



2009 User Groups

TORONTO AGENDA

DAY 1 - SEPTEMBER 24TH

Time	Room 1	Room 2	Room 3
7:30am	Registration and Breakfast		
8:30am	Opening Session Welcome and Introduction Top 10 Tips and Tricks that Everyone can use		
10:00am-10:15am	Break		
10:15am	Return on Investment (key note speaker)	Estimating (key note speaker)	Service: Managing Service Contracts
12:00pm-1:00pm	Lunch		
1:00pm	Accounting: Month End/ Year End Procedures	Projects: Job Reports and Inquiries	Top 10 Tips for 2010 (key note speaker)
3:00pm-3:15pm	Break		
3:15pm	Accounting: Master Report Generator	Service Dispatch, eService, Mobile	Project Management and Change Orders
4:15pm	Jonas Company Overview		
4:45pm	Wrap Up and Review of Evening Agenda		
6:00pm	Dinner		



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T O R O N T O A G E N D A

DAY 2 - SEPTEMBER 25TH

Time	Room 1	Room 2	Room 3
8:00am	Breakfast and Review of Agenda		
8:30am	New Modules: eTimesheets, Digio, eBackup	Service: Work Order Reports	5 Steps to Getting the Most from Your Software (key note speaker)
10:15am-10:30am	Break		
10:30am	What's New in 11.9 and 12.0 (Accounting Modules)	What's New in 11.9 and 12.0 (Job Costing)	Service: What's New in 11.9 (Service Billing)
12:00pm-1:00pm	Lunch		
1:00pm	Best Practices Session Challenges in your Industry		
2:15pm-2:30pm	Break		
2:30pm	Closing Session Development Plan Product Suggestions Customer Feedback		
3:30pm	Wrap Up		

SESSION DESCRIPTIONS

DAY 1 - SEPTEMBER 24TH

Top 10 Tips and Tricks that Everyone Can Use (Presenter: Karoline Lapko)

This session is for all Jonas users and will provide you with 10 tips that are guaranteed to save you time and teach you to use the system more efficiently. Tips and tricks are across all modules in Jonas so there will be something for everyone.

Return on Investment (Presenter: Matt Stevens)

What is the proper metric to govern management decisions and business opportunities? What is the appropriate compensation for a construction firm? How does someone calculate it? These questions and more will be answered.

- Is our business unique?
- An ROI Quiz
- The calculation – (shown live)
- What are the components
- Is ROI the final arbiter for all decisions?
- Other compelling considerations

This information benefits: Construction Executives, Shareholders, Business Development Professionals, Project Managers, Field Supervisors, Senior Estimators and others who manage revenue and cost.

Estimating (Presenter: Bartley Mollohan)

In this session you will see the tremendous benefits of automating your estimating and going paperless with an on-screen takeoff tool called ProEst. The ProEst software works for all trades and is simple to setup. Free trials of the software will be available for download after the session.

Service Billing: Managing Service Contracts (Presenter: Steve Ecclestone)

In this session we will focus on increasing revenue and profitability. Emphasis will be placed on common problems and complex areas including revenue recognition, contract profitability, setting up defaults, automation and fast renewals. Additionally we will teach you how to use the new tasking module in Service Contracts that allows you to print out checklists for your technicians.

Accounting: Month end/Year End Procedures (Presenter: Karoline Lapko)

This course will review the monthly and year-end housekeeping procedures in General Ledger, Purchase Orders, Accounts Receivable, Accounts Payable, Inventory, Job Costing, Service Billing and Service Contracts. We will take you through archiving and completing work orders, purchase orders, closing out jobs, resolving receivables that will never get paid, checking suspense accounts, reviewing outstanding deposits, physical inventory counts and adjustments. Balancing accounts and ensuring financial reports are in balance will be a key topic

Job Costing: Job Reports and Inquiries (Presenter: Steve Ecclestone)

This course will cover everything there is to know about creating job cost reports using the report generation module including some of the new report options that have recently been added. You will quickly how to use the data fields, set conditions and understand the coding and secure key reports. We will teach you the fundamentals of reporting and running key job inquiries to get timely information about your jobs.

Top 10 Tips for 2010 (Presenter: Matt Stevens)

As the economy has cooled and contractors are looking for all available work, there are some who are coming from other regions and market sectors competing against you. Some are fighting unfairly to win projects. This small group threatens to diminish your business even further.

Attend our seminar on the "Top 10 Tips for 2010 – Fighting Unfair Competition" and fight back even harder. We will cover:

- What are the 10 strategies
- Why do they work
- How to implement them
- How to keep the edge you have earned

Accounting: Master Report Generator (Presenter: Steve Ecclestone)

We will explain how to use this very underutilized reporting tool. Pro-forma cash flows, divisional reports, daily receipts/expenditures, mixing GL/JC/PO data on the same report with additional calculations. The tool is simple to use and we will provide examples of effective reports you can generate.

Service: Dispatch, eService, Mobile (Presenter: Andrew Cole)

The Jonas Paperless Service Management system combines dispatch, mobile and web based solutions in one seamless solution that is fully integrated with a back-end accounting system. Customers log work orders via the web, work orders appear on the

dispatch board and are sent to your technician's mobile device while in the field. Eliminate the use of paper, increase dispatcher and technician productivity and reduce service billing cycles all while differentiating your company from the competition with online tools for your customers.

Project Management and Change Orders (Presenter: Brian Andrew)

This will be an overview of the comprehensive change order management system. You will understand the effects of a change order on your job estimate, subcontractor and progress billing. An overview of the new Project Management module will be expanded on. Key reports and flags will be reviewed to help you understand the controls available. Also, you will quickly learn how to enter, print, e-mail and track RFI's, Submittals and Transmittals.

DAY 2 - SEPTEMBER 25TH

New Modules: eTimesheets, Digio, eBackup (Presenter: Karoline Lapko)

This session will cover the importance of protecting your data using various back-up methods, followed with an overview of our latest products that can help you save valuable time and move you one step closer towards becoming a paperless office. These include: eBackup, Digio Jonas, eTimesheets

Service Billing: Work Order Reports (Presenter: Angela Brutto)

This course will cover everything there is to know about creating work order reports using the report generation module including some of the new report options that have recently been added. You will quickly how to use the data fields, set conditions and understand the coding and secure key reports.

5 Steps to Getting the Most from Your Software (Presenter: Brian Andrew)

This will be based on an article published by Brian Andrew in the Construction Financial Management Association's *Building Profits* magazine. You will discover five steps to get the most out of Jonas Software in your organization. These five steps are: Take an Inventory, Evaluate Current Use, Consider Factors Affecting Your Software Utilization, Develop an Action Plan, and Establish Procedures for Continued Utilization.

Accounting: What's New in 11.9 and 12.0 (Presenter: Angela Brutto)

This session will cover new features in the current version 11.9 and the next version 12.0. It will focus on features related to the accounting modules including: General Ledger, Accounts Payable, Accounts Receivable and Payroll.

Job Costing: What's New in 11.9 and 12.0 (Presenter: Brian Andrew)

This session will cover new features in the current version 11.9 and the next version 12.0. It will focus on features related to the job modules including: Job Costing, Change Order Management, Estimates and Progress Billing.

Service: What's New in 11.9 and 12.0 (Presenter: Andrew Cole)

This session will cover new features in the current version 11.9 and the next version 12.0. It will focus on features related to the service modules including: Service Billing, Flat Rate, Service Contracts and Dispatch Board.