CASE STUDY | PROCUREMENT & SUPPLY CHAIN

From Vendor Paperwork to a Controlled Digital Onboarding Journey

How Kleeto Vendor Onboarding helps procurement, legal, compliance and finance teams collect, review, approve and preserve vendor documentation in one connected workflow.

At a glance

THE CHALLENGE	THE SOLUTION	THE VALUE
Scattered documents and fragmented approvals	Configurable digital vendor onboarding	Visibility, consistency and audit readiness

The business challenge

Vendor onboarding frequently involves email requests, spreadsheet trackers, incomplete document submissions and approval handoffs between procurement, legal, compliance and finance. Without a common process, teams spend time following up on missing documents, confirming who needs to approve what, and rebuilding vendor files when an audit or renewal is due.

The consequences can include inconsistent vendor experiences, limited status visibility, duplicate administrative work and difficulty producing a complete, approved set of supporting documents.

The Kleeto solution

Kleeto Vendor Onboarding digitizes the vendor accreditation process from initial document collection through configurable reviews and approvals. Vendors submit requested forms and supporting documents through a controlled digital process. Internal teams review submissions according to an assigned approval hierarchy, while procurement can track pending tasks and exceptions.

After approval, the vendor profile and associated documents are retained in Kleeto's Document Management System (DMS) for future reference. The same documented lifecycle can support subsequent document renewals and re-accreditation.

How the workflow happens

01 Initiate — Procurement teams starts an onboarding request and identifies the required vendor information and documentation.

02 Collect — The vendor supplies requested forms, certifications and supporting records through the digital workflow.

03 Review — Procurement, legal, compliance and finance reviewers evaluate submissions and return exceptions for correction.

04 Approve — Defined role-based approval levels determine whether the vendor can progress to accreditation.

05 Accredit and archive — The approved vendor profile and related documents are organized in the DMS for controlled retrieval.

06 Monitor and renew — Dashboards, notifications and document-expiry tracking support ongoing follow-up and re-accreditation.

Capabilities that make the difference

- **Automated workflows.** Standardized document requests, task assignments and approval routing eliminate manual follow-ups.
- **Centralized vendor records.** Keep the vendor's details, submissions, acknowledgments and approved documents together, rather than across disconnected folders.
- **Role-based permissions.** Differentiate vendor access from procurement, legal, compliance and finance responsibilities; restrict access when onboarding is rejected.
- **Alerts and tracking.** Give teams visibility into onboarding status, outstanding documents, pending approvals and completed activities.
- **Audit-ready records.** Retain relevant documents and a traceable digital history for internal reviews and vendor audits.
- **Renewal support.** Track expiring requirements and initiate re-accreditation where needed.

Business outcomes

- **Less administrative effort.** Teams can redirect time from repetitive chasing and filing toward supplier evaluation and strategic sourcing.
- **Stronger data integrity.** A consolidated vendor record helps limit conflicting versions and misplaced documents.
- **Consistent vendor experience.** Defined steps and expectations help create a repeatable experience across vendor categories and geographies.
- **Quicker cross-functional response.** Structured handoffs and status visibility help reduce approval bottlenecks.
- **Improved compliance oversight.** Document completeness, approved records and lifecycle tracking support stronger controls.
- **Actionable reporting.** Procurement managers can assess vendor progress, pending items and completed tasks.
- **Scalability.** A repeatable process supports an expanding vendor base without proportionate growth in manual coordination.

Illustrative before-and-after

BEFORE: MANUAL PROCESS	AFTER: WITH KLEETO
Documents collected across email threads	Documents collected in a defined digital process
Approval ownership unclear	Review roles and approval hierarchy configured
Status checked by repeated follow-ups	Pending and completed actions visible on dashboards
Files recreated for audits or renewal	Approved records retained and retrievable in the DMS

What to measure after rollout

Organizations can assess the impact using median time from vendor request to approval, percentage of complete first submissions, number of approval follow-ups, overdue requests, document-expiry exceptions, and time required to retrieve a full vendor file for audit. These are suggested KPIs, not claimed customer results.

The takeaway

Vendor onboarding is more than gathering paperwork. By bringing vendor submissions, cross-functional approvals, secure document management and renewal tracking into a connected process, Kleeto helps organizations build a more reliable foundation for procurement operations and vendor compliance.

Explore Kleeto: www.kleeto.in

Editorial note: This is a product-led, illustrative case study based on the supplied module description and Kleeto's public website. No named customer deployment, quantified outcomes or customer endorsement is asserted.