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FinancialForce PSA Basics

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

SPEAKER

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| COO, AblyPro

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

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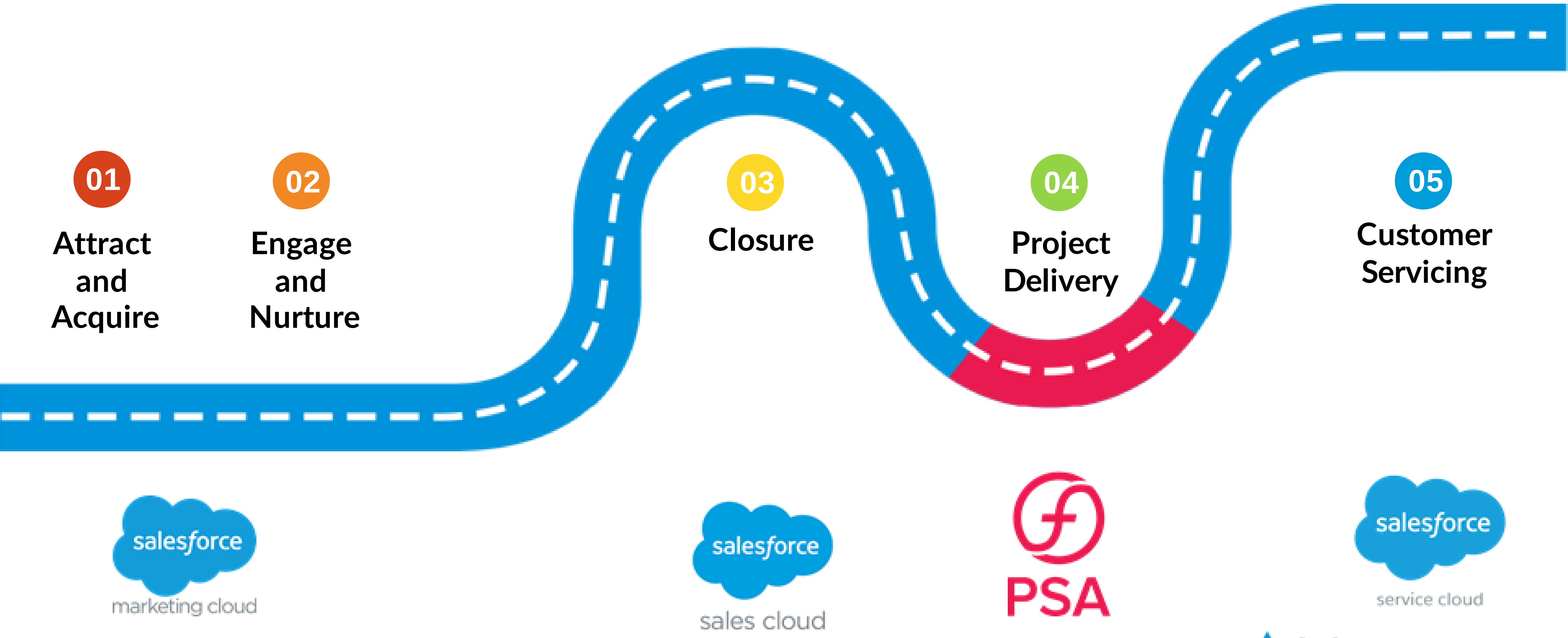
Seamless Execution Using PSA



