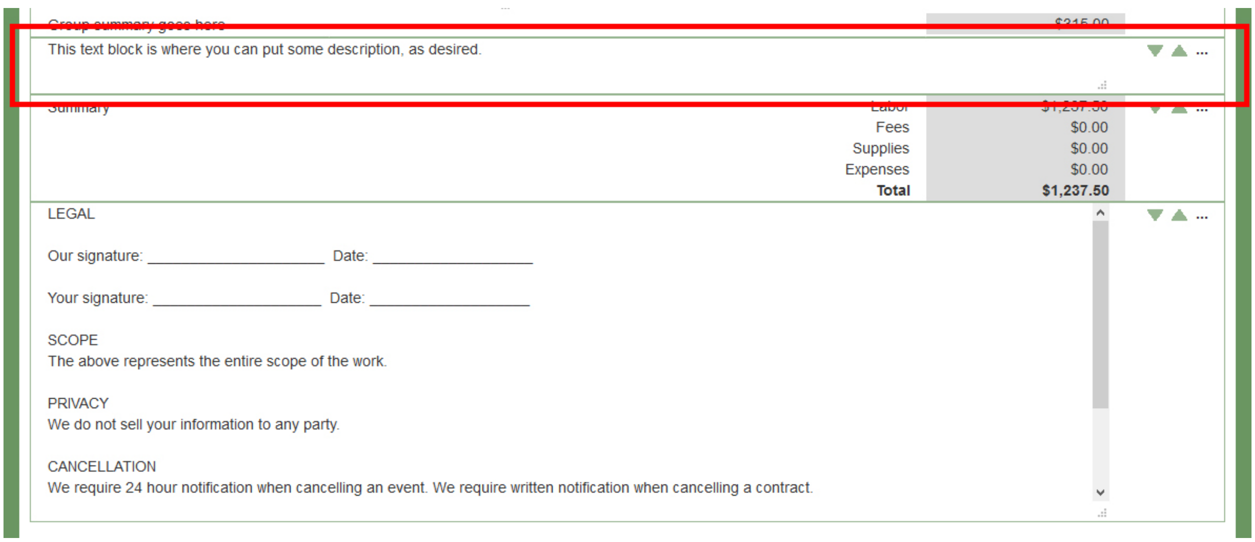
When you add a new block from the top line of a group (as seen below), you need a way to tell SMMware whether you want the new block to come after the group, or inside it. If you click on a block name that ends in ‘Blck’, the new block appears after the group. If you click on a block name that ends in ‘Grp’, the new block is inserted into the group.



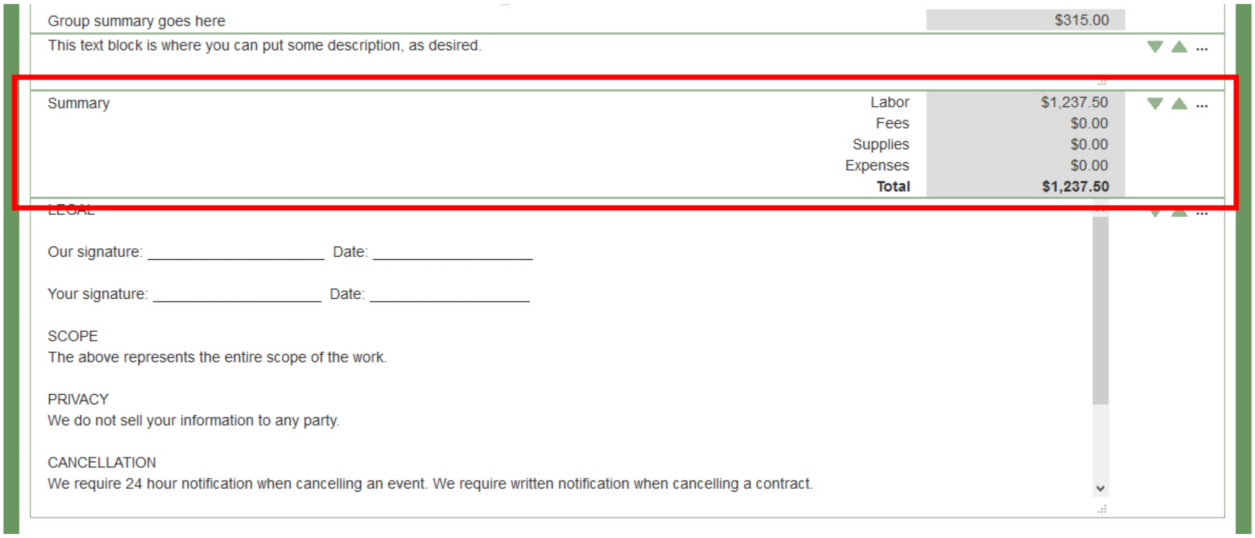
A ‘Labor’ block is used to indicate the hours worked. The rate comes from the overall rate if you are using a client fee model of ‘per job’ rate. If you are using a client fee model of ‘per Job Codes’, you will get a job code dropdown, and the rate comes from the job code.



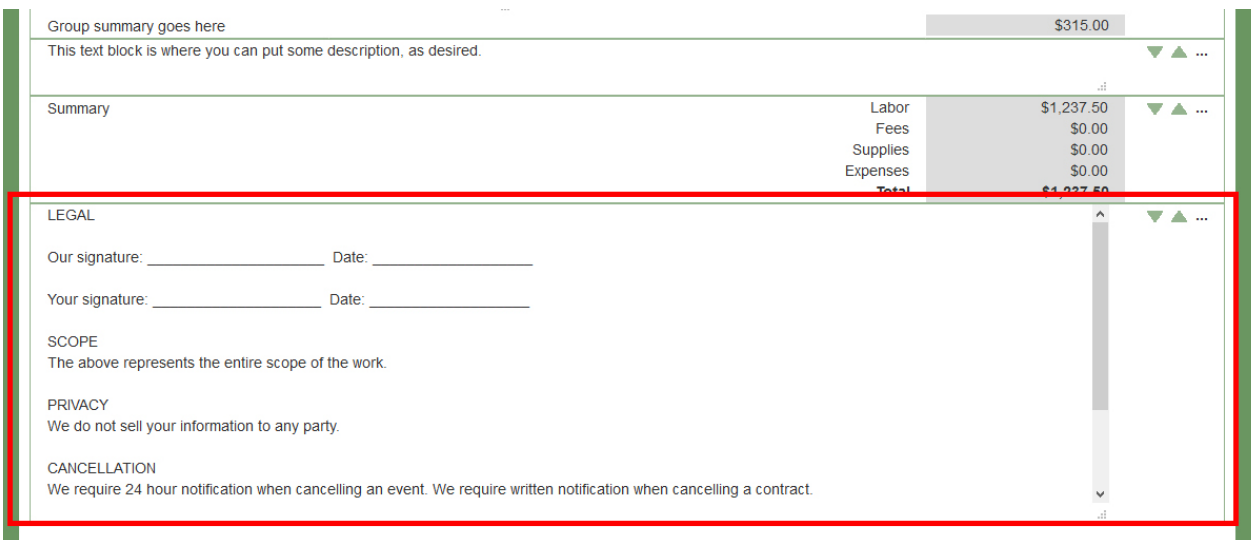
A ‘Text’ block is simply that, a place you can provide additional explanation.



The 'Summary' block provides subtotals for different categories, and the grand total. These are automatically calculated. You can put the summary block where you like, whether that is the top, middle, or bottom of the quote.



The 'Legal' block pulls in language which you can configure in the Settings Editor. Technically, it doesn't have to be contract language, but that is the anticipated use.



Using Digital Signing of Sales Quotes

SMMware allows you and your customers to digitally add legally enforcable signatures to sales quotes created in SMMware.

Within the Legal Block of a sales quote, SMMware accepts special tags that tell it who needs to sign the quote.

Each tag consists of a 'name' section which holds the client name, and a second 'contact via…' section for how to contact that person, although it is just shortened to 'via'. Be sure to include the semicolons as seen in the examples below.

Also, since a date field is mandatory, instead of making you include one, SMMware assumes that one is needed and inserts it automatically right after one of the tags below.

Here are some examples of tags:

- Using a name and email:_ [esign: Jane Doe via: jane@doe.com]
- Using a name and phone number:_ [esign: Jane Doe via: (240) 285-4619]

Tag Shortcuts

SMMware also allows you to put a shortcut into the name section. If you enter 'client', SMMware will substitute the name from the Client Profile. If you enter 'spouse', SMMware will use the spouse name fields, again from the Client Profile. If you enter 'sales', SMMware will pull in the name of the lead salesperson. If you used a shortcut in the name section, you can use 'email', phone1, and phone2 in the 'via' section. Note, if you enter 'phone', SMMware will assume you mean 'phone1'.

- Using the 'client' and 'email' shortcuts:_ [esign: client via: email]
- Using the 'spouse' and 'phone2' shortcuts:_ [esign: spouse via: phone1]
- Using the 'sales' shortcut: __ [esign: sales via: phone2]

When editing the sales quote, you will see an 'eSign' button that you click on to initiate the process. SMMware then uploads the PDF to SignNow, our partner for digital signing. SMMware also sends the command to SignNow to invite the signees.

The User Experience for Signees

The Signees will receive either an email or text message from SignNow and click on the enclosed link. This will take them to a webpage under SignNow, where they will complete the signing process.

Notifications

SMMware will email the Lead Salesperson when the document is opened, signed, and when it is complete. So be sure that the lead salesperson is set for a given Sales Lead, and that they have a working email address in their Associate Profile.

As each signature is added to the document, SMMware downloads a fresh copy so that when the quote is viewed, it will reflect that signature. When the document is complete, the PDF seen in SMMware will have a final page with a history of the eSigning activities (opened, signed, complete).

The eSigning Log Page

Navigate Clients/Sales -> eSigning Log to review eSigning activity. The filter will allow you to refine the output listing.

Enabling eSigning, Purchasing Signature Requests

To activate eSigning, navigate the main menu to Admin->Settings, and edit Section 1) Basic Settings. For the setting 'Should SMware integrate with eSigning, change the value to 'yes'.

Next, navigate to Admin->Subscription Manager. There you will purchase a package of signature requests. You can purchase as you go, or you can set your signature requests to autorenew.

Each document that is submitted for eSigning consumes a 'signature request' (one per document, not per signer).

Also, be aware that if you cancel the signing process before completion, the signature request is already used, and not returned to your inventory. So be certain that your document is correct before submitting.

Jobs

Here an Admin User can add, edit, and delete jobs.

Manage Jobs

26 records, report generated: 10-19-2016 10:52:10

--For a new job, first select a client-- | Create a new job

You can filter the jobs listing in three ways: 1) By date (compared against job "Begin Date"), 2) By job status, 3) By job type
By default, listing leaves out jobs with status "closed".

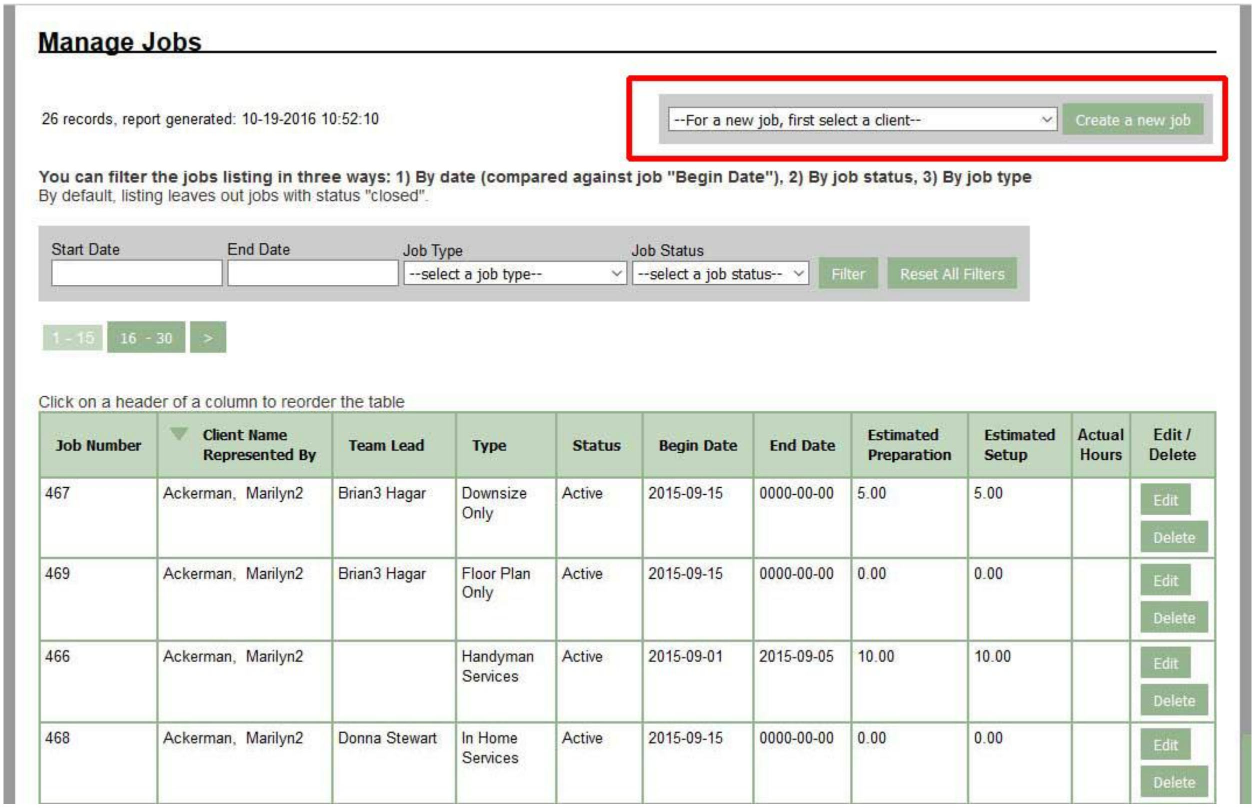
Start Date | End Date | Job Type: --select a job type-- | Job Status: --select a job status-- | Filter | Reset All Filters

1 - 15 | 16 - 30 | >

Click on a header of a column to reorder the table

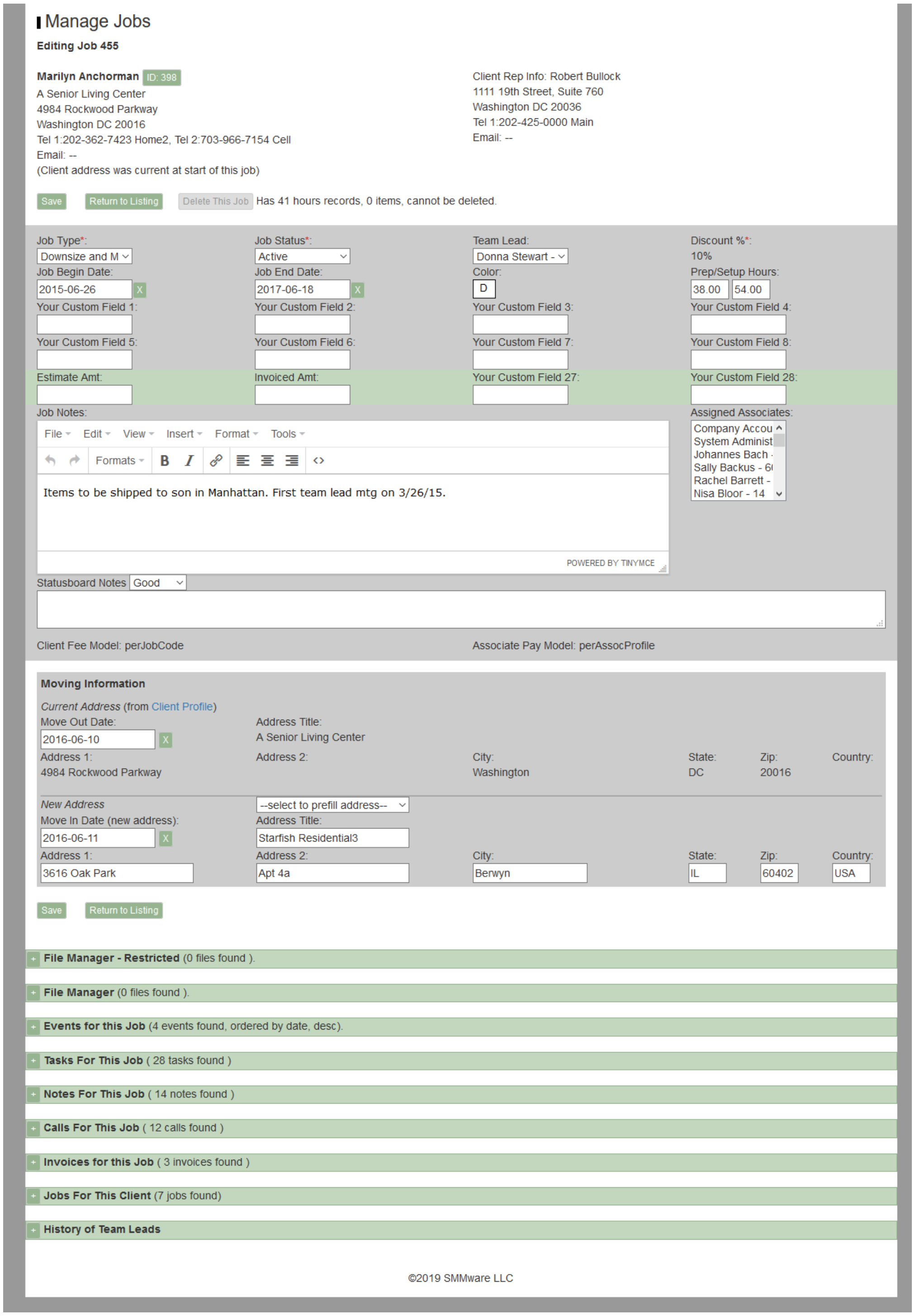
Job Number	Client Name Represented By	Team Lead	Type	Status	Begin Date	End Date	Estimated Preparation	Estimated Setup	Actual Hours	Edit / Delete
467	Ackerman, Marilyn2	Brian3 Hagar	Downsize Only	Active	2015-09-15	0000-00-00	5.00	5.00		Edit Delete
469	Ackerman, Marilyn2	Brian3 Hagar	Floor Plan Only	Active	2015-09-15	0000-00-00	0.00	0.00		Edit Delete
466	Ackerman, Marilyn2		Handyman Services	Active	2015-09-01	2015-09-05	10.00	10.00		Edit Delete
468	Ackerman, Marilyn2	Donna Stewart	In Home Services	Active	2015-09-15	0000-00-00	0.00	0.00		Edit Delete

To add a new job, use the button in the upper right, “Create a new job”. First, select a client from the dropdown directly to the left of the button.



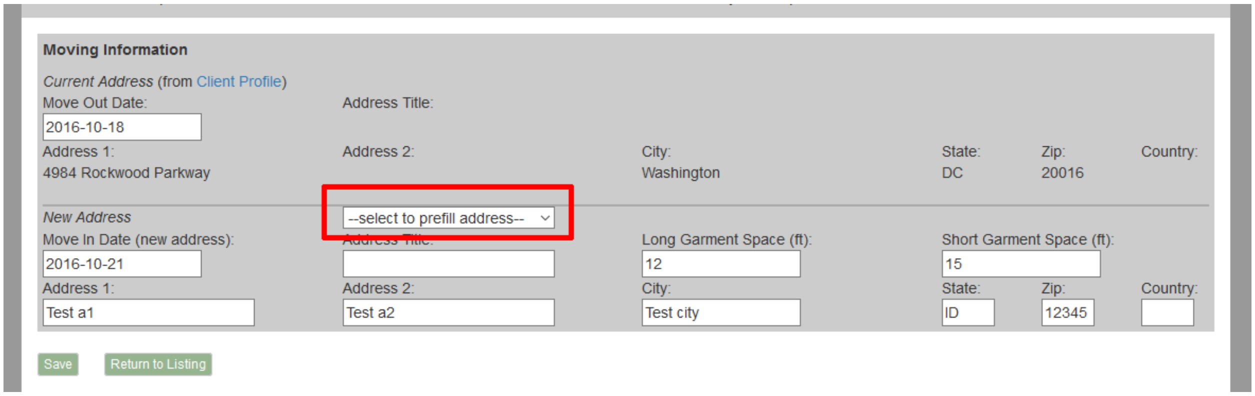
Job Number	Client Name Represented By	Team Lead	Type	Status	Begin Date	End Date	Estimated Preparation	Estimated Setup	Actual Hours	Edit / Delete
467	Ackerman, Marilyn2	Brian3 Hagar	Downsize Only	Active	2015-09-15	0000-00-00	5.00	5.00		Edit Delete
469	Ackerman, Marilyn2	Brian3 Hagar	Floor Plan Only	Active	2015-09-15	0000-00-00	0.00	0.00		Edit Delete
466	Ackerman, Marilyn2		Handyman Services	Active	2015-09-01	2015-09-05	10.00	10.00		Edit Delete
468	Ackerman, Marilyn2	Donna Stewart	In Home Services	Active	2015-09-15	0000-00-00	0.00	0.00		Edit Delete

A job cannot be deleted once it has hours/expense/mileage entries applied to it, the delete button is greyed out.



If any of the ‘New Address’ address fields have text in them, the system assumes this job involves moving, and this job will be part of the client’s Address History. If every address field is completely blank, this job will not appear in the Address History.

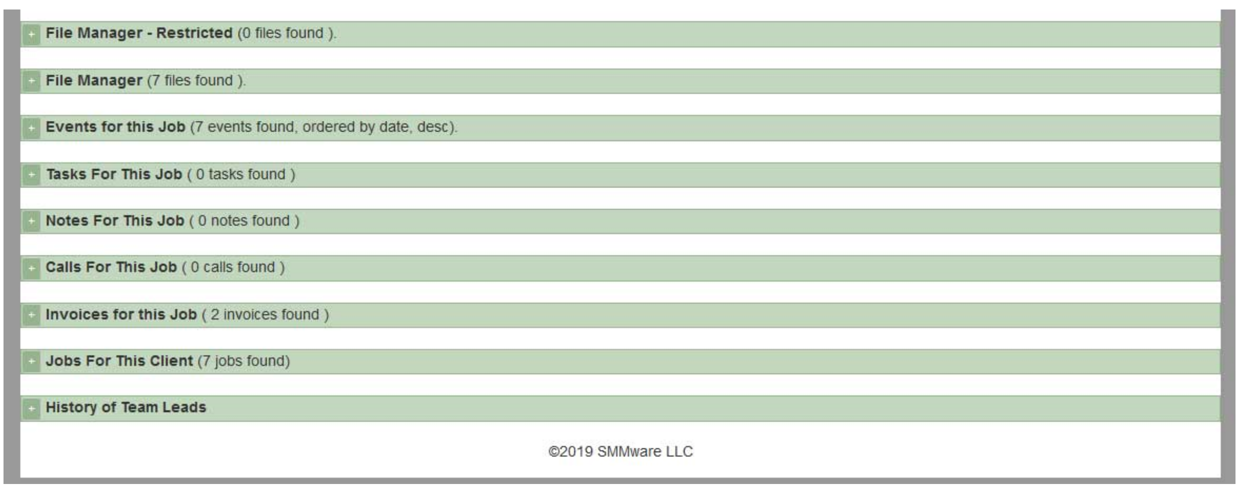
If you work with the same locations (such as Senior Living Communities) regularly, you can save time in entering the address. There is a dropdown ‘select to prefill address’ which will pull in the address of the location, autofilling the address fields for this job. One or more categories within Organizations can be configured to populate this dropdown.



For the Team Lead dropdown, the system keeps a history of any changes to this setting.

The Invoicing process involves approval by the Team Lead. For that, whoever is the current team lead will be the approver. There is an expectation that the previous Team Lead will pass on any relevant information about who actually worked a job to the new Team Lead.

At the bottom of a job profile are familiar sections, File manager, Tasks, Notes, and Calls. New sections are “Events for this Job”, which provides a list of any events that are tagged for this job. There are also sections that list invoices for this job, that list jobs for this client, and list the history of team leads. To manage the section ‘File Manager – Restricted’, the user must have ‘Read/Write’ privileges for the Sales Role.



Expenses, Marking Up

If you are an admin user, you can set a standard percentage for marking up expenses in the Settings Editor, Section 2. Expenses will automatically be marked up when they are entered. You can also directly set the marked-up amount (not via a percentage) by editing any given expense.

Tasks/Notes/Calls and Homepage Sections

An Admin User can edit and delete Tasks/Calls created by others, compared to a Basic User who can only view items unless the item was created by them or assigned to them.

Sections for Tasks, Notes, and Calls can be found under Sales Lead, Clients, Jobs, Organizations, and Contacts. See the Basic User manual for an introduction to Tasks Notes, and Calls.

