Elevate

Powered by EDI Support LLC

EDI Provider Evaluation Checklist ✅

1. Platform Demo & Implementation Process

Ask these questions to understand the provider's capabilities and how they manage onboarding:

☐ Can you give us a live demo of your EDI platform?

☐ Walk us through your full EDI setup and implementation process for a sample trading partner (e.g., Walmart or Amazon).

☐ How long does it take to get on your internal project schedule once we sign?

☐ Who handles the new trading partner testing — your team or ours?

☐ Does testing include integration with our ERP system?

☐ Is there an additional charge for ERP integration?

☐ How long does it typically take to go from testing to live with a trading partner?

☐ How long does it take for a mapping issue to be corrected once we are live?

☐ Do you host your EDI platform on your own servers, or do you use AWS/Azure?

Pro Tip: Look for providers who offer cloud-native, fully managed onboarding (not just a demo video). Modern platforms like Elevate host on secure, SOC 2-compliant cloud infrastructure for reliability and scale.

2. Internal Resources & Flexibility

Evaluate how much internal expertise you'll actually need:

☐ Do I need in-house EDI knowledge or staff?

☐ Can our team make EDI map changes, or does only your support team handle those?

☐ Is your platform self-service, fully managed, or hybrid?

Pro-tip: If you don't have EDI experts on staff, a managed-service model like Elevate eliminates technical overhead — mapping, monitoring, and testing are handled for you.

3. Support, Responsiveness & SLAs

These questions help you understand post-go-live support:

☐ What are your Customer Service SLAs (Service Level Agreements)?

☐ Do you support both email and live phone calls?

☐ What are your average issue response and resolution times?

☐ What is your escalation process for urgent support cases?

☐ What's your guaranteed platform uptime (SLA %)?

☐ What are your support hours and time zone?

☐ Do you use a generic support email, or do we get one dedicated to our company?

☐ Is there a direct phone number for support?

☐ How many people are on your support team?

☐ Do you use a ticketing system with generic email responses, or do we get direct contact with assigned reps?

Pro tip: Good providers should commit to clear SLAs — e.g., 2-hour average response, 48-hour resolution, and 99.9% uptime.

4. Cost Structure & Transparency

Always ask for a full breakdown — not just a quote.

☐ What is the one-time setup fee to get on your platform?

☐ What's the one-time fee to add a new trading partner?

☐ Is testing and implementation included?

☐ What's the monthly fee breakdown?

☐ What's the per-document fee, and how many documents are included in my plan?

☐ What is *not* included in the cost (hidden or variable fees)?

☐ Is ERP/WMS/TMS integration included, or charged separately?

☐ Is daily error tracking included in the base plan?

☐ Are phone calls and meetings with prospective trading partners billable?

Pro tip: Ask for all fees in writing. Many legacy EDI vendors charge extra for mapping updates, adding new partners, or error tracking. Modern providers like Elevate include these in one transparent pricing plan.

5. Monitoring, Alerts & Error Handling

Understand how the provider prevents costly disruptions.

☐ How do you detect and notify us about:
- Unacknowledged EDI documents (997s)
- Communication failures (AS2/SFTP drops)
- Rejected documents or 824/864 error notifications

☐ Are alerts automated or monitored by real support staff?

☐ Is there proactive monitoring for failed transactions?

Pro tip: Modern systems provide real-time dashboards and automatic alerts so you know about issues before your partners do.

6. Contract Terms & Flexibility

Clarify how flexible the relationship really is.

☐ When does my contract renew?

☐ Does my contract extend automatically when I add new trading partners?

☐ What's the cancellation or migration policy?

☐ Who pays for chargebacks if an issue is caused by the EDI platform or mapping errors?

Pro tip: Avoid auto-renewing contracts — choose month-to-month or yearly flexibility. Elevate, for instance, is fully contract-free with no renewal traps.

7. References, Reputation & Reliability

Always verify their experience and credibility.

☐ Can you share references or contact details for clients who have similar trading partners?

☐ What is your average customer tenure?

☐ What do your reviews say about pricing transparency, uptime, and support?

Pro-tip: Talk directly to at least one current customer before signing. Ask how quickly issues are resolved and whether pricing has stayed consistent.