

## **VendorConnect – Phase 1 Completion Report**

This document provides the completion status of Phase 1: Problem Understanding & Industry Analysis for the Salesforce-based Vendor & Purchase Order CRM project.

### **Phase 1: Problem Understanding & Industry Analysis**

#### **1. Requirement Gathering**

- Collected business needs from procurement managers, finance team, and vendors.
- Key requirements:
  - Track vendors with ratings and compliance status.
  - Manage purchase orders efficiently.
  - Prevent duplicate or overlapping orders.
  - Generate expense and vendor performance reports.

#### **2. Stakeholder Analysis**

- Admin: Responsible for system setup and configuration.
- Procurement Officer: Creates and manages purchase orders.
- Manager: Approves high-value purchase orders and monitors reports.
- Vendor: Provides goods/services.

#### **3. Business Process Mapping**

Process Flow:

1. Request raised.
2. Vendor selection.
3. Purchase order created.
4. Approval required (if high value).
5. Notification sent to stakeholders.

#### **4. Industry-specific Use Case Analysis**

- In procurement industry, vendor reliability, pricing, compliance, and delivery timelines are critical.
- Need for a flexible system to adapt to organization-specific processes.

#### **5. AppExchange Exploration**

- Explored available vendor management apps on AppExchange.
- Decided to build a custom Salesforce solution to ensure flexibility and maximize learning.

### Completion Status

✅ Phase 1 completed successfully. Requirements, stakeholders, business processes, and use cases have been documented. AppExchange exploration was conducted, and decision was made to proceed with a custom solution.