



Elevate

Powered by EDI Support LLC

Beginner-Friendly EDI Implementation Checklist



Step 1: Define Your EDI Goals

- List your business drivers (e.g., selling to Amazon, Walmart, Chewy, etc.)
 - Identify which documents are required (POs, invoices, ASNs, etc.)
 - Decide how hands-on you want to be (fully managed vs hybrid vs in-house)
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Step 2: Gather Partner Requirements

- Collect EDI guidelines from each trading partner
 - Note required documents, formats, and communication methods (AS2, SFTP, VAN, API)
 - Identify each partner's testing process and deadlines
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Step 3: Choose Your EDI Platform/Provider

- Evaluate cost models (per partner, per transaction, flat subscription)
 - Confirm ERP integration options (QuickBooks, NetSuite, Acumatica, etc.)
 - Ask about onboarding time and ongoing support SLAs
 - Ensure provider handles compliance updates automatically
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Step 4: Plan Document Flow

- Map out how EDI will integrate with your business systems
 - Example: ERP ↔ EDI platform ↔ Trading partners
 - Document which team (internal or provider) handles mapping
 - Identify any manual processes you want to automate
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Step 5: Set Up & Test Internally

- Build and validate mappings for required document types (850, 810, 856, etc.)
 - Run sample transactions internally before involving partners
 - Verify error handling and acknowledgment (997s) setup
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Step 6: Test with Trading Partners

- Schedule testing windows with each partner's EDI team
 - Exchange all required document types in staging
 - Fix errors, resubmit, and confirm successful validation
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Step 7: Go Live (Production)

- Switch validated connections to production

- Start with 1–2 partners first (phased rollout)

 - Monitor transactions daily for errors during the first 2–3 weeks
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Step 8: Monitor & Maintain

- Set up alerts for failed transactions
 - Review logs regularly for anomalies
 - Ensure your provider (if managed) handles partner updates
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Step 9: Plan for Growth

- Add new trading partners as your business expands
 - Automate more processes (e.g., custom packing slips, UCC labels)
 - Regularly review costs to ensure no hidden fees sneak in
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Step 10: Support & Compliance

- Confirm your provider offers real human support (not just tickets)
- Track SLAs (response within 2 hours, resolution within 48 hours)
- Ensure SOC 2 and security compliance are documented

Pro tip for first-timers: Use a phased approach. Don't onboard all trading partners at once. Start with your biggest revenue partner, learn the flow, then scale up.