FINANCIALFORCE

Getting Started with PSA Communities

For PSA Spring 2019

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Confidential

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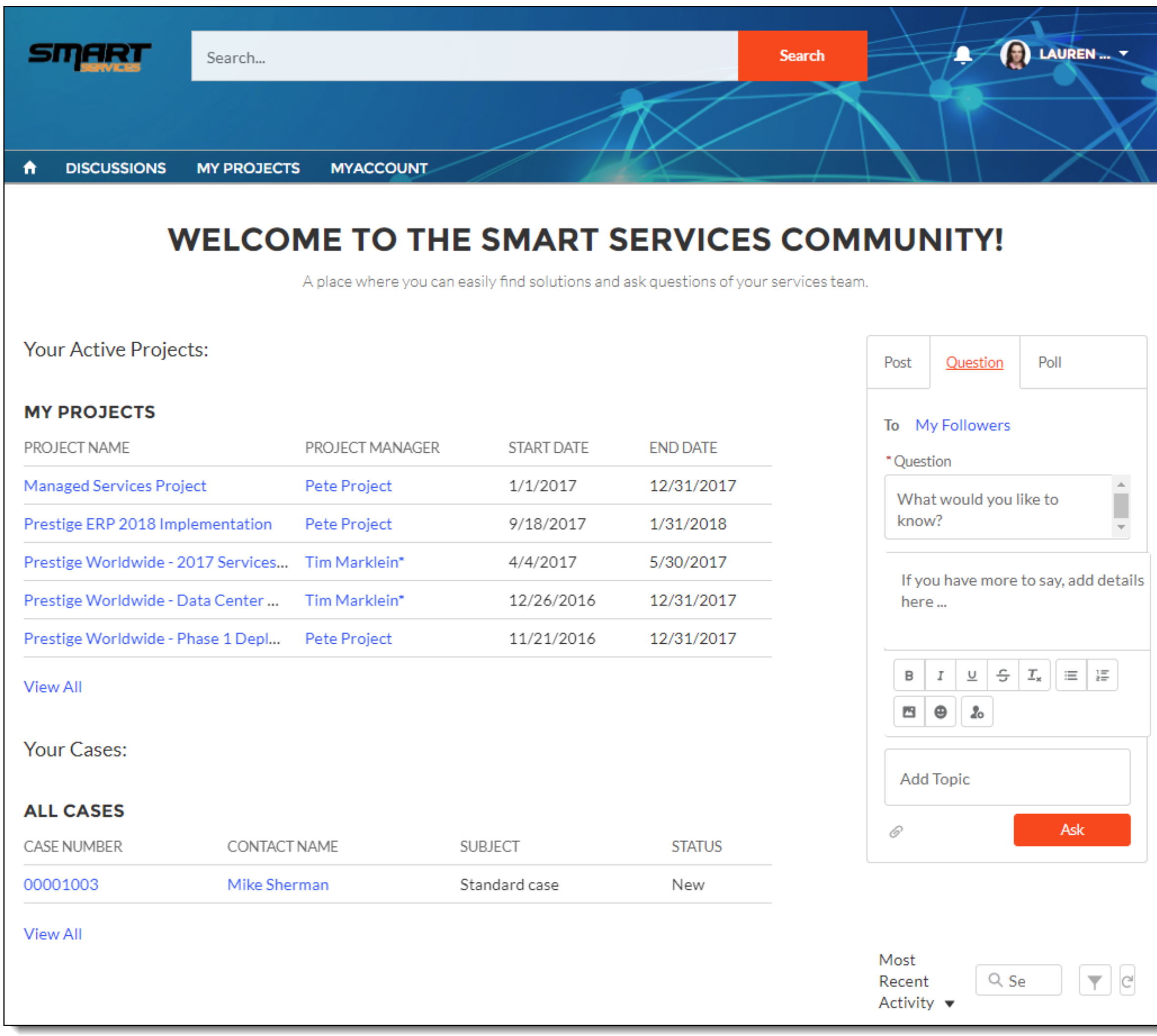
Introducing Communities

Welcome to FinancialForce PSA Communities for FinancialForce Professional Services Automation (PSA) V15 or later. FinancialForce PSA Communities is a set of components enabling Salesforce Community Managers to grant designated community users secure access to PSA features.

