TRADING PARTNER ONBOARDING & MAPPING ESSENTIALS CHECKLIST

Gather Partner Requirements

- Confirm the EDI standard and specific transaction sets required (e.g., ANSI X12, EDIFACT).
- Document unique data needs, such as specific product codes, custom fields, or required delivery terms.

Managing varied data needs for each partner may require specialized resources and tools to prevent delays.

Set Up and Customized Data Mapping

- Map essential data fields, including ID numbers, addresses, and pricing, etc.
- Adjust any data format differences (like units of measure or date formats) to ensure consistency.

When multiple systems or partners are involved, customized mapping can quickly become a time-intensive task to maintain accuracy.

Schedule Testing and Validation

- Conduct thorough testing for each mapping to identify and resolve potential issues before going live.
- Validate document types like POs, invoices, and ASNs to ensure smooth flow between systems.

The more partners you have, the more testing time may be required to achieve compliance and avoid errors.

Establish Regular Communication with Partners

- Confirm that all requirements are met with each partner, and schedule follow-up testing as needed.
- Arrange regular check-ins to keep up with evolving requirements and minimize downtime.

Coordinating these communications across partners can become demanding, especially if updates are frequent.

Prepare for Ongoing Maintenance

- Regularly review mappings to accommodate partner updates, regulatory changes, or internal system upgrades.
- Schedule periodic mapping audits to ensure everything runs smoothly without disruption.

Staying on top of mapping updates requires careful attention, as missed updates can lead to costly delays or errors.

With this checklist, you'll be well-equipped for a smooth trading partner onboarding—and we're here to support you any way we can.

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