CAPABILITY OVERVIEW
SUPPLIER ONBOARDING MODULE

SYSPRO-INTEGRATED PROCUREMENT

Supplier Onboarding

A governed, end-to-end onboarding workflow — capture, validate, document, approve and post suppliers directly into SYSPRO, with every record linked for audit and compliance.

Fully integrated into your SYSPRO ecosystem

www.swiftsolutions.co.za demo@swiftsolutions.co.za

FULLY INTEGRATED INTO YOUR SYSPRO ECOSYSTEM

Onboarding, captured and controlled end-to-end

Swift Solutions streamlines supplier onboarding from start to finish within your SYSPRO ecosystem — capture supplier information, upload supporting documents, manage approvals and verify compliance in one secure workflow. Once approved, suppliers are created directly in SYSPRO with a single click, while all documents remain linked for future reference, audits and compliance.

Suppliers Onboarded. Verified. Approved. Integrated.

Faster onboarding · complete visibility · stronger control

1

Guided validation

Every outstanding field and document is surfaced, so suppliers are submitted only when genuinely complete.

2

Document compliance

Typed, mandatory uploads with expiry tracking keep compliance current and audit-ready.

3

Role-based approval

Only authorised roles approve. Every approval and rejection is deliberate, logged and traceable.

4

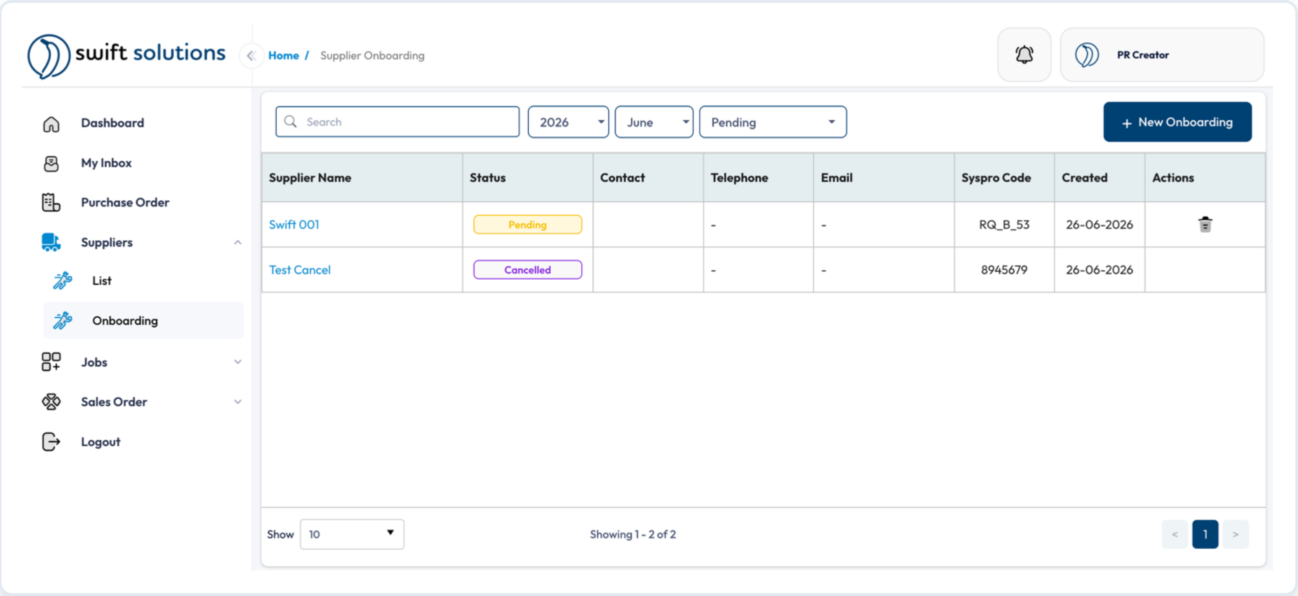
Direct SYSPRO posting

Approved suppliers are created directly in SYSPRO, removing re-keying and the errors it causes.

01

ONBOARDING REGISTER

A single, live view of every onboarding



Track each supplier moving through onboarding in one register — status, contact, SYSPRO code and creation date in a single line. Filter by year, month and status, or initiate a new onboarding directly.

02

GUIDED VALIDATION

The system flags every outstanding requirement

On opening a supplier, a Pending Details panel itemises exactly what remains — telephone, branch, terms code, bank, currency, area, supplier class and mandatory documents. A supplier cannot be submitted until every item is resolved.

