

VendorConnect – Vendor & Purchase Order CRM

Problem Statement

Many businesses find it difficult to manage their vendor contracts and purchase orders efficiently. Duplicate vendor records are often created due to inconsistent data entry, especially when GST or Tax IDs are not validated. As a result, finance and operations teams waste time cleaning up vendor data. Missed purchase order renewals or delivery dates further disrupt operations and harm vendor relationships. To overcome these issues, VendorConnect aims to provide a Salesforce-based CRM solution that prevents duplicate vendors, automates purchase order tracking, sends timely reminders, and gives managers real-time visibility into procurement performance through dashboards.

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

Business Needs

- Prevent duplicate vendor records using GST/Tax ID validation.
- Send automated purchase order confirmation emails to vendors.
- Remind vendors about deliveries before the due date.
- Automatically close purchase orders once goods are received.
- Provide dashboards to track Pending vs Completed purchase orders.

Functional Requirements

- Validation rules to prevent duplicate vendors.
- Flow/Process automation to trigger PO confirmation emails.
- Scheduled reminders for delivery before due date.
- Auto-close functionality for POs upon goods receipt.
- Dashboard for procurement status tracking.

Non-Functional Requirements

- System must scale with growing number of vendors and POs.
- User-friendly interface for procurement and finance teams.
- Secure storage of vendor and financial data.

2. Stakeholder Analysis

- Procurement Team: Manage vendors, raise and track purchase orders.
- Finance Team: Validate vendor details and ensure compliance.

- Business Managers: Monitor dashboards for procurement insights.
- System Admin: Configure automations, validation rules, and maintain Salesforce org health.

3. Business Process Mapping

Current Manual Flow

- Vendor details entered manually without validation → leads to duplicates.
- Purchase orders drafted and sent manually via email.
- No automated reminders for vendors about delivery timelines.
- PO closure is tracked manually after goods receipt.

Proposed Automated Flow in Salesforce

- System validates GST/Tax ID when creating a vendor to prevent duplicates.
- PO is created in Salesforce and confirmation email sent automatically to vendor.
- Reminder email sent before delivery due date.
- System auto-closes PO once goods are marked as received.
- Dashboard updates to show Pending vs Completed POs.

4. Industry-Specific Use Case Analysis

- Manufacturing Firms: Manage multiple vendors and ensure timely deliveries.
- Retail Chains: Handle high volume of purchase orders with reduced manual errors.
- Service Companies: Maintain vendor contracts and avoid duplicate records.
- SMEs: Simplify procurement with automated reminders and dashboards.

5. AppExchange Exploration

- Conga Composer: For vendor contract templates.
- FinancialForce Procurement: For advanced procurement workflows.
- AppExchange Reminder Utilities: For automated email alerts.
- Decision: Use Salesforce-native automation (Flows, Validation Rules, Apex) to keep project simple and cost-effective.