



User Manual for Basic Users, SMMware

Version 1.1.16

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Introduction


This document is an introduction to SMMware for Basic Users. SMMware is a web based software solution, accessed via a web browser. You can use a desktop computer, tablets such as the iPad, and mobile phones. As a Basic User, your typical tasks are to enter hours, expenses, or mileage for a job. You may also use SMMware for its scheduling calendar to indicate that you wish to participate in a task (Packing a client's home, for example). You can also use it as a reference to look up contact information for a client, co-worker, or vendor.

Creating events, managing associates, clients, jobs, and vendors are typically considered tasks for advanced users. Team Leaders are typically considered advanced users, and will also want to consult the Team Leader User Manual.

Each SMMware client has their own URL of the form <http://company-name.smmware.com>. As a user, the URL will be provided to you. Your instance of SMMware will look slightly different than the screenshots contained in this manual. Your company logo will appear in the header, and the color scheme will be customized.

Most commands do save directly from the editing screen. But some commands you'll use do follow a two step process. In those cases, first there is a data entry screen with the fields you can fill out. Second, when you click 'Next', or 'Delete' to go to the Completion screen, the data is saved to or deleted from the database. If you leave the page prior to the Completion step, your changes/deletions will not be recorded in the database and will need to be re-done. Note that SMMware does not currently follow an 'auto-save' model.

Throughout the manual, note sections like this below, providing links to relevant YouTube videos:

	Watch our YouTube video about creating a shortcut on the desktop for your Apple device at https://youtu.be/36S4WjDZKvQ (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)
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Requirements

Access to the Internet.

A web browser.

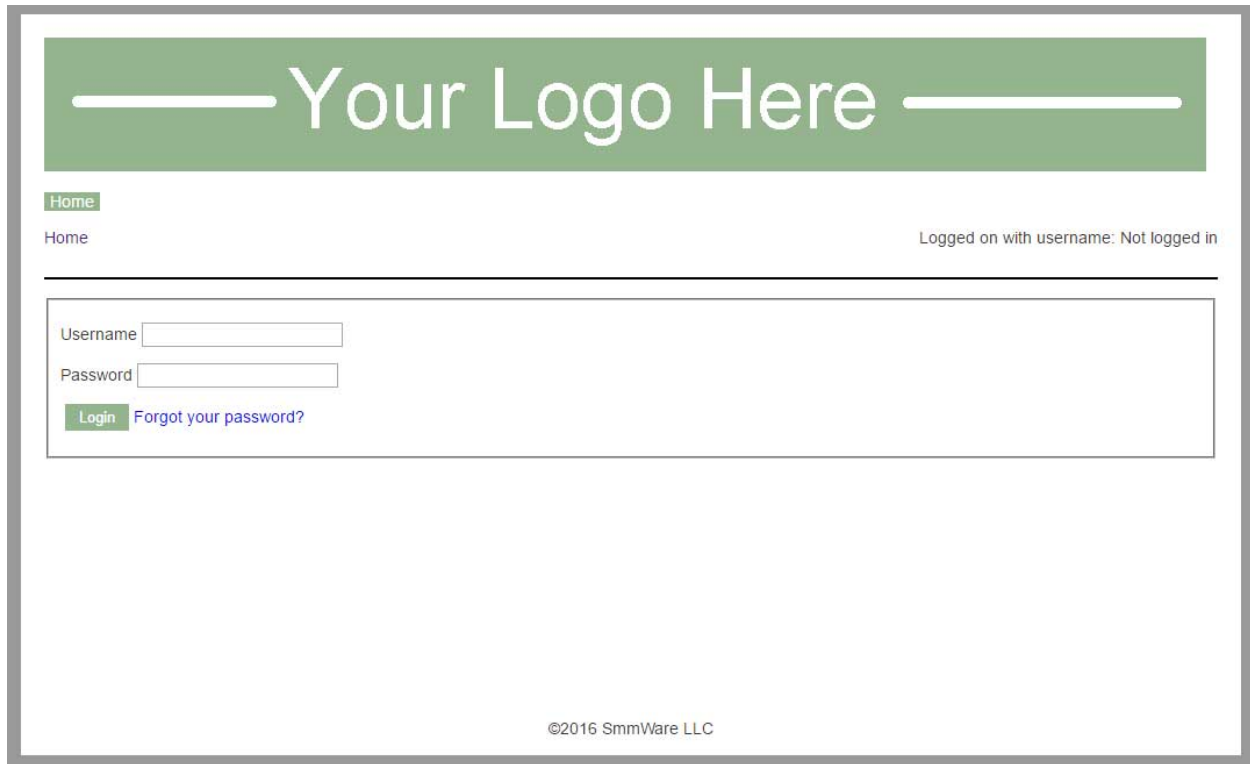
Cookies must be allowed (to maintain your login state).

Popup windows must be allowed (for help screens).

Mobile devices to have a minimum width of 750px in portrait mode.

Logging in

The login form will appear when you first browse to the main URL of your website.



The screenshot shows a web page layout. At the top is a green horizontal bar with the text "Your Logo Here" in white, flanked by two white horizontal lines. Below this bar, on the left, is a green button labeled "Home". Below the "Home" button is the text "Home". On the right side of the page, the text "Logged on with username: Not logged in" is displayed. A horizontal line separates the header from the main content area. In the center of this area is a white rectangular box containing a login form. The form has two input fields: "Username" and "Password". Below the "Password" field is a green button labeled "Login" and a blue link labeled "Forgot your password?". At the bottom center of the page, the text "©2016 SmmWare LLC" is visible.

You will be provided with your login information. If you want to change your password, you may do so through the "Forgot your password?" function found on the login screen.

If you have forgotten your password, you can use the Forgotten Password link on this form. It will guide you through the process of resetting your password. You will need access to the email address on record for you within SMMware.

— Your Logo Here —

[Home](#) Logged on with username: Not logged in

Username

Password

[Forgot your password?](#)

©2016 SmmWare LLC

— Your Logo Here —

[Home](#) Logged on with username: Not logged in

If you have forgotten your password, enter your username below and a 'password recovery' email will be sent to you.
Click here to return to the log in screen

* Username:

©2016 SmmWare LLC


Your forgotten password email will read:


“This email is valid for 2 hours from the time it was generated. To reset your password, [click on this link](#) to open a page in your web browser.”

Clicking on the link will open a webpage where you can enter your new password.

Mobile Devices, Creating a Desktop Shortcut

Since SMMware is a website, we suggest that you create a ‘shortcut’ on the desktop of your mobile device. When you have one, clicking on it both opens a web browser and take you to the site, which is quite convenient.

	Watch our YouTube video about creating a shortcut on the desktop for your Apple device at https://youtu.be/36S4WjDZKvQ (if this link is broken because we’ve posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)
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	Watch our YouTube video about creating a shortcut on the desktop for your Android device at https://youtu.be/4xghFTDDT_k (if this link is broken because we’ve posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)
---	---

Help

The Help button is at the far right of the main menu bar and appears on every page.



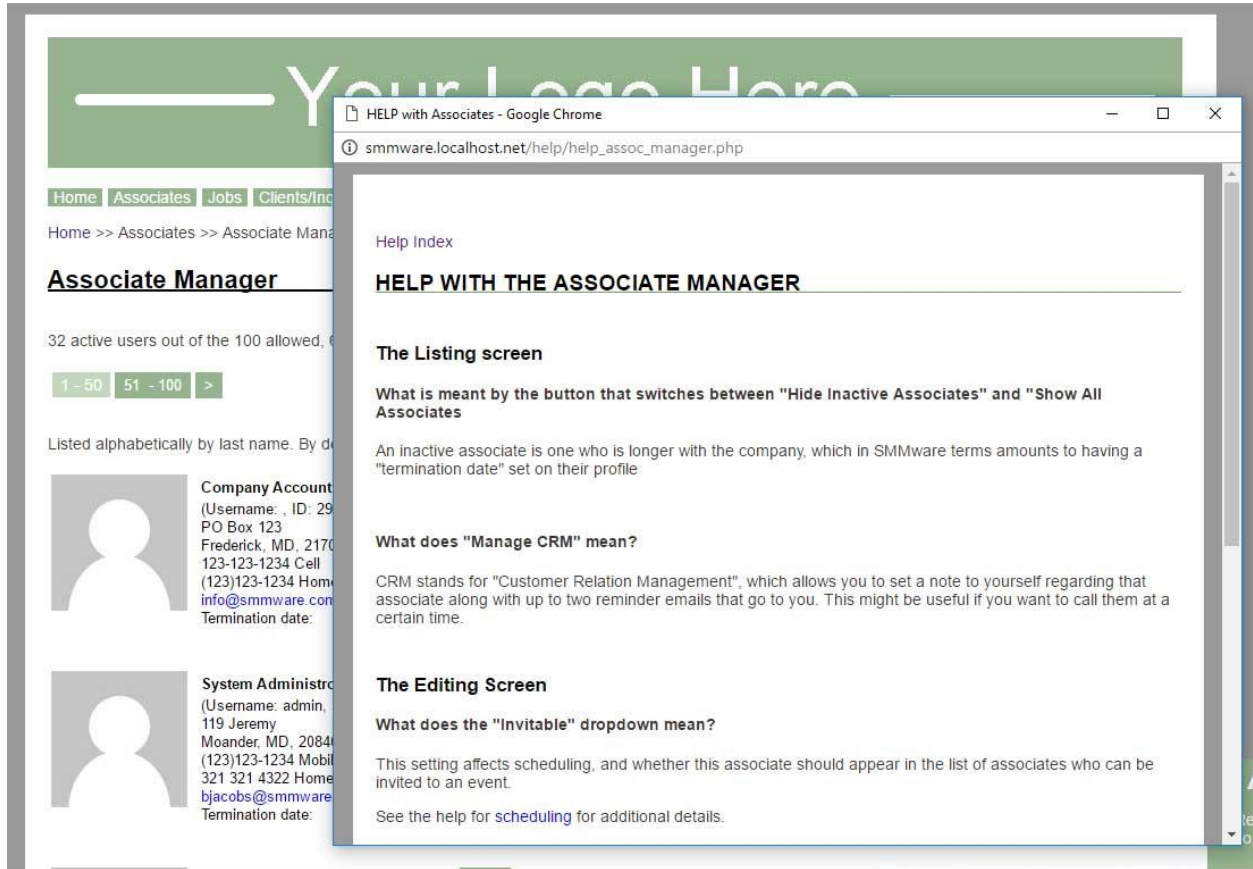
Home | Admin | Associates | Jobs | Clients/Inquiries | Organizations/Contacts | Customer Relations | Consignment | Inventory | **Help**

Home >> Clients/Inquiries >> Manage Clients

Logged on with username: admin [Log Out](#)

Manage Clients

The Help for SMMware is Context Sensitive, which means that the popup window that appears when you click it will contain information related to the page you were on when you clicked Help. However, you can always navigate to the help system's Table of Contents and from there to whichever help page is desired.



