PIDX Document Response Business Process Guideline (BPG)

One of the goals of the PIDX standards is to make the Order-to-Cash/Purchase-to-Pay transaction cycle more efficient.

To that end, PIDX has developed response documents which indicate a trading partner’s acceptance or rejection of a particular transaction (Purchase Order, Field Ticket, Proforma Invoice or Invoice).

Effective communication of the reason a particular transaction is being rejected improves the efficiency of the dispute resolution process in the short term, and provides feedback to the trading partner for long term business process improvement.

The following principals should be followed:

- Responses should be actionable by the original document sender
- Receiver of the document should generate the response (XML/eMail) using only approved PIDX response codes and definitions
- Receiver should interrogate the entire document and include all response codes by line item in a single response.

In addition to enhancing the list of approved codes, some members suggested that it would be useful if standard rejection reason codes were used, even outside the PIDX response documents. An example would be email notifications of document rejection. PIDX members spend an inordinate amount of time and effort following up with Account Payables and Accounts Receivables personnel to understand dispute responses. It often results in follow up discussions and interactions with top Management that lead to an inefficient use of members’ time. The response documents should be used to communicate business decisions. Protocol acknowledgments such as RINIF Receipt Ack. are not to be used for this purpose.

This document defines a new unified Business Process Guideline for document response that supersedes previous guidelines for (Purchase Order, Field Ticket, Proforma Invoice or Invoice) Response.

For trading partners that have not yet implemented the XML response documents, this document defines a new standard format and guidelines for email notifications for (Purchase Order, Field Ticket, Proforma Invoice or Invoice) Responses.
Business Process Flow:

PIDX Document Response Process Flow

<table>
<thead>
<tr>
<th>Phase</th>
<th>Receiver</th>
<th>Intermediary</th>
<th>Sender</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Document</td>
<td>Accept</td>
<td>Document Response</td>
<td>Generate Document</td>
</tr>
<tr>
<td>Status = Accept</td>
<td>Accept</td>
<td>eMail Notification</td>
<td>Process Rejection Reason</td>
</tr>
<tr>
<td>Accept OR Reject?</td>
<td>Document</td>
<td>eMail Notification</td>
<td>End</td>
</tr>
<tr>
<td>Create Document</td>
<td>Accept</td>
<td>Document Response</td>
<td></td>
</tr>
<tr>
<td>Status = Accept</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PIDX XML Response Code Definitions:

XML

```xml
<simpleType name="ResponseReasonType">
  <restriction base="string">
    <enumeration value="R001 - Pricing Issue"/>
    <enumeration value="R002 - Quantity Issue"/>
    <enumeration value="R003 - Incorrect Property/Well/Cost Center"/>
    <enumeration value="R004 - Incorrect AFE"/>
    <enumeration value="R005 - Discount Missing"/>
    <enumeration value="R006 - Price Sheet / Contract Missing"/>
    <enumeration value="R007 - Purchase Order Missing"/>
    <enumeration value="R008 - Routing Information / Approver Missing or incorrect"/>
    <enumeration value="R009 - Service Period Missing/Incorrect"/>
    <enumeration value="R010 - No Signed Field Ticket Attached"/>
    <enumeration value="R011 - Attached Images Unreadable / Incorrect"/>
    <enumeration value="R012 - Goods/Services Not Received"/>
    <enumeration value="R013 - Damaged Goods"/>
    <enumeration value="R014 - Document Does Not Belong to Receiver"/>
    <enumeration value="R015 - Rejected at Sender’s Request"/>
    <enumeration value="R016 - Tax Issue"/>
    <enumeration value="R017 - Duplicate Document Number"/>
    <enumeration value="R018 - Required Fields Missing"/>
    <enumeration value="R019 - PO Line Item Has Delivery Complete Indicator Set"/>
    <enumeration value="R020 - Service Master Number Does Not Match"/>
    <enumeration value="R021 - Document Date Invalid"/>
    <enumeration value="R022 - Base Unit of Measure Missing/Invalid"/>
    <enumeration value="R023 - Short Text Missing"/>
    <enumeration value="R024 - Reference Document Number Missing/Invalid"/>
    <enumeration value="R025 - Field Approver Missing/Invalid"/>
    <enumeration value="R026 - Accept"/>
    <enumeration value="R027 - Accept With Changes"/>
    <enumeration value="R028 - Already Acknowledged"/>
  </restriction>
</simpleType>
```
Email

From: Receiver
Sent: Thursday, February 12, 2015 12:50 PM
To: Sender
Subject: Original Document (Document Type); Original Document number (Document Number); Response Type (Accept or Reject)

Header: (Response code and Response Description)
Job Location Code; Supplier ID;
Line Item # (Line #: Response Code Response Description)
### Process Model -

#### Use Case: Sender Provides document Information

<table>
<thead>
<tr>
<th>Business process name</th>
<th>Sender provides PIDX Document information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifier</td>
<td>PIDX XML Document using (Order Create, Field Ticket, Proforma, Invoice)</td>
</tr>
<tr>
<td>Actors</td>
<td>Buyer, Seller or Intermediary may be involved</td>
</tr>
</tbody>
</table>
| Definitions           | **Trading Partner:** The Buyer or Seller  
**Sender:** Supplier for Field Ticket, Proforma and Invoice, Buyer for Order create  
**Receiver:** Supplier for Order Create, Buyer for Field Ticket, Proforma, Invoice  
**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  
**Message:** Payload along with TRP protocol envelope  
**Payload:** Document content as agreed by trading partners  
**Routing Hub:** Intermediary that routes messages but does not participate in business process workflow  
**Network:** Intermediary that acts on behalf of buyer or seller and is a participant in the business process workflow |
| Description           | The sender is providing the PIDX document to particular receiver |
| Pre-condition         | Trading partners are exchanging PIDX XML documents |
| Post-conditions       | Accept or rejections with a dispute resolution process in place |
| Main Scenario         | The sender generates PIDX document based upon transactional data. The receiver sends a PIDX response document based on business decisions |
| Alternate Scenario    | The sender generates PIDX document based upon transactional data. The receiver sends an email notification response based on business decisions. |
| Recommended Best Practices | Receiver of the document should generate the response (XML/eMail) using only approved PIDX response codes and definitions  
Receiver should interrogate the entire document and include all rejection response codes in a single response. |
# Glossary of Terms

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PIDX Document</td>
<td>Optional PIDX tag containing first price attribute name and value pair;</td>
</tr>
<tr>
<td></td>
<td>complex type; contains <code>&lt;pidx:PriceAttributeName&gt;</code> and <code>&lt;pidx:PriceAttributeValue&gt;</code></td>
</tr>
<tr>
<td>ResponseReasonType</td>
<td>PIDX tag containing the document response code and description</td>
</tr>
<tr>
<td>Sender</td>
<td>Supplier; Generator of the Enhanced Price Sheet and the PIDX Invoice</td>
</tr>
<tr>
<td>Receiver</td>
<td>Supplier for Order Create, Buyer for Field Ticket, Proforma, Invoice</td>
</tr>
<tr>
<td>Sender</td>
<td>Supplier for Field Ticket, Proforma and Invoice, Buyer for Order</td>
</tr>
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<td>Intermediary:</td>
<td>Organization between Trading Partners that may handle routing and/or act on</td>
</tr>
<tr>
<td></td>
<td>behalf of Trading Partner at different stages in the business process</td>
</tr>
<tr>
<td></td>
<td>workflow</td>
</tr>
</tbody>
</table>