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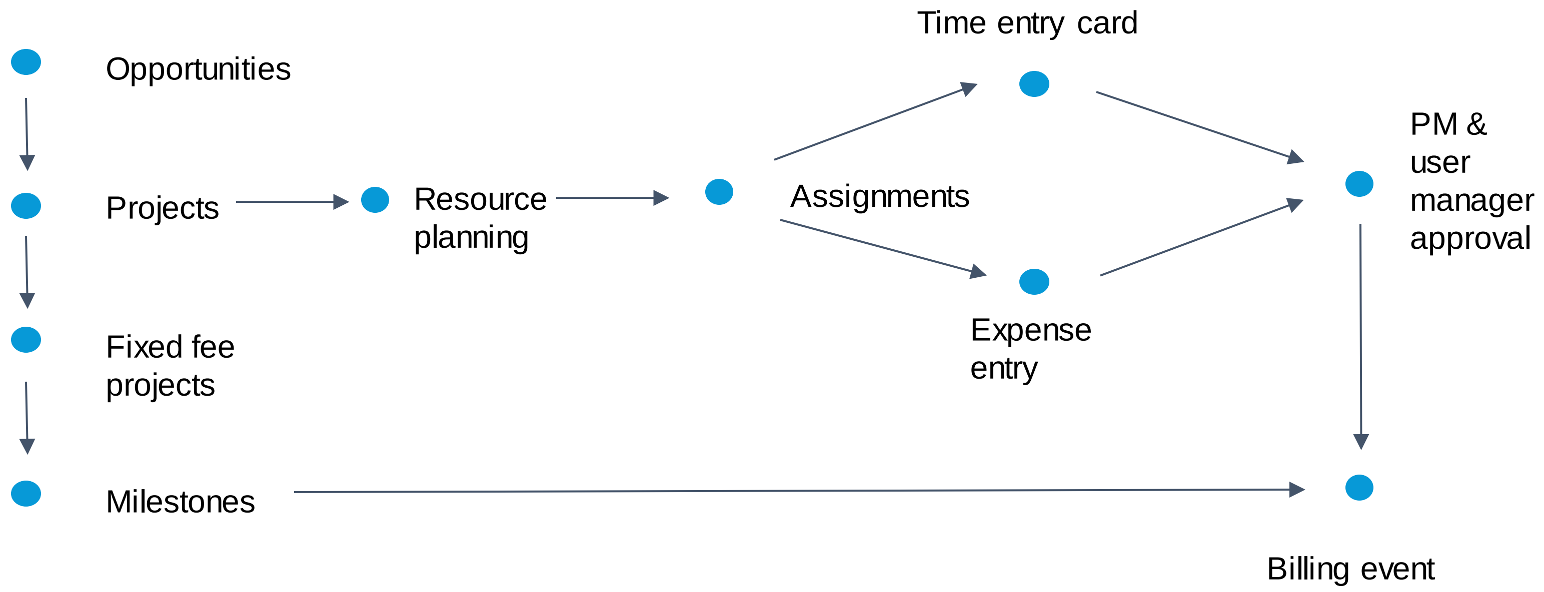
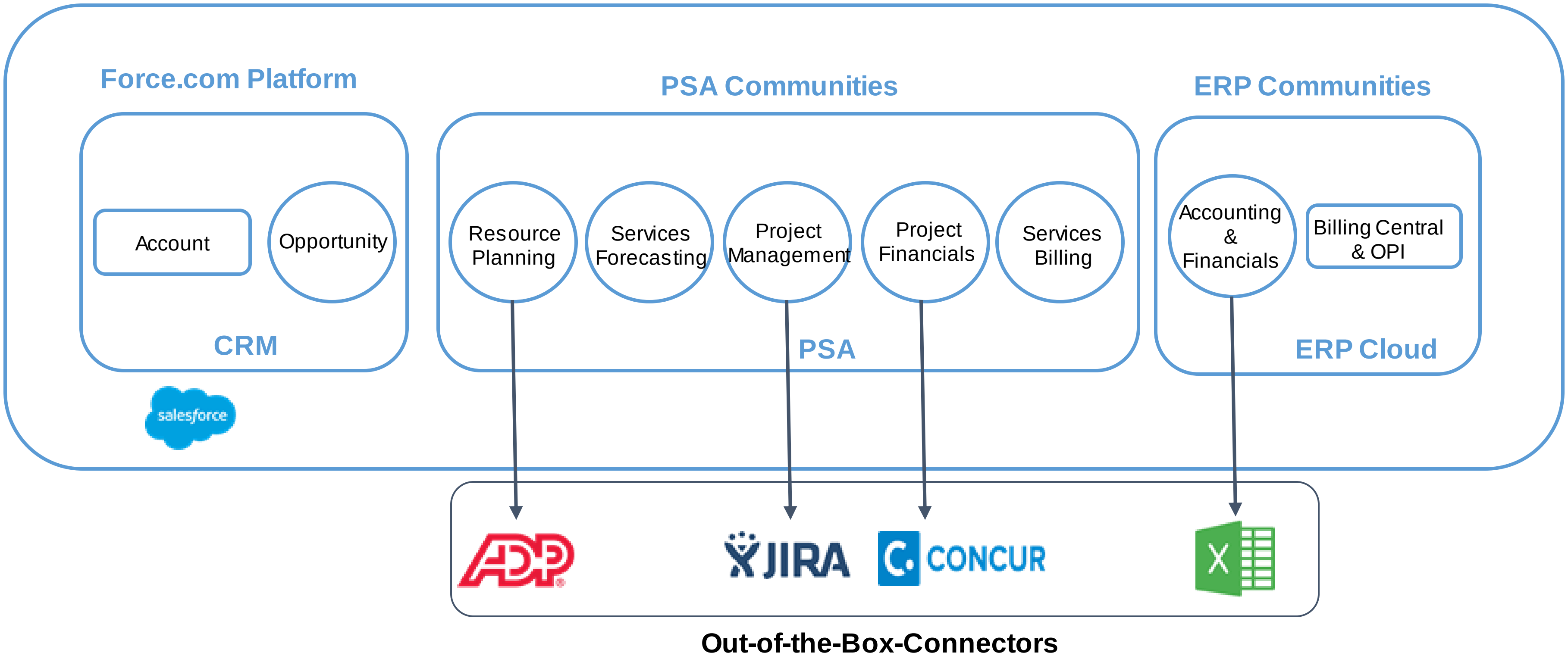
PSA Business Process Summary



