



# A Guide to Acumatica EDI Integration



# INTRODUCTION

## Scale Efficiencies, Maximize ROI

Acumatica is a robust ERP that centralizes critical business information and drives efficiencies. But most organizations don't leverage it to its full potential.

That potential lies in its ability to integrate with other business processes like WMSs, accounting systems and EDI.

In this guide, we'll cover the benefits of integrating EDI with Acumatica and what to expect before, during and after an integration. We'll also detail specific ERP-EDI integration flows to help you think through your unique requirements.

When your EDI system is custom integrated with Acumatica, efficiencies will scale, error rates will plummet and you'll know that you're getting the most out of your investment.

## WHY EZCOM

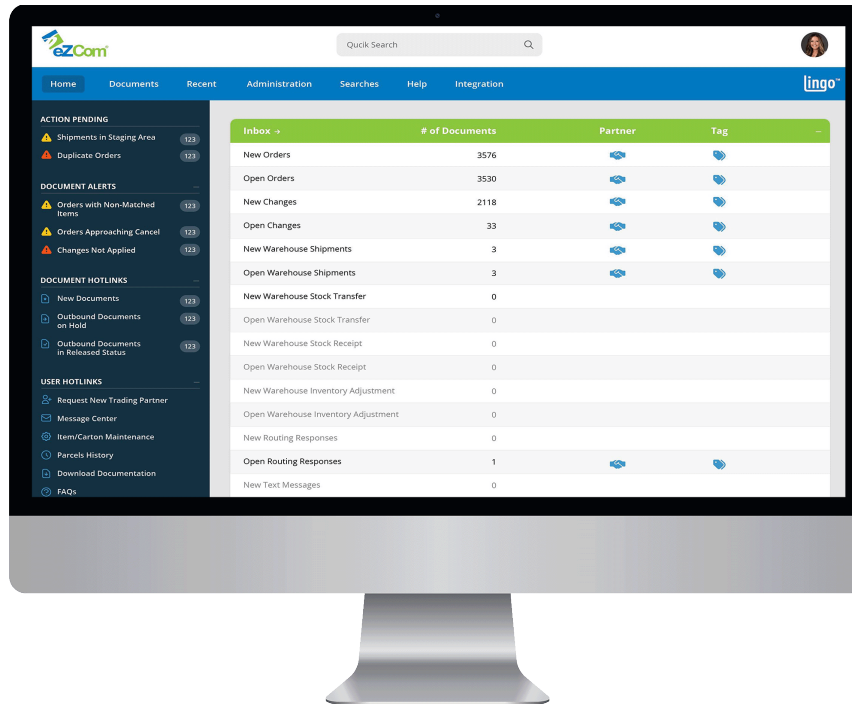
eZCom Software helps brands turn EDI into a competitive advantage. We offer modern, SaaS-based EDI and order processing solutions, professional setup and integration, and responsive, US-based support to deliver a best-in-class experience.

As retailers large and small mandate EDI transactions as a pre-requisite to joining their supply chain, suppliers are under pressure to adopt EDI whether they have the infrastructure to support it or not. Our flagship platform, Lingo, is the first enterprise level SaaS B2B application that gives SMBs the tools they need to successfully manage the EDI aspects of their supply chain process. The platform is fully cloud-based, eliminating the need for expensive hardware and software investments and its proprietary architecture supports multiple translation and communications protocols. Lingo also integrates seamlessly with major ERPs, accounting and warehouse management systems and ecommerce platforms, syncing data in real-time. The result is improved efficiencies by up to 90%, reduced complexities and fewer errors.



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.

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.

## Custom Integration

# WORK THE WAY YOU WANT TO WORK

Every organization is unique, with its own products, inventory management, invoicing methods and shipping processes. Add to this the diversity in legacy processes, workforce types, and company locations, and it's clear that a one-size-fits-all approach to integration simply won't suffice. What works for one company may not yield the best results for another.

When beginning an Acumatica-EDI integration, it's crucial to conduct a thorough examination of your workflow. Your team shouldn't have to contort its processes to fit into Acumatica; instead, the right integration should be tailored to meet the specific needs of your company.

# YOUR EDI REQUIREMENTS ARE UNIQUE. HANDLE THEM IN THE MOST COST-EFFECTIVE, EFFICIENT WAY

Acumatica is a robust platform known for its flexibility. Given that both your business and your trading partners have specific EDI requirements, you might need to add new documents, records and fields to your Acumatica system. While integration can facilitate this, it can also become costly to develop and maintain. Moreover, evolving requirements or new customer additions can make staying current both complex and time-consuming.

After researching your company and its processes, an experienced integration partner should offer solutions that are both custom and cost-effective. While many companies prefer to operate entirely within Acumatica, others might opt for an integration that allows them to work within Acumatica while also handling specific EDI requirements externally.

Bottom line, a skilled EDI-ERP integration partner will ensure you can work the way you want to work.

## Making The Case

# WHY INTEGRATE EDI AND ACUMATICA?



The benefits of integrating your EDI system with an ERP like Acumatica are quite tangible and can have real impact.



