

Vendor Onboarding

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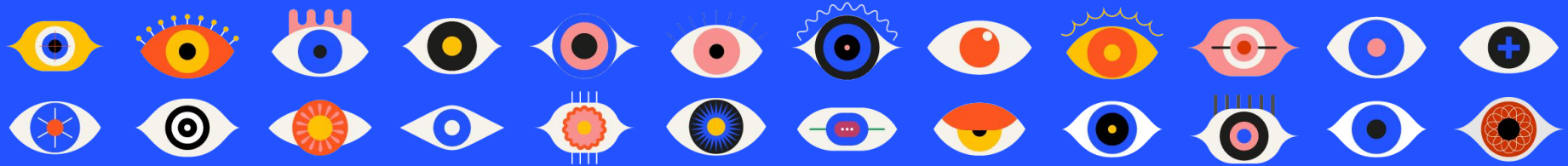
Designed for vendors, but useful to all, this onboarding guide provides transparency on everything you may need to know about agreeing a contract and delivering a proposal under Intersect's administration.

You can read about Intersect's roles as an administrator [here](#).

Content

This onboarding guide will take you through the following

- Procurement
- Delivery Assurance
- Smart Contracts
- Milestone acceptance
- Delivery events
- Offboarding



Procurement

Intersect's procurement team will lead on any contract agreements for Intersect or where Intersect is selected as an administrator on behalf of the Cardano Development Holdings (CDH).

The first part of the process is to agree a traditional legal contract with Intersect as the administrator for your proposal.

Contract

Contract Finalisation

- Usually, following successful on-chain voting, we will invite you to complete your contract.
- Hopefully at this point you have already been in contact and a draft contract is in progress, this will now be subject to the necessary final reviews.
- This is your last chance to make any amendments before signing. Remember your delivery will become public information and milestones will be immutably recorded on-chain.

Contract Signing

- It is a constitutional requirement to have a contract in place between the vendor and administrator.
- Before delivery begins or any funds can be released, the contract must be signed by all parties. Once the final draft has been completed, the contract will be sent for signature by the procurement team.

Additional details

More details on our contracting, associated policies, KYC and KYB can be found here on our [knowledge base](#).



Delivery Assurance

Once procurement have completed all their legal checks and have a contract signed by both the vendor and Intersect, they will hand over the contract to delivery assurance to manage.

The delivery assurance team will be the vendor's main point of contact with Intersect throughout the management of the contract.

Delivery Assurance

Introduction to delivery assurance

- You will be given a delivery assurance team member as your main point of contact throughout contract delivery. They will support milestone tracking, milestone sign off, and ensure alignment between the legal contract, smart contract, and what's being delivered.

Comms Channel Setup

- A communication channel will be created (Slack, Discord or email) to share any updates or ask any questions directly with the delivery assurance team at Intersect (providing permission is given to Intersect to record contact details).

Delivery Familiarisation

- We will set up an onboarding call with you to discuss your milestones, acceptance criteria, third-party assurance review, and how the milestone acceptance process works.
- We will also share and explain with you how to request any changes to the contract, should you need to do this.

Additional Details

<https://docs.intersectmbo.org/cardano-facilitation-services/cardano-budget/intersect-administration-services/intersect-as-an-administrator>



Smart Contract Creation: Fund

Introduction to Smart Contracts

- All deliveries under Intersect's administration, where practically possible, will be managed through a smart contract. If you have not already done so you should familiarize yourself with the smart contract framework [here](#).

Funding a Vendor Contract

- The delivery assurance team will submit an on-chain action to fund a specific vendor smart contract instance, this will contain your payment schedule from your agreed written contract.
- This smart contract has to be witnessed by Intersect's independent oversight and the process for this, due to how timing works on-chain, this could take up to 36 hrs.
- Vendors also must verify and sign this transaction. This will also validate that the withdrawal address provided by the vendor is correct.

That's it! From this point onwards your delivery is immutably confirmed on-chain and delivery can begin.

Additional Details

Full details about the smart contract framework and our oversight committee can be found on our knowledge base [here](#).



Smart Contract Administration Dashboard

Administration Tooling

- To support the use of smart contracts, an administration dashboard is available for you to use. It will be accessible to vendors via the credentials provided by the vendor in the legal contract.
- delivery assurance will check to ensure you can login and interact with your smart contract instance.
- This will allow you to complete the following actions:
 - Sign a contract
 - Sign a contract change
 - Attach your Milestone Acceptance Forms (MAF)
 - Withdraw milestone payments on chain
 - View your project details, milestone details and progress.
- Documentation on the administration tooling is available [here](#).

Milestones: Evidence

Milestone Evidence

- Once you have completed a milestone, you should attach milestone completion evidence as metadata to that milestone through the administration dashboard. This evidence is expected to show that you have delivered what was agreed in the legal contract.
- The milestone evidence should be submitted using the [MAF template](#), as outlined in the [delivery assurance Best Practice Policy](#) as this will enable you to include all the necessary details.
- This should be submitted prior or on the milestone delivery date.
- All submitted evidence is transparent to the community. If there is something sensitive to share please reach out to your delivery assurance contact.

