Getting Started with PSA Experience Cloud Sites

Spring 2021

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Experience Cloud Sites Overview

Welcome to FinancialForce PSA Experience Cloud sites for FinancialForce Professional Services Automation (PSA) Spring 2021 or later. FinancialForce PSA Experience Cloud sites are a set of components enabling Salesforce Experience Cloud site managers to grant Customer Community Plus or Partner Community Users secure access to PSA features.

You can use a PSA Experience Cloud site to keep both customers and partners in the loop by collaborating, sharing, and communicating across every aspect of a project, for example by sharing key performance indicators (KPIs) between a project manager and stakeholders of the project. Users can ask questions about a project and modify records if they have the appropriate permissions.

This guide explains how to configure your Salesforce Experience Cloud site to use the PSA Experience Cloud site features described below.

> **Tips:**
> Communities have been renamed by Salesforce to Experience Cloud sites.
>
> For more information about the type of site you need, search for "Experience Cloud Overview" in the Salesforce Help.

PSA Feature Areas

You can provide PSA Experience Cloud site users with access to the following:

Feature	Description
Billing and Invoicing	Creating and editing project and vendor billing and invoicing actions. For example, vendors can proactively manage their own invoices.
Expenses	Creating and submitting expense reports for approval and entering expenses.
Project Task Gantt	Project Task Gantt related information. This is either read only or editable, depending on the level of access granted for items such as project tasks or Project Task Gantt view.
Projects	Project related information. This is either read only or editable depending on the level of access granted for items such as milestones, project tasks, budgets, timecards, expenses, Gantt, and status reports.

Feature	Description
Resource Management	Creating resource requests for resourcing projects and self-assignment to a project.
Skills Management	Using skills and certifications.
Timecards	Creating and saving timecards, entering time or time on tasks, and submission of timecards for approval.

PSA Visualforce Pages

The following Visualforce pages have been enabled for use with your PSA Experience Cloud site. For more information, search for "Visualforce Components" in the Salesforce Help.

Topic	Visualforce Page	Description
Assignment	SelfAssignment	Self assignment page that enables resources to assign themselves to a project and choose the work pattern they will do.

Topic	Visualforce Page	Description
Billing and Invoicing	BillingEvents	Billing event generation page to create billing events.
	BillingEventsInvoice	Invoice billing events page that enables you to update the billing event records with the invoice date and invoice number.
	BillingEventsRecalcEventDetail	Recalculates the selected billing event.
	BillingEventsReleaseEventDetail	Releases the selected billing event.
	BillingEventsSchedule	Schedules Generate Billing Events for a given time.
	VendorInvoiceHelp	Opens Vendor Invoices overview in the PSA Help.
	VendorInvoiceItemHelp	Opens Vendor Invoices overview in the PSA Help.
	VendorInvoiceWizard	Add Invoice Items page.
	VendorInvoiceWizardConfirm	Enables you to search for un-invoiced items that have been approved for vendor payment.
Expenses	EditExpenseReportForward	Used to post groups of expenses against projects.
	ExpenseEntry	Page that enables you to enter multiple expenses for multiple projects.
	ManageERToApprove	Manage Expense Reports To Approve page that is used by project managers.
Gantt	GanttHelp	Opens a PSA Help page that gives an overview of Gantt.
	GanttPrintHelp	Opens a PSA Help page that explains how to print Gantt charts.

Topic	Visualforce Page	Description
Mobile Expenses	MobileExpenses	Mobile Expenses in the Salesforce app.
	MobileSubmitMultiExpenses	The Submit button used in Mobile Expenses in the Salesforce app.
Project Task Gantt	ProjectTaskGantt	Opens the project in Project Task Gantt.
	ProjectTaskGanttFrame	Blank page.
	ProjectTaskGanttHelp	Blank page.
	ProjectTaskGanttRedirect	Opens Project Task Gantt.
	ProjectTaskHelp	Opens the PSA Help page that gives an overview of Project Task Gantt.
Revenue Forecasting	RF_ActionRunHelp	Opens the Running Revenue Forecasts page in the PSA Help.
Skills Management	SkillsAndCertifications	Page that enables you to view a resource's skills and certifications.
Time Entry	PSATimecardEntry	Page that enables you to use timecards to book time against projects.

