



WHO BUT
W.B.MASON



► The PKaser Demo

Refactored/Developed By: Christopher Durham Jr.
Associate App Support Engineer

ABF
Freight



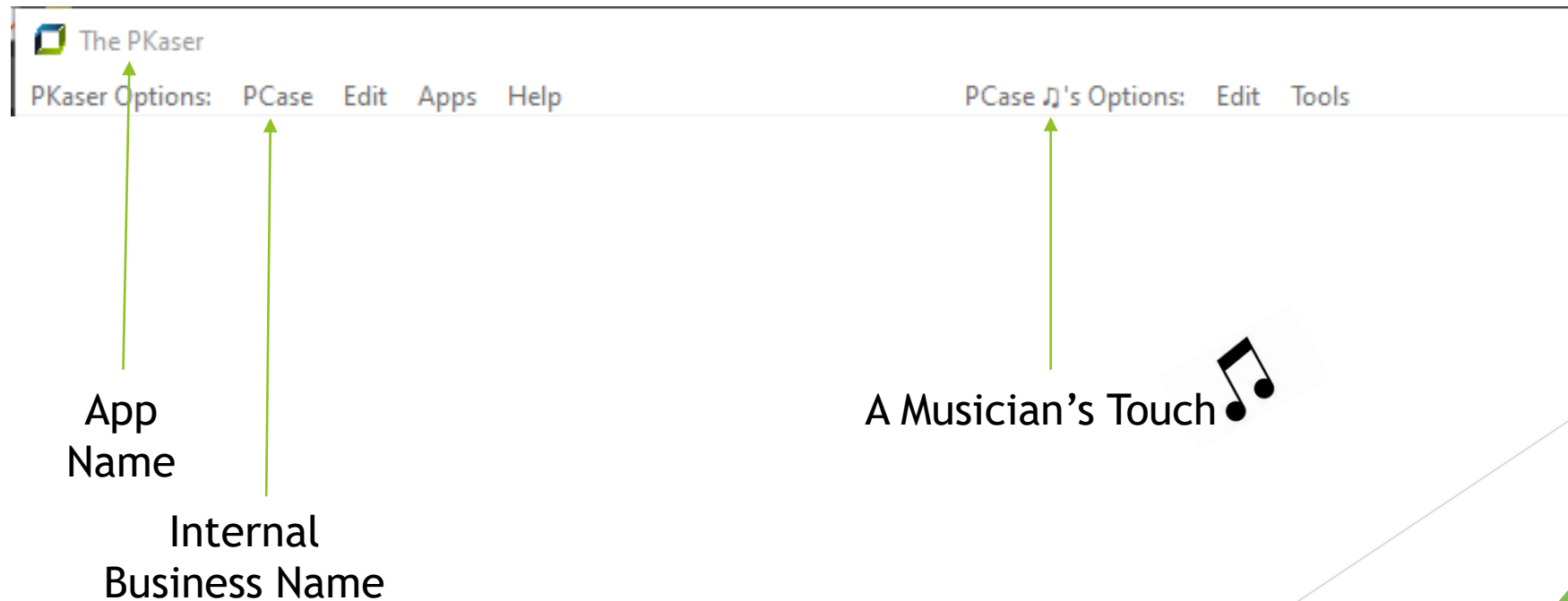
What's The Problem? How Are We Solving It?

- ▶ Engineer's need a centralized location to track, and maintain project information.
- ▶ Engineer's get immediate updates on potential case conflicts.
- ▶ Uniform way for management to easily identify/review engineer work.
- ▶ Stop Revenue From Running Away!



So What's With The Name?

- ▶ It's simple...Billtrust has a thing for spunky people, and spunky app names.
- ▶ “The PKaser” references the name of the application.
- ▶ “PCase” references the internal technical name for Parent Case.





Core Features

- ▶ Quick Links
- ▶ Quick View
- ▶ Edit/Push
- ▶ SF Info
- ▶ FTP Root Watch
- ▶ PCase List
 - ▶ Current Cases
 - ▶ Archived Cases
- ▶ PCase Notes
- ▶ Tools
 - ▶ Timestamp
 - ▶ SF Comment
 - ▶ Timer
- ▶ Potential Conflicts
- ▶ PKaser Options

“Every problem is a gift—without problems we would not grow.” - Anthony Robbins



KEY Features

► Potential Conflicts

- Application users will get a real time view of potential case conflicts.

► Time Tracker

- Get accurate information on time spent for Clarizen updates.

► Kazoo Integration

- Hard link allows end user to update Kazoo when the achievement is fresh in mind.



► PCase Notes

- Central location to take notes
- Organized workflow
- Easily update and manage case work
- Creates uniformity among engineer's
- Timestamps
 - Uniform Salesforce comments
 - Accuracy
- Increases responses to management when issues do arise.

It all starts with a great idea and teamwork.

Quick Links

PCase

FTP Root

SalesForce

SRD

Quick View Edit/Push

PCase Folder

Z:\IT Documents\QA\P2814026

- APPLICATION
- DELIVERABLES
- DML
- FDT
- FTPROOT_LOOKUP
- IG_CustFiles
- NACHA
- OBP_CustFiles
- OUTPUT
- QUOTE_SOW
- SAMPLE_BILLS
- SAMPLE_DATA
- SRD
- UAT
- UNIT_TEST
- VALIDATION

Potential Conflicts

- NOCONFLICTS

Info

PPG - Invoice and Statement Build

Refresh

P2814026 Last Modified: 2021-05-24 14:10
02899941 Current Owner: Christopher Durham
PPG Case Owner: Matthew Pelliccia

FTP Root

CDurham - PCase J's

CDurham_2021-05-28

Enrolled Accounts

CDurham_2021-05-27

Confirmed Template Notes Tab

Invs8070113

Stmts8070123

All rows designed for BT Eng to configure.

Invoices 8034

Statements 8036

Will be working through logic notes tab and logos next available business day.

CDurham_2021-05-26

Batch Running Errors:

Resolved BT_ROUTE issue, by linking GMC BT_ROUTE to ROUTING to process through biscuit.

Batches:

Invs8070113

Stmts8070123

Confirmed Inv Mapping Tab

Row 31, and Row 38 left to update

Confirmed Stmt Mapping Tab

Row 26 left to update

Need to confirm Template Notes, and Logic Notes tab.

CDurham_2021-05-24

PCase List

Current

Archive

PCase	CSR Name
P2812946	THEGRANITEGROUP
P2667296	EXTECHBUILDING
P2815272	CCMHOCKEY
P2817918	WERNERELECTRIC
P2814026	PPG
P2918278	GLOBALINDUSTRIAL
P2874997	ALTORFER
P2812961	HOLTELECTRICALSUPPLY

New

Update

Archive

THANK YOU FOR YOUR TIME.

Stay Tuned For Live Demo