	Watch our YouTube video about Tasks, Calls, and Notes at https://youtu.be/qIQkCcs6V_s (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)

Homepage Sections

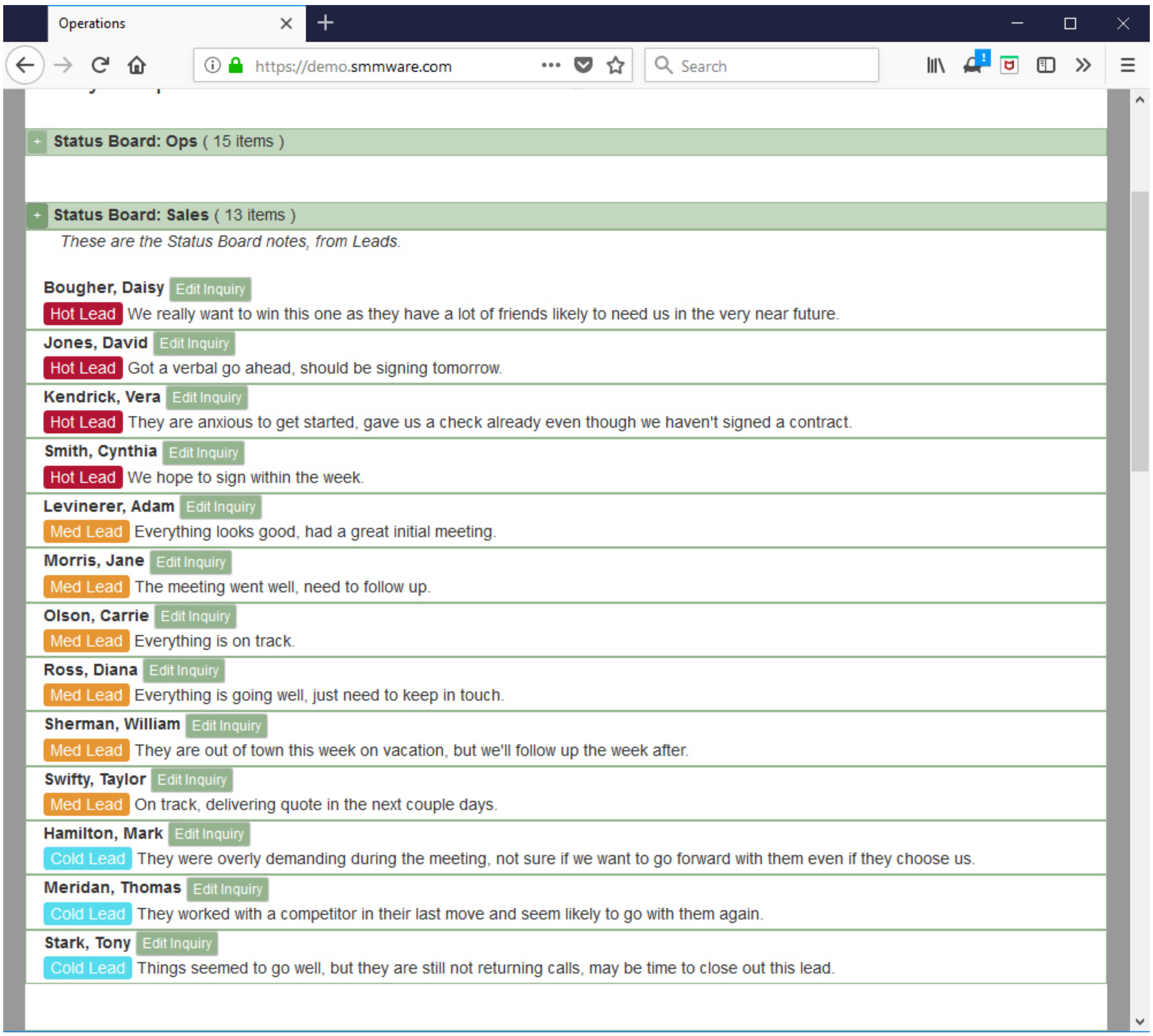
We'll only discuss sections that are unique to admins.

The Status Boards

There are two status boards, one for ops and one for sales. The color coding makes it easy to take in status at a glance and lets you gauge the health of your company for sales or ops.

Status Board – Sales

On the homepage, you now get a list of all open Sales Leads, each with a color coded icon categorizing how the sales lead is progressing. A quick scan down the list tells you at a glance the health of your sales pipeline. The status/description are pulled from the Sales Lead Profiles.



Default Icons:

1) Red, and reads "Hot Lead"

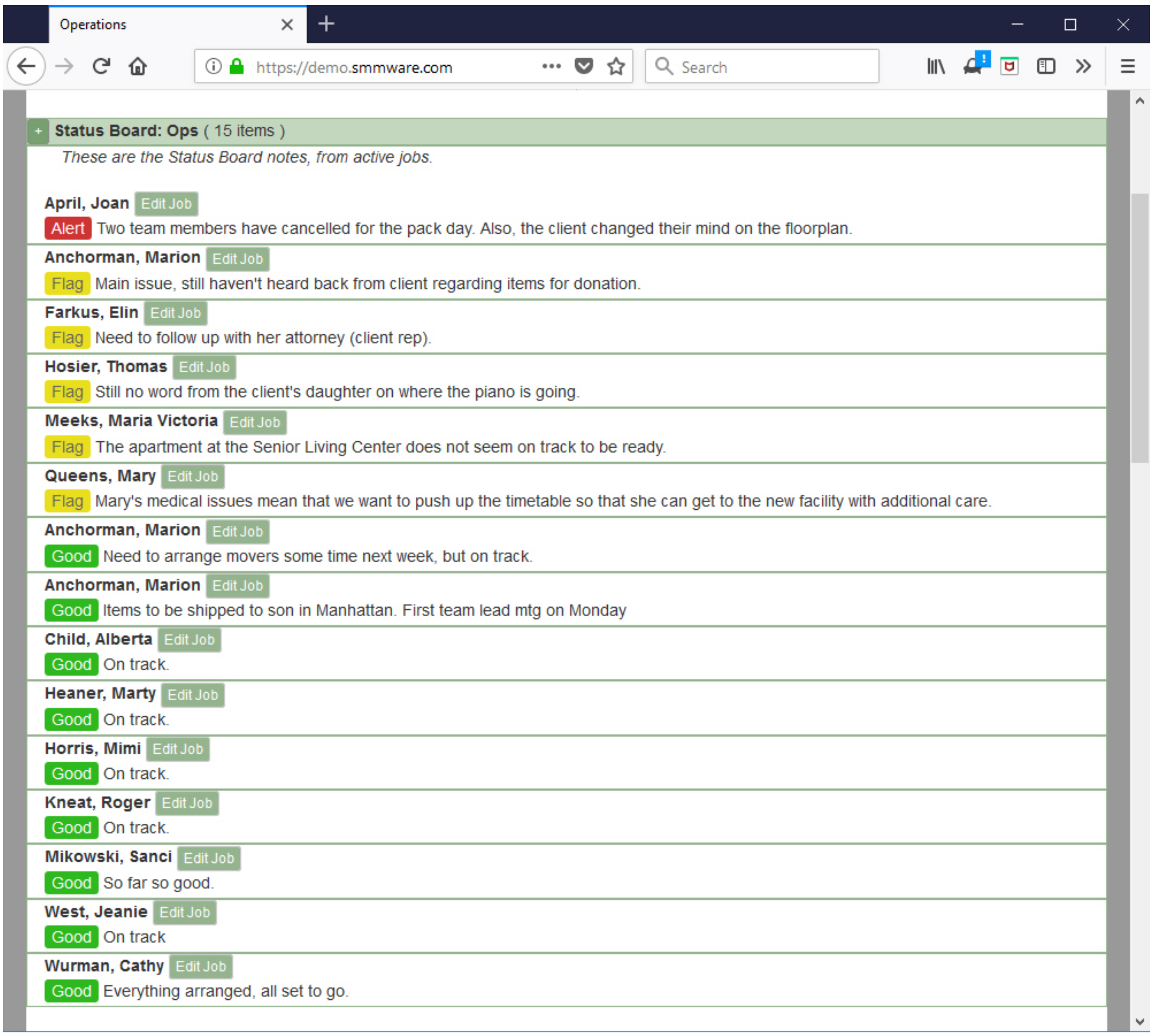
2) Orange, and reads "Reg Lead"

3) Ice blue, and reads "Cold Lead"

Each item also gets a short description of how things are going with this Sales Lead. The icon and text are set in each Sales Lead Profile.

The number of icons, their labels, and their colors CAN ALL BE CUSTOMIZED for your SMMware installation.

Status Board – Jobs



Default Icons:

1) Green, and reads "Good"

2) Yellow, and reads "Flag"

3) Red, and reads "Alert"

As with the SALES STATUS BOARD, the icons can be customized here as well.

More ideas for Sales icons

The default SALES ICON scheme above is based on the likelihood of winning the work. If instead you want an approach based on timing...

1) Red icon, reads "Behind"

2) Orange icon, reads "On Track"

3) Green icon, reads "Quote Sent"

Or based on Sales Stages

1) Light green icon, reads "Met With"

2) Slightly darker green icon, reads "Gathering Info"

3) Medium green icon, reads "Quote Sent"

4) Dark green icon, reads "Job Won!"

You can even have all of the above icons available, combining approaches. It is up to you!

By default, higher level users see the Status Boards, but who can see them is also configurable.

Referring Contacts, 10 Most Stale

These are contacts who refer business to you (Have the field “Refers Business to Us” checkmarked in their Contact Profile), starting with the one you haven’t contacted for the longest time. The intention is to help you avoid losing track of them until you realize they haven’t sent you any business lately.

10 Clients, Willing to Act as Reference

This list has clients whose “Act as reference” field is set to “Yes”. This section is where you go when on a sales call and someone asks for references.

10 Client to Ask, to Act as Reference

This section lists clients with closed jobs who have their “Act As Reference” field set to “Unasked” in their client profile. The intention is to help you keep a large number of clients who you can ask to serve as a reference.

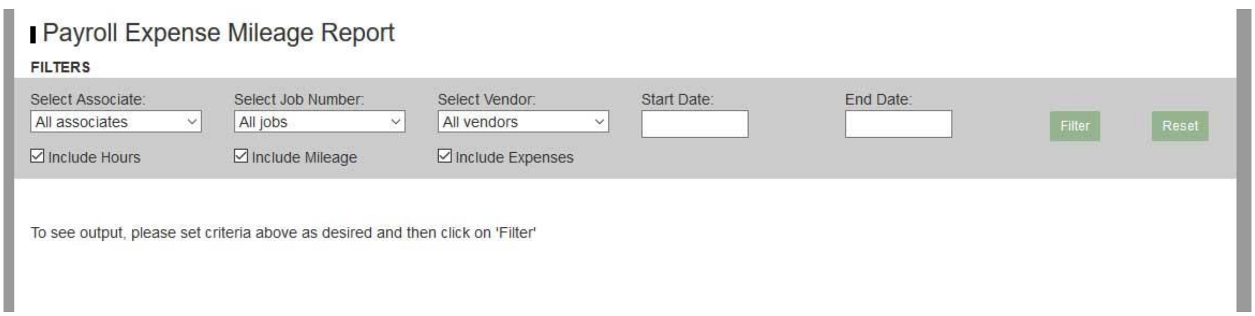
The Admin menu

Basic Users may see an ‘Admin’ entry in the menu bar but only if they have access to the Calendar (or the system can be configured to limit Basic Users to their personal calendar on the homepage).

Payroll Expense Mileage Report

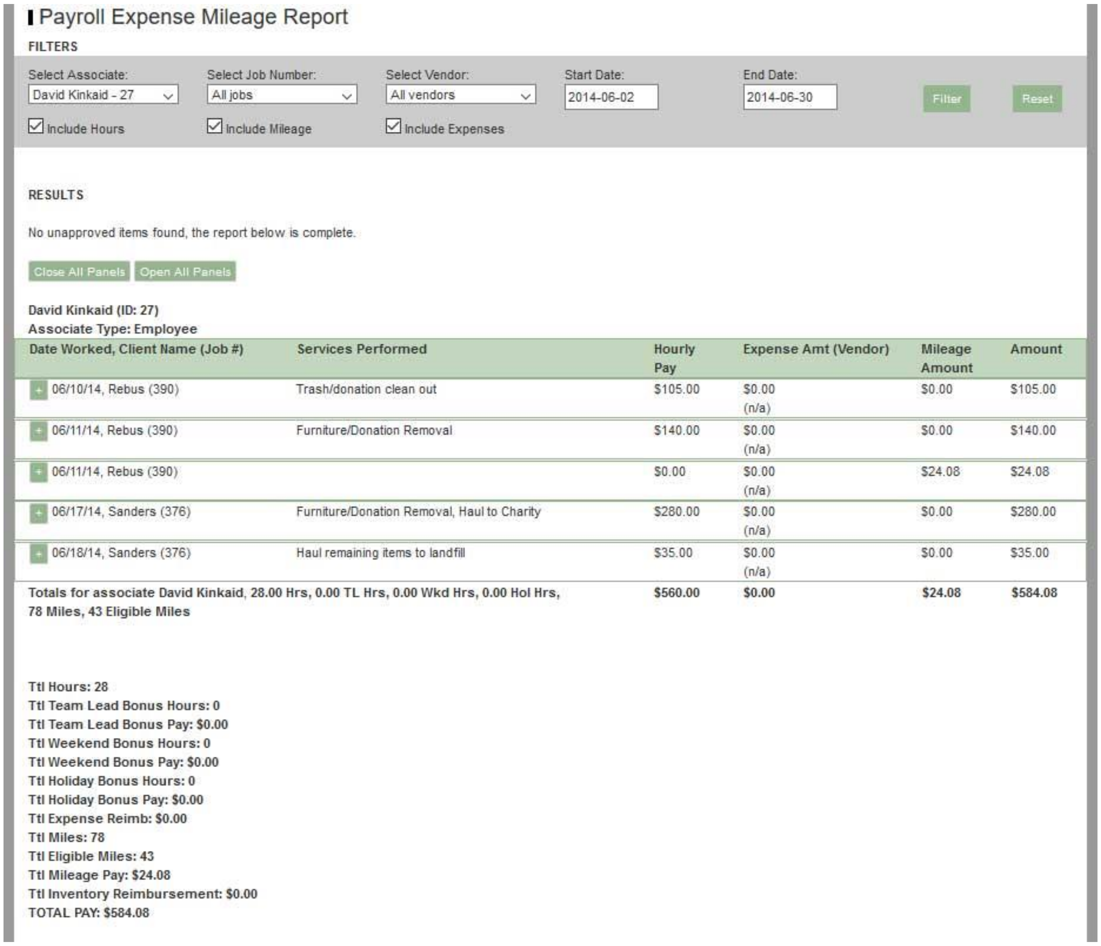
This report provides you with hours, rate, and totals information that can be a basis for issuing paychecks. Your separate payroll system is assumed to address withholding for benefits or taxes, the information provided here serves as the starting point.

At the top of the screen, you start by indicating which associates, jobs, and dates are to be included in the report using the Filters.



After filtering, the bottom of the screen provides tables of information for each associate.

The ’+’ sign buttons at the left of each row allow you to expand that row to see additional detail.



Payroll Expense Mileage Report

FILTERS

Select Associate: David Kinkaid - 27
Select Job Number: All jobs
Select Vendor: All vendors
Start Date: 2014-06-02
End Date: 2014-06-30
Filter
Reset

☑ Include Hours ☑ Include Mileage ☑ Include Expenses

RESULTS

No unapproved items found, the report below is complete.

Close All Panels
Open All Panels

David Kinkaid (ID: 27)
Associate Type: Employee

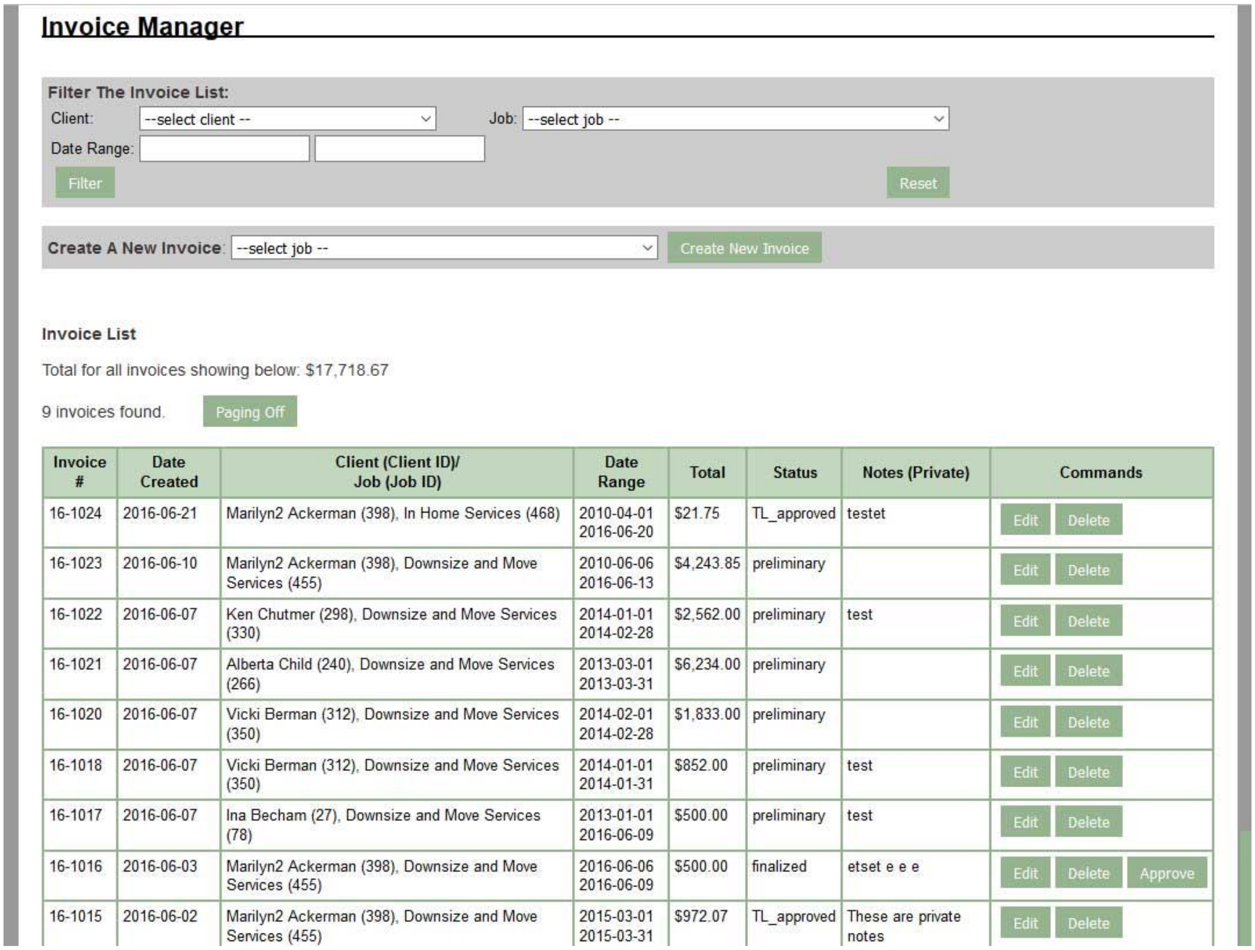
Date Worked, Client Name (Job #)	Services Performed	Hourly Pay	Expense Amt (Vendor)	Mileage Amount	Amount
+ 06/10/14, Rebus (390)	Trash/donation clean out	$105.00	$0.00 (n/a)	$0.00	$105.00
+ 06/11/14, Rebus (390)	Furniture/Donation Removal	$140.00	$0.00 (n/a)	$0.00	$140.00
+ 06/11/14, Rebus (390)		$0.00	$0.00 (n/a)	$24.08	$24.08
+ 06/17/14, Sanders (376)	Furniture/Donation Removal, Haul to Charity	$280.00	$0.00 (n/a)	$0.00	$280.00
+ 06/18/14, Sanders (376)	Haul remaining items to landfill	$35.00	$0.00 (n/a)	$0.00	$35.00
Totals for associate David Kinkaid, 28.00 Hrs, 0.00 TL Hrs, 0.00 Wkd Hrs, 0.00 Hol Hrs, 78 Miles, 43 Eligible Miles		**$560.00**	**$0.00**	**$24.08**	**$584.08**

Ttl Hours: 28
Ttl Team Lead Bonus Hours: 0
Ttl Team Lead Bonus Pay: $0.00
Ttl Weekend Bonus Hours: 0
Ttl Weekend Bonus Pay: $0.00
Ttl Holiday Bonus Hours: 0
Ttl Holiday Bonus Pay: $0.00
Ttl Expense Reimb: $0.00
Ttl Miles: 78
Ttl Eligible Miles: 43
Ttl Mileage Pay: $24.08
Ttl Inventory Reimbursement: $0.00
TOTAL PAY: $584.08

Invoice Manager

YouTube	Watch our YouTube video about the Invoice Manager at https://youtu.be/vaQ2VNwLHkQ (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)

We'll begin the discussion of the Invoice Manager with the listing screen, shown below.



Invoice Manager

Filter The Invoice List:

Client: --select client --   Job: --select job --

Date Range:

Filter   Reset

Create A New Invoice: --select job --   Create New Invoice

Invoice List

Total for all invoices showing below: $17,718.67

9 invoices found.   Paging Off

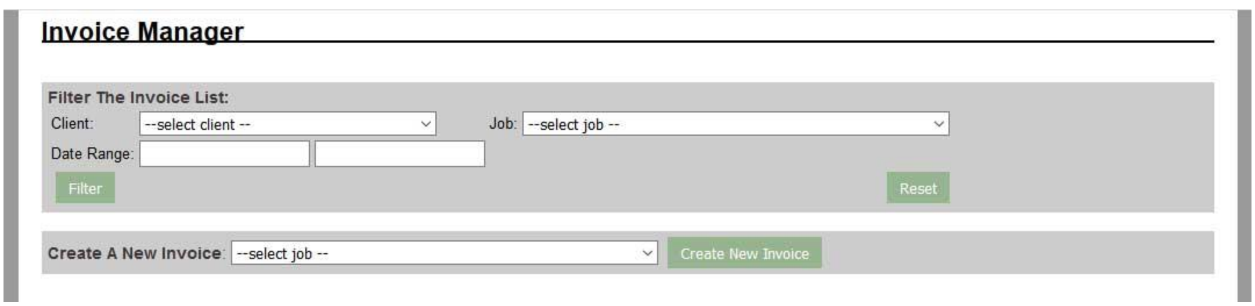
Invoice #	Date Created	Client (Client ID)/ Job (Job ID)	Date Range	Total	Status	Notes (Private)	Commands
16-1024	2016-06-21	Marilyn2 Ackerman (398), In Home Services (468)	2010-04-01 2016-06-20	$21.75	TL_approved	testet	Edit Delete
16-1023	2016-06-10	Marilyn2 Ackerman (398), Downsize and Move Services (455)	2010-06-06 2016-06-13	$4,243.85	preliminary		Edit Delete
16-1022	2016-06-07	Ken Chutmer (298), Downsize and Move Services (330)	2014-01-01 2014-02-28	$2,562.00	preliminary	test	Edit Delete
16-1021	2016-06-07	Alberta Child (240), Downsize and Move Services (266)	2013-03-01 2013-03-31	$6,234.00	preliminary		Edit Delete
16-1020	2016-06-07	Vicki Berman (312), Downsize and Move Services (350)	2014-02-01 2014-02-28	$1,833.00	preliminary		Edit Delete
16-1018	2016-06-07	Vicki Berman (312), Downsize and Move Services (350)	2014-01-01 2014-01-31	$852.00	preliminary	test	Edit Delete
16-1017	2016-06-07	Ina Becham (27), Downsize and Move Services (78)	2013-01-01 2016-06-09	$500.00	preliminary	test	Edit Delete
16-1016	2016-06-03	Marilyn2 Ackerman (398), Downsize and Move Services (455)	2016-06-06 2016-06-09	$500.00	finalized	etset e e e	Edit Delete Approve
16-1015	2016-06-02	Marilyn2 Ackerman (398), Downsize and Move Services (455)	2015-03-01 2015-03-31	$972.07	TL_approved	These are private notes	Edit Delete

At the top of the screen is a filters section. Normally, all invoices that have been entered in the system are returned, although you will only see one screen's worth at a time. You can set the 'client' and 'job' dropdowns as well as a date range in order to limit the invoices selected.

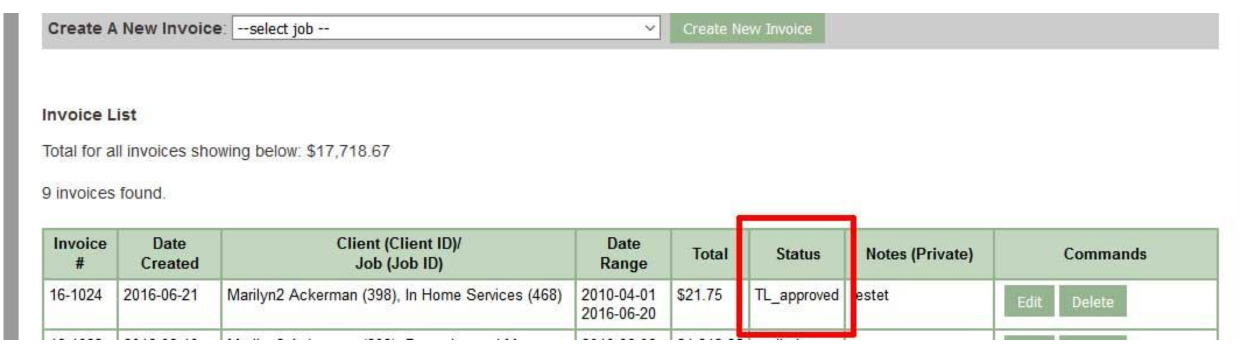
The total value of the invoices shown on the screen is included. If there are more items than fit on one page such that paging is activated, the total is just for what is on this one page. If you want to see the total for all items, you can use the "Paging Off" button. As the name implies, all items will be shown on one page and the total will then include all of the invoices presently selected (based on the filters).

A common usage is in answering the question, what is the total value of invoices sent out in a given month. To answer this question, set the date range. For example: 9/1/2016 – 9/30/2016. Then, if there is more than one page's worth of results, use the "Paging Off" button. At this point, the total will reflect the invoices sent out in that month.

The filters section:



The screenshot below shows a typical line item from the listing screen, for a single invoice. The red highlighting shows a status of TL_approved, short for "Team Leader Approved".



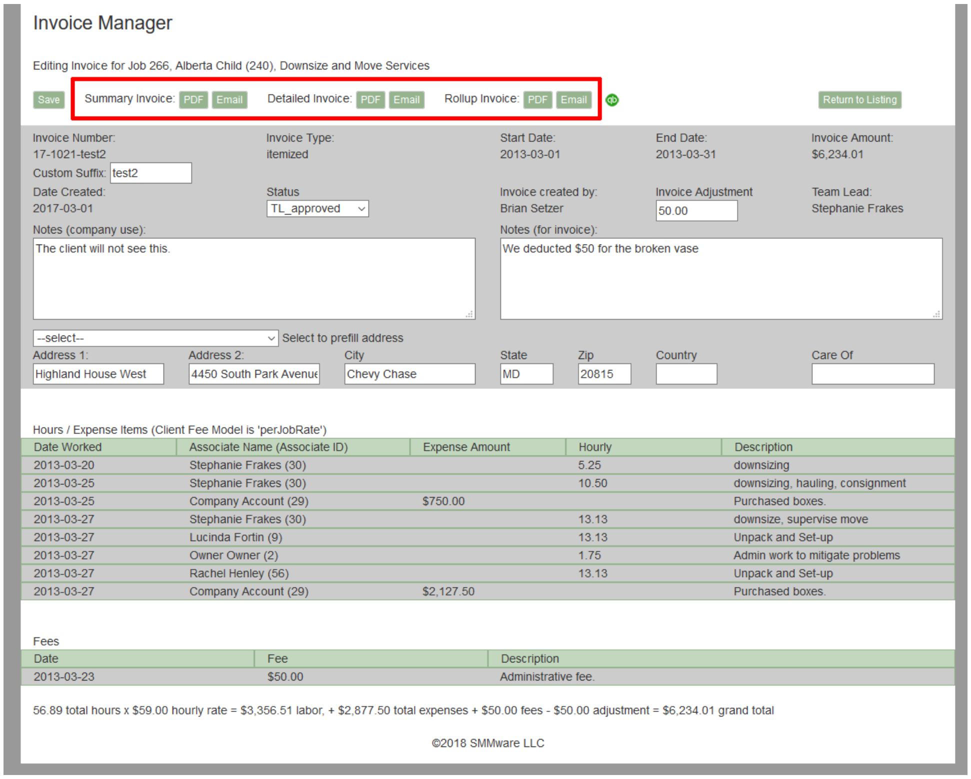
The invoicing system includes an approval process to help you ensure that the client receives an accurate invoice.

