



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 be 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:

	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

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.

Powered By SMMware

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

Home >> Associates >> Record My Hours/Mileage Go

Logged on as: admin Log Out

Record My Hours/Mileage

--select associate --

Next

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.

Sunny Days Senior Move Managers Operations Database

Powered By SMMware

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

Home >> Associates >> Record My Expenses Go

Logged on as: admin Log Out

Record My Expenses

--select associate --

Next

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.

Date	Job	Fee	Description	Commands / Invoice #
January 01, 2018	(468) - In Home Services: Anchorman, Marion	\$50.00	Boxes for packing	Edit Delete


And existing entries are listed in the bottom section.

Date	Job	Fee	Description	Commands / Invoice #
January 01, 2018	(468) - In Home Services: Anchorman, Marion	\$50.00	Boxes for packing	Edit Delete

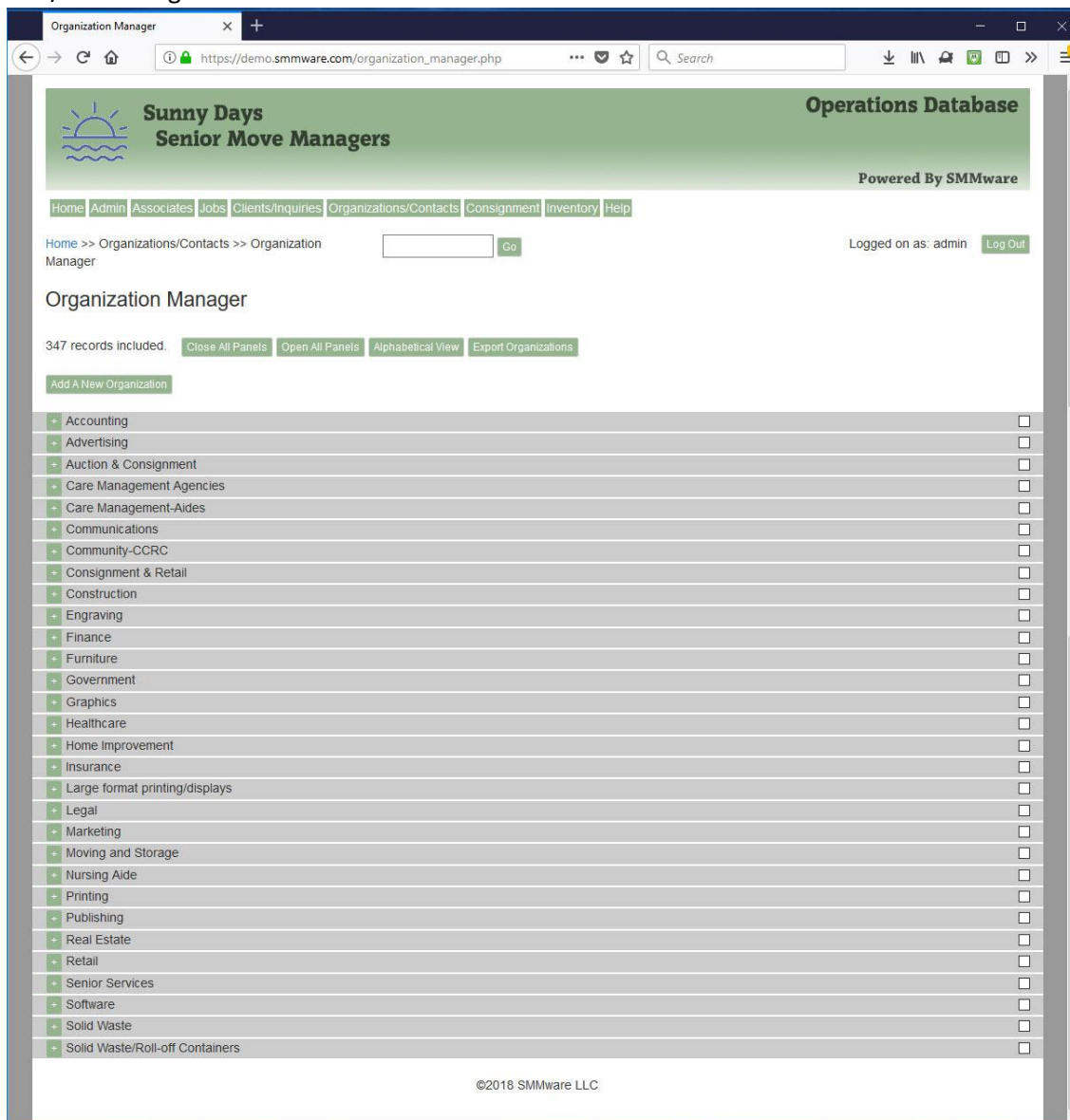
Flat Fees History Command

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/-uLylQrYk_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)
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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.



The screenshot shows a web browser window with the URL https://demo.smmware.com/organization_manager.php. The page header includes the logo for "Sunny Days Senior Move Managers" and "Operations Database", along with the text "Powered By SMMware". A navigation menu contains links for 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 displays a list of 347 records, with a button to "Add A New Organization". The list includes various categories such as Accounting, Advertising, Auction & Consignment, Care Management Agencies, Care Management-Aides, Communications, Community-CCRC, Consignment & Retail, Construction, Engraving, Finance, Furniture, Government, Graphics, Healthcare, Home Improvement, Insurance, Large format printing/displays, Legal, Marketing, Moving and Storage, Nursing Aide, Printing, Publishing, Real Estate, Retail, Senior Services, Software, Solid Waste, and Solid Waste/Roll-off Containers. Each category has a plus sign to expand it and a checkbox to the right. The footer of the page contains the copyright notice "©2018 SMMware LLC".

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

Organization Manager

Add | Edit

Save Return to Listing Delete This Organization QBO Add

Organization Name*: Calvary Accounting (ID: 357)

Organization Category (Hold CTL or SHIFT Key for multi-select):
--select categories--
Accounting
Advertising
Auctions
Care Management Agencies
Care Management-Aides

Address 1: 123 Calvary Court Address 2: City: Oak Park State: CO Zip: 54321 Country:

Phone 1: 321 321 4321 Description 1: d1 Phone 2: 321 321 4322 Description 2: d2

Website: www.calvary.com QBO Vendor: Parent Organization: A Place for Mom (ID: 113)

Notes:

File Edit View Insert Format

← → Formats **B** *I*

POWERED BY TINYMCE

Organization contacts: None found

Save Return to Listing Delete This Organization

+ File Manager (0 files found)

+ Tasks For This Organization (0 tasks found)

+ Notes For This Organization (0 notes found)

+ Calls For This Organization (0 calls found)

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

The screenshot shows the 'Organization Manager' form. The 'Organization Name' field contains 'Calvary Accounting' (ID: 357). The 'Organization Category' dropdown menu is open, showing a list of categories: Accounting, Advertising, Auctions, Care Management Agencies, and Care Management-Aides. The 'QBO Vendor' checkbox is checked. The form includes fields for Address 1, Address 2, City, State, Zip, and Country, as well as Phone 1, Phone 2, Description 1, and Description 2. A rich text editor is visible at the bottom.

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.

This screenshot is a close-up of the 'QBO Vendor' checkbox, which is checked. The checkbox is highlighted with a red box. The surrounding fields include 'Phone 1', 'Description 1', 'Phone 2', and 'Description 2'.

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

This screenshot shows the 'Parent Organization' dropdown menu, which is highlighted with a red box. The dropdown menu is open, showing a list of organizations: Accounting, Advertising, Auction & Consignment, Care Management Agencies, and Care Management-Aides. The 'Parent Organization' field is set to 'A Place for Mom (ID: 113)'. The 'QBO Vendor' checkbox is also checked.

Contacts

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



Contact Manager

551 records included [Close All Panels](#) [Open All Panels](#) [Alphabetical View](#) [Export Contacts](#)

[Add A New Contact](#)

+	Accounting	<input type="checkbox"/>
+	Advertising	<input type="checkbox"/>
+	Auction & Consignment	<input type="checkbox"/>
+	Care Management Agencies	<input type="checkbox"/>
+	Carpentry	<input type="checkbox"/>
+	Charities & Thrift Stores	<input type="checkbox"/>
+	Client Family	<input type="checkbox"/>
+	Communications	<input type="checkbox"/>
+	Computer	<input type="checkbox"/>
+	Consignment & Retail	<input type="checkbox"/>
+	Finance	<input type="checkbox"/>
+	Furniture	<input type="checkbox"/>
+	Government (local)	<input type="checkbox"/>
+	Government (state)	<input type="checkbox"/>
+	Graphics	<input type="checkbox"/>
+	Hauling & Solid Waste	<input type="checkbox"/>
+	Health Services	<input type="checkbox"/>
+	Home Improvement	<input type="checkbox"/>
+	Inquiries	<input type="checkbox"/>
+	Insurance	<input type="checkbox"/>
+	Interior Design	<input type="checkbox"/>
+	Landscaping	<input type="checkbox"/>
+	Legal	<input type="checkbox"/>
+	Locksmith	<input type="checkbox"/>
+	Marketing	<input type="checkbox"/>
+	Medical	<input type="checkbox"/>
+	Moving and Storage	<input type="checkbox"/>
+	Non-profit Organization	<input type="checkbox"/>
+	Physical Therapy	<input type="checkbox"/>
+	Printing	<input type="checkbox"/>
+	Publishing	<input type="checkbox"/>
+	Real Estate	<input type="checkbox"/>
+	Recycling and Shredding	<input type="checkbox"/>
+	Rehabilitation & Physical Therapy	<input type="checkbox"/>
+	Retail	<input type="checkbox"/>
+	Senior Housing	<input type="checkbox"/>
+	Senior Services	<input type="checkbox"/>
+	Social Work	<input type="checkbox"/>
+	Solid Waste	<input type="checkbox"/>
+	Used Books	<input type="checkbox"/>
+	Utilities	<input type="checkbox"/>
+	Writing & Editing	<input type="checkbox"/>

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

Click on 'Edit' to open a profile.

Contact Manager

Add | Edit
Save Return to Listing Delete This Contact
ID: 741 Note: This Contact does not represent any clients

First Name*: Harry Last Name*: Houdini Title: Magician
Email: test@test.com Last Contacted: Favorites (courtesy):
Additional Contact Detail: Courtesy's

File Edit View Insert Format
← → Formats B I

This is the detail

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Organization Affiliation: A One Moving & Storage (ID) Act as Client Rep: Refers Business to Us:
Copy organization info

If this contact is affiliated with an organization, you can copy the organization's address/phone/website info into the fields below.
To do so, click the "Copy Org Info" button. If you change the Organization info, you'll probably want to 'copy' the org info again to update.

Address 1: TestAddress1	Address 2: TestAddress2	City: TestCity	State: FL	Zip: 14228	Country:
Phone 1: 301-846-7747-	Description 1: Home	Phone 2: (123)123-1234	Description 2: Cell3	Web Site: www.stuff.com	

Save Return to Listing

+ File Manager (13 files found)
+ Tasks For This Contact (0 tasks found)
+ Notes For This Contact (0 notes found)
+ Calls For This Contact (0 calls found)

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

Organization Affiliation: A One Moving & Storage (ID) Act as Client Rep: Refers Business to Us:
Copy organization info

Category (Hold CTL or SHIFT key for multi-select):
--select categories--
Accounting
Advertising
Auctions
Care Management Agencies
Care Management-Aides

If this contact is affiliated with an organization, you can copy the organization's address/phone/website info into the fields below.