Milestones: Review

Evidence Review

- You must share a copy of the MAF with delivery assurance for review so it can be agreed before it is finalised on-chain.
- Should evidence not be supplied, or should the the evidence be deemed insufficient by Intersect, the team will work with you to rectify the issue and if not, then we will request that milestone to be paused.
- The Intersect leadership team will review and approve any milestone pause request before it is applied.
- If required, Intersect can attach metadata with rationale explaining any decision or feedback.
- If a milestone is paused, once appropriate evidence has been sufficiently provided by the vendor, the payment can be resumed and the payment will be available to the vendor for withdrawal.

Milestones: Metadata and MAFs

Let's talk about metadata, Milestones Acceptance Forms (MAFs) and Invoices in a bit more detail.

Milestone Metadata

- You are required to submit a MAF explaining what you did and how you achieved your milestone, in line with the acceptance criteria in your legal contract.
 - Here is an example of a [Completed MAF](#)
- You are required to follow this process to ensure there is consistency across all vendors and projects and also help the community understand the value you have delivered.
 - Here is a link to our Knowledge Base outlining some best practices for how to write milestone evidence - [delivery assurance Process and Best Practice Policy | Intersect - Knowledge Base](#)
- We advise sending the MAF offline initially to operational-services@intersectmbo.org so if there are any issues these changes can be made before the form is added as metadata.
- Please attach a completed copy of the MAF form as metadata against the completed milestone via the [smart contract dashboard](#).

Note: If you have not met the milestone and MAF metadata, and the invoice submission deadline – your payment will be paused until these have been rectified.

Milestones: Invoices

Let's talk about metadata, Milestones Acceptance Forms (MAFs) and Invoices in a bit more detail.

Invoice Submission

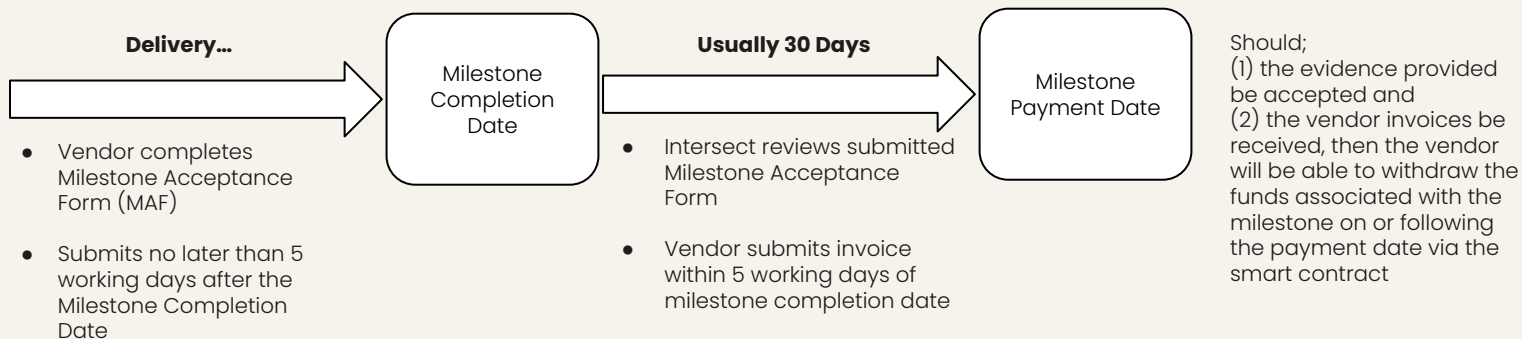
- Vendors must submit invoices for every milestone, please submit invoices for to billing@intersectmbo.org
- Invoices must be submitted in accordance with the invoice guidelines provided in the [contract's appendix](#). All invoices are processed and any incorrect invoices will be rejected.
- The invoice should be submitted within **5 working days** of the milestone completion date to avoid payment delays.

Note: If you have not met the milestone and MAF metadata, and the invoice submission deadline - your payment will be paused until these have been rectified.



Payment

Each written contract specifies a milestone completion date and a payment date. This payment date is usually 30 days following the milestone completion date. This allows a period to review and approve milestone evidence, much like how traditional contracts have payment terms.



Whilst Intersect does not want to unduly deny or delay funding to vendors it is important that sufficient time is taken to review evidence and if necessary, solicit community feedback prior to the payment date.

As a safeguard for vendors, the smart contract framework operates as ‘fail-open’, this means that should Intersect or its oversight fail in any way, vendor payments will never be automatically blocked.

Smart Contract Actions



In this next section we go through each smart contract action. These are events that may occur during your delivery. We will provide a little more detail on what happens and what you can expect should these happen. These are the following actions:

- Pause
- Resume
- Modify
- Disburse
- Escalation

Pausing a Milestone

Due to the 'fail open' nature of Vendor Smart contracts, payments are automatically set up to release funds 30 days after the Milestone delivery due date.

Should a milestone not be completed by the contracted milestone delivery date, the payment will be paused by Intersect admin until completion can be evidenced and the MAF is signed off.

