



Guide to Integrations

Integrate EDI with your ERP, inventory management and 3PL systems to maximize efficiencies and boost your bottom line.



INTRODUCTION

Maximize Efficiencies, Boost the Bottom Line

Your business has systems. Lots and lots of systems. Three of the most important? Your ERP, your inventory management system and your 3PL/WMS.

Those systems rely on data. But far too often that data is siloed, leading to inconsistencies. Those inconsistencies can lead to uninformed decision-making. And when your business systems aren't on the same page, let alone speaking the same language, you feel it in your bottom line.

But there's a game-changer hiding in plain sight that can help businesses like yours get more out of these systems, maximize efficiencies and boost the bottom line:

EDI.

EDI, or electronic data interchange, is the electronic communication of business transactions between suppliers and trading partners. It used to happen via fax. Today, as you likely well know, it's powered by cloud-based software.

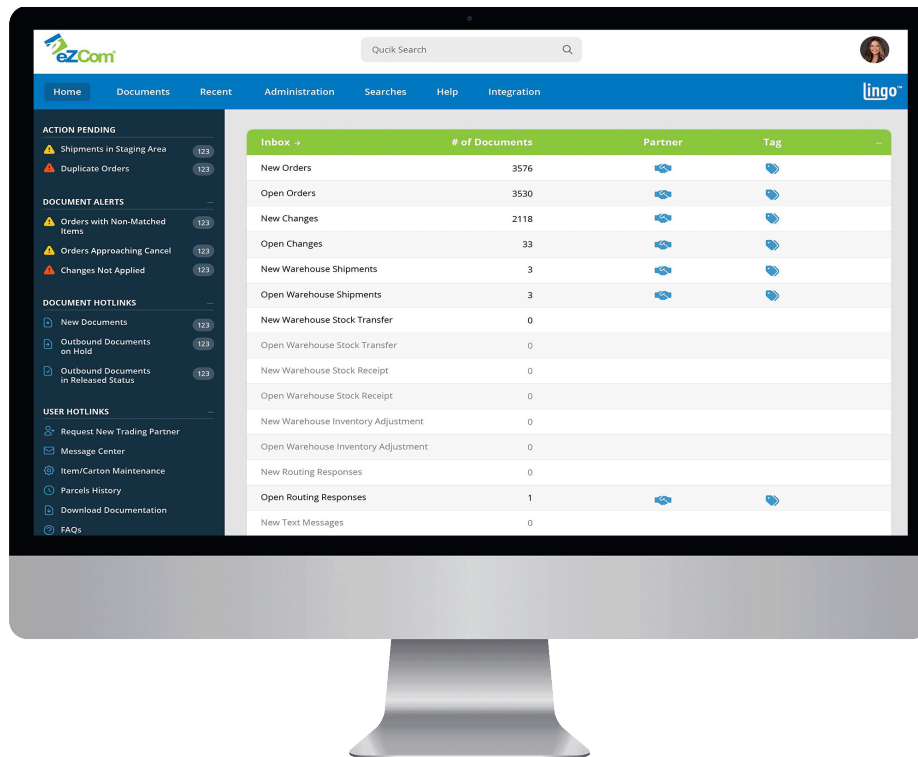
But beyond facilitating communication between you and your trading partners, EDI can integrate with all of your major business systems. It serves as the connective tissue that unlocks siloed data and keeps it flowing seamlessly.

In this guide, we'll walk you through the benefits and requirements of integrating your EDI system with your ERP, inventory management and 3PL/WMS systems, along with some of the most common hurdles and pitfalls to watch out for.

Let's get started.

But First

INTRODUCING EZCOM'S LINGO TECHNOLOGY PLATFORM



Trusted by thousands of suppliers worldwide, Lingo is our award-winning EDI platform designed to simplify and automate your trading partner relationships and help you grow your business. Featuring a robust range of capabilities, Lingo is built and maintained to comply with the internationally recognized EDI file standards, X12 and EDIFACT, and maps to hundreds of trading partners - from Amazon to Zulily. Additional features include tiered user permissions, document tags, custom reporting options, batch processing, validation checks to prevent chargebacks, U.S.-based support and training, and, yes, powerful integration capabilities.

