



Trucking EDI Mandate Readiness Checklist

Your Customer Says You Need EDI. What Do You Do Next?

Receiving an EDI mandate from a shipper, broker, 3PL, or major customer can feel overwhelming, especially if your trucking company has never used EDI before. But you don't need to become an EDI expert overnight.

Use this checklist to understand **what your customer is asking for, what your current operation can support, whether you need web or integrated EDI, and what needs to happen before your compliance deadline.**

1. Understand the EDI Mandate

Before looking at providers or software, make sure you understand exactly what your customer requires.

- ☐ We know which customer/trading partner issued the EDI mandate.
- ☐ We have the customer's EDI implementation guide or specifications.
- ☐ We know the EDI compliance deadline.
- ☐ We know which EDI documents are required.
- ☐ We know whether testing/certification is required before going live.
- ☐ We know the required communication method or protocol.
- ☐ We have a technical or EDI contact at the customer.
- ☐ We understand what happens if we miss the compliance deadline.

EDI Deadline: _____

Customer/Trading Partner: _____

Customer EDI Contact: _____

2. Identify the EDI Documents You Need

Check every transaction your customer requires.

- ☐ **EDI 204** — Motor Carrier Load Tender
- ☐ **EDI 990** — Response to a Load Tender
- ☐ **EDI 211** — Motor Carrier Bill of Lading
- ☐ **EDI 212** — Motor Carrier Delivery Trailer Manifest
- ☐ **EDI 214** — Transportation Carrier Shipment Status
- ☐ **EDI 210** — Motor Carrier Freight Details and Invoice
- ☐ **EDI 322** — Terminal Operations / Intermodal Ramp Activity
- ☐ **EDI 820** — Payment Order / Remittance Advice
- ☐ **EDI 997** — Functional Acknowledgment
- ☐ Other: _____

Important: Don't assume you need every transportation EDI document. Your requirements depend on the customer and transportation workflow.

3. Map Your Current Transportation Workflow

Before automating anything, understand how your team handles the process today.

Load Tender

- ☐ How do we currently receive new loads?
- ☐ Who reviews them?
- ☐ Who accepts or declines them?

Shipment

- ☐ How do we know when freight has been picked up?
- ☐ How do we track trucks in transit?
- ☐ How are shipment status updates communicated?
- ☐ How do customers currently request shipment status?

Delivery

- ☐ How is delivery confirmed?
- ☐ Where is delivery information recorded?

Invoicing

- ☐ How are freight invoices created?
- ☐ Who sends them?
- ☐ How are payments and remittance information reconciled?

Most manual part of our current workflow:

4. Assess Your Current Technology

What systems are already running your transportation operation?

- ☐ Transportation Management System (TMS)
- ☐ ERP
- ☐ Accounting software
- ☐ Dispatch software
- ☐ GPS / fleet tracking
- ☐ Electronic Logging Device (ELD)
- ☐ Warehouse Management System (WMS)
- ☐ Customer portals
- ☐ Existing EDI platform
- ☐ Other: _____

Ask:

- ☐ Can our TMS import/export data?
- ☐ Does it support APIs?
- ☐ Can it generate CSV, XML, or flat files?
- ☐ Can shipment status information be exported?
- ☐ Can load acceptance information be captured electronically?
- ☐ Can invoice data be exported?
- ☐ Can GPS or shipment events trigger status updates?

5. Determine Your Transaction Volume

Volume can help determine whether manual web EDI is practical or whether integration makes more sense.

Approximate loads per week: _____

EDI documents per week: _____

Customers requiring EDI: _____

Expected EDI customers in the next 12 months: _____

Consider:

- ☐ Our EDI volume is currently low.
- ☐ Someone could reasonably manage transactions manually.
- ☐ Our volume is growing.
- ☐ Manual entry would create significant additional work.
- ☐ We expect additional customers to require EDI.

6. Web EDI or Integrated EDI?

Web / Non-Integrated EDI May Work If:

- ☐ We have relatively low transaction volume.
- ☐ We don't currently have a TMS suitable for integration.
- ☐ Our customer requires only a small number of transactions.
- ☐ Our team can manually manage EDI transactions.
- ☐ We primarily need to satisfy one customer's mandate.

Integrated EDI May Make More Sense If:

- ☐ We already use a TMS.
- ☐ We process a significant number of loads.
- ☐ Multiple customers require EDI.
- ☐ Employees are entering the same information into multiple systems.
- ☐ Shipment status information already exists electronically.
- ☐ We want EDI 214 status updates to be more automated.
- ☐ We want invoices generated from existing operational data.
- ☐ We expect transaction volume to grow.

Likely approach:

- ☐ Web EDI
- ☐ Integrated EDI
- ☐ Unsure — needs assessment

7. Identify Your Manual Work

Look for information your employees currently enter more than once.

- ☐ Load information
- ☐ Pickup information
- ☐ Delivery information
- ☐ Shipment status
- ☐ Location updates
- ☐ Invoice information

- ☐ Customer information
- ☐ Freight charges
- ☐ Other: _____

Ask yourself:

If this information already exists in our TMS or another system, why are we entering it again?

