

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 4: Process Automation

1. **VALIDATION RULES:**

Purpose: Ensure data integrity by enforcing conditions before saving a record.

- **Client Account:** GST Number must be entered if Account Type = Client
- **Material Request:** Quantity must be > 0
- **Project:** Start Date < End Date



SETUP

Object Manager

Account Validation Rule

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Validation Rule Detail

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Rule Name	GST_Required	Active	✓
Error Condition Formula	AND(SRecordType.Name = "Client", ISBLANK(TEXT(GST_Tax_ID__c)))		
Error Message	GST Number is required for Client Accounts	Error Location	Top of Page
Description			
Created By	Rajatveer Singh Pasricha, 26/09/2025, 12:34 pm	Modified By	Rajatveer Singh Pasricha, 26/09/2025, 12:34 pm

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SETUP

Object Manager

Project Validation Rule


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Validation Rule Detail

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Rule Name	Start_date	Active	✓
Error Condition Formula	AND(NOT(ISBLANK(Start_Date__c)), NOT(ISBLANK(End_Date__c)), Start_Date__c > End_Date__c)		
Error Message	Project Start Date cannot be later than End Date	Error Location	Top of Page
Description			
Created By	Rajatveer Singh Pasricha, 26/09/2025, 12:36 pm	Modified By	Rajatveer Singh Pasricha, 26/09/2025, 12:36 pm

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Object Manager

Material Request Validation Rule

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Validation Rule Detail
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Rule Name	Quantity	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Quantity_c <= 0		
Error Message	Quantity must be greater than 0	Error Location	Top of Page
Description			
Created By	Rajatveer Singh Pasricha, 26/09/2025, 12:37 pm		Modified By
			Rajatveer Singh Pasricha, 26/09/2025, 12:37 pm

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2. WORKFLOW RULES:

Automate simple tasks like field updates, email alerts, and task creation based on conditions.

1. Send email to Project Manager when **Material Request is Approved** .


Workflow Rules

Edit Rule Notify_PM_On_Approval

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Step 3: Specify Workflow Actions
Step 3 of 3

[Done](#)

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	Material Request: Status EQUALS Approved	
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria	

Immediate Workflow Actions

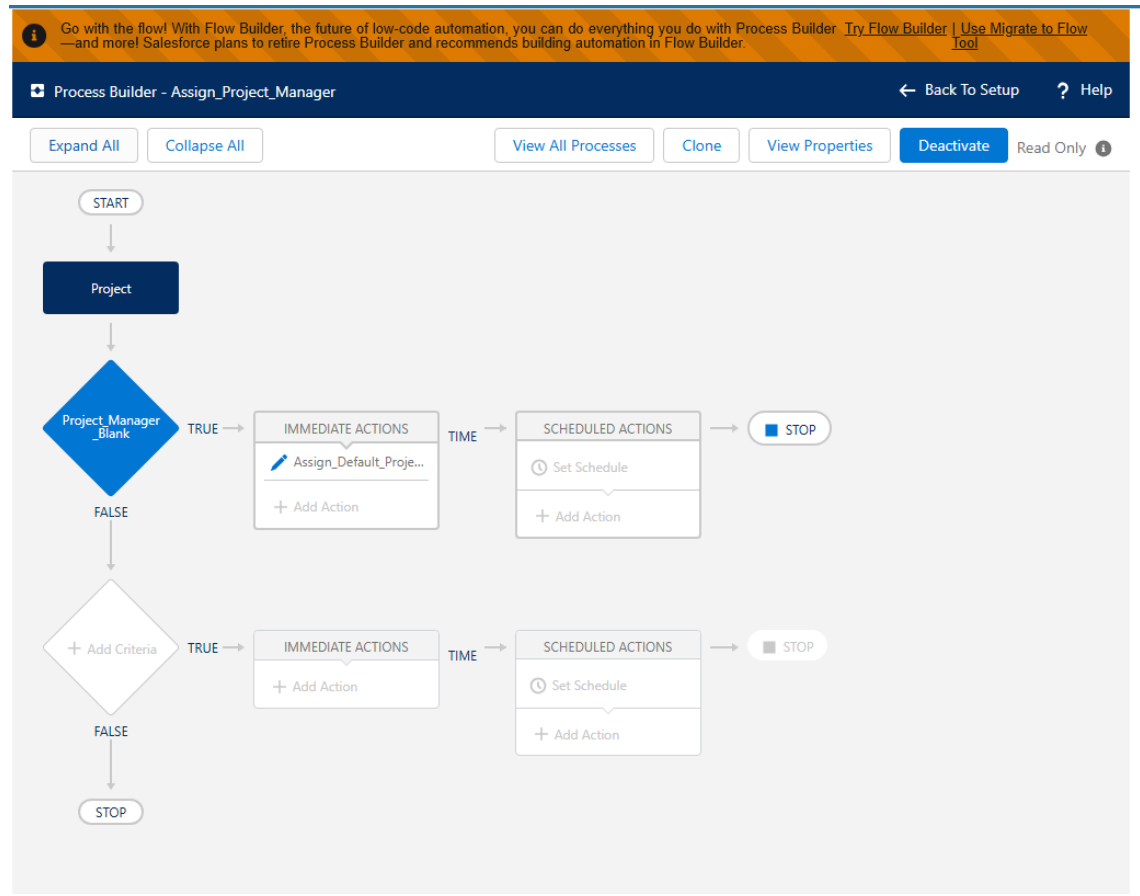
Action	Type	Description
Edit Remove	Email Alert	Email to Project Manager on Approval

