

New Vendor Setup Checklist Excel Template

Efficiently organize your new vendor onboarding process with this **new vendor setup checklist** Excel template. It streamlines tasks, ensuring all necessary documentation and approvals are completed promptly. Perfect for maintaining compliance and fostering strong vendor relationships.

Sample Checklist Structure

Step	Task Description	Responsible	Status	Date Completed	Notes
1	Receive & review vendor application form	Procurement	Pending		
2	Obtain W-9/Tax ID documentation	Finance	Pending		
3	Verify business license & insurance certificates	Compliance	Pending		
4	Enter vendor details into ERP system	IT	Pending		
5	Obtain internal approvals	Department Head	Pending		
6	Send welcome email with onboarding pack	Procurement	Pending		

Download Template

[Download the Excel template](#) (customize as needed for your organization).