EDI Integration

Ordering · https://mountainstream.co/docs/edi-integration/

Company › Settings.

Integrate EDI via SFTP

Electronic Data Interchange: automated exchange of structured data, by agreed message standards, between Streamline and your trading partners. Includes Purchase Orders, Invoices and Credits.

[A website menu with COMPANY highlighted. A dropdown shows options: Company Users, Emails, Audit Trail, Settings, and EDI Integration. Purple pointers labeled 1 and 2 indicate COMPANY and Settings, respectively.]

[Screenshot of a company FTP settings page with fields for hostname, username, password, and port. FTP is enabled, EDI Integration is supported, Automatically process orders is set to yes, with options to save changes or download a template.]

Configuring FTP for Scheduled Data Exchange

Server Credentials and Connection

Enter the connection details for your partner's server to establish the link.

- **Host name** - The server address (e.g., ftp.partnercompany.com).
- **Using SFTP** - Check this box if the connection requires the more secure SFTP protocol.
- **Port** - The port number for the connection (typically 21 for FTP or 22 for SFTP).

Enable “Automatically process orders”:

- **Importing New Orders**Streamline will connect to your partner's server to look for new orders to import.
  - **File Location:** Your partner must place all order files in the [root]/orders directory on their server.
  - **File Format:** a sample of the required file format for the orders.
- **Validations**

Data Export Functions

- **Exporting Published Invoices & Credits**
  - Invoices and credits are uploaded to the /invoices directory on the partner's FTP server.
- **Exporting the Item Catalogue**Ensures your trading partner has an up-to-date list of your products.
  - Streamline exports the item catalogue based on two types of triggers:
    - **Scheduled Export:** Runs **daily at 12:00 AM**.
    - **Update-Triggered Export:** Whenever a change is made to an item in your Master Catalogue.

Get Started