Vendor Onboarding & Compliance Portal

User Guide

Odoo 18 / 19 Community & Enterprise

Purchasing & Procurement

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Technical reference

Technical name	gb_vendor_onboarding_compliance_portal
Version	18.0.1.0.0
Odoo series	18.0 and 19.0
Category	Purchasing & Procurement
Depends on	base, mail
Licence	LGPL-3
Data models	gb.vendor.onboarding, gb.vendor.document, gb.vendor.doc.type, gb.vendor.request.do

1. Overview

New suppliers arrive with missing bank details, tax references and out-of-date insurance, and the vendor master gets dirty. This app runs a structured onboarding that collects the documents, routes them for approval and tracks expiry.

Each onboarding request gathers registration, contact and bank details plus typed documents, and moves Submit → Start Review → Approve / Reject. Documents are verified and renewals are requested before they expire.

Who is it for?

- Procurement teams onboarding new suppliers.
- Finance teams needing clean, verified bank and tax data.
- Compliance teams tracking insurance and certificate expiry.

UK angle

Supports UK supplier due-diligence practice: collect and verify bank/tax/insurance evidence and track document expiry.

2. Installation

The module installs like any standard Odoo app. You need the Administration / Settings access right to install apps.

- Enable developer mode is not required for normal use.
- Open Apps from the main menu.
- Click Update Apps List (top menu) so Odoo re-reads the addons folder.
- Remove the default Apps filter and search for "Vendor Onboarding & Compl" (technical name **gb_vendor_onboarding_compliance_portal**).
- Click Install. The dependencies (base, mail) are installed automatically.

After installation a new top-level menu becomes available (see Configuration below). On a multi-company database, install once; the records are company-aware where the underlying models are.

3. Configuration

Open Vendor Onboarding > Configuration > Document Types (gb.vendor.doc.type) and define which documents are required, with category and whether they expire.

Nominate the reviewers who approve onboarding requests.

4. Step-by-step Walkthrough

The flow below uses the real menus, buttons and statuses shipped with the module. Labels are quoted exactly as they appear in the interface.

4.1 Start an onboarding

1. Create a request under Onboarding (gb.vendor.onboarding) and fill the Registration, Contact and Bank Details tabs.
2. Attach the required Documents (gb.vendor.document).

4.2 Request anything missing

1. Click Request Documents (gb.vendor.request.docs.wizard) to ask the supplier for missing items.

4.3 Review and decide

1. Click Submit, then Start Review.
2. Use Mark Verified on each document, then Approve or Reject the request (with notes); Reset to Draft is available.

4.4 Track expiry

1. Use the Expiring / Expired and Has Expired Docs filters to find documents needing renewal.
2. Click Request Renewal to chase the supplier.

5. Feature Reference

Every feature below is implemented in the module; the model behind each one is named in brackets so administrators can locate it.

Onboarding requests

Registration, contact and bank details captured in one record moving Submit → Review → Approve/Reject (gb.vendor.onboarding).

Typed documents

Configurable document types with category and expiry behaviour (gb.vendor.doc.type).

Verification

Mark Verified per document before approval (gb.vendor.document).

Request missing docs

Wizard to ask suppliers for outstanding items (gb.vendor.request.docs.wizard).

Expiry tracking

Filters for expiring/expired documents and a Request Renewal action.

Approval routing

Reviewer assignment with approve/reject and rejection notes.

6. Tips, Troubleshooting & FAQ

Q: Which documents are mandatory?

A: Whatever you configure under Document Types, including whether each one expires.

Q: How do I chase a supplier for missing docs?

A: Use the Request Documents wizard.

Q: Can I see expiring insurance at a glance?

A: Yes - use the Expiring / Expired filter.

Q: Who approves an onboarding?

A: The reviewer you assign; they use Approve or Reject.

Q: Can I reopen a rejected request?

A: Yes - Reset to Draft.

Q: Does this keep the vendor master clean?

A: Yes - verified bank/tax data is captured before approval.

7. Support

We are happy to help you get the most out of this app.

Email	support@pokutsoft.com
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Licence	LGPL-3
Supported	Odoo 18.0 and 19.0

When reporting an issue please include your Odoo version, the module version (18.0.1.0.0), the menu/screen you were on and the exact error text. This module performs all processing inside your Odoo instance unless an external connector is explicitly configured by you.