



NEWSLETTER

3rd Quarter, 2018

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TMA News

User Conference 2019
Hyatt Regency Downtown
Tulsa, Oklahoma
April 9th-11th, 2019



As we head into the Fall season, we are preparing for the upcoming 2019 User Conference. UC19 will be an outstanding event with the introduction of "Project Refresh" - a major release of WebTMA. Along with the opportunity to network, collaborate, and exchange ideas with your peers and TMA Staff, we will offer some outstanding activities. On Tuesday evening, April 9th, you will have the opportunity to tour the [Gathering Place](#), a unique private gift to the City of Tulsa. For more information, see the [Gathering Place Story](#).

Through your participation in a variety of sessions, hands-on workshops, and panel discussions, you will bring your knowledge of TMA products to a higher level.

To learn more about the event and topics covered, or to register for UC19, please click on the [TMA User Conference Website](#), contact us directly at UC2019@tmasystems.com, or call 800.862.1130.



Product Spotlight

Billing Disputes - An Advanced Accounting Feature in WebTMA Enterprise

If your operation utilizes the chargeback functionality in WebTMA, Billing Disputes may be of interest to your organization. With the appropriate settings and permissions, authorized users or requestors can review their charges before they post to the general ledger. This feature is available in WebTMA Enterprise only, version 5.1.0 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 your designated staff members who are responsible for reviewing and resolving disputes. Please note that the system allows a disputed charge to be posted, since the primary purpose of 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.

WebTMA
POWERED BY TMA SYSTEMS

Pending Charges Review/Dispute

Home Logout Add Edit Copy Delete First Prev Next Last Search Print Help Save Cancel

Action Menu

Requestor Nav

- WO Request A
- WO Request B
- Key Request
- Event Request
- Reservation Request
- Event Browse
- Reservation Browse
- Material Requests
- Equipment
- Pending Authorization
- Pending Charges Review/Dispute

Identity

All: Reviewed: Pending:

Account: A100-B100-C100-D103 Total Account Debit: 375.78

Transaction Type	Trans #	Request Date	SL Post Date	Debit	Completion Date
Work Order	PP-9934138	01/08/2018 10:19	07/18/2018	125.00	05/30/2018 08:57
Work Order	PP-9934407	07/20/2018 10:53	08/07/2018	250.78	08/07/2018 10:06

Pending Charges Dispute

Work Order # PP-9934138 Total Charges: 125.00

Disputed By: Jane Williams Dispute Date: 08/07/2018

Dispute Comments: They did not complete the job. Still have a broken sink.

Submit Close

Transaction View Account View

Account	Total Account Debit								Mark All Reviewed
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									
Transaction View		Account View							