These Visualforce pages have been enabled for use in your PSA Experience Cloud site. They enable actions to be performed by clicking a button.

Topic	Visualforce Page	Button Location
Billing and Invoicing	BillingEventsInvoiceDetail	Billing Event object
	BillingEventsReleaseBatch	Billing Event Batch list view
	BillingEventsReleaseEvent	Billing Event list view
	VendorInvoiceRecalc	Vendor Invoice list view
Gantt Expense Entry	Gantt	Project object
Project Task Gantt	ProjectTaskStart	Project Task object
Resource Request	ResourceRequest	Edit button on an existing resource request

Topic	Visualforce Page	Button Location
Revenue Forecasting	RF_ProjectActionRun	Project object
	RF_OpportunityActionRun	Opportunity object

PSA Lightning Components

The following Lightning components have been enabled for use with your PSA Experience Cloud site. For more information, search for "Lightning Components" in the Salesforce Help.

Component	Description
PSA Mass Approval	Approve or reject multiple timecard or expense report records.
PSA My Weekly Summary	View the status for all your projects, assignments, and project task assignments.
PSA Time Entry	Submit timecards against assignments, milestones, and tasks associated with projects.

You need the following types of permission to access and use FinancialForce Lightning components:

- Apex class access
- Tab access
- Object
- Field

For information about the permissions required for a specific Lightning component, see the PSA Help.

Prerequisites

You must have:

- A Salesforce organization (org) with PSA Spring 2021 or later installed and configured as described in "Getting Started with PSA - New Installations". You can obtain this document from the FinancialForce Community website.
- A Salesforce Customer Community or Customer Community Login user license, and a FinancialForce PSA license.

Setting up an Experience Cloud Site

> **Note:**
> You need to be an administrator to set up an Experience Cloud site.

To set up an Experience Cloud site, you need to:

- Create your Experience Cloud site
- Build your Experience Cloud site
- Set up and assign profiles and permission sets
- Set up the workflow approval process
- Activate your Experience Cloud site
- [Optional] Set up emails and Chatter

The following sections explain how to do this.

> **Notes:**
>
> You can have multiple Experience Cloud sites in your org, with a maximum of 100.
>
> If required, you can use an Experience Cloud site for both Accounting and PSA. Your site's users only see the Accounting or PSA tabs that their profile or permission sets allow.

Creating an Experience Cloud Site

> **Note:**
> If you have not yet enabled digital experiences in your Salesforce org you will need to do so. For more information, search for "Enable Digital Experiences" in the Salesforce Help.

To create an Experience Cloud site:

1. Click **Setup** | **Feature Settings** | **Digital Experiences** | **All Sites** | **New Site**. Using Classic
   Click **Setup** | **Build** | **Customize** | **Digital Experiences** | **All Sites** | **New**.
2. Select a template:
   - Sales: Partner Central

   or
   - Service: Help Center, Customer Account Portal, Customer Service
3. Click **Get Started**.
4. Enter a name for the site.
5. Enter a value in the URL field. Your URL will render as Domain name/URL field name.

6. Click **Create**. The Experience Cloud site is created. You are directed to the Experience Workspaces page.
7. Click the **Builder** tile to begin building your site.

Building the Experience Cloud Site

You can build your Experience Cloud site by creating pages. Typically, users require access to their projects. Depending on your users' requirements, you can give them access to additional feature areas.

> **Tip:**
> For information about the basics of building an Experience Cloud site, search for "Manage Your Experience Cloud Site" in the Salesforce Help.

The most common feature areas required are:

- Projects, which can now include Gantt
- Timecards
- Expense Reports
- Assignments
- Resource Requests
- Invoicing
- Project Task Gantt
- Skills Management
- Reports and Dashboards
- Chatter

Salesforce object pages are created as standard with an Experience Cloud site. You can create pages yourself for the PSA objects and Visualforce pages you want to add to your Experience Cloud site. For more information on the Visualforce pages available, see PSA Visualforce Pages.

