Salesforce Project Implementation Phases with Concepts (Admin + Developer)

Problem Statement: Construction companies often struggle to manage communication among multiple stakeholders such as clients, project managers, vendors, contractors, and subcontractors. Since updates, approvals, and requirements are exchanged through scattered channels like phone calls, emails, and spreadsheets, important information is often lost or delayed. This lack of a centralized system results in miscommunication, project delays, cost overruns, and reduced client satisfaction.

Proposed Solution : A tailored Construction CRM solution is needed to streamline communication, track tasks, manage vendor/contractor interactions, and provide real-time project updates, thereby improving efficiency, accountability, and client trust.

Phase 3: Data Modeling & Relationships

1. Standard and Custom Objects

Objects Used:
CUSTOM OBJECTS:

- **Project** – Central object linking tasks, payments, invoices, materials.
- **Task** – Project milestones, progress updates.
- **Payment** – Tracks installments from clients.
- **Invoice** – Auto-generated based on tasks/materials.
- **Material** – Vendor-supplied resources linked to projects.

STANDARD OBJECTS:

- **Account** – Represents companies (clients/vendors).
- **Contact** – Individual stakeholders.

Details

Description
Represents a construction project which is assigned.

API Name	Enable Reports
Project__c	
Custom	Track Activities
✓	
Singular Label	Track Field History
Project	
Plural Label	Deployment Status
Projects	Deployed
	Help Settings
	Standard salesforce.com Help Window

Details

Edit | Delete

Description
Payments for the Projects

API Name	Enable Reports
Payment__c	✓
Custom	Track Activities
✓	
Singular Label	Track Field History
Payment	
Plural Label	Deployment Status
Payments	Deployed
	Help Settings
	Standard salesforce.com Help Window

Details

Edit | Delete

Description
Defines the material needed for the projects

API Name
Material_Request__c

Custom
✓

Singular Label
Material Request

Plural Label
Material Requests

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Details

Edit | Delete

Description
The Invoice object serves as the central record for managing all financial claims against a client.

API Name
Invoice__c

Custom
✓

Singular Label
Invoice

Plural Label
Invoices

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Details

Description

API Name	Enable Reports
Account	
Custom	Track Activities
Singular Label	Track Field History
Account	
Plural Label	Deployment Status
Accounts	
	Help Settings
	Standard salesforce.com Help Window

Details

Description

API Name	Enable Reports
Contact	
Custom	Track Activities
Singular Label	Track Field History
Contact	
Plural Label	Deployment Status
Contacts	
	Help Settings
	Standard salesforce.com Help Window

RELATIONSHIPS AND FIELDS IN SITESYNC

1. **Project → Account:** Each Project is linked to an Account (customer) via a lookup.
2. **Invoice → Project:** Each Invoice can reference a Project using a lookup.
3. **Payment → Invoice:** Each Payment is linked to an Invoice using a lookup.
4. **Payment → Project:** Each Payment is linked to a Project using a lookup.
5. **Materials→ Project:** Materials are linked to Projects using Master Detail Relatiosnhip.

SETUP > OBJECT MANAGER
Task

Details	**Fields & Relationships** 10 Items, Sorted by Field Label			Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking

Fields & Relationships

FIELD LABEL ▲	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Assigned To	Assigned_To__c	Lookup(User)		✓	▼
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Planned End	Planned_End__c	Date			▼
Planned Start	Planned_Start__c	Date			▼
Progress	Progress__c	Number(18, 0) (Unique)		✓	▼
Project	Project__c	Master-Detail(Project)		✓	▼
Status	Status__c	Picklist			▼
Task Name	Task_Name__c	Text(18)			▼
Task Name	Name	Text(80)		✓	▼

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers

SETUP > OBJECT MANAGER
Material Request

Fields & Relationships
11 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL ▲	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Material	Material__c	Picklist			▼
Material Request Name	Name	Text(80)		✓	▼
Project	Project__c	Master-Detail(Project)		✓	▼
Quantity	Quantity__c	Number(18, 0)			▼
Request Number	Request_Number__c	Auto Number (External ID)		✓	▼
Requested By	Requested_By__c	Lookup(User)		✓	▼
Status	Status__c	Picklist			▼
Unit	Unit__c	Picklist			▼
Vendor	Vendor__c	Lookup(Account)		✓	▼

Details
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Object Access
Triggers
Flow Triggers
Validation Rules

