

ONBOARDING CHECKLIST

- ✓ Provide VPN and/or RDP access and credentials to your EDI provider
- ✓ Compile IPs for whitelisting
- ✓ Grant ERP access and any documentation if applicable
- ✓ Assemble client contacts + roles/responsibilities (business, technical, primary contact, etc.)
- ✓ Gather trading partner contact information
- ✓ Collect trading partner EDI specs (IDs, map specs, samples, communication info, testing requirements, mandatory vs. optional)
- ✓ Provide internal file layouts, inbound and outbound documents
- ✓ Solidify business expectations with trading partners (SKUs, vendor numbers, pack sizes, fulfillment SLAs, etc.)
- ✓ Finalize project scope, plan and timeline
- ✓ Determine labeling requirements (i.e. required data) or branded documents (i.e. BOL, packing list, etc.) if applicable
- ✓ Communicate any ship-to or Item cross reference setup needed

QUESTIONS

- ✓ Are these new partnerships, existing partnerships or a mixture of both?
- ✓ How do you do business with each partner? (warehouse, direct to store, drop ship, etc)
- ✓ Do you expect any seasonality with any of these partners?
- ✓ Can your ERP return all needed data for outbound documents?

