# 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.