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2nd Quarter Newsletter, 2016

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TMA News

2016 User Conference

UC2016 was an enormous success with more than 600 attendees! The event offered participants a variety of informative sessions, workshops, and roundtables that will help them take their organizations to a higher level. There were opportunities throughout the conference to network, collaborate, and exchange ideas with both TMA staff and their peers.



Mark your calendar for April 11th-13th, 2017 for next year's event, our 20th anniversary! You don't want to miss it!

In addition, throughout the year the Client Relations team provides a variety of world-class online educational events for WebTMA users. Take advantage of this opportunity to expand your knowledge of TMA products.

Since the conference, we have spent a significant amount of time reviewing ideas, comments, and suggestions for putting on next year's event as well as concepts related to future product and service offerings. Please feel free to send your comments and suggestions to: UC2017@tmasystems.com.

Product Spotlight

Billing Disputes - An Advanced Accounting Feature in WebTMA Enterprise

If your operation utilizes the chargeback functionality in WebTMA, the new Billing Disputes functionality may be of interest to your organization. With appropriate settings and

permissions, authorized users or requestors can review their charges before they post to the general ledger. This feature is in WebTMA Enterprise only, version 5.1.x or later.

Charges related to Work Orders, Sales Orders, Rentals, Expense Tickets, Fuel & Oil, Utility Tickets, Project Requisitions, Part Transfers, and Journal Entries are eligible for review and dispute.

Additionally, the application supports sending email notices to authorized personnel (i.e., Department Heads) with a hyperlink to the list of charges ready for their review. Even if your organization does not use the e-mail alert, reviewers can examine and dispute charges from:

- the application (user login)
- Service Request module (requestor login)
- iServiceDesk module (secured pages and requestor login)

Authorized users have the ability to dispute one or more charges. These disputes are then available to the designated facilities staff responsible for reviewing and resolving disputes. Please note that the system allows a disputed charge to be posted, since the primary purpose for this feature is to:

- provide facility staff with an intuitive process for identifying potential errors/disputes
- improve customer interaction by providing an online list of charges that are set to be billed to their account(s)

Tip: For clients that do not wish to use the term "Dispute" or allow their customers to submit a dispute, the system provides the flexibility to modify the nomenclature. You can change 'Dispute' to an agreeable term (e.g., Questions) and/or remove the ability to submit a dispute, but continue to provide the list of charges for customer review.

The screenshot displays the 'Identity' application interface. At the top, there are filter buttons: 'All' (selected), 'Reviewed', and 'Pending'. Below this is a 'Mark All Reviewed' button. The main content area shows three account sections, each with a table of charges. The first account is 'A100-B100-C100-D101' with a total debit of 13096.40. The second is 'C100-B100-C100-D100' with a total debit of 13580.00. The third is 'A100-B100-C100-D100' with a total debit of 16347.50. Each table has columns for Transaction Type, Trans #, Request Date, SL Post Date, Debit, Completion Date, and Action Requested. The interface also includes navigation buttons (back, forward, search) and page indicators (e.g., '3 items in 1 pages'). At the bottom, there is a 'Total Debit Amount: 43023.90' and two view options: 'Transaction View' and 'Account View'.

Account	Total Account Debit						
A100-B100-C100-D101	13096.40						
Transaction Type	Trans #	Request Date	SL Post Date	Debit	Completion Date	Action Requested	
Reviewed	Dispute	Work Order	PP-9913429	01/19/2016 11:47	01/19/2016	297.91	Room is too hot Account #: 456677 Build Shelves, Custom Order
Reviewed	Disputed	Work Order	PP-9913894	02/15/2016 00:00	02/29/2016	12708.49	Air-Cooled Condenser
Mark as Reviewed	Dispute	Work Order	PP-9914045	04/06/2016 14:15	04/10/2016	90.00	04/10/2016 09:43 room is too hot. Too hot/cold trouble call.
							3 items in 1 pages
C100-B100-C100-D100	13580.00						
Transaction Type	Trans #	Request Date	SL Post Date	Debit	Completion Date	Action Requested	
Mark as Reviewed	Dispute	Work Order	PP-9914429	04/18/2016 09:49	04/18/2016	13580.00	Too hot/cold trouble call.
							1 items in 1 pages
A100-B100-C100-D100	16347.50						
Transaction Type	Trans #	Request Date	SL Post Date	Debit	Completion Date	Action Requested	
Reviewed	Disputed	Work Order	PP-9914348	04/11/2016 00:00	04/13/2016	2767.50	04/13/2016 08:00 Air-Cooled Condenser
Reviewed	Dispute	Work Order	PP-9914429	04/18/2016 09:49	04/18/2016	13580.00	Too hot/cold trouble call.
							2 items in 1 pages
		Total Debit Amount: 43023.90					