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

The screenshot shows a contact profile form with the following fields: ID: 74, Note: This Contact does not represent any clients (highlighted in a red box), First Name*: Harry, Last Name*: Houdini, Title: Magician, Email: test@test.com, Last Contacted: (empty), Favorites (courtesy): Courtesy's, and Additional Contact Detail: (empty). A menu bar at the bottom includes File, Edit, View, Insert, and Format.

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.

The screenshot shows an organization selection form with the following fields: Organization Name*: Calvary Accounting (ID: 357) (highlighted in a red box), Organization Category (Hold CTL or SHIFT Key for multi-select): Accounting, Advertising, Auctions, Care Management Agencies, Care Management-Aides, Address 1: 123 Calvary Court, Address 2: (empty), City: Oak Park, State: CO, Zip: 54321, Country: (empty), Phone 1: 321 321 4321, Description 1: d1, Phone 2: 321 321 4322, Description 2: d2, Website: www.calvary.com, OBO Vendor: (checked), Parent Organization: A Place for Mom (ID: 113). Buttons at the top include Save, Return to Listing, Delete This Organization, and QBO Add.


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.

The screenshot shows a contact profile form with the following fields: Organization Affiliation: A One Moving & Storage (ID: (empty)), Act as Client Rep: , Refers Business to Us: (highlighted in a red box), Category (Hold CTL or SHIFT Key for multi-select): Accounting, Advertising, Auctions, Care Management Agencies, Care Management-Aides. A button labeled “Copy organization info” is visible. A note at the bottom states: “If this contact is affiliated with an organization, you can copy the organization's address/phone/website info into the fields below.”

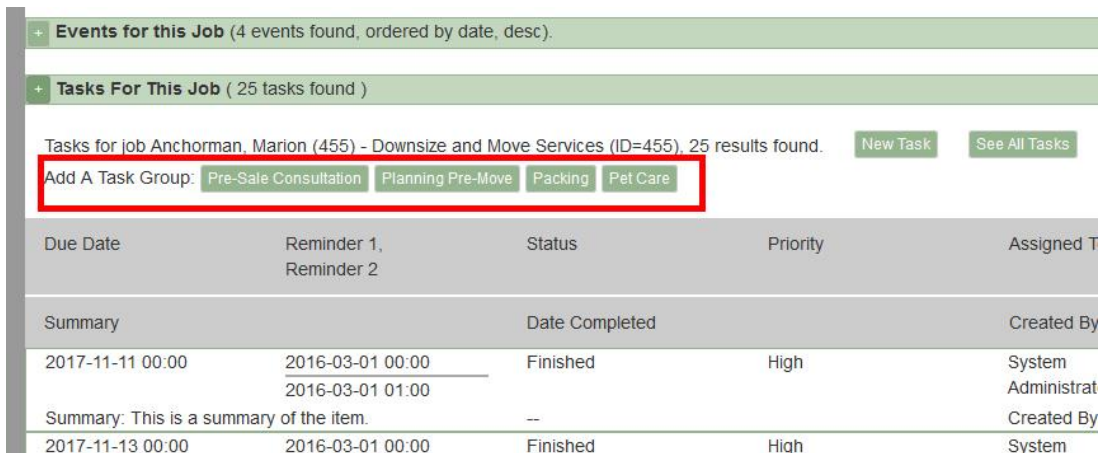
Tasks / Calls / Notes, and Homepage Sections

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)
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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.




The screenshot shows a task management interface. At the top, there are two green headers: '+ Events for this Job (4 events found, ordered by date, desc.)' and '+ Tasks For This Job (25 tasks found)'. Below the second header, there is a text line: 'Tasks for job Anchorman, Marion (455) - Downsize and Move Services (ID=455). 25 results found.' To the right of this text are two buttons: 'New Task' and 'See All Tasks'. Below this is a red-bordered box containing the text 'Add A Task Group:' followed by four buttons: 'Pre-Sale Consultation', 'Planning Pre-Move', 'Packing', and 'Pet Care'. Below the red box is a table with columns: 'Due Date', 'Reminder 1, Reminder 2', 'Status', 'Priority', and 'Assigned To'. The table contains several rows of task data, including dates, reminders, status (Finished), priority (High), and created by (System Administrator).

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)
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Homepage Sections



Sunny Days Senior Move Managers

Operations Database

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

Home Go
Logged on as: tbackus Log Out

Daily Snapshot

You are now logged in as tbackus

- + My Tasks (3 tasks)
- + All Unfinished Tasks (37 tasks)
- + Tasks Recently Completed (0 tasks)
- + My Calls (0 calls)
- + Invoices Needing My Approval (0 invoices)
- + Hourly & Expense Items Needing Approval (0 item)
- + My Hourly & Expense Items Needing Revision (0 items)
- + My Teams, As Lead (1 job)
- + My Teams, As Member (2 jobs)
- + My Schedule

Previous Today Next
Monthly View Weekly View Daily View

July 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5 1p - 3p Marion Anchorman, Organizing	6	7
8	9	10 9a - 11a We will ha...	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Key:

Job
Client
Associate
Company
Available
Custom1
Custom2
Custom3
Custom4
Custom5

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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

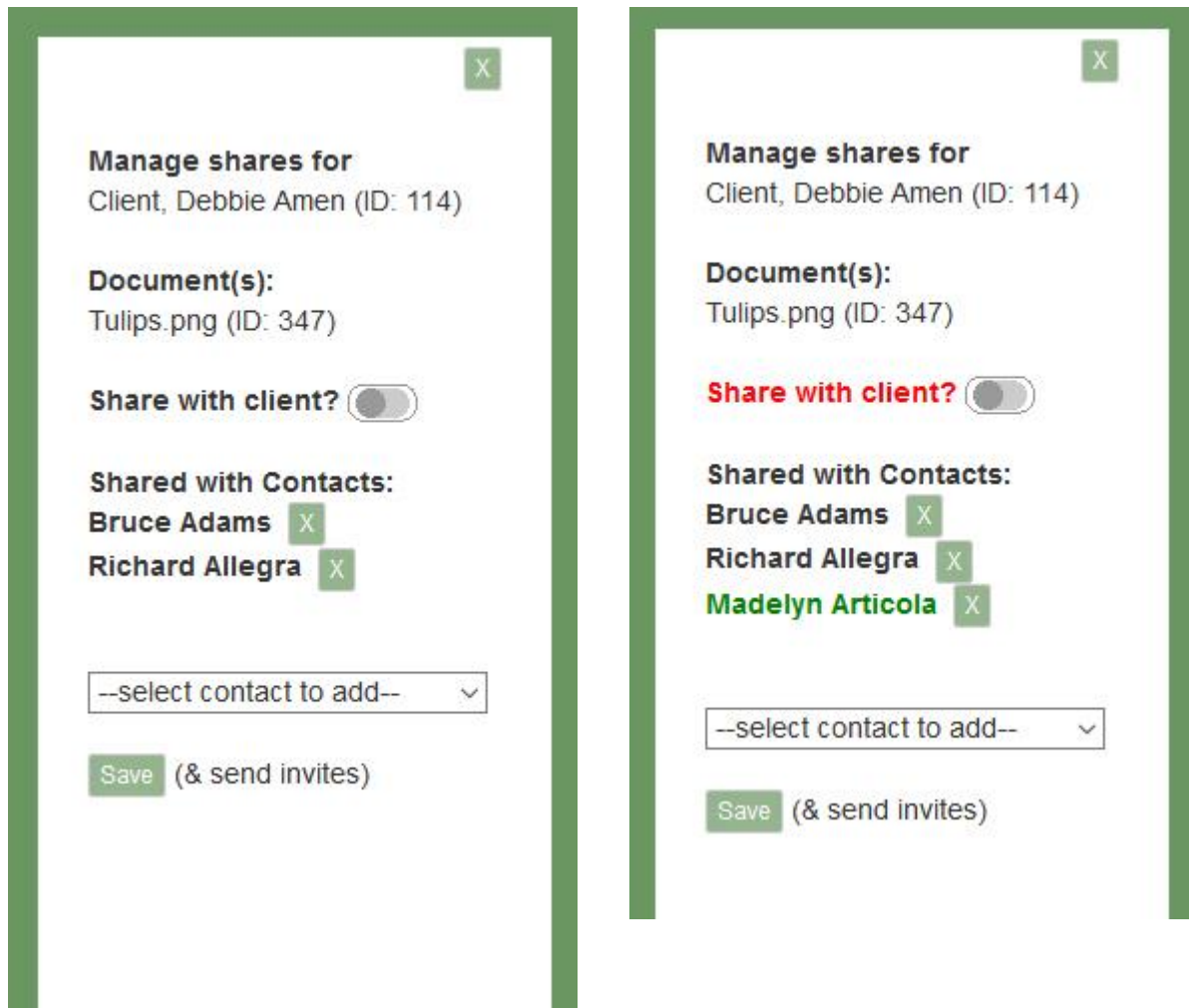
Shares are created from the File Manager in Client and Job Profiles. To start, you click on the 'share' icon (). The icon at the top lets you share the whole folder.



Clicking on the share icon brings up the 'share' screen.

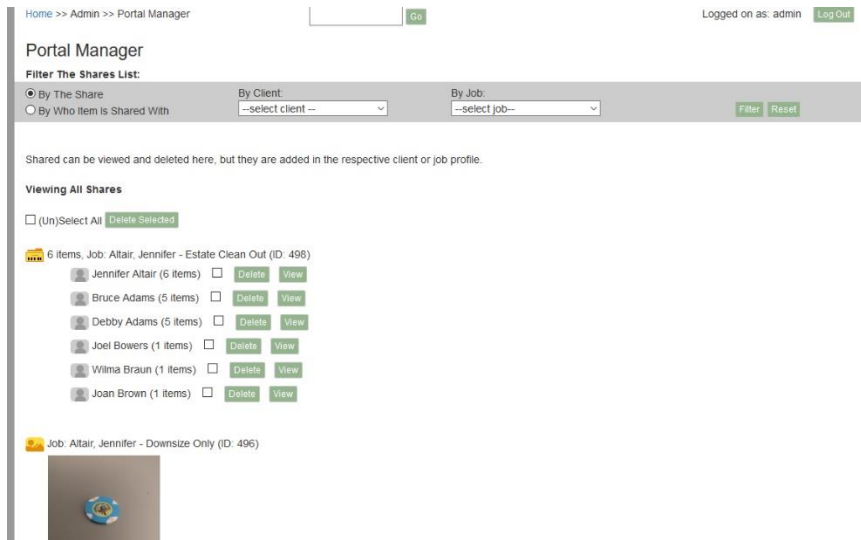
As seen in the left pane below, you can share the document with the client using the slider. Since SMMware knows who the client is and their email address, you simply need to decide yes/no.

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.

