

EDI Document Types and Transaction Types



Modern businesses rely on a range of technologies to communicate, compete, and thrive in a complex global economy.

One of these technologies, electronic data interchange (EDI), can help you spend less, improve efficiency, and even gain a competitive edge over the competition.

Understanding how EDI works and learning the various EDI document types and transaction types helps ensure you can put this critical technology to effective use in building savings, increasing value, and securing performance improvements for your business.

What is EDI?

The term “electronic data interchange” can refer to both EDI documents and EDI transactions. EDI is used to transmit business-relevant information between two parties electronically, e.g. a buyer sending a purchase order to a vendor.

The technology itself was invented in the 1960s, built upon the work of Ed Gilbert with the goal of creating a reliable and swift method for exchanging data electronically between computer systems.

Today, EDI is used by every major industry—including the automotive industry, healthcare, retail, manufacturing, finance, etc.—as companies who want to do business with both world governments and retail titans like WalMart, CostCo, Amazon, and Target are required to follow EDI standards for communicating with their trading partners.

EDI was created to be:

- Standardized for maximum compatibility, accuracy, and convenience, with very stringent formatting requirements.
- Functionally independent of the software used to transmit them; i.e., EDI is not locked to any specific communication or software platform or application.
- Organized around a numbering system that assigns three-digit codes to specific transaction and document types.
- As detailed and specific as possible.

Meeting EDI standards is essential to leveraging the technology effectively. Standardization, strict formatting, and a platform- and application-agnostic approach all ensure precise, complete, and mutually-intelligible data transmission, across time zones, industries, and even languages.

Properly implemented, EDI:

- Reduces operating and administrative costs.
- Integrates seamlessly with best-in-class P2P platforms such as PLANERGY, supporting full integration across your entire software environment.
- Improves the speed, accuracy, and efficiency of data transmission.
- Facilitates effective communication between parties, supporting strong business relationships.
- Simplifies inventory management.
- Builds value through automation, eliminating the need for paper documents, manual workflows, and storage costs while freeing staff to focus on higher-value tasks.
- Improves the accuracy of accounting and helps companies center finance and procurement as value creation centers through analytics, actionable insights, and strategic decision-making.

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Why EDIs Matter

While they're more rigid and specific than more flexible options such as application programming interfaces (APIs), that rigidity is actually responsible for EDI's continued importance.

Standardization supports continuity and scalability while reducing the risk of miscommunication, data loss, or serious supply chain disruptions should one party decide to change software platforms.

EDI Standard Components

All electronic data interchange transactions consist of three key components:

- **Elements**, or the individual lines of data within an EDI. For example, a purchase order will contain data elements such as item numbers, unit price, company name, etc.
- **Segments**, which are groups of elements. Segments describe specific sections of the EDI document. To continue our purchase order example, a segment might be the address/contact information block or the footer containing terms and conditions.
- **Transaction Sets**, or the completed EDI document. To put it another way, EDI elements make up EDI segments, while EDI segments are formatted to make up EDI transaction sets.

Common EDI Document Standards

Trading partners and organizations use EDI to exchange information in a variety of ways.

And while there's no one universal standard covering all industries and

organizations, the **EDI Document Standards** that exist are designed to provide maximum performance and utility for their respective purposes to the greatest number of users.

ANSI ASC X12

Developed in 1979 by the American National Standards Institute (ANSI)'s Accredited Standards Committee (ASC), X12 EDI was designed to support electronic data exchange across industries.

Originally limited to North America, ANSI ASC X12 is now used by more than 300,000 companies worldwide for daily business transactions.

VICS

A subset of the ANSI ASC X12 standard, the Voluntary Inter-Industry Commerce Standard is used primarily by general retail merchandisers in North America.

Managed by Global Standards 1 (GS1), VICS is used by thousands of general retailers, mass merchandisers, department stores, specialty retailers, and the vendors that supply them.

UN/EDIFACT

The United Nations Electronic Data Interchange for Administration, Commerce, and Transport was created by that organization in 1987 as a set of International Organization for Standardization (ISO) standards.

Since then, the United Nations Centre for Trade Facilitation and Electronic Business (UN/CEFACT) has continued to refine and clarify the standard while enhancing its capabilities.

This standard is designed to facilitate the international exchange of information between organizations, and is used extensively across Europe.

An earlier version of EDIFACT, called Tradacoms, was created in 1982 and has been officially deprecated, although it continues to be used in the UK retail market.