PSA Ecosystem



Salesforce Objects

01

Product

List of items to sell or deliver

02

Account

Organization of any type

03

Contact

Person associated with an account

04

Opportunity

Chance to generate revenue

PSA Objects

01
Project
A complex collection of work to be performed

02
Milestone
A fixed target on a project that can be billed

03
Project Task
Specific work that needs to be completed on a project

04
Assignment
Allocation of a resource to a project

05
Timecard
Time charged by a resource to a project

06
Expense Report
A collection of expenses

07
Billing Event
A grouping of billable work on a project

08
Miscellaneous Adjustments
Catch-all business record used to adjust incorrect data

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

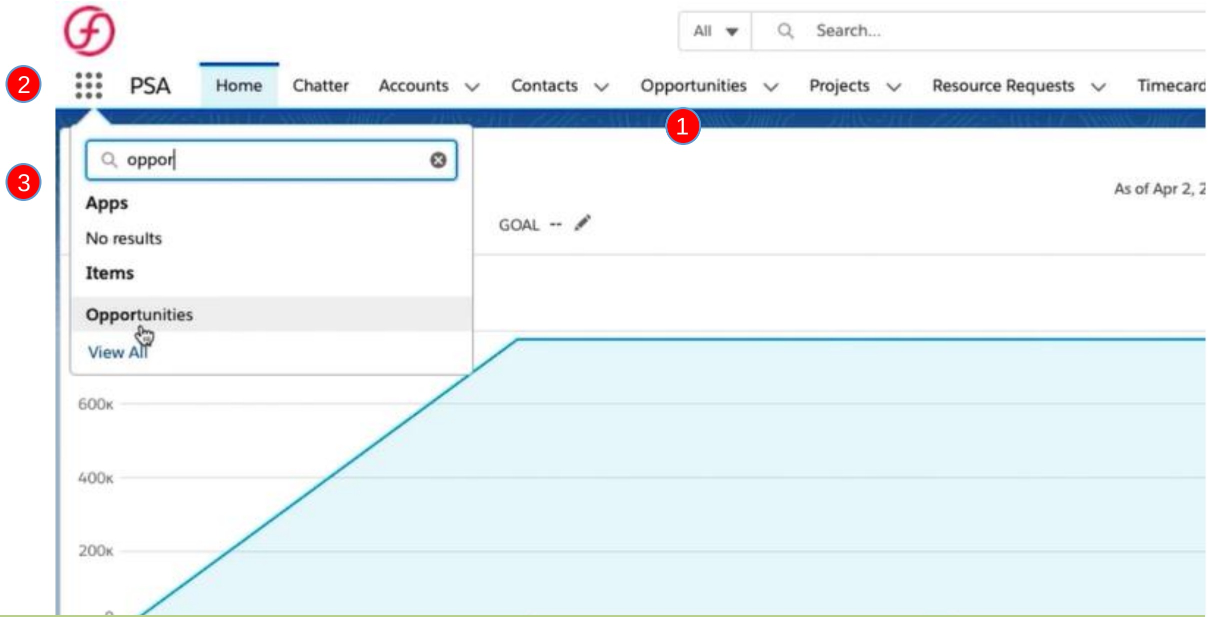
Generates billing events to invoice the customer; manages revenue recognition.

Internal Resource / External Resource

Performs project activities; submits timecards, and expense report.

Create A Project

How to Create a Project from a Template?