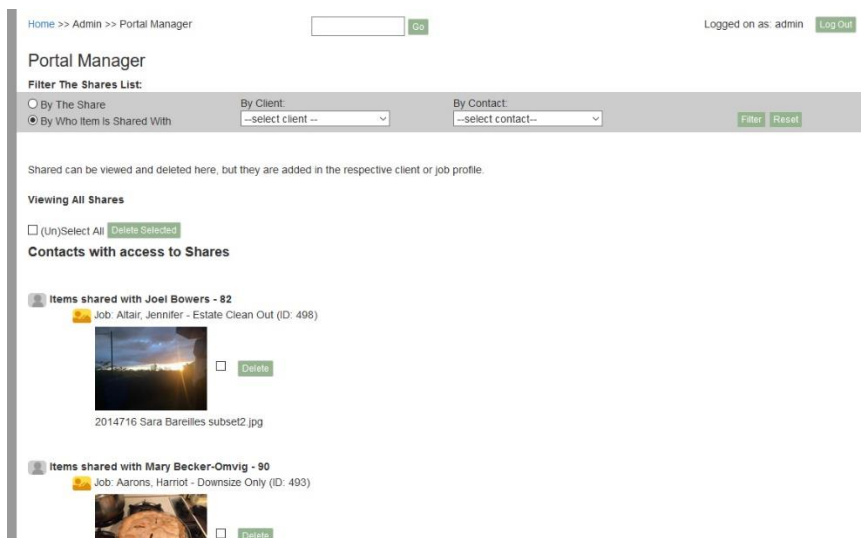


SMMware also provides you with a new command, the Portal Manager, found under Admin->Portal Manager. The filter section at the top in the grey bar allows you to group the listing in two ways.

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.

	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)
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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.

Hours Expenses Mileage Approval

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

Select Job: April, Joan (398) - Move Only Start Date: End Date: Include Already Approved Items? Yes Filter Reset

Report generated: 01-19-2018 14:53:55
1 records used

Client: Joan April
Job: Move Only (ID: 398)
Job Status: Active
Client Fee Model: One Rate Per Job
Job Begin Date: 2014-07-26
Billing Rate: \$55.00 per hour

Date Worked	Associate Name (ID)	Service Performed / Expense Description	Expense Amount	Hours	Approved By	Check to Approve
04/04/17	Johannes Bach (ID: 36)	Preset 4	\$4.00	0	--	<input type="checkbox"/>

Approve Checked Items

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".

Home >> Admin >> Hours Expenses Mileage Approval [Go] Logged on as: admin [Log Out]

Hours Expenses Mileage Approval

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

Select Job: April, Joan (398) - Move Only Start Date: End Date: Include Already Approved Items? Yes Filter Reset

Report generated: 01-19-2018 14:50:41
3 records used

Client: Joan April
Job: Move Only (ID: 398)
Job Status: Active
Client Fee Model: One Rate Per Job
Job Begin Date: 2014-07-26
Billing Rate: \$55.00 per hour

Date Worked	Associate Name (ID)	Service Performed / Expense Description	Expense Amount	Hours	Approved By	Check to Approve
07/25/14	Nisa Bloor (ID: 14)	Unpack and set-up services	\$0.00	10.50	System Administrator	<input checked="" type="checkbox"/>
07/25/14	Devin Osbourn (ID: 62)	Unpack and Set-up	\$0.00	10.50	System Administrator	<input checked="" type="checkbox"/>
04/04/17	Johannes Bach (ID: 36)	Preset 4	\$4.00	0	--	<input type="checkbox"/>

Update Items

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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.

The screenshot shows a 'Daily Snapshot' dashboard with several sections. A red box highlights the 'Hourly & Expense Items Needing Approval' section, which contains a table of items needing approval.

Hourly & Expense Items Needing Approval (5 items found)	
<i>These are jobs with hourly and expense entries needing approval.</i>	
Job 398 Joan April, Move Only	3 items
Job 470 Marilyn Anchorman, Move Only	2 items

Invoice Manager

	<p>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)</p>
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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 Manager

Filter The Invoice List:

Client: Job:

Date Range:

Create A New Invoice:

Invoice List

9 invoices found.

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	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
16-1023	2016-06-10	Marilyn2 Ackerman (398), Downsize and Move Services (455)	2010-06-06 2016-06-13	\$4,243.85	preliminary		<input type="button" value="Edit"/> <input type="button" value="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	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
16-1021	2016-06-07	Alberta Child (240), Downsize and Move Services (266)	2013-03-01 2013-03-31	\$6,234.00	preliminary		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
16-1020	2016-06-07	Vicki Berman (312), Downsize and Move Services (350)	2014-02-01 2014-02-28	\$1,833.00	preliminary		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
16-1018	2016-06-07	Vicki Berman (312), Downsize and Move Services (350)	2014-01-01 2014-01-31	\$852.00	preliminary	test	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
16-1017	2016-06-07	Ina Becham (27), Downsize and Move Services (78)	2013-01-01 2016-06-09	\$500.00	preliminary	test	<input type="button" value="Edit"/> <input type="button" value="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	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="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	<input type="button" value="Edit"/> <input type="button" value="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:

Filter The Invoice List:

Client: --select client -- Job: --select job -- Dates:

11 invoices found.

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 List

9 invoices found.

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	test	<input type="button" value="Edit"/> <input type="button" value="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.

Status

- TL_approved
- Preliminary
- Finalized
- TL_approved
- Sent To Client
- Overdue
- Paid

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	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
16-1017	2016-06-07	Ina Becham (27), Downsize and Move Services (78)	2013-01-01 2016-06-09	\$500.00	preliminary	test	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
16-1016	2016-06-03	Marilyn2 Ackerman (398), Downsize and Move Services (455)	2016-06-06 2016-06-09	\$500.00	finalized	test e e e	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="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	<input type="button" value="Edit"/> <input type="button" value="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
 Custom Suffix: test2
 Date Created: 2017-03-01

Invoice Type: Itemized
 Status: TL_approved

Start Date: 2013-03-01
 End Date: 2013-03-31
 Invoice Amount: \$6,234.01

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

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

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.

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.

— Your Logo Here —

[Home](#) | [Admin](#) | [Associates](#) | [Jobs](#) | [Clients/Inquiries](#) | [Organizations/Contacts](#) | [Customer Relations](#) | [Consignment](#) | [Inventory](#) | [Help](#)

Home >> Admin >> Invoice Summary Report Logged on with username: admin [Log Out](#)

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: <input type="text" value="--all jobs--"/>	Beginning Date (Optional): <input type="text" value="Click to Select Date..."/>	Ending Date (Optional): <input type="text" value="Click to Select Date..."/>
Include Closed Jobs? <input type="checkbox"/> yes	Only Overhead Jobs? <input type="checkbox"/> yes	Invoicing Status: <input type="text" value="All items"/>
		<input type="button" value="Filter"/> <input type="button" value="Reset"/>

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

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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: Meeks, Maria Victoria (463) - Downsize and Move	Beginning Date (Optional): Click to Select Date...	Ending Date (Optional): Click to Select Date...
Include Closed Jobs? <input type="checkbox"/> yes	Only Overhead Jobs? <input type="checkbox"/> yes	Invoicing Status: 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. Downsize 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 knickknacks 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.

	<p>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)</p>
-----------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

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 at 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.

Master Calendar

Add New

Previous Today Next

June 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		10a - 2p We'll be w...	9:30a - 3p Celeste Bartyn, Move Only Who: JB, NB, JE			
2	3 9a - 5p Joan April, Downsize and Move Services Who: SA, 1p - 3:30p Sandie Benson, Move Only Who: JB, NB	4	5	6 9:30a - 5p Sandy Barzeman, Estate Clean Out Who: SB, JE, BS	7 10:30a - 1p Elin Farkus, Downsize and Move Services Who: SA, NB	8
9	10	11 9a - 5p Joan April, Move Only Who: NB, JE, BS 9a - 4p Marion Anchorman, Downsize Only Who: RB, SB, JB	12 9a - 12p Caroline Burhans, Move Only Who: JB, NB, JE	13 9:30a - 5p Caroline Burhans, Move Only Who: BS, JE, RB, SB	14 9a - 3p Marion Anchorman, Organizing Who: RB, SB, JB 10:30a - 6p We'll be...	15
16	17	18 10:30a - 3p June Dunkers, Downsize Only Who: SA, JB, SB, JE	19 8a - 2p Joan April Who: NB	20	21 10a - 2p Vicki Berman, Downsize and Move Services Who: JB, SB, RB, NB, BS	22 8a - 8p Marion Anchorman, Downsize Only 9a - 6:30p Margaret Bauer, Downsize Only Who: GG, SA, BS 10:30a - 5:30p Marion Anchorman, Downsize and Move Services Who: NB
23 9a - 5p Joan April, Downsize and Move Services Who: BS	24 10a - 3p Joe Darkis, Downsize and Move Services Who: SA, JB, SB, NB, JE	25 10a - 4:30p Marion Anchorman, Downsize and Move Services Who: BS, JE 11a - 12p Bella Barner	26 9:30a - 1p Bella Barner, Downsize Only Who: NB	27	28	29

Key:

Job Client/Inqry Associate Company Custom1 Custom2 Custom3 Custom4 Custom5 Custom6

Pick only one dropdown to filter against

Filter By Job

--select job--

Filter By Client

--select client--

Filter By Associate

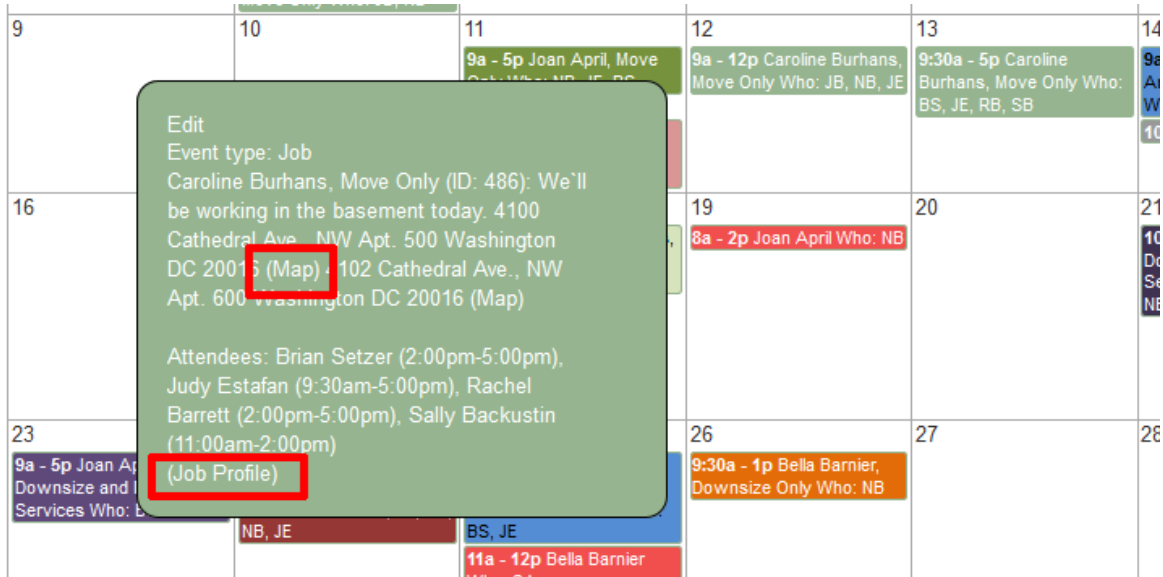
--select associate--

Filter Events

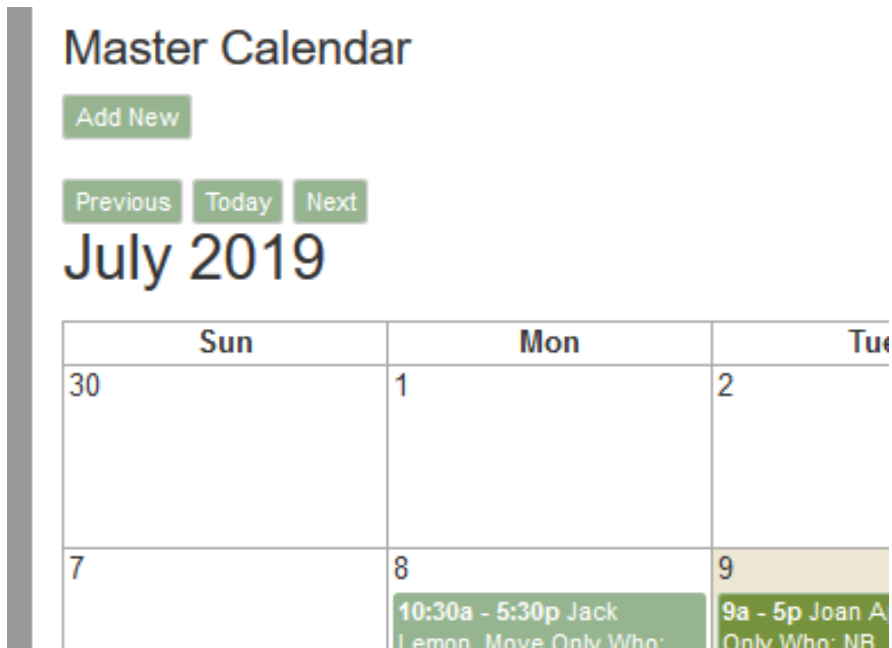
Reset Filter

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.

