Oildex



Purchase Order Import

Integration Guide for Buyers

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Purchase Order Import

What is required for sending a Purchase Order to OpenInvoice?

There are two main technical requirements for sending purchase orders to OpenInvoice:

1. Construction of a purchase order XML file based on the PIDX standard pre-defined xml schema.
2. Data streaming to an OpenInvoice receiving URL via either HTTP or HTTPS protocol.

All data transmitted between OpenInvoice and buyers are carried out with a standard xml formatted document. Data needs to be posted to a receiving URL on OpenInvoice's side from the buyer's backend system.

1. For buyers using an OpenInvoice Support-installed secure server, the URL will reside on the secure server and data streaming will be conducted by HTTP Post with user name, password authentication.
2. For buyers who connect directly to OpenInvoice, the URL will reside on the OpenInvoice platform. Data streaming will be conducted by HTTPS Post with two-way SSL certificate exchange.

What is the difference between a Purchase Order Create and a Purchase Order Change?

The standard PIDX xml schema provides two interfaces for sending purchase order data: Order Create and Order Change.

Order Create is designed for sending the initial purchase order data to OpenInvoice. Once the purchase order has been created in OpenInvoice, subsequent changes made to the purchase order must be sent by Order Change.

To ease the implementation effort from the buyer's side, the first Order Change received will be treated as an original purchase order by OpenInvoice in the absence of an original Order Create. If an original Order Create arrives after an Order Change, it will be deemed to have arrived out of sequence. The result is that the original Order Create will not be imported.

With this in mind, we recommend only sending the Order Change schema to OpenInvoice for both the creation and modification of purchase orders.

All Order Changes posted by a client must be sequenced to ensure that the net result of two or more changes are applied properly. There are two methods that a buyer can use to sequence change requests:

1. Specify an integer value in the PIDX Order Change SequenceNumber element.
2. Specify a transmission date and time in the SOAP header.

Any change request received by OpenInvoice out of sequence will not be imported into the system and will not be presented to the supplier. An error response will be returned to the origin and an email notification is sent to pre-defined notification users configured within OpenInvoice.

For example, assume the buyer has submitted three change requests. "CR1", "CR2", and "CR3". However, the change requests arrive at OpenInvoice in the order CR1, CR3, and then CR2.

The result is that CR1 and CR3 will be correctly imported into OpenInvoice and CR2 will not be imported into OpenInvoice system because it arrived out of sequence.

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Note: Any imported Order Change must be the complete purchase order. Any data not included in the Order Change will be assumed to have been deleted from the purchase order.

How is a Purchase Order transmitted to OpenInvoice?

For buyers using a secure server, the generated purchase order message will be sent to the secure server receiving URL via HTTP protocol with user name/password authentication. The user name and password will be provided by OpenInvoice Support.

The OpenInvoice secure server receiving URLs are:

Test Environment:

http:///(test secure server IP and port)/invoke/DO2Partner/postToDO2Test

Production Environment:

http:///(production secure server IP and port)/invoke/DO2Partner/postToDO2

For buyers not using a secure server, the generated purchase order message will be sent to the OpenInvoice receiving URL via HTTPS protocol with two way certificate exchange.

Test Environment:

https://onboard-xml.openinvoice.com/invoke/do2/receive

Production Environment:

https://xml.openinvoice.com/invoke/do2/receive

For all of the transmission options, the conversation will be synchronous. Within the same transaction, OpenInvoice will send back a HTTP/HTTPS response code and response message indicating the success or failure of the document transfer. A successful transaction will be indicated with the return of an HTTP/HTTPS status code in the 200 class. This means the purchase order was successfully received, understood, and imported. A failed transaction will be indicated with the return of an HTTP/HTTPS status code in the 400 or 500 class. The HTTP/HTTPS response would also contain a message complying with DOResponse.xsd schema. Error messages and warning messages associated with the purchase order import failure are presented in the DOResponse.

We recommend our clients to keep the number of line items on a purchase order under 500 to avoid possible system performance related issues.

Can attachments be sent with a Purchase Order?

Often purchase order terms and conditions along with other supplementary documents need to be sent with purchase orders. OpenInvoice supports the sending of attachments with purchase orders electronically. A different file format is required when attachments are sent with purchase orders. Please refer to the section “What is the format for Purchase Order posting” for details.

What is the format for Purchase Order posting?

The format requirements for purchase order posting is based on whether attachments need to be sent along with purchase orders.

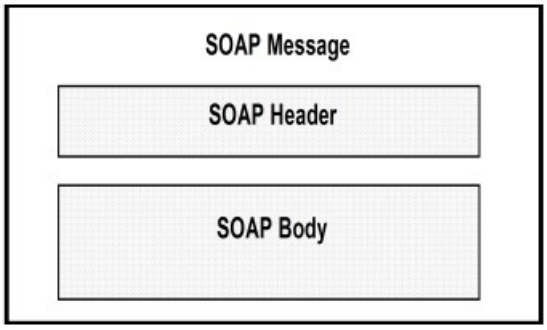
Format for sending purchase orders without attachments

Purchase orders will be transmitted within Simple Object Access Protocol (SOAP) specifications and will contain a SOAP header and a SOAP body.

