

**ELECTRONICS INDUSTRY DATA EXCHANGE
(EIDX)**

**Implementation Recommendations
for
Change Orders and Acknowledgments**

**Change Order (860) and
Change Order Acknowledgment (865)**

IMPORTANT NOTE

Pre-1999 business models are undergoing recast into Unified Modeling Language (UML) notation, and some restructuring. In addition, we've been adding cross-references to XML standards, such as RosettaNet. **The Downloadable business model documents have *not* been updated. Always refer to the "[Clickable Business Models](#)" for the latest and greatest information.** That area of the website also contains very useful information on newer, internet-based technologies. The changes to the existing models *have not changed the original intent* of the models published here in this table, but are (we hope) improvements to presentation that enhance understanding of the business processes and how to implement them.

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Table Of Contents

Purpose	1
<i>Standards Version</i>	<i>1</i>
Abbreviations Used	1
Section 1 - Recommendations for Usage of 860 Change Order Transaction	3
Purchase Order Number, Ship-To Location and Buying Party	4
NTE and REF/N9 Segments	6
Resending Rejected Transactions	7
Allowable Purchase Order Changes	8
<i>Header Level Changes</i>	<i>8</i>
Contracts	8
<i>Item Level Changes</i>	<i>8</i>
<i>Schedule Level Changes</i>	<i>9</i>
Buyer- and Seller-Initiated Changes / Confirming Changes	10
<i>Buyer- vs. Seller-Initiated Changes</i>	<i>10</i>
<i>Confirming Change Orders</i>	<i>10</i>
Change Order Sequence Number	13
<i>X12: BCH05 CHANGE ORDER SEQUENCE NUMBER</i>	<i>13</i>
Line Item Changes – What to Send	15
Line Item Numbers	16
<i>X12: POC01 ASSIGNED IDENTIFICATION</i>	<i>16</i>
<i>Item Number Length</i>	<i>16</i>
Line Item Change or Response Type	18
<i>X12: POC02 LINE ITEM CHANGE OR RESPONSE TYPE</i>	<i>18</i>
AI - ADD ITEM CODE	18
DI - DELETE ITEM CODE	18
NC - NO CHANGE CODE	18
PRICE/QUANTITY/SCHEDULE CODES	19
Replacing Line Items	20
<i>X12: POC02 LINE ITEM CHANGE OR RESPONSE TYPE (continued)</i>	<i>20</i>
Line Item Data Changes	21
<i>X12: POC03 (DE330) - QUANTITY ORDERED</i>	<i>21</i>
<i>X12: POC04 (DE671) - QUANTITY LEFT TO RECEIVE</i>	<i>21</i>
<i>X12: POC05 (DE355) - UNIT OF MEASUREMENT CODE</i>	<i>21</i>
<i>X12: POC06 (DE212) - UNIT PRICE</i>	<i>21</i>
<i>X12: POC07 (DE639) - BASIS OF UNIT PRICE CODE</i>	<i>21</i>
<i>X12: POC08 (DE235) - PRODUCT/SERVICE ID QUALIFIER</i>	<i>21</i>
<i>X12: POC27 (DE234) - PRODUCT/SERVICE ID</i>	<i>21</i>
Quantity Ordered	21

Quantity Left-to-Receive _____	21
Effect of Schedules on Quantity Ordered and Quantity Left-to-Receive _____	21
Unit of Measure _____	21
Unit Price and Basis of Unit Price _____	22
Product/Service IDs and Qualifiers (pairs of DE235 and DE234) – What to Resend _____	23
<i>Recommendation for Single Occurrence of Part in an Order</i> _____	23
Schedules – What to Send _____	24
<i>ZERO QUANTITIES</i> _____	24
Schedule Changes – Examples _____	26
Schedule Dates and Times _____	28
<i>X12: SCH06 (DE374)-DATE/TIME QUALIFIER</i> _____	28
<i>Section 2 – Recommendations for Use of 860 Change Order Acknowledgment Transaction</i> _____	29
Acknowledgments: When and What to Send _____	30
<i>Schedules Pending</i> _____	30
<i>Closed Items</i> _____	31
Change Order Rejects _____	32
<i>X12: BCA02 ACKNOWLEDGMENT TYPE</i> _____	32
<i>X12: ACK01 LINE ITEM STATUS CODE</i> _____	32
<i>Schedule Level Denials</i> _____	32
Second Transaction/Message _____	34
<i>X12: BCA04 (DE328) RELEASE NUMBER</i> _____	34
<i>X12: BCA05 (DE327)CHANGE ORDER SEQUENCE NUMBER</i> _____	34
<i>X12: BCA11 (DE279) PURCHASE ORDER CHANGE REQUEST DATE</i> _____	34
Items and Schedules Acknowledged _____	35
<i>X12: ACK LINE ITEM ACKNOWLEDGMENT SEGMENT</i> _____	35

ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX) CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS

Purpose

After experience with several trading partners, it was realized that the actual transactions could be coded several ways. The design inconsistencies of buyers purchasing systems may cause different interpretation of change orders in the sellers sales order systems.

The purpose of this document is to make recommendations on the X12 PURCHASE ORDER CHANGE transactions to facilitate implementations. The EIDX guidelines give recommendations on which segments and code lists to use. This document is a supplement providing details which every implementor should consider.

Of course, any implementation is an agreed upon method by trading partners. It is the intent of this document to make interpretation of change orders *for stand alone (discrete) orders* more consistent so every implementation does not have its own set of rules but commonality.

Some of these recommendations may not apply to blanket purchase orders. A separate implementation recommendation document for blanket orders will be written.

STANDARDS VERSION

Data segment and element positions referred to in this document are particular to ASC X12 Version 002002. Users of this document may need to adapt information when applying these recommendations to other standards versions.

Abbreviations Used

ANSI	American National Standards Institute
ASC X12	Accredited Standards Committee X12 (ANSI)
EDI	Electronic Data Interchange
PO	Discrete (Standalone) Purchase Order

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Section 1 - Recommendations for Usage of 860 Change Order Transaction

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Purchase Order Number, Ship-To Location and Buying Party

EIDX recommends transactions with the PURCHASE ORDER NUMBER, SHIP-TO LOCATION and BUYING PARTY at the header level only. That is, *only one* purchase order number, *one* ship-to location, and *one* buying party *per transaction*. The purchase order number is on the beginning segment and the ship-to location and buying party are on N1 segments with appropriate qualifiers. This recommendation applies to all EDI purchasing transactions.

Typically, the purchase order (BEG03) number and ship-to location (N1/ST loop, data element N104) may be the only two components of a key for finding the data in both the purchase order system and the sales orders systems. Purchase order number alone may not be an adequate key because purchase order numbers may not be unique across all customers in the sales order system, especially if the location number scheme is a simple sequential number like 09 or 10. The processing is generally easier if all key components (purchase order number and ship-to location) are found only in the header of the transaction.

The buying party (corporation) (N1/BY loop, data element N104) and the bill-to location (N1/BT loop, data element N104) may be cross-referenced in the seller's system given the ship-to location (N1/ST loop, data element N104) in the transaction. That is, once the buyer's ship-to location code is cross-referenced to the seller's ship-to location code, the corporation and the bill-to addresses may automatically be linked to the buyer and the given purchase order. When this happens, it is not necessary to send the buying party N1 segment or N1 loop (N1/BY loop, data element N104) or bill-to location N1 segment or N1 loop (N1/BT loop, data element N104) in the transaction. Check with your trading partners if the N104 in the N1/BY loop or N104 in the N1/BT loop are necessary. If one of these N1 segments or N1 loops is required by some trading partners, you are likely to send it to all your trading partners.

It should suffice to cross-reference locations by using the codes in the N104 fields. It should not be necessary to send the entire set of N2, N3, and N4 segments with the full addresses.

If there is only one ship-to location associated with the purchase order, it should be sent in the header level.

Though EIDX recommends that a given purchase order have only one ship-to location, trading partners can decide if they can implement the transactions if these data elements are at the detail level, that is, multiple purchase order numbers, ship-to locations or buyer parties within a single EDI purchasing transaction. Key data at the detail level is likely to be more complex for a sales order system; hence, it is not the preferred transaction format.

