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Your trusted partner for seamless FinancialForce implementations.



Training Course: Introduction to FinancialForce PSA

FinancialForce PSA is a powerful application to manage your professional services organization. This interactive instructor lead course emphasizes how to use standard PSA functionality end to end, following standard industry processes. During the course, you will learn professional services concepts and terminology and how PSA realizes them. You will also learn the basic skills and gain the hands-on experience required to begin using PSA.

For companies new to PSA, this introduction can be modified to use your real-life examples to prepare for requirements and implementation working session, as well as for go-live training for other users.

Learn professional services concepts and terminology and how PSA realizes them.

Learning Objectives:

- Describe the structure of PSA and all its major functions.
- Describe the high level steps performed to take a project from Opportunity to closure in PSA.
- Understand the basic responsibilities of a Manager, Project Manager, and Time & Expense Entry user in PSA.
- Identify different project types and scenarios in PSA and determine how to structure the system to suit your business needs.

Understand the basic skills and gain the hands-on experience required to begin using PSA for your organization.

Pre-requisites

Participants should be familiar with the Salesforce platform and its basic features.

Audience & Duration

- This course is primarily intended for Professional Services Managers, Salesforce and PSA Administrators, and PSA implementation project team members. Project Managers, Financial Managers, and Operations personnel will also benefit.
- Virtual Instructor-Led sessions conducted in 3-4 conferences lasting 2-3 hours each, totally approximately 8 hours.



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1. Introduction

- Overview
- Goals & agenda

2. Overview of PSA Objects

- PSA Structure and all its major functions
- PSA Objects and their functions
- Regions, Practices, and Groups
- High level implementation process

3. Full End-to-End User Experience

- Move projects from opportunity to closure
- Overview of end-user key functionality

4. Time Periods, Calendars, User Types & Responsibilities

- Time periods in PSA
- Work Calendar functions • Defining holidays in PSA
- User types and roles

5. Creating & Maintaining PSA Resources

- Creating a resource
- Resource & resource page configuration
- Making resources inactive (off-boarding)
- Permission controls

6. Project Setup & Management

- Project Creation and Closure
- Project billing types
- Project milestones & budgets
- Global projects

7. Assignments, Schedules, & Resource Planner

- List views
- Resource assignments
- Scheduling
- Project planner

8. Timecards & Expense Report Creation

- Timecard entry form & process
- Expense report entry form & process
- Timecard and expense report recall

9. Timecards & Expense Report Approvals

- Timecards – approval & rejection
- Expense Reports – approval & rejection

10. Billing & Invoice Management

- Billing process
- Billing event
- Finance actions
- Miscellaneous adjustments

11. Resource Utilization, Missing Timecards, Actuals, and Backlog

- Utilization calculations & reports
- Missing timecards report
- PSA Actuals
- Backlog

12. Report & Data

- Reporting types
- PSA data types