User Manual for Team Lead Users, SMMware

Version 1.1.9

Note: See the separate manual for Basic Users for essential functions which will not be repeated here.

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Introduction

Where Basic Users typically have viewing rights for various (but not all) commands, Team Lead users will have increased management rights (add/edit/delete). They can enter time on behalf of others, approve hours/expenses/mileage of others, approve invoices, manage vendors and contacts, and create events for the calendar. Team Leaders are higher level users and should also be familiar with the tasks of the Basic User and should consult the Basic User manual.

We'll start this manual with commands where Team Leads have management rights but Basic Users have only viewing access. We'll examine only the additional capabilities which Team Leads have.

Each SMMware client has their own URL, of the form of http://company-name.smmware.com. The URL will jointly decided between you and SMMware staff. 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:

YouTube	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)

Requirements

To use SMMware, you will need the following:

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.

Record My Hours/Mileage

For this command, the only difference for the Team Leader User is that they get an initial screen to select a user, via a dropdown of associates and can therefore make Hours/Mileage entries on behalf of associates other than themselves.

Once you have selected an associate and a job, the next screen lets you manage the entries just as you would for your own hours/mileage. Starting with the next screen, the functionality is the same as for a Basic User.

Record My Expenses

For this command, the only difference for the Team Leader User is that they get an initial screen to select a user, via a dropdown of associates and can therefore make Expense entries on behalf of associates other than themselves.

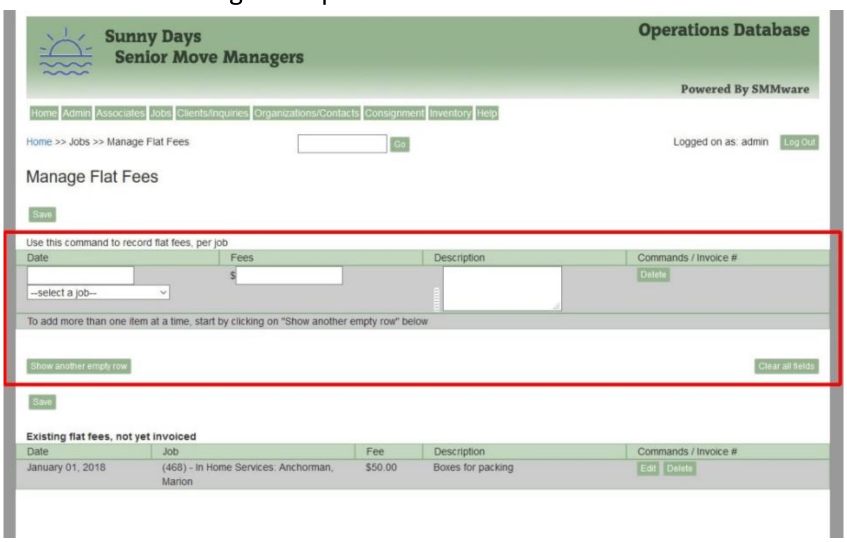
Flat Fees

These are set amounts not based on hours worked. An examples might be $50 for packing materials. Depending on your companies configuration within SMMware, you may be entering these fees, or it may be the responsibility of a Team Lead.

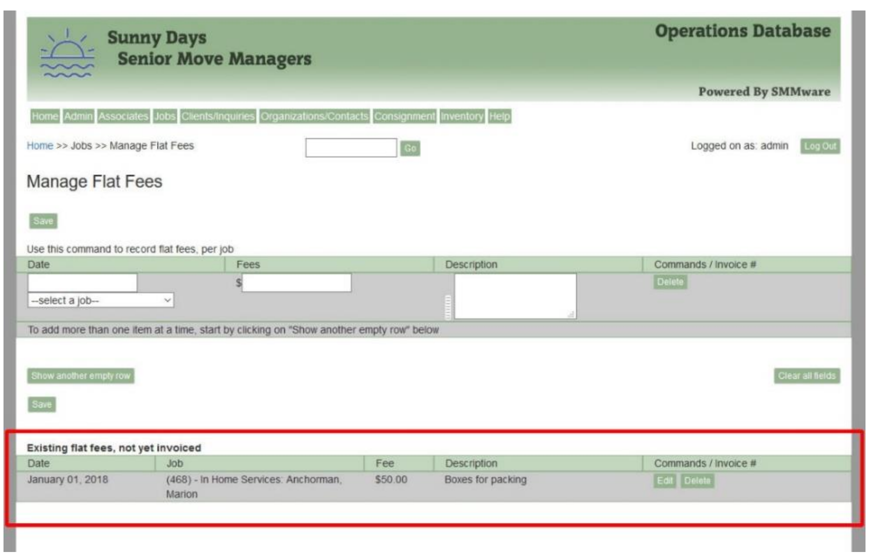
Much like hourly entries, there are presets which in this case include both the descriptive paragraph plus the fee amount. Selecting one fills in the fields.

Manage Flat Fees Command

This command works much the same as that for entering hours/mileage or expenses, where new entries can be created using the top section.



And existing entries are listed in the bottom section.



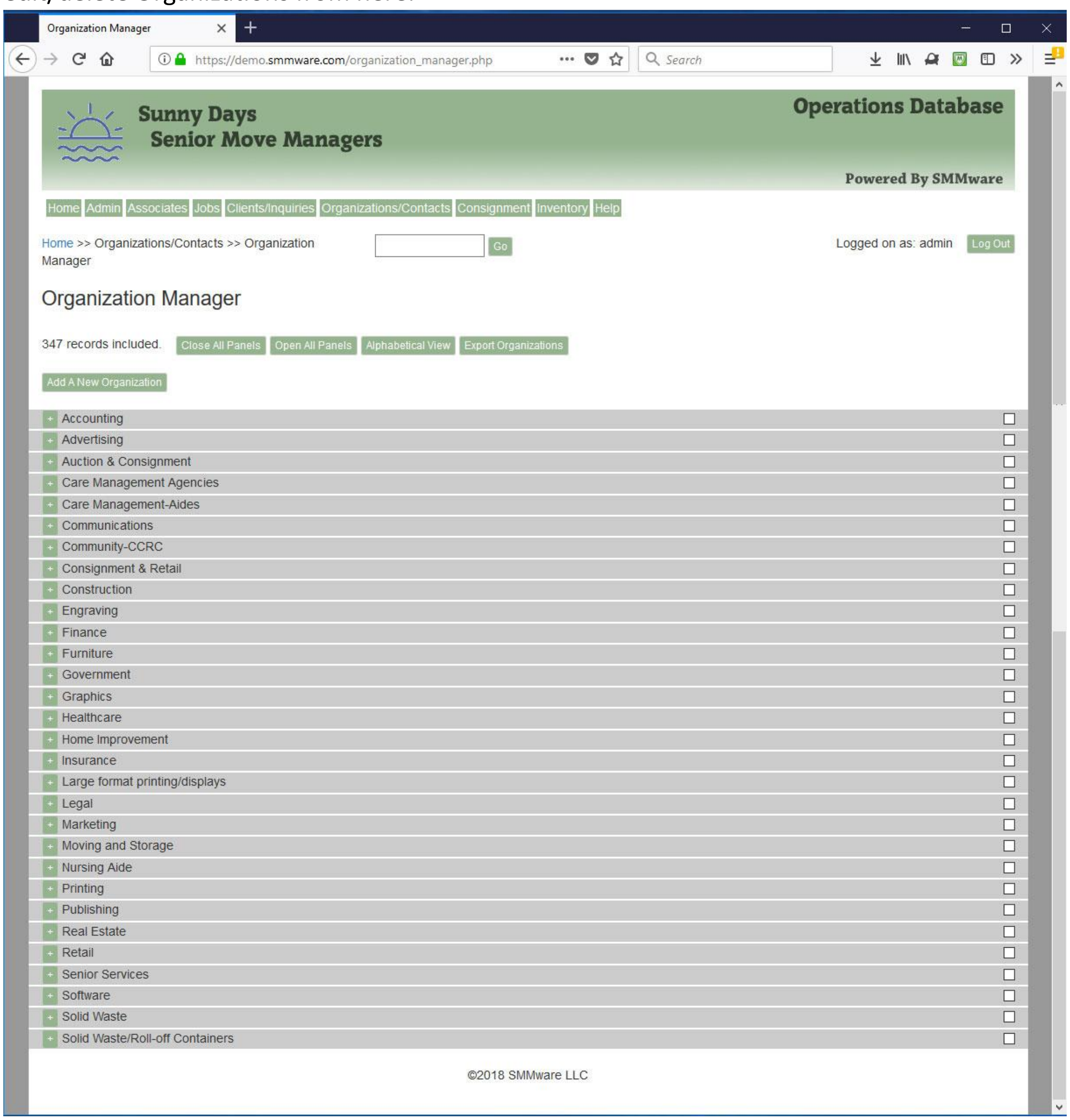
Flat Fees History Command

This command lets you view older entries, after the job has been closed.

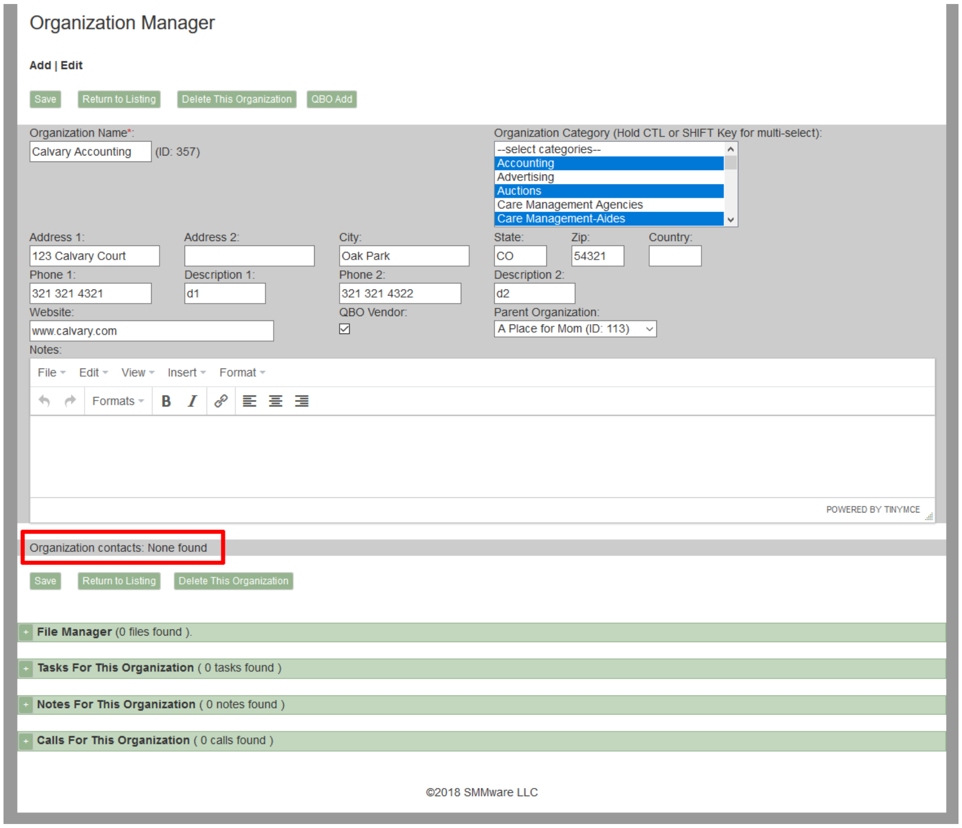
Organizations

	Watch our YouTube video about the Organization Manager and Contact Manager at https://youtu.be/-uLyIQrYk_0 (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)

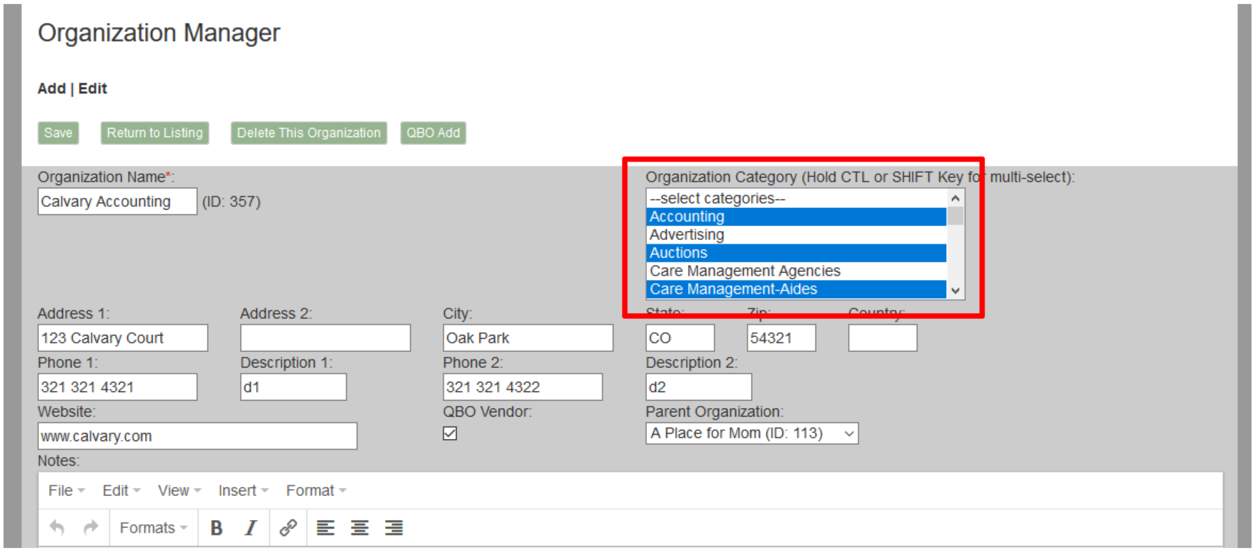
The listing screen initially shows a set of categories which organizations are assigned to. An organization can be assigned to more than one category. There is a button at the top of the page for adding a new Organization. Click on the '+' sign to expand a category and see the individual entries. You can edit/delete Organizations from here.



If this Organization has any Contacts in the system, they will be listed towards the bottom of the screen.

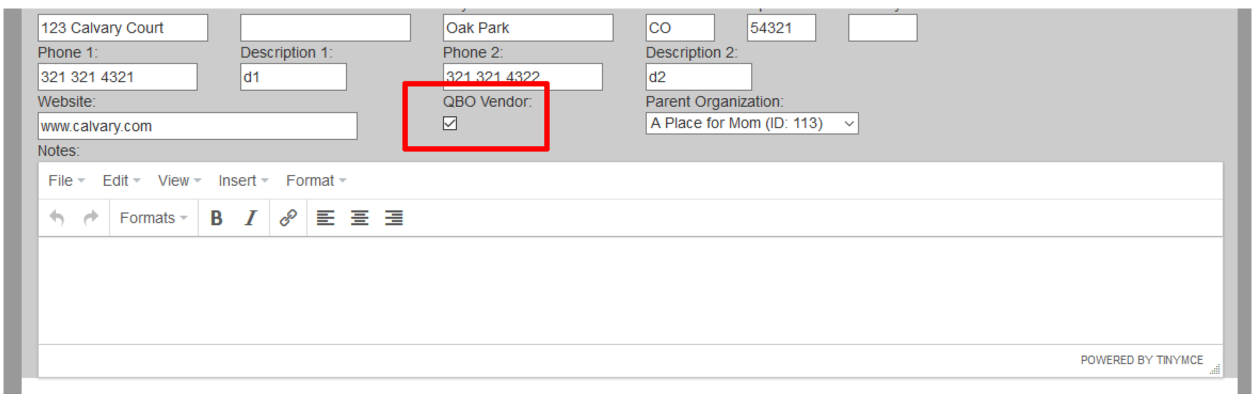


An Organization can be assigned to multiple categories by holding down the CTRL key while selecting items in the dropdown.



The other fields (address, etc.) are self explanatory.

If you spend money with an Organization you should check the “QBO Vendor” checkbox. When entering expenses, that setting allows this organization to appear in the list of vendors.



The Parent Organization is useful if this is a local chapter of a larger organization, with the national headquarters having a separate address.

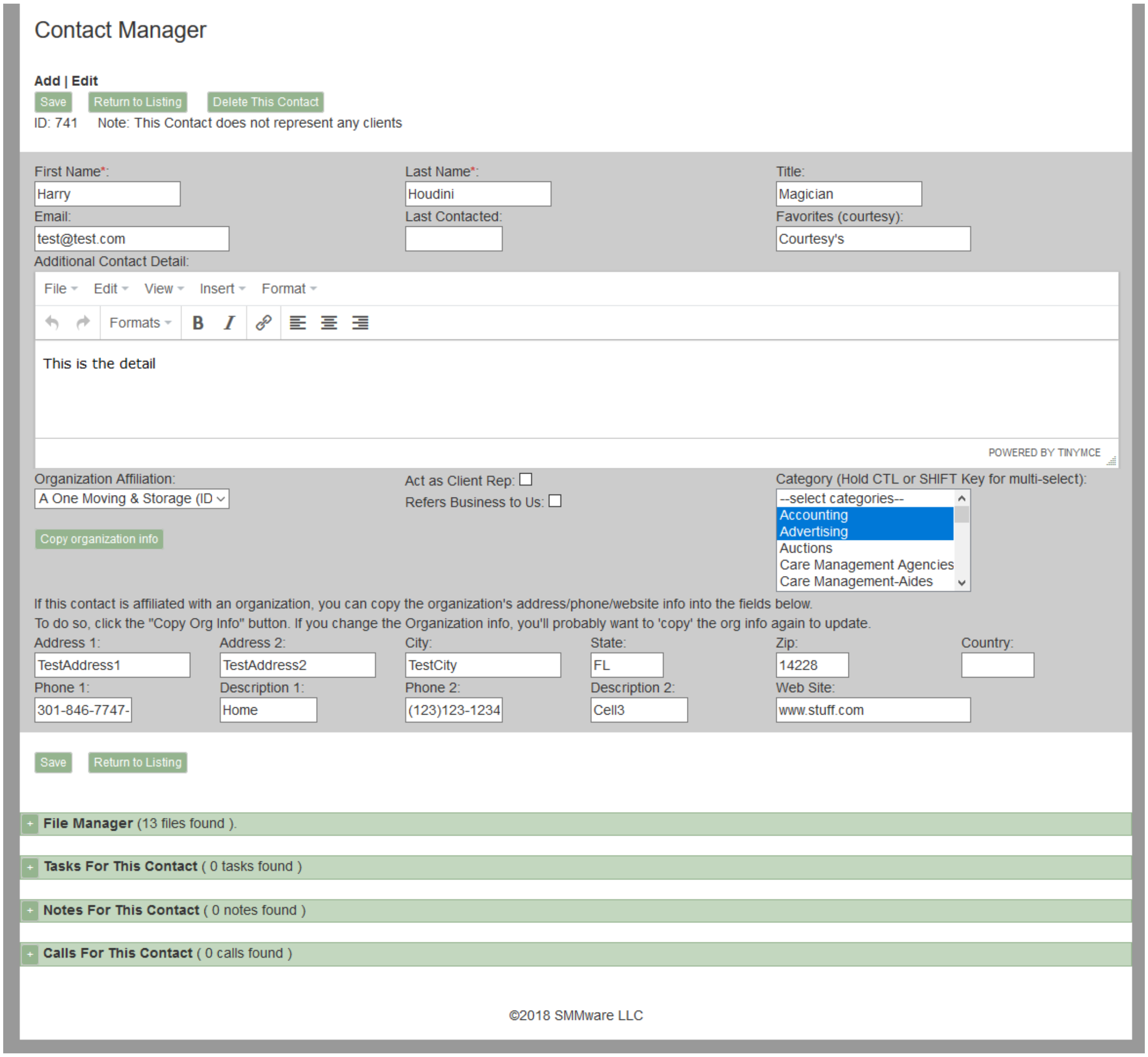
Contacts

YouTube	Watch our YouTube video about the Organization Manager and Contact Manager at https://youtu.be/-uLyIQrYk_0 (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 default view shows the categories which Contacts are assigned to. These are the same categories as are used for Organizations.

Click on the '+' next to the label to expand that category and see individual Contacts.

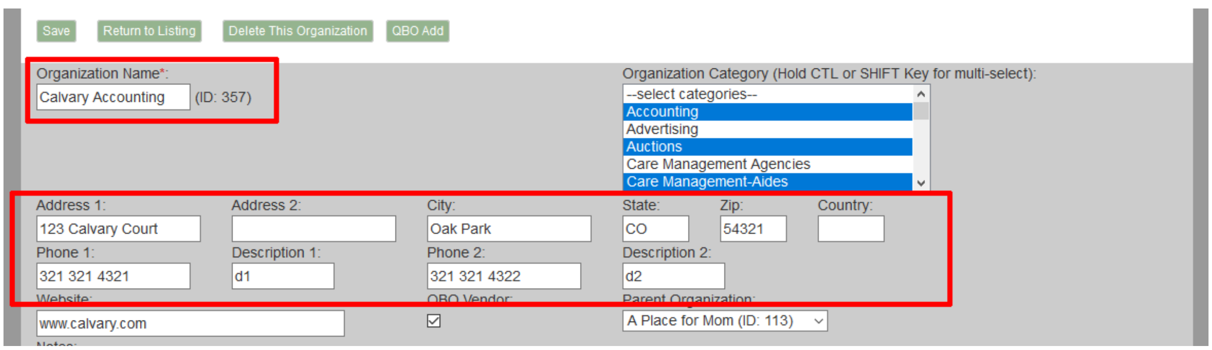
Click on ‘Edit’ to open a profile.



Within a Contact profile, note that a Contact can be assigned to more than one category.

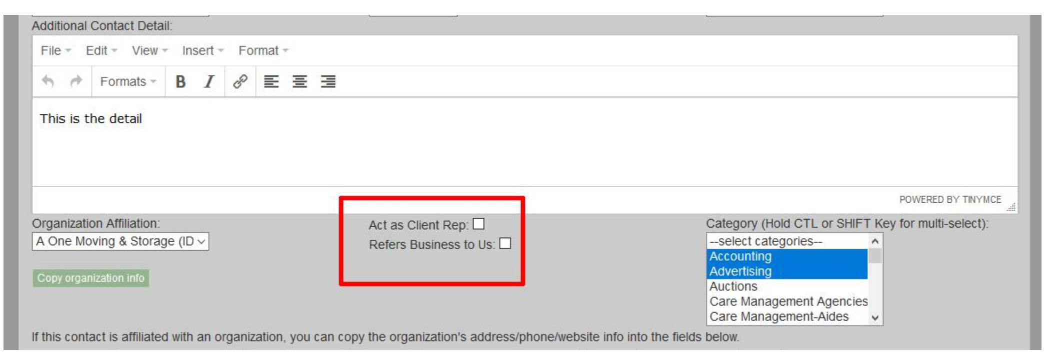
If this contact is a representative for any clients, those clients will be listed in the Contact Profile.

If this Contact is affiliated with an Organization, you can save yourself having to look up the address, telephone, and website info, cutting and pasting it into place. First, select the Organization from the dropdown. Then, click on "Copy organization info" and the fields for address, telephone, and website for this Contact will be filled in using the information from the Organization. This action simply saves you some typing, it does not create any sort of underlying link. You can overwrite this information here without affecting that of the Organization. Just like the other information for this Contact, you need to click 'Save' to store the change permanently to the database.



In a Client profile, there is a dropdown with a list of potential client representatives. Not all Contacts are possible client representatives. So to limit that list of potential client representatives to appropriate people (attorneys yes, plumber probably not), the Contact Profile has a checkbox "Act as Client Rep".

There is also a checkbox "Refers Business to Us". This setting should not be ignored as it plays a part in reminding you to keep in touch with the people who are sources of work.



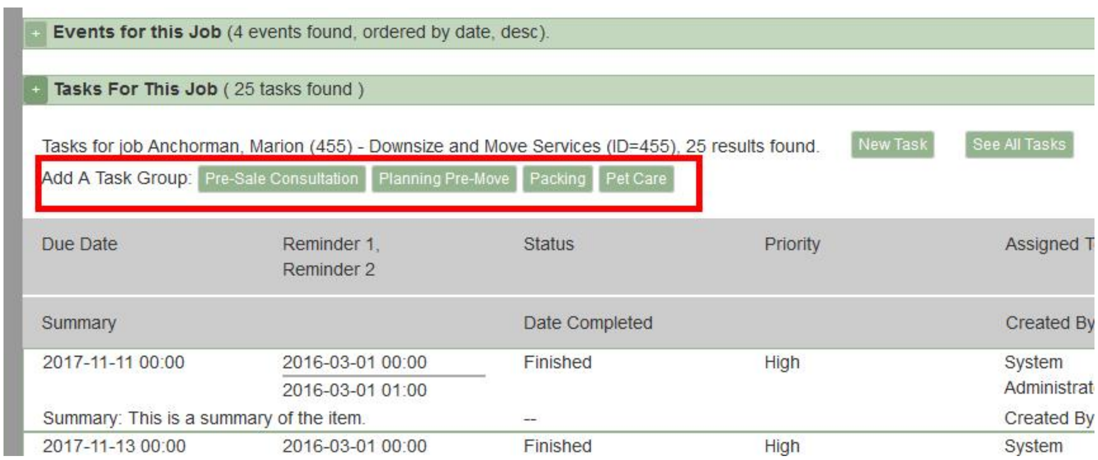
Tasks / Calls / Notes, and Homepage Sections

A Team Lead can edit and delete Tasks/calls created by others, compared to a Basic User who can only view items unless the item was created by them or assigned to them.

	Watch our YouTube video about Tasks, Calls, and Notes at https://youtu.be/3xc5CqwsO5I (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)

Task Groups

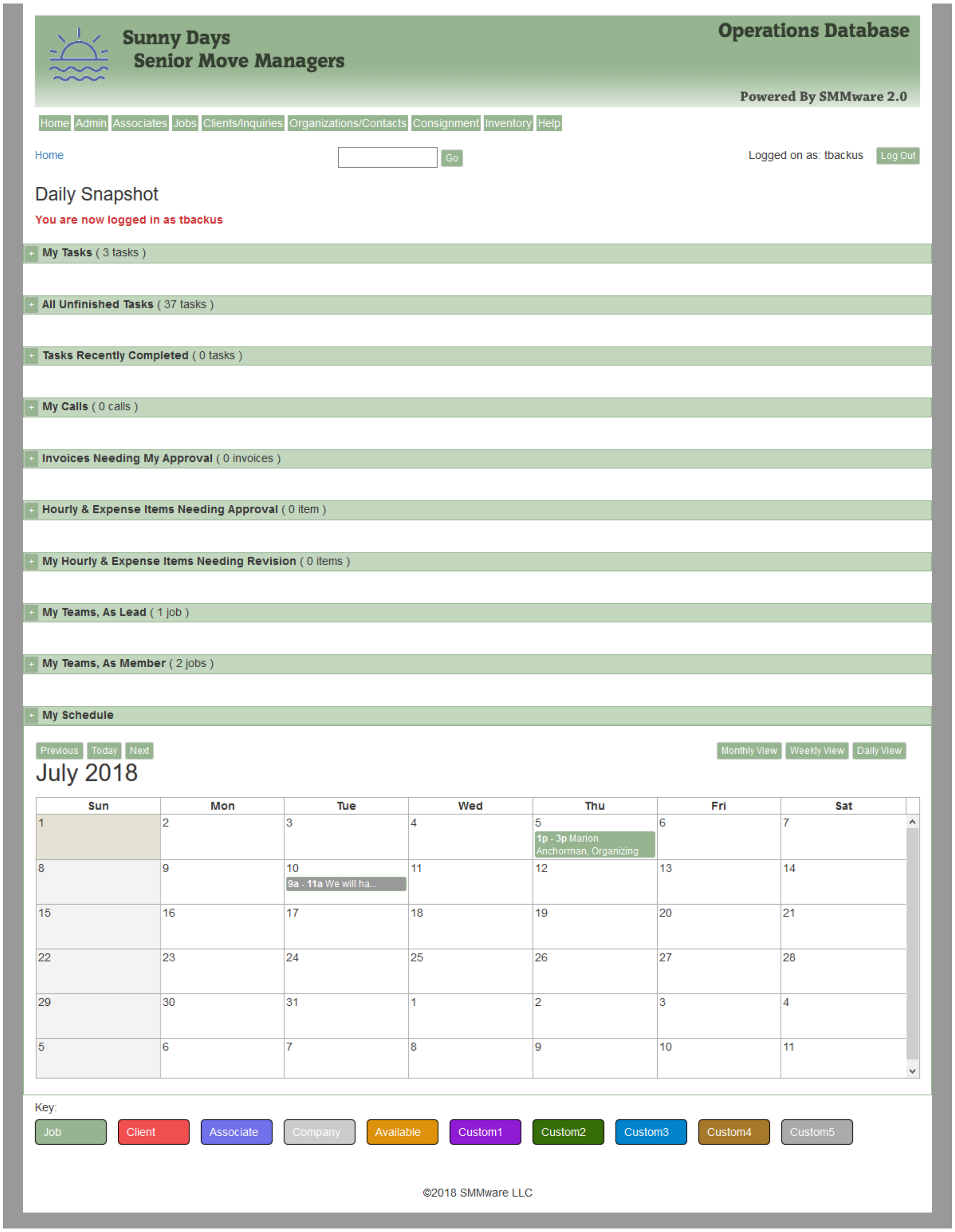
Also, 'Task Groups' provide a quick and easy way to load up a new job with one or more groups of tasks applicable to that job type.



