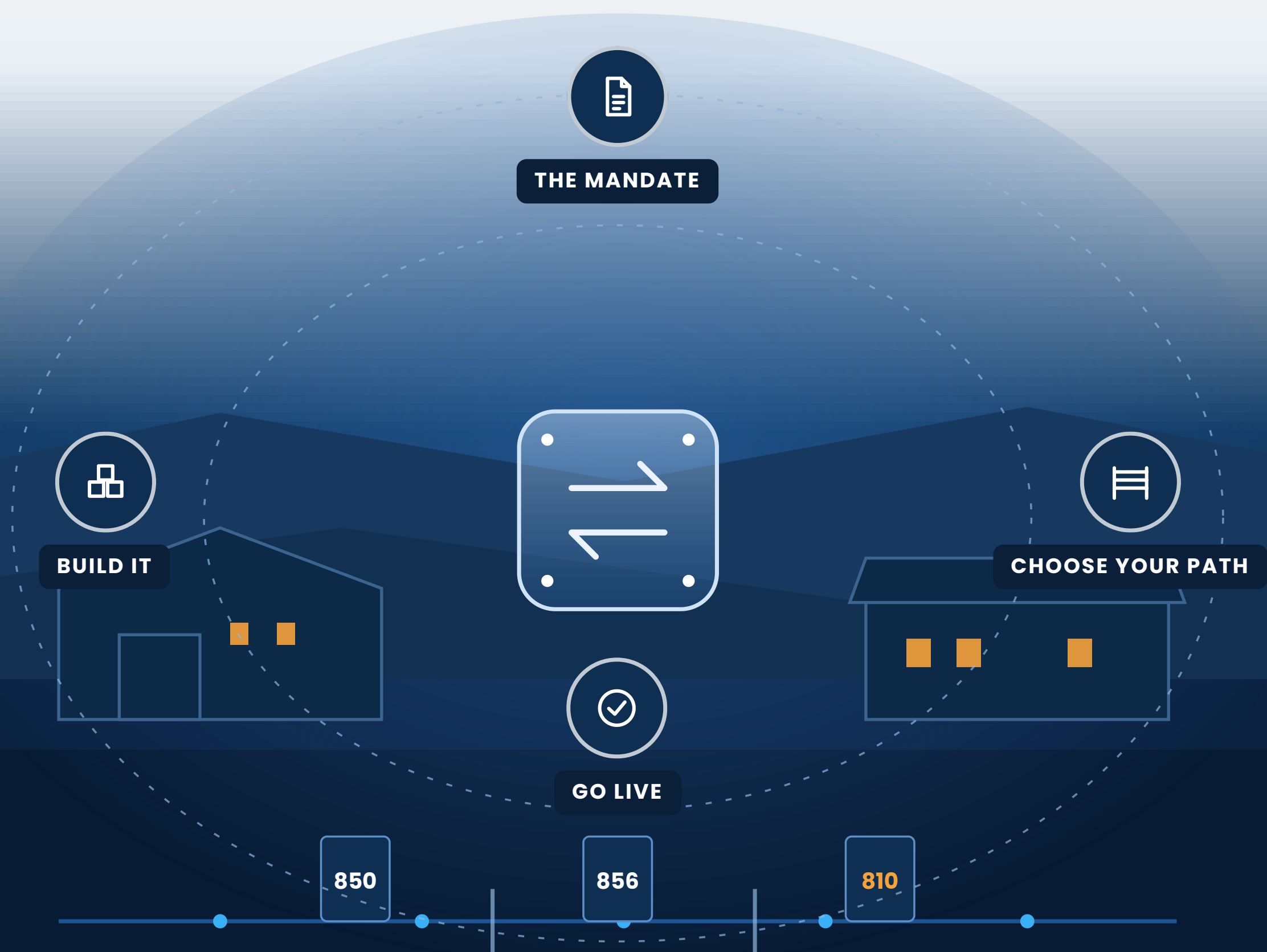


EDI Implementation Plan

How to Meet a Retailer EDI Mandate in Under Six Months



2026 IMPLEMENTATION GUIDE

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A checkpoint-driven path for a supplier with no existing EDI — from the mandate letter to a certified, compliant go-live.

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Mandate to go-live
in under six months

IMPLEMENTATION OVERVIEW

The Mandate Has a Deadline

A retailer has just told you that Electronic Data Interchange is now a condition of doing business. There is a compliance date attached, and the message underneath it is blunt: connect the way we require, by when we require it, or the orders stop. For a supplier with no existing EDI capability, that letter starts a clock — and it starts it on a discipline your team has probably never run.

This guide is the greenfield path: building EDI from zero, not migrating an existing setup. It is organised around one idea — an EDI go-live is a sequence of **checkpoints**, and each one has to pass before the next begins. Run it that way and a first-time implementation is achievable inside the five-to-seven-month window most mandates allow. Skip a gate, and a six-month plan quietly becomes a nine-month one while chargebacks accrue in the background.

The real deadline is not your go-live date. It is the retailer's certification date — and everything else has to be planned backward from it.

66%

of supply-chain transactions still run on EDI. The mandate reflects how B2B trade actually works, not a passing preference.

5–7

months is the realistic window from mandate letter to first certified transaction for a first-time implementer.

1–10%

of revenue lost to chargebacks when compliance slips — the reason the deadline is not negotiable.

How this guide is built

Four parts, mirroring the four phases of the work: understand the mandate, choose your path, build against the checkpoints, and go live — then keep it running on Monday.

The Mandate

→

Choose Path

→

Build It

→

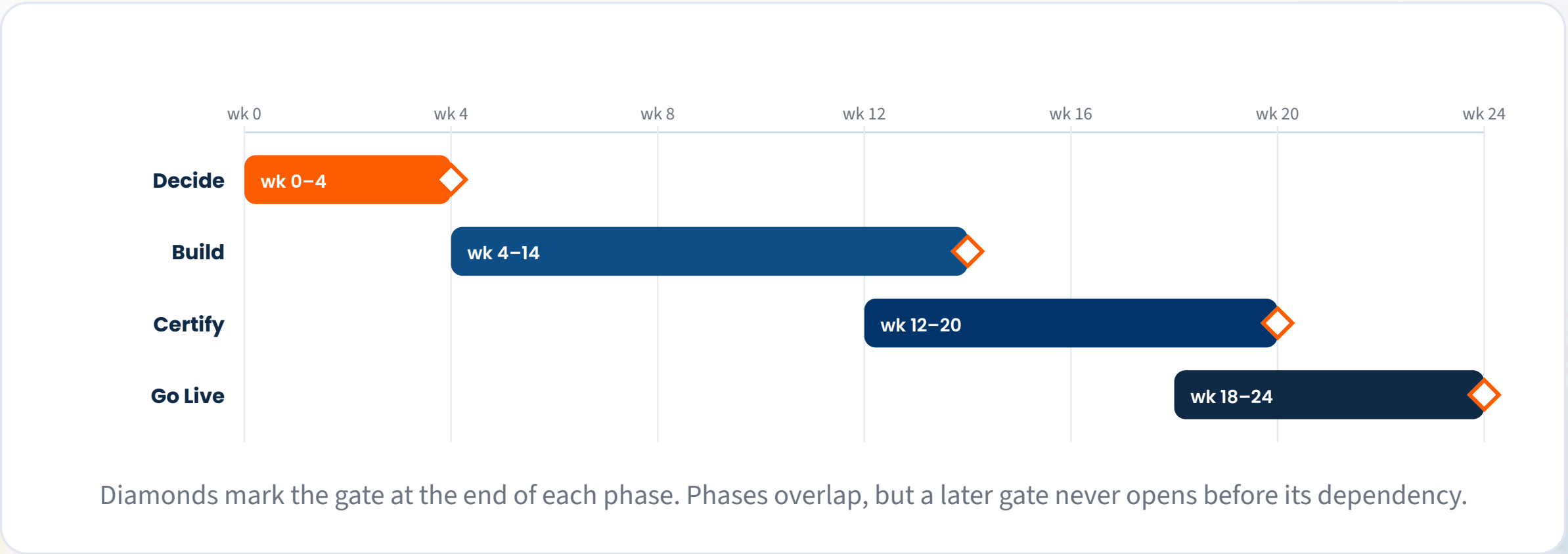
Go Live

IMPLEMENTATION OVERVIEW

The Six-Month Path at a Glance

The work divides into four phases that overlap at the edges but never change order. Testing usually begins before every map is finished, and master-data cleanup runs the whole way through — yet each phase still ends at a gate the project cannot pass on optimism alone. The timeline below is the shape most greenfield implementations take; the exact weeks flex with the retailer’s test cadence.

