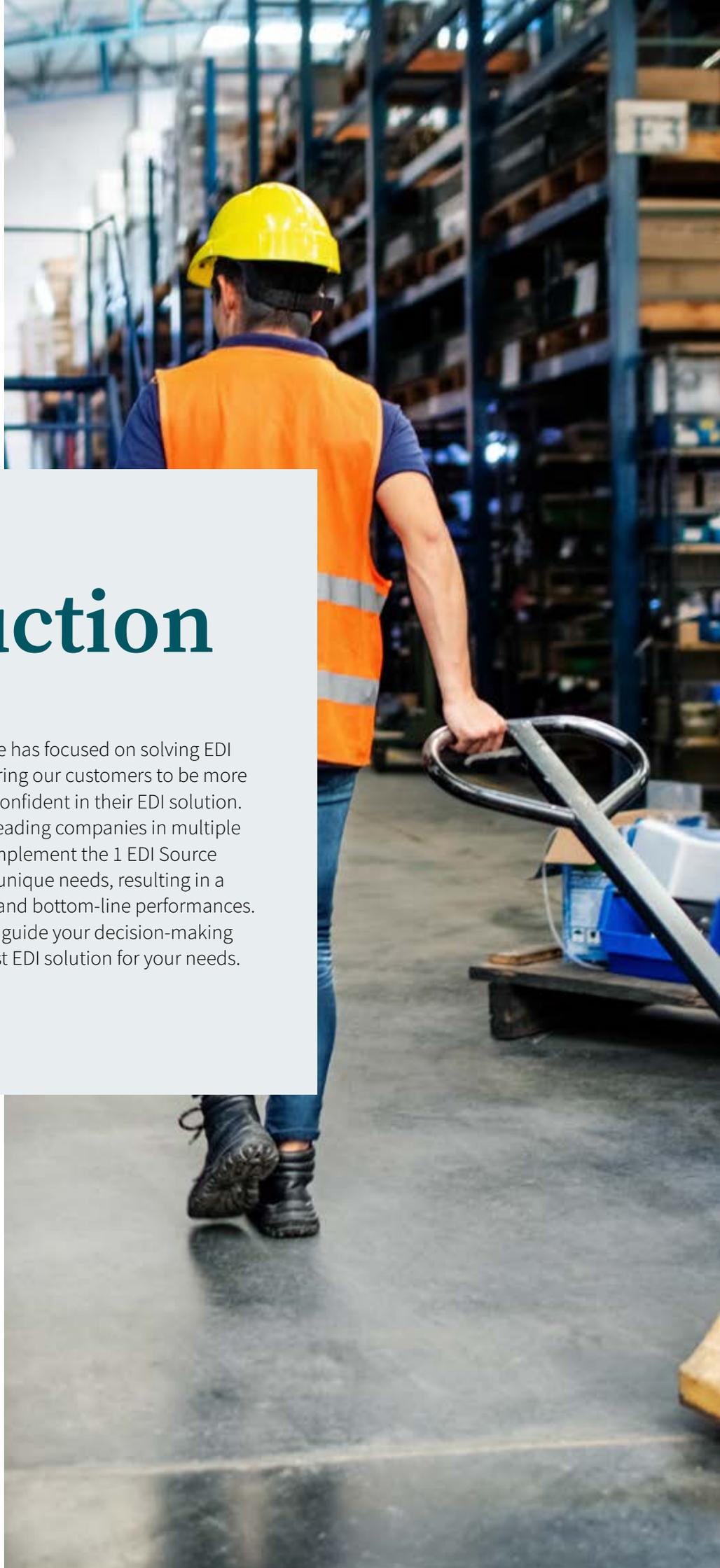


EDI Buyer's Guide

Finding the Best Total Solution
for Your Business

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Introduction

For more than 30 years, 1 EDI Source has focused on solving EDI business challenges while empowering our customers to be more productive, efficient, accurate and confident in their EDI solution. Over the years we have supported leading companies in multiple industries to identify, analyze and implement the 1 EDI Source solution best tailored to meet their unique needs, resulting in a significant impact on service levels and bottom-line performances. This experience positions us well to guide your decision-making process and ensure you find the best EDI solution for your needs.



New to EDI or Transferring Systems?

There are a handful of reasons that you might be looking for a new solution. Are you struggling with compliance on your current system? Are you currently using manual or automated systems that are not productive or efficient? Are you new to EDI? Do you have a customer that requires it? Finding the right EDI partner can solve all of these challenges. If you aren't familiar with what an EDI system can do, below are the critical benefits for investing in a state-of-the-art EDI solution.