[Add Actions](#)

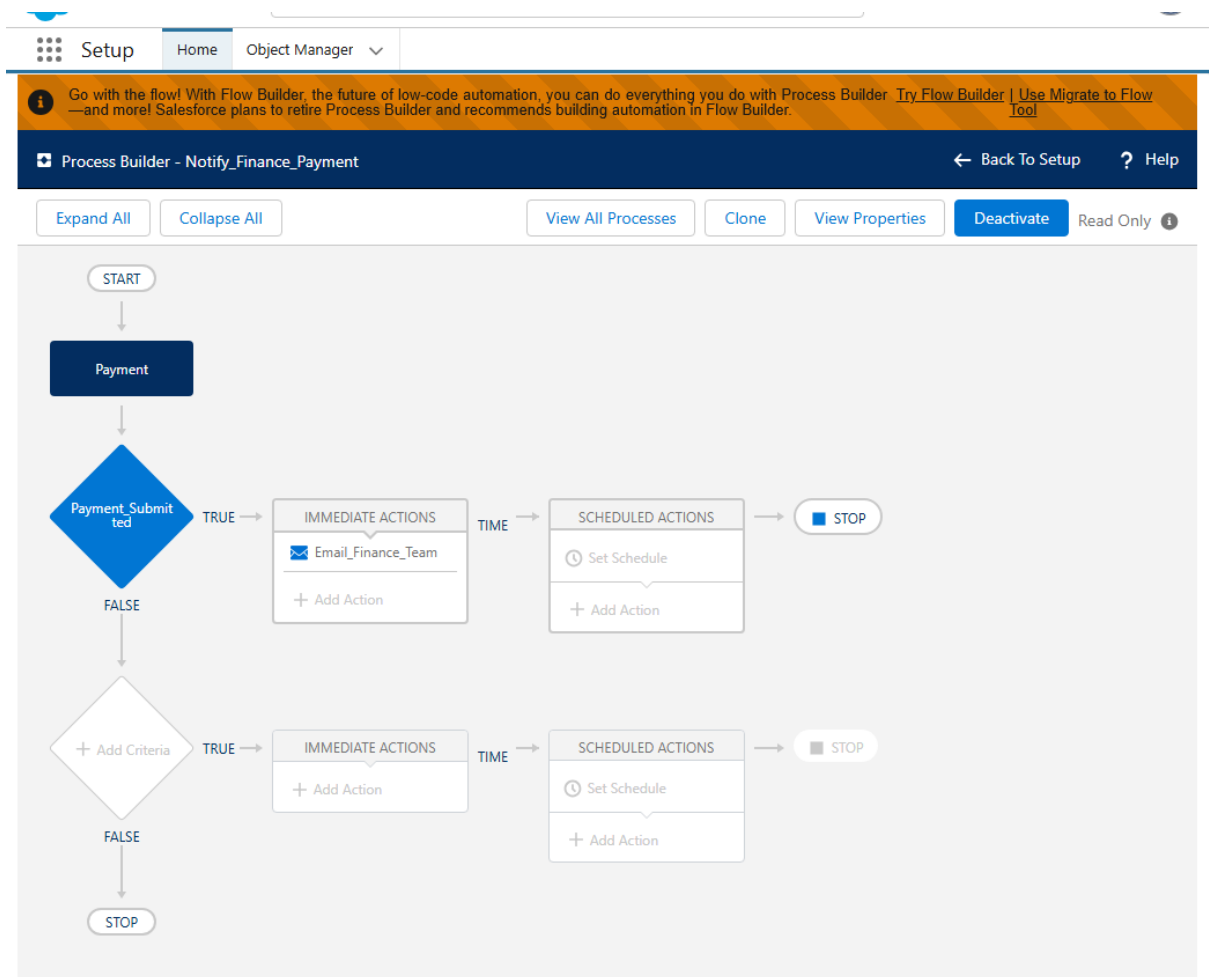
3. PROCESS BUILDER:

