



June 1<sup>st</sup>, 2018

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

**Topics: “Smart Tech - Equipment Tracking” PSA Mobile 3.75**

**Presenter: Kristin Davies**

**Date: June 13<sup>th</sup> 2018**

Description: PSA Mobile aka “SMART Tech” was designed to help field technicians eliminate duplication and streamline the collection of information while out of the office. Equipment Tracking is one of the main functionalities to track the movement of a company’s assets such as Vehicles, Tools & Rental Equipment. This session will focus on the proper setup, tagging and processing of equipment transfers and common issues or problems contractors face when tracking equipment.

**Topic: “PSA Web & QuickBooks Integration” PSA Web**

**Presenter: Mary-Anne Markel**

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

Description: This session will focus on the integration between QuickBooks & PSA Web Job management to better understand the transfer of information and critical setup required before being able to fully leverage the integration between both platforms. This will also focus on the new changes and updates that have been made over the past few months for both the Online and Desktop versions of QuickBooks.

**Topic: “Catering to Property Management” – PSA Web**

**Presenter: Patty Borek**

**Date: August 15<sup>th</sup> 2018**

Description: In the relationship management section changes have been made to accommodate companies that deal with Property Management firms. This has opened up the ability to provide customers with multiple suite addresses as well as additional search criteria types that can be used to link many site, contacts and properties into a single parent. Join our session to better understand what is needed to properly setup and leverage the new changes & setting available within PSA web.



June 1<sup>st</sup>, 2018

**Topic: “Creating Job Notifications” - PSA Web**

**Presenter: Jennifer Obrycki**

**Date: September 12<sup>th</sup> 2018**

Description: This session will focus on creating and modifying job notifications based on critical date/time milestones. Learn how to these triggers can help your team stay on top and streamline of customer communications such as introductory letters, customer surveys and job reminders for staff on collections or job approvals. Join us to better understand the different possibilities when setting up new notifications as well as creating log note templates to automatically populate job information.

**Topics: “PSA Web Review – Best Practices”**

**Presenter: Dawn McAuliffe**

**Date: October 24<sup>th</sup> 2018**

Description: The information collected on your job file can provide strong statistical data to your management team and individual users if properly managed and maintained. Join this session to better understand best practices in PSA Web, recommendations regarding keeping up with dates, workflow notifications and proper notes/documentation. Learn the importance and power that reports analytics can provide your business.

**Topics: “Advanced Scheduling” PSA Web**

**Presenter: Deb Thomas**

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

Description: On a large reconstruction or remodeling project it helps to create a timeline that ties into schedule and is driven logically based on production phases. This session will focus on the advanced schedule and the changes that have been made in Web V11 that will allow users to schedule months in advance, check resources, create critical paths that operate based on estimated labor and the impact of your current availability. Create production print-outs for vendors/employees & customers to better understand their job timeline.



June 1<sup>st</sup>, 2018