When an invoice is first created, it will have a status of “Preliminary”. Sometimes you might want to create an invoice just to get a running total to date, something of a scratchpad. Assigning the status level of “Preliminary” is a way of letting others know that this invoice is not yet ready to be sent to a client, or for approval. Once you, the invoice creator, are satisfied that the invoice is complete, the status should be changed to “Finalized” so that the Team Leader knows they can approve it.

When an invoice has a status of “Finalized” it’s line item on the Listing Screen will include the Approve button. The button appears for the relevant Team Leader. To handle unforeseen circumstances (Sometimes the Team Leader is unavailable for approval but you as an Administrative level user are confident that it is correct) the Approve button also appears for Administrative Users.

16-1018	2016-06-07	Vicki Berman (312), Downsize and Move Services (350)	2014-01-01 2014-01-31	$852.00	preliminary	test	Edit Delete
16-1017	2016-06-07	Ina Becham (27), Downsize and Move Services (78)	2013-01-01 2016-06-09	$500.00	preliminary	test	Edit Delete
16-1016	2016-06-03	Marilyn2 Ackerman (398), Downsize and Move Services (455)	2016-06-06 2016-06-09	$500.00	finalized	etset e e e	Edit Delete Approve
16-1015	2016-06-02	Marilyn2 Ackerman (398), Downsize and Move Services (455)	2015-03-01 2015-03-31	$972.07	TL_approved	These are private notes	Edit Delete

Once the invoice has been approved, it will have a status of “TL_approved”. At this point, the detail view for that invoice will include the “PDF” and “Email” buttons for the formats “Summary”, “Detail”, and “Rollup”. Clicking the PDF button generates a PDF of the invoice which you can save to your hard drive for separate storage or printing. The email button sends an email to the client with the PDF as an attachment. If you do not use a particular format (Summary/Detail/Rollup), you can ask for it to be hidden in the configuration.



Invoice Manager

Editing Invoice for Job 266, Alberta Child (240), Downsize and Move Services

Save | Summary Invoice: PDF Email | Detailed Invoice: PDF Email | Rollup Invoice: PDF Email | Return to Listing

Invoice Number: 17-1021-test2
Custom Suffix: test2
Invoice Type: itemized
Start Date: 2013-03-01
End Date: 2013-03-31
Invoice Amount: $6,234.01
Date Created: 2017-03-01
Status: TL_approved
Invoice created by: Brian Setzer
Invoice Adjustment: 50.00
Team Lead: Stephanie Frakes
Notes (company use): The client will not see this.
Notes (for invoice): We deducted $50 for the broken vase

--select-- Select to prefill address
Address 1: Highland House West
Address 2: 4450 South Park Avenue
City: Chevy Chase
State: MD
Zip: 20815
Country:
Care Of:

Hours / Expense Items (Client Fee Model is 'perJobRate')

Date Worked	Associate Name (Associate ID)	Expense Amount	Hourly	Description
2013-03-20	Stephanie Frakes (30)		5.25	downsizing
2013-03-25	Stephanie Frakes (30)		10.50	downsizing, hauling, consignment
2013-03-25	Company Account (29)	$750.00		Purchased boxes.
2013-03-27	Stephanie Frakes (30)		13.13	downsize, supervise move
2013-03-27	Lucinda Fortin (9)		13.13	Unpack and Set-up
2013-03-27	Owner Owner (2)		1.75	Admin work to mitigate problems
2013-03-27	Rachel Henley (56)		13.13	Unpack and Set-up
2013-03-27	Company Account (29)	$2,127.50		Purchased boxes.

Fees

Date	Fee	Description
2013-03-23	$50.00	Administrative fee.

56.89 total hours x $59.00 hourly rate = $3,356.51 labor, + $2,877.50 total expenses + $50.00 fees - $50.00 adjustment = $6,234.01 grand total

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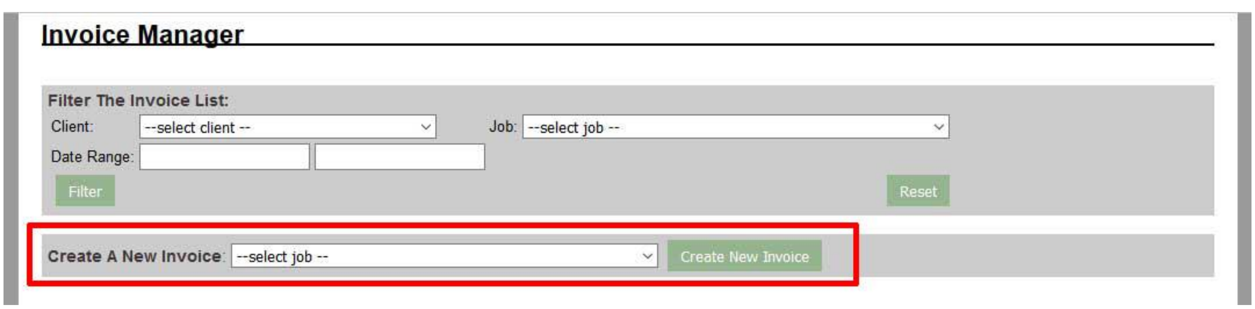
Creating A New Invoice

At the top of the Listing Screen you will find the “Create New Invoice” button. You need to select a job from the dropdown and then click on the button.

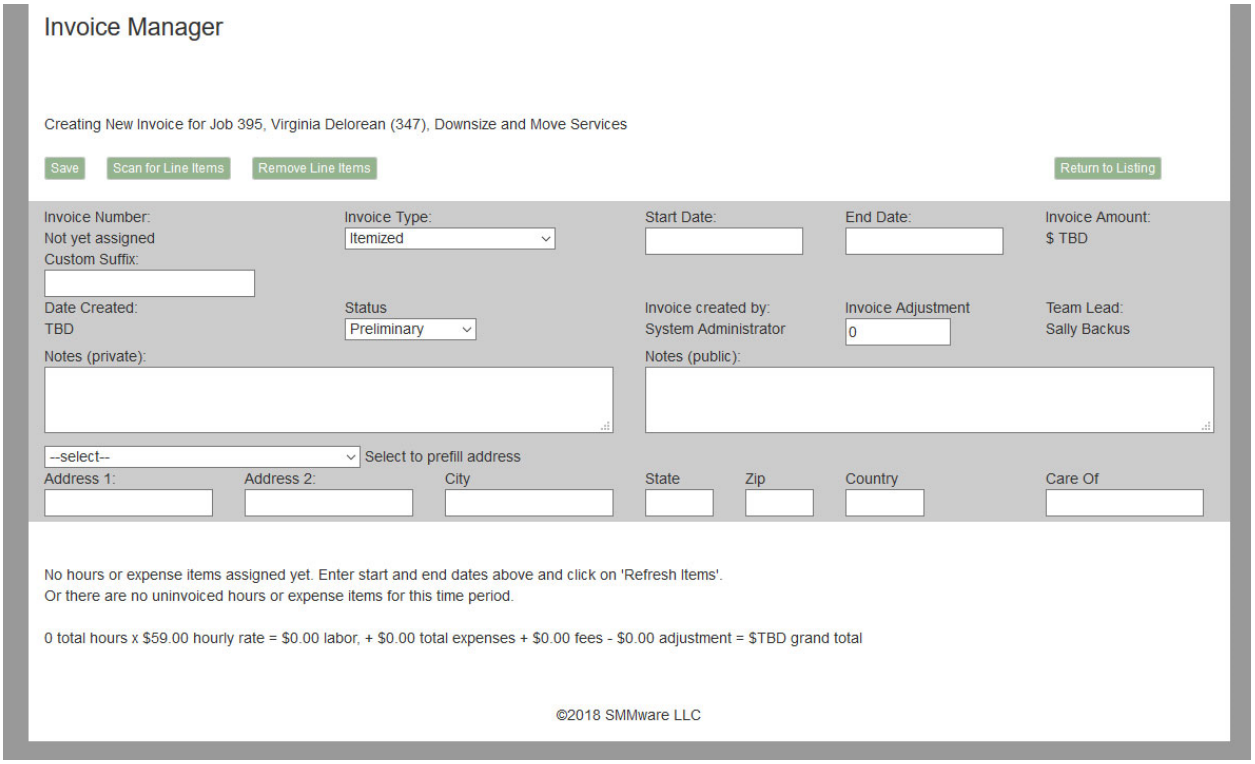


Invoice Manager

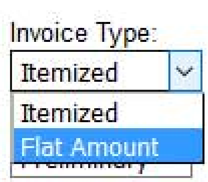
Filter The Invoice List:
Client: --select client --
Job: --select job --
Date Range:
Filter | Reset

Create A New Invoice: --select job -- | Create New Invoice

At that point, you will see a new, blank invoice

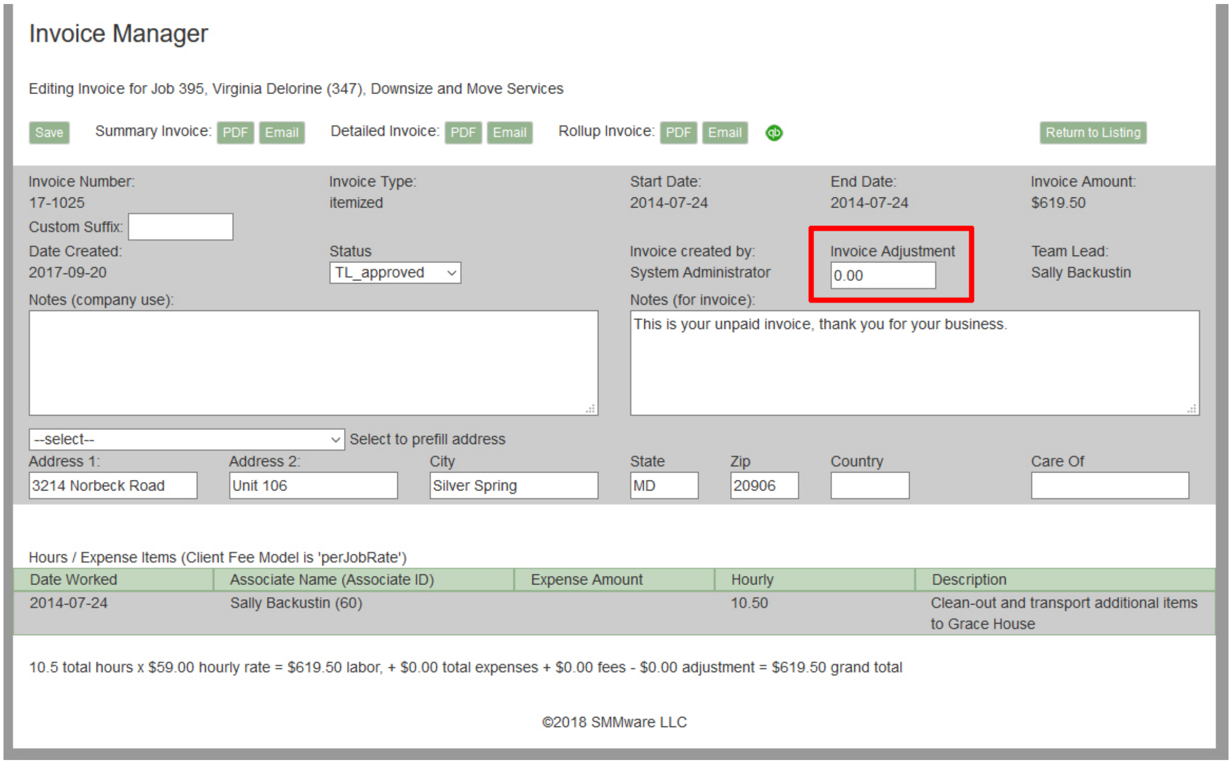


The system supports two types of invoices: Flat Fee and Itemized.

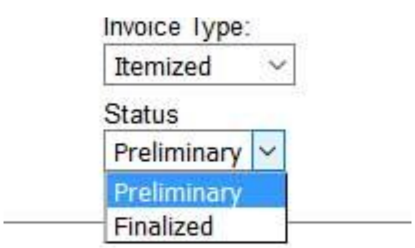


An itemized invoice will consist of hour and expense line items and the invoice total is calculated based on those items. A flat fee invoice consists solely of the dollar amount, and you can enter whatever amount is applicable.

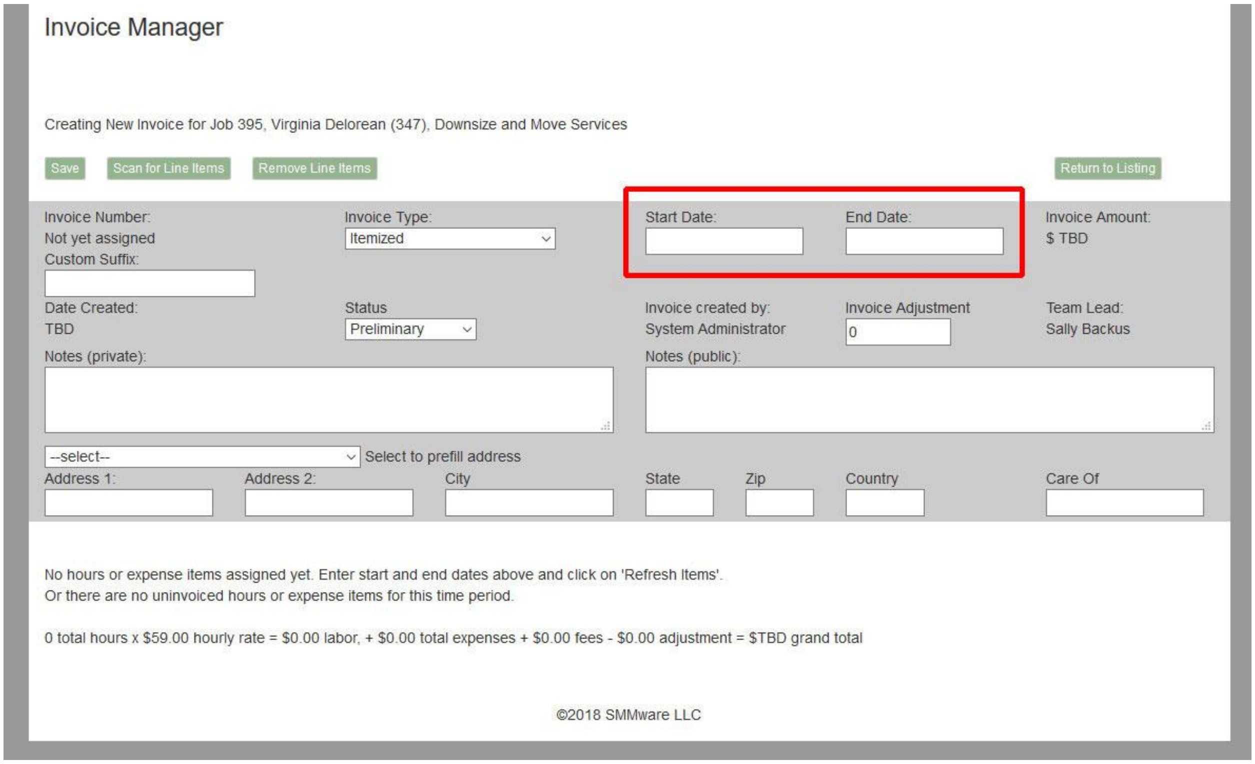
A typical use for a flat fee invoice is for a down payment. Later, when the work is done, you can create an itemized invoice and subtract the down payment using the “Invoice Adjustment” field. You might also mention the reason for the adjustment in the “Public Notes” field to make it clear to the client.



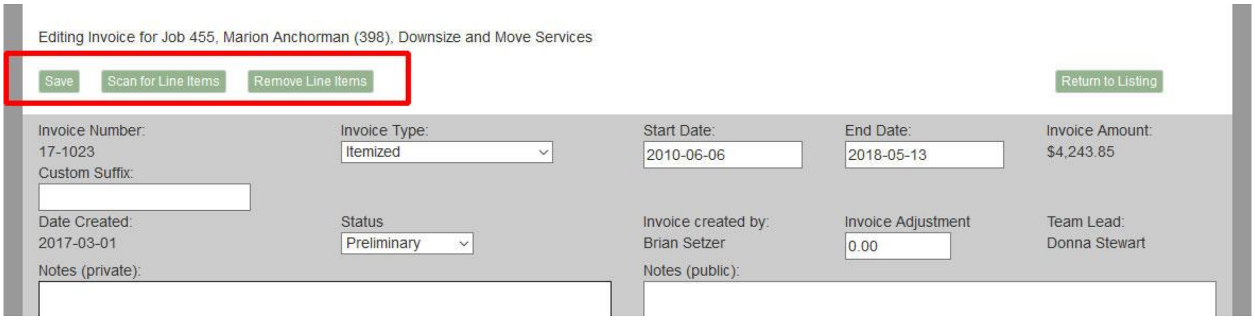
When you first create an invoice, the only values available for the status are “Preliminary” and “Finalized”. This is because the ‘higher’ values are only available after the Team Leader approves the invoice.



To bring hours and mileage entries into the invoice, you will first set a date range. The date range will be compared to the ‘date worked’ field for the hours and mileage entries created using the “Record My Hours/Expenses/Mileage” command under the “Associates” menu.


Invoice Manager
Creating New Invoice for Job 395, Virginia Delorean (347), Downsize and Move Services
Save
Scan for Line Items
Remove Line Items
Return to Listing
Invoice Number:
Not yet assigned
Custom Suffix:
Invoice Type:
Itemized
Start Date:
End Date:
Invoice Amount:
$ TBD
Date Created:
TBD
Status
Preliminary
Invoice created by:
System Administrator
Invoice Adjustment
0
Team Lead:
Sally Backus
Notes (private):
Notes (public):
--select--
Select to prefill address
Address 1:
Address 2:
City
State
Zip
Country
Care Of
No hours or expense items assigned yet. Enter start and end dates above and click on 'Refresh Items'.
Or there are no uninvoiced hours or expense items for this time period.
0 total hours x $59.00 hourly rate = $0.00 labor, + $0.00 total expenses + $0.00 fees - $0.00 adjustment = $TBD grand total
©2018 SMMware LLC

Once you have entered the dates, click on the “Scan For Line Items” button, which is how to tell the system to perform the date range check.



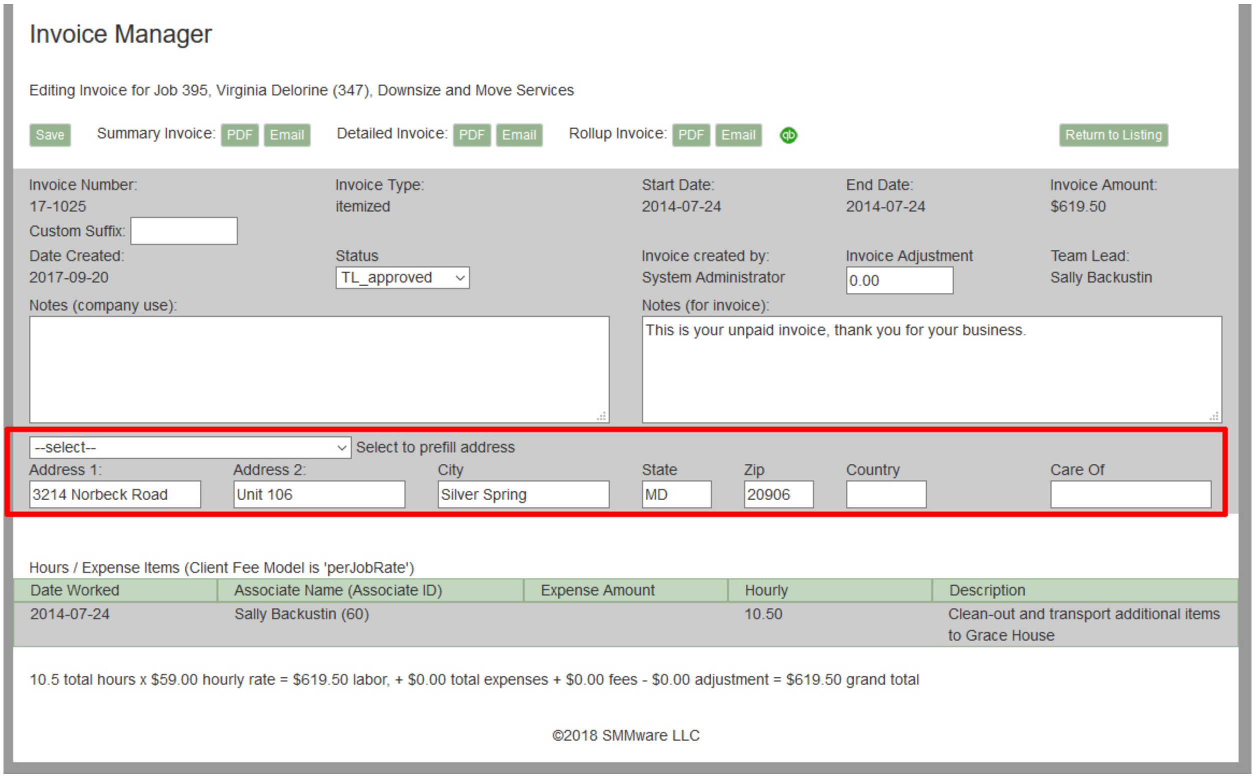
You can use the Scan For Line Items button again if you change the date range, or if you become aware that an associate has created new Hours/Expenses/Mileage entries. At this point, no changes have been made to the database.

Once you are satisfied that you have the right date range, etc. be sure to click ‘Save’. At this point the invoice number will be assigned.

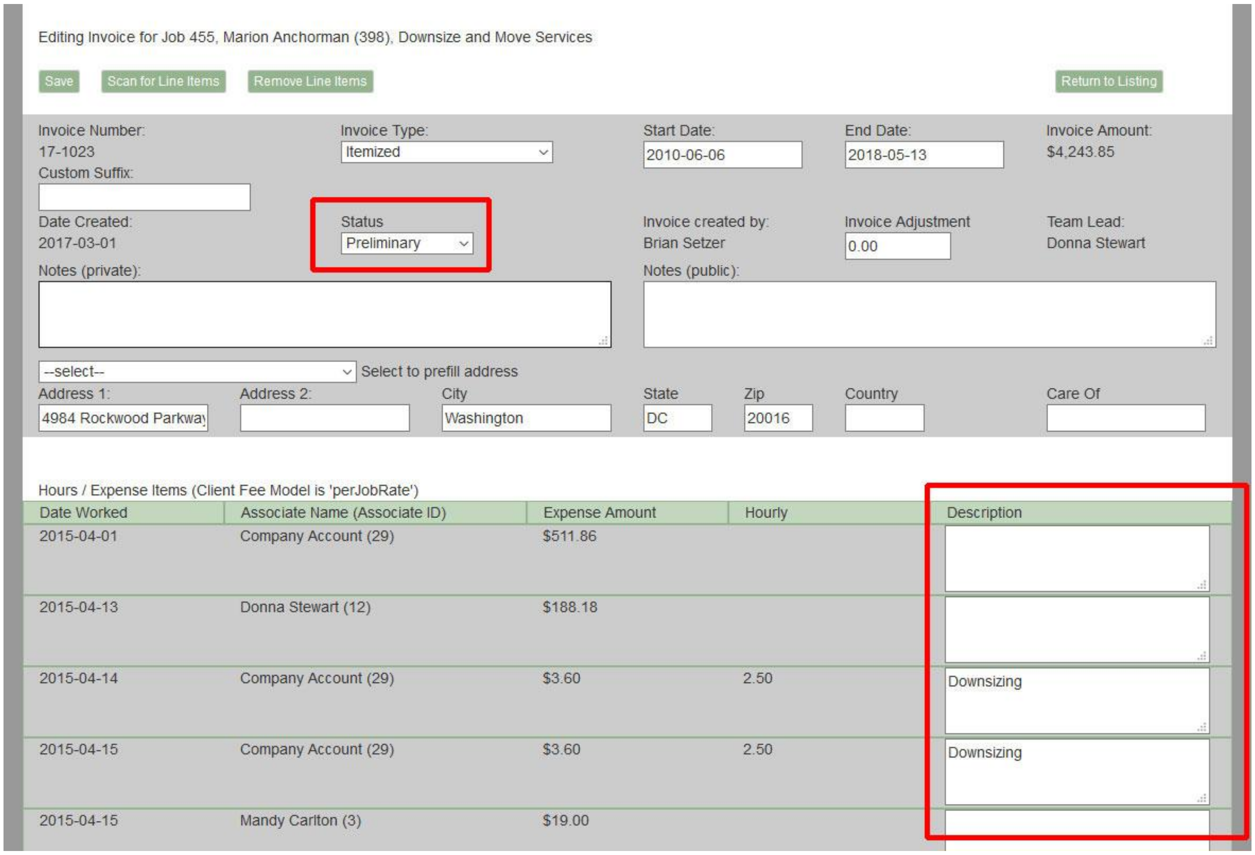
The “Remove Line Items” button is useful when an invoice has already been created and then an Associate remembers they need to alter an hourly entry. The entry is locked since it is part of an invoice. Removing the line items lets you edit the hourly entry. Then you just use the Scan button followed by Save.

You will typically also want to enter notes. The system allows for one 'for invoice' note (which the client will see), and one 'Company use' note (client won't see).

The system keeps track of the client's recent address history, and lets you pick which one to send the invoice to. If the client has a client representative, the representative's address is one of the choices.



On a new invoice, also notice that the description fields for all the Hours/Expenses line items are editable. The information in these fields is pulled from the service descriptions when the Associate created their Hours/Expenses/Mileage data entry. This provides a convenient way to tidy up notes made by Associates for consistency or grammar since the client will see these. Any changes made here will also be seen when going back to the "Record My Hours/Expenses/Mileage" command.