EANCOM

Created in 1987 for the retail industry, the EAN Communication standard is the most widely-used subset of the UN/EDIFACT standard. Now managed by the GS1, it has expanded beyond retail and is used by trading partners in healthcare, publishing, construction, and logistics.

HIPAA

When the United States Congress passed the Health Insurance Portability and Accountability Act in 1996, one of its most important mandates was the creation of nationwide standards for the electronic exchange of healthcare data.

Based on the X12 standard, HIPAA seeks to streamline and optimize data exchange in the North American healthcare system through the use of EDI.

SWIFT

A Belgian entity created in 1973, the Society of Worldwide Interbank Financial Telecommunication oversees a vast financial messaging network connecting banks and financial institutions.

The SWIFT standard covers payments, trade services, securities, and trading. It's used for the lion's share of interbank messaging, and is used extensively on the MySWIFT network, a proprietary infrastructure used to exchange EDI documents.

RosettaNet

Connecting high-tech organizations—including consumer electronics manufacturers, telecommunication firms, logistics organizations, and major computer manufacturers—**RosettaNet** helps businesses to manage their supply chains more effectively.

It's based on the eXtensible Markup Language (XML) programming and document language and is designed to promote collaboration and communication across industries using guidelines for electronic messaging, business process management, and software implementation standards.

ODETTE

Representing the European automotive industry, the Organization for Data Exchange by Tele Transmission in Europe is the continental equivalent of the American Automotive Industry Action Group (AIAG) in North America.

Focused on logistics and operational efficiency, ODETTE issues both automotive-specific EDI standards as well as standards for achieving better communication (OFTP, OFTP2) and continuous improvement in business processes (Materials Management Operations Guidelines/Logistics Evaluation (MMOG/LE)).

EDI Communication Protocols

EDI presents users with two different communication options when determining how they will send and receive business documents. The fundamental choice lies between two formats: EDI AS2 and EDI VAN.

EDI AS2

The Applicability Statement 2 protocol uses the HTTP protocol (TCP/IP) on certified servers to transmit data.

It's secure, encrypted, and doesn't create additional data-related fees. AS2 is versatile enough to handle today's file formats. It supports the use of Message Disposition/Delivery notifications (MDNs) to confirm data has been sent and received.

It works with both on-premises hardware and cloud-based software platforms.

EDI VAN

An EDI Value-Added Network creates a closed network between parties to deliver EDI transactions.

VAN users have a mailbox where all documents are sent from and delivered to; this method is intended to reduce document processing and data management costs by using a centralized server that allows users to monitor exchanges in real time, along with versatile options for connecting to the network, support for local data integration, etc.

It does not, however, have the same versatility and power as AS2, and so is

rapidly becoming obsolete.

Common EDI Transaction Codes

Transaction sets within EDI can be broken out by industry, as follows:

Transportation and Logistics

EDI 104: Air Shipment Information

EDI 106: Motor Carrier Rate Proposal

EDI 107: Request for Motor Carrier Rate Proposal

EDI 108: Response to a Motor Carrier Rate Proposal

EDI 109: Vessel Content Details

EDI 110: Air Freight Details and Invoice

EDI 120: Vehicle Shipping Order

EDI 121: Vehicle Service

EDI 125: Multilevel Railcar Load Details

EDI 126: Vehicle Application Advice

EDI 127: Vehicle Baying Order

EDI 128: Dealer Information

EDI 129: Vehicle Carrier Rate Update

EDI 160: Transportation Automatic Equipment Identification

EDI 161: Train Sheet

EDI 163: Transportation Appointment Schedule Information

EDI 204: Motor Carrier Load Tender

EDI 210: Motor Carrier Freight Details and Invoice

EDI 211: Motor Carrier Bill of Lading

EDI 212: Motor Carrier Delivery Trailer Manifest

EDI 213: Motor Carrier Shipment Status Inquiry

EDI 214: Transportation Carrier Ship. Status Message

EDI 215: Motor Carrier Pick-up Manifest

EDI 216: Motor Carrier Shipment Pick-up Notification

EDI 217: Motor Carrier Loading and Route Guide

EDI 219: Logistics Service Request

EDI 220: Logistics Service Response

EDI 222: Cartage Work Assignment

EDI 223: Consolidators Freight Bill and Invoice

EDI 224: Motor Carrier Summary Freight Bill Manifest

EDI 225: Response to a Cartage Work Assignment

EDI 227: Trailer Usage Report

EDI 228: Equipment Inspection Report

EDI 240: Motor Carrier Package Status

EDI 250: Purchase Order Shipment Management Document

EDI 300: Reservation (Booking Request) (Ocean)

