

2. Projects: Use Cases

Use Case #1: Managing Different Websites

Projects can be used to manage different websites. For each website, you create a separate project, ensuring that only the managers and employees responsible for that specific site can see and interact with the customers associated with it. This setup helps to keep customer data segmented and relevant to the specific team.

Use Case #2: Managing Operations Across Different Countries

Projects can be utilized to manage operations in different countries. For each country in which your company operates, create a separate project (e.g., United States, Germany, Canada). This ensures that employees and managers of the respective offices only see and work with clients from their region, allowing for localized management and compliance with regional regulations.

Use Case #3: Managing Multiple Business Units

Projects can be used to separate different lines of business within your company. For example, if your company offers consulting services (business #1) and real estate (business #2), you can create two distinct projects. Each project operates in isolation, ensuring that employees from one business line do not have access to the clients and data of the other, maintaining confidentiality and focus.

Use Case #4: Feature Pilot & QA Environment

Spin up a “Staging” Project mirroring your production setup. QA engineers can safely test new features, import/export data, or preview integrations without impacting live operations.

Use Case #5: Integration Sandboxes

Stand up a Project solely for API integrations or partner onboarding. Provide external teams with API tokens scoped to this Project, ensuring any test calls cannot affect your real data.

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