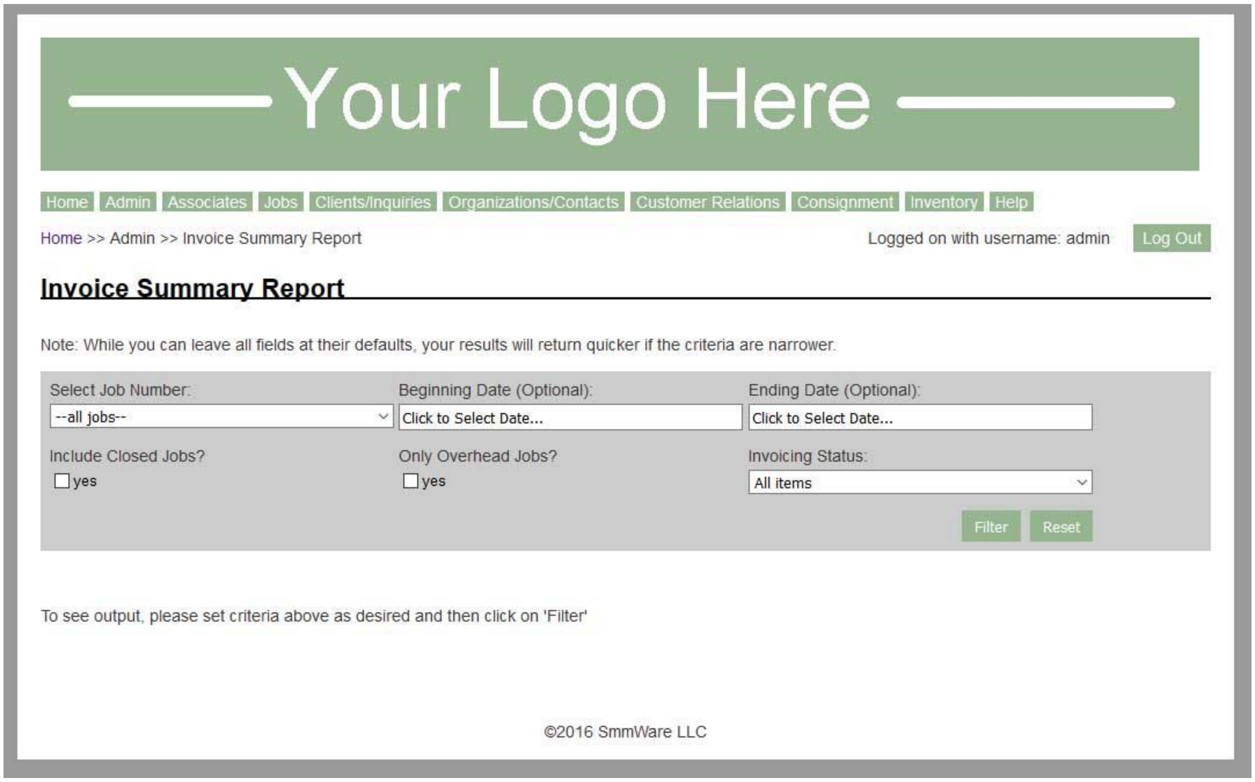
Once you are satisfied with the invoice, you must click the Save button. At that point, the new invoice is assigned an invoice number and entered into the database. If you forget whether or not you've already done the initial save for your invoice, you can tell by looking for an invoice number. If there is an invoice number there, you have. If instead of an invoice number it says "Not yet assigned", you have not.

As part of the process, each entry for Hours/Expenses/Mileage is tagged with the invoice number. This prevents that item from possibly appearing on multiple invoices, unintentionally double billing the client. If you delete the invoice, these items are released so that they can appear on another invoice.

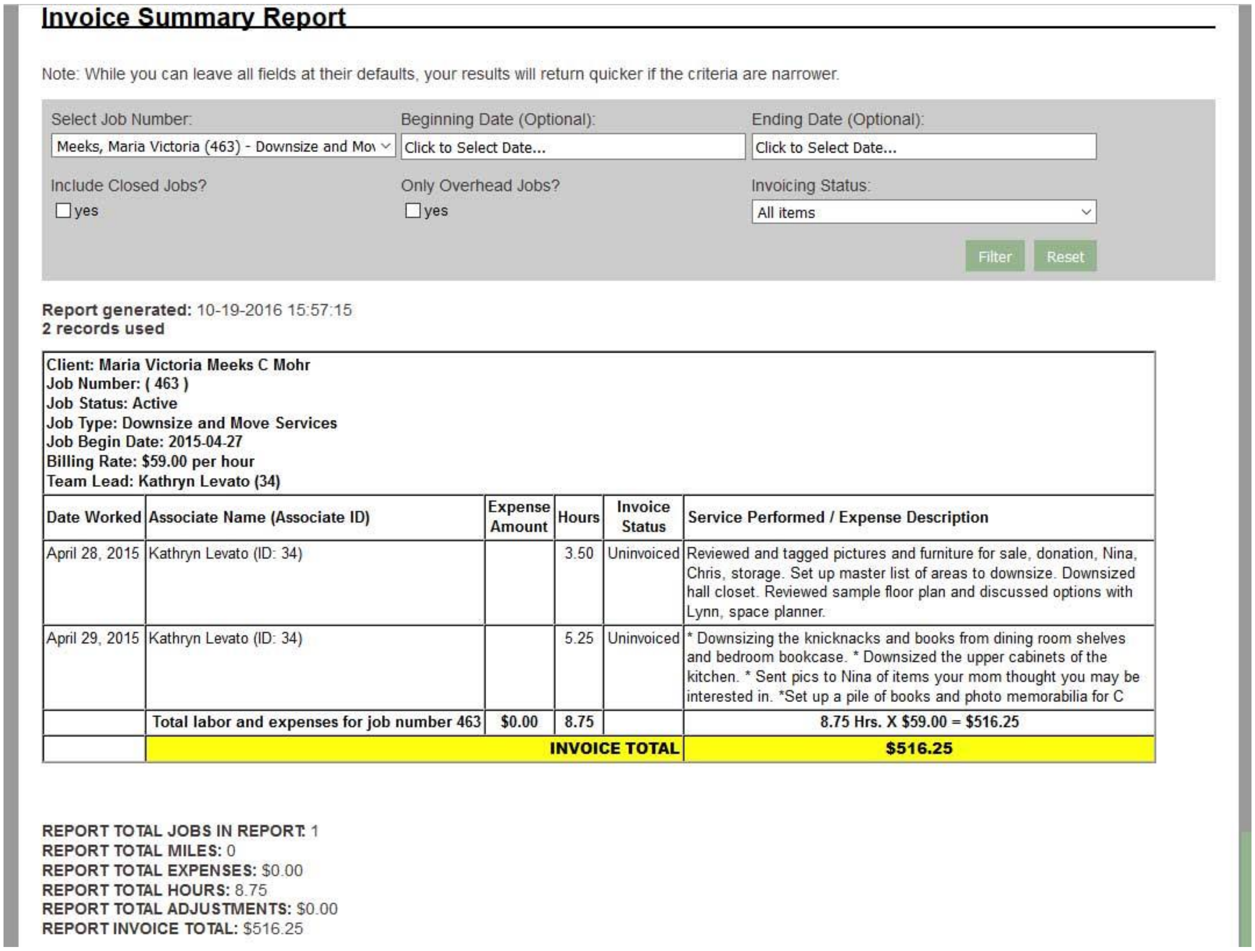
Once an invoice has a status of "Team Leader Approved", you can set the other values for status, such as "Sent to Client", "Overdue", or "Paid".

Invoice Summary Report

The Invoice Summary is not another way to create invoices, but it does play a role in the invoice process. This command can help you verify that all Hours/Expense items have been accounted for.



The Invoicing Status dropdown can be set to “All Items”, “Only Invoiced Items”, or “Only Uninvoiced Items”. Use this in combination with the job and/or Date Range filters to shape the results.



Invoice Summary Report

Note: While you can leave all fields at their defaults, your results will return quicker if the criteria are narrower.

Select Job Number: Meeks, Maria Victoria (463) - Downsize and Mov
Beginning Date (Optional): Click to Select Date...
Ending Date (Optional): Click to Select Date...
Include Closed Jobs? yes
Only Overhead Jobs? yes
Invoicing Status: All items

Filter Reset

Report generated: 10-19-2016 15:57:15
2 records used

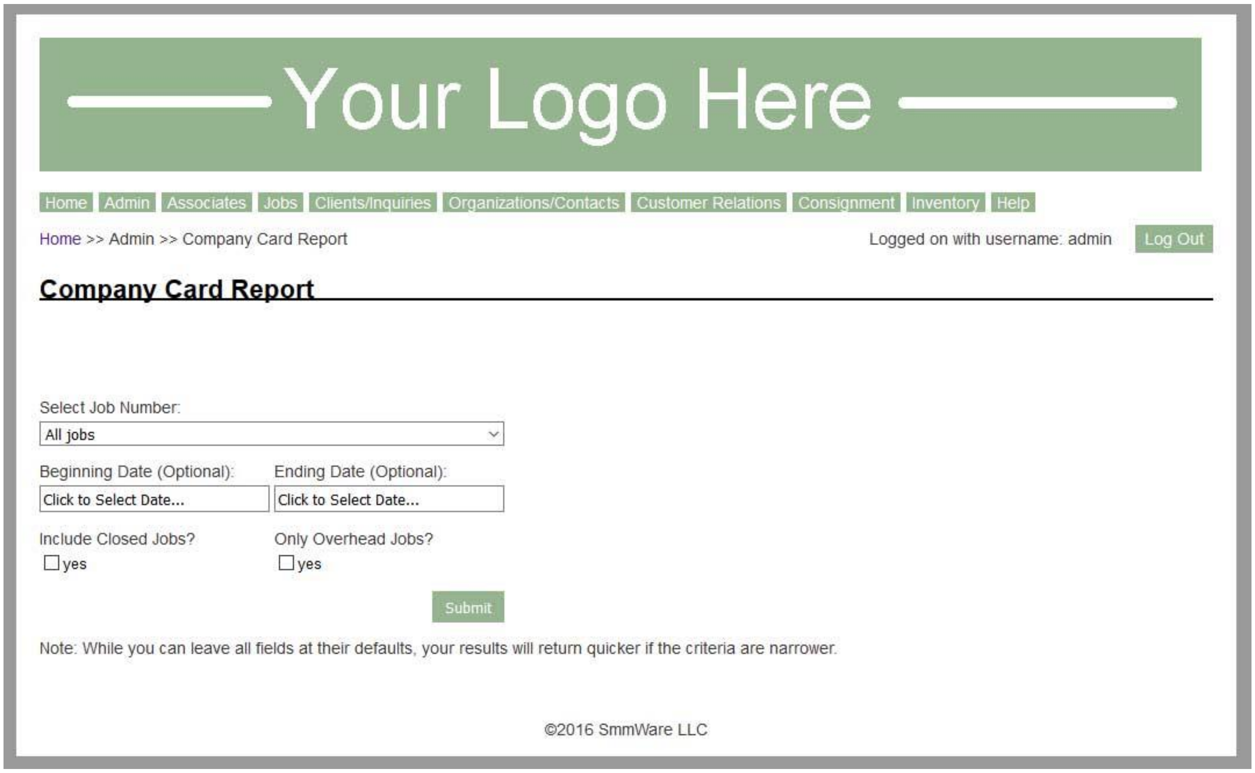
Client: Maria Victoria Meeks C Mohr
Job Number: (463)
Job Status: Active
Job Type: Downsize and Move Services
Job Begin Date: 2015-04-27
Billing Rate: $59.00 per hour
Team Lead: Kathryn Levato (34)

Date Worked	Associate Name (Associate ID)	Expense Amount	Hours	Invoice Status	Service Performed / Expense Description
April 28, 2015	Kathryn Levato (ID: 34)		3.50	Uninvoiced	Reviewed and tagged pictures and furniture for sale, donation, Nina, Chris, storage. Set up master list of areas to downsize. Downsized hall closet. Reviewed sample floor plan and discussed options with Lynn, space planner.
April 29, 2015	Kathryn Levato (ID: 34)		5.25	Uninvoiced	* Downsizing the knicknacks and books from dining room shelves and bedroom bookcase. * Downsized the upper cabinets of the kitchen. * Sent pics to Nina of items your mom thought you may be interested in. *Set up a pile of books and photo memorabilia for C
	Total labor and expenses for job number 463	**$0.00**	**8.75**		**8.75 Hrs. X $59.00 = $516.25**
				INVOICE TOTAL	**$516.25**

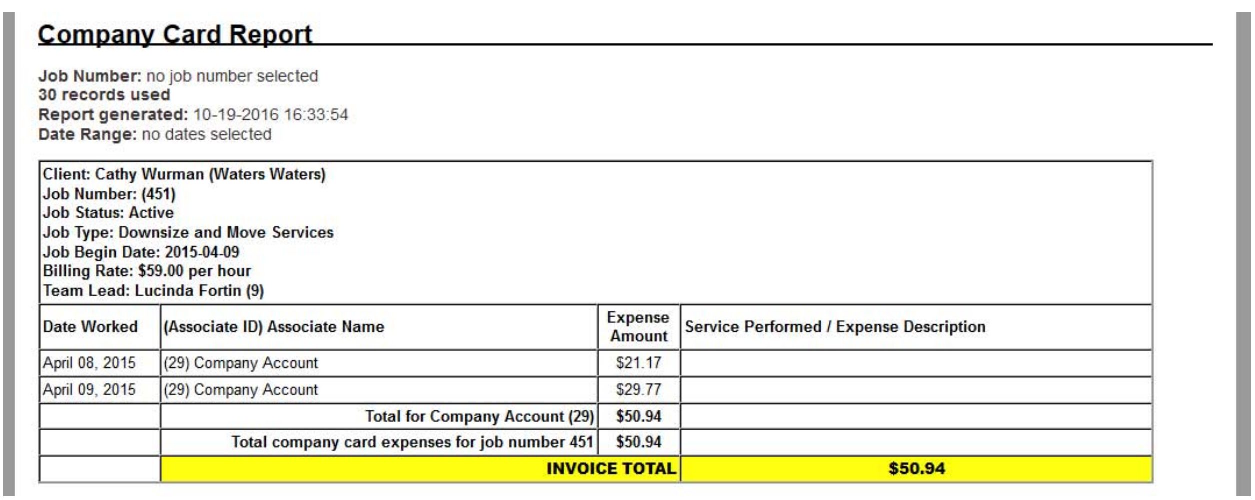
REPORT TOTAL JOBS IN REPORT: 1
REPORT TOTAL MILES: 0
REPORT TOTAL EXPENSES: $0.00
REPORT TOTAL HOURS: 8.75
REPORT TOTAL ADJUSTMENTS: $0.00
REPORT INVOICE TOTAL: $516.25

Company (Credit) Card Report

This report provides summaries regarding usage of the company credit card. As with most reports, the first step is to select one or more filters. In this case, the basic input can include a job number and a date range. You can also indicate whether jobs with a status of 'Closed' should be included (they are normally not). Lastly, you can set the filters to include overhead type jobs.



The output can contain results from more than one job if the "Select Job Number" dropdown was left at "All Jobs" on the first screen.



Company Card Report

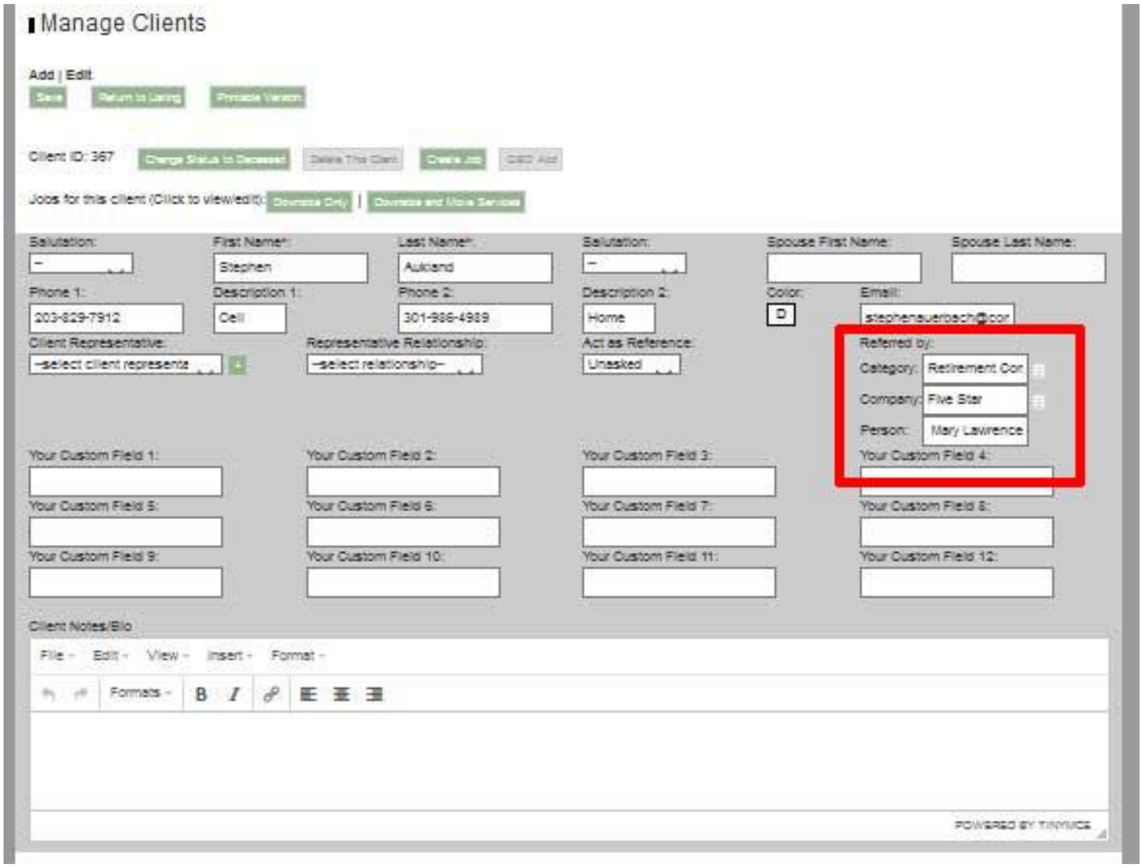
Job Number: no job number selected
30 records used
Report generated: 10-19-2016 16:33:54
Date Range: no dates selected

Client: Cathy Wurman (Waters Waters)
Job Number: (451)
Job Status: Active
Job Type: Downsize and Move Services
Job Begin Date: 2015-04-09
Billing Rate: $59.00 per hour
Team Lead: Lucinda Fortin (9)

Date Worked	(Associate ID) Associate Name	Expense Amount	Service Performed / Expense Description
April 08, 2015	(29) Company Account	$21.17	
April 09, 2015	(29) Company Account	$29.77	
	Total for Company Account (29)	**$50.94**	
	Total company card expenses for job number 451	**$50.94**	
	INVOICE TOTAL		**$50.94**

Referrals Report

The Referrals Report is a Sales/Marketing Tool. When you sign a new client, you should ask them how they found out about you. The client profile contains three fields:

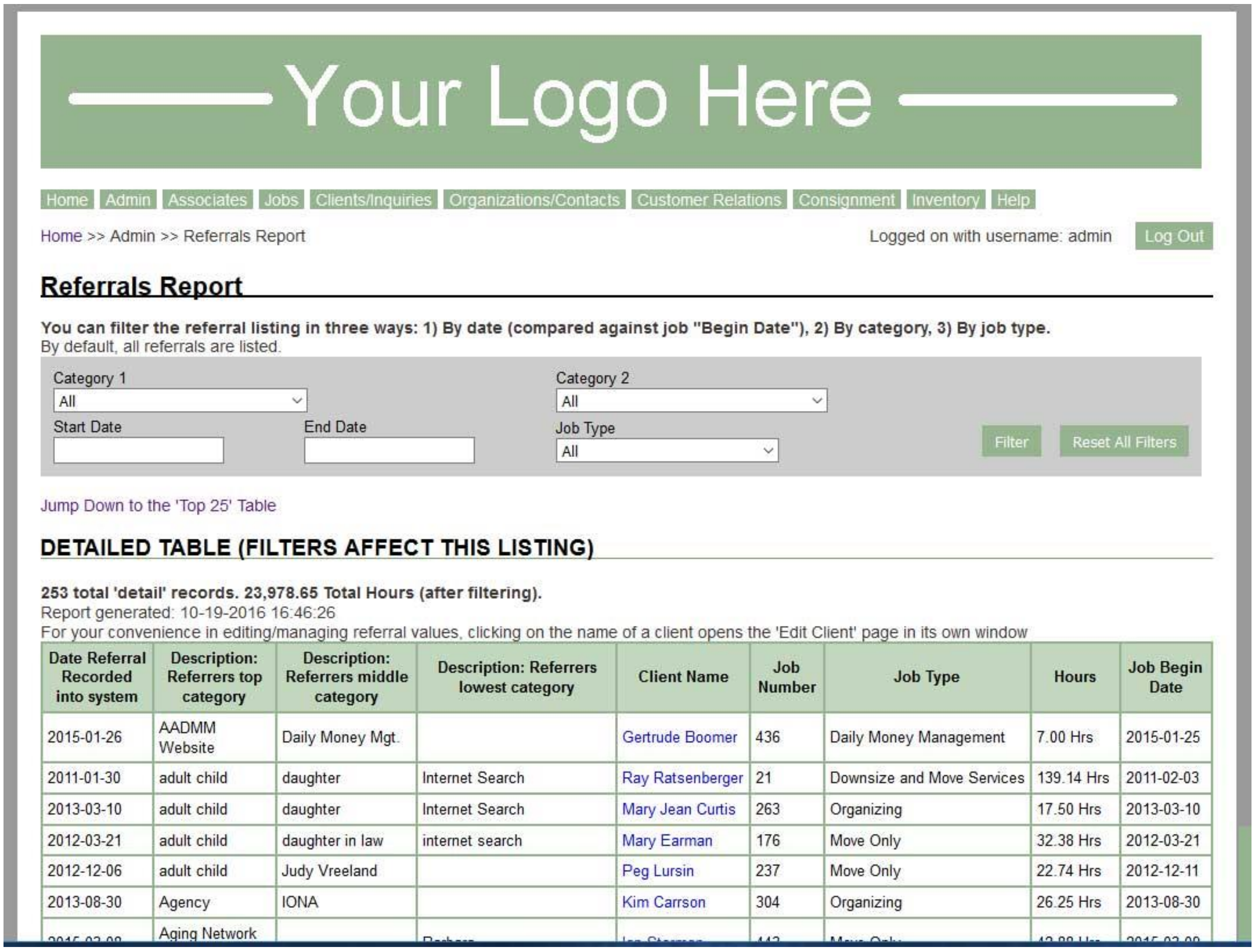


Example of usage:

Category/Top: Attorney
Company: John Smith and Partners Law Practice
Person/Bottom: Tom Thumb

The buttons (with three short horizontal lines) just the right of Category and Company contain clickable lists of previous values used in these fields, generated fresh at the time the page is opened.

You will see next in the report how this hierarchy of categories is used to organize the report.



Your Logo Here

Home | Admin | Associates | Jobs | Clients/Inquiries | Organizations/Contacts | Customer Relations | Consignment | Inventory | Help

Home >> Admin >> Referrals Report

Logged on with username: admin | Log Out

Referrals Report

You can filter the referral listing in three ways: 1) By date (compared against job "Begin Date"), 2) By category, 3) By job type.
By default, all referrals are listed.

Category 1: All
Category 2: All
Start Date
End Date
Job Type: All
Filter | Reset All Filters

Jump Down to the 'Top 25' Table

DETAILED TABLE (FILTERS AFFECT THIS LISTING)

253 total 'detail' records. 23,978.65 Total Hours (after filtering).
Report generated: 10-19-2016 16:46:26
For your convenience in editing/managing referral values, clicking on the name of a client opens the 'Edit Client' page in its own window

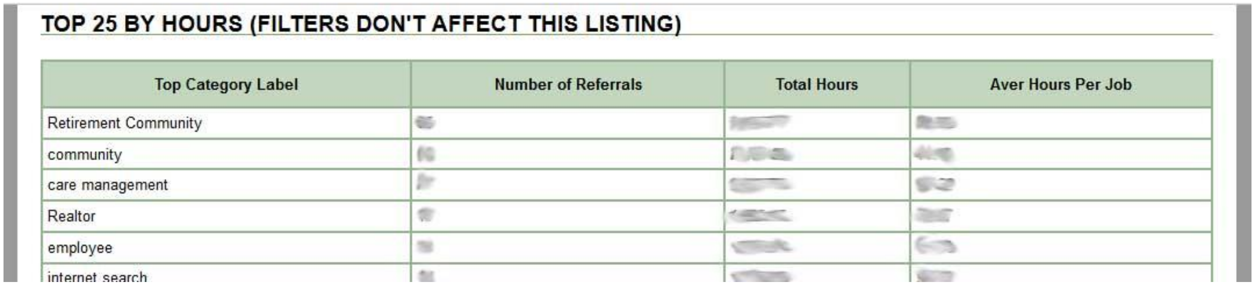
Date Referral Recorded into system	Description: Referrers top category	Description: Referrers middle category	Description: Referrers lowest category	Client Name	Job Number	Job Type	Hours	Job Begin Date
2015-01-26	AADMM Website	Daily Money Mgt.		Gertrude Boomer	436	Daily Money Management	7.00 Hrs	2015-01-25
2011-01-30	adult child	daughter	Internet Search	Ray Ratsenberger	21	Downsize and Move Services	139.14 Hrs	2011-02-03
2013-03-10	adult child	daughter	Internet Search	Mary Jean Curtis	263	Organizing	17.50 Hrs	2013-03-10
2012-03-21	adult child	daughter in law	internet search	Mary Earman	176	Move Only	32.38 Hrs	2012-03-21
2012-12-06	adult child	Judy Vreeland		Peg Lursin	237	Move Only	22.74 Hrs	2012-12-11
2013-08-30	Agency	IONA		Kim Carrson	304	Organizing	26.25 Hrs	2013-08-30
	Aging Network							

At the top of the page are filters, which can be used to shape the results to answer the question of where your referrals are coming from.

The exact labels used for all three fields are completely open, you can enter whatever you like. But since the items are grouped based on these labels (Sorting first by the Generic/Top level, then the middle, then the Specific/Bottom), you will want to be consistent.

For instance, you should avoid using both “Attorney” and “Lawyer” as top level terms, since they will appear far apart in the report.