Example: If a client has pets, there may be 4 or 5 tasks that you only need for pets. You can add more than one Task Group.

	Watch our YouTube video about Tasks Groups at https://youtu.be/zxN580JBWeM (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)

Homepage Sections



Below are the new sections available to Team Leads, in addition to the ones for Basic Users.

All Unfinished Tasks

This section is for higher level users like Team Leads to Company Owners. These are people who can be expected to create tasks for others. This list contains all unfinished tasks, regardless of who created them or who they are assigned to.

Tasks Recently Completed

This list contains tasks completed in the last X days, where X is set in the configuration (The default is 5).

Invoices Needing My Approval

If you are the current Team Lead on a job and there is an invoice for that job with Status “Finished”, it will appear here so that you can review and then approve it.

My Teams, As Lead

This is a listing of teams where you are the current Team Lead.

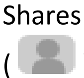
Accounting For Costs Not Related To A Client: Overhead Jobs

If someone spends time doing bookkeeping, you won’t be charging their time to one of your clients. This is also the case if you buy coffee for the office. Time like bookkeeping is considered Administrative Overhead, and the coffee is Materials Overhead. To account for these, SMMware lets you create jobs with ‘job type’ of Administrative Overhead or Materials Overhead. These jobs are created in conjunction with a Client Profile for your company. SMMware offers this approach by default, but doesn’t force you to use them

File Sharing

SMMware allows you to share documents from the File Manager with Clients and Contacts (Client Representatives, Vendors). Which SMMware users can view shares details and which ones can add/edit/delete shares is configurable by contacting SMMware support staff.

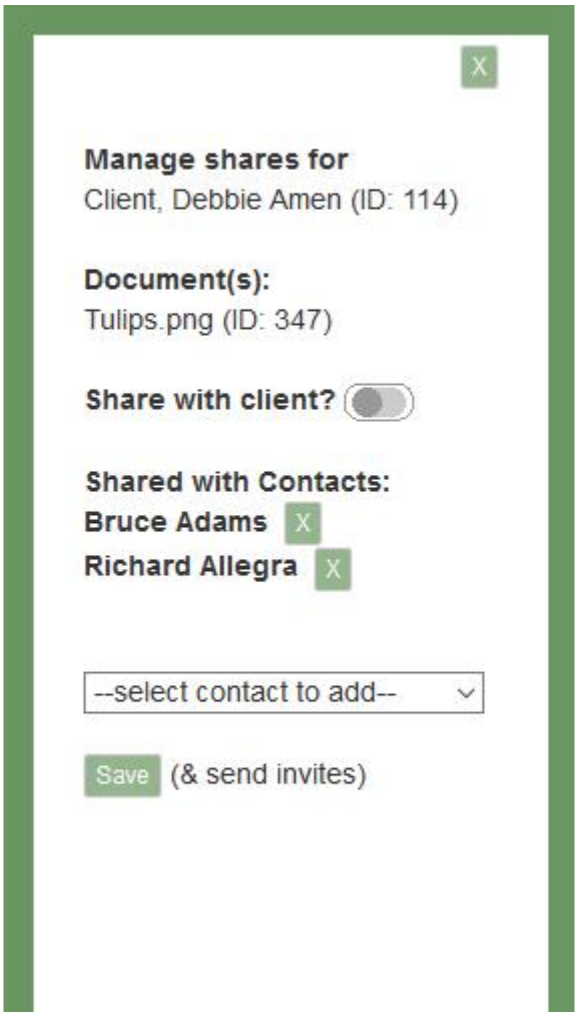
Sharing a Document

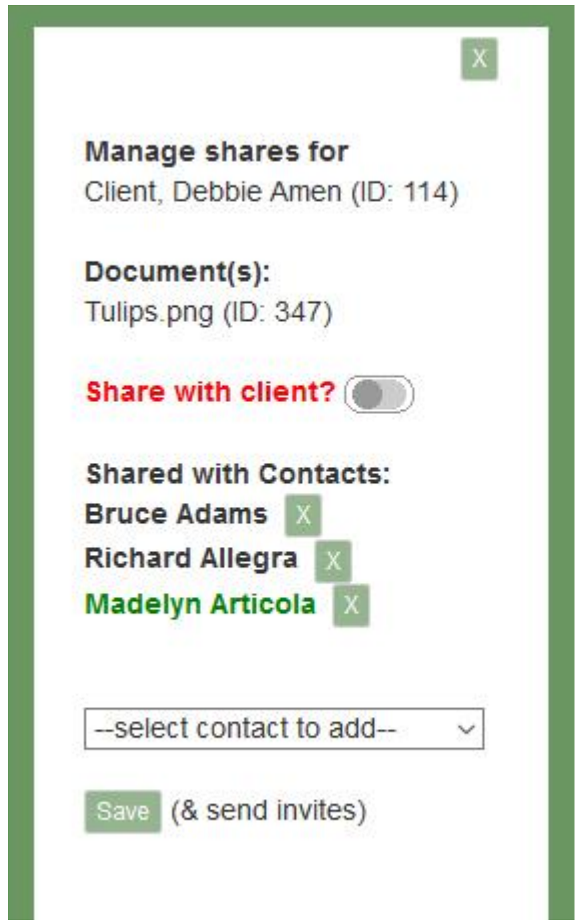
Shares are created from the File Manager in Client and Job Profiles. To start, you click on the ‘share’ icon (). The icon at the top lets you share the whole folder.

Clicking on the share icon brings up the ‘share’ screen.

As seen in the left pane below, you can share the document with the client using the slider. Since SMMware knows who the client is and their email address, you simply need to decide yes/no.

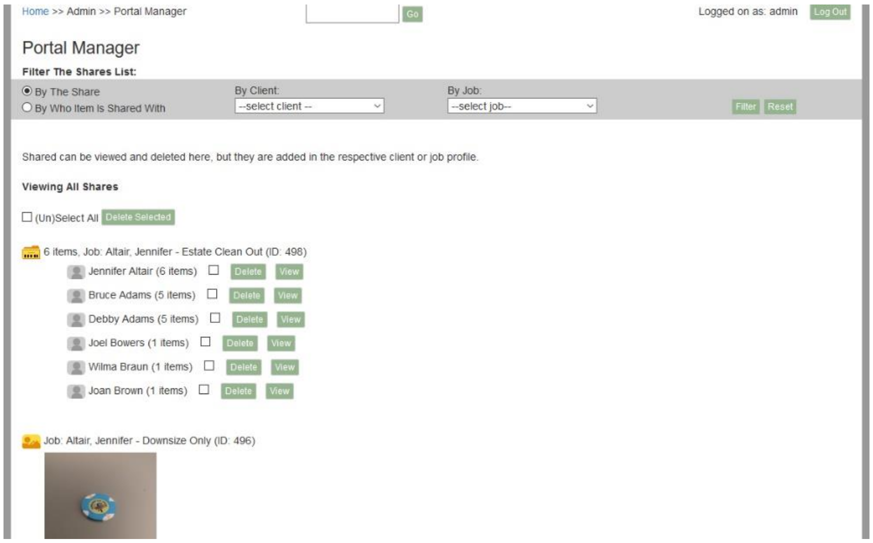
You can add as many Contacts as you like, by selecting them from the Contacts dropdown. When you are about to add someone the text for them is green, and when you are about to delete someone, red. When you hit ‘Save’, the text will all go back to the normal black, and emails are sent to the Portal Users.



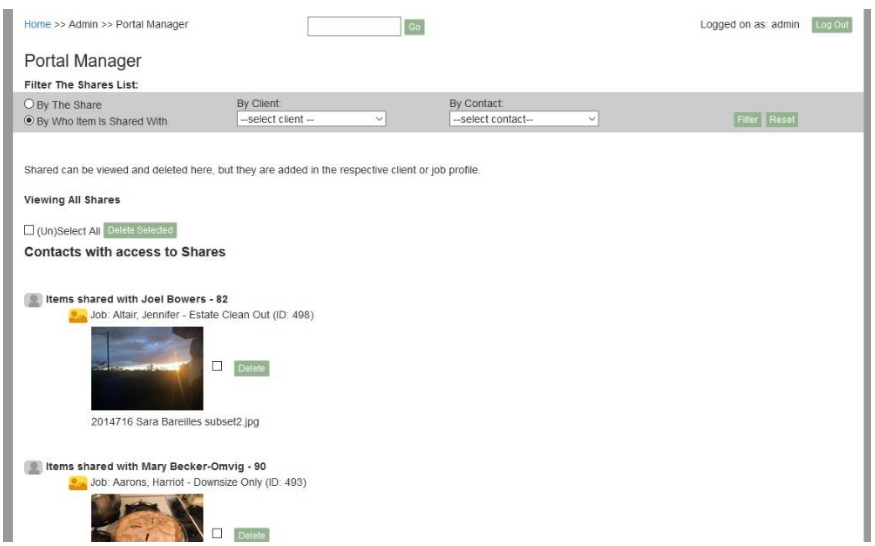


SMMware also provides you with a new command, the Portal Manager, found under Admin->Portal Manager. The filter section at the top in the grey bar allows you to group the listing in two ways.

First, based first on what item is shared and then who has access to it.



Second, grouped by the person with sub-listings of what they have access to.



This command may be useful, for instance, if you stop working with a vendor and want to make sure they no longer have access to any shares.

Shares expire when a job has a job status of ‘closed’.

User Experience, Portal User

When you share an item, the recipient (the Portal User) will receive an email with a link to that share.

If it is their first time, they will be asked to set a password, with their email address serving as their username. A Portal User can only access the page in SMMware for viewing shares that have been set up for them, they are not able to see any other pages in the system.

The Admin menu

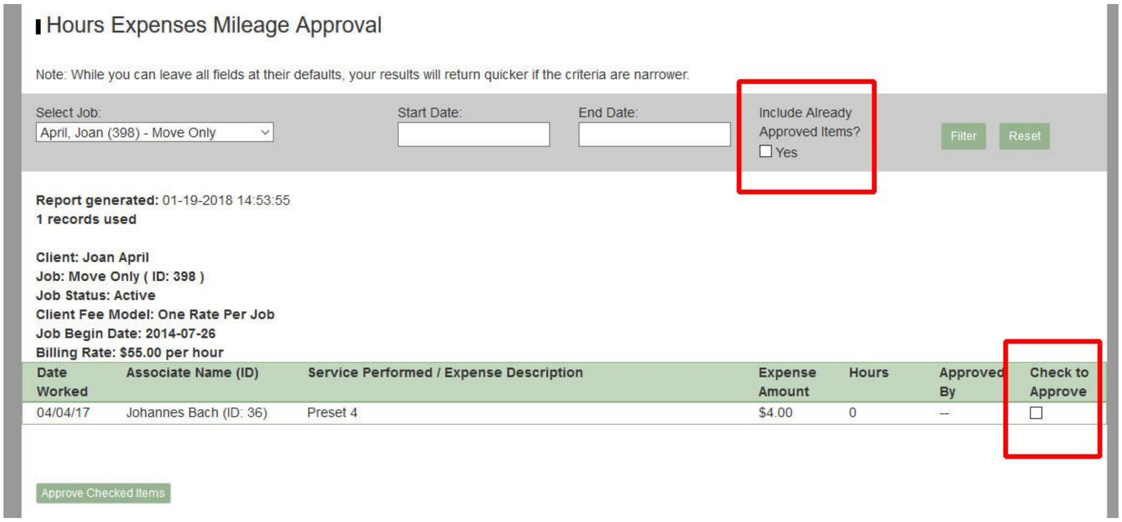
Hours/Expense/Mileage Item Approval

Your site can optionally be configured such that hours/expense/mileage entries must be approved by a team lead before they can be included in an invoice or reimbursed. If this option is inactive, then items would be reviewed within an invoice or reimbursement report.

YouTube	Watch our YouTube video about Hours/Expense/Mileage Item Approval at https://youtu.be/rwNJ7RB20OU (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)

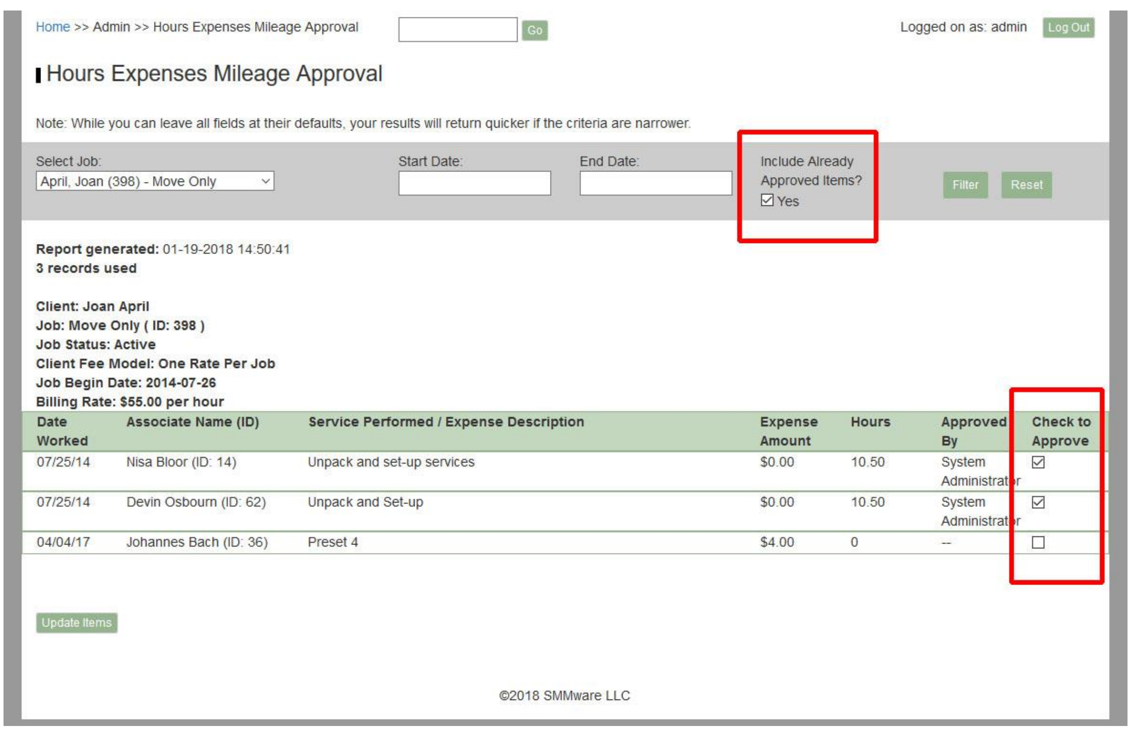
When active, Team Leads (or admins) can approve items by navigating to Admin->Hours Expenses Mileage Approval

They then use the filter to generate a listing of items to review and approve.



By default, the listing is only items which have yet to be approved, and the items disappear from the list as they are approved.

Once an item is approved, it cannot be edited, but you can unapprove an item if it needs to be edited. To unapprove items, check the button "Include Already Approved items".



At this point, approved items can be unchecked. When you click “Update Items” any already approved items are not altered regarding who approved them, you are not taking responsibility for all checked items on the listing, only ones you are just now approving.

When this feature is active, there is an additional child setting, “Strict” or “Cooperative”.

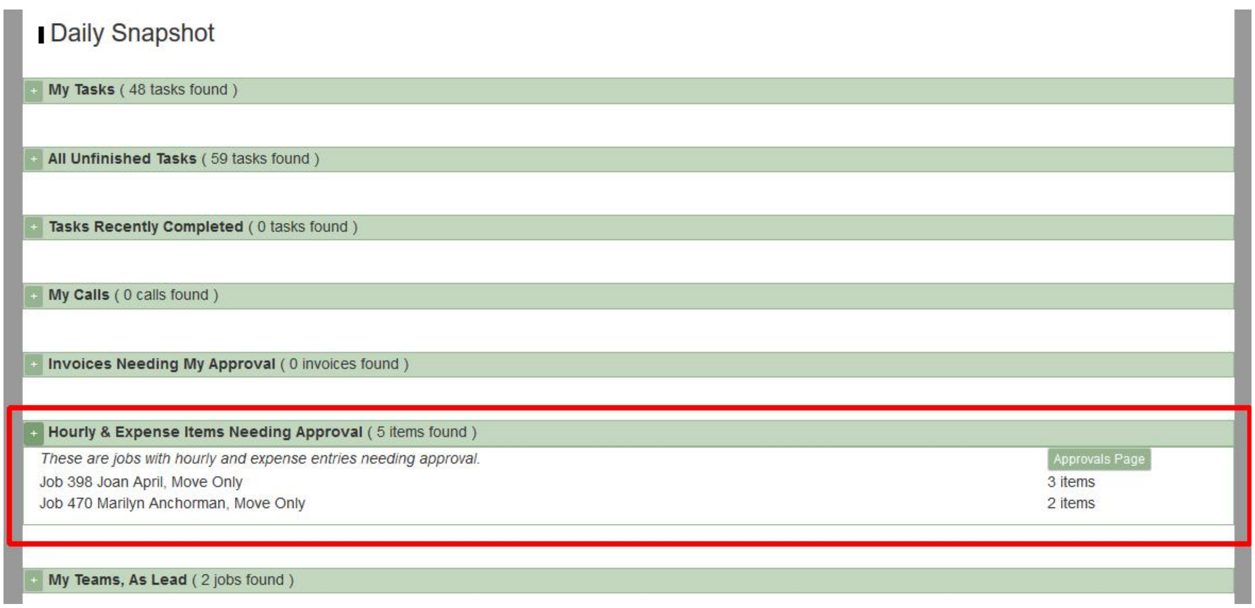
When set to “Strict”, team leads will only see jobs they are team lead for.

When set to “Cooperative”, team leads can approve any item from any job. This is appropriate in an organization that is either smaller or has a higher level of trust. The advantage is that Team Leads can cover for each other.

Under either “Strict” or “Cooperative”, admins can see everything and can cover for an absent Associate. The system still tracks exactly who made the approval (An admin still approves as themselves, as opposed to impersonating the Team Lead).

Note that once an item is part of an invoice, it cannot be unapproved unless it is first removed from the invoice. See the Invoice Manager section below regarding how to release items for corrections.

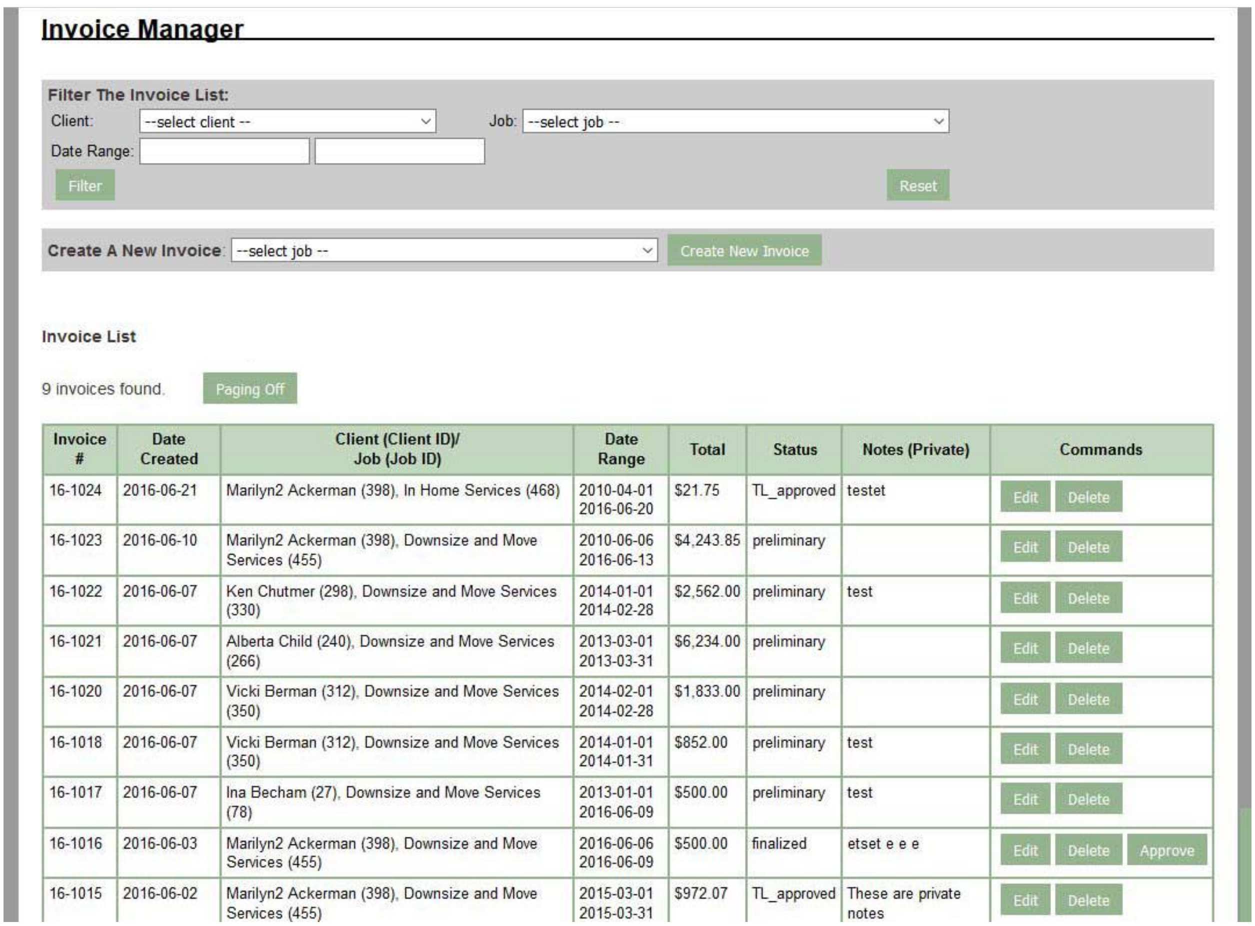
On the homepage (The Daily Snapshot), if this approval feature is active and if you are a Team Lead or Admin, a new section will appear, “Hourly & Expense Items Needing Approval”, which tells you how many items are in the system for you to approve.



Invoice Manager

YouTube	Watch our YouTube video about the Invoice Manager at https://youtu.be/Y4i-mYthAb4 (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)

As Team Lead, your main involvement with Invoices will be to approve one after an Administrator has created it. We'll begin the discussion of the Invoice Manager with the listing screen, shown below.

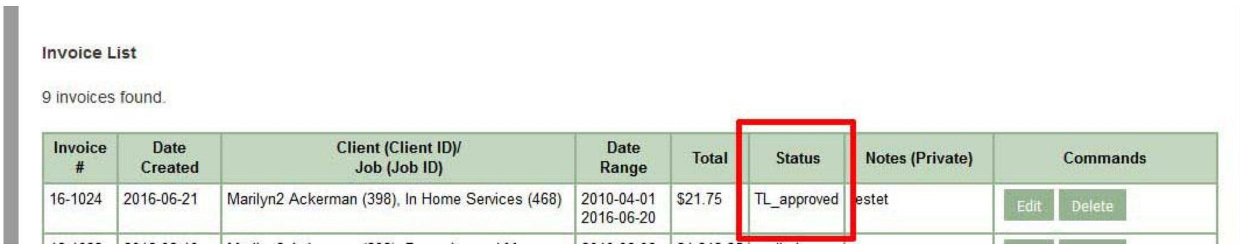


Invoice #	Date Created	Client (Client ID)/ Job (Job ID)	Date Range	Total	Status	Notes (Private)	Commands
16-1024	2016-06-21	Marilyn2 Ackerman (398), In Home Services (468)	2010-04-01 2016-06-20	$21.75	TL_approved	testet	Edit Delete
16-1023	2016-06-10	Marilyn2 Ackerman (398), Downsize and Move Services (455)	2010-06-06 2016-06-13	$4,243.85	preliminary		Edit Delete
16-1022	2016-06-07	Ken Chutmer (298), Downsize and Move Services (330)	2014-01-01 2014-02-28	$2,562.00	preliminary	test	Edit Delete
16-1021	2016-06-07	Alberta Child (240), Downsize and Move Services (266)	2013-03-01 2013-03-31	$6,234.00	preliminary		Edit Delete
16-1020	2016-06-07	Vicki Berman (312), Downsize and Move Services (350)	2014-02-01 2014-02-28	$1,833.00	preliminary		Edit Delete
16-1018	2016-06-07	Vicki Berman (312), Downsize and Move Services (350)	2014-01-01 2014-01-31	$852.00	preliminary	test	Edit Delete
16-1017	2016-06-07	Ina Becham (27), Downsize and Move Services (78)	2013-01-01 2016-06-09	$500.00	preliminary	test	Edit Delete
16-1016	2016-06-03	Marilyn2 Ackerman (398), Downsize and Move Services (455)	2016-06-06 2016-06-09	$500.00	finalized	etset e e e	Edit Delete Approve
16-1015	2016-06-02	Marilyn2 Ackerman (398), Downsize and Move Services (455)	2015-03-01 2015-03-31	$972.07	TL_approved	These are private notes	Edit Delete

At the top of the screen is a filters section. Normally, all invoices that have been entered in the system are selected, although you will only see one page/screen's worth at a time. You can set the 'client' and 'job' dropdowns as well as a date range in order to limit the invoices selected.

The filters section:

The screenshot below shows a typical line item from the listing screen, for a single invoice. The red highlighting shows a status of TL_approved, short for "Team Leader Approved".



Invoice #	Date Created	Client (Client ID)/ Job (Job ID)	Date Range	Total	Status	Notes (Private)	Commands
16-1024	2016-06-21	Marilyn2 Ackerman (398), In Home Services (468)	2010-04-01 2016-06-20	$21.75	TL_approved	estet	Edit Delete

The invoicing system includes an approval process to help make sure that the client receives an accurate invoice.