You can use a PSA Community to share records and collaborate. For example, on a project between a project manager and stakeholders of the project. You can expose the status a project to ensure its timeline is on track. You can ask questions about a project and modify records.



You can provide PSA Community users with access to the following:

Feature	Description
Approvals and Workflows	Only available for Partner users. For more information, see "Communities User Licenses" in the Salesforce help.
Create Resource Requests	Use a resource request to ask for resources to work on a project.
Customization and Branding	Change visual elements of community templates to match the look and feel of your brand.
Expenses Approval	Submit expense reports for approval.
Expenses Entry	Enter expenses incurred by working on a project.
Invoicing	Read-only access to PSA Billing events.
Mobile Access Via the Salesforce App	Does not include the PSA mobile time and expenses applications.
Project Budgets	Use budgets to represent customer purchase orders, outbound vendor purchase orders and work orders.
Project Related Information	Milestones, Project Tasks, Budgets, Timecards, and Expenses.
Project Status Reports	Project status reports via Output Builder.
Project Task Gantt	Read-only access to Project Task Gantt to view project tasks in detail.
PSA Chatter	Use a private social network that runs within your organization.
Salesforce Files	Share documents relating to your project.
Self-Assignment	Self-assign yourself to a project.
Self Service Profile	Edit your profile, for example your title.
Skills Management	Use skills, for example, certifications, ratings, and zones.
Time Against Tasks	Enter the time that you have spent on a particular project task.
Time Approval	Submit timecards for approval. Approvers can approve or reject timecards depending on the approval process.
Time Entry	Enter time you have spent working on projects or assignments.

Feature	Description
Trust	Use the Salesforce Platform to share Chatter, data, and files as required.
Vendor Invoicing	Enable your vendors to proactively manage their own invoices.

This document describes how to configure your Salesforce Community to use these FinancialForce PSA Communities features.

> **Tip:**
> For more information about the type of community you need, search for "Salesforce Communities Overview" in the Salesforce help.

Community User and Login Licensing Options

> **Tip:**
> The key difference between a customer community and a partner community are the licenses you assign to your users.

You can provide access to PSA Community with Salesforce standard customer community and partner community licenses:

User Profile	Description
Customer Community User	Named member users requiring frequent access or heavy use. Users can login as often as required.
Partner Community User	
Customer Community Plus	As per Customer and Partner Community Users above and grants access to Salesforce reports and dashboards.
Customer Community Login User	Volume login users with variable use such as contractors rolling on and off projects requiring infrequent access. Users are restricted to the number of times they can login.
Partner Community Login User	

User Profile	Description
Customer Community Plus Login	As per Customer and Partner Community Login Users and grants access to Salesforce reports and dashboards.

Prerequisites

Before you can create your community you need a Salesforce organization (org) with FinancialForce Professional Services Automation V15 or later installed and configured. You can learn how to do this by reading “Getting Started with FinancialForce Professional Services Automation” on the **FinancialForceCommunity** website.

You also need to do the following, if you haven't already:

- Contact Salesforce and have Communities activated in your org.
- Purchase Community or Partner licenses from Salesforce.
- Purchase FinancialForce PSA Communities licenses from FinancialForce.

Setting up a Community

> **Note:**
> You need to be an administrator to set up a community.

You need to enable your community, and then create it, and also add the required tabs to it. Then you need to clone profiles and assign them to users and provide them with access to the tabs you add. You can use profiles or permission sets to provide users with access to the community. You have to setup security controls and enable record sharing between users. You need to update custom settings and configuration groups, set up workflow approval processes, and then activate your community. Optionally, you can set up emails and Chatter so that community users can communicate with each other.

You can have multiple communities in your org. You can also use a Community for both FM and PSA. Customers only see the PSA tabs or FM tabs that their profile or permission sets allow.

