



## EDI Setup Document

Electronic Data Interchange is the automated exchange of documents in standard electronic form, between organizations, directly from a computer application in one organization to an application in another. As more and more companies are looking to gain access to real-time information, both Internet and EDI have become important tools to send and receive information. At Clarke, we are not different and we encourage the use of either technology based on individual customer needs. Clarke can send or receive many EDI transactions including most commonly used:

- 204 Motor Carrier Shipment Information
- 210 Motor Carrier Freight Details and Invoice
- 214 Transportation Carrier Shipment Status Message
- 990 Response to Load Tenders
- 997 Acknowledgements
- other

If you prefer to use EDI to receive information to Clarke, EDI group will be happy to assist. In order to start the EDI implementations process, we would like your I.T. department to complete and return EDI setup document along with your EDI specifications and sample documents. This document will provide Clarke personnel with the necessary information to coordinate and start planning for the implementation of your request. You may forward information to [edi@clarkeitsolutions.com](mailto:edi@clarkeitsolutions.com).

## Trading Partner Compliancy

Each EDI partner must be able to meet Clarke's compliancy standards. As a starting point, EDI partners must be able to provide information such as EDI ID, qualifier, VAN, EDI versions supported, document types supported etc. Along with it, EDI partners must be able to provide EDI transaction sets that needs to be set up along with detailed mapping requirements. As part of EDI compliancy, it is expected:

- Partner must be an active customer or supplier with adequate transaction volume.
- Partner must provide EDI contact detail whom can be reached throughout EDI set up process.
- Any special requirements must be made clear prior to starting EDI implementation.
- During testing phase customer / partner must be able to assign sufficient I.T. resources to satisfy testing requirements.
- Only after complete testing and written acceptance, EDI transactions can go live.
- Customer / Partner must be able to provide timely feedback (within 24 hours) in regards to EDI transaction. In the absence of automatic EDI acknowledgment, Clarke will assume EDI transaction is successfully completed unless written communication is received to state otherwise.
- Any changes to active EDI communication must go through standards change management procedure of Clarke and subject to availability of I.T. resources.
- For all outgoing EDI 210 (Freight Invoices) transactions, Clarke A/R department assume all EDI transactions are successfully completed unless they receive a



written notice stating otherwise. It is the responsibility of customer (partner) to align their EDI mapping to meet back-end system requirements. Clarke's responsibility is limited to meeting mapping requirement only.

#### Other Online Tools

It is also very important to acknowledge that EDI process may not be suitable to all customers. In order to satisfy customers who do not have EDI capability, Clarke offers online access to all transactions through Clarkelink.com. In addition, Clarke does offer E-invoice options in multiple standard formats to meet everyone's needs. Along with the EDI, Clarke also offers electronic POD via Email and/or fax.

#### EDI Trading Partner Setup

TRADING PARTNER DETAILS	
Trading Partner Name	
SCAC Code:	
DUNS Number(s):	
Address Line 1:	
Address Line 2:	
City, Province	
Postal Code / Zip Code	
<b>Signature</b>	
TRADING PARTNER CONTACTS	
<b>Business Contact Name</b>	
Business Contact's Title	
Business Contact's Phone	
<b>Business Contact's Email</b>	
<b>Technical Contact Name</b>	
Technical Contact's Title	
Technical Contact's Phone	
<b>Technical Contact's Email</b>	
TRADING PARTNER IDs	
ISA Qualifier (TEST)	
ISA Identifier (TEST)	
ISA Qualifier (PROD)	
ISA Identifier (PROD)	
Communications Software	
Communication Method	
Value Added Network (VAN)	
FTP SERVER INFORMATION	
URL / hostname	



IP Address	
Account Username	
Account Password	
Inbound Directory (TEST)	
Outbound Directory (TEST)	
Inbound Directory (PROD)	
Outbound Directory (PROD)	
File Format (TEST)	
File Format (PROD)	

### EDI Document Request

Indicate which EDI documents your company would like to exchange and indicate any additional EDI document requirements.

### EDI Documents

EDI Doc	Document Description	Transaction Set ID	Standard	Version	Yes / No?
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Please attach additional pertinent information.

*Upon completion, return this completed and signed document, along with partner specifications and sample documents, to [edi@clarketransport.com](mailto:edi@clarketransport.com). Once reviewed, we will contact you and coordinate the next step in the EDI process.*

Sincerely,

**Abbas Murtuza**  
EDI Application Manager  
905-291-3000 x 3047  
[edi@clarketransport.com](mailto:edi@clarketransport.com)