



## SMMware, Quick Start Guide v4.7

This document helps you understand and prioritize the Settings in SMMware, and is designed to get new subscribers up and running with SMMware. We recommend several phases in your SMMware adoption; don't try to use every feature from day one. Perhaps scheduling is your first area to focus on, or maybe hours and invoices. Some settings should be considered right away, and others can be refined later as you become more familiar and comfortable with SMMware. However, these are not hard and fast rules, feel free to deviate from the suggestions below if you feel comfortable to do so.

### Contents

SMMware, Quick Start Guide v4.7.....	1
Welcome .....	3
List of Learning Resources .....	3
For Mobile Devices: Adding 'Desktop' icons.....	3
Associate Profiles.....	3
The Settings Editor.....	3
Settling In, Making Your SMMware Site Your Own .....	4
Phase 1: Settings To Decide On Right Away .....	4
Phase 2: Settings To Consider Early On, But Which Can Be Changed Relatively Easily .....	5
Phase 3: Settings to Help Optimize.....	5
QuickBooks Integration, and Data Import .....	6
Import of Existing Records From Other Than QuickBooks .....	6
Adding Your First Records.....	6
Appendix A: Some Basic Concepts.....	7
Clients, Sales Leads, and Jobs .....	7
Job Type .....	7
Job Codes .....	7
Appendix B: SMMware Design Philosophy.....	7
Appendix C: Settings That Change Over Time, With SMMware Keeping A History .....	8
Appendix D: Advice on Calendar Tags .....	8
Appendix E: FAQ .....	8



## Welcome

Welcome to SMMware! As a new subscriber, this document will help you to quickly get up and running with your SMMware system. At this point, your site is presumably created, and a Company Owner level login has been provided to you.

## List of Learning Resources

You can learn more about SMMware by

- watching any of ~30 videos at our YouTube channel, <https://youtube.com/smmware>
- downloading our three manuals (Admin, Team Lead, Team Member) from <https://www.smmware.com/manuals/>
- checking the help pages within SMMware, via the Help button at the right end of the main menu.
- Follow us on Twitter, @SMMware
- Join our FaceBook Discussion Group, <https://www.facebook.com/SMMwareLLC>
- And lastly, you can take advantage of our live one-on-one training and support

## For Mobile Devices: Adding 'Desktop' icons

On mobile devices, it is very handy to have an icon on the 'desktop' to tap on to enter SMMware. Since SMMware is a website, you do have to create the icon yourself, but it is quite easy and should only take a few minutes. We highly recommend that you do this on Day 1, and that your associates do so as well, as soon as possible.

Our video for iPhones and iPads	<a href="#">"Desktop Shortcuts for iOS devices"</a>
Our video for Android phones and tablets	<a href="#">"Desktop Shortcuts on Android"</a>

## Associate Profiles

Associate Profiles are found by navigating the main nav to 'Associates' -> 'Associate Manager', and then clicking 'Add New' for a new profile, or clicking 'Edit' for an existing profile.

Usernames/passwords are assigned here. They can be shared with the Associates via email (outside SMMware), or otherwise as convenient. They can change their passwords from the login page using the 'Forgotten Password' function.

Various permissions are set in the Associate Profiles, determining whether they have access to the Master Calendar, to Jobs and Clients, and more.

## The Settings Editor

The Settings Editor, found at Admin->Settings Editor, allows you to change a wide variety of SMMware's configuration options. Here you can customize your SMMware environment to your needs.

## Settling In, Making Your SMMware Site Your Own

In Section '1) Basic' of the Settings Editor, the first item allows you set your company name. This appears in emails to employees, such as assigning them to events. But more importantly, it appears when you email a Quote or Invoice to a client.

In Section '18) Theme Editor' of the Settings Editor, you can set the look and feel of the site (header image, colors). Use the 3<sup>rd</sup> party image editing tool of your choice to create your header images, and then use SMMware's Theme Editor to upload them. Every SMMware subscription comes with one complimentary theme, so if you aren't familiar with tools like Photoshop, contact SMMware support and we'll use your corporate website and logo to create a distinctive theme just for you.

## Phase 1: Settings To Decide On Right Away

A few of these you'll want to decide on because they can't be changed later. Others, you'll want to decide on because you'll need to use them right away.

Some settings have thresholds after which they cannot be changed, and you will want to review those at an early stage. For example, you can choose to enter hours in 'Start/Ending Time' or 'Total Hours' format\*. Once the first hours entry has been made, this setting becomes uneditable.

Here is a list of such Settings that are best considered early on, and any thresholds where they become uneditable, if applicable.

