



SYS-PRO-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



CAPABILITY OVERVIEW
SUPPLIER ONBOARDING MODULE

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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.

The screenshot shows the 'Supplier Onboarding' page in the Swift Solutions application. The interface includes a sidebar with navigation links: Dashboard, My Inbox, Purchase Order, Suppliers, List, Onboarding (highlighted), Jobs, Sales Order, and Logout. The main content area features a search bar, filters for year (2026), month (June), and status (Pending), and a '+ New Onboarding' button. Below these is a table with columns: Supplier Name, Status, Contact, Telephone, Email, Syspro Code, Created, and Actions. The table contains two entries: 'Swift 001' with a 'Pending' status and 'Test Cancel' with a 'Cancelled' status. The bottom of the interface shows a 'Show 10' dropdown and a pagination indicator 'Showing 1 - 2 of 2'.

Supplier Name	Status	Contact	Telephone	Email	Syspro Code	Created	Actions
Swift 001	Pending		-	-	RQ_B_53	26-06-2026	
Test Cancel	Cancelled		-	-	8945679	26-06-2026	

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.

The screenshot displays the 'swift solutions' interface for 'Onboarding Detail' of 'Swift 001'. The status is 'Pending'. The left sidebar lists navigation options: Dashboard, My Inbox, Purchase Order, Suppliers, List, Onboarding, Jobs, Sales Order, and Logout. The main content area is divided into sections: 'Supplier Information' (Supplier Code: RQ_B_53, Supplier Name: Swift 001, Telephone, Contact Name) and 'Classification' (Branch: Select Branch, Supplier Type: Local (P), Currency: Select Currency, Bank: Select Bank). On the right, a 'Pending Details' panel lists requirements: Telephone is required, Branch is required, Terms Code is required, Bank is required, Currency is required, Area is required, Supplier Class is required, and Documents: 0 of 3 required (Bank Letter, BEE Certificate, CIDB Grading Certificate).

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.

swift solutions Home / Onboarding Detail

Swift 001 Pending

Details Documents Contact Details Notes Activity Log

Supplier Information

Supplier Code * RQ_B_53

Supplier Name * Swift 001

Telephone * 011 123 1234

Contact Name Bob

Classification

Branch * 01

Supplier Type * Local (P)

Currency * Bank *

Pending Details

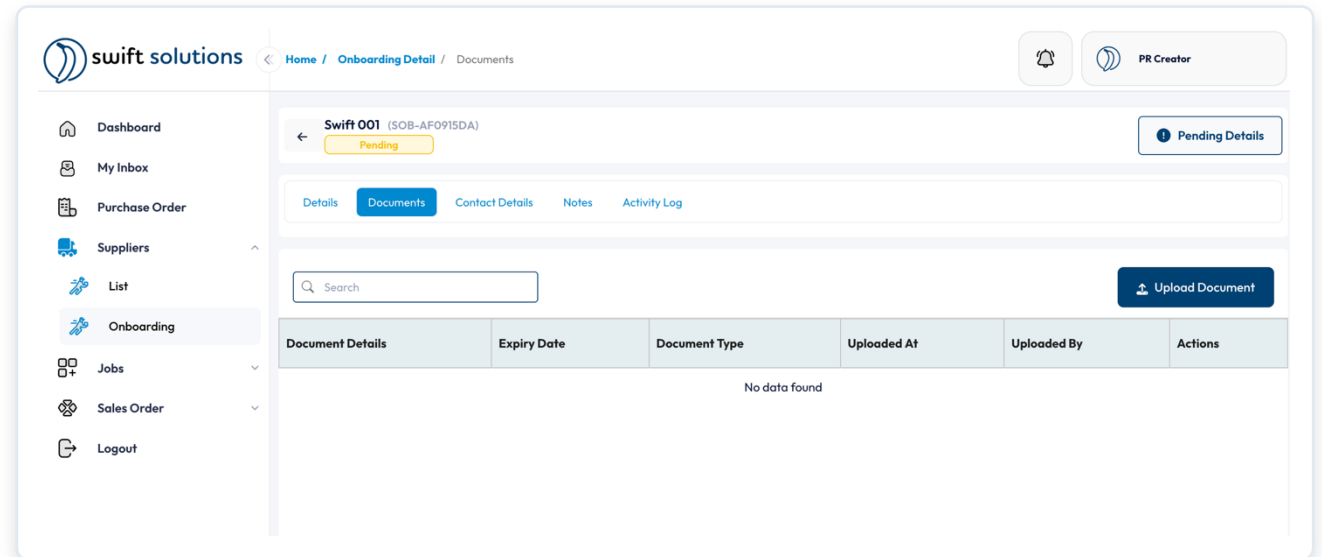
Documents: 0 of 3 required (Bank Letter, BEE Certificate, CIDB Grading Certificate).

