



FinancialForce PSA Basics

Thursday, July 21, 2022 - 1:00 PM ET



SPEAKER

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Agenda

- Understanding the Flow: Marketing to Services
- Flow Execution: The Missing Link
- Seamless Execution Using PSA
- PSA Business Process Overview
- PSA Ecosystem
- Salesforce Objects
- FinancialForce Objects
- Different Roles in PSA
- Create a Project

Understanding the Flow: Marketing to Services



Attract and Acquire Leads

by SEO, paid search, social media & blogging

Engage and Nurture Leads

by hosting web content and capturing lead information via forms

Filter Leads as Qualified for Sales

and finally acquire them as customers

Create Project and Deliver

using the project management software

Customer Support

ensure ongoing support for customer satisfaction

Flow Execution: The Missing Link



1 Attract and Acquire Leads

2 Engage and Nurture Leads

3 Filter Leads as Qualified for Sales

4 Create Project and Deliver

5 Customer Support

01

Attract and Acquire

02

Engage and Nurture

03

Closure

04

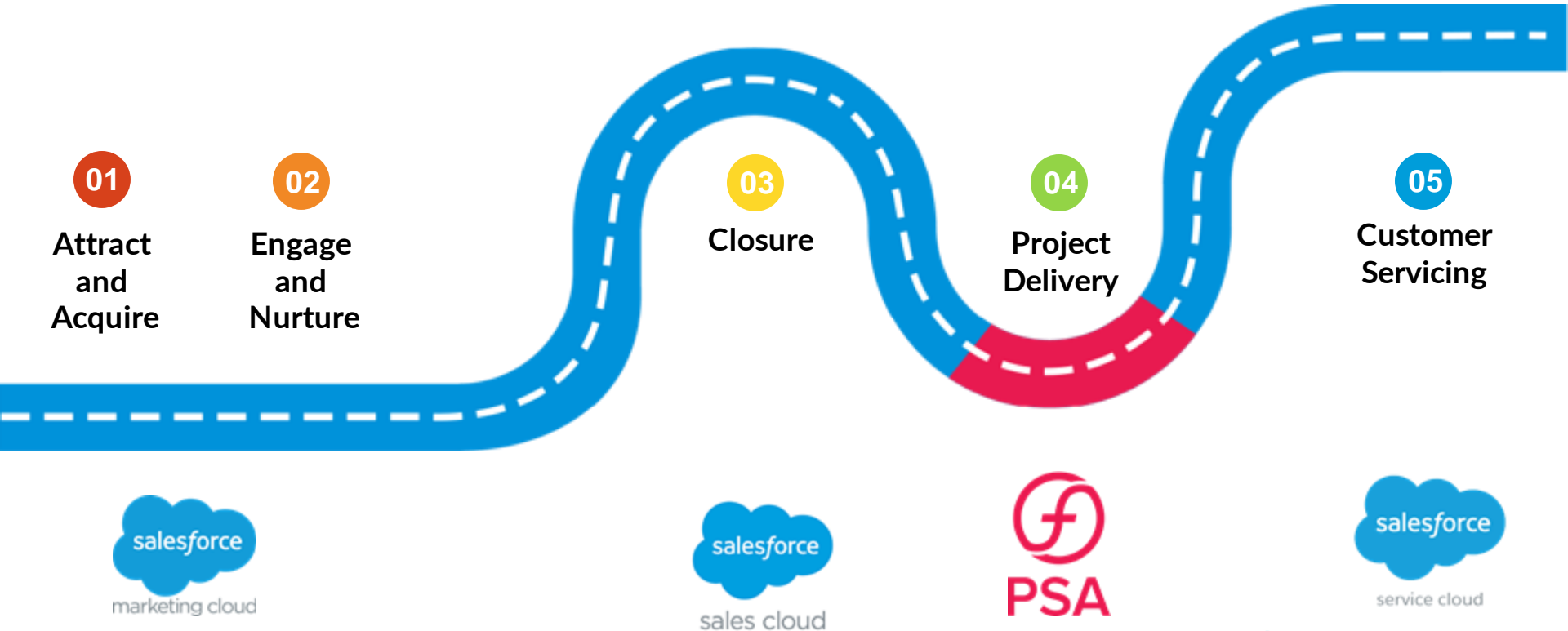
Project Delivery

05