EDI 301: Confirmation (Ocean)

EDI 303: Booking Cancellation (Ocean)

EDI 304: Shipping Instructions

EDI 309: Customs Manifest

EDI 310: Freight Receipt and Invoice (Ocean)

EDI 311: Canada Customs Information

EDI 312: Arrival Notice (Ocean)

EDI 313: Shipment Status Inquiry (Ocean)

EDI 315: Status Details (Ocean)

EDI 317: Delivery/Pickup Order

EDI 319: Terminal Information

EDI 322: Terminal Operations and Intermodal Ramp Activity

EDI 323: Vessel Schedule and Itinerary (Ocean)

EDI 324: Vessel Stow Plan (Ocean)

EDI 325: Consolidation of Goods in Container

EDI 326: Consignment Summary List

EDI 350: Customs Status Information

EDI 352: U.S. Customs Carrier General Order Status

EDI 353: Customs Events Advisory Details

EDI 354: U.S. Customs Auto. Manifest Archive Status

EDI 355: U.S. Customs Acceptance/Rejection

EDI 356: U.S. Customs Permit to Transfer Request

EDI 357: U.S. Customs In-Bond Information

EDI 358: Customs Consist Information

EDI 359: Customs Customer Profile Management

EDI 361: Carrier Interchange Agreement (Ocean)

EDI 404: Rail Carrier Shipment Information

EDI 410: Rail Carrier Freight Details and Invoice

EDI 412: Trailer or Container Repair Billing

EDI 414: Rail Car Hire Settlements

EDI 417: Rail Carrier Waybill Interchange

EDI 418: Rail Advance Interchange Consist

EDI 419: Advance Car Disposition

EDI 420: Car Handling Information

EDI 421: Estimated Time of Arrival & Car Scheduling

EDI 422: Equipment Order

EDI 423: Rail Industrial Switch List

EDI 424: Rail Carrier Services Settlement

EDI 425: Rail Waybill Request

EDI 426: Rail Revenue Waybill

EDI 429: Railroad Retirement Activity

EDI 431: Railroad Station Master File

EDI 432: Rail Deprescription

EDI 433: Railroad Reciprocal Switch File

EDI 434: Railroad Mark Register Update Activity

EDI 435: Standard Transportation Commodity Code Master

EDI 436: Locomotive Information

EDI 437: Railroad Junctions & Interchanges Activity

EDI 440: Shipment Weights

EDI 451: Railroad Event Report

EDI 452: Railroad Problem Log Inquiry or Advice

EDI 453: Railroad Service Commitment Advice

EDI 455: Railroad Parameter Trace Registration

EDI 456: Railroad Equipment Inquiry or Advice

EDI 460: Railroad Price Distribution Request or Response

EDI 463: Rail Rate Reply

EDI 466: Rate Request

EDI 468: Rate Docket Journal Log

EDI 470: Railroad Clearance

EDI 475: Rail Route File Maintenance

EDI 485: Ratemaking Action

EDI 486: Rate Docket Expiration

EDI 490: Rate Group Definition

EDI 492: Miscellaneous Rates

EDI 494: Rail Scale Rates

EDI 601: U.S. Customs Export Shipment Information

EDI 603: Transportation Equipment Registration

EDI 715: Intermodal Group Loading Plan

EDI 854: Shipment Delivery Discrepancy Info.