Associates

Basic Users can see a list of associates and a limited set of details for those associates. If updates are needed for your own profile other than your password, please contact your company's administrator of SMMware. Note that your system may be configured to use portrait images or not to.

Associate Manager

44 records found.

(Note: 44 active users out of the 100 allowed) [Show All Associates](#)

Listed alphabetically by last name. By default only active employees appear in this list.

System Administrator

[View](#)

Title: *System Administrator*

(Username: admin, ID: 1)

(240) 285-4619 Mobile

321 321 4322 Home

bjacobs@smmware.com

Termination date: Active

Johannes Bach

[View](#)

Title: *Admin*

(Username: abach, ID: 36)

123-123-1234 Mobile

202-300-4582 Home

bjacobs@rednoodle.com

Termination date: Active

What a Basic User can see for other associates:

Associate Manager


[Return to Listing](#)

First Name*: Johannes	Last Name*: Bach	Title: Admin	Type: Supervisor	
Job Code Level: Senior	Start Date*: ***	Hire Date*: ***	Termination Date: ***	
Color: Light red	Hourly Rate Effective Date*: ***	Hourly Rate*: \$***	Invitable: Yes	
Phone 1: 123-123-1234	Description 1: Mobile	Phone 2: 202-300-4582	Description 2: Home	Email: bjacobs@rednoodle.com
Address 1: ***	Address 2: ***	City: ***	State: ***	Zip: Country: *** **
Username: ***	Password: ***	Confirm Password: ***	Contact via: Email	Admin level: ***

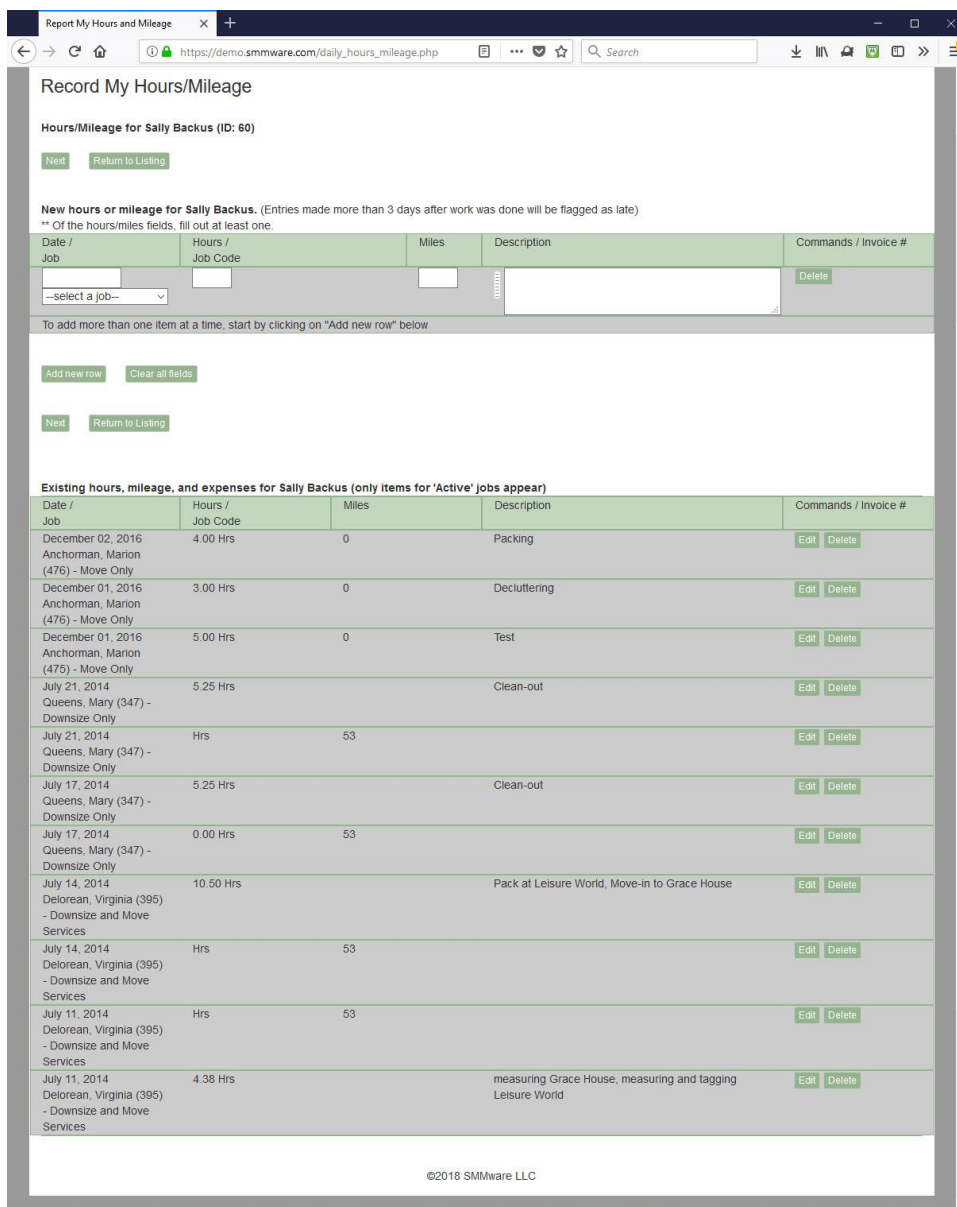
[Return to Listing](#)

Record My Hours/Mileage

This command allows you to enter/edit hours and mileage against ongoing jobs. To review your entries for jobs which are no longer active, see the “My Hours/Expense/Mileage History” command (the next section).

	<p>Watch our YouTube video about Recording Hours, Mileage and Expenses at https://youtu.be/_aoh2sa1k3Q (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)</p>
---	---

Below is how the screen will typically appear.



Date / Job	Hours / Job Code	Miles	Description	Commands / Invoice #
December 02, 2016 Anchorman, Marion (476) - Move Only	4.00 Hrs	0	Packing	Edit Delete
December 01, 2016 Anchorman, Marion (476) - Move Only	3.00 Hrs	0	Decluttering	Edit Delete
December 01, 2016 Anchorman, Marion (475) - Move Only	5.00 Hrs	0	Test	Edit Delete
July 21, 2014 Queens, Mary (347) - Downsize Only	5.25 Hrs		Clean-out	Edit Delete
July 21, 2014 Queens, Mary (347) - Downsize Only	Hrs	53		Edit Delete
July 17, 2014 Queens, Mary (347) - Downsize Only	5.25 Hrs		Clean-out	Edit Delete
July 17, 2014 Queens, Mary (347) - Downsize Only	0.00 Hrs	53		Edit Delete
July 14, 2014 Delorean, Virginia (395) - Downsize and Move Services	10.50 Hrs		Pack at Leisure World, Move-in to Grace House	Edit Delete
July 14, 2014 Delorean, Virginia (395) - Downsize and Move Services	Hrs	53		Edit Delete
July 11, 2014 Delorean, Virginia (395) - Downsize and Move Services	Hrs	53		Edit Delete
July 11, 2014 Delorean, Virginia (395) - Downsize and Move Services	4.38 Hrs		measuring Grace House, measuring and tagging Leisure World	Edit Delete

At the top of the screen, you will see a blank row of fields for making a new entry. Use the “Add New Row” button to make multiple entries together.

New hours or mileage for Sally Backus. (Entries made more than 3 days after work was done will be flagged as late)
 ** Of the hours/miles fields, fill out at least one.

Date / Job	Hours / Job Code	Miles	Description	Commands / Invoice #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
--select a job--				

To add more than one item at a time, start by clicking on "Add new row" below

Below that you will see a table with any existing entries you have already made.

Existing hours, mileage, and expenses for Sally Backus (only items for 'Active' jobs appear)

Date / Job	Hours / Job Code	Miles	Description	Commands / Invoice #
December 02, 2016 Anchorman, Marion (476) - Move Only	4.00 Hrs	0	Packing	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
December 01, 2016 Anchorman, Marion (476) - Move Only	3.00 Hrs	0	Decluttering	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
December 01, 2016 Anchorman, Marion (475) - Move Only	5.00 Hrs	0	Test	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
July 21, 2014	5.25 Hrs		Clean-out	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

New Entries

For a new entry, first select a date and a job.

New hours or mileage for Sally Backus. (Entries made more than 3 days after work was done will be flagged as late)
 ** Of the hours/miles fields, fill out at least one.

Date / Job	Hours / Job Code	Miles	Description	Commands / Invoice #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
--select a job--				

To add more than one item at a time, start by clicking on "Add new row" below

Next enter the hours. Your system can be configured for entering hours based on the total elapsed hours that day, as shown below.

New hours or mileage for Sally Backus. (Entries made more than 3 days after work was done will be flagged as late)
 ** Of the hours/miles fields, fill out at least one.

Date / Job	Hours / Job Code	Miles	Description	Commands / Invoice #
<input type="text"/> --select a job--	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

To add more than one item at a time, start by clicking on "Add new row" below

Or it may be configured to enter hours as start and end times, with the total hours calculated for you. In conjunction with start and end times, your system may or may not be configured to include a "Break hours" field. If it does, the break hours is the total for the day. If you took a 15 min morning break and a 1 hour lunch break, you enter 1.25 into the Break Hours field.

Record My Hours/Mileage
 Hours/Mileage for Rachel Barrett (ID: 55)
 Save

New hours or mileage for Rachel Barrett. (Entries made more than 3 days after work was done will be flagged as late)
 ** Of the hours/miles fields, fill out at least one.

