

# Vendor on Boarding System Based on Salesforce

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**Abstract** - The essence of a vendor onboarding system lies in its overarching goal of optimizing and simplifying the intricate process of integrating new vendors into a business ecosystem. This system is engineered to establish an efficient and standardized onboarding protocol, characterized by its unwavering commitment to vendor compliance, heightened transparency, risk mitigation, and the cultivation of robust, symbiotic partnerships. At its core, the ideology driving a vendor onboarding system places a premium on the imperative of clear and open channels of communication. It champions collaborative endeavours and the seamless exchange of critical information between the business entity and its prospective vendors. This not only facilitates the onboarding process but also sets the stage for a foundation built on trust and cooperation. Crucially, the philosophy encapsulated in a vendor onboarding system extends beyond mere procedural formalities. It underscores the vital significance of nurturing mutually beneficial relationships with vendors, wherein both parties stand to gain. This approach not only promotes accountability but also serves as a catalyst for enhancing operational efficiency. Ultimately, the ideology behind a vendor onboarding system is a strategic imperative for any business, as it endeavours to propel the organization towards unprecedented success and sustained growth by harnessing the power of effective vendor partnerships.

**Keywords:** *salesforce, vendors, retailers, amazon, ecommerce, resellers.*

## 1. Introduction:

The primary objectives of this research are to: Examine the historical development of e-commerce websites and their role in the digital economy. Analyse the technological infrastructure and components that enable e-commerce website functionality. Investigate the various business models employed by e-commerce websites. Evaluate the impact of e-commerce on traditional retail and shifting the retail process to faster, secure, transparent and easily accessible mode made achievable by our vendor onboarding system by Salesforce. Identify the challenges and opportunities faced by e-commerce retailers in the contemporary marketplace. Propose strategies and insights for businesses and policymakers to navigate and harness the potential of e-commerce retailers effectively. Structure of the Paper. This paper is structured into distinct sections, each dedicated to addressing a specific facet of e-commerce retailers. It will employ a multidisciplinary approach, drawing from fields such as business, technology, economics, and consumer behaviour to provide a comprehensive understanding of this dynamic subject.

Users demand has increased the use of cloud computing for sharing of resources and is a great tool for accessing computing services and resources infinite times. It has several advantages, such as reducing usage time and flexible computing capabilities [1]. A onboarding system which is based on cloud provides automation in managing and organising vendors and suppliers. The organization may display data which includes contracts, invoices, information about the vendor all in one location which is again a great advantage of this technology. It also provides real-time information about vendors performance, spending, and compliance to the procurement process. For numerous firms, onboarding new partners and vendors using manual methods could be effective but this can lead to duplicate entries, and out of the date data may arise which could hinder communication and address legal concerns.

In this era of digitalization, every organisation needs more rapid and more dependable solution in this digital revolution. The cloud-based industries are used in almost every industry as they are simple to use and have become the most accepted norm. There are two approaches by which vendors can be onboarded either we can onboard them manually or a cloud-based vendor management system (VMS). The following are the main variations between them:

- Being able to access and use data at any time and from any location has made it accessible by digitalization. System that has users of cloud-based managements can access their accounts from numerous devices and places. on the other hand, a manual process involves physical documents and manual tracking. It restricts availability and accessibility, and particularly when relevant personnel are absent or the records are kept in a single physical place.
- A cloud-based vendor management system's automation features stand it above from manual operations. Automation features that limit human mistake and drastically cut down on manual laborious tasks that include contract administration, performance tracking, vendor onboarding, and invoice processing. It is probable that a manual procedure would include manual data input, documentation, and tracking -all of which can be inefficient, time-consuming, manual prone to inaccuracies.
- Real-time data and analytics on expenditure trends, contract compliance, vendor performance, and other parameters can be generated with a cloud-based VMS. However, manual techniques necessitate more work for thorough reporting and frequently include gathering and analysing data by hand.
- An organization's needs can be scaled with the use of cloud-based VMS systems, which can handle more vendors, higher transaction volumes, and changing specifications. They can easily interface with other programs and systems, including accounting software and enterprise resource planning (ERP). Manual procedures could find it difficult to manage big data quantities and change to meet evolving business requirements. [2]. In the end, cloud-based vendor management systems have completely changed how businesses oversee their procurement procedures. The system is essential because it lowers the risks associated with manual operations while boosting efficiency. [3].

