

**VendOnBoard**  
ONBOARD VENDORS WITH EASE

# **VENDOR USER DOCUMENTATION**

## Getting Started

Welcome to the VendOnBoard (VOB) vendor onboarding system! This quick start guide walks you through getting started with your VOB account, including essential steps like adding a vendor contact, how to upload required documents and certifications, and getting approved in the system. Now, let's get started!

The VOB system allows company's to provide vendors and subcontractors with a common structure to submit required documents via a white labeled platform, workflow management, signature notification and transaction management.

Once you submit your necessary documents to complete your vendor profile, the company will review each form and someone within the company can approve it electronically. Typically, this is done within 48-72 hours after submittal. This streamlined process allows you to begin working and invoicing earlier and allows our company to manage vendors with a faster authorization time.

## Document Expirations

Once you become an approved VOB Vendor is in the system, you will be sent an email reminding you to upload the required forms, which we will mention in further detail below. If you fail to upload any of the required forms, you will be sent monthly reminders that your vendor profile is incomplete and you will be ineligible to receive purchase orders from us.

Of the required documents, the Certificate of Liability Insurance (COLI) and Annual Supplier Representation and Certification (ASRC) are required to be updated annually from the date of initial approval by your company. If the documents pass their annual approval date without being updated, you will begin to receive monthly reminders that they have expired.

## Vendor Document Requirements

If you have recently completed a Purchase Order and/or a Subcontract Agreement with your company, these documents are required to be submitted:

- **Form W-9:** A request for Taxpayer Identification Number and Certification.
- **Annual Representations and Certifications (ASRC):** This online form is required to comply with audit requirements and government requests for information regarding both the character and nature of our Vendors and/or Subcontractors. Additionally, this form helps us build a database of information for potential new projects.
- **Certificate of Liability and Insurance (COLI):** This uploadable form is required to show that a firm or corporation maintains the proper, minimum insurance coverage. The minimums are as follows:
  - Comprehensive General Liability: at least \$2 Million in aggregate.
  - Comprehensive Automobile Liability (Owned, Non-Owned, Hired): at least \$1 Million in aggregate.
  - Professional Liability: at least \$1 Million
  - Workers' Compensation: in the statutory limits.

- There is an option for you to submit your DCAA/DCMA information if you have an approved accounting system, purchasing system, or other system under the new business systems rules.
- There is a tab to upload and store other relevant documents between us such as NDAs, Teaming Agreements, Subcontracts etc...

## Adding a Vendor Contact

When you onto you Vendor profile, you need to add at least one Vendor contact. This contact will act as the point person for all email correspondence and document submission, and can be themselves, or any employee affiliated with your corporation. Since this contact will potentially be uploading sensitive legal information, it is best you use a trusted employee that will have access to these documents. Additionally, this contact will receive all follow up, security, and informational emails to their email address.

You may assign more than one contact into VendOnBoard, as long as they have differing email addresses. However, any contact uploaded will receive all correspondence, which includes monthly document expiration emails.

## Waivers

Please note that certain Vendors/Subcontractors may be eligible for a Certificate of Liability Insurance (COLI) waiver. This waiver is primarily for independent contractors acting as an individual subject matter expert, analyst, or small business owner whose insurance doesn't cover any of the basic COLI minimum requirements.

## Updating Documents

Certain vendor documents will need to be updated yearly. Built into VOB we have established reminders to be sent to you to inform you of when their documents and certifications are expiring. When the notices are sent out is outlined below:

- **Form W-9:** A W-9 is effective from the date of initial signature. These do not expire unless the vendor wishes to update their payee information (i.e. if they initially sign up as a individual, but now would like to start being paid as a corporation).
- **Annual Supplier Representation and Certification (ASRC):** An annual notification that an ASRC's have become expired. You will need to log into you profile and reapprove the electronic signature. At this time, you will be able to make any necessary changes to your information.
- **Certificate of Liability Insurance (COLI):** Thirty (30), sixty (60), and ninety (90) day reminders prior to each annual expiration that you certificate is in danger of becoming expired will be sent to the vendor contact on file. The constant reminders will provide you with enough time to request the COLI from the proper channels.