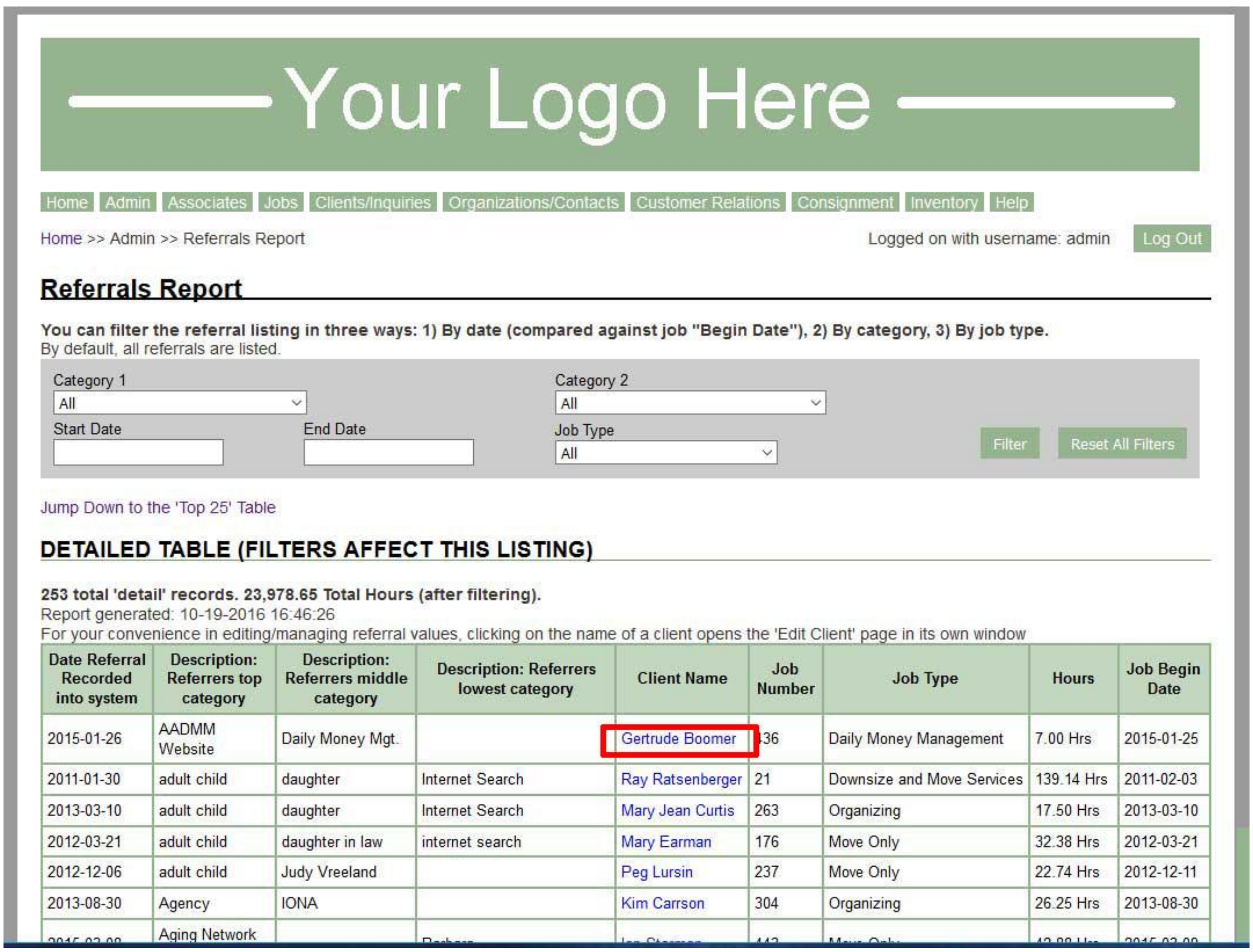
There is a second table which shows your Top 25 referral sources:



TOP 25 BY HOURS (FILTERS DON'T AFFECT THIS LISTING)

Top Category Label	Number of Referrals	Total Hours	Aver Hours Per Job
Retirement Community	[illegible]	[illegible]	[illegible]
community	[illegible]	[illegible]	[illegible]
care management	[illegible]	[illegible]	[illegible]
Realtor	[illegible]	[illegible]	[illegible]
employee	[illegible]	[illegible]	[illegible]
internet search	[illegible]	[illegible]	[illegible]

You may want to edit the labels used per client to improve your results. For your convenience, when you click on a client name in the referral report, a separate window opens with the "Edit Client" command. After you change your referral labels, you still need to click through the Confirm and Completion steps just as always when editing a client. Note that when you click on a second client, it re-uses the second window, it doesn't create a third (fourth, etc) window.



Date Referral Recorded into system	Description: Referrers top category	Description: Referrers middle category	Description: Referrers lowest category	Client Name	Job Number	Job Type	Hours	Job Begin Date
2015-01-26	AADMM Website	Daily Money Mgt.		Gertrude Boomer	36	Daily Money Management	7.00 Hrs	2015-01-25
2011-01-30	adult child	daughter	Internet Search	Ray Ratsenberger	21	Downsize and Move Services	139.14 Hrs	2011-02-03
2013-03-10	adult child	daughter	Internet Search	Mary Jean Curtis	263	Organizing	17.50 Hrs	2013-03-10
2012-03-21	adult child	daughter in law	internet search	Mary Earman	176	Move Only	32.38 Hrs	2012-03-21
2012-12-06	adult child	Judy Vreeland		Peg Lursin	237	Move Only	22.74 Hrs	2012-12-11
2013-08-30	Agency	IONA		Kim Carrson	304	Organizing	26.25 Hrs	2013-08-30
	Aging Network							

Charging Clients for Mileage

If you have SMMware configured to charge Clients for travel, they are charged using a separate copy of the same formula used for paying Associates, with a separate mileage cutoff and a separate rate.

Vehicles

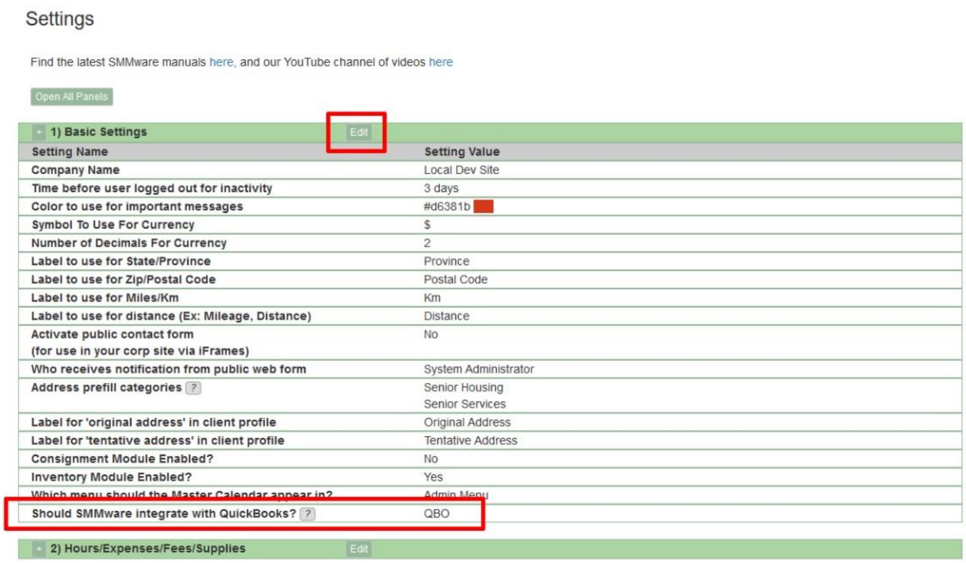
If you are among the businesses with company vehicles, SMMware can help manage these. You can create an Associate record and assign it a ‘Type’ of ‘Vehicle’. This allows you to schedule the vehicle just like a regular Associate. Also, when you enter miles for a Vehicle, the included miles/km are automatically zero, such that the client is charged for the entire distance.

QuickBooks Online Integration

	Watch our YouTube videos about QuickBooks Online Integration. For configuration and data imports: https://youtu.be/pI8HZb3lndA For using the integration: https://youtu.be/iXBXYqo__-o (if any of these link are broken because we’ve posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)

Enable the Integration with QuickBooks Online (QBO)

First, enable QuickBooks Online integration by navigating to Admin->Settings and editing “Section 1) Basic Settings”. For the setting “Should SMMware integrate with QuickBooks?” choose “QBO”. Note that this setting will only be offered to you if your SMMware user has a permission level of “Company Owner” (which is set in your Associate Profile).



Settings

Find the latest SMMware manuals here, and our YouTube channel of videos here

Open All Panels

1) Basic Settings Edit

Setting Name	Setting Value
Company Name	Local Dev Site
Time before user logged out for inactivity	3 days
Color to use for important messages	#d6381b
Symbol To Use For Currency	$
Number of Decimals For Currency	2
Label to use for State/Province	Province
Label to use for Zip/Postal Code	Postal Code
Label to use for Miles/Km	Km
Label to use for distance (Ex: Mileage, Distance)	Distance
Activate public contact form (for use in your corp site via iFrames)	No
Who receives notification from public web form	System Administrator
Address prefill categories ?	Senior Housing Senior Services
Label for 'original address' in client profile	Original Address
Label for 'tentative address' in client profile	Tentative Address
Consignment Module Enabled?	No
Inventory Module Enabled?	Yes
Which menu should the Master Calendar appear in?	Admin Menu
Should SMMware integrate with QuickBooks? ?	QBO

2) Hours/Expenses/Fees/Supplies Edit

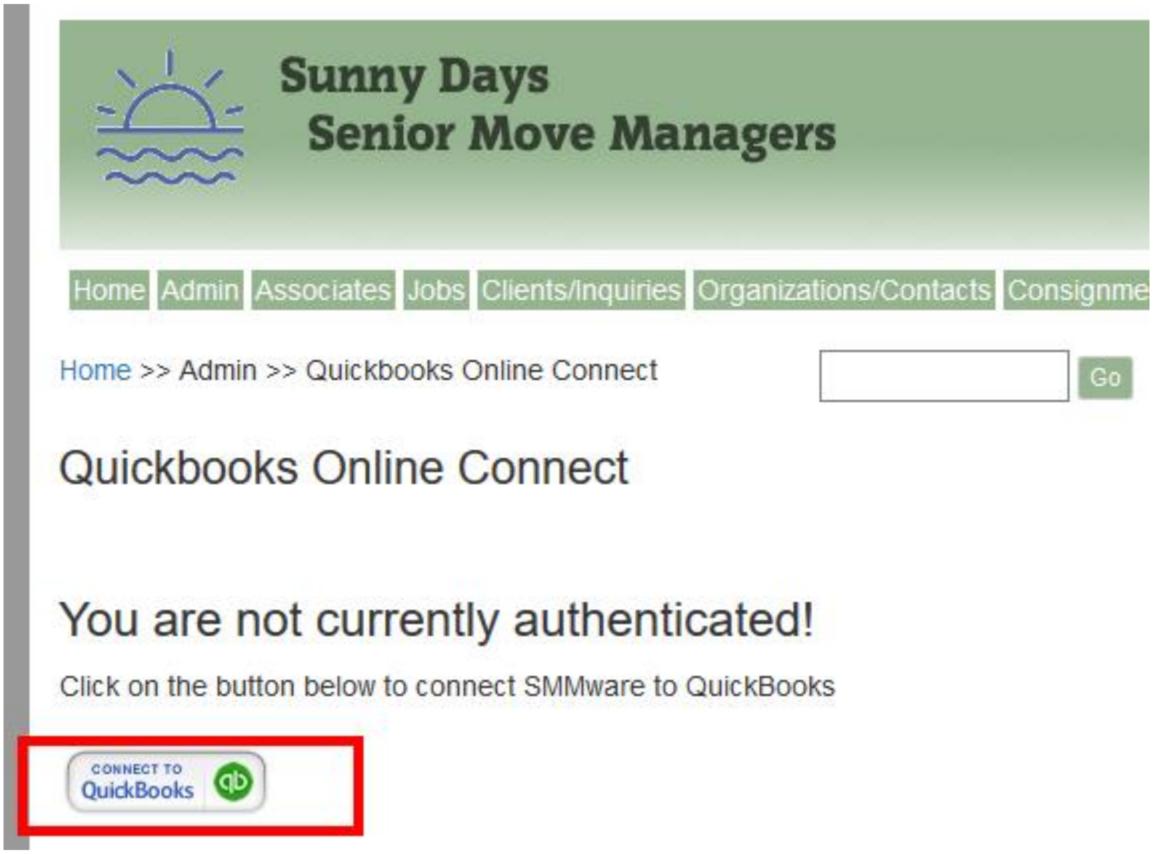
Associate Permissions

For a given associate to see QBO related commands, their Associate Profile has to have 'QBO Admin'? set to 'Yes'. Only a user with 'Company Owner' permissions can set this permission for one of their associates.

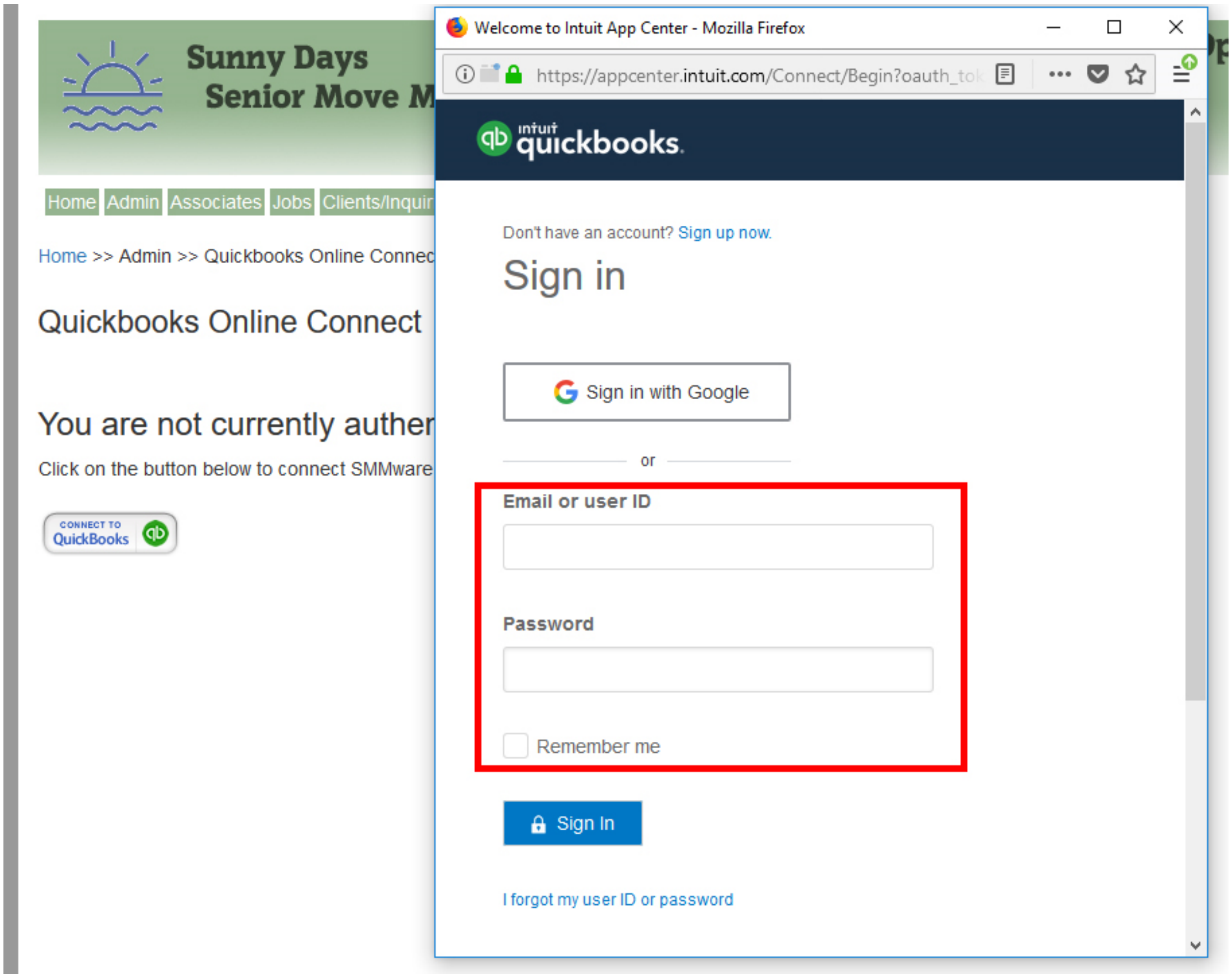
Connect SMMware to QuickBooks Online

In the Admin Menu, browse to the command “QuickBooks Online Connect”. The screen will tell you “You are not currently authenticated”, and you will need to log in, described below. First click on the

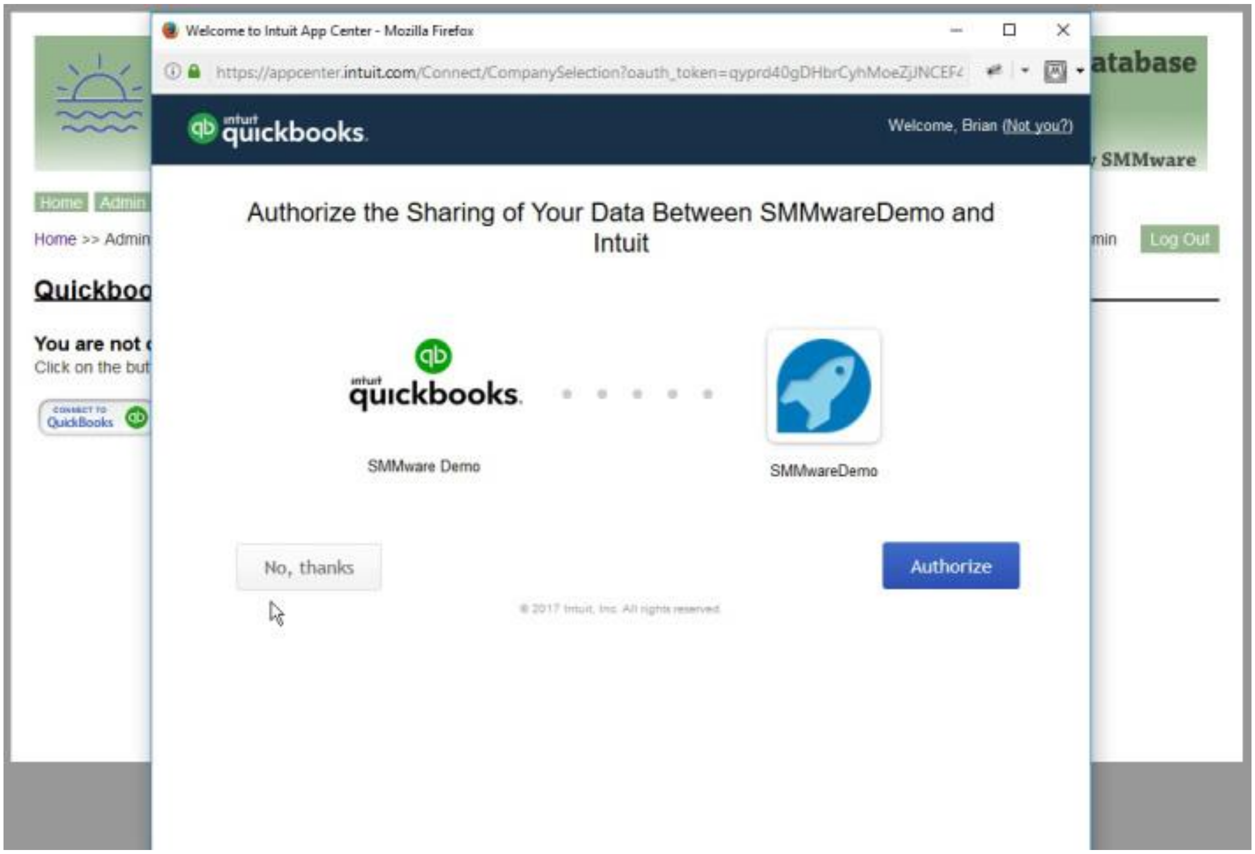
“Connect to QuickBooks” button.



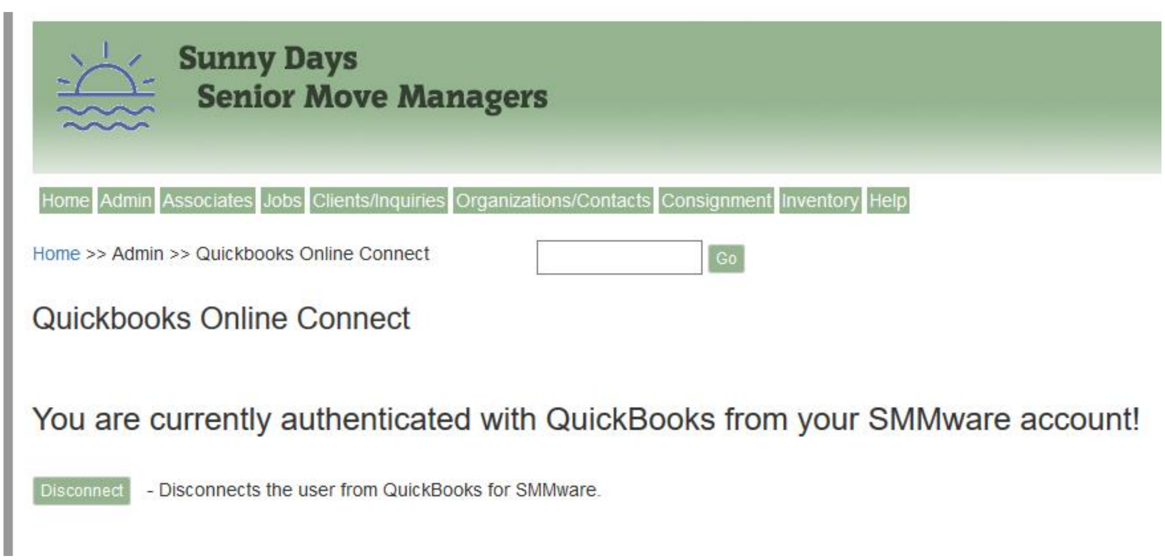
On the next screen, enter your login information for QuickBooks (not SMMware). This screen comes directly from QuickBooks, at no time does SMMware store or even have access to your QuickBooks login information.


Welcome to Intuit App Center - Mozilla Firefox
https://appcenter.intuit.com/Connect/Begin?oauth_tok
intuit quickbooks
Don't have an account? Sign up now.
Sign in
Sign in with Google
or
Email or user ID
Password
Remember me
Sign In
I forgot my user ID or password
Sunny Days Senior Move M
Home Admin Associates Jobs Clients/Inquir
Home >> Admin >> Quickbooks Online Connec
Quickbooks Online Connect
You are not currently auther
Click on the button below to connect SMMware
CONNECT TO QuickBooks

After you have logged into QuickBooks, you'll be asked to approve SMMware to access your QuickBooks account. You'll want to click on the blue "Authorize" button.



Once the connection is established, if you return to this page (Admin->QuickBooks Online Connect), you'll see a message that you are already connected, and you have the option of disconnecting if you wish.



Configuration and Importing Initial Data

Next you will import (from QuickBooks into SMMware) your Chart of Accounts, your Items, and your Payment Methods. This video shows you how to do so (as well as the other aspects of getting set up): https://youtu.be/pI8HZb3lndA

The above video will also walk you through importing your Clients, Vendors (Organizations), and Associates, and lastly with configuration settings.

If you need help with the above tasks, please feel free to contact SMMware support.

Moving forward, after this import operation, you will create clients, associates, and vendors in SMMware and allow them to be copied over to QuickBooks Online.

SMMware will not stop you from creating these items in QuickBooks Online but any of these items created in QBO will not be copied back to SMMware. This restriction is similar to what is asked by other software packages that integrate with QuickBooks Online. See the appendix for more details and a comparison of approaches between SMMware and at least one other popular software package. If you accidentally make entries at QuickBooks, re-run the applicable import command (Client, Vendor, Associate) to re-synchronize QuickBooks and SMMware. The process won't modify entries in SMMware that were also synchronized.

Post Import Actions for Associates, Clients, Organizations

After an import to SMMware, you will need to fill in certain fields to the profiles in SMMware since QuickBooks can not provide all the relevant information.

Clients: In SMMware, you may wish to fill in the "Referred By" fields, as well as the "Act as Reference" field if you know that the client is willing to act as a reference. Lastly, a SMMware client profile can have optional fields not present in QuickBooks, so you may wish to enter information for these fields.

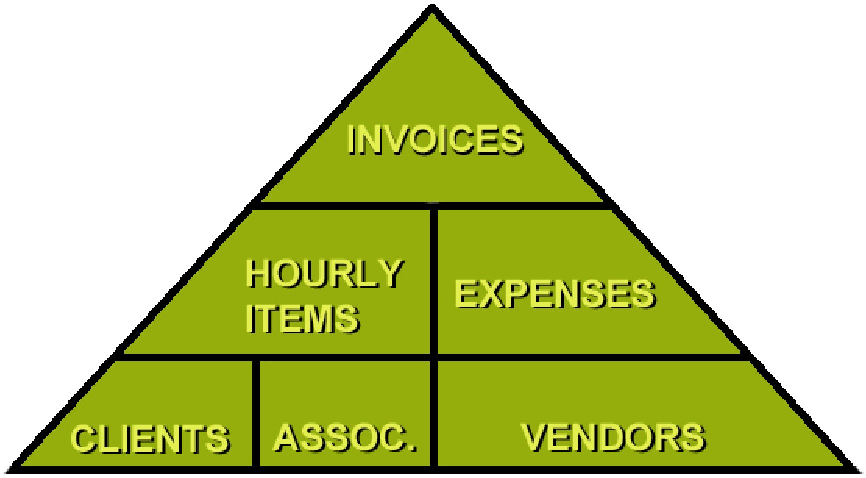
Associates: SMMware username and password need to be assigned. You may wish to enter an hourly rate, depending on how you are handling the entry of hours, expenses & miles, and payroll.

Organizations (Vendors): QuickBooks does not categorize vendors, so you may want to assign categories within SMMware. You may leave your vendors as uncategorized as well, if desired.

Normal Day to Day: Copying Items to QBO

Having worked through the above steps, at this point you've completed the one-time effort to get things set up. Now we'll discuss how you can expect to use SMMware's integration with QuickBooks on a day to day basis.

There is a hierarchy of information in SMMware, as illustrated in the diagram below, with a given level being dependent on the lower levels. Invoices can have hourly items, and each one of those in turn require clients and associates. When SMMware copies an item, it also copies any dependent items. It also remembers if it has already copied a given item over and doesn't do so again.

