Salesforce Project Implementation Phases with Concepts (Admin + Developer)

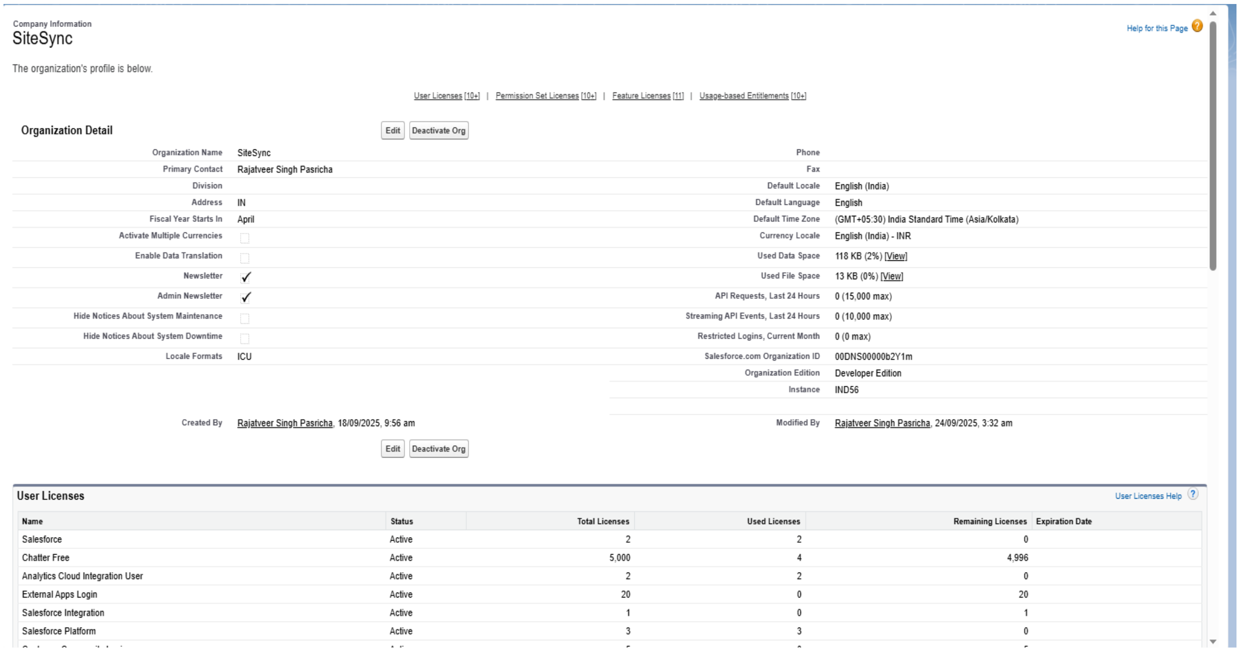
Problem Statement: Construction companies often struggle to manage communication among multiple stakeholders such as clients, project managers, vendors, contractors, and subcontractors. Since updates, approvals, and requirements are exchanged through scattered channels like phone calls, emails, and spreadsheets, 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 2: Org Setup & Configuration

