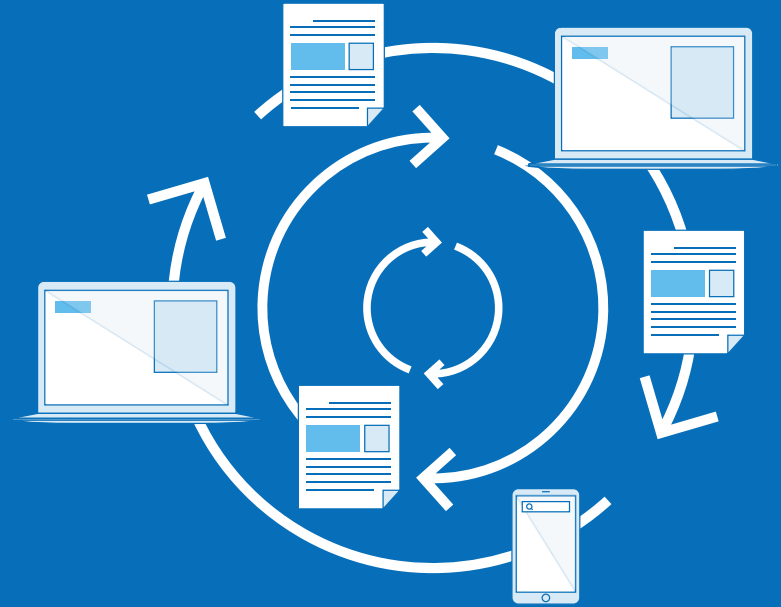


# Streamlining Retail Operations: Harnessing EDI for Cost Efficiency



# Housekeeping



**Keep mic muted  
when not speaking**



**Keep video off to  
avoid bandwidth issues**



**PPT Decks &  
Follow-up Survey will be  
emailed out after  
presentation**



**Any questions logged  
in the chat during the  
presentation will be  
addressed at the end**

# Introduction to EDI

What is it and what are the key benefits?

Thomas York, President  
*York Worldwide Technologies*

# EDI Benefits for Retailers

Mark Paquette, Tier 2 Development Manager  
*York Worldwide Technologies*

# Benefits of EDI

**\$10-  
\$40+**

Cost of manually  
processing each  
document

- Slash processing costs
- Improve accuracy
- Greater customer satisfaction
- Better cash management
- Reduce turnaround time

# Topics

- Speed and efficiency
- Accuracy
- Visibility
- Cost savings and profitability
- Competitive advantage

# Speed and efficiency

**50-  
80%**

Time savings

**60%**

Cost savings

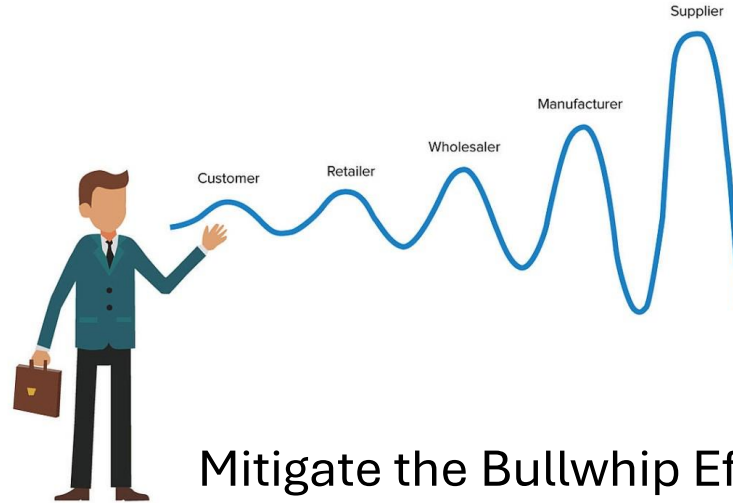
**25%**

Faster delivery times

# Accuracy

99%

Reduction in errors



Mitigate the Bullwhip Effect



# Visibility

- Real-time data = increased visibility
- Document tracking = quality control



# Cost savings and profitability

**20-  
40%**

Cost savings

**20-  
30%**

Reductions in inventory  
buffer costs

**10-  
15%**

Increase in customer  
satisfaction

# Competitive advantage

- Faster delivery times
- Lower costs
- Improved customer satisfaction

# Additional statistics

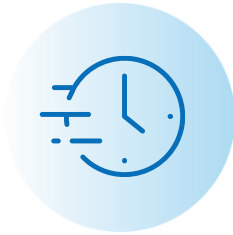
- Global EDI market to reach \$19.6 Billion by 2027
- 80% large businesses / 60% small businesses in U.S. use EDI
- EDI facilitates over 10 Billion transactions/year globally
- EDI's top industries:
  - Retail
  - Manufacturing
  - Healthcare
  - Logistics

# What EDI Integrations should a retailer get started with?

Chris Smith  
*Horizon Retail Solutions*

# There are over 300 different EDI standards

Horizon integrates with a handful of EDI standards that provide tremendous benefits to retailers.



