

860 Purchase Order Change Request - Buyer Initiated

Functional Group ID=**PC**

Introduction:

This Draft Standard for Trial Use contains the format and establishes the data contents of the Purchase Order Change Request - Buyer Initiated Transaction Set (860) for use within the context of an Electronic Data Interchange (EDI) environment. The transaction set can be used to provide the information required for the customary and established business and industry practice relative to a purchase order change. This transaction can be used: (1) by a buyer to request a change to a previously submitted purchase order or (2) by a buyer to confirm acceptance of a purchase order change initiated by the seller or by mutual agreement of the two parties.

Heading:

| | <u>Pos. No.</u> | <u>Seg. ID</u> | <u>Name</u> | <u>Req. Des.</u> | <u>Max.Use</u> | <u>Loop Repeat</u> | <u>Notes and Comments</u> |
|---|-----------------|----------------|---|------------------|----------------|--------------------|---------------------------|
| M | 010 | ST | Transaction Set Header | M | 1 | | |
| M | 020 | BCH | Beginning Segment for Purchase Order Change | M | 1 | | |
| | 050 | REF | Reference Identification | O | >1 | | |
| M | 110 | CSH | Sales Requirements | M | 1 | | |
| M | 110 | CSH | Sales Requirements | M | 1 | | |
| | 130 | ITD | Terms of Sale/Deferred Terms of Sale | O | 5 | | |
| M | 150 | DTM | Date/Time Reference | M | 3 | | |
| | 240 | TD5 | Carrier Details (Routing Sequence/Transit Time) | O | 12 | | |
| | | | | | | 200 | |
| M | 300 | N1 | Name | M | 1 | | |
| M | 320 | N3 | Address Information | M | 2 | | |
| M | 330 | N4 | Geographic Location | M | >1 | | |
| M | 350 | PER | Administrative Communications Contact | M | >1 | | |

Detail:

| | <u>Pos. No.</u> | <u>Seg. ID</u> | <u>Name</u> | <u>Req. Des.</u> | <u>Max.Use</u> | <u>Loop Repeat</u> | <u>Notes and Comments</u> |
|---|-----------------|----------------|--------------------------|------------------|----------------|--------------------|---------------------------|
| | | | | | | >1 | |
| M | 010 | POC | Line Item Change | M | 1 | | |
| | 040 | CTP | Pricing Information | O | >1 | | |
| | 040 | CTP | Pricing Information | O | >1 | | |
| | | | | | | 1000 | |
| | 050 | PID | Product/Item Description | O | 1 | | |

Summary:

| | <u>Pos. No.</u> | <u>Seg. ID</u> | <u>Name</u> | <u>Req. Des.</u> | <u>Max.Use</u> | <u>Loop Repeat</u> | <u>Notes and Comments</u> |
|---|-----------------|----------------|-------------------------|------------------|----------------|--------------------|---------------------------|
| | | | | | | 1 | |
| | 010 | CTT | Transaction Totals | O | 1 | | n1 |
| M | 030 | SE | Transaction Set Trailer | M | 1 | | |

Transaction Set Notes

1. Number of line items (CTT01) is the accumulation of the number of POC segments. If used, hash total (CTT02) is the sum of the value of quantities ordered (POC03) for each POC segment.

Segment: **ST** Transaction Set Header
Position: 010
Loop:
Level: Heading
Usage: Mandatory
Max Use: 1
Purpose: To indicate the start of a transaction set and to assign a control number

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-------------|-------------|---|-------------------|
| ST01 | 143 | Transaction Set Identifier Code | M ID 3/3 |
| | | Code uniquely identifying a Transaction Set | |
| | | 860 Purchase Order Change Request - Buyer Initiated | |
| ST02 | 329 | Transaction Set Control Number | M AN 4/9 |
| | | Identifying control number that must be unique within the transaction set functional group assigned by the originator for a transaction set | |

Segment: **BCH** Beginning Segment for Purchase Order Change
Position: 020
Loop:
Level: Heading
Usage: Mandatory
Max Use: 1
Purpose: To indicate the beginning of the Purchase Order Change Transaction Set and transmit identifying numbers and dates

