FinancialForce Licensing Guide

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Introduction

FinancialForce offers customer-centric business applications on the leading cloud platform from Salesforce. We accelerate business growth with the only modern ERP suite and the #1 professional services automation (PSA), enabling real-time insights and intelligent decision-making. See your customers in full color with Salesforce and FinancialForce.

In this guide we will discuss how FinancialForce licenses our core **ERP Cloud (Financial Management)** and **Services (Professional Service Automation)** solutions and related products. Our licensing allows customers to purchase simplified and competitively priced bundles or alternatively a la carte licenses.

As a cloud-based SaaS provider, FinancialForce offers all licenses on a subscription basis. Our licensing is based on two different vectors: engines and users. Engines are per-company licenses granting access to functionality. Users are assigned on a named-user basis, meaning each user requires a dedicated user license. “User” means an individual who is authorized by the customer to use a FinancialForce product, for whom the customer has ordered the product, and to whom the customer has supplied a user identification and password. Users may include, for example, the customer’s employees, consultants, contractors and agents, and third parties with which the customer transacts business.

The User license provides users non-perpetual rights (with no buy-out rights) to use the purchased FinancialForce product. As long as the customer is current on its subscription payments and adheres to its legal agreements with FinancialForce, it will have access to the most up-to-date version.

Anyone accessing FinancialForce functionality or intellectual property (or Salesforce functionality or IP through FinancialForce), whether directly or indirectly, must have a paid user subscription.

Technologically, FinancialForce initially provisions the majority of its licenses to a customer's Salesforce Org as a "full" license of a specific family type (e.g. PSA, Accounting, OPI, etc.). This full license is then to be set up with relevant restrictions during the implementation and used in line with the contractual restrictions of the license type being purchased on the Order Form (e.g. PSA T&E, Communities, etc.). The applicable restrictions are specified in the Product Usage Terms for the purchased product at www.financialforce.com/product-terms or as otherwise referenced on the customer's order form. Useful explanations of some of the restrictions can also be found in this Licensing Guide. It is the customer's responsibility to implement the contractual restrictions for each license type. This means that, despite the way the licenses are provisioned, our customers are legally obligated to use the purchased licenses in accordance with the user rights they purchase. For example, a Full PSA User and the T&E PSA User are technically the same user but by contract, the customer cannot use them the same way. A customer cannot assign a User a full license, unless they have purchased a full license for such User.

While FinancialForce products are built on the Salesforce platform, separately-purchased Salesforce licenses are not needed to use most of our products. Our user licenses are provisioned with the appropriate OEM embedded platform license to use FinancialForce functionality, except where noted in this guide or Product Usage Terms for a small subset of specific types of users (e.g. Financial View & Approve User). An example of this exception is when access is required to certain Salesforce-only objects or related Salesforce data.

Note, if the customer is already a Salesforce customer and intends to implement FinancialForce within their existing Salesforce org they must be running Salesforce Enterprise edition or higher in order to be compatible with FinancialForce.

Note that any creation or use of custom objects by the customer must be done using CRM or platform licenses purchased directly from Salesforce. Only FinancialForce and/or our authorized implementation partners may create custom objects using platform licenses provided by FinancialForce, and only so long as the custom object functionality is within the scope of the relevant FinancialForce application description in our Salesforce OEM agreement.

This licensing guide is a high-level overview only, and is subject to change without notice. It is qualified in its entirety by FinancialForce's documentation, legal agreements with the customer and Product Usage Terms.

Embedded Platform Admin User (Admin User)

One Embedded Platform Admin User will be assigned for every 50 users of each FinancialForce product family. Embedded Platform Admin User subscriptions may be used only to configure and administer FinancialForce products in support of the customer's use of those products. An Embedded Platform Admin User subscription may not be used to access, distribute, or use any Salesforce CRM functionality beyond that which overlaps with the **OEM Embedded Platform license**.

OEM Embedded Platform license

Most FinancialForce user licenses include a Salesforce OEM Embedded license, as indicated in the appendix details for each license. The OEM Embedded license is a contractually restricted Salesforce Enterprise Edition Platform license which allows access to a limited set of SalesForce objects as defined in the OEM User License Guide.

Bundled Offers

Below is a summary of our bundled offers which provide customers with the best value for our FinancialForce products. All of these offers include the Premier Success support plan and Sandbox Access. Bundled offers cannot be mixed and matched with the a la carte items, but customers can purchase any of the value add-ons in conjunction with the bundled SKUs. When purchasing value add-ons with bundled offers, customers must also purchase Premier Success and Sandbox Access for the value add-ons.

FinancialForce Suite User

This offer provides the best customer value and includes access to our entire Financial Management and Professional Services Automation portfolio, Sandbox Access, Premier Success support and FinancialForce Full Analytics licenses. Please refer to the a la carte section below for a description of the individual items provided as part of the FinancialForce Suite User bundle.

- ➔ *Full PSA User*
- ➔ *Financials Full User* which also includes access to the functionality from the following *engines*: Accounting engine, Revenue Recognition engine and Billing & Collections engine
- ➔ *Order Procurement & Inventory Full User*
- ➔ *Quoting/Sales Order User*
- ➔ *FinancialForce Analytics Full User*
- ➔ *Sandbox - Access*
- ➔ *Premier Success*

FinancialForce Suite View Only User

This offer provides the best customer value and includes view access to our entire Financial Management and Professional Services Automation portfolio, Sandbox Access, and Premier Success support. Please refer to the a la carte section below for a description of the individual items provided as part of the FinancialForce Suite View Only User bundle.

- ➔ *PSA CRM View Only User*
- ➔ *Financial View, Approval, and CRM User* (Limited use, does not include approve billing and invoice data) which also includes access to the functionality from the following *engines*: Accounting engine, Revenue Recognition engine and Billing & Collections engine
- ➔ *Order Procurement & Inventory View and Approval User*
- ➔ *Sandbox - Access*
- ➔ *Premier Success*

ERP Cloud User - Plus

This offer provides excellent value for ERP customers with full capabilities for Financial Management, Procurement, FinancialForce Full Analytics, Sandbox Access and Premier Success support. Please refer to the a la carte section below for a description of the individual items provided as part of the ERP Cloud User - Plus bundle.

- *Financials Full User* which also includes access to the functionality from the following *engines*: Accounting engine, Revenue Recognition engine and Billing & Collections engine
- *Procurement User*
- *FinancialForce Analytics Full User*
- *Sandbox - Access*
- *Premier Success*

PSA Billing & Revenue User - Plus

This offer includes our Premium PSA User license bundled in with Billing and Collection and Revenue Recognition capabilities, our Sandbox Access and Premier Success support, and FinancialForce Analytics Full licenses. Please refer to the a la carte section below for a description of the individual items provided as part of the Premium PSA User - Plus bundle.

- *Premium PSA User,* including:
  - *Billing and Collections engine*
  - *Revenue Recognition engine*
- *FinancialForce Analytics Full User*
- *Sandbox - Access*
- *Premier Success*

Full PSA User - Plus

This offer includes our Full PSA User license bundled in with our Sandbox Access and Premier Success support. Please refer to the a la carte section below for a description of the individual items provided as part of the Full PSA User - Plus bundle.

- *Full PSA User*
- *Sandbox - Access*
- *Premier Success*

PSA T&E User - Plus

This offer includes our PSA T&E User license bundled in with our Sandbox Access and Premier Success support. Please refer to the a la carte section below for a description of the individual items provided as part of the PSA T&E User - Plus bundle.

- *PSA T&E User*
- *Sandbox - Access*
- *Premier Success*

PSA CRM View Only - Plus

This offer includes our PSA CRM View Only User license bundled in with our Sandbox Access and Premier Success support. Please refer to the a la carte section below for a description of the individual items provided as part of the PSA CRM View Only User - Plus bundle. An Enterprise level (or higher) Sales or Service Cloud license is required as a prerequisite.