The information in the following sections describe how to enable, create, and setup your community.

Enabling Your Salesforce Community

Before you can create a community, choose a domain name and URL to enable your community.

> **Warning:**
> You cannot change the domain name after it has been saved.

To enabling your Salesforce community:

1. Click **Setup | Build | Customize | Communities | Communities Settings**.
2. On the Communities page, select **Enable Communities**.
3. Enter an easily recognizable domain name for your community. For example, your company name.
4. Click **Check Availability**. If your domain name is available, a success message displays. If the domain name is not available, try another name until you find one that is available.
5. Click **Save** and confirm that you want to enable your community.

Creating a Community

> **Note:**
> Community URL names must be unique across all orgs.

To create a community:

1. Click **Setup | Build | Customize | Communities | All Communities | New Community**.
2. Select the **Salesforce Tabs + Visualforce** template.
3. Click **Get Started**.
4. Enter a name for the new community.
5. [Optional] To append the community name, enter a value in the Optional URL field. For example, if your community home page is homepage.com, instead it could be homepage.com/community.
6. Click **Create**. The community is created. You are directed to the Community Workspaces page.

Adding Tabs to Your Community

You can add tabs to display in the community by the order you specify. Typically, community users have the Project tab only with other objects as related lists on this tab. Depending on your org, certain tabs may have already been added.

To add tabs:

1. Click **Setup | Build | Customize | Communities | All Communities**.
2. Under the Action header click **Workspaces**.
3. Click **Community Workspaces | Administration | Tabs**.
4. Add the following available tabs to your community:
   - Assignments
   - Chatter
   - Expense Reports
   - Home
   - Projects
   - Reports
   - Timecards
5. [Optional] Organize the tabs in the required order using the **Up** and **Down** buttons.
6. Click **Save**.

Setting up Profiles

> **Tip:**
> We recommend you use the Enhanced Profile page for these steps. For more information, see "Enhanced Profile User Interface Overview" in the Salesforce help.

Profiles are assigned when users are created. Each profile allows the users access to different objects and field level security. You can clone community profiles and enable them for members of your community. You can also clone permission sets for the same purpose. Once cloned you can then modify the profile to add object and field level access that the community users will have. For example, this could be access to fields on the project. These profiles can then be assigned to your community users by modifying their user record.

To clone profiles:

1. Click **Setup | Manage Users | Profiles**.
2. Clone the Partner Community User standard profile.
3. Enter a name.
4. Click **Save**.
5. Repeat for the following standard profiles.
   - Partner Community Login User
   - Customer Community User
   - Customer Community Login User

Providing Access to Objects

You can decide which objects and field you want to give your community users access to. A user can only see a tab if their profile allows them at least read-only access to it.

To configure object settings:

1. On the newly cloned profile click **Object Settings**.
2. Select an object from the list.
3. Click **Edit**.
4. Select **Default On** from the Tab Settings picklist.
5. Under Object Permissions, in the Permission Name table, check Read to **Enabled**.
6. In Field Permissions, grant read and edit access to the fields you want your users to view and modify.

7. Click **Save**.
8. Repeat for any further objects you want to give community users access to.

Setting up Your Role in the Community

Set up a role that enables you to manage external users of your community who are contacts on your accounts.

> **Note:**
> Set up roles for the owner of each account that you want to grant access to in your community.

To setup your role:

1. Click **Setup | Manage Users | Roles**.
2. Click **Set Up Roles**.
3. On the Creating the Role Hierarchy page, click **Add Role**.
4. In the Label field, enter a name for the role. For example, Community Manager.
5. Press Tab to automatically complete the Role Name field.
6. Click **Save**.

Assigning Cloned Profiles

You can create new users and assign them to your cloned profiles to provide the required access to your community.

> **Note:**
> To enable a partner community, enable the account as a partner and enable the users within the account as partner users.

To assign cloned profiles:

1. On the **Contacts** tab, select a contact.
2. From the Manage External User picklist, Select Enable Customer User.
3. On the **New User** page, from the User License picklist, select Customer Community.
4. From the Profile picklist, select one of the profiles you cloned.
5. Click **Save**.