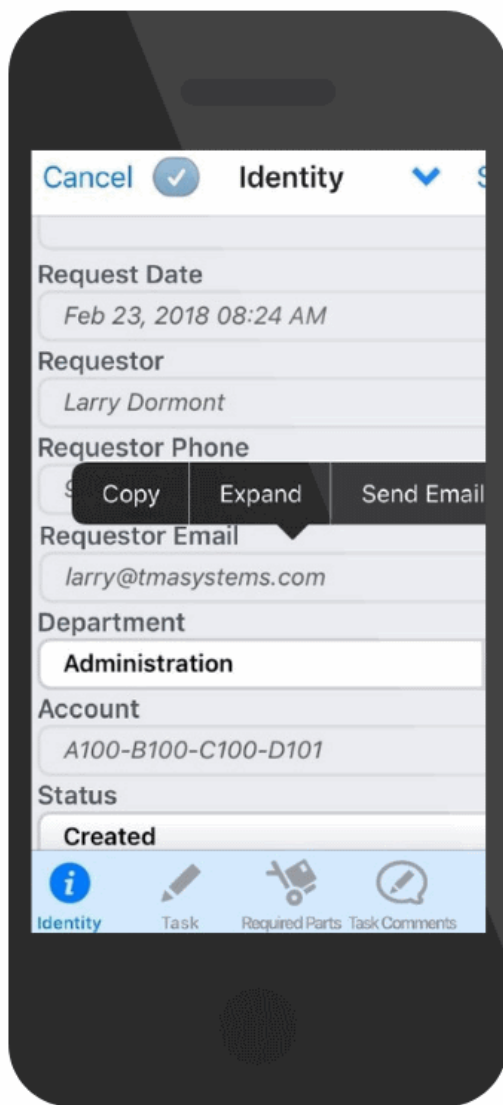
TMA Tech Tips

Send Email to a Requestor via mobileTMA GO or WebTMA GO

From time-to-time, a technician may need to send an email to the Requestor that is associated with a work order. Although the ability to initiate an email to the Requestor within WebTMA is commonly known, many mobile users are unaware that they can initiate an email to the Requestor from within mobileTMA GO and WebTMA GO.

For work orders that have a valid Requestor email, mobile users can initiate an email via a long-press on the "Requestor E-mail" field to view a context menu that includes a "Send Email" option. The Send Email option will open an email window with the "To" address completed. This capability also exists on the Request Log window in WebTMA GO.

In addition, your WebTMA System Administrator can set up an email template in Admin > Email Settings / Mobile Email to establish a format for your e-mail Subject and Message.



← **WebTMA GO: Request Log / Identity Tab**

← **WebTMA GO: Work Order / Identity Tab**

← **mobileTMA GO: Work Order / Identity Tab**

TMA Training

We release free training videos quarterly 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. To be notified about new videos as they become available for download, please contact us at CRM@tmasystems.com.

New Videos

Archive and Purge Module in WebTMA - This video will guide you through The Archive & Purge module's capabilities. The module will enable your organization to select transactions, archive them in groups, and purge when needed. The module provides a variety of features; the most important is the ability to control the amount of data purged by grouping records into

smaller batches. With smaller archive batches, organizations can tag specific types of records and retain the tagged batches even though others are purged from the same date range. To prevent removing records of importance, this module supports the option of marking individual records ineligible for archiving.

Finding Help in WebTMA - There are a multitude of modules and functions in WebTMA, this tutorial helps guide you through the various ways of finding help in the application and beyond. Quick Guides, Complete Help Guides, and How To's are just a few of the topics that will be covered. In addition, gain an understanding of how the Customer Portal can provide you help outside of the application.

Tool Management in WebTMA - This video will walk you through the basic overview of managing Tool inventory. You will learn the basic configuration and uses of the module with best practices in mind. Data entry, data maintenance, and functionality are just a few of the topics that will be covered in this video

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 5.1.36 (Current Release)

WebTMA Handheld Device Updates

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

WebTMA GO: Release Version 2.1.24 (Current App Store Release)

mobileTMA GO: Release Version 1.3.24 (Current App Store Release)

TMA Desktop Updates

Client Server Maintenance Releases

Release Version 8.1.2.15 (Current Release)

Non-Client Server Maintenance Release

Release Version 7.7.16 for non-client server

TMA Event Schedule

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. 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.



Date	Event	Booth #	Location
Sept. 25-26th	NRPA	2221	Indianapolis, IN
Oct. 3-5th	IFMA	1244	Charlotte, NC
Oct 29-Nov. 1	ISSA	3249	Dallas, TX
Nov 6-7th	NFMT Vegas	427	Las Vegas, NV

Meet The New Crew



Andrea Garay
Client Support Specialist

Andrea graduated from Hillsdale College with a bachelor's degree in Biology. She joined the TMA Client Services team in May and is excited to work with clients on a day to day basis. In her free time she enjoys running, camping, and cocktails.

John Burke
Account Executive

With 20 years sales experience and a degree from Michigan State University, John joins our sales team as an Account Executive and works with education clients on the east coast. John and his family relocated to Tulsa from Chicago in 2010. When he is not spending his free time with his wife (Emily) and children (Jack and Lydia), he enjoys snow skiing, golf and indie music concerts.

Brittany Stilley
Accounting Assistant

Brittany recently joined the TMA accounting department and focuses on payables, receivables, and licensing. She is planning on graduating in May of 2019 from Southeastern Oklahoma State University with her Master of Business Administration degree. Brittany loves doing outdoor activities, like fishing and hunting, with her husband (Jeff) and two kids (Jax and Adalynn).

ABOUT US

To learn more about TMA, please visit
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Contact Us

STAY CONNECTED