Sun	Mon	Tue	Wed	Thu
		10a - 2p We'll be w...	9:30a - 3p Celeste Bartlyn, Move Only Who: JB, NB, JE	
2	3 9a - 5p Joan April, Downsize and Move Services Who: SA 1p - 3:30p Sandie Benson,	4	5	6 9:30a - 5p Bartzema Out Who:
9	<div style="border: 1px solid green; padding: 5px;"> Edit Event type: Job Sandie Benson, Move Only (ID: 482): We'll be working in the basement today. They have cats, take your pills if you are allergic! 39140 Ferris Street Clinton Township MI 48036 (Map) Attendees: Johannes Bach, Nisa Bloor (Job Profile) </div>		12 9a - 12p Caroline Burhans, Move Only Who: JB, NB, JE	13 9:30a - 5p Burhans, BS, JE, RE
16			19 8a - 2p Joan April Who: NB	20
23 9a - 5p Joan April,	24 10a - 3p Joe Darkis,	25 10a - 4:30p Marion	26 9:30a - 1p Bella Barnier,	27

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.

Add | Edit

Save Return Delete Duplicate

Editing Event (ID: 1356)

Event Start:* Jun 03 2019 01:00 PM Event End:* Jun 03 2019 03:30 PM 1) Event Tag:* Job 2) Job: Benson, Sandie (482) - Mo

Description:* [Insert 'Current' Address](#) [Insert 'New' Address](#)
 We'll be working in the basement today. They have cats, take your pills if you are allergic!
 [map:39140 Ferris Street Clinton Township MI 48036]

Contact* System Administrator - v Reminder 1 [x] Reminder 2 [x] Color [D] Skip Notifications?

Attendee Management by: Direct v

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.

The screenshot displays the 'Add | Edit' interface for an event. At the top, there are buttons for 'Save', 'Return', 'Delete', and 'Duplicate'. Below this, the event details are shown: 'Editing Event (ID: 1356)', 'Event Start: Jun 03 2019 01:00 PM', 'Event End: Jun 03 2019 03:30 PM', '1) Event Tag: Job', and '2) Job: Benson, Sandie (482) - M'. The description field contains the text: 'We'll be working in the basement today. They have cats, take your pills if you are allergic! [map:39140 Ferris Street Clinton Township MI 48036]'. The contact is set to 'System Administrator'. There are two reminder fields, both with an 'x' icon. The color is set to 'D'. The 'Attendee Management by:' dropdown is set to 'Direct' and is highlighted with a red box. Below this, a message says 'Below, please check all who will be attending:'. There is a 'Select/Unselect All' checkbox. A list of attendees is shown, each with a checkbox: System Administrator (ID: 1), Johannes Bach (ID: 36) (checked), Sally Backustin (ID: 60), Rachel Barrett (ID: 55), Nisa Bloor (ID: 14) (checked), Judy Estafan (ID: 58), and Brian Setzer (ID: 71). This list is also highlighted with a red box. At the bottom, there are buttons for 'Save', 'Return', 'Delete', and 'Duplicate', and a copyright notice: '©2019 SMMware LLC'.

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> ☆

Subject **SMMware Demo Site Event** 11:02 AM

To Me <bjacobs@rednoodle.com> ☆

Reply Forward Archive Junk Delete More ▾

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 26 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 screenshot shows the 'Add | Edit' interface for an event. At the top, there are buttons for 'Save', 'Return', 'Delete', and 'Duplicate'. Below this, it says 'Editing Event (ID: 1356)'. The form includes fields for 'Event Start:' (Jun 03 2019 01:00 PM), 'Event End:' (Jun 03 2019 03:30 PM), '1) Event Tag:' (Job), and '2) Job:' (Benson, Sandie (482) - Mo). A 'Description:' field contains the text: 'We'll be working in the basement today. They have cats, take your pills if you are allergic! [map:39140 Ferris Street Clinton Township MI 48036]'. There are also fields for 'Contact*' (System Administrator -), 'Reminder 1', 'Reminder 2', 'Color' (D), and 'Skip Notifications?'. The 'Attendee Management by:' dropdown is set to 'Invite', and the 'Respond by Date' is 'May 09 2019 10:05 AM'. The 'Team Size' is set to '0'. Below this, there is a section 'Below, please check all who are to be invited:' with a 'Select/Unselect All' checkbox and a list of checkboxes for various associates: System Administrator (ID: 1), Johannes Bach (ID: 36), Sally Backustin (ID: 60), Rachel Barrett (ID: 55), Nisa Bloor (ID: 14), Judy Estafan (ID: 58), and Brian Setzer (ID: 71). At the bottom, there are 'Save', 'Return', 'Delete', and 'Duplicate' buttons, and a copyright notice '©2019 SMMware LLC'.

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.

The screenshot shows the 'Manage Schedule' interface. At the top, a red box highlights a confirmation message: 'The information has been saved, 2018-06-30 13:35:43. Invitations were sent to 5 associates'. Below this, the event details are shown: 'Editing Event (ID: 101)'. The event start is 'Jul 05 2018 01:00 PM' and the end is 'Jul 05 2018 03:00 PM'. The event tag is 'Job' and the job is 'Anchoman, Marion (468)'. The description is 'We'll be working at the new house today, 3 people total. 2 in the basement and 1 in the kitchen. 123 4th St Yardmill City NY 12345 USA'. The contact is 'System Administrator - 1' and the reminder is 'Jul 03 2018 02:00 PM'. The 'Add attendees directly, or use invite system?' dropdown is set to 'Invite'. The 'Respond by Date' is 'Jul 02 2018 02:00 PM' and the 'Team Size' is '3'. Below this, there is a section 'Below, please check all who are invited:' with a 'Select/Unselect All' checkbox. A legend indicates: [I]=Invited, [R]=Requesting, [D]=Declined, [U]=Unassigned. The list of invitees includes: System Administrator (ID: 1), Johannes Bach (ID: 36) [I], Sally Backustin (ID: 60) [I], Rachel Barrett (ID: 55), Nisa Bloor (ID: 14) [I], Judy Estafan (ID: 58) [I], and Brian Setzer (ID: 71) [I]. At the bottom, there are 'Save', 'Return', and 'Delete' buttons, and a copyright notice '©2018 SMMware LLC'.

Below is an example of an invite email.

The screenshot shows an email interface. The header includes the sender 'From noreply@demo.smmware.com <noreply@demo.smmware.com>', subject 'Subject SMMware Demo Site Event - Invite', and recipient 'To Me <bjacobs@smmware.com>'. The email body contains the following text: 'Hello Brian Setzer, This is an event invitation from the SMMware system. Event ID: 70 Start: 2018/05/08 11:00 End: 2018/05/08 13:00 Event description: 9707 Old Georgetown Road Unit 1615 Bethesda MD 20814 Assignments will be made any time after 2018/05/05 11:00. If you are interested please [click here](#) before the deadline in order to be considered. If you are not interested, please [click here](#). If you have any questions, your contact for this event is: System Administrator (123)123-1234 Mobile 321 321 4322 Home'. The footer shows 'Unread: 2 Total: 9 26 Today Pane'.

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.

Manage Schedule
Add | Edit

Save Return Delete

Editing Event (ID: 101)

Event Start:* Jul 05 2018 01:00 PM Event End:* Jul 05 2018 03:00 PM 1) Event Tag:* Job 2) Job: Anchorman, Marion (468) - (v)

Description:* [Insert 'Current' Address](#) [Insert 'New' Address](#)
We'll be working at the new house today, 3 people total. 2 in the basement and 1 in the kitchen.
123 4th St Yardmill City NY 12345 USA

Contact* System Administrator - 1 Reminder 1 Jul 03 2018 02:00 PM Reminder 2

Add attendees directly, or use invite system? Invite v
Respond by Date* Jul 02 2018 02:00 PM Team Size* 3

Below, please check all who are invited:
 Select/Unselect All

[I]=Invited, [R]=Requesting, [D]=Declined, [U]=Unassigned

System Administrator (ID: 1) Johannes Bach (ID: 36) [R] Sally Backustin (ID: 60) [I] Rachel Barrett (ID: 55)
 Nisa Bloor (ID: 14) [R] Judy Estafan (ID: 58) [R] Brian Setzer (ID: 71) [D]

Assign Attendees

Save Return Delete

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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.

Manage Schedule

Assign Attendees

Step 1 of 2: Selection

Event Start:* 2018-05-08 11:00 **Event End:*** 2018-05-08 13:00 **1) Event Tag:*** Job **2) Job:** Joe Darkis - Downsize and Move Services

Description: 9707 Old Georgetown Road Unit 1615 Bethesda MD 20814

Contact* System Administrator (ID: 1) **Reminder 1** 2018-05-07 11:00 **Reminder 2** Not set

Add attendees directly, or use invite system? Invite, response deadline 2018-05-05 11:00

Below is a list of all who will be attending:
Attendees not yet assigned.

Event Invitee Listing
Assignment is only made from here once, initially. After that, you can manage attendees directly from the event editing screen.
When you click 'Assign This Team' below, emails will be sent to all requestors informing them of their status outcome (Assigned or Unassigned).

Associate responses for this event (ordered by response date):

Invitees	Response (Date)	Add?
Johannes Bach	Requesting (4-26 11:15)	<input type="checkbox"/> Add
Brian Setzer	Requesting (4-26 11:17)	<input type="checkbox"/> Add
Judy Estafan	Declined (4-26 11:17)	

[Assign This Team](#)

[Edit Event Again](#)

[Return to Listing](#)

The second screen confirms the final status of each responsee.

Step 2 of 2: Assignments Saved

1 assigned, 1 unassigned.

Event Start:* 2018-05-08 11:00 **Event End:*** 2018-05-08 13:00 **1)** Jo

Description: 9707 Old Georgetown Road Unit 1615 Bethesda MD 20814

Contact* System Administrator (ID: 1) **Reminder 1** 2018-05-07 11:00

Add attendees directly, or use invite system? Invite, response deadline 2018-05-05 11:00

Below is a list of all who will be attending:
Johannes BachAttendees not yet assigned.

Attendees	Status
Johannes Bach	Assigned
Brian Setzer	Unassigned
Judy Estafan	Declined

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.