With Lingo, suppliers can seamlessly connect to shipping providers and easily generate and print labels, helping turn a time-consuming requirement into a genuine competitive advantage.

Lingo has consistently been ranked a leading EDI provider, earning multiple accolades for usability, setup, integration capabilities and more.

STRATEGY

HOW TO APPROACH AN INTEGRATION

Integrations aren't easy. But with the right strategy and the right partner, they can be designed and executed efficiently and effectively. The following is a recommended checklist we suggest suppliers review prior to beginning an integration.

- 1 Make Sure Custom Really Means Custom.** Custom integration solutions take a consultative approach. Consultative approaches take people and expertise. Many off-the-shelf integration solutions may claim custom capabilities. Validate accordingly.
- 2 Consider Growth.** An EDI integration must have the future in mind. As you add new trading partners or open up new channels, will your integration be able to scale?
- 3 The Black Box Effect.** Every integration should be about data accuracy, automation and saving time. But each integration should also be about visibility, ensuring that you, the customer, can see everything that happens. Oftentimes EDI providers will eliminate customer access to the EDI platform when integrating with an ERP. With eZCom, customer access to Lingo is always available - before, during and after an integration.
- 4 Support That's Truly Supportive.** After an integration launches, you may have questions or need support. Knowing that you have your integration partner on-call and accessible provides meaningful peace of mind.
- 5 Understand Partner Accountability.** Third party vendors that develop an integration tend to do so at arm's length to minimize risk. But that can have a real impact on your integration and any ongoing support needs. Make sure you gauge your integration partner's accountability to the project and beyond.
- 6 Automation That's Actually Automatic.** The whole point of integrating your EDI with your ERP, inventory system or 3PL/WMS is to automate, ensure data accuracy and save time. But if an integration requires even a few manual tasks per day, it can add up to hundreds of hours per year. Know exactly what your prospective partner means by "automation."
- 7 Consultative Collaboration.** Your integration partner should utilize best practice solutions but also bring fresh thinking and problem-solving skills to your project.

GETTING STARTED

OBJECTIVES, REQUIREMENTS, TOOLS

When integrating your ERP, inventory management and 3PL/WMS systems with your EDI platform, it's mission critical to start with the right objectives, documentation and tools.

For each of these integrations, automation is the goal because automation ensures data is accurate while accelerating the time it takes to process it.

Looking at documentation, it's important to clearly define which EDI documents will be involved in each integration.

In the case of ERP - EDI integration, EDI documents typically required include:

- | | | | |
|---|-----------------------------------|---|-----------------------------|
| 1 | Purchase Order (EDI 850) | 5 | Invoice (EDI 810) |
| 2 | Order Change (EDI 860) | 6 | Remittance Advice (EDI 820) |
| 3 | Order Acknowledgement (EDI 855) | 7 | Inventory Advice (EDI 846) |
| 4 | Advance Shipping Notice (EDI 856) | | |

A 3PL/WMS - EDI integration most often requires the following EDI documents:

- 1 Warehouse Shipping Order (EDI 940)
- 2 Warehouse Shipping Advice (EDI 945)
- 3 Warehouse Stock Transfer Shipping Advice (EDI 943)
- 4 Warehouse Stock Transfer Receipt Advice (EDI 944)
- 5 Warehouse Inventory Adjustment Advice (EDI 947)

Finally, the inventory management system - EDI integration typically only requires the following EDI documents:

- 1 Purchase Order (EDI 850)
- 2 Inventory Advice (EDI 846)

Next, it's important to consider what tools power the data transfer of these integrations. With Lingo, suppliers can transfer data in a variety of ways to meet their specific requirements:

- ◆ Lingo's RESTful API which contains webhooks, is the primary data transfer method utilized for all integrations. Our internal team commonly employs the API for completing integrations and provides an API-enabled sandbox account, comprehensive documentation, and US-based engineering support.
- ◆ File Transfer Protocol (FTP) and Secure File Transfer Protocol (SFTP). These methods enable smooth and secure data transmission, allowing customers to seamlessly exchange information between different servers.
- ◆ Lingo File Connector. Our customizable tool offers the ease of uploading and downloading files directly from your local drive to our system. It's designed for an effortless, user-friendly experience.
- ◆ Dropbox Integration. Lingo integrates with Dropbox, making it easy for customers that rely on the cloud storage provider to share and receive files.