- QuickBooks Integration
- Hours Entry format ('Start/Ending Time' or 'Total Hours' format), can be edited until the first hours entries are made.
- Job Codes (if in use). See our document "[Job Codes Explained](#)"
- Travel Pay (If associates receive pay based on distance travelled)
- Image Tags
- Categories (For Organizations and Contacts)
- Calendar Settings. You'll want to configure the "Event Tags", particularly regarding their mapping to 'Jobs', 'Sales Leads', etc. See Appendix D: Advice on Calendar Tags.
- Invoice number for first invoice. When your first invoice is created it uses this number, after which it wouldn't make sense to edit this setting, so it becomes uneditable. Future invoice numbers are sequential.
- Login Session Length (can change anytime)

\* 'Start/Ending Time' provides one field for the start time and one for the ending time ( 9am-3pm for example), and calculates the resulting hours (in this case 6). The 'Total Hours' format provides a single field where you enter the grand total hours for your entry ( You simply enter '6').

## Phase 2: Settings To Consider Early On, But Which Can Be Changed Relatively Easily

These are all 'cookie cutter' type settings. The default values you set are copied to the actual entry, such that when the setting is changed later, only new entries are affected. The sections below are all within the Settings Editor.

- Whether to use approval for hours and expense entries (Section 2)
- Invoice signature and late notice (Section 3)
- Calendar: Default mode for attendee management (Section 4)
- Categories for Organizations and Contacts (Section 10)

## Phase 3: Settings to Help Optimize

These are settings to consider after an initial settling in period. Some are functions which are useful, but secondary. Some help save time. What they have in common is that they can all be added or changed at anytime. These can all be found in the Settings Editor.

- Client Listing: When you look at the list of clients in the Client Manager, you will see all clients, regardless of whether they are current clients, or someone you haven't worked with for five years, which can feel very cluttered. In the 'Clients/ Sales Leads /Jobs' section, you can change the default filter for the Client Manager to only show you active clients and sales leads, allowing you to focus on the here and now. To find past clients, you can of course still use the filter in the client listing page. Or use the search bar.
- Activate 'Custom Fields', for Clients and Jobs. These are useful to store information like whether a client uses a mobility aid. Or the code for the elevator. See our document [Custom Fields Usage](#) for examples and ideas for how this can be useful to you.
- Activate Team Lead Approval of Hours and Expenses. See the 'Hours/Expenses/Fees/Supplies' section for the item 'Require Approval of Hours/Expenses/Travel Time Entries'. If used, hourly entries must be approved in order to appear in Invoices.
- Activate Team Lead Approval of Invoices. Involve the Team Lead in approving invoices, since they were on site and know which employees were there and what was done. See the 'Invoices' section of the Settings Editor.
- MailChimp Integration
- Google Calendar Integration
- Job Types
- Invoice Signature, in the Settings Editor

These are all 'cookie cutter' type settings. The default values you set are copied to the actual entry, such that when the setting is changed later, only new entries are affected. The sections below are all within the Settings Editor.

- Hours Presets, Expense Presets, Flat Fee Presets (Section 2)
- The Legal Language block for Quotes (Section 2)
- Notes Presets (Section 8)
- Default note for StatusBoard Ops (Section 14) and StatusBoard Sales (Section 15)
- Task Group Presets (Section 17)

## QuickBooks Integration, and Data Import

If you will be using the integration between SMMware and QuickBooks (either QuickBooks Online or QuickBooks Desktop), you'll want to do so early on so as to quickly populate your SMMware site.

If you follow along with the applicable 10 minute video below, by the end you will have connected to QuickBooks and imported clients, vendors (organizations) and associates into SMMware:

For QuickBooks Online:	<a href="https://youtu.be/pl8HZb3lndA">https://youtu.be/pl8HZb3lndA</a>
For QuickBooks Desktop:	<a href="https://youtu.be/s624CLHHE8g">https://youtu.be/s624CLHHE8g</a>

Also see the sections on QuickBooks Integration in our [Admin Manual](#) for detailed help with set up. If desired, SMMware support staff will also be happy to work with you both to set up the communication between the two, and the import of initial data from QuickBooks into SMMware.

## Import of Existing Records From Other Than QuickBooks

If you have existing records to import from systems other than QuickBooks (such as Google Contacts, Insightly, etc.), use our content importer. Find it by navigating to Admin->Import Content. A typical example of such data is a list of Senior Living Centers. See the Help Page within SMMware for the Import Content command for more details.

1. Export a CSV (comma separated variable) file from your existing system.
2. Open your file in Excel and paste in the header labels from our example templates and save it (make sure it is still in CSV format, not 'xlsx'). The Import Content page has links to our example templates.
3. Use our Import Content page for the actual import.

If you are not comfortable with this process, contact SMMware support. Every SMMware subscription comes with a complimentary initial round of content import.

## Adding Your First Records

These are the records that allow you to start making use of SMMware, and you'll want at least a few records of these various types. Some of these may have been imported en masse (from QuickBooks, or from other source).

- Associates
- Clients
- Sales Leads
- Jobs
- Organizations/Contacts
- Invoices – See the SMMware Admin Manual

## Appendix A: Some Basic Concepts

### Clients, Sales Leads, and Jobs

The Client Profile is the 'parent' record, and can have 'child' records of types Sales Leads and/or Jobs. The Client Profile holds basic information about the Client, such as first and last names, phone number, or whether they have a Client Representative.