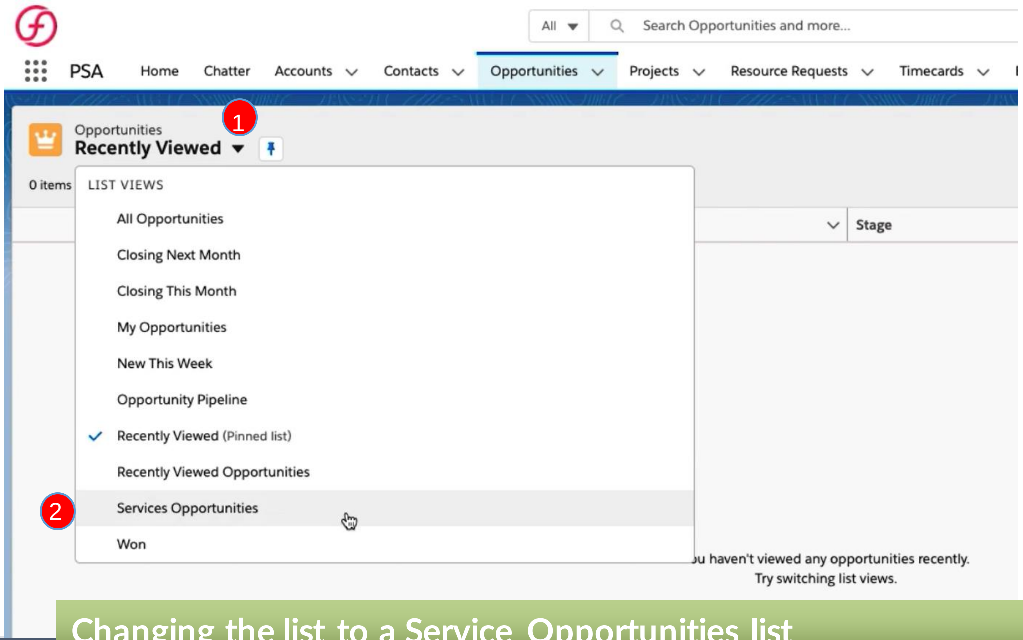


There are two ways you can find the Opportunities list

1. Click on the Opportunities tab on your dashboard.

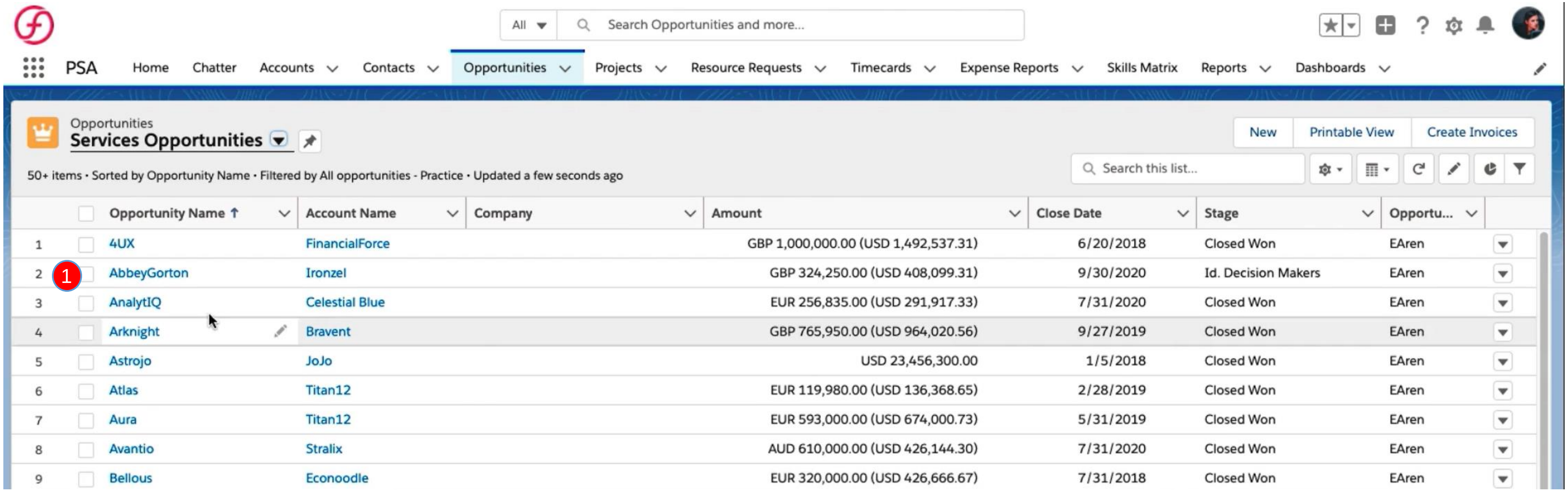