EDI 858: Shipment Information

EDI 859: Freight Invoice

EDI 920: Loss or Damage Claim: Gen. Commodities

EDI 924: Loss or Damage Claim: Motor Vehicle

EDI 925: Claim Tracer

EDI 926: Claim Status Report and Tracer Reply

EDI 928: Automotive Inspection Detail

EDI 980: Functional Group Totals

EDI 990: Response to a Load Tender

EDI 998: Set Cancellation

Retail and Manufacturing

EDI 101: Name and Address Lists

EDI 140: Product Registration

EDI 141: Product Service Claim Response

EDI 142: Product Service Claim

EDI 143: Product Service Notification

EDI 159: Motion Picture Booking Confirmation

EDI 170: Revenue Receipts Statement

EDI 180: Return Merchandise Authorization & Notification

EDI 244: Product Source Information

EDI 290: Cooperative Advertising Agreements

EDI 503: Pricing History

EDI 504: Clauses and Provisions

EDI 620: Excavation Communication

EDI 625: Well Information

EDI 753: Request For Routing Instructions

EDI 754: Routing Instructions

EDI 816: Organizational Relationships

EDI 818: Commission Sales Report

EDI 830: Planning Schedule w/ Release Capability

EDI 832: Price/Sales Catalog

EDI 840: Request for Quotation

EDI 841: Specifications/Technical Information

EDI 842: Nonconformance Report

EDI 843: Response to Request for Quotation

EDI 845: Price Authorization Acknowledgment/Status

EDI 846: Inventory Inquiry/Advice

EDI 847: Material Claim

EDI 848: Material Safety Data Sheet

EDI 850: Purchase Order

EDI 851: Asset Schedule

EDI 852: Product Activity Data

EDI 853: Routing and Carrier Instruction

EDI 855: Purchase Order Acknowledgment

EDI 856: Ship Notice/Manifest

EDI 857: Shipment and Billing Notice

EDI 860: Purchase Order Change Request: Buyer Initiated

EDI 861: Receiving Advice/Acceptance Certificate

EDI 862: Shipping Schedule

EDI 863: Report of Test Results

EDI 865: Purchase Order Change Acknowledgment/Request: Seller Initiated

EDI 866: Production Sequence

EDI 867: Product Transfer and Resale Report

EDI 869: Order Status Inquiry

EDI 870: Order Status Report

EDI 873: Commodity Movement Services

EDI 874: Commodity Movement Services Response

EDI 875: Grocery Products Purchase Order

EDI 876: Grocery Products Purchase Order Change

EDI 877: Manufacturer Coupon Family Code Structure

EDI 878: Product Authorization/De-authorization

EDI 879: Price Information

EDI 881: Manufacturer Coupon Redemption Detail

EDI 882: Direct Store Delivery Summary Information

EDI 883: Market Development Fund Allocation

EDI 884: Market Development Fund Settlement

EDI 885: Retail Account Characteristics

EDI 886: Customer Call Reporting

EDI 887: Coupon Notification

EDI 888: Item Maintenance

EDI 889: Promotion Announcement

EDI 890: Contract & Rebate Management

EDI 891: Deduction Research Report

EDI 893: Item Information Request

EDI 894: Delivery/Return Base Record

EDI 895: Delivery/Return Acknowledgment or Adjustment

EDI 896: Product Dimension Maintenance

EDI 940: Warehouse Shipping Order

EDI 943: Warehouse Stock Transfer Shipment Advice

EDI 944: Warehouse Stock Transfer Receipt Advice

EDI 945: Warehouse Shipping Advice

EDI 947: Warehouse Inventory Adjustment Advice

Finance

EDI 130: Student Educational Record (Transcript)

EDI 131: Student Educational Record (Transcript) Acknowledgment

EDI 132: Human Resource Information

EDI 133: Educational Institution Record

EDI 135: Student Aid Origination Record

EDI 138: Education Testing and Prospect Request and Report

EDI 139: Student Loan Guarantee Result

EDI 144: Student Loan Transfer and Status Verification

EDI 146: Request for Student Educational Record (Transcript)

EDI 147: Response to Request for Student Educational Record (Transcript)

