

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 8: Data Management & Deployment

DATA IMPORT WIZARD:

The screenshot displays the Salesforce Data Import Wizard interface, which is divided into three main sections: "What kind of data are you importing?", "What do you want to do?", and "Where is your data located?".

- What kind of data are you importing?:** This section has two tabs: "Standard objects" and "Custom objects". Under "Standard objects", "Accounts and Contacts" is selected and marked with a green checkmark. Other options include "Leads", "Solutions", and "Campaign Members".
- What do you want to do?:** This section is divided into two main options: "Add new records" (selected) and "Update existing records". Under "Add new records", there are fields for "Match Contact by:" (set to "Name"), "Match Account by:" (set to "Name & Site"), and "Which Contact field in your file do you want to match against to set the Account: Primary Contact lookup field?" (set to "Contact Name"). There are also checkboxes for "Trigger workflow rules and processes?" (checked) and "Assign All Contacts to Campaigns?" (checked).
- Where is your data located?:** This section has a heading "Drag CSV file here to upload". Below this, there are options for "CSV", "Outlook CSV", "ACT! CSV", and "GMail CSV". The "CSV" option is selected, and a file named "Accounts (1).csv" is shown with a green checkmark. The "Character Code" is set to "ISO 8859-1 (General US & Western European, ISO-LATIN-1)" and the "Values Separated By" is set to "Comma".

At the bottom of the wizard, there are buttons for "Cancel", "Previous", and "Next".

[Setup](#)
[Home](#)
[Object Manager](#)

Getting closer

Choose data

Edit mapping

Start import

Import your Data into Salesforce

You can import up to 50,000 records at a time.

[Help for this page](#)

What kind of data are you importing?

Standard objects

Custom objects

Invoices

Material Requests

Payments

Projects

Tasks

What do you want to do?

Add new records

Match by:

-None-

Which User field in your file designates record owners?

-None-

Which Account field in your file do you want to match against to set the Account lookup field?

-None-

Which User field in your file do you want to match against to set the Project Manager lookup field?

-None-

Trigger workflow rules and processes?

☐ Trigger workflow rules and processes for new and updated records

Record type

Maintenance Project

Update existing records

Where is your data located?

Drag CSV file here to upload

CSV

File

Choose File

Project.csv

Character Code

ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Values Separated By

Comma

Cancel

Previous

Next

DUPLICATE RULES:

SETUP

Duplicate Rules

Account Duplicate Rule

Same Account

[Help for this Page](#)

Duplicate Rule Detail

Edit

Delete

Clone

Activate

Rule Name	Same Account	Order	2 of 2	Reorder	i
Description					
Object	Account				
Record-Level Security	Enforce sharing rules				
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert	<input checked="" type="checkbox"/> Report	
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert	<input type="checkbox"/> Report	
Alert Text	Use one of these records?				
Active	<input type="checkbox"/>				
Matching Rule	<input checked="" type="checkbox"/> Standard Account Matching Rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Matching rule for account records. More info		
Conditions	Account: Account Name EQUALS null				
Created By	Rajatveer Singh Pasricha , 27/09/2025, 5:20 pm	Modified By	Rajatveer Singh Pasricha , 27/09/2025, 5:20 pm		

Edit

Delete

Clone


Activate

DATA EXPORT AND BACKUP:

Monthly Export Service

[Help for this Page](#)

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

 **Next scheduled export:**
A data export is currently in progress for your organization.

[Export Now](#) [Schedule Export](#)

Your export has been queued. You will receive an email notification when it is completed.

Scheduled By	Rajatveer Singh Pasricha
Schedule Date	27/09/2025
Export File Encoding	ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Here I have done steps which are essential for initial phases of the project. I'll do further integration in the advance stages of projects.