Error Reduction

Integrating your EDI transactions with your back office systems eliminates manual data entry and reduces errors related to these manual processes.

Manage by Exception

Choosing a system that “manages by exception” allows it to essentially run itself, reaching out to you via alerts only when necessary.

Faster Onboarding

A rapid do it yourself onboarding system for new trading partners facilitates growth and adaptability. This is critical to quickly realizing new revenue generating opportunities.

Move off Vendor Portals

Some of your larger customers may require new vendors without EDI to process transactions using arduous methods and multiple online portals. By having your own solution, it will eliminate these extra steps and improve efficiency.

One System of Record

An enhanced leading edge EDI solution will replace outdated systems providing you the transparency needed to directly access the actual data exchanged with your most important business partners.

A Happy Accounting Team

Your accounting department will often be the first to realize the measurable benefits from the proper EDI system. This can include more timely customer payments, reduced pricing mismatches and fewer compliance deductions, fines and chargebacks.

Optimize Allocation of Resources

A reduction in manual data entry allows your team to focus on higher value activities while decreasing the chance of human error.

Improve Customer Relationships

Removing outdated systems and/or manual processes can positively impact customer satisfaction and loyalty, consequently improving your potential for growth.

How Does EDI Work?

An EDI solution, just like any other business system, must handle a variety of tasks reliably and cohesively. The end result should be automated and integrated B2B transactions. The following are important functional requirements to consider when choosing an EDI solution.

Communication

Communication is the cornerstone of EDI. Your solution must be able to communicate automatically using the approved method your trading partners require. These communication methods may include the exchange of files by secure FTP or AS2 communication protocols or leveraging a Value Added Network (VAN). Setting up the communication requirements for your EDI solution should be included as part of your overall package.

Translation

Another key functionality of your EDI solution is the ability to ensure received documents are valid and acceptable based on common industry approved EDI standards, as well as provide timely and accurate Functional Acknowledgments (FAs) that act as a digital receipt for the transaction. The quality of the translator varies from one solution to another and not all are created equal. It is important to evaluate the degree to which the translator is automated to provide standards validation and FA reconciliation to ensure that all documents, sent and received, are accurate and correct.

Data Management

Implementing your EDI solution is only the beginning, then you must manage your EDI operation and ensure that data is being exchanged with your trading partners consistently. To position you for success, choose an EDI system that has a full suite of built in alerts and an easy-to-use dashboard that shows all of your information in one place. This will allow users to manage by exception and enable organizations to realize the full operational value of EDI.

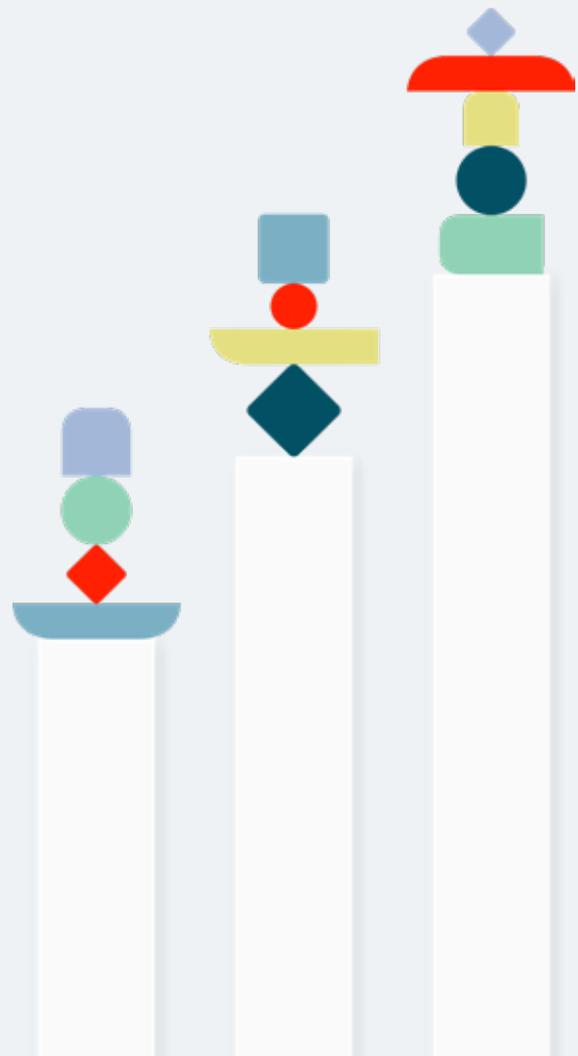
Integration

Do you have other back office systems that your EDI solution needs to communicate with? Integration can bridge the gap between disparate systems allowing smoother business processes and operational efficiencies. Many commercial or custom Enterprise Resource Planning Systems (ERPs), Warehouse

Management Systems (WMSs), and Transportation Management Systems (TMSs) do not natively accept EDI formatted transactions. Therefore, if you have these integration needs, you will need an EDI partner that can integrate these systems on your behalf.