The Sales Lead Profile holds information about a sales lead. In addition to a tool for writing a quote (the document of what you will do and how much it will cost), the Sales Lead Profile is also a place to write Notes, assign Tasks, store info in Custom Fields, and upload documents/images.

The Job Profile is used once you have won the work. When entering hours and expenses, these items have to reference a job. A job corresponds to a contract you sign with your client.

Sales Leads and Jobs are separate from the Client Record because over time you may do work for a given client multiple times, and you want each effort to have its own 'bucket' where you can keep information separate.

### Job Type

A job type is envisioned as a short description that is suitable for explaining the job to someone else in your industry ("We did an Estate Clean Out for the Smith family"). If you are applying a single hourly rate across the entire job (as opposed to using Job Codes), each Job Type allows you to set a default hourly rate.

### Job Codes

A fundamental question is the rate to charge for a given hours entry. See our document "[Job Codes Explained](#)" for a full explanation. Within a given job, if the rate is the same, then that is the straight forward approach. If different rates are charged in a given job, you'll need 'Job Codes'. Here are some circumstances that may lead you to charge a different hourly rate (within one job).

- One rate for the time of the owner, a second for team leads, and a third for a team member
- One rate for one task (Packing), and another rate for a different task (Floorplan work)
- One rate for on site time, and another rate for travel time charges

To set up Job Codes, use the Settings Editor (Admin->Settings, Section 6, Job Codes).

## Appendix B: SMMware Design Philosophy

A filter section is found at the top of many pages, to let you display a subset of an overall list (such as clients). These filters have default settings.

SMMware is built with the idea of helping you focus on what is current:

- Clients, default listing: Only shows you current clients
- Jobs, default listing: Only shows you active jobs

- Hours and Expenses listing: Only shows you entries for ongoing jobs. Once the job closes, entries can still be found using the “My Hours/Expense/Mileage History” command.
- Sales leads default listing: Only shows you Sales Leads you are working on, or where you are waiting to hear back from the client

Naturally all of the old records are still in the system and are easy to find. They just aren’t shown to you by default since they aren’t the ones needed on a daily basis.

### Appendix C: Settings That Change Over Time, With SMMware Keeping A History

These records have rates that change over time, and SMMware has a record for the effective date and the rate each time there is a change.

- Job Codes (Prices)
- Associate Hourly Pay
- Travel Pay/Charges

### Appendix D: Advice on Calendar Tags

The calendar tags use the color of the events to tell you something about that event.

While other approaches are no doubt possible, here are the three common ones we’ve seen used.

- 1) Use two of the tags, one labelled ‘Sales Leads’ and one labelled ‘Jobs’. With this approach, the color tells you simply whether the event is part of a job or part of a sales opportunity.
- 2) Still have a ‘Sales Lead’ tag, but break the ‘Job’ tag out into separate tags, where each tag is for a kind of work, like ‘Packing’, or ‘Unpacking’. Note that the system allows for up to 11 tags total.
- 3) Compared to approach 1, still have a ‘Sales Lead’ tag, but break the ‘Job’ tag out depending on who the Team Lead is. For instance, you might have ‘Nancy’, ‘Jane’, and ‘Rob’ tags to match your list of Team Leads. One glance at the calendar tells you who the team lead is for a given event.

Note, we recommend that you ‘hide’ the calendar tags you are not using, just to keep things tidy.

### Appendix E: FAQ

Q: What is an ‘active client’?

A: Active Clients are those which have at least one active Job. If a client has a Job which is Closed, they are no longer active. If they have one or more Sales Leads but no Jobs, they are still a Potential Client, not yet an active one.

Q: Why did my new client record disappear?



A: The Client Manager (Clients/Sales -> Manage Clients) has a filter at the top and by default it gives you a listing of active Clients. As above, active Clients are those which have at least one active Job, and if you created a Client Profile but didn't create a Job for them, they aren't active and won't show in the default listing. They are still there and you can adjust the filter for status='Stray' to find them. Or you can just search for them by last name in the search bar.

Q: Why do I create a Client Profile for a sales lead?

A: In SMMware, a Client Profile should be thought of as being for a 'Current Client' and a 'Past Client', but also applies to a 'Potential Client'. It is common to work for the same Client multiple times, and you do not want to enter their basic info (first and last name, cell phone number) every time, you just want one record for this information. That record is the Client Profile.

Q: What is the difference between a Job and an Event?

A: A Job typically has a one to one correlation with the contract you sign with the Client; one contract results in one Job in SMMware. Each time you visit a Client's home is considered an Event on the Master Calendar, and over the course of one Job it is typical to make multiple visits, to have multiple Events.

Q: What is the difference between a Task and an Event?

A: An Event has a specific time and probably a specific place, such as when you visit a Client's home "next Thursday at 10am". A Task has a due date, such as needing to arrange for a moving company by the end of the month. But for a Task, if you have some free time a week before the end of the month, you might take care of it well ahead of the due date.