- ➔ *PSA CRM View Only User*
- ➔ *Sandbox - Access*
- ➔ *Premier Success*

For a detailed view of the use rights associated with the Bundled Offers, please refer to **Appendix A**.

Velocity SRP Bundled Offers

Below is a summary of our Velocity SRP (Services Resource Planning) bundled offers which provide customers seeking best practices the best value for our FinancialForce products. All of these offers include Training Access and Sandbox Access. Premier Success is not included but can be added separately. These bundled offers cannot be mixed and matched with the a la carte items, but customers can purchase any of the value add-ons in conjunction with the bundled SKUs. When purchasing value add-ons with bundled offers, customers must also purchase Premier Success (if they are a premier customer) and Sandbox Access for the value add-ons.

Velocity SRP Full User

This offer provides the best customer value for SRP customers. Please refer to the a la carte section below for a description of the individual items provided as part of the Velocity SRP Full User bundle.

- ➔ *Full PSA User*
- ➔ *Financials Full User* which also includes access to the functionality from the following *engines*: Accounting engine & Revenue Recognition engine (Please note that Billing Central is not included)
- ➔ *Procurement User*
- ➔ *FinancialForce Analytics Full User*
- ➔ *Training - Access*
- ➔ *Sandbox - Access*

Velocity SRP View User

This offer provides the best customer value for SRP customers and includes view access to Accounting, Revenue Recognition, Procurement, Professional Services Automation, Sandbox Access, and Training Access. Please refer to the a la carte section below for a description of the individual items provided as part of the Velocity SRP View User bundle.

➔ *PSA CRM View Only User*
➔ *Financial View, Approval, and CRM User* (Limited use, does not include approve billing and invoice data) which also includes access to the functionality from the following *engines*: Accounting engine, & Revenue Recognition engine (limited to Revenue Management for PSA)
➔ *OPI View & Approve Only User - Bundle*
➔ *Training - Access*
➔ *Sandbox - Access*

Velocity SRP T&E User

This offer includes our Velocity SRP T&E User license bundled in with our Sandbox Access and Training Access. Please refer to the a la carte section below for a description of the individual items provided as part of the Velocity SRP T&E User bundle.

➔ *PSA T&E User*
➔ *Training - Access*
➔ *Sandbox - Access*

For a detailed view of the use rights associated with the Bundled Offers, please refer to **Appendix B**.

A la carte Offers

These offers are all sold a la carte, i.e. they may be purchased individually. They may not be purchased if the customer has also purchased a Bundled Offer that includes the respective a la carte offer. Below you will find details on our Financial Management and Professional Services Automation solutions.

ERP Cloud (Financial Management)

FinancialForce Financial Management (FM) gives you a flexible general ledger, automated billing processes, and brilliant intelligence so you can streamline, simplify, and automate your financial operations on the Salesforce Platform.

Our extensive FM solution includes Financial Accounting, Planning, Revenue Management, Billing, and

Order, Procurement, & Inventory (OPI). There is a five-user minimum for new FM purchases (excluding full OPI) and a three-user minimum for add-on purchases. These minimums can only be achieved by purchasing a Financials Full User. Please note that the only exception is when including full OPI, which has a minimum of 10 OPI users. To dive into the licensing for Financial Management, we will break into three sections:

- Financial Accounting, Revenue Recognition and Billing & Collections
- Planning
- Order, Procurement & Inventory

Financial Accounting, Revenue Recognition and Billing & Collections

This portion of FM utilizes engines and users for the licensing. Engines provide customers with access to different parts of the FM portfolio. At least one engine is required, but multiple engines can be purchased to provide customers with their desired functionality. In addition, we have two different user types. Below we provide descriptions of all of these engines and user types.

There are three different engines:

- **Accounting engine:** This engine provides access to full General Ledger (GL), Accounts Receivables (AR) & Collections, Accounts Payable, Cash Management and Fixed Assets. Pricing for this engine is based on the number of employees and number of companies. A company is a discrete, self-balancing accounting unit within your organization.
- **Revenue Management:** Pricing for this engine is based on market segment tier. This module connects to the various revenue sources and automates revenue recognition rules and reporting (ASC606/IFRS15) across all revenue streams.
- **Billing & Collections Engine:** Pricing for this engine is based on the higher of market segment tier or number of annual invoices. This is required for consolidating PSA Billing and Subscription and Usage Billing capability.

After you select the engines to gain access to the functionality, you will need to license your users. FM has two different named user types:

- **Financials Full User** provides full rights to read, create, delete, edit, and approve within the FM functionality covered by the engines licensed. This product requires at least one Embedded Platform Admin User. The Financials Full User license includes a Salesforce OEM Embedded Platform license, which provides access to the objects within that license, as listed **here**. Note the OEM Embedded Platform license does not include access to the Opportunities object. If access to the Opportunities object is required for the Financials Full User and the user does not have a full Salesforce Sales Cloud or Service Cloud license, then the customer should also purchase a

Restricted Sales Cloud Add-On User for this Financials Full User.

- The **Restricted Sales Cloud Add-on User** license may be used to access all of the standard Salesforce OEM Embedded Platform license functionality, plus the Opportunities object. This license does not allow the use of any other Salesforce Sales Cloud functionality beyond the standard OEM Embedded Platform license (such as, for example, the Campaigns, Leads, Cases, Solutions, or Forecasts object). Users may only use this license as needed to use the FinancialForce FM products, and users may only access this license if they are accountants or their full-time job is acting in an accounting function. Note that this Add-on User can only be added onto the Financials Full User.

- **Financial View, Approval, and CRM User** allows Salesforce Sales Cloud and/or Service Cloud users to view and approve billing and invoices data in FinancialForce. This type of user may access reports and dashboards that contain only invoice and billing data. No other financial reporting or dashboard access is allowed for this user. Each Financial View, Approval and CRM User must have an active Enterprise level (or higher) Salesforce Sales Cloud or Service Cloud subscription. The Financials View, Approval, and CRM User User license includes a Salesforce OEM Embedded Platform license, which provides access to the objects within that license, as listed **here**. Note the OEM Embedded Platform license does not include access to the Opportunities object.

FinancialForce Planning

FinancialForce Planning enables enterprise-scale planning, forecasting, and reporting that accelerates decision-making and company growth, all on one platform. The licensing model for FinancialForce Planning utilizes engines and users. Below are descriptions of these engines and user types. Note, the Accounting Engine and one Full Financials User on the customer account are prerequisites for the Planning Engine.

FinancialForce Planning Engine

There are two engine tiers and pricing is based on customer employee count, number of companies, and functionality. A company is a discrete, self-balancing accounting unit within your organization. Headcount Planning by Resource is reserved for the second engine tier.

FinancialForce Planning Users

After selecting the engine to gain access to the functionality, you will need to license your users. Planning has two different named user types:

- **Full Planning User** provides full rights to FinancialForce Planning. The Full Planning Users can act as business users, financial model builders, and as administrators, depending on the customer's preferences. Full Planning Users can enter and save data on planning sheets (budgets, forecasts, or other models), and create, view, and share reports.

The Full Planning User is available standalone or as an add-on to an existing Financials Full user.
- **Full Planning User** is for users that do not have a Financials Full license. This user would also need an FM Analytics View User License or higher for use rights to consume FFA data and consume pre-built reports. This includes a Salesforce OEM Embedded Platform license, which provides access to the objects within that license, as listed **here**.
- **Full Planning Add-on for Financials Full User** (prerequisite of a Financials Full license). This user must also have a Full Financial Reporting or other Analytics license assigned to utilize the reporting functionality.

- **Planning Contributor Users** can enter and save data on planning sheets (budgets, forecasts or other models). Contributor Users can also submit and approve budgets.
  - **Contributor Planning Add-on for Financials Full User** (prerequisite of a Full Financials license).

