SMMware Subscriber News

November 21, 2022

Topics below:

- Marking Up Expenses
- Minor revision: Event Default End Time
- Zapier Integration
- Recommend SMMware, get 3 Months Free!

Marking Up Expense

If you do not integrate SMMware with QuickBooks at all, or if you integrate SMMware with QuickBooks Online, SMMware now allows you to mark up your expenses. SMMware previously assumed that you wanted to be reimbursed by the client at cost for expenses. Note, unfortunately if you use QuickBooks Desktop, their interface does not appear to support this ability. We will continue to look for a way to include QuickBooks Desktop in this feature.

You set a default percentage to mark up an expense, from Admin->Settings Editor, Section 2, Hours/Expenses/Fees/Suppies. See the entry labelled 'For expenses, default percentage markup'. When an expense is created, the marked up amount will be calculated automatically based on this percentage.

A user with Admin privileges editing an expense will now see a field labelled 'Marked Up' where they can override the amount to be charged to the client.

For all SMMware sites, the 'For expenses, default percentage markup' setting is set to 0 (zero markup, expense passed through), and all previously existing expense entries have a marked up value equal to the purchase value.

The 'marked up' amount is automatically calculated and saved at the time the expense is created. It is also recalculated when a non-Admin user changes the purchase amount for an existing expense. Changes to the default markup percentage in the Settings Editor do not affect existing entries.

The various other sections in SMMware such as Invoices, the Invoice Summary Report, and the Profitability Report now reflect the marked up price.

Within QuickBooks Online, you may need to activate the ability to mark up expenses.

To do so:

1. Click on the gear icon
2. Click on Accounts and Settings in the popup
3. Click on Expenses in the left column
4. Click on the 'pencil' edit icon.
5. Check mark the 'Markup with a default rate of ___ %' and enter a percentage

Minor Revision: Event Default End Time

Per the SMMware User Meeting during the NASMM Conference, the default end time for a new event has been changed from the latest time of the day (typically 8pm) to 3pm.

Additional changes from the User Meeting will continue to be implemented over time.

Zapier Integration

Reminder, just before the NASMM conference, we 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).

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 started 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.

In Progress

Currently, our main focus continues to be eSigning, with a focus on Docusign.

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

Thanks.

- *Brian Jacobs*