03

SUPPLIER DETAILS

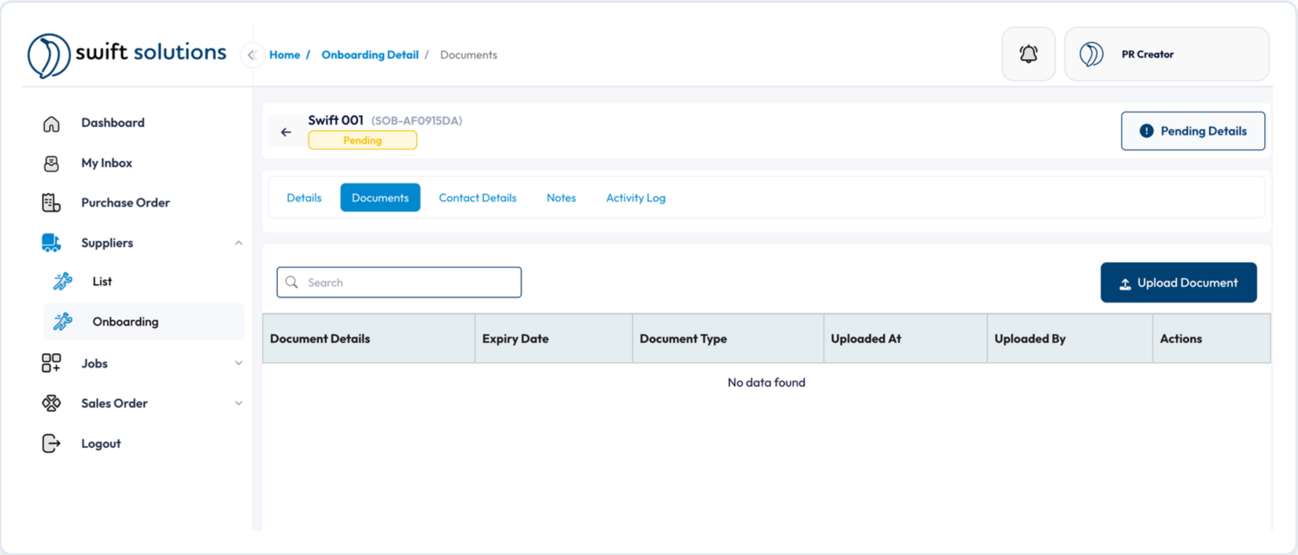
Complete the record; the checklist clears in real time

As required fields are captured, items fall away from the Pending Details panel. Once all information is in place, only the mandatory documents remain — a clear, contracting checklist all the way to ready.

