



## SMMware Subscriber News

Nov 26, 2018,

### **Announcing the new SMMware referral program**

If you recommend SMMware to someone who goes on to become a client, you will get a free month of SMMware. The offer becomes valid when the new client stays past their initial free month.

Also, the offer applies to as many new clients as you recommend, there is no limit to the number of free months the referring SMMware client can receive. If you refer 12 people who go on to become SMMware clients, you will indeed get a free year of SMMware.

Someone asked me about posts to the NASMM forum. If someone posts to the forum asking about which software to use, you respond recommending SMMware, and it results in someone becoming a client, that does qualify as a referral.

This referral program takes effect immediately and is currently scheduled to expire February 28, 2019.

\* Note, only one existing SMMware client who recommends SMMware to the new client or responds to a post will receive the free month, based on first recommendation. The offer will apply to new clients signing up before the program expiration.

### **QuickBooks Desktop**

The integration with QuickBooks Desktop is well under way and I currently anticipate a release date in the first week of January. After that, you'll see an uptick in other non-QBD revisions.

## Recent SMMware revisions

- **Clients- Client Reps.** When you create a new client and they have a client rep, you can now create the client rep right from the client profile. Just click on the '+' button next to the client rep dropdown. Previously you had to create a contact profile for the client rep first, prior to creating the client record.
- **Restricted File Manager:** The client/inquiry and job profiles now have a second file manager labeled "Restricted" which can only be seen by users with admin and sales role permissions. This was added in response to requests for a place to put sales estimates, contracts, and invoices that cannot be seen by regular users.
- **Invitation Type Events:** You can now do multiple rounds of invitations. This has been requested a number of times.  
Example: You need three people, you invite the three 'first choices'. Two can make the event, one can't. You edit the event and uncheck the person who can't attend (gets 'cancelled invite' email), you check another person to invite (gets 'invite' email). Repeat until the team is full, at which point you formally assign them to the team.
- **Calendar Popup Scrolling.** When selecting a date, the calendar popup no longer scrolls due to mouse movement. It was judged more trouble than help due to unintentional scrolling of dates.
- **Regarding Logging In.** When your login times out and you log in again using the form, the information you had in the form was preserved and whatever action you had been trying will complete. Ex: You partially fill out a new client profile and get interrupted. Later you finish entering info and hit 'Save'. You'll get a login form and click 'Login', at which point your new client profile will Save, without losing the info you had typed in.
- **Images, Scrolling.** When you are working with images and the page has to reload, it now jumps down to the File Manager section (when uploading or editing images) or to the specific image (when rotating an image) saving you from scrolling.
- **Payroll Report:** The payroll report now lets you filter the results to show or not show hours, and the same for expenses and travel.
- **Job Profiles:** In Job Profiles, four of the existing custom fields now require 'admin' level permissions to see/edit. This was in response to a request for "Estimate Amount" and "Invoiced Amount" fields that normal users wouldn't be able to see. These fields are highlighted as a way of indicating they are different than the regular custom fields.

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

Thanks.

- *Brian Jacobs*

P.S. Note: SMMware reserves the right to alter or end this referral program at our discretion, via notification by but not limited to email.

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