

WWRGD Vendor Onboarding Workflow

WWRGD Vendor Onboarding Process Workflow

End-to-End Vendor Onboarding – Visual Process Flow | WWRGD Operations & Vendor Management | April 2025

1 Intake Form Submission

Vendor request submitted via email intake form

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2 Smartsheet Log – Initial Entry

Request logged in Smartsheet for tracking

¼

3 Insurance Verification

Vendor insurance documentation collected and verified

¼

4 WF SOA Review

Wells Fargo Statement of Applicability reviewed

¼

5 Legal Documentation (CC·NDA·MSA·Prime/AIA)

Legal agreements executed

¼

6 Workday Setup

Vendor profile entered into Workday

¼

7 Coupa Setup

Vendor configured in Coupa procurement platform

¼

8 Procore Setup

Vendor access provisioned in Procore

¼

9 Amazon Payee Central – Coupa Integration

Payment processing configured

¼

10 Smartsheet Log – Final Update

Completion logged; vendor confirmed as fully onboarded

LEGEND

% Blue – Intake & Tracking

% Green – Compliance & Legal

% Orange – System Configuration

% Purple – Payment Integration

KEY SYSTEMS: Smartsheet | Workday | Coupa | Procore | Amazon Payee Central

& All steps are mandatory and sequential. No step may be bypassed without written approval from the Operations & Vendor Management Office.