SMMware

SMMware Subscriber News

Feb 2, 2019,

Announcing "SMMware University" (SMMware-U)

SMMware will be offering free group training webinars for existing clients.

Our presentational webinars provide an overview of SMMware features geared towards potential clients, covering everything in just under an hour. By necessity these webinars move pretty quickly, highlighting features but not doing a complete run-through per feature.

In contrast, SMMware-U is focused on you, existing subscribers, covering less material per session but taking the time to fully demonstrate a feature, along with time for you to practice the task yourself, on your own SMMware site. Here you can feel free to ask detailed questions.

You may have multiple people attending per company and can attend multiple sessions. We will continue to offer our presentational webinars. You are still welcome, and encouraged, to contact me about one-on-one training sessions. But for those who prefer to work within a group, we hope that this option will be of interest.

You can also get training and have questions answered during the NASMM expo, pretty much any time the expo showroom isn't open.

Prerequisites:

* Your own SMMware site, to do your work in.

* Ideally, two screens (perhaps a laptop plus desktop, or desktop plus tablet, etc). One screen is to follow the webinar, the other screen to work within your own site. It is possible to work with one screen and flip between browser windows, it just is not as convenient.

* Please have some data to enter into the system: Inquiry and Client info, hours, events. Perhaps some tasks.

* Ideally, prior to the class, your SMMware site should be configured for the areas we will be working in. Example: If you are using job codes, we'll want those in place for entering hours.

Curriculum:

* Session 1, Sunday, February 24th, 8:00PM EST:

https://smmware.webinarninja.com/live-webinars/84048/register?in_tok=b17e7061-256d-42c1-a08e-4209a53d2dce

       * Entering Inquiries, Clients, & Jobs

       * Entering Associates

       * Entering Hours & Expenses

       * Entering Organizations & Contacts

* Session 2, Tuesday, February 26th, 7:00PM EST:

https://smmware.webinarninja.com/live-webinars/84050/register?in_tok=e4e00170-66c6-44d7-a992-34ae2a49b455

       * Scheduling

       * Tasks & Notes

       * Invoicing

       * QBO Integration

       * QBD Integration

QuickBooks Desktop

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

Recent SMMware revisions

Many of the new features in SMMware come from you, SMMware subscribers. We welcome your suggestions and are grateful for them, and the result we hope is a better product for everyone. Below are the most recent revisions.

- To improve user experience on some mobile devices, revisions were made to prevent the phone/tablet built in keyboard from popping up & covering the date & time popups provided by SMMware.
- Added a "Map" link next to addresses. Note: When inserting an address into an event description, there is now a '[map:]' code (Example: [map: 123 Some St. Buffalo, NY]), which you just leave in place.
- The Master Calendar can have the attendees initials listed in the short description, the one that is always visible in the calendar (not the popup). This option is off by default.
- There is now an option for the File Manager such that documents (PDF, Word, Excel) can be tagged. The option is off by default.
- Also for the Master Calendar, the "Associate" filter drop down shows you only events which the selected associate is an attendee for.
- Added configurable default values to the Status Board text fields, which is very useful for consistently collecting the same information.

  Ex default value for Sales: "Stage: | Follow up: | Lead Salesperson: "

  Ex usage for Sales: "Stage: Quote delivered | Follow up: They prefer email | Lead Salesperson: Tammy"

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

Thanks.

- Brian Jacobs

P.S. To be automatically informed when new YouTube videos are posted, click here to visit our YouTube Channel and subscribe. You may also need to click on the 'bell' icon in the upper right. The latest version of the manuals can always be found at http://www.smmware.com/manuals