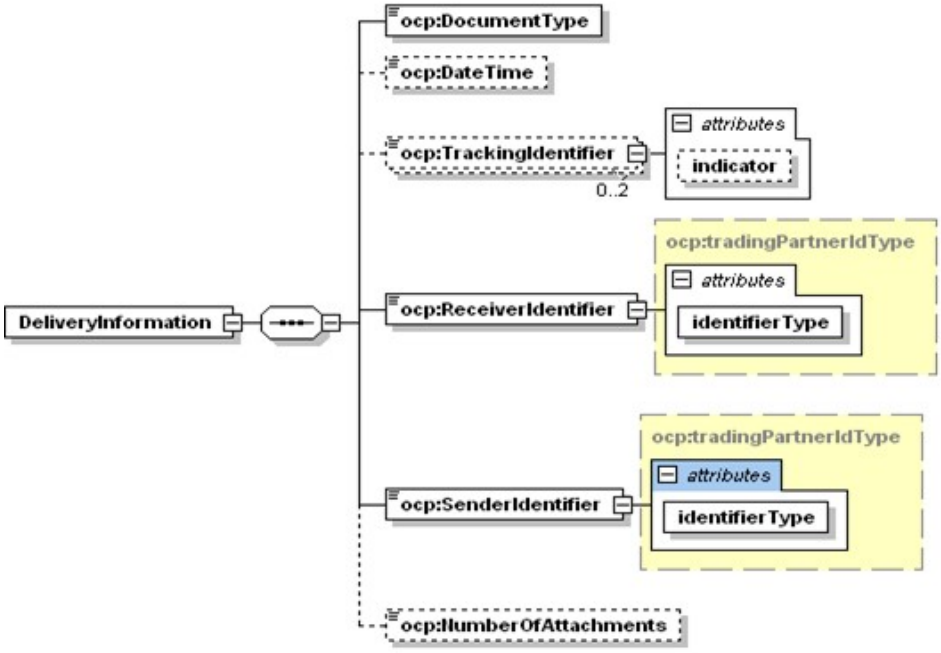
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The HTTP(S) header parameter “Content-Type” will need to be set to “text/xml” when sending purchase orders without attachments.

The SOAP message will consist of a SOAP envelope, SOAP header and a SOAP body.

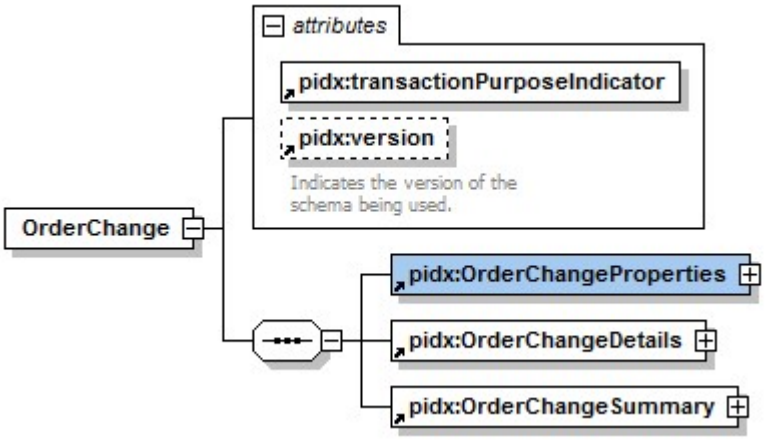


The SOAP header will contain XML conforming to the OpenInvoice-defined DeliveryInformation.xsd schema. The following diagram shows the structure of the DeliveryInformation schema. The main purpose of the SOAP header is to specify transmission information such as the sender, receiver etc.



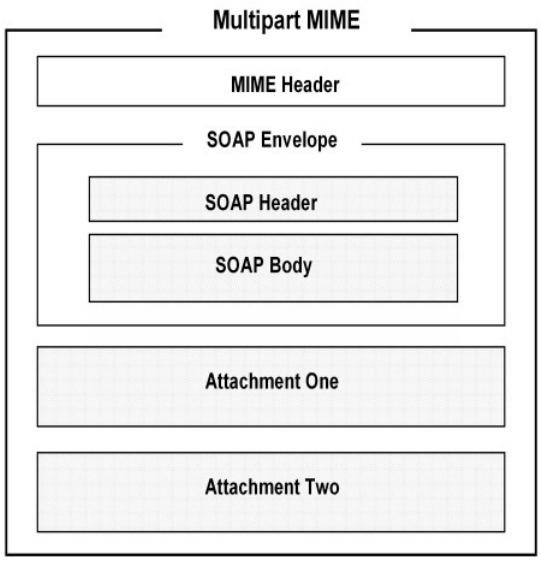
The SOAP body will contain XML conforming to the PIDX OrderCreate or OrderChange schemas (version 1.2). OpenInvoice Support will provide the schemas upon request or these can be found in the Resource Center accessed from the OpenInvoice application.

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Format for sending purchase orders with attachments

Purchase orders with attachments should be sent in Multipart MIME (Multipurpose Internet Mail Extensions) format.



Attachments to the Purchase Order document will conform to one of the following file formats with the appropriate Content-Type specified in the MIME message:

File Type	Content-Type
tiff	image/tiff
pdf	application/pdf
gif	image/gif
jpeg	image/jpeg
png	image/png
dwg	application/image/vnd.dwg

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File Type	Content-Type
doc	application/msword
docx	application/msword
txt	text/plain
xls	application/vnd.ms-excel
xlsx	application/vnd.ms-excel
tsv	text/plain

The entire message, including the document and all of its attachments, will be processed as a single transaction. If any piece of the message cannot be processed, the entire message will be rejected with neither the document nor the attachments being retained.

The following guidelines must be followed when including attachments within the message:

1. Each attachment must not exceed 6 MB in size when in an unzipped (non-compressed) state.
2. Attachments will be transferred to OpenInvoice in an unzipped (non-compressed) state.
3. A message may have zero, one, or multiple attachments.
4. Binary attachments are encoded to a text representation. OpenInvoice requires the use of Base64 encoding.
5. The attachment must be defined within a pidx:Attachment element in the business document and can appear either at the PO header level or at the PO line item level.
6. The location of the attachment information within the MIME message will conform to the W3C document “SOAP Messages with Attachments” specification. The document payload will be sent as Part 1 of the document and attachments will follow with each attachment being separated by a MIME boundary.
7. Information about an attachment and its location within the multipart MIME message must be defined by the pidx:Attachment element within the PIDX document. The URI within the pidx:AttachmentLocation element will be used to match against the MIME parts “content-id” parameter which contains the binary attachment. The following is an example of the required elements that must be populated within the PIDX document:

```
<pidx:Attachment>
<pidx:AttachmentPurposeCode>Other</pidx:AttachmentPurposeCode>
<pidx:AttachmentTitle>Header Attachment 1</pidx:AttachmentTitle>
<pidx:AttachmentDescription>Attachment Description</pidx:AttachmentDescription>
<pidx:AttachmentLocation>cid:attachment1.txt</pidx:AttachmentLocation>
</pidx:Attachment>
The MIME part must define the content-id parameter similar to the following:
------=_Part_460_3301070.1156256381386
content-type: text/plain
content-transfer-encoding: base64
content-id: attachment1.txt
… This is the attachment body …
------=_Part_460_3301070.1156256381386
The HTTP(S) header parameter “Content-Type” needs to be set to the following when sending purchase orders without attachments.
multipart/related;type="multipart/related";boundary="MIME-Boundary"
```


