



Season 4 Last Updated  
July 11<sup>th</sup>, 2019

**Topics: “Xactimate Imports & Work Orders” PSA Web**

**Presenter: Jennifer**

**Date: August 21<sup>st</sup> 2019**

**Description:**

This session will focus on Work Order creation & Importing Xactimate estimates. For companies using the vendor exchange program this class will showcase what steps need to be taken to import an estimate and what options are available to configure prior to importing into PSA web. We will also take a look at the Work Order structure how to manipulate budgets, assigning resources & book trades. As well as the different print options & formats available in the web.

**Topics: “Handling Materials & Consumables” PSA Web**

**Presenter: Mary-Anne**

**Date: September 18<sup>th</sup> 2019**

**Description:**

This session will focus on the materials and inventory sections in PSA Web. Starting with setup for “unit” and “product” creation, building standard materials & services into the system with default costs. We will also showcase how to build your own scope using predefined products directly into Work Orders. Track consumable inventory costs on to your job by selecting or scanning material barcodes.

**Topics: Introduction into Proven CRM**

**Presenter: Kristin**

**Date: October 16<sup>th</sup> 2019**

**Description:**

Proven CRM will opened up a lot more possibilities for your sales & marketing team to become more sales driven. Pull statistics on your most valued relationships, track activities, build routes, configured sales alerts and more. Track email communications, bulk mailer & marketing expenses. Learn how to monitor days since last activity, top referral sources & configure your dashboard with interactive widgets and reports to get the right information needed. Learn about the integration between PSA Job Management and the CRM, how information is shared between the two platforms.



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**Topics: “Job Cost Tracking & Financial Reporting” PSA Web**

**Presenter: Deb Thomas**

**Date: November 13<sup>th</sup> 2019**

**Description:**

This session will focus on the power of Job Costing. What aspects can be leveraged to recognize your committed job costs in real time from materials to labor, subtrade expenses and overhead. Identifying what steps need to be taken to properly allocate while learning how to leverage the “financial tab” along with a number of great web reports that PM’s can go to see how they are performing budget vs actual and the profits associated.

**Topics: “Creating Production Incentives & Reports” PSA Web**

**Presenter: Mary-Anne**

**Date: December 11<sup>th</sup> 2019**

**Description:**

This session will focus on the PSA incentive program. Available to any web users, this module will allow each company to configure & automated incentive calculations for each position in their organization. Using profit scales to calculate commissions, qualify jobs, or build disqualifying factor to improve collection timelines. Learn what options are available in the through company setting to setup your own incentive program. Once defined the incentive reports will re-cap by employee their performance overall by period and showcase their total incentive payout.

**Topics: “Defining Job Lookup & Creation” PSA Web**

**Presenter: Kristin**

**Date: January 22<sup>nd</sup> 2020**

**Description:**

This session will focus on setting “best practices” for job creation. Learning what security options are available for setup, defining dropdowns and what information is critical for entry. We will also be reviewing the options available to contour the job lookup screens based on individual preferences as well as the ability to customize the job entry screen by job type so that only certain field will appear on job creation.



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**Topics: “Reviewing Smart Reports Slides” PSA Web**

**Presenter: Deb Thomas**

**Date: February 19<sup>th</sup> 2020**

**Description:**

This session will focus on the PSA Smart Reporting tools in the web. We will be reviewing the different Smart Reports slides that come with the package, along with what options are available to customize your own reports. Learn how to build slides from scratch and drill down into additional details. Link slides together to contour how information can be followed throughout the system. Learn how to schedule reports and have them email automatically to PSA users. Build your own templates or copying existing slides to provide your team with real time information so they can make real time decisions.