Order, Procurement & Inventory

OPI provides key capabilities for Procurement (Spend), Order, and Inventory Management, helping you see, simplify, and optimize the entire order-to-fulfillment process for both goods and services. With FinancialForce OPI understands your inventory, what you can sell, what's on its way, and how to make it all profitable. Procurement capabilities provide visibility and control over the entire procure-to-pay process for both indirect and direct spend.

OPI is licensed only with named users; there are no required engines. We have four user types for Order, Procurement & Inventory and one user for Quoting. The user types for OPI:

- **Order Procurement & Inventory Full User** provides full read, edit, and approval access to Order Procurement & Inventory functionality. This includes sales order fulfillment, inventory and procurement, making changes to available inventory, account view of OPI data, invoicing, Chatter, and order approvals. This product requires at least one Embedded Platform Admin User. The Order Procurement & Inventory Full User license includes a Salesforce OEM Embedded Platform license, which provides access to the objects within that license, as listed **here**. Note the OEM Embedded Platform license does not include access to the Opportunity object.
- **Procurement User** provides full read, edit, and approval access to purchase approval, purchase request/requisition, & purchase order fulfillment. This product requires at least one Embedded Platform Admin User. Customers must have at least one Order Procurement & Inventory Full User to

utilize the Order Procurement & Inventory View & Approval User. The Procurement User license includes a Salesforce OEM Embedded Platform license, which provides access to the objects within that license, as listed **here**. Note the OEM Embedded Platform license does not include access to the Opportunity object.

- **Order Procurement & Inventory View & Approval User** provides users outside of the purchasing function access to view and approve purchase requests and view inventory. Customers must have at least one Order Procurement & Inventory Full User to utilize the Order Procurement & Inventory View & Approval User. The Order Procurement & Inventory View & Approval User license includes a Salesforce OEM Embedded Platform license, which provides access to the objects within that license, as listed **here**. Note the OEM Embedded Platform license does not include access to the Opportunity object.
- **Self-Service Requisition User** may be used only to raise purchasing requests within the OPI functionality. Use of approval or reporting functionality is not allowed with this user type. Customers must have at least one Order Procurement & Inventory Full User to utilize the Self Service Requisition User. The Self-Service Requisition User license includes a Salesforce OEM Embedded Platform license, which provides access to the objects within that license, as listed **here**. Note the OEM Embedded Platform license does not include access to the Opportunity object.
- **Quoting/Sales Order User** may be used only to access quoting and the user must have an active Enterprise level (or higher) Salesforce Sales Cloud or Service Cloud subscription. Customers must have at least one Order Procurement & Inventory Full User to utilize the Quoting/Sales Order. The Quoting/Sales Order User license includes a Salesforce OEM Embedded Platform license, which provides access to the objects within that license, as listed **here**. Note the OEM Embedded Platform license does not include access to the Opportunity object.

For a detailed view of the use rights associated with Financial Management, please refer to **Appendix C**.

Professional Services Automation

FinancialForce Professional Services Automation (PSA) empowers services organizations to run their businesses with greater predictability. Gain unprecedented visibility into your business across sales, services delivery, and finance to improve project margins and resource utilization rates, keep clients happy, and drive sales and service collaboration – all on the Salesforce Platform.

There is a 50-user minimum for new PSA deals and a five-user minimum for add-on opportunities. These minimums can be achieved by mixing and matching any PSA user types, as defined below. Each PSA edition has the same four user types:

- **Premium PSA User** provides access to a Full PSA User and a restricted Financials Full User. Please refer to the below Full PSA User terms. The use of Financials Full User functionality is limited to the following. (1) Customer may use AR/Collections functionality, solely to create, view, edit, display, post and send invoices and credit notes; and (2) Customer may use Revenue Recognition functionality. This product does not permit the use of any other Financials functionality (such as, for example, General Ledger, Fixed Assets or Billing Central). This product requires the purchase of a Billing & Collections Engine to use the AR/Collections functionality, and/or the Revenue Recognition Engine to use the Revenue Recognition functionality. These engines are not included with this product and must be purchased separately. The Premium PSA User license includes a Salesforce OEM Embedded Platform license, which provides access to the objects within that license, as listed **here**. Note the OEM Embedded Platform license does not include access to the Opportunity object.

- **Full PSA User** provides full read, create, delete, edit, and approval access to PSA. The Full PSA User requires at least one Embedded Platform Admin User. The Full PSA User license includes a Salesforce OEM Embedded Platform license, which provides access to the objects within that license, as listed **here**. Note the OEM Embedded Platform license does not include access to the Opportunity object. Note that the Full PSA User includes a PSA Resource license. The Full PSA User includes but is not limited to functionality such as:
    - Creation of projects
    - Project management
    - Resource management
    - Capacity planning
    - Time and expense management
    - Approvals
    - Project accounting and budget
    - Delivered revenue forecasting
    - Billing events
    - Reporting

- **PSA T&E User** allows the user to access only the Timecards and Expense custom objects of the FinancialForce PSA product, and other screens as needed to select time and expense data to enter it into the FinancialForce PSA product, solely for the purpose of entering and updating that User's time and expenses for professional services and updating that User's assigned tasks, skills and certifications. The PSA T&E User license includes a Salesforce OEM Embedded Platform license, which provides access to the objects within that license, as listed **here**. Note the OEM Embedded Platform license does not include access to the Opportunity object.

- **PSA CRM View Only User** is permitted full access to the PSA Chatter features—and read-only access to all other features and functions of PSA. A PSA CRM View Only User may not enter or modify data in PSA except to post or comment in Chatter. No PSA resource requests are included in the PSA CRM View Only User. Each user must also have an active Enterprise level (or higher) Salesforce Sales Cloud or Service Cloud subscription. The PSA CRM View Only User license includes a Salesforce OEM Embedded Platform license, which provides access to the objects within that license, as listed **here**. Note the OEM Embedded Platform license does not include access to the Opportunity object.

- **PSA Resource** license only allows for the creation of a Resource record in PSA and does not include a user login with the license. A PSA Resource is any person or device whose identifying information (for example, name or employee number for a person) is stored in the PSA product as a resource. Note that the Full PSA User and the PSA T&E User each include a PSA Resource license. If a customer wants to be able to track people in PSA, even if the people are not entering T&E, a PSA Resource license must be obtained for each person tracked. For example, if a project manager is entering time for a development resource that is delivering billable time but is not part of the professional services organization and has no access to PSA, that development resource requires a PSA Resource license.

For a detailed view of the use rights associated with PSA please refer to **Appendix D**.

Value Add-ons

Services CPQ

Services CPQ provides key capabilities to streamline the services estimating and quoting process for delivery of work by professional services teams. With FinancialForce PSA, Services CPQ users initiate an estimating process directly from the opportunity, quickly and accurately build up an estimate, manage discounts, conduct margin analysis across different scenarios, initiate an approval process, and if required feed the final estimate directly into their CPQ process. In addition, Services CPQ enables the user to create resource demand directly at the opportunity to support resource forecasting.

Services CPQ is licensed with user add-ons. A PSA license is required for any add-on user of Services CPQ. There is a minimum of 5 Full Services CPQ users required on a net new or add-on opportunity. There are two basic Services CPQ Add-on User types:

- **Full Services CPQ Add-on for Full PSA User** provides rights to Services CPQ capabilities, as well as full create, read, edit, and approval access to Services CPQ functionality. This includes estimate initiation, configuration, discount management, scenario management, approvals process management, quote editing, resource request, chatter, and connection to other CPQ services. This product requires the user to have a Full PSA license. Each Full Services CPQ Add-on for Full PSA User must also have an active Enterprise level (or higher) Salesforce Sales Cloud subscription.

