

Neilon Project Management Deployment Guide

Introduction

The Neilon Project Management application will allow customers to create and manage jobs/audits/projects. Add various services for the jobs/audits/projects. Add stakeholders who will be working on the jobs/audits/projects. Create and manage invoices for the jobs/audits/projects.

The Neilon Project Management application is available as a managed package that can be installed on an existing Salesforce installation.

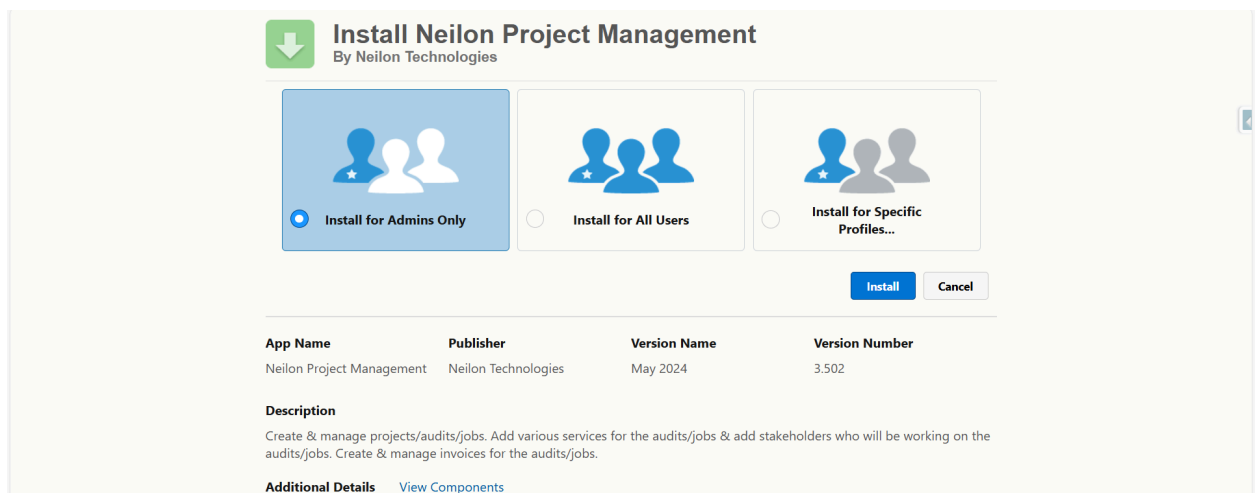
Mandatory Deployment Steps

Execute the below mandatory deployment steps with the new Salesforce installation.

1. Install the Neilon Project Management package

The Neilon Project Management application can be installed as a managed package in an existing Salesforce installation. Salesforce provides a single-step installation. Follow the below steps to start the Neilon Project Management installation.

1. Click on the URL provided by the Neilon team and log in to the org in which you want to install the package or you can visit and install it from [here](#) at Salesforce AppExchange
2. Select the option **Install for Admins Only**



The screenshot shows the 'Install Neilon Project Management' page on the Salesforce AppExchange. At the top, there is a green download icon and the text 'Install Neilon Project Management By Neilon Technologies'. Below this, there are three installation options, each with a radio button and an icon of people:

- Install for Admins Only**: This option is selected with a blue radio button and a blue icon of two people.
- Install for All Users**: This option is unselected with a white radio button and a blue icon of three people.
- Install for Specific Profiles...**: This option is unselected with a white radio button and a grey icon of three people.

At the bottom right of the options, there are two buttons: 'Install' (in blue) and 'Cancel' (in grey). Below the options, there is a table with the following information:

App Name	Publisher	Version Name	Version Number
Neilon Project Management	Neilon Technologies	May 2024	3.502

Below the table, there is a 'Description' section with the text: 'Create & manage projects/audits/jobs. Add various services for the audits/jobs & add stakeholders who will be working on the audits/jobs. Create & manage invoices for the audits/jobs.' At the bottom, there are two links: 'Additional Details' and 'View Components'.