Invoice

Fields & Relationships
12 Items, Sorted by Field Label

Details				
Fields & Relationships				

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL ▲	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Amount	Amount__c	Currency(18, 0)			▾
Created By	CreatedById	Lookup(User)			
Due Date	Due_Date__c	Date			▾
Invoice Name	Name	Auto Number		✓	▾
Invoice Number	Invoice_Number__c	Auto Number		✓	▾
Last Modified By	LastModifiedById	Lookup(User)			
Owner	OwnerId	Lookup(User,Group)		✓	
Project	Project__c	Lookup(Project)		✓	▾
Status	Status__c	Picklist			▾
Tax Amount	Tax_Amount__c	Currency(18, 0)			▾
Total Amount	Total_Amount__c	Formula (Currency)			▾
Vendor	Vendor__c	Lookup(Account)		✓	▾

Sidebar (Invoice): Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, Conditional Field Formatting

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Project

Fields & Relationships
12 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL ▲	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Account	Account__c	Lookup(Account)		✓	▾
Budget	Budget__c	Currency(18, 0)			▾
Created By	CreatedById	Lookup(User)			
End Date	End_Date__c	Date			▾
Last Modified By	LastModifiedById	Lookup(User)			
Location	Location__c	Text(18)			▾
Owner	OwnerId	Lookup(User,Group)		✓	
Project Code	Project_Code__c	Text(18)			▾
Project Name	Name	Text(80)		✓	▾
Start Date	Start_Date__c	Date			▾
Status	Status__c	Picklist			▾
User	User__c	Lookup(User)		✓	▾

Sidebar (Project): Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, Conditional Field Formatting

	Fields & Relationships			Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Fields & Relationships
11 Items, Sorted by Field Label

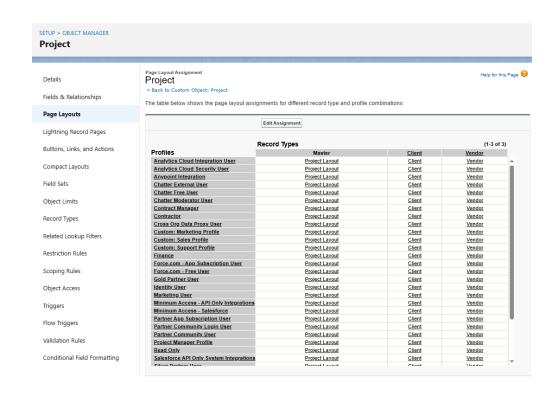| FIELD LABEL ▲	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Amount	Amount__c	Currency(18, 0)			▼
Created By	CreatedById	Lookup(User)			
Due Date	Due_Date__c	Date			▼
Invoice	Invoice__c	Lookup(Invoice)		✓	▼
Last Modified By	LastModifiedById	Lookup(User)			
Mode	Mode__c	Picklist			▼
Owner	OwnerId	Lookup(User,Group)		✓	
Paid On	Paid_On__c	Date			▼
Payment ID	Payment_ID__c	Auto Number (External ID)		✓	▼
Payment Name	Name	Auto Number		✓	▼
Project	Project__c	Lookup(Project)		✓	▼

RECORD TYPES

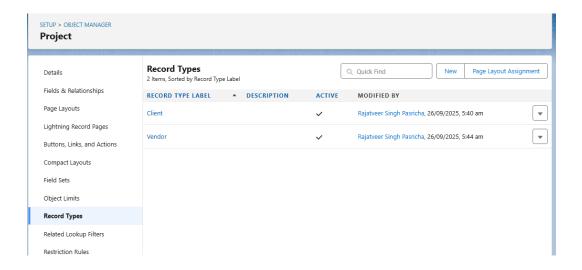**Record Types**: Different layouts for Projects, Vendors, or Clients.

Accounts →

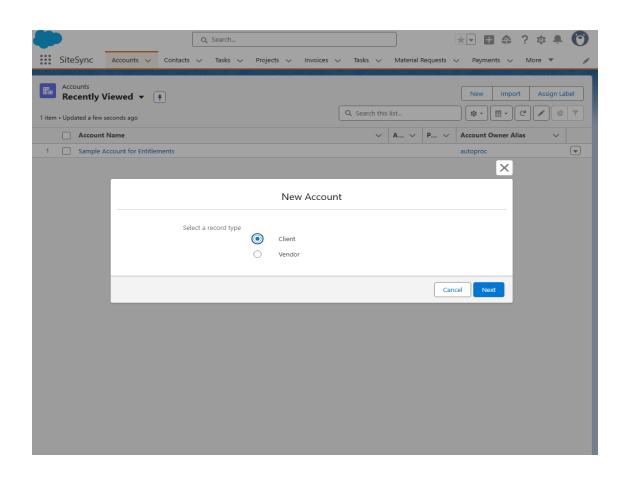- Client Account (customers)
- Vendor Account (material suppliers)

Projects →

- Construction Project
- Maintenance Project

Details

Fields & Relationships

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Validation Rules

Conditional Field Formatting

Page Layout Assignment
Project

Help for this Page

« Back to Custom Object: Project

The table below shows the page layout assignments for different record type and profile combinations.