Manage Schedule
Add | Edit

Save Return Delete

Editing Event (ID: 101)

Event Start:* Jul 05 2018 01:00 PM **Event End:*** Jul 05 2018 03:00 PM **1) Event Tag:*** Job **2) Job:** Anchorman, Marion (468) - (v)

Description:* Insert 'Current' Address Insert 'New' Address
We'll be working at the new house today, 3 people total. 2 in the basement and 1 in the kitchen.
123 4th St Yardmill City NY 12345 USA

Contact* System Administrator - 1 **Reminder 1** Jul 03 2018 02:00 PM **Reminder 2**

Add attendees directly, or use invite system ? Invite (Assigned) v

Attendees already initially assigned, but below you may modify who will be attending:
 Select/Unselect All

[I]=Invited, [R]=Requesting, [D]=Declined, [U]=Unassigned


<input type="checkbox"/> System Administrator (ID: 1)	<input checked="" type="checkbox"/> Johannes Bach (ID: 36)	<input type="checkbox"/> Sally Backustin (ID: 60) [I]	<input type="checkbox"/> Rachel Barrett (ID: 55)
<input checked="" type="checkbox"/> Nisa Bloor (ID: 14)	<input checked="" type="checkbox"/> Judy Estafan (ID: 58)	<input type="checkbox"/> Brian Setzer (ID: 71) [D]	

Save Return Delete

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Availability

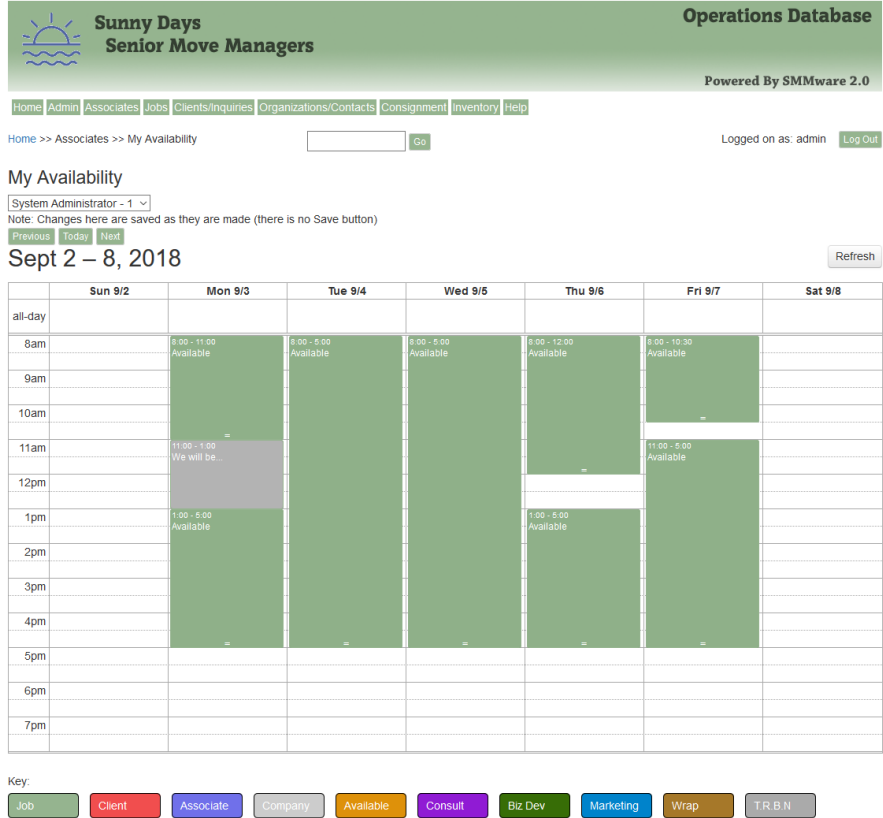
Lastly, the “Availability” based approach.

	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)
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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.



Sunny Days Senior Move Managers Operations Database
Powered By SMMware 2.0

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

Home >> Associates >> My Availability Go Logged on as: admin Log Out

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		9:00 - 11:00 Available	9:00 - 5:00 Available	9:00 - 5:00 Available	9:00 - 12:00 Available	9:00 - 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							

Key:
Job Client Associate Company Available Consult Biz Dev Marketing Wrap T.R.B.N

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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.

Attendee Management by: Availability

-M -W < today > +W +M Reset Jul 9 2019, Tue day week

Planner	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm
Associates												
Brian Setzer	Available											
Judy Estafan	Available								Available			
Nisa Bloor			Available									
Rachel Barrett	Available											
Sally Backustin	Available							Available				
Johannes Bach	Available											
System Administrator	Available											

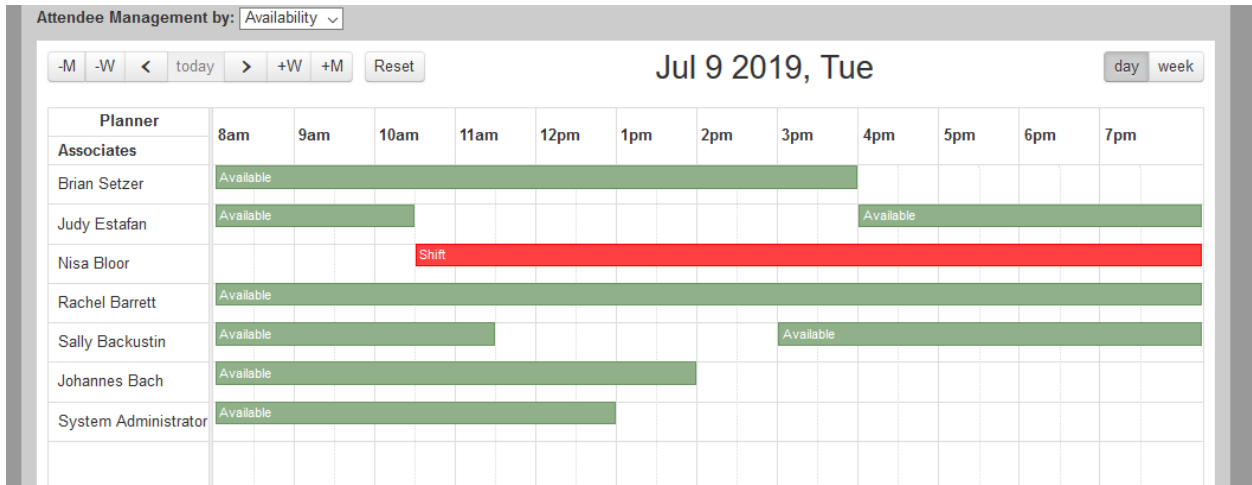
Start by navigating to the day you wish to select, using the navigation toolbar.

Attendee Management by: Availability

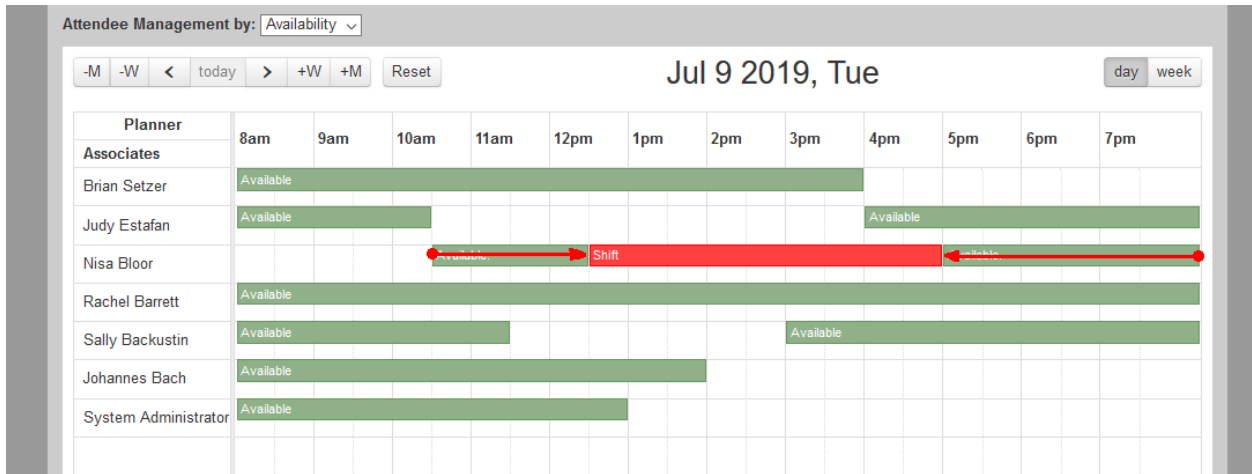
-M -W < today > +W +M Reset Jun 10 2019, Mon day week

Planner	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm
Associates												
Brian Setzer	Available											

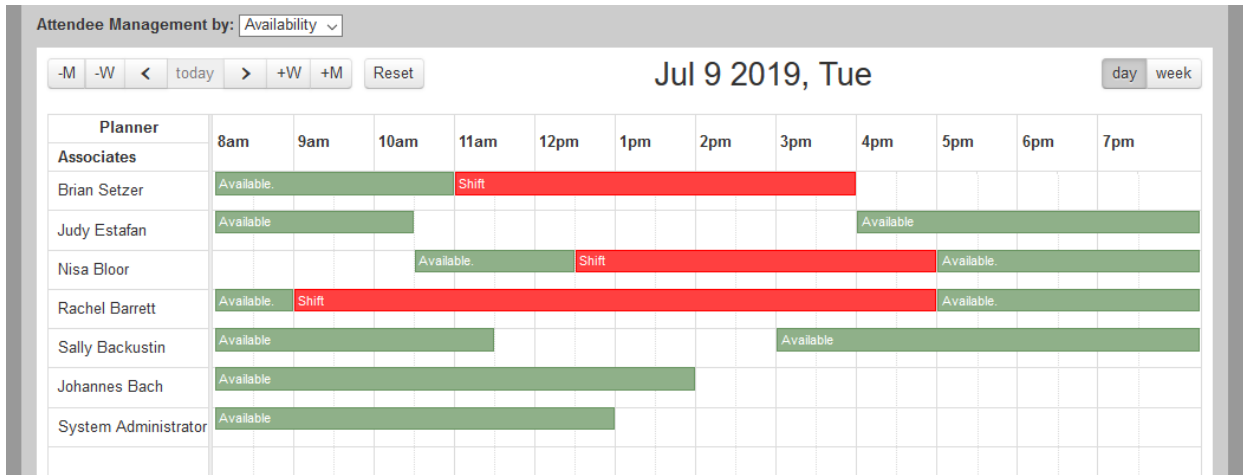
You begin by clicking on one of the 'Available' bars, which will turn red and have a label of 'Shift'.