## **Rejections**

Although vendor form rejections are very rare, it is possible to reject one (1) or more of the documents a vendor has submitted. There are a few cases where a document can be rejected, such as a form being filled out incorrectly, or a form not meeting the minimum requirements.

You will receive an automated email alerting them that a document has been rejected, it will state the reason for rejection, and offer contact to get in touch with if you have any questions or concerns.

At this point, you will be able to resubmit any rejected documents via their VOB vendor portal. Your employee will be notified of their action and will be able to review anything that has been resubmitted when they're reapplying for approvals.

## **Security**

VOB places the utmost importance on the safety and security of any personal information submitted in the vendor registration process. All information and documentation are uploaded via a SSL client and server certificate secured web portal. As an approved Vendor, all web data entry is secured via a password of your choosing that must be at least eight characters long. Any vendor information submitted into VendOnBoard (VOB) are stored in a relational database behind a hardware firewall. Only VendOnBoard Database Administrator can access this database.

## Accessing VendOnBoard

Accessing VendOnBoard (VOB) is simple. Please go to [www.vendonboard.com](http://www.vendonboard.com). Next, click on the **Sign In** button on the top right.



[Why VendOnBoard](#) [About](#) [Pricing](#) [Contact](#)

[Sign In](#)

[Request a Demo](#)

## Onboard and Manage your Vendors!

VendOnBoard provides an easy-to-use web portal for vendors to sign up to work with you and for your team to manage them.

Enter your email...

Get Started

Already using VendOnBoard? [Sign in](#)



Once you click Sign In, it will take you to the login page.

Here is where you will need to request a log in. Please **Click here to request a vendor login**.

A screenshot of the VendOnBoard login page. At the top left is the VendOnBoard logo. Below it are two input fields: one for the username and one for the password. To the right of the password field is a checkbox labeled 'Remember Me'. Below these fields is a blue button labeled 'LOGIN' with a right-pointing arrow. Underneath the button is the text 'Forgot your USERNAME or PASSWORD?' followed by 'OR' and a link: 'Don't have a login? Click here to request a vendor login.' A blue arrow points to this link.

## Filling Out VOB Vendor Request Forms

Fill in the basic information as an individual, corporation, a non-incorporated entity, etc.  
All questions denoted with the \* must be completed before moving submitting for approval.



Company:\*

Example Inc

Phone:\*

555-555-5555

Address:\*

Public, 123 Anywhere Street,

Fax:

555-555-5555

Anytown,

Email:\*

john@xyz.com

City:\*

Cherry Hill

Website:

www.example.com

Country:\*

United States

Tax Id:\*

Tax-id

State / Province:\*

Alabama

Postal Code:\*

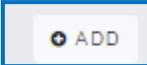
01234

Description of Services Offered:\*

provides a wide range of leading-edge scientific, engineering, management, and computer services to the public and private sectors. Our mission is to consistently deliver creative, high-quality, technology-based services to our customers on time and within budget.

If you scroll down to the bottom of the page, there is the **Add Company Contacts** section. This is where you should add the information requested for people to have access to your account. Add yourself, or a different point of contact, for your company. Please click the **+ ADD** button in the top left.

### Add Company Contacts

Name	Address	Phone	Email	
<i>Click on the 'add' button below to add required contact information.</i>				

[BACK TO LOGIN](#)


[SUBMIT](#) [CANCEL](#)

By clicking the **+ ADD** button, a pop up window will appear that will allow you to fill in the contact information. Once the contact information has been added, click **SAVE** on the bottom of the form.