To create a page for a PSA object:

1. Click **Page Properties**.
2. Click **New Page**.
3. Click **Object Pages**.
4. Search for and select an object.

5. Click **Create**. The following pages are created for the object:
   - Detail
   - List
   - Related List

To create standard pages for PSA Visualforce pages:

1. Click **Pages**.
2. Click **New Page**.
3. Click **Standard Page**.
4. Select the content layout you want to use.
5. Click **Next**.
6. In the Name field, enter a name for the page. For example, Time Entry. The URL field is automatically populated.
7. Click **Create**.
8. Click **Components**.
9. Drag and drop the Visualforce Page component on "Content" on the page layout.
10. Choose the Visualforce page you wish to display from the Visualforce Page Name picklist. For example, Time Entry is PSATimecardEntry.
11. [Optional] Enter a height value in the Height field.
12. Ensure the Record ID field is blank.

To add a PSA Lightning component to a standard page:

1. Click **Components**.
2. Drag and drop the PSA Lightning component on "Content" on the page layout.
3. [Optional] Customize the Lightning component using the options available in the component's properties panel.

> **Tip:**
> For more information about other available components, search for "Create Custom Pages with Experience Builder" in the Salesforce Help.

Setting up Profiles

You can assign a profile to a user when creating a new user or modifying the record of an existing user. Each profile allows the user access to different objects. You will need to clone the Customer Community Plus User and Partner Community User profiles and enable them for members of your site. You can then modify the profile to add the permissions Customer

Community Plus users and Partner Community users need, such as access to fields on the project.

To clone profiles:

1. Click **Setup** | **Users** | **Profiles**. Using Classic Click **Setup** | **Administer** | **Manage Users** | **Profiles**.
2. Click **Clone** next to the Customer Community Plus User profile.
3. Enter a name.
4. Click **Save**.
5. [Optional] Repeat for the Partner Community User profile.

Creating Sharing Sets

You can decide which objects to give your users access to. You must create sharing sets to share the records with your users. A user can only see an object if their profile allows them at least read-only access to it.

To create a sharing set, navigate to **Setup** | **Feature Settings** | **Digital Experiences** | **Settings**. Using Classic Click **Setup** | **Build** | **Digital Experiences** | **Settings**.

For information on how to create a sharing set, search for “Set Up Sharing Sets” in the Salesforce Help.

To share records with your users:

1. In the Sharing Set Edit page, enter a label in the Label field and accept the default Sharing Set Name. Label is the sharing set label as it appears on the user interface. The Sharing Set Name is the unique name used by the API.
2. Select the profiles of the users to whom you want to provide access: Customer Community Plus User or Partner Community User.
3. Select the objects you want to grant access to.
4. In the Configure Access section, click **Edit** next to an object name to configure access for the selected profiles and enter the details below.
5. When you have finished, click **Save**.

The following table details the minimum required object permissions for a Customer Community Plus user to have access to projects, expenses and timecards:

Object Name	Minimum Permission
Assignment	Read
Exchange Rates	Read
Expense	Read Create Edit
Expense Limit	Read
Expense Report	Read Edit Create
Milestone	Read
Practice	Read
Project	Read
Project Actuals	Read
Region	Read
Resource Request	Read
Schedules	Read
Schedule Exceptions	Read **Note:** Giving Read access to this object will cause Read access to be given to the corresponding Schedule object automatically.
Time Period	Read
Timecard	Read Create Edit
Timecard Split	Read Create Edit

Setting up Permission Sets

You will need to clone or create permission sets for the same purpose as the cloned Customer Community Plus User profile. You can then modify the permission set to add the object and field level access that Customer Community Plus users need, such as Edit access to fields on the project for project managers. The minimum required permissions are shown in the table below. You can assign the permission set to your site's users by modifying their user record.

