TMASYSTEMS

3rd Quarter Newsletter, 2016

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TMA News

UC 2017 - Save the Date

It's already that time! We start early planning for this event. The team is already hard at work preparing for TMA's 2017 User Conference, our 20th Anniversary! We want to make it even better than last year, so we have new plans in the works for an exciting Conference! Stay tuned for more details.

Conference Dates:

Monday, April 10, 2017	Welcome Reception	5:30PM - 7:30PM
April 11-13, 2017	Conference Sessions	8:30AM - 4:30PM
Friday, April 14, 2017	Bonus Sessions	9:00AM - 10:30AM

Conference Fees:

Early Registration Conference Fee: $750 per attendee
(Payment must be received by December 31, 2016)

Conference Fee: $850 per attendee
(Payment received after December 31, 2016)

TMASYSTEMS
UC17
CELEBRATING OUR
TWENTIETH
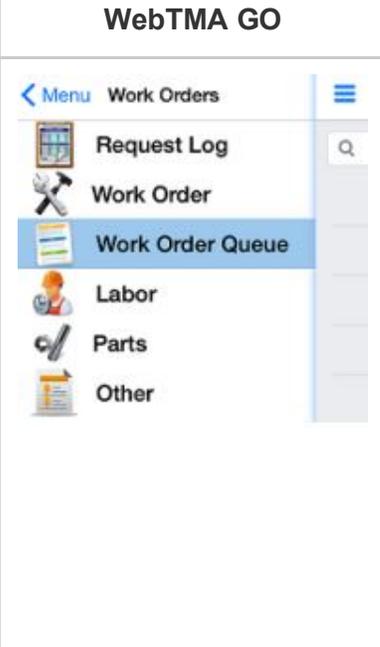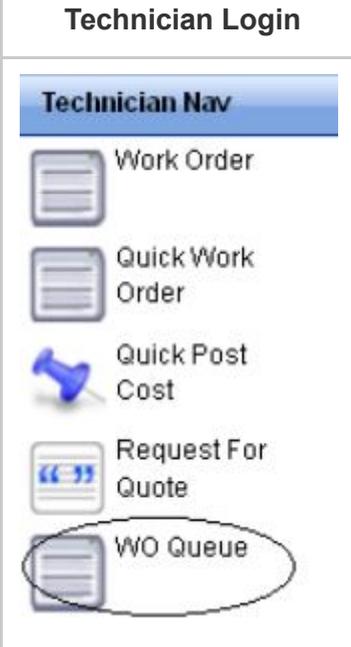USER CONFERENCE

Product Spotlight

Work Order Queue (feature)

The **WO Queue** is a new feature in WebTMA 5.1.x that allows technicians to view a filtered list of unscheduled work orders for their trade via the optional **Technician Login, mobileTMA GO** or **WebTMA GO.** Additionally, if the technician has been granted the appropriate privileges, the technician has the ability to schedule themselves to the work order, which would then remove it from their trade's unscheduled WO queue.

To set-up the WO Queue, follow the below steps:

1. Create a Query on the Browse tab on the WO Record that defines the parameters of the list.
2. Assign the query to a trade on the Trade/Identity tab. Note: Only one query can be assigned to a trade; however, each trade can have a different query.
3. Review the technician's privileges in User Access to ensure the appropriate access has been granted (e.g., allow to schedule work to themselves).

Note: Additional documentation is available within the WebTMA Release Notes (5.1).
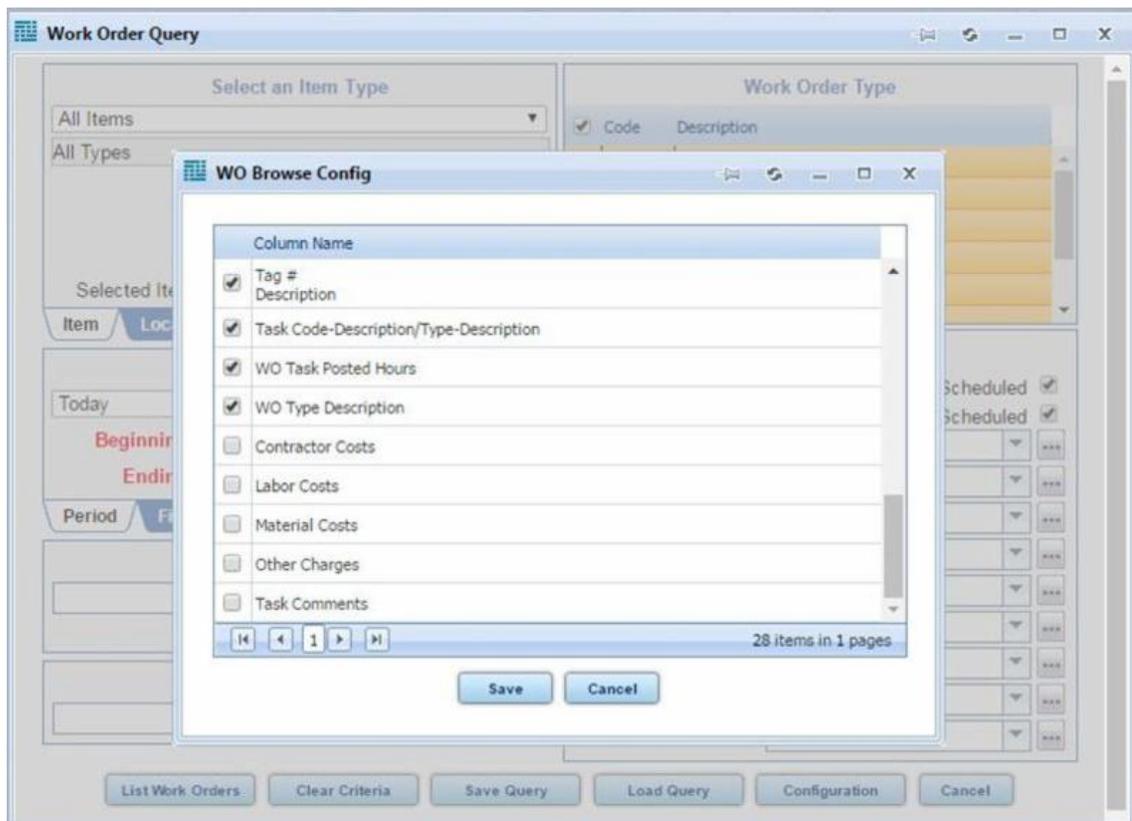
WebTMA GO	mobileTMA GO	Technician Login
Menu Work Orders ☰ Q Request Log Work Order Work Order Queue Labor Parts Other	Main Menu Main Menu Work Order Request Log Work Order Single Task Work Order Work Order Queue	Technician Nav Work Order Quick Work Order Quick Post Cost Request For Quote WO Queue