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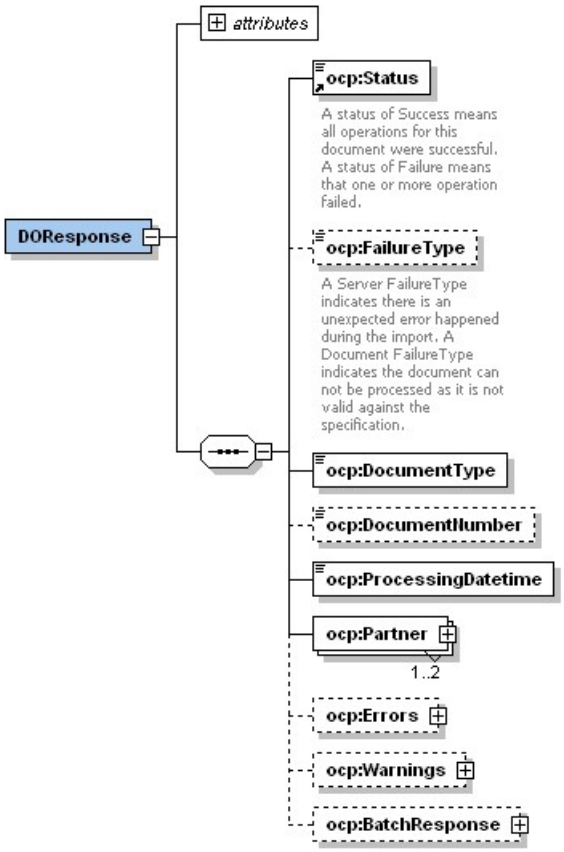
What happens when a Purchase Order import fails?

Purchase order imports may fail due to reasons such as:

- Broken connectivity between OpenInvoice and the buyer's server.
- The purchase order xml contains data that fails xml schema or business rule validation.

In these cases, an HTTP/HTTPS status code in the 400 or 500 class will be sent back to the buyer's server. The HTTP/HTTPS response would also contain a SOAP wrapped message complying with the DOResponse.xsd schema. Error messages and warning messages (if there are any) associated with the purchase order import failure are presented in the DOResponse. The DOResponse allows buyers to address the cause of failure, resend the purchase order or contact OpenInvoice Support for further help.

Email notifications can also be configured to be sent to a specific user(s) within OpenInvoice.



Pre-accepted Purchase Orders

OpenInvoice currently does not support Purchase Order Responses from B2B integrated suppliers. As such, buyers will need to issue pre-accepted purchase orders to B2B integrated suppliers.

The pidx:SpecialInstructions tag is used to indicate whether a purchase order has been "pre-accepted".

Example:

```
<pidx:SpecialInstructions instructionIndicator="Other"
definitionOfOther="DocumentState">Accepted</pidx:SpecialInstructions>
```

If this element is missing or if the value is "New", the purchase order will be imported as "New" and will require manual acceptance by the supplier.

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Determining the Buyer's Site

A buyer will be able to send a purchase order to a supplier from a specific buyer site. OpenInvoice will resolve to a single buyer site using the following mechanism (in order of precedence):

- If there is only one buyer site defined in the application, then use that buyer site;
- Derive buyer site from the "Non-Billing Inquiries" information specified in the PO xml;
- Derive buyer site from the "Bill To" information specified in the PO xml;
- Use the buyer's default site.

Deriving buyer site from the "Non-Billing Inquiries" or the "Bill To" information will use (in order of precedence):

- Buyer site or department DUNS+4 number;
- Buyer site postal code;

Determining the Buyer's Workflow Routing

A buyer will be able to flag a purchase order to a specified workflow in OpenInvoice. You can send the PO to either the "ClientInvoiceProcessing" or "OpenInvoiceProcessing" workflows.

The pidx:SpecialInstructions tag is used to indicate whether a purchase order has been flagged for a workflow.

Examples:

```
<pidx:SpecialInstructions instructionIndicator="Other"
definitionOfOther="InvoiceRoutingInsructions">OpenInvoiceProcessing</pidx:SpecialInstructions>
<pidx:SpecialInstructions instructionIndicator="Other"
definitionOfOther="InvoiceRoutingInstructions">ClientInvoiceProcessing</pidx:SpecialInstructions>
```

Detail Order vs. Limit Order Purchase Orders

A **Detail Order** is a PO line which includes a supplier product or service as well as a defined quantity, rate and unit of measure for the product or service ordered.

Example:

```
<pidx:LineItemInformation>
    <pidx:LineItemIdentifier identifierIndicator="AssignedByBuyer">1234567</pidx:LineItemIdentifier>
    <pidx:LineItemIdentifier identifierIndicator="AssignedBySeller">PRODUCT</pidx:LineItemIdentifier>
    <pidx:LineItemDescription>A description of the seller's product or service</pidx:LineItemDescription>
</pidx:LineItemInformation>
```

For suppliers/vendors who submit invoices with multilevel line items. The LineItemDescription has to match the supplier/vendor's catalog description.

```
<pidx:LineItemInformation>
    <pidx:LineItemIdentifier identifierIndicator="AssignedByBuyer">1234567</pidx:LineItemIdentifier>
    <pidx:LineItemIdentifier identifierIndicator="AssignedBySeller">PRODUCT</pidx:LineItemIdentifier>
    <pidx:LineItemDescription>PRODUCT 1 // PRODUCT 2 // PRODUCT 3</pidx:LineItemDescription>
</pidx:LineItemInformation>
```

A **Limit Order** is a PO line which does not have detail order information. It represents a maximum dollar value that can be invoiced for all products and services associated with the work request.