Integration means automation. Automation drives data accuracy, all but eliminates manual data entry, reduces the occurrence of errors and saves real, measurable time.

When you integrate your EDI system with Acumatica, business cycles shorten and supply chain visibility becomes even clearer. Your team can focus on growth strategies and strengthen trading partner relationships.

# WHAT TO EXPECT FROM AN ACUMATICA EDI INTEGRATION



Your integration should seamlessly incorporate key EDI and eCommerce documents into Acumatica, including:

 Sales Order (EDI 850)  
 Invoice (EDI 810)

 Inventory Sync (EDI 846)  
 Shipment (EDI 856)

Integrating all your orders into Acumatica is crucial, and this includes incorporating various EDI documents. However, not all integrations are comprehensive. Some might be quite basic. This can lead to limited EDI capabilities within Acumatica, potentially forcing you to work outside the system or resort to manual data entry more frequently than anticipated.

To prevent this, take proactive steps early in the integration process:

-  Ensure clear communication regarding the extent and detail of the integration.
-  Find out which EDI documents are included, the feasibility of adding more in the future, and whether orders from other sales channels that don't use EDI can also integrate seamlessly into Acumatica.

Remember, integration is a complex process, and achieving optimal results depends on establishing clarity with your integration team from the start.

## Integrating For An Omnichannel World

# WHAT ABOUT INTEGRATING ORDERS FROM ONLINE MARKETPLACES AND ECOMMERCE STORES?



In today's omnichannel landscape, most brands sell online to accelerate growth. A key question is whether these internet-based transactions are automatically integrated into Acumatica post-EDI integration. Are orders from channels that don't use EDI seamlessly synchronized into Acumatica? Is the shipping process optimized for efficiency? Can you easily track the history of an order?

When importing data from various channels, it's important that this information is formatted consistently for integration into your Acumatica environment.

Working with a skilled integration partner makes this possible. Your integration partner should understand your specific requirements, ensuring that adding new sales channels is a straightforward process. Establishing connections that allow new data to integrate smoothly with your existing operations is how you plan for future growth.

## Our Approach

# HOW EZCOM HANDLES INTEGRATIONS

Next, it's important to consider what tools power the data transfer to and from Acumatica. 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.

**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.

In addition, we collaborate with various system APIs to construct integrations. While we utilize Acumatica's RESTful API to connect our Lingo system, we also offer the previously mentioned methods for integrating additional systems, such as a 3PL. This flexibility enables us to develop customized solutions that address the specific requirements of each client, ensuring seamless integration and efficient data management across different platforms.

## In Practice

# EXAMPLES OF CUSTOM EDI-ERP INTEGRATIONS

As no two EDI-ERP integrations are quite the same, the following examples illustrate various Acumatica integrations designed to provide a seamless workflow with minimal disruption.

An important benefit of Acumatica is its flexibility. A thoughtful, custom integration lets you get the most out of your system and the substantial investment you have made in it.

Acumatica has powerful tools for analytics. You won't get the most value from them if your EDI and order management is not fully integrated.



# COMPANY A

## Everything Runs Through Acumatica



For Company A, the integration of Orders and Invoices from Lingo to Acumatica is designed to be straightforward and efficient. This common setup focuses on the essential transfer of data between the two systems, with a specific consideration for the role of the 3PL in the logistics process.

1. **Order Receipt and Processing.** As orders are received through Lingo, they are automatically transferred to Acumatica. This ensures a seamless flow of order data into the system, facilitating efficient order management.
2. **3PL Interaction.** The 3PL partners are given access to Lingo. They can log in to input or upload shipment information directly into the system.
3. **Invoice Generation and Synchronization.** Invoices generated in Lingo for these orders are then synchronized with Acumatica. This synchronization ensures consistency and accuracy of invoice data across both platforms.
4. **Streamlined Workflow.** The entire process, from order receipt to shipping, is designed to be user-friendly and efficient. Company A's staff primarily interacts with Acumatica, while the integration with Lingo and the 3PL's involvement run smoothly in the background.
5. **Real-Time Updates and Reduced Complexity.** The system ensures real-time updates of order and shipping information in Acumatica, keeping the data current and accurate. This setup reduces the complexity of the operations, focusing on the core aspects of order processing and invoice management.

This setup for Company A not only streamlines the integration of Orders and Invoices between Lingo and Acumatica but also incorporates a simplified method for 3PL partners to contribute shipping information directly through Lingo. This approach ensures a cohesive and efficient workflow, allowing Company A to focus on their core business activities without the need for complex software interactions or additional training.



## COMPANY B

### High Complexity, Multiple Sale Channels



Company B's operations were intricate, and they were keen on maintaining efficiency without introducing new software that could complicate workflows or require additional staff training. The company's objective was straightforward: **to leverage Acumatica to its fullest, without depending on any external systems.**

The eZCom Discovery Team embarked on a thorough analysis of Company B's processes, leading detailed discussions to understand preferences and workflows. The team ultimately learned that the company was also using Acumatica to power its Warehouse Management System (WMS), necessitating warehouse staff to access Acumatica for document retrieval.

