StratisForge
SOFTWARE

PROFESSIONAL SERVICES AUTOMATION · BUILT ON THE SALESFORCE PLATFORM

StratisForge PSA

Plan projects, track what you deliver and bill clients accurately in your Salesforce org.

StratisForge PSA is professional services automation for small and mid-size services firms. Projects, actuals, change orders, billing and period close live next to your accounts and opportunities, with no sync, no spreadsheets and no second system.

From won deal to billed work

Plan
Create projects from templates or won opportunities, with tasks, rate cards and budgets.

→

Deliver
Record hours, units and expenses your way: team timecards, or project managers log them directly.

→

Change
Scope changes go through change orders with customer signature.

→

Bill
Billing runs turn approved work into billing events for your ERP.

→

Close
Close the reporting period and lock the numbers.

Key features

Actuals your way
Project managers log hours, units and expenses straight onto tasks, one at a time or in a grid. Timecards are optional: turn them on for your team, or off and out of sight.

Works with any ERP
Hand approved billing to your accounting system, or export it as CSV.

Unit-based billing
Track and bill units delivered, not just hours, for fixed-price and deliverable-based work.

Clean period close
A period-close checklist, and closed reporting periods are locked so the numbers can't drift.

Bill everything delivered
Scheduled billing runs turn approved hours, units and expenses into billing events, reviewed before they go out.

Controlled scope changes
Change orders with customer signature update budgets and keep the original baseline.

Multi-currency, multi-company
Amounts in transaction, project and corporate currency, using your own exchange rates.

Project financials
Budgets, forecasts and actuals per project, with reports and a dashboard.

Why firms choose StratisForge PSA

- **Built on the Salesforce Platform.** Your project and billing data stays in your own Salesforce org, protected by your existing security, sharing and permissions.
- **Simple and fast to deploy.** Built for small and mid-size firms that need projects, delivery tracking and billing working in weeks, not a long implementation.
- **Finance can trust the numbers.** Every financial record is tied to a reporting period, and closed periods are locked.
- **In your team's language.** Every screen, field, message and approval is available in English, French and German, so teams across Europe work in their own language.
- **No ERP lock-in.** Billing hands off to whatever accounting system you already use.

License tiers

Tier	For	Includes
Full	Project managers, finance and admins	Every feature: projects, actuals without timecards, change orders, billing, period close and reporting
Time Entry	Team members on timecards (optional)	Weekly timecards with expenses, submitted for approval
Sales	Salespeople who start projects from opportunities	Create a project from a template on an opportunity, then view it

Annual subscriptions. See the AgentExchange listing for pricing and a free trial.

Requirements

Salesforce edition	Enterprise or Unlimited
User licenses	Sales Cloud or Salesforce Platform licenses. Creating projects from opportunities needs Sales Cloud.
Languages	English, French (France) and German (Germany). Each user sees PSA in the language set on their Salesforce user record.
Install	Managed package from AgentExchange

Support

> Support comes directly from the team that builds StratisForge PSA. Email support@stratisforgesoftware.com, Monday to Friday, 9 am to 5 pm Eastern. We reply within 1 business day, and within 4 business hours if time entry or billing is down. New customers get help with setup.

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