

Are you interested in integrating EDI into your EPASS system but don't know where to start? This Pre-Integration guide has been created to help prepare your business to make the move towards EDI.



What's in this Guide?

The first section is a "plain English" explanation of what EDI is and how your business can benefit. The second section is a 3-Step checklist. Once you've completed each step, you are ready to begin your EDI integration.

What is EDI?

EDI (Electronic Data Interchange) is a standardized format for exchanging information between two companies electronically rather than using paper documents.

Think of it this way: you send your suppliers documents like purchase orders and invoices everyday. This means that someone needs to create these documents in EPASS and then somehow get them to the supplier: either via email, fax, or even mail. That's a lot of work!



EDI is like having EPASS talk directly to your supplier's computer system and exchanging those documents automatically, in a standard format, without any human needing to print or send anything.

What are the benefits of EDI?

- **It's faster:** No waiting for someone to print or send a document.
- **There's fewer mistakes:** No typos or lost paperwork.
- **It's cheaper:** Less manual work means lower cost.
- **It's more secure:** Data travels directly from EPASS to your supplier.



What do all these EDI numbers mean?

Something you might have noticed with EDI is that there is usually a three-digit number involved, such as EDI 850, EDI 810, EDI 846, and more! It can be a bit confusing!

These numbers are simply used to identify the purpose and contents of an EDI document that is exchanged between systems.

The good news is, you don't have to memorize every EDI number. You just need to know what is possible with EDI and what you want it to do for you.



EDI Checklist

Complete each step fully before moving on to the next. Once you've completed all three steps, you will be ready to start your EDI integration.

Step 1- Determine what you want EDI to do for you

The key benefit of EDI is that it can automate several aspects of your Purchasing processes. Some of those processes are:

- Creating Purchase Orders.
- Receiving acknowledgement that your PO has been accepted by the supplier.
- Updating the supplier to PO changes.
- Receiving invoices from your suppliers.
- Receiving a supplier's QOH or QOO for a product and an ETA shipping date.

If you're already familiar with EDI and have experience with using it, you may already know exactly what you want it to do.

But if you are new to EDI, the amount of information and technical jargon can be overwhelming.

We recommend that you start "small" with a single EDI document: creating Purchase Orders. (This document is called EDI 850). Once you've successfully included this EDI in your purchasing process, you can then consider adding other EDI documents.

Select each function that you would like to automate with EDI (We've already selected "Create Purchase Orders" for you!)

- ☒ Create Purchase Orders (EDI 850)
- ☐ Receive acknowledgement that the supplier has accepted your PO (EDI 855)
- ☐ Make changes to existing POs and update the Supplier (EDI 860)
- ☐ Receive invoices from Suppliers (EDI 810)
- ☐ Get a Supplier's QOH, QOO, and a shipping ETA for products (EDI 846)

Step 2 - Contact Your Suppliers

Now that you know what you want to automate with EDI, your next step is reaching out to your suppliers and confirming with them that they are willing to exchange EDI documents with you. Large suppliers, such as Whirlpool and Electrolux, already have the infrastructure in place for EDI and will be able to work with you quickly and with minimal effort. But smaller suppliers may be unfamiliar with EDI and unwilling to incorporate it into their current workflows.

Before Continuing, do the following:

- ☐ Use the AP-04 Supplier List report in EPASS to generate a list of your current suppliers and their contact details.
- ☐ Contact each supplier and explain:
 1. You are considering implementing EDI in your current purchasing process.
 2. You are confirming that they are already using EDI and have the infrastructure in place to accept and send EDI files.
 3. You will be working with a VAN to ensure that EDI files are exchanged in the correct formats.
 4. You want to use specific EDI documents (give them the EDI numbers from the previous section).

Once you've determined which of your suppliers are ready to work with EDI files, you are ready to move to the last step.

Step 3 - Contact EPASS Support

Phone EPASS Support at 1-888-629-4218 and explain to the Support Agent:

1. Your company is ready to integrate with EDI.
2. You want to start with creating purchase orders (EDI 850).
3. You've contacted your Suppliers and you have a list of the ones that are ready to exchange EDI files.
4. You are ready to give approval for setup fees.

EPASS Support will then begin the EDI integration process in EPASS. This involves scheduling some time with you to log into your EPASS server and making some configuration changes.



Support will also put you in touch with Commport, our EDI VAN partner. Together, EPASS and Commport will work closely with you to ensure that your EDI integration is set up and running smoothly.



Need Help or More Information?

Don't hesitate to contact EPASS Support for additional help with your EDI integration!

EPASS Support Toll Free: 1-888-629-4218

Email: support@epass.software



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