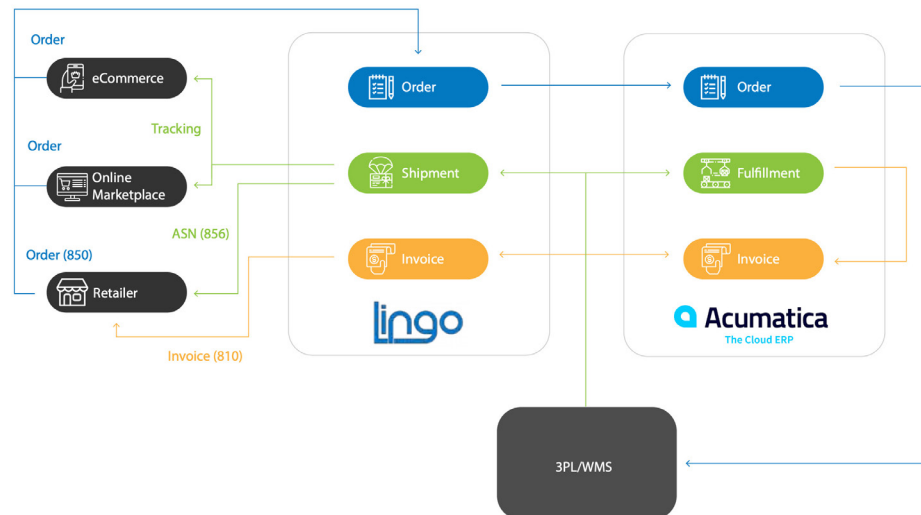
The integration process was meticulously planned and executed as follows:

1. An order is received, either through EDI 850 or from an online channel, directly into Acumatica. The warehouse team is immediately notified, processes the order, and handles shipping, all within the Acumatica environment. Inventory levels are automatically updated in real-time.
2. Concurrently, Lingo is configured to automatically retrieve the Advanced Shipping Notice (ASN) for EDI orders (EDI 856) or the tracking number for online orders. This process happens entirely in the background, eliminating the need for Company A's staff to interact with Lingo or step outside the Acumatica platform.
3. For EDI transactions, the invoice generation is seamlessly integrated within Acumatica. The invoice data is automatically transferred to Lingo and then forwarded to the retailer, ensuring that all operations remain within the Acumatica ecosystem.

Throughout this process, Lingo functions in the background, conducting validation checks and issuing alerts if any document fails to transmit. However, this does not impact Company A's workflow, as their team continues to operate exclusively within Acumatica, without the need to access Lingo or any other external system. This integration ensures a streamlined, efficient workflow, fully leveraging the capabilities of Acumatica while keeping the operations simple and user-friendly for Company A's staff.

# COMPANY C

## Centralize Operations, 3PL/WMS Integration



After a thorough evaluation of Company C's workflow, the integration team developed a tailored solution. Here's how the process was structured:

1. Orders, whether received via EDI or online channels, are initially processed in Acumatica. Once these orders are confirmed and verified, they are transmitted to the 3PL's WMS through a robust API connection.
2. As the 3PL's warehouse prepares an order, fulfillment details, including tracking numbers, are sent to Acumatica and Lingo using separate APIs. This ensures accurate and synchronized data updates across both systems, while maintaining distinct communication channels.
3. Lingo then takes over to dispatch the Advanced Shipping Notice (ASN) to the retailer or the tracking information to the online platform. This ensures that all stakeholders are kept informed about the order status.
4. Through the Invoice Sync process, an invoice is simultaneously created in both Lingo and Acumatica. Following this, the integration system identifies the corresponding invoice in Acumatica that matches the one in Lingo. It then extracts the invoice number from Acumatica and updates the Lingo invoice with this information, ensuring seamless synchronization between the two systems.

This integration strategy allowed Company C to maintain its operations primarily within Acumatica, despite the involvement of an external 3PL and its WMS. The use of APIs ensures smooth data flow between Acumatica and the WMS, while Lingo acts as a bridge for EDI and tracking information, maintaining a streamlined and efficient process. This setup not only optimizes Company B's operational efficiency but also keeps their system simple and manageable, aligning with their goal of operating exclusively within Acumatica.

## BOTTOM LINE

**A well-executed Acumatica-EDI integration can yield significant return on investment, enhancing supply chain efficiency, minimizing errors, and saving real time and money.**

Before embarking on an integration project, it's crucial to ask pertinent questions of your service provider. Consider whether the integration aligns with your operational preferences. Is the development going to be handled in-house, or outsourced to a third party? Does the solution effectively combine data from EDI transactions with orders from online channels?

Every company is unique, and thus, the integration solution should be tailor-made to fit your specific needs. It's important to choose a team that invests time in understanding your business processes and develops a solution that's precisely suited to your company's requirements.

To learn more, reach out to one of our Acumatica integration specialists. Call 877-765-3564 or send an email to [sales@ezcomsoftware.com](mailto:sales@ezcomsoftware.com) and tell us about your needs.