SEGMENT	N102 QUALIFIER	N104 CODE	RECOMMENDATION
N1	N102='ST'	SHIP-TO location code	Required.
N1	N102='BT'	BILL-TO location code	If needed for Trading Partner

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

N1	N102='BY'	BUYING PARTY code	If needed for Trading Partner
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Return to

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

NTE and REF/N9 Segments

It is desirable to codify all data in specific data fields. Data in the NTE (note) segment *requires a person to review and respond to the information* to review the actual data. The notes are always different from each customer, e.g. 'CONTRACT IS 65476 AND DELIVERY QUOTE IS AB5434 ', 'PROMISE DELIVERY = AB5434'. Typically, systems cannot automatically interrogate the note looking for specific items like contract number or delivery quote number.

Often NTE segments contain various authorization numbers in free form text format. If the type of data found in NTE segments are common business fields, they should be defined in explicit data fields in the purchasing system in the long-term. This allows REF or N9 segments to be used. Use of REF or N9 segments reduces the chance of important data being overlooked which could have been free-form text in NTE segments.

Either REF and N9 segments can be used since they use the same qualifiers. N9 allows 1000 occurrences in the loop while REF allows 12 occurrences. It may be necessary to use N9, if there are a large number of references to be conveyed.

The following common data should be mapped to REF or N9 segments and they should not be sent in NTE segments:

REF or N9 QUALIFIER	DATA
CJ	Clause number
DQ	Delivery Quote Number
GC	Government Contract Number
GP	Government Priority Number
PH	Priority Rating
PR	Price Quote Number

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Resending Rejected Transactions

The original transaction could be resent under the following conditions:

The transactions are rejected in the receiver's EDI translator.

Receiver does not correct the transaction or data map so the transaction is accepted by the translator.

The receiver's business application system has not processed the given document, i.e., the transaction was not passed to the business application system.

If the original transaction is rejected by the business application system, then regular system procedures for error correction are employed. The transaction should not be resent since the transaction is now in the business application system.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Allowable Purchase Order Changes

HEADER LEVEL CHANGES

HEADER level changes are not recommended except for a full purchase order (PO) cancellation. Entire PO cancellations are allowed.

Important header level data fields include the purchase order number, ship-to location and buying party. Any change to these key data fields should be handled externally of the EDI process.

Since purchase order numbers may not be unique across the supplier's customers, the customer ship-to location is often included in the matching process in the seller's system. A change in a ship-to location in the purchase order system may cause some matching problems for the purchase order in the sales order system.

Generally EDI change orders are recommended only for item and schedule level changes. This has been the EIDX position historically.

Shipping method or instruction changes usually occur to expedite shipments. They can be handled by the EDI process, but check with your trading partner's systems capability to recognize the changes. The transaction may contain the change in the shipping method or instructions. However, the data in the change order must be compared to current data in the sales order to determine a change. There is no code in the transaction to indicate that this type of change is present.

It is better to handle these changes externally of the EDI process if all your trading partners cannot process them. The buyer also has the risk that shipping method changes and instructions arrive too late, i.e., the order has already shipped or the order is in the process of being shipped. The timing is very important.

Contracts

Contract numbers have the following considerations:

New contract prices usually do not apply to existing orders; hence a change order is not applicable. Wrong contract number was sent on the purchase order *but the correct prices were sent* should be handled outside of the EDI process.

Wrong contract number was sent on the purchase order *and wrong prices were sent*, should be handled as a purchase order cancellation and a new purchase order issued since all the prices may change.

ITEM LEVEL CHANGES

All ITEM level changes for established line items are allowed except part substitutions and revision changes.

Adding and deleting line items are allowed. Quantity and price changes are allowed.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Part substitutions (including just adding or changing a revision number) are accommodated by sending two POC segments.

The first POC segment is a 'delete item' (set POC02 to DI) for the current product line item.

The second POC is an 'add item' (set POC02 to AI) to add the modified product line item.

The POC with the 'add item' should have a *new line item number* (set POC01 to a new line item number).

Reusing the original line item number may cause a problem in the sales order system, if it uses the line item number as a key to find the record. Typically, the line item number is part of the key.