#### Add Contact

First Name:*	Phone:*
<input type="text" value="John"/>	<input type="text" value="555-555-5555"/>
Last Name:*	Fax:
<input type="text" value="Q."/>	<input type="text" value="555-555-5555"/>
Address:*	Email:*
<input type="text" value="Public, 123 Anywhere Street,"/> <input type="text" value="Anytown,"/>	<input type="text" value="example@xyz.com"/>
City:*	
<input type="text" value="Any City"/>	
Country:*	
<input type="text" value="Select Country"/>	
State / Province:*	
<input type="text"/>	
Postal Code:*	
<input type="text" value="01234"/>	

#### Add Company Contacts


Name	Address	Phone	Email	
<i>Click on the 'add' button below to add required contact information.</i>				

[BACK TO LOGIN](#) [SUBMIT](#) [CANCEL](#)

Once all the Vendor information and Company contact is completed, click the blue **SUBMIT** button on the bottom.

A message will appear in green at the top of the form. Within one (1) business day you will receive an email which will contain your username and password, and confirm that you are approved to move forward in becoming a VendOnBoard vendor!

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Your request is registered successfully. You will be notified once it gets approved.

**Company:**\*

**Address:**\*

**City:**\*

**Country:**\*

**State / Province:**\*

**Postal Code:**\*

**Phone:**\*

**Fax:**

**Email:**\*

**Website:**

**Tax Id:**\*

**Description of Services Offered:**\*

provides a wide range of leading-edge scientific, engineering, management, and computer services to the public and private sectors. Our mission is to consistently deliver creative, high-quality, technology-based services to our customers on time and within budget.

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### Add Company Contacts

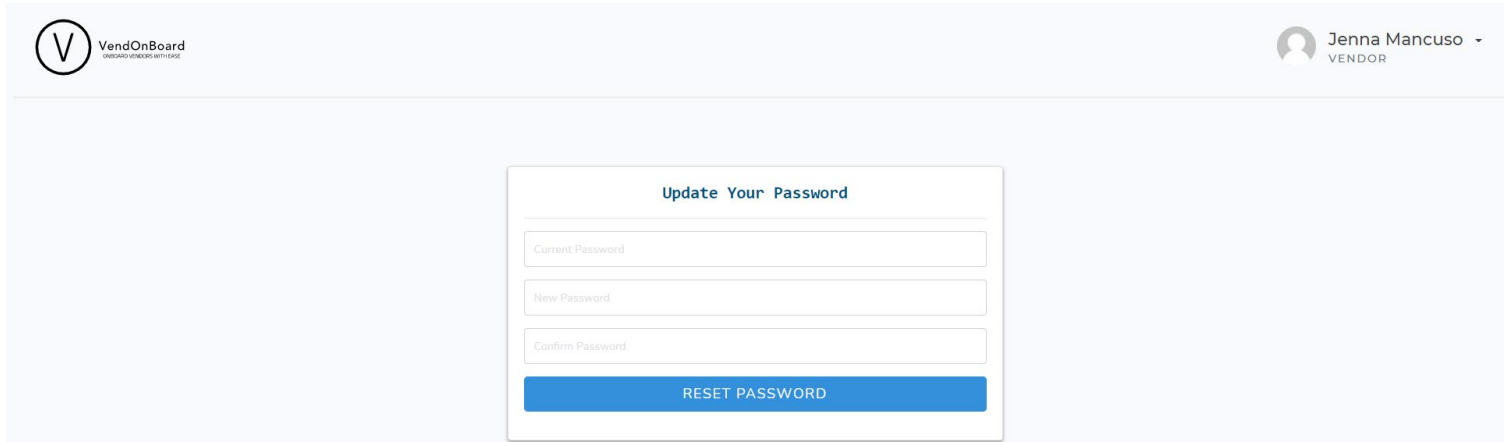
Name	Address	Phone	Email	+ ADD
<i>Click on the 'add' button below to add required contact information.</i>				

[BACK TO LOGIN](#)[SUBMIT](#) [CANCEL](#)