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

Using the Executive Dashboard and Reports to Manage Exceptions

Often we find staff scanning through hundreds or even thousands of line items to locate a few transactions that may be missing data elements or that have just slipped through the cracks. The task can be tedious, extremely time consuming, and in many cases unsuccessful. This results in inefficiency and incomplete data.

Minimize the impact of exceptions to the organization by identifying and defining exceptions as they occur and determining if they can be tracked within the system. Below are a few examples:

- Chargeable work orders without an account
- Unassigned work orders > 2 Days
- Corrective work orders without a failure code

Once defined, dashboard controls, queries, and reports can be created to identify these exceptions. Thus, rather than review a thousand lines to locate problems, manage only the exceptions. As a suggestion, the digital gauges in the Executive Dashboard controls are effective as they do not take up a lot of space (minimizing the number of tabs required), offer drill down capabilities into the data (if using queries), and support email notifications and indicators when defined thresholds have been met.



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

April - Basics of WebTMA

Sometimes a refresher on the basics of WebTMA will awaken you to features and functionality that you may not know about or that may be new to the product. The focus of this training session is on the basic features and functionality of WebTMA's Base Module. Understand how the base module can provide you the full functionality necessary for managing your maintenance operations. This includes:

- Work orders and preventive maintenance program
- Basic navigation through WebTMA along with tips for quick searches
- Brief explanation of important work order fields/tabs
- Data entry tools for work orders like Quick Post and Quick Work Order
- Brief tutorial on adding/editing PM schedules

- Demo of PM Admin features for Batch PM Updates and PM Load Balancing

May - Utilizing WebTMA GO

WebTMA GO can save your organization time and money by providing advanced maintenance management software remotely on an iPad. Learn how to create work orders, requests, and projects; schedule work orders; take inventory; maintain quality inspections; and manage your stockroom by receiving, disbursing, transferring, and requisitioning parts. From your iPad you can:

- Easily manage requests
- Open, close and schedule work orders
- Edit current equipment inventory or quickly add to equipment inventory in the field
- Manage your full stockroom: create requisitions, receive POs, issue parts, transfer parts, and perform cycle counts

June - Introduction to mobileTMA GO

Learn how mobileTMA GO for iOS devices can increase your efficiency. Understand how technicians can spend their time completing work orders, performing PM's, taking inventory, updating meter readings, and completing inspections instead of filling out paper forms or re-typing data. Gain an understanding of the advantages of this dynamic tool that allows you to perform the following tasks from your handheld device:

- Search for work orders, post costs, attach photos and comments, and close work orders
- Update meter readings
- Complete PM checklists
- Create requests or work orders in the field

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 5.1.11 (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

Mike Holmes - Mike has recently joined our Sales team as an Account Executive with a primary focus in Government and Private Sectors. He has held roles in sales and marketing over the last 12 years and brings a strong customer service background to the team. He graduated from the University of Oklahoma and resides in Jenks, OK with his family, wife (Mallory) and daughter (Meryl Emma). He enjoys being a dad and outdoor

activities with his family.

Kyle Guffey - Kyle graduated from Northeastern State University with a Bachelor's in Computer Science where he also worked as a teaching assistant for their Computer Science department. He is part of the Engineering team as a Software Engineer and is responsible for new product development as well as general product maintenance. Kyle enjoys spending his free time with his family and playing music.

About Us

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

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