SMMware Subscriber News

April 19, 2020,

Recent Revisions | MailChimp

We hope everyone is staying safe during the ongoing Covid crisis. Below are a number of recent revisions in SMMware.

File Manager Revisions

Auto Rename: Another great suggestion from a SMMware user. This feature in the File Manager solves the problem of long random strings used by phones and tablets for the image names. If you check the "Auto Rename" checkbox, SMMware will combine the 'tag' with a sequence number to provide a filename that you can easily refer to in conversation. Example: Kitchen_004.jpg

Also, the file manager now offers 'next' and 'previous' buttons in the popup view of a file. Lastly, when you close the popup for a given file, in the original page the browser scrolls to position the last picture viewed at the top of the browser window.

Client Status levels

When looking at the client listing filter, the names of the possible status levels for a client have been tweaked.

'Active Clients' is now 'Current Clients', but still returns a list of clients who have at least one open job with you.

'Inactive' is now 'Past Clients', however it still returns a list of clients who have at least one job but none that are 'Active' jobs.

A status of 'Sales Leads' has been added, and returns a list of clients who have at least one Estimate where the estimate has a status of 'In Progress' or 'Submitted'.

A status of 'Stray' has been added, and returns a list of clients who don't have any jobs at all and no estimates at all. While SMMware won't force you to create a job or estimate, this is a situation that shouldn't exist for any length of time. This status level lets you track down your 'strays'.

A status of 'Potential' has been added. This returns a list of all clients except those marked as deceased.

The status of 'Deceased' already existed and is unchanged.

How SMMware Can Help You With MailChimp

When SMMware adds a new 'audience member' at MailChimp, it attaches tags. You can use these tags when sending email campaigns to address it to subsets of the overall list.

For a Contact, each category that the Contact is assigned to in SMMware becomes a tag for that audience member at MailChimp. You can use this to select only contacts at Senior Living Centers, or only at moving companies, etc.

Also, if the Contact profile has 'Refers Business to us' checked, the audience member at MailChimp will have a 'Refers Business' tag. If in MailChimp you filter for "Refers Business", the results can come from multiple SMMware categories.

Example: In SMMware a Realtor and a Marketing Director at a Senior Living Center both recommend business to you. In MailChimp, the Realtor will have 'Realtor' and 'Refers Business' tags. The Director will have 'Senior Living Center' and 'Refers Business' tags. If you filter for 'Refers Business', both of these Contacts will be on the list.

For a Client, they can be tagged as 'Current Client', 'Past Client', 'Sales Lead', and 'Deceased Client' *. As you add an active job or close a job, the status is updated as appropriate. The same is true when adding estimates.

For an Associate, they will be tagged as 'Active Associate' or 'Inactive Associate' as appropriate.

Lastly, while SMMware is able to send Clients, Contacts, and Associates to three separate Audiences at MailChimp, it is also possible to point all three at the same MailChimp Audience. So you are able to take advantage of the free account offered by MailChimp that comes with one Audience and still use all three types, you'll just use tags to target a given email campaign.

Note, you don't have to use all three lists (Clients, Contacts, Associates), any of them can be disabled as desired.

* While you aren't likely to select for the 'Deceased Client' tag to send an email campaign to, we consider it appropriate to keep them in the list just as 'unsubscribed' users are. We just want to make their status clear.

Marketing to A Client's Family

If a client has a family member as a Client Representative, you have an established relationship and level of trust with that family member, and they represent a potential future client. SMMware can help you to stay in touch with this valuable group.

That family member is in SMMware as a "Contact", in the category "Client Family". If your SMMware is integrated with MailChimp, those Contacts are in Mailchimp with the tag 'Client Family', allowing you to select them specifically for an email campaign.

The Notes Sections: Default Text

SMMware lets you configure default text for the Notes section in various parts of SMMware (Jobs, Clients, Organization, Contacts, Estimates). See Admin->Settings, the 6th group.

As one example of how this is used, you can treat your Notes sections as a daily report, with the default text being a list of information you want collected. But for any given Note, you can always delete that default text if it is not applicable.

Example default text for a Note in a Job profile:
"Meeting Date: | Meeting Progress: | Client Feedback: | Next Steps: "

Homepage: Delegated Tasks, Hiding Sections

There is now a section on the homepage named "My Tasks (Delegated)" which lists tasks created by you but assigned to others. Also, you can now hide sections of the homepage, using a 'hide' link in each section. The 'Show all sections' link at the top of the page brings back all the sections. The setting is device specific. For example, you can hide a section on a phone while still being able to see it on your desktop.

Next Steps

Currently a lot of people are taking advantage of our free one-on-one training as a way to be productive during the ongoing crisis, and if you are not among them you are welcome to join.

When it comes to new features, we have worked in a number of small improvements amidst the training, but our main focus for a new main feature is Google Calendar Integration.

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

Thanks, and stay safe.

- Brian Jacobs