SMMware Subscriber News

December 8, 2022

This email was suggested by Liz Donovan, our trainer extraordinaire. Now is the time of year when many people will want to send cards to this year's clients and SMMware makes it easy.

You can export your client list as a CSV (Comma Separated Variable) file for use with the label printing software of your choice. You can find many discussions about label printing on the Internet, but here is an example: https://fixthephoto.com/best-label-printing-software.html

Start by navigating to the Client Manager. In the filter section, set the status dropdown to 'All'. There is a radio button labeled 'Against...', and you should choose 'Job', which tells SMMware to look for clients with at least one job with a 'Job Begin Date' within the date range. You might want to use a start date like December 1, 2021, so as to catch a job that actually began at the end of 2021 but which you want to include since it ended in 2022. You can leave the end date blank, so as to run through today. Once you've entered your settings, be sure to click 'Filter'.

Lastly, just click the 'Export' button in the filter section to get your CSV file.

Happy Holidays everyone, we hope you enjoy the season.

Thanks.

- Brian Jacobs