Date / Job	Hours / Job Code	Miles	Description	Commands / Invoice #
<input type="text"/> --select a job--	Start Time: <input type="text"/> End Time: <input type="text"/> Hrs: <input type="text"/> Break hrs: <input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

To add more than one item at a time, start by clicking on "Add new row" below

Job Codes

Within the Job Manager, when a job is created, the choice is made whether to use "job codes" or not. Here, when recording hours and you select a job in the jobs dropdown, if that job requires job codes, the job codes dropdown will appear below the hours field(s).

New hours or mileage for Johannes Bach. (Entries made more than 3 days after work was done will be flagged as late)
 ** Of the hours/miles fields, fill out at least one.

Date / Job	Hours / Job Code	Miles	Description	Commands / Invoice #
<input type="text"/> Anchorman, Marilyn (v)	Start Time: <input type="text"/> End Time: <input type="text"/> Hrs: <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

To add more than one item at a time, start by clicking on "Add new row" below

Presets for the Description

A preset is a way to quickly copy a frequently used value into a text field, while still allowing you the freedom to enter anything you want when needed.

If your installation of SMMware is configured to use 'presets', the preset button will appear to the left of the description field. Clicking on it calls up the popup with the list of presets.

New hours or mileage for Sally Backus. (Entries made more than 3 days after work was done will be flagged as late)
** Of the hours/miles fields, fill out at least one.

Date / Job	Hours / Job Code	Miles	Description	Commands / Invoice #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

To add more than one item at a time, start by clicking on "Add new row" below

The popup of preset values is shown below. Click on a value to insert it into the 'description' text field.

Record My Hours/Mileage

Hours/Mileage for Sally Backus (ID: 60)

Next Return to Listing

New hours or mileage for Sally Backus. (Entries made more than 3 days after work was done will be flagged as late)
** Of the hours/miles fields, fill out at least one.

Date / Job	Hours / Job Code	Miles	Description	Commands / Invoice #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

To add more than one item at a time, start by clicking on "Add new row" below

Add new row Clear all fields

Next Return to Listing

Existing hours, mileage, and expenses for Sally Backus (only items for 'Active' jobs appear)

Date / Job	Hours / Job Code	Miles	Description	Commands / Invoice #
December 02, 2016 Anchorman, Marion	4.00 Hrs	0	Packing	Edit Delete

Be aware that the description entered here appears on the detailed invoices sent to clients and should be written with that in mind regarding grammar and content.

You can edit or delete entries if they do not yet appear on an invoice. Once they are part of an invoice however, instead of the edit and delete buttons, you will see the invoice number.

SMMware has a time limit for considering an entry as 'on time'. The default time period is 3 days, but your company may have a different value configured. If you are late in making an entry, the word "Late" will appear on the "Completion" screen next to any late entries. Also, your company administrator receives an email with details of the late entry as well.

Record My Hours/Expenses/Mileage

Below are the records successfully entered into the system:

Date	Hours	Miles	Company Expenses	Description	Reimbursable Expenses	Results
October 10, 2016	2	25		Organizing		Success! (LATE)
October 11, 2016	3	25	15	Packing		Success! (LATE)
October 12, 2016	4	25		Unpacking		Success! (LATE)

-You were late entering one or more entries. See table above.

[< RETURN](#)

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Time Clock

The Time Clock does not need to be activated at the system level; you can enable it per associate, for each one that you wish to have access to the Time Clock.

To do so, open their Associate Profile for editing, find the 'Enable Time Clock' setting, change it from 'No' to 'Yes', and then Save.

iCalendar URL [?](#): [Get new](#) [Deactivate](#)

Sales Role Privileges:	Marketing Role Privileges:	HR Role Privileges:	Scheduling Role:
Read/Write ?	Read/Write ?	Read/Write ?	Read/Write ?
Don't Monitor Job Events ?			
Manage Jobs (& Clients) :	Manage Flat fees:	Manage Orgs/Contacts:	Manage File Shares:
Read/Write ?	Read/Write ?	Read/Write ?	Read/Write ?
Manage Invoices:	Approve Invoices:	Manage Consignment:	Manage Inventory:
Read/Write ?	Yes ?	Read/Write ?	Read/Write ?
Google Admin:	Event Lead ? :	Homepage Unavail? ? :	Enable Time Clock? ? :
Yes ?	Yes ?	Yes ?	Yes ?
Skill Codes ? :			
<input type="text"/>			

[Save](#) [Delete](#) [Return](#)

Once enabled, the Time Clock icon will appear to the left of the username in the upper left of the page.

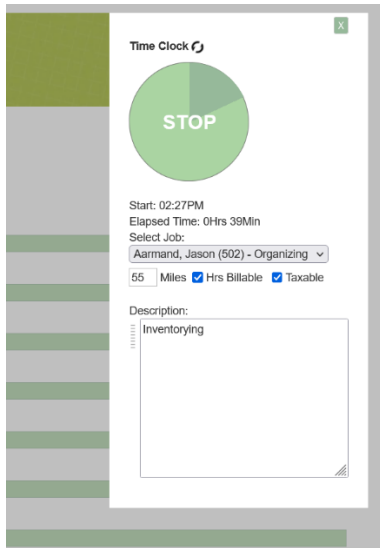
Home Admin • Calendar Associates • Jobs • Sales • Clients Resources • Inventory • Help

superadmin [?](#)

Daily Snapshot

[Unhide All Sections](#)

After clicking on the Time Clock icon, the Time Clock pop up will appear. You will need to choose a Job prior to starting it running. If the Job uses Job Codes, you'll need to pick that as well.



Once running, you can close it and open it again without losing anything, it will still be running. Any changes to the description, travel distance, or billable status will be saved upon changing.

If the time clock is running and you change the Job (and/or Job Code), the running entry is stopped and a new one is started.

SMMware does not record time less than a minute. If you stop the Time Clock after less than a minute, the entry will be deleted. Also, if you realize you picked the wrong job, this saves you from having to separately delete the unwanted entry.


When you stop the running Time Clock entry, the start time will be rounded up to the nearest 15 minute interval (on the hour, 15, 30, or 45 after the hour), and the end time will be rounded down to the nearest 15 minute interval

Note, admins can view and edit your running Time Clock entry, but if they edit it and save any changes, the entry will be closed.

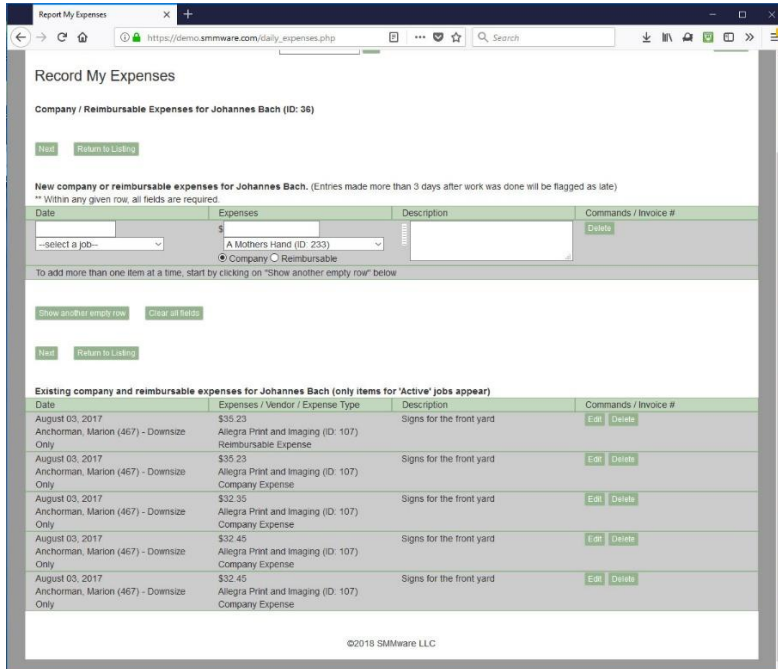
Also, if you forget to stop the running Time Clock entry, SMMware will automatically close it at the end of the day.

Record My Expenses

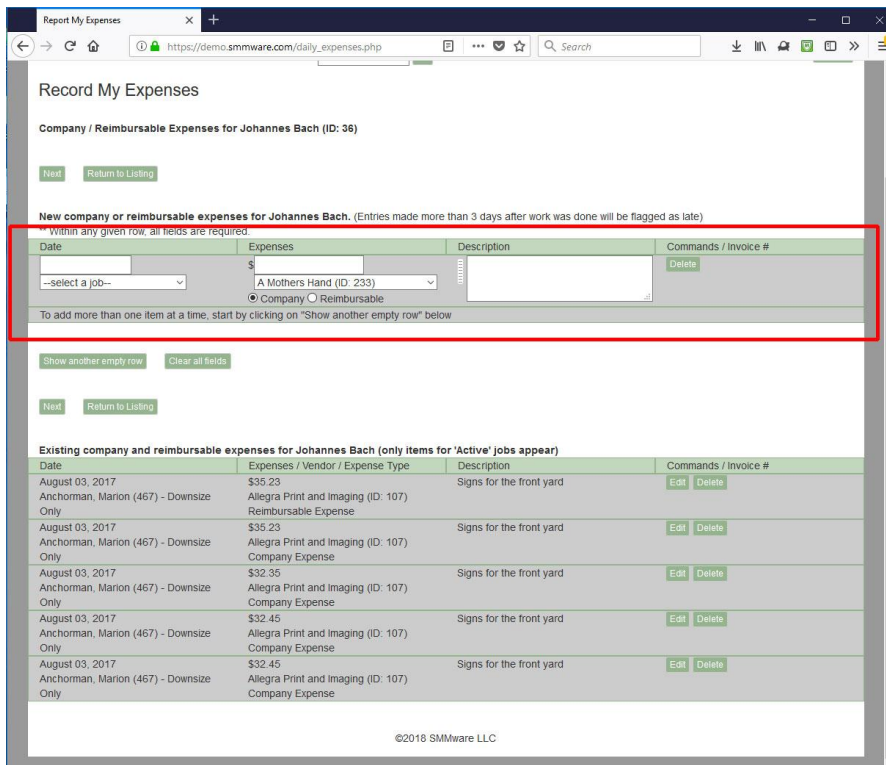
This screen allows you to record expenses where you used the company credit card and also expenses where you paid out of pocket and need to be reimbursed.