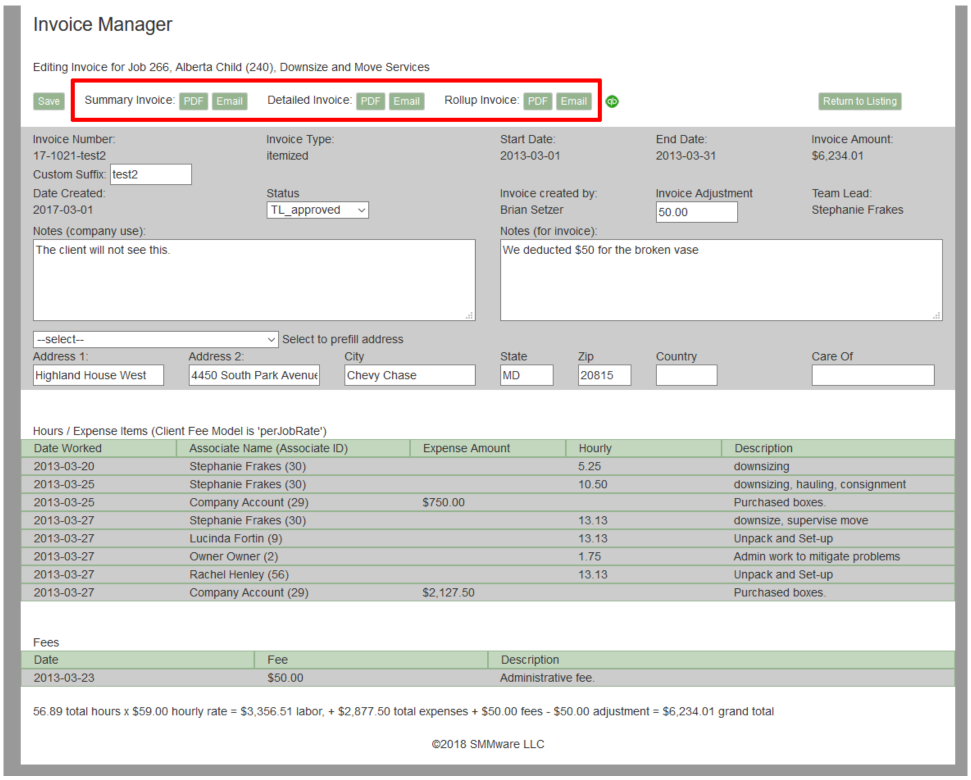
When an invoice is first created, it will have a status of "Preliminary". This is a working copy, and is not yet ready for you as the Team Leader to approve. Once they, the invoice creator, are satisfied that the invoice is complete, they will change the status to "Finalized" so that you (as the Team Leader) can approve it.

When an invoice has a status of "Finalized" it's line item on the Listing Screen will include the Approve button. The button appears for you only if you are the relevant Team Leader. To handle unforeseen circumstances (Sometimes the Team Leader is unavailable for approval but an Administrative level user is confident that it is correct) the Approve button also appears for Administrative Users.

16-1018	2016-06-07	Vicki Berman (312), Downsize and Move Services (350)	2014-01-01 2014-01-31	$852.00	preliminary	test	Edit Delete
16-1017	2016-06-07	Ina Becham (27), Downsize and Move Services (78)	2013-01-01 2016-06-09	$500.00	preliminary	test	Edit Delete
16-1016	2016-06-03	Marilyn2 Ackerman (398), Downsize and Move Services (455)	2016-06-06 2016-06-09	$500.00	finalized	etset e e e	Edit Delete Approve
16-1015	2016-06-02	Marilyn2 Ackerman (398), Downsize and Move Services (455)	2015-03-01 2015-03-31	$972.07	TL_approved	These are private notes	Edit Delete

Once the invoice has been approved, it will have a status of "TL_approved". At this point, the detail view for that invoice will include the "PDF" and "Email" buttons for the available formats (Summary, Detail, Rollup). Clicking on these generates PDF's of the invoice which are suitable for sending to the client.

The summary format includes only one line item for each category of billing (one for hours, one for expense, one for mileage). The detail format includes a line item for every Associate on a given day, so there are typically multiple entries per date. The rollup format combines all the entries for a given date into one line.



Invoice Manager

Editing Invoice for Job 266, Alberta Child (240), Downsize and Move Services

Save | Summary Invoice: PDF Email | Detailed Invoice: PDF Email | Rollup Invoice: PDF Email | Return to Listing

Invoice Number: 17-1021-test2 | Invoice Type: itemized | Start Date: 2013-03-01 | End Date: 2013-03-31 | Invoice Amount: $6,234.01

Custom Suffix: test2

Date Created: 2017-03-01 | Status: TL_approved | Invoice created by: Brian Setzer | Invoice Adjustment: 50.00 | Team Lead: Stephanie Frakes

Notes (company use): The client will not see this.

Notes (for invoice): We deducted $50 for the broken vase

--select-- Select to prefill address

Address 1: Highland House West | Address 2: 4450 South Park Avenue | City: Chevy Chase | State: MD | Zip: 20815 | Country: | Care Of:

Hours / Expense Items (Client Fee Model is 'perJobRate')

Date Worked	Associate Name (Associate ID)	Expense Amount	Hourly	Description
2013-03-20	Stephanie Frakes (30)		5.25	downsizing
2013-03-25	Stephanie Frakes (30)		10.50	downsizing, hauling, consignment
2013-03-25	Company Account (29)	$750.00		Purchased boxes.
2013-03-27	Stephanie Frakes (30)		13.13	downsize, supervise move
2013-03-27	Lucinda Fortin (9)		13.13	Unpack and Set-up
2013-03-27	Owner Owner (2)		1.75	Admin work to mitigate problems
2013-03-27	Rachel Henley (56)		13.13	Unpack and Set-up
2013-03-27	Company Account (29)	$2,127.50		Purchased boxes.

Fees

Date	Fee	Description
2013-03-23	$50.00	Administrative fee.

56.89 total hours x $59.00 hourly rate = $3,356.51 labor, + $2,877.50 total expenses + $50.00 fees - $50.00 adjustment = $6,234.01 grand total

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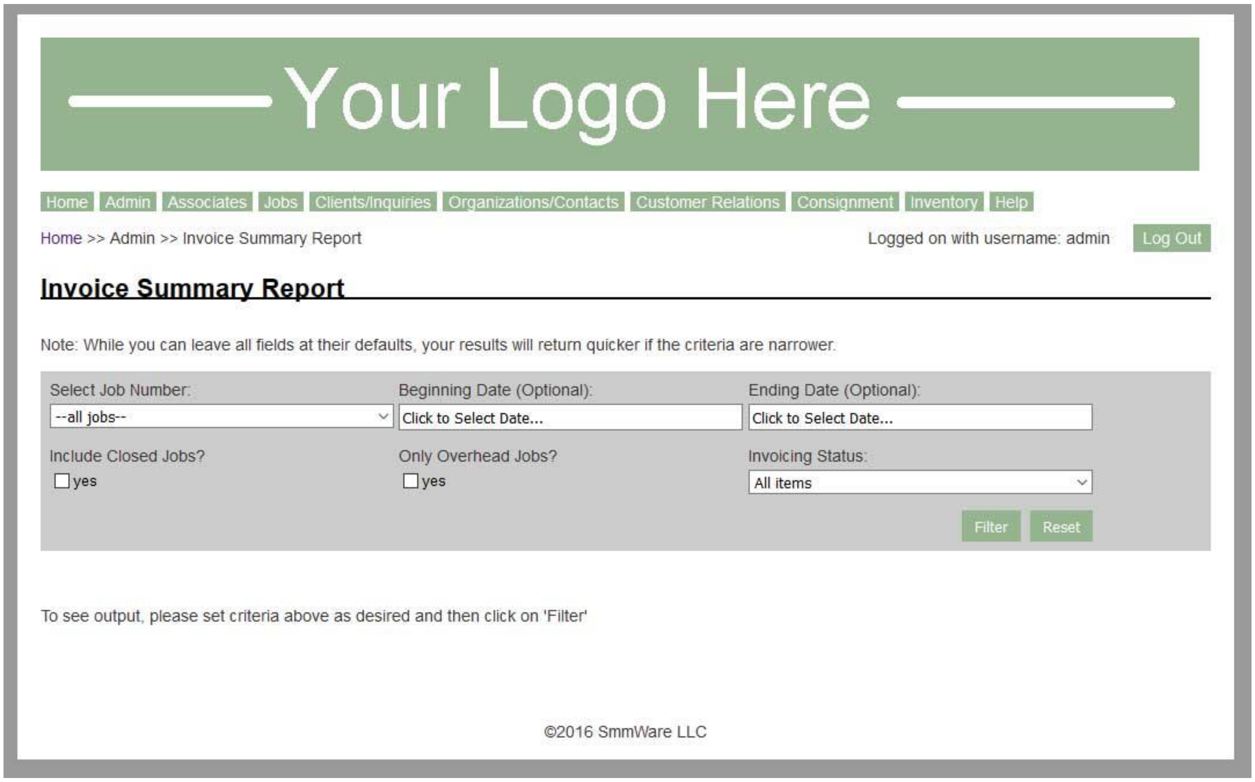
Invoice Summary Report

The Invoice Summary is not another way to create invoices, but it does play a role in the invoice process. This command can help you verify that all Hours/Expense items have been accounted for.



The Invoicing Status dropdown can be set to “All Items”, “Only Invoiced Items”, or “Only Uninvoiced Items”. Use this in combination with the job and/or Date Range filters to shape the results.

Invoice Summary Report

Note: While you can leave all fields at their defaults, your results will return quicker if the criteria are narrower.

Select Job Number:	Beginning Date (Optional):	Ending Date (Optional):
Meeks, Maria Victoria (463) - Downsize and Mov	Click to Select Date...	Click to Select Date...
Include Closed Jobs?	Only Overhead Jobs?	Invoicing Status:
☐ yes	☐ yes	All items

Filter Reset

Report generated: 10-19-2016 15:57:15
2 records used

Client: Maria Victoria Meeks C Mohr
Job Number: (463)
Job Status: Active
Job Type: Downsize and Move Services
Job Begin Date: 2015-04-27
Billing Rate: $59.00 per hour
Team Lead: Kathryn Levato (34)

Date Worked	Associate Name (Associate ID)	Expense Amount	Hours	Invoice Status	Service Performed / Expense Description
April 28, 2015	Kathryn Levato (ID: 34)		3.50	Uninvoiced	Reviewed and tagged pictures and furniture for sale, donation, Nina, Chris, storage. Set up master list of areas to downsize. Downsized hall closet. Reviewed sample floor plan and discussed options with Lynn, space planner.
April 29, 2015	Kathryn Levato (ID: 34)		5.25	Uninvoiced	* Downsizing the knicknacks and books from dining room shelves and bedroom bookcase. * Downsized the upper cabinets of the kitchen. * Sent pics to Nina of items your mom thought you may be interested in. *Set up a pile of books and photo memorabilia for C
	Total labor and expenses for job number 463	**$0.00**	**8.75**		**8.75 Hrs. X $59.00 = $516.25**
				INVOICE TOTAL	**$516.25**

REPORT TOTAL JOBS IN REPORT: 1
REPORT TOTAL MILES: 0
REPORT TOTAL EXPENSES: $0.00
REPORT TOTAL HOURS: 8.75
REPORT TOTAL ADJUSTMENTS: $0.00
REPORT INVOICE TOTAL: $516.25

Master Calendar

Click to Admin->Master Calendar. SMMware allows a company to schedule events in a flexible way.

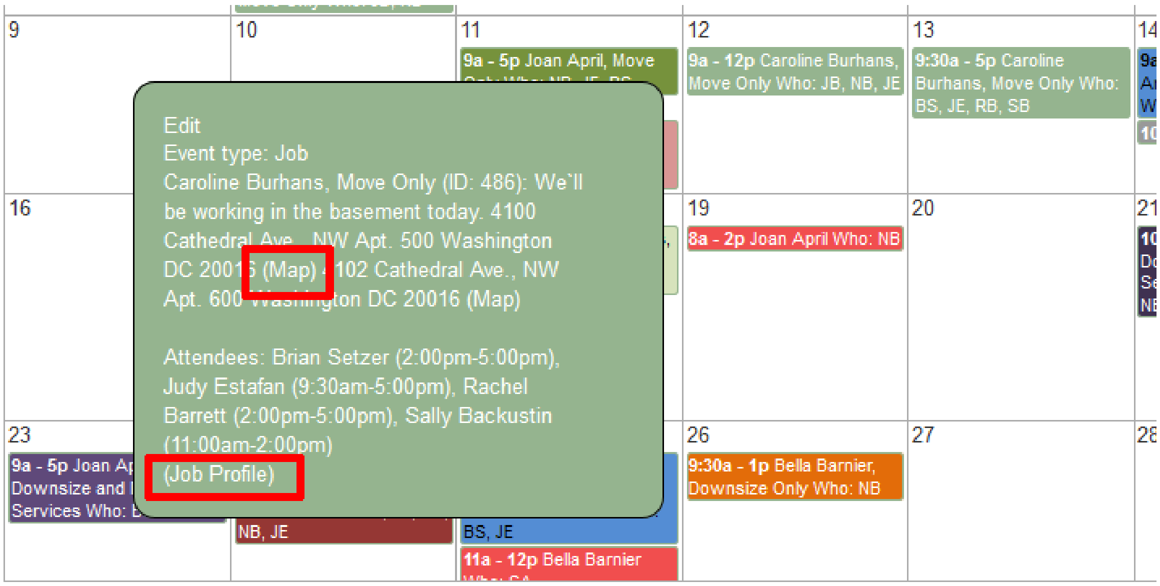
YouTube	Watch our YouTube video about Schedules and Calendars at https://youtu.be/vEGHnUDbWDk (if this link is broken because we've posted a new version, go to our channel at https://www.youtube.com/SMMware to get to the new video)

We will first discuss the calendar and then how to manage the events on it.

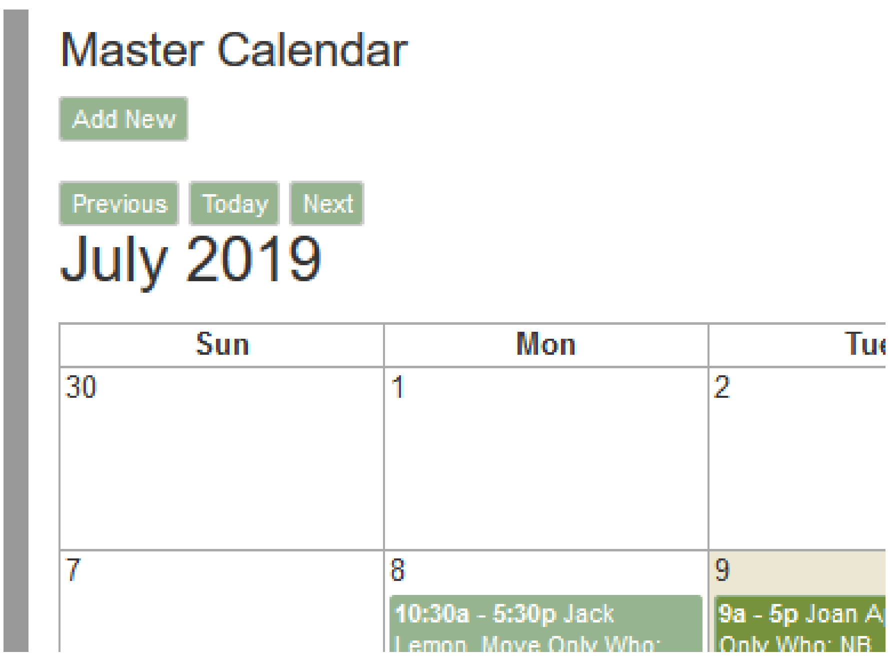
Note, jobs and events are separate concepts, and a job can require zero events or multiple events. For instance, when you meet at the client's original address to pack, that is an event (with a specific time and place). A couple days later when you meet a the client's new address to unpack, that is another event for the same job. The system does not automatically add events to the calendar when a job is created because the system does not know the details of time and place, or which Associates should attend.

The different types of events are color coded, with a key at the bottom of the page.

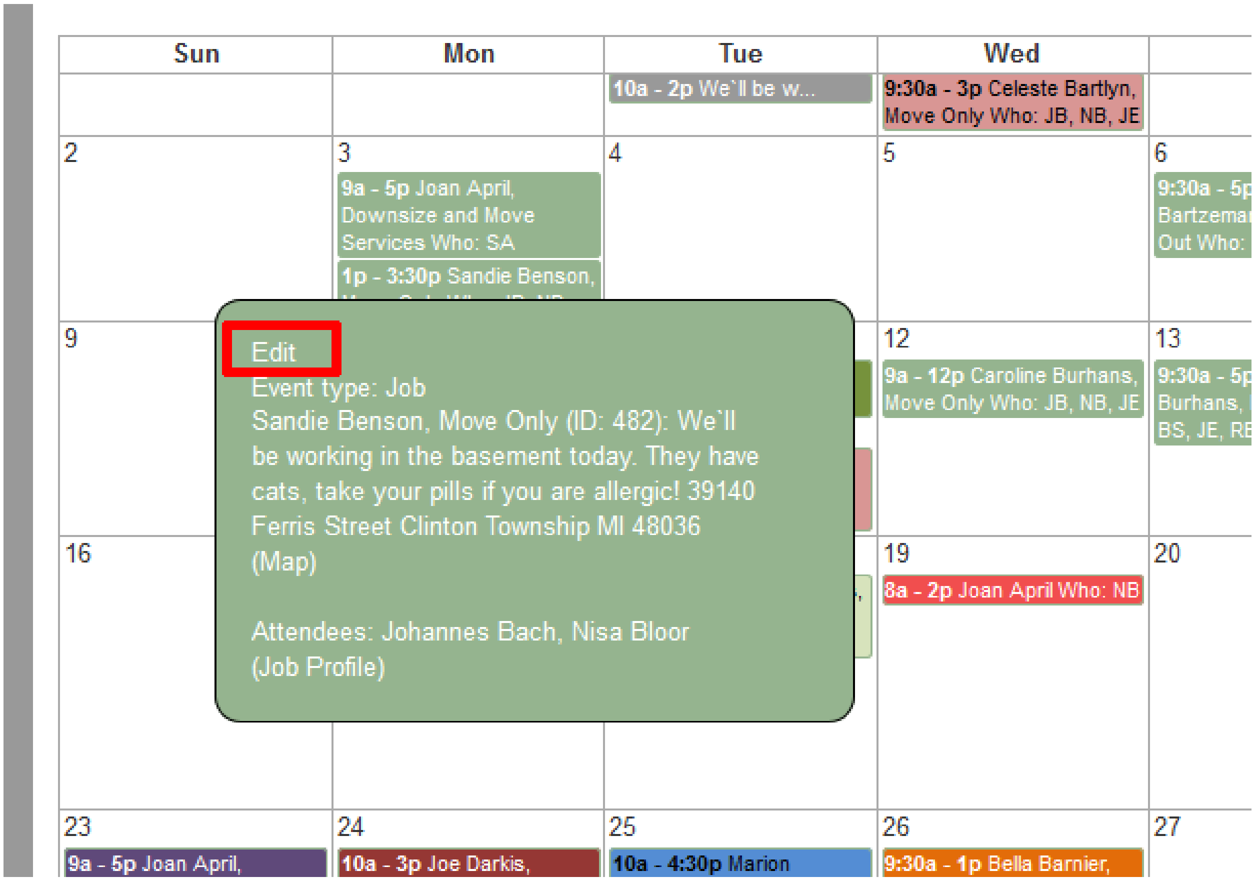
An event is shown with an abbreviated description. It also has a section starting with 'Who' followed by the initials of the Associates involved. When the item is clicked on, a popup appears showing the full details from the description field, a link to a map, a link to the Job Profile (if applicable), and a list of attendees (with their shift times, if applicable). The user can then click on the popup to close it.



Assuming you have sufficient permissions, to add a new event click on the "Add New" button which appears on the left above the master calendar (Admin->Calendar).

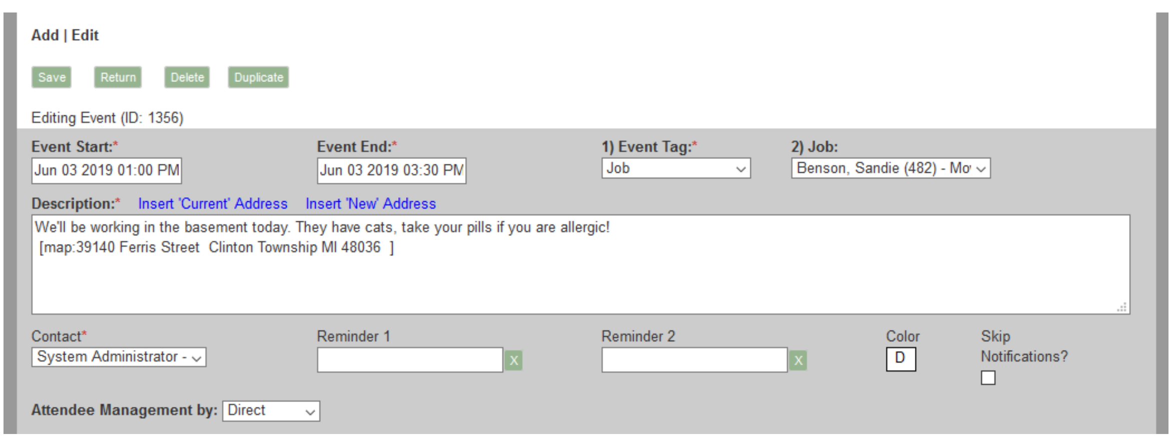


You can edit an existing event using the "Edit" button that appears in the event details popup at the top left. You must have sufficient permissions for this button to appear.



The “Event Tag” dropdown can be left at default. But if you set it to “Job” and then indicate which job, that allows the event to insert the ‘map shortcode’ for the current and new addresses (which become the map links in the Master Calendar view). The event will then also appear in the Job’s “Event Listing” section.

Emails sent to the associates tell them who to talk to about questions. The “Contact” dropdown determines whose contact information will appear in those emails. Also, the system sends update email to the Contact. You can set the contact to be someone other than yourself.



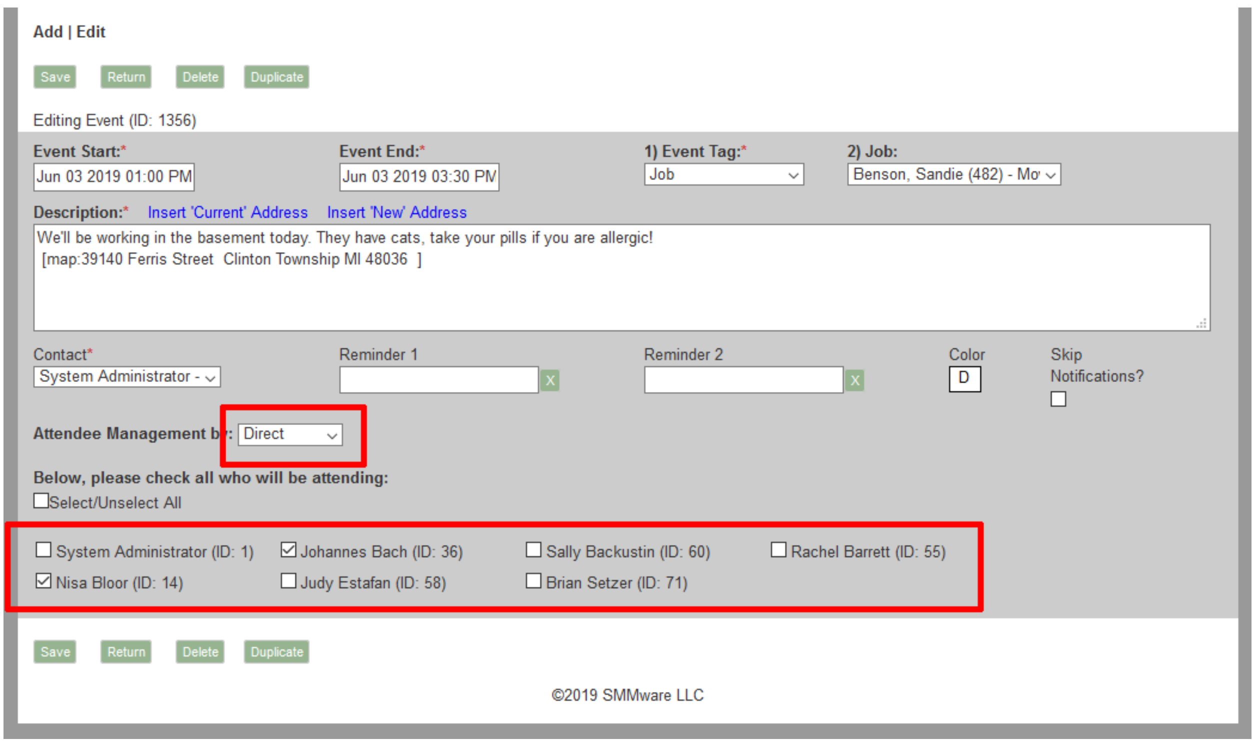
Event Details, for New and Edited Events

There are three common real world situations which SMMware looks to address. The first is when an event owner already knows exactly who should attend an event (Direct). The second is when the event owner wants to let associates express their interest in attending (Invite). These first two assume that you have already agreed with the client on the date to work.

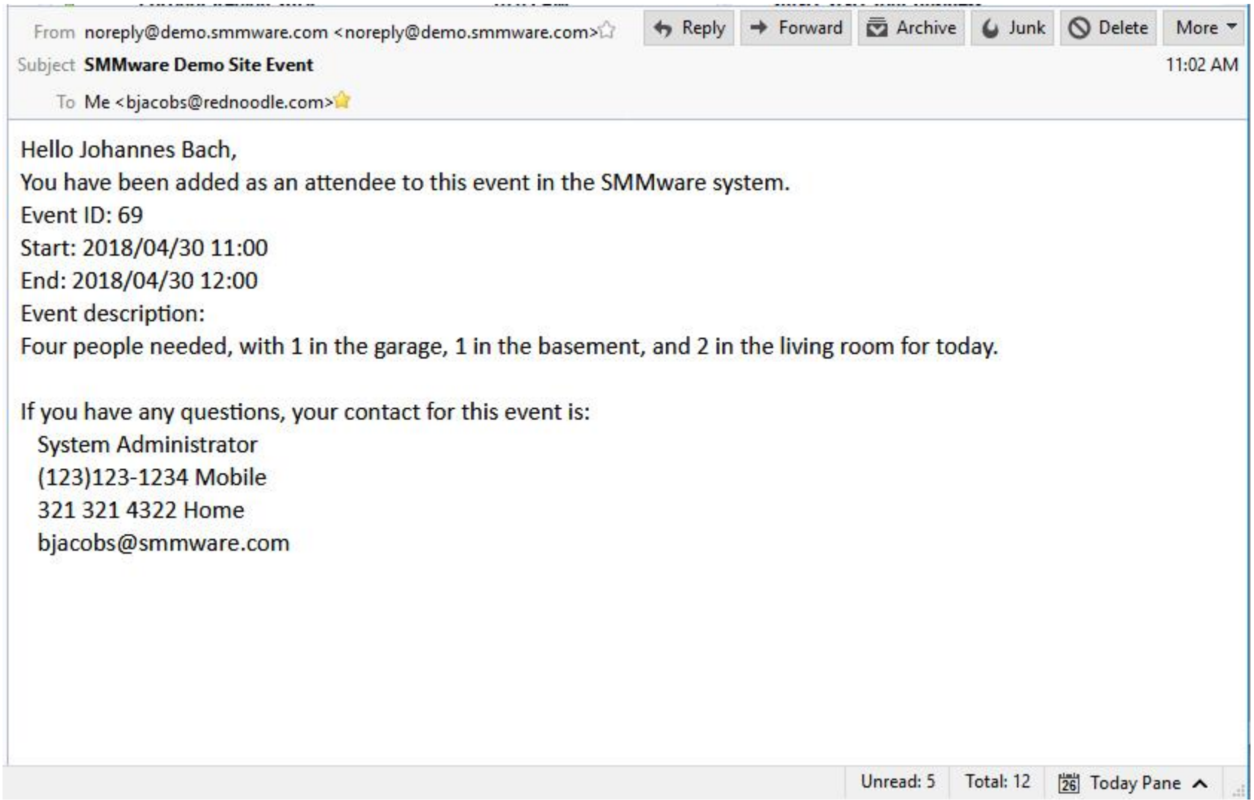
The third approach has associates enter their availability or unavailability into the system, with you then sitting down with the client and negotiating the work date based on when you have staff to do the work (Availability).