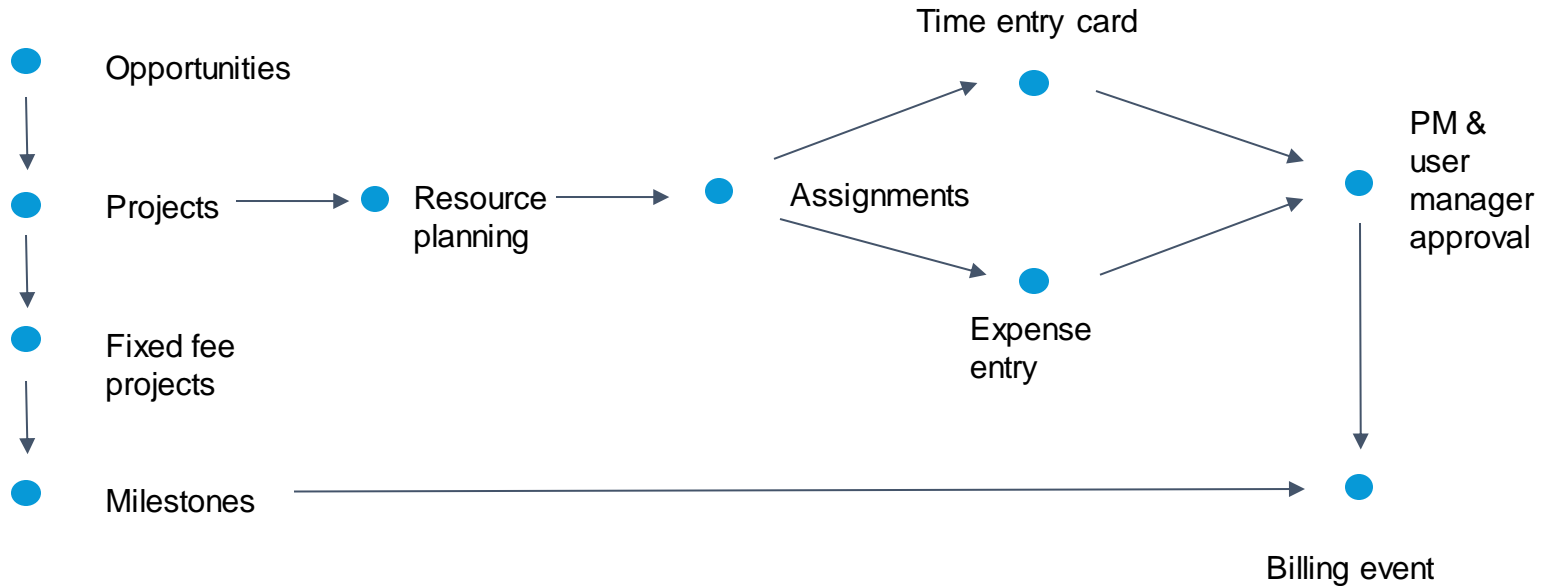
Customer Servicing



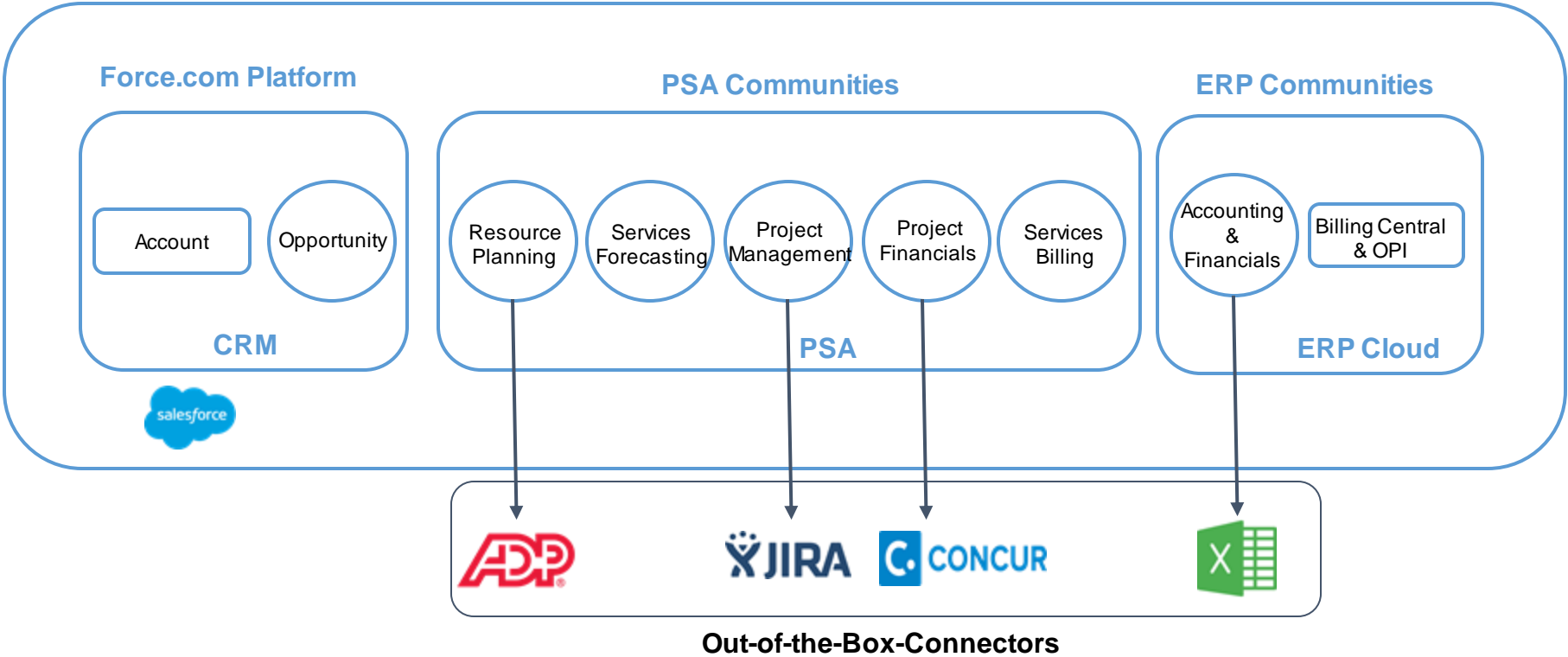
Seamless Execution Using PSA



PSA Business Process Summary



PSA Ecosystem



Salesforce Objects

01

Product

List of items to sell or deliver

03

Contact

Person associated with an account

02

Account

Organization of any type

04

Opportunity

Chance to generate revenue

PSA Objects



PSA Roles



SFDC System Administrator

Adds PSA users to the system; creates and manages user profiles; creates and assigns roles.



PSA Administrator

Configures the PSA installation; sets up time periods, holidays, work calendars, regions, practices, and groups



Project Manager

Manages projects, assignments, schedules; initiates requests resources; creates and manages budgets.



Operations/ Resource Manager

Adds resources; sets permission controls; creates projects; assigns resources; creates budgets; manages utilization; sets up skills and certifications and skill zones; sets up rate cards



Services Management/ Delivery Manager

Manage the actuals, booking/staffing, and utilization.



Sales

Creates accounts and opportunities



Finance

Generates billing events to invoice the customer; manages revenue recognition.



Internal Resource / External Resource

Performs project activities; submits timecards, and expense report.

Create A Project



How to Create a Project from a Template?

The screenshot displays the AplyPro dashboard interface. At the top, there is a navigation bar with a search bar on the right containing the text "Search...". Below the navigation bar, a menu is open, showing various tabs: "PSA", "Home", "Chatter", "Accounts", "Contacts", "Opportunities", "Projects", "Resource Requests", and "Timecard". A red circle with the number "1" is placed over the "Opportunities" tab. Below the menu, a search box contains the text "oppo". A red circle with the number "2" is placed over the search box. Below the search box, a dropdown menu is visible, showing "Apps" with "No results", and "Items" with "Opportunities" highlighted and "View All" below it. A red circle with the number "3" is placed over the "Opportunities" item in the dropdown. The background of the dashboard shows a light blue area with a green line graph and a "GOAL" indicator.

