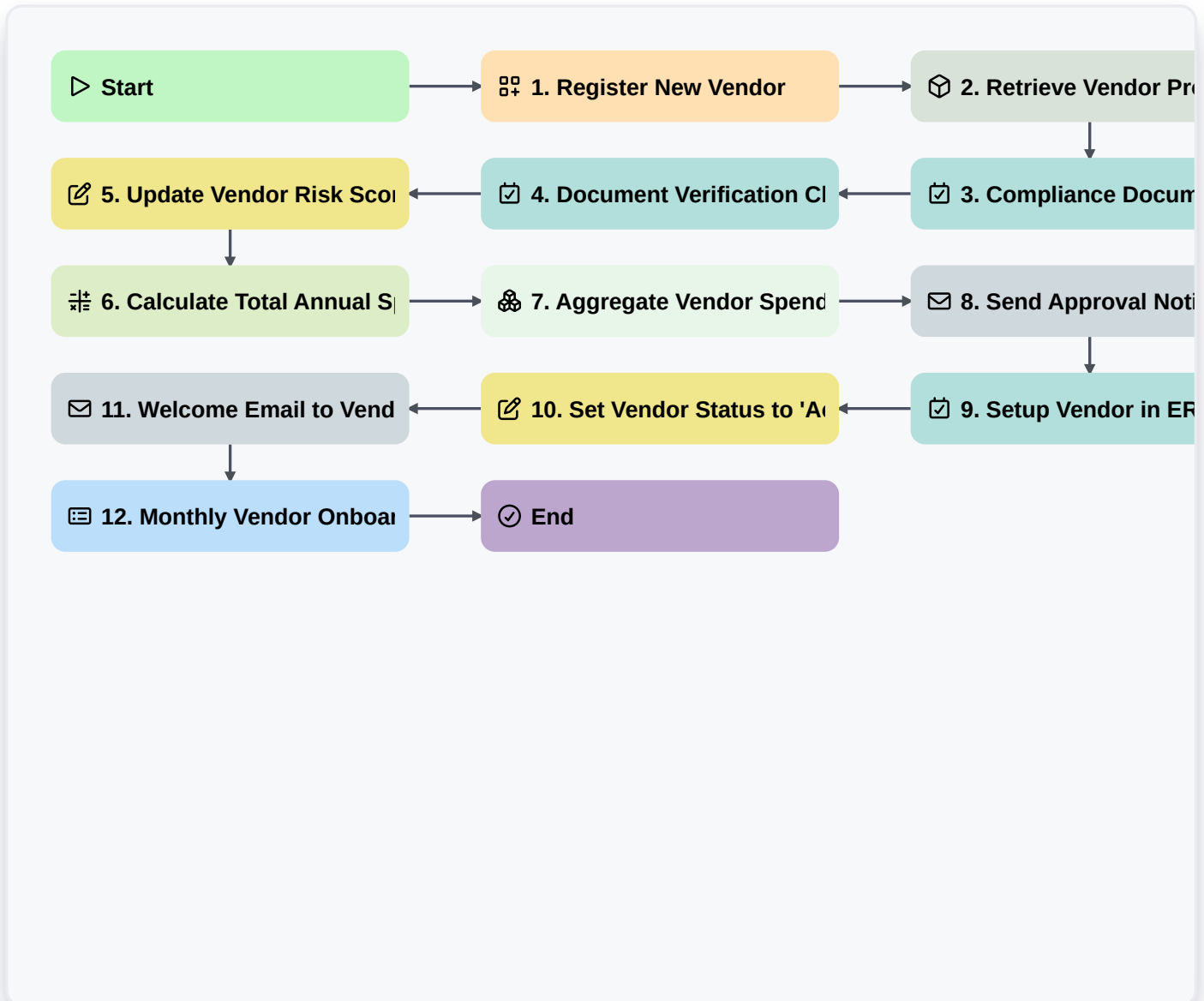


Supplier Onboarding & Vendor Management Workflow



▶ Start

Start of the Workflow/Process.

🗄️ 1. Register New Vendor

Create a new entry in the 'Vendors' Data Model with initial contact and company details.

📦 2. Retrieve Vendor Profile

Fetch existing vendor details and tax identification information from the Vendors Data Model.

📋 3. Compliance Document Review

Create a task for the Legal/Compliance team to verify uploaded certifications and insurance documents.

📋 4. Document Verification Checklist

A sub-set of tasks within the Compliance Review to check W-9, ISO Certifications, and NDA signatures.

📝 5. Update Vendor Risk Score

Update the 'Risk Rating' field in the Vendor Data Model based on the results of the compliance audit.



⚙️ 6. Calculate Total Annual Spend Potential

Execute a formula summing projected contract values to determine the vendor's importance tier.

🔗 7. Aggregate Vendor Spend

Sum all 'Purchase Order' entries linked to the specific Vendor to calculate total historical spend.

✉️ 8. Send Approval Notification

Send an email to the Procurement Manager notifying them that the vendor has passed the initial screening.

📅 9. Setup Vendor in ERP

Create a task for the Finance Department to enter the approved vendor into the accounting system.

✍️ 10. Set Vendor Status to 'Active'

Update the status field in the Vendor Data Model from 'Pending' to 'Active' once all tasks are complete.

✉️ 11. Welcome Email to Vendor

Send an automated email to the vendor contact with onboarding instructions and portal login details.

📄 12. Monthly Vendor Onboarding Report

Generate a report summarizing all new vendors onboarded and their average onboarding duration during the month.

🏁 End

End of the Workflow/Process.