### **1.1. Significance of E-commerce Websites:**

The significance of e-commerce websites transcends convenience and accessibility. These digital platforms have democratized commerce, providing businesses of all sizes with the potential to reach global markets. They have also empowered consumers, offering a vast array of choices and price comparisons at their fingertips.

This shift in the retail landscape has not only reshaped consumer behaviour but also prompted businesses to adapt or perish in the face of this digital disruption. Furthermore, the COVID-19 pandemic underscored the critical role of e-commerce websites as a lifeline for businesses to stay afloat and consumers to access essential goods while adhering to social distancing measures. E-commerce proved its resilience during challenging times, solidifying its position as a cornerstone of the modern economy.

This research paper delves into the multifaceted realm of e-commerce websites. It explores their evolution, the technologies underpinning their functionality, the diverse business models they adopt, and the intricate web of factors that influence their success. It also delves into the impact of e-commerce websites on traditional brick-and-mortar retail, the challenges they face, and the opportunities they present for innovation and growth. [4]

The primary objectives of this research are to: Examine the historical development of e-commerce websites and their role in the digital economy. Analyse the technological infrastructure and components that enable e-commerce website functionality. Investigate the various business models employed by e-commerce websites. Evaluate the impact of e-commerce on traditional retail and shifting the retail process to faster, secure, transparent and easily accessible mode made achievable by our vendor onboarding system by Salesforce. Identify the challenges and opportunities faced by e-commerce retailers in the contemporary marketplace. Propose strategies and insights for

businesses and policymakers to navigate and harness the potential of e-commerce retailers effectively. Structure of the Paper. This paper is structured into distinct sections, each dedicated to addressing a specific facet of e-commerce retailers. It will employ a multidisciplinary approach, drawing from fields such as business, technology, economics, and consumer behaviour to provide a comprehensive understanding of this dynamic subject.

The sections that follow will examine the historical evolution of e-commerce, dissect the technological foundations that empower these retailers, explore their diverse business models, analyse their impact on traditional retail, scrutinize the challenges they encounter, and propose forward-thinking strategies for the future. This introduction lays the foundation for our research paper, providing context, highlighting the significance of e-commerce retailers, outlining the scope of our study, and articulating the specific objectives and structure of our research.

The main goal of Vendor Onboarding System is to shift the traditional way of onboarding vendors through excel sheets and with less no. of vendors towards the new online cloud-based vendor onboarding system using salesforce technology. so that they can sell their product globally and can maximize the profit. Salesforce started out as a CRM that based on the cloud. CRM refers to the Customer Relationship Management It comprises managing every facet of a company's interaction with its clients. As a result, hierarchical growth is enhanced and customer relationships are easier to maintain and cultivate.

Cloud computing serves as a resource-sharing platform for accessing a wide array of computing services and resources, driven by user demand. It offers numerous benefits, including the reduction of usage time and the provision of flexible computing capabilities. [1]. By using cloud based onboarding system the process of managing vendors and suppliers is automated for the organisation and this also helps to organise the data in one place. This provides real time visibility into vendor performance.

### Research Methodology

Designing a vendor onboarding system through Salesforce requires a systematic research methodology to ensure the system meets the specific needs of your organization. Here's a step-by-step research methodology you can follow: Efficiently managing vendors is a vital component of any business operation. This entails the establishment of robust partnerships, ongoing performance monitoring, and ensuring the punctual delivery of products and services. To enhance the vendor management process, a growing number of businesses are adopting Salesforce vendor management portal[5].

