# 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.