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.

The screenshot displays the 'Add Supplier Document' interface within the Swift Solutions application. The top navigation bar includes the 'swift solutions' logo, a breadcrumb trail 'Home / Onboarding Detail', and a 'PR Creator' link. A left-hand sidebar lists various application sections: Dashboard, My Inbox, Purchase Order, Suppliers, List, Onboarding, Jobs, Sales Order, and Logout. The main content area is titled 'Add Supplier Document' and features a 'Swift 001' header with a 'Pending' status tag. Below this, there are tabs for 'Details' and 'Documents', with a link to 'Add new type'. A 'Document Type' dropdown menu is present, currently showing 'Select Document Type'. A 'Details' section with an asterisk is also visible. The 'Document File' field is marked as mandatory with a red asterisk and contains a 'Select File' button. An 'Expiry Date' field is located to the right of the file field. At the bottom right, there is an 'Upload Document' button. The bottom of the form includes 'Cancel' and 'Save' buttons. A 'Document Details' section is partially visible at the bottom left of the form area.

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.

Home / Onboarding Detail / Documents

PR Creator

Dashboard

My Inbox

Purchase Order

Suppliers

List

Onboarding

Jobs

Sales Order

Logout

Swift 001 (SOB-AF0915DA)

Pending

Pending Details

DetailsDocumentsContact DetailsNotesActivity Log

Upload Document

Document Details	Expiry Date	Document Type	Uploaded At	Uploaded By	Actions
BEE Valid document	30-10-2026 (126 days remaining)	BEE Certificate	26-06-2026 16:19	PR Creator	
Latest Bank Letter	No expiry date	Bank Letter	26-06-2026 16:18	PR Creator	

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.

The screenshot displays the 'swift solutions' interface for 'Onboarding Detail' under the 'Documents' tab. The status is 'Pending' (green). A 'Send for Approval' button is visible. Below, a table lists uploaded documents:

Document Details	Expiry Date	Document Type	Uploaded At	Uploaded By	Actions
Latest document from supplier	No expiry date	CIDB Grading Certificate	26-06-2026 16:20	PR Creator	
BEE Valid document	30-10-2026 (126 days remaining)	BEE Certificate	26-06-2026 16:19	PR Creator	
Latest Bank Letter	No expiry date	Bank Letter	26-06-2026 16:18	PR Creator	

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.

The screenshot shows the 'swift solutions' web interface. The left sidebar contains a navigation menu with items: Dashboard, My Inbox (with a red notification badge), Purchase Order, Suppliers, List, Document Expiry, Onboarding (highlighted), Jobs, Sales Order, GRNs, Settings, and Reports. The main content area is titled 'swift solutions' and shows the breadcrumb 'Home / Onboarding Detail / Details'. The header of the main area includes a notification bell, 'Admin User', and a 'Swift 001 (SOB-AF0915DA)' header with a 'Sent For Approval' status and 'Approve', 'Reject', and 'View XML' buttons. Below this is a tabbed interface with 'Details' selected. The 'Details' tab shows 'Supplier Information' and 'Classification' sections. The 'Supplier Information' section includes fields for Supplier Code (RQ_B_53), Supplier Name (Swift 001), Short Name, Telephone (011 123 1234), Contact Name (Bob), and Email Address (bob@swiftsolutions.co.za). The 'Classification' section includes fields for Branch (01), Supplier Type (Local (P)), Terms Code (02), Currency, Bank, and Supplier Class.

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.

 swift solutions

Home / Supplier Onboarding

  PR Creator

Dashboard

My Inbox

Purchase Order

Suppliers

List

Onboarding

Jobs

Sales Order

Logout

Search

2026

June

Approved

+ New Onboarding

Supplier Name	Status	Contact		Syspro Code	Created	Actions
Swift 001	Approved	Bob		iftsolutions.co.za	RQ_B_53	26-06-2026
Supp Company	Approved	Brett Test 2		@bluebana.tech	RQ_OC_2	26-06-2026
Brett Test	Approved	Brett Goldberg		uebana.tech	8945678	26-06-2026
Test Area Save	Approved		23232323	-	894567	26-06-2026
BlueBanana Software	Approved	Bruce	0827775873	brett@swiftsolutions.co.za	567897	26-06-2026
Test	Approved	Test AMbrose	254721785186	ambrose@bluebanana.tech	1900002	26-06-2026
Swift Demo 003	Approved	Bruce	0827775873	info@bluebanana.tech	RQ_B_52	25-06-2026

Show 10

Showing 1 - 9 of 9

< 1 >

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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



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