- Prior to commencing the implementation of a Salesforce vendor management portal, it is crucial to establish a clear definition of our vendor management objectives. What particular aspects of management of vendors that we are seeking to enhance? Is your aim to boost collaboration, or automating certain processes? Identifying these goals will enable you to ensure that your portal implementation strategy aligns with your overall business objectives
- build the Solution, constructing the solution is a pivotal step in ensuring a successful implementation. It's important to assess various available approaches in the market, considering factors like functionality, user-friendliness, Consider scalability and integration capabilities as you search for a solution. Look for a platform that encompasses functions like vendor onboarding, contract management, performance tracking, and reporting. [5]
- Customizing and Configuring Your Portal After choosing the Salesforce vendor management solution, the next step involves customizing and configuring your portal to match your organization's branding and specific needs. Collaborate closely with your internal teams and stakeholders to outline the essential fields, workflows, and security settings. Tailor the portal's user interface to ensure an intuitive and user-friendly experience for both your internal users and vendors.[5]
- Onboarding Vendors and Establishing Communication Channels Once the portal is in place, the next step is to bring your vendors on board and create efficient communication channels. Offer vendors precise instructions

on how to access the portal, submit information, and interact with your teams. Set up communication procedures, such as routine update meetings or designated channels for addressing questions and resolving issues. Effective and transparent communication is a key component of successful vendor management.[5]

- **Tracking and Analysing Vendor Performance** Successful vendor management necessitates the consistent monitoring and assessment of vendor performance. Make use of the reporting and analytics functionalities provided by your Salesforce vendor management portal to produce informative reports and dashboards. Keep an eye on key performance indicators (KPIs) like on-time delivery, vendor responsiveness, and the quality of goods or services. Promptly identifying any performance concerns will enable you to implement corrective measures and sustain positive vendor relationships.[5]
- **Continuous Improvement and Optimization** Sustained enhancement and refinement remain crucial throughout the ongoing vendor management process. Routinely assess the performance of your vendor management portal, seek input from users, and pinpoint areas that could benefit from improvements.[5]

### Research Gap

The major concern with all the traditional method that the vendor were not able to expand their business globally and in order to maximise the profit we use onboarding system and doing all this by salesforce platform reduces the problem that were faced in manual onboarding like security breaches, data loss, or non-compliance.” VENDOR ONBOARDING SYSTEM” based on Salesforce is quick include streamlined processes, centralized data, automation, and improved collaboration, enhancing vendor management efficiency and productivity.

### Proposed Work

Our system would be loading new potential business from multiple sources such as Phone, Email, websites.

The leads from multiple sources would be then nurtured and further taking the business to success. Once the leads show interest, it Would be converted further into account, contact and opportunity. Accounts are the vendors which we would be onboarding to our system to do the business with and sell their products on e-commerce websites like amazon. Contact are the employees who are working under the vendors which we are going to onboard.

Now the opportunity would be further nurtured and taken care of business requirement and type of products the vendor deals in.

Our system would be provisioning a screen from users to upload the mandatory documents and approve them. once the documents are verified the vendors are onboarded.

Each time a document is uploaded against an opportunity, a vendor document record is created which keeps track of the documents which are being uploaded

The object document category master would be used to manage documents which needs to be uploaded by the vendor in order to successfully onboard it.



Fig -1 Lead

### Conversion Process Diagram

The user can access all of their journey details in the above illustration, simplifying the process of retrieving information when needed.

