FinancialForce

# FinancialForce Professional Services Automation. The #1 PSA app on the Salesforce platform.

FinancialForce Professional Services Automation™ (PSA) leverages the power of Salesforce CRM and the Salesforce platform™. Gain unprecedented visibility into your business across sales, services delivery, and finance. Keep projects on time, customers happy and reports up to date–all on one integrated platform.

## OPTIMIZE YOUR UTILIZATION WITH FINANCIALFORCE PSA

FinancialForce PSA streamlines processes to effectively manage projects and portfolios of projects. Automated billing and invoicing, time and expense management, sales collaboration, services handoff, and resource management improve project success and increase profitability. FinancialForce PSA harnesses the power of cloud computing on the Salesforce platform to meet the needs of professional services organizations, putting…

- an end to siloed information and unreliable, time consuming, inconsistent manual workarounds.
- an end to the fragmented communications between sales and services.
- an end to the poor visibility with real-time data, estimates, projections.

Native integration with Salesforce CRM leverages the scalability and flexibility of the world's leading enterprise cloud platform while focusing your IT spend on improving your apps, not managing the underlying technology.

## ALIGN SALES, SERVICES AND FINANCE AROUND THE CUSTOMER

FinancialForce PSA starts with opportunities and progresses through the hand-off between sales and services, through project delivery, billing and cash collections. It is embedded in Salesforce CRM, enabling sales teams to get real-time visibility into each project's status, resource availability and project history. Consulting managers have visibility into the pipeline, so the right resources are ready at the right time. And management benefits from a complete view of the business from beginning to end and top to bottom.

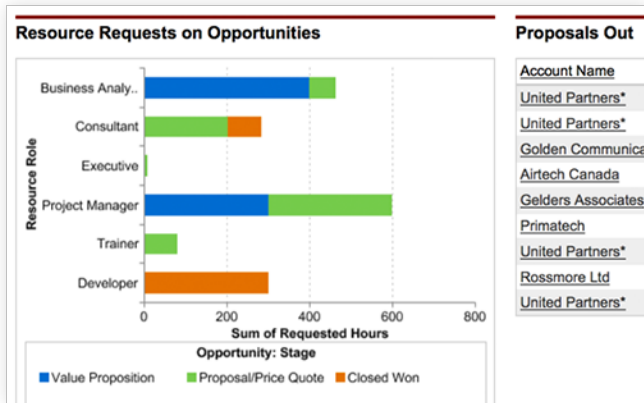## TECHNOLOGIES FOR TEAMWORK AND SOCIAL PROJECT MANAGEMENT

The platform also enables mobile devices, customer portals, workflow engines, and analytic tools to support a "people"-oriented business 24x7. Chatter, the social app, brings Facebook-like collaboration functionality to project delivery. It allows sales and project team members to create project Chatter groups and discussion streams.

## ONE TEAM, ONE SOLUTION, ONE VIEW OF THE CUSTOMER

What this means for your team is better visibility into: the services pipeline; demand on resources; target start dates; customer interactions; active projects; issues and risks; billing details; and, best of all, a single view of the customer. And as Services Performance Insight (SPI) has recently noted, companies that have greater visibility achieve higher win-rates, utilization and services margins.

## HARNESS THE POWER AND EASE OF SALESFORCE, THE #1 CLOUD PLATFORM

- Real-time analytics.
- Mobile device support.
- Chatter, social collaboration tool for business.
- Configuration and integration tools.
- Easy integration for your custom and third party applications with FinancialForce ClickLink™.
- Authorization workflow tools.
- Development tools to build your own app on the same cloud in less than 1/5 the time.
- 2900+ applications listed on the AppExchange.

## SALES COLLABORATION: SALES AND SERVICES SYNERGY

- One system, end-to-end on the Salesforce platform.
- Share the same customer account object.
- No more siloed data.
- Sales visibility into customer projects.
- Services visibility into opportunities and resource requests.
- Services handoff – be proactive, start projects the right way
- Convert opportunities into projects in a click.
- Eliminate unnecessary re-keying and system interfaces.
- Proactively plan resources and schedules.
- Involve the services team in the sales cycle at the right time.
- Resource requests and soft booking of resources.

## RESOURCE MANAGEMENT: PUT THE RIGHT PEOPLE ON THE RIGHT PROJECTS EVERY TIME

- All resource details tracked in one location.
- Team visibility to scheduling and assignments.
- Intuitive views into availability and capacity.
- Skills & certifications matrix.
- Skills catalogs and capacity planning.
- Multiple work calendars.
- Ability to do charge-backs.
- Effective dating.

## MORE INFORMATION

Contact us at
info@realdolmen.com or
call us: +32 2 801 55 55.

## ABOUT REALDOLMEN

As a Salesforce SILVER Consulting Partner, Realdolmen offers strategic advise and certified consultancy for the Salesforce products and Force.com® platform.

Realdolmen is the FinancialForce partner in Belgium and offers skills and expertise related to the FinancialForce product portfolio.

## PROJECTS & PORTFOLIOS: GET THE WHOLE PICTURE

- Region, Practice, and Group portfolio management.
- Real time roll-ups of utilization, cost, and revenue.
- Visual dashboards and forecasting tools.
- Backlog tracking.
- Project governance.
- Services forecasting.
- Project status reporting and alerts.

## TIME & EXPENSE MANAGEMENT: INTUITIVE, AUTOMATED AND EFFICIENT SYSTEMS

- Fast, single-click timecard entry.
- Mobile time and expense entry for iPhone or Android.
- Delegated time & expense entry.
- Flexible approvals and routing.
- Missing timecard alerts, based on region or practice.
- Expense limits & rates.
- Multicurrency expense.
- Secure, branded portal for vendor T&E entry.

salesforce silver consulting partner

FinancialForce

---

info@realdolmen.com
WWW.REALDOLMEN.COM

A. Vaucampslaan 42
B-1654 Huizingen
TEL +32 2 801 55 55

REALDOLMEN