



Friday, November 17, 2017

## **PSA Restoration Contractor ~Lunch & Learn Program 2018 (Season One)**

### **Topics: "Take your Business Paperless" PSA E-Forms**

**Presenter: Mary-Anne Markle**

**Date: December 13<sup>th</sup> 2017**

This training session on PSA Web Electronic (Fillable) Forms will show you how customizable Forms are attached to a job, as well as how to create your own Forms. Learn how Forms populate with existing job information, as well as adding additional details on demand from the field, including digital signatures. The building and design of a new Form from scratch will be reviewed, as well as formatting your final Form/Report layout.

### **Topic: "Creating Automated Workflow Processes" – PSA Web Workflow**

**Presenter: Patty Borek**

**Date: January 17<sup>th</sup> 2018**

Previously labelled KPI, the new Workflow module has been enhanced with added functionality which will allow you to create specific job tasks by type. Watch as we walk through a workflow set up showing you how the enhanced features allow new job information, attachments, log notes & updates to dates to complete actions & tasks automatically. The workflow module will help companies define processes to ensure your staff is accountable for their action and establish a stronger sense of efficiency from start to finish. Reduce administration & automate task completions through single click job actions.

### **Topic: "Real time Production Visibility" – PSA Web Control Center**

**Presenter: Kristin Davies**

**Date: February 14<sup>th</sup> 2018**

Tired of using the same old report...? PSA Web offers an interactive snapshot of your production cycle. This will be a demonstration of how users can narrow down their search to show those jobs that are missing dates, un-assigned internal contacts or companies. Based on a lot of user feedback we have made a number of great changes that has allowed the control center to evolve beyond its original scope. Enhanced graphs depict your pipeline broken down by stage, job type and estimated revenue along with the quick job view at the bottom to open multiple job details within the control center.



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**Topic: "Freedom in the field" - PSA Mobile 3.75**

**Presenter: Mary-Anne Markle**

**Date: March 14<sup>th</sup> 2018**

Join us to maximize your usage of the PSA Mobile App 3.75 learn the basic features, what's new and troubleshooting tips. See the App in action creating jobs, timesheets, tracking equipment, uploading notes & pictures, as well as accessing critical job details offline. Check out the new E-Forms feature providing ability to "fill from" and "save to" job information, capturing signatures and emailing completed forms to anyone in the PSA system.

**Topics: "Importing Work Order Details" PSA Data Mining**

**Presenter: Dawn McAuliffe**

**Date: April 18<sup>th</sup> 2018**

Using Work Orders in the web? Our new Data Mining & Import tool allows customer to bring in CSV spreadsheets to import data into our system. Learn how to setup & bring customized XLS & CSV spreadsheets into the web, match column details into corresponding fields within PSA and import with the click of a button. Once created you can select setup entries from the quick import screen. Create imports for scopes, pricing, estimate details, materials, equipment, custom quotes and more.

**Topics: "The Power of processing WIP" PSA Desktop**

**Presenter: Deb Thomas**

**Date: May 16<sup>th</sup> 2018**

Learn the critical elements of why it is so important to use work in process. We review how to understand your team's responsibilities to having a smooth WIP procedure. Learn which reports to best utilize and track information. Identify "red flags" and what to look out for when dealing with troubling inputs. Learn how to spot "out of balances" and correct them as well as establishing best practices for these procedures in your office.