Why integrate your ERP with your EDI platform?

Integrating your ERP with your EDI platform automates numerous data entry processes that are normally prone to human error, dramatically improving efficiencies, data accuracy, reporting and forecasting.

Why integrate your inventory management with your EDI platform?

Integrating your inventory management system and EDI platform automates and ensures the accuracy of inventory reports to meet the compliance standards of your trading partners.

Why integrate your 3PL/WMS with your EDI platform?

Integrating your 3PL/WMS and EDI systems ensures the seamless flow of data, increases supply chain efficiency and avoids costly chargebacks and slowdowns.

STRATEGY, SUPPORT, SUCCESS

Whether you're integrating your EDI platform with your ERP, inventory management system or 3PL/WMS, you're not left to your own devices when you work with eZCom. We know that every organization and its operations are unique. This means there is no one-size-fits-all approach for integrations.

Our approach to integrations is consultative and collaborative. We work to understand your current and desired systems and workflows, ensuring that the proposed integration is the optimal solution.

Each integration begins with a Discovery Phase in which our integration team works with you to define end goals and requirements. We have a number of pre-built standard integrations with systems such as NetSuite and QuickBooks that can typically be set up within 48 hours. For integrations that require more customization, our in-house development team joins the project to assess, develop a scope, establish a timeline and provide an estimate.

Once the integration is developed, our integration team will lead testing and training, ensuring that your team is positioned for success.

Finally, our U.S.-based customer support team is available to provide guidance and troubleshooting. Simply call 201-731-1800 and select Option 2, or email support@ezcomsoftware.com.

"Using eZCom software has made the integrations between retailers and my warehouse a seamless and automated process, which is needed in today's market. They are only too happy to provide explanations as well as emails with straightforward instructions to follow. Five stars!!!"

Orin M
Business Analyst
July 2023 via G2.com

EXAMPLES

INTEGRATIONS IN ACTION

eZCom clients have found it extremely helpful to “see” sample integrations. The following diagrams detail the flow of EDI documents in ERP, inventory management system and 3PL/WMS integrations. Please note that all workflows are unique and tailored to specific customer requirements.

ERP Integration



When an order is received in Lingo, whether it's through an EDI 850 or an online order, it is automatically sent to the ERP system.

This integration, illustrated above, automatically synchronizes inventory updates. Once the order has shipped, Lingo seamlessly retrieves the ASN (EDI 856) or, in the case of an online order, the tracking number.

This entire process happens behind the scenes, eliminating the need for users to log into Lingo or leave the ERP platform.

For EDI transactions, the ERP system automatically generates an invoice, which is seamlessly pulled into Lingo and then sent to the retailer, eliminating the need for any member of your team to step outside the ERP environment.

Lingo perpetually works in the background, performing validation checks and sending notifications if any document transmission fails.

3PL/WMS Integration



In the 3PL/WMS - EDI integration, orders are received from the retailer via the EDI 850 or from an online eCommerce platform and then appear in Lingo. The customer has the option to review these orders in Lingo or have them automatically sent to the warehouse for fulfillment via the EDI 940 (Warehouse Order). Once the warehouse is prepared to ship, it sends an EDI 945 document back to Lingo. At this point, the customer can manually verify the shipment and generate the ASN (EDI 856) or choose to automate this process. Most customers prefer to automate the generation of the invoice (EDI 810), which is based on the information provided in the ASN (EDI 856). This ensures that if any items are short shipped, the invoice will still be accurate.