The following table details the minimum required permissions for a Customer Community Plus user to have access to projects, expenses and timecards:

Object Name	Object Permissions	Total Fields**
App Log	Read Create Edit Delete	11
Assignment	Read Edit	108
Assignment Daily Note	Read	7
Assignment Milestone	Read	7
Assignment Project Phase	Read	6
Configuration Group	Read	8
Configuration Option	Read	14
Configuration Value	Read	10
Contact	Read	141
Currency	Read	9
Currency Exchange Rate	Read	12
Expense	Read Create Edit Delete	103
Expense Limit / Rate	Read	20
Expense Report	Read Create Edit Delete	47
Group	Read	95
Group	Read	94
Practice	Read	95
Project	Read	171

Object Name	Object Permissions	Total Fields**
Project Location	Read	
Project Methodology	Read	
Project Phase	Read	9
Region	Read	95
Schedule	Read	36
Schedule Exception	Read Create Edit Delete	29
Timecard	Read Create Edit Delete	101
Timecard Split	Read Create Edit Delete	100

**Total number of fields on the object that can be made accessible to the user in line with the security requirements.

Setting up Your Role in the Experience Cloud Site

You must set up the channel manager role that enables you to manage external users of your Experience Cloud site, such as contacts on your accounts or external resources on your projects. For more information, search for "Set Up the Channel Manager Role" in the Salesforce Help.

Although there are default roles set for site users, you can also create custom roles. For more information, search for "Set Custom Site Roles" in the Salesforce Help.

> **Note:**
> You must set up a role and assign it to each account owner that you want to grant access to in your site.

Assigning Cloned Profiles and Permission Sets

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

> **Notes:**
>
> To create partner users, select the account and click **Enable as Partner**. To enable the users in the account, select the partner account contact and click **Manage External User | Enable Partner User**.
>
> To create customer users, select the contact and click **Enable Customer User**.

To assign cloned profiles:

1. On the **Contacts** tab in your org, select a contact.
2. Click **Manage External User | Enable Customer User**. The New User page opens.
3. From the User License picklist, select Customer Community Plus.
4. From the Profile picklist, select one of the profiles you cloned.
5. Complete the appropriate fields.

   > **Note:**
   > The Nickname will auto populate with a unique user number unless you specify otherwise. This will be what the users see as their "name" when they log in. For more information about User fields, search for "User Fields" in the Salesforce Help.

6. Click **Save**.

To assign your new permission sets:

1. Click **Setup | Users | Users**. Using Classic Click **Setup | Administer | Manage Users | Users**.
2. Select a user.
3. Click **Permission Set Assignments**.
4. Next to Permission Set Assignments, select **Edit Assignments**.
5. Add your new permission set to the Enabled Permission Sets list.
6. Click **Save**.

Assigning Licenses to Experience Cloud Site Users

To assign licenses to Experience Cloud site users:

1. Click **Setup | Users | Users**. Using Classic Click **Setup | Administer | 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 an Experience Cloud Site

You can use the cloned profiles to decide which members can access a particular Experience Cloud site. Your cloned or newly created permission sets enable you to manage user access. You can provide internal and external resources with relevant access to the Experience Cloud site.

To assign profiles and permission sets:

1. Click **Setup** | **Feature Settings** | **Digital Experiences** | **All Sites**. Using Classic Click **Setup** | **Build** | **Customize** | **Digital Experiences** | **All Sites**.
2. For the site you want to allow access to, select **Workspaces** | **Administration** | **Members**.
3. On the Members page, in the Available Profiles section, add any profiles that need access to the selected Profile list.

   > **Note:**
   > You must add the System Administrator and Customer Community Plus User profiles. To find Customer Community Plus User, select Customer from the Search picklist.

4. Repeat step 3 for Available Permission Sets.
5. 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 your site's users from viewing records you do not want them to access, edit your organization-wide sharing settings to restrict external access to the following objects:

- Project
- Timecard
- Expense
- Expense Report
- Assignment

- Milestone
- Budget

To control access to the object:

1. Click **Setup** | **Security Controls** | **Sharing Settings**. Using Classic Click **Setup** | **Administer** | **Security Controls** | **Sharing Settings**.
2. Click **Enable External Sharing Model**. For more information, see the Salesforce Help.
3. Click **Edit**.
4. Change the Default Internal Access setting for objects to "Private".
5. Change the Default External Access setting for objects to "Private".
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 an Experience Cloud Site

You can use manual sharing to make a project visible to resources in your Experience Cloud site.

