SMMware Subscriber News

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Layout Changes for Some Pages

The client, job, and sales lead pages have some layout changes to improve readability. Also, we have had some feedback regarding the Client Page that not everyone notices the buttons that activate the dropdowns for the Referred By fields, so those fields now use a 'Type Ahead' approach.

Homepage Edit Buttons

When you use an 'Edit' button in one of the various sections of the homepage, the 'Return' button in the next screen now takes you back to the homepage, where before many of them took you to the listing page for the relevant function.

Settings for Automatically Created Tasks

The Settings Editor, Section 5, now has settings allowing you to activate/deactivate the automatic creation of Tasks. You can also configure the default time interval for the due date for those Tasks (2 days from the date the Task was created, or 2 weeks, etc.).

Availability Table

SMMware is open to subscriber feedback about improvements, and the one below is another way of helping determine which day would work best for an event.

In the Event editor, if attendee management is set to 'Availability', there is now an 'Availability Table' button that opens a popup. In the popup is a table with associates in the left column and days across the top row. The cells contain a list of an associate's available time.

Note, for your convenience, clicking on a name pushes that name to the top of the list, and allows you to gather all of the 'candidates' together for review prior to picking a day. Also, clicking on a date (top row) takes you back to the Event Editor has presets the chosen date as the event date. The tooltip next to the page title also reminds you of these functions.

Our thanks to Moyer Moving Group for having suggested and partially sponsored this feature.

Revision to Shifts for 'Availability' Events

A revision to save a few clicks when creating 'Availability' events.

When you are using 'Availability' to manage attendees and assign a shift, SMMware will now remember the start and end time you used and use it for the next shift you create for that event.

Best practice: if your event will have 4 associates, 3 with the same shifts and 1 with a different shift, create the shift for the 'odd' person last. They way when you create the shifts for the 2nd and 3rd person you can save yourself the trouble of adjusting the start and end time.

Our thanks to Moyer Moving Group for having suggested and sponsored this feature.

Team Notifications

This revision emails team members of a job when a Note or Task has been created or changed.

You can assign a team to a job using the 'Assign Associates' multi-select field found in a Job Profile, to the right of the 'Job Summary' text field.

If you are not seeing the 'Assign Associates' field, you can activate it from Admin->Settings->Section 5 (Clients/Sales Leads/Jobs), by setting 'Job Profile allows assigning Associates?' to 'Yes' (5th item from the top).

Default Text for Event Descriptions

You can configure some default text that will appear in the Description field when you create a new event. See Admin->Settings, Section 4) Calendar.

'Tips & Tricks': Setting start and end times for Availability Events that have zero attendees

SMMware did not originally envision Availability based events with zero attendees, which meant that if you wanted to create one you weren't able to control the start and end time. You could add a shift and set the times but if you removed the shift the start and end time reverted to default.

However, we have gotten feedback that people do want to create events with zero attendees early in a project as a placeholder, as a temporary situation with actual attendees assigned later. Admittedly we are still resistant to allowing the direct setting of start and end times for Availability events in order to avoid situations such as where an attendee is set to start at 8am yet the event is set to start at say 10am.

But now if you remove the last attendee from an event, the start and end times do not revert to default, they reflect the last shift prior to its deletion. So for events with no attendees you can create a shift, set the start and end times, then remove the shift before saving the event (with no attendees).

Minor changes

Most of these are the results of subscriber requests.

- **Renamed Statusboards**: 'Statusboard – Ops' has been changed to 'Statusboard – Jobs'. 'Statusboard – Sales' has been changed to reflect your name for a sales opportunity (the 'main menu' term). Typical examples are 'Statusboard – Prospects' or 'Statusboard – Inquiries'.
- **Print Versions**: There are now printable versions for sales lead and job profiles
- **Organization Screen**: The Editing screen for an Organization has been re-arranged a little to remove some of the white space.
- **Payroll Report:** When exported to CSV, the payroll report now includes columns for start time, end time and break hours.
- **Job and Sales Lead Summary Field:** The allowable character length of these fields has been tripled (increased from 2,048 to 6,144)
- **Contact Titles:** In an organization editing screen, the contact listing now includes their titles.
- **Quote PDF Formatting:** Some blocks were losing the line breaks or tabs when the quote was turned into a PDF; those should now be preserved.
- **Assigning Associates to Jobs:** This was previously handled using a 'multiselect' field listing associates, but now associates are added as tags.
- **Assigning Categories to Organizations and Contacts:** This was previously handled using a 'multiselect' field listing the categories, but now categories are added as tags.

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