There are two ways you can find the Opportunities list

1. Click on the Opportunities tab on your dashboard.
- Or
2. Go to your App Launcher.
3. Search for Opportunities.

The screenshot shows the AplyPro interface with the 'Opportunities' tab selected. A dropdown menu is open for the 'Recently Viewed' list view. The menu items are: All Opportunities, Closing Next Month, Closing This Month, My Opportunities, New This Week, Opportunity Pipeline, Recently Viewed (Pinned list), Recently Viewed Opportunities, Services Opportunities, and Won. A red circle with the number '1' is placed over the dropdown arrow next to 'Recently Viewed'. A red circle with the number '2' is placed over the 'Services Opportunities' option, which is highlighted by a mouse cursor. The background shows a table with a 'Stage' column and a message: 'You haven't viewed any opportunities recently. Try switching list views.'

Changing the list to a Service Opportunities list

1. Click on the drop down feature next to Recently Viewed.
2. Select Services Opportunities



All Search Opportunities and more...



PSA Home Chatter Accounts Contacts Opportunities Projects Resource Requests Timecards Expense Reports Skills Matrix Reports Dashboards

Opportunities
Services Opportunities

New Printable View Create Invoices

50+ items · Sorted by Opportunity Name · Filtered by All opportunities - Practice · Updated a few seconds ago

Search this list... [Settings] [List View] [Refresh] [Edit] [Share] [Filter]

	<input type="checkbox"/> Opportunity Name ↑	Account Name	Company	Amount	Close Date	Stage	Opportu...
1	<input type="checkbox"/> 4UX	FinancialForce		GBP 1,000,000.00 (USD 1,492,537.31)	6/20/2018	Closed Won	EAren
2	<input checked="" type="checkbox"/> AbbeyGorton	Ironzel		GBP 324,250.00 (USD 408,099.31)	9/30/2020	Id. Decision Makers	EAren
3	<input type="checkbox"/> AnalytIQ	Celestial Blue		EUR 256,835.00 (USD 291,917.33)	7/31/2020	Closed Won	EAren
4	<input type="checkbox"/> Arknight	Bravent		GBP 765,950.00 (USD 964,020.56)	9/27/2019	Closed Won	EAren
5	<input type="checkbox"/> Astrojo	JoJo		USD 23,456,300.00	1/5/2018	Closed Won	EAren
6	<input type="checkbox"/> Atlas	Titan12		EUR 119,980.00 (USD 136,368.65)	2/28/2019	Closed Won	EAren
7	<input type="checkbox"/> Aura	Titan12		EUR 593,000.00 (USD 674,000.73)	5/31/2019	Closed Won	EAren
8	<input type="checkbox"/> Avantio	Stralix		AUD 610,000.00 (USD 426,144.30)	7/31/2020	Closed Won	EAren
9	<input type="checkbox"/> Bellous	Econoodle		EUR 320,000.00 (USD 426,666.67)	7/31/2018	Closed Won	EAren

From the Service Opportunities list, select an Opportunity.

1. Let's take "AbbeyGorton" for this example.

PSA Home Chatter Accounts Contacts Opportunities Projects Resource Requests Timecards Expense Reports Skills Matrix Reports Dashboards

Opportunity **AbbeyGorton** + Follow Edit New Opportunity New Case

Activity Details Chatter

Log a Call New Task New Event Email

Recap your call... Add

Filters: All time · All activities · All types

Refresh · Expand All · View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Related

- Quotes (0)
- Orders (0)
- Sales Invoices (0)
- Sales Credit Notes (0)
- Revenue Forecasts (0)
- Revenue Forecast Batch Logs (0)
- Resource Requests (0)
- Projects (0)
- Issues (0)

1 Create Project

2 Create Project From Template

Scroll down to the project related list to choose a type of project

1. Click on Create Project to start a project from Scratch.
2. Or click on Create Project From Template to pick a relevant template. (We'll go with this option for reference)

Select Project Template

Filter

1000

Project Templates

	PROJECT NAME	PLANNED HOURS	ACCOUNT
<input type="radio"/>	3 Month T&M AUD Template	1,000.00	
<input type="radio"/>	3 Month T&M GBP Template	1,000.00	
<input type="radio"/>	3 Month T&M EUR Template	1,000.00	
<input type="radio"/>	3 Month T&M EUR Template Spain	1,000.00	
<input type="radio"/>	3 Month T&M USD Template	1,000.00	
<input checked="" type="radio"/>	Services Type Project - Fixed Price	1,000.00	
<input type="radio"/>	Services Type Project - Time and Materials	1,000.00	

3

Select a project template

1. Use the filter field to filter based on the information available on the list columns. Example: If we select 1000, all the projects with 1000 hours are displayed in the planned hours column.
2. Select a project template you want to use.
3. Click Select.