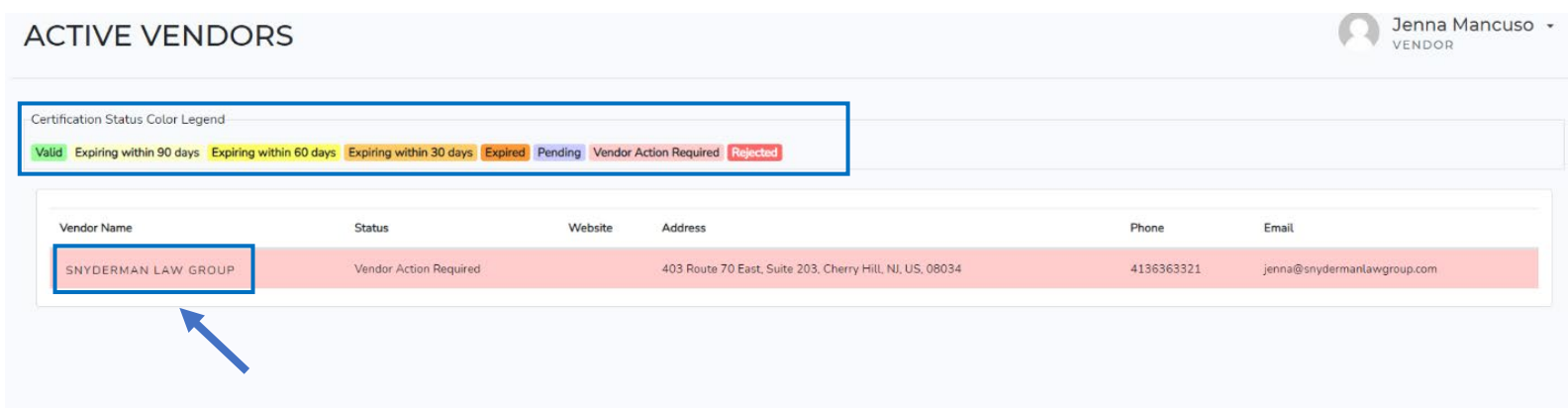
## Submit Vendor Forms: Set Up

- Log into the VendOnBoard website via the link in your email, or by typing <http://app.vendonboard.com/login> into your web browser.
- Login using the Username and Password provided in the email.
- The site will prompt you to change your password, the safest passwords are often eight (8) characters long, contain upper and lowercase letter, and have at least one (1) number.



The screenshot shows the 'Update Your Password' form on the VendOnBoard website. The form is centered on a light blue background. At the top left is the VendOnBoard logo, and at the top right is the user profile for Jenna Mancuso, Vendor. The form itself has a title 'Update Your Password' and three input fields: 'Current Password', 'New Password', and 'Confirm Password'. Below the fields is a blue button labeled 'RESET PASSWORD'.

- Once you have successfully updated your password, you will be directed to your Active Vendor page, which will be color coded as red to signify that a Vendor action is required.
- The **Certificate Status Color Legend** at the top of the page shows the different variations of vendor status and what those colors represent
- By clicking on your **vendor name**, it will bring you to your Vendor Home Page.



The screenshot shows the 'ACTIVE VENDORS' page. At the top right is the user profile for Jenna Mancuso, Vendor. Below the header is a 'Certification Status Color Legend' with the following categories: Valid (green), Expiring within 90 days (yellow), Expiring within 60 days (orange), Expiring within 30 days (red), Expired (dark red), Pending (purple), Vendor Action Required (pink), and Rejected (dark red). Below the legend is a table of vendors. The table has columns for Vendor Name, Status, Website, Address, Phone, and Email. The first row is for 'SNYDERMAN LAW GROUP', which has a status of 'Vendor Action Required' and a pink background. A blue arrow points to the vendor name.

Vendor Name	Status	Website	Address	Phone	Email
SNYDERMAN LAW GROUP	Vendor Action Required		403 Route 70 East, Suite 203, Cherry Hill, NJ, US, 08034	4136363321	jenna@snydermanlawgroup.com

## Submit Vendor Forms: General Information

- There are three (3) required documents and one (1) optional documents that you will need to submit to become an official VendOnBoard (VOB) vendor. Each document can be uploaded and/or filled out via the corresponding tabs as down below.
- On the right hand side of the screen displays your Vendor Messages. This informs you on what documents are missing and still need to be completed.
  - Required:
    - Certificate of Liability Insurance (COLI)
    - Annual Supplier Representations and Certifications (ASRC)
    - Form W-9
  - Optional:
    - DCAA/DCMA Letter. If you have a DCAA approved accounting system, or a DCMA approved purchasing system.



