

# PROFESSIONAL SERVICES AUTOMATION (PSA) FUNDAMENTALS



PSA Fundamentals is an introductory-level virtual course designed to help you get acquainted with the basic building blocks of the PSA application. Our intent is to ensure you have the knowledge and expertise to effectively navigate and utilize PSA application tools. This course utilizes a hands-on approach to learn key PSA concepts that address real-world professional services business scenarios.

PSA Fundamentals uses an action learning approach to completing exercises that support the participant's learning of PSA. This 3-day (18 hour) course will be delivered using a combination of lecture, demonstration and exercises.

## Audience

- New Customer Project Implementation team
- End User business roles

## Prerequisite(s)

- Solid understanding and knowledge of the Salesforce Platform
- If you are new to Salesforce, please go to - <https://developer.salesforce.com/trailhead> and review the following terminology and the Salesforce functionality that is used with Professional Services Automation.
  - Understanding Salesforce
  - Navigating and Personalizing Salesforce
  - Reports and Dashboards

## Class Length

- Virtual Instructor Led – Three 6 hour sessions
- Classroom – 3 days

## What's needed to attend

- Participants use a "hands-on" process of learning. Each participant will receive a Learning Environment for completing class exercises. Participants need to have a laptop, Internet and phone connection. It's recommended to have another device to view the course workbook.

## Great alone, better together. Cloud ERP on the Salesforce Platform

- Easy to configure and implement for fast ROI
- Flexible to change and adapt to your business
- "Clicks not code" customization and integration
- One database for your CRM and ERP gives end to end view of your business
- Break down walls between departments and eliminate the divide between front & back office



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## What you will learn in this course:

- Understand how to navigate Salesforce platform
- About standard Salesforce objects and custom PSA objects
- How custom settings and configuration options are used
- How to use schedules, work calendars and holidays
- Key PSA functionality through different end-user roles
- How to create resource, opportunities, resource requests and projects
- Understand how to use skills and certifications
- How to create milestones and project tasks
- How budgets relate to projects
- Timecard, expense report and expense management
- Billing event generation process
- About PSA reports and FinancialForce mobile applications

## COURSE OUTLINE

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### Module 1 PSA Overview

- What is PSA?
- Salesforce Overview
- Salesforce/PSA Objects
- PSA Profiles/User Roles
- PSA Licensing
- The Flow of the System

### Module 2 PSA Configuration

- PSA Administration Application
- Using Custom Settings
- Using Configuration Options
- Multi-Currency
- Time Periods

### Module 3 PSA Administration

- Regions, Practices and Groups
- Work calendars
- Holidays

### Module 4 Skills and Certifications

- Skills and Certifications Overview
- Skill and Certification Zone / Skills
- Matrix
- Resources
- Assigning Skills and Certifications to a Resource

### Module 5 Creating Opportunities

- Opportunity Overview
- Contacts/Resources
- Creating Products and Price Books
- Resource Planner
- Resource Requests

### Module 6 Creating Projects

- Projects Overview
- Key Fields and Related Objects
- Assignments Overview
- Budgets/Schedules
- Creating/Updating a Project
- Project Planner

### Module 7 Assigning Resource Requests to a Project

- Project Resource Requests
- Project Assignments
- Finding Available Resources



To find out more about FinancialForce solutions, please contact us at:

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