- **View and Approve Services CPQ Add-on** licenses provide users access to view estimates related to projects to which they have access, and the ability to approve estimates. Customers must have at least one Full Services CPQ Add-on User to utilize the View and Approve Services CPQ Add-on User. There are three different add-on licenses which may be added depending on the underlying PSA license the user has assigned. The View and Approve Services CPQ Add-on user will be limited by the scope of the underlying license to which it is added.
    - **View and Approve Services CPQ Add-on for Full PSA User** (pre-requisite of a Full PSA User)
    - **View and Approve Services CPQ Add-on for PSA CRM View Only User** (pre-requisite of a PSA CRM View Only User)
    - **View and Approve Services CPQ Add-on for PSA T&E User** (pre-requisite of a PSA T&E User)

For a detailed view of the use rights associated with Services CPQ please refer to **Appendix E**.

Conga Engine for ERP Cloud (Financial Management)

FinancialForce is an authorized reseller of the Conga Composer, Batch (formerly Conductor), and Trigger (formerly Workflow) products, which are provided by AppExtremes, LLC (DBA “Conga”). The Conga integration enables customers to generate richly formatted and branded reports, invoices, credit notes, checks, payable remittances, and statements from FinancialForce FM.

This license is restricted to FinancialForce’s FM products ONLY. Specifically, the restriction applies to the following products:

- Accounting (FFA)
- Revenue Management
- Billing Central (FFBC)
- Reporting (FFR)
- Order Procurement & Inventory (OPI)
- Advanced Quoting (OPIQT)
- Service Contracts (OPISC)
- Fixed Assets (FAM)
- Bank Formats
- Lockbox
- VAT Reporting

The Conga Engine for Financial Management is licensed once per customer.

FinancialForce Integrations

Integration Hub Connector for Concur - Production and Sandbox

The FinancialForce Integration Hub Connector will streamline the process of building robust connectors to the key third party applications using public APIs and to rapidly deliver seamless integrations to our customers. The Connector fee is applied per customer per instance of connector, and we have both a Production instance and a Sandbox instance. Use of these connectors require a minimum of one Full PSA license. In addition, the PSA Resource license (or other PSA license type that includes a PSA Resource license) is required for each resource record accessed by the applicable Integration Hub Product. Currently, customers have the option to license the integration between FinancialForce and SAP Concur, a leading travel and expense management solution.

PSA Direct for Jira

FinancialForce offers its own point-to-point integration between PSA and Jira. PSA Direct for Jira makes the process of delivering precise integrations to our customers pain-free by integrating Task Management for PSA and Jira.

Pricing for PSA Direct for Jira is based on the number of integrating Jira users and is applied on a per customer per integration basis. Use of this integration requires a minimum of one Full PSA User license. In addition, a minimum of a PSA Resource License is required for each resource record accessed by PSA Direct for Jira.

FF Integration User

The FF Integration User is a restricted FinancialForce Suite User being used solely for the set-up and administration of 3rd party integrations, e.g. the Plaid bank statement integration. There is no license prerequisite for this user, but certain integrations in the product will require this user.

Financial Reporting

Financial Reporting functionality may be added at no charge for all Financials Full Users. Financial Reporting includes Financial Report Builder and may be used only to generate, view, and/or modify the following types of reports: trial balance, cash flow statements direct / indirect method, balance sheet, income statement, consolidated statement, variance report, actuals versus budget comparison, and basic profitability analysis. Financial Reporting may be used only with FinancialForce Accounting functionality. (It may *not* be used with FinancialForce Billing Central, Revenue Recognition, PSA, OPI, or HCM functionality).

For a detailed view of the use rights associated with Financial Reporting, please refer to **Appendix F**.

PS Cloud Core Analytics

PS Cloud Core Analytics is a free subset of PSA Analytics which includes a limited number of out of the box dashboards to be embedded into workspaces or record pages.

PS Cloud Core Analytics users cannot create dashboards, cannot modify dashboards, and cannot view custom dashboards. These users do not have access to Analytics Studio and cannot export to Excel. Cannot refresh data more than once every 24 hours unless an Advanced Analytics user is also purchased, in which case data can be refreshed up to every hour.

PS Cloud Core Analytics may be added at no charge for all PSA User types (excluding PSA Resource License).

Advanced Analytics

FinancialForce Advanced Analytics (also known as Growth Analytics) delivers real-time visibility into key KPIs used by services – Billings, Backlog, Utilization & Capacity – for improved forecasting and actionable insight as well as enhanced, role-based dashboards and financial reporting.

Advanced/Growth functionality has three license options: an FM Analytics view user, a PSA Analytics view user, and an FF Analytics full user. There is a minimum of 5 Advanced Analytics users required for net new purchases and a minimum of 3 Advanced Analytics users required for add-on purchases.

- **FM Analytics View User**: Can consume any prebuilt FM based analytics dashboard. Customers must have FM installed, i.e. have at least one user license permitted to use FM for the FM View Analytics User.
- **PSA Analytics View User**: Can consume any prebuilt PSA based analytics dashboard. Customers must have PSA installed but there is no PSA user license prerequisite for the PSA View Analytics User.
- **FinancialForce Analytics Full User**: Can consume any prebuilt PSA/FM analytics dashboards, but can also modify these and create new dashboards based on PSA/FM data. Custom fields specific to PSA/FM can also be added to datasets and leveraged in prebuilt dashboards. To use this, Customer must purchase and assign a license containing a Financials Full User **AND/OR** a Full PSA User. Analytics functionality available will be dependent on the type of Full User (Finance or PSA) is licensed.

FinancialForce also offers a FinancialForce Analytics Plus User that will allow customers to connect their analytics to external data sources and Discovery and Prediction builders, in addition to custom objects. Note that any creation or use of custom objects by the customer must be done using CRM or platform licenses purchased directly from Salesforce. Only FinancialForce and/or our authorized implementation partners may create custom objects using platform licenses provided by FinancialForce, and only so long as the custom object functionality is within the scope of the relevant FinancialForce application description in our Salesforce OEM agreement. Salesforce data or objects such as “opportunity” do not count as external data.

- **FinancialForce Plus Analytics Upgrade - 10 User Starter Pack**: This is required for any customer wanting access to Plus Analytics. There is also a prerequisite of 10 FinancialForce Full Analytics Users.
- **FinancialForce Plus Analytics Upgrade User**: After the starter pack is purchased you may add additional Plus users utilizing this SKU. There is still a 1:1 prerequisite of one FinancialForce Full Analytics Users for every FinancialForce Plus Analytics Upgrade User.

For a detailed view of the use rights associated with Plus Analytics, please refer to **Appendix G**.

Community Licenses

FinancialForce Community Cloud allows companies to create branded sites that connect customers (for ERP Cloud / Financial Management and PSA) and partners (for PSA) with experts, information, and each other. This portal combines the real-time collaboration of Chatter with the ability to share any file, data, or record anywhere and on any mobile device. Community Cloud allows you to streamline key business processes and extend them across offices and departments, and outward to customers and partners, so everyone in your business ecosystem can service customers more effectively, close deals faster, and get work done in real time. Please note that in order to utilize Community licenses with FinancialForce products, the customer must subscribe to the related user-based FinancialForce product (such as FM, OPI and PSA).

FinancialForce sells two main types of community experiences: Customer Community and Partner Community. Each Community type will have its own licenses and access, as well as different FinancialForce product and platform functionality. FM Communities can only be added using the Customer Community but PSA Communities are available in both the Customer and Partner Community (please see **Appendix H** for the differences).

A community license allows external users to access a community, however they do not have access to the internal org. Users who already have a license for the internal organization may access Communities to which they have the appropriate use rights without an additional Communities license, but they must be set up by the administrator.

Partner Community Licenses

Within the Partner Community we have one product - PSA Community. This may be licensed by members (named users) or logins. This product may be used by personnel of companies with which the Customer transacts business, including, for example, customers, subcontractors, alliance partners and vendors of Customer. This product may not be used by employees or other personnel of Customer.

- **PSA Communities:** PSA Communities is a set of components enabling Salesforce Community Managers to grant designated community users secure access to PSA features Time & Expense, Skills, Project Gantt, and other Project features. Please see **Appendix H** for the details. Users of the PSA Community product may only access the following Salesforce objects and functionality: (i) Chatter, Files, People, Topics, and Profiles; (ii) Salesforce1; (iii) Force.com Sites; (iv) Products and Price Books (read-only access); (v) APIs; (vi) roles-based sharing; and (vii) workflow approvals (submit-only). Access to any other Salesforce functionality or technology as part of the PSA Community Members product is prohibited.