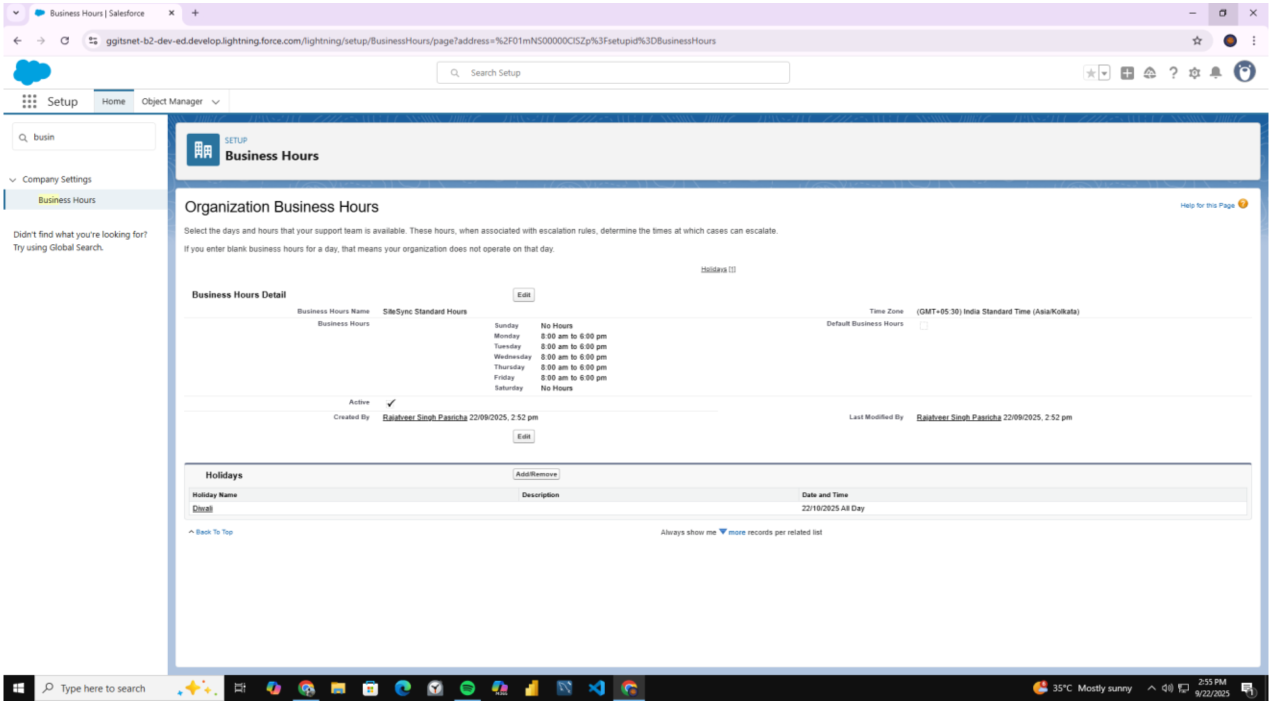
1. Company Information Setup

- **Updated Organization Name: SiteSync**
- **Default Time Zone:** Asia/Kolkata
- **Default Currency:** INR – Indian Rupee
- **Purpose:** Ensure your Salesforce org reflects the construction business identity and works in the correct regional context for projects, payments, and invoices.



