

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.

Company Information

SiteSync

Help for this Page

The organization's profile is below.

User Licenses (10+)

Permission Set Licenses (10+)

Feature Licenses (11)

Usage-based Entitlements (10+)

Organization Detail

Edit

Deactivate Org

Organization Name	SiteSync	Phone	
Primary Contact	Rajivveer Singh Pasricha	Fax	
Division		Default Locale	English (India)
Address	IN	Default Language	English
Fiscal Year Starts In	April	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	116 KB (2%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	13 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DANS000000c2Y1m
		Organization Edition	Developer Edition
		Instance	IND56

Created By

Rajivveer Singh Pasricha, 18/09/2025, 9:56 am

Modified By

Rajivveer Singh Pasricha, 24/09/2025, 3:32 am

Edit

Deactivate Org

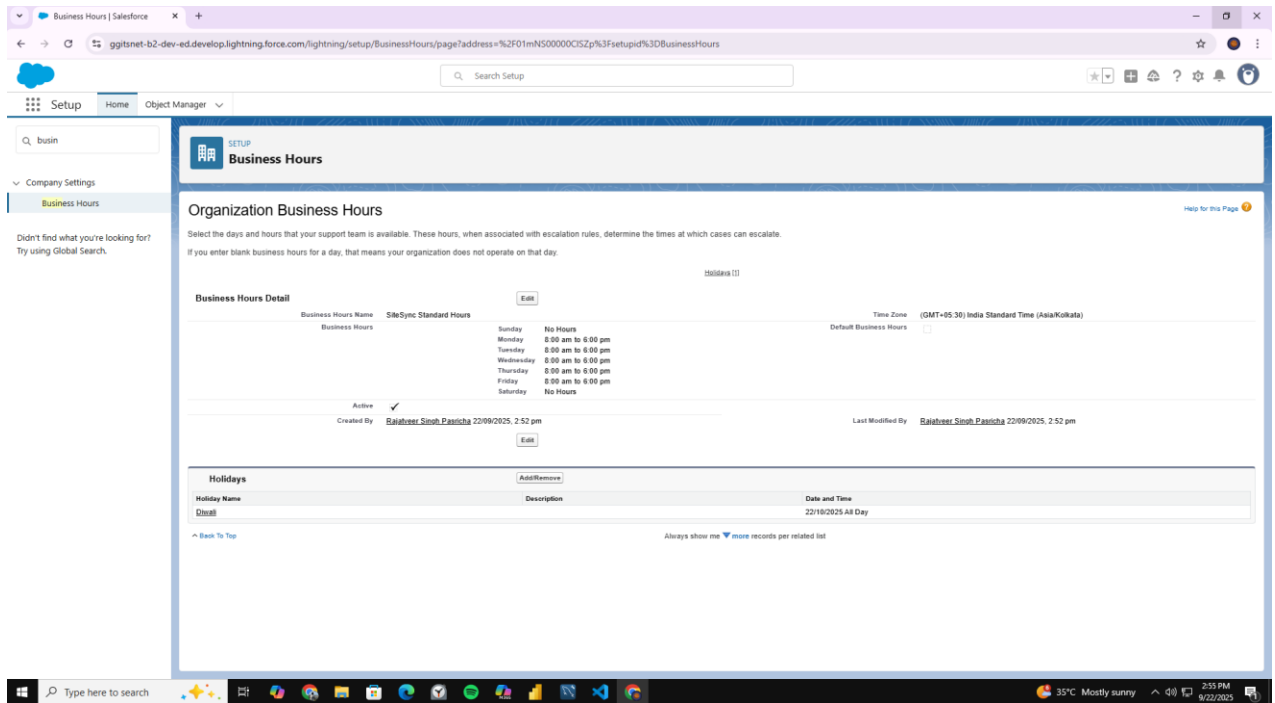
User Licenses

User Licenses Help

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	2	2	0	
Chatter Free	Active	5,000	4	4,996	
Analytics Cloud Integration User	Active	2	2	0	
External Apps Login	Active	20	0	20	
Salesforce Integration	Active	1	0	1	
Salesforce Platform	Active	3	3	0	