EDI 155: Business Credit Report

EDI 188: Educational Course Inventory

EDI 189: Application for Admission to Educational Institutions

EDI 190: Student Enrollment Verification

EDI 191: Student Loan Pre-Claims and Claims

EDI 197: Real Estate Title Evidence

EDI 198: Loan Verification Information

EDI 199: Real Estate Settlement Information

EDI 200: Mortgage Credit Report

EDI 201: Residential Loan Application

EDI 202: Secondary Mortgage Market Loan Delivery

EDI 203: Secondary Mortgage Market Investor Report

EDI 205: Mortgage Note

EDI 206: Real Estate Inspection

EDI 245: Real Estate Tax Service Response

EDI 248: Account Assignment/Inquiry & Service/Status

EDI 259: Residential Mortgage Insurance Explanation of Benefits

EDI 260: Application for Mortgage Insurance Benefits

EDI 261: Real Estate Information Request

EDI 262: Real Estate Information Report

EDI 263: Residential Mortgage Insurance Application Response

EDI 264: Mortgage Loan Default Status

EDI 265: Real Estate Title Insurance Services Order

EDI 266: Mortgage or Property Record Change Notification

EDI 810: Invoice

EDI 811: Consolidated Service Invoice/Statement

EDI 812: Credit/Debit Adjustment

EDI 814: General Request, Response, or Confirmation

EDI 819: Joint Interest Billing and Operating Expense Statement

EDI 820: Payment Order/Remittance Advice

EDI 821: Financial Information Reporting

EDI 822: Account Analysis

EDI 823: Lockbox

EDI 824: Application Advice

EDI 827: Financial Return Notice

EDI 828: Debit Authorization

EDI 829: Payment Cancellation Request

EDI 831: Application Control Totals

EDI 833: Mortgage Credit Report Order

EDI 844: Product Transfer Account Adjustment

EDI 849: Response to Product Transfer Account Adjustment

EDI 872: Residential Mortgage Insurance Application

EDI 880: Grocery Products Invoice

Communications and Controls

EDI 102: Associated Data

EDI 242: Data Status Tracking

EDI 815: Cryptographic Service Message

EDI 864: Text Message

EDI 868: Electronic Form Structure

EDI 993: Secured Receipt or Acknowledgment

EDI 997: Functional Acknowledgment

EDI 999: Implementation Acknowledgment

Government

EDI 103: Abandoned Property Filings

EDI 105: Business Entity Filings

EDI 113: Election Campaign & Lobbyist Reporting

EDI 149: Notice of Tax Adjustment or Assessment

EDI 150: Tax Rate Notification

EDI 151: Electronic Filing of Tax Return Data Acknowledgment

EDI 152: Statistical Government Information

EDI 153: Unemployment Insurance Tax Claim or Charge Information

EDI 154: Secured Interest Filing

EDI 157: Notice of Power of Attorney

EDI 158: Tax Jurisdiction Sourcing

EDI 175: Court and Law Enforcement Notice

EDI 176: Court Submission

EDI 179: Environmental Compliance Reporting

EDI 185: Royalty Regulatory Report

EDI 194: Grant or Assistance Application

EDI 195: Federal Communications Commission (FCC) License Application

EDI 196: Contractor Cost Data Reporting

EDI 249: Animal Toxicological Data

EDI 251: Pricing Support

EDI 280: Voter Registration Information

EDI 283: Tax or Fee Exemption Certification

EDI 284: Commercial Vehicle Safety Reports

EDI 285: Commercial Vehicle Safety and Credentials Information Exchange

EDI 286: Commercial Vehicle Credentials

EDI 288: Wage Determination

EDI 500: Medical Event Reporting

EDI 501: Vendor Performance Review

EDI 511: Requisition

EDI 517: Material Obligation Validation

EDI 521: Income or Asset Offset

EDI 527: Material Due-In and Receipt

EDI 536: Logistics Reassignment

EDI 540: Notice of Employment Status

EDI 561: Contract Abstract

EDI 567: Contract Completion Status

EDI 568: Contract Payment Management Report

EDI 650: Maintenance Service Order

EDI 805: Contract Pricing Proposal

EDI 806: Project Schedule Reporting

EDI 813: Electronic Filing of Tax Return Data

EDI 826: Tax Information Exchange

EDI 836: Procurement Notices

EDI 838: Trading Partner Profile

EDI 839: Project Cost Reporting

EDI 996: File Transfer

Healthcare and Insurance

EDI 100: Insurance Plan Description

EDI 111: Individual Insurance Policy & Client Info.

EDI 112: Property Damage Report

EDI 124: Vehicle Damage

EDI 148: Report of Injury, Illness, or Incident

EDI 186: Insurance Underwriting Requirements Reporting

EDI 187: Premium Audit Request and Return

EDI 252: Insurance Producer Administration

EDI 255: Underwriting Information Services

EDI 256: Periodic Compensation

EDI 267: Individual Life Annuity & Disability Application

EDI 268: Annuity Activity

EDI 269: Health Care Benefit Coordination Verification

EDI 270: Eligibility, Coverage or Benefit Inquiry

EDI 271: Eligibility, Coverage or Benefit Information

EDI 272: Property and Casualty Loss Notification

EDI 273: Insurance/Annuity Application Status

EDI 274: Health Care Provider Information

EDI 275: Patient Information

EDI 276: Health Care Claim Status Request

EDI 277: Health Care Information Status Notification

EDI 278: Health Care Services Review Information

EDI 362: Cargo Insurance Advice of Shipment

EDI 834: Benefits Enrollment and Maintenance

EDI 835: Health Care Claim Payment/Advice

EDI 837: Health Care Claim

EDI Documents in Procurement and Finance

Not every business will utilize every EDI code, of course. For most companies, however, the procurement and finance functions will build value and create savings through the use of certain EDI codes to streamline and standardize.