	Watch our YouTube video about Recording Hours, Mileage and Expenses at https://youtu.be/aoh2sa1k3Q
---	--

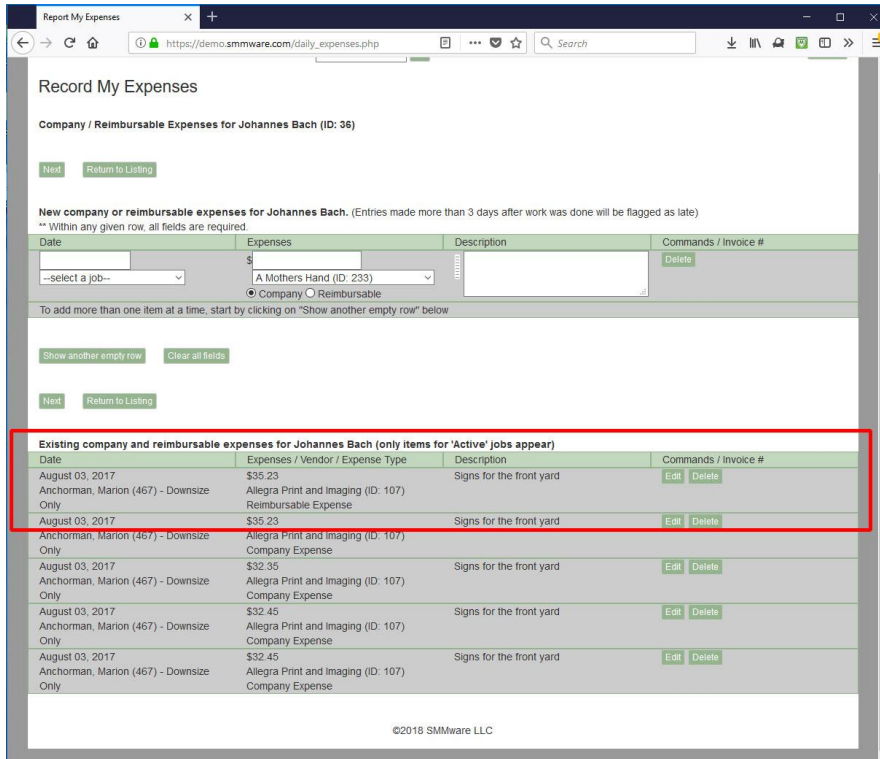
(if this link is broken because we've posted a new version, go to our channel at <https://www.youtube.com/SMMware> to get to the new video)



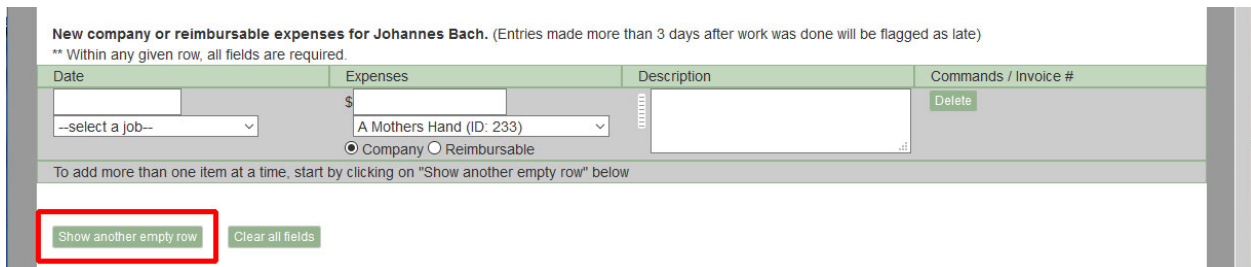
The top section is where you create brand new expense entries.



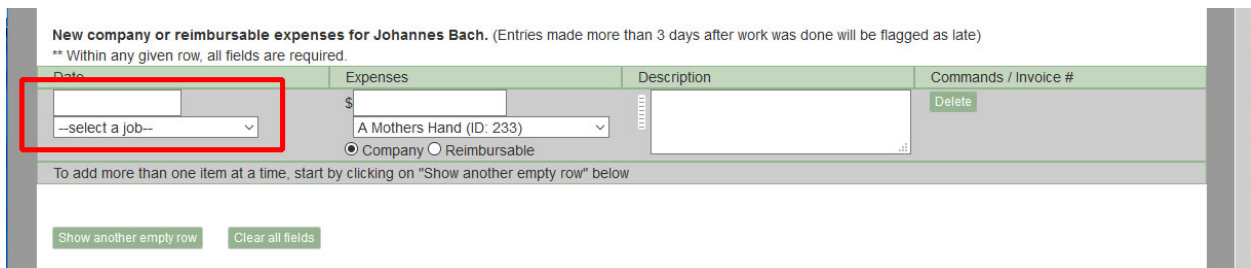
And the bottom section shows you existing entries, for jobs that are still active. Once the job is closed, to see those entries use the command “My Hours/Expense/Mileage History”.



Note, you can add multiple entries in one screen using the “Show another empty row” button.



First, enter a date and select a job for a given entry.



Next, you have to pick a vendor where the money was spent. The list of vendors comes from the "Organizations" section of SMMware, but only those whose profile has the field "QBO Vendor" checked.

New company or reimbursable expenses for Johannes Bach. (Entries made more than 3 days after work was done will be flagged as late)
** Within any given row, all fields are required.

Date	Expenses	Description	Commands / Invoice #
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
--select a job--	A Mothers Hand (ID: 233)		Delete

Company Reimbursable

To add more than one item at a time, start by clicking on "Show another empty row" below

Show another empty row Clear all fields

You also have to indicate whether this expense was paid for using the company credit card, or whether you paid out of pocket and need to be reimbursed.

New company or reimbursable expenses for Johannes Bach. (Entries made more than 3 days after work was done will be flagged as late)
** Within any given row, all fields are required.

Date	Expenses	Description	Commands / Invoice #
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
--select a job--	A Mothers Hand (ID: 233)		Delete

Company Reimbursable

To add more than one item at a time, start by clicking on "Show another empty row" below

Show another empty row Clear all fields

Lastly, for the description, you can use the “presets button” to quickly fill in the description field, if your company has SMMware configured to use presets.

New company or reimbursable expenses for Johannes Bach. (Entries made more than 3 days after work was done will be flagged as late)
** Within any given row, all fields are required.

Date	Expenses	Description	Commands / Invoice #
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
--select a job--	A Mothers Hand (ID: 233)		Delete
<input checked="" type="radio"/> Company <input type="radio"/> Reimbursable			

To add more than one item at a time, start by clicking on "Show another empty row" below

Show another empty row Clear all fields

If your company marks up expenses, you still enter the amount the item(s) were purchased for, SMMware will separately calculate the marked up amount based on the standard markup percentage (as configured in the Settings Editor, Section 2). Admins can adjust the marked up amount by editing a given expense entry.

My Hours/Expense/Mileage History

Top of Screen: Filters

You can leave all of the dropdowns at the default values if desired. However you can limit the output by making selections from the Job and Date Range fields. Click 'Submit' once the dropdowns have the appropriate settings.

Sunny Days Senior Move Managers Operations Database
Powered By SMMware 2.0

Home Admin Associates Jobs Clients/Inquiries Organizations/Contacts Inventory Help

Home >> Associates >> My Hours/Expense/Mileage History Go Logged on as: bbarrett Log Out

My Hours/Expense/Mileage History

FILTERS

Select Job: Start Date: End Date:

All jobs Filter Reset

To see output, please set criteria above as desired and then click on "Filter"

Bottom of Screen: Report

The report provides information per job, showing each line entry. At the end of each job totals for that job are shown. These entries can't be edited, since these jobs are closed.

My Hours/Expense/Mileage History

FILTERS

Select Associate*
Johannes Bach - 36

Select Job:
All jobs

Start Date:

End Date:

Quickbooks Online: Found 26 items to copy.

RESULTS

Report Total Expenses: \$167.71
Report Total Hours: \$105.13
Report Total Miles: 295

Client: Sidney Fremn (ID: 178)
Job: Downsize and Move Services (ID: 193)
Job Status: Closed
Job Begin Date: 2012-06-20
Team Lead: Kathryn Levato

Date Worked	Associate Name (ID)	Hours	Expense Amount	Miles	Service Performed / Expense Description
07/12/12	Johannes Bach (ID: 36)	8.75	\$0.00	0	Packing books and organizing basement
Totals For This Job:		8.75	\$0.00	0	

Client: Kathleen Kartzke (ID: 179)
Job: Move Only (ID: 194)
Job Status: Closed
Job Begin Date: 2012-06-28
Team Lead: Lynn Hough

Date Worked	Associate Name (ID)	Hours	Expense Amount	Miles	Service Performed / Expense Description
-------------	---------------------	-------	----------------	-------	---

At the end of the overall report, totals for provided for Miles, Expense, and Hours.

Training Documents

This page is where you can find any standard instructions or documents which your company has uploaded explaining procedures for you to follow, a combination of documents you read when you first start, and reference material that you might need to refer to often in the course of your work.

Standard Documents

This page is where you can find blank templates which your company has uploaded for shared use. An example of these might be a blank intake form.

Jobs

The Jobs command allows you to see the Listing of jobs. The filters at the top of the page allow you to narrow the listing based on a date range, job type, or job status. When more than one filter is set, a given job must meet all criteria in order to appear.

Manage Jobs

26 records, report generated: 10-21-2016 10:55:52

You can filter the jobs listing in three ways: 1) By date (compared against job "Begin Date"), 2) By job status, 3) By job type
By default, listing leaves out jobs with status "closed".

Start Date: 2017-06-21 End Date: Job Type: --select a job type-- Job Status: --select a job status-- Filter Reset All Filters

1 - 15 16 - 30 >

Click on a header of a column to reorder the table

Job Number	Client Name Represented By	Team Lead	Type	Status	Begin Date	End Date	Estimated Preparation	Estimated Setup	Actual Hours	Edit / Delete
470	Ackerman, Marilyn2	Brian5 Setzer	Organizing	Active	2016-05-15	2016-05-31	5.00	5.00		View
455	Ackerman, Marilyn2	Donna Stewart	Downsize and Move Services	Active	2015-03-26	0000-00-00	38.00	54.00	64.76	View
398	April, Joan	Nisa Bloor	Move Only	Active	2014-07-26	0000-00-00	5.00	5.00	21.00	View
410	Darkis, Joe Betty Dukert	Maria Skywalker	Downsize and Move Services	Recurring	2014-09-10	0000-00-00	0.00	0.00	189.91	View
413	Dunkers, June	Kathryn Levato	Downsize Only	Recurring	2014-10-06	0000-00-00	0.00	0.00	36.32	View
458	Farkus, Elin	Mandy Carlton	Downsize and Move Services	Active	2015-04-10	0000-00-00	0.00	0.00		View

If you click on a heading in the table that lists jobs, it will sort the table based on that column. Clicking on the same heading again will toggle the sorting to the opposite order (descending vs ascending).

