



October 24th, 2018

PSA Restoration Contractor ~Lunch & Learn Program 2018 - 2019 (Season Three)

Topics: “Smart Tech V4” New Look, New Functionality. (Added Season Two)

Presenter: Kristin Davies

Date: November 14th 2018

Description:

PSA Mobile aka “SMART Tech” V4 launched back on October 10th and with it a whole new design and interface to the mobile application. We have provided a lot more information for the techs out in the field, while giving them a more simplistic interface to navigate. This session will focus on the changes made in V4 adding visibility on critical job information & notes. Updated look-up screens, the ability to change jobs on the fly and much more.

Topic: “New Dispatch & Scheduling V11” PSA Web

Presenter:

Date: December 12th 2018

Description:

This session will focus on the newly released dispatch and scheduling module in PSA Web V11. The updates launched in this version improve the overall user experience of the web scheduling & dispatch. Providing additional functionality for marking non-work days/times, default options for appointments. A brand new scheduling tab “tech by day” along with new colour filters for team, tech & status. This release includes new “hover over” options and cleaner calendar interface for multiple appointments same day for larger volumes.

Topic: “Timecards & Approvals” – PSA Web/Mobile

Presenter:

Date: January 23rd 2019

Description:

This session will focus on the updates & changes made to the electronic timecards in PSA Web V11. Timecard approvals have always been a requested item in the web to provide an easier visibility on what was captured for the period, while being able to easily approve at different levels before moving timecard over into payroll. Learn how to properly setup timecard approvals and security so that the burden doesn't all fall on your office admins shoulders.



October 24th, 2018

Topic: "Tools to Better Manage Relationships" – Proven CRM

Presenter:

Date: February 13th 2019

Description: This session will focus on the new CRM add-on to PSA web called Proven CRM. Take your relationship management tools to the next level and provide better tools to track notes, activities, events, expenses, route and email campaigns. Integrates to PSA Web to share job & customer information while being able to see your sales performance by sales person to re-focus their efforts on the sources that generate the best return on your marketing investment.

Topics: "Packout Inventory Made Simple" - Proven Packout

Presenter:

Date: March 13th 2019

Description:

This session will focus on the new Packout add-on to PSA web called Proven packouts. Allowing a cloud based solution for field staff to capture cleaning & replacement inventory items from the field. Track chain of custody from barcoding to boxing and vault storage. While back in the office the application will track the cleaning process and integrate into PSA web for generate of work orders and bills based on services rendered.

Topics: "Photo Documentation Updates" PSA Web/Mobile

Presenter: Mary-Anne Markle

Date: April 17th 2019

Description:

This session will focus on the updates made in PSA Web/Mobile as it relates to photo documentation. Additions to the mobile app will provide the ability to setup & organize photos by sub-folder. Automatic annotations based on folder names with the ability to modify the image when it gets back to the office. This class will also look at the photo reports & e-forms that allow for placement of photos to generate your own professional looking scope documentation out of the web and directly into the hands of your customer.



October 24th, 2018

Topics: “Advanced Scheduling” PSA Web

Presenter: Deb Thomas

Date: May 15th 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.