Foundational
e-Business Services

EDI PROVIDER MIGRATION CHECKLIST

Everything to gather, confirm, and ask before you switch EDI providers — so the migration itself is boring, not risky.

1. Before You Give Notice

Gather these while your current relationship is still normal — some providers become less responsive once you've announced you're leaving.

- [ ] **Map ownership confirmed.** Ask whether your translation maps are contractually yours. If not, request the mapping specifications and sample documents for every partner and document type instead.
- [ ] **Complete trading partner inventory exported.** Every partner, every document type exchanged (850, 855, 856, 810, etc.), and each connection method (VAN, AS2, SFTP).
- [ ] **Historical transaction data pulled.** Recent months of real inbound and outbound documents — these become your test fixtures during migration.
- [ ] **Contract exit terms reviewed.** Notice period, early termination fees, and — critically — your auto-renewal date.
- [ ] **VAN qualifier and ID noted.** Whether you keep your existing IDs or issue new ones is a real decision point in the migration plan.

2. The Migration Sequence

Track your new provider against each phase. If a step is being skipped or rushed, that's worth a direct conversation.

- [ ] **Inventory & scoping complete.** Every partner, document flow, and ERP touchpoint mapped, with a partner-by-partner cutover sequence defined.
- [ ] **Maps rebuilt and validated.** Tested against your real historical documents — not just sample or synthetic data.
- [ ] **Parallel operation running.** Your current provider keeps processing production traffic while the same documents are compared side-by-side on the new environment.
- [ ] **Cutover proceeding partner-by-partner.** Never all at once. Each partner verified live before the next one moves.

☐ **Hypercare monitoring active.** Elevated monitoring continues through your first full business cycle — including month-end or seasonal peaks.

3. Questions to Ask Any Provider You're Considering

- Who owns the maps you build for us — and what do we receive if we ever leave *you*?
- Will you run parallel with our current provider before cutover? For how long?
- Do we keep our existing VAN qualifier and IDs, or will partners need to update routing?
- Who specifically handles our migration — and who handles our account after it?
- What does the escalation path look like when a document fails before a customer's cutoff?
- How is pricing structured as we add partners and volume?

Weighing a switch? Bring this checklist — and your current contract — to a conversation with Foundational. We'll tell you honestly what your migration would involve, including whether now is the right time to do it.

Talk to an EDI specialist: getfoundational.com/contact | 412-653-2463