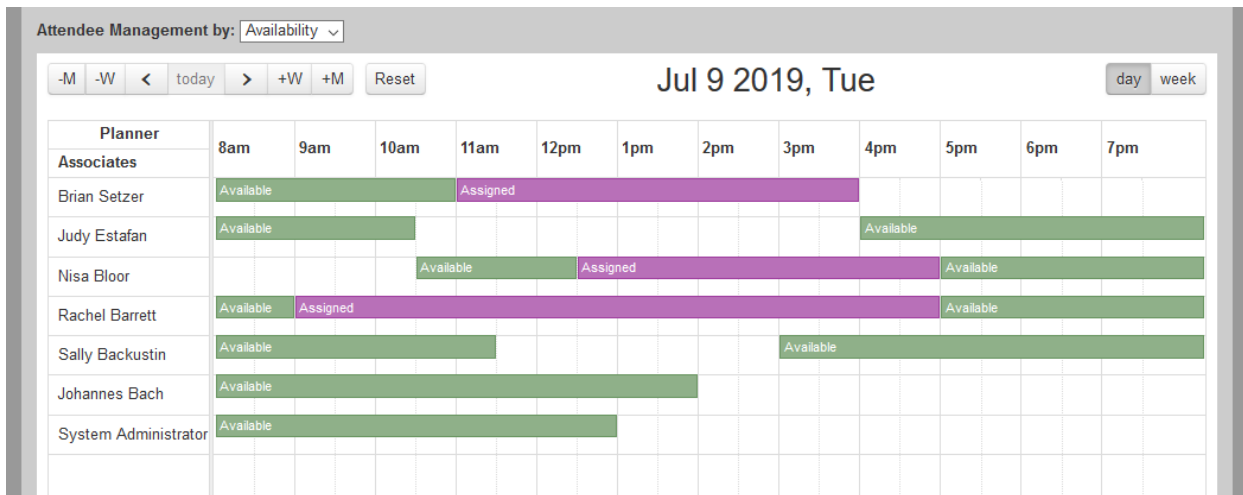
Next, you mouse over the left edge of the 'Shift' bar and grab and drag it to the appropriate starting time for that shift. Repeat for the end of the shift.



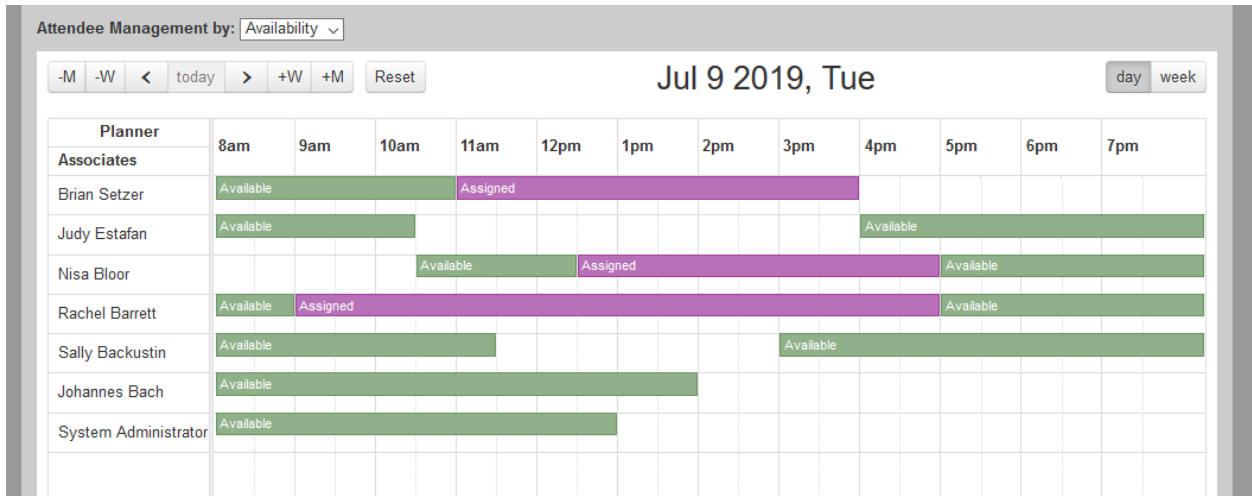
You can repeat for other Associates as needed, each with their own start and end times.



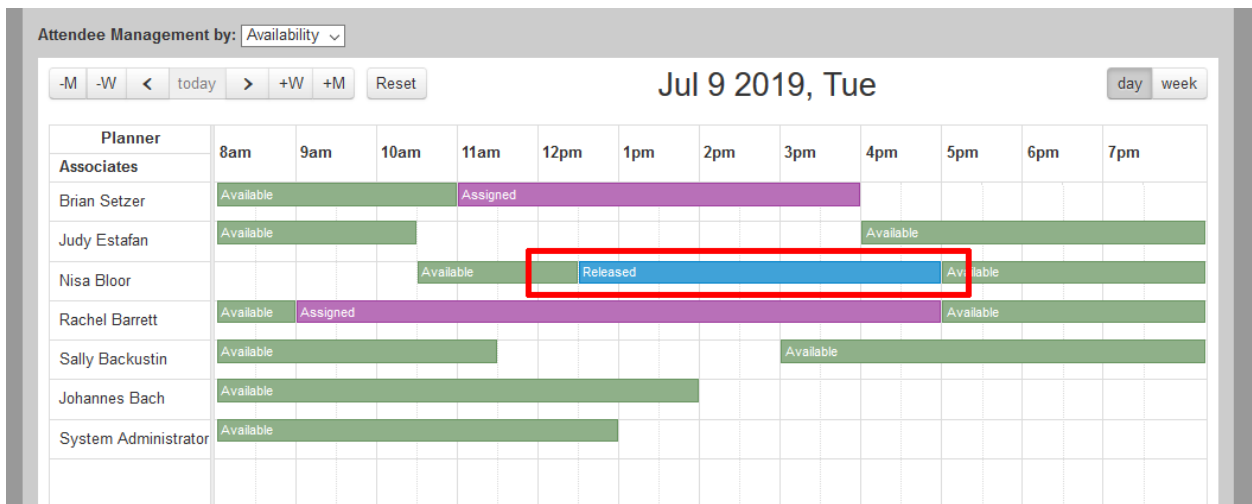
When all shifts have been assigned, click 'Save' and the screen will change to show the shifts as 'Assigned', the changes will be saved to the database, and emails will be sent out to the applicable associates.



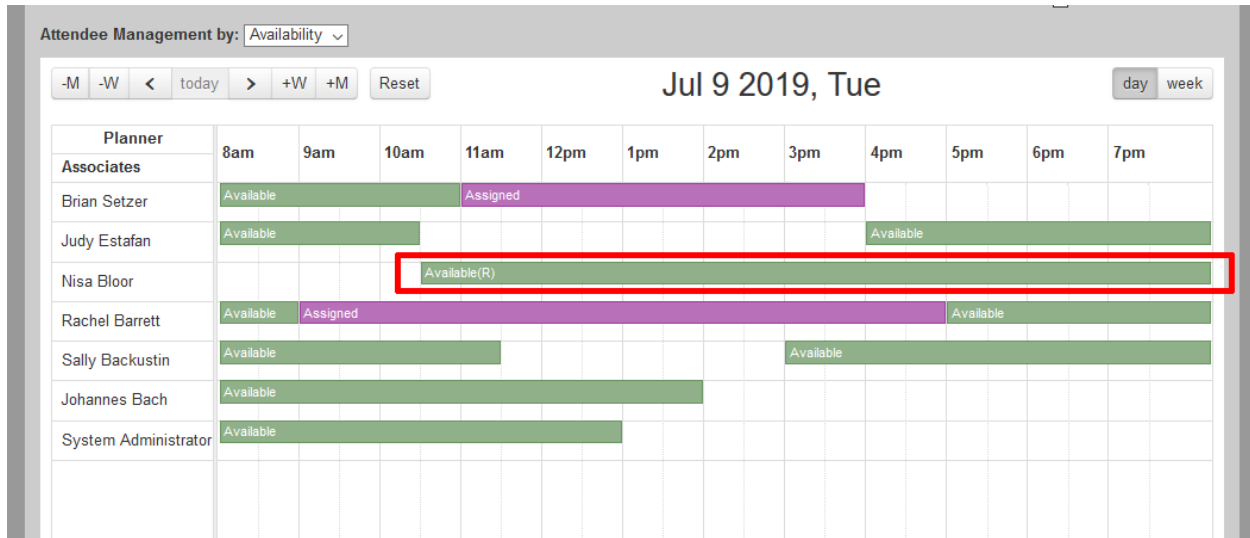
The screen below shows the final calendar with three associates assigned.



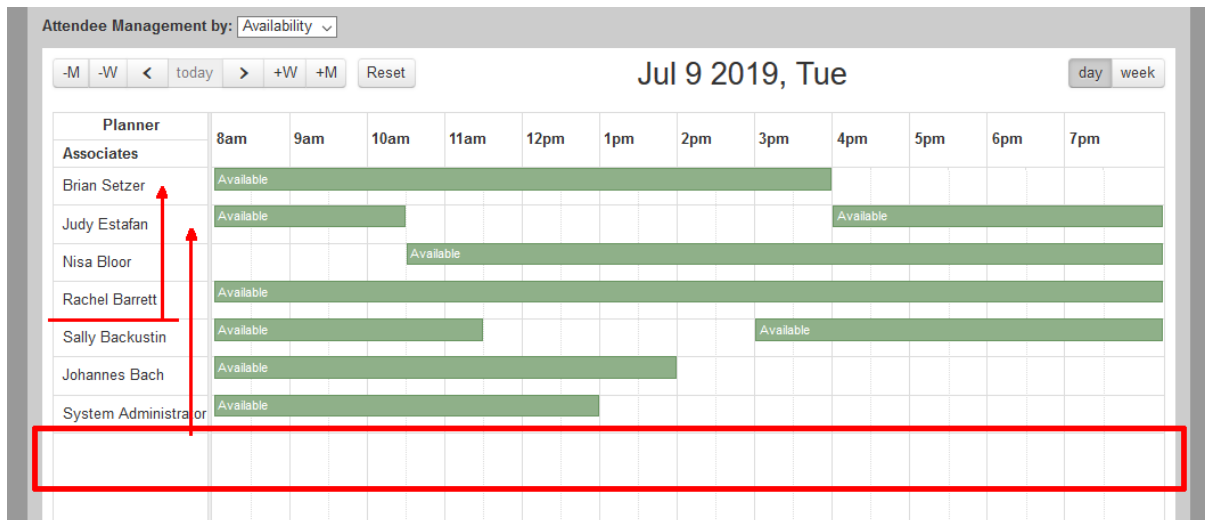
If an associate can no longer attend this event, click on “Assigned” and the label of the bar changes to say “Released”. This means that their time will not revert to “Available”, which makes sense since they are saying that they cannot work then (perhaps they are sick and going to the doctor). This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

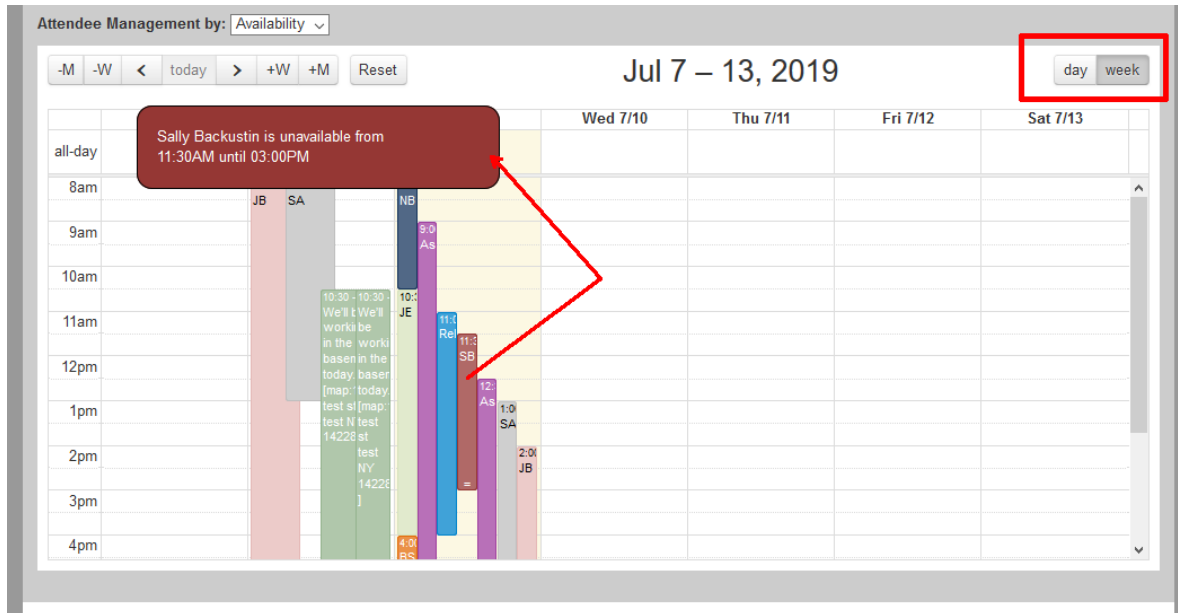


If you have ten or fifteen associates and the ones you are interested are scattered throughout the list, you can click on the name of an associate to move them to the top. In this way, you can gather the associates you want at the top, in a convenient visual summary.



