SMMware Subscriber News

July 6, 2020,

Recent Revisions

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

User Permissions

We have over time received feedback that more granularity over permissions would be highly desirable. For instance, you may feel that it is not necessary that Normal Level users have access to your list of Organizations & Contacts.

SMMware now has 8 new permissions fields in the Associate Profiles.
* Manage Jobs & Clients (Options: None | Read | Read/Write)
* Manage Organizations & Contacts (Options: None | Read | Read/Write)
* Manage Flat fees (Options: None | Read | Read/Write)
* Manage Invoices (Options: None | Read | Read/Write)
* Invoice Approval (Yes | No)
* Manage File Shares (Options: None | Read | Read/Write)
* Manage Inventory (Options: None | Read/Write)
* Manage Consignment (Options: None | Read/Write)

The Help page for Associates has been updated to include the information about these permissions.

As part of the launch process, each user was given permissions equivalent to what they had before. The exceptions are Consignment and Inventory, so if they are applicable you would need to add those.

The other previously existing permissions (The 4 'Role' permissions, plus QuickBooks & Google related) are unchanged.

Estimates: Level of Detail in PDF

Some users have sent feedback that it would be preferable if the PDF produced by SMMware did not include rates and subtotals on a line item by line item basis, leaving that to just the group or overall summaries. Towards this end, there is now a setting in the Settings Editor (see the last item in the 2nd group) "Estimate PDF, Display Mode", which can have values of either "Full" or "Minimal".

Sales being a different situation than invoicing, the thinking is that it is unlikely that this format decision would be different from one estimate to the next. More importantly, in the case of Sales work, there is the risk of losing work if the Full version was accidentally sent, so rather than having two PDF buttons (one for 'Full', one for 'Minimal') in the Estimate, this is a system setting.

Next Steps

Many people are continuing to take advantage of our free one-on-one training, and if you are not among them you are still welcome to join.

Development will continue focusing on a variety of relatively smaller user requested enhancements. Our prime focus now is allowing for multiple adjustments/deposits for invoices.

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