Direct

Within SMMware, the first approach is called “direct” adding of attendees. When the event owner creates the event and choose the direct add type, they see a list of associates and click on the checkbox per associate to attend.



Attendees will receive emails informing them of their assignment. Any revisions to start and end dates or event details will cause emails to be sent to all attendees. If the event definition stays the same, any changes in attendees results in emails to just those affected. Anyone added or removed receives emails.



From noreply@demo.smmware.com <noreply@demo.smmware.com>

Reply Forward Archive Junk Delete More

Subject **SMMware Demo Site Event**

11:02 AM

To Me <bjacobs@rednoodle.com>

Hello Johannes Bach,
You have been added as an attendee to this event in the SMMware system.
Event ID: 69
Start: 2018/04/30 11:00
End: 2018/04/30 12:00
Event description:
Four people needed, with 1 in the garage, 1 in the basement, and 2 in the living room for today.

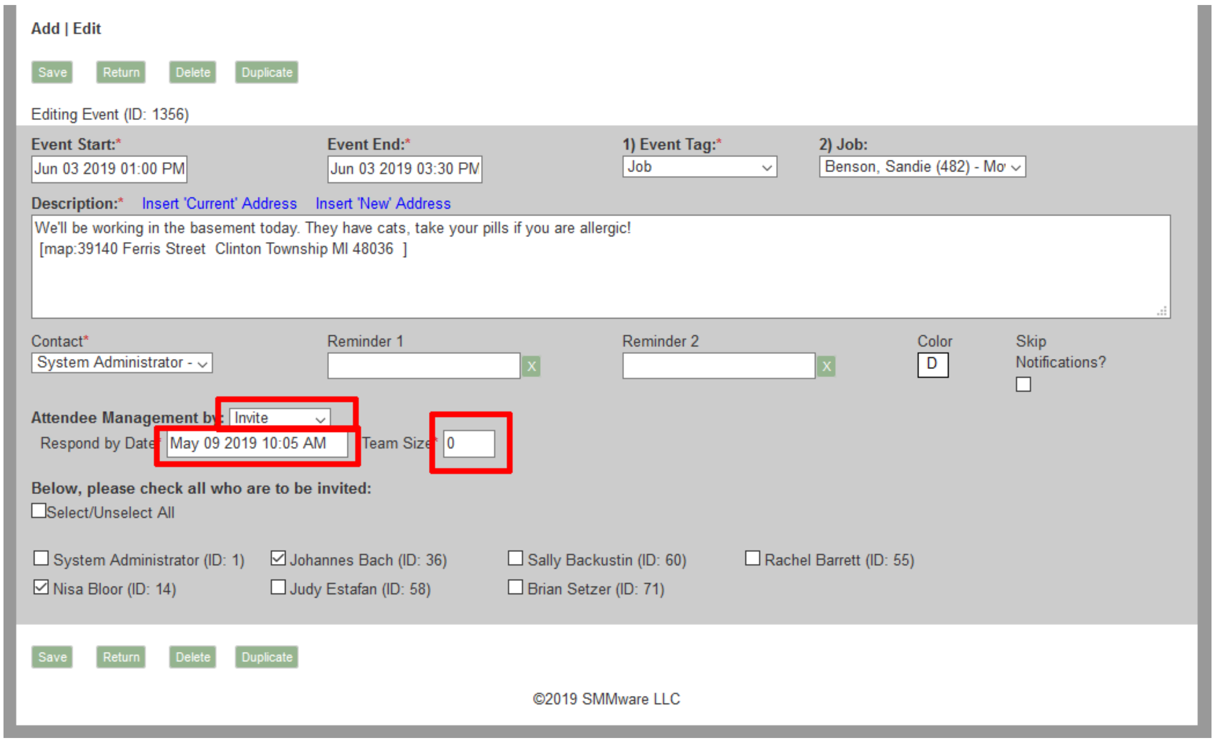
If you have any questions, your contact for this event is:
System Administrator
(123)123-1234 Mobile
321 321 4322 Home
bjacobs@smmware.com

Unread: 5 Total: 12 Today Pane

Invite

The second approach is called “invite”. After the event is created, associates receive an invitation via email. They click on the embedded ‘yes’ or ‘no’ links, opening a webpage telling SMMware they are interested, or not.

In the setup screen below, you first change the Direct/Invite dropdown to Invite. Then you set a respond by date and a team size.

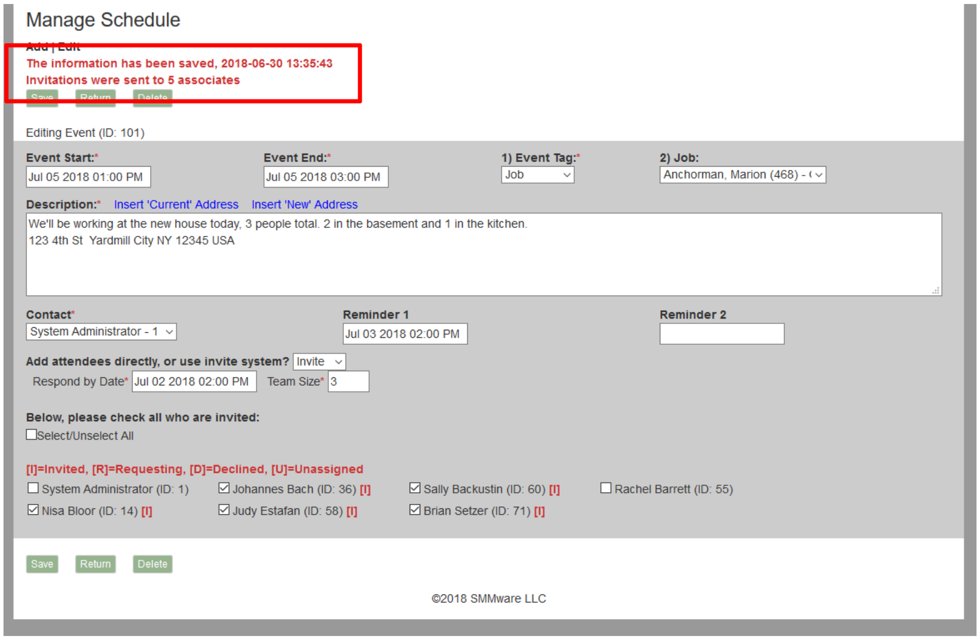


The Respond By date is included in the email to invitees and is just a notification of when you anticipate making the decision, nothing in the system is concretely tied to it. The system won’t force you to make assignments on that date, nor stop you from deciding ahead of time.

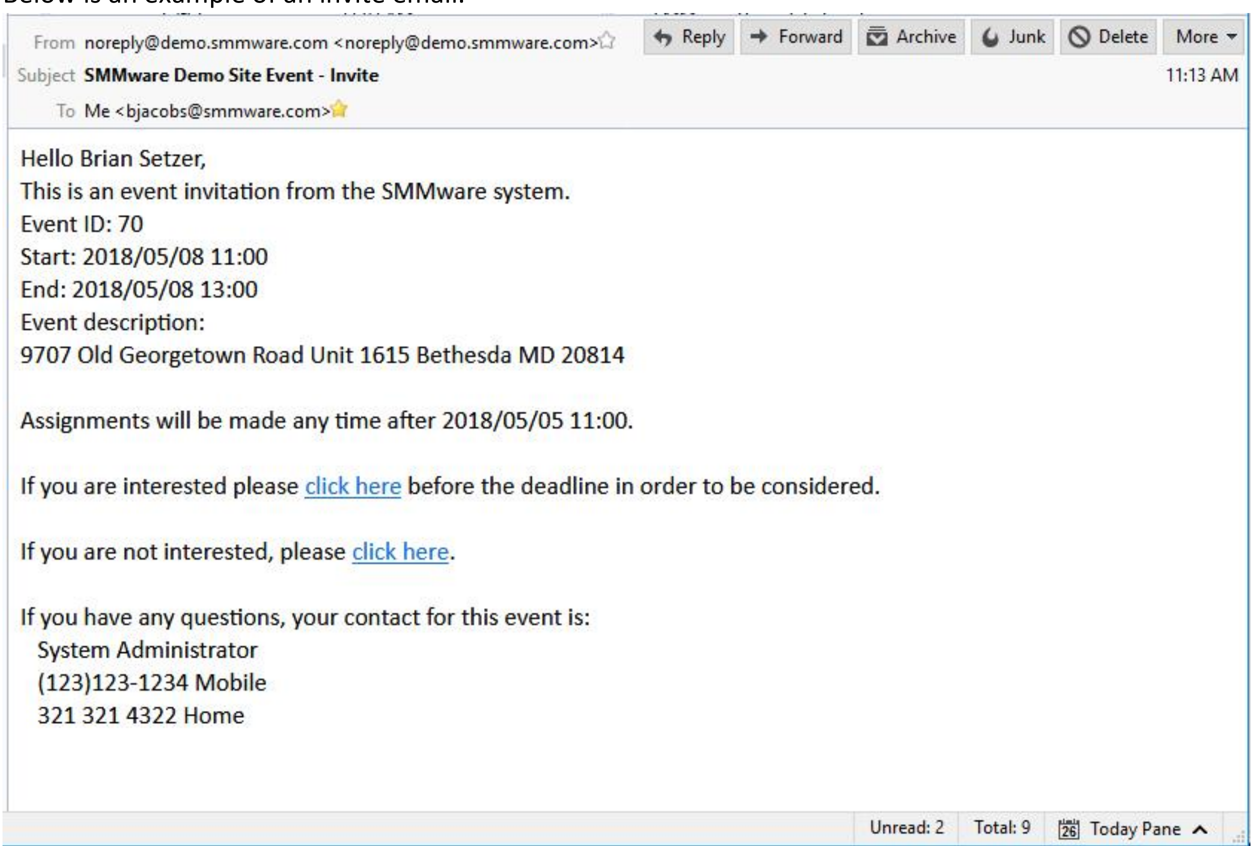
The Team Size text field lets you fill the team in a first come, first served approach. After the number of people interested equals the Team Size, any further requests to join the team will be denied. If you do not intend to fill your team this way, just be sure to enter a Team Size that is larger than the number of associates so that nobody will be denied (the Team Size is not shared with the associates so there won’t be any confusion/questions about why the Team Size is …100).

You don’t have to invite everyone in the company to your event, you can use the checkboxes to indicate who to invite.

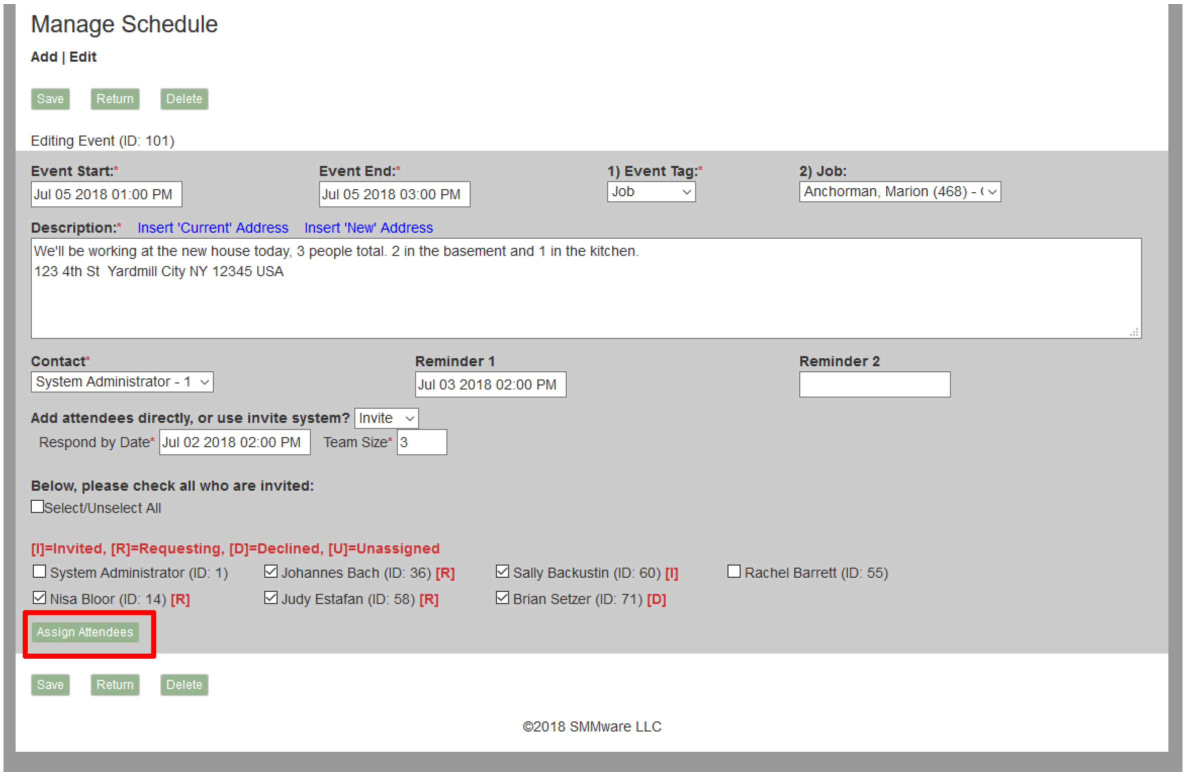
The completion screen lets you know how many invite emails went out.



Below is an example of an invite email.



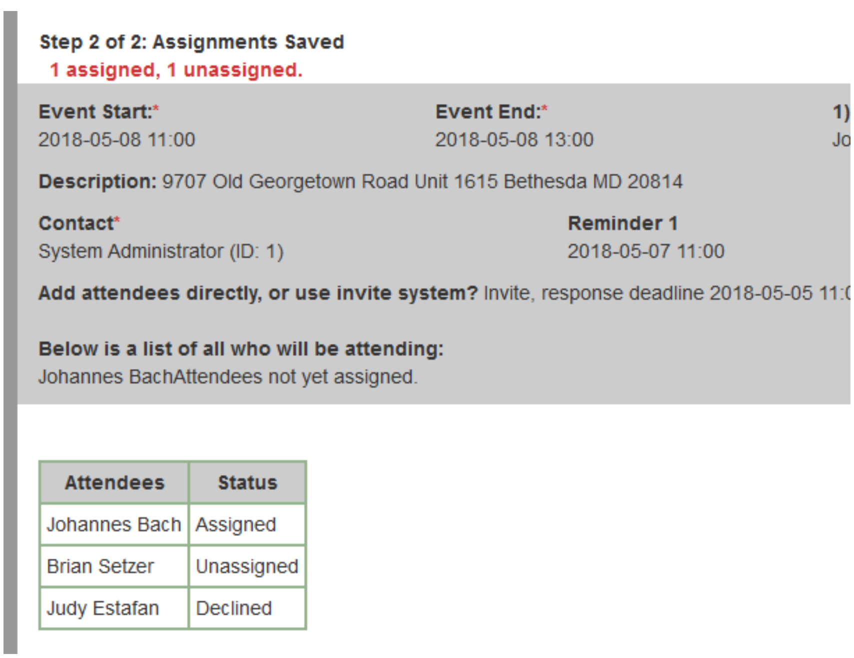
Assuming that more people are interested than are needed, the event creator can then make the final assignment out of who expressed interest. They use the button "Assign Attendees" as shown below.



When the event is initially created, the event owner indicates the date on which they intend to make the decision, to motivate responses. Note that the system does not force the event creator to decide at that exact time, the system allows them to decide later or sooner than that date.

The assignment screen lists everyone who responded, when they responded, and whether they are interested or not. The interested people are listed by response date. So if you wish to assign associates on a first come first serve basis, you can simply start at the top of the list and work downwards as needed.

The second screen confirms the final status of each respondee.



Here is one more approach supported by SMMware. During initial invitations, you also have the option of using multiple rounds of invitations. Suppose you have three people in mind as your first choice for an event and invite them, and one responds that they can't make it (So they have a 'D' for 'Declined' next to their name in the edit screen). You can check the box for someone else and hit save. The new invitee will get an invitation email, and you can proceed.

SMMware recognizes that circumstances change. After the event owner has assigned a team, they can still modify the attendee list by checking or unchecking associates from the list (and saving the changes). If someone had responded "Requesting", there will be an [R] next to their name, and if they declined there will be a [D]. This may be helpful in deciding on new attendees for changes.

Availability

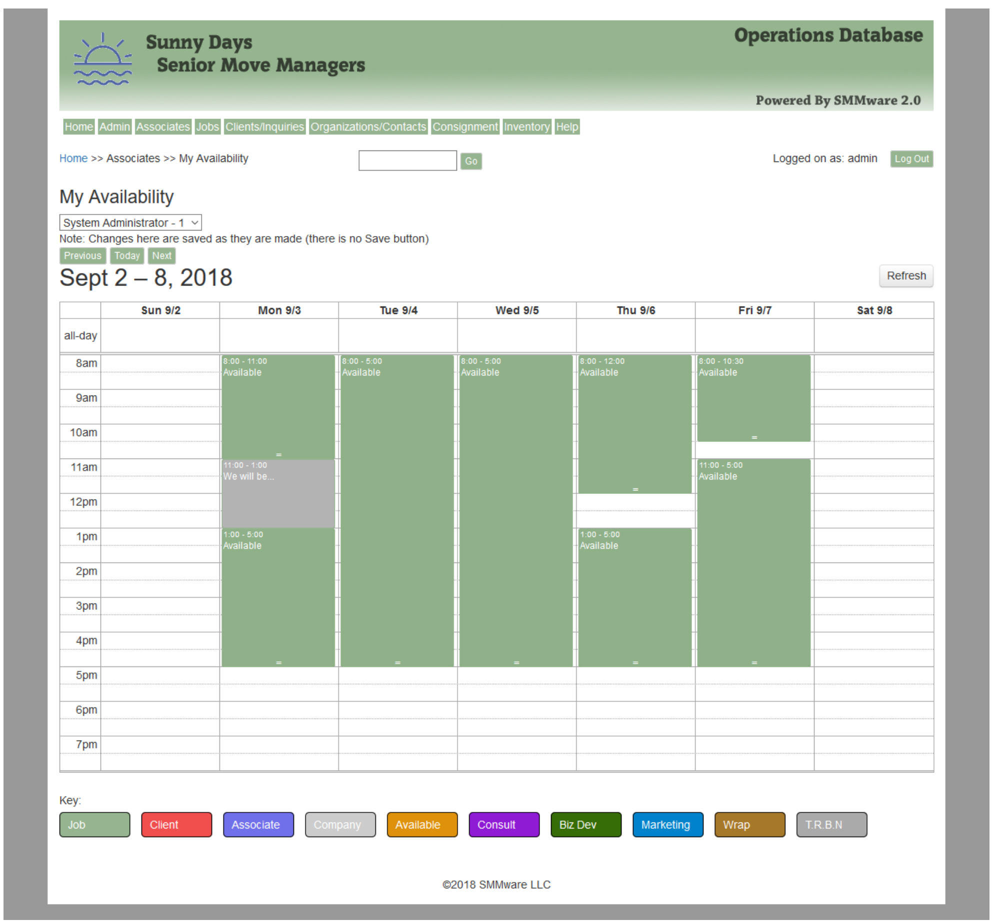
Lastly, the “Availability” based approach.

YouTube	Watch our YouTube video about Availability Based Scheduling at https://youtu.be/QkMukXOf_OQ (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)

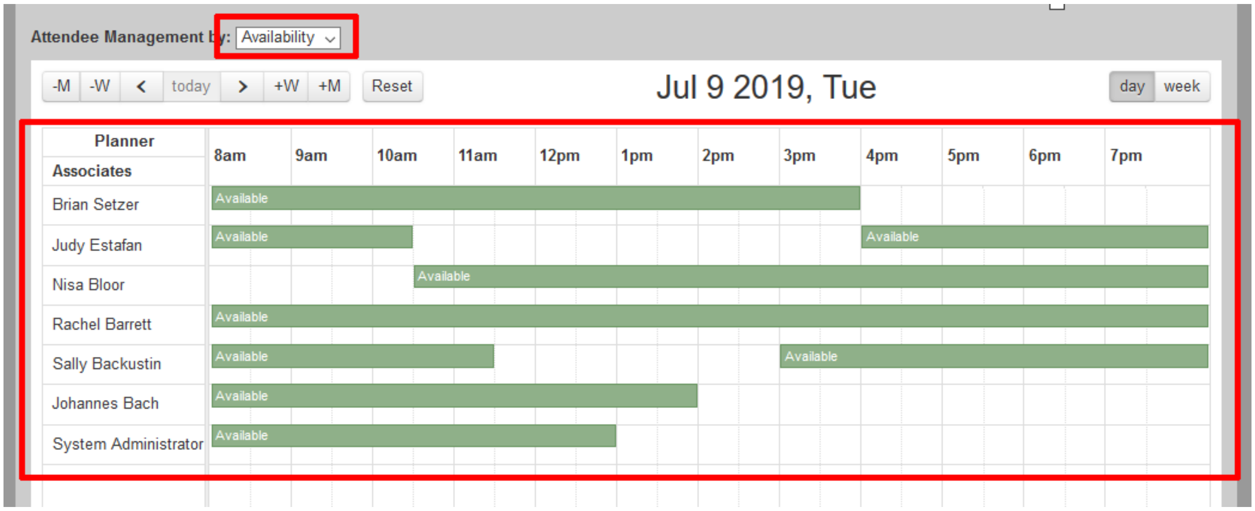
See the “Basic User” Manual for details on how associates enter their available/unavailable time.

A SMMware system can be configured for employees to describe when they can work based on their availability, or based on their unavailability, with all Associates using the same approach.

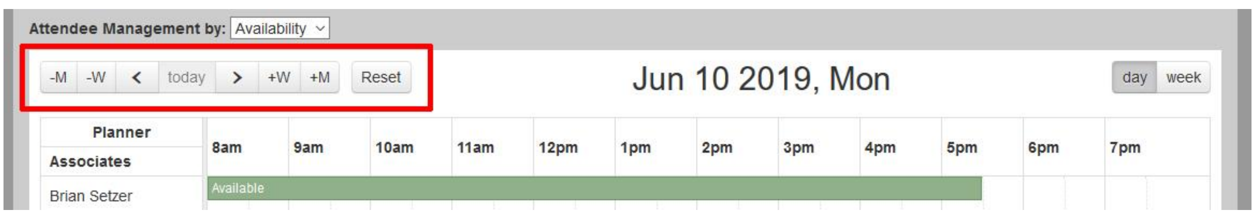
They browse to “Associates”->”My Availability” or “Associates”->”My Unavailability” and advance the calendar to the desired week. Lastly they click and drag to create entries. Below is a screenshot for My Availability. The green bars are ‘Available” entries. The grey box is an existing event this associate is part of. You can drag across multiple days, and SMMware will break the selection into individual days which can then be adjusted as usual.



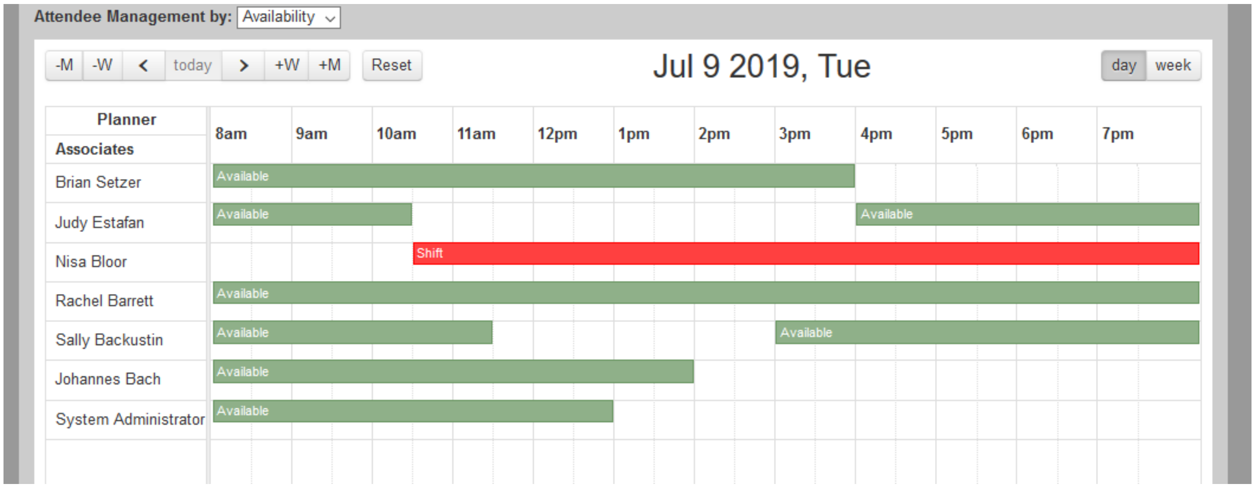
To start, when editing an event change the “Attendee Management” dropdown to “Availability” (from either Direct or Invite). At that point, a single-day calendar will appear.



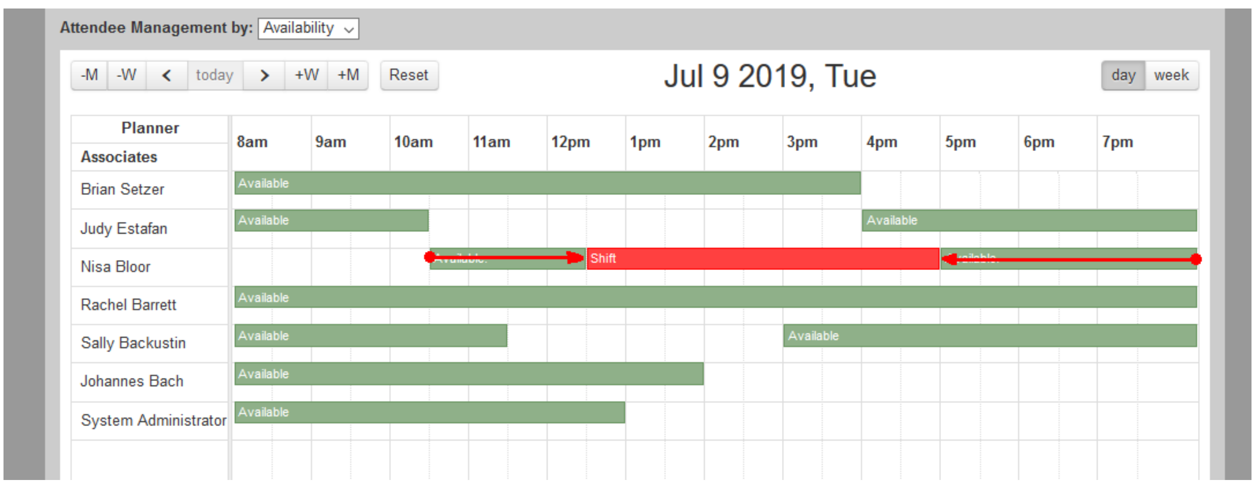
Start by navigating to the day you wish to select, using the navigation toolbar.