04

DOCUMENT CAPTURE

Centralised capture of every supporting document

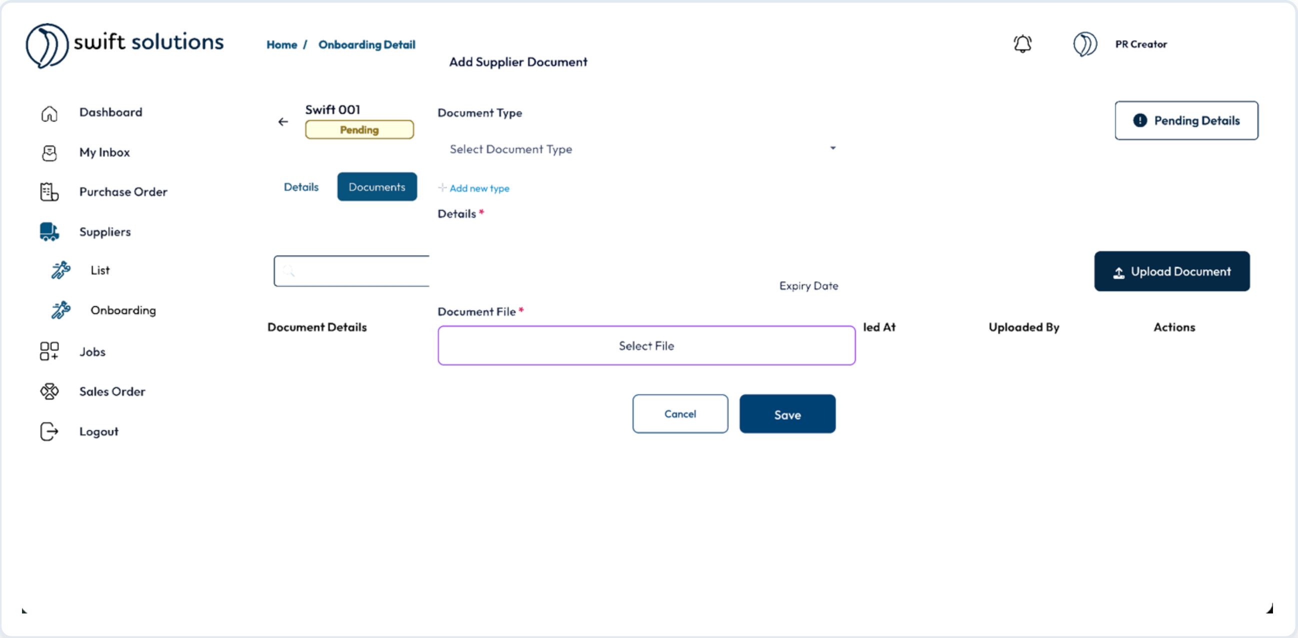


With details complete, the Documents tab becomes the home for every required file — bank letters, BEE and CIDB certificates and more — each captured against the correct supplier with a full upload history.

05

DOCUMENT CONTROL

Typed, mandatory and expiry-aware uploads

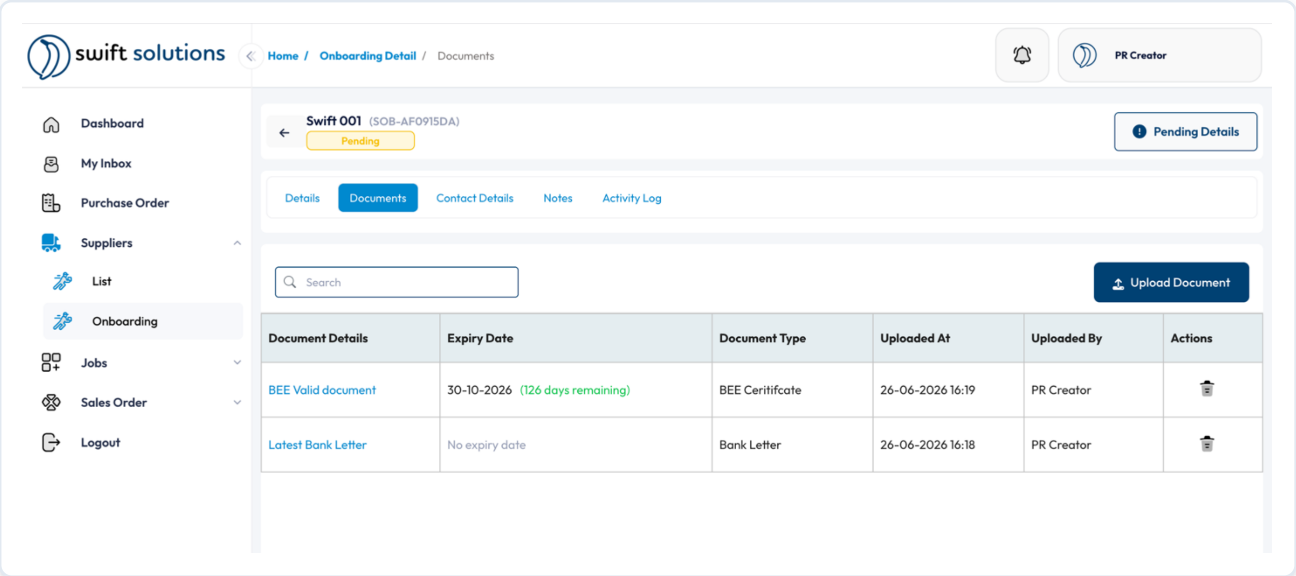


Every upload is tagged with a Document Type so mandatory requirements are satisfied automatically, with an optional expiry date for time-sensitive certificates. New categories can be added on the spot.