EDI 204: Motor Carrier Load Tender

This EDI is used by shippers to submit an offer for shipment to a transportation provider. It can be used to create a new shipment, modify an existing shipment, or cancel the shipment altogether. A successful EDI 204 creates a 997 Functional Acknowledgement for the shipper.

EDI 810: Invoice

This EDI is used to create an electronic invoice. It is sent from a vendor to a buyer to request payment in response to a successful EDI 850 Purchase Order (once the relevant goods or services have been provided). When the buyer receives the EDI 810, they will generate an EDI 997 Functional Acknowledgement to notify the vendor their invoice has been successfully received.

EDI 850: Purchase Order

This EDI creates an electronic version of a purchase order (PO), used to request goods and services from a supplier. EDI 850s must include:

- Detailed listing of the goods and services requested.
- Quantities ordered.
- Full pricing information for all goods and services.
- Payment terms.
- Shipping instructions, including carrier details.

EDI compliance requires the supplier generate other specific EDI documents in response to a successful purchase order, including:

- **EDI 997 Functional Acknowledgement** (Confirms receipt of the PO).
- **EDI 855 Order Acknowledgment** (Confirms ability to fulfill PO).

- **EDI 856 Advanced Shipping Notice** (A detailed description of each shipment).
- **EDI 810 Invoice** (Invoice in response to PO).
- **EDI 860 Order Change Request** (Request for updated information on PO should corrections or other changes occur).

EDI 852: Product Activity Data

This EDI gives trading partners information related to a product's SKU activity data.

This information includes sales rates, current inventory levels, etc. EDI 852 can be used to provide vendors and other trading partners with regular inventory updates, or to notify them of an unusual change in inventory.

EDI 854: Shipment Delivery Discrepancy Information

This EDI is used to let carriers notify shippers that a discrepancy exists between tendered freight and the actual freight delivered. Users can monitor overages, shortages, and potential damages and take action in a timely fashion.

EDI 855: Purchase Order Acknowledgment

This EDI is sent from a seller to a buyer to confirm receipt and processing of a purchase order.

Many organizations require specific timeframes for EDI 855s to be issued in order to maintain their production and sales timelines.

EDI 855 is related to, but distinct from, the EDI 997 Functional Acknowledgement, which is sent from the buyer to the *seller* upon receipt of an EDI 855.

EDI 856: Ship Notice/Manifest

Sometimes referred to as the EDI Advanced Shipping Notice (EDI ASN), this EDI is issued in response to EDI 850 (Purchase Order), EDI 830 (Planning Schedule with Release), and EDI 862 (Shipping Schedule). An EDI 856 provides detailed

information on the contents of a shipment.

EDI 860: Purchase Order Change Request

When a buyer needs to update a purchase order that's already been sent to a vendor, they issue this EDI. An EDI 860 is commonly used by buyers to request specific changes to a purchase order, but it can also be used to confirm the buyer's acceptance of changes to a purchase order requested by the seller.

Make EDI Part of Your Long-Term Plan for Growth and Performance.

By leveraging existing standards to provide reliable and secure transactions, EDI gives many businesses a dependable, efficient, and cost-effective digital resource for conducting business electronically.

Ensuring you've invested in digital tools that support EDI as part of a comprehensive digital transformation and system integration plan will give your company the technology it needs today with the adaptability required to meet the challenges that lie over the horizon.

What's your goal today?

1. Use PLANERGY to manage purchasing and accounts payable

We've helped save billions of dollars for our clients through better spend management, process automation in purchasing and finance, and reducing financial risks. To discover how we can help grow your business:

- Read our case studies, client success stories, and testimonials.
- Visit our "Solutions" page to see the areas of your business we can help improve to see if we're a good fit for each other.
- Learn about us, and our long history of helping companies just like yours.

Book a Live Demo

2. Download our guide “Preparing Your AP Department For The Future”

Download a free copy of our guide to future proofing your accounts payable department. You’ll also be subscribed to our email newsletter and notified about new articles or if have something interesting to share.

download a free copy of our guide

3. Learn best practices for purchasing, finance, and more

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