

VendorConnect – Vendor & Purchase Order CRM

Phase 2 Completion Report

This document summarizes the completion status of Phase 2 of the VendorConnect project. Phase 2 focused on Salesforce Object Setup and Configuration for the Vendor and Purchase Order objects.

1. Objects Created

- ✓ Vendor_c (Custom Object)
- ✓ Purchase_Order_c (Custom Object)

2. Fields Configured

Vendor_c Fields: Vendor Rating, Compliance Status, Default Payment Terms, Total Spend, Internal Notes

Purchase_Order_c Fields: Amount, Status, Ordered Date, Expected Delivery Date

3. Page Layouts

Vendor Layout:

- Sections created: Vendor Details, Contact & Address, Financial, Internal
- Fields arranged as per design
- Related Lists prepared for Purchase Orders, Files/Notes

Purchase Order Layout:

- Fields placed logically
- Related list and lookup to Vendor configured

4. Profiles and Permissions

- ✓ Procurement, Finance, and Vendor access levels configured
- ✓ Field-Level Security (FLS) applied for sensitive fields

5. Quick Actions & Tabs

- ✓ Quick Actions: New Purchase Order, Log a Call, New Task
- ✓ Tabs created for Vendor and Purchase Orders and added to the VendorConnect App

6. Completion Status

- ✓ Phase 2 is completed successfully.

All objects, fields, layouts, tabs, and permissions have been set up as per the requirements. The system is now ready for Phase 3 (Data Modeling & Relationships).

7. Screenshots

Screenshots of the completed configurations (Object Manager, Fields, Page Layouts, Tabs, Quick Actions) should be inserted here before uploading to GitHub.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes the Salesforce logo, Setup, Home, and Object Manager. The main title is "Purchase Order". On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area is titled "Details" and contains sections for Description, API Name (Purchase_Order__c), Singular Label (Purchase Order), Plural Label (Purchase Orders), Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. At the bottom right are "Edit" and "Delete" buttons.

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The screenshot shows the Salesforce Setup interface for the Purchase Order object. The left sidebar is titled "Object Manager" and lists various layout types: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers. The "Page Layouts" section is currently selected. The main area is titled "Purchase Order Layout" and contains a "Fields" section with a "Quick Find" field named "Blank Space". Other fields listed include Approval Required, Last Modified By, Purchase Order Name, Completed PO Count, Ordered Date, Status, Amount, Created By, Owner, Approval Comments, Expected Delivery..., and PO Owner. Below the fields is a "Purchase Order Sample" section with a "Highlights Panel" and a "Quick Actions in the Salesforce Classic Publisher" section. A note states that actions are inherited from the global publisher layout. At the bottom, there is a "Salesforce Mobile and Lightning Experience Actions" section with a note about overriding predefined actions.

The screenshot shows the Salesforce Setup interface for "Custom Tabs". The left sidebar is titled "User Interface" and includes "Rename Tabs and Labels" and "Tabs". The main area is titled "CUSTOM TABS" and provides information on creating custom tabs to extend Salesforce functionality. It describes four types of tabs: Web Tabs, Visualforce Tabs, Lightning Component Tabs, and Lightning Page Tabs. A table titled "Custom Object Tabs" lists these categories with columns for Action, Label, Tab Style (with "Bridge" selected), and Description. The table shows that no tabs have been defined for any of these categories. At the bottom, a URL is visible: <https://reconfirm-3da1f7533-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home>.

Cloud icon

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Vendor

Buttons, Links, and Actions

9 Items, Sorted by Label

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Accept	Accept			Standard page	<input type="button" value="▼"/>
Clone	Clone			Standard page	<input type="button" value="▼"/>
Delete	Delete			Standard page	<input type="button" value="▼"/>
Edit	Edit			Standard page	<input type="button" value="▼"/>
List	List			Standard page	<input type="button" value="▼"/>
New	New			Standard page	<input type="button" value="▼"/>
New Purchase Order	New_Purchase_Order	Quick action to create a Purchase Order and prefill Vendor	Create a Record	Action Layout Editor	<input type="button" value="▼"/>
Vendors Tab	Tab			Standard page	<input type="button" value="▼"/>
View	View			Standard page	<input type="button" value="▼"/>

Quick Find New Action New Button or Link