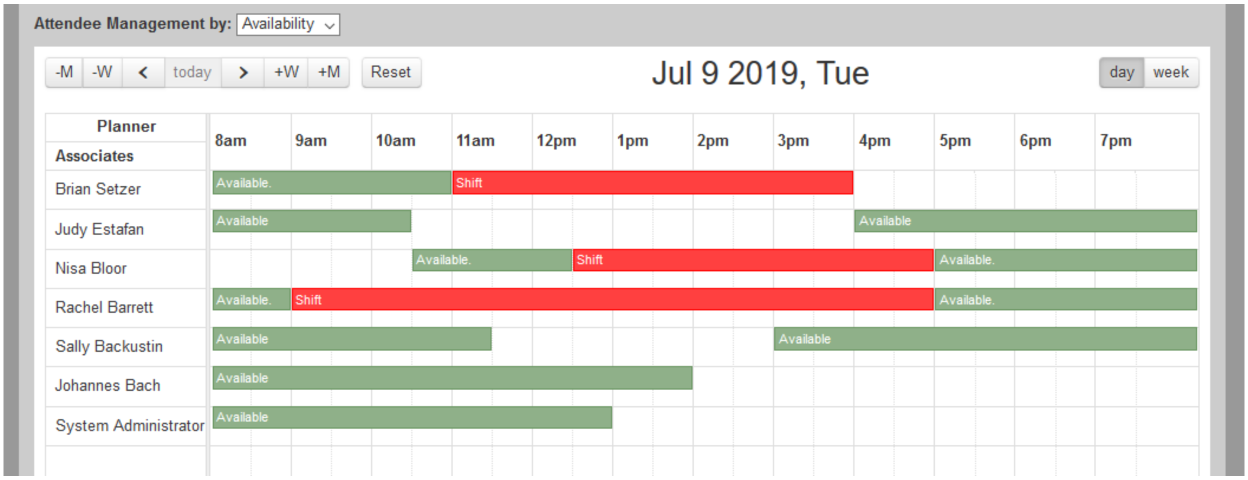
You begin by clicking on one of the ‘Available’ bars, which will turn red and have a label of ‘Shift’.



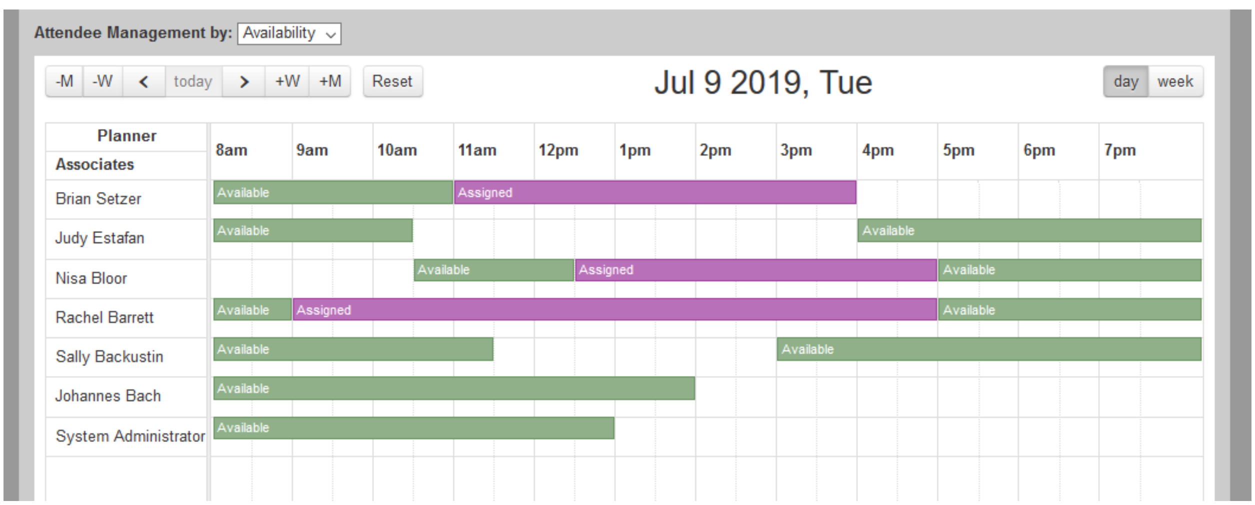
Next, you mouse over the left edge of the ‘Shift’ bar and grab and drag it to the appropriate starting time for that shift. Repeat for the end of the shift.



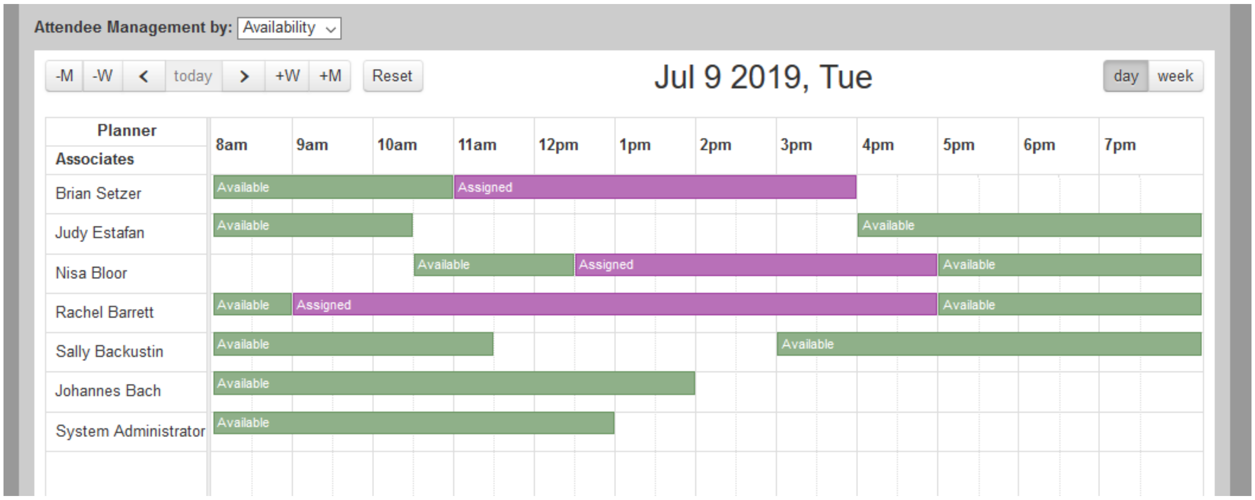
You can repeat for other Associates as needed, each with their own start and end times.



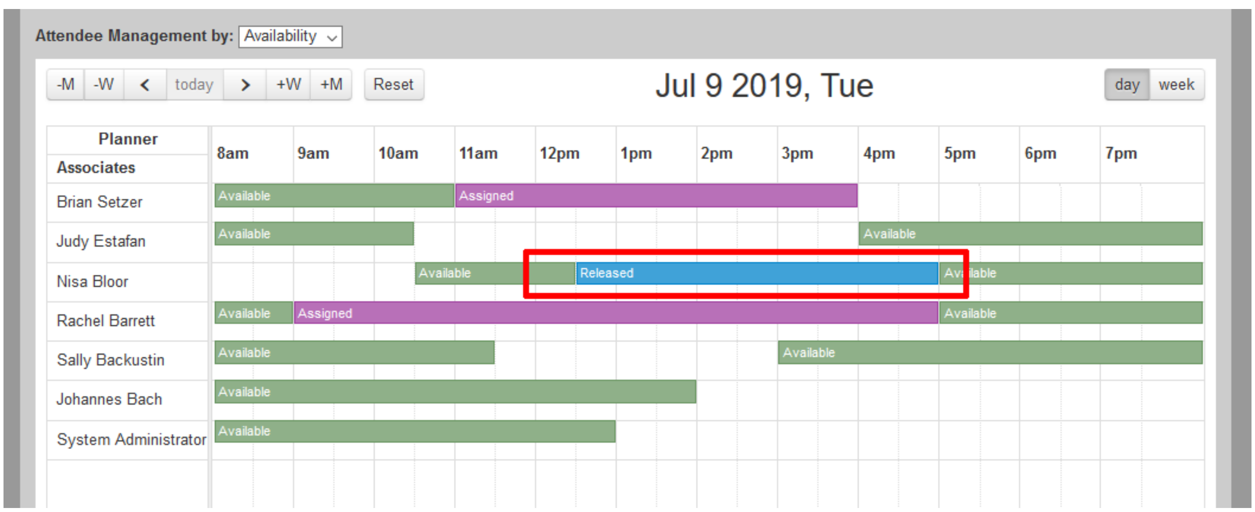
When all shifts have been assigned, click 'Save' and the screen will change to show the shifts as 'Assigned', the changes will be saved to the database, and emails will be sent out to the applicable associates.



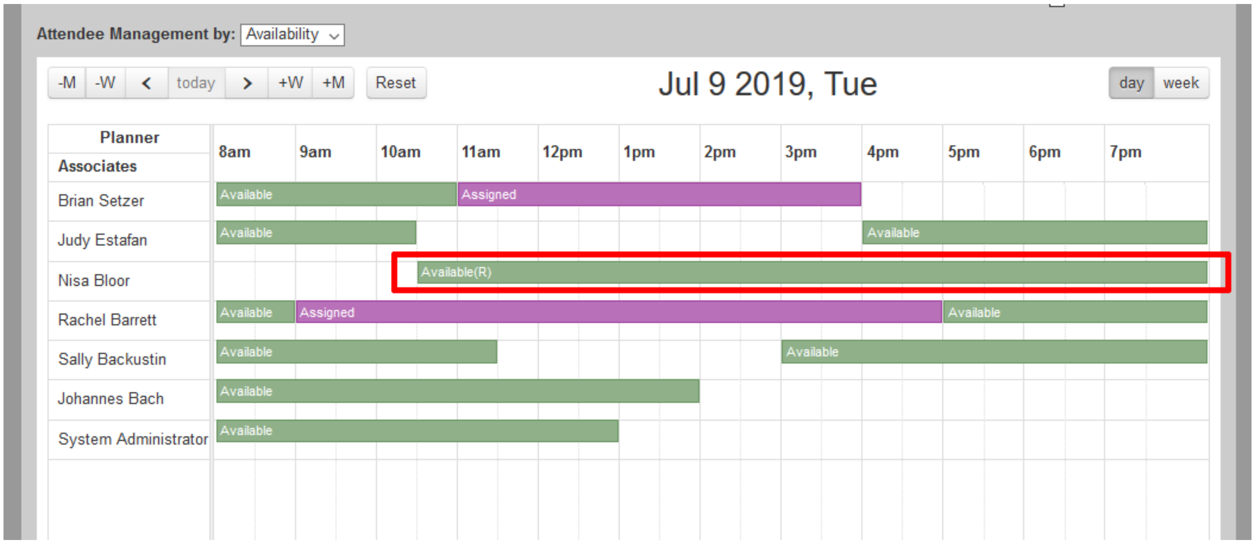
The screen below shows the final calendar with three associates assigned.



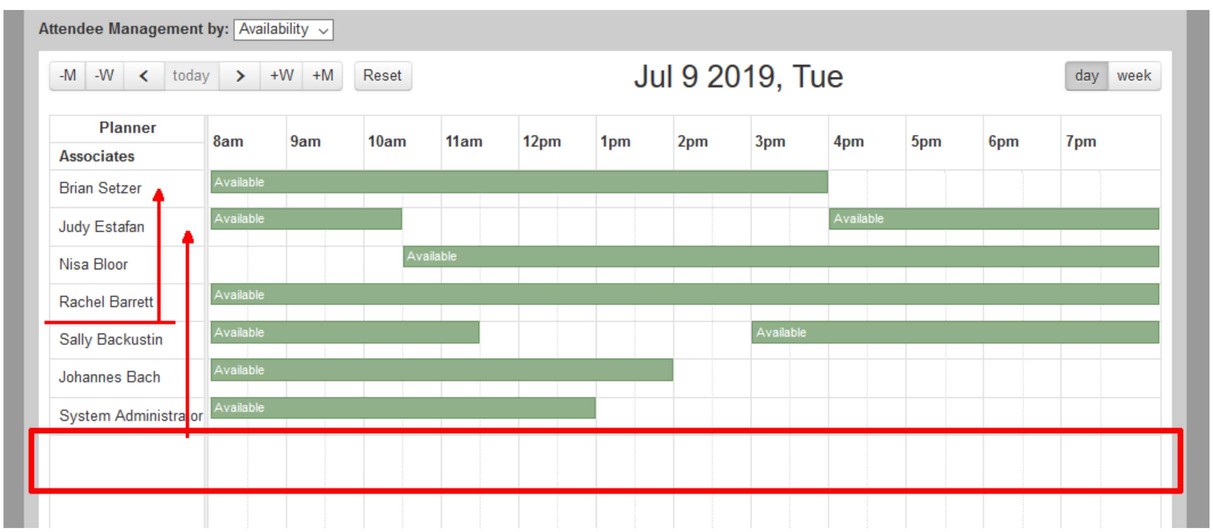
If an associate can no longer attend this event, click on “Assigned” and the label of the bar changes to say “Released”. This means that their time will not revert to “Available”, which makes sense since they are saying that they cannot work then (perhaps they are sick and going to the doctor). This is not permanent until you click “Save”.



If you then click on “Released” again, it will revert to “Available”, and this chunk will be combined with any adjacent “Available” chunks. This is appropriate when the associate is removed because things change such that you don’t need as many people as you thought, and the associate is still available to work at other events.

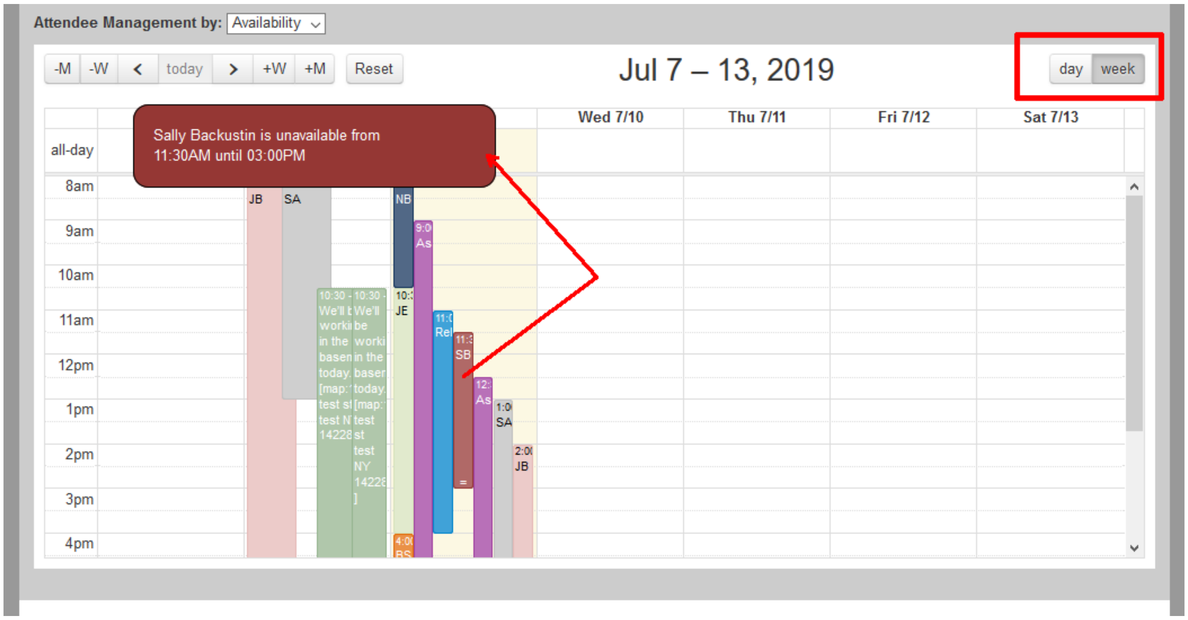


If you have ten or fifteen associates and the ones you are interested are scattered throughout the list, you can click on the name of an associate to move them to the top. In this way, you can gather the associates you want at the top, in a convenient visual summary.



An important consideration is travel time. When an associate says that they are available starting at 1pm, does that mean that they 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 they 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.

The calendar defaults to the 'day' view as seen through the images so far. But there is also a 'week' view which can be used to get a quick visual overview of who is available when. The colored bars have the initials of the relevant Associate. Clicking on any of the colored bars produces a popup with their full name and time range. Note that this view is not where you make assignments, you switch back to the 'day' view for that.



Calendar Colors

You are able to choose the color for a calendar event. A color picker is now in client profiles, job profiles, and event profiles, with 27 colors to choose from. The first option in the color picker (white, with the letter 'D' means 'Default' as in, "don't override the default color".

If you like to keep it simple: Just know that when you set the color from within an event profile (editing or adding an event from the Master Calendar), that color will be used for that event in the calendar.

If you are a Power User: There is a hierarchy that determines the color used in the calendars.

- By default, the color used by a calendar event comes from the event tag (job tag, sales lead tag, associate tag, client tag, company tag, etc.)
- Setting a color in a client profile overrides the default color from the event tag
- Setting a color in a job profile overrides a color set in the client profile.
- Setting a color in the event profile overrides everything else.

This system means that if you want all the events for a client to share the same color, you can set the color in one spot (the client profile) and all their events will share that color. Similarly, if you want all the events for a job to share the same color, you can set the color in one spot (the job profile).

Lastly, in the calendar popup for an event: If the event is tagged for a job, there is now a "Job Profile" hyperlink, and if the event is tagged for a client, there is a "Client Profile" hyperlink.

The Consignment Menu

These commands are not available to the Basic User.

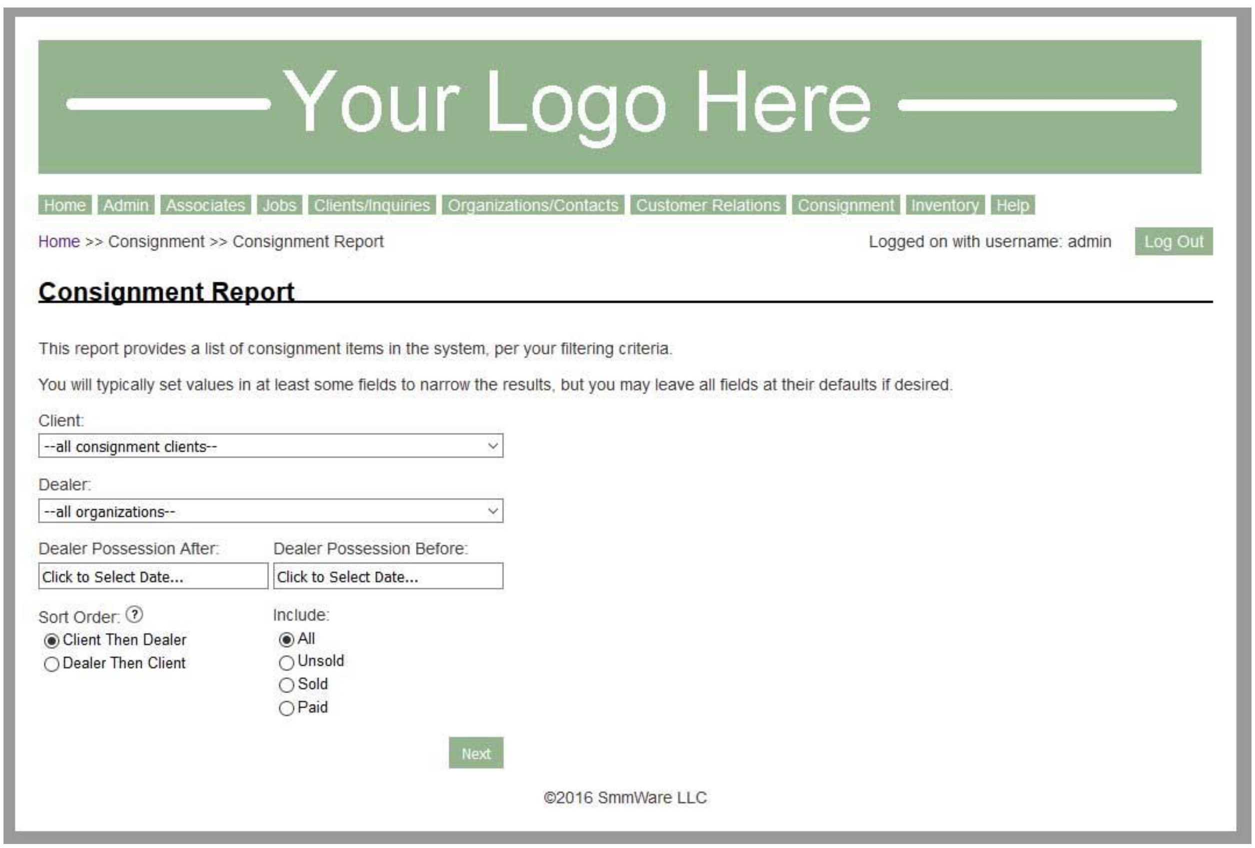
Consignment Dealers are Organizations that have been assigned to the category “Consignment & Retail”

	Watch our YouTube video about Consignment Sales at https://youtu.be/LW3jQaOsVx4 (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)

Consignment Report

This command allows you to see all items presently with various Consignment Dealers. You can filter the items based on the client, the dealer, and a date range that compares against the date of Dealer Possession.

You can sort the resulting listing first by Client and then by Dealer or vice versa using the Sort Order radio buttons.



You can further limit the output based on the item status of Unsold, Sold, Paid, or All.

You can leave all the filtering fields at their defaults if desired.

The report provides a variety of detail on the item, from the item number assigned to it by the dealer, to its present status.

Consignment Report

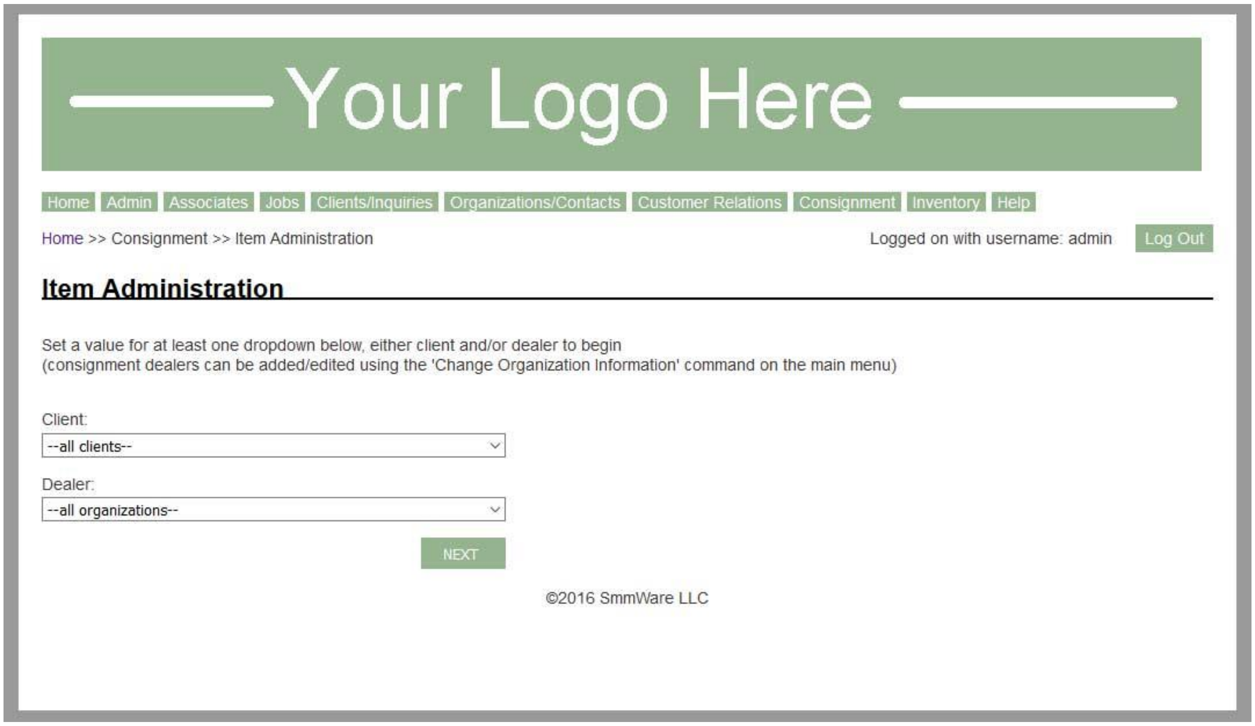
Report Date: 2016-10-14
Number of items found: 52
Date Range: no dates selected
Client: William Saint
Organization: Heritage Antiques
All / Unsold / Sold / Paid? : All items
Sort Order: Client then Dealer (Provides Client Totals)

Client	Item Description	Item Number: Dealer (Internal)	Sold for Amount	Dealer Expenses	Dealer Card Fee	Dealer Comm.	Item Receipt Amount	Company Expenses	Company Comm.	Client Amount Due	Number of Pieces	Date: Dealer Possession, Check Recorded	Item Status
Client: William Saint (ID: 244)													
	Dealer: Heritage Antiques (ID: 149)												
	FISH PLATTER	GT1129 (513)	$20.00	$.00	$0.00	$8.00 40%	$12.00	$.00	$3.00 15.00%	$9.00	1	2013-05-25 2013-07-05	Paid (PID:141)
	GREEN PLANTER	GT1133 (517)	$25.00	$.00	$0.00	$10.00 40%	$15.00	$.00	$3.75 15.00%	$11.25	1	2013-05-25 2016-01-03	Paid (PID:355)
	JAPANESE IMARI SMALL PLATE	GT1137 (521)	$27.00	$.00	$0.00	$10.80 40%		$.00	$4.05 15.00%		1	2013-05-25 2013-08-05	Paid (PID:141)
	ASIAN PLANTER	GT1141 (525)	$22.00	$.00	$0.00	$8.80 40%		$.00	$3.30 15.00%		1	2013-05-25 2013-09-05	Paid (PID:160)
	ASIAN BLUE & WHITE BOWL	GT1145 (529)	$31.00	$.00	$0.00	$12.40 40%		$.00	$4.65 15.00%		1	2013-05-25 2013-09-05	Paid (PID:160)
	GROUPING OF 4 ASIAN AS FOUND DISHES	GT1149 (533)	$25.00	$.00	$0.00	$10.00 40%	$15.00	$.00	$3.75 15.00%	$11.25	1	2013-05-25 2016-01-04	Paid (PID:355)
	ASIAN PORTRAIT	GT1159 (556)	$310.00	$.00	$0.00	$124.00 40%	$186.00	$.00	$46.50 15.00%	$139.50	1	2013-05-25 2013-10-05	Paid (PID:175)
	Set of 3 pillows	GT1162 (706)	$23.00	$.00	$0.00	$9.20 40%		$.00	$3.45 15.00%		1	2013-05-25 2013-07-05	Paid (PID:141)
	PHOTO OF KENNEDY SIGNATURE?	GT1300 (733)	$22.00	$.00	$0.00	$8.80 40%		$.00	$3.30 15.00%		1	2013-05-25 2013-08-05	Paid (PID:141)
	ASIAN PRINT	GT1304 (737)	$25.00	$.00	$0.00	$10.00 40%	$15.00	$.00	$3.75 15.00%	$11.25	1	2013-05-25 2016-10-14	Paid (PID:356)
	OKADA REMINISCENCE	GT1308 (741)	$25.00	$.00	$0.00	$10.00 40%	$15.00	$.00	$3.75 15.00%	$11.25	1	2013-05-25 2016-10-14	Paid (PID:356)

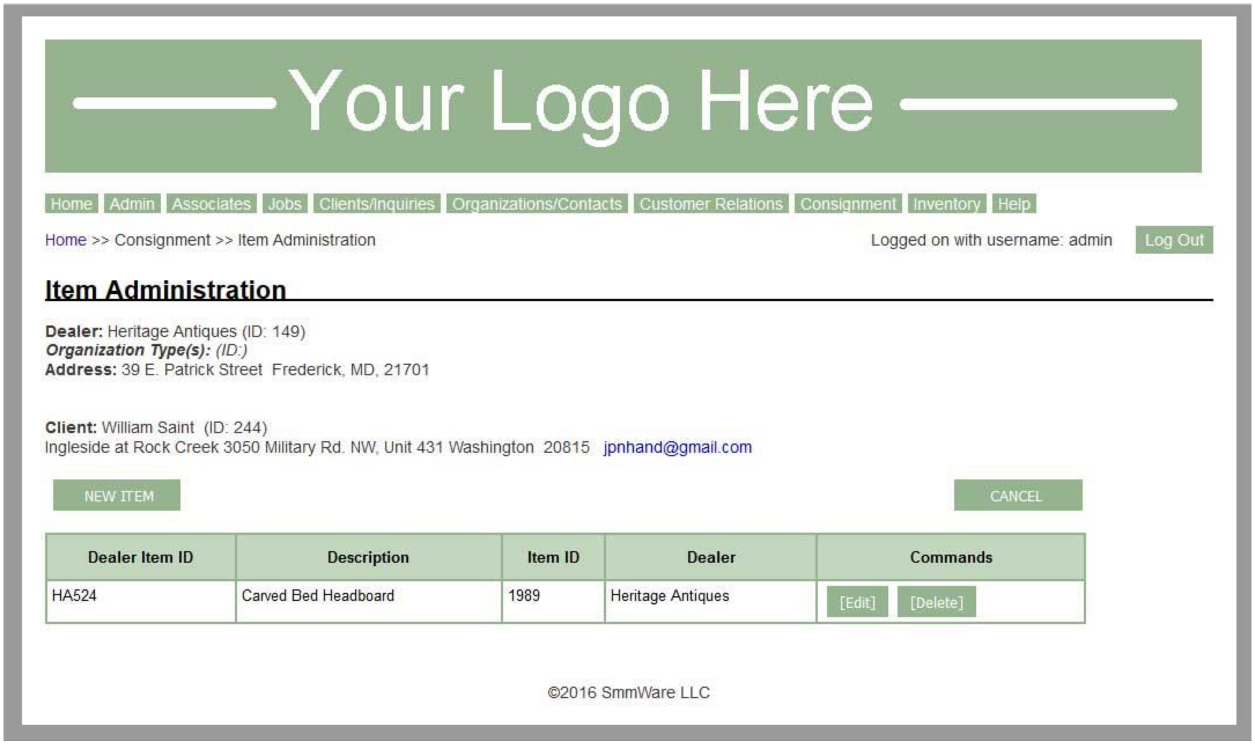
Item Administration

This command allows you to enter consignment items into the system.

