



## SMMware Subscriber News

October 15, 2020,

### Latest Revisions

We hope everyone is staying safe during the ongoing Covid crisis.

Below are the latest revisions in SMMware. We continue our recent focus on giving you more control over your SMMware site. But be assured that if you are not comfortable setting any aspect of SMMware you are still welcome to contact us for support. Soon we will move back to subscriber suggestions. Many of the changes to SMMware come from user requests, and we are always grateful for feedback. Your input makes SMMware better for everyone.

### Topics In This Newsletter

- Content Importer
- Theme Editor
- Duplicate Records
- Default Status for Filters

#### Content Importer

You now have the ability to do mass uploads of new Client records, new Organization and Contact records, and Associate records, using 'Comma Separated Variable' (CSV) format files. This file format is a standard when exporting from a variety of other programs, just as it is the standard format when exporting from SMMware.

Be sure to read the Help page for the Import Content page.

#### Theme Editor

You now have the ability to upload a header image for the main SMMware pages, but also the header image used in your Estimates & Invoices. Additionally, you can set the

3 colors used in a SMMware site (Main nav, section colors, and the rollover for the main nav). As current subscribers your sites already have a look and feel customized for you, but this allows you to tweak them if you like.

## **Duplicate Record Prevention**

It has been a common request that SMMware should prevent duplicate records, referring to Clients, Associates, and to Organizations & Contacts. Now, if you create a Contact record for “Jane Doe” and there is already a Contact with that name, SMMware will not allow you to save that record, giving you a red popup. The popup does have a convenient link to the existing record.

SMMware is looking at the first name and last name combination as the criteria. You can also verify that a record already exists for a given name by doing a search as well.

SMMware will allow you to have entries with the same name if they are in different sections. So you can have a Client named “Jane Doe” and a Contact named “Jane Doe” for example.

Lastly, what do you do if you need to revise a record but there is a second duplicate entry from before SMMware prevented duplicates? In that situation, SMMware won't let you save changes to either record. One option is to delete one of the records, but what if SMMware won't let you delete either record because they were in use? In this, we'll follow the lead of QuickBooks. It also disallows duplicates, and when the occasional duplicate record is unavoidable, they recommend adding a period at the end of the last name. To human eyes, the names look pretty much the same, while the computer still sees them as different.

## **Default Status for Filters (Clients / Estimates / Jobs Listings)**

Historically, when you visit the Client Listing page, SMMware wants to help you focus on the present by default. The thinking is that showing you clients from 3 years ago just clutters things up, so SMMware just shows you your current, active clients. Most people like this approach.

However, some people do find it confusing that you can create a client record that (unless you also create an Active job) won't show in the default listing, of current clients.

SMMware now lets you set the Client Listing so that it defaults to “All” clients instead (or any other status option), if you are more comfortable with that. You'll find this setting in the Settings Editor in section 5 (Clients / Estimates / Jobs).

There are similar new settings in the same place for the Estimate Listing and Job Listing.

## **SMMware User Forum**

You can follow @SMMware on Twitter to be kept up to date.

## **Manuals, YouTubes, and Help Pages**

Just a reminder, the latest versions of our manuals are always available from the [SMMware website](#). And you can view any of our ~30 instructional YouTube videos [here](#). Lastly, another source of answers is the help pages within SMMware, found by clicking the “Help” button at the right end of the main menu. None of this is intended to discourage you from contacting SMMware support, we’re just trying to make sure everyone is aware of the options for getting answers to questions.

## **Next Steps**

We will soon be giving you the ability to manage your own configurations for QuickBooks Online and QuickBooks Desktop. After that, development will focus on a variety of relatively smaller user requested enhancements.

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

## **Newsletter Archive**

Were things crazy busy the last time a SMMware Subscriber newsletter arrived in your inbox, did the newsletter get lost in the stream of incoming emails? Today, finding yourself with a few moments of free time, are you wondering what great new features were announced that you could be using right now? No problem.

Visit our archive of previous newsletters here: <https://www.smmware.com/newsletters/>

You can also find it by visiting <https://www.smmware.com> and navigating to Company -> Newsletters.

Thanks, and stay safe.

- *Brian Jacobs*