

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.

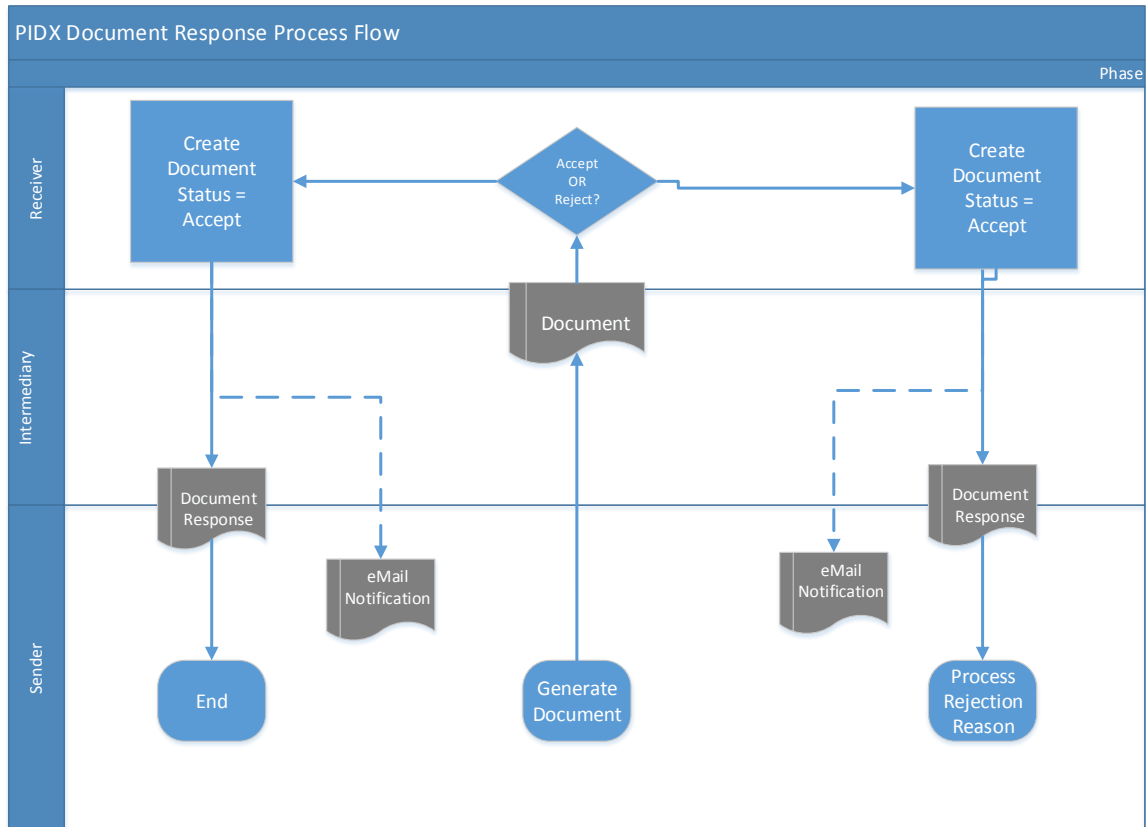
In addition to enhancing the list of approved codes, some members suggested that it would be useful if standard rejection reason codes were used, even outside the PIDX response documents. An example would be email notifications of document rejection. PIDX members spend an in-ordinate amount of time and 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 XML Response Code Definitions:

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**

Business process name	Sender provides PIDX Document information
Identifier	PIDX XML Document using (Order Create, Field Ticket, Proforma, Invoice)
Actors	Buyer, Seller or Intermediary may be involved
Definitions	<p>Trading Partner: The Buyer or Seller</p> <p>Sender: Supplier for Field Ticket, Proforma and Invoice, Buyer for Order create</p> <p>Receiver: Supplier for Order Create, Buyer for Field Ticket, Proforma, Invoice</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: Document content as agreed by trading partners</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>
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 Scenari	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.
Reference Documentation	PIDX Document Response Codes PTP Document ID: 02-562-20-55-2014

Glossary of Terms

Name	Description
PIDX Document	Optional PIDX tag containing first price attribute name and value pair; complex type; contains <pidx:PriceAttributeName> and <pidx:PriceAttributeValue>
ResponseReasonType	PIDX tag containing the document response code and description
Sender	Supplier; Generator of the Enhanced Price Sheet and the PIDX Invoice
Receiver	Supplier for Order Create, Buyer for Field Ticket, Proforma, Invoice
Sender	Supplier for Field Ticket, Proforma and Invoice, Buyer for Order
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