Part revision changes are considered total part substitutions. They should be coded like part substitutions stated above.

Only line items, which are additions, deletions, or changes to the order are sent in the transaction.

SCHEDULE LEVEL CHANGES

All SCHEDULE level changes are allowed.

Quantity and date changes are allowed. The majority of 860 transaction changes are for these types of changes.

Caveat

Check with your trading partner about their system limitations, e.g., cannot process price changes via EDI. The EIDX recommendations may require system changes which are their long term goals.

Split Schedules

Buyer's Purchasing system must be able to process split schedules from suppliers. There will likely be times when the supplier cannot ship the total requested quantity on the requested schedule date. They may need to 'split' the quantity across several schedule dates.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Buyer- and Seller-Initiated Changes / Confirming Changes

BUYER- VS. SELLER-INITIATED CHANGES

Sellers should set the Transaction Set Purpose Code (BCA01) to '00' in the 865 transaction when acknowledging *buyer initiated* changes.

Sellers should set the Transaction Set Purpose Code (BCA01) to '19' in the 865 transaction when acknowledging *seller initiated* changes. If the seller initiated changes conveyed in the acknowledgment 865 transaction are unacceptable to the buyer, an 860 transaction can be sent to request another set of dates. If needed, further communications with the seller outside of the EDI process may be necessary.

Both buyer and seller initiated changes in any 865 transaction should be processed the similarly by the buyer's system. The major purpose of acknowledgments is to convey the scheduled ship or delivery date. Supplier schedule dates are already established in the sales order system as noted in the 865 transaction.

CONFIRMING CHANGE ORDERS

If the buyer sends a *confirming* change orders, it will impact only the customer request date. A new change order is needed in order to impact the supplier schedule dates.

The accuracy of the customer request date is helpful, if the supplier is monitoring their delivery performance to customer request date. The buyer will determine their own delivery performance rating based on the dates in the purchasing system.

Usually, it is *not necessary for the buyer to send a follow up 860* transaction with Purchase Order Type Code (BCH02) equal to 'CF' (confirm) to confirm acceptance of date and quantity deviations from their request in the 860 transaction. A confirming change order 860 transaction just contains all the seller's schedule dates which were already sent in the 865 transaction and exist in the supplier system.

However, if the buyer sends a 'confirming change order', i.e., BCA01 set to '06', it should be interpreted as the following. (For discussion, call the buyer requested schedule date the Customer Request Date (CRD), and call the supplier schedule date the Current Schedule Date (CSD).)

- The buyer's confirming order change is *acknowledging acceptance* of the supplier's CSD.
- The confirming change order authorizes the supplier to reset the 'customer request date' to be equal to the 'supplier schedule date' (CSD=CRD) in the sales order.
- Resetting the 'customer request date' has a disadvantage. If the supplier had the opportunity to pull-in the CSD, which could have met the original CRD, they may not pull-in the CSD. Since the CRD was reset to the CSD in the sales order, the supplier may have lost visibility to the original CRD.

It is unlikely that confirming change order 860 transactions will initiate 865 transactions since the supplier is likely to change only the buyer request date, which has no impact on the sellers schedule dates.

ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS

If the 865 transaction has the Acknowledgment Type Code (BCA02) set to 'No Acknowledgment Needed' (NA), then the seller does not expect a confirming change order 860 transaction. They have no need to update the CRD conveyed in a confirming change order.

The following table illustrates and summarizes the results of transactions (for discussion, call the buyer requested schedule date the Customer Request Date (CRD), and call the supplier schedule date the Current Schedule Date (CSD). The dates are both delivery dates or both ship dates):

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

TRANSACTION or ACTION	CRD (Buyer's)	CSD (Seller)	COMMENTS
BUYER generated 860 to change a schedule	4/30/95 (SCH segment)	N/A	Buyer <i>requests</i> a schedule set to 4/30/95.
SELLER generated 865 to acknowledge a seller schedule date	4/30/95 (optional DTM or SCH segment)	5/15/95 (ACK segment)	Seller could not meet the 4/30/95 date, but can schedule 5/15/95 for shipping or delivery. 5/15/95 is established in the sales order.
BUYER generated 