Or

2. Go to your App Launcher.
3. Search for Opportunities.



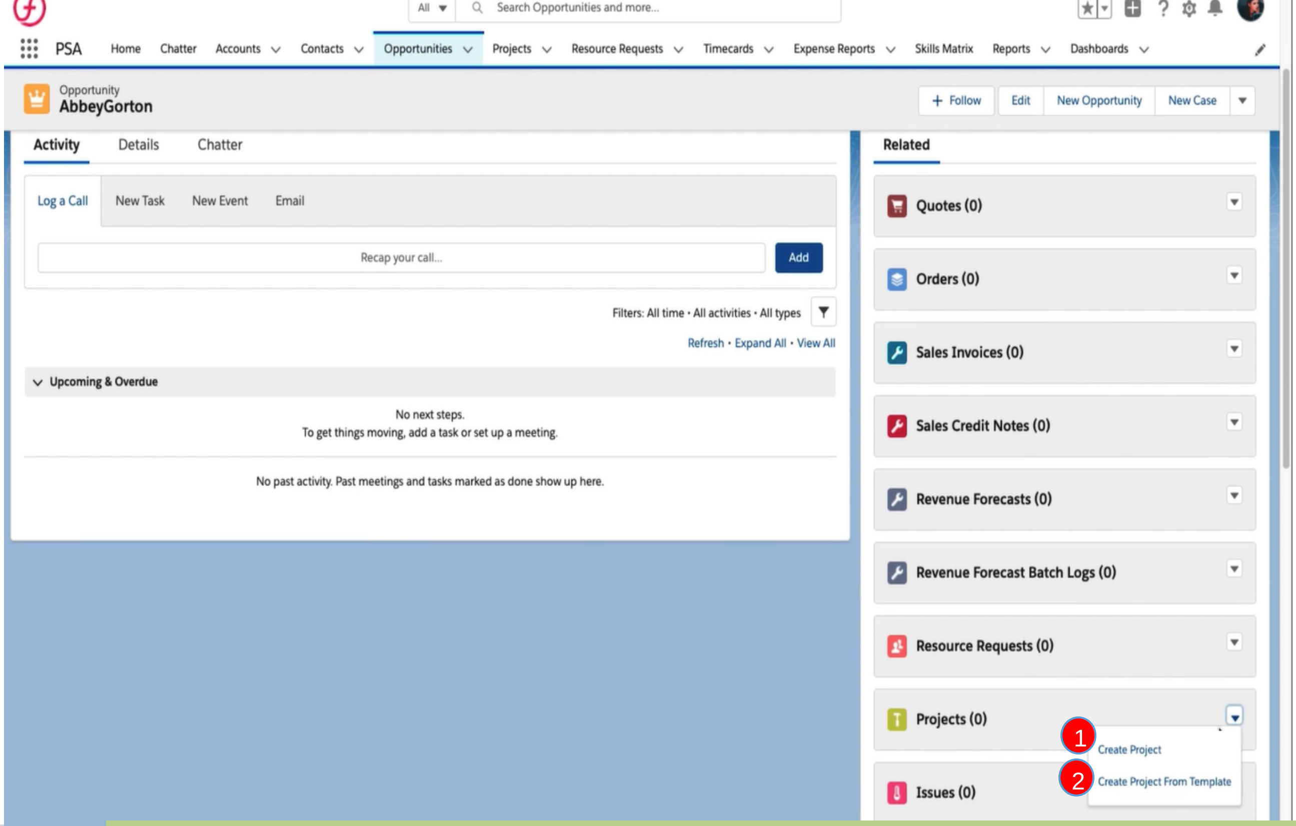
Changing the list to a Service Opportunities list

