



Vendor Onboarding Automation with IFS ERP Integration

Streamlining Compliance, Data Accuracy, and Operational Efficiency
through Esker API Integration

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Author: Sri Krishna Aditya Kurapati

Table of Contents

Contents

Executive Summary3

Background / Challenge4

Solution / Approach5

Flow Chart.....6

Results / Metrics7

Lessons Learned / Best Practices8

About ESS.....9

Executive Summary

The client is a national leader in the door, dock, and security industry, dedicated to improving the safety, security, convenience, and aesthetics of buildings across the communities it serves. The client faced a critical operational bottleneck: manually validating and onboarding hundreds of vendors into their IFS ERP system. This labor-intensive process consumed valuable time and introduced risks of human error and compliance gaps.

To achieve digital transformation, the client partnered with Enterprise Software Solutions Inc. (ESS), an IFS Gold Partner. ESS proposed integrating Esker, a third-party vendor management platform, directly into IFS using custom API integrations. By automating vendor validation and data synchronization, the collaboration eliminated manual entry, ensured compliance, and empowered the client to focus on scaling service delivery. This innovative solution transformed vendor management from a manual chore into a strategic advantage, enabling the organization to replace outdated workflows with agile, integrated solutions.

Background / Challenge

As a national provider of dock and door services, the client relies on a vast network of vendors to deliver seamless solutions. The core challenge was the manual validation and onboarding of vendors into their IFS ERP system, which had become a critical pain point.

Specific challenges included:

- **Meticulous Manual Checks:** Each vendor required meticulous administrative checks for compliance, insurance, and contractual terms.
- **Time Consumption:** This process consumed hours of administrative work and resulted in delayed project timelines.
- **Escalating Risks:** With hundreds of vendors to manage, the client faced escalating risks of data entry errors, inconsistent compliance, and operational bottlenecks.

To address these issues, the transformative goal was set: integrating Esker with IFS via custom API integrations to automate vendor validation, streamline data synchronization, and eliminate manual entry. This aimed to create a seamless, error-free process, ensuring only pre-vetted, compliant vendors were onboarded into the system, thereby providing real-time accuracy and scalability.

Solution / Approach

ESS Inc., leveraging its expertise in IFS integrations and API-driven solutions, designed an end-to-end automation framework to eliminate manual bottlenecks, transforming a fragmented workflow into a seamless, error-proof system by combining Esker's vendor validation with IFS ERP's extensibility.

The End-to-End Automation Workflow involved three main steps:

1. Validation & Data Capture:

- Esker pre-validates vendors for compliance, insurance, and contractual terms.
- Esker then generates an XML file and uploads it to a secure SFTP server.
- ESS's custom API integration automatically retrieves the XML, processes the data, and stages the validated vendor data in a centralized database.

2. IFS Integration:

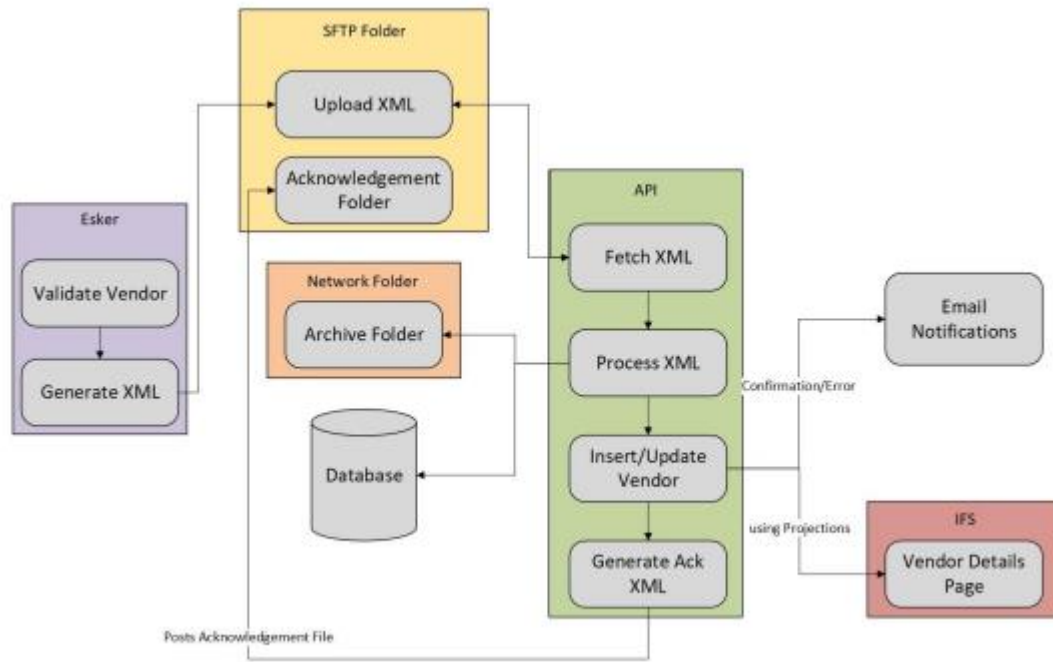
- ESS used IFS Projections to map XML data fields directly to IFS vendor records, ensuring seamless creation or updates without manual intervention.
- **Business Logic Handling:**
 - **New Vendors:** They are auto-inserted into IFS with standardized terms, payment methods, and compliance flags.
 - **Existing Vendors:** The system detects duplicates via Vendor Number and triggers updates, ensuring data consistency.

