



## NEWSLETTER

2nd Quarter, 2019

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## TMA News

### UC2019 - Post Event Wrap up

UC2019 was a tremendous success with more than 600 attendees! We would like to thank each of you that attended the conference for your participation and your willingness to exchange ideas and collaborate with your peers and TMA staff. A special thanks goes to our client presenters, who took time out of their busy schedules to prepare session presentations and to convey their knowledge. We hope that each of you were able to gather valuable information that will help you take your organizations to a higher level.



Since the conference, our team has spent a significant amount of time reviewing ideas, comments, and suggestions for next year's event, as well as concepts related to our product and service offerings. The feedback we received is essential for shaping our offerings and the final phases for the development of Project Refresh. Please feel free to send any additional comments and suggestions to: [UC2019@tmasystems.com](mailto:UC2019@tmasystems.com).

If you were unable to make this year's event, it's not too early to start planning for UC2020. So mark your calendar for **April 7th-9th, 2020** for next year's event. You won't want to miss it!

## Product Spotlight

### Bypass the request to work order conversion and scheduling process with the Auto Attendant module

The optional Auto Attendant module is a workflow tool that may be configured to convert requests into work orders based on a set of defined rules. If auto-convert rules are met, a request will be auto-converted to a work order. In a similar manner, if a set of defined auto-schedule rules are satisfied, a work order will be auto-scheduled to a trade or technician. Both processes occur in the background on the server after the transaction has been saved.

Features and benefits of this module include:

- Minimize the administrative burden on work control
- Reduce staff dependency for conversion of after-hours requests
- Auto-convert requests into work orders based on a set of pre-defined rules
- Auto-schedule work orders based on a set of pre-defined rules
- Configure auto-conversion rules based on task, trade, and/or zone

The screenshot shows the 'Auto-Schedule Rule' configuration window in the WebTMA application. The window title is 'Auto-Schedule Rule' and it is powered by TMA Systems. The interface includes a menu bar with options like File, Transactions, Material, Accounting, Organization, Admin, Reports, and Help. Below the menu bar, there are navigation buttons (Home, Logout, Add, Edit, Copy, Delete, First, Prev, Next, Last, Search, Print, Help, Save, Cancel) and a search bar. The main content area is divided into sections for 'Identity', 'Repair Centers', and 'Browse'. The 'Identity' section shows 'Rule #: 4' and 'Description: HVAC Issues'. Below this, there are checkboxes for days of the week (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday) and fields for 'Time-Based', 'Start Time' (07:00), and 'End Time' (04:00). There are also checkboxes for 'Auto-Print' and 'Override Authorization'. The 'Browse' section displays a list of task codes and descriptions, with a table structure:

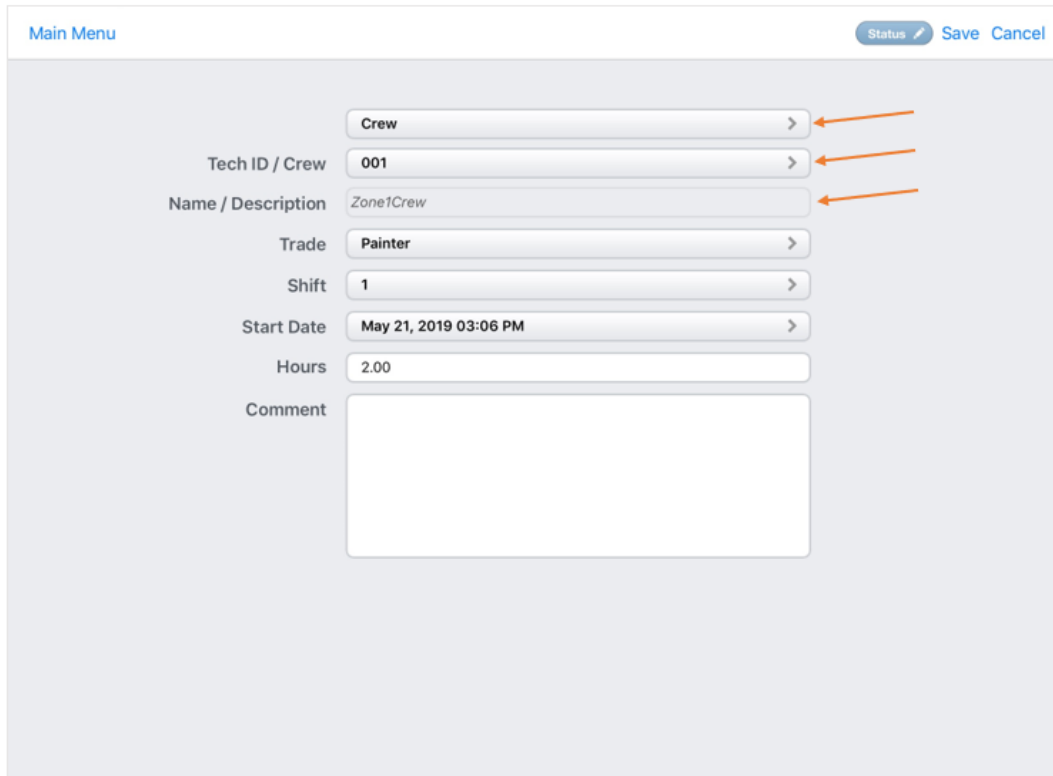
Task Code	Task Description	Zone Related
10530	Too hot/cold trouble call.	<input checked="" type="checkbox"/>
Trade Code Description		
HVAC	HVAC	
1 items in 1 pages		
10565	Repair/Replace Thermostat	<input type="checkbox"/>
Trade Code Description		
HVAC	HVAC	
1 items in 1 pages		
Technician ID Name		
101	George Richardson	
108	Bob Hogan	
2 items in 1 pages		
10550	Building Heating System	<input type="checkbox"/>
Trade Code Description		
PM	Project Manager	
1 items in 1 pages		
Technician ID Name		
0248	Trent Tillman	
1 items in 1 pages		
3 items in 1 pages		

If you are interested in learning more about the Auto Attendant module or any other TMA product, please contact [sales@tmasystems.com](mailto:sales@tmasystems.com) or visit [www.tmasystems.com](http://www.tmasystems.com).