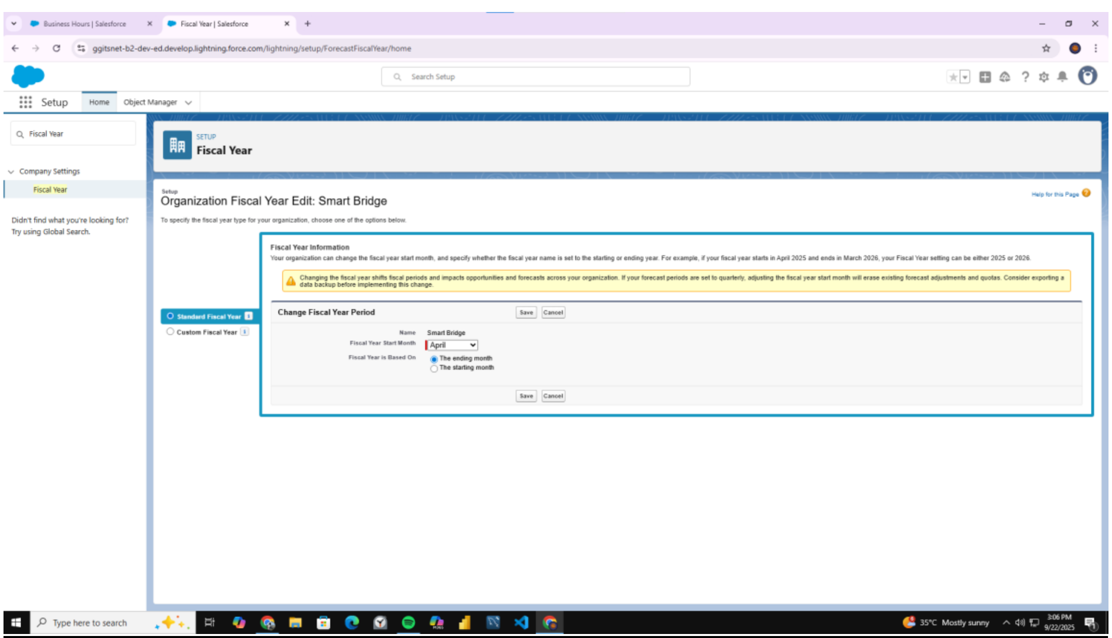
2. Business Hours & Holidays

- **Defined Construction Support Hours:** Monday–Saturday, 8:00 AM – 6:00 PM
- **Added Holidays:** Diwali
- **Purpose:** Ensure project tracking, approvals, and SLAs for Material Requests, Payments, and Project milestones align with actual working hours.



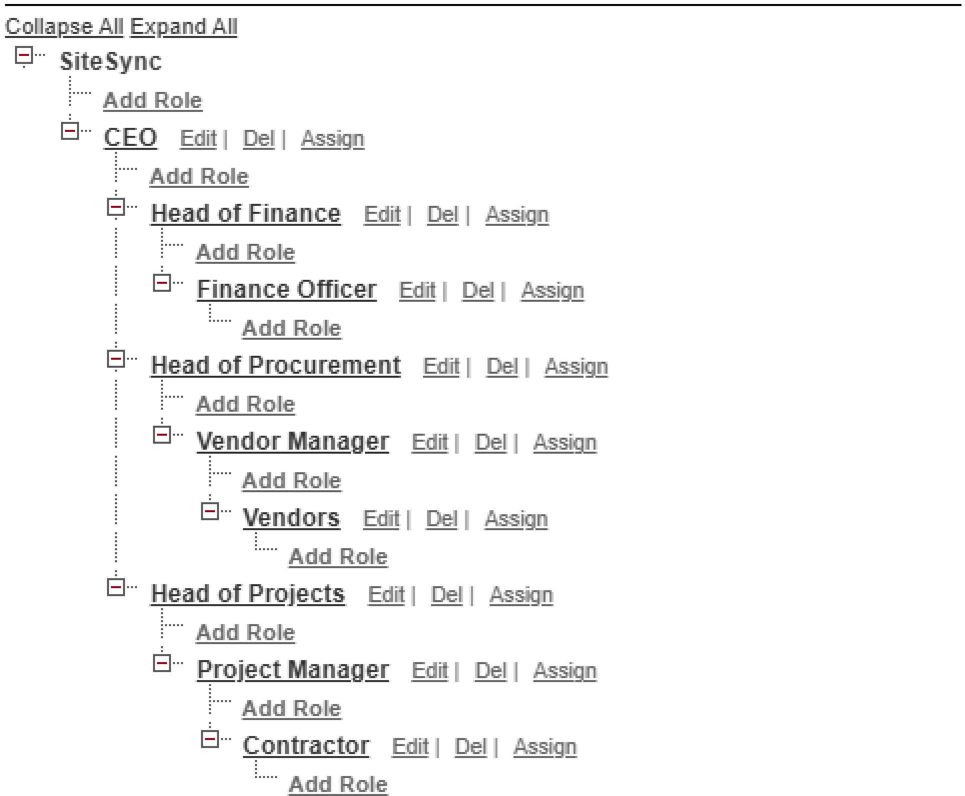
3. Fiscal Year Setup

- **Purpose:** Define the accounting and reporting period for your construction projects, payments, and invoices. Salesforce uses this for **opportunities, reports, dashboards, and forecasts**.