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



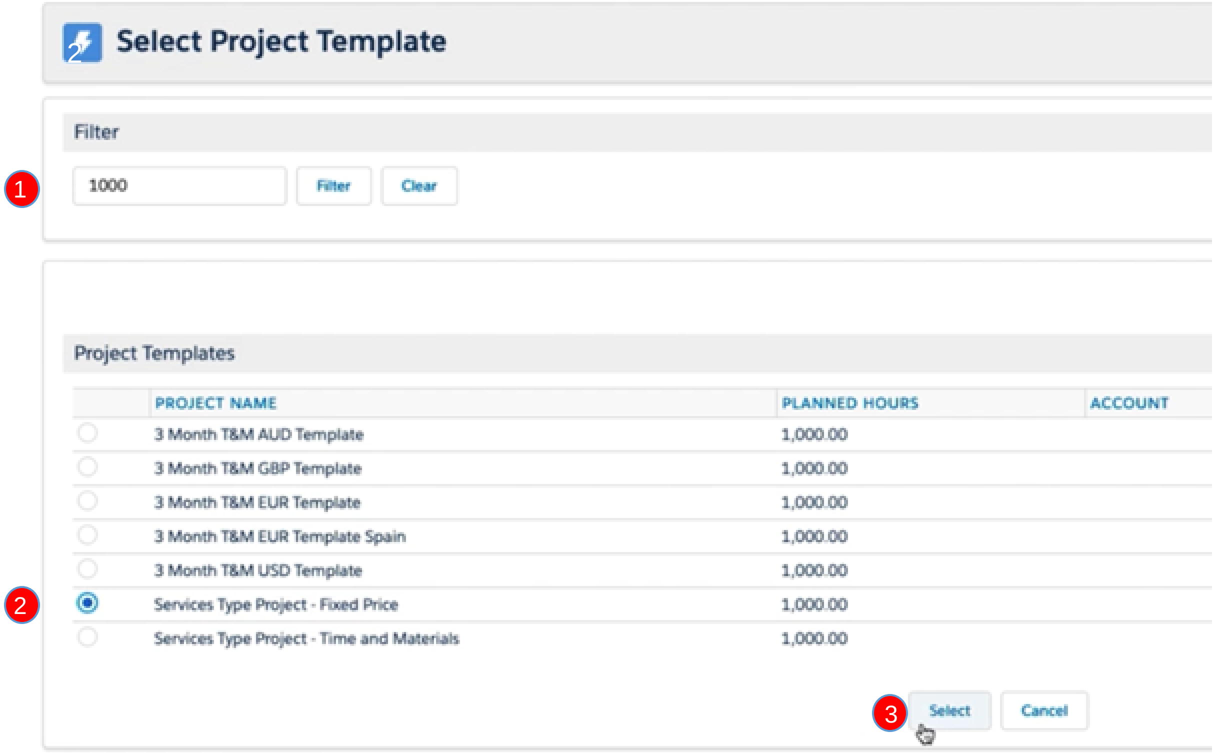
From the Service Opportunities list, select an Opportunity.

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



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 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.

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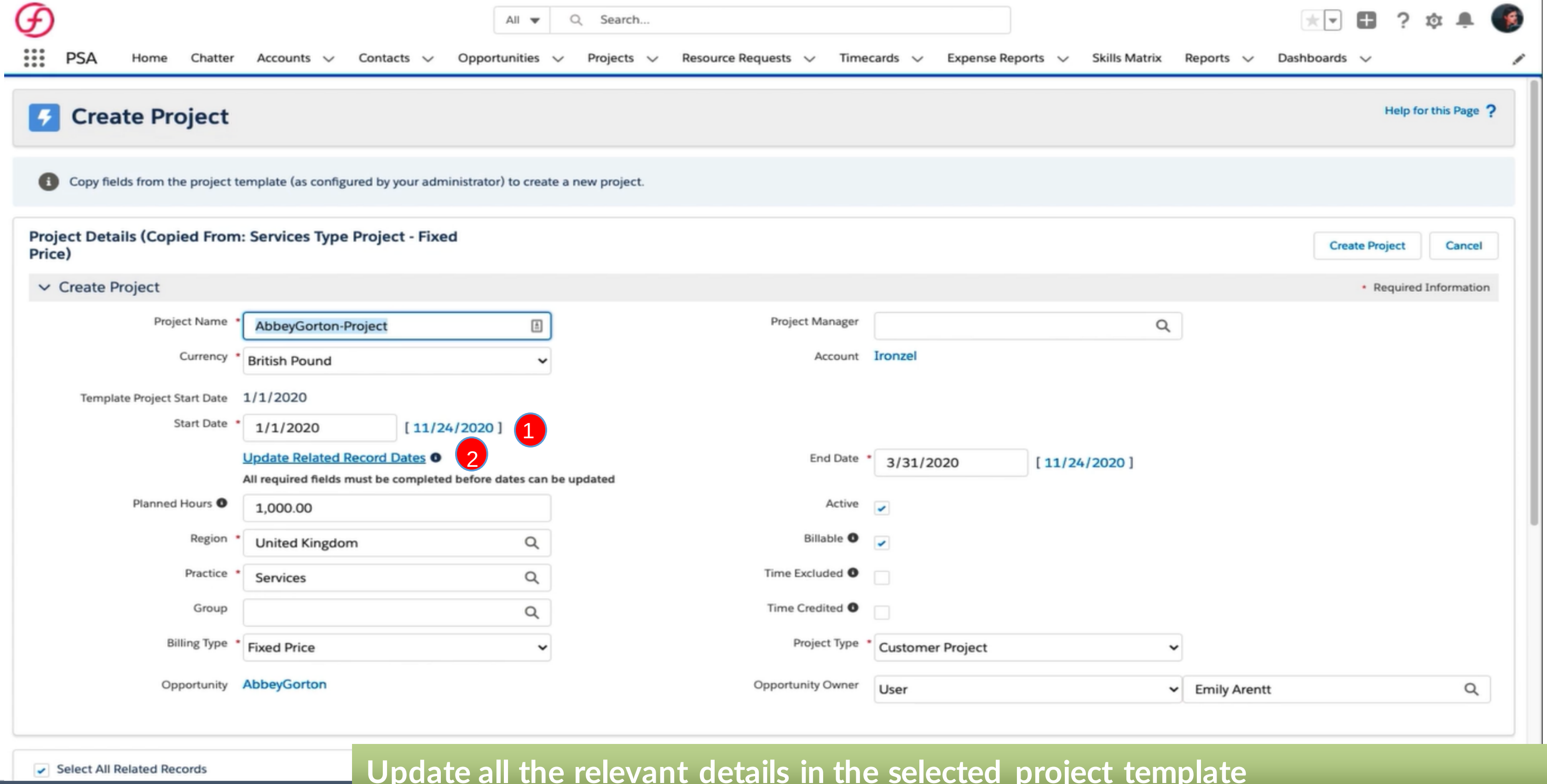