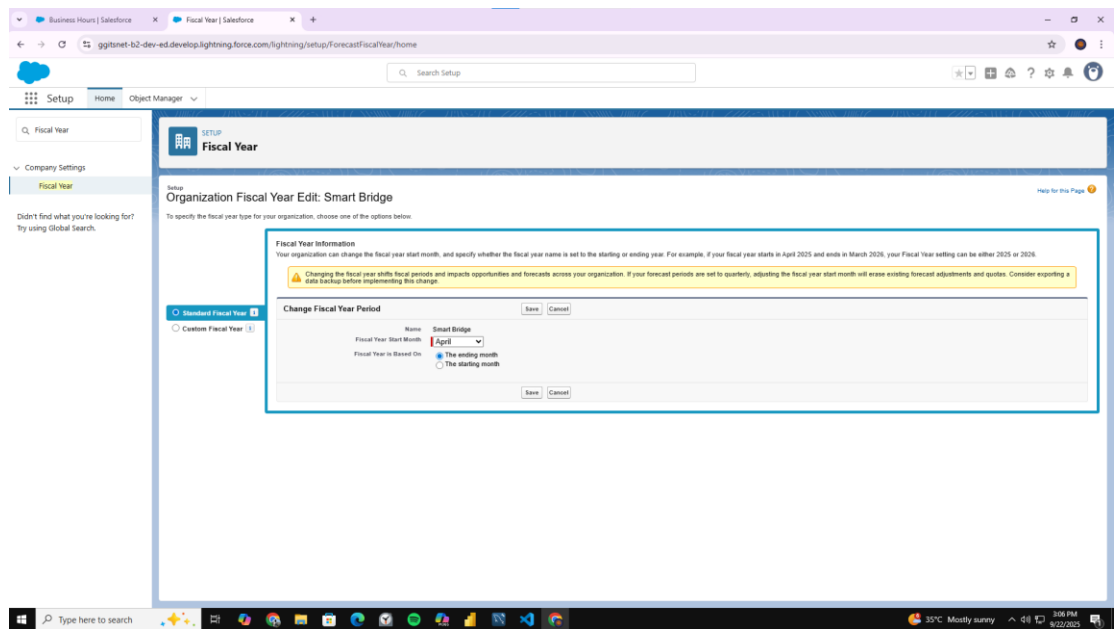
2. Business Hours & Holidays

- **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**

User

Rahul Kumar

[Permission Set Assignments \(0\)](#)

[Permission Set Assignments: Activation Required \(0\)](#)

[Permission Set Group Assignments \(0\)](#)

[Permission Set License Assignments \(0\)](#)

[Personal Groups \(0\)](#)

[Public Group Membership \(0\)](#)

[Queue Membership \(0\)](#)

[Team \(0\)](#)

[Managers in the Role](#)

[Third-Party Account Links \(0\)](#)

[Built-in Authenticators \(0\)](#)

[Installed Mobile Apps \(0\)](#)

[Authentication Settings for External Systems \(0\)](#)

[Login History \(0+\)](#)

[User Provisioning Accounts \(0\)](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Rahul Kumar	Role	Finance Officer
Alias	rkuma	User License	Salesforce Platform
Email	rahulkumar123@gmail.com (Verify) i	Profile	Standard Platform User
Username	rahul_kumar123@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User1758551519833612740 i	Marketing User	<input type="checkbox"/>

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Maya Kumari	Role	Vendor Manager
Alias	mkuma	User License	Salesforce Platform
Email	m_kumari@gmail.com (Verify) i	Profile	Standard Platform User
Username	m_kumari11@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17585535497225164112 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>

User Detail		Edit Sharing Reset Password Freeze View Summary	
Name	Sumit Shah	Role	Project Manager
Alias	sshah	User License	Salesforce Platform
Email	sumit1234@gmail.com (Verify) i	Profile	Standard Platform User
Username	sumit_shah@ggits.net	Active	<input checked="" type="checkbox"/>
Nickname	User17585505275199675476 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
		Marketing User	<input type="checkbox"/>

User Detail		Edit Sharing Reset Password Freeze View Summary	
Name	Sahil Shukla	Role	Contractor
Alias	sshuk	User License	Salesforce
Email	sahil111@gmail.com (Verify) i	Profile	Contractor
Username	sahil_123@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User1758555542115048906 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>

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.

Sharing Settings

Help for this Page

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

One or more sharing operations has been initiated. See below for additional details. Certain operations may not be available.

Manage sharing settings for:

Project

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults

Edit

Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Project	Public Read/Write	Private	✓

Other Settings

Other Settings Help

Manager Groups

Secure guest user record access

Require permission to view record names in lookup fields

Sharing Rules

Project Sharing Rules

New

Recalculate

Project Sharing Rules Help

A sharing rule operation is in progress. You can't create new owner-based sharing rules for Projects targeting the following groups. The initiating user will receive an email when each operation finishes.

Initiated By	Shared With	Initiated On
Rajatveer Singh Pasricha	Role: Project Manager	24/09/2025, 3:37 am

Action	Criteria	Shared With	Access Level
<div>Edit</div> <div>Del</div>	Owner in Role: Head of Projects	Role: Project Manager	Read/Write

Sharing Settings

Help for this Page

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for:

Accounts

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults

Edit

Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Account and Contract	Private	Private	✓

Other Settings

Other Settings Help

Manager Groups

Secure guest user record access

Require permission to view record names in lookup fields

Sharing Rules

Account Sharing Rules

New

Recalculate

Account Sharing Rules Help

Action	Criteria	Shared With	Account and Contract	Contact	Opportunity	Case
<div>Edit</div> <div>Del</div>	Account: Account.TextName EQUALS Vendor	Role: Vendors	Read/Write	Read/Write	Read/Write	Read/Write

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)

[...](#) > [PERMISSION SET 'REPORT ACCESS FOR CONTRACTORS'](#) > [MANAGE ASSIGNMENTS](#)

Report Access for Contractors

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Sahil Shukla	Salesforce Platform			Success

[...](#) > [PERMISSION SET 'PAYMENT & INVOICE ACCESS'](#) > [MANAGE ASSIGNMENTS](#)

Payment & Invoice Access

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Sumit Shah	Salesforce			Success

[...](#) > [SETUP](#) > [PERMISSION SET 'PROJECT MANAGER EXTRA ACCESS'](#)

Project Manager Extra Access

Current Assignments [Add Assignment](#)

<input type="checkbox"/> Full Name ↑	Active	Role	Profile	User License	Expires On
<input type="checkbox"/> Rahul Kumar	✓	Project Manager	Standard Platform User	Salesforce Platform	

8.Login Access Policies

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

Login Access Policies

Help for this Page

Control which support organizations your users can grant login access to.

Changes Saved

Manage Support Options

SaveCancel

Setting	Enabled		
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>		
Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>

SaveCancel