



New EDI Team Training Checklist

Build an EDI Team That Can Confidently Support Your Business

Successfully implementing EDI is only the beginning. Use this checklist to train new employees, document internal knowledge, and ensure your team understands both your EDI platform and the business processes behind it.

Phase 1 — Understand Your Business

a. Company Operations

- ☐ Understand what products we sell
- ☐ Know our major customers and retailers
- ☐ Understand our order-to-cash process
- ☐ Learn how inventory flows through our business
- ☐ Know how orders become shipments
- ☐ Understand our invoicing process

b. Internal Systems

- ☐ ERP
- ☐ WMS
- ☐ Accounting System
- ☐ CRM
- ☐ Shipping Platform
- ☐ EDI Platform

Know what each system does.

Phase 2 — Learn EDI Fundamentals

- ☐ What is EDI?
- ☐ Why customers require EDI
- ☐ Benefits of EDI
- ☐ Trading Partners
- ☐ Purchase Orders
- ☐ ASNs
- ☐ Invoices
- ☐ Functional Acknowledgments
- ☐ Communications
- ☐ Mappings
- ☐ Validation
- ☐ Compliance

Phase 3 — Learn Your Documents

Understand when each document is created.

- ☐ 850 Purchase Order
- ☐ 855 Purchase Order Acknowledgment
- ☐ 856 Advance Ship Notice
- ☐ 810 Invoice

☐ 997 Functional Acknowledgment

Know:

- Who creates it
- When it's sent
- Where it comes from
- Where it goes
- Why it matters

Phase 4 — Learn Your EDI Software

- ☐ Log in
- ☐ Find transactions
- ☐ Search documents
- ☐ Read errors
- ☐ Check acknowledgments
- ☐ Monitor queues
- ☐ Review alerts
- ☐ Download raw EDI
- ☐ Review mappings

Phase 5 — Learn Your Business Processes

Walk through a real customer order.

Can you explain?

- ☐ Order received
- ☐ Sales Order created

- ☐ Picking
- ☐ Packing
- ☐ Shipping
- ☐ ASN
- ☐ Invoice
- ☐ Payment

Phase 6 — Learn Troubleshooting

Practice resolving:

- ☐ Missing PO
- ☐ Failed ASN
- ☐ Rejected Invoice
- ☐ Invalid UPC
- ☐ Wrong Pricing
- ☐ Failed Communication
- ☐ Duplicate Order
- ☐ Missing 997

Phase 7 — Know Who Owns What

- ☐ ERP Owner
- ☐ EDI Provider
- ☐ Warehouse
- ☐ Accounting

- ☐ Operations
- ☐ Retail Customer
- ☐ Internal Escalation

Final Readiness Check

A new team member should be able to answer:

- Where does an order originate?
- What happens if an ASN fails?
- Who owns retailer communication?
- Where do invoices come from?
- Who do we contact during an EDI outage?