FIGURE 1 • A REPRESENTATIVE GREENFIELD TIMELINE



Where the weeks go

Reading the guide and cleaning master data take longer than teams expect. Mapping is well-trodden; ERP integration and 856 testing are where schedules slip.

What runs in parallel

Connectivity and certificates can be set up while maps are still being built. Master-data cleanup should start in week one and never really stops.

The buffer that matters

Almost no one certifies on the first submission. Leave room for at least one full re-test cycle before the compliance date.

PHASE BY PHASE: THE BIGGEST RISK, AND WHO OWNS IT

Phase	Where it usually slips	Who has to own it
Decide	Mis-reading what the guide actually enforces	Project owner + the person who read the guide
Build	ERP integration and dirty master data	ERP / IT, not the EDI vendor
Certify	856 rejections and repeated re-test cycles	EDI lead + operations for labels
Go Live	No one assigned to run it on Monday	Named operational owner, decided up front

PART ONE · THE MANDATE

Your Customer Made EDI a Condition of Doing Business

The mandate rarely arrives as a negotiation. It is a requirement, usually carrying a compliance date and a reference to a trading-partner specification you have not yet seen. How you read it in the first week — calmly and completely, or in a panic three weeks later — sets the tone for the whole project.

Two things are almost always misread. First, the deadline in the letter is the **go-live** date, but the date that actually governs your schedule is **certification**, which happens weeks earlier and depends on a build that is already finished. Second, the penalties are not abstract: they are real deductions and held orders that hit finance and operations, not just IT. A supplier can be technically “live” and still bleeding margin because the documents are not clean.

WHAT THE MANDATE TYPICALLY SPECIFIES

- **Required transaction sets** — often 850, 856, 810, 997
- **A communication protocol** — frequently AS2
- **Labeling standards** — GS1-128 / UCC-128 on cartons
- **A testing & certification** process to complete first
- **A compliance date** — and the penalties for missing it

WHAT HAPPENS IF IT SLIPS

- **Held purchase orders** — you cannot be shipped to
- **Chargebacks** for non-compliant documents and labels
- **OTIF penalties** tied to on-time, in-full delivery
- **Scorecard damage** that follows you across seasons
- **Delisting** — the relationship itself is at risk

YOUR FIRST WEEK, IN ORDER



PART ONE · THE MANDATE

What Non-Compliance Actually Costs

The mandate's urgency is easy to underestimate, because the cost of getting EDI wrong is designed to be invisible. Retailers do not send an invoice for a mistake — they deduct it straight from your remittance. The money shows up as a smaller-than-expected payment weeks later, by which time the shipment that caused it is long forgotten. Finance sees the shortfall; operations holds the context; nobody connects the two until someone compares invoiced revenue against what actually landed.

1–2%

of top-line revenue is the typical chargeback drain — rising to **10%** for severe or repeated non-compliance.

3%

Walmart OTIF deduction on non-compliant cases — scaled to order value, repeated across every shipment.

90 / 95%

OTIF targets — roughly 90% on-time and 95% in-full; both must be met on the same shipment.

FOUR WAYS NON-COMPLIANCE SHOWS UP AS DEDUCTIONS



OTIF penalties

Late or short deliveries — usually the largest single exposure for suppliers on a formal programme.



ASN accuracy & timing

An 856 that is late or wrong triggers deductions even when the physical shipment is correct.



Labeling & documentation

Small individual penalties, but frequent — a steady erosion of margin, carton by carton.



Invoice mismatches

An 810 that will not reconcile cleanly to its 850 and 856 is held or deducted.

Measure your own exposure

Chargeback rate =
total deductions ÷ revenue base × 100

Compare invoiced revenue against what actually landed. The gap, categorised by cause, is your real number.

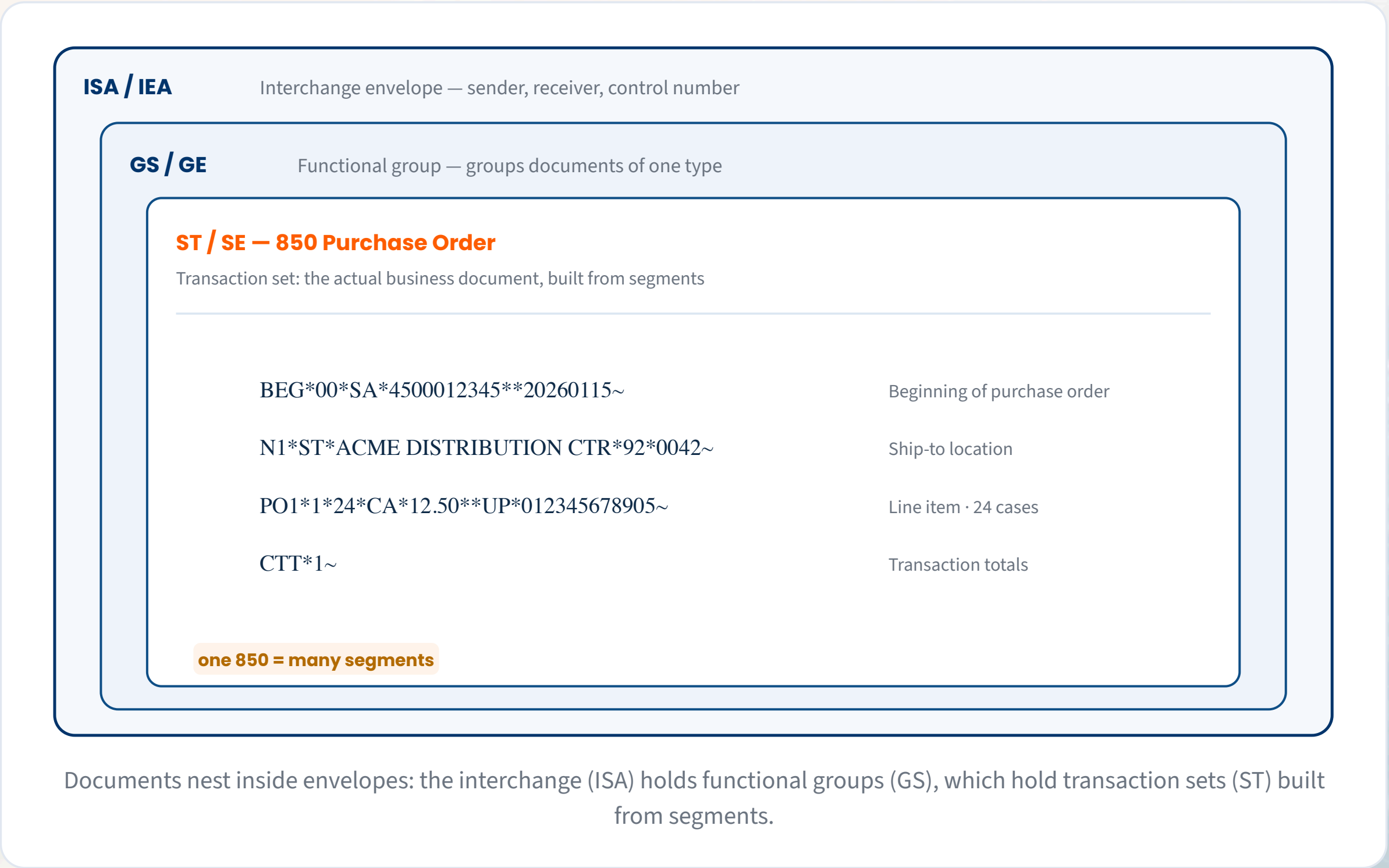
Because the 856 feeds the retailer's on-time-and-complete tracking, a delayed or inaccurate ASN can register as an OTIF failure **even when the truck arrived on time and full**. One weak document quietly drives penalties across several categories at once — which is why this guide tests the 856 harder than anything else.