### Vendor Details

**VENDOR NAME:** Snyderman Law Group  
**PHONE:** 4136363321

**ADDRESS:** 403 Route 70 East Suite 203  
**EMAIL:** jenna@snydermanlawgroup.com

**CITY:** Cherry Hill  
**CATEGORY:** Technology

**COUNTRY:** US  
**SUMMARY:** legal services, startup, govcon, small to mid sized business

**STATE / PROVINCE:** NJ  
**TAX ID:** 123456789

**POSTAL CODE:** 08034

**CERTIFICATION STATUS:** Vendor Action Required

### Vendor Messages

- Annual Supplier Representations and Certifications (ASRC) is missing, please fill out the form.
- W-9 is missing, please fill out the form.
- Certificate of Liability Insurance (COLI) is pending for review.

[Contacts](#) | 
 [Certificate of Liability Insurance](#) | 
 [DCAA/DCMA](#) | 
 [Annual Supplier Representations and Certifications](#) | 
 [W-9](#)

Name	Address	Phone	Fax	Email	+ ADD
Jenna Mancuso	403 Route 70 East, Suite 203	4136363321		jenna@snydermanlawgroup.com	-

## Certificate of Liability Insurance

- Click the +ADD button, which will allow you to upload an electronic or scanned copy of your Certificate of Liability Insurance.
- If you are unsure about what a certificate should look like, or the monetary requirements, view a sample document as provided in VOB.

File Name	Description	Added On	Added By	Status	+ ADD
No data available in table					

## DCAA/DCMA Letter

- If you are able to supply a letter showing you have a government approved accounting or purchasing system, click the +ADD button, which will allow you to upload a Pdf or scanned copy.

File Name	Description	Added On	↑↓	Added By	Status	+ ADD
No data available in table						

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## Annual Supplier Representations and Certifications

- Click + COMPLETE FORM to load the fill-in form for basic vendor information.
- Fill in the required information and check any relevant boxes pertaining to your corporation or individual entity
- Sign your Name, Title, Date, and check the Authorized Signature box
- If you forgot any required information, the VOB will alert you before allowing you to go to the next step.

Company	Non USA Citizen	EPLS	Added On	↑↓	Added By	Status	+ COMPLETE FORM
No data available in table							

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### Annual Supplier Representations and certifications

1. ASRC
2. Remit to Address
3. Accounts Receivable
4. FAR Compliance
5. Business Classification

Annual Supplier Representations and certifications

Company Name: \*  
Snyderman Law Group

Tax Id: \*  
123456789

Order Address: \*  
403 Route 70 East

Phone: \*  
4136363321

City: \*  
Cherry Hill

Fax:  
856-667-7586

State / Province: \*  
Alabama

Email: \*  
jenna@snydermanlawgroup.com

Postal Code: \*  
08034

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Effective Date: mm/dd/yyyy

Expiration Date: mm/dd/yyyy

## W-9

- Click the +ADD button, which will allow you to upload an electronic or scanned copy of your Form W-9.
- If you need a blank form, click on the link as shown or type <http://www.irs.gov/pub/irs-pdf/fw9.pdf>
- Once you've filled in the relevant information on the blank form, click the Upload button to submit.

File Name	Description	Added On	Added By	Status	+ ADD
No data available in table					

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### Upload document

1. Upload W9 2. Change Vendor W9

Please upload your latest W-9 form.  
NOTE: If you have not completed the w-9 form, download it from website at:  
<http://www.irs.gov/pub/irs-pdf/fw9.pdf>

Choose file

Previous

Effective Date:

## **Congratulations – You’ve a VendOnBoard Vendor!**

- After submitting all required forms, your Vendor homepage will list all your documents in the Vendor Messages section as pending. It will be in blue.
- Your documents will be reviewed and when they are approved, you will receive an email confirmation that you are a valid VOB Vendor.