



VENDOR ONBOARDING CHECKLIST & TEMPLATES

In this file, you'll find the following documents you'll need for vendor onboarding:

- Onboarding Checklist
- Vendor Registration Form
- Credit Card Acceptance Form
- ACH/Direct Deposit Authorization Form

ONBOARDING CHECKLIST

Before Onboarding

- Assign onboarding specialist or business representative
- Create onboarding plan
 - Create slide decks for vendor onboarding, if necessary
 - Prepare onboarding packet, if necessary. The packet must include the following:
 - Welcome letter
 - Vendor registration form
 - Credit card acceptance form
 - Vendor ACH/Direct Deposit Authorization Form
 - Legal Documents
 - Others (specify):
 - Others (specify):
 - Others (specify):
- Schedule onboarding date
 - For **VIRTUAL** onboarding
 - Send calendar invite to the vendor representative including the meeting link
 - Send additional calendar invites to employees who need to be present during the onboarding
 - For **IN-OFFICE** onboarding
 - Contact vendor representative to schedule time, date, and place of onboarding
 - Provide the following information to the vendor:
 - Food options
 - Parking information
 - Required dress code
 - Book the meeting place for the onboarding. If not needed, skip this step.

During Onboarding

- Orient vendor about your business processes
 - Discuss contract bidding process
 - Discuss how to process proposals, quotes, and estimates

- Discuss the purchasing process
- Discuss expectations in delivery or performance time
- Discuss payment modes and methods
- Discuss returns and refunds policies
- Ask the vendor to orient you about their business and overall ordering process
- Discuss the following documents with the vendor:
 - Service level agreements
 - Certificate of insurance
 - Business licenses and permits (enumerate below):
 - Specify:
 - Specify:
 - Specify:
 - Form W-9 and Employee Identification Number
 - Credit report
 - Certificate of good standing
 - Mutual non-disclosure agreement or confidentiality agreement
 - Data processing, privacy and retention agreements
 - Others (Specify):
 - Others (Specify):
 - Others (Specify):

After Onboarding

- Set-up vendor account
 - Enroll vendor in your accounting and vendor management system
 - Provide access to vendor in your vendor management system
 - Enroll vendor in your 1099 payments tracker, if any
- Set deadline to collect required documents from vendor
 - Follow up documents from vendor
 - Check if vendor signed off on documents that need a signature
- Check in with vendor after (x) number of days/weeks after onboarding

VENDOR REGISTRATION FORM

VENDOR DETAILS

COMPANY NAME or FIRM NAME as shown in the Federal Tax Return

ALTERNATE NAME if applicable (doing business as)

VENDOR ADDRESS

BILLING ADDRESS (leave blank if same as vendor address)

EMPLOYEE IDENTIFICATION NUMBER for businesses or SOCIAL SECURITY NUMBER for individuals

CONTACT PERSON

TITLE/POSITION

PHONE

PHONE

EMAIL ADDRESS

ORGANIZATION TYPE

- | | |
|---------------------------------------|--|
| <input type="radio"/> Corporation | <input type="radio"/> Joint Venture |
| <input type="radio"/> LLC | <input type="radio"/> Nonprofit |
| <input type="radio"/> Sole Proprietor | <input type="radio"/> Government |
| <input type="radio"/> Partnership | <input type="radio"/> Independent Contractor |

PREFERRED PAYMENT METHOD

- Cash/Check Debit Card Credit Card ACH

For debit card, credit card, and ACH, fill out additional authorizations included in the onboarding packet.

VENDOR PRODUCTS

What kind of products or services that the vendor offers?

For Internal Use Only

Assigned Vendor ID No.:
Onboarding Officer/Staff
Date of Onboarding:

Remarks:

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DOWNLOADABLE FILES:

- Credit Card Acceptance Form
- ACH/Direct Deposit Authorization Form

Don't forget to improve these templates to match your business needs and processes. These files are accessible via Google Docs.