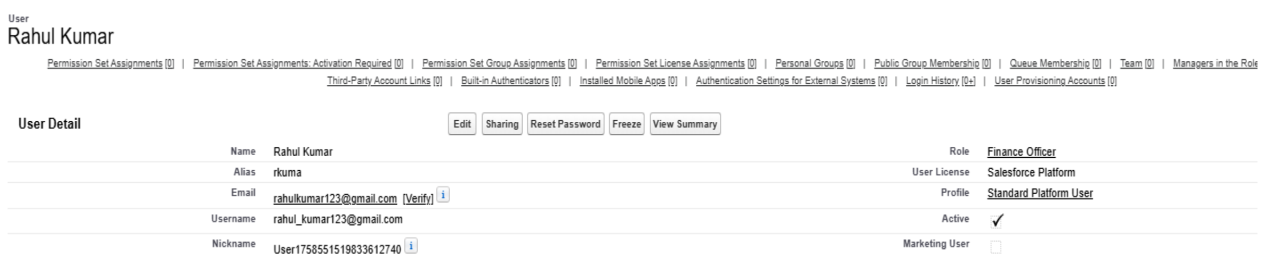
4.Role Hierarchy

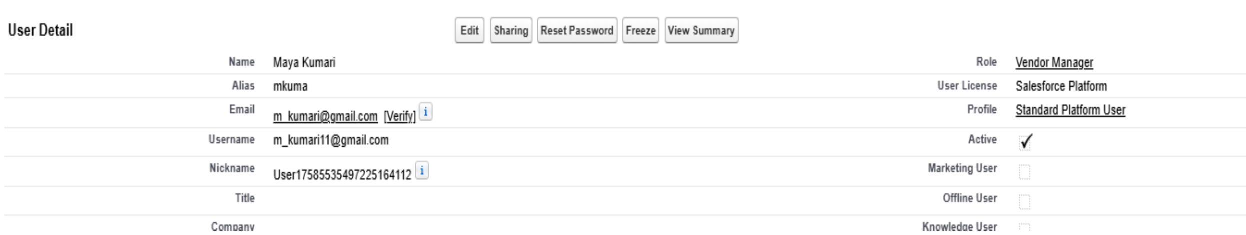
- **Created Roles:**
    1. **CEO / Admin** → top of hierarchy
    2. **Head of Project**
    3. **Project Manager** → reports to Head of Project
    4. **Head of Finance**
    5. **Finance officer** → reports to Head of Finance
    6. **Head of Procurement**
    7. **Contractor** → reports to Project Manager
    8. **Vendor** → reports to Head of Procurement