PART ONE · THE MANDATE

What EDI Is — and Why It Runs Order-to-Cash

EDI is the computer-to-computer exchange of standard business documents in a format a machine can read without a human retyping anything. A purchase order leaves the retailer’s system and arrives in yours as structured data — not a PDF, not an email — wrapped in a strict, published envelope. That structure is the whole point, and the reason EDI still carries most of B2B trade: everyone agrees, in advance, exactly what each document must contain and how it must be packaged.

FIGURE 2 · THE ANATOMY OF AN EDI FILE (ANSI X12)



Four moving parts

Translate to and from X12 · **map** each field to your ERP
· **transmit** over AS2 or SFTP · **acknowledge** with a 997
so the sender knows it parsed.

Why first-timers stumble

EDI is not only IT — it touches finance and operations. A document that *sends* is not automatically *compliant*, and errors can stay invisible for weeks until a deduction appears.

PART ONE · THE MANDATE

What EDI Is Not: Why an API Won't Satisfy the Mandate

First-time implementers reach a predictable conclusion: “We have developers — we’ll just build an API.” It is the single most expensive misread of a mandate. An API is a way for two systems to talk; it is not a standardised business document, and it carries none of the trading-partner governance a retailer requires. You cannot certify an API against an EDI specification, because there is nothing standardised to certify against.

The confusion is fair — APIs and EDI both move data between companies. But they solve different problems, and a mandate is specifically an **EDI** problem. APIs shine in real time; EDI governs batch, compliance-bound documents. The right long-term answer for most suppliers is both, each used for what it does best.

EDI VS API VS JSON — DIFFERENT JOBS

	EDI	API	JSON
What it is	A business-document standard	A communication method	A data format
Governance	Trading-partner agreements	Per-provider, ad hoc	None
Timing	Batch / scheduled	Real-time request-response	Whatever the API defines
Best for	Batch B2B compliance	Real-time app-to-app	Structuring data inside APIs
Satisfies a mandate?	Yes	No	No

Where EDI wins

Standardised documents, retailer compliance, batch volume, guaranteed structure and acknowledgments (997 / 999). Roughly two-thirds of supply-chain transactions still ride on it.

Where APIs win

Real-time inventory, pricing and order status — customer-facing and internal. Most companies eventually run EDI and APIs side by side.

The trap in one line. An API can move an order between two systems, but it cannot make that order a *certifiable* 850. The retailer validates against the EDI standard — so satisfying the mandate means speaking it.

PART ONE · THE MANDATE

How to Read a Trading Partner Implementation Guide

Certification is measured against exactly one document: the retailer's implementation guide. It routinely runs to several hundred pages, and a first-time implementer opening it cannot immediately tell what is mandatory, what is optional, and what the retailer will actually reject a transaction for. Guides are long because they are exhaustive — they cover every segment, qualifier and code the retailer supports, most of which you will never use. Learning the shape, and reading it in the right order, is the first real skill of the project.

A REPRESENTATIVE STRUCTURE

- **Overview & contacts** — scope, versions, support
- **Transaction sets & versions** — e.g. 850 v4010
- **Segment & element detail** — the field-by-field spec
- **Qualifiers & code lists** — the allowed values
- **Labeling** — GS1-128 carton and pallet rules
- **Communication** — protocol, addresses, certificates
- **Testing & certification** — the steps to pass
- **Compliance & penalties** — what non-conformance costs

READ IT IN THIS ORDER

Do not start at page one. Start where the timeline risk is.

- **1 • Testing & certification** — how many clean cycles?
- **2 • Labeling** — GS1-128 is slow to get right
- **3 • Required transaction sets & versions**
- **4 • Segments, qualifiers and code lists**

Testing and labeling decide your schedule — and they are where first-timers lose the most weeks.

Treat the guide as a contract, not a manual. Anything it marks required is a pass/fail condition for certification — and the retailer's validator, not your judgement, decides whether you met it. Build a requirement tracker on day one and keep it current.

PART ONE · THE MANDATE

Mandatory, Conditional, Enforced

Every requirement in the guide falls into one of three buckets — and the third is the one that surprises people. A field can be optional in the specification yet enforced in practice, because the retailer’s system rejects transactions without it regardless of what the document technically says. You only discover that class of requirement in testing, or from someone who has been through it before. Classifying every line is unglamorous work, and it is exactly what stops an “optional” field from failing your certification in week eighteen.

Mandatory
Marked required in the spec.
Non-negotiable and pass/fail.
Build first.

e.g. PO number, ship-to, line items, UOM.

Conditional
Required only in certain situations. Map the *logic*, not just the field.

e.g. allowance/charge segments when a discount applies.

Enforced in practice
“Optional” on paper, but the validator rejects without it.
Visible only in testing.

e.g. a date qualifier the guide lists as optional.

RED FLAGS THAT DECIDE YOUR TIMELINE

- **856 / ASN structure** — the hierarchy and its tie to labels
- **GS1-128 labels** — exact barcode content and placement

- **Date & qualifier codes** — formats rejected if wrong
- **Test-cycle count** — how many clean passes are required

BUILD A REQUIREMENT TRACKER — ONE ROW PER RULE

Requirement	Guide says	Reality	Action
PO number (BEG)	Mandatory	Mandatory	Build and test first
Allowance (SAC)	Conditional	When a discount applies	Map the rule, not just the field
Cancel-by date (DTM)	Optional	Rejected without it	Treat as mandatory