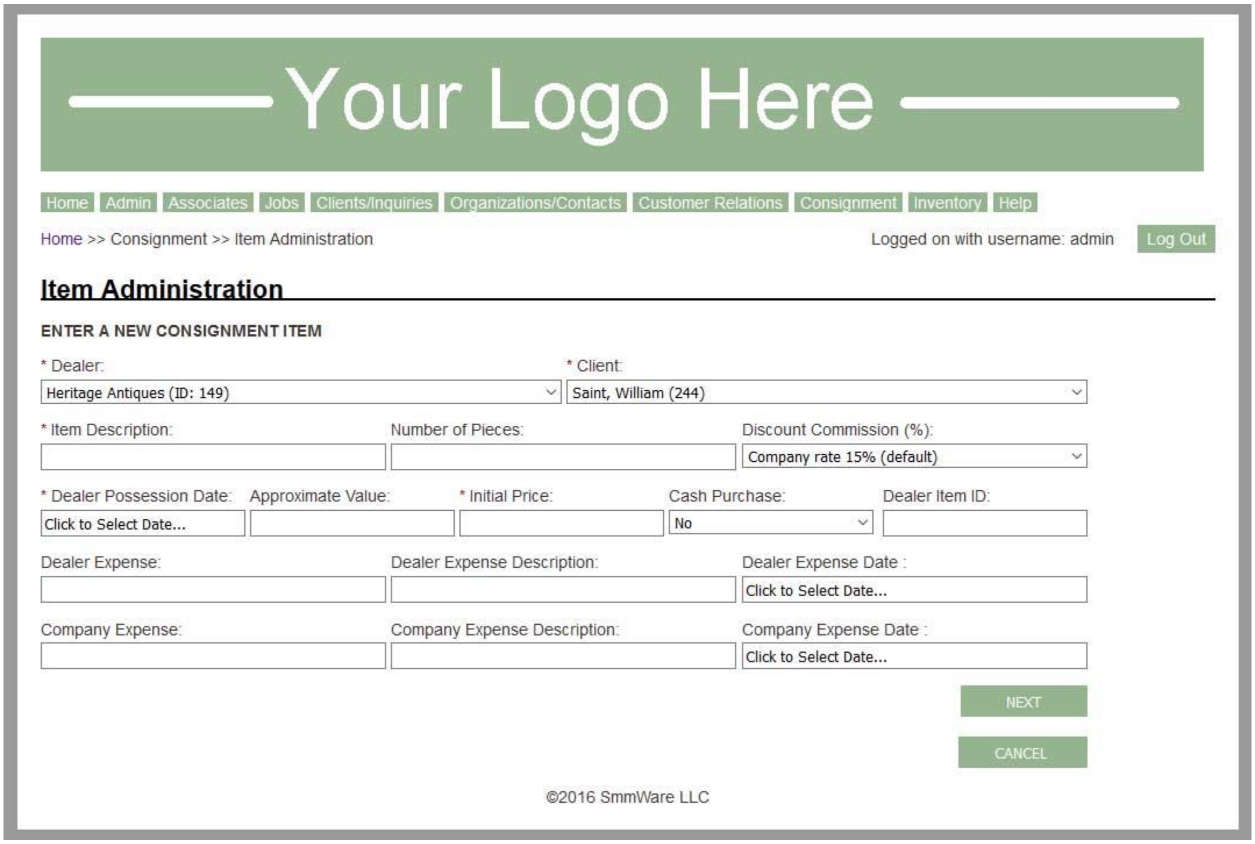
Screen 1, selection: You must select at least on of the two dropdowns, Clients and Dealer. Then click next.



Screen 2, listing: Displays a list of existing items. Click the "New Item" button to add items.



Screen 3, new/edit: Most of the fields are self explanatory. The initial price could also be labelled as "Estimated Value", the point being that the sold price may be lower.



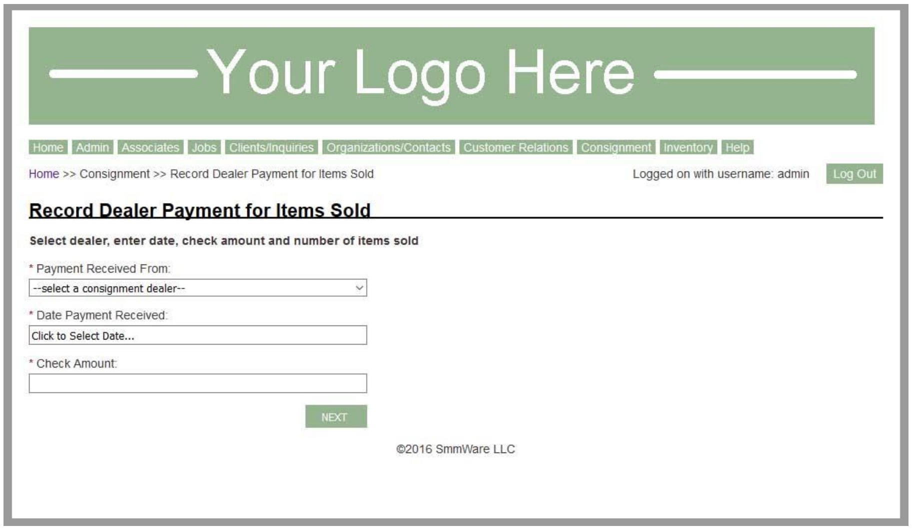
Sometimes instead of taking an item on consignment, dealers will buy it outright. In that case, you can switch the "Cash Purchase" dropdown to "yes". In that case, dealer expenses and commission do not apply.

The Discount Commission could also be thought of as "Company Commission". The dropdown lists the normal options but there is a default setting.

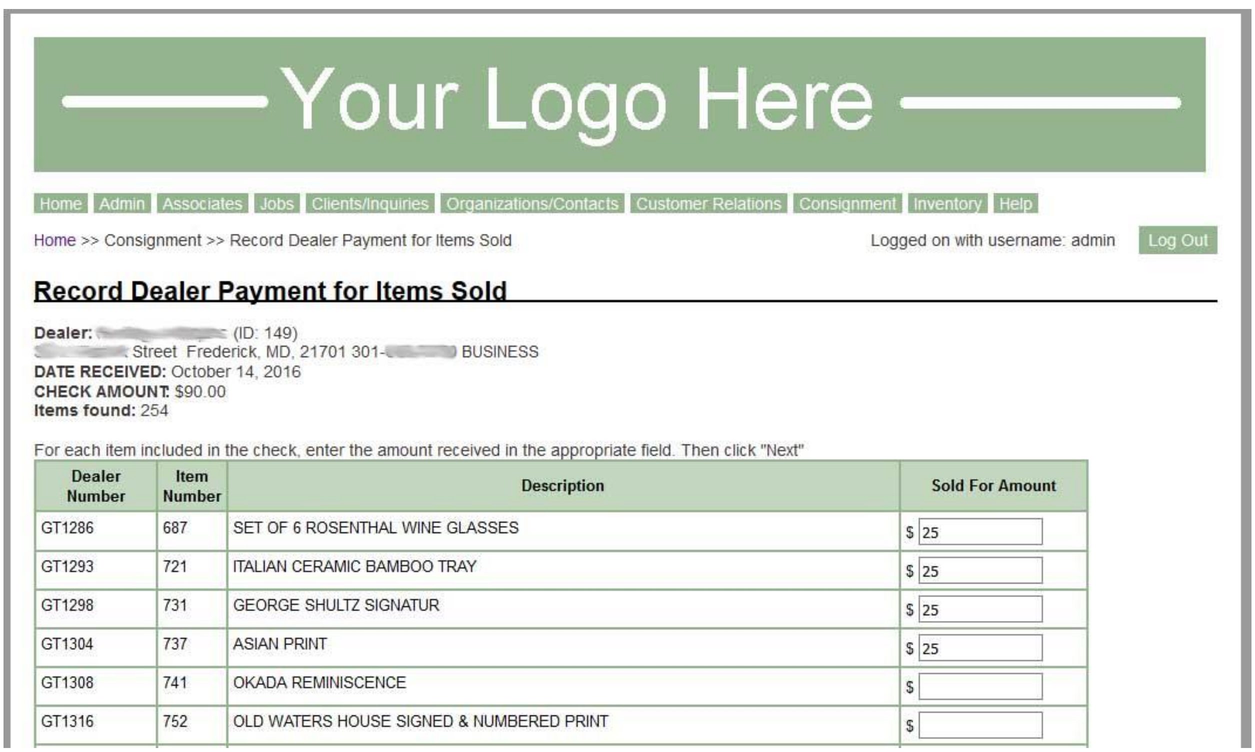
Record Dealer Payments for Items Sold

Typically a dealer does not send a separate check for each item sold, but rather sends one for a given period of time, covering multiple items. Or they send a check when the amount they owe you reaches a certain amount.

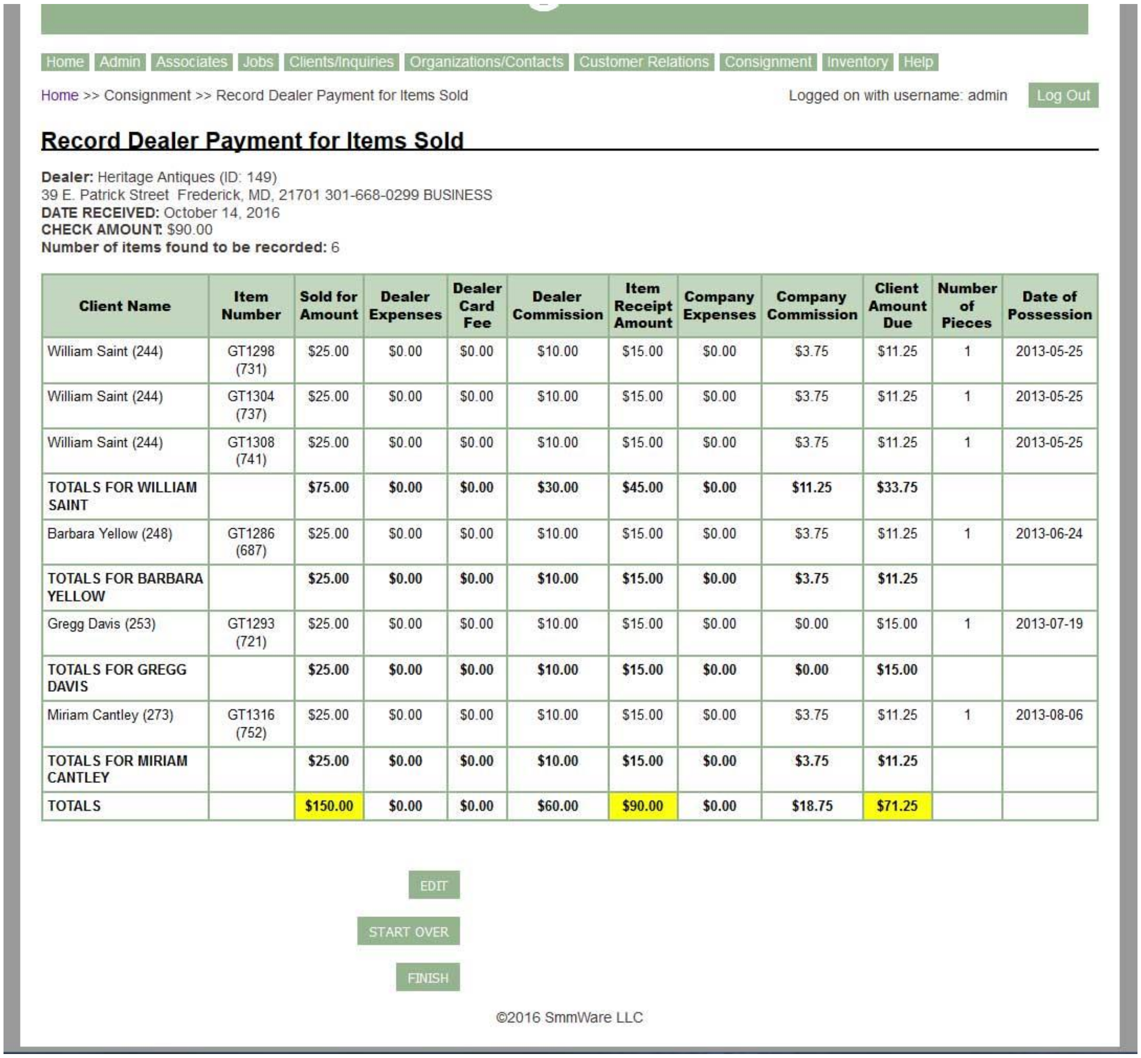
Therefore the system is built with the expectation that the checks you receive will cover multiple items, The first screen for this command asks you to indicate which dealer is involved, the date of the check and the amount of the check. Even though the next screens deal with the individual items and their amount, the total is asked for here so that the system has enough information to verify the calculations.



The next screen lists all items presently with the dealer. For those items which have sold, you enter the 'sold for' amounts in the text fields. When all items have been accounted for, click "Next" at the bottom of the screen.



On the Review screen next, the various numbers are calculated per item, including expenses, commissions, and amount due to client. At this point, nothing has been recorded to the database. If the numbers all add up, at the bottom of the screen click on the “FINISH” button and the database will be updated.



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

Home >> Consignment >> Record Dealer Payment for Items Sold

Logged on with username: admin   Log Out

Record Dealer Payment for Items Sold

Dealer: Heritage Antiques (ID: 149)
39 E. Patrick Street Frederick, MD, 21701 301-668-0299 BUSINESS
DATE RECEIVED: October 14, 2016
CHECK AMOUNT: $90.00
Number of items found to be recorded: 6

Client Name	Item Number	Sold for Amount	Dealer Expenses	Dealer Card Fee	Dealer Commission	Item Receipt Amount	Company Expenses	Company Commission	Client Amount Due	Number of Pieces	Date of Possession
William Saint (244)	GT1298 (731)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$3.75	$11.25	1	2013-05-25
William Saint (244)	GT1304 (737)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$3.75	$11.25	1	2013-05-25
William Saint (244)	GT1308 (741)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$3.75	$11.25	1	2013-05-25
TOTALS FOR WILLIAM SAINT		**$75.00**	**$0.00**	**$0.00**	**$30.00**	**$45.00**	**$0.00**	**$11.25**	**$33.75**		
Barbara Yellow (248)	GT1286 (687)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$3.75	$11.25	1	2013-06-24
TOTALS FOR BARBARA YELLOW		**$25.00**	**$0.00**	**$0.00**	**$10.00**	**$15.00**	**$0.00**	**$3.75**	**$11.25**		
Gregg Davis (253)	GT1293 (721)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$0.00	$15.00	1	2013-07-19
TOTALS FOR GREGG DAVIS		**$25.00**	**$0.00**	**$0.00**	**$10.00**	**$15.00**	**$0.00**	**$0.00**	**$15.00**		
Miriam Cantley (273)	GT1316 (752)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$3.75	$11.25	1	2013-08-06
TOTALS FOR MIRIAM CANTLEY		**$25.00**	**$0.00**	**$0.00**	**$10.00**	**$15.00**	**$0.00**	**$3.75**	**$11.25**		
TOTALS		**$150.00**	**$0.00**	**$0.00**	**$60.00**	**$90.00**	**$0.00**	**$18.75**	**$71.25**		

EDIT

START OVER

FINISH

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If the numbers did not add up, you will see a message at the top of the screen with some feedback about the problem. In this case, you’ll want to use the “EDIT” button to go back and correct the problem.

Number of items found to be recorded: 6

The calculated check amount ($96.00) is $6.00 GREATER THAN the actual check amount $90.00

Client Name	Item Number	Sold for Amount	Dealer Expenses	Dealer Card Fee	Dealer Commission	Item Receipt Amount	Company Expenses	Company Commission	Client Amount Due	Number of Pieces	Date of Possession
William Saint (244)	GT1298 (731)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$3.75	$11.25	1	2013-05-25
William Saint (244)	GT1304 (737)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$3.75	$11.25	1	2013-05-25

Once the numbers are correct and you click "FINISH", the next screen tells you that the check has been applied to items. At this point, the changes have been saved to the database.

Dealer: Heritage Antiques (ID: 149)
39 E. Patrick Street Frederick, MD, 21701 301-668-0299 BUSINESS
DATE RECEIVED: October 14, 2016
CHECK AMOUNT: $90.00
Number of items found to be recorded: 6

Client Name	Item Number	Sold for Amount	Dealer Expenses	Dealer Card Fee	Dealer Commission	Item Receipt Amount	Company Expenses	Company Commission	Client Amount Due	Number of Pieces	Date of Possession
William Saint (244)	GT1298 (731)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$3.75	$11.25	1	2013-05-25
William Saint (244)	GT1304 (737)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$3.75	$11.25	1	2013-05-25
William Saint (244)	GT1308 (741)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$3.75	$11.25	1	2013-05-25
TOTALS FOR WILLIAM SAINT		**$75.00**	**$0.00**	**$0.00**	**$30.00**	**$45.00**	**$0.00**	**$11.25**	**$33.75**		
Barbara Yellow (248)	GT1286 (687)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$3.75	$11.25	1	2013-06-24
TOTALS FOR BARBARA YELLOW		**$25.00**	**$0.00**	**$0.00**	**$10.00**	**$15.00**	**$0.00**	**$3.75**	**$11.25**		
Gregg Davis (253)	GT1293 (721)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$0.00	$15.00	1	2013-07-19
TOTALS FOR GREGG DAVIS		**$25.00**	**$0.00**	**$0.00**	**$10.00**	**$15.00**	**$0.00**	**$0.00**	**$15.00**		
Miriam Cantley (273)	GT1316 (752)	$25.00	$0.00	$0.00	$10.00	$15.00	$0.00	$3.75	$11.25	1	2013-08-06
TOTALS FOR MIRIAM CANTLEY		**$25.00**	**$0.00**	**$0.00**	**$10.00**	**$15.00**	**$0.00**	**$3.75**	**$11.25**		
TOTALS		**$150.00**	**$0.00**	**$0.00**	**$60.00**	**$90.00**	**$0.00**	**$18.75**	**$71.25**		

$90.00 RECEIPT (ID: 139) FROM Heritage Antiques ON 2016, October WAS APPLIED TO 6 ITEMS.

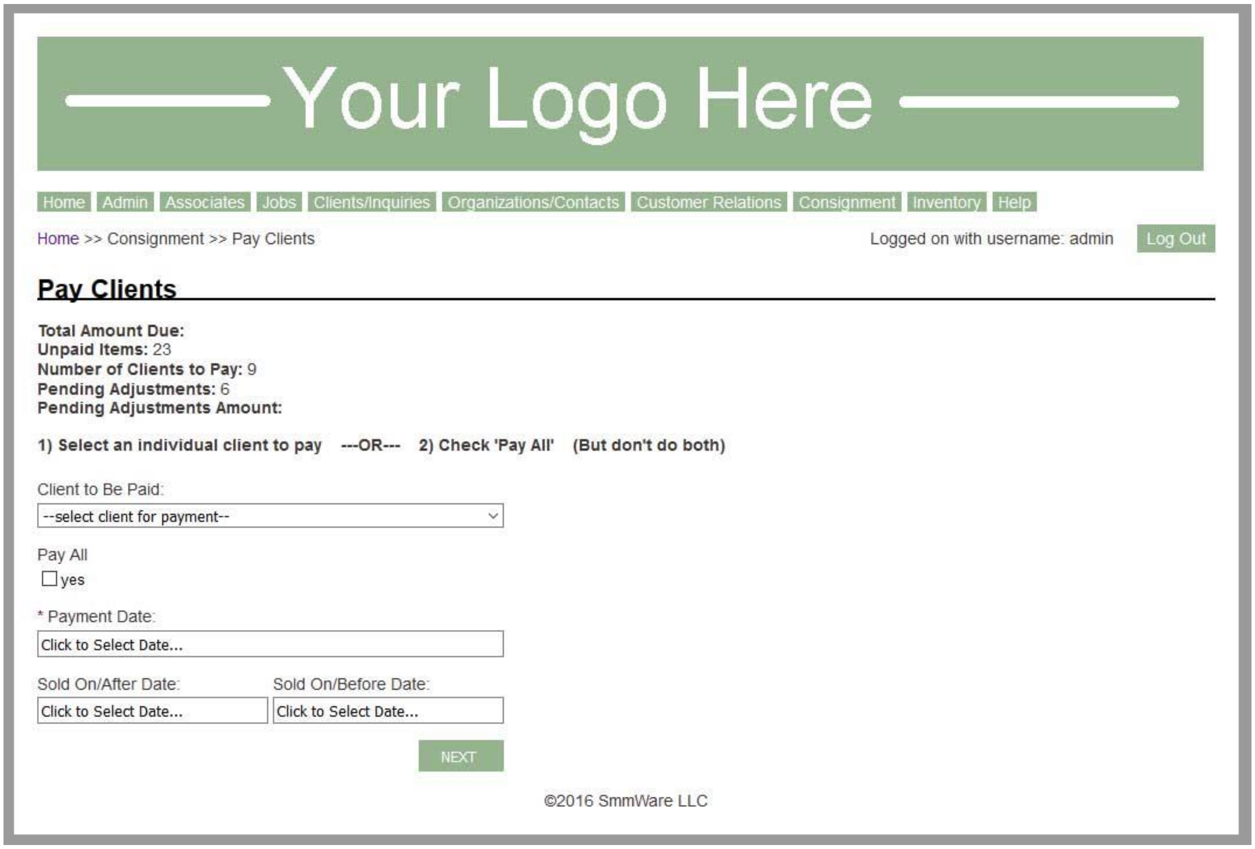
Enter another check

Pay Clients

Once the consignment dealer has paid you, the next step is for you to pay the client.

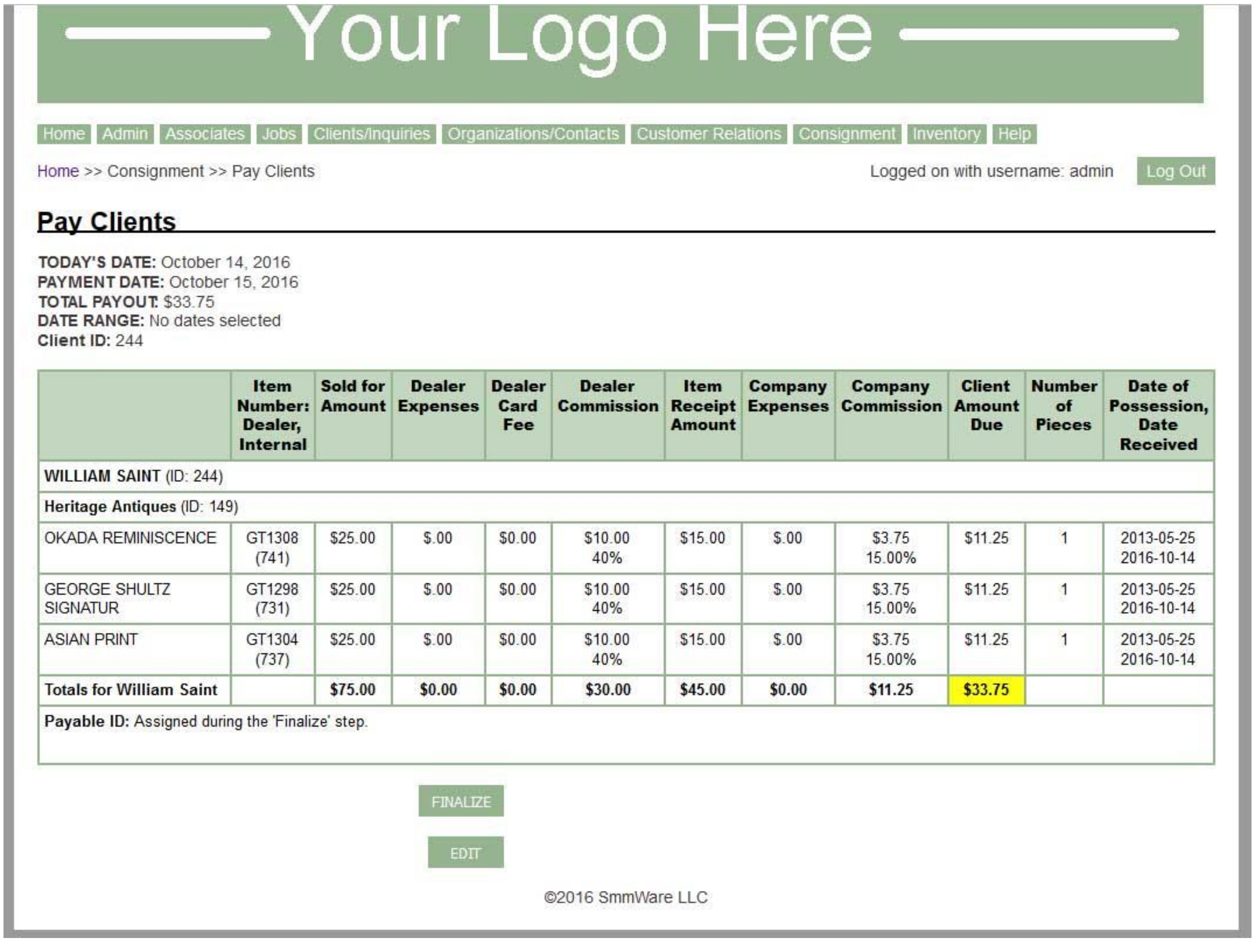
On the first screen, you can decide to send checks to all clients who are owed by clicking on the checkbox "Pay All", or you can pick one client from the "Client's To Be Paid" dropdown. You must also enter the date of payment.