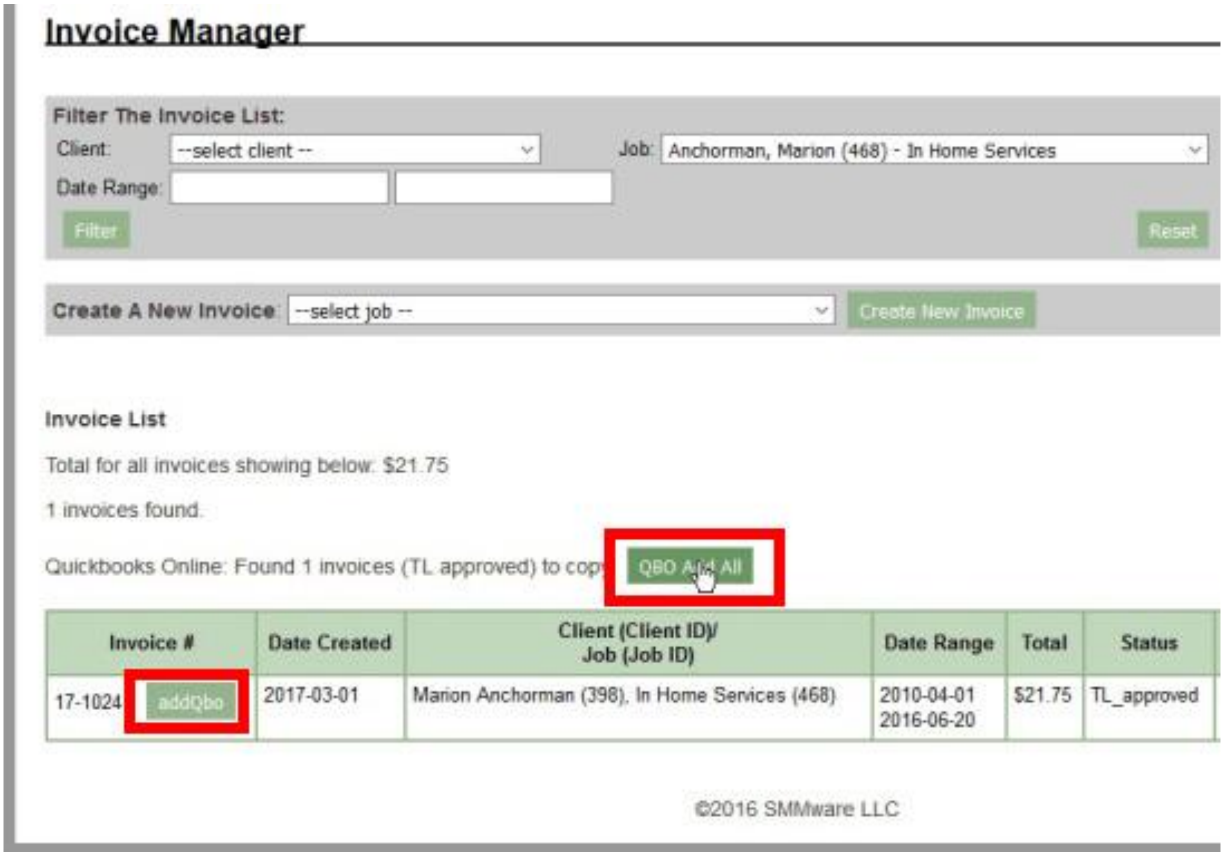


Listed below are the places where you can copy items over to QuickBooks Online.

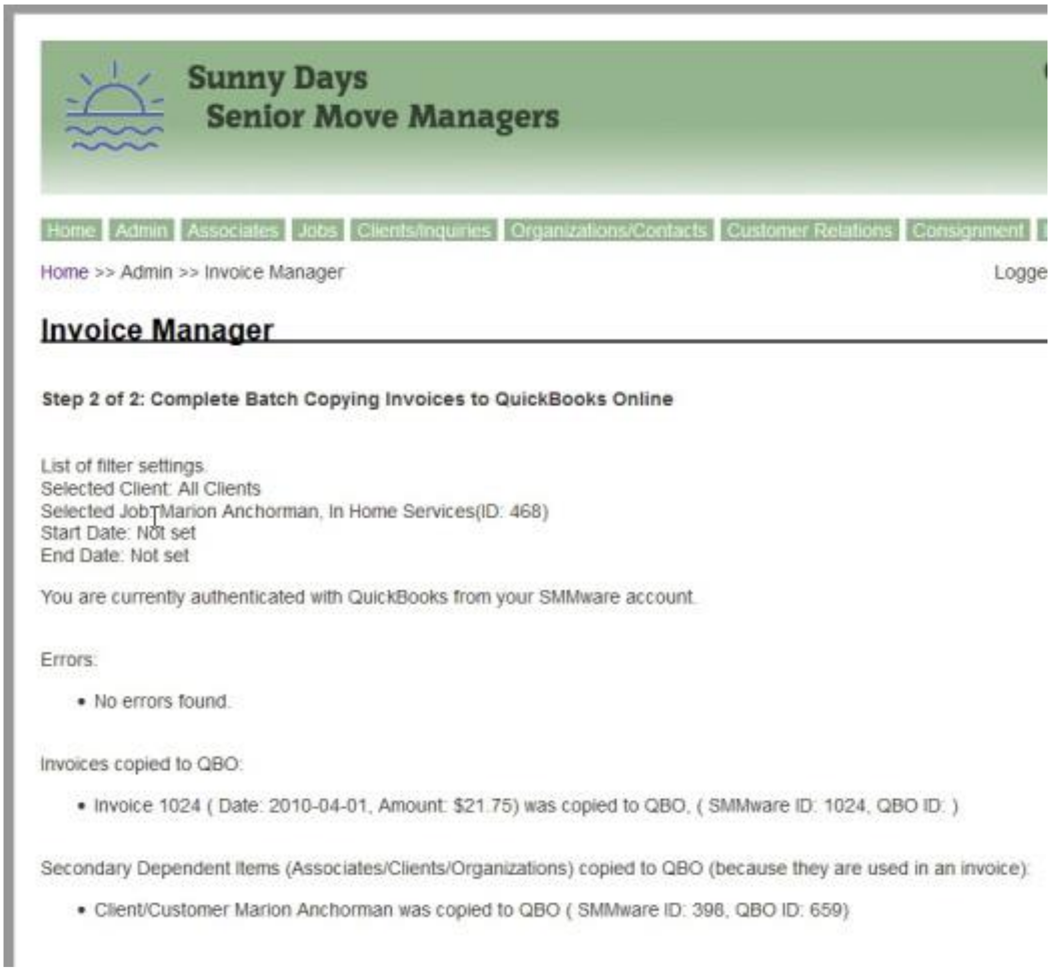
- Admin->Invoice Manager
- Associates-> My Hours/Expense/Mileage History
- Associates->Associate Manager
- Clients/ Sales -> Client Manager
- Organizations/Contacts -> Organization Manager

For a given item type, SMMware lets you copy over either an individual item or, for a listing, it lets you copy over all the items in that listing.

When looking at a listing of Invoices, you will see the button "QBO Add All". When looking at an individual invoice, you will see the button "Add QBO". There are similar buttons for clients, associates, and for hourly and expense item entries.


Invoice Manager
Filter The Invoice List:
Client:
--select client --
Job:
Anchorman, Marion (468) - In Home Services
Date Range:
Filter
Reset
Create A New Invoice:
--select job --
Create New Invoice
Invoice List
Total for all invoices showing below: $21.75
1 invoices found.
Quickbooks Online: Found 1 invoices (TL approved) to copy
QBO Add All
Invoice #
Date Created
Client (Client ID)/ Job (Job ID)
Date Range
Total
Status
17-1024
addQbo
2017-03-01
Marion Anchorman (398), In Home Services (468)
2010-04-01 2016-06-20
$21.75
TL_approved
©2016 SMMware LLC

Below is an example of the feedback provided for a copying operation.



How To Fix, When Records Are Accidentally Created At QBO

When you integrate SMMware with QBO, you should always create new records for Associates, Clients, and Vendors in SMMware and let SMMware copy them to QBO. But when a mistake happens and a record is created at QBO instead, you can still fix it.

If you create an Associate (Employee) record at QBO, then within SMMware you can navigate to Associates->Associate Manager and edit the affected Associate record. Click “QBO Add” and then “Next”, as usual. You will be given a list of choices that SMMware thinks might match the relevant record at QBO.

Step 2 of 2: Complete Copying Associate to QuickBooks Online
You are currently authenticated with QuickBooks from your SMMware account!

Error message from QBO: The name supplied already exists. : Another customer, vendor or employee is already using this name. Please use a different name.

To resolve, pick one of the below:

First Name	Last Name	QBO ID
Johannes	Bach	62

Click on the button in the 'QBO ID' column ('62', in the example above) to have SMMware match this associate to the record at QBO.

Fixing a record for a Client or Organization (Vendor) works the same way, using the Client or Organization profile as applicable.

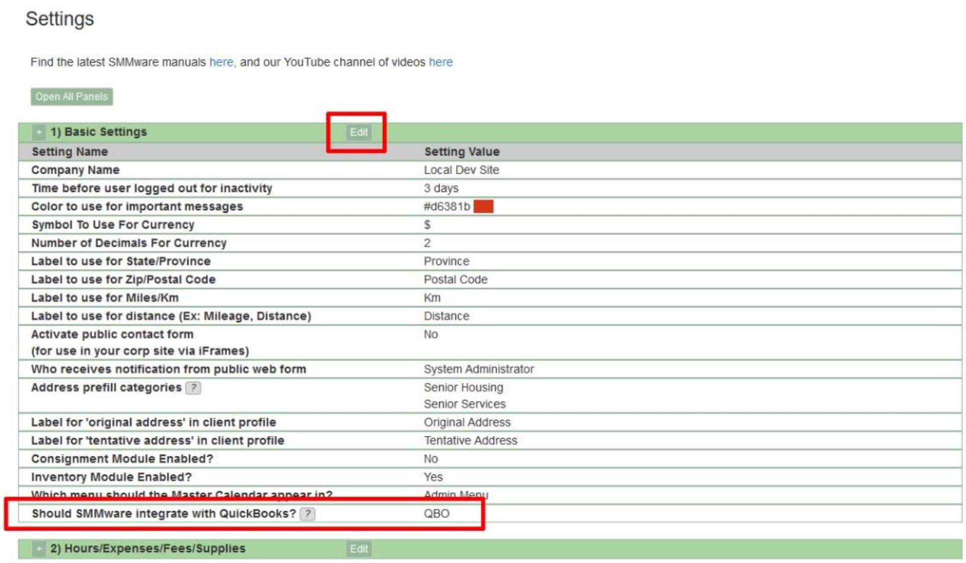
You can also re-run the import operation found in Admin->QuickBooks Online Settings.

QuickBooks Desktop Integration

YouTube	Watch our YouTube video about QuickBooks Desktop Integration. For configuration and data import: https://youtu.be/s624CLHHE8g For using the integration: https://youtu.be/lpnvI2ODw3s (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)

Enable the Integration with QuickBooks Desktop (QBD)

First, enable QuickBooks Online integration by navigating to Admin->Settings and editing "Section 1) Basic Settings". For the setting "Should SMMware integrate with QuickBooks?" choose "QBD". Note that this setting will only be offered to you if your user has a permission level of "Company Owner" (which is set in your Associate Profile).



Associate Permissions

For a given associate to see QBD related commands, their Associate Profile has to have 'QBD Admin'? set to 'Yes'. Only a user with 'Company Owner' permissions can set this permission for one of their associates.

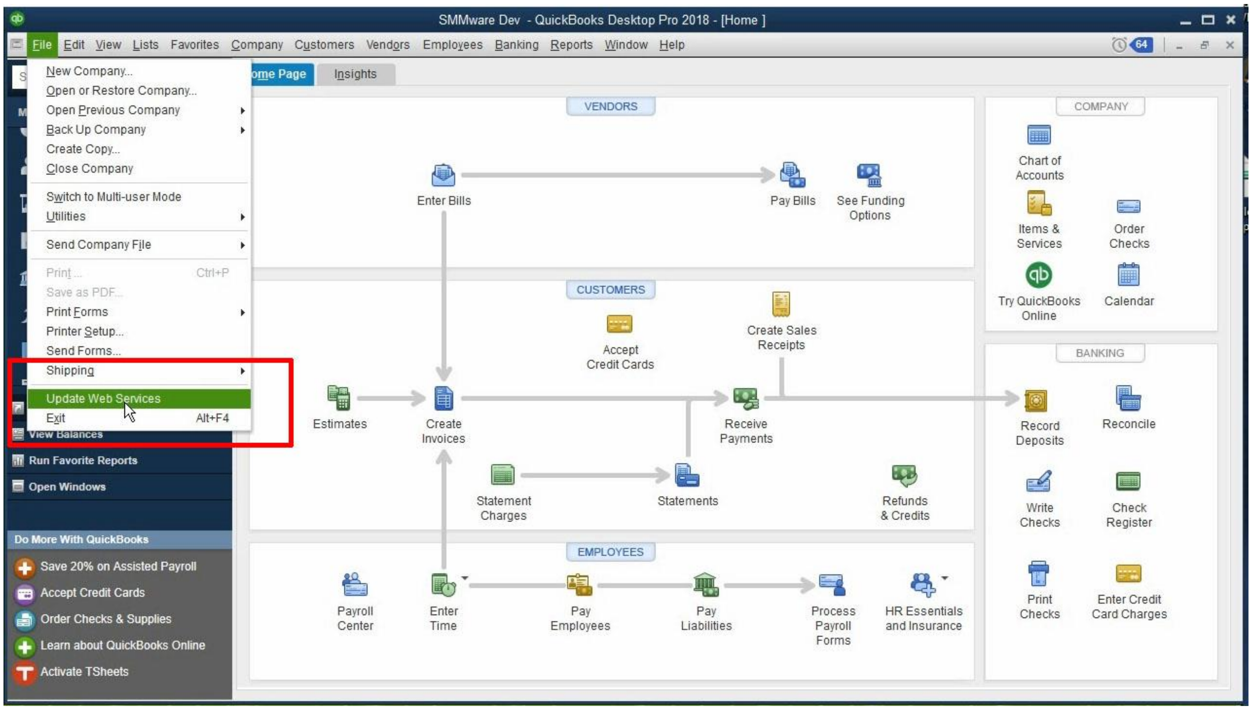
Connect SMMware to QuickBooks Desktop

Download the ‘qwc’ file (qwc = QuickBooks Web Connector) and save it somewhere on the hard drive of the same computer that you have QuickBooks Desktop installed on. You will find the qwc under Admin->QuickBooks Desktop Settings. The link will only appear if your user has a “Company Owner” permission level.

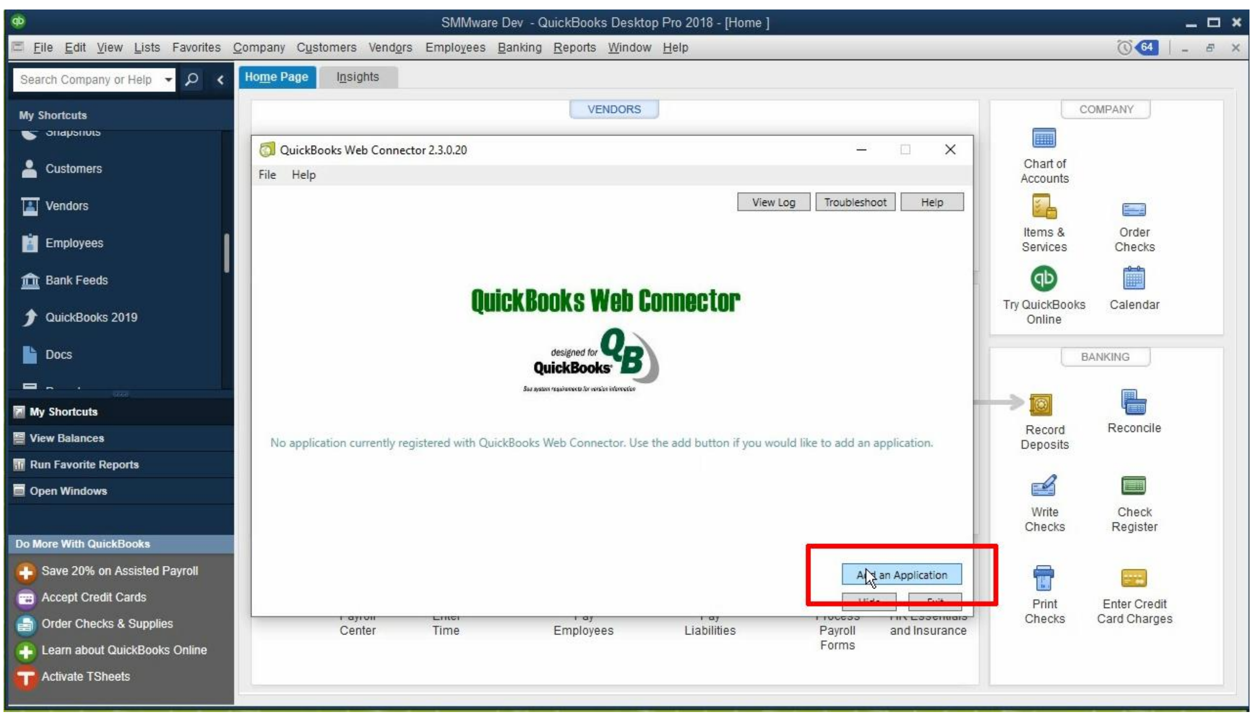
Next you need to set a password. Only a “Company Owner” can set this password. Behind the scenes QuickBooks will present this password to SMMware each time it wants to communicate with SMMware. You’ll be giving this password to QuickBooks in a later step. The first time you connect QuickBooks and SMMware, you will be entering this password into QuickBooks. Once the connection is set up, you will not need to login every time (assuming you allow QBD to save your password).

To set the password in SMMware click on “Edit Settings” and on the following screen set your password.

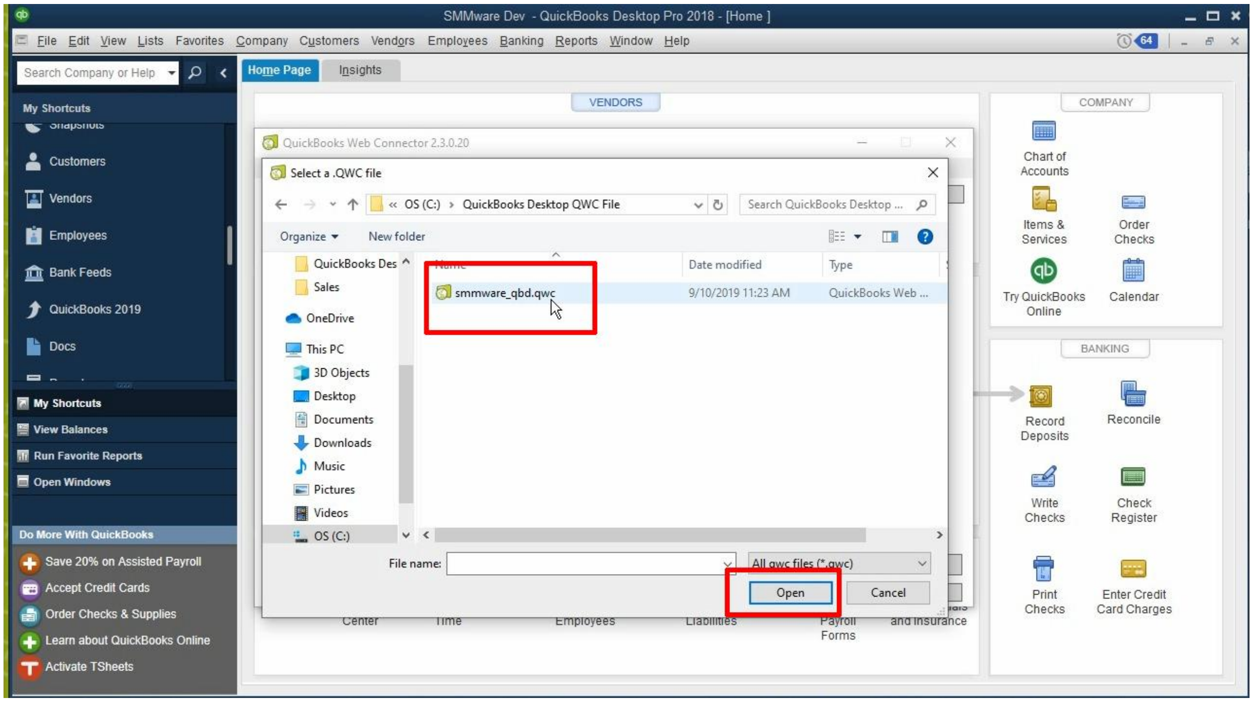
Next, from within QuickBooks, click on “File” and then “Update Web Services”.



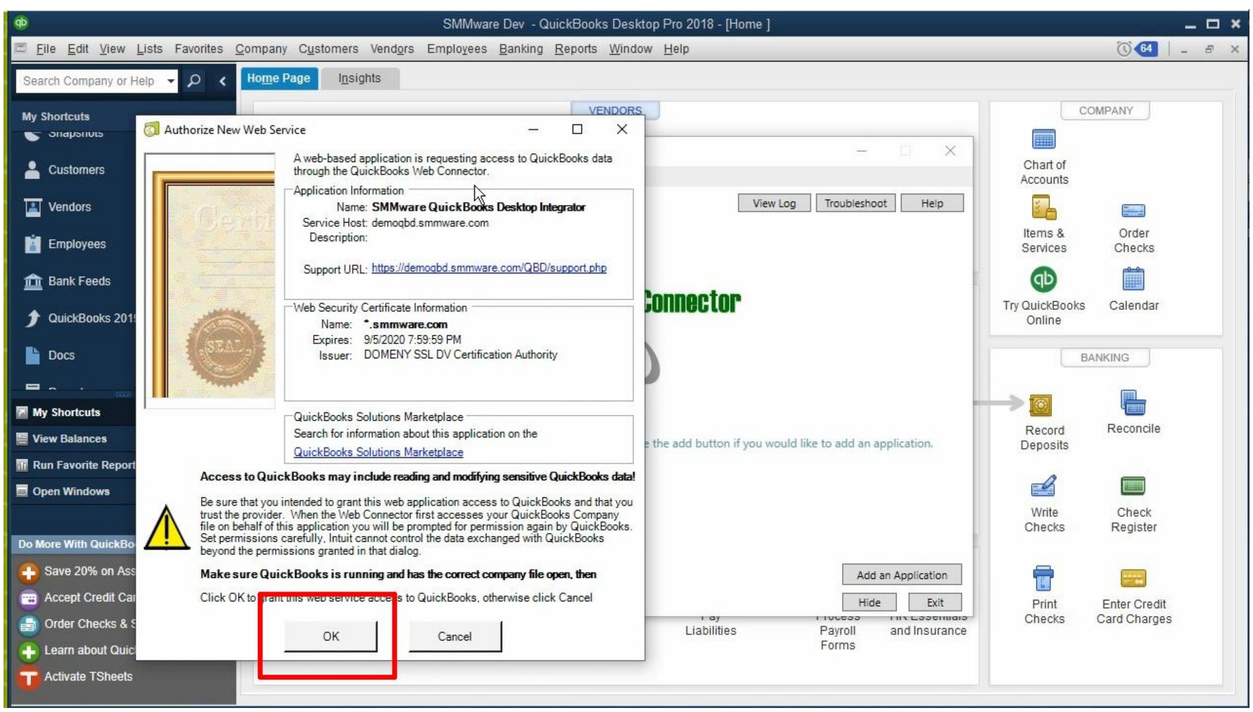
Next click “Add Application”



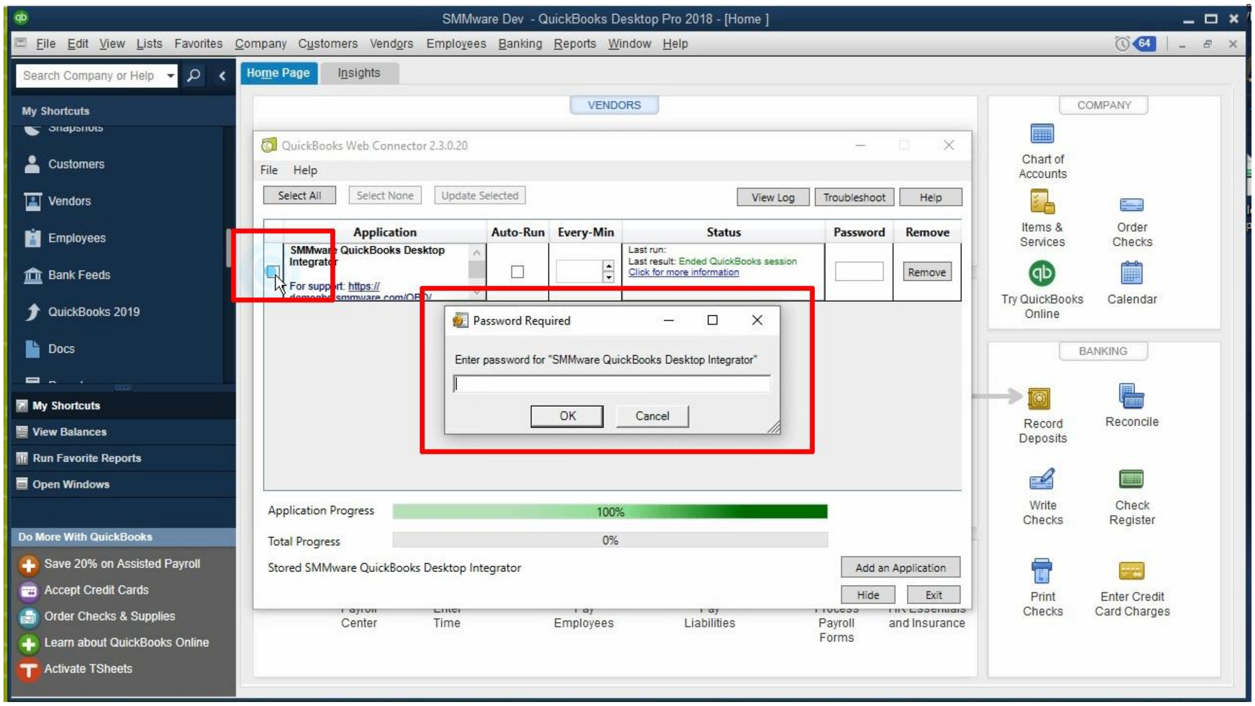
Next, navigate to where you stored the 'qwc' file and select it.