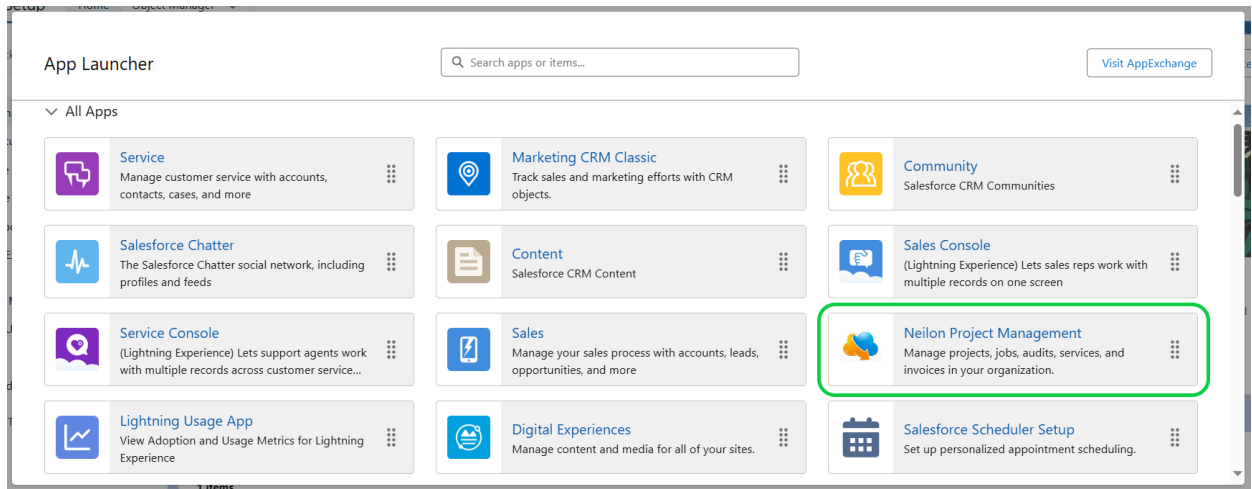
3. Click **Install**

The installation will take a few minutes to complete. Once the installation is finished, you will receive a confirmation email.

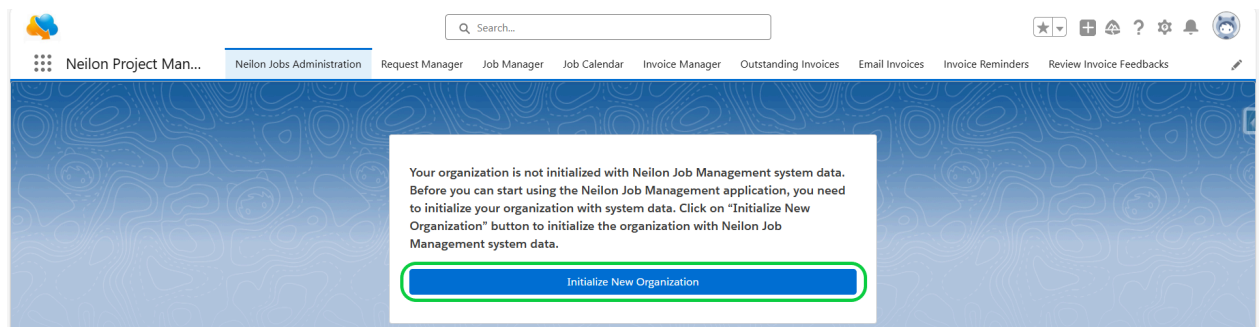
2. Initializing the application configuration

Once the Neilon Project Management package is installed, you have to initialize the application configuration.

1. Open **Neilon Project Management** from the App Launcher



2. Go to the **Neilon Jobs Administration** tab
3. Click the **Initialize New Organization** button



The application configuration is now initialized.

3. Assign permission sets to users

Follow the below steps to assign our permission set to your users.

1. Go to the **Neilon Jobs Administration** tab
2. Open **Neilon Jobs Access Management**

3. Click **Grant Access to All**

The screenshot shows the 'Nilon Jobs Access Management' page. The 'Grant Access to All' button is highlighted with a green rectangle. The page includes a search bar, navigation tabs, and a table of users with a search function.

Job Manager Users(1)

Keyword Search

FULL NAME	PROFILE ID	ACTIVE	ACTION
Admin User	System Administrator	✓	✕

4. Click **OK** in the confirmation

A batch job will be started to grant access to all the users

Optional Deployment Steps

Below are the **optional** deployment steps which you can skip as these are not mandatory and you can execute these steps later at any time.

After initializing the Neilon Project Management configuration, you can set up various system properties specific to each customer's environment.

1. Disable Duplicate Contacts Validation Rule

We have a setting where you can disable the duplicate contacts validation rule so that users can create contacts with the same name or email for the same account.

Ask the Neilon support team to send the guide **Neilon Project Management Disable Duplicate Contacts Validation** to disable the duplicate contacts validation rule.

2. Set Job# and Invoice# Prefix

We have a setting where you can set the prefix you want to use for the job number and invoice number.

Ask the Neilon support team to send the guide **Neilon Project Management Set Job and Invoice Prefix** to set the prefix.