



Address History Explained

Version 2

SMMware maintains a history of addresses where your client has lived, which can be thought of like a layer cake. When you first meet a client, that address will be permanently stored in their client profile as the first/bottom 'layer' and is their 'Original Address'. That label 'Original Address' always refers to the address in their client profile.

Each job you do for the client adds a layer to top of the cake. If the job does not involve moving (Just a floorplan), leave the address blank for that job and then that job won't affect the address history.

Your ongoing job (Job 183, below) will hold the address they are moving to. The last job that involved moving can be assumed to be the current address.

When your ongoing job has its status changed to 'Closed', the system will now label Address 4 as the 'current' address (There will then not be any 'Move-to' address).

Notice that the address referred to as 'current' changes over time.

The label in the address history for Intermediate jobs (like Job 114 below) is just the job number: "Job 114".

In the Client listing and search results, the address used is the 'current' one.



A Step By Step Example

When you first meet someone, you create a Client Profile and enter their 'Original' address. At this point, this address is also their 'Current' address.



Next, you move them to Address 2 as part of Job 114 (Address 2 is entered in Job 114). That job is over, so now Address 2 is their 'Current' address.



Next, you do a job for them that does not involve moving (Job 123, which is complete). Note that Address 2 is still their 'Current' address.



Next, you move them to Address 3 as part of Job 164. That job is over, so now Address 3 is their 'Current' address.



Lastly, you are now about to move them to Address 4 as part of Job 183. That job isn't over yet, so for now Address 3 is still their 'Current' address. Once Job 183 is done, then Address 4 becomes their current address.

