Dataforma

2025 PSU AGENDA

11 - 13 - 25

*Group sessions are designed to allow everyone to see Dataforma specific functionality and to discuss issues with others that may not be Dataforma specific. Tracey Donels and Brian Cook will host webinars post PSU to recap all sessions.

DAY 1

Time	Session
9 - 9:30	**INTRODUCTION, LOGISTICS**
9:30 - 10:30	**GROUP SESSION #1, SALES TIME!** *Brand New - Sales Module (customizable dashboard with visually appealing graphs/reports
10:30 - 10:45	**MOVE TO BREAKOUT ROOMS** (Bathroom Break)
11 - 11:45	**ROUNDTABLE SESSION #1** Hiring / Training Field Employees, Residential, Templates, Preventative Maintenance, What is a Super User
12 - 1	**LUNCH**
1:15 - 2	**GROUP SESSION #2, PROJECT MANAGEMENT** Dataforma is no longer 'just for service'! See what you've been missing.
2 - 2:15	**MOVE TO BREAKOUT ROOMS** (Bathroom Break)
1:15 - 2	**ROUNDTABLE SESSION #2** Hiring / Training Field Employees, Residential, Templates, Preventative Maintenance, What is a Super User
3 - 3:15	**BACK TO GROUP ROOM** (Bathroom Break)
3:15 - 4	**GROUP SESSION #3, ESTIMATING / INSPECTIONS** Estimating module...almost ready! We added the ability to send proposals directly from the mobile app. Send a link, see updates when the proposal is signed.
4:30 - 6:30	**HAPY TIME!!!** Location Info

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DAY 2	
9 - 9:30	**RECAP OF DAY 1, AUDIENCE THOUGHTS ON LOCATION FOR NEXT PSU?**
9:30 - 10:15	**GROUP SESSION #4, INTEGRATIONS / API** QXO & More Accounting integrations. What is available now and what is coming to DF in 2026!
10:15 - 10:30	**MOVE TO BREAKOUT ROOMS** (Bathroom Break)
10:30 - 11:45	**ROUNDTABLE SESSION #3** Hiring / Training Field Employees, Residential, Templates, Preventative Maintenance, What is a Super User
12 - 1	**LUNCH**
1 - 2	**GROUP SESSION #5, WHAT ARE YOU LOOKING FOR?** We want to hear from you! We would like your feedback for new functionality and tweaks to improve how DF curently functions. **THANK YOU FOR COMING! ENJOY SCOTTSDALE**