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-------------|----------------|--|-------------------|
| <u>Des.</u> | <u>Element</u> | | |
| BCH01 | 353 | Transaction Set Purpose Code | M ID 2/2 |
| | | Code identifying purpose of transaction set | |
| | | If BCH01 = 01, cancel the entire order. | |
| | | If BCH01 = 04, snapshot of complete PO. | |
| | | 01 Cancellation | |
| | | 04 Change | |
| BCH02 | 92 | Purchase Order Type Code | M ID 2/2 |
| | | Code specifying the type of Purchase Order | |
| | | For Release Orders, BEG04 will indicate PO Number from Blanket Order (BK) when BEG02 = RL. | |
| | | Orders that contain a dash (-) and will identify the actual Ship To location. | |
| | | BK Blanket Order (Quantity Firm) | |
| | | CN Consigned Order | |
| | | DS Dropship | |
| | | RL Release or Delivery Order | |
| | | SA An order for goods and services placed against a pre-existing contract or blanket order Stand-alone Order | |
| BCH03 | 324 | Purchase Order Number | M AN 1/22 |
| | | Identifying number for Purchase Order assigned by the orderer/purchaser | |
| BCH04 | 328 | Release Number | O AN 1/30 |
| | | Number identifying a release against a Purchase Order previously placed by the parties involved in the transaction | |
| BCH06 | 373 | Date | M DT 8/8 |
| | | Date expressed as CCYYMMDD | |
| BCH11 | 373 | Date | O DT 8/8 |
| | | Date expressed as CCYYMMDD | |

Segment: **REF** Reference Identification
Position: 050
Loop:
Level: Heading
Usage: Optional
Max Use: >1
Purpose: To specify identifying information

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|--------------|-------------|--|-------------------|
| REF01 | 128 | Reference Identification Qualifier Code qualifying the Reference Identification IA Internal Vendor Number | M ID 2/3 |
| REF02 | 127 | Reference Identification Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier | X AN 1/30 |

Segment: **CSH** Sales Requirements
Position: 110
Loop:
Level: Heading
Usage: Mandatory
Max Use: 1
Purpose: To specify general conditions or requirements of the sale

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-------------|-------------|--|-------------------|
| CSH01 | 563 | Sales Requirement Code | M ID 1/2 |
| | | Code to identify a specific requirement or agreement of sale | |
| | | P4 Do Not Preship | |

Segment: **CSH** Sales Requirements
Position: 110
Loop:
Level: Heading
Usage: Mandatory
Max Use: 1
Purpose: To specify general conditions or requirements of the sale

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-------------|-------------|--|-------------------|
| CSH01 | 563 | Sales Requirement Code | M ID 1/2 |
| | | Code to identify a specific requirement or agreement of sale | |
| | | N No Back Order | |
| | | Y Back Order if Out of Stock | |

Segment: **ITD** Terms of Sale/Deferred Terms of Sale
Position: 130
Loop:
Level: Heading
Usage: Optional
Max Use: 5
Purpose: To specify terms of sale

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-------------|----------------|---|-------------------|
| <u>Des.</u> | <u>Element</u> | | |
| ITD01 | 336 | Terms Type Code Code identifying type of payment terms 01 Basic 02 End of Month (EOM) | O ID 2/2 |
| ITD02 | 333 | Terms Basis Date Code Code identifying the beginning of the terms period 2 Delivery Date 3 Invoice Date | O ID 1/2 |
| ITD03 | 338 | Terms Discount Percent Terms discount percentage, expressed as a percent, available to the purchaser if an invoice is paid on or before the Terms Discount Due Date | O R 1/6 |
| ITD05 | 351 | Terms Discount Days Due Number of days in the terms discount period by which payment is due if terms discount is earned | X N0 1/3 |
| ITD07 | 386 | Terms Net Days Number of days until total invoice amount is due (discount not applicable) | O N0 1/3 |

Segment: **DTM** Date/Time Reference
Position: 150
Loop:
Level: Heading
Usage: Mandatory
Max Use: 3
Purpose: To specify pertinent dates and times

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|--------------|-------------|---|-------------------|
| DTM01 | 374 | Date/Time Qualifier | M ID 3/3 |
| | | Code specifying type of date or time, or both date and time | |
| | | 001 Cancel After | |
| | | 002 Delivery Requested | |
| | | 010 Requested Ship | |
| DTM02 | 373 | Date | M DT 8/8 |
| | | Date expressed as CCYYMMDD | |

Segment: **TD5** Carrier Details (Routing Sequence/Transit Time)
Position: 240
Loop:
Level: Heading
Usage: Optional
Max Use: 12
Purpose: To specify the carrier and sequence of routing and provide transit time information