The "Sold On/After Date" and "Sold On/Before Date" dropdowns can be used to filter the output, but can both be left blank if desired.



The next screen lets you review the details of the transaction and provides you with the amount due to the client. The screen can contain information for multiple clients if "Pay All" was selected on screen 1.

At this point, the database has not been changed. Click on “FINALIZE” to have the check(s) recorded to the database.



Your Logo Here

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

Home >> Consignment >> Pay Clients

Logged on with username: admin

Log Out

Pay Clients

TODAY'S DATE: October 14, 2016
PAYMENT DATE: October 15, 2016
TOTAL PAYOUT: $33.75
DATE RANGE: No dates selected
Client ID: 244

	Item Number: Dealer, Internal	Sold for Amount	Dealer Expenses	Dealer Card Fee	Dealer Commission	Item Receipt Amount	Company Expenses	Company Commission	Client Amount Due	Number of Pieces	Date of Possession, Date Received
WILLIAM SAINT (ID: 244)											
Heritage Antiques (ID: 149)											
OKADA REMINISCENCE	GT1308 (741)	$25.00	$.00	$0.00	$10.00 40%	$15.00	$.00	$3.75 15.00%	$11.25	1	2013-05-25 2016-10-14
GEORGE SHULTZ SIGNATUR	GT1298 (731)	$25.00	$.00	$0.00	$10.00 40%	$15.00	$.00	$3.75 15.00%	$11.25	1	2013-05-25 2016-10-14
ASIAN PRINT	GT1304 (737)	$25.00	$.00	$0.00	$10.00 40%	$15.00	$.00	$3.75 15.00%	$11.25	1	2013-05-25 2016-10-14
Totals for William Saint		**$75.00**	**$0.00**	**$0.00**	**$30.00**	**$45.00**	**$0.00**	**$11.25**	**$33.75**		
Payable ID: Assigned during the 'Finalize' step.											

FINALIZE

EDIT

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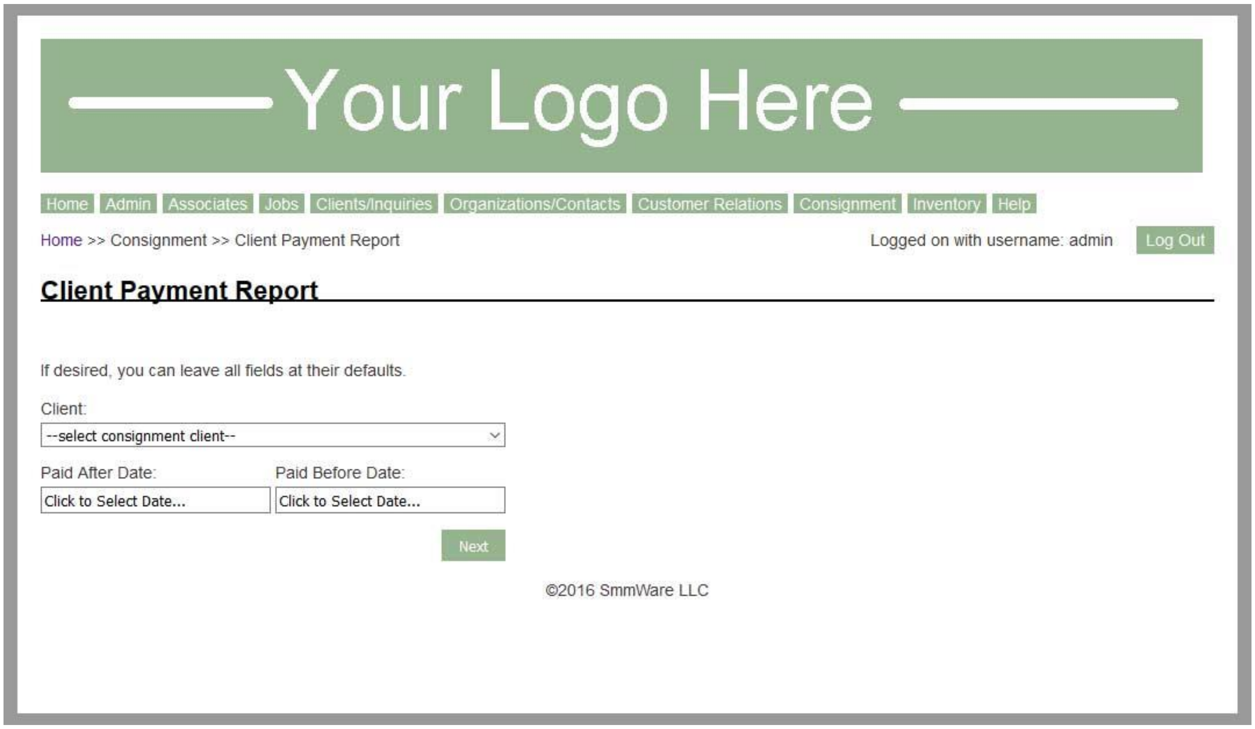
Client Payment Report

This command does not make changes to the database, it allows you to review checks for clients that have been created in the past. Each check is labelled with a "Payment ID".

On the first screen, you can set a client and a date range for display. And then click NEXT. You can, if you like, leave all the filters at their default values.



On the second screen you will see details about the different payments made to clients. This report can contain details for multiple clients if the client dropdown from screen 1 was left at the default.

Client Payment Report

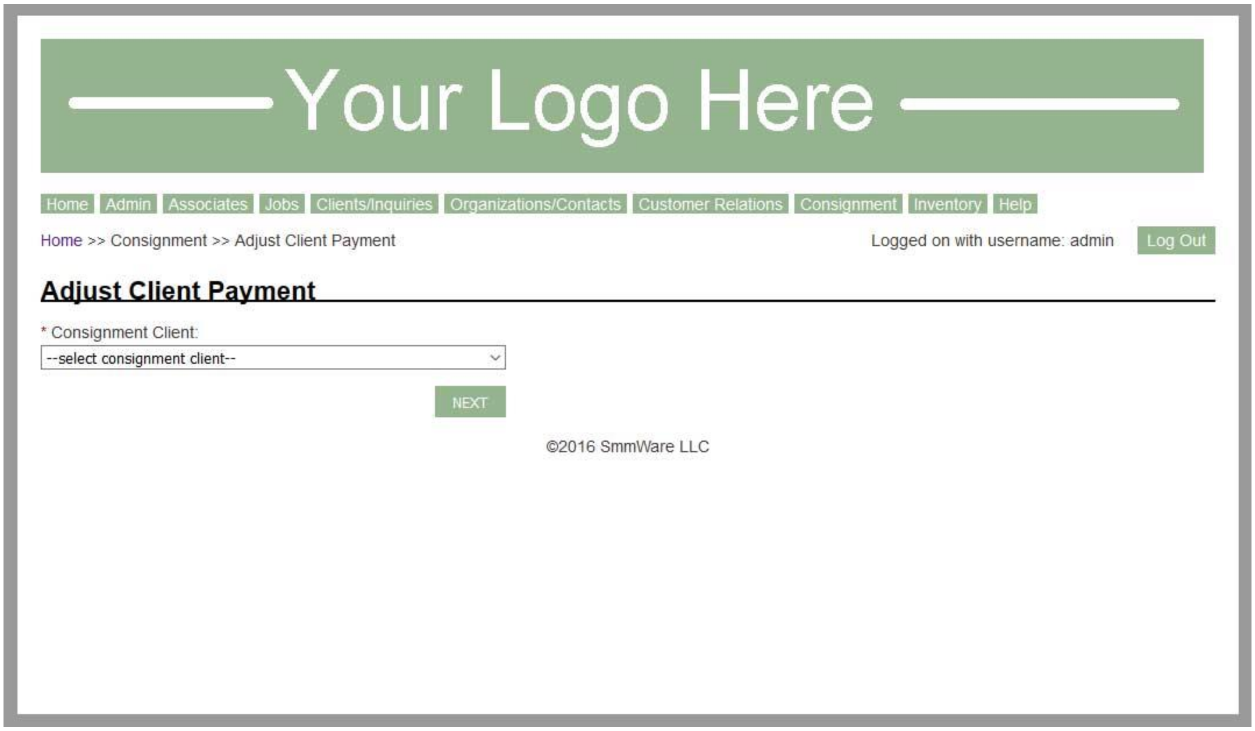
Report Date: 2016-10-14
52 items included in report
Date Range: no dates selected
Client ID: 244

Client Name Item Description	Number of Pieces	Item Number: Dealer (Internal)	Payment ID	Amount Paid	Date Paid	Sold for Amount	Receipt Date	Receipt ID	Dealer Name
William Saint (244)									
CASH PURCHASE FOR SMALL LOT OF SILVER PLATE, STERLING AND POTTERY	1	GTCPWS1 (535)	123	$42.50	2013-07-13	$50.00	2013-06-05	107	Heritage Antiques
Payment ID 123 **Total for William Saint**				$42.50					
ASIAN POTTERY BOWL	1	GT1148 (532)	141	$9.00	2013-08-26	$20.00	2013-07-05	108	Heritage Antiques
WOODEN STAND	1	GT1143 (527)	141	$9.00	2013-08-26	$20.00	2013-07-05	108	Heritage Antiques
2 FRAMED JAPAN PRIME MINISTER PHOTOS	1	GT1314 (749)	141	$9.00	2013-08-26	$20.00	2013-08-05	109	Heritage Antiques
JOHNSON SIGNATURE	1	GT1299 (732)	141		2013-08-26	$22.00	2013-08-05	109	Heritage Antiques
CASH PURCHASE FOR 6 PICTURE FRAMES	1	CPSHERMAN02 (750)	141	$34.00	2013-08-26	$40.00	2013-08-05	109	Heritage Antiques

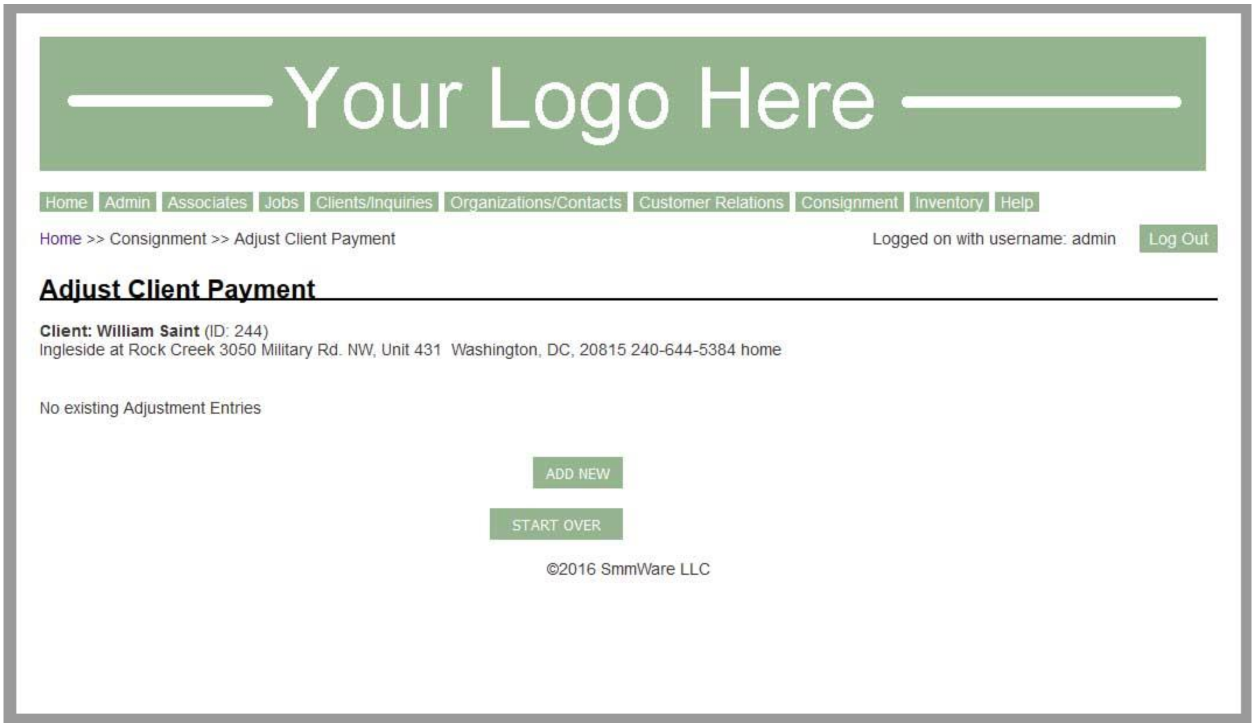
Adjust Client Payment

Sometimes it is necessary to adjust how much the client is paid separate from how much the item was sold for. This command lets you handle that. The next time you set up a check to pay this client for consignment items, the adjustment will be added to the total.

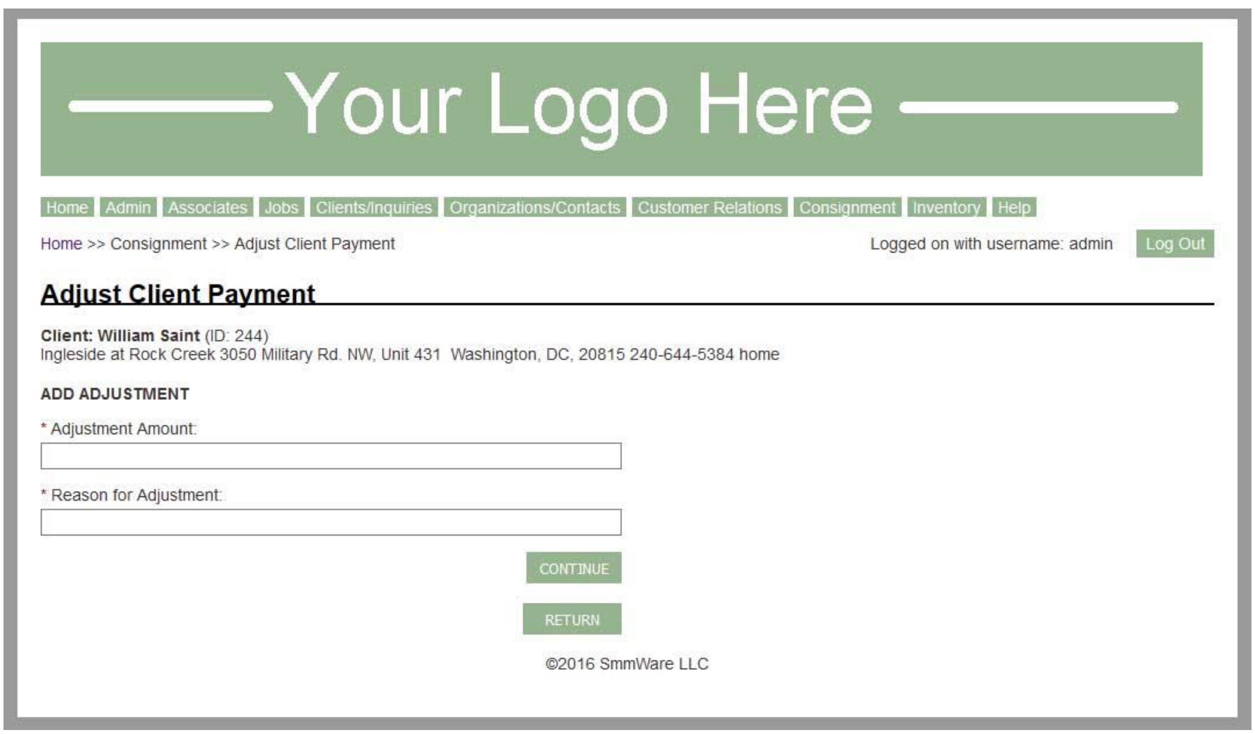
First on screen1, select the client.



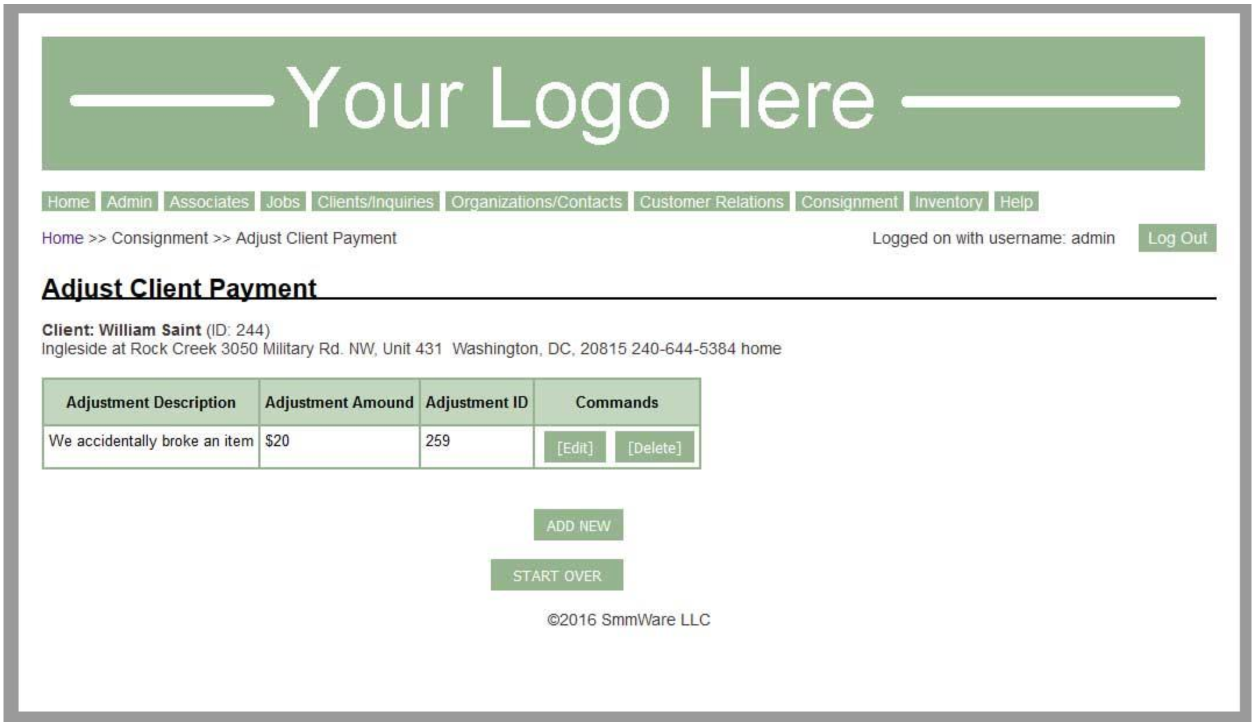
The second screen starts with a listing of any existing adustments. To create another adjustment, click on the “Add New” button.



Each adjustment consists of the amount of the adjustment, plus a text description why the adjustment is being offered.

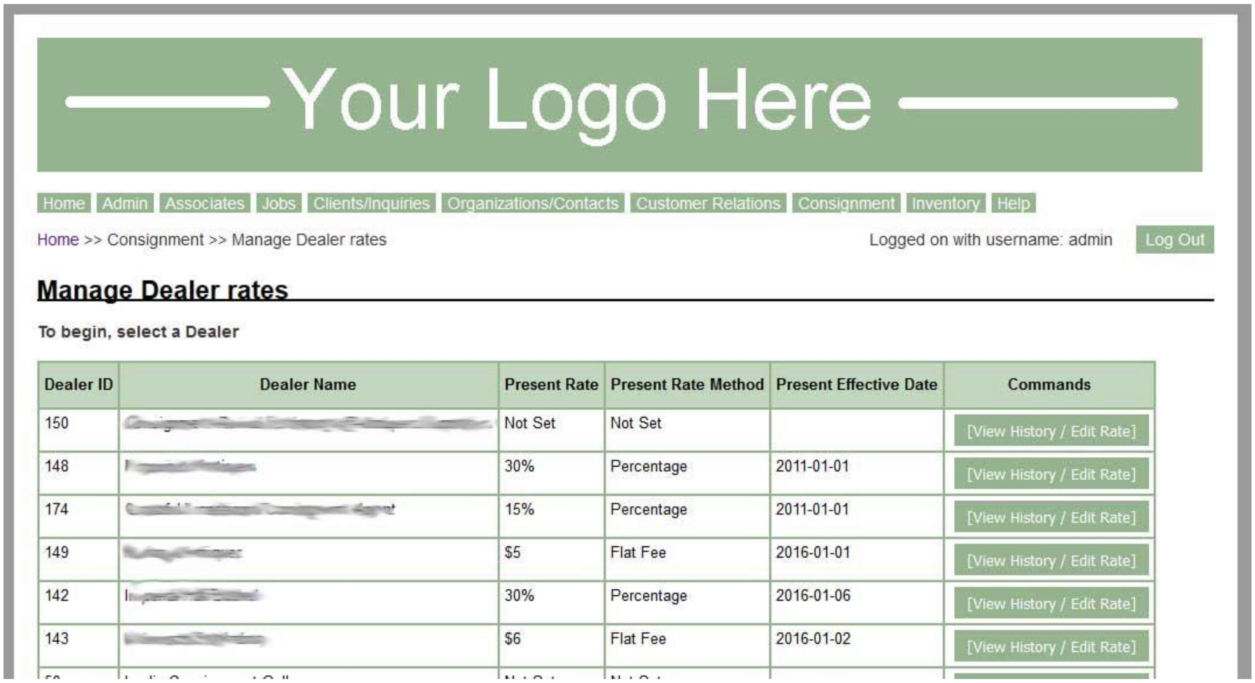


When the adjustment is complete, you can return to the main screen and see the new adjustment listed.



Manage Dealer Rates

SMMware keeps a history of the commission rates charged by dealers, to maintain accuracy as rates change over time. The initial screen shows a list of dealers and the commission rates they are charging. Rates can be either a percentage or a flat rate. Click on the “View History / Edit Rates” button to work with an individual dealer.



The dealer screen shows you a history of rates. If a rate has been set but not yet been used, you can edit or delete it. However, once a consignment item has used a given rate, those buttons will be greyed out. You can still add a new rate. The effective date for a new rate must be later than the last date (no inserting a new rate into the middle of the history).

Manage Dealer rates

Dealer Name: Heritage Antiques
Dealer Representative: Mike Nazzaro, Owner
Address: 39 E. Patrick Street Frederick MD 21701
Telephone: 301-668-0299 BUSINESS

Rate Listing

A rate cannot be edited or deleted once a consignment item in the system is affected by it
(The Date of Possession is later than the Effective Date for that rate).

Rate/Method	Effective Date	Commands
0.4 40% (Percentage)	2011-01-01	[Edit] [Delete] (1847 existing items)
0.45 45% (Percentage)	2015-01-01	[Edit] [Delete] (5 existing items)
5.00 $5.00 (Flat Fee)	2016-01-01	[Edit] [Delete] (3 existing items)

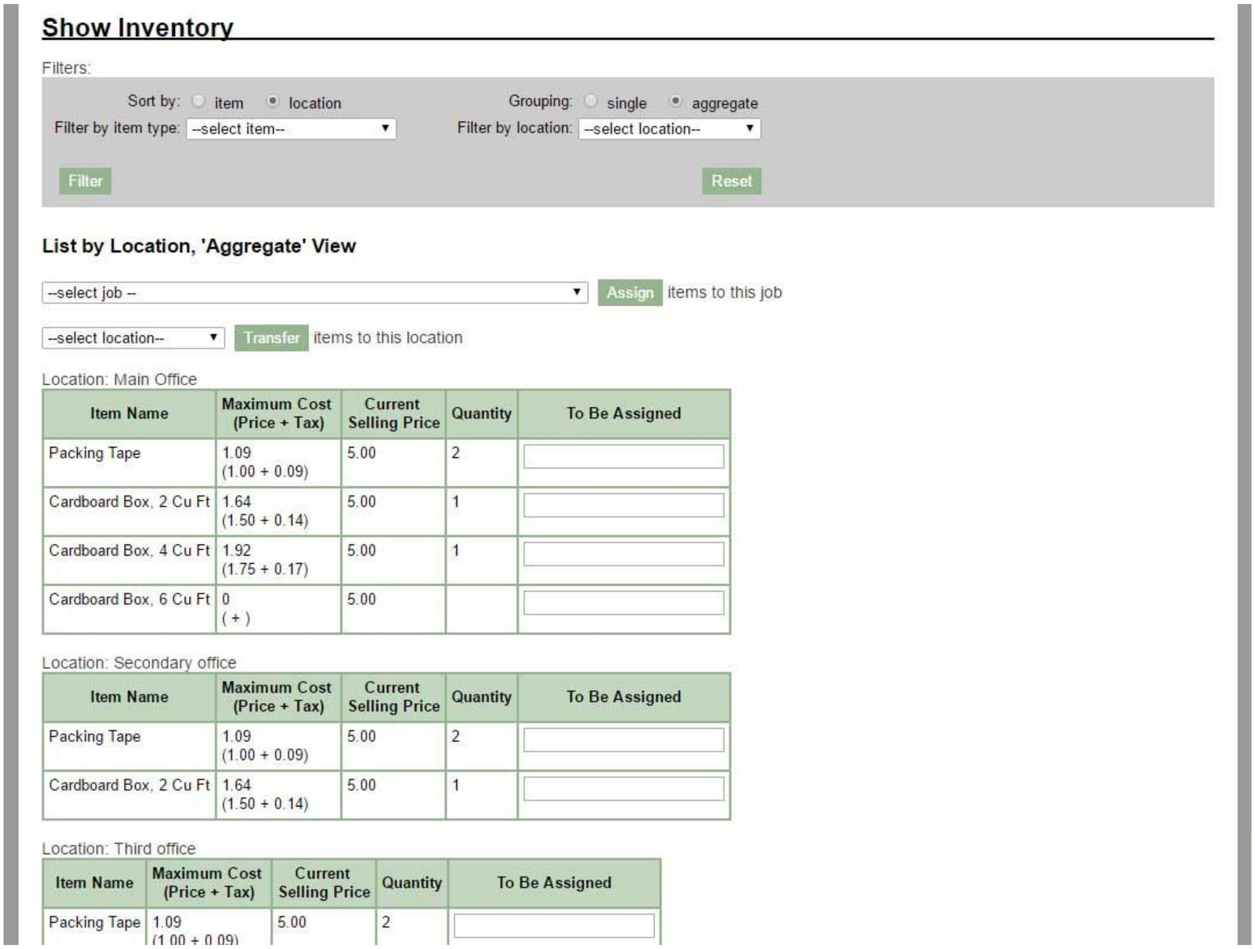
ADD NEW RATE

START OVER

Inventory

Show Inventory

This command lets you see what is presently in stock.



