

FinancialForce PSA for Administrators and Developers Training

COURSE CONTENT

GET IN TOUCH



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About Multisoft

Train yourself with the best and develop valuable in-demand skills with Multisoft Systems. A leading certification training provider, Multisoft collaborates with top technologies to bring world-class one-on-one and certification trainings. With the goal to empower professionals and business across the globe, we offer more than 1500 training courses, which are delivered by Multisoft's global subject matter experts. We offer tailored corporate training; project Based Training, comprehensive learning solution with lifetime e-learning access, after training support and globally recognized training certificates.

About Course

FinancialForce PSA for Administrators and Developers Training by Multisoft Systems is a comprehensive course designed to equip professionals with the skills and knowledge needed to effectively administer and develop solutions within the FinancialForce PSA (Professional Services Automation) platform.

Module 1: Introduction

- ✓ PSA Structure and its major functions
- ✓ PSA Objects and their associated function
- ✓ Review of PSA Development Best Practices
- ✓ Don't try to change what PSA does
- ✓ Don't try to automate something that PSA already does

Module 2: Functional Overview

- ✓ Operational End-to-End
- ✓ Project Creation
- ✓ Project Setup
- ✓ Assignments
- ✓ Resource Forecasting
- ✓ Milestone Management
- ✓ Billing Events & Invoicing
- ✓ KPIs and Reporting
- ✓ Utilization
- ✓ Backlog
- ✓ Reports

Module 3: Maintaining PSA (PS Enterprise) Licenses

- ✓ Activating PSA licenses
- ✓ Deactivating PSA Licenses
- ✓ Managing additional licensed features
- ✓ Managing site licenses

Module 4: Changing PSA Configuration Groups, Options, and Values

- ✓ Managing configuration groups, options, and values

- ✓ Managing PSA custom settings

Module 5: Maintain RPGs, Time Periods, Work Calendars, and Holiday

- ✓ Creating and managing RPG hierarchy
- ✓ Maintaining & updating holiday schedules
- ✓ Maintaining & updating time periods

Module 6: Managing PSA Resources

- ✓ Resource field descriptions
- ✓ Permission controls
- ✓ Managing Resource Roles
- ✓ Adding new PSA Resources
- ✓ Deactivating PSA Resources
- ✓ Maintaining Skills and Certifications

Module 7: Global Project Setup and Maintenance

- ✓ Creating Global Projects
- ✓ Managing Global Project attributes

Module 8: Managing Missing Timecards, Backlog, and Utilization

- ✓ Calculate, Schedule, & generate Missing Timecard records
- ✓ Generate Backlog records
- ✓ Refine the utilization processing strategy

Module 9: Maintain Workflows, Email Notifications, Approval Processes, and Actuals

- ✓ Configuring and managing workflows and approval processes
- ✓ Managing automated and manual actuals processing
- ✓ PSA Actuals
- ✓ Other Scheduled Jobs
- ✓ Configuring Person Data: Users, Contacts / Resources,
- ✓ Permission Controls, Profiles, Permission Sets, Roles,
- ✓ Queues, Groups, and Sharing

Module 10: Extending PSA

- ✓ Best Practices for writing
- ✓ Apex Unit Tests
- ✓ Validation Rules
- ✓ Workflows
- ✓ Salesforce Flows
- ✓ Introduction to FinancialForce ClickLink
- ✓ Introduction to Declarative Lookup Rollup Summaries (DLRS)
- ✓ Understanding controls on
- ✓ Timecards and Expenses
- ✓ Billing Events
- ✓ Deployment
- ✓ Data
- ✓ Metadata

Module 11: Troubleshooting

- ✓ Technical Limits
- ✓ SOQL query limits
- ✓ Object limits and the expense object

- ✓ Security Issues
- ✓ Email related
- ✓ Features using Future Calls
- ✓ Assignment Rollups
- ✓ Milestone Rollups
- ✓ Estimates vs Actuals
- ✓ Salesforce Limits & Business Data
- ✓ Billing event Generation and Enterprise Billing
- ✓ Diagnostic aids
- ✓ Apex Jobs
- ✓ Debug logging