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Please note an empty “AssignedbySeller” xml tag should be present in order to flag the PO line item as a LimitOrder line. Alternatively, the absence of an “AssignedBySeller” xml tag will also denote the PO line item as a LimitOrder line.

Example:

```
<pidx:LineItemInformation>
    <pidx:LineItemIdentifier identifierIndicator="AssignedByBuyer">1234567</pidx:LineItemIdentifier>
    <pidx:LineItemIdentifier identifierIndicator="AssignedBySeller"/>
    <pidx:LineItemDescription>A description of the seller’s product or service</pidx:LineItemDescription>
</pidx:LineItemInformation>
```

Data Mapping

Order Change Information

The following table outlines how the XML field values should be derived from Purchase Order Change data. For information on the Order Create schema please contact OpenInvoice Support.

Tag	Data type	Usage	Description / Business Rules
OrderChange		Mandatory	Purchase Order Package
OrderChange/TransactionPurposeIndicator	“Replace” “Change”	Mandatory	Purchase Order message purpose qualifier.
OrderChange/OrderChangeProperties		Mandatory	**Parent element** which contains the Order Header information
../OrderChangeProperties/OrderChangeNumber	String (35)	Mandatory	Purchase Order change request number (not an original PO)
../OrderChangeProperties/OrderChangeDate	Date YYYY-MM-DD	Mandatory	Purchase Order change request date
../OrderChangeProperties/PurchaseOrderInformation		Mandatory	**Parent element** of the package carrying the original Purchase Order Information
../OrderChangeProperties/PurchaseOrderNumber	String (35)	Mandatory	Original Purchase Order number. Purchase Order number cannot be modified.
../OrderChangeProperties PartnerInformation		Mandatory	**Parent element** for specifying buyer and seller information. Please see “Partner Information” section for details. Customer identifies package with buyer DUNS. Please note Buyer/Buyer site cannot be modified by an order change.

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Tag	Data type	Usage	Description / Business Rules
../OrdreChangeProperties/SequenceNumber	Integer	Mandatory	An Integer value that specifies the sequence of order changes. Any change request received by OpenInvoice out of sequence will not be imported.
../OrderChangeProperties/PrimaryCurrency		Mandatory	**Parent element** of the Currency package code
../OrderChangeProperties/PrimaryCurrency/ CurrencyCode	OpenInvoice supports all ISO compatible currency codes. eg. “CAD” “USD” “GBP” “EUR” “ARS” “COP”	Mandatory	Currency of the Purchase Order entered by the Buyer.
../OrderChangeProperties/TransportInformation		Optional	**Parent element** for specifying how product is transported.
../OrderChangeProperties/TransportInformation/ ShipmentMethodOfPayment	“Collect-FreightCreditedBackToCustomer” “ServiceFreight-NoCharge” “CustomerPickupBackhaul” “Prepaid-ChargedToCustomer” “PrepaidBySeller” “Pickup” “ThirdPartyPay”	Mandatory	Payment terms for transportation charges “Collect” will not be used
../OrderChangeProperties/TransportInformation/ ShipmentTermsCode	String (3)	Mandatory	Standard 3-letter international commerce terms. E.g. “FOB”, “CIF”, “DDP”.

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Tag	Data type	Usage	Description / Business Rules
../OrderChangeProperties/PaymentTerms		Optional	**Parent element** for specifying the payment terms of the Purchase Order. Specifies the period allowed to the buyer to pay off the amount due on the resulting invoices.
../OrderChangeProperties.PaymentTerms/ PaymentTermsOfSale	String (255)	Mandatory	The conditions under which the sale is transacted. Free text description of payment terms.
../SpecialInstructions		Optional may have multiple occurrence	**Parent element** for specifying requirements or instructions to Suppliers from Buyer or Accpeting a PO or Flagging a Workflow
../OrderChangeProperties/SpecialInstructions @instructionIndicator	Enumeration: “CarrierInstructions”	Optional	Identifies the type of Special Instructions to Supplier.
../OrderChangeProperties/SpecialInstructions @instructionIndicator	Enumeration: “Other”	Optional	Package to Accept the PO.
../OrderChangeProperties/SpecialInstructions @instructionIndicator definitionOfOther	Enumeration: “DocumentState”	Mandatroy	The code to import the PO as accepted. “Accepted”
../OrderChangeProperties/SpecialInstructions @instructionIndicator	Enumeration: “Other”	Optional	Package to flag the workflow for the PO
../OrderChangeProperties/SpecialInstructions @instructionIndicator definitionOfOther	Enumeration: “InvoiceRoutingInstructions”	Mandatory	The code to flag the workflow. “OpenInvoiceProcessing” or “ClientInvoiceProcessing”
../OrderChangeProperties/Attachment		Optional may have multiple occurrence	**Parent element** for specifying the attachment package. Please note that once an attachment is created, it cannot be updated or deleted.
../OrderChangeProperties/Attachment/ AttachmentPurposeCode	Enumeration: “Other”	Mandatory	The code to indicate the purpose of the attachment

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Tag	Data type	Usage	Description / Business Rules
../OrderChangeProperties/Attachment/ AttachmentTitle	String (100)	Mandatory	Attachment name (currently is not displayed in the UI)
../OrderChangeProperties/Attachment/ AttachmentDescription	String (2000)	Mandatory	Attachment description that will be displayed to the Supplier
../OrderChangeProperties/Attachment/ AttachmentLocation	String	Mandatory	A CID location identified in the MIME section with the attachment.
../Comment	String(2000)	Optional	Optional comment entered on Purchase Order.

