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]