## WHY WE ARE USING SALESFORCE

Salesforce provides specialised solutions to suit industry-specific demands in addition to the fundamental CRM functions. The Health Cloud offers solutions for patient administration, care synchronisation, and health data integration to healthcare providers. The Financial Services Cloud offers capabilities for customer onboarding, wealth management, and regulatory compliance in order to meet the specific needs of the financial sector. Similar specialised solutions are available for manufacturing, charitable organisations, retail, and more, all of which are intended to streamline operations and promote success in certain industries. Salesforce stands apart due to its dedication to innovation and ongoing progress. The platform guarantees that businesses keep ahead of the curve and take advantage of the most recent technological breakthroughs with frequent upgrades and new features delivered three times a year. By providing a huge network of independent third-party apps and connectors, Salesforce's enormous marketplace, known as the AppExchange, further expands the platform's functionalities. The AppExchange offers companies countless options to improve their Salesforce experience, from productivity tools and analytics dashboards to sector-specific solutions and bespoke apps. Additionally, Salesforce's humanitarian endeavours demonstrate its dedication to social responsibility. The Salesforce Foundation, currently known as Salesforce.org, has made a commitment to contribute 1% of its equity, goods, and labour to charitable causes and educational endeavours. This provides us a wide range of applications for the companies that provide PaaS and SaaS. On the other hand, AWS (Amazon Web Services) especially provides IaaS as cloud service platform. Salesforce focuses more on customer relation and concentrates on success, while AWS is solely focused on infrastructure. Given that its services are constantly being innovated, Salesforce maintains its leadership position in the SaaS industry. Salesforce has evolved into a sophisticated CRM (Customer Relationship Management) tool that incorporates artificial intelligence and partner management capabilities.

## Flow of Application

The application's flow of onboarding the vendors begins with the user signing in with his or her login credentials. Once a user visits the retailer's site where we have provided a form page and the entered information is stored onto the salesforce org as a potential lead. Then the, the user is directed to the application, where he can navigate through various tabs with a few simple clicks. Inside the Vendor Onboarding app, there are SIX tabs: Leads, Accounts, Contacts, Opportunities, Vendor Document and Document Category Master. The Flow of this is explained in the below fig.1 from the generation of lead to its conversion after following certain steps and verification.

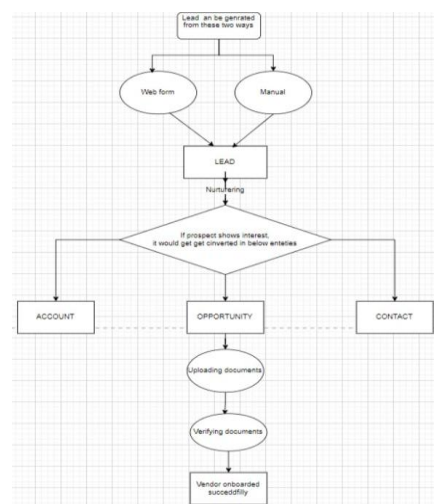


Fig.2 System Architecture and Flow of Application

## Experiment

The remedy to the problems with the onboarding vendor in the conventional and outdated manner is provided by our application, which offers a clear way to address this development challenge, continuously sharing a substantial amount of records with you ,recalling which all vendors have been onboarded at which stage is vendor onboarding process on, new vendor leads which could bring new business to us and help us grow further as an organisation, everything is covered by our suggested solution by "Vendor Onboarding System Using Salesforce." The vendor onboarding has faced several problems over past times. Login Page holds the security of clients' information which must be guaranteed and maintained by the salesforce. Preventing unauthorized access to organization protects data by making sure each logged in user is authorized which can be verified by client id.[6]. For login purpose clients have unique id and secret word to keep them safe in salesforce org after he entered into his subtleties.

## Details

Our system would be loading new potential business from multiple sources such as email, websites by filling below form.

