01 / PROSPECT AND INTAKE

Vendor onboarding & compliance

Prepared for Cedar Procurement (fictional) | Workflow configuration v1

Proposed design · Fictional demonstration cases · No connected systems

CURRENT WORKFLOW

Review supplier applications, reconcile business records, verify required insurance and route contract exceptions to the authorized purchasing manager.

Review path: Procurement specialist → authorized purchasing manager | Systems: ERP and supplier portal

MONTHLY CASES	STAFF MIN / CASE	STAFF HOURS / MONTH
240	90	360

Baseline: cases × active staff minutes ÷ 60. Current effort, not forecast savings.

End-to-end elapsed time: to confirm separately from active staff effort.

WORKFLOW INTAKE

PDF / RECORD

Supplier application

Application submitted through the supplier portal or as a completed form.

PDF / IMAGE

Certificate of insurance

Certificate supplied by the vendor or insurer; check validity and required coverage.

RECORD / CSV

Vendor master record

Existing ERP supplier record or an exported vendor register.

PDF

Signed supplier agreement

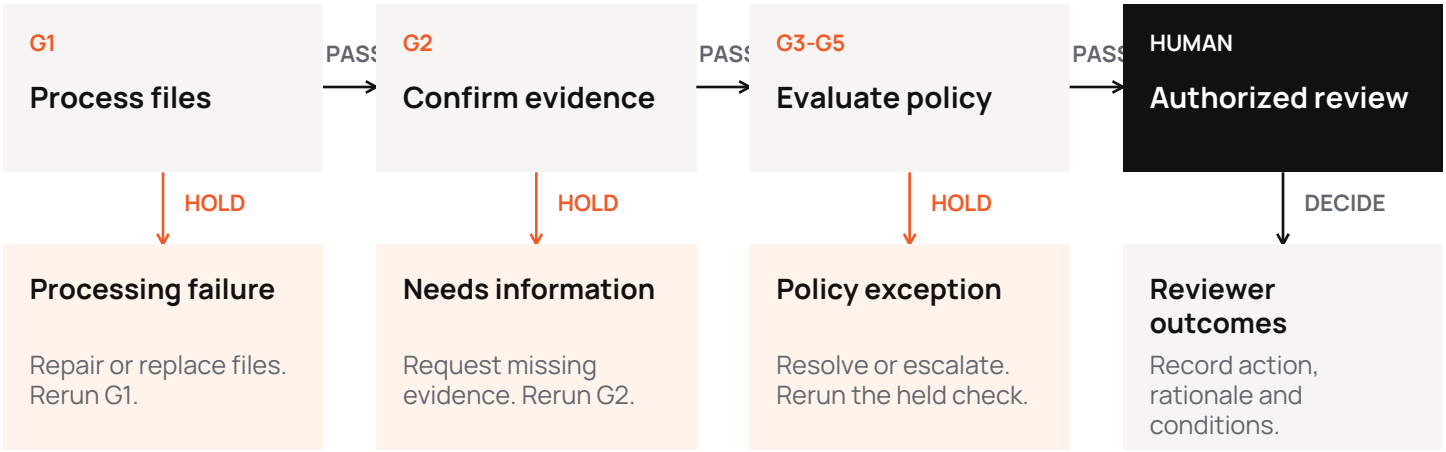
Executed agreement, including any approved contract amendments.

Abridged design. Full workflow details in the linked interactive workspace.

02 / LOGIC AND EXCEPTIONS

From evidence to decision

Processing and completeness come first. Only ready cases reach policy evaluation.



CONFIGURED POLICY CHECKS

Pass all checks to prepare a recommendation; the reviewer owns the decision.

G3 Confirm the legal entity matches the vendor master

Pass: Legal name and registration identifiers agree across the application and ERP record.

Hold: Route conflicting identifiers or a possible duplicate to procurement for reconciliation.

G4 Verify insurance is current and meets the configured policy

Pass: Coverage dates are current and coverage meets the purchasing policy; required limits remain to be confirmed.

Hold: Request a corrected certificate; hold onboarding until coverage is validated.

G5 Review contractual exceptions with the purchasing manager

Pass: The signed agreement is complete and any exceptions have recorded authorization.

Hold: Escalate unapproved deviations to the purchasing manager; retain the onboarding hold.

Abridged design. Full workflow details in the linked interactive workspace.

03 / WORKSPACE AND NEXT STEPS

A reviewable case for every decision

Explore the actual DecisionFlo interface through the interactive link below.

INSIDE THE WORKSPACE

01 **Evidence and findings**

Source files, connected evidence and findings stay with the case.

02 **Rules and exceptions**

Per-rule outcomes explain what passed, what is missing and what needs review.

03 **Human decision**

Review path: Procurement specialist → authorized purchasing manager.

04 **History and handoff**

Case events, decisions and workflow version support a traceable handoff.

REVIEWER ACTIONS

Approve vendor · Request missing evidence · Escalate contract exception

THE DECISION PACKET

01 **Supplier readiness recommendation**

An onboarding recommendation with entity match, insurance findings and a clear account of unresolved contract exceptions.

02 **Evidence & discrepancy register**

A source-linked review of application, ERP record, insurance certificate and signed agreement, with each mismatch routed to its owner.

03 **Purchasing decision packet**

The proposed vendor action, the required purchasing authority and an auditable explanation of the decision.

NEXT STEPS

Confirm evidence and policy with the process owner. Test complete, incomplete and exception cases. Agree pilot measures and decision authority.

Contact DecisionFlo · decisionflo.ai/demo

Open the interactive workspace

Talk to DecisionFlo