Manage Jobs

26 records, report generated: 10-21-2016 10:55:52

You can filter the jobs listing in three ways: 1) By date (compared against job "Begin Date"), 2) By job status, 3) By job type
By default, listing leaves out jobs with status "closed".

Start Date: 2017-06-21 End Date: Job Type: --select a job type-- Job Status: --select a job status-- Filter Reset All Filters

1 - 15 16 - 30 >

Click on a header of a column to reorder the table

Job Number	Client Name Represented By	Team Lead	Type	Status	Begin Date	End Date	Estimated Preparation	Estimated Setup	Actual Hours	Edit / Delete
470	Ackerman, Marilyn2	Brian5 Setzer	Organizing	Active	2016-05-15	2016-05-31	5.00	5.00		View
455	Ackerman, Marilyn2	Donna Stewart	Downsize and Move Services	Active	2015-03-26	0000-00-00	38.00	54.00	64.76	View
398	April, Joan	Nisa Bloor	Move Only	Active	2014-07-26	0000-00-00	5.00	5.00	21.00	View
410	Darkis, Joe Betty Dukert	Maria Skywalker	Downsize and Move Services	Recurring	2014-09-10	0000-00-00	0.00	0.00	189.91	View
413	Dunkers, June	Kathryn Levato	Downsize Only	Recurring	2014-10-06	0000-00-00	0.00	0.00	36.32	View
458	Farkus, Elin	Mandy Carlton	Downsize and Move Services	Active	2015-04-10	0000-00-00	0.00	0.00		View

You can also review the details for any given job. Basic users do not have add/edit/delete permissions. At the top of the page, you will see a table of existing jobs for the relevant client. You can look at the details for one of those jobs using the “View” button.

Marion Anchorman ID: 398
 4984 Rockwood Parkway
 Washington DC 20016
 Tel 1:202-362-7903 Home2, Tel 2:703-966-7472 Cell
 Email: --
 (Client address was current at start of this job)

[Return to Listing](#)

Job Type*: Downsize and Move Services	Job Status*: Active	Team Lead: Donna Stewart - 12	Discount %*: ***
Job Begin Date: 2015-03-26	Job End Date: 2017-08-04	Estimated Prep Hours: 38.00	Estimated Setup Hours: 54.00
Your Custom Field 1:	Your Custom Field 2:	Your Custom Field 3:	Your Custom Field 4:
Your Custom Field 5:	Your Custom Field 6:	Your Custom Field 7:	Your Custom Field 8:
Job Notes: These are notes from www.smmware.com			Assigned Associates: - unavailable
Statusboard Notes *** ***			
Client Fee Model: perJobCode		Associate Pay Model: perAssocProfile	

Moving Information

Current Address (from Client Profile)

Move Out Date: 2016-10-18	Address Title:				
Address 1: 4984 Rockwood Parkway	Address 2:	City: Washington	State: DC	Zip: 20016	Country:

New Address

Move In Date (new address): 2016-10-21	Address Title:	Long Garment Space (ft): 12	Short Garment Space (ft): 15
Address 1: Test a1	Address 2: Test a2	City: Test city	State: Zip: Country: ID 12345

[Return to Listing](#)

At the bottom of the page you will find expandable sections (click on the ‘+’ sign) for Files, Tasks, and more.

[Next](#) [Return to Listing](#)

- + **File Manager** (5 files found)
- + **Events for this Job** (4 events found, ordered by date, desc)
- + **Tasks For This Job** (1 task found)
- + **Notes For This Job** (0 notes found)
- + **Calls For This Job** (0 calls found)
- + **Invoices for this Job** (0 invoices found)
- + **Jobs For This Client** (6 jobs found)
- + **History of Team Leads**

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Client

For the Clients command you have permission to see a listing of entries, plus the details of any given entry.

Manage Clients
Report generated: Jun 29 2018 11:58 AM, 85 records

Start Date: End Date: Status: Active Act as Reference: All [Filter](#) [Reset](#)

Listed alphabetically by last name. By default, only clients with active jobs are shown.

1 - 50 - 100 >

Anchorman, Marion (ID: 398) 123 4th St Yardmill City, NY 12345 202-362-7903 Home2	View
April, Joan (ID: 350) 1801 E. Jefferson St. Unit 229; The Ring House Rockville, MD 20852 301-946-4823 Home brian4@purplebrain.com	View
Bamier, Bella (ID: 41) 7028 Wilson Lane Bethesda, MD 20817 na brian2@smmware.com	View
Bartzeman, Sandy (ID: 20) 1001 Carroll Parkway Unity 314 Frederick, MD 21702	View

By default, only clients with active jobs are shown. You can click use the Status dropdown in the filter section to see clients whose jobs are all closed, or new clients who do not yet have any jobs created.

Manage Clients
Report generated: Jun 29 2018 11:58 AM, 85 records

Start Date: End Date: Status: Active Act as Reference: All [Filter](#) [Reset](#)

The view page let you see details about the client, such as address, telephone number, and client representative (if applicable).

Manage Clients

[Return to Listing](#) [Printable Version](#)

Client ID: 398

Jobs for this client (Click to view/edit): [Move Only](#) | [Move Only](#) | [Organizing](#) | [Organizing](#) | [Downsize Only](#) | [Downsize and Move Services](#)

Salutation: Ms.	First Name*: Marion	Last Name*: Anchorman	Salutation:	Spouse First Name:	Spouse Last Name:
Phone 1: 202-362-7903	Description 1: Home2	Phone 2: 703-966-7472	Description 2: Cell	Email:	
Client Representative: None selected	Representative Relationship: None selected		Act as Reference: Yes	Referred by: Category: realtor Company: Weichert Realtors Person: Nancy Drew	
Your Custom Field 1: --	Your Custom Field 2: --	Your Custom Field 3: --	Your Custom Field 4: --		
Client Notes/Bio Bio bio bio					

Current Address ([Edit at Job 476](#))

Address 1: 123 4th St	Address 2:	City Yardmill City	State NY	Zip 12345	Country USA
Move In Date: 2017-01-02	Move Out Date: Short Garment Space (ft)	Address Title	Long Garment Space (ft)		

[Return to Listing](#) [Printable Version](#)

At the top of the page you will see links to any and all jobs for this client.

Manage Clients

[Return to Listing](#) [Printable Version](#)

Client ID: 398

Jobs for this client (Click to view/edit): [Move Only](#) | [Move Only](#) | [Organizing](#) | [Organizing](#) | [Downsize Only](#) | [Downsize and Move Services](#)

Salutation: Ms.	First Name*: Marion	Last Name*: Anchorman	Salutation:	Spouse First Name:	Spouse Last Name:
Phone 1: 202-362-7903	Description 1: Home2	Phone 2: 703-966-7472	Description 2: Cell	Email:	
Client Representative: None selected	Representative Relationship: None selected		Act as Reference: Yes	Referred by: Category: realtor Company: Weichert Realtors Person: Nancy Drew	
Your Custom Field 1: --	Your Custom Field 2: --	Your Custom Field 3: --	Your Custom Field 4: --		
Client Notes/Bio Bio bio bio					

Current Address ([Edit at Job 476](#))

Address 1: 123 4th St	Address 2:	City Yardmill City	State NY	Zip 12345	Country USA
Move In Date: 2017-01-02	Move Out Date: Short Garment Space (ft)	Address Title	Long Garment Space (ft)		

[Return to Listing](#) [Printable Version](#)

At the bottom of the page, you will see some expandable sections for Tasks, Notes, etc.

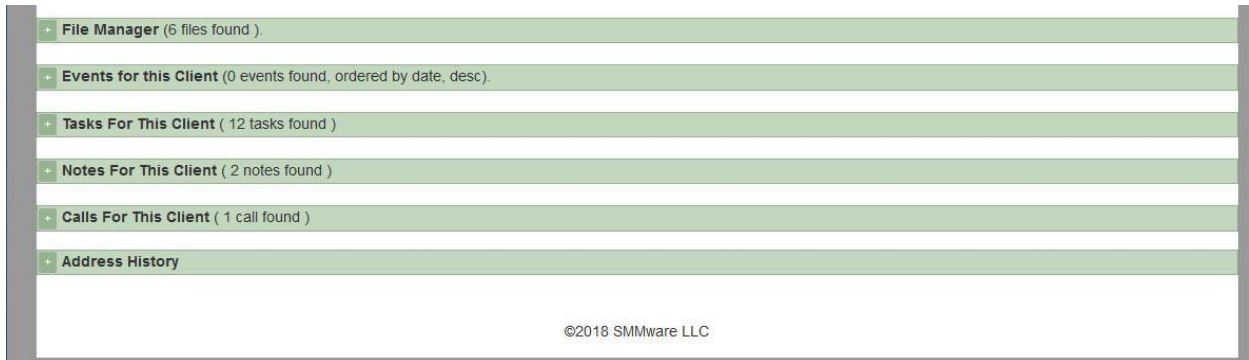
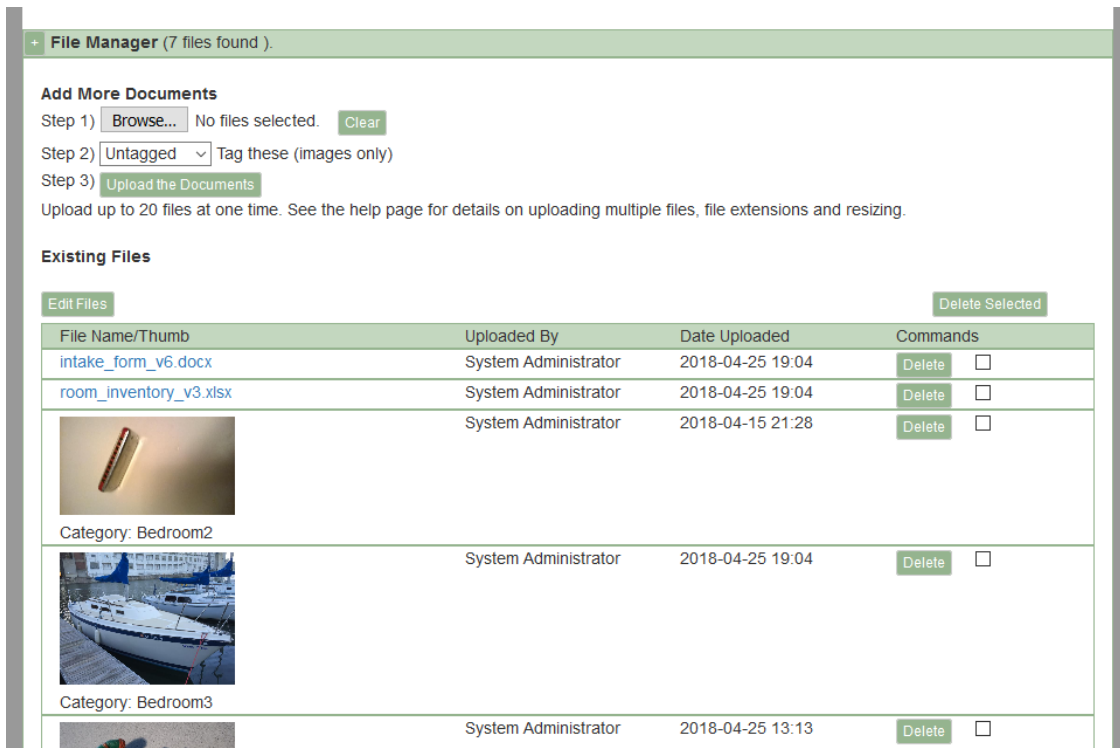