Mapping

Possibly the most important aspect of an EDI solution is how it allows you to map EDI data into a format that your back office system can accept. While the process of mapping is universal, it is often tailored to each individual business since each company uses its backoffice systems differently and requires the data to be mapped differently. Mapping may be part of the EDI solution or offered as a service from the provider. The most common data formats supported by a top tier mapping solution allow you to map your data to flatfiles, XML, Comma Separated Values (CSV) files and directly map your data to database tables via OpenDatabase Connectivity (ODBC). If you choose to map your EDI data internally, be sure that your provider can offer you the training necessary to fully leverage your EDI solution's mapping capability.



Understanding Your EDI Needs

Choosing the right EDI solution is imperative; it can be the difference between smooth operations and efficiency, or a very frustrating experience. It is important to take the following into consideration when finding the best EDI solution for you.

The first step in choosing the right solution is to understand your needs. The following questions will help you begin that process:

1. How many trading partners do you have?
2. What kind of growth do you project, and how many trading partners do you plan to have over the next 5 to 10 years?
3. Do you have integration requirements that require you to push data into and pull data from an ERP or other back office system?
4. Are you looking for a solution that you or your team can manage, or would you prefer that the EDI provider manage it for you?
5. Are you currently struggling with chargebacks, fines, deductions or other compliance issues? Do you need a solution where you can build in custom business rules and alerts to ensure the data you are exchanging is accurate, timely and correct?
6. Do the EDI solutions you are reviewing allow you to search and find data easily?
7. Do you have special requirements with any of your trading partners that requires specific logic within your EDI data maps, such as translating customer item numbers with internal item numbers or pricing validation?
8. Would you prefer an on-premise software program providing you 100 percent control over your operations, or a cloud-based solution in which your infrastructure needs are handled by the provider?



Solution Types

To help narrow the list of potential providers, you should determine what type of solution would be best for you.

On-Premise/Cloud Software Solutions

For those companies that want to maintain full control over their EDI operations, software solutions are typically the best option. Regardless of document volumes, the number of trading partners or integration requirements, if you want to ensure that you are fully in the driver's seat to set up and run your EDI operation, there is no alternative to a software solution. A critical feature that you should evaluate is the ability to perform the EDI data mapping and integration. Some solutions provide an on-premise function but maintain all EDI data mapping in the cloud, falling short of enabling self-sufficiency. Software solutions should also allow you to deploy on-premise in your data center or provide the solution hosted in the cloud.

Managed EDI Solutions

If you expect higher document volumes (more than 200/month) and have a back-office system that can be integrated, but lack the resources or desire to manage your own EDI operation, a managed solution would be the best fit. Managed EDI solutions essentially outsource this highly-technical function and serve as an extension of your business to manage the onboarding, data mapping and ongoing monitoring and management of your EDI operations. These solutions are a great fit for companies that make the choice not to invest in EDI initially, but you'll want to ensure that the provider you choose has the option to bring EDI back in-house to manage in the future, if so desired.

Web-Based EDI Solutions

If you are new to EDI or expect to exchange a limited number of documents (less than 200/month) with just a few trading partners (less than five), then a web-based solution is a good one. Web-based solutions may be implemented without integration with your back-office systems and present EDI from your trading partners as easy to read web pages. This allows you to "turn around" these documents using web forms so that you can respond to your trading partners via EDI through a simple web browser.

While there are a number of details involved in finding the right EDI partner, these questions will enable you to be more knowledgeable about your needs going into the process. The goal when looking for an EDI solution is to find a partner that will not only meet your needs in the short-term, but also provide you the flexibility you need to ensure that it can support you over the long term. The right EDI solution should be considered an investment in your business to facilitate the exchange of business documents with your most important customers and suppliers for many years. Once you have chosen the right partner and the system is integrated into your operational workflow, all of the work will have been well worth the time and investment.