Partner Information

Tag	Data type	Usage	Business Rules
..OrderChangeProperties/PartnerInformation/ partnerRoleIndicator	"**SoldTo**"	Mandatory	Buyer identification **package** with buyers DUNS. Any changes to this element will be ignored.
../PartnerInformation/PartnerIdentifier @partnerIdentifierIndicator	"DUNSNumber"	Mandatory	DUNS number of the Buyer
../PartnerInformation/partnerRoleIndicator	"**BillTo**"	Optional	Buyer identification **package** with invoicing address and contacts.
../PartnerInformation/PartnerIdentifier @partnerIdentifierIndicator	"DUNSNumber"	Mandatory	DUNS number of Buyer
../PartnerInformation/PartnerName	String (255)	Optional	Buyer Name
../PartnerInformation/AddressInformation		Optional	**Parent element** package containing Buyer's address for invoicing.
../ParentInformation/AddressInformation/ AddressLine	String (100)	Optional may have multiple occurrences	Address line, including building, street and apt., (but not postal code, region or country), e.g. "707 – 8th AVENUE SW"
../ParentInformation/AddressInformation/CityName	String (50)	Optional	City Name, e.g."Calgary"

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Tag	Data type	Usage	Business Rules
../PartnerInformation/AddressInformation/StateProvince	String (50)	Optional	Validated field. Sate or Province code or name e.g. “AB”, “SK” or “Alberta”, “Saskatchewan”
../PartnerInformation/AddressInformation/PostalCode	String (10)	Optional	Postal or Zip code
../PartnerInformation/AddressInformation/PostalCountry		Optional	**Parent element** of country code package.
../PartnerInformation/AddressInformation/PostalCountry/CountryCode	String (50)	Mandatory	Validated field. Country code or name, e.g. “CA”, “US” or “CANADA”, “United States of America”.
../PartnerInformation/ContactInformation		Optional	**Parent element** of Buyer’s billing contacts package.
../PartnerInformation/ContactInformation/Telephone		Optional, may have multiple occurrences	**Parent element** of Buyer’s telephone number
../PartnerInformation/ContactInformation/Telephone@telephoneIndicator	“Voice”	Mandatory	Phone type indicator
../PartnerInformation/ContactInformation/Telephone/PhoneNumber	String (255)	Mandatory	Phone number for billing inquiries.
../PartnerInformation/ContactInformation/Telephone@telephoneIndicator	“Fax”	Optional	Phone type indicator
../PartnerInformation/ContactInformation/Telephone/PhoneNumber	String (255)	Optional	Fax number for billing inquiries
../PartnerInformation/ContactInformation/EmailAddress	String (255)	Optional	Email address for billing inquiries

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Tag	Data type	Usage	Business Rules
../PartnerInformation/partnerRoleIndicator	"**MaterialIssuer**"	Optional	Buyer identification **package** with requisitioner information
../PartnerInformation/PartnerIdentifier @partnerIdentifierIndicator	"DUNSNumber"	Mandatory	DUNS number of the Buyer
../PartnerInformation/ContactInformation		Mandatory	**Package** with Requisitioners contact information. You can use Employee ID or FirstName LastName
../PartnerInformation/ContactInformation @contactInformationIndicator	"PurchasingAgent"	Mandatory	Type of contact
../PartnerInformation/ContactInformation/ ContactIdentifier	String (50)	Optional	FirstName LastName
../PartnerInformation/ContactInformation/ ContactIdentifier@contactIdentifierIndicator	"EmployeeID"	Optional	Type of contact code
../PartnerInformation/ContactInformation/ ContactName	String	Optional	Employee ID of the requisitioner.
../PartnerInformation/partnerRoleIndicator	"**ShipToParty**"	Optional	Buyer identification **package** with shipping to party.
../PartnerInformation/PartnerIdentifier @partnerIdentifierIndicator	"DUNSNumber"	Mandatory	DUNS number of the Buyer
../PartnerInformation/PartnerName	String (255)	Optional	Buyer name
../PartnerInformation/AddressInformation		Optional	**Parent element** which contains complete address information.
../ParentInformation/AddressInformation/ AddressLine	String (100)	Optional may have multiple occurrences	Address line, including building, street and apt., (but not postal code, region or country), e.g. "707 – 8th AVENUE SW"

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Tag	Data type	Usage	Business Rules
../ParentInformation/AddressInformation/CityName	String (50)	Optional	City Name, e.g.”Calgary”
../PartnerInformation/AddressInformation/StateProvince	String (50)	Optional	Validated field. Sate or Province code or name e.g. “AB”, “SK” or “Alberta”, “Saskatchewan”
../PartnerInformation/AddressInformation/PostalCode	String (10)	Optional	Postal or Zip code
../PartnerInformation/AddressInformation/PostalCountry		Optional	**Parent element** of country code package.
../PartnerInformation/AddressInformation/PostalCountry/CountryCode	String (50)	Mandatory	Validated field. Country code or name, e.g. “CA”, “US” or “CANADA”, “United States of America”.
../PartnerInformation/AddressInformation/LocationIdentifier	String	Optional	A qualifier for ship to location code. The qualifier of the location code. Currently this is NOT sent to suppliers.
../PartnerInformation/AddressInformation/LocationIdentifier/LocationCode	String	Optional	Ship to location code, can be DUNS+4 or plant number etc.
../PartnerInformation/ContactInformation		Optional	**Parent element** of Buyer’s shipping to contacts package.
../PartnerInformation/ContactInformation/Telephone		Optional	**Parent element** of Buyer’s telephone number
../PartnerInformation/ContactInformation/Telephone@telephoneIndicator	“Voice”	Optional	Phone type indicator
../PartnerInformation/ContactInformation/Telephone/PhoneNumber	String (255)	Optional	Phone number for shipping to party.

