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How to Set-up Cleo Clarify to Recognize Inbound 997s in Dashboard

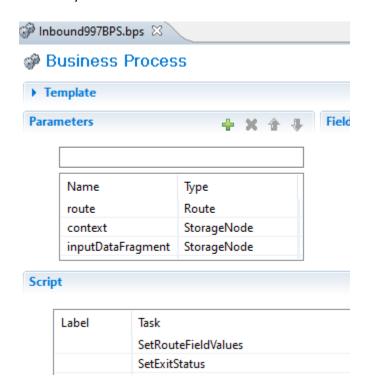Clarify Work...   Admin Cons...   SVN Reposit...   Team Synchr...

By default, the current Cleo Dashboard (3.3.4) does not associate a trading partner with inbound EDI 997s (below). This is due to Clarify being unable to match a Trading Partner object to the inbound 997 in Clarify.

ICN ⬍	GCN ⬍	TSCN ⬍	Trading Partner ⬍	Direction ⬍	
296982724	296965340	296966586		Receive	
296982706	296965322	296966568		Receive	
296982694	296965310	296966556		Receive	
296982688	296965304	296966550		Receive	

1 SETUP – BUSINESS PROCESS

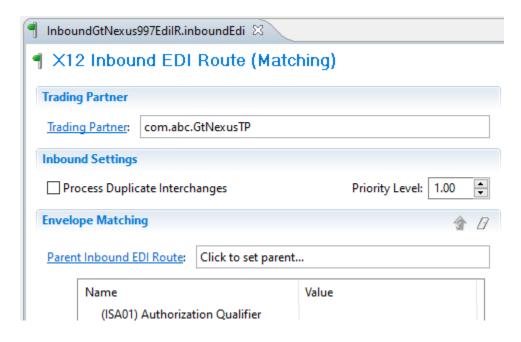In Cleo Clarify create an Inbound 997 EDI Route Business Process.

The newly created Business Process will contain the two default tasks (below).

Inbound997BPS.bps

Business Process

▸ Template

Parameters   ➕ ✖ ⬆ ⬇   Field

Name	Type
route	Route
context	StorageNode
inputDataFragment	StorageNode

Script

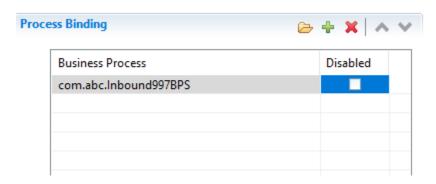| Label	Task
	SetRouteFieldValues
	SetExitStatus

2 SETUP – INBOUND ROUTE

An Inbound Route will need to be created for each 997 document you want to see a Trading Partner attached to.

The example trading partner will be GtNexus.

Once created, a 997 coming in for GtNexus in the Cleo Dashboard.

ICN ⬍	GCN ⬍	TSCN ⬍	Trading Partner ⬍	Direction ⬍	Status ⬍	Doc
000267544	267544	0001	GtNexus	Receive	✅ Completed	997
000267545	267545	0001	GtNexus	Receive	✅ Completed	997