Lingo Shipping Connector

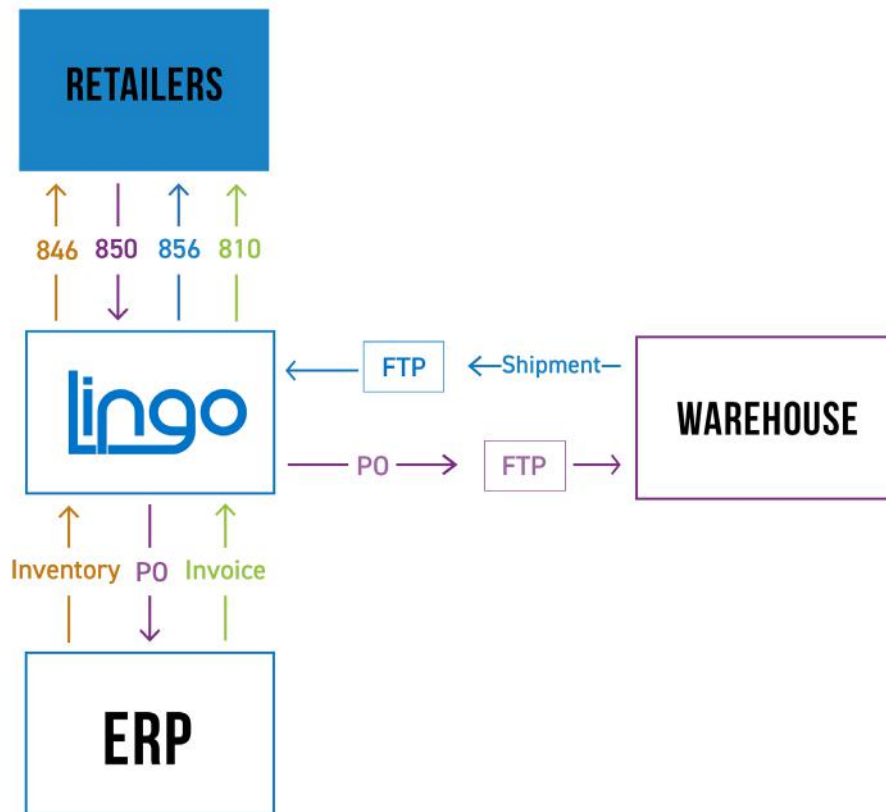
One of our most popular integrations, Shipping Connector provides a seamless connection between Lingo and major shipping providers. With this built-in feature, Lingo can automatically generate shipping labels directly from shipping providers,

using the data received on orders and retailers' account information, requirements and instructions. Shipping data is automatically integrated back on to the ASN, providing an integrated way to print shipping labels in multiple formats and layouts to match customers' printers and label stocks.

This integration significantly enhances efficiency, saving valuable time and minimizing errors, making it particularly advantageous for dropshipping customers. Moreover, even if you're not utilizing one of the major shipping providers, we offer the flexibility to develop a custom solution tailored to meet your specific requirements.



ERP & 3PL Integration



One of the most significant challenges in integrating multiple systems is determining the optimal workflow and implementation process. In this 3PL/WMS - ERP - EDI integration, Lingo serves as the central hub. Its established connections with trading partners significantly reduces complexity. All that remains is to design a workflow and connect the 3PL and ERP into one cohesive system.

In the illustration above, orders received through EDI or online channels are initially captured within Lingo and sent to the ERP system. Once the order is verified, it is seamlessly transmitted to the WMS using a file connector. When the warehouse is prepared to fulfill the order, the WMS relays the fulfillment data back to Lingo which then pushes the information into the ERP. Simultaneously, Lingo is automatically sending the required EDI and non-EDI information back to the retailer or digital store, completing the order process.

By utilizing Lingo as the central hub for these integrations, suppliers can streamline the entire process, simplify workflows and seamlessly connect the various components of their 3PL and ERP systems. This ensures efficient data flow and facilitates smooth operations throughout the supplier's entire business ecosystem.

CONCLUSION

AUTOMATE, AUTOMATE, AUTOMATE

The more automation you have in place amongst your EDI, ERP, inventory management system and 3PL/WMS systems, the more time you will save. You'll experience fewer errors, fewer chargebacks, a bolstered supply chain and strengthened trading partner relationships.

With over two decades of EDI and EDI integration experience, our team of dedicated, personable integration, development and support specialists are ready to help your organization reach new levels of success.

To learn more, call 201-731-1800, Option 1, or send an email to sales@ezcomsoftware.com