Customer Community Licenses

Within the Customer Community we have two products - FM Community and PSA Community. This Community may be licensed by members (named users) or logins, to access FM, PSA or both experiences. This product may be used by personnel of companies with which the Customer transacts business, including, for example, customers, subcontractors, alliance partners and vendors of Customer. This product may not be used by employees or other personnel of Customer.

- **PSA Communities:** PSA Communities is a set of components enabling Salesforce Community Managers to grant designated community users secure access to limited PSA features such as Project Gantt, PSA Chatter, and read-only access to several other objects. Users of the PSA Community product may only access the following Salesforce objects and functionality: (i) Chatter, Files, People, Topics, and Profiles; (ii) Salesforce1; (iii) Force.com Sites; (iv) Products and Price Books (read-only access); (v) APIs; (vi) roles-based sharing; and (vii) workflow approvals (submit-only). Access to any other Salesforce functionality or technology as part of the PSA Community Members product is prohibited.
- **Financial Management (FM) Communities:** FM Communities is a set of components that enables a Salesforce Community Manager to grant designated community users secure access to the following FinancialForce documents: sales invoices, sales credit notes, cash entries, and billing documents. Users of this product may only access the following Salesforce objects and functionality: (i) Chatter, Files, People, Topics, and Profiles; (ii) Accounts; (iii) Salesforce1; (iv) Force.com Sites; (v) Products and Price Books (read-only access); (vi) APIs; and (viii) workflow approvals (submit-only). Access to any other Salesforce functionality or technology as part of the Customer Community Licenses product is prohibited.

Full and Access Community Licenses

FinancialForce sells two main types of Customer and Partner Community licenses: Full and Access.

The default Partner or Customer Community license from FinancialForce is a Full license, which will include everything a user needs to log in to the Community. The FinancialForce Full Community license may only be used with FinancialForce objects.

Access licenses are an option for customers that already have Salesforce Community licenses for their users. This allows the customer to utilize their existing SalesForce Community Cloud with FinancialForce objects. Each user who will have an Access license must maintain the corresponding Community license subscription from Salesforce.

Member and Login Licenses

FinancialForce has two options for the frequency in which a user accesses the communities, Member and Login.

A Member license is intended for users with frequent access. This is a dedicated license that is assigned to a specific named user which allows unlimited access to the community.

A Login license is intended for users with infrequent access. A login is purchased based on the number of logins to be used every month and is measured based on consumption of logins, not user count. For each Login that is purchased, 20 login licenses are provisioned so that a larger pool of external users may access the community. These external users will then consume one login each time they log into a site. Logging in multiple times during the same day still only consumes one login, this is referred to as a daily unique login.

For a detailed view of the use rights associated with Community licenses please refer to **Appendix H**.

Sandbox, Support and Storage

Sandbox

Sandboxes allow you to create copies of your environments for implementation, development, testing, and training without compromising the data and applications in your production environment. Sandboxes are completely isolated from your FinancialForce production organization, so anything you do in your sandboxes will not affect your production application, and vice versa. Sandboxes can be used only for development and testing, and not for production use.

Currently, there are four types of Sandboxes customers are able to purchase from FinancialForce: Access, OEM Full, Partial Copy, and Developer Pro. Sandbox licenses must co-term with a customer's overall subscription contract. Each FinancialForce customer receives a Developer Pro sandbox as part of their service. Customers can also purchase a Full Sandbox from Salesforce. Salesforce Sandbox definitions by type are available **here**.

We recommend that all customers have at least one Full Sandbox. Please note in order to perform push updates customers must have one of the following:

- FinancialForce OEM Full Sandbox or
- Salesforce Full Sandbox plus FinancialForce Sandbox Access

Sandbox Access

Sandbox Access allows you to enable all FinancialForce customizations, configurations, and data to be loaded into pre-existing Salesforce Sandboxes. This type of FinancialForce Sandbox license requires the customer to purchase a Sandbox from Salesforce. The access license can be for a Salesforce Full or Partial Sandbox. However, please note the limitations below of a Partial Sandbox. As stated above, while a Full Sandbox is not required it is highly recommended.

OEM Full Sandbox

This OEM Full Sandbox allows you to copy over your entire FinancialForce production configuration and all of your data, including standard and custom object records, documents, and attachments. The OEM Full Sandbox has the same storage limit as your production organization. The OEM Full Sandbox is a restricted use sandbox and can be used only to develop and test FinancialForce products. Testing of Salesforce products, custom object functionality, and/or other third-party functionality may be performed in an OEM Full Sandbox only to the extent necessary for the functioning of FinancialForce applications, product integrations, and workflows.

Partial Copy Sandbox

Partial Copy Sandboxes are configuration-only Sandboxes which allow you to copy all your production organization's reports, dashboards, price books, products, apps, and customizations, but exclude all your organization's standard and custom object records, documents, and attachments. Partial Copy Sandboxes limit storage to 5 GB of files and 5 GB of data.

Developer Pro Sandbox

Developer Pro Sandboxes are special Partial Sandboxes intended for coding and testing by a single developer. They provide an environment in which changes under active development can be isolated until they are ready to be shared. Just like Partial Sandboxes, Developer Pro Sandboxes copy all application and configuration information to the Sandbox. Developer Pro Sandboxes limit storage to 1 GB of files and 1 GB of data.

For a detailed view of the use rights associated with FinancialForce Sandboxes, please refer to **Appendix I**.

Support

Standard Success

All FinancialForce products come with a Standard Success Plan at no additional charge, with access to FinancialForce Community. Users can submit cases over the web via the FinancialForce Community or by telephone. Please see the **Standard Success Overview** for additional details.

Premier Success

Premier Success Plan adds considerable value by providing a higher level of support and engagement from FinancialForce. Premier Success includes:

- An enhanced support plan with 24/7 support and enhanced response times. Immediate focus on critical issues to ensure the customer is kept moving forward quickly. Customers may name an unlimited number of support contacts.
- Designated Customer Success Manager (CSM) to help with FinancialForce adoption, including sharing best practices, advice, and guidance on achieving customer's desired ROI and outcomes, escalating technical issues, and more.
- Four one-hour sessions during each annual subscription term with a Technical CSM to help the customer gain the most out of their FinancialForce products.
- One Subscription Training Pack to access multiple seats to our live Fundamentals and online, on-demand courses. Access to ongoing training promotes continuous learning and development and

the ability to get new hires up and running quickly. Subscription Training pack size increases with annual spend.

- One complimentary pass to FinancialForceX Summit.
- Eligibility to purchase additional support-related service: Technical Account Manager for an additional fee.

Premier Success subscriptions must co-term with a customer's overall subscription contract. Please see the **Premier Success Overview** for additional details on the services provided.

For a summary view of the FinancialForce Support please refer to **Appendix J**.

Storage

Storage is divided into two categories: File storage and Data storage. Each customer is allocated default amounts for each type of storage and may purchase additional storage if needed. User licenses that include a Salesforce OEM Embedded Platform license contribute to storage allocations.

Data Storage

For data storage, each organization is allocated either 10 GB minimum or a per-user limit, whichever is greater. Each FinancialForce user is allocated 20 MB of data storage. (For example, an organization with 20 users receives 10 GB because 20 users multiplied by 20 MB per user is 400 MB, which is less than the 10 GB minimum.) Additional data storage can be purchased in multiples of 500 MB or 10 GB.

File Storage

For file storage, each organization is allocated a per-user limit multiplied by the number of users in the organization plus a per organization allocation of 11 GB. Each FinancialForce user is allocated 2 GB. (For example, an organization with 600 users receives a total of 1,211 GB of file storage - 2 GB per user multiplied by 600 users plus the organization allocation of 11 GB.) Additional file storage can be purchased in multiples of 10 GB.

