



ERP & EDI Readiness Checklist for SMBs

Before You Automate, Make Sure Your Processes Are Ready

Many ERP and EDI projects run into delays because businesses start connecting systems before they fully understand how their processes work today. Use this checklist to identify gaps before beginning an ERP and EDI integration project.

Business Process Readiness

1. Order-to-Cash Process

- ☐ We can clearly explain how orders are received today
- ☐ We know who reviews and approves incoming orders
- ☐ We have documented how orders move from entry to fulfillment
- ☐ We have documented how shipments are processed
- ☐ We have documented how invoices are generated
- ☐ We understand where manual intervention occurs today
- ☐ We know which processes we want EDI to automate

2. Exception Handling

- ☐ We have documented how pricing discrepancies are handled
- ☐ We have documented how inventory shortages are handled
- ☐ We have documented how shipment delays are handled
- ☐ We know how rejected orders are managed

- ☐ We have documented escalation procedures for exceptions

ERP Readiness

ERP Functionality

- ☐ Our ERP can support retailer-specific requirements
- ☐ Our ERP can generate shipment data
- ☐ Our ERP can generate invoice data
- ☐ Our ERP supports customer-specific pricing
- ☐ Our ERP supports inventory visibility
- ☐ Our ERP can handle multiple warehouse locations (if applicable)

Shipping and Compliance

- ☐ Our ERP can support UCC-128 labels
- ☐ Our ERP can support retailer-required packing slips
- ☐ Our ERP can support ASN creation requirements
- ☐ Our ERP can support shipment tracking information
- ☐ We understand any ERP limitations that may require customization

Team Readiness

Internal Ownership

- ☐ We have identified an ERP subject matter expert
- ☐ We have identified an EDI project owner
- ☐ Operations is involved in planning
- ☐ Accounting is involved in planning
- ☐ Warehouse teams are involved in planning
- ☐ IT resources are involved when needed
- ☐ Executive stakeholders understand project goals

Decision Making

- ☐ We know who approves process changes
- ☐ We know who approves ERP modifications
- ☐ We know who approves EDI testing sign-off
- ☐ We know who will own ongoing EDI operations after go-live

Trading Partner Readiness

Retailer Requirements

- ☐ We have retailer EDI specifications
- ☐ We understand required document types
- ☐ We understand testing requirements
- ☐ We know retailer onboarding timelines
- ☐ We have retailer contacts identified
- ☐ We have vendor numbers established
- ☐ We understand retailer chargeback policies

Integration Readiness

1. Data Flow

- ☐ We know where order data originates
- ☐ We know where shipment data originates
- ☐ We know where invoice data originates
- ☐ We understand how inventory updates occur
- ☐ We understand how customer data is maintained
- ☐ We have reviewed data quality in our ERP

1. Integration Method

- ☐ We know whether we will use APIs
- ☐ We know whether we will use CSV/XML files
- ☐ We know whether database integration is required
- ☐ We understand how data will move between systems
- ☐ We understand integration dependencies

Data Quality Readiness

- ☐ Customer records are accurate
- ☐ Item master data is accurate
- ☐ UPCs are accurate
- ☐ Pricing is accurate
- ☐ Warehouse locations are accurate
- ☐ Shipping methods are documented
- ☐ Inventory records are maintained
- ☐ Data validation procedures exist

Monitoring & Support Readiness

- ☐ We have identified who monitors EDI transactions
- ☐ We have identified who handles failed transactions
- ☐ We have escalation procedures documented
- ☐ We know who will work with trading partners during issues
- ☐ We have support expectations documented
- ☐ We understand our provider's SLA commitments

Project Readiness

1. Planning

- ☐ We have realistic project timelines
- ☐ We understand ERP dependencies
- ☐ We understand trading partner dependencies
- ☐ We understand testing timelines
- ☐ We have identified project risks
- ☐ We have identified project milestones
- ☐ We have assigned project responsibilities

2. Go-Live Readiness

- ☐ Testing has been completed successfully
- ☐ Business users have reviewed workflows
- ☐ Exception scenarios have been tested
- ☐ Monitoring is configured
- ☐ Support contacts are documented
- ☐ Internal teams are trained
- ☐ Rollback plans exist if needed

Scoring Your Readiness

50+ Checked

Strong foundation for ERP and EDI integration.

35–49 Checked

Some process, data, or project planning gaps should be addressed before implementation.

Under 35 Checked

Focus on business process mapping, ERP readiness, and project planning before starting EDI automation.

Final Question

Can your team explain how an order moves from receipt to payment without mentioning EDI?

If not, start there.

The most successful ERP and EDI integrations automate well-defined business processes. They do not create them.