SMMware Subscriber News

October 14, 2022

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- Important! SMMware User Meeting Location – Update
- Recommend SMMware, get 3 Months Free!
- Zapier Integration
- Minor Revision: Creating Client Records When Starting Jobs
- Minor Revision: Associate Middle Names
- Server Maintenance, Sat Oct 15, 7pm EST
- In Person Appointments during the NASMM Conference

Important! SMMware User Meeting Location

Our location has changed to The Jefferson Room instead of the SMMware booth in the exhibition hall.

The day and time are still Thursday, 3:30 – 4:30PM. Also, you will see the meeting listed in the official NASMM Conference app. Our thanks to NASMM for their support in providing us with a meeting room.

Recommend SMMware, Get 3 Months Free!

For current subscribers, if you recommend SMMware to someone who goes on to become a subscriber, you will receive three months free!

Details:

- This program starts on Thursday, October 20th, and will expire on December 31, 2022 (based on start date of new subscription)
- Once the new subscriber has maintained their subscription through 1 payment, your account will be credited for the 3 months reward.
- A company can receive the 3 free months for as many new subscribers as name them.
- A new subscriber can only name one current subscriber as having recommended them.

Zapier Integration

We have now released our first level of integration with Zapier. You can watch our video about it here: https://youtu.be/0ydeM-UrOIs

Here is why you might care, examples of how you might use it:

- Have new clients entered into SMMware added to Constant Contact (or any other 3rd party software that would want to know about new SMMware clients).
- Have new events entered into SMMware added to Microsoft Outlook Calendar (or other online calendar).

More Details

When you enter a new client, organization, contact, or associate in SMMware, you can arrange to have other 3rd party software told about it.

You can arrange for other 3rd party software to tell SMMware to add a new client, organization, or contact.

Over time and based on user feedback, we will continue to add more specific ways for SMMware and other 3rd party software to communicate (via Zapier).

Minor revision: Creating Client Records When Starting Jobs

By the start of the conference, we'll have launched a revision that lets you create a new client record 'on the fly' when you start a new job, similar to how we handle creating client records from within a new sales lead. We hope that you will find this streamlining helpful.

Minor revision: Associate Middle Names

You can now enter a middle name for an associate. This was added for the sake of the calendar, so that the list of attendee initials could distinguish between associates with the same first and last initials.

Server Maintenance, Sat Oct 15, 7pm EST

We will be doing some minor server maintenance on Saturday, October 15th, at 7pm EST. We are allowing up to an hour, but hope to limit downtime to 15 minutes.

Appointments, NASMM Conference in Philadelphia

Other than when the Exhibit Hall is open, I will be available for appointments throughout the day. You can make an appointment via Calendly using this link:

https://calendly.com/SMMware/60min

For those you attending the conference, I hope to see there.

In Progress

Currently, our main focus is on eSigning, with a focus on Docusign.

And lastly, we continue to work on feature requests from you, our subscribers.

Thanks.

- Brian Jacobs