Assigning Licenses to Community Users

To assign licenses to community users:

1. Click **Setup | Manage Users | Users**.
2. Select a user.
3. On the User page, in Managed Packages, click **Assign Licenses**.
4. In the Unassigned Packages list, select the PS Enterprise package to assign it to the user.
5. Click **Add**.

Providing Access to a Community

You can use the cloned profiles to decide which members can access a particular community. You can also clone and create new permission sets allowing object and field-level access required by your community users. You can provide internal and external resources with access to the community.

To assign profiles and permission sets:

1. Click **Setup | Build | Customize | Communities | All Communities**.
2. For the community you want to allow access to, select **Workspaces | Administration | Members**.
3. On the **Members** page, from the Search picklist, select Portal.
4. Add the profiles you want from Available Profiles to Selected Profiles.
5. Repeat for Available Permission Sets and Selected Permission Sets.
6. Click **Save**.

Enable Existing Partner Accounts

You must enable existing partner accounts as external accounts. For more information, search for "Create Partner Accounts" in the Salesforce help.

Define Organization-Wide Defaults

To prevent community users from viewing records they should not have access to, edit your organization-wide sharing settings to restrict external access to the following objects:

- Projects
- Timecards
- Expenses
- Expense Reports
- Assignments

- Milestones
- Budgets

To control access to the object:

1. Click **Setup | Security Controls | Sharing Settings**.
2. Click **Enable External Sharing Model**. For more information, see the Salesforce Help.
3. Under Organization-Wide Defaults, click **Edit**.
4. Change the Default External Access setting for objects to “Private”.
5. Click **OK** to accept the information messages.
6. Click **Save**.

An organization-wide default update starts and a confirmation email is sent to you when it finishes. You cannot submit any changes during the update.

Making Projects Visible to Resources in a Partner Community

You can use manual sharing to make a project visible to resources in your community.

To make a project visible:

1. Open the project you want to share in your community.
2. Click the **Sharing** button.
3. Click **Add**.
4. Select Partner Users from the Search picklist.
5. From the Available list, add the users to the Share With list.
6. Click **Save**.

Updating Custom Settings and Configuration Groups

You need to update custom settings and configuration values.

To update custom settings:

1. Click **Setup | Develop | Custom Settings**.
2. Click **Manage** on Assignment Settings.
3. Click **Edit** to view the Assignment Settings Edit page.
4. Update the custom field as shown in the table below:

Custom Setting	Custom Field Label	Value
Assignment Settings	Auto Share with New Resource	Edit

To update configuration groups:

1. Click **All Tabs | Configuration Groups** tab.
2. Update the configuration option values in the configuration groups as shown in the table below:

Configuration Group	Configuration option	Value
ASM Triggers	AssignProjectManagerToExpenseReportApprover	True
	ShareBudgetWithApprover	
	ShareExpenseReportWithApprover	
	ShareMilestoneWithApprover	
	ShareMiscellanousAdjustmentWithApprover	
	ShareTimecardWithApprover	
Budget	auto-share-with-project-manager-user	Edit
	auto-share-with-project-resources	Read
Expense	auto-share-with-project-manager-user	Read
Milestone	auto-share-with-project-resources	Read
	auto-share-with-project-manager-user	Edit
Miscellaneous Adjustment	auto-share-with-project-manager-user	Edit
	auto-share-with-project-resources	Read
Timecard	auto-share-with-project-manager-user	Read

Setting up Workflow Approval Processes

You can optionally create timecard and expense workflow approval processes for community members. Only partner users can approve records. For more information, see "Automate Your Business Processes" in the Salesforce help.

Activating Your Community

To activate your community:

1. Click **Setup | All Communities | Workspaces | Administration | Settings**.
2. Click **Activate Community**.
3. Click **OK** to accept the warning message.

Enabling Chatter

Chatter is a private social network in your organization. You can enable Chatter in your organization for your community users when they view records. For example, records relating to a project.