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Tag	Data type	Usage	Business Rules
../PartnerInformation/ContactInformation/ Telephone@telephoneIndicator	“Fax”	Optional	Phone type indicator
../PartnerInformation/ContactInformation/ Telephone/PhoneNumber	String (255)	Optional	Fax number for shipping to party
../PartnerInformation/ContactInformation/ EmailAddress	String (255)	Optional	Email address for shipping party
../PartnerInformation/partnerRoleIndicator	“**Seller**”	Mandatory	Supplier identification **package**.
../PartnerInformation/PartnerIdentifier @partnerIdentifierIndicator	“AssignedByBuyer”	Mandatory	Type of Partner code.
../PartnerInformation/PartnerRoleIndicator	“**FinalRecipient**”	Optional	Buyer identification **package** with Final Recipient information
../PartnerInformation/PartnerIdentifier @partnerIdentifierIndicator	“DUNSNumber”	Mandatory	DUNS number of Buyer
../PartnerInformation/PartnerName	String (255)	Mandatory	Buyer Name
../PartnerInformation/AddressInformation		Optional	**Parent element** of Buyer’s address for final recipient.
../PartnerInformation/AddressInformation/AddressLine	String (100)	Optional may have multiple occurrences	Address line, including building, street and apt., (but not postal code, region or country), e.g. “707 – 8th AVENUE SW”
../PartnerInformation/AddressInformation//CityName	String (50)	Optional	City
../PartnerInformation/AddressInformation/ StateProvince	String (25)	Optional	State or Province
../PartnerInformation/AddressInformation/PostalCode	String (25)	Optional	ZIP or Postal Code

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Tag	Data type	Usage	Business Rules
../PartnerInformation/AddressInformation/ PostalCountry		Optional	**Parent element** of country code package.
../PartnerInformation/AddressInformation/ PostalCountry/CountryCode	String (50)	Mandatory	Validated field. Country code or name, e.g. “CA”, “US” or “CANADA”, “United States of America”.
../PartnerInformation/ContactInformation		Optional	**Parent element** of Buyer’s final recipient contact.
../PartnerInformation/ContactInformation/ Telephone		Optional	**Parent element** of Buyer’s final recipient telephone number
../PartnerInformation/ContactInformation/ Telephone@telephoneIndicator	“Voice”	Optional	Phone type indicator
../PartnerInformation/ContactInformation/ Telephone/PhoneNumber	String (255)	Optional	Phone number for final recipient.
../PartnerInformation/ContactInformation/ Telephone@telephoneIndicator	“Fax”	Optional	Phone type indicator
../PartnerInformation/ContactInformation/ Telephone/PhoneNumber	String (255)	Optional	Fax number for final recipient
../PartnerInformation/ContactInformation/ EmailAddress	String (255)	Optional	Email address for final recipient
../PartnerInformation/partnerRoleIndicator	“**Other**”	Optional	Buyer identification **package** for the contact name and address where general inquires and messages are to be sent.
../PartnerInformation/definitionOfOther		Mandatory	“NonBillingInquires”

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Tag	Data type	Usage	Business Rules
../PartmerInformation/PartnerIdentifier @partnerIdentifierIndicator	“DUNSNumber”	Mandatory	DUNS number of Buyer
../PartnerInformation/PartnerName	String (255)	Optional	Buyer Name
../Partner/Site/Address		Optional	**Parent element** of Address information for non billing inquires
../Partner/Site/Address/AddressLine	String (100)	Optional may have multiple occurrences	Address line, including building, street and apt., (but not postal code, region or country), e.g. “707 – 8th AVENUE SW”
../Partner/Site/Address/City	String (50)	Optional	City
../Partner/Site/Address/StateProvince	String (25)	Optional	State or Province
../Partner/Site/Address/PostalZipCode	String (25)	Optional	Zip or Postal Code
../PartnerInformation/AddressInformation/ PostalCountry		Optional	**Parent element** of country code package.
../PartnerInformation/AddressInformation/ PostalCountry/CountryCode	String (50)	Mandatory	Validated field. Country code or name, e.g. “CA”, “US” or “CANADA”, “United States of America”.
../PartnerInformation/ContactInformation		Optional	Parent element of Buyer’s non billing contacts.
../PartnerInformation/ContactInformation @contactinformationindicator	“BuyerDepartment”	Mandatory	Type of contact
../PartnerInformation/ContactInformation/ Telephone		Optional	**Parent element** of Buyer’s final Non-Billing Inquiries telephone number
../PartnerInformation/ContactInformation/ Telephone@telephoneIndicator	“Voice”	Optional	Phone type indicator

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Tag	Data type	Usage	Business Rules
../PartnerInformation/ContactInformation/ Telephone/PhoneNumber	String (255)	Optional	Phone number for non billing inquires
../PartnerInformation/ContactInformation/ Telephone@telephoneIndicator	“Fax”	Optional	Phone type indicator
../PartnerInformation/ContactInformation/ Telephone/PhoneNumber	String (255)	Optional	Fax number for non billing inquires
../PartnerInformation/ContactInformation/ EmailAddress	String (255)	Optional	Email address for non billing inquires.

Order Change Details

Tag	Data type	Usage	Description / Business Rules
../OrderChangeDetails/OrderChangeLineItem		Mandatory may have multiple occurrence	**Parent element** identifying Line Item Details

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Tag	Data type	Usage	Description / Business Rules
../OrderChangeDetails/OrderChangeLineItem/ LineItemNumber	String (10)	Mandatory may have multiple occurrence	Line item indicator; must be unique within a PO, otherwise reject a PO at the transport level with a message: “Duplicate line number” If a line number on the change order does not exist on the purchase order then OpenInvoice will interpret this as a request to add a new line to the purchase order. If a line number exists on the change request and the purchase order than OpenInvoice will interpret this as a request to modify the purchase order line. If a line does not exist on the change request but does exist on the purchase order then OpenInvoice will interpret this as a request to delete the purchase order line. Note that the deletion of a purchase order line is implemented by modifying the quantity (for a detail line) or amount (for a limit order line) to be zero.
../OrderChangeDetails/OrderChangeLineItem/ ItemDetailChangeCode	“ModifyOther”	Mandatory	The code of change. “ModifyOther” will not be parsed.
../OrderChangeDetails/OrderChangeLineItem/ LineItemInformation		Mandatory	**Parent element** of the package identifying product/service
../OrderChangeDetails/OrderChangeLineItem/ LineItemInformation/LineItemIdentifier		Optional (must have one identifier)	Unique value identifying the product or service in the buyer’s purchasing system.

