Icon1 Data Sheet
Accelerate Your Certinia PSA Deployment

Overview

Icon1 is Icon Cloud Consulting's pre-configured Certinia PSA foundation that delivers working software in weeks, not months. Built on Certinia's proven Accelerate methodology and Icon's 14 years of PSA implementation expertise, Icon1 provides a comprehensive, production-ready PSA solution from day one.

Key Benefits

Rapid Time-to-Value

- Production go-live capability within 2 weeks
- Working software in end users' hands immediately
- Significantly reduced implementation costs vs. traditional approaches

Production-Ready Foundation

- Pre-configured unmanaged metadata, data, and documentation
- Fully configured to operate in your production environment
- Leverages Certinia PSA's native capabilities for maximum supportability

Extensible Architecture

- Establishes foundation that accommodates future PSA roadmap
- Upgrade compatibility maintained
- Built for scalability and growth

Icon1 Live Deliverables

Applications (5)

- PSA Consultant
- PSA Finance
- PSA Services Leader
- PSA Operations
- PSA Project Manager and Resource Manager

Workspaces (6)

- Services Delivery
- Services Billing
- Services Forecast
- Services Leader
- Project Management
- Resource Management

Dashboards (5)

- PSA Finance
- PSA Services Leader
- PSA Project Manager
- PSA Resource Manager
- PSA Sales

Additional Components

- 25 Flows for automated processes
- 6 Page Layouts & Lightning Pages configured by Role/User
- 8 Permission Set Groups and 9 related permission sets
- Custom Reports for comprehensive analytics

Complete Setup Included

Certinia Configuration

- Time Periods, Holidays, Work Calendars
- Regions, Practices, Groups (RPGs)
- Internal Projects and Default Project Templates
- Default Rate Card setup
- Utilization and forecasting initialization

System Configuration

- Page Layout activation
- Client Role configuration and mapping
- User setup for smoke testing by Role
- Permission controls by User
- Project Creation from Opportunity workflow
- Mapping for projects, resources, and tasks

Documentation & Training

Comprehensive Documentation

- User Guide
- Data Migration Toolkit
- System Admin Toolkit

Hands-On Training

- End-to-end walkthrough by Role (2 hours)
- Admin PSA Walkthrough (1 hour)
- Office Hours for ongoing support

Implementation Process

5-Stage Deployment

Stage 1: Complete Prerequisites

- Icon user setup with Admin access
- 5 Salesforce Users identified/setup
- Client Resource Roles definition
- Certinia Accelerate onboarding completion

Stage 2: Icon1 Onboarding & Configuration

Stage 3: Non-PSA Layout Updates

- Account, Opportunity, & Product layouts
- Include PSA fields and features

Stage 4: Demo & Admin Handoff

- Complete end-to-end demonstration
- Documentation review

Stage 5: Go Live with PSA

Investment

Icon1 Live: $5,995

Timeline: 2 weeks for deployment