SMMware Subscriber News

June 6, 2018,

On Thursday, SMMware will update your site with a number of revised features, as detailed below.

- The Status Boards
- Simplified Editing
- Roll Up Format For Invoices
- Autofilling of Addresses
- HTML Field for Training Page and Standard Documents Page
- Optional Portraits

The Status Boards

This is a great new feature that lets you gauge the health of your company for sales or ops. The color coded icons make it easy to take in status at a glance. If it turns out that they are not a good fit for your company, you can ask for them to be disabled.

Simplified Editing

SMMware has in the past used a 3 step process for editing, 1) The edit screen, 2) The confirmation screen, 3) The save/completion screen

Based on user feedback, we've removed the validation step in the middle for most commands; There is now a 'save' button on the edit screen. For many commands you just stay on the same editing screen after a save.

Roll-up Format For Invoices

There is now a third format for invoices, called the 'roll up' format. In the detail format, there can be many entries for a given day. Under the roll up format, there is only one entry that sums up the days hours and one for mileage. This was a frequent enough request that we thought it worth including.

Autofilling of Addresses

If your clients are frequently moving to senior living centers, you can now save yourself some cutting and pasting of addresses. There is now a dropdown of senior living centers, and picking one will fill in the address. All you have to do is enter the unit number! Another client suggestion put into action.

HTML Field for Training Page & Standard Documents Page

The training page now has an HTML editor field so that you can put in your own text (including hyperlinks and embedded YouTube videos). It still has the file manager section for any documents you want to share. The Standard Documents page was also given an HTML editor field so that you can put in whatever notes you like about your standard documents.

Optional Portraits

The portrait images in associate, client/inquiry and contact profiles are now configurable, and they now default to 'off'. This feature hasn't been heavily used but takes up significant screen space, so we made it optional. If your company wants to use them, just let us know and we'll reactivate them.

As always, thank you for your business, and if you have questions please don't hesitate to contact me.

Thanks.

- Brian Jacobs

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