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-------------|----------------|--|-------------------|
| <u>Des.</u> | <u>Element</u> | | |
| TD501 | 133 | Routing Sequence Code | M ID 1/2 |
| | | Code describing the relationship of a carrier to a specific shipment movement | |
| | | O Origin Carrier (Air, Motor, or Ocean) | |
| TD502 | 66 | Identification Code Qualifier | M ID 1/2 |
| | | Code designating the system/method of code structure used for Identification Code (67) | |
| | | 2 Standard Carrier Alpha Code (SCAC) | |
| | | 92 Assigned by Buyer or Buyer's Agent | |
| TD503 | 67 | Identification Code | M AN 2/80 |
| | | Code identifying a party or other code | |
| TD505 | 387 | Routing | M AN 1/35 |
| | | Free-form description of the routing or requested routing for shipment, or the originating carrier's identity | |
| TD512 | 284 | Service Level Code | X ID 2/2 |
| | | Code indicating the level of transportation service or the billing service offered by the transportation carrier | |
| | | 3D Three Day Service | |
| | | CG Ground | |
| | | ND Next Day Air | |
| | | Delivery during business day hours of next business day | |
| | | SE Second Day | |

Segment: **N1** Name
Position: 300
Loop: N1 Mandatory
Level: Heading
Usage: Mandatory
Max Use: 1
Purpose: To identify a party by type of organization, name, and code
Notes: N103 and N104 will be sent on all orders, except when BEG02 = DS.

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-------------|----------------|---|-------------------|
| <u>Des.</u> | <u>Element</u> | | |
| N101 | 98 | Entity Identifier Code | M ID 2/3 |
| | | Code identifying an organizational entity, a physical location, property or an individual | |
| | | BT Bill-to-Party | |
| | | ST Ship To | |
| N102 | 93 | Name | M AN 1/60 |
| | | Free-form name | |
| N103 | 66 | Identification Code Qualifier | M ID 1/2 |
| | | Code designating the system/method of code structure used for Identification Code (67) | |
| | | 92 Assigned by Buyer or Buyer's Agent | |
| N104 | 67 | Identification Code | M AN 2/80 |
| | | Code identifying a party or other code | |
| | | N104 contains the 4 character Store/Warehouse code. | |

Segment: **N3** Address Information
Position: 320
Loop: N1 Mandatory
Level: Heading
Usage: Mandatory
Max Use: 2
Purpose: To specify the location of the named party

Data Element Summary

| Ref. | Data | Name | Attributes |
|--------------------|-----------------------|---|-------------------|
| <u>Des.</u> | <u>Element</u> | <u>Name</u> | |
| N301 | 166 | Address Information Address information | M AN 1/55 |
| N302 | 166 | Address Information Address information | O AN 1/55 |

Segment: **N4** Geographic Location
Position: 330
Loop: N1 Mandatory
Level: Heading
Usage: Mandatory
Max Use: >1
Purpose: To specify the geographic place of the named party

Data Element Summary

| Ref. | Data | Name | Attributes |
|-------------|----------------|--|-------------------|
| Des. | Element | | |
| N401 | 19 | City Name Free-form text for city name | M AN 2/30 |
| N402 | 156 | State or Province Code Code (Standard State/Province) as defined by appropriate government agency | M ID 2/2 |
| N403 | 116 | Postal Code Code defining international postal zone code excluding punctuation and blanks (zip code for United States) | M ID 3/15 |
| N404 | 26 | Country Code Code identifying the country | O ID 2/3 |

Segment: **PER** Administrative Communications Contact
Position: 350
Loop: N1 Mandatory
Level: Heading
Usage: Mandatory
Max Use: >1
Purpose: To identify a person or office to whom administrative communications should be directed

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-------------|----------------|--|-------------------|
| <u>Des.</u> | <u>Element</u> | | |
| PER01 | 366 | Contact Function Code Code identifying the major duty or responsibility of the person or group named | M ID 2/2 |
| PER02 | 93 | Name Free-form name | O AN 1/60 |
| PER03 | 365 | Communication Number Qualifier Code identifying the type of communication number TE Telephone | X ID 2/2 |
| PER04 | 364 | Communication Number Complete communications number including country or area code when applicable | X AN 1/80 |
| PER05 | 365 | Communication Number Qualifier Code identifying the type of communication number EM Electronic Mail | X ID 2/2 |
| PER06 | 364 | Communication Number Complete communications number including country or area code when applicable | X AN 1/80 |

Segment: **POC** Line Item Change
Position: 010
Loop: POC Mandatory
Level: Detail
Usage: Mandatory
Max Use: 1
Purpose: To specify changes to a line item