> **Note:**
> You must add the following to your Project layout for this process to work:
>
> - Share with Project Manager checkbox
> - Share with Project Resource checkbox
> - **Share Project** button

To make a project visible:

1. On the **Projects** tab, open the project you want to share in your Experience Cloud site.
2. Ensure one of the following checkboxes is selected:
   - Share with Project Manager
   - Share with Project Resource
3. Click **Share Project**.
4. Use the picklist to select the level of access you want to grant to the project manager or resource for each object.

> **Tip:**
> If you want to assign the same level of access for all the objects shown, select the level of access that you want from the Default Access drop-down list.

5. Click **Share with Project Team**.

Updating Custom Settings and Configuration Groups

You now need to update custom settings and configuration groups.

To update custom settings:

1. Click the **Configuration Groups** tab.
2. Update the configuration option values in the configuration groups 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	AssignProjectManagerToBudgetApprover	True
	AssignProjectManagerToExpenseReportApprover	
	AssignProjectManagerToTimecardApprover	
	AssignProjectManagerToMilestoneApprover	
	AssignProjectManagerToMiscellaneousAdjustmentApprover	
	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
	auto-share-with-project-resources	None
Milestone	auto-share-with-project-manager-user	Edit
	auto-share-with-project-resources	Read
Miscellaneous Adjustment	auto-share-with-project-manager-user	Edit
	auto-share-with-project-resources	Read
Timecard	auto-share-with-project-manager-user	Read
	auto-share-with-project-resources	None

Setting up Workflow Approval Processes

You can optionally create timecard and expense workflow approval processes for Experience Cloud site users. Only partner users can approve records. For more information, see "Set Up Approvals for External Users in Your Experience Cloud site" in the Salesforce Help.

Publishing Your Experience Cloud Site

In Experience Builder, you can preview your Experience Cloud site to ensure your updates appear as expected. For more information, search for "Preview Your Experience Builder Site" in the Salesforce Help.

You must publish your Experience Cloud site for your site URL to be live and to enable login access for site members. To publish your site, click **Publish** in the toolbar. For more information, see the Salesforce Help.

Activating Your Experience Cloud Site

To activate your Experience Cloud site:

1. Click **Setup** | **Feature Settings** | **Digital Experiences** | **All Sites**. Using Classic Click **Setup** | **Build** | **Customize** | **Digital Experiences** | **All Sites**.
2. Click **Workspaces** next to the site you would like to activate.
3. Click **Administration**.
4. Click **Activate**.
5. Click **OK**.

A welcome email is sent out to all members and you can now set up Search Engine Optimization (SEO) for your site. For more information about activating your site, see the Salesforce Help.

Enabling Chatter

Chatter is a private social network in your organization. You can enable Chatter in your organizations for your site 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 an Experience Cloud site user, they can see all external available Chatter posts on the Chatter-enabled objects they can access. When anyone posts a Chatter message within a PSA Experience Cloud site via the site's Chatter, only logged-in Experience Cloud site users can see it. When someone is logged into PSA but is not logged in to the PSA Experience Cloud site, they cannot see the site's Chatter posts.

Enabling Feed Tracking

Feed tracking on the Project object enables users to follow records for this object. You can select the Project fields to track so users can see feed updates when those fields are changed.

To enabling feed tracking:

1. Click **Setup** | **Feature Settings** | **Chatter** | **Feed Tracking**. Using Classic 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**.

Updating an Existing Experience Cloud Site

To update an existing Experience Cloud site:

1. Click **Setup** | **Feature Settings** | **Digital Experiences** | **All Sites**. Using Classic Click **Setup** | **Build** | **Customize** | **Digital Experiences** | **All Sites**.
2. Click **Builder** next to the site you would like to update.

Frequently Asked Questions

Here are the answers to some frequently asked Experience Cloud site questions.

How do I buy Community Licenses?

FinancialForce sells Salesforce Community Licenses along with our own PSA licenses.

Why do I see the "License Required" error when trying to access the Experience Cloud site?

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 is editable and when 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 Channel 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 provide a group of concurrent users with access to multiple records. For example, using Sharing Sets to share any projects that have the same account listed as that on the site user's record. For more information, search for "Sharing Set Overview" in the Salesforce Help.

Why can I see the Object page 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 set up a Sharing Set to share between roles. For a Customer Community User, set up a Sharing Set 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.