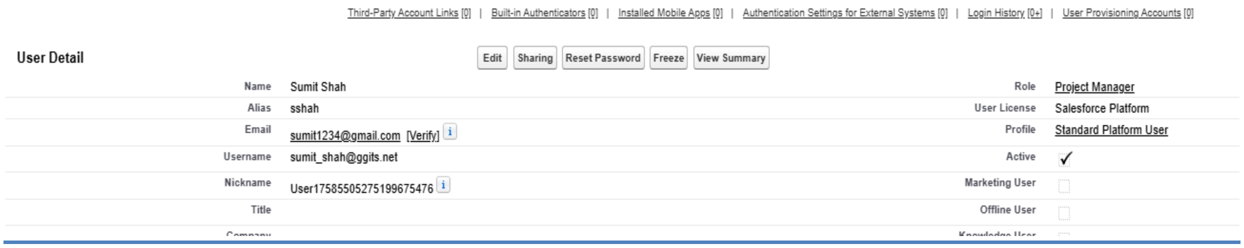


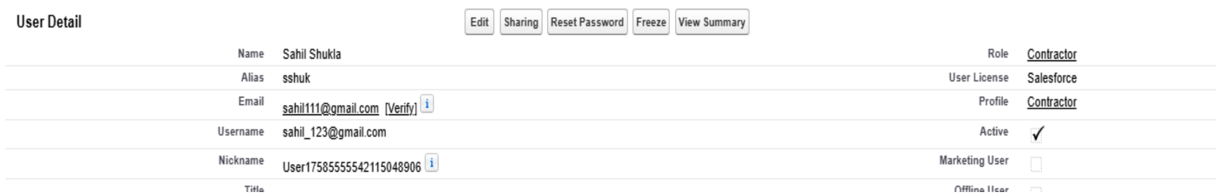
5.User Creation

- **Project Manager User:**
  - Salesforce license, Project Manager profile
  - Assigned to **Project Manager role**
- **Contractor User:**
  - Salesforce Platform license, Contractor profile
  - Assigned to **Contractor role**
- **Finance User:**
  - Salesforce license, Finance profile
  - Assigned to **Finance role**
- **Vendor Manager:**
  - Salesforce Platform license, Vendor profile
  - Assigned to **Vendor role**









