Data Masons

EDI Solution Evaluation Checklist
Valuable Questions to Differentiate Between EDI Options

Evaluating EDI solutions can be a daunting task with multiple providers claiming the same capabilities – integration, outsourcing, ease-of-use, etc. However, the truth is there is often a wide gulf between the perception created by a salesperson and the reality that is delivered. If you don't ask all of the right questions, you can be left with unpleasant surprises, including unpredictable fees and no real integration. Armed with the right questions, you can separate the facts from hype.

Use the Evaluation Checklist below to go beyond the product data sheets and software demonstrations, and uncover the distinguishing features of each solution, and solution provider, so that you can make the right decision for your company.

Get started and put your EDI solution providers to the test!

Application/Service Provider Feature	Data Masons	Embedded Solution	Cloud-based solution
Integration			
Did you see a software demonstration showing real data integration into and out of the ERP?	✓		
Who created the integration and does the EDI provider support it, as opposed to requiring a 3rd-party to handle integration or translation?	✓		
Is the offering an "out of the box" solution or a tool, such as BizTalk or Gentran, where you have to customize the tool to integrate it?	✓		
Does the solution integrate without introducing customizations to the host ERP?	✓		
How does the provider support ERP upgrades and/or service pack in-stalls? What does that process look like?	✓		
Is the solution provider promising to provide files for you to integrate and asking for files in return, as opposed to taking full ownership of the integration?	✓		
Can the solution integrate to disparate systems using a variety of transport methods such as RESTful Services, OData endpoints, SOAP Webservices, HTTPS, File Exchanges and Message Queues?	✓		
Is there an audit framework to validate transactions between partners, your ERP and then back to the partners?	✓		
Is the solution architected for cloud but deployable in private cloud environments based on security preferences?	✓		

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Microsoft Dynamics 365	Microsoft Dynamics AX	Microsoft Dynamics NAV	Microsoft Dynamics GP
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Application/Service Provider Feature	Data Masons	Embedded Solution	Cloud-based solution
Technology			
Can the solution be deployed in the cloud? If deployed in the cloud, is there any local software component?	✓		
Can the solution be deployed on premise?	✓		
Is the solution scalable? Is it multi-threaded?	✓		
Can you access the EDI data with other tools such as SSRS and SQL Management Studio?	✓		
Has the solution earned any CfMD accreditation?	✓		
Is the solution designed to be deployed to functional users or is the IT Department expected to manage the integration and exception handling?	✓		
Cost of Ownership			
Does the solution require EDI resources on staff to manage?	✓		
Are you able to connect directly with your trading partners, therefore eliminating unnecessary transaction fees?	✓		
Can you save money by integrating your supply chain to your ERP solution?	✓		
Compliance			
If you introduce software modifications into the ERP environment, does the provider still own the integration of the EDI solution or is it your problem?	✓		
Does the solution provider offer interim support for legacy applications?	✓		
Does the solution provider offer a fully-outsourced compliance management option?	✓		
Does the solution provider offer the option to do your own mapping and compliance?	✓		

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