Image and File Management

SMMware allows you to upload images and other file types.

	<p>Watch our YouTube video about the File Manager at https://youtu.be/ CoutpoSkAI (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)</p>
--	--

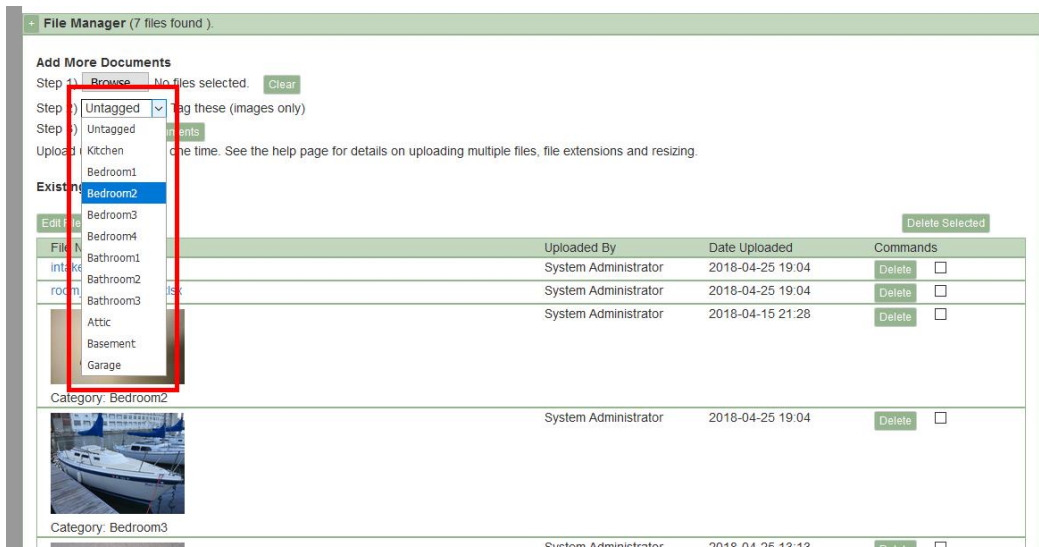
Below is a typical view of the file/image manager.



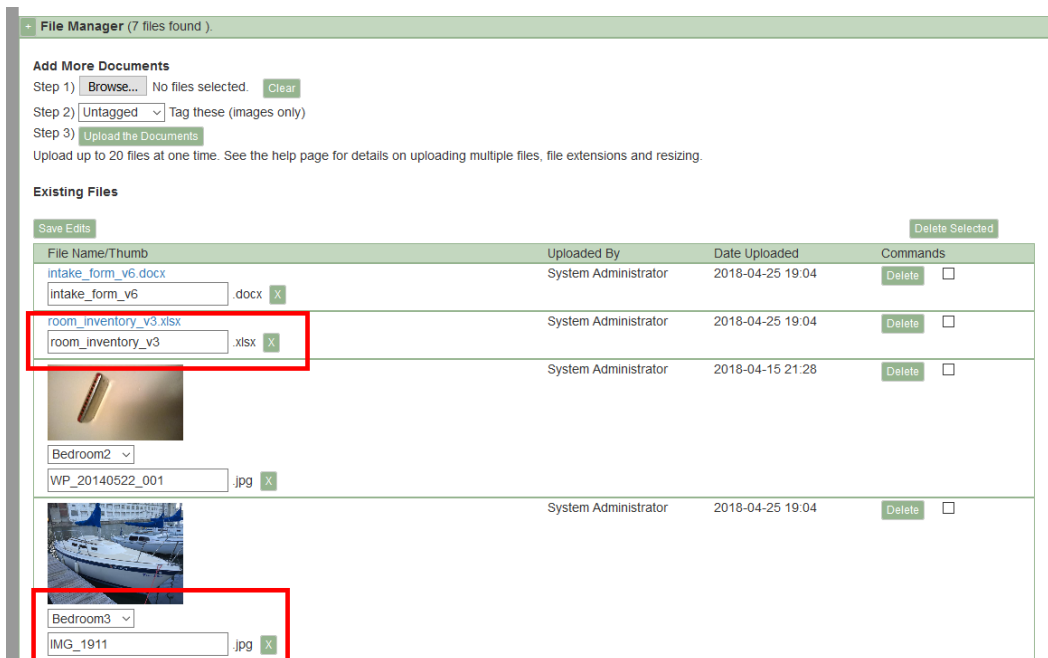
To uploading new files , first use the “Browse” button, which will open a popup window. For a desktop machine, it allows you to navigate your hard drive for files and images. On a phone, it will similarly open the phone’s file manager. You can multiselect images and files as desired.

SMMware allows you to assign tags to images, and groups/orders the images per the tag. Non-image files (Word Docs, etc.) are always “Untagged” and appear at the top of the list. Any images added later will still be grouped with others of the same tag.

The list of tags is configurable for each SMMware client.





Editing mode allows you to rename any file, whether it is an image or not. For images, you can also change the tags. Note that you cannot edit the file extension.



You can rotate images using the counter-clockwise and clockwise arrows.

Existing Files

[Edit Files](#) (Un)Select All [Delete Selected](#)

File Name/Thumb	Uploaded By	Date Uploaded	Commands
 Tag: Kitchen IMG_2205.jpg	System Administrator	2018-05-17 08:12	Delete <input type="checkbox"/>
	System Administrator	2018-05-17 08:12	Delete <input type="checkbox"/>

Rotation succeeded

Add More Documents

Step 1) [Browse...](#) No files selected. [Clear](#)

Step 2) [Untagged](#) Tag these (images only)

Step 3) [Upload the Documents](#)

Upload up to 20 files at one time. See the help page for details on uploading multiple files, file extensions and resizing.

Existing Files

[Edit Files](#) (Un)Select All [Delete Selected](#)

File Name/Thumb	Uploaded By	Date Uploaded	Commands
 Tag: Kitchen IMG_2205.jpg	System Administrator	2018-05-17 08:12	Delete <input type="checkbox"/>
	System Administrator	2018-05-17 08:12	Delete <input type="checkbox"/>

Organizations

The Organizations feature is like an address book of organizations useful to your company. These can be businesses where your company spends money for supplies for services which makes them Vendors, and they will have “QBO Vendor” checked in their profiles. Entries in this section can also be Organizations that you recommend to clients.

On the Listing screen, organizations are grouped into categories. At the top of the page on the Listing screen, you will find the set of categories into which organizations fall. Clicking on a link jumps you down the page to the group of organizations assigned to that category.

The screenshot displays the SMMware Organization Manager interface. At the top, there is a header for "Sunny Days Senior Move Managers Operations Database" with a logo and the text "Powered By SMMware". Below the header is a navigation menu with links: Home, Admin, Associates, Jobs, Clients/Inquiries, Organizations/Contacts, Consignment, Inventory, and Help. The current page is "Organization Manager", and the user is logged in as "admin".

The main content area shows "347 records included." and options to "Close All Panels", "Open All Panels", "Alphabetical View", and "Export Organizations". There is a button to "Add A New Organization".

+ Accounting	<input type="checkbox"/>
+ Advertising	<input type="checkbox"/>
+ Auction & Consignment	<input type="checkbox"/>
+ Care Management Agencies	<input type="checkbox"/>
+ Care Management-Aides	<input type="checkbox"/>
+ Communications	<input type="checkbox"/>
+ Community-CCRC	<input type="checkbox"/>
+ Consignment & Retail	<input type="checkbox"/>
+ Construction	<input type="checkbox"/>
+ Engraving	<input type="checkbox"/>
+ Finance	<input type="checkbox"/>
+ Furniture	<input type="checkbox"/>
+ Government	<input type="checkbox"/>
+ Graphics	<input type="checkbox"/>
+ Healthcare	<input type="checkbox"/>
+ Home Improvement	<input type="checkbox"/>
+ Insurance	<input type="checkbox"/>
+ Large format printing/displays	<input type="checkbox"/>
+ Legal	<input type="checkbox"/>
+ Marketing	<input type="checkbox"/>
+ Moving and Storage	<input type="checkbox"/>
+ Nursing Aide	<input type="checkbox"/>
+ Printing	<input type="checkbox"/>
+ Publishing	<input type="checkbox"/>
+ Real Estate	<input type="checkbox"/>
+ Retail	<input type="checkbox"/>
+ Senior Services	<input type="checkbox"/>
+ Software	<input type="checkbox"/>
+ Solid Waste	<input type="checkbox"/>
+ Solid Waste/Roll-off Containers	<input type="checkbox"/>

