

VendorConnect – Phase 3 Completion Report

This document provides the completion report for Phase 3: Data Modeling & Relationships of the VendorConnect – Vendor & Purchase Order CRM Salesforce project. It includes details of custom objects, fields, page layouts, related lists, and assignments. Screenshots should be inserted at the marked placeholders.

1. Custom Object Creation

Custom objects were created for Vendor and Purchase Order to manage procurement data.

- Object: Vendor__c
 - Label: Vendor
 - Plural: Vendors
 - Record Name: Vendor Name (Text)
 - Features Enabled: Allow Reports, Track Activities, Allow in Lightning Experience

[Insert Screenshot: Vendor Object Creation Screen]

- Object: Purchase_Order__c
 - Label: Purchase Order
 - Plural: Purchase Orders
 - Record Name: PO Number (Auto Number)
 - Features Enabled: Allow Reports, Track Activities, Allow in Lightning Experience

[Insert Screenshot: Purchase Order Object Creation Screen]

2. Custom Fields

The following custom fields were added:

Field Label	API Name	Data Type	Notes
Vendor Code	Vendor_Code__c	Text (10)	Unique vendor identifier
Compliance Status	Compliance_Status__c	Picklist	Values: Compliant, Non-Compliant, Under Review
Vendor Rating	Vendor_Rating__c	Number (3,1)	Vendor reliability rating (1.0–5.0)

Primary Contact	Primary_Contact__c	Lookup(Contact)	Linked contact for the vendor
GSTIN	GSTIN__c	Text (15)	Tax identification number
Default Payment Terms	Default_Payment_Terms__c	Picklist	Values: Net 15, Net 30, Net 45, Prepaid
Total Spend	Total_Spend__c	Currency(16,2)	Total amount spent on vendor
Internal Notes	Internal_Notes__c	Long Text Area(32768)	Internal use only

[Insert Screenshot: Vendor Custom Fields Screen]

3. Page Layouts & Sections

Vendor Layout was configured with the following sections:

- Vendor Details → Vendor Name, Vendor Code, Compliance Status, Vendor Rating
- Contact & Address → Primary Contact, GSTIN
- Financial → Default Payment Terms, Total Spend
- Internal → Internal Notes

[Insert Screenshot: Vendor Page Layout Screen]

4. Related Lists

Purchase Orders related list was added to Vendor Layout with columns: PO Number, Amount, Status, Ordered Date, Expected Delivery Date.

Files and Notes related lists were also added.

[Insert Screenshot: Vendor Related Lists Configuration]

5. Quick Actions

The following quick actions were added to the highlights panel:

- New Purchase Order (pre-populated with Vendor lookup)
- Log a Call
- New Task

[Insert Screenshot: Vendor Quick Actions Configuration]

6. Layout Assignment & Verification

- Vendor Layout was assigned to Procurement and Finance Profiles.
- Verification was performed by logging in as test users and ensuring correct sections, related lists, and quick actions were visible.
- Vendor Portal Profile was restricted via FLS for sensitive fields.

[Insert Screenshot: Page Layout Assignment Screen]