Training

FinancialForce has a wide variety of training classes available for customers. We license training in three different ways for maximum flexibility:

- Per seat licensing which allows customers to purchase seats on an a la carte method
- Subscription training packs which provide customers with the most economical path for getting multiple users trained

- Training Access allows customers with Velocity SRP Bundled SKUs access to one Training Pack - 7 Entitlements of subscription training.

Resources Summary

Below is a summary of useful resources:

OEM Embedded Platform license

Salesforce Sandbox definitions

Standard Success Overview

Premier Success Overview

Appendix A - Bundled Pricing

Below is a summary of the licenses included in each bundled SKUs. For additional use rights details please review the corresponding use rights following for each individual item.

Feature	FF Suite User	FF Suite View Only User	ERP Cloud User - Plus	PSA Billing & Revenue User - Plus	Full PSA User - Plus	PSA T&E User - Plus	PSA CRM View Only - Plus
Prerequisite		Enterprise level (or higher) Sales or Service Cloud license					Enterprise level (or higher) Sales or Service Cloud license
Premium PSA User				•			
Full PSA User	•				•		
PSA T&E User						•	
PSA CRM View Only User		•					•
Financials Full User	•		•				
Financials View, Approve, CRM User		• (Limited use, does not include approve billing and invoice data)					
Accounting Engine	•	•	•				
Billing & Collections Engine	•	•	•	• AR/ Collection and Billing Central			

Revenue Recognition Engine	•	•	•	•			
Order Procurement & Inventory Full User	•						
Procurement User			•				
Order Procurement & Inventory View & Approval User		•					
Quoting/Sales Order User	•						
FinancialForce Analytics Full User	•		•	•			
Premier Success	•	•	•	•	•	•	•
Sandbox Access	•	•	•	•	•	•	•
OEM Platform License / Contributes to Storage Allocation	•	•	•	•	•	•	•

Appendix B - Velocity SRP Bundled Pricing

Below is a summary of the licenses included in each of our Velocity SRP bundled SKUs. For additional use rights details please review the corresponding use rights following for each individual item.

Feature	Velocity SRP Full User	Velocity SRP View User	Velocity SRP T&E User
Prerequisite		Enterprise level (or higher) Sales or Service Cloud license	
Full PSA User	•		
PSA T&E User			•
Financials Full User	•		
Procurement User	•		
PSA CRM View Only User		•	
Financials View, Approve, CRM User		• (Limited use, does not include approve billing and invoice data)	
Order Procurement & Inventory View & Approval User		•	
Accounting Engine	•	•	
Revenue Recognition Engine (limited to Revenue Management for PSA)	•	•	
FinancialForce Analytics Full User	•		
Training Access	•	•	•
Sandbox Access	•	•	•
Contributes to Storage Allocation	•	•	•

Appendix C - Financial Management

Accounting Engine - Core Financials

Feature	Financials Full User	Financials Views, Approve, CRM User
Prerequisite	None	Enterprise level (or higher) Sales or Service Cloud license
General Ledger	•	
Invoicing & Project Billing	•	Read-only + Approve
Receivables and Collections	•	
Payables and Settlement	•	
Cash Management	•	
Consolidations	•	
Fixed Assets Management	•	
Financial Reporting & Action Views	•	
Salesforce Reports & Dashboards	•	• (Limited use of reporting, only as needed to utilize functionality permitted for the specific user type - specific to Invoicing & Billing)
Einstein Financial Reporting	•	
Multi-Currency, Multi-Entity, Global tax, Management	•	
OEM Platform License / Contributes to Storage Allocation (once per user for all FM engines)	•	•

Revenue Management Engine

Feature	Financials Full User	Financials Views, Approve, CRM User
Prerequisite		Enterprise level (or higher) Sales or Service Cloud license
Revenue Recognition • Recognise revenue from multiple revenue streams • Automatically calculate amount to recognise using flexible calculation methods • Revenue recognition templates	•	
Revenue Forecasting • Forecast revenue from multiple revenue streams	•	
Multi-Currency, Multi-Entity Management	•	
Financial Reporting & Action Views	•	
Salesforce Reports & Dashboards	•	• (Limited use of reporting, only as needed to utilize functionality permitted for the specific user type - specific to Invoicing & Billing)
OEM Platform License / Contributes to Storage Allocation (once per user for all FM engines)	•	•

Billing & Collections Engine

Feature	Financials Full User	Financials Views, Approve, CRM User
Prerequisite		Enterprise level (or higher) Sales or Service Cloud license
Invoicing & Project Billing	•	Read-only + Approve
Receivables and Collections • Collections Workspace • Receivables accounting • FX revaluations • Cash Entry and Cash Matching	•	
Consolidated Billing	•	
Subscription Billing & Usage Billing (Billing Central) • Integration with SF Opportunities and SF CPQ • Flexible pricing calculations	•	Read-only + Submission for Approval
Billing Contract	•	
Multi-Currency, Multi-Entity, Global tax, Management	•	
Salesforce CPQ Integration	• Assumes a Salesforce CPQ license	
Financial Reporting & Action Views	•	
Salesforce Reports & Dashboards	•	• (Limited use of reporting, only as needed to utilize functionality permitted for the specific user type - specific to Invoicing & Billing)
OEM Platform License / Contributes to Storage Allocation (per user for all FM engines)	•	•

Planning Engine

<table>
<tr><th>Feature</th><th>Full Planning Add-on for Financials Full User</th><th>Full Planning User</th><th>Contributor Planning Add-on for Financials Full User</th></tr>
<tr><td rowspan="2">Prerequisite</td><td colspan="3">Customer must have at least one Full Financials User and Accounting Engine</td></tr>
<tr><td>Financials Full User</td><td></td><td>Financials Full User</td></tr>
<tr><td>Budget Management
• Create Templates (approach, calculation rules)
• Set top-down allocations or bottoms-up budgets
• Budget from last year's actuals
• Budget Scenarios & Version management
• Excel & Google Drive import/export
• Create budget allocations / dependency calculation rules.
• Set budget Hierarchies / rollup levels
• Approval workflow & permissions management
• Single currency budgets</td><td>•</td><td>•</td><td></td></tr>
<tr><td>Budget Participation
• Enter/Edit budget values and Export/Import budget lines
• Submit and approve budget</td><td>•</td><td>•</td><td>•</td></tr>
<tr><td>Headcount Planning by Resource (reserved for Planning Engine - Tier 2)</td><td>•</td><td>•</td><td>•</td></tr>
<tr><td>Reporting
• Actual vs. Budget
• Variance Analysis
• Income Statement</td><td>•
Requires Full Financial Reporting or other Analytics license</td><td>•
Requires at least FM Analytics View User to consume pre-built reports</td><td></td></tr>
<tr><td>OEM Platform License / Contributes to Storage Allocation</td><td></td><td>•</td><td></td></tr>
</table>

Order, Procurement & Inventory

Feature	Order Procurement & Inventory Full User	Procurement User	Order Procurement & Inventory View & Approval User	Self Service Requisition User
Prerequisite		At least one Order Procurement & Inventory Full User on customer, no user license prerequisite	At least one Order Procurement & Inventory Full User on customer, no user license prerequisite	At least one Order Procurement & Inventory Full User on customer, no user license prerequisite
Inventory Management • View available inventory • Set up items for purchase or sale	•		Read-only	
Purchase Approval • Users not in a procurement role may use to view and approve purchases or spend • Access to view own Purchase Request approvals	•	•	•	Read-only
Purchase Request/Requisition • Create Purchase Requisitions for inventory or services.	•	•		•
Purchase Order Fulfillment • Convert Purchase Requisition into Purchase Order. • Create Purchase Orders for inventory or services. • Create and manage Purchase Contracts	•	•		
Sales Order Approval • Users in Sales management not Operations role may use	•		•	

to view and approve sales orders • Access to view own Sales Order approvals				
Sales Order Fulfillment • Create Sales orders and allocate available inventory to Sales Orders • Create Backorders where there is no available inventory	•			
Shipping & Receiving • Visibility of inventory to be put away, picked, shipped, inspected or received into the users warehouse. • Access to put away, pick, ship, inspect or receive inventory into the users warehouse.	•	• Receiving only		
Multi-Currency, Multi-Entity Management	•	•		
Financial Reporting & Action Views	•	•		
Salesforce Reports & Dashboards	•	•	• (Limited use of reporting, only as needed to utilize functionality permitted for the specific user type - Specific to Procurement, Orders & Inventory)	
OEM Platform License / Contributes to Storage Allocation	•	•	•	•