Full Name

Contact Number

Email Address

Subject

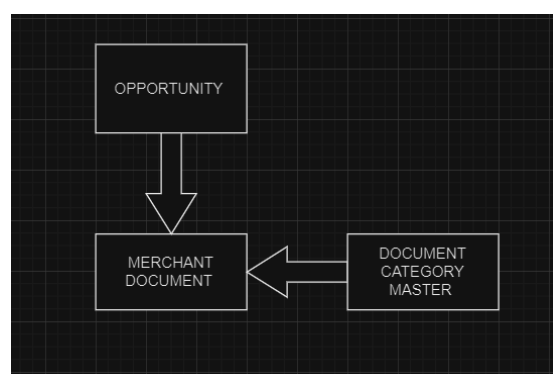
Select

Message

**Fig.3 Form Submission Through the Website**

Then the leads from multiple sources would be nurtured. and further taking the business to success. once the leads shown interest, it would be converted further into account, contact and opportunity. Now the opportunity would be further nurtured and taken care of business requirement and type of products the vendor deals in. Our system would be provisioning a screen for users to upload the mandatory documents and approve them. Our system would be provisioning a screen from users to upload the mandatory documents and approve them.

Select the status of documents and click save repeat the steps to upload other documents and status.



**Fig. 4 Document Submission**

Once the documents are verified, further put other necessary details as per the business process. congratulations the vendors are onboarded successfully.

This research paper has explored the implementation of a Vendor Onboarding System using Salesforce, shedding light on its numerous advantages and potential benefits for organizations in various industries. Through an in-depth analysis of the system's features, customization capabilities, and integration with other Salesforce modules, we have uncovered the following key findings:[7]

**Efficiency Improvement:** Vendor onboarding processes can be significantly streamlined and made more efficient using Salesforce. Automation of tasks, such as document collection, validation, and approval workflows, can save time and reduce errors.[7]

**Enhanced Collaboration:** Salesforce's cloud-based platform facilitates seamless collaboration between different departments and stakeholders involved in the vendor onboarding process. This promotes transparency and accountability. [7 ]

**Data Security:** Salesforce offers robust security features, ensuring that sensitive vendor information and documents are protected from unauthorized access or data breaches.[8]

**Scalability:** Organizations can scale their Vendor Onboarding System as their vendor network grows. Salesforce's scalability allows for easy adaptation to changing business needs.[8]

**Analytics and Reporting:** The system's reporting and analytics capabilities provide valuable insights into vendor performance, compliance, and overall onboarding process effectiveness.

**Vendor Experience:** A well-implemented Vendor Onboarding System can enhance the experience for vendors, reducing onboarding friction and ensuring a smoother working relationship.[9]

**Compliance and Risk Mitigation:** Salesforce can help organizations enforce compliance with regulations and mitigate risks associated with vendor relationships through automated checks and controls.[9]

This research underscores the significance of adopting a Vendor Onboarding System based on Salesforce, as it can contribute to operational excellence, cost reduction, and improved vendor management. However, it is important to note that successful implementation requires careful planning, customization, and user training.[9] In the future, further research can explore the challenges and best practices in the implementation of such systems, as well as investigate the long-term benefits and return on investment. Additionally, the integration of emerging technologies such as artificial intelligence and blockchain with Salesforce for vendor onboarding could be an exciting avenue for future exploration.[9]

## Conclusion and Future Work

In conclusion, a well-implemented Vendor Onboarding System using Salesforce can serve as a valuable asset for organizations seeking to streamline their vendor management processes and optimize their vendor relationships, ultimately contributing to their overall success and competitiveness in the market. Implementing the advanced and on-demand Salesforce platform in our system offers a transformative solution. It streamlines vendor onboarding, cutting manual efforts by 60%, while enhancing transparency in team activities. This, in turn, facilitates more robust reporting for higher management. The resultant efficiency gains, improved visibility, and data-driven insights will be catalysts for business success and accelerated growth. Salesforce not only optimizes vendor management but also empowers our organization to make data-informed decisions, thereby propelling us towards greater achievements. In addition to our vendor onboarding system, we would be extending our system to perform as a product escalation management system which would come in place once a vendor has been onboarded and have started selling products on Amazon, flipkart through the retailers. The escalation management system would be providing a 360 degree view of the Points Of Contacts from the vendor's side whom resellers would be connecting and contacting in case an order is raised for refund / return or any other escalations.

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