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Tag	Data type	Usage	Description / Business Rules
../OrderChangeDetails/OrderChangeLineItem/ LineItemInformation/LineItemIdentifier @identifierIndicator	“AssignedByBuyer”	Mandatory	Unique value identifying the product or service in the buyer’s purchasing system.
../OrderChangeDetails/OrderChangeLineItem/ LineItemInformation/LineItemIdentifier		Optional (must have one identifier)	Manufacture Code for the product/service.
../OrderChangeDetails/OrderChangeLineItem/ LineItemInformation/LineItemIdentifier @identifierIndicator	“AssignedByManufacture”	Mandatory	Manufacture code for the product or service
../OrderChangeDetails/OrderChangeLineItem/ LineItemInformation/LineItemIdentifier		Optional (must have one identifier)	Unique value identifying the product or service in the Seller’s Catalogue. IF the value is null, then the PO line item is a limit PO line item.
../OrderChangeDetails/OrderChangeLineItem/ LineItemInformation/LineItemIdentifier @identifierIndicator	“AssignedBySeller”	Mandatory	Unique value identifying the product or service in the seller’s catalogue. PO line item type is limit PO if the value is nill.
../OrderChangeDetails/OrderChangeLineItem/ LineItemInformation/LineItemDescription	String (2000)	Mandatory	Free-text description of ordered product/service
../OrderChangeDetails/OrderChangeLineItem/ LineItemInformation/ManufacturerIdentifier	String	Optional	Manufacturer company name
../OrderChangeDetails/OrderChangeLineItem/ PartnerInformation		Mandatory with multiple occurrences	**Package**: Refer to Partner Information section. “ShipToParty”

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Tag	Data type	Usage	Description / Business Rules
../OrderChangeDetails/OrderChangeLineItem/PartnerInformation/PartnerInformation/@partnerRoleIndicator	“ShipToParty”	Mandatory	Type of partner
../OrderChangeDetails/OrderChangeLineItem/PartnerInformation/partnerIdentifier		Mandatory	DUNS number of the ship to party
../OrderChangeDetails/OrderChangeLineItem/PartnerInformation/PartnerIdentifier/@partnerIdentifierIndicator	“DUNSNumber”	Mandatory	Type of partner code.
../OrderChangeDetails/OrderChangeLineItem/PartnerInformation/PartnerName	String (255)	Optional	Buyer Name
../OrderChangeDetails/OrderChangeLineItem/PartnerInformation/AddressInformation		Optional	**Parent element** of Address information for Buyer’s address for shipping
../OrderChangeDetails/OrderChangeLineItem/PartnerInformation/AddressLine	String (100)	Optional may have multiply occurrences	Address line, including building, street and apt., (but not postal code, region or country), e.g. “707 – 8th AVENUE SW”
../OrderChangeDetails/OrderChangeLineItem/PartnerInformation/CityName	String (50)	Optional	City name
../OrderChangeDetails/OrderChangeLineItem/PartnerInformation/StateProvince	String (50)	Optional	Validated field. State or Providence code or name.
../OrderChangeDetails/OrderChangeLineItem/PartnerInformation/PostalCode	String (10)	Optional	Postal or zip code.

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Tag	Data type	Usage	Description / Business Rules
../OrderChangeDetails/OrderChangeLineItem/ PartnerInformation/PostalCountry		Optional	**Parent element** of the country code package
../OrderChangeDetails/OrderChangeLineItem/ PartnerInformation/PostalCountry/CountryCode	String (50)	Mandatory	Validated field. Country code or name. E.g. “CA”, “US” or “CANADA”, “Unites States of America”
../OrderChangeDetails/OrderChangeLineItem/ PartnerInformation/LocationIdentifier	String	Optional	The qualifier of the location code. Currently this is NOT sent to suppliers
../OrderChangeDetails/OrderChangeLineItem/ PartnerInformation/LocationCode	String	Optional	Ship to location code, can be DUNS+4 or plant number etc.
../OrderChangeDetails/OrderChangeLineItem/ PartnerInformation/ContactInformation		Optional	**Parent element** to the package containing the buyer’s shipping to contacts
../OrderChangeDetails/OrderChangeLineItem/ PartnerInformation/ContactInformation/Telephone		Optional	**Package** with phone number for shipping to party
../OrderChangeDetails/OrderChangeLineItem/PartnerInformation/ContactInformation/Telephone/Telephone @telephoneIndicator	“Voice”	Mandatory	Phone type indicator
../OrderChangeDetails/OrderChangeLineItem/PartnerInformation/ContactInformaiton/Telephone/ PhoneNumber	String (255)	Mandatory	Phone number for ship to party
../OrderChangeDetails/OrderChangeLineItem/ PartnerInformation/ContactInformation/Telephone		Optional	**Package** with fax number for shipping to party