06

DOCUMENT REGISTER

A complete, auditable document trail

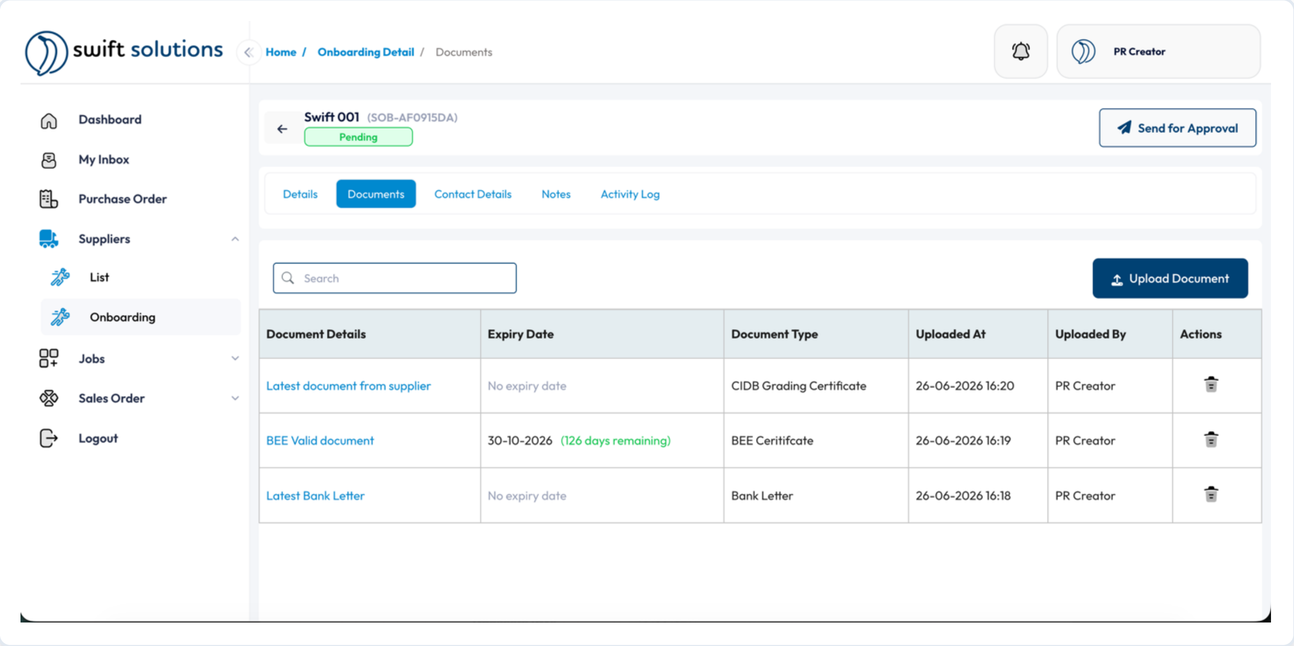


The register records each document, its type, who uploaded it and when — with a live countdown on anything that expires, so renewals are never missed.

07

READY FOR APPROVAL

Validated, compliant and ready to submit

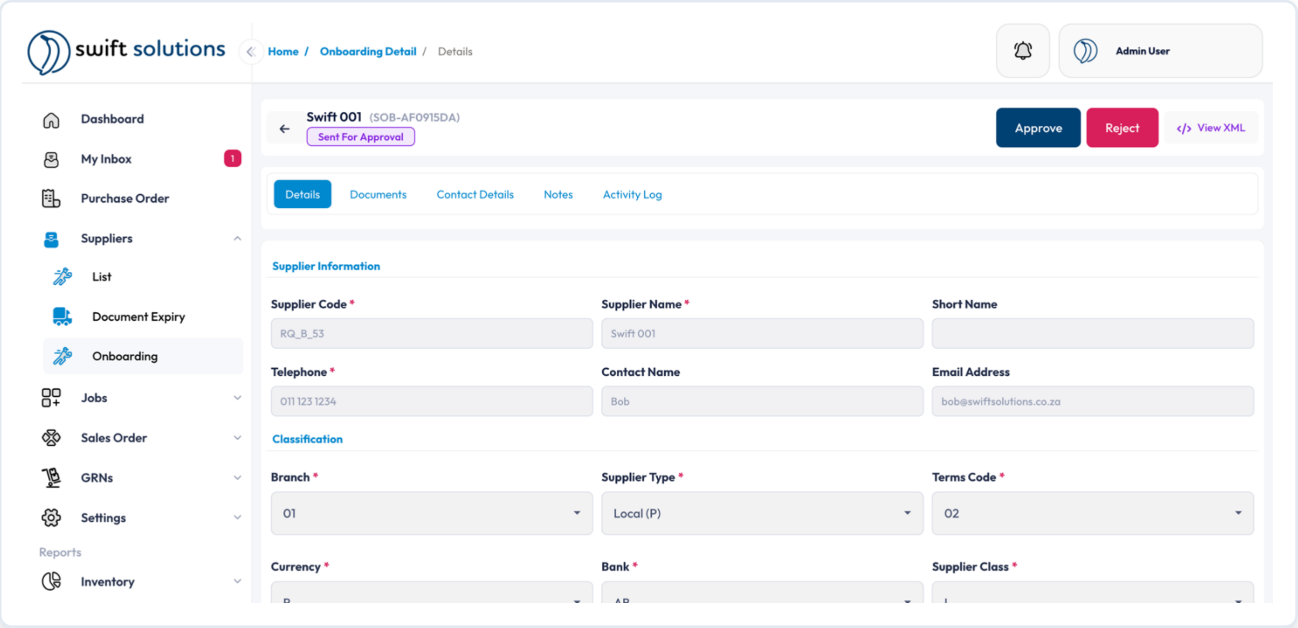


Once all mandatory documents are in place the status turns green and a Send for Approval action appears — an unambiguous signal that the supplier is complete and ready to proceed.