Create Project

Help for this Page ?

Copy fields from the project template (as configured by your administrator) to create a new project.

Project Details (Copied From: Services Type Project - Fixed Price)

Create Project Cancel

Create Project

Required Information

Project Name

Project Manager

Currency

Account

Template Project Start Date 1/1/2020

Start Date [11/24/2020]

[Update Related Record Dates](#)

All required fields must be completed before dates can be updated

End Date [11/24/2020]

Planned Hours

Active

Region

Billable

Practice

Time Excluded

Group

Time Credited

Billing Type

Project Type

Opportunity

Opportunity Owner Emily Arentt

Select All Related Records

Update all the relevant details in the selected project template

1. Enter information such as the correct start date for your project.
2. Then, click on Update Related Record Dates underneath the start date.



All required fields must be completed before dates can be updated

Planned Hours
Region
Practice
Group
Billing Type
Opportunity [AbbeyGorton](#)

Active
Billable
Time Excluded
Time Credited
Project Type
Opportunity Owner

1

Select All Related Records

Resource Requests from Template Budget Details Milestones from Template Milestones from Opportunity Products Project Tasks Risks

Resource Requests from Template

6 of 6 Selected

<input checked="" type="checkbox"/>	REQUESTED HOURS	RESOURCE ROLE	SUGGESTED RESOURCE	PRIMARY SKILL / CERTIFICATION	START DATE	END DATE	NOTES	CURRENCY ISO CODE
<input checked="" type="checkbox"/>	40.00	Architect			12/7/2020 [11/24/2020]	12/23/2020 [11/24/2020]		USD
<input checked="" type="checkbox"/>	40.00	Business Analyst			12/7/2020 [11/24/2020]	12/30/2020 [11/24/2020]		USD
<input checked="" type="checkbox"/>	105.00	Consultant			12/7/2020 [11/24/2020]	3/7/2021 [11/24/2020]		USD
<input checked="" type="checkbox"/>	118.00	Senior Consultant			12/7/2020 [11/24/2020]	3/7/2021 [11/24/2020]		USD
<input checked="" type="checkbox"/>	121.00	Project Manager			12/7/2020 [11/24/2020]	3/7/2021 [11/24/2020]		USD

Displaying 1-5 of 6 records

First Previous Next Last

Show 5 Records Per Page

2

Scroll down the project template to see related items

1. If you do not need certain items, deselect Select All Related Records.
2. Individually select the required items you need from the record list.

PSA Home Chatter Accounts Contacts Opportunities Projects Resource Requests Timecards Expense Reports Skills Matrix Reports Dashboards

Create Project

Help for this Page ?

Copy fields from the project template (as configured by your administrator) to create a new project.

Project Details (Copied From: Services Type Project - Fixed Price) 1 Create Project Cancel

▼ Create Project Required Information

Project Name	AbbeyGorton-Project	Project Manager	
Currency	British Pound	Account	Ironzel
Template Project Start Date	1/1/2020	End Date	3/8/2021 [11/24/2020]
Start Date	12/7/2020 [11/24/2020]	Active	<input checked="" type="checkbox"/>
Update Related Record Dates			
All required fields must be completed before dates can be updated			
Planned Hours	1,000.00	Billable	<input checked="" type="checkbox"/>
Region	United Kingdom	Time Excluded	<input type="checkbox"/>
Practice	Services	Time Credited	<input type="checkbox"/>
Group		Project Type	Customer Project
Billing Type	Fixed Price	Opportunity Owner	User Emily Arentt
Opportunity	AbbeyGorton		

Select All Related Records

Scroll back to the top of your project template

1. Once you are happy with the information, click on Create Project.

Contact Us

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