Update all the relevant details in the selected project template

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

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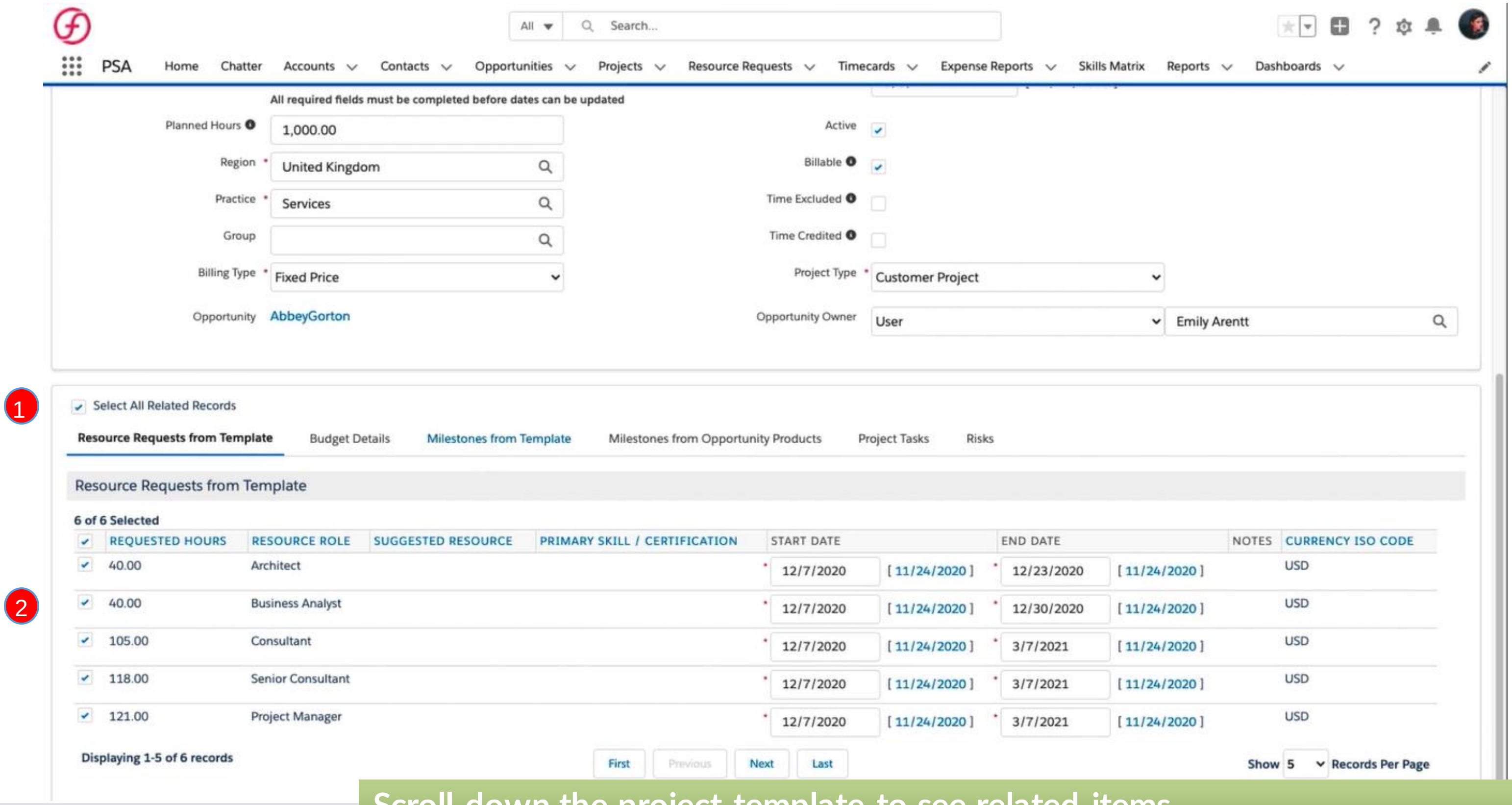
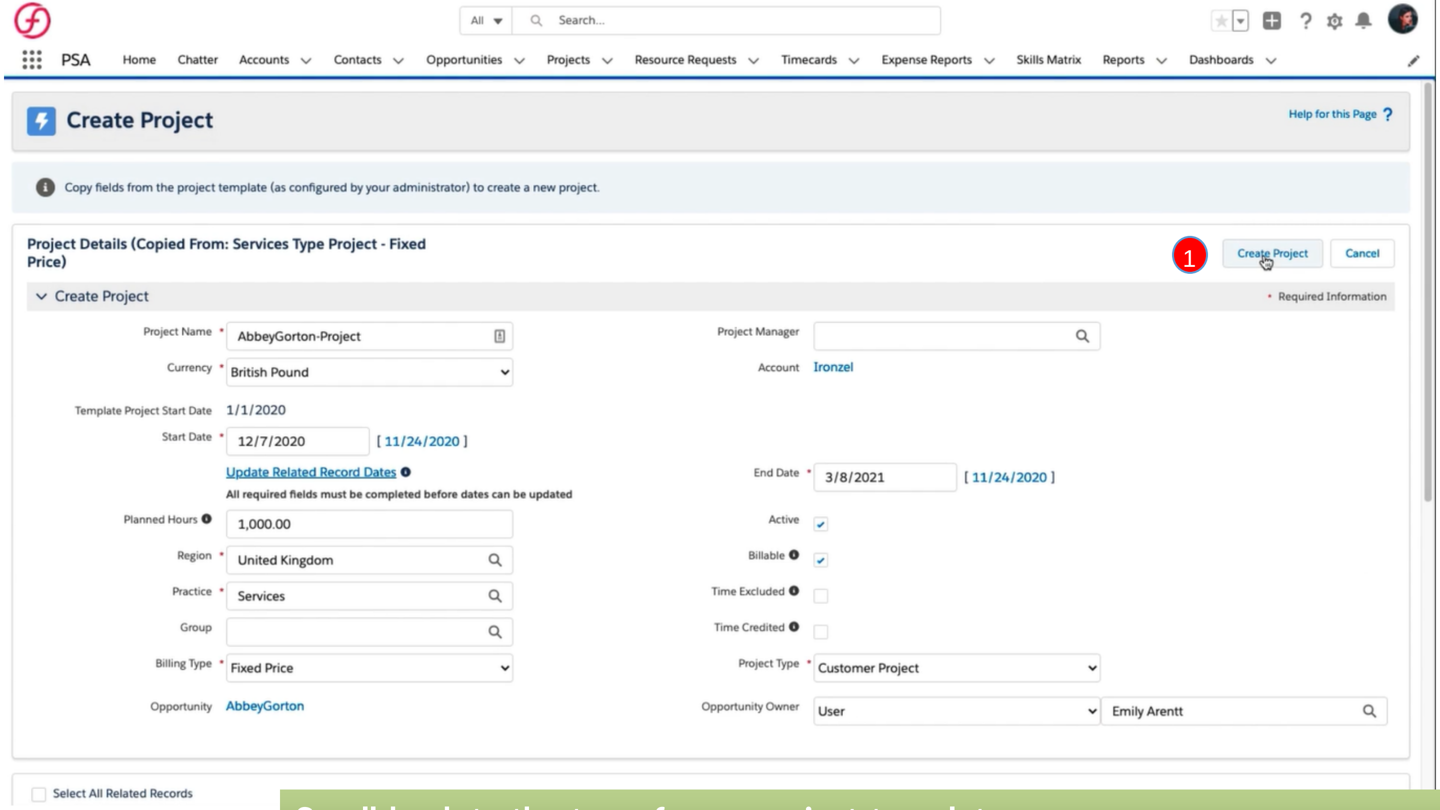


Scroll down the project template to see related items

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.



Scroll back to the top of your project template

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

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