



## SMMware Subscriber News

March 13, 2020,

### **Estimation Manager | User Group Meeting Two recent revisions | Login Bugfix | Next Steps**

#### **User Group Meeting**

Eleven people attended our first SMMware User Group meeting at the NASMM expo, which was particularly good considering the short notice. Next year I'll provide more advanced notice. We met for about an hour and it was very productive. I am extremely pleased to say that 32 suggestions were made for future development of SMMware. Some are small tweaks to existing features, some are more significant but all are great ideas. SMMware is shaped by the needs of Senior Move Managers and your suggestions are both welcome and vital. Also, congratulations to David Feldman of Home Again Transitions, the winner of our iPad give-away.

Thank you to all who participated for your input.

#### **Estimation Manager**

The launch of the Estimation Manager is delayed by just one week, and will be on Saturday the 21st. I wanted to make a few more tweaks to it, plus I promised that you'd have access to a YouTube video tour prior to launch. I will upload the video on Tuesday the 17<sup>th</sup> at the latest.

#### **Scheduling: Events**

One of the requested changes from our User Meeting was a longer description field for events. The length has been increased from 512 characters to 2048.

#### **Notes**

Users asked for a way to handle Daily Reports. In response, SMMware has added "Notes Templates". When you create a new note, you can have some header labels already in place, showing employees exactly what information they are expected to include in the note. Each of the places where you can enter a Note has its own template (Jobs, Clients, Organizations, Contacts, and soon Estimates), and they can all be managed in the Settings Editor.

The screenshot shows a web-based note editor interface. At the top, there are two green buttons labeled "Save" and "Return". Below them is the text "Note for job Amen, Debbie - Downsize Only". The editor has a "Summary\*" field with a text input box and a "Date Created:" field showing "Mar 13 2020 11:24 AM". Below the summary is a "Notes\*" field with a character count "(209/6143 chars)". A rich text editor toolbar is visible, including menus for File, Edit, View, Insert, Format, and Tools, along with icons for undo, redo, bold, italic, link, bulleted list, numbered list, and code. The main content area contains a template for a "DAILY REPORT" which is enclosed in a red rectangular box. The template text is as follows:

DAILY REPORT

- 1) Work completed today:
- 2) Rooms Worked In:
- 3) Materials Used:
- 4) Client feedback:
- 5) Next Steps:

At the bottom of the editor, there is a small text input field containing the letter "P" and another set of "Save" and "Return" buttons.

Side note: Most employees will cooperate in filling out all the fields. But if you do have an employee who might be inclined to delete a field they don't feel like filling out, we suggest numbering the fields as a way of making such changes more obvious and discouraging claims of accidental alteration.

## **Login Bugfix**

SMMware has been fixed for a bug affecting logging in, such that if you mistyped your username or password, the same bad info was preserved and submitted again even though you might have corrected them.

Background: When you hit 'Save' on a page after your login session times out, SMMware will preserve all the information you had put in the page, allow you to log in, and then complete the 'Save' process. You don't have to retype all your info into the page. This capability is very useful, but when I added it I accidentally also preserved the (possibly incorrect) username and password if you were logging in. My apologies for any frustration you may have experienced from this bug, but be assured that it is now squashed.

## **Next Steps**

Work on Google Calendar Integration will begin next week.

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

Thanks.

- *Brian Jacobs*