If a milestone delivery date is reached and a MAF has not been completed to the required standard, you will be contacted by the delivery assurance team to discuss the status of the milestone.

The decision to pause a payment Milestone will be reviewed by the Intersect leadership team.

You will be notified by the delivery assurance team of any decision to Pause any milestone payments along with justification. Any justification as to why a milestone has been paused will be attached to the smart contract dashboard as metadata.

Note – Should a MAF have not have been completed, Intersect will pause the payment.



Resume a Milestone

Following the decision to Pause a milestone, the delivery assurance team will communicate the reasons for doing so and outline rectification actions required to resume the milestone payment.

After rectification, completion of a successful [milestone review](#) and associated MAF, Intersect's delivery assurance team will recommend to resume the milestone to allow payment.

The decision to resume a payment Milestone will be taken by the Intersect leadership team.

As a vendor you will be notified by the delivery assurance team of any decision to resume any paused milestone payments.

Note that pausing and resuming a milestone does not affect the milestone delivery date or payment date. Should any rectification effort go past these dates, the payment will be immediately available following the resume action.

In the event that the Milestone cannot be resumed in its current form it may be necessary to [Modify Milestone](#) or [Escalate](#).



Modifying a Contract

During the contract lifecycle, it may be necessary to update or amend your contract. If there are significant milestone date changes or acceptance criteria changes, you must submit a request for contract modification.

You must send your request to the delivery assurance Team, a template will be provided. However we would much prefer up front discussion and collaboration so that both parties agree before a final request is submitted.

Delivery assurance and procurement will work with you to review and make changes to the contract which will be reflected in the legal contract or SOW addendum to formally record the changes. Note that Intersect must still abide by any constitutional requirements.

Before these changes can be implemented, a modify action will need to be carried out on your vendor smart contract instance, making this change transparent to the community.

This modification action will be initiated and signed by Intersect, it will then be passed to the **vendor** and oversight committee to sign. This must be completed within a **36-hour period** else the smart contract action needs to be resubmitted.



Requesting a Disbursement

There may be situations where smart contracts and ada payments do not meet the requirements of the project or situation, and it is required to disburse the funds in stables or fiat. This is a process which should be limited in use, as moving funds out of a smart contract severely reduces the transparency of funds thereafter.

Should a situation arise to move funds out of a smart contract, the vendor should make this request to their delivery assurance contact. These requests will be handled by exception with the Intersect leadership team.

Rationale

To start the request, the vendor should provide a rationale to Intersect for review. An agreed rationale should be attached to the Disburse action.

Escalation paths

Sometimes it is not possible to articulate issues and concerns in a predefined manner.

Intersect will always signpost clear and obvious paths for escalation. Should you have any concern regards your delivery you are asked firstly to contract the delivery assurance team via one of the following methods:

- delivery@intersectmbo.org
- Via your vendor delivery assurance channel (*da-vendorname*)

Delivery assurance Offboarding

Offboarding process

Offboarding

Once your final milestone is completed, Intersect will carry out the following due diligence checks to make sure everything is wrapped up.

- At the end of the contract, delivery assurance will conduct a final milestone review to verify that all deliverables have been met according to the contract. This includes a comprehensive review of the final evidence submitted, cross-referencing it with the legal contract and the smart contract.
- Agreement with the vendor if any unclaimed funds should be swept back to the treasury
- A chance for the vendor to provide any feedback or any outstanding questions.
- Once everything is confirmed, you will receive an email from DA confirming that the contract has been completed and no further action is required from you.
- Your access to any systems will then be closed, any communications channels etc will be archived.



Thank you

For more details please reach out to the Intersect core operations team at:

delivery@intersectmbo.org

procurement@intersectmbo.org

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Appendix

Contact details

Finance/Invoicing Details

Contact Details

Useful contract details:

- delivery@Intersectmbo.org
 - Used for general delivery inquiries.
 - Used for contract change requests.
- Procurement@Intersectmbo.org
 - For Contract and commercial support
- Billing@Intersectmbo.org
 - Invoice submissions

Social Channels

- [Intersect Twitter](#)
- [Discord](#)

The Team

Head of Operations – Nick Cook

Procurement

- Tayla Dix
- Marina Ramos

Delivery assurance Team

- Abbie Yeates
- Duncan Soutar
- Gemma Dakin
- Georgia Hutton
- Matt Davis

Smart Contract Further Reading

Revisit some of the previous information and blogs relating to smart contracts and Intersects oversight committee

- [Smart Contracts & Cardano Budgets](#)
- [Guide to Oversight Committees](#)
- [Oversight Committee Roles & Responsibilities](#)



Other Reading & Useful Links

Smart Contracts

- **Smart Contract Administration Dashboard – Demo videos:**
 - [Administration UI](#)
 - [Public Dashboard](#)
- **Smart Contract Feature Backlog GitHub:**
 - [Feature backlog](#)
- **Smart Contract Preview Environment (test):**
 - <https://treasury.preview.sundae.fi/>
- **Intersect Knowledge Base:**
 - [Intersect Administration Services | Intersect – Knowledge Base](#)