SMMware Subscriber News

April 9, 2019,

Server Migration

To accommodate the increasing number of SMMware sites, we are migrating to a new server. There will be planned site maintenance this Saturday, April 13, from 8pm – midnight, EST. Any one SMMware site will only be down for 5-10 minutes, but we are asking for this longer window so as not to have to make a precise site by site schedule. However you are welcome to request a specific timeframe if you wish.

For the curious: The new server has 75% faster CPUs and more of them (4 processors instead of 2), and 4x the memory. Also (my personal favorite new feature), the new server uses Solid State Drives (SSDs), which are more responsive than the traditional 'spinning disk' hard drives. The technology is like that in a 'thumb drive' (if you had a really big thumb). The bottom line, we just want you to know that as we grow, we are investing in infrastructure, and not just overloading what was already in place. This server is expected to be in service between one and two years.

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New Calendar Feature: Colors Per Event

Note: This feature will be rolled out at the same time as the server migration.

You are now able to choose the color for a calendar event. A color picker is now in client profiles, job profiles, and event profiles, with 27 colors to choose from. The first option in the color picker (white, with the letter 'D' means 'Default' as in, "don't override the default color".

This has been a popular request, and we hope that this new feature does the trick.

If you like to keep it simple: Just know that when you set the color from within an event profile (editing or adding an event from the Master Calendar), that color will be used for that event in the calendar.

If you are a Power User: There is a hierarchy that determines the color used in the calendars.

- By default, the color used by a calendar event comes from the event tag (job tag, associate tag, client/inquiry tag, company tag, etc.)
- Setting a color in a client profile overrides the default color from the event tag
- Setting a color in a job profile overrides a color set in the client profile.
- Setting a color in the event profile overrides everything else.

This system means that if you want all the events for a client to share the same color, you can set the color in one spot (the client profile) and all their events will share that color. Similarly, if you want all the events for a job to share the same color, you can set the color in one spot (the job profile).

Lastly, in the calendar popup for an event: If the event is tagged for a job, there is now a "Job Profile" hyperlink, and if the event is tagged for a client/inquiry, there is a "Client/Inquiry Profile" hyperlink.

Final Note: QuickBooks Online

QuickBooks Online changed the way that 3rd party integrations (like a SMMware site) proves who they are to QBO, and this change is also part of the server migration. Mostly this is a 'plumbing' issue that is out of sight. But here is what you as a SMMware subscriber will notice: we took this opportunity to improve our connection process such that you'll stay connected instead of needing to connect on a regular basis. Lastly, we also improved our error messages should one occur.

We hope you find these new revisions useful.

Based on your feedback, SMMware continues to evolve to better serve Senior Move Managers, and we continue to welcome your suggestions.

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

Thanks.

- *Brian Jacobs*