Choosing an EDI Provider

Experience

While EDI has been enabling business communications for decades, it is a discipline that requires extensive experience to be done well. Between the different EDI standards, versions and specific trading partner implementation requirements, the processes and requirements to successfully implement and operate a B2B exchange using EDI are unique to each business and often highly complex. Most companies that utilize EDI only have one or two people who understand the EDI language and can effectively manage the EDI life cycle. When looking for an EDI partner, it is important to find one who has been in business for many years. It is imperative that they understand EDI fully and can tailor it to fit your unique business needs.

Stability

You want an EDI partner that you can work with for the long-term. Implementing a new EDI system is a significant investment in time and money, so it is important to choose the right one to prevent outgrowing your current solution in just a few short years. Examine the company's history, client base and future plans. Ask for references to ensure their clients are happy. It is important to ensure that the company is continuing to invest in its most important asset, which should always be you—the client. You are looking for a partner that will provide the opportunity to share in a long-term business relationship built on trust, expertise, innovation and success.

Training and Support

EDI is a complex subject, and why it is important to ensure that the EDI partner you choose offers expert training and support. Optimally, you want a trusted and caring group of easy to reach EDI experts to support you, offering premium training, onboarding and educational opportunities, as well. If you are managing your EDI in-house, you are not only looking for a solution to handle your EDI transactions, you also need the trained staff and expert support to maintain smooth operations.

Innovation

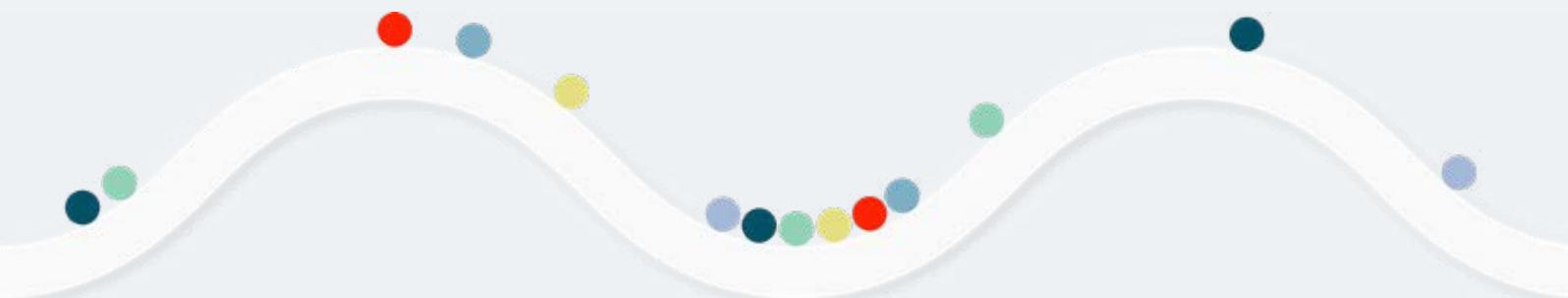
Investing in any new software solution prompts many questions regarding long-term support, sustainability, continued development, and investment in the solution by the EDI service provider. Your EDI partner should have a strong solution today, while continuing to invest in product enhancements and new offerings. Be sure to ask your potential providers about their product road map and their investment in future EDI technology.

Scalability

Your business is likely going to grow. Whether you are a small business with one to five trading partners, or a flourishing enterprise with hundreds or thousands of trading partners, the right solution should scale with you. When your business grows and your needs change, it is difficult to start this process of finding a provider again. It is time consuming and labor intensive. To eliminate those challenges, it is best to think long term when finding an EDI solution. Choose one that has a solution for every size of business. That way when you grow, they have a solution to fit your needs, as well as a proven process to ensure you are always in the best solution for every stage of the life of your business.

Efficiency and Operational Excellence

Once you have ensured 100 percent compliance through an automated or web-form process, it is time to consider driving supply-chain value through the entire organization. Be sure that the provider offers self-service tools to not only solve problems quickly, but also to enhance supply chain visibility and control. You want a proactive solution that identifies issues and challenges before they happen, without human intervention. These errors often go unnoticed in a traditional EDI solution and can bring heavy fines and chargebacks not to mention the inefficiencies involved in researching the issue. You want your EDI software to alert you of these issues when they happen or before so that you can continue to operate efficiently and keep costs of doing business lower.





Questions for Potential Providers

The value of EDI does not stop at the initial connection. In fact, EDI can help you to transform your business and achieve operational excellence. Following these steps can get you there.

