# 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.

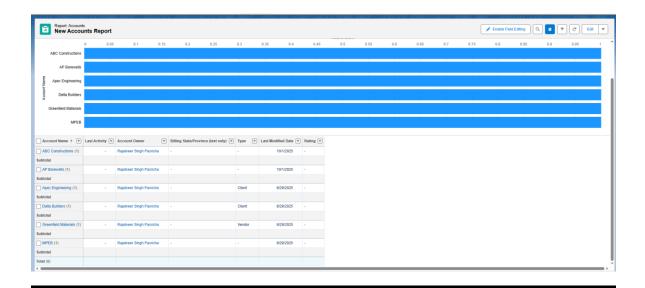
**Proposed Solution:** A tailored Construction CRM solution is needed to streamline communication, track tasks, manage vendor/contractor interactions, and provide real-time project updates, thereby improving efficiency, accountability, and client trust.

## Phase 9: Reporting, Dashboards & Security Review

#### **REPORTS:**

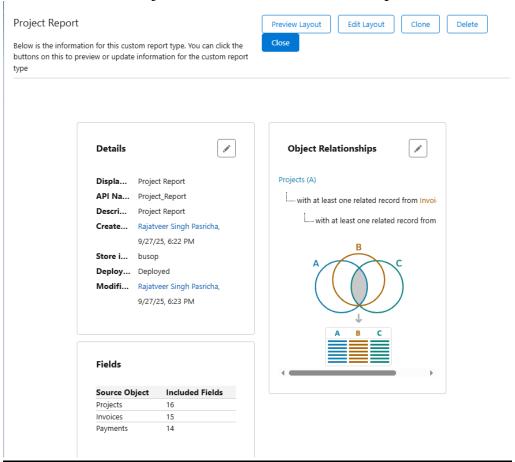
Salesforce reports let you analyze data.

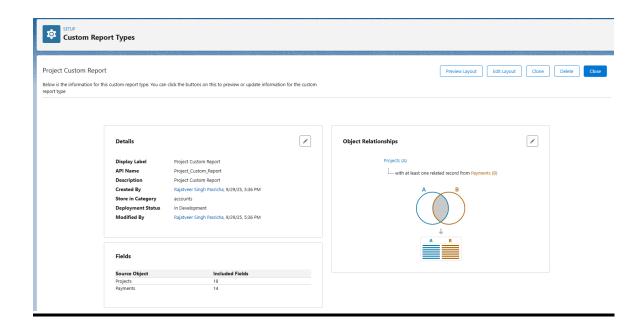




## **REPORT TYPES:**

Determines what objects/fields are available in a report.

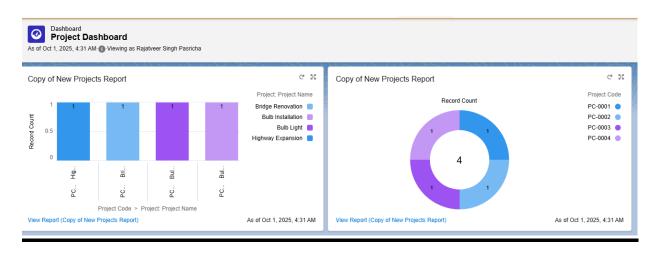




## **DASHBOARDS:**

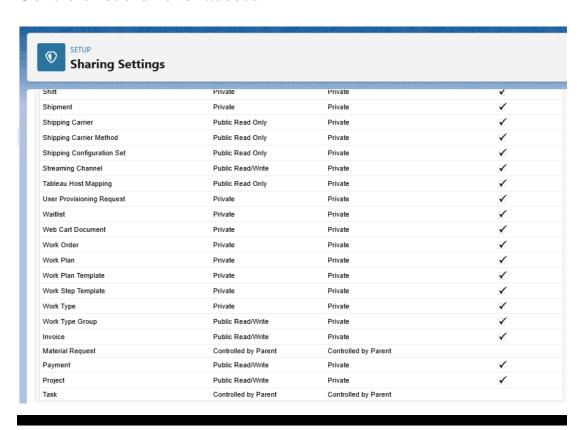
Visual display of reports.





## **SHARING SETTINGS:**

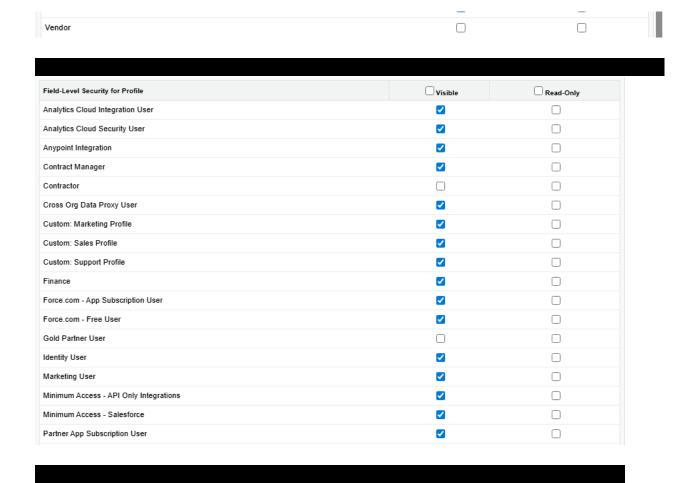
Controls record-level access.



## **FIELD LEVEL SECURITY:**

Controls who can see/edit a specific field.

Field-Level Security for Profile	✓ Visible	Read-Only
Analytics Cloud Integration User	<b>~</b>	
Analytics Cloud Security User		
Anypoint Integration		
Contract Manager	<b>~</b>	
Contractor		



## **SESSION SETTINGS:**

Controls login/session security (timeouts, 2FA, IP).



#### **LOGIN IP RANGES:**

Restrict user logins by IP.



## **AUDIT TRAIL:**

Tracks changes to setup/configurations.