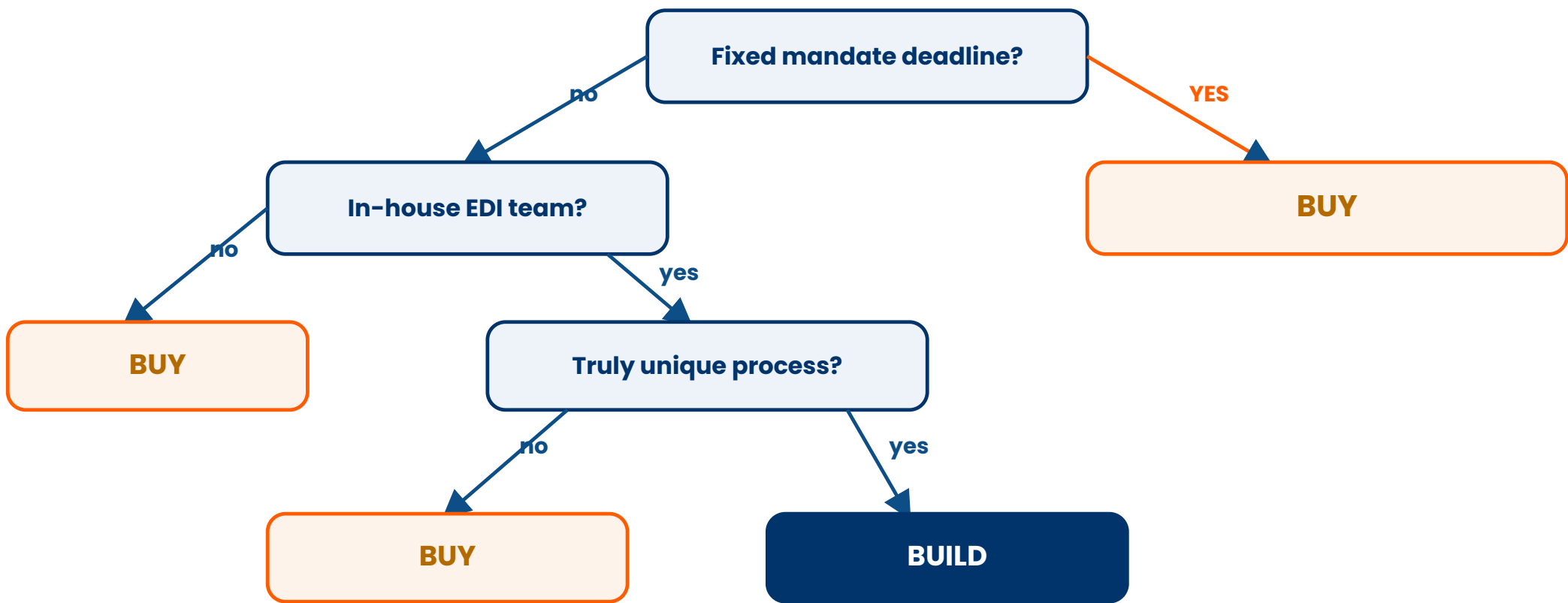
The third row is the dangerous one: “optional” in the guide, enforced by the validator. A tracker is how you catch it in week two instead of week eighteen.

PART TWO · CHOOSING YOUR PATH

Build vs. Buy

With no existing EDI estate, this decision is genuinely open — and it is where a deadline should weigh heavily. Building gives you total control and fits genuinely unusual processes; it also makes you permanently responsible for security, compliance updates, infrastructure and the specialists who understand it all. Buying trades some flexibility for speed and a vendor who keeps the platform current, patched and compliant on your behalf. For most first-time implementers facing a fixed compliance date, the honest answer is buy.

FIGURE 3 · A GREENFIELD DECISION PATH



On a fixed deadline, build only survives when you have both an experienced in-house EDI team and a genuinely unique process.

The hidden cost of build

Total cost is not the first release — it is infrastructure, testing, standards upkeep and salaries to maintain it forever. If a key developer leaves, the knowledge often leaves too.

The greenfield reality

A poor build discovered late cannot be unwound before the compliance date. Buying is the lower-risk path to a certified go-live when the clock is fixed.

WHAT EACH SIDE ACTUALLY COMMITS YOU TO

	Build	Buy
Speed	Slow — you write and test everything	Fast — pre-built partner content
Cost shape	Large up-front + salaries forever	Predictable subscription
Who patches it	You — security, standards, versions	The vendor
Key-	High — knowledge walks out the door	Low — support is contracted

PART TWO · CHOOSING YOUR PATH

Platform Selection: Sterling, Boomi, or Cleo

As a greenfield buyer you have one advantage the migration crowd lacks: no existing estate to carry across. That changes the criteria — you are choosing for where you are going, not what you already run. Three platforms dominate the shortlist, and they fit very different organisations. Let size and trading-partner complexity drive the choice, not brand reputation or a feature checklist; a platform chosen for the wrong reasons costs more to unwind than it would have cost to pick correctly the first time.

A VENDOR-NEUTRAL VIEW

IBM Sterling

BEST FIT

Large enterprises, high volume

STRENGTH

Deepest standards support; the biggest EDI talent pool

WATCH OUT

Higher cost, longer timeline; plan for version end-of-life

Boomi

BEST FIT

Broad integration needs

STRENGTH

Cloud-native; EDI plus APIs on one platform

WATCH OUT

Scrutinise depth of retail partner content

Cleo

BEST FIT

Mid-market, EDI-focused

STRENGTH

Approachable onboarding; shorter implementation

WATCH OUT

Narrower than a full iPaaS if you need more later

HOW TO SHORTLIST

- Match to your **size and partner count**, not headlines
- Confirm depth of **retail-specific** partner content
- Compare realistic **implementation timelines**
- Weigh total cost, not just licence price

QUESTIONS TO ASK EACH VENDOR

- How long to certify with our specific retailer?
- Which of our transaction sets are pre-built?
- What does support cost and cover after go-live?
- Can we see references at our size and complexity?

PART TWO · CHOOSING YOUR PATH

Standards: ANSI X12 vs. EDIFACT

You do not really choose a standard — your trading partner does. For a North American retail mandate the answer is almost always ANSI X12; EDIFACT is the global counterpart, dominant in Europe and Asia. The two are cousins, not twins: they carry the same ideas in different syntax, and a map written for one cannot serve the other. Knowing which you are on — and resisting the urge to “support both just in case” — keeps the build honest and the timeline realistic.

TWO STANDARDS, DIFFERENT WORLDS

	ANSI X12	EDIFACT
Origin	North America, 1979	United Nations, 1986
Where used	US / Canada retail, healthcare, logistics	Europe, Asia, international trade
Document names	Numeric — 850, 856, 810	Words — ORDERS, DESADV, INVOIC
Envelopes	ISA / GS	UNA / UNB
Separators	* element ~ segment	+ : '

US retail mandate?



Then it is X12. Build X12, and add EDIFACT only if a European partner genuinely requires it later.

One map per syntax



A single map cannot serve both. Each standard needs its own map set and its own maintenance.

WHAT AN X12 ENVELOPE LOOKS LIKE ON THE WIRE

```
ISA*00*          *00*          *ZZ*SUPPLIER      *ZZ*RETAILER      *260115*0830*U*00401~
interchange
GS*PO*SUPPLIER*RETAILER*20260115*0830*1*X*004010~  group
ST*850*0001~    the 850 begins
  BEG*00*SA*4500012345**20260115~
  SE*4*0001~    GE*1*1~    IEA*1*000000001~    close each envelope
```

Every document you send is wrapped like this. EDIFACT carries the same idea with UNB/UNH and different separators — which is why one map cannot serve both.