Automate more complex business processes with multiple criteria and actions

1. Auto-assign **Project Manager** when Project record is created



2. Notify Finance when Payment is submitted



4. FLOW BUILDER:

Advanced automation: screen flows, auto-launched flows, record-triggered flows, scheduled flows.

- Auto Update Project Status On Task Creation

Flow BuilderAuto_Update_Proj

Your automation was activated.

Last saved on 9/28/2025, 02:55 PM

ActiveRunDebugView TestsSave As New VersionSaveDeactivate

Select Elements

Auto-Layout

Record-Triggered Flow
Start

Object: Task
Trigger: A record is created
Optimize for: Actions and Related Recor...

Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Task

Run Immediately

Update Project Status
Update Records

End

Update Records

* LabelUpdate_Project_Status

* API NameUpdate_Project_Status

Description

How to Find Records to Update and Set Their Values

Use the task record that triggered the flow

Update records related to the task record that triggered the flow

Use the IDs and all field values from a record or record collection

Specify conditions to identify records, and set fields individually

Select Related Records

Records Related to Task

Triggering Task_c > Project

Multiple Project_c records can be related to the Task triggering record. If there are no filter conditions, all related records are updated.

Set Filter Conditions

Condition Requirements to Update Record

None—Update All Related Records

Set Field Values for the Project Records

FieldProject Status

ValueA In Progress

Add Field

5. EMAIL ALERTS:

Notify users automatically about events

All Email Alerts

Email alerts are used to send emails from a flow or other automation.

View: All Email Alerts Create New View

New Email Alert				
Action	Description ↑	Email Template Name	Object	Last Modified Date
Edit Del	Email to Project Manager on Approval	Material Request Approval Notification	Material Request	9/28/2025
Edit Del	Payment Submitted Alert	Payment Submitted Notification	Payment	9/28/2025

6. FIELD UPDATES:

Automatically update field values based on conditions.

The screenshot shows the Salesforce Setup interface for Field Updates. The left sidebar contains a search bar with 'field up' and a navigation menu with 'Process Automation', 'Workflow Actions', and 'Field Updates' (highlighted). The main content area is titled 'Field Updates' and shows details for a specific field update named 'Invoice Status Update'. Below the details, there are sections for 'Rules Using This Field Update', 'Approval Processes Using This Field Update', and 'Entitlement Processes Using This Field Update', each with a message indicating it is not currently used by any rules or processes. At the bottom, there is a 'Back To Top' link and a note to 'Always show me more records per related list'.

Field Update Detail

Name	Invoice Status Update
Unique Name	Invoice_Status_Update
Description	
Object	Invoice
Field to Update	Invoice: Status
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>
New Field Value	Paid

Rules Using This Field Update

This field update is currently not used by any rules

Approval Processes Using This Field Update

This field update is currently not used by any approval processes

Entitlement Processes Using This Field Update

This field update is currently not used by any entitlement processes

7. CUSTOM NOTIFICATIONS:

Push notifications inside Salesforce to users (lightweight alerts)

When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.

Custom Notification Types [New](#)

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	▼
Project_Status_Change	Project_Status_Change		✓	✓