Edit Assignment

Record Types (1-3 of 3)

Profiles	Master	Client	Vendor
Analytics Cloud Integration User	Project Layout	Client	Vendor
Analytics Cloud Security User	Project Layout	Client	Vendor
Anypoint Integration	Project Layout	Client	Vendor
Chatter External User	Project Layout	Client	Vendor
Chatter Free User	Project Layout	Client	Vendor
Chatter Moderator User	Project Layout	Client	Vendor
Contract Manager	Project Layout	Client	Vendor
Contractor	Project Layout	Client	Vendor
Cross Org Data Proxy User	Project Layout	Client	Vendor
Custom: Marketing Profile	Project Layout	Client	Vendor
Custom: Sales Profile	Project Layout	Client	Vendor
Custom: Support Profile	Project Layout	Client	Vendor
Finance	Project Layout	Client	Vendor
Force.com - App Subscription User	Project Layout	Client	Vendor
Force.com - Free User	Project Layout	Client	Vendor
Gold Partner User	Project Layout	Client	Vendor
Identity User	Project Layout	Client	Vendor
Marketing User	Project Layout	Client	Vendor
Minimum Access - API Only Integrations	Project Layout	Client	Vendor
Minimum Access - Salesforce	Project Layout	Client	Vendor
Partner App Subscription User	Project Layout	Client	Vendor
Partner Community Login User	Project Layout	Client	Vendor
Partner Community User	Project Layout	Client	Vendor
Project Manager Profile	Project Layout	Client	Vendor
Read Only	Project Layout	Client	Vendor
Salesforce API Only System Integrations	Project Layout	Client	Vendor
Silver Partner User	Project Layout	Client	Vendor

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Record Types
2 Items, Sorted by Record Type Label

Quick Find   New   Page Layout Assignment

RECORD TYPE LABEL ▲	DESCRIPTION	ACTIVE	MODIFIED BY	
Client		✓	Rajatveer Singh Pasricha, 26/09/2025, 5:40 am	▼
Vendor		✓	Rajatveer Singh Pasricha, 26/09/2025, 5:44 am	▼

PAGE LAYOUTS:

Customize what fields & sections users see, based on their profiles.

Page Layouts
6 Items, Sorted by Page Layout Name

Quick Find | New | Page Layout Assignment

PAGE LAYOUT NAME ▲	CREATED BY	MODIFIED BY	
Account (Marketing) Layout	OrgFarm EPIC, 9/21/2025, 4:15 AM	Rajatveer Singh Pasricha, 9/27/2025, 2:41 PM	▼
Account (Sales) Layout	OrgFarm EPIC, 9/21/2025, 4:15 AM	Rajatveer Singh Pasricha, 9/27/2025, 2:41 PM	▼
Account (Support) Layout	OrgFarm EPIC, 9/21/2025, 4:15 AM	Rajatveer Singh Pasricha, 9/27/2025, 2:41 PM	▼
Account Layout	OrgFarm EPIC, 9/21/2025, 4:15 AM	Rajatveer Singh Pasricha, 9/27/2025, 2:42 PM	▼
Client	Rajatveer Singh Pasricha, 9/27/2025, 2:43 PM	Rajatveer Singh Pasricha, 9/27/2025, 2:43 PM	▼
Vendor	Rajatveer Singh Pasricha, 9/27/2025, 2:42 PM	Rajatveer Singh Pasricha, 9/27/2025, 2:43 PM	▼

Page Layouts
3 Items, Sorted by Page Layout Name

Quick Find | New | Page Layout Assignment

PAGE LAYOUT NAME ▲	CREATED BY	MODIFIED BY	
Construction Project	Rajatveer Singh Pasricha, 9/27/2025, 2:56 PM	Rajatveer Singh Pasricha, 9/29/2025, 3:19 AM	▼
Maintenance Project	Rajatveer Singh Pasricha, 9/27/2025, 2:54 PM	Rajatveer Singh Pasricha, 9/29/2025, 3:19 AM	▼
Project Layout	Rajatveer Singh Pasricha, 9/27/2025, 12:49 PM	Rajatveer Singh Pasricha, 9/29/2025, 3:19 AM	▼

SCHEMA BUILDER:
Use Schema Builder to **visualize relationships**.

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