



SMMware Subscriber News

January 16, 2023

Last Chance - Demo of Sales Lead Revisions:

We will be holding a webinar tomorrow, 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.](#)

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

Invoices

When you email an invoice as a PDF attachment, you can now customize the subject and text of the email (before this it was hard coded). That content is part of the associated Note.

Jobs

When you assign/change the Team Lead for a Job, the system creates a Task assigned to that person with a due date 3 days out asking them to review the Job. The creation of the Task does result in an email being sent to the Team Lead as is typical. If the Team Lead is changed, the Task will be reassigned and a new due date (again 3 days in the future) will be set.

When the status of a job is changed, a Note will be created to that effect.

Summary Notes from Sales Lead

There is now a Settings Editor option so that you can choose whether or not to copy the Summary Notes of a Sales Lead to a Job. If you put background info there that you want your Team Leads and Team Members to know, you may want the summary to copy over. If your comments include dollar amounts, you want prefer not to.

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.

We welcome any feedback you may care to share on these changes, and hope that they will make SMMware even more useful for you.

Thanks.

- *Brian Jacobs*