Quoting & Sales Orders

Feature	Quoting/Sales Order User	Order Procurement & Inventory View & Approval User
Prerequisite	At least one Order Procurement & Inventory Full User on customer, and Enterprise level (or higher) Sales or Service Cloud license on user	At least one Order Procurement & Inventory Full User on customer, no user license prerequisite
Quote Creation • Ability to Create Quotes for a product and submit for approval. • Access to view available Inventory to promise • Access to view available rebates and discounts for items for sale and apply rebates to quote	•	
Convert Quote to sales Order • Access to convert a quote to a Sales order and submit for approval	•	
Quote Approval • Users in Sales management may use to view and approve Quote • Access to view Quotes	•	•
Financial Reporting & Action Views	•	
Salesforce Reports & Dashboards	• (Limited use of reporting, only as needed to utilize functionality permitted for the specific user type - specific to OPI Quotes)	• (Limited use of reporting, only as needed to utilize functionality permitted for the specific user type - specific to OPI Quotes)
OEM Platform License / Contributes to Storage Allocation	•	•

Appendix D - Professional Services Automation

Feature	Premium PSA User	Full PSA User	PSA T&E User	PSA CRM View-Only User
Prerequisite	Billing & Collections and/or Revenue Recognition Engine	None	None	Enterprise level (or higher) Sales or Service Cloud license
Resource Management[1]: • Planners • Manage Resource Requests • Capacity Planning • Create Assignments and Tasks	•	•	Edit own assignments in planners	Read-only
Project Management: • Project Creation • Milestone Management • Budget Management • Project Accounting	•	•	Read-Only for personal assignments	Read-only
Self-Assign to Assignments	•	•	•	
Task Management	•	•	• (Update Task status only)	Read-only
Self-Service Profile and Skills Management	•	•	•	Read-only
Risk and Issue Management	•	•	• Limited to resources own assignments	Read-only
Time and Expense Approval	•	•		
Time and Expense Entry	•	•	•	

[1] **Resource record license**: If a customer wants to track *people or devices* in PSA (even if not entering T&E), a PSA Resource record license is required per person being tracked. Each Full PSA and PSA T&E user includes a PSA Resource license.

Project Gantt	•	•	Read-only	Read-only
Services Revenue Forecasting	•	•		
Feature	**Premium PSA User**	**Full PSA User**	**PSA T&E User**	**PSA CRM View-Only**
Manage Billing Events	•	•		
PSA Chatter	•	•	•	•
Community Access	•	•	• (Limited use of community, only as needed to utilize functionality permitted for the specific user type)	• (Limited use of community, only as needed to utilize functionality permitted for the specific user type)
Subcontractor Management	•	•		
PSA Reporting	•	•	• (Limited use of reporting, only as needed to utilize functionality permitted for the specific user type)	• (Limited use of reporting, only as needed to utilize functionality permitted for the specific user type)
Billing & Collections Engine Functionality restricted to AR/Collections, including Invoicing & Project Billing Receivables and Collections Multi-Currency, Multi-Entity Mgmt Salesforce Reports & Dashboards Consolidated Billing	•			
Revenue Recognition Functionality available when the engine is added Revenue Recognition				

● Recognise revenue from multiple revenue streams ● Automatically calculate amount to recognise using flexible calculation methods ● Revenue recognition templates Revenue Forecasting ● Forecast revenue from multiple revenue streams Multi-Currency, Multi-Entity Mgmt Salesforce Reports & Dashboards	•			
OEM Platform License / Contributes to Storage Allocation	•	•	•	•

Appendix E - Services CPQ

Feature	Full Services CPQ Add-On for Full PSA User	View and Approve Services CPQ Add-on for Full PSA User	View and Approve Services CPQ Add-on for PSA T&E User	View and Approve Services CPQ Add-on for PSA CRM View Only User
Prerequisite	Full PSA User (or license inclusive of full PSA license) and a SF Sales Cloud license	Full PSA User (or license inclusive of full PSA license)	PSA T&E User	PSA CRM View Only User
Services Estimating • Initiate Estimate from Opportunity • Build estimates from scratch or from Estimate Templates • Connect Estimate to CRM opportunity or Salesforce CPQ • Estimate Versions • Create Resource demand from Oppty • Price & Discount Management • Scenario Analysis • Approval Management	•	Read-only and Approve Estimate	Read-Only and Approve Estimate Limited to estimates associated with own assignments	Read-only and Approve Estimate
PSA Chatter	•	•	•	•
Contributes to Storage Allocation				

Appendix F - Financial Reporting

Feature	Financial Reporting User
Prerequisite	Financials Full User
Add Custom Fields on FF Objects	Up to 3 custom fields
Add Custom objects outside FM Objects	No
Add Custom objects from 3rd party applications or using connectors	No
Add/modify/View access to Datasets or Lenses	Yes Up to 3 custom fields
CFO Dashboards (revenue, spend, margin and EBITDA)	No
Aged Analysis Dashboard	Yes
Click through to FM object	Only if they have appropriate FM license
Basic Charting (Basic Charts (Bar), Column (Vertical Bar), Stacked Bar, Stacked Column (Vertical S. Bar), Line, Scatter, Donut, Funnel, Classic Gauge, Timeline, Combo)	Yes
Advanced Charting (Time Bar, Time Combo, Matrix, Choropleth Map, Bubble Map, Geo Map, Heatmap, Pyramid, Stacked Pyramid, Polar Gauge, Flat Gauge, Origami Funnel, Rating, Calendar Heatmap, Vertical Dot Plot, Horizontal Dot Plot, Parallel Coordinates, Metrics Radar, Treemap, Sankey, Mixed Combo, Classic KPI, Waterfall, Stacked Waterfall)	No
Number of additional datasets	0
Number of dataflows	1
Financial Report Builder	Yes
[Designer in Studio] Editing existing Dashboards	Yes

[Designer in Studio] Creating new Dashboards	Limited to specific Financial Statements dashboards Trial Balance, Cash Flow statements direct / indirect method Balance Sheet, Income Statement, Consolidated Statements, Various Variance reports (eg Property Plant & Equipment report), Actuals versus Budget comparison, Basic profitability analysis
Number of rows	25M
Data Manager	Scheduling (Start / Stop, Edit)
Collaboration	Chatter, Notification, Share to individual group, Download to Excel, Download to PDF, Saved views
Embedding via App Builder	No
Embedding via VF page	No
Embedding via Lightning Out	No
Explorer within Analytics tab	Yes

Appendix G - FinancialForce Analytics

Feature	PS Cloud Core Analytics
Prerequisite	Any PSA User (excluding PSA Resource)
Utilization Analytics ('New' Utilization) embedded dashboard	•
Project Burnup (excluding time-series prediction) embedded dashboard	•
Revenue Forecasting embedded dashboard	•
Services CPQ Estimator embedded dashboard Services CPQ Estimate Manager embedded dashboard	• (also requires Services CPQ license)
Capacity Dashboards	
Create custom dashboards	
Modify dashboards	
View custom dashboards	
Export to Excel	
Click through to PSA object	• If they have appropriate PSA license
Designer in Studio	
Data Refresh	Refresh once every 24 hours (without paid Analytics user)

