



SMMware Subscriber News

November 7, 2022

Topics below:

- Marking Up Expenses
- Zapier Integration
- SMMware User Meeting Location – Summary
- Reminder: Recommend SMMware, get 3 Months Free!
- Upcoming Webinar, Thurs, November 10th, 1pm EST

Marking Up Expense

SMMware will soon allow you to mark up your expenses. SMMware previously assumed that you wanted to be reimbursed by the client at cost for expenses. We anticipate releasing it as of Monday, November 14th, but there will be an official announcement.

You will set a default percentage to mark up an expense, from Admin->Settings Editor, Section 2, Hours/Expenses/Fees/Suppie, using 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 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 will be set to 0 (zero markup, expense passed through), and all previously existing expense entries will have a marked up value equal to the purchase value.

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

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

Zapier Integration

We recently 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).

SMMware User Meeting, NASMM Conference

Our thanks for the 20 or so people who attended the User Meeting in Philadelphia, at the NASMM conference. We spoke for a bit over an hour, and I very much appreciate the feedback received.

Here are some of the topics covered

- The possibility of a clock-in/clock-out feature
- Marking up expenses
- Scheduling: Sending reminder to people who were invited to an event but haven't yet responded either way.
- Recurring Unavailability/Availability entries
- Tasks: Some revisions to make them more useful. The details are still under consideration. Among the topics were the possibility of assigning tasks to a role (like Team Lead) instead of a specific person. The possibility of workflow, where closing a task automatically creates another.
- The possibility of setting custom rates of job codes on a per job basis.
- ...and a fair number more

It will take some time yet to fully absorb the conversations we had, and making decisions, setting priorities and code changes will of course also take time. But hopefully people will look back at our track record of improving SMMware and remain confident that we will continue to do so.

Upcoming SMMware Webinar

Some subscribers have asked to be informed of our next webinar, and we have one coming up this Thursday, Nov 10th, at 1pm EST. The main announcement went out via NASMM, but this is for anyone not on NASMM's email list.

[Click here to register](#)

Reminder: 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 is on eSigning, with a focus on DocuSign but also looking at HelloSign and SigNow.

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

Thanks.

- *Brian Jacobs*