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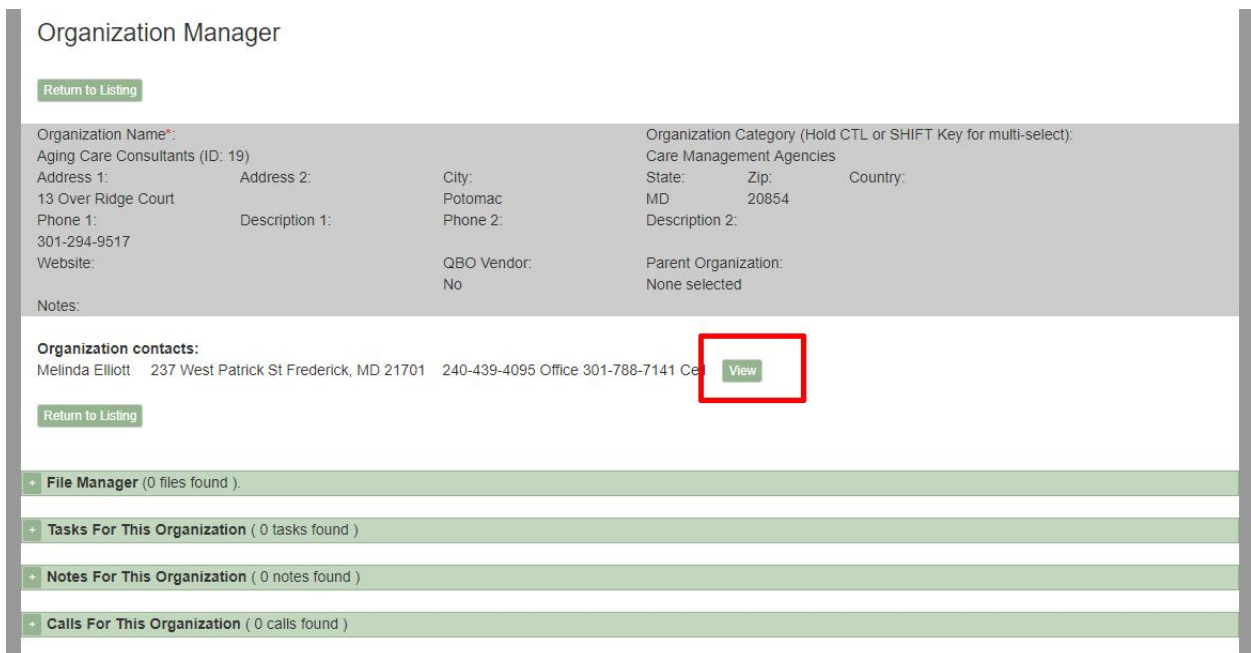
Click on the '+' sign to expand a category and see the individual entries within it.



For each organization, some detail is provided: address, phone, and website.

An organization can be assigned to multiple categories, and can appear multiple times on the page, once per relevant category.

You can click on the View button to see the Details screen. At the top of this screen, you will see a list of Contacts (there can be more than one) who are associated with this Organization. Clicking on the link will let you view the details for that Contact.



Contacts

The Contacts feature serves two purposes within SMMware. A Contact can act as a representative for your clients, such as when an adult child manages the job on behalf of a parent with memory issues. A client can only have one Contact (representative).

A Contact can also optionally be associated with an Organization. An Organization can have multiple contacts.

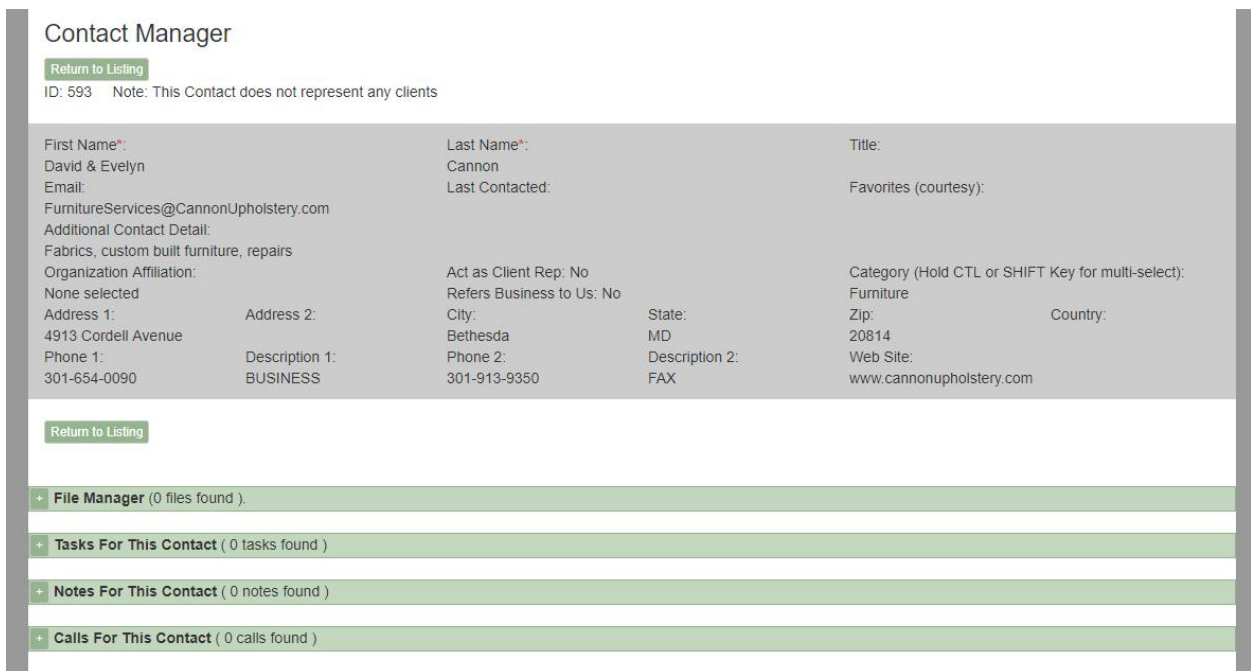
On the Listing screen, Contacts are grouped into categories, in similar fashion as the Organizations are. There is also the same set of categories, matching what is used for Organizations.



Again, expand a category by clicking on the '+' button



The Details screen can tell you which Organization a Contact is affiliated with, if any. It can also have a portrait image for the Contact.



During the holidays or on other occasions, some companies send gifts to Contacts (typically to those affiliated with an Organization, as opposed to ones serving as Client Representatives). The “Favorites” field allows you to enter a short note regarding what sort of gift this person likes.

Homepage, & Tasks/Notes/Calls

These features help you remember upcoming appointments, or to record the results of an interaction. It can be used if you are meeting someone for lunch, for example.

Below is the entry screen for a Task.

Home >> Manage Customer Relations Go Logged on as: admin Log Out

Manage Customer Relations

Step 1 of 3: Add | Edit

Task (ID: 36) for job Anchorman, Marion - Organizing (ID: 470) [Edit/View Job](#)

Due Date*: 2017-11-09 09:29 1st Reminder Email: 2016-11-15 16:29 2nd Reminder Email: 2016-11-15 16:50

Priority: Medium Status: Finished Date Completed:

Summary*: This is a summary of the item. Assigned to: System Administrator Created By: Jamil Dylan

Notes*: these are the notes.

Save Return

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Below is the entry screen for a Call.

Home >> Manage Customer Relations Go Logged on as: admin Log Out

Manage Customer Relations

Step 1 of 3: Add | Edit

Call (ID: 101) for job Anchorman, Marion - Downsize and Move Services (ID: 455) [Edit/View Job](#)

Call Date: 2017-11-19 14:37 1st Reminder: 2nd Reminder:

Summary: For Assoc 60, Praesent molestie vestibulum ante Phone: Call Direction: Outbound

Status: Finished Assigned to: Sally Backus Created by: System Administrator

Notes: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Praesent molestie vestibulum ante. Vivamus molestie justo. Nunc nec eros. Mauris cursus diam. In pulvinar, nisi ut nonummy convallis, metus quam fringilla leo, eu tincidunt ante mi quis nunc. Suspendisse sed ipsum vitae neque pretium fermentum. Nam dictum accumsan est.

Save RETURN

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Below is the entry screen for a Note.

Manage Customer Relations

Step 1 of 3: Add | Edit

Note (ID: 112) for job Anchorman, Marion - Downsize and Move Services (ID: 455) Edit/View Job

Summary:

Date Created:

2017-12-18 14:10

Created By:

System Administrator

Notes:

test 133

Save
RETURN

©2018 SMMware LLC

You may prefer to put entries here instead of just putting them into a smart phone because SMMware lets you view the listing of Task/Call/Note items, providing a history of your interactions, and because this list can be viewed by others in your company.

When looking at the Tasks/Calls/Notes sections in a Job Profile or Client profile, the entries in the list will be a mixture of everything created for that Job or Client, regardless of who created the item or who the item is assigned to.

Save
Return to Listing

+ File Manager (0 files found)

+ Events for this Job (0 events found, ordered by date, desc)

+ **Tasks For This Job** (2 tasks found)

Tasks for job April, Joan (398) - Move Only (ID=398), 2 results found. New Task See All Tasks

Add A Task Group: Pre-Sale Consultation Planning Pre-Move Packing Pet Care

Due Date	Reminder 1, Reminder 2	Status	Priority	Assigned To	Commands
Summary		Date Completed	Created By		
2018-01-12 11:00	2018-01-12 11:00 Will send email 2018-01-12 11:00 Will send email	Not Started	Medium	Owner Owner	Edit Delete
Summary: ATTEND SALES CALL		--	Created By: System Administrator		
2018-01-12 11:00	2018-01-12 11:00 Will send email 2018-01-12 11:00 Will send email	Not Started	Low	System Administrator	Edit Delete
Summary: CONFIRM APPT W MOVER.TL AND/OR LENNY		--	Created By: System Administrator		

+ Notes For This Job (0 notes found)

+ Calls For This Job (0 calls found)

Task Groups

In a Tasks section of a Job Profile, you may see buttons next to a label “Add a Task Group” (if your system is configured to use them, and if you have permissions). Each button represents a group of tasks that can be added to the job in one operation. After clicking one, the next screen lets you revise the defaults prior to saving.

