

# Certinia PSA 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

Multisoft Systems presents an enriching Certinia PSA Training, tailored for individuals aspiring to excel in Project Service Automation. This course offers an immersive learning experience, focusing on the comprehensive utilization of PSA tools to enhance project management and service delivery efficiency.

## Module 1: Introduction to Certinia PSA

- ✓ Overview of Certinia PSA and its benefits
- ✓ Understanding the role of PSA software in professional services organizations
- ✓ Navigating the Certinia PSA interface

## Module 2: User Roles and Permissions

- ✓ Different user roles within Certinia PSA
- ✓ Setting up and managing user permissions
- ✓ Ensuring data security and access control

## Module 3: Project Management

- ✓ Creating and managing projects
- ✓ Project planning, scheduling, and task management
- ✓ Tracking project progress and milestones
- ✓ Resource allocation and scheduling

## Module 4: Resource Management

- ✓ Managing your organization's resource pool
- ✓ Assigning resources to projects and tasks
- ✓ Resource utilization and optimization
- ✓ Resource forecasting and capacity planning

## Module 5: Financial Management

- ✓ Budgeting and cost tracking for projects
- ✓ Invoicing and billing
- ✓ Managing expenses and revenue
- ✓ Financial reporting and analytics

## Module 6: Time and Expense Tracking

- ✓ Recording billable and non-billable time and expenses
- ✓ Approvals and validation processes
- ✓ Integration with payroll and accounting systems

## Module 7: Reporting and Analytics

- ✓ Creating custom reports and dashboards
- ✓ Analyzing project and financial data
- ✓ Using data insights to make informed decisions

## Module 8: Integration and Automation

- ✓ Integrating Certinia PSA with other software systems
- ✓ Automating repetitive tasks and processes
- ✓ Data synchronization and data import/export

## Module 9: Best Practices and Tips

- ✓ Tips for optimizing the use of Certinia PSA
- ✓ Industry best practices for professional services organizations

## Module 10: Troubleshooting and Support

- ✓ Handling common issues and errors
- ✓ Contacting support and accessing resources for assistance