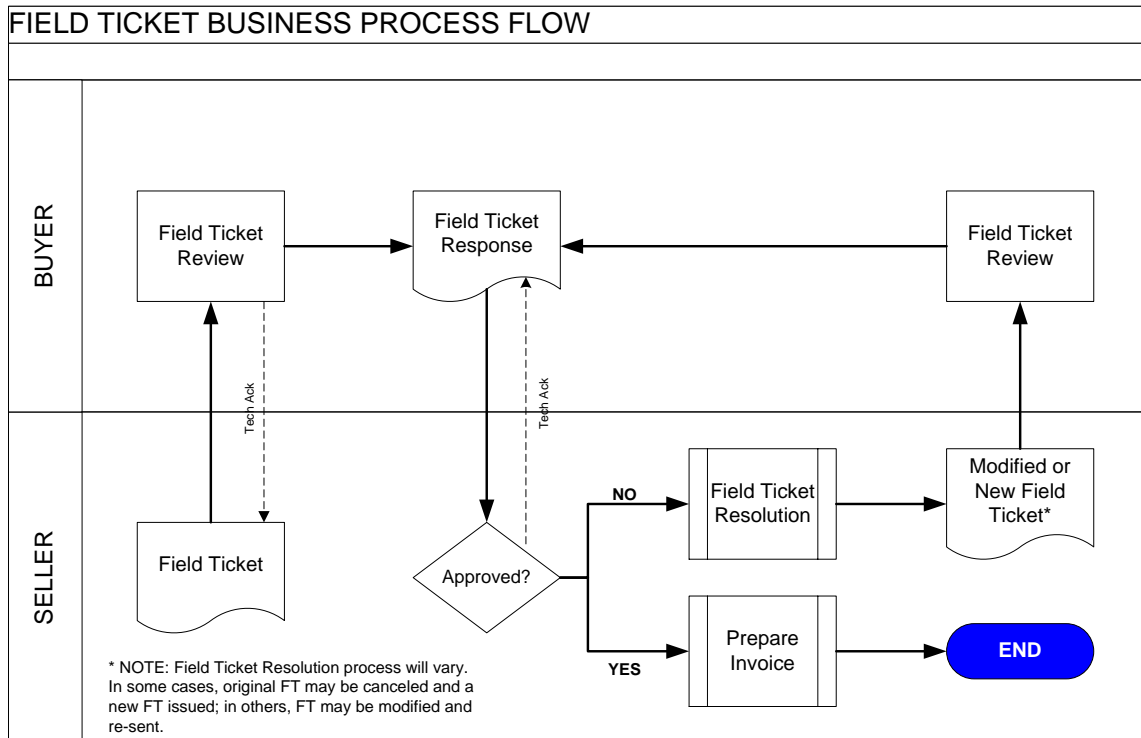


Field Ticket Process Business Process Guideline (BPG) Field Ticket Project Team Proposal (PTP) Guidelines (Working Documentation)

Below is the Business Process Diagram for the Field Ticket transaction. This is not the only method in which the process may occur; however, it represents a primary process. A third party acting as an agent for the buyer or seller may be involved but the primary actors are considered to be the buyer and seller.



Process Model - Seller completes work at a customer site. A field ticket is generated for Buyer review and approval.

Buyer review may occur on-site and in collaboration with the Seller, at which point the Seller may modify the Field Ticket prior to approval. Alternatively, Buyer review and approval may occur off-site. The seller creates an XML field ticket and sends it to the Buyer.

The Buyer processes the XML field ticket and sends a Field Ticket Response, accepting or disputing the field ticket information in whole or in part. Disputes are handled in accordance with mutually agreed dispute resolution process. If necessary, once disputes are resolved, a corrected (or new) field ticket is generated and sent to the Buyer.