Show Inventory

Filters:

Sort by: item location Grouping: single aggregate

Filter by item type: --select item-- Filter by location: --select location--

Filter Reset

List by Location, 'Aggregate' View

--select job -- Assign items to this job

--select location-- Transfer items to this location

Location: Main Office

Item Name	Maximum Cost (Price + Tax)	Current Selling Price	Quantity	To Be Assigned
Packing Tape	1.09 (1.00 + 0.09)	5.00	2	
Cardboard Box, 2 Cu Ft	1.64 (1.50 + 0.14)	5.00	1	
Cardboard Box, 4 Cu Ft	1.92 (1.75 + 0.17)	5.00	1	
Cardboard Box, 6 Cu Ft	0 (+)	5.00		

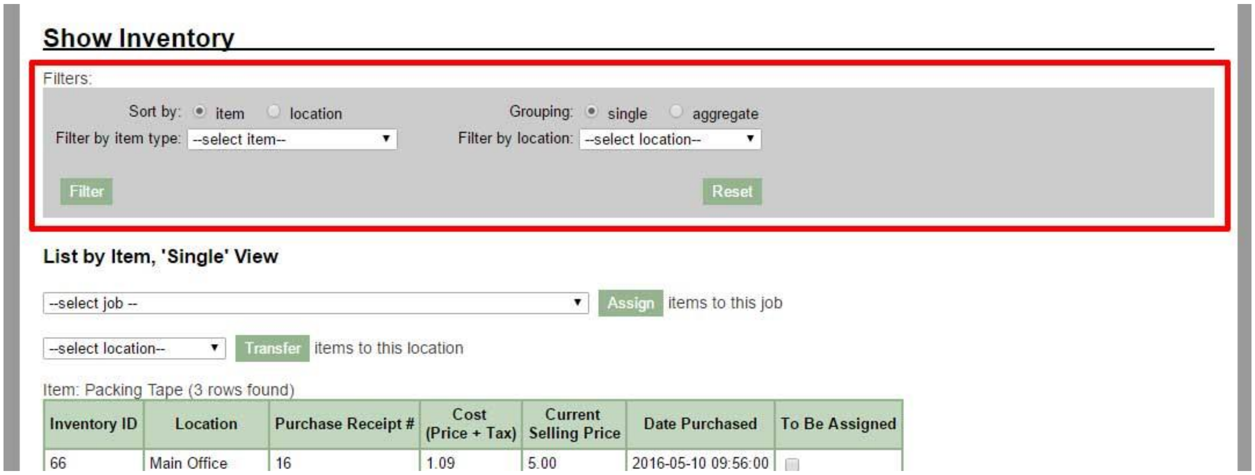
Location: Secondary office

Item Name	Maximum Cost (Price + Tax)	Current Selling Price	Quantity	To Be Assigned
Packing Tape	1.09 (1.00 + 0.09)	5.00	2	
Cardboard Box, 2 Cu Ft	1.64 (1.50 + 0.14)	5.00	1	

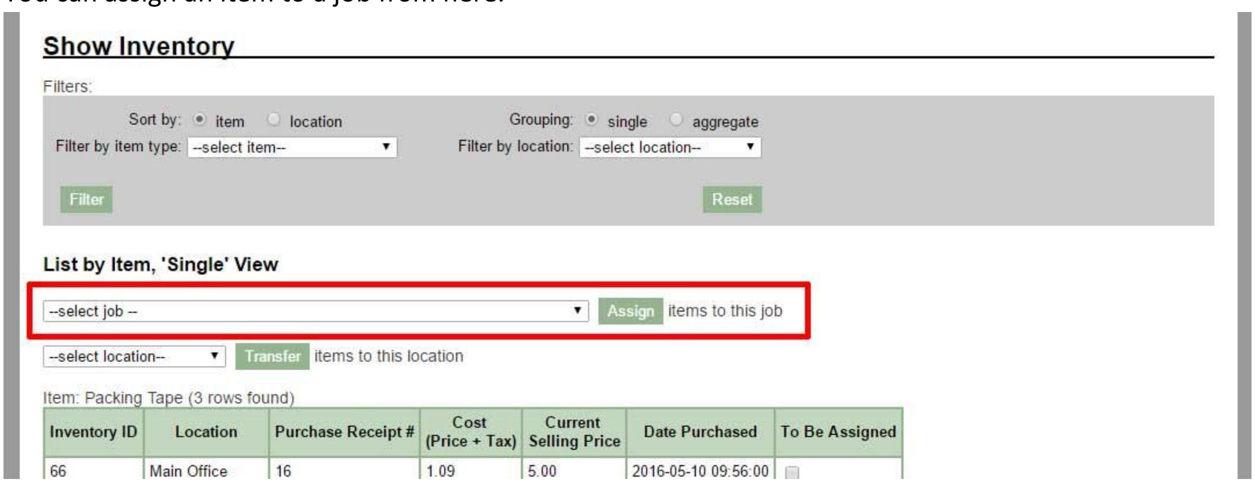
Location: Third office

Item Name	Maximum Cost (Price + Tax)	Current Selling Price	Quantity	To Be Assigned
Packing Tape	1.09 (1.00 + 0.09)	5.00	2	

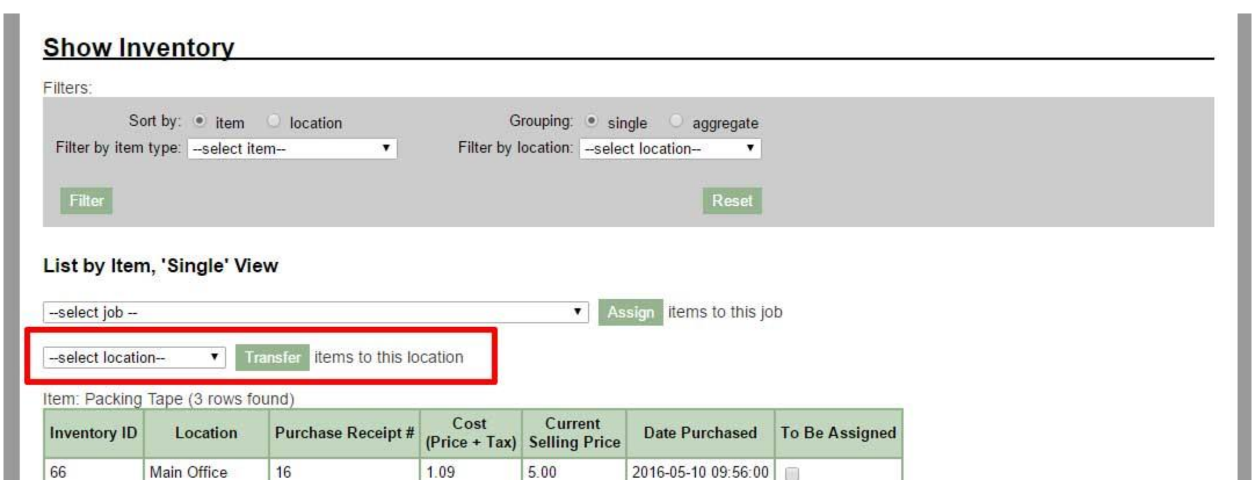
You can filter the listing based on item type, or item location, and you can also sort the results by item or by location. You can display each item with the 'single' setting (two identical boxes means two line items quantity 1 per line item), or more commonly, you can aggregate the results (two identical boxes show in one line item with a quantity of 2).



You can assign an item to a job from here.



Or you can transfer it from one location to another.



Record Purchases

When you make a purchase it is common for it to consist of multiple item types. This command lets you tell the system that a purchase has been made, and what items were part of it.

The first screen shows a listing of purchases that have been made.

Record Purchases

List Previous Purchases

Record A Purchase

3 purchase receipts found.

Purchase ID	Purchase Name	Description	Buyer	Purchase Total Amt	Purchase Other Amt	Sales Tax Total	Sales Tax %	Purchase Date	Commands
14	okey dokey	Hopefully think the inventory items are in good shape now.		42.00	0.00	10.00	5.25	2016-04-12 14:58:00	Edit Delete
15	sdf	sdffd sd	Suzanne Mozart	110.00	67.00	10.00	10.00	2016-04-11 14:35:00	Edit Delete
16	test data	Adding test data for use with the Inventory job assignment and transfer commands.	Alan Nikkel	29.01	0.00	2.51	9.47	2016-05-10 09:56:00	Edit Delete

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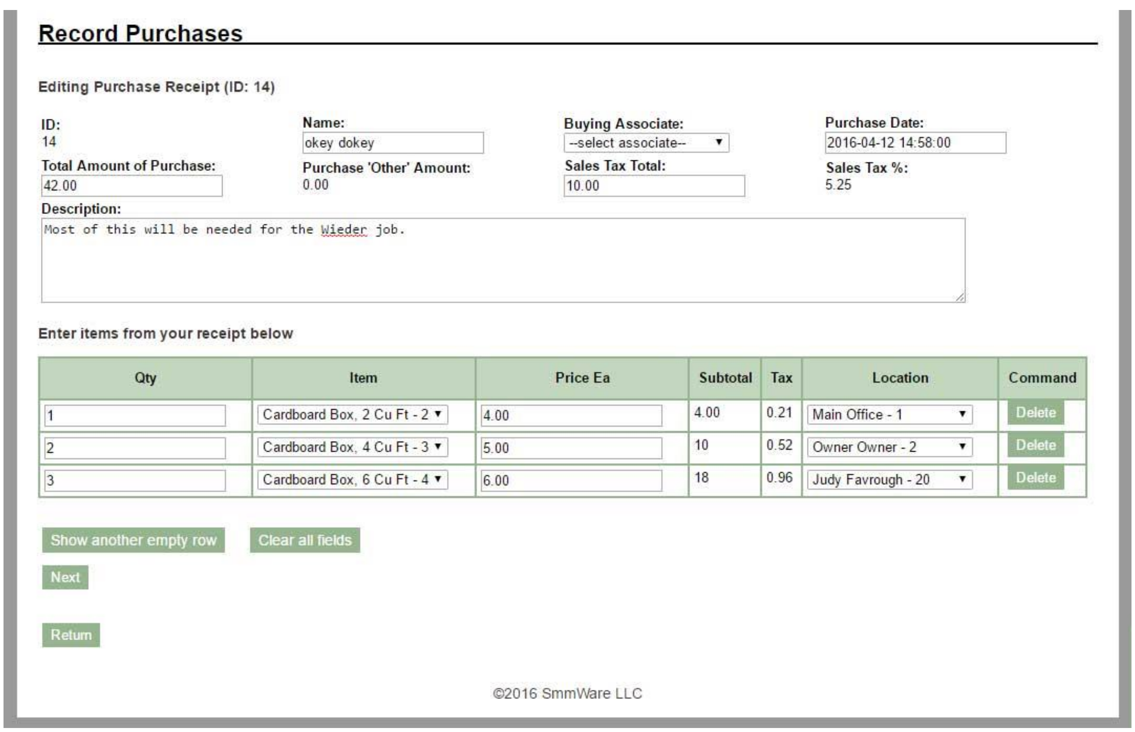
The second screen lets you enter the details. You will assign the items to an inventory location.



Record Purchases

Editing Purchase Receipt (ID: 14)

ID: 14

Name: okey dokey

Buying Associate: --select associate--

Purchase Date: 2016-04-12 14:58:00

Total Amount of Purchase: 42.00

Purchase 'Other' Amount: 0.00

Sales Tax Total: 10.00

Sales Tax %: 5.25

Description:

Most of this will be needed for the Wieder job.

Enter items from your receipt below

Qty	Item	Price Ea	Subtotal	Tax	Location	Command
1	Cardboard Box, 2 Cu Ft - 2	4.00	4.00	0.21	Main Office - 1	Delete
2	Cardboard Box, 4 Cu Ft - 3	5.00	10	0.52	Owner Owner - 2	Delete
3	Cardboard Box, 6 Cu Ft - 4	6.00	18	0.96	Judy Favrough - 20	Delete

Show another empty row Clear all fields

Next

Return

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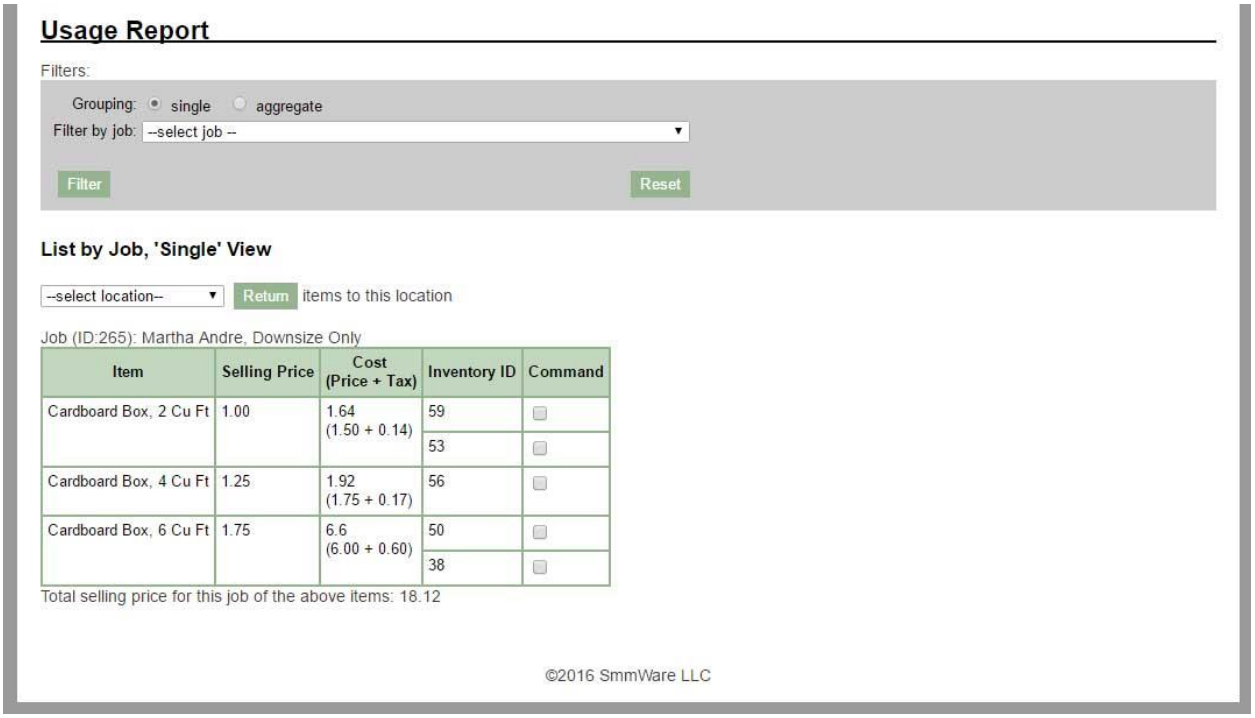
Usage Report

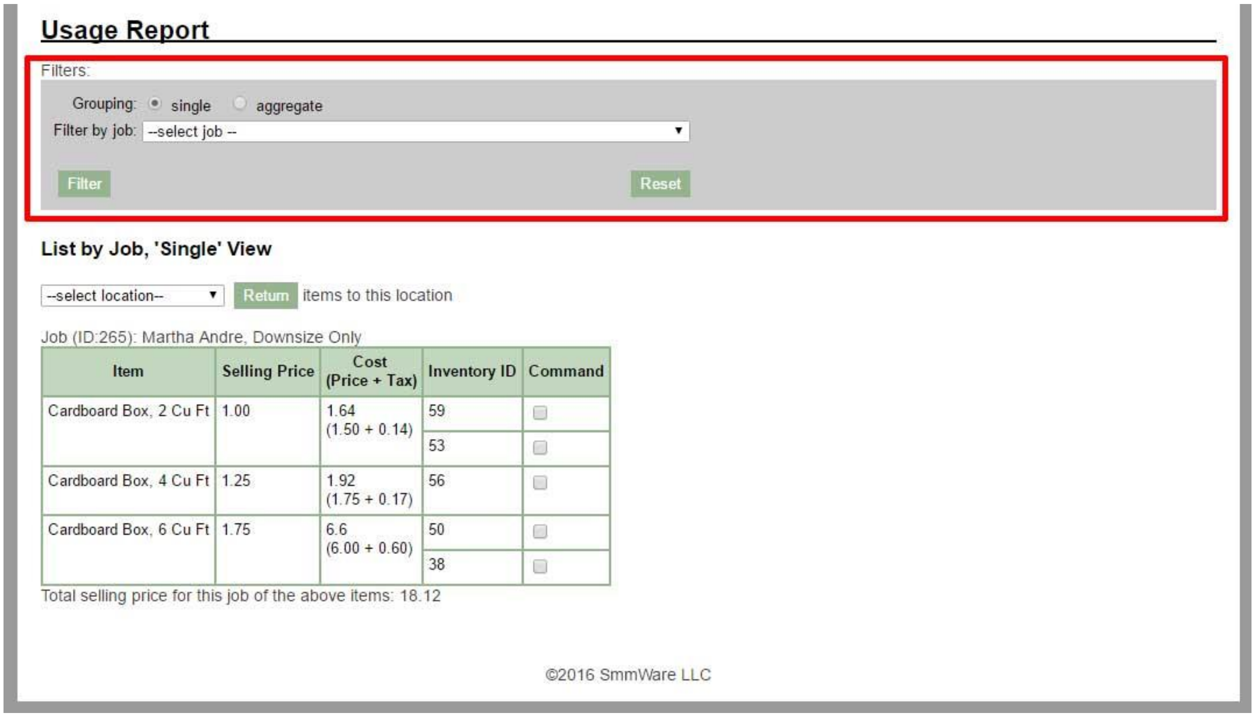
This command lets you see what inventory items have been assigned to a job.

You can also return items to stock if needed.

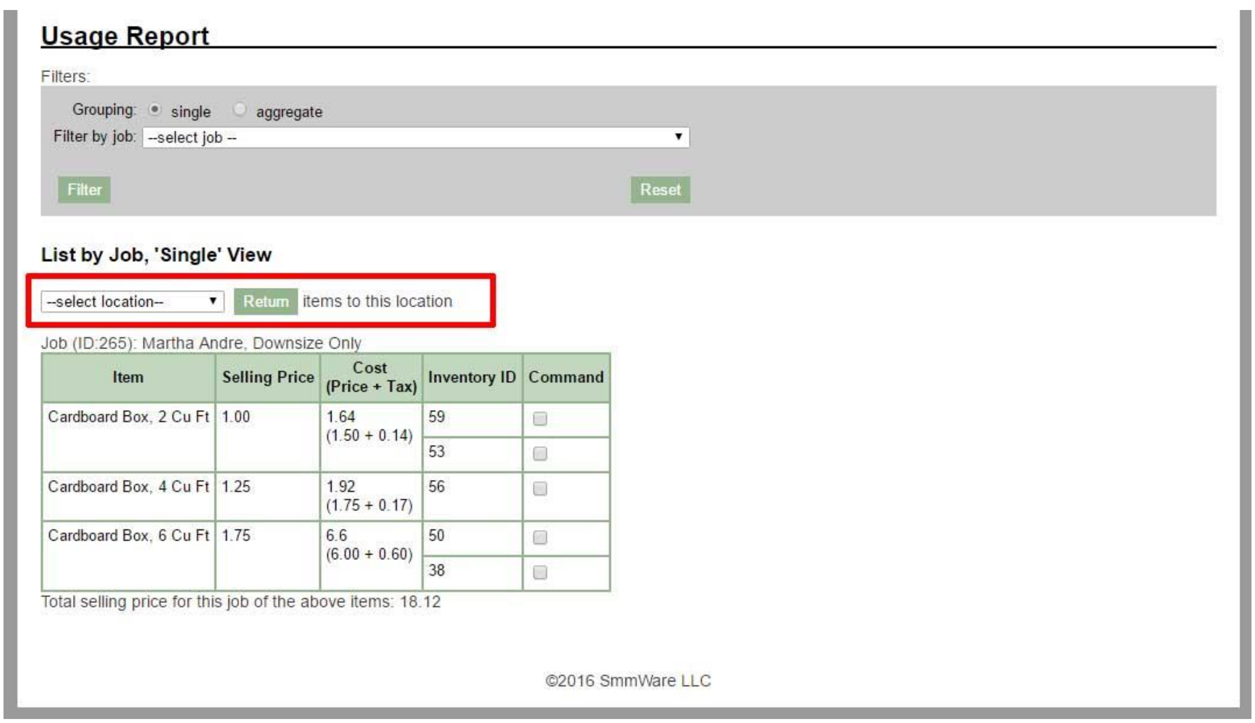


The filter at the top of the page lets you narrow the listing based on the job. The list of items can be displayed by distinct item, or in groups. The 'single' setting means that if the job has two of an item such as a 2Cu Ft cardboard box, there will be a line item for each box. You can pick exactly which box is being returned to stock. This is relevant if the boxes were bought at different times for different prices.

The 'group' setting is more common than 'single' because it is rare that you care about exactly which item is transferred. Under the group setting, you will see an overall number for this item, and can return a portion back to stock (if desired).



You can also return items back into inventory if you need to correct an error.



Manage Locations

This command allows you to add/edit/delete locations.

Note that there is a configuration option that lets you treat associates as inventory locations. If this is on, associates will appear in the list of available locations, but they don't require management and so don't appear here.

Manage Locations

Locations List

Add Location

4 locations found.

Location ID	Location Name	Location Description	Address	Commands
1	Main Office	This is a description for the main office inventory	123 Locations Test St Amherst, NY 14228	Edit Delete
2	Secondary office	This is the description for the secondary office	123 Some Street SomeCity, SomeState 12345	Edit Delete
3	Third office	This is the description for the third office	123 Some Street SomeCity, SomeState 12345	Edit Delete
4	Fourth office	This is the description for the fourth office	123 Some Street4 SomeCity4, SomeState4 12345	Edit Delete

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Manage Locations

Editing Location (ID: 1)

Name: Main Office

Description: This is a description for the main office inventory

Address: 123 Locations Test St

Address 2:

City: Amherst

State: NY

Zip: 14228

Status: Open

Next

Return

Manage Items

This command allows you to add/edit/delete the inventory items.

Manage Item Definitions

Items List

Add Inventory Item

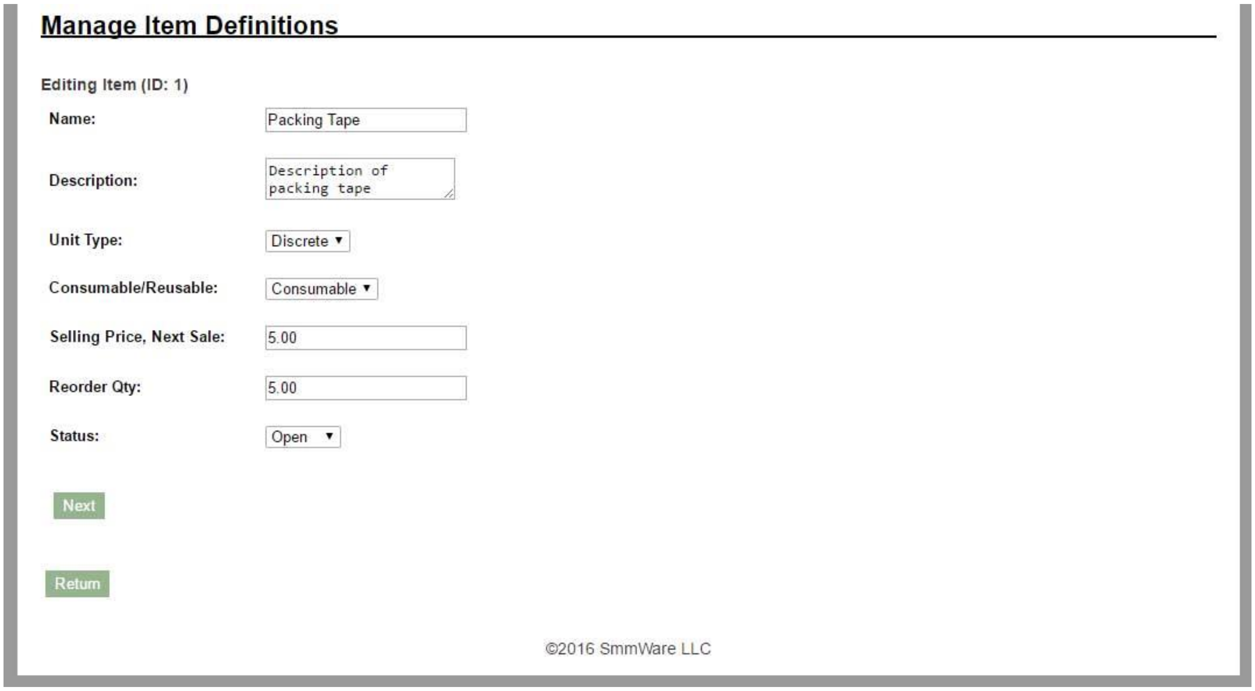
7 items found.

Item ID	Item Name	Description	Unit Type	Consumable / Reusable	Selling Price	Reorder Qty	Status	Commands
1	**Packing Tape**	Description of packing tape	discrete	consumable	5.00	5.00	Open	Edit Delete
2	**Cardboard Box, 2 Cu Ft**	This is the description of a 2 cu ft cardboard box	discrete	consumable	1.00	5.00	Open	Edit Delete
3	**Cardboard Box, 4 Cu Ft**	This is the description, 4 cu ft cardboard box	discrete	consumable	1.25	5.00	Open	Edit Delete
4	**Cardboard Box, 6 Cu Ft**	This is the description, 6 cu ft cardboard box	discrete	consumable	1.75	5.00	Open	Edit Delete
6	**Dolly**	Typical moving dolly	discrete	reusable	50.00	0.00	Open	Edit Delete
7	**Tie down straps**	This is a description of tie down straps	discrete	reusable	25.00	0.00	Open	Edit Delete
8	**Moving Blankets**	These protect furniture.	discrete	consumable	15.00	0.00	Open	Edit Delete

The most common type of inventory item is 'discrete', such as a box or a dolley.

An item can be designated as "Consumable" such as a cardboard box, or as "Reusable", like a dolley.

The status of an item can be "open" or "closed". Closed items cannot have any additional inventory assigned to it in the Record Purchases command.


Manage Item Definitions
Editing Item (ID: 1)
Name:
Packing Tape
Description:
Description of packing tape
Unit Type:
Discrete
Consumable/Reusable:
Consumable
Selling Price, Next Sale:
5.00
Reorder Qty:
5.00
Status:
Open
Next
Return
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Appendix A: A Listing of All SMMware YouTube Videos (at the time this doc was created)

If we upload a new version of a video, it will have a new URL replacing the ones provided below. You can still find the new version by going to our channel and then browsing through the videos.

Our YouTube channel: https://www.youtube.com/SMMware

Introduction to SMMware 2018	https://youtu.be/hiVHxWhWfFk
Sales Tools	https://youtu.be/ISBJKoaARFQ
SMMware on Mobile Devices	https://youtu.be/RdGgXphRewk
Clients and Jobs	https://youtu.be/XQ7OjgFsRa4
Associate Profiles	https://youtu.be/446Ar5kJaMM
Time and Expense Entry	https://youtu.be/764O2X2Z6Ag
Approval of Hourly/Expense/Mileage Items	https://youtu.be/rwNJ7RB20OU
Contacts and Organizations	https://youtu.be/-uLyIQrYk_0
Invoice Manager	https://youtu.be/Y4i-mYthAb4
Project Management: Tasks, Calls, & Notes	https://youtu.be/3xc5CqwsO5I
Task Groups	https://youtu.be/zxN580JBWeM
Schedule and Calendar (General intro)	https://youtu.be/vEGHnUDbWDk
Scheduling (Availability Based)	https://youtu.be/QkMukXOf_OQ
Quickbooks Online Integration	https://youtu.be/iXBXYqo__-o
Finding MailChimp api key and list IDs	https://youtu.be/5xRR8t1Zr_4
Exporting to Excel	https://youtu.be/VfZ6t5vWWAs
Reporting	https://youtu.be/1aorxpajPRU
Consignment Sales	https://youtu.be/LW3jQaOsVx4
Image and File Handling	https://youtu.be/CT5J00Kk2Kc
iPhone Desktop Shortcut (creating one)	https://youtu.be/36S4WjDZKVQ