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Tag	Data type	Usage	Description / Business Rules
../OrderChangeDetails/OrderChangeLineItem/ PartnerInformation/ContactInformation/Telephone/ Telephone@telephoneIndicator	“Fax”	Mandatory	Phone type indicator
../OrderChangeDetails/OrderChangeLineItem/PartnerInformation/ContactInformaiton/Telephone/ PhoneNumber	String (255)	Mandatory	Fax number for ship to party
../OrderChangeDetails/OrderChangeLineItem/ PartnerInformation/ContactInformation/EmailAddress	String (255)	Optional	Email address for ship to party
../OrderChangeDetails/OrderChangeLineItem/ OrderQuantity		Mandatory	**Parent element** of order quantity
../OrderChangeDetails/OrderChangeLineItem/ OrderQuantity/Quantity	Decimal (6)	Mandatory	Quantity of product/service ordered
../OrderChangeDetails/OrderChangeLineItem/ OrderQuantity/UnitOfMeasureCode	String (10)	Mandatory	Unit of measure of product/services orders
../OrderChangeDetails/OrderChangeLineItem/Pricing		Mandatory	**Parent element** for ordered products pricing details
../OrderChangeDetails/OrderChangeLineItem/Pricing/UnitPrice		Mandatory	**Package** with expected (as opposed to budgeted) product/service unit price
../OrderChangeDetails/OrderChangeLineItem/Pricing/UnitPrice/MonetaryAmount	Decimal (6)	Mandatory	Ordered product/service amount per the unit of measure below
../OrderChangeDetails/OrderChangeLineItem/Pricing/UnitPrice/UnitOfMeasureCode	String (10)	Mandatory	Unit of measure of quoted above amount

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Tag	Data type	Usage	Description / Business Rules
../OrderChangeDetails/OrderChangeLineItem/ ServiceDateTime		Optional	**Parent element** identifying the service date start.
../OrderChangeDetail/OrderChangeLineItem/ ServiceDateTime@dateTimeIndicator	“ServicePeriodStart”	Mandatory	Date of the start of the service period
../OrderChangeDetails/OrderChangeLineItem/ ServiceDateTime		Optional	**Parent element** identifying the service date end.
../OrderChangeDetail/OrderChangeLineItem/ ServiceDateTime@dateTimeIndicator	“ServiceDateEnd”	Mandatory	Date of the end of the service period.
../OrderChangeDetails/OrderChangeLineItem/ ../SpecialInstructions		Optional	**Parent element** for specifying special instructions for this line item
../OrderChangeDetails/OrderChangeLineItem/ ../SpecialInstructions@instructionIndicator	Enumeration: “Tolerances”	Optional	Allowed Values: “Yes”, “No” “Yes” indicates this PO line will tolerate a variance in price and/or over fulfillment. If this tag is not used, default is “No”
../OrderChangeDetail/OrderChangeLineItem/ ReferenceInformation@referenceInformationIndicator	“AFENumber”	Mandatory	Type of reference data
../OrderChangeDetail/OrderChangeLineItem/ ReferenceInformation/ReferenceNumber	String (25)	Mandatory	AFE Number
../OrderChangeDetail/OrderChangeLineItem/ ReferenceInformation		Optional	**Parent element** of the Cost Center package information
../OrderChangeDetail/OrderChangeLineItem/ ReferenceInformation@referenceInformationIndicator	“CostCenter”	Mandatory	Type of reference data

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Tag	Data type	Usage	Description / Business Rules
../OrderChangeDetail/OrderChangeLineItem/ReferenceInformation/ReferenceNumber	String (25)	Mandatory	CostCenter Number
../OrderChangeDetail/OrderChangeLineItem/ReferenceInformation		Optional	**Parent element** of the contract package information
../OrderChangeDetail/OrderChangeLineItem/ReferenceInformation@referenceInformationIndicator	“ContractNumber”	Mandatory	Type of reference data
../OrderChangeDetail/OrderChangeLineItem/ReferenceInformation/ReferenceNumber	String (25)	Mandatory	Contract Number
../OrderChangeDetail/OrderChangeLineItem/ReferenceInformation		Optional	**Parent element** of the GL coding package information
../OrderChangeDetail/OrderChangeLineItem/ReferenceInformation@referenceInformationIndicator	“OperatorGeneralLedgerCode”	Mandatory	Type of reference data
../OrderChangeDetail/OrderChangeLineItem/ReferenceInformation/ReferenceNumber	String (25)	Mandatory	GL Coding (Major/Minor/Subcode). GL is parsed with the company specific parse format with dot as the delimiter.
../OrderChangeDetail/OrderChangeLineItem/ReferenceInformation		Optional	**Parent element** of the WO package information
../OrderChangeDetail/OrderChangeLineItem/ReferenceInformation@referenceInformationIndicator	“JobNumber”	Mandatory	Type of reference data
../OrderChangeDetail/OrderChangeLineItem/ReferenceInformation/ReferenceNumber	String (25)	Mandatory	WO Number

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Tag	Data type	Usage	Description / Business Rules
../OrderChangeDetail/OrderChangeLineItem/ ReferenceInformation		Optional	**Parent element** of the Jobsite/Activity package information
../OrderChangeDetail/OrderChangeLineItem/ ReferenceInformation @referenceInformationIndicator	“LocationNumber”	Mandatory	Type of reference data
../OrderChangeDetail/OrderChangeLineItem/ ReferenceInformation/ReferenceNumber	String (25)	Mandatory	Activity ID
../OrderChangeDetails/OrderChangeLineItem/ Attachment		Optional	**Parent element** for a package referencing a PO line Item attachment. Please note once an attachment is created, it cannot be updated or deleted.
../OrderChangeDetails/OrderChangeLineItem/ Attachment/AttachmentPurposeCode	“Other”	Mandatory	A code to indicate the purpose of the attachment
../OrderChangeDetails/OrderChangeLineItem/ Attachment/AttachmentTitle	String (100)	Mandatory	Attachment name (currently is not displayed in the UI but eventually maybe).
../OrderChangeDetails/OrderChangeLineItem/ Attachment/AttachmentDescription	String (2000)	Mandatory	Attachment description that will be displayed to the supplier
../OrderChangeDetails/OrderChangeLineItem/ Attachment/AttachmentLocation	String	Mandatory	A cid location identified in the MIME section with the attachment
../OrderChrageDetails/OrderChangeLineItem/ /Comment	String (2000)	Optional	Description of the purchase order line item (not of an ordered product/service)

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Order Change Summary

Tag	Data type	Usage	Business Rules
../OrderChangeSummary		Mandatory	**Parent element** of the purchase order summary package
../OrderChangeSummary/TotalLineItems	Integer	Mandatory	Quantity of purchase order lines.

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