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.

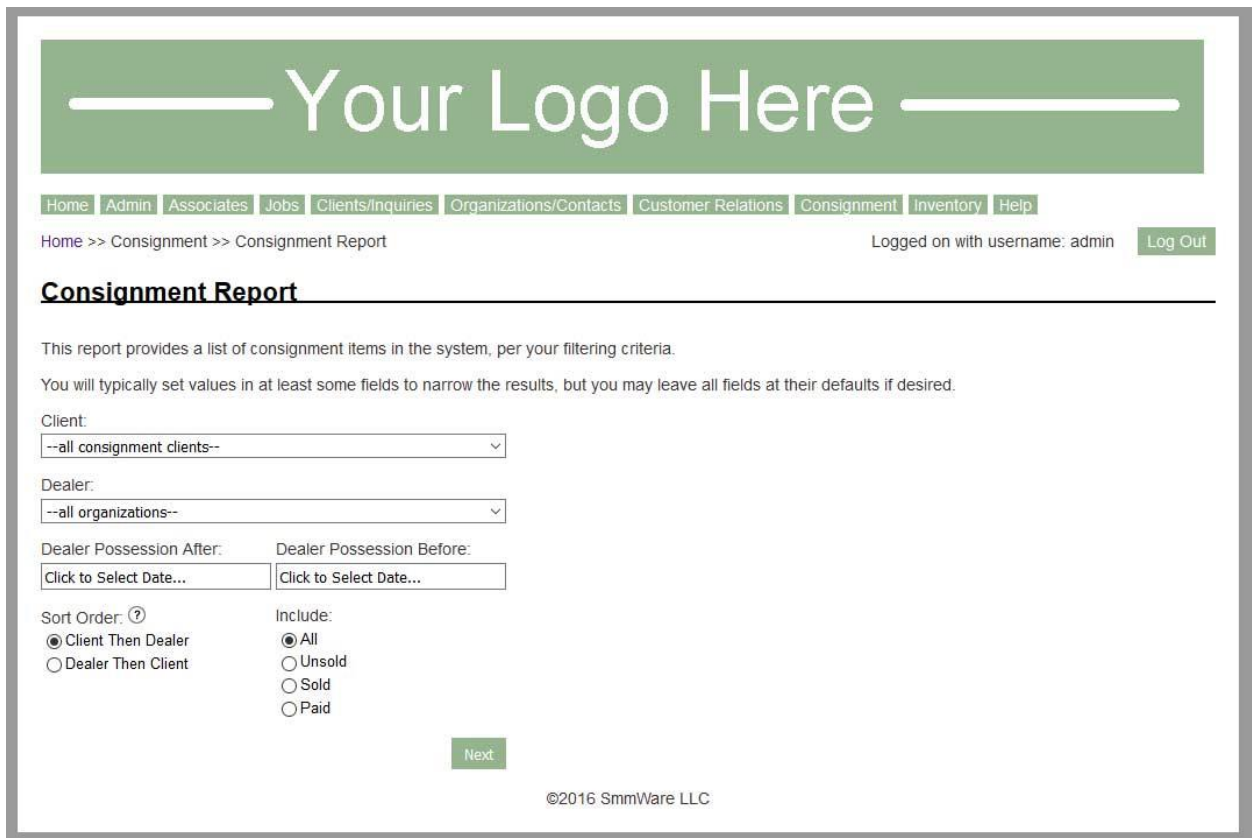
Consignment Dealers are Organizations that have been assigned to the category “Consignment & Retail”

	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)
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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.



The screenshot shows a web application interface for a 'Consignment Report'. At the top, there is a green banner with the text 'Your Logo Here'. Below this is a navigation menu with links: Home, Admin, Associates, Jobs, Clients/Inquiries, Organizations/Contacts, Customer Relations, Consignment, Inventory, and Help. The current page is 'Consignment Report', and the user is logged in as 'admin'. The report title is 'Consignment Report'. A description states: 'This report provides a list of consignment items in the system, per your filtering criteria. You will typically set values in at least some fields to narrow the results, but you may leave all fields at their defaults if desired.' The filtering fields include: 'Client' (dropdown menu with '--all consignment clients--'), 'Dealer' (dropdown menu with '--all organizations--'), 'Dealer Possession After' and 'Dealer Possession Before' (date selection fields), 'Sort Order' (radio buttons for 'Client Then Dealer' and 'Dealer Then Client'), and 'Include' (radio buttons for 'All', 'Unsold', 'Sold', and 'Paid'). A 'Next' button is located at the bottom of the form. The footer contains the copyright notice '©2016 SmmWare LLC'.

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	\$0.00	\$0.00	\$8.00 40%	\$12.00	\$0.00	\$3.00 15.00%	\$9.00	1	2013-05-25 2013-07-05	Paid (PID:141)
	GREEN PLANTER	GT1133 (517)	\$25.00	\$0.00	\$0.00	\$10.00 40%	\$15.00	\$0.00	\$3.75 15.00%	\$11.25	1	2013-05-25 2016-01-03	Paid (PID:355)
	JAPANESE IMARI SMALL PLATE	GT1137 (521)	\$27.00	\$0.00	\$0.00	\$10.80 40%		\$0.00	\$4.05 15.00%		1	2013-05-25 2013-08-05	Paid (PID:141)
	ASIAN PLANTER	GT1141 (525)	\$22.00	\$0.00	\$0.00	\$8.80 40%		\$0.00	\$3.30 15.00%		1	2013-05-25 2013-09-05	Paid (PID:160)
	ASIAN BLUE & WHITE BOWL	GT1145 (529)	\$31.00	\$0.00	\$0.00	\$12.40 40%		\$0.00	\$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	\$0.00	\$0.00	\$10.00 40%	\$15.00	\$0.00	\$3.75 15.00%	\$11.25	1	2013-05-25 2016-01-04	Paid (PID:355)
	ASIAN PORTRAIT	GT1159 (556)	\$310.00	\$0.00	\$0.00	\$124.00 40%	\$186.00	\$0.00	\$46.50 15.00%	\$139.50	1	2013-05-25 2013-10-05	Paid (PID:175)
	Set of 3 pillows	GT1162 (706)	\$23.00	\$0.00	\$0.00	\$9.20 40%		\$0.00	\$3.45 15.00%		1	2013-05-25 2013-07-05	Paid (PID:141)
	PHOTO OF KENNEDY SIGNATURE?	GT1300 (733)	\$22.00	\$0.00	\$0.00	\$8.80 40%		\$0.00	\$3.30 15.00%		1	2013-05-25 2013-08-05	Paid (PID:141)
	ASIAN PRINT	GT1304 (737)	\$25.00	\$0.00	\$0.00	\$10.00 40%	\$15.00	\$0.00	\$3.75 15.00%	\$11.25	1	2013-05-25 2016-10-14	Paid (PID:356)
	OKADA REMINISCENCE	GT1308 (741)	\$25.00	\$0.00	\$0.00	\$10.00 40%	\$15.00	\$0.00	\$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 one of the two dropdowns, Clients and Dealer. Then click next.

The screenshot shows a web application interface for 'Item Administration'. At the top, there is a green banner with the text 'Your Logo Here'. Below this is a navigation menu with links: Home, Admin, Associates, Jobs, Clients/Inquiries, Organizations/Contacts, Customer Relations, Consignment, Inventory, and Help. The current page path is 'Home >> Consignment >> Item Administration', and the user is logged in as 'admin' with a 'Log Out' button. The main heading is 'Item Administration'. A message states: 'Set a value for at least one dropdown below, either client and/or dealer to begin (consignment dealers can be added/edited using the 'Change Organization Information' command on the main menu)'. There are two dropdown menus: 'Client:' with the value '--all clients--' and 'Dealer:' with the value '--all organizations--'. A green 'NEXT' button is positioned below the dropdowns. At the bottom center, the copyright notice '©2016 SmmWare LLC' is displayed.

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

Your Logo Here

Home | Admin | Associates | Jobs | Clients/Inquiries | Organizations/Contacts | Customer Relations | Consignment | Inventory | HelpLogged on with username: admin [Log Out](#)

Home >> Consignment >> Item Administration

Item Administration

Dealer: Heritage Antiques (ID: 149)
Organization Type(s): (ID:)
Address: 39 E. Patrick Street Frederick, MD, 21701

Client: William Saint (ID: 244)
Ingleside at Rock Creek 3050 Military Rd. NW, Unit 431 Washington 20815 jpnhand@gmail.com

[NEW ITEM](#)[CANCEL](#)

Dealer Item ID	Description	Item ID	Dealer	Commands
HA524	Carved Bed Headboard	1989	Heritage Antiques	[Edit] [Delete]

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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.

The screenshot shows a web application interface for 'Item Administration'. At the top, there is a green banner with the text 'Your Logo Here'. Below this is a navigation menu with links: Home, Admin, Associates, Jobs, Clients/Inquiries, Organizations/Contacts, Customer Relations, Consignment, Inventory, and Help. The current page is 'Home >> Consignment >> Item Administration', and the user is logged in as 'admin'. The main heading is 'Item Administration'. Below this is a section titled 'ENTER A NEW CONSIGNMENT ITEM'. The form includes several fields: '* Dealer:' (Heritage Antiques (ID: 149)), '* Client:' (Saint, William (244)), '* Item Description:', 'Number of Pieces:', 'Discount Commission (%)' (Company rate 15% (default)), '* Dealer Possession Date:' (Click to Select Date...), 'Approximate Value:', '* Initial Price:', 'Cash Purchase:' (No), and 'Dealer Item ID:'. There are also sections for 'Dealer Expense:' and 'Company Expense:', each with a description and date field. At the bottom right, there are 'NEXT' and 'CANCEL' buttons. The footer contains the copyright notice '©2016 SmmWare LLC'.

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.