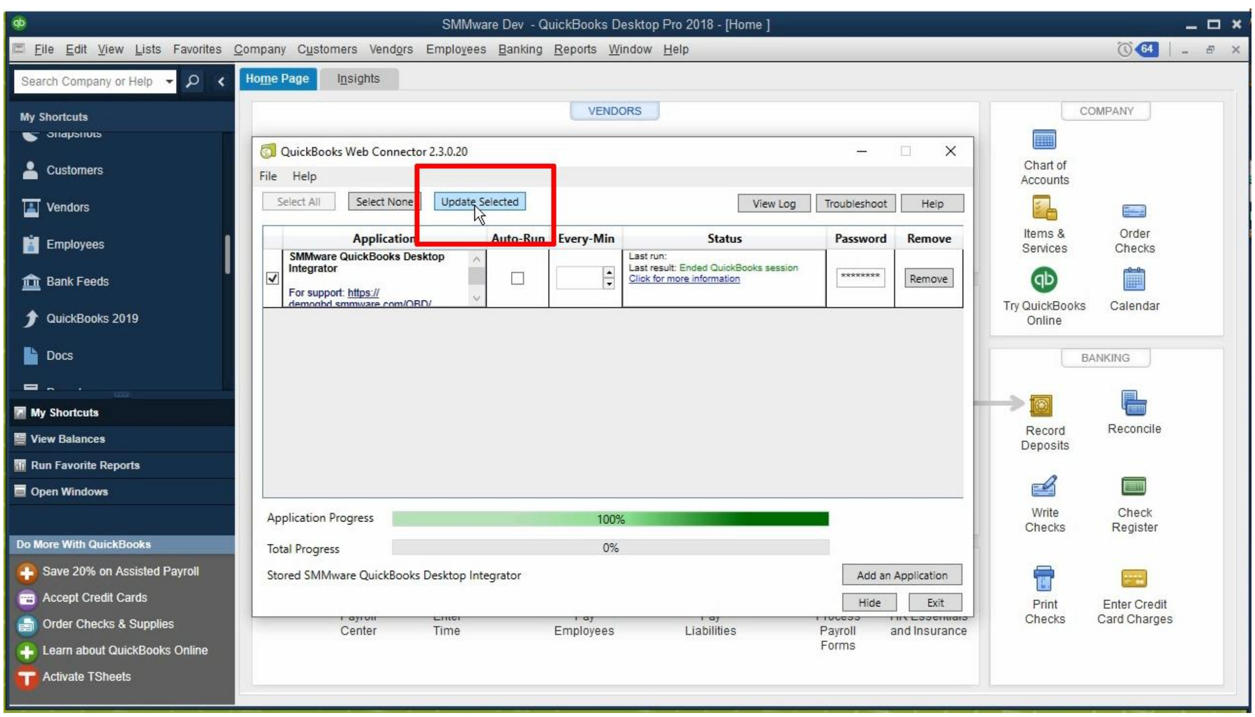
Approve the certificate.



Now check the box at the left of the new entry, and you will be asked for the password. Enter it, and then click ‘Update Selected”.



After you enter the password, you should be connected. You can verify your connection by clicking on “Update Selected”. The status column should show a message “No Date Exchange Required” in green (red means there is an issue, contact SMMware support for assistance).



Configuration and Importing Initial Data

Next you will import (from QuickBooks into SMMware) your Chart of Accounts, your Items, and your Payroll Items and (if applicable) Price Levels. This video shows you how to do so (as well as the other aspects of getting set up): https://youtu.be/s624CLHHE8g

The above video will also walk you through importing your Clients, Vendors (Organizations), and Associates, and lastly with configuration settings.

If you need help with the above tasks, please feel free to contact SMMware support.

Moving forward, after this import operation, you will create clients, associates, and vendors in SMMware and allow them to be copied over to QuickBooks Desktop.

The system will not stop you from creating these items in QuickBooks Desktop but any of these items created in QBD will not be copied back to SMMware.

Post Import Actions for Associates, Clients, Organizations

After an import to SMMware, you will need to fill in certain fields to the profiles in SMMware since QuickBooks can not provide all the relevant information.

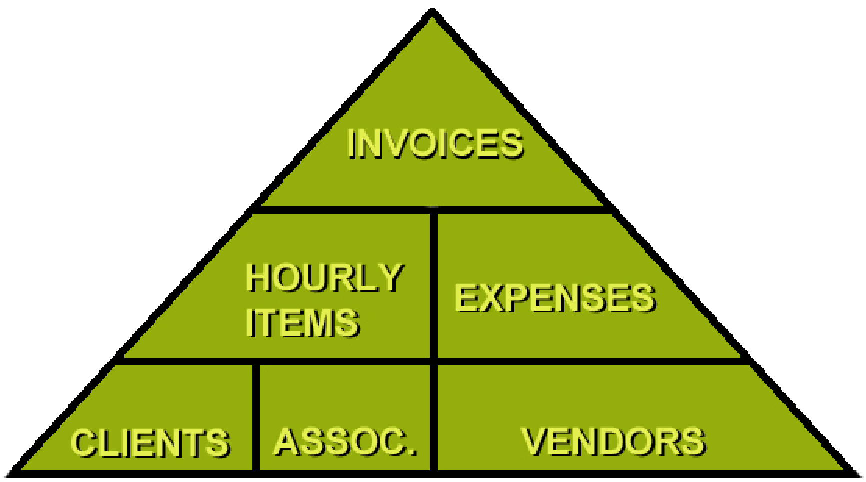
Associates: SMMware username and password need to be assigned. You may wish to enter an hourly rate, depending on how you are handling the entry of hours, expenses & miles, and payroll.

Organizations (Vendors): QuickBooks does not categorize vendors, so you may want to assign categories within SMMware. You may leave your vendors as uncategorized as well, if desired.

Clients: In SMMware, you may wish to fill in the “Referred By” fields, as well as the “Act as Reference” field if you know that the client is willing to act as a reference. Lastly, a SMMware client profile can have optional fields not present in QuickBooks, so you may wish to enter information for these fields.

Normal Day to Day: Copying Items to QBD

There is a hierarchy of information in SMMware, as illustrated in the diagram below, with a given level being dependent on the lower levels. Invoices can have hourly items, and each one of those in turn require clients and associates. When SMMware copies an item, it also copies any dependent items. It also remembers if it has already copied a given item over and doesn’t do so again.



Listed below are the places where you can enqueue items over to QuickBooks Desktop

- Admin->Invoice Manager
- Associates-> My Hours/Expense/Mileage History
- Associates->Associate Manager
- Clients/ Sales -> Client Manager
- Organizations/Contacts -> Organization Manager

For a given item type, SMMware lets you copy over either an individual item or, for a listing, it lets you copy over all the items in that listing.

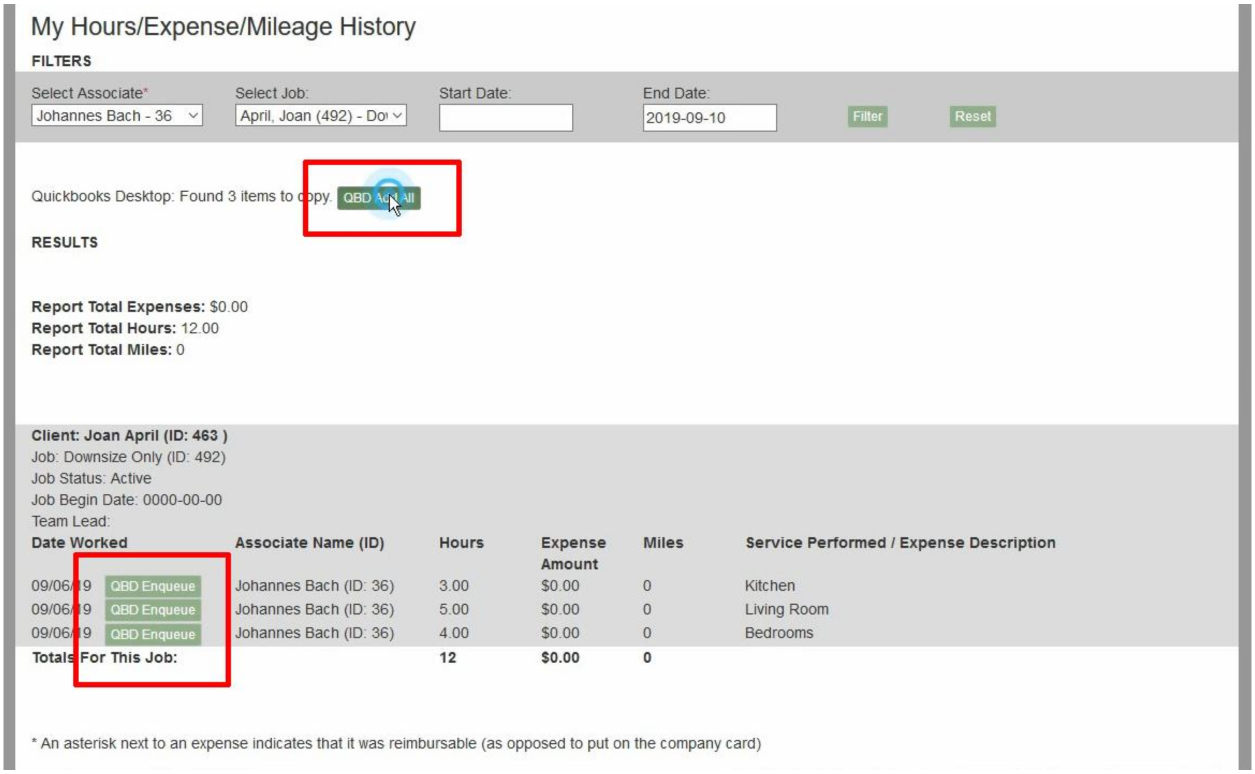
When looking at a listing of Invoices, you will see the button “QBD Enqueue All”. When looking at an individual invoice, you will see the button “QBD Enqueue”. There are similar buttons for clients, associates, and for hourly and expense item entries.

QuickBooks has designed a two step process for copying information from 3rd party applications like SMMware down to QuickBooks Desktop.

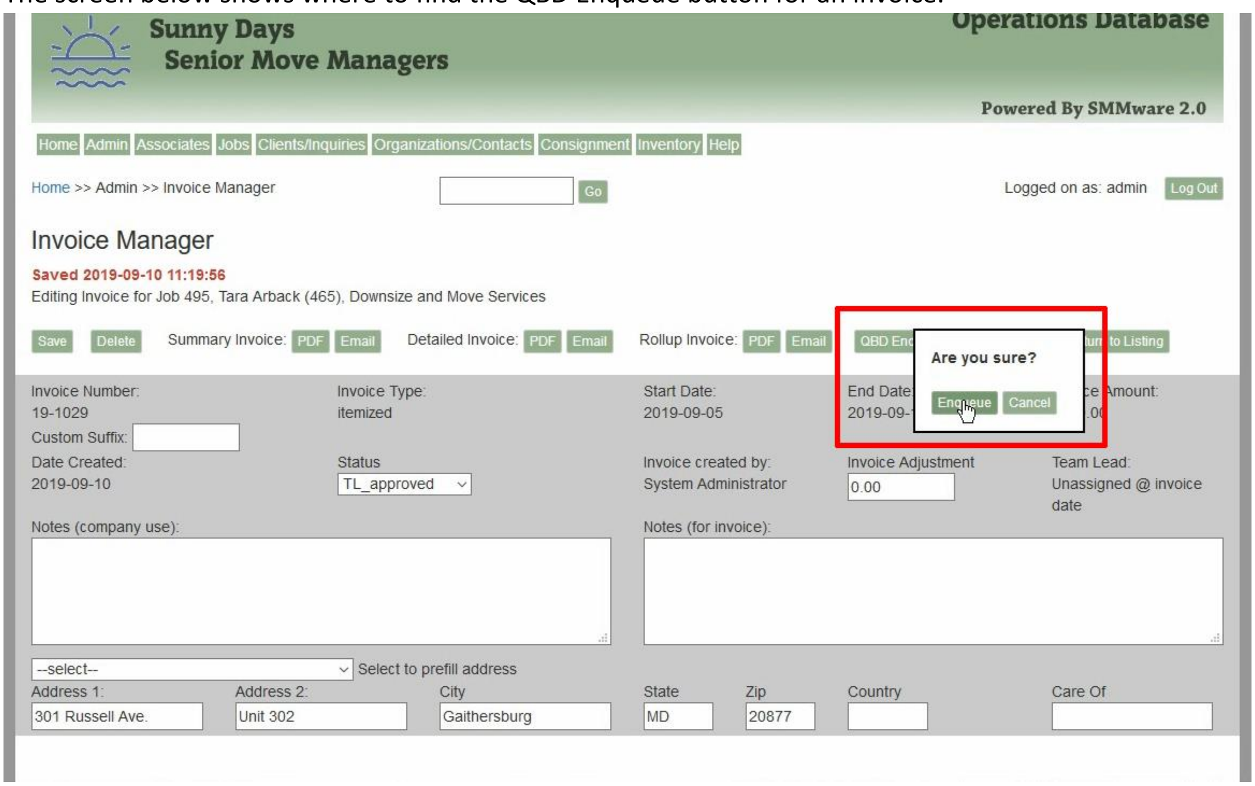
1) Within SMMware, add items to a queue. This queue is simply a list within SMMware of items that you want copied to QBD.
2) Within QuickBooks, run a synchronization command using the “Web Connector”, which causes QBD to contact SMMware and ask for items to copy down.

For Step 1, you will see buttons to enqueue various items, such as invoices, Hours/Expense entries, and even individual Clients, Associates, & Vendors. The screenshots below show you where to find these buttons.

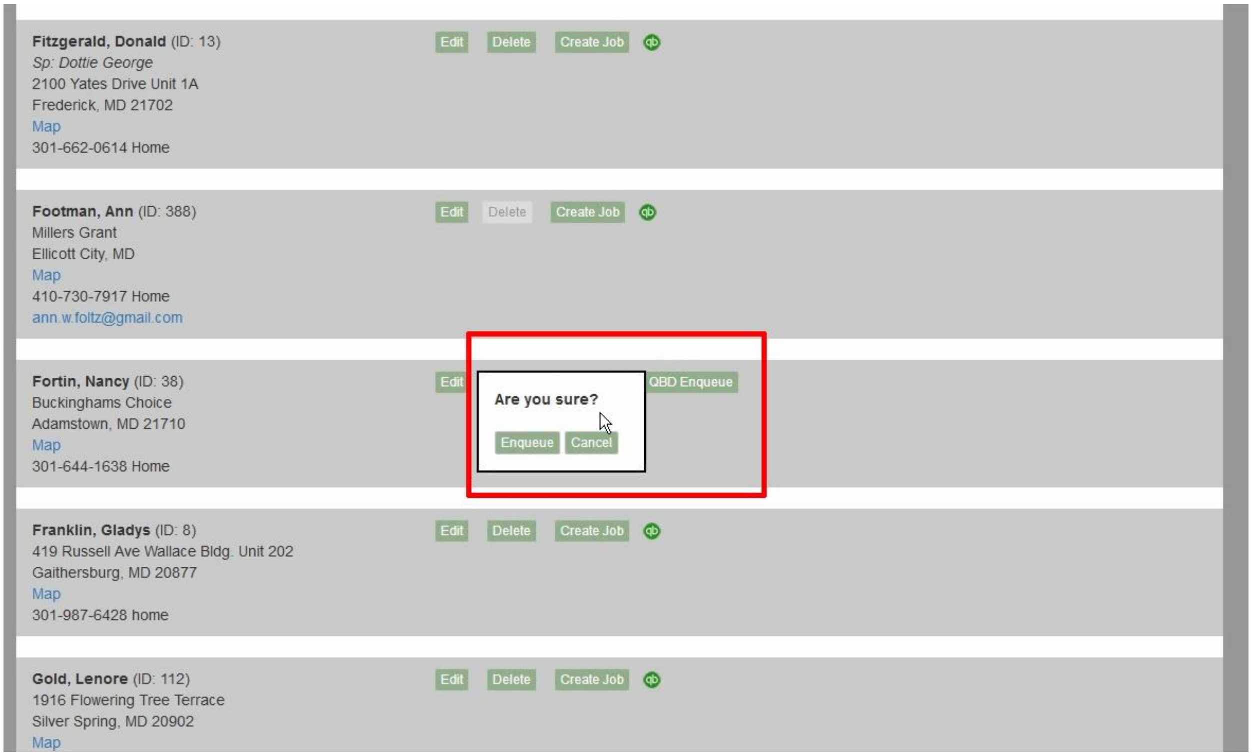
Below is the screen where you can enqueue Hours and Expense items, by navigating to Admin-> My Hours/Expense/Mileage History.



The screen below shows where to find the QBD Enqueue button for an invoice.

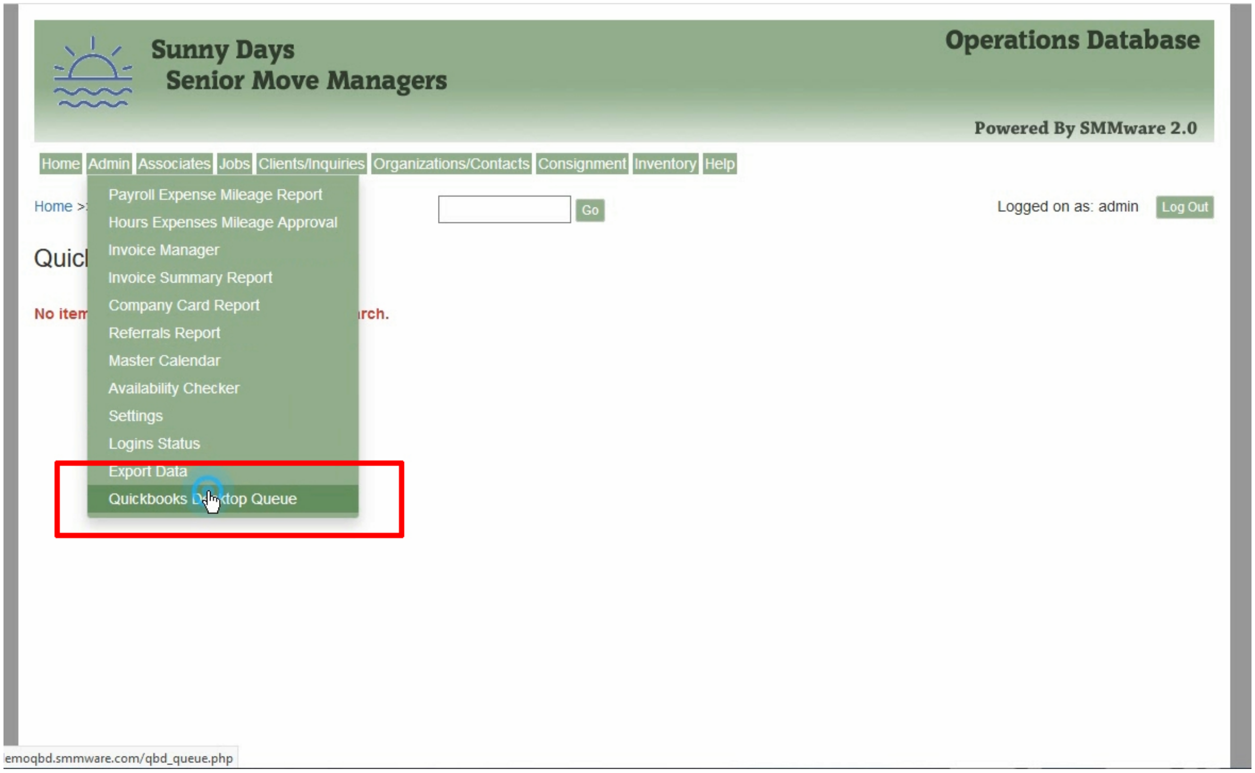


The screen below shows where to find the “QBD Enqueue” button for a client.

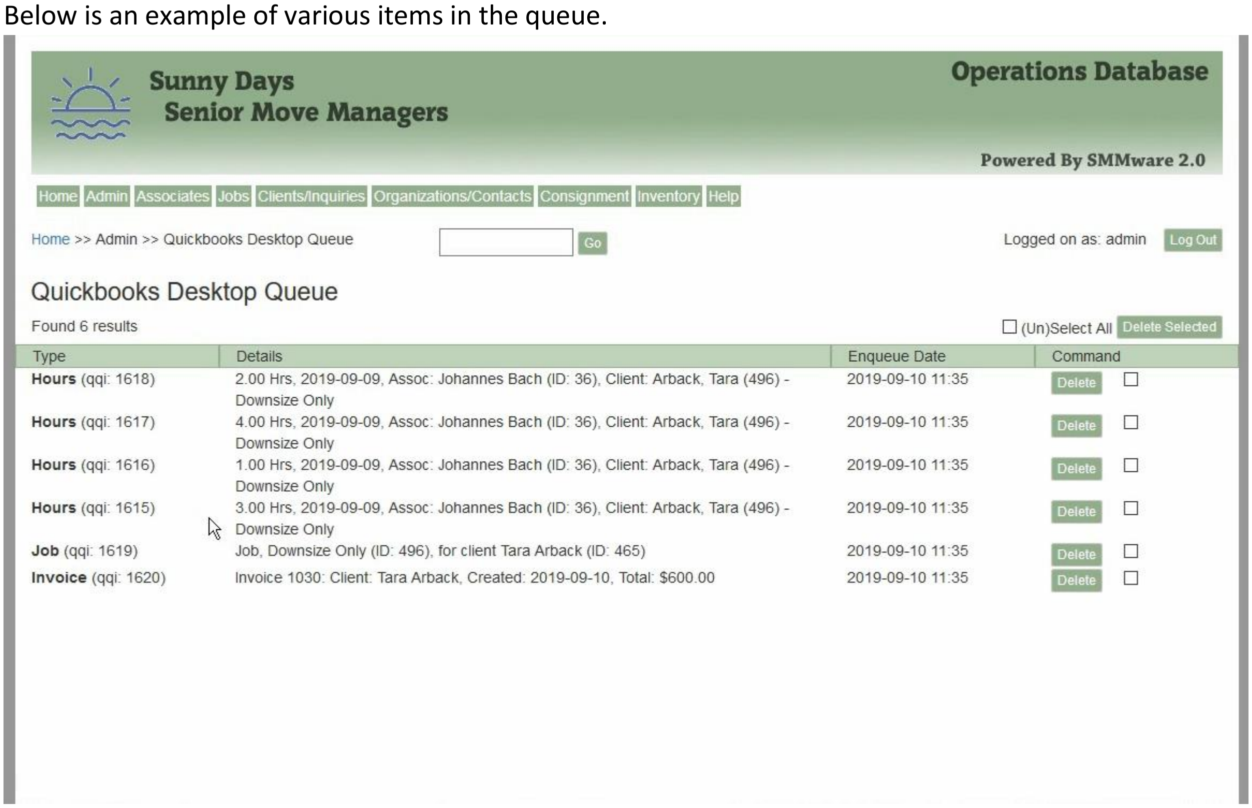


Once an item is in the queue, a blue 'QB" icon will be displayed. After the item has actually been copied to QuickBooks, the icon will be green.

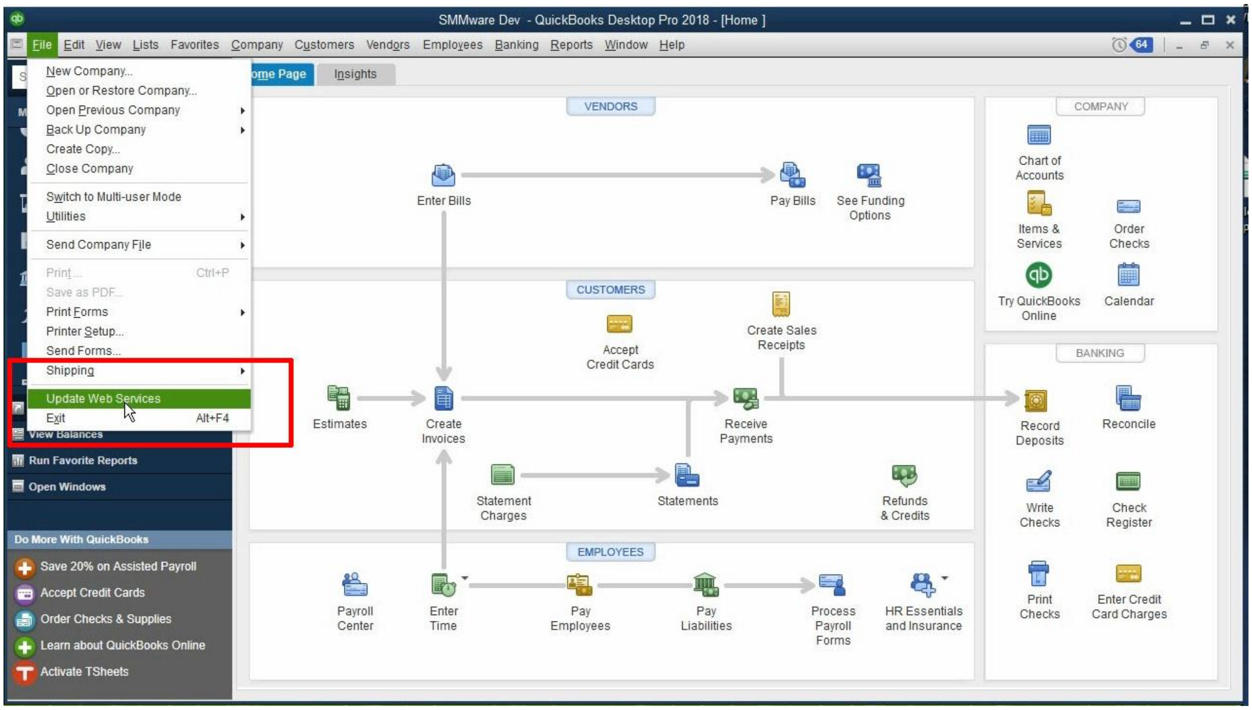
SMMware allows you to review the items currently held in the queue, by navigating to Admin->QuickBooks Desktop Queue.