Use Case: Correct Field Ticket

Business process name	Correct Field Ticket
Identifier	PIDX XML Field Ticket and Field Ticket Response
Actors	Buyer, Seller Intermediary may be involved as an agent for the buyer and/or seller
Definitions	<p>Trading Partner: The Buyer or Seller</p> <p>Intermediary: Organization between Trading Partners that may handle routing and/or act on behalf of Trading Partner at different stages in the business process workflow</p> <p>Message: Payload along with TRP protocol envelope</p> <p>Payload: Field Ticket/Field Ticket Response data</p> <p>Routing Hub: Intermediary that routes messages but does not participate in business process workflow.</p> <p>Network: Intermediary that acts on behalf of buyer or seller and is a participant in the business process workflow.</p> <p>Field Ticket: The Field Ticket is an estimated statement of products and services delivered, work performed, quantity and financials. It provides legal documentation of details associated with delivered products and services and captures Buyer agreement of delivery. It is the basis for invoice creation, invoice reconciliation and may serve other functions internally.</p> <p>Field Ticket Response: The Field Ticket Response message refers to Field Ticket data payload and is transmitted by buyer to seller to indicate that the field ticket has been approved or is in dispute.</p>
Description	Seller issues field ticket for products/services delivered. Buyer approves field ticket per procedures set forth during contract negotiations.
Pre-condition	The Seller has provided goods or services according to the conditions set in the contract and/or order.
Post-conditions	Approved field ticket is provided electronically to both seller and buyer.
Scenario	<p>The supplier provides goods or services to the customer. The Seller will generate the field ticket for the goods or services delivered.</p> <p>The Buyer reviews field ticket for accuracy.</p> <p>Upon conclusion of review process, Buyer issues Field Ticket Response to accept/approve field ticket.</p>
Recommended Best Practices	<ul style="list-style-type: none"> Buyer should issue one Field Ticket Response to accept/approve Field Ticket at the successful conclusion of review process. Field Ticket and Field Ticket Response should be transmitted via the same communication channel.

Use Case: Disputed Field Ticket

Business process name	Disputed Field Ticket
Identifier	PIDX XML Field Ticket and Field Ticket Response
Actors	Buyer, Seller Intermediary may be involved as an agent for the buyer and/or seller
Definitions	<p>Trading Partner: The Buyer or Seller</p> <p>Intermediary: Organization between Trading Partners that may handle routing and/or act on behalf of Trading Partner at different stages in the business process workflow</p> <p>Message: Payload along with TRP protocol envelope</p> <p>Payload: Field Ticket/Field Ticket Response data</p> <p>Routing Hub: Intermediary that routes messages but does not participate in business process workflow.</p> <p>Network: Intermediary that acts on behalf of buyer or seller and is a participant in the business process workflow.</p> <p>Field Ticket: The Field Ticket is an estimated statement of products and services delivered, work performed, quantity and financials. It provides legal documentation of details associated with delivered products and services and captures Buyer agreement of delivery. It is the basis for invoice creation, invoice reconciliation and may serve other functions internally.</p> <p>Field Ticket Response: The Field Ticket Response message refers to Field Ticket data payload and is transmitted by buyer to seller to indicate that the field ticket has been approved or is in dispute.</p>
Description	Seller issues field ticket for products/services delivered electronically for Buyer review and approval. Buyer finds error(s) during review process and issues Field Ticket Response to reject Invoice. Dispute resolution process begins.
Pre-condition	The Seller has provided goods or services according to the conditions set in the contract and/or order. The Buyer has received the goods or services. Mutually agreed Field Ticket dispute resolution process is in place.
Post-conditions	Trading partners will address issues per agreed dispute resolution process and continue field ticket to payment process as appropriate.
Scenario	<p>The Seller provides goods or services to the Buyer. The Seller will generate the field ticket for the goods or services delivered.</p> <p>The Buyer reviews the field ticket for accuracy.</p> <p>Buyer review process results in a disputed field ticket. Buyer issues Field Ticket Response to reject/dispute entire Field Ticket. Rejection/Dispute may be system- or human-generated, depending on where the error is identified during review process.</p> <p>Reasons for dispute may be listed at the line item level or pertain to the entire invoice.</p>
Remarks	<p>Responses to a disputed Field Ticket may include:</p> <ul style="list-style-type: none"> • Original field ticket is accepted by Buyer following discussion with Seller • Seller may cancel original field ticket • Seller may re-send corrected field ticket <p>Standard rejection reasons for field ticket rejection include:</p>

	<ul style="list-style-type: none"> • Missing or invalid data + x-path reference • Duplicate Field Ticket Number • Item not received • Product or Service Price Dispute • Item doesn't match contract • Quantity Variance • Purchase Order closed or invalid dates • Other <p>A "free form" text area is available and should always be used if "Other" is selected. This may occur if a Buyer has non-standard reasons for disputing a field ticket.</p>
<p>Recommended Best Practices</p>	<ul style="list-style-type: none"> • Reason/Code "Other" and free form text should only be used when an appropriate standard reason is unavailable. • To the extent possible, all known reasons should be identified for the point of failure. • Field Ticket and Field Ticket Response should be transmitted via the same communication channel. • Each Field Ticket transaction should receive a corresponding Field Ticket Response transaction.