Dealer Number	Item Number	Description	Sold For Amount
GT1286	687	SET OF 6 ROSENTHAL WINE GLASSES	\$ 25 <input type="text"/>
GT1293	721	ITALIAN CERAMIC BAMBOO TRAY	\$ 25 <input type="text"/>
GT1298	731	GEORGE SHULTZ SIGNATUR	\$ 25 <input type="text"/>
GT1304	737	ASIAN PRINT	\$ 25 <input type="text"/>
GT1308	741	OKADA REMINISCENCE	\$ <input type="text"/>
GT1316	752	OLD WATERS HOUSE SIGNED & NUMBERED PRINT	\$ <input type="text"/>

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 >> 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

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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 screenshot shows a web application interface for 'Pay Clients'. At the top, there is a green banner with the text 'Your Logo Here'. Below this is a navigation menu with links: Home, Admin, Associates, Jobs, Clients/Inquiries, Organizations/Contacts, Customer Relations, Consignment, Inventory, and Help. The current page is 'Pay Clients', and the user is logged in as 'admin'. The page displays summary statistics: Total Amount Due, Unpaid Items: 23, Number of Clients to Pay: 9, and Pending Adjustments: 6. Below these statistics, there are instructions: '1) Select an individual client to pay ---OR--- 2) Check 'Pay All' (But don't do both)'. The form includes a dropdown menu for 'Client to Be Paid' with the text '--select client for payment--'. There is a checkbox for 'Pay All' with the label 'yes'. Below that is a field for '* Payment Date:' with a 'Click to Select Date...' button. At the bottom, there are two date selection fields: 'Sold On/After Date:' and 'Sold On/Before Date:', both with 'Click to Select Date...' buttons. A green 'NEXT' button is located at the bottom center of the form area. The footer of the page contains the copyright notice '©2016 SmmWare LLC'.

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

Home >> Consignment >> Pay Clients

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	\$0.00	\$0.00	\$10.00 40%	\$15.00	\$0.00	\$3.75 15.00%	\$11.25	1	2013-05-25 2016-10-14
GEORGE SHULTZ SIGNATUR	GT1298 (731)	\$25.00	\$0.00	\$0.00	\$10.00 40%	\$15.00	\$0.00	\$3.75 15.00%	\$11.25	1	2013-05-25 2016-10-14
ASIAN PRINT	GT1304 (737)	\$25.00	\$0.00	\$0.00	\$10.00 40%	\$15.00	\$0.00	\$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.

The screenshot shows a web application interface for a "Client Payment Report". At the top, there is a green banner with the text "Your Logo Here" flanked by horizontal lines. Below this is a navigation menu with items: Home, Admin, Associates, Jobs, Clients/Inquiries, Organizations/Contacts, Customer Relations, Consignment, Inventory, and Help. The current page path is "Home >> Consignment >> Client Payment Report". On the right, it says "Logged on with username: admin" and a "Log Out" button. The main heading is "Client Payment Report". Below the heading, a note says "If desired, you can leave all fields at their defaults." There are three input fields: a dropdown menu for "Client:" with the text "--select consignment client--", a "Paid After Date:" field with a "Click to Select Date..." button, and a "Paid Before Date:" field with a "Click to Select Date..." button. A green "Next" button is positioned below the date fields. At the bottom center, there is a copyright notice: "©2016 SmmWare LLC".

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 screenshot shows a web application interface for 'Adjust Client Payment'. At the top, there is a green banner with the text 'Your Logo Here' and two horizontal lines. Below this is a navigation menu with the following items: Home, Admin, Associates, Jobs, Clients/Inquiries, Organizations/Contacts, Customer Relations, Consignment, Inventory, and Help. The current page path is 'Home >> Consignment >> Adjust Client Payment'. The user is logged in with the username 'admin', and there is a 'Log Out' button. The main heading is 'Adjust Client Payment'. Below the heading, there is a label '* Consignment Client:' followed by a dropdown menu with the text '--select consignment client--'. A green 'NEXT' button is positioned below the dropdown. At the bottom center, there is a copyright notice: '©2016 SmmWare LLC'.

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

— Your Logo Here —

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

Home >> Consignment >> Adjust Client Payment Logged on with username: admin [Log Out](#)

Adjust Client Payment

Client: William Saint (ID: 244)
Ingleside at Rock Creek 3050 Military Rd. NW, Unit 431 Washington, DC, 20815 240-644-5384 home

No existing Adjustment Entries

[ADD NEW](#)

[START OVER](#)

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

— Your Logo Here —

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

Home >> Consignment >> Adjust Client Payment Logged on with username: admin [Log Out](#)

Adjust Client Payment

Client: William Saint (ID: 244)
Ingleside at Rock Creek 3050 Military Rd. NW, Unit 431 Washington, DC, 20815 240-644-5384 home

ADD ADJUSTMENT

* Adjustment Amount:

* Reason for Adjustment:

[CONTINUE](#)

[RETURN](#)

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

The screenshot shows a web application interface with a green header bar containing the text "Your Logo Here". Below the header is a navigation menu with items: Home, Admin, Associates, Jobs, Clients/Inquiries, Organizations/Contacts, Customer Relations, Consignment, Inventory, and Help. The breadcrumb trail is "Home >> Consignment >> Adjust Client Payment". The user is logged in as "admin" and has a "Log Out" button. The main heading is "Adjust Client Payment". Below this, the client information is displayed: "Client: William Saint (ID: 244)" and "Ingleside at Rock Creek 3050 Military Rd. NW, Unit 431 Washington, DC, 20815 240-644-5384 home". A table lists one adjustment:

Adjustment Description	Adjustment Amount	Adjustment ID	Commands
We accidentally broke an item	\$20	259	[Edit] [Delete]

Below the table are two buttons: "ADD NEW" and "START OVER". At the bottom, the copyright notice "©2016 SmmWare LLC" is visible.

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.

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

Home >> Consignment >> Manage Dealer rates Logged on with username: admin [Log Out](#)

Manage Dealer rates

To begin, select a Dealer

Dealer ID	Dealer Name	Present Rate	Present Rate Method	Present Effective Date	Commands
150	[REDACTED]	Not Set	Not Set		[View History / Edit Rate]
148	[REDACTED]	30%	Percentage	2011-01-01	[View History / Edit Rate]
174	[REDACTED]	15%	Percentage	2011-01-01	[View History / Edit Rate]
149	[REDACTED]	\$5	Flat Fee	2016-01-01	[View History / Edit Rate]
142	[REDACTED]	30%	Percentage	2016-01-06	[View History / Edit Rate]
143	[REDACTED]	\$6	Flat Fee	2016-01-02	[View History / Edit Rate]

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

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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--

List by Location, 'Aggregate' View

--select job -- items to this job

--select location-- 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	<input type="text"/>
Cardboard Box, 2 Cu Ft	1.64 (1.50 + 0.14)	5.00	1	<input type="text"/>
Cardboard Box, 4 Cu Ft	1.92 (1.75 + 0.17)	5.00	1	<input type="text"/>
Cardboard Box, 6 Cu Ft	0 (+)	5.00		<input type="text"/>

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	<input type="text"/>
Cardboard Box, 2 Cu Ft	1.64 (1.50 + 0.14)	5.00	1	<input type="text"/>

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	<input type="text"/>

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).

Show Inventory

Filters:

Sort by: item location Grouping: single aggregate

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

List by Item, 'Single' View

--select job -- items to this job

--select location-- items to this location

Item: Packing Tape (3 rows found)

Inventory ID	Location	Purchase Receipt #	Cost (Price + Tax)	Current Selling Price	Date Purchased	To Be Assigned
66	Main Office	16	1.09	5.00	2016-05-10 09:56:00	<input type="checkbox"/>

You can assign an item to a job from here.

Show Inventory

Filters:

Sort by: item location Grouping: single aggregate

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

List by Item, 'Single' View

--select job -- items to this job

--select location-- items to this location

Item: Packing Tape (3 rows found)

Inventory ID	Location	Purchase Receipt #	Cost (Price + Tax)	Current Selling Price	Date Purchased	To Be Assigned
66	Main Office	16	1.09	5.00	2016-05-10 09:56:00	<input type="checkbox"/>

Or you can transfer it from one location to another.

Show Inventory

Filters:

Sort by: item location Grouping: single aggregate

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

List by Item, 'Single' View

--select job -- items to this job

--select location-- items to this location

Item: Packing Tape (3 rows found)

Inventory ID	Location	Purchase Receipt #	Cost (Price + Tax)	Current Selling Price	Date Purchased	To Be Assigned
66	Main Office	16	1.09	5.00	2016-05-10 09:56:00	<input type="checkbox"/>

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	sdfid 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: Buying Associate: Purchase Date:

Total Amount of Purchase: Purchase 'Other' Amount: Sales Tax Total: Sales Tax %:

Description:

Enter items from your receipt below

Qty	Item	Price Ea	Subtotal	Tax	Location	Command
<input type="text" value="1"/>	<input type="text" value="Cardboard Box, 2 Cu Ft - 2"/>	<input type="text" value="4.00"/>	4.00	0.21	<input type="text" value="Main Office - 1"/>	Delete
<input type="text" value="2"/>	<input type="text" value="Cardboard Box, 4 Cu Ft - 3"/>	<input type="text" value="5.00"/>	10	0.52	<input type="text" value="Owner Owner - 2"/>	Delete
<input type="text" value="3"/>	<input type="text" value="Cardboard Box, 6 Cu Ft - 4"/>	<input type="text" value="6.00"/>	18	0.96	<input type="text" value="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.

Usage Report

Filters:

Grouping: single aggregate

Filter by job: --select job --

List by Job, 'Single' View

--select location-- items to this location

Job (ID:265): Martha Andre, Downsize Only

Item	Selling Price	Cost (Price + Tax)	Inventory ID	Command
Cardboard Box, 2 Cu Ft	1.00	1.64 (1.50 + 0.14)	59	<input type="checkbox"/>
			53	<input type="checkbox"/>
Cardboard Box, 4 Cu Ft	1.25	1.92 (1.75 + 0.17)	56	<input type="checkbox"/>
Cardboard Box, 6 Cu Ft	1.75	6.6 (6.00 + 0.60)	50	<input type="checkbox"/>
			38	<input type="checkbox"/>

Total selling price for this job of the above items: 18.12

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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).

Usage Report

Filters:

Grouping: single aggregate

Filter by job: --select job --

Filter

Reset

List by Job, 'Single' View

--select location-- items to this location

Job (ID:265): Martha Andre, Downsize Only

Item	Selling Price	Cost (Price + Tax)	Inventory ID	Command
Cardboard Box, 2 Cu Ft	1.00	1.64 (1.50 + 0.14)	59	<input type="checkbox"/>
			53	<input type="checkbox"/>
Cardboard Box, 4 Cu Ft	1.25	1.92 (1.75 + 0.17)	56	<input type="checkbox"/>
Cardboard Box, 6 Cu Ft	1.75	6.6 (6.00 + 0.60)	50	<input type="checkbox"/>
			38	<input type="checkbox"/>

Total selling price for this job of the above items: 18.12

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

Usage Report

Filters:

Grouping: single aggregate

Filter by job: --select job --

Filter

Reset

List by Job, 'Single' View

--select location-- items to this location

Job (ID:265): Martha Andre, Downsize Only

Item	Selling Price	Cost (Price + Tax)	Inventory ID	Command
Cardboard Box, 2 Cu Ft	1.00	1.64 (1.50 + 0.14)	59	<input type="checkbox"/>
			53	<input type="checkbox"/>
Cardboard Box, 4 Cu Ft	1.25	1.92 (1.75 + 0.17)	56	<input type="checkbox"/>
Cardboard Box, 6 Cu Ft	1.75	6.6 (6.00 + 0.60)	50	<input type="checkbox"/>
			38	<input type="checkbox"/>

Total selling price for this job of the above items: 18.12

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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:

Description:

Address:

Address 2:

City:

State:

Zip:

Status:

[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

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

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

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:

Description:

Unit Type:

Consumable/Reusable:

Selling Price, Next Sale:

Reorder Qty:

Status:

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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/-uLylQrYk_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