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-------------|----------------|--|-------------------|
| <u>Des.</u> | <u>Element</u> | | |
| POC01 | 350 | Assigned Identification Alphanumeric characters assigned for differentiation within a transaction set | M AN 1/20 |
| POC02 | 670 | Change or Response Type Code Code specifying the type of change to the line item AI Add Additional Item(s) DI Delete Item(s) NC Concurrent Item (No Change) PC Price Change QD Quantity Decrease QI Quantity Increase RZ Replace All Values Receiver should replace the corresponding values in the original purchase order with the values contained in the Purchase Order Change Transaction Set | M ID 2/2 |
| POC03 | 330 | Quantity Ordered Quantity ordered | O R 1/15 |
| POC05 | C001 | Composite Unit of Measure To identify a composite unit of measure (See Figures Appendix for examples of use) | X |
| C00101 | 355 | Unit or Basis for Measurement Code Code specifying the units in which a value is being expressed, or manner in which a measurement has been taken CA Case EA Each | M ID 2/2 |
| POC06 | 212 | Unit Price Price per unit of product, service, commodity, etc. | X R 1/17 |
| POC08 | 235 | Product/Service ID Qualifier Code identifying the type/source of the descriptive number used in Product/Service ID (234) UP U.P.C. Consumer Package Code (1-5-5-1) | X ID 2/2 |
| POC09 | 234 | Product/Service ID Identifying number for a product or service | X AN 1/48 |
| POC10 | 235 | Product/Service ID Qualifier Code identifying the type/source of the descriptive number used in Product/Service ID (234) IN Buyer's Item Number | X ID 2/2 |
| POC11 | 234 | Product/Service ID Identifying number for a product or service | X AN 1/48 |
| POC12 | 235 | Product/Service ID Qualifier Code identifying the type/source of the descriptive number used in Product/Service ID (234) VA Vendor's Style Number | X ID 2/2 |

POC13

234

Product/Service ID

X AN 1/48

Identifying number for a product or service

Segment: **CTP** Pricing Information
Position: 040
Loop: POC Mandatory
Level: Detail
Usage: Optional
Max Use: >1
Purpose: To specify pricing information

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|--------------|-------------|---|-------------------|
| CTP02 | 236 | Price Identifier Code | X ID 3/3 |
| | | Code identifying pricing specification | |
| | | MSR Manufacturer's Suggested Retail | |
| | | RES Resale | |
| CTP03 | 212 | Unit Price | X R 1/17 |
| | | Price per unit of product, service, commodity, etc. | |

Segment: **CTP Pricing Information**
Position: 040
Loop: POC Mandatory
Level: Detail
Usage: Optional
Max Use: >1
Purpose: To specify pricing information

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|--------------|-------------|--|-------------------|
| CTP02 | 236 | Price Identifier Code Code identifying pricing specification RES Resale | X ID 3/3 |
| CTP03 | 212 | Unit Price Price per unit of product, service, commodity, etc. | X R 1/17 |

Segment: **PID** Product/Item Description
Position: 050
Loop: PID Optional
Level: Detail
Usage: Optional
Max Use: 1
Purpose: To describe a product or process in coded or free-form format

Data Element Summary

| Ref. | Data | Name | Attributes |
|--------------|----------------|--|-------------------|
| Des. | Element | | |
| PID01 | 349 | Item Description Type Code indicating the format of a description F Free-form | M ID 1/1 |
| PID02 | 750 | Product/Process Characteristic Code Code identifying the general class of a product or process characteristic 08 Product 73 Vendor color description 74 Vendor size description 75 Buyer's Color Description 91 Buyer's Item Size Description | O ID 2/3 |
| PID05 | 352 | Description A free-form description to clarify the related data elements and their content | X AN 1/80 |

Segment: **CTT** Transaction Totals
Position: 010
Loop: CTT Optional
Level: Summary
Usage: Optional
Max Use: 1
Purpose: To transmit a hash total for a specific element in the transaction set

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-------------|-------------|---|-------------------|
| CTT01 | 354 | Number of Line Items | M N0 1/6 |
| | | Total number of line items in the transaction set | |

Segment: **SE** Transaction Set Trailer
Position: 030
Loop:
Level: Summary
Usage: Mandatory
Max Use: 1
Purpose: To indicate the end of the transaction set and provide the count of the transmitted segments (including the beginning (ST) and ending (SE) segments)

Data Element Summary

| <u>Ref.</u> | <u>Data</u> | <u>Name</u> | <u>Attributes</u> |
|-------------|-------------|---|-------------------|
| SE01 | 96 | Number of Included Segments Total number of segments included in a transaction set including ST and SE segments | M N0 1/10 |
| SE02 | 329 | Transaction Set Control Number Identifying control number that must be unique within the transaction set functional group assigned by the originator for a transaction set | M AN 4/9 |