Vendor Onboarding Account Summary Overview

1. **Getting Familiar with the Onboarding Screen**

REVCASCADE   Merchandising   **Onboarding**   Directory   Hello, Username ▾   [search]

     a. Onboarding Queue

The onboarding queue is an overview of all your vendor connections and the current status of their onboarding account. The onboarding screen will provide a status of each vendor account, a due date and progress bar

🏠 / Onboarding Queue

| Vendor		Aging	Progress
⭐ **My Test Account** Ready for Setup Due 6 months ago	Email sent to vendor with onboarding instructions	30+	
⭐ **Proposals Demo Vendor** Ready to Provision Due 6 months ago	Retailer added vendor, RevCascade to provision	30+	▮
⭐ **Merchandising Demo 2** Vendor Setup Due 10 months ago	Vendor is working on completing task list	30+	▰▰
⭐ **Demo Vendor New Proposals** Vendor Approval Due 11 months ago	Vendor completed setup and is awaiting retailer approval	30+	▰▰▰

Review Workflow

Ready to Provision
This vendor is ready to have an account provisioned by RevCascade

Provisioned
This vendor now has a RevCascade account and is awaiting email with onboarding instructions.

Ready for Setup
This vendor has been sent an email with onboarding instructions.

Vendor Setup
This vendor is completing the vendor setup wizard.

Vendor Approval
This vendor has completed setup and is awaiting approval.

Ready to Launch
Vendor has completed all reviews and is ready to go live.

Post-Launch Testing
Vendor is live and under supervision.

Complete
Vendor is live and processing orders.

Archived
This vendor has been archived.

On Hold
Vendor is on hold.

i.   Retailer Launch List

Once a vendor has completed all their on-boarding task list items, the status of their on-boarding account will update to **Ready to Launch**. The account now requires action by you and your team. Depending on your retailer connection requirements *(i.e. approving shipping labels, packing lists, ect..)* before the connection with the vendor can be completed, these "launch items" will need to be reviewed and completed on the retailer end
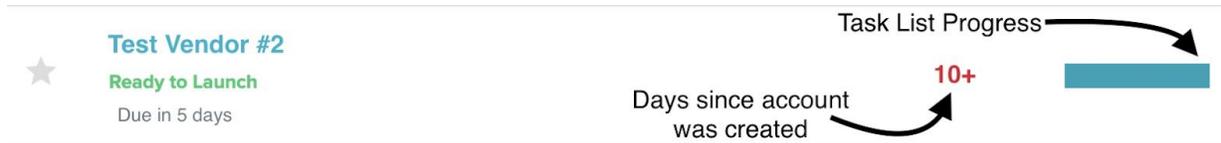
a. After selecting vendor, the following summary page is where you can access and view the individual vendor on-boarding account
     i.   To access and view your retailer launch list items, click **Launch List** on the left-hand corner of the page under *Summary*
     ii.   If you wish to make any changes regarding the vendor on-boarding account, click the **More Actions** button

Updates Include:

    1. *Go Live Date*
    2. *Archive* (typically done after the account has been completed)
    3. *Place on hold* (if the vendor or yourself are not ready to continue with on-boarding)

b. After selecting the **Launch List** button, all retailer and RevCascade action items will appear. These items **must** be completed by you and your team to complete the vendor on-boarding account
    i.   Approving products (Merchandising Tool)
    ii. Assign Carrier Account (If vendor opted to generate labels outside of RevCascade Portal and you require vendor to use a retailer prepaid account)
    iii. Approve Shipping Label (If you have specific shipping label requirements)

Task	Status
Approve Items Ensure all items have the required attributes.	**Pending** Retailer
Receive Vendor Inventory Receive initial inventory file from vendor.	**Pending** RevCascade
Upload Carrier Account Form Upload a carrier account application.	**Done** April 12
Assign Carrier Account Assign vendor a carrier account number.	**Pending** Retailer
Upload Sample Shipping Label Upload a sample shipping label for approval.	**Done** April 12
Approve Shipping Label Approve a sample shipping label.	**Pending** Retailer

c. Once all **Launch List** items have been completed by RevCascade and you and your team the vendor account is now live within the RevCascade Portal.