3. Real-Time Communication:

- Upon successful IFS integration, the system auto-generates emails to the desired personnel containing vendor details, warnings (e.g., missing data), and direct links to the IFS vendor page.
- An acknowledgment XML is pushed back to Esker's SFTP, confirming completion and archiving the records locally for audit trails.

ESS's role involved developing custom APIs to bridge Esker, the SFTP, and IFS, ensuring real-time syncing. They also engineered fail-safes for edge cases, such as incomplete XML data or IFS connection drops.

Flow Chart



Results / Metrics

Results / Metrics

The integration delivered significant proof points and strategic impact, enhancing efficiency and compliance:

Metric	Result
Vendor Onboarding Time	70% Faster Onboarding (reduced vendor setup time from 45+ minutes to under 10 minutes per vendor)
Data Integrity	Zero Manual Errors (Automated validation and IFS projections eliminated data entry mistakes)
Compliance	100% compliance achieved through automated validation. Audit Readiness established via centralized XML archives and acknowledgment trials, simplifying compliance reporting

Additional Benefits Achieved:

- **Effortless Scalability:** The system can automatically manage growing vendor networks without added complexity, ensuring smooth operations as new partners join daily.
- **Faster Vendor Onboarding:** Vendor integration is simplified, reducing setup time and delays.
- **Reduced Administrative Work:** Manual scheduling, data entry, and communication errors are eliminated, allowing teams to focus on strategic tasks.
- **Consistent Service Quality:** Reliability and speed are maintained across all projects, even as demand increases.
- **Adaptability to Market Changes:** The solution allows the client to quickly adjust to surges in vendor volume or customer needs.

Lessons Learned / Best Practices

Key challenges were overcome through strategic implementation, resulting in valuable lessons learned:

Overcoming Technical Challenges:

- **Data Mapping Complexity:** ESS resolved significant mismatches in data structure (e.g., address formats and compliance fields) by aligning Esker's complex XML schema directly with IFS vendor tables.
- **Fail-Safes Implementation:** ESS engineered fail-safes specifically for edge cases, such as incomplete XML data or IFS connection drops, ensuring system resilience.

Process and User Adoption Best Practices:

- **User Adoption:** ESS trained the client's team on the new workflow, emphasizing the specific Esker-to-IFS handoffs and exception handling processes.
- **Maintaining ERP Integrity:** Utilizing IFS Projections was crucial, as it enabled bulk data imports while maintaining necessary validation rules and ERP integrity.
- **Streamlined Communication:** Using customizable email templates and document management APIs streamlined the internal communication process.

Future Planning & Scalability:

- The future focus is on preparing the business for the rapid expansion of local vendor markets.
- By streamlining vendor onboarding and centralizing communication, the automated systems simplify processes even as more vendors join daily, eliminating repetitive tasks, reducing errors, and keeping projects on track as demand surges.

About ESS

Enterprise Software Solutions Inc. (ESS) is a premier enterprise resource management (ERP) implementation and support company, recognized for delivering successful projects across **manufacturing, distribution, and service** verticals for over **15 years**.

As a dedicated **IFS Gold Partner**, ESS specializes in comprehensive ERP implementation and migration services across **manufacturing, construction, and service** sectors.

Core Services and Expertise

ESS offers complete, end-to-end ERP services, including:

- Full-cycle ERP implementation — from IFS Cloud licensing and customization to deployment support across service, manufacturing, and finance modules.
- Post-implementation support and managed services.
- Seamless third-party integration using APIs and middleware.
- Robust data migration and transformation solutions.

With **over 50 years of combined team experience**, ESS has successfully implemented and customized ERP systems for industries including **service, engineering, manufacturing, and distribution**. ESS also has deep expertise in **Epicor P21 ERP** implementation.

Technical Proficiency

ESS is widely known for its ability to:

- Bridge legacy and modern ERP platforms — synchronizing systems like IFS and Baan.
- Leverage deep technical knowledge in **RESTful APIs** and **IFS customization**.
- Develop proprietary extensions around **Microsoft, SAP, BAAN**, and **IFS** technologies.
- Enable **predictive maintenance** through IFS ERP implementations.

Mission and Focus

ESS's mission is to reduce client risk by ensuring **flawless, on-time delivery** through proven experience, technical innovation, and proprietary extensions.

We help organizations overcome challenges such as:

- Growth bottlenecks and scalability limitations.
- Risks from end-of-life or unsupported legacy systems.
- Manual, error-prone customer integrations.
- Rising operational costs from outdated technologies.

By combining strong industry expertise with modern ERP innovation, **ESS ensures every client's investment delivers a long-term strategic advantage**.

Global Presence

ESS operates globally, with offices located in **Kansas (USA)** and **Hyderabad (India)**.