This is where integration may create the greatest operational value.

8. Evaluate EDI Providers

Don't choose a provider simply because you have a deadline approaching.

Ask potential providers:

- ☐ Do you support transportation EDI?
- ☐ Have you worked with trucking companies and carriers?
- ☐ Do you support our required EDI documents?
- ☐ Can you connect with our customer's EDI system?
- ☐ Do you support web EDI?
- ☐ Can you integrate with our TMS?
- ☐ Who handles EDI mapping?
- ☐ Who handles trading partner setup?
- ☐ Who communicates with our customer during testing?
- ☐ Who manages testing and certification?
- ☐ What happens when a transaction fails?
- ☐ How are errors communicated?
- ☐ What support is available after go-live?

- ☐ Can we start with web EDI and integrate later?
- ☐ What does onboarding cost?
- ☐ What are the ongoing fees?
- ☐ Are there long-term contracts?
- ☐ Are there additional trading partner or transaction fees?

9. Build Your Implementation Timeline

Don't wait until a few weeks before your customer's deadline.

Phase 1 — Requirements

- ☐ Collect customer specifications.
- ☐ Identify required documents.
- ☐ Confirm deadline.
- ☐ Understand testing requirements.

Phase 2 — Assessment

- ☐ Review current systems.
- ☐ Map existing workflows.
- ☐ Estimate transaction volume.
- ☐ Determine web vs. integrated EDI.

Phase 3 — Implementation

- ☐ Select EDI solution/provider.
- ☐ Establish trading partner connection.
- ☐ Configure required transactions.
- ☐ Build integrations if required.

Phase 4 — Testing

- ☐ Test connectivity.
- ☐ Test required EDI documents.
- ☐ Validate data.
- ☐ Complete customer certification/testing.
- ☐ Resolve errors.

Phase 5 — Go-Live

- ☐ Train employees.
- ☐ Confirm production connection.
- ☐ Begin exchanging live transactions.
- ☐ Monitor transactions closely.
- ☐ Establish support and escalation procedures.

10. Prepare Your Internal Team

Someone inside your company should understand how the EDI workflow operates, even if your provider manages the technical side.

- ☐ We have assigned an internal EDI owner.
- ☐ Dispatch understands how EDI affects its workflow.
- ☐ Operations understands the new process.
- ☐ Billing understands the EDI 210 workflow.
- ☐ Employees know how to identify failed transactions.
- ☐ Employees know who to contact when something fails.
- ☐ Employees understand which processes remain manual.

☐ Employees have been trained before go-live.

Internal EDI Owner: _____

11. Test Before Going Live

Don't assume that because a connection works, the entire business process works.

- ☐ Load tenders can be received successfully.
- ☐ Load responses can be returned successfully.
- ☐ Shipment status updates contain the correct information.
- ☐ Invoices contain the required freight details.
- ☐ Required acknowledgments are being received.
- ☐ Transactions are reaching the correct internal systems.
- ☐ Errors generate alerts.
- ☐ Our team knows how to respond to failures.
- ☐ Customer testing/certification is complete.

12. Monitor After Go-Live

EDI doesn't end when the connection goes live.

- ☐ Failed transactions are monitored.

- ☐ Missing acknowledgments are identified.
- ☐ Shipment status failures generate alerts.
- ☐ Invoice failures are investigated quickly.
- ☐ Trading partner errors are tracked.
- ☐ Employees know the escalation process.
- ☐ We periodically review whether manual work can be further automated.

13. Plan for Growth

The solution you need today may not be the solution you need three years from now.

- ☐ We can add additional customers/trading partners.
- ☐ We can add additional EDI documents.
- ☐ Our solution can handle increased transaction volume.
- ☐ We can move from web EDI to integrated EDI if needed.
- ☐ Our TMS can eventually be integrated.
- ☐ We understand the cost of adding trading partners.
- ☐ We understand the cost of increased volume.
- ☐ We aren't locked into technology that prevents future growth.

Your EDI Mandate Readiness Snapshot

- ☐ **Ready to Move Forward**

You understand your customer's requirements, know which documents you need, have evaluated your systems, and have enough time to implement and test.

☐ **Some Gaps to Address**

You understand the mandate but still need to clarify documents, systems, responsibilities, integration requirements, or testing.

☒ **Immediate Attention Needed**

Your deadline is approaching and you still don't know exactly what your customer requires, which EDI transactions are needed, or how you'll meet the mandate.

Don't start by buying software. Start by understanding the requirement.

Your 5 Questions Before Choosing an EDI Solution

If you do nothing else, answer these:

- 1. What exactly is my customer requiring?**
- 2. Which EDI documents do I need?**
- 3. When do I need to be live?**
- 4. Can my existing TMS or transportation systems provide the required data?**
- 5. Do I need web EDI today, integrated EDI, or a solution that can grow into integration later?**

Need Help Understanding Your EDI Mandate?

If a customer, shipper, broker, or 3PL has told you that your trucking company needs EDI, you don't have to figure it out alone. Review your requirements, current systems, transaction volume, and timeline before committing to a platform.

[Book a 30-Min Transportation EDI Readiness Review](#) →

