



## PSA Data Structure Checklist

### Time Entry

- ✓ Complete Time entry/Payroll wrap
- ✓ Correct Use of Billable Rates
- ✓ Utilize Worktypes
- ✓ Correct Use of Billable/Non-Billable/Covered Time

### Tickets

- ✓ Correct Use of Service Boards
- ✓ Type/Sub-Type/Item
- ✓ Priority
- ✓ SLA
- ✓ Configuration Tagged on Ticket

### Agreement

- ✓ Robust Use of Agreement Types
- ✓ Use of Additions
- ✓ Correct Costs of Additions
- ✓ Addition on Monthly Invoice Representing User Count

### Invoices

- ✓ Invoice from PSA
- ✓ Invoice Paid Date on PSA
- ✓ Invoice Types

### General Setup

- ✓ Correct Member Costs
- ✓ Correct Configuration Counts from RMM
- ✓ Vertical Market
- ✓ Proper Use of Start Date/Close Date/End Date on Tickets/Projects
- ✓ Product Costs
- ✓ Team Roles

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