Q. Has the technology kept up with modern standards?

Many EDI solutions have been on the market for decades in their current state. Look for an up-to-date, back-end database that supports current technology and is written in a supported code base.

Q. Ask to see a demo of the solution.

Seeing an EDI solution in action from setup to mapping to daily data visibility will help you determine if it can support your company's critical operations for years to come.

Q. Is the platform's dashboard intuitive and easy to use?

A dashboard allows you to use your EDI solution to monitor key data and errors to ensure your business workflows are being followed. An intuitive interface and the ability to quickly and easily find information will help you achieve greater efficiency and manage by exception. Also ask if there is an ability to create tailored views for individual users as this can be highly beneficial.

Q. How does the system alert me to errors?

Data errors cost your business money, can damage important customer relationships, and create additional ongoing work for the EDI coordinator. Your EDI interface should keep you informed of transaction status, alert you to possible problems, offer easy and accurate search and data repair functionality, and allow you to resend documents in a matter of seconds.

Q. How can your EDI system fit my unique needs?

Since most businesses have specialized processes or use customized systems, verify that the EDI solution can adapt to your needs. Many EDI solutions are rigid and offer basic settings that require custom development. Be sure business rules can be configured without custom programming to limit the total cost of ownership. If custom programming is needed, ask questions to understand the costs associated so you aren't surprised by hidden fees and charges.

Q. How can I onboard new trading partners?

Traditionally, adding a new trading partner has been a manual task with significant data entry and configuration. Be sure to ask potential providers about the onboarding process and if it is handled by the provider, EDI system end users, or by system administrators with technical expertise. Find out if document mapping can be done without going to the solution provider and if maps can be customized and configured based on specific processes.

Q. What are the solution's security capabilities?

To avoid intercepted data and vulnerabilities related to your data security, check with potential providers on what security methods are implemented in the proposed software solutions. Many times, a solution provider will have various protocols in place for both internal and external software users. Find out if the database is encrypted and if user access can be restricted by individual user level or through role-based security.

Finding the Best EDI Solution

What is EDI?

Electronic Data Interchange is a quick, safe way to transfer business documents.



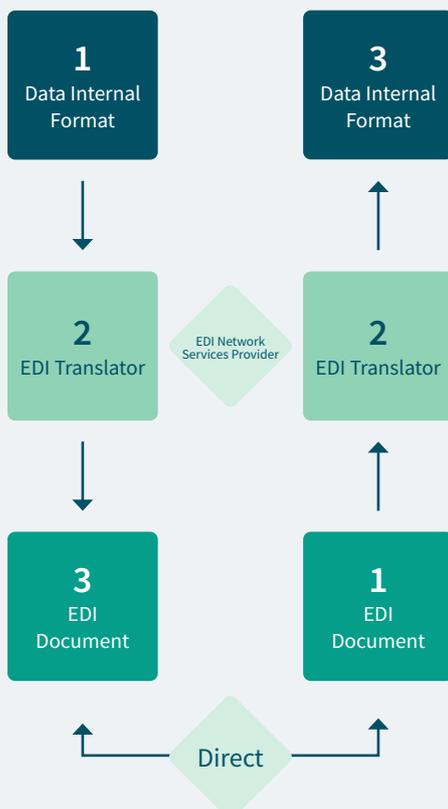
85%
of electronic
business transactions
use EDI

Why You May Need EDI?

- Customer requires it
- Compliance standards require EDI automation
- Manual processes result in mistakes & productivity loss

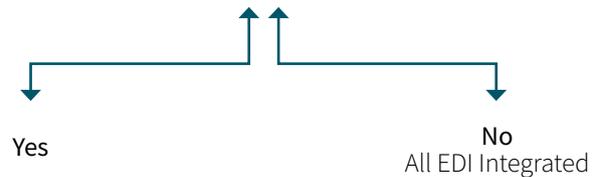
How does EDI work?

EDI Process Overview



Decide What Product is Best For You!

Need to create new EDI messages to respond to trading partners?



Do you need to integrate a subset of EDI messages, but still need to create EDI for some messages?

Yes
Web or Cloud Solution w/Integration

No
Web or Cloud Solution

Do you want to manage the EDI process?

Yes

No

Do you want to manage the EDI infrastructure?

Yes
Software Solution On-Premise

No
Infrastructure Hosted Solution

Do you have a large volume of transactions or very specific integration requirements?

Yes
>6 complex integration
Managed Enterprise Solution

No
1-5 complex integration
Managed Business Solution



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