08

APPROVAL & POSTING

Role-based approval, posted directly into SYSPRO



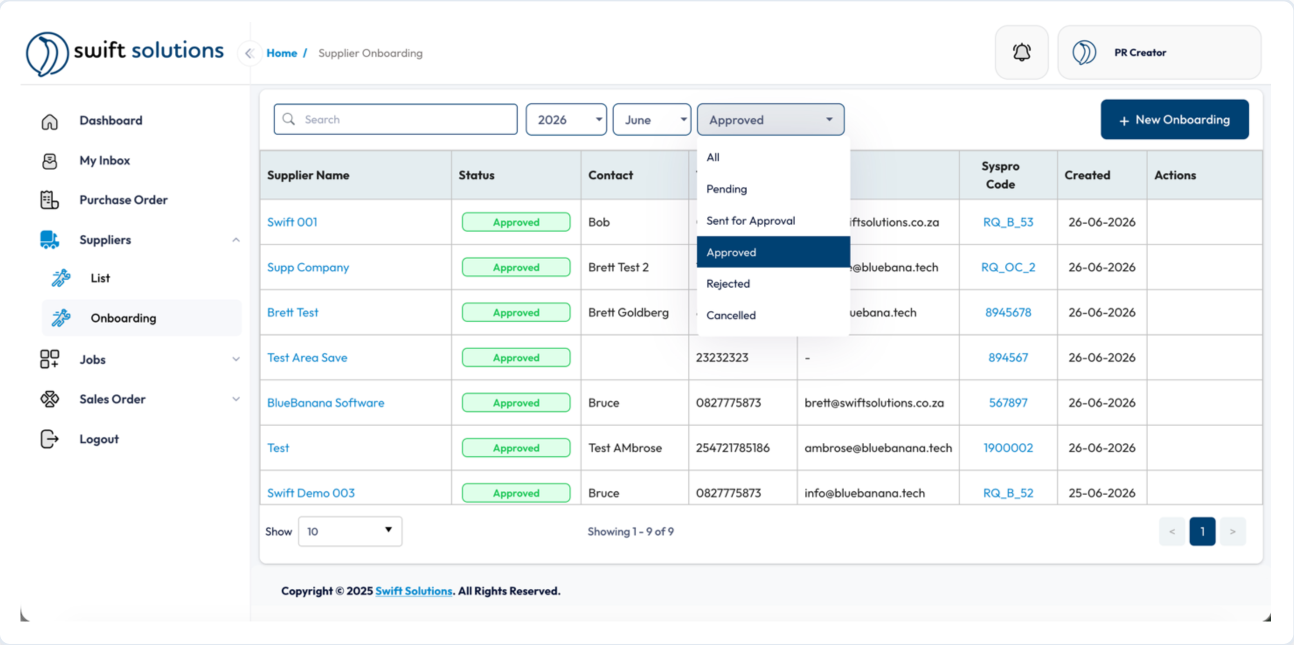
The authorised approver is notified by email and in-app inbox. They review the full record and either approve and post the supplier straight into SYSPRO, or reject it with a mandatory comment — so nothing advances unexplained.

09

OVERSIGHT

Full visibility across every workflow state

Approved suppliers — with contact, SYSPRO code and audit trail — sit alongside every other status in one searchable register, giving the team a single, dependable source of truth.



ONE GOVERNED WORKFLOW

From capture to SYSPRO — every supplier, the same controlled way.

Guided validation removes the guesswork, document compliance keeps you audit-ready, role-based approval keeps it accountable, and direct SYSPRO posting removes the re-keying. The result is a supplier base you can trust.

Pending | Sent for Approval | Approved | Rejected | Cancelled

Fully integrated into your SYSPRO ecosystem

syspro

Ready to streamline supplier onboarding?

www.swiftsolutions.co.za · demo@swiftsolutions.co.za

swift solutions