Save Return to Listing

+ File Manager (0 files found)

+ Events for this Job (0 events found, ordered by date, desc)

+ Tasks For This Job (2 tasks found)

Tasks for job April, June (200) Move Only (ID=200) 2 results found New Task See All Tasks

Add A Task Group: Pre-Sale Consultation Planning Pre-Move Packing Pet Care

Due Date	Reminder 1, Reminder 2	Status	Priority	Assigned To	Commands
Summary		Date Completed	Created By		
2018-01-12 11:00	2018-01-12 11:00 Will send email 2018-01-12 11:00 Will send email	Not Started	Medium	Owner Owner	Edit Delete
Summary: ATTEND SALES CALL		--	Created By: System Administrator		
2018-01-12 11:00	2018-01-12 11:00 Will send email 2018-01-12 11:00 Will send email	Not Started	Low	System Administrator	Edit Delete
Summary: CONFIRM APPT W MOVER.TL AND/OR LENNY		--	Created By: System Administrator		

+ Notes For This Job (0 notes found)

+ Calls For This Job (0 calls found)

Homepage (Daily Snapshot)

The sections on the homepage are different than those on the Job or Client profile pages in that these lists only include items relevant to you, allowing you to gauge your workload and schedule for the day, undistracted by having your items spread across multiple locations and mixed in with other people's items.

Sunny Days Senior Move Managers Operations Database
Powered By SMMware 2.0

Home Admin Associates Jobs Clients/Inquiries Organizations/Contacts Inventory Help

Home Go Logged on as: bbarrett Log Out

Daily Snapshot

You are now logged in as bbarrett

- My Tasks (1 task)
- My Calls (0 calls)
- My Hourly & Expense Items Needing Revision (0 items)
- My Teams, As Member (1 job)
- My Schedule

Previous Today Next Monthly View Weekly View Daily View

June 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Key:

- Job
- Client
- Associate
- Company
- Available
- Custom1
- Custom2
- Custom3
- Custom4
- Custom5

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My Tasks

These are unfinished tasks assigned to you, whether you created them or not. This works the same for an admin as for a regular user.

My Calls

These are not yet completed Calls assigned to you, whether you created them or not.

My Teams, As Member

This is a listing of all teams you are on as a regular member (not Team Lead, since those will appear in the section above).

My Schedule

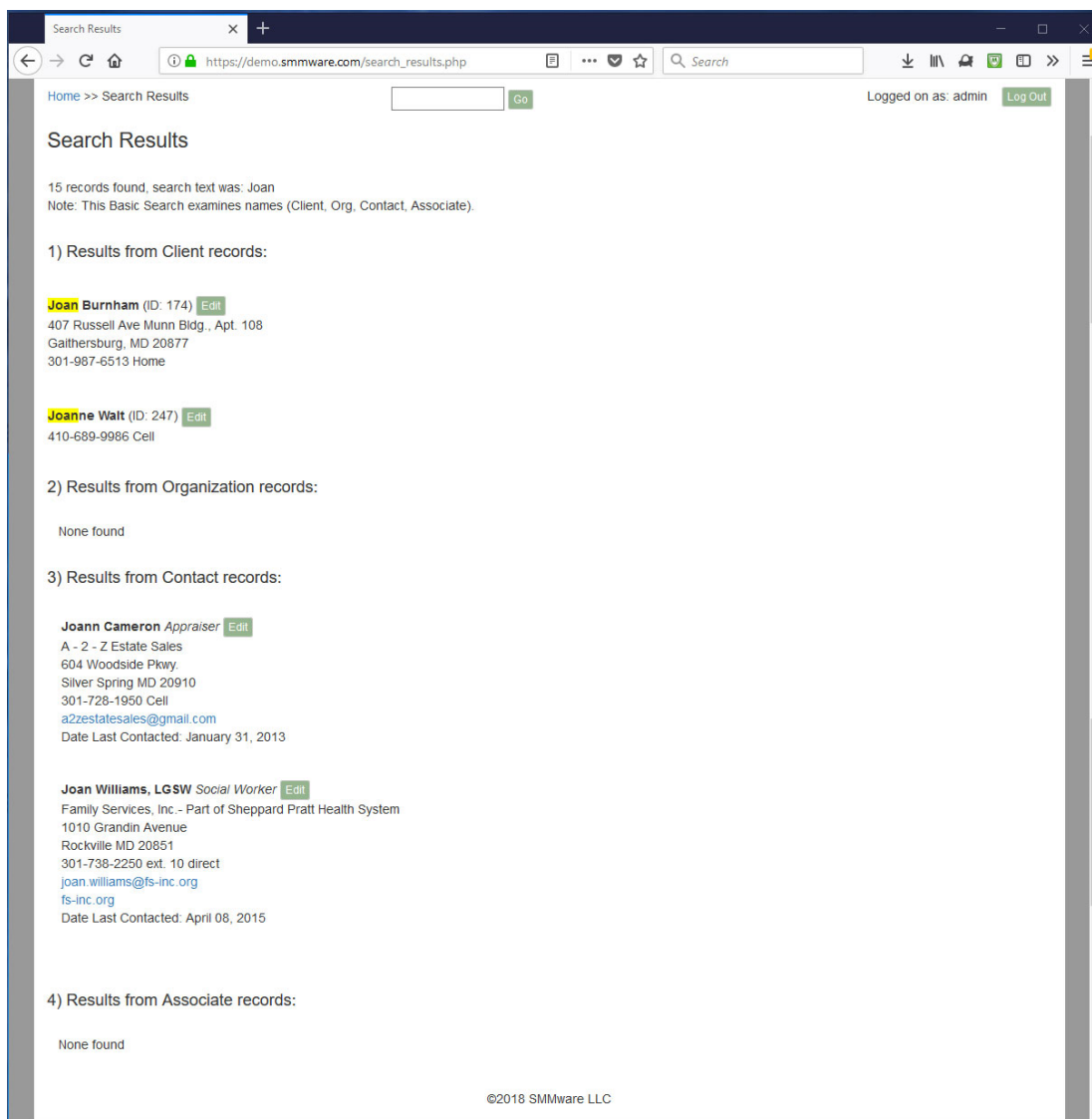
This calendar shows only events for which you are an attendee, or are the contact for the event.

Search

SMMware includes a handy search function for finding a given Client, Contact, Organization, or Associate. The search field can be found at the top of each page.



The results are broken down into sections and include links for jumping to the relevant record.



Map Links

There are a number of places where you can find a link with the label “Map”, typically just after an address. Click on it will open a mapping application, both on a workstation/laptop and also on mobile devices. These links can be found in event details, and also client and organization listings

Events


While Basic Users do not create events for the calendar, there are a few things you should know.

There are three approaches for adding attendees to events, ‘Direct’, ‘Invite’, and ‘Availability’.

For the ‘Direct’ approach, the event creator knows exactly who should attend and simply assigns them, emails are sent to confirm.

For the ‘Invite’ approach, you will receive an invitation email. It contains a link to a webpage where you can indicate whether you are interested in this task or not. Once the Team Lead chooses the team from those who were interested, you will receive another email, this one indicating whether you will be part of this particular event. After the team has been set, if things change (as they often do), you will also receive follow-up emails. If something changes on your end, the contact section in the email lets you know who to call/email.

For the ‘Availability’ approach, you enter the times as which you are available to work into the system, using the command at “Associates”->”My Availability”. Your system may be configured for you to enter when you cannot work instead, using the command “Associates”->”My Unavailability”. Simply click and drag for a timespan in a given day to create an entry. Click on an entry to delete it. You can resize and drag & drop entries as well. You can drag across multiple days and SMMware will break the selection up into individual days.

	Watch our YouTube video about Availability Based Scheduling at https://youtu.be/cKBqnlZFNqA (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)
---	---

An important consideration is travel time. When you say that you are available starting at 1pm, does that mean that you will walk out the door of your house at 1pm and can actually start work at 1:30pm (assuming ½ of travel), or does it mean that you are willing to walk out the door at 12:30 so as to start work at 1pm? Either approach can work as long as everyone company wide makes the same assumption.

My Availability

System Administrator - 1

Note: Changes here are saved as they are made (there is no Save button)

Previous Today Next

Sept 2 – 8, 2018

Refresh

	Sun 9/2	Mon 9/3	Tue 9/4	Wed 9/5	Thu 9/6	Fri 9/7	Sat 9/8
all-day							
8am		8:00 - 11:00 Available	8:00 - 5:00 Available	8:00 - 5:00 Available	8:00 - 12:00 Available	8:00 - 10:30 Available	
9am							
10am							
11am		11:00 - 1:00 We will be...				11:00 - 5:00 Available	
12pm							
1pm		1:00 - 5:00 Available			1:00 - 5:00 Available		
2pm							
3pm							
4pm							
5pm							
6pm							
7pm							

Calendar

Your personal calendar is on the homepage, listing events you are part of. The different types of events are color coded, with a key at the bottom of the calendar.

View Calendar

Add New

Previous Today Next

Monthly View Weekly View Daily View

April 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23 9a Marion Anchorman, Downsize and Move Services	24 3p - 4p 5 people w...	25 11a - 3p Two people...	26 3p - 5p Meet at th... 6:40p - 7:10p We'll have...	27 1p - 4p Elin Farkus, Downsize and Move Services 2:30p - 4p We will ha...	28 10a - 12p Three peop... 12p - 6p Large Job ... 2p - 3p Marion Anchorman, Downsize and Move Services
29	30	1	2	3	4	5

Key:

Job
Client
Associate
Company
Available

Custom1
Custom2
Custom3
Custom4
Custom5

Pick only one dropdown to filter against

Filter By Job ID
 Filter By Client ID
 Filter By Associate ID
Filter Events Reset Filter

The item is shown with an abbreviated description. When the item is clicked on, a popup appears showing the full details. The user can then click on the popup to close it.

[Add New](#)

[Monthly View](#)
[Weekly View](#)
[Daily View](#)

[Previous](#)
[Today](#)
[Next](#)

April 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1			4	5	6	7
8			11	12	13	14
15			18	19	20	21
22			25	26	27	28
29	30	1	2	3	4	5

Edit

Event type: Job

Marion Anchorman, Downsize and Move Services (ID: 455): We will have a team of three, with 1 putting stickers on furniture and 2 packing.

Attendees: Brian Setzer

Key:

Job	Client	Associate	Company	Available
Custom1	Custom2	Custom3	Custom4	Custom5

Pick only one dropdown to filter against

Filter By Job ID --select job--	Filter By Client ID --select client--	Filter By Associate ID --select associate--	Filter Events	Reset Filter
------------------------------------	--	--	-------------------------------	------------------------------