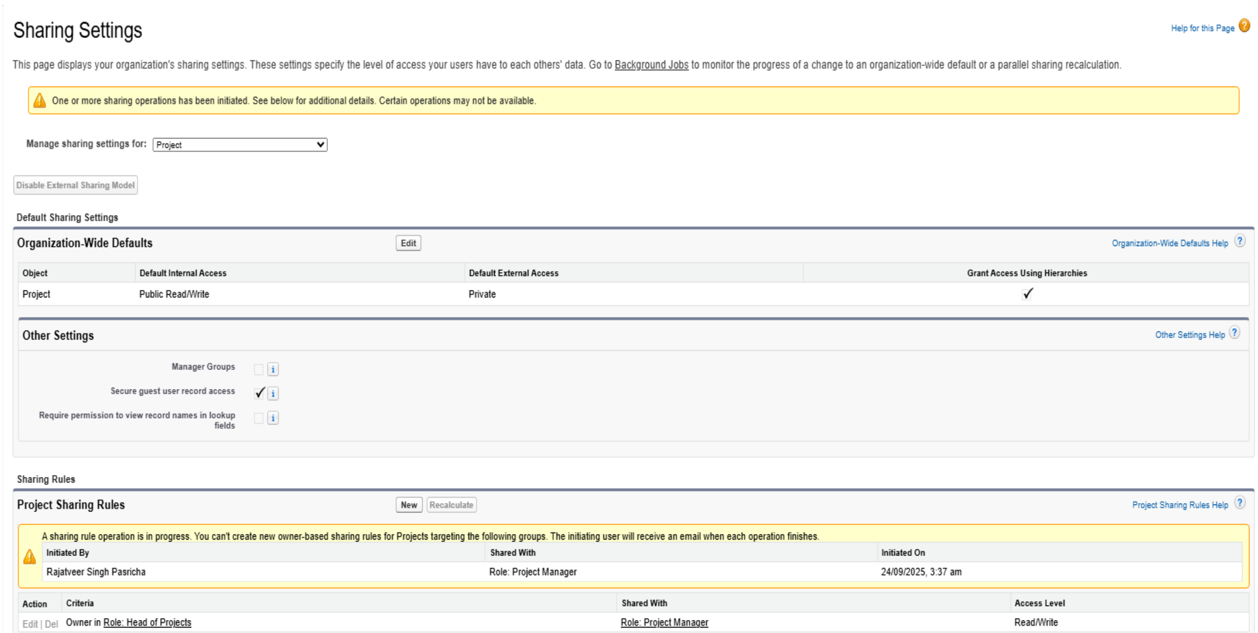
6. Organization Wise Default

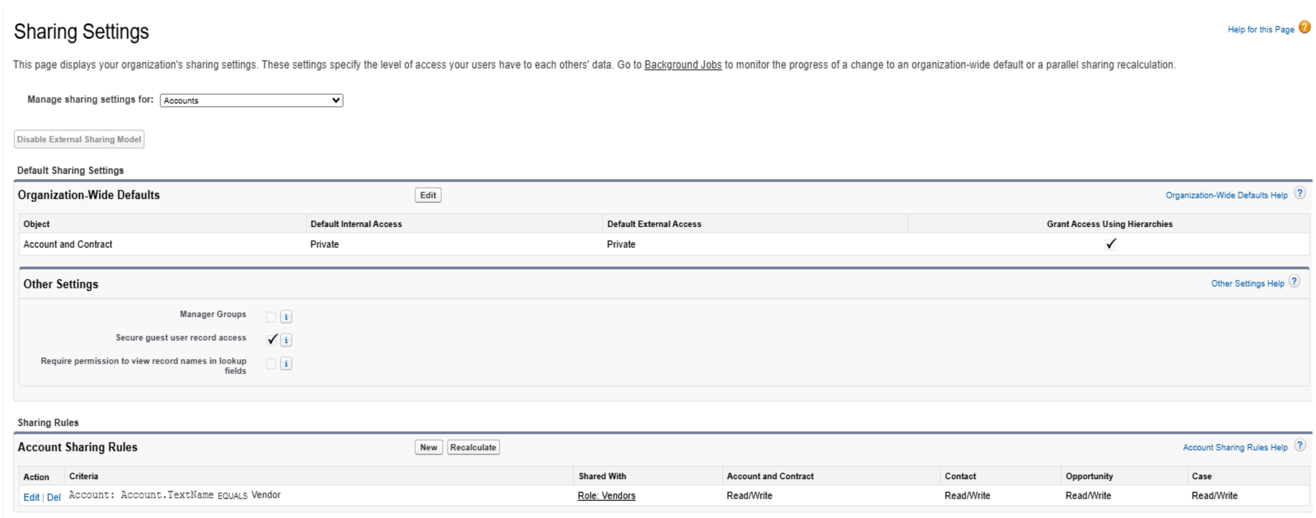
1. Accounts (Vendor Sharing)

Purpose: Vendors should access only accounts of type Vendor.

2.Projects (Project Team Sharing)

Purpose: Project Managers and assigned Contractors can collaborate on projects.

