SMMware Subscriber News

January 8, 2023

We have add new features intended to help your Sales efforts, including some new fields in the Sales Lead Profile, and the automatic creation of Tasks and Notes.

Sales Lead Listing

We have revised our Sales Lead listing (you may have configured the Settings Editor to call Sales Leads by a different name) adding automatic creation of Tasks and Notes and to let you record more of the information you use to drive your process.

We list the date of last activity on the lead, as well as the date for a 'next action' (based on the due date of the latest task for this Sales Lead).

We also include the colored status tags (The ones that, while configurable, defaulted to 'Hot Lead' | 'Medium Lead' | 'Cold Lead'), as well as the statusboard notes (the same as appear on the homepage Sales Status Board).

We have de-emphasized who the lead salesperson is in the listing, The job type for this sales opportunity has also been moved down into this lower row.

The date that the sales lead was created is still provided, but SMMware now emphasizes the ages of the Sales Lead (how many days old it is).

We have added a score to Sales Leads which is weighted by various factors indicating the level of client interest and value. It will come into play mainly when you are busy and have to choose which leads to pay attention to. When things do get busy, for a given day the listing will be in order of score, helping the Sales Person to first focus on the most promising leads.

Sales Lead Profile

We have added these fields to the Sales Lead profile

- **Customer Decision Date**: While talking to potential clients, many sales people will ask where the customer is in their process, and when they imagine they might be making a decision. The date you enter here should be a 'best fit' for that date (such as when they say they will decide in 'about a month').

- **Date Last Submitted**: When a sales lead is saved and the status has been changed to one that has the 'Submitted' attribute, the current date will be inserted here.
- **Date Last Won**: When a sales lead is saved and the status has been changed to one that has the 'Won' attribute, the current date will be inserted here.
- **Age**: The number of days since the sales lead was created. Also still provides the creation date, found by hovering over the '?' icon.

When the status of a sales lead is changed, the system will create a 'Note' to that effect, to better preserve the history of the sales lead (with the person saving the lead shown as the Note creator).

When a quote is emailed to the potential client, the status of the sales lead is changed to an option that has the 'Submitted' attribute, and a system generated Note is also created (showing the name of the quote file, and the recipient email address).

You can now customize the subject and text of the email (before it was hard coded). That content is part of the Note.

When a Sales Lead is created, if a Lead Salesperson is set, a Task will be created assigned to the Lead Salesperson, with a due date 3 days in the future, with content saying to 'Please Review'. The creation of the Task does result in an email being sent to the Lead Sales Person as is typical. If the Lead Salesperson is changed, the Task will be reassigned and a new due date (again 3 days in the future) will be set.

In a Sales Lead profile, when the Customer Decision Date is set or changed, a Task will be created/updated with a matching due date, assigned to the Lead Salesperson (if there is one).

Similarly, if the Last Submitted Date is changed (directly or by a change in 'Sales Lead Status', a Task will be created/updated as well.

SMMware now remembers your sort preference for the sales lead listing (per device).

In the Settings Editor, you can set a default for the Lead Sales Person. To 'none', 'current user', or to a specific Associate.

There is now an 'Add Event' button in the Events section of a Sales Lead profile.

We have created an updated YouTube video on Sales Leads, which you can view here: https://youtu.be/G8RFH_28Z9A

We will be holding a webinar on Jan 17 at 1pm EST, specifically for current subscribers, to demonstrate these new features, to answer any questions, and to collect feedback. Click here to register.

System Generated Notes

Above, we mentioned several times when doing something in SMMware will now automatically generate a Task and/or Note. We envision adding more such instances, and are open to requests from you regarding where you would like to see this implemented.

Invoices

Similar to the above revision, when an Invoice is emailed to the client, a Note will be created under the related Job (Invoices don't accept Notes).

We welcome any feedback you may care to share on these changes, and hope that it will make the Sales Leads more useful for you.

Thanks.

- Brian Jacobs