See the “Chatter Visibility” section in the “Who Can See What in Communities” topic in the Salesforce Help for more information. See the “Profile-Based Chatter” topics in the Salesforce Help for information about restricting access to Chatter.

If Chatter is enabled for a Community user, they can see all external available Chatter posts on the Chatter-enabled objects they can navigate to. When anyone posts a Chatter message within the PSA Community (via the community Chatter tab), only logged-in community users can see it. When someone is logged into FinancialForce Professional Services Automation, they cannot see what the community user has posted.

Enabling Feed Tracking

Enable feed tracking on the Project object so users can follow records for this object. Select project fields to track so users can see feed updates when those fields are changed.

To enabling feed tracking:

1. Click **Setup | Build | Customize | Chatter | Feed Tracking**.
2. From the list, select the **Project** object.
3. Select **Enable Feed Tracking**.
4. Select the fields for tracking.
5. Click **Save**.

Frequently Asked Questions

Here are the answers to some frequently asked community questions.

How do I buy community licenses?

FinancialForce sells Salesforce community licenses along with our own PSA licenses.

How do I add a tab to the community?

Add tabs to communities through the Community Manager. Access the Community Manager by viewing a community and then click the **Gear** icon. Select **Administration | Tabs** and add the ones you need.

Why do I see the ‘License Required’ error when trying to access the Community?

You need to assign the user a license relevant to the package you are trying to access. However, not all objects can be accessed using Community Licenses.

Why can't I edit the Read Access on my Profile?

Only custom profiles can be edited. If you cannot edit a profile, clone it and modify the cloned profile. The new profile should be editable and once changes have been made you can add it to the user then include the profile in the list of those in the members section of the Community Manager.

Why can't I create a partner user?

Only contacts associated with accounts enabled as partners can create partner users. Click **Enable As Partner** on the account record to do this.

Can I create Sharing Sets for Partner Community Users?

No. Sharing Sets are only created for Customer Community Users. Sharing Sets grant sets of concurrent users access to multiple records. For example, using Sharing Sets to share any projects that have the same account listed as that on the community user's record. For more information, search for “Sharing Set Overview” in the Salesforce Help.

Why is the tab I added not displaying for my user?

Tabs only display when users have access to them from their profile, and their profile is read-only as a minimum. Navigate to Setup and open their profile. Click Object Settings to display a list of all the objects used in your organization. Scroll to and open the object for the tab you are having issues with. Edit the tab settings to switch the default to on, and also enable the read object permission.

Why can I see the Object tab but no records?

Records have not been shared with the user. Records will either need to be manually shared with partner users using the **Sharing** button on the record, or setup a Sharing Rule or Sharing Set to share between roles. For a Customer Community User, setup a community sharing rule to share records with users that share the same account.

Contacting Customer Support

Helping You Keep Your FinancialForce Solutions Running Smoothly

FinancialForce aims to provide you with first-class, global support via a network of support centers around the world.

To get the answers you need:

- Consult the FinancialForce and Salesforce Help
- View documentation, tutorials, training, and knowledge articles in the FinancialForce Community: **https://erp.force.com/community/s/Training-Home**
- Ask a question in the FinancialForce Community: **https://erp.force.com/community/s/**
- Log a case with FinancialForce Customer Support: **https://erp.force.com/community/s/cases**

For more information and contact details, see the Support page of the FinancialForce website: **https://www.financialforce.com/support/**

Other Resources

The **FinancialForce Community** is a central hub for our customers and employees to engage, collaborate, and learn.

The FinancialForce Community provides access to features such as:

- **Free online video tutorials and on-demand learning modules**
- **Release documentation**
- **Discussion groups**
- **Case management**
- **Service pack details and documentation**

You can access the FinancialForce Community by selecting FinancialForce Central from your Salesforce org's app list, or by visiting the FinancialForce Community: **https://erp.force.com/community/s/**. To log in using your Salesforce credentials, click **Salesforce** on the Login page.

To enable your access, email community@financialforce.com or contact your customer success manager.