For more information on the WO Queue feature or any other product, contact sales@tmasystems.com or visit tmasystems.com.

TMA Tech Tips

WO Browse Configuration

In WebTMA 5.1.x, the Work Order Browse feature has been enhanced with new optional columns and the ability to define which columns you want to show in your search results:

1. In the Work Order Browse Query Window, you will now see a Configuration button at the bottom of the page.

2. Click on the button and you will see the available columns. Those with check marks will display. Below are some new highly requested columns that are now available:

   a. Chargeable - Shows if the work order is chargeable
   b. Contractor - Shows the assigned contractor on the work order
   c. General Inspection Icon - Shows the work order has an inspection form
   d. Sub location - Shows the sub location attached to the MWI record
   e. Contractor Costs
   f. Labor Costs
   g. Material Costs
   h. Other Charges
   i. Task Comments

TMA Training

Each month we release free training videos for WebTMA users. This allows you to download and watch the training at your convenience. The videos detail product features, modules, and tricks of the trade that will make your use of TMA products more efficient and rewarding. Instead of shuffling your schedule around to make time for a monthly training, you are now able to take advantage of our presenters' expertise when it is convenient for you.

The videos below have been released to the TMA Support Site at www.tmasystems.net. To be notified about new videos as they become available for download, please contact us at CRM2@tmasystems.com.

WebTMA

July - Capital Planning Workflow

A narrative walk through of the Capital Planning module using a work flow diagram that provides details related to the window and data within each step. The session will illustrate the work flow of this module and provide insights and benefits of the data the module will produce at each step of the process. This is the first of two sessions. Please see the Capital Planning Overview session for the hands-on experience.

August - Capital Planning Overview

This session is an overview of the Capital planning module. During this session we will look at the window and data elements described in the previous workflow session. It is highly recommended that you watch that session before this one so you have a better understanding of the work flows and how the data is used throughout the process. Topics covered:

- Initial Setup
- Deferred work orders to Work Elements

- Capital Planning Audits to Work Elements
- Capital Planning Browse
- Cyclic Renewal to Work Elements
- Work Elements with estimates and ECM savings
- Project Requests and phases
- Capital Budget

September - Accounting in WebTMA

Review the basic WebTMA accounting structure. Learn how you can use WebTMA to track costs whether you charge back to other departments or not. The session walks you through the basic use of the module, which includes establishing accounts, posting costs, and using chargeable work orders.

- Learn the basic fundamentals for setup and use of Accounting features in WebTMA
- Get a brief overview of the Advanced Accounting features that are unlocked by WebTMA Enterprise. This includes rate schedules and sub-ledger functionality
- Includes an in-depth discussion of accounting related to the work order billing process
- See a demonstration of how to review posted charges, correcting errors, and posting to the General Ledger

TMA Software Releases Available

All current versions are available on the TMA Support site. Contact TMA Client Support at 800.228.8765, or via e-mail at support@tmasystems.com, for assistance or questions.

WebTMA Client Hosted Updates

Release Version 5.1.16 (Current Release)

TMA Desktop Updates

Client Server Maintenance Releases
Release Version 8.1.2.13 (Current Release)

Non-Client Server Maintenance Release
Release Version 7.7.16 for non-client server

Meet the New Crew

Bobbie Poindexter - Bobbie has recently returned (she was with us for three years) to our Sales Team as a Senior Account Executive with a primary focus in the Healthcare sector across the western half of the U.S. and Canada. She comes from an extensive IT sales background spanning 25 years with emphasis on solution sales, account management, and new client development. Bobbie resides in Broken Arrow, Oklahoma with her family, husband (Everett) and two spoiled cocker spaniel fur babies. In her free time, she enjoys spending time with her grown children, being outdoors, working in her flower beds, and DIY home improvement projects.

Amber Ray - Amber is the newest addition to our Client Relations department. She recently moved from Texas back to her home state of Oklahoma. Amber was born and raised in Stillwater, Oklahoma, where she also attended Oklahoma State University. She has previous experience as a high school social studies teacher in both Plano ISD and Montgomery ISD. Her six year old daughter, Abigail, will begin first grade this year and keeps her quite busy.

About Us

To learn more about TMA, please visit www.tmasystems.com.

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