



A Template for Documenting Procedures for Supplier Onboarding and Change Management

Use this template to audit your own vendor management processes with your team and other departments. Afterwards, you'll be able to have a productive conversation about what's working, what's putting you at risk, any missed revenue opportunities, and tangible ways you can make your vendor management more efficient, secure, and profitable.

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Part One: New Vendor Onboarding Documentation

Roles and responsibilities

Define and establish the roles and responsibilities for positions responsible for collection, verification, and inputting of vendor master data into your financial system.

Role	Responsibility	Assigned to <last updated, name>

Tools for collecting vendor information

Inventory all tools and platforms used to collect and verify vendor data.

Tool	Deliverable	Business Owner

Required data to onboard

Document all data required to onboard a new vendor.

Field Name	Vendor Type e.g., EIN, SSN, ALL
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Optional data to onboard

Outline optional data, and what triggers collection of the data.

Data	Trigger

Process for data collection, approval workflows, and tracking

Onboarding Process Steps	Department Responsible	Position Responsible

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Part Two: Existing Vendor Change Management Documentation

Required data to change existing record

Document all data required to change an existing vendor record in the ERP.

Field Name	Vendor Type <i>e.g., EIN, SSN, ALL</i>

Optional data to onboard

Outline optional data, and what triggers collection of the data.

Data	Trigger

Process for data collection, approval workflows, and tracking

Onboarding Process Steps	Department Responsible	Position Responsible

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Part Three: Audit Process Documentation

Process Item	Business Owner	Audit Owner	Timing

PaymentWorks

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PaymentWorks, Inc.
Version 1.0
07/03/23