## Enhancement to the WebTMA GO Scheduler

If your organization utilizes crews to perform certain jobs, you may be interested in a new enhancement that was recently made to the Scheduler window in WebTMA GO. A WebTMA GO user (with the appropriate access) now has the ability to select from your list of pre-defined crews and assign the selected crew to the work order. This functionality was introduced in the WebTMA GO release version 2.1.27.

### WebTMA GO Path: Main Menu > Scheduler



The screenshot shows the 'Main Menu' window of the WebTMA GO Scheduler. The window has a title bar with 'Main Menu' on the left and 'Status Save Cancel' on the right. The form contains the following fields:

	Crew	>	←
Tech ID / Crew	001	>	←
Name / Description	Zone1Crew	>	←
Trade	Painter	>	
Shift	1	>	
Start Date	May 21, 2019 03:06 PM	>	
Hours	2.00		
Comment	<input type="text"/>		

Three orange arrows point to the right side of the 'Crew', 'Tech ID / Crew', and 'Name / Description' dropdown menus, indicating the new selection functionality.

Note: For client-hosted clients, prior to upgrading your WebTMA GO application, it is important to confirm the new version of WebTMA GO is compatible with the version of WebTMA your organization has installed..

## TMA Training

Quarterly 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 make your use of TMA products more efficient and rewarding. Instead of shuffling your schedule to make time for a monthly training, you are 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](http://www.tmasystems.net). To be notified about new videos as they become available for download, please contact us at [CRM2@tmasystems.com](mailto:CRM2@tmasystems.com).

### New Videos

**Utilizing Departments in WebTMA** - Departments in WebTMA play a critical role in structuring your organization into more granular components that allow for billing and cost roll-up to

individual departments within your organization. This video goes over the basics of Departments in WebTMA and shows many of the ancillary features associated with setup and utilization.

**Creating Estimates** - Estimates in WebTMA allow you to collect projected costs for work orders, projects, requests, and contracts and then compare the estimated costs to the actual costs when the work is completed. Estimates will help you understand the scope of your work, create more accurate budgets, and keep costs under control. This video will demonstrate the creation of estimates, where they apply within the application, and how they can benefit your organization.

**Transfers in WebTMA** - Transfers in WebTMA allow you to relocate many items in the system from one location to another. This function allows users to update system records when parts, tools, equipment, assets, vehicles, etc. move from one location in the organization to another. This video will show you all the areas within the application a user may perform a transfer. In addition, the video will address the many ancillary options when performing this function. This feature is important in keeping your system records up to date and maintaining an audit history of your transfer details.

## 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](mailto:support@tmasystems.com), for assistance or questions.

### **WebTMA Client Hosted Updates**

Release Version 5.1.41 (Current Release)

### **WebTMA Handheld Device Updates**

(The following are paired with the current release of WebTMA shown above)

WebTMA GO: Release Version 2.1.29 (Current App Store Release)

mobileTMA GO: Release Version 1.3.29 (Current App Store Release)

### **TMA Desktop Updates**

Client Server Maintenance Releases

Release Version 8.1.2.16 (Current Release)

Non-Client Server Maintenance Release

Release Version 7.7.16 for non-client server

## TMA Event Schedule - Where We Are

**Come See Us!**

The TMA team supports and sponsors multiple events and conferences that span across the industries we serve. These are events attended by our many users, clients, and customers throughout the world. Over the next quarter you can find TMA staff at the following events:



Date	Event	Booth #	Location
June 7-10	<a href="#">AAMI Exchange 2019</a>	516	Cleveland, OH
July 8-12	<a href="#">Esri User Conference</a>	2227	San Diego, CA
July 14-17	<a href="#">ASHE Conference and Expo</a>	633	Baltimore, MD
July 15-17	<a href="#">APPA 2019 - Annual Conference and Expo</a>	316	Denver, CO

If you plan on attending one or more of these events, please stop by and see us, or contact your TMA Sales representative ahead of the event to get additional information on where we will be located.

## Meet The Crew

### LoToyia Edwards

LaToyia recently joined TMA as an Accounting Assistant. She brings 10 years of accounting experience to our team. Latoyia is also working towards her bachelor's degree in accounting and is on schedule to graduate in May, 2020. In her spare time, she loves yoga, taking walks, and spending quality time with her daughter (Candace). She is also a die-hard sports fan and enjoys watching football, basketball, and baseball.

### Angela Allen


Angela received a degree in Engineering Physics. However, her calling was to become an accountant and after five years at a telecommunications company she joined TMA's Administration team. When she is away from work, Angela likes to spend time outdoors with her husband and two dogs. She also enjoys dancing, playing video games, and traveling.

## Join The Facebook Group Page

### Connect with WebTMA Users!

Troubleshoot your department issues....  
Learn more about the TMA Systems company culture....  
Stay up-to-date with User Conference information....  
See job opportunities at TMA Systems....

[Learn More](#)



**TMA Systems Group**  
Facebook Group · 84 members

[Join Group](#)

The TMA Systems Group has been created to help connect professionals who use TMA Software. We hope that you will share your knowledge and experience t...

## ABOUT US

To learn more about TMA, please visit  
[www.tmasystems.com](http://www.tmasystems.com).

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**Contact Us**

STAY CONNECTED