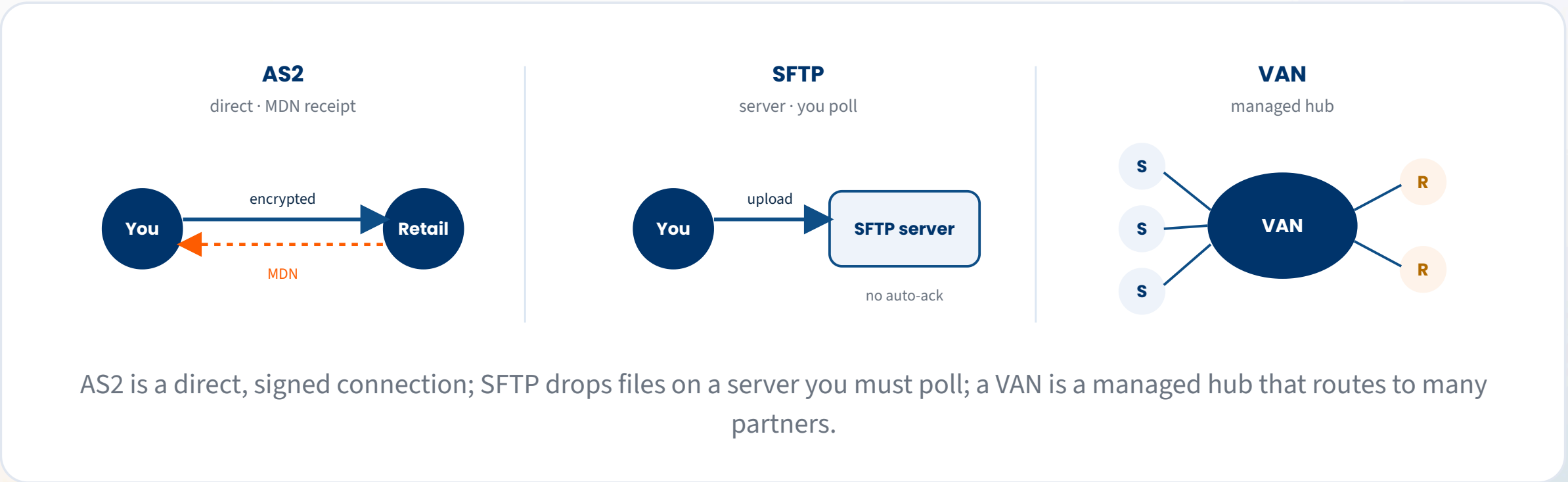
The trap. Teams that claim “EDIFACT support” while building only for X12 accumulate maps that **fail quietly** the day a European partner updates their guide — so support what you actually use.

PART TWO · CHOOSING YOUR PATH

Protocols: AS2 vs. SFTP vs. VAN

The protocol is how the documents physically move. The retailer usually dictates it — large retailers frequently mandate AS2 — but understanding all three tells you what you are signing up to operate after go-live, and where the day-two failure modes hide. They differ most in one thing that matters at 2 a.m.: whether you get proof of delivery.

FIGURE 4 · HOW EACH PROTOCOL CONNECTS YOU TO A PARTNER



THE PRACTICAL TRADE-OFFS

	AS2	SFTP	VAN
Delivery proof	Yes — MDN receipt	None built in	Yes — provider reports
Setup	High — certificates	Low to moderate	Low — provider runs it
Cost	Low after setup	Low	Subscription / per-transaction
Best when	Retailer mandates it; high volume	Few partners; simple needs	Large, varied partner network

The AS2 gotcha

Certificates expire. An expired or mismatched certificate stalls transmission entirely — put renewal on a calendar before it puts you on a chargeback report.

The SFTP gotcha

No automatic acknowledgment. If polling or monitoring lapses, a failed exchange goes unnoticed until a partner asks where their document is.

PART THREE · BUILDING IT

The Checkpoint Model

The reason greenfield EDI projects slip is almost never the mapping. It is that a team runs several threads in parallel, discovers late that an early assumption was wrong, and unwinds weeks of work. The checkpoint model prevents that: the build is a pipeline of gates, and nothing downstream starts until the gate before it has genuinely passed. A gate is binary — “mostly working” is not passed — and that discipline is what keeps a six-month plan from becoming a nine-month one.

FIGURE 5 · THE BUILD AS A GATED PIPELINE



Why gates, not a Gantt chart

A timeline tells you when work *should* finish; a gate tells you whether it actually did. On a fixed deadline, only the second protects you — a slipped gate is visible immediately, not at go-live.

The anti-pattern to avoid

Running mapping, integration and testing at once feels faster. It is not: one wrong assumption in requirements silently invalidates all three, and the rework erases the time you thought you saved.

The gate you cannot rush

Certification (Gate 6) belongs to the retailer, not you. Never schedule cutover before it — and leave room for at least one re-test cycle.

WHAT OPENS EACH GATE

- **1 Requirements** — guide read, every rule classified
- **2 Connectivity** — a test message sends and returns
- **3 Maps** — each set produces spec-valid output
- **4 ERP** — data flows both ways, cleanly
- **5 Partner test** — the validator accepts your documents
- **6 Certification** — the retailer clears you for production
- **7 Parallel run** — live works with a fallback in place

PART THREE · BUILDING IT

What Each Gate Validates

A gate is only useful if its exit criteria are explicit; vague gates get waved through. The table below turns each checkpoint into a concrete question with a yes-or-no answer — and names what must not start until the answer is yes. Print it, assign an owner to every row, and refuse to move on until the owner can say “yes” without a caveat.

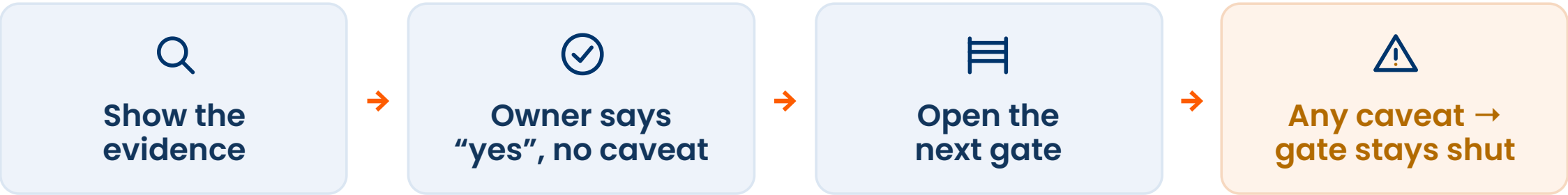
EXIT CRITERIA, GATE BY GATE

Gate	Validates that...	Blocks until passed
1 • Requirements	Every required field and label rule is understood	Platform selection
2 • Connectivity	You can send and receive a test message at all	Mapping
3 • Maps	Each set produces spec-valid output	ERP integration
4 • ERP	Orders, ship data and invoices flow cleanly both ways	Partner testing
5 • Partner test	The retailer’s validator accepts your documents	Certification
6 • Certification	You are formally cleared for production	Cutover
7 • Parallel run	Live transactions succeed with a safety net	Manual fallback removal

Gate 4 is where schedules are won or lost. The EDI itself may be perfect, but if the ERP cannot accept an order or emit a clean invoice, nothing downstream can proceed.

Gate 5 is not yours to grade. Only the retailer’s validator can pass it. Build in time for a re-test cycle — almost no one certifies first time.

