Elevate

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EDI Testing Checklist for Small Businesses

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Use this checklist to prepare for EDI testing, reduce avoidable delays, and make sure your team is truly ready for go-live.

1. Project and partner readiness

- [ ] We have the latest trading partner implementation guide
- [ ] We know which EDI documents are required for testing
- [ ] We know which communication method is required (AS2, SFTP, VAN, etc.)
- [ ] We understand whether labeling, packing slip, or carton-level requirements apply
- [ ] We know what test scenarios the trading partner expects
- [ ] We know what sign-off is required before go-live
- [ ] One person on our side owns follow-up and keeps testing moving

2. Internal business readiness

- [ ] Our team understands how orders move through our business today
- [ ] We know where inbound EDI orders should land internally
- [ ] We know what triggers outbound shipment and invoice documents
- [ ] We have confirmed who is responsible for order, shipping, invoicing, and testing coordination
- [ ] We have a process for reviewing issues and confirming fixes

3. Data readiness

- [ ] Customer and ship-to data is clean
- [ ] Item numbers match what the trading partner expects
- [ ] Units of measure are correct and consistent
- [ ] Required shipping data is available
- [ ] Invoice data is accurate and complete

- ☐ Internal reference fields needed for EDI are populated correctly

4. Document readiness

- ☐ The 850 Purchase Order can be received and validated
- ☐ The 855 Purchase Order Acknowledgment is configured if required
- ☐ The 856 Advance Ship Notice can be generated with the right shipment details
- ☐ The 810 Invoice can be generated with the right billing information
- ☐ The 997 Functional Acknowledgment is enabled where needed

5. Connectivity and mapping readiness

- ☐ Connectivity has been configured correctly
- ☐ Test documents can be sent and received successfully
- ☐ Required fields and segments are mapped correctly
- ☐ Partner-specific qualifiers, codes, and references are in place
- ☐ We have validated both syntax and business-level expectations
- ☐ We know how to identify whether an issue is mapping, data, workflow, or partner-related

6. End-to-end workflow readiness

If you don’t have an ERP or a backend system, use this testing workflow below:

- ☐ We have confirmed that the trading partner can send test documents to our EDI platform/provider successfully
- ☐ We have confirmed that our EDI platform/provider can send test documents back to the trading partner successfully
- ☐ Required communication methods are configured correctly
- ☐ Inbound test documents are being received without transmission issues
- ☐ Outbound test documents are being delivered successfully
- ☐ Required document maps are in place for the trading partner
- ☐ Partner-specific codes, qualifiers, and references have been configured correctly

- ☐ We have confirmed that documents are being translated correctly at the EDI platform level
- ☐ We have reviewed and resolved any syntax or validation errors returned during testing
- ☐ We know whether the trading partner has approved platform-level document testing

If you have an ERP or an Accounting System or a Warehouse Management System that is integrated with your EDI platform then, this is how the usual flow is:

a) **Inbound flow: Trading Partner → EDI provider/platform → ERP or internal system**

b) **Outbound flow: ERP or internal system → EDI provider/platform → Trading Partner**

- ☐ We have tested inbound document flow from the trading partner through our EDI provider into our ERP or internal system
- ☐ We have confirmed that inbound documents create the correct internal transactions
- ☐ We have tested outbound document flow from our ERP or internal system through the EDI provider back to the trading partner
- ☐ We have confirmed that shipment and invoice activity triggers the correct outbound EDI documents
- ☐ We have validated that data stays accurate as it moves between systems
- ☐ We have tested the full transaction flow, not just whether a file was sent or received
- ☐ We know where issues are occurring if something fails: trading partner, EDI provider, mapping, ERP, or internal workflow
- ☐ We are confident the process works in both directions before go-live

7. Partner testing readiness

- ☐ We have completed all required partner test scenarios
- ☐ We have reviewed and corrected failed test results
- ☐ Re-testing has been completed after fixes
- ☐ We are tracking open issues clearly

- ☐ We are not relying only on ticket replies without oversight
- ☐ We know whether the trading partner has formally approved our setup

8. Go-live readiness

- ☐ Required testing is complete
- ☐ Partner sign-off has been received
- ☐ Internal users know what to expect on day one
- ☐ We know who will monitor the first live transactions
- ☐ We know what to do if a production issue appears
- ☐ We are confident the setup works operationally, not just technically

9. Post-go-live monitoring

- ☐ We have a plan to monitor the first live orders
- ☐ We have a plan to monitor outbound documents after go-live
- ☐ We know who will check acknowledgments and partner responses
- ☐ We know how issues will be escalated quickly
- ☐ We are ready to catch errors early before they create chargebacks or delays

Need help getting through EDI testing or have questions?

If this checklist surfaced gaps in your document flow, partner readiness, or go-live process, Elevate team can help you manage EDI testing with more clarity and less back-and-forth.

Talk to our team about your EDI setup→