



SMMware Subscriber News

Feb 21, 2020,

Coming soon: Sales Estimates (Important!)

SMMware will shortly have a Sales Estimate feature.

Important! This will affect the program flow for sales leads

Current flow, when a sales lead comes in:

- 1) Inquiry
- 2) Client

New flow:

- 1) Create a Client record (applies even though this is a sales lead)
- 2) Create the Estimate

Notes:

The Inquiry Manager will be replaced by the Estimate Manager in the main menu.

In addition to the obvious advantage of being able to create estimates, the new flow offers several improvements:

- 1) When an existing client comes back with more work, you can just create the estimate for the new work. There isn't a question of whether they are a client or an Inquiry.
- 2) If you upload files to the File Manager in an estimate, they will be shared with a job created from that estimate. Under the current system, files uploaded to the Inquiry profile wind up in the Client profile even though the ideal place would be the Job Profile.
- 3) The handling of the 'move to' address will be more intuitive. The current approach of entering a 'Tentative Address' into the Inquiry Profile is the most common source of confusion.

To make the transition as seamless as possible, when we launch the Estimate Manager, we will create an initial blank estimate for each of your Inquiries and then convert those Inquiries to Clients.

We regret any short term confusion that may result from this change, however we are confident that you will consider the advantages of the Estimate Manager to be well worth while.

There will be a YouTube video providing a tour of the changes ahead of the launch.

We currently anticipate **launching the Estimate Manager the weekend of March 7th/8th**.

There will be at least one more email about this prior to launch, confirming the launch date.

We hope you find this new revision useful.

What's Next

Google Calendar integration.

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*