HOW TO RUN A GATE REVIEW



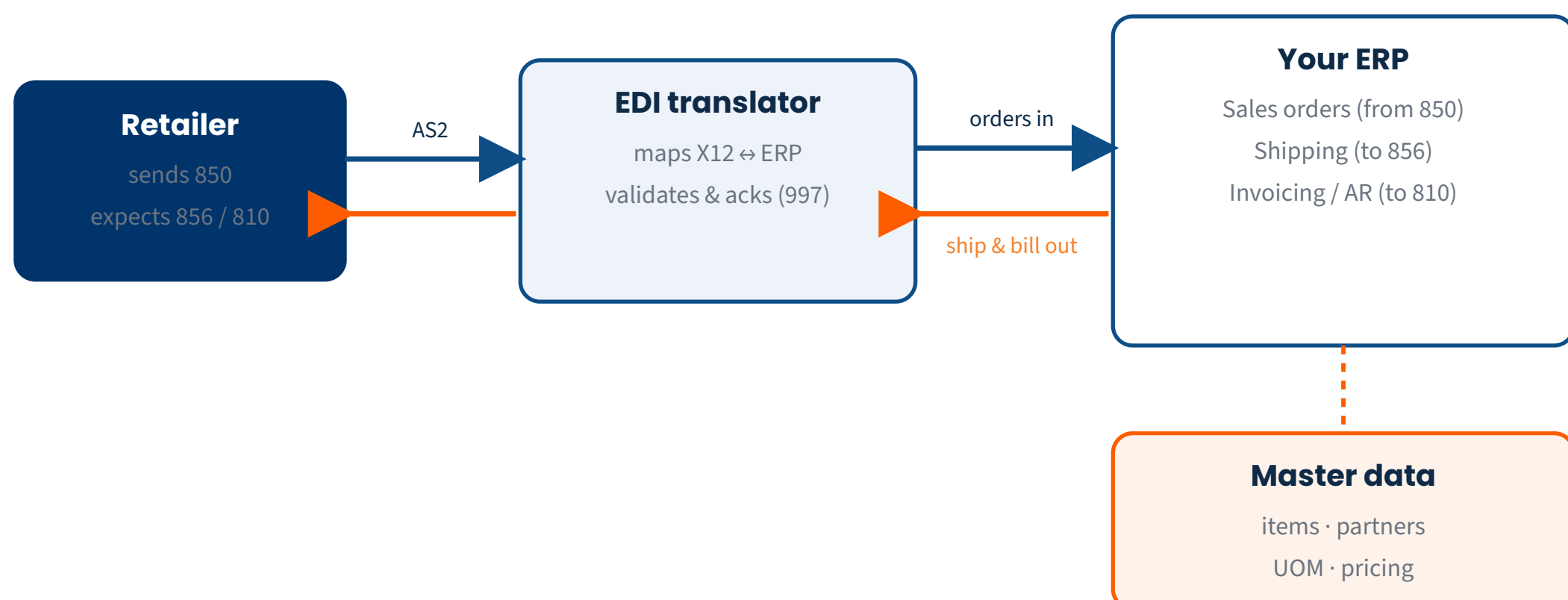
A gate review is a five-minute conversation with proof, not a status colour on a slide. If the owner needs to explain a workaround, the gate has not passed.

PART THREE • BUILDING IT

ERP Integration From Zero

Here is the part no blog warns you about loudly enough: the integration between EDI and your ERP is usually a bigger job than the EDI itself. Translating an 850 into valid X12 is well-trodden. Making that order appear correctly as a sales order in *your* ERP — with the right item, price, unit of measure and partner — is where greenfield projects actually spend their time. Each core document is a two-way translation, not a file drop: the 850 becomes a sales order, the shipment becomes an 856, the AR invoice becomes an 810.

FIGURE 6 • WHERE THE DATA HAS TO LAND



Blue is inbound (the 850 becoming a sales order); orange is outbound (the 856 and 810). Master data feeds every translation.

MASTER DATA THAT MUST BE CLEAN FIRST

- **Item / SKU cross-reference** — their number to yours
- **Partner identifiers** — GLN, DUNS, ship-to codes
- **Units of measure** — eaches, cases, pallets
- **Price lists & terms** — matched to the PO

WHERE IT COMMONLY BREAKS

- Their SKU has no match in your item master
- UOM mismatch turns 1 case into 12 eaches
- Ship-to code doesn't map to a real location
- Price on the 850 disagrees with your price list

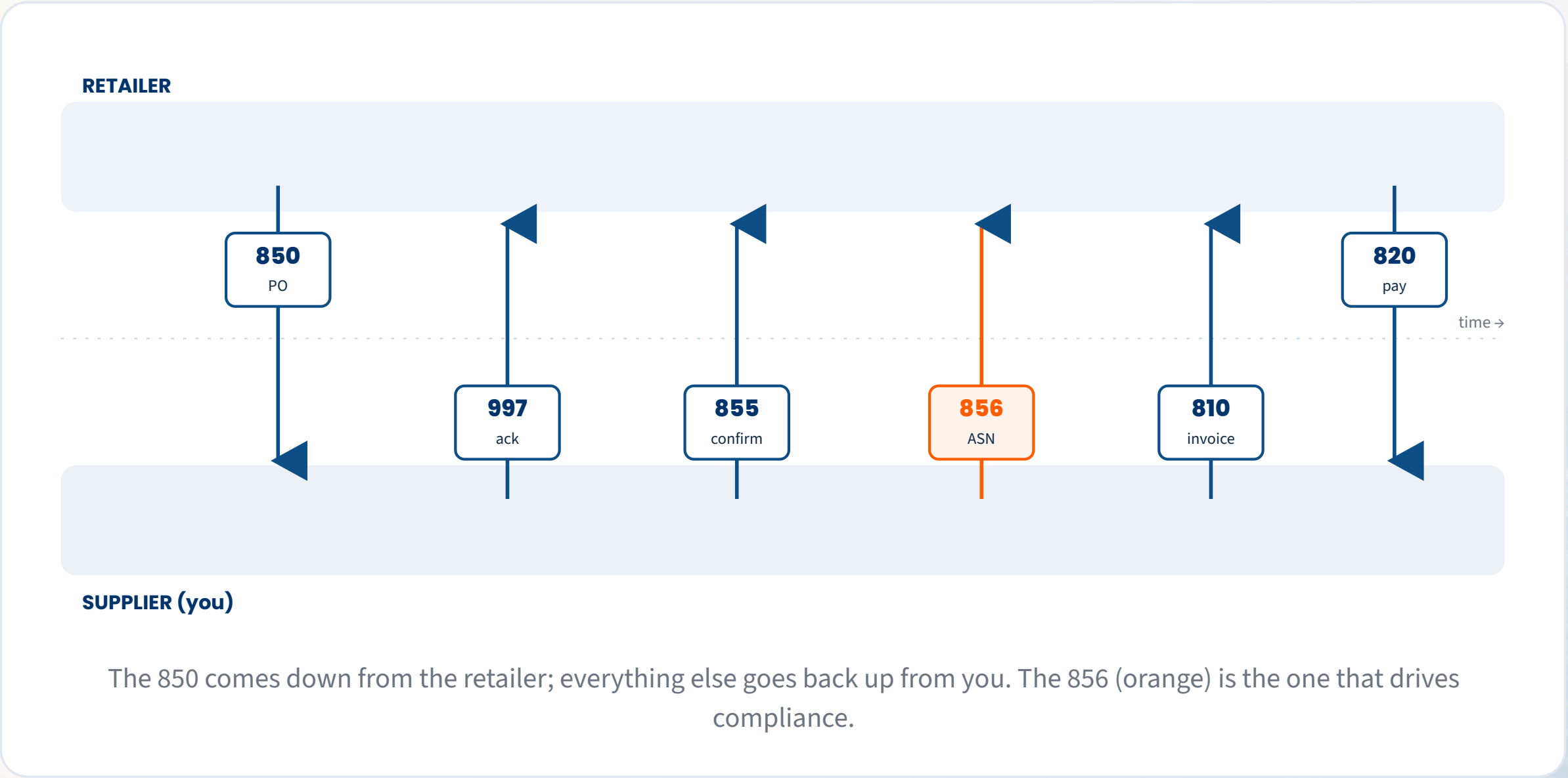
Dirty master data is the most common reason a technically-correct 850 still fails to become a usable order. Start the cleanup in week one — it is slow, cross-functional work that cannot be compressed at the end, and rarely the EDI team's to fix alone.

PART THREE • BUILDING IT

Your First Transaction Sets: 850, 856, 810

Almost every retail mandate is built on the same core chain. Implement it in the order the business runs — the order you receive, the shipment you announce, the invoice you send — and add the acknowledgments that keep it honest. The diagram makes the direction explicit: some documents come to you, most go back, and each one has a moment it is due.