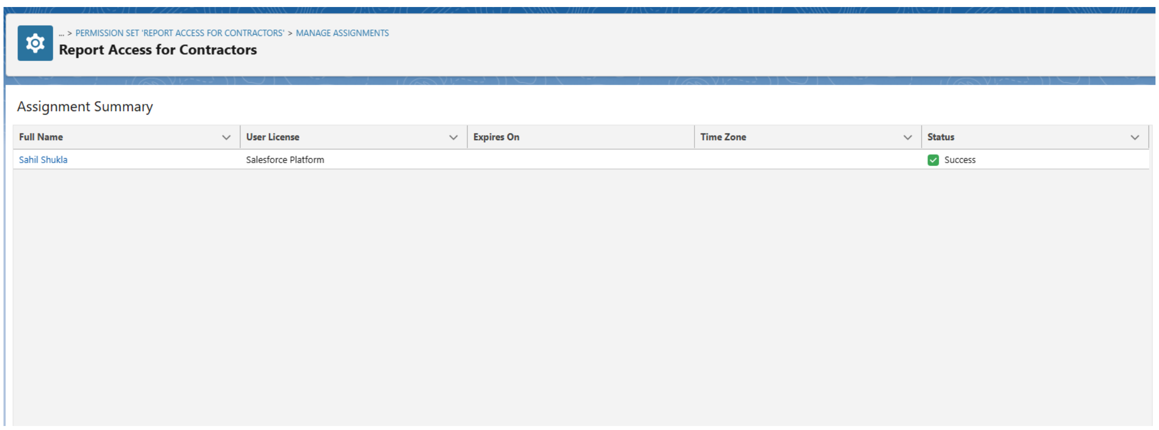


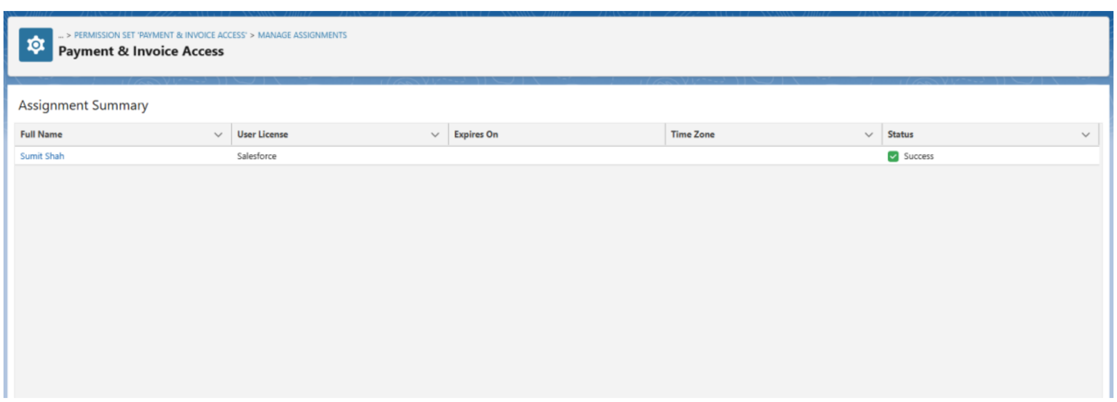


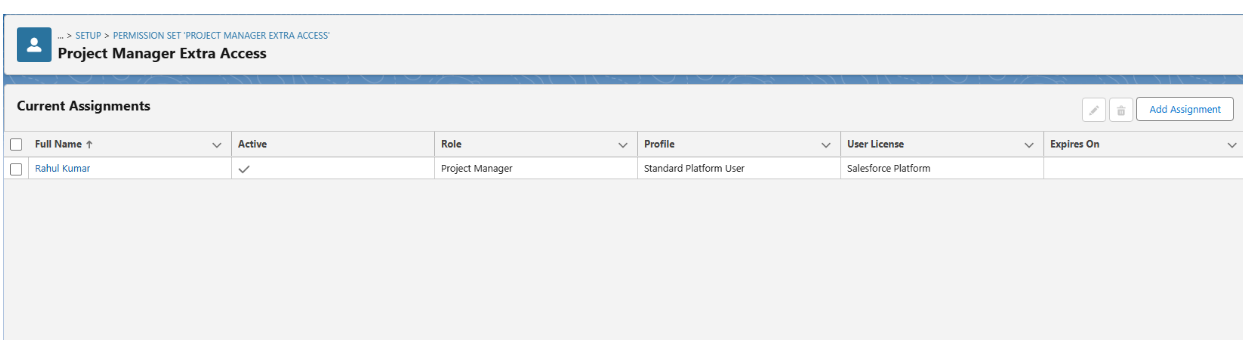
7. Permission Set and Profiles

- **Verified user profiles**: Project Manager, Contractor, Finance, Vendor
- **Created Permission Sets:**

1. **Project Manager Extra Access**
   - Objects: Projects, Material Requests, Payments
   - Permissions: Read, Create, Edit
2. **Report Access for Contractors**
   - Run Reports, View Dashboards, Export Reports
3. **Payment & Invoice Access (Finance)**
   - Objects: Payments, Invoices
   - Permissions: Read, Create, Edit (no delete)







8.Login Access Policies

- **Admins Can Log in as Any User:** Enabled
- **Users Can Grant Login Access:** Enabled (optional for support or troubleshooting)