



Fundamentals of Time, Expense & Billing for PSA Virtual Training

Course Overview

Fundamentals of Upland PSA is an 8-hour course that will help users familiarize themselves with Upland PSA, and how it can be used to assist them in their day to day business practices. The aim is to equip the user with the understanding and know-how to efficiently navigate the application and use each of the functional modules. The course employs a practical strategy to tackle key concepts in Upland PSA, including actual professional services business scenarios.

Upland PSA Fundamentals follows an active learning methodology by carrying out hands on exercises that encourage the participant's understanding of Upland PSA. This course will be given using a combination of lecture, demonstration and exercises.

Benefits:

This hands-on experience will allow you to gain knowledge of how to effectively manage project time and expense entries through both the application and mobile, as well as leave requests submitted through the platform. You will gain an understanding of how to invoice clients for billable Project Time and Expense entries. You will get insight into the properties and setting options impacting the process of how the entries are made. Moreover, what areas in Upland PSA are impacted by these entries. Additionally, you will acquire knowledge of how to extract Time, Expense and Leave information to facilitate the monitoring of progress and status of these entries, as well as help in any decision or action required.

You will also receive an official Certificate of Completion at the end of the course.

Course Objectives:

- Navigating the Timesheet Manager, Expense Report Manager, and Leave Request Manager pages in the platform, as well as Time and Expense Managers in Mobile.
- Reviewing of the entry process for end users through the application and mobile.
- Going through the process of managing these entries via application and mobile.
- Understanding the options in setting the properties of the entry interface and the approval process.
- Understanding Invoicing is directly affected by these entries.
- Using Out-of-the-Box Timesheet, Expense and Leave Time reports.
- Creating a Timesheet, Expense and/or Leave Time report.

Delivery Method:

- All classes are delivered online

Course Duration:

- 2-hour classes over 4 consecutive days for a total of 8 hours

Who Should Attend:

- PSA users needing to understand Time and Expense Tracking to Invoice to Customer

Pre-Requisites:

- Preferably having basic experience with PSA in general

Registration:

- See **Pricing** below
- Apr 19-22 | [Register Here](#)



- Dec 6-9 | [Register Here](#)

What's Needed to Attend:

Each participant will get access to a dedicated Learning Environment for completing class exercises. Participants need to have a laptop/computer, Internet and phone connection. Though optional, it's recommended to have another device to follow along.

Pricing:

2021 UPLAND PSA VIRTUAL TRAINING :: PRICING OPTIONS		EARLY-BIRD PRICING ENDS
EARLY-BIRD First Attendee 20% Off Standard Pricing	USD \$1,280	DECEMBER 18th Fundamentals of Upland Analytics :: Jan 25 th FEBRUARY 19th Fundamentals of OBS & WBS :: Mar 22 nd MARCH 19th Fundamentals of T&E + Billing :: Apr 19 th APRIL 9th Fundamentals of Resource Management :: May 10 th MAY 14th Fundamentals of Project Management :: Jun 14 th AUGUST 6th Fundamentals of Upland Analytics :: Sep 7 th SEPTEMBER 17th Fundamentals of OBS & WBS:: Oct 18 th NOVEMBER 5th Fundamentals of T&E + Billing :: Dec 6 th
EARLY-BIRD Second+ Attendee 15% Off First Early-Bird Attendee	USD \$1,088	
STANDARD First Attendee	USD \$1,600	
STANDARD Second+ Attendee 15% Off First Attendee	USD \$1,360	

Registration:

DATE at 9:30-11:30 AM EST | 2:30-4:30 PM GMT/BST

Register at | <https://info.uplandsoftware.com/PSA-2021-WBN-Fundamentals-of-PSA-Registration.html>

April 19th-22nd, 2021

December 6th-9th, 2021