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Training Course: FinancialForce PSA for Administrators and Developers

FinancialForce PSA is the leading application on the Salesforce platform for managing Professional Services Organizations. PSA is a managed package; its architecture includes over 75 objects, 50 tabs, tens of visual force pages, and numerous scheduled jobs and batch processes. It can run as a standalone application, but also comes with OOTB integrations with SF CRM.

This interactive instructor-led course provides the foundation that developers and PSA administrators will need to understand the underlying solution, its key components, and expected behavior. In addition, it provides guidance on the administration of the basic PSA configuration items that may require future maintenance.

Although PSA shares much of the flexibility of other solutions on the Salesforce Platform, it is much closer to a financial application, and hence, is written with explicit process controls in mind. This training is not a substitute for knowledge of the Professional Services business domain.

Extend PSA with *Clicks and Code*

Pre-requisites

Participants should have an understanding of development concepts on the force.com platform and should have attended FF PSA Administrator Training and be certified at the Salesforce Platform Developer 1 level or higher. In addition, participants should be familiar with Project Management processes and functions.

Audience

This course is primarily intended for Salesforce Developers and Architects who are responsible for extending the FF PSA application on the SF Platform. SF & PSA Administrators will also benefit.

Duration

Instructor-Led session conducted on-site approximately 2.5 days in duration

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PSA Development Best Practices

Learning Objectives:

1. Describe the structure of PSA and all its major functions.
2. Create and Maintain PSA Resources, Skills, and Certifications
3. Manage Missing Timecard, Backlog, and Utilization reports
4. Maintain RPGs, Time Periods, Work Calendars, & Holidays
5. Adjust PSA Configuration Groups, Options, & Values
6. Manage PSA Custom Settings
7. Maintain Workflows, Notifications, & Approval Processes
8. Understand PSA Data Architecture
9. Understand PSA Metadata
10. Understand Limitations & Challenges of developing for PSA
 - Best Practices for development related to PSA Objects
 - Manage triggers and timing (trigger race conditions)
 - Debug code when working with managed packages
 - Understand Multi-Namespace Governor Limits
11. Tips & Tricks for successfully deploying custom code
 - Proper creation of unit tests
 - Use of test harnesses
 - Expectations around deployment process changes
12. Test for upgrades vs new deployment
13. Proper code documentation, consistency, use of comments



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Course Outline

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

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

3. Maintaining PSA (PS Enterprise) Licenses

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

4. Changing PSA Configuration Groups, Options, and Values

- Managing configuration groups, options, and values
- Managing PSA custom settings

5. Maintain RPGs, Time Periods, Work Calendars, and Holiday

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

6. Managing PSA Resources

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

7. Global Project Setup and Maintenance

- Creating Global Projects
- Managing Global Project attributes

8. Managing Missing Timecards, Backlog, and Utilization

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

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

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

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