**Speed**



**Accuracy**



**Communications**

What EDI Integrations should a retailer get started with?

# What EDI Integrations should a retailer get started with?

- Purchase Orders: **850**
- Reverse Purchase Order / PO Acknowledgement: **855**
- Electronic Invoicing: **810, 824**
- Advanced Ship Notice: **856**
- Vendor Managed Inventory: **852**

# How does York get vendors and suppliers to provide good EDI data?

Tom Mills, Certification / Implementation Manager  
*York Worldwide Technologies*



# York Worldwide EDI Certification Campaign

- Online portal for your suppliers to onboard with EDI with clear, step-by-step instructions
- Customized to your business needs
- Live, U.S.-based customer support provided by York Worldwide

# EDI Certification benefits for the buyer

- Clear, step-by-step instructions
- Support and resources on-demand
- Customized to your supply chain requirements
- York Worldwide works directly with suppliers through the validation and screening process to complete certification
- Comprehensive Certification Campaign reporting

# EDI Certification benefits for the suppliers

- Cloud-based portal
- On-screen iteration/  
rapid map testing
- On-demand resources
- Validation screening
- Easy-to-read visual steps
- Test document history
- Error notification system
- World-class EDI support
- Discounts for York's other  
EDI services

# EDI Certification overall benefits

- **Save time**

York does the heavy-lifting of onboarding EDI suppliers

- **Save money**

Suppliers pay the fees directly to York – not you

# 16 ways to incorporate EDI into your supply chain

Thomas York, President  
*York Worldwide Technologies*



Require EDI 997 Functional Acknowledgements  
and track them.



2

Transmit and receive data as close to real-time as possible.



3

Have a full EDI strategy:  
EDI *FAST*rack™ / Seldon™ Webforms  
Enthus™ eCommerce / EDI Certification Campaign





Don't use e-mail to transport documents.

5

Consider Item Synchronization  
with every new trading partner.



Implement “reverse” purchase orders.



Replace faxing with low-cost webforms, or EDI-to-FAX



Require EDI 856 Advance Shipping Notices to reflect what exactly has been shipped.

# 9

Do 3-way matching if your ERP system supports it.  
If not, consider having York perform the match  
against your EDI data.

10

Remember your vendor's point of view:  
Be no more specific in your requirements than necessary  
to achieve the goal, and favor public standards over  
proprietary specifications.

11

Value your POS data!

- 1) Vendor managed inventory
- 2) B.I. strategy





Have an EDI champion!

# 13

Use PO Acknowledgement (855), PO Change (EDI 860), PO Change Acknowledgement (865)  
IF they reflect how you purchase.

14

Direct Ship from your eCommerce site via EDI with custom shipping labels; charge credit cards triggered by Advance Shipping Notices (856)

15

Embed APIs into your internal applications for seamless access to the EDI process.

16

## Talk to us!

EDI is a toolbox, not a tool.

[support@yorkworldwide.com](mailto:support@yorkworldwide.com)

(800) 328-8551

# How to enable EDI with York and integrate with Horizon?

Chris Smith  
*Horizon Retail Solutions*

# How to enable EDI with York and integrate to Horizon

- York and Horizon have a partnership dating back 30 years
- York makes it easy to setup trading relationships
- Ongoing investments are being made to improve the EDI integration to Horizon's Host ERP
  - York and Horizon meet bi-weekly to make progress on collaborative EDI initiatives and support

**Want to know more? Reach out!**

[newton.chan@horizonretailsolutions.com](mailto:newton.chan@horizonretailsolutions.com)

The icon consists of two overlapping speech bubbles, one slightly larger and positioned above the other, both rendered in a light blue color. They are set against a circular light blue background.

# Q&A



**Don't forget to let us  
know how we did!**



# Thank you!