	Advanced Analytics		Plus Analytics
Feature	Analytics View User	FinancialForce Analytics Full User	FinancialForce Plus Analytics Upgrade - 10 User Starter Pack FinancialForce Plus Analytics Upgrade User
Prerequisite	FM Customer, no user license prerequisite OR PSA Customer, no user license prerequisite	ALC or bundled SKUs that include a Full PSA User (or higher) or Full Financials User	**Starter Pack**: Quantity of 10 FF Analytics Full User **FF Plus Analytics Upgrade User**: Starter Pack plus a 1:1 mapping of the FF Analytics Full User
Analytics Functionality			
Add Custom Fields on FF Objects		•	•
Add Custom objects outside FF Objects (including custom objects)			Only if related to FF objects. Limited to 10.
Add Custom objects from 3rd party applications or using connectors			Up to 2 external connectors + 1 additional Heroku connector
Add/modify/View access to Datasets or Lenses		•	•
Basic Charting (Basic Charts (Bar), Column (Vertical Bar), Stacked Bar, Stacked Column (Vertical S. Bar), Line, Scatter, Donut, Funnel, Classic Gauge, Timeline, Combo)	•	•	•
Advanced Charting (Time Bar, Time Combo, Matrix, Choropleth Map, Bubble	•	•	•

Map, Geo Map, Heatmap, Pyramid, Stacked Pyramid, Polar Gauge, Flat Gauge, Origami Funnel, Rating, Calendar Heatmap, Vertical Dot Plot, Horizontal Dot Plot, Parallel Coordinates, Metrics Radar, Treemap, Sankey, Mixed Combo, Classic KPI, Waterfall, Stacked Waterfall)			
Number of additional datasets	Up to 10	Up to 10	Up to 10
Number of dataflows	Up to 10	Up to 10	Up to 10
[Designer in Studio] Editing existing Dashboards		•	•
[Designer in Studio] Creating new Dashboards		•	•
Number of rows	100M	100M	1B
Data Manager	Scheduling (Start / Stop, Edit)	Scheduling (Start / Stop, Edit), Replication, External Connectors, dataflows editor, data recipe builder/Editor, Data APIs, Dataflow APIs	Scheduling (Start / Stop, Edit), Replication, External Connectors, dataflows editor, data recipe builder/Editor, Data APIs, Dataflow APIs
Collaboration	Chatter, Notification, Share to individual group, Download to Excel, Download to PDF, Saved views	Chatter, Notification, Share to individual group, Download to Excel, Download to PDF, Saved views	Chatter, Notification, Share to individual group, Download to Excel, Download to PDF, Saved views
Export to Excel/CSV	•	•	•
Embedding via App		•	•

Builder			
Explorer within Analytics tab	•	•	•
Time-series (Trend, Prediction, Burnup)	•	•	•
Predictive Capabilities			5 Discovery & Prediction builder predictions
FM Only Functionality			
FFA Dashboards, Billing Central Dashboards, Revenue Management Dashboards, OPI Dashboards (full list found on Community)	• Only if they have the appropriate FFA, BC, RM, OPI packages installed	• Only if they have the appropriate FFA, BC, RM, OPI packages installed	• Only if they have the appropriate FFA, BC, RM, OPI packages installed
Planning Datasets	• Only if they have appropriate Planning license	• Only if they have appropriate Planning license	• Only if they have appropriate Planning license
Click through to FM object	• Only if they have appropriate FM license	• Only if they have appropriate FM license	• Only if they have appropriate FM license
PSA Only Functionality			
PSA Dashboards, Services CPQ Dashboards (full list found on Community)	• Only if they have the appropriate PSA or Services CPQ packages installed	• Only if they have the appropriate PSA or Services CPQ packages installed	• Only if they have the appropriate PSA or Services CPQ packages installed
Click through to PSA object	• Only if they have appropriate PSA license	• Only if they have appropriate PSA license	• Only if they have appropriate PSA license

Appendix H - Communities

Feature	Customer Community User - Access	Partner Community User - Access	Customer Community User	Partner Community User
Prerequisite	SFDC Customer Community License	SFDC Customer Plus or Partner Community License	None	None
FM Functionality				
Up to 1 Million Users	•		•	
FinancialForce Objects	•		•	
Financial Management Chatter	•		•	
View Invoices and Credit Notes	•		•	
Print Invoices and Credit Notes	•		•	
View Cash Entries	•		•	
Pay Invoice (with required Asperato License	•		•	
Customization and Branding	•		•	
View Invoicing & Billing Notes & Attachments	•		•	
PSA Functionality				
Scalability	Millions	300K	Millions	300K
Includes PSA Resource		•		•
Accounts & Contacts	Read-only	•	Read- Only	•
FinancialForce Objects	•	•	•	•
Salesforce Reports & Dashboards for PSA Only		•		•
Create Resource Requests		•		•

Self-Assign to Assignments		•		•
Self-Service Profile & Skills Mgmt		•		•
Enter Time & Expense		•		•
Submit Records for Approval	•	•	•	•
Approve Records		•		•
Project Gantt	•	•	•	•
Task Management	• Limited to update of existing tasks	•	•	•
Risk & Issue Management		• Limited to resources own assignments		• Limited to resources own assignments
Project Header and Milestones	Read-only	•	Read-only	•
Project Status Reports (via Output Builder)	Read-only	•	Read-only	•
Project Budgets	Read-only	•	Read-only	•
PSA Chatter	•	•	•	•
Invoicing (PSA Billing events)	Read-only	Read-only	Read-only	Read-only
Customization and Branding	•	•	•	•
Expense, Project Notes & Attachments	Read-only	•	Read-only	•
View and Approve Services CPQ Estimates	•	•	•	•

*Note: Credit card payment available for purchase separately from one of our ISV Partners, Asperato

Appendix I - Sandbox

Features	Sandbox Access	OEM Full Sandbox	Partial Copy Sandbox	Developer Pro Sandbox
Primary use case	Upgrade Testing, Integration Testing, Performance Testing in your pre-existing Sandbox from SFDC.	Upgrade Testing, Integration Testing, Performance Testing in a FF OEM Full Sandbox.	Testing configuration changes using subset of production data volumes.	Single-user access for development and configuration testing using a minimal set of data.
Prerequisite	SFDC Sandbox	None	None	None
Able to perform push updates	• (only for full SFDC sandbox)	•		
Replica of entire production organization's data	• (only for full SFDC Sandbox)	•		
Access standard objects	•	•	•	•
Access custom objects	•	•	•	•
Access reports and dashboards	•	•	•	
Access to FF data via existing Salesforce sandbox	•			
Access documents/attachments	• (only for full SFDC Sandbox)	•		
Complete copy of setup data (customization and configuration)	•	•	•	•
Data storage capacity	Production org	Production org	5GB	1GB
Access price books, products, and apps	•	•	•	
Access application and configuration information	•	•	•	•

Configure, develop, and test non-FF applications	•	Only as needed to support FF functionality (ex: integrations and workflows)	•	•

Appendix J - Support

Benefit	Standard Success	Premier Success
Pricing	Included	20% of ACV, minimum $10k
Access to support	12x5	24x7 (P1 & P2 issues)
Target initial response time	2 days	P1: 1 hour P2: 2 hours P3-5: 6 hours
Community access	•	•
Assigned customer success manager	Portfolio CSM only	•
Business reviews	•	• (quarterly)
Technical review sessions with CSM		•
Training Package		• (Varies by spend)
Passes to Community Live		1
Named support contacts	4	Unlimited
Available Add Ons	**Standard Success**	**Premier Success**
Technical Account Manager (TAM)		1:4 ratio (550 hours/year)
Training Package	Training Pack - 7 Entitlements Training Pack - 15 Entitlements Training Pack - 30 Entitlements	Training Pack - 7 Entitlements Training Pack - 15 Entitlements Training Pack - 30 Entitlements Note: Premier subscription includes one pack, based on annual Premier spend