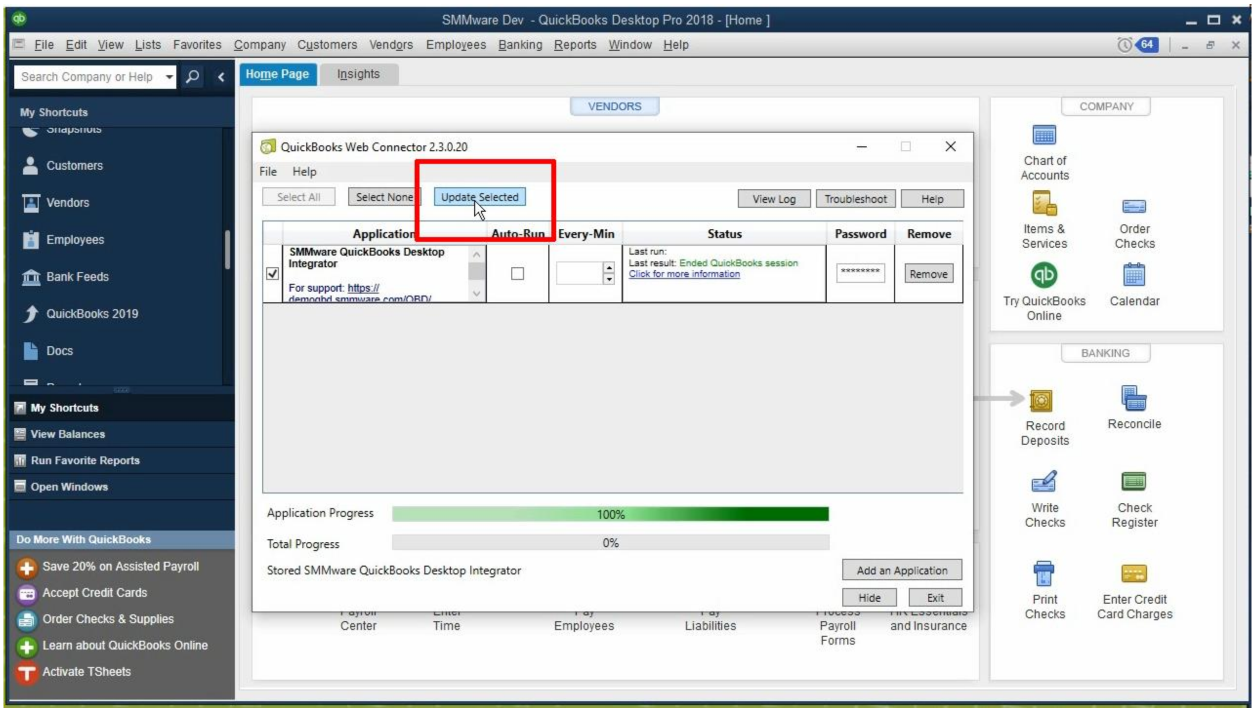
Below is an example of various items in the queue.



Step 2 is performed within QuickBooks Desktop. In the File Menu, click “Update Web Services”, after which the Web Connector popup will appear.

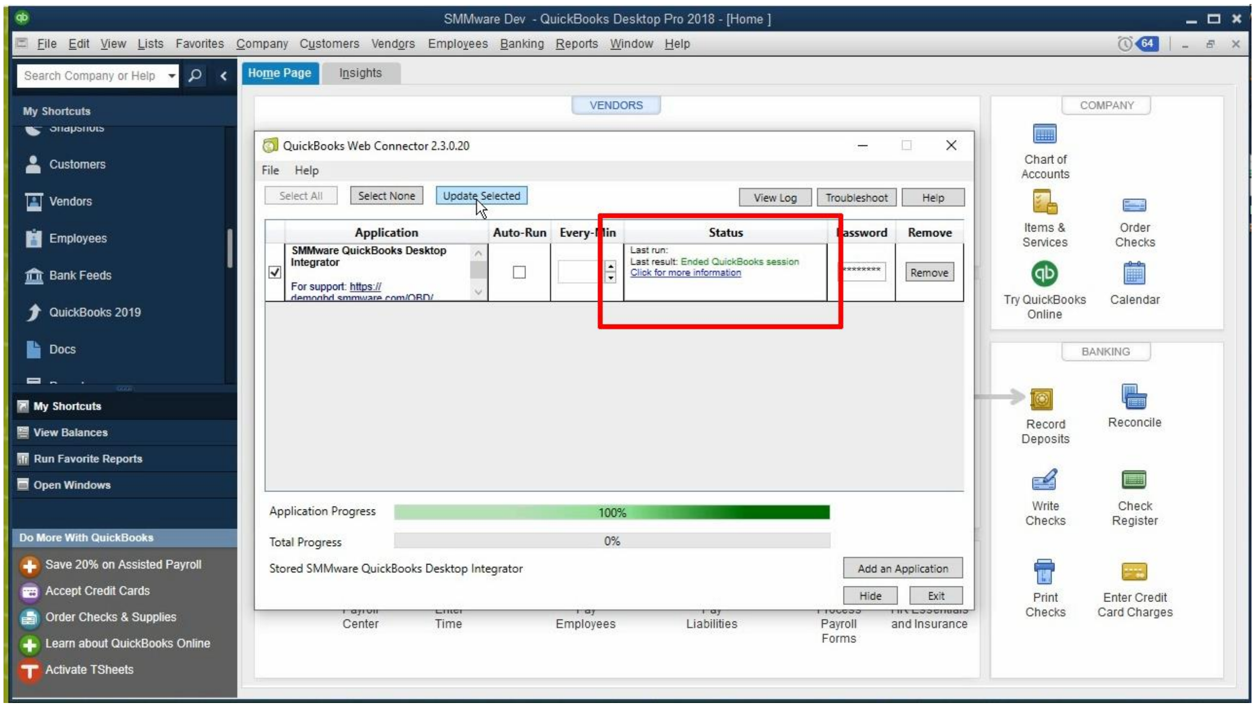


To initiate the synchronization, make sure the checkbox to the left of “SMMware QuickBooks Desktop Integrator” is checked, then click on ‘Update Selected”. QuickBooks provides a progress bar to help you monitor how much longer the process will take.



SMMware Dev - QuickBooks Desktop Pro 2018 - [Home]
File Edit View Lists Favorites Company Customers Vendors Employees Banking Reports Window Help
Home Page
Insights
QuickBooks Web Connector 2.3.0.20
File Help
Select All
Select None
Update Selected
View Log
Troubleshoot
Help
Application
Auto-Run
Every-Min
Status
Password
Remove
SMMware QuickBooks Desktop Integrator
Last result: Ended QuickBooks session
Click for more information
Application Progress
100%
Total Progress
0%
Stored SMMware QuickBooks Desktop Integrator
Add an Application
Hide
Exit
My Shortcuts
Customers
Vendors
Employees
Bank Feeds
QuickBooks 2019
Docs
View Balances
Run Favorite Reports
Open Windows
Do More With QuickBooks
Save 20% on Assisted Payroll
Accept Credit Cards
Order Checks & Supplies
Learn about QuickBooks Online
Activate TSheets
COMPANY
Chart of Accounts
Items & Services
Order Checks
Try QuickBooks Online
Calendar
BANKING
Record Deposits
Reconcile
Write Checks
Check Register
Print Checks
Enter Credit Card Charges

If there are no errors, you will only green in the status box, as shown below. If there were to be any errors, you would see text in a red font.



MailChimp Integration

YouTube	Watch our YouTube video about MailChimp (specifically, finding the api key and list IDS needed for integration) at https://youtu.be/oLRG7F-Q2iU (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)

MailChimp is a 3rd party service which provides mass email functions but also Marketing Automation. When integrated with MailChimp, SMMware can copy new items (and update existing) to MailChimp mailing lists ('Audiences' in MailChimp vocabulary), one each for Clients, Contacts, and Associates. Whenever you create or modify a Client, a Contact, or an Associate that information is sent to MailChimp automatically. You don't need to perform a separate step, but you will see a popup messages noting that the copying was done.

If you want to take advantage of the free account at MailChimp which comes with just one Audience, all three SMMware lists (Clients, Contacts, and Associates) can point to the same MailChimp Audience.

MailChimp allows you to use 'tags' to form up an email to a subset of the overall audience list. SMMware Contacts copied to MailChimp will have tags that match any SMMware categories they are assigned to. If the Contact has 'Refers Business to us' checkmarked, they will have a 'Refers Business' tag as well as their category tags. Clients will have a tag of ‘Current Client’, ‘Past Client’, or ‘Sales Lead’ as appropriate. Associates will have tags of ‘Active Associate’ or ‘Inactive Associate’. Tags are a powerful tool allowing you to target ‘all realtors’, ‘all senior living center’ etc. for your email campaigns. Be aware that when SMMware updates an existing audience member at MailChimp, SMMware matches the tags at MailChimp to the ones SMMware uses. **If you add tags used by SMMware directly in MailChimp, they may be deleted** the next time SMMware updates that audience member. If you want to add your own tags directly in MailChimp, just make sure they are different than the ones SMMware uses.

Once the integration is setup, you may have a blank audience at MailChimp if the account is new. You can have SMMware copy Clients, Contacts, and Associates to Mailchimp so that the audience is populated. First, make sure your Associate Profile has “Marketing Role Privileges”. This makes a new page available, Admin->MailChimp Commands. There, you will find the three commands for bulk copying to MailChimp. If you already had a MailChimp account and it is populated, **be aware that these commands update the tags at MailChimp including the deletion of tags** not used by SMMware. But these commands won’t duplicate an audience member or delete one.

MailChimp offers great Marketing Automation tools, and SMMware in combination with MailChimp form a powerful team.

To get the integration set up, we need a couple pieces of information from MailChimp. You can watch the video below to see where to find it. Or if you would prefer not to deal with it and feel comfortable sharing your MailChimp login, we’ll be happy to fetch the information for you.

The Public Contact Form, For Your Company Website

SMMware offers a contact form, which can be incorporated into your company website. Submissions are automatically entered into the SMMware database as a Sales Lead, emails are sent to your designated sales person and to the sales lead, and lastly, a Task is created for that Sales Lead and assigned to your sales person. It is protected against spam entries using Google Recaptcha technology.

You’ll want to work with the company who designed your company website to have them incorporate the form into your site.

While your new SMMware site is being set up, we’ll discuss a number of configuration options for this feature with you.

Exporting to Excel

To be specific, SMMware exports files in comma separated variable (CSV) format, with the .csv file extension. These files can then be imported into Excel or other applications such as Google Contacts.

YouTube	Watch our YouTube video about Exporting From SMMware at https://youtu.be/VfZ6t5vWWAs (if this link is broken because we’ve posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)

From the respective listing pages (as opposed to the editable page for a single item), you can export Clients, Associates, Organizations, and Contacts.

For Clients and Associates, whatever filter settings are in effect for the visible listing will also apply for the export.

For Organizations and Contacts, use the checkboxes towards the right of the screen at the category level and the individual entry level to indicate which items to export.

Appendix A: A Listing of All SMMware YouTube Videos (when this doc was last edited)

If we upload a new version of a video, it will have a new URL replacing the ones provided below. You can still find the new version by going to our channel and then browsing through the videos.

Our YouTube channel: https://www.youtube.com/SMMware

2 Min Introduction to SMMware 2021	https://youtu.be/qHXpmNGyJXA
Sales Tools	https://youtu.be/v9D133Qvn9g
SMMware on Mobile Devices	https://youtu.be/RdGgXphRewk
Clients and Jobs	https://youtu.be/cmrTdMto2K8
Associate Profiles	https://youtu.be/5NxoFEawB3Y
Time and Expense Entry	https://youtu.be/_aoh2sa1k3Q
Approval of Hourly/Expense/Mileage Items	https://youtu.be/rwNJ7RB20OU
Contacts and Organizations	https://youtu.be/QIUrrMnLSeU
Invoice Manager	https://youtu.be/vaQ2VNwLHkQ
Project Management: Tasks, Calls, & Notes	https://youtu.be/qIQkCcs6V_s
Schedule and Calendar (General intro)	https://youtu.be/cKBqnlZFNqA
Quickbooks Online Integration	https://youtu.be/iXBXYqo__-o
Finding MailChimp api key and list IDs	https://youtu.be/5xRR8t1Zr_4
Exporting to Excel	https://youtu.be/VfZ6t5vWWAs
Reporting	https://youtu.be/1aorxpajPRU
Consignment Sales	https://youtu.be/LW3jQaOsVx4
Image and File Handling	https://youtu.be/_CoutpoSkAI
iPhone Desktop Shortcut (creating one)	https://youtu.be/36S4WjDZKVQ

Appendix B: Job Codes, Explained

Intro: This appendix explains what the concept of “job codes” means in SMMware, and how it may be useful to you. In short, job codes allow you to charge a different hourly rate for different tasks (Packing, Organizing, etc).

In understanding a concept it is often helpful to understand the relevant history. The first and simplest approach to charging clients is to add up the hours, then multiple that total by a rate to arrive at the dollar amount.

However, what if you want to charge $60/hr for Packing, and $80/hr for work on Floorplans? If you hold a 3 hour consultation with a potential client and want to give the first hour free and then charge for the remainder, how should the software you use handle that? What if you want to charge $70/hr for time that you, as company owner, spend in packing, but $60/hr for time spent by your employees?

The concept of “Job codes” came about in response to the above questions. A “Job Code” is basically the combination of a label (like Packing), and an hourly rate. A job code also has a ‘ user level’ associated with it, which determines who can use that job code (All employees? Just Team Leads? Just the owner?)

Examples:
1) ‘Packing - Associate’: $60/hr,
2) ‘Packing - Company Owner’: $70/hr,
3) ‘Floorplans’: $80/hr

Job Codes are defined once in the system, and shared across all jobs. Each job does not have a separate set of job codes. The next page will help clarify by example.

There are two basic approaches to how you can charge a client in SMMware:
1) Using the same hourly rate regardless of task type
2) Using a different hourly rate per task type, labelled as ‘ job codes’

Example 1) Job Profile 1 (Client Jane Doe, Job ID 235, Downsize and Move)

Client Fee Model: **Per Job Rate**

Hourly Rate: $60/hr

~~Discount: 10%~~

Description	**Job Code**	**Rate**	**Hours**	**Subtotal**
Decluttering	Decluttering, $60/hr - 10% = $54.00/hr	$60.00/hr	10	$600.00
Organizing	Organizing, $60/hr - 10% = $54.00/hr	$60.00/hr	5	$300.00
Floorplan	Floorplan, $80/hr - 10% = $72.00/hr	$60.00/hr	20	$1,200.00
Packing	Packing, $65/hr - 10% = $58.50/hr	$60.00/hr	10	$600.00
Unpacking	Unpacking, $65/hr - 10% = $58.50/hr	$60.00/hr	10	$600.00

Example 2) Job Profile 2 (Client John Smith, Job ID 236, Downsize and Move)

Client Fee Model: **Per Job Codes**

~~Hourly Rate: $60/hr~~

Discount: 10%

Description	**Job Code**	**Rate**	**Hours**	**Subtotal**
Decluttering	Decluttering, $60/hr - 10% = $54.00/hr	$54.00/hr	10	$540.00
Organizing	Organizing, $60/hr - 10% = $54.00/hr	$54.00/hr	5	$270.00
Floorplan	Floorplan, $80/hr - 10% = $72.00/hr	$72.00/hr	20	$1,440.00
Packing	Packing, $65/hr - 10% = $58.50/hr	$58.50/hr	10	$585.00
Unpacking	Unpacking, $65/hr - 10% = $58.50/hr	$58.50/hr	10	$585.00

The same concept above for the rates you charge clients also applies to the rates at which you pay your associates.

1) They can be paid the same rate regardless of task type, with the rate being pulled from their associate profile. Each associate profile has its own rate so, for example, an experienced employee can be paid $25/hr and a new inexperienced one can be paid $20/hr. But they will get that rate regardless of task type.

2) They can be paid a different rate depending on task type, in which case the rate is being pulled from the job code.

But what if you want to BOTH pay associates different rates depending on AND different rates depending on their experience? This situation is more complicated, but SMMware can still handle it. The answer to this additional wrinkle is to have multiple SETS of job codes, one for experienced employees and one for the newbies. Employees are assigned to an experience level (Junior, Senior). Everyone within that group gets paid the same, but can be paid differently per task type.

Even though your specific scheme for charging clients and paying associates may get complicated, once we set it it up in SMMware it is still easy to actually use because the different groups only see the appropriate options.

FAQs

Q1) Do I have to choose one approach and then use that for every job?

A1) No, one particular job can charge the client based on one overall hourly rate, while another job can charge based on job codes. The choice is made in the Job Profile for each job.

Q2) Can you clarify the difference between the concepts of “Job Types” and “Job Codes”?

A2) Each job has one and only one “Job Type” assigned to it. The job type is intended to describe the overall goal of the job. Various kinds of tasks can be involved. For example, a “Downsize and Move” job may require 5 or more job codes to describe the various kinds of work involved, like “Packing” and “Floorplan”.

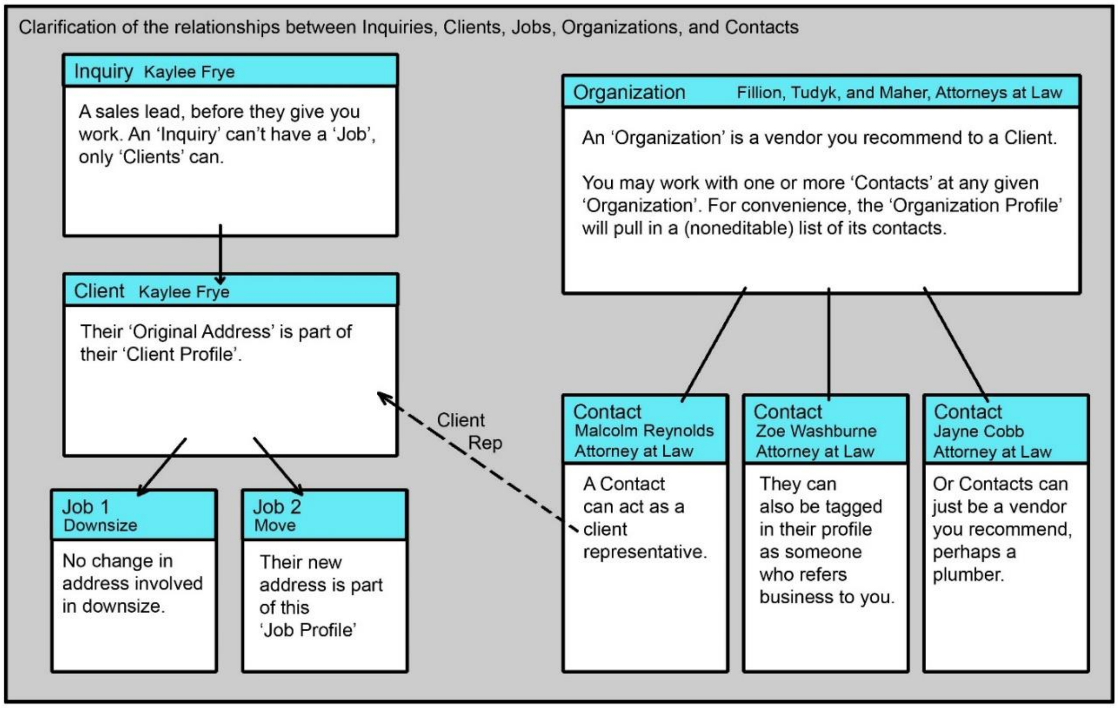
If the overall goal of a given job is very simple, like “Packing”, then it may only call for a single job code (like “Packing”). At that basic level, job codes do in fact become redundant, and you could just use the single hourly rate approach, without job codes.

Q3) For packing materials, do I use job codes?

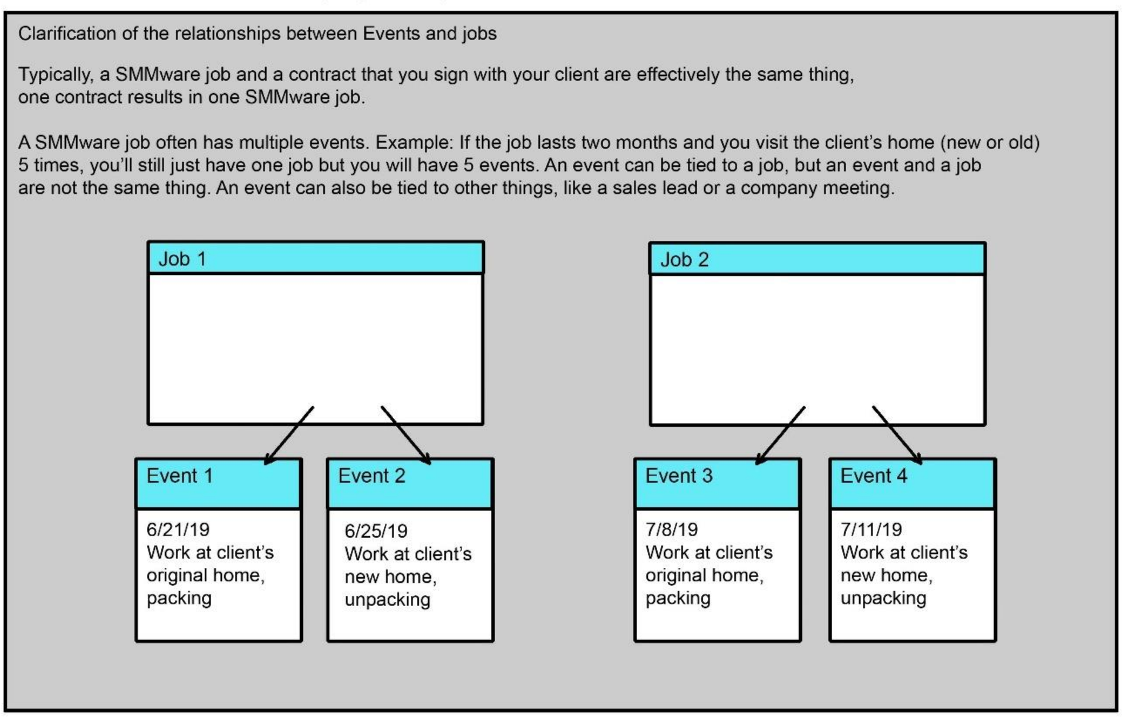
A3) No, job codes only apply to hourly work, and are a way to indicate the hourly rate to charge. If you want to account for packing materials on a box by box basis, you can use SMMware’s “Inventory” command. If you feel that it is too much effort to track each box and want to charge a single blanket fee for packing materials, you can use SMMware’s “Flat Fee” command.

Appendix C: Basic Relationships in SMMware

SMMware Basic Relationships



SMMware Basic Relationships (Events)



Appendix D: Address History Explained

SMMware maintains a history of addresses where your client has lived, which can be thought of like a layer cake. When you first meet a client, that address will be stored in their client profile as their "original address", the bottom layer.

Each job you do for the client adds a layer to the cake. If that job involves moving, you enter an address into that job and it adds an address to the history. If the job does not involve moving (Just a floorplan), then you leave the 'New Address' address fields for that job blank and it doesn't affect the address history.

Your ongoing job (Job 183, below) will hold the address they are moving to. The last job that involved moving can be assumed to be the current address.

When your ongoing job, has its status changed to 'Work Complete', the system will now label Address 4 as the 'current' address (None of the entries are labelled 'Move-to').

The label in the address history for Intermediate jobs (like Job 114 below) is just the job number: "Job 114".

In the Client listing and search results, the address used is the 'current' one.

Appendix E: Permissions in SMMware

Many permissions are controlled on a user by user basis, either by the 4 'Role' related permissions or the 8 "Manage..." permissions, described in the next two sections. Any access not addressed user by user are based on overall 'Admin Level' (set in the field of the that name). For example, the Settings Editor is avialable to users with 'Admin' level access or higher.

These default levels offer some configuration levels. For example, team leads can be reduced to 'view' for Organizations and Contacts, or for example 'None' for invoices. While 'Admin', 'Senior Admin' and 'Company Owner' levels are redundant by default, their existence allows flexibility of configuration.

	Basic User	**Team Lead**	**Admin**	**Senior Admin**	**Company Owner**
Associate Profiles	View*	View *	Manage	Manage	Manage
Job Profiles	View **	View **	Manage	Manage	Manage
Client Profiles	View **	View **	Manage	Manage	Manage
Organizations & Contacts	View	Manage	Manage	Manage	Manage
Time & Expense Entry	Self	Self and others	Self and others	Self and others	Self and others
Flat Fee Entry	None	Manage	Manage	Manage	Manage
Invoice Management	None	Review	Manage	Manage	Manage

* View privileges regarding Associates means name, email and phone number (not hourly rate, hiring date, nor address)

** View privileges regarding Jobs and Clients refers to the base profile information, but does still permit adding Tasks, Notes, and Calls to that profile.

Sales Role Privileges	Read/Write' means that the user can see ' Sales' in the main menu, and can manage Sales Leads.
Scheduling Role Privileges	Read' means that the user can see the Master Calendar in the menu and view it. 'Write' means they can manage the entries.
HR Role Privileges	This relates to associate profiles. 'None' means that the File Manager won't appear, 'Read/Write' means the user can manage it.
Marketing Role Privileges	This role allows you access to MailChimp related functions (see Admin-> MailChimp Commands).

The 8 "Manage…" fields

Below are the default assignments for the 'sub-permissions' when you change the 'Admin Level' field

	Basic User	Team Lead	Admin	Senior Admin	Company Owner
Jobs (& Clients)	View*	View*	Manage	Manage	Manage
Flat Fees	None	Manage	Manage	Manage	Manage
Organizations & Contacts	View	View	Manage	Manage	Manage
File Shares	View	Manage	Manage	Manage	Manage
Invoices	None	View	Manage	Manage	Manage
Approve Invoices	No	Yes	Yes	Yes	
Consignment	No	None	Manage	Manage	Manage
Inventory	No	None	Manage	Manage	Manage

* View privileges regarding Jobs and Clients refers to the base profile information, but does still permit adding Tasks, Notes, and Calls to that profile.

QuickBooks Online Admin, QuickBooks Desktop Admin, Google Admin

If your user has 'Company Owner' permission level, then below the rows for the 8 'Manage...' fields you will see a row for QBO Admin, QBD admin, and Google admin permissions.

These settings determine whether the user being edited can use the functions in SMMware for QBO, QBD, and Google.

Appendix F: Examples of Custom Field Usage for Clients and For Jobs/ Sales Leads

Custom fields for Client profile should address information that is still true even after they move. For example, a field "Mobility Aids" provides a place to record if the client needs a cane or wheelchair, and if they used one prior to moving, they will presumably still use one afterwards.

Custom fields for Job profiles should address information that is specific to a location. For example, an elevator code.

Examples, Custom Fields for Client Profiles

- Referred to
- Assessment Date
- Intake complete
- Inquiry call taken by
- Date of Inquiry
- $ Estimate Value
- Health Issues

- Mental Acuity
- Mobility Aids
- Reason for move
- Reason for calling
- Clutter level: 1-5
- Pet information
- Birthdays
- Call After (AM)
- Call Before (PM)

Examples, Custom Fields for Job Profiles

- Realtor Name
- Gate code
- Floorplan (Y/N)
- Mover Hours
- Cleaning Hours
- Handyman Hours
- Basement/Locker Items? (Y/N)
- Garage Items? (Y/N)
- Shed Items? (Y/N)
- Off-site Storage? (Y/N)
- Attic Items? (Y/N)
- Items Other Loc? (desc)
- Selling Hours? (Y/N)
- House Listed? (Y/N)
- Sold Conditionally? (Y/N)
- House Sold? (Y/N)
- Garbage Day