EDI ONBOARDING BRIEF

Small Business Implementation Snapshot

Use this document to align your internal team and EDI provider before onboarding begins.

1. Company Overview

- Company Name: _____

- Primary Contact: _____

- EDI Contact: _____

- Warehouse Location(s): _____

- Estimated Monthly Order Volume: _____

2. Trading Partners to Onboard

Trading Partner	Contact	Required Documents	Certification Required	Priority

3. Required EDI Documents

Check all that apply:

☐ 850 Purchase Order

☐ 855 Order Acknowledgment

☐ 856 Advance Ship Notice

☐ 810 Invoice

☐ 997 Functional Acknowledgment

☐ 846 Inventory

☐ 940 Warehouse Order

☐ 945 Warehouse Shipping Advice

☐ Other: _____

4. Target Timeline

- EDI Kickoff Date: _____

- Testing Start Date: _____

- Target Go Live Date: _____

- Retailer Deadline (if provided): _____

Risk Considerations:

- Seasonal demand spikes: Yes / No

- Product launch alignment? _____

- Internal staffing constraints? _____

5. System Landscape

Primary ERP / Accounting System:

☐ Acumatica
☐ NetSuite
☐ Acumen
☐ Sage
☐ QuickBooks
☐ Other: _____

Supporting Systems:

☐ WMS
☐ TMS
☐ Shipping Software
☐ eCommerce Platform
☐ 3PL Integration

Integration Method:

☐ Direct API
☐ Flat File Import
☐ Manual Upload
☐ Custom Integration

Data Considerations:

- Are SKUs standardized? _____

- Are units of measure consistent? _____

- Are ship-to codes clean and documented? _____

6. Connectivity Requirements

☐ AS2
☐ SFTP
☐ VAN
☐ API

Production Endpoint Known?
☐ Yes
☐ No

Certificates Available?
☐ Yes
☐ No

7. Testing Plan

- Number of test scenarios required per partner:_____

- Partial shipment testing required? _____

- Multiple carton ASN testing required? _____

- Expected certification turnaround time: _____

Internal Test Owner:
EDI Provider Test Owner:

8. Go Live Readiness Checklist

Before production activation, confirm:

☐ Production credentials configured
☐ Monitoring enabled
☐ Escalation contacts documented
☐ First live order validation plan defined
☐ ASN timing process confirmed
☐ Invoice timing confirmed

9. Post Go-Live Monitoring Plan

- Who monitors daily transactions? _____

- What triggers escalation? _____

- How quickly must ASN failures be corrected? _____

- How are chargebacks tracked? _____