



1-min Retail EDI Compliance Readiness Checklist

SECTION 1: Basic Readiness

- Do you have at least one confirmed retail trading partner who is asking you to be EDI compliant with their requirements?
- Do you understand their EDI requirements and routing guide?
- Do you know which transaction sets are required (850, 855, 856, 810)?

SECTION 2: System Readiness

- Do you have an ERP or order management system in place?
- Can your system integrate with EDI (API, CSV, or flat file)?
- Is your product, pricing, and customer data clean and consistent?

SECTION 3: ASN Readiness Biggest Chargeback Risk

- Can you generate an ASN (856) with carton-level detail?
- Are your shipment structures aligned with your warehouse operations?
- Can you send ASNs before the shipment leaves your facility?

Note: Most retailer chargebacks stem from ASN errors or missing ASNs. This section is critical.

SECTION 4: Testing Readiness

- Have you reviewed sample EDI files from your trading partner?
- Do you understand what "passing testing" actually means for your retailer?
- Are you testing end-to-end — not just the EDI layer?

SECTION 5: Operational Alignment

- Are your warehouse and fulfillment teams aligned with EDI workflows?
- Do you know who will own EDI internally?
- Do you have a process for handling errors or transmission failures?

SECTION 6: Risk & Cost Awareness

- Do you understand what chargebacks are and how they're triggered?
- Do you know which errors your retailer penalizes?
- Do you know your total EDI costs — setup, monthly, and support?

SCORING

Count your checkmarks:

- **0-5: You need a fully managed EDI partner:** You're early in your EDI journey and that's okay. The risk of doing it alone at this stage is high with chargebacks, failed testing, and delays are common. A fully managed provider like Elevate handles everything for you at an [affordable EDI pricing](#) so you can focus on your business.
- **6-12: You need hands-on EDI support:** You have some pieces in place but gaps remain especially in testing and operations. A fully managed EDI provider with real human support (not just a help desk ticket) will save you significant time and money getting across the finish line.
- **13-18: You're in good shape with minimal help needed from an EDI provider:** You've done your homework. Even so, retail EDI has enough moving parts that having an expert in your corner during onboarding and production pays for itself fast. If your retailer/trading partner is offering a web portal, you should be able to use it with no problem to exchange purchase orders and invoices.

Need Help Deciding on Next Steps?

Talk to one of our EDI experts to know what's the best way to proceed for your situation

[Schedule Free Consultation](#)→