FIGURE 7 • THE ORDER-TO-CASH EXCHANGE



WHAT TO IMPLEMENT, AND WHEN

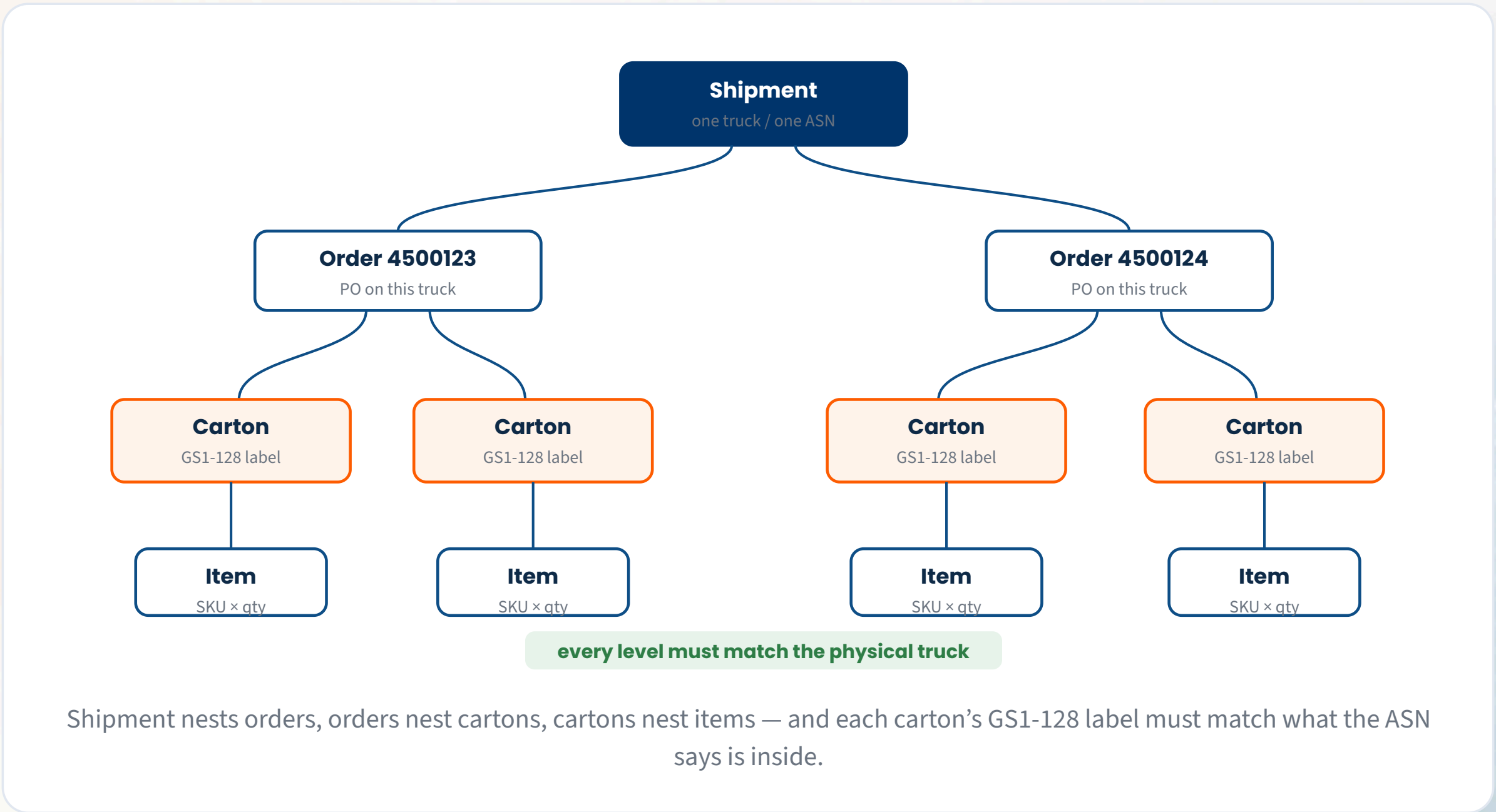
Set	What it is	Direction	Priority
850	Purchase order	Inbound	First — nothing flows without it
997	Functional acknowledgment	Both	First — usually mandatory
856	Advance ship notice	Outbound	Hardest — test disproportionately
810	Invoice	Outbound	Core — ties to the 850 and 856
855 / 820	PO ack / remittance	Both	Add in phase two if required

PART THREE • BUILDING IT

The 856 Deserves Disproportionate Testing

If one document will generate your chargebacks, it is the 856. The advance ship notice is uniquely demanding: it is hierarchical, it must exactly mirror what is physically on the truck, it is tied to the barcode labels on your cartons, and it is timing-sensitive — it has to arrive before the shipment, not with it. Because the retailer’s on-time-and-complete tracking reads the 856, a wrong ASN can register as an OTIF failure even when delivery was perfect. A flawless 850 and 810 will not save you.

FIGURE 8 • THE ASN HIERARCHY — AND WHY IT’S HARD



WHY IT’S THE HARD ONE

- **Physical accuracy** — data must match the pallet, carton by carton
- **Label linkage** — every GS1-128 barcode ties to the hierarchy
- **Timing** — it must transmit ahead of the truck

856 TEST CHECKLIST

- Hierarchy nests correctly for multi-order shipments
- Carton labels scan and match the ASN contents
- Quantities reconcile to the physical pick
- The ASN transmits ahead of the truck

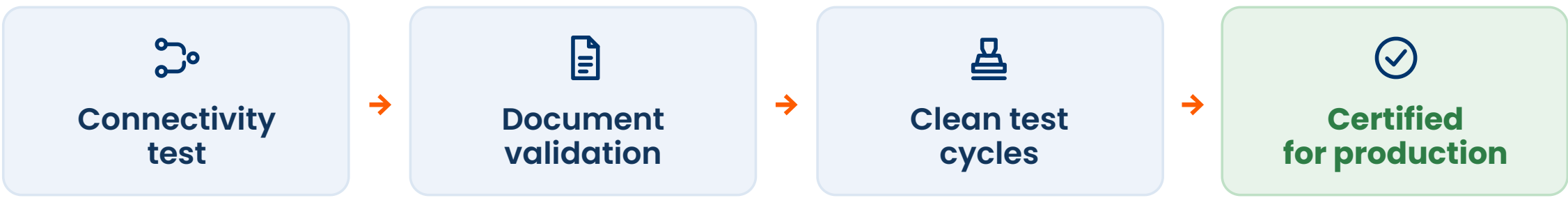
PART FOUR · GOING LIVE

Partner Certification and Parallel Run

Certification is the retailer testing you until they trust your transactions in production. Expect a sequence of submissions, rejections and re-tests — almost no one passes on the first try, and the guide usually specifies how many clean cycles are required before you are cleared.

In a greenfield build, the parallel run that follows means something specific — and different from a migration. You are not running an old EDI system beside a new one. You are running EDI beside your **manual or portal** process, keeping the human fallback until each partner has certified you. Make that distinction explicit, so the two kinds of parallel run are never confused on a status call.

THE CERTIFICATION SEQUENCE



TWO KINDS OF PARALLEL RUN — DON'T CONFUSE THEM

	Greenfield (this guide)	Migration
Runs beside	Manual / portal process	The existing EDI system
Fallback if it fails	Keep keying orders by hand	Revert to the old EDI
Ends when	Each partner certifies you	New system proven stable

WHAT THE RETAILER ACTUALLY CHECKS

- **Connectivity** — you can send and receive
- **Structure** — envelopes and segments are valid
- **Content** — required fields, qualifiers, codes
- **Labels** — GS1-128 scans and matches the ASN
- **Timing** — the 856 arrives ahead of the truck

PLAN FOR THE RE-TEST

Assume your first submission is rejected on something small — a date format, a missing qualifier, a label placement. Schedule the fix-and-resubmit loop **into** the timeline; the retailer's queue, not your speed, sets how fast it turns around.

Keep a log of every rejection reason — it becomes your onboarding checklist for the next partner.

PART FOUR · GOING LIVE

Who Runs This on Monday?

Go-live is not the finish line; it is the start of an operational commitment most first-time implementers have not planned for. EDI needs someone watching acknowledgments, renewing certificates, onboarding the next partner and fixing the map when a retailer changes their guide. Deciding who — before go-live, not after — is part of the project, not an afterthought.

THREE WAYS TO STAFF IT

Model	What you get	The catch	Best fit
In-house	Full control, deep partner knowledge	Hard to hire; one departure is a gap	High volume, complex
Outsourced	Predictable cost, no hiring problem	You share the team — check the SLA	Limited internal scale
Fractional	Small internal presence + outside depth	Needs a capable internal owner	Moderate, stable volume

QUESTIONS FOR A PROVIDER

- How many clients share our support team?
- Your real average response time when busy?
- Who owns partner onboarding — you or us?

SIGNS YOU’VE UNDER-RESOURCED

- One person “knows EDI” and no one else does
- Certificate renewals are remembered, not scheduled
- No plan for the next partner in the queue

The most common go-live mistake is a single person who “knows EDI.” When they take leave, so does your compliance. Build at least a second set of hands into the plan from day one.

APPENDIX

Mandate Response Checklist: Week 1 to Go-Live

Kept deliberately phase-based, not day-by-day — so it holds whether your deadline is five months out or seven. Work each phase to its gate before opening the next; the gate, not the calendar, decides when you move on. Phases 1 and 2 are entirely within your control, which is exactly why slippage here is unforgivable later.

Phase 1 • Respond & Decide

- Acknowledge the mandate; confirm the compliance date
- Obtain and read the implementation guide
- Classify requirements: mandatory / conditional / enforced
- Estimate chargeback exposure if the date is missed
- Decide build vs buy; shortlist platforms
- Confirm the standard (X12) and protocol (AS2)
- Name an internal owner; lock scope and budget
- Plan backward from the certification date

Phase 2 • Build & Integrate

- Stand up the platform and connectivity
- Exchange a first test message end to end
- Build maps for 850, 997, 856, 810
- Clean master data: items, partners, UOM, pricing
- Integrate EDI with the ERP, both directions
- Prove an internal order-to-cash loop
- Confirm GS1-128 label output is correct
- Pass Gate 4 before requesting partner testing

THE GATE-4 HANDOFF — PROVE ALL OF THIS BEFORE PARTNER TESTING

- | | |
|--|--|
| <ul style="list-style-type: none"> • A retailer 850 posts as a clean sales order • Your pick produces a valid, nesting 856 | <ul style="list-style-type: none"> • Your AR invoice produces a reconciling 810 • 997s return for every document exchanged |
|--|--|

If any one of these needs a manual workaround, you are not through Gate 4 — and partner testing will only surface the same gap more expensively.

Phases 3 and 4 continue overleaf →

APPENDIX

Checklist: Test, Certify, and Go Live

The second half of the project shifts control to the retailer. Your job is to arrive clean, respond fast to rejections, and cut over one partner at a time — keeping the manual fallback warm until every partner is certified and stable. The two phases below are shorter on tasks and longer on patience: most of the calendar here is spent waiting on the retailer’s test queue, so the discipline that matters is fixing each rejection completely rather than resubmitting a near-miss.

Phase 3 • Test & Certify

- Run partner connectivity and document validation
- Test the 856 disproportionately — hierarchy, labels, timing
- Complete the required number of clean test cycles
- Fix every rejection; re-test until the validator accepts
- Confirm GS1-128 labels scan on real cartons
- Obtain formal certification for each transaction set

Phase 4 • Go Live & Operate

- Begin parallel run beside the manual / portal process
- Monitor 997s and MDNs for every exchange
- Remove manual fallback only after certification holds
- Assign ongoing ownership: in-house, outsourced or fractional
- Put certificate renewals on a calendar
- Plan phase two: additional sets and the next partner

One rule for the whole checklist. A phase is complete when its gate passes — not when its tasks are ticked.

Keep the fallback warm. Do not decommission the manual process until every partner is certified and stable.

GO-LIVE DAY: THE FIRST 48 HOURS

- | | | |
|---|---|---|
| • Watch the first live 850 land as an order | • Check every 997 / MDN returns | • Have the vendor on call for the first cycle |
| • Confirm your first 856 and 810 are accepted | • Keep operations ready to key manually | • Log anything odd — do not “wait and see” |

REFERENCE

EDI Glossary

The vocabulary a first-time implementer meets in the first month — enough to read a mandate and a guide without stopping to look things up.

EDI

Electronic Data Interchange — computer-to-computer exchange of standard business documents.

Trading partner

A retailer or supplier you exchange EDI documents with.

ANSI X12

The North American EDI standard; numeric transaction sets.

EDIFACT

The international EDI standard, common in Europe and Asia.

Implementation guide

A partner's spec for exactly how to format and send each document.

Transaction set

A single standardised EDI document, identified by number.

850

Purchase order — the retailer's order to you.

855

Purchase order acknowledgment.

856 / ASN

Advance ship notice — what is shipping, in what cartons, when.

810

Invoice — your request for payment.

820

Payment / remittance advice.

997 / 999

Functional acknowledgment — confirms a document arrived and parsed.

Segment

One line of an EDI document (e.g. PO1, N1), built from elements.

Mapping

Linking EDI fields to your ERP's data fields.

Translation

Converting between EDI format and your internal format.

AS2

A secure, direct internet protocol with signed delivery receipts (MDN).

SFTP

Secure file transfer over SSH; no built-in acknowledgment.

VAN

Value-Added Network — a managed intermediary that routes EDI.

MDN

Message Disposition Notification — AS2's proof of delivery.

GS1-128 / UCC-128

The barcode label standard for cartons and pallets.

GLN / DUNS

Standard identifiers for locations and businesses.

ISA / GS

X12 interchange and functional-group envelopes.

Certification

The retailer's process of approving you for live EDI.

Parallel run

Running EDI beside your fallback process until certified.

Chargeback

A deduction taken from your remittance for non-compliance.

OTIF

On Time In Full — a delivery-performance metric with penalties.

REFERENCE

About DivIHN

DivIHN helps suppliers meet retailer EDI mandates without the scramble — and keeps them compliant long after go-live. Our EDI practice combines platform expertise, trading-partner knowledge and ERP integration, so a first-time implementation lands on time and stays that way.

HOW WE HELP SUPPLIERS



Mandate response & scoping

Reading the guide and building the checkpoint plan.



Implementation & integration

Platform, maps and ERP integration, end to end.



Managed EDI operations

In-house, outsourced or fractional support after go-live.

SOURCES & FURTHER READING

- DivIHN — *What Is EDI? A Simplified Guide*
- DivIHN — *EDI vs. API vs. JSON*
- DivIHN — *Build vs. Buy an EDI Platform*
- DivIHN — *Sterling, Boomi, or Cleo (2026)*
- DivIHN — *ANSI X12 vs. EDIFACT · AS2 vs. SFTP vs. VAN*
- DivIHN — *850, 856 & 810 Explained*
- DivIHN — *The Hidden Cost of EDI Chargebacks*
- DivIHN — *Walmart's OTIF Penalty · EDI Staffing Models*

Full articles: divihn.com/edi/insights

Facing an EDI mandate with a deadline?

Talk to DivIHN about a checkpoint-driven path from mandate letter to first certified transaction.

- divihn.com/edi
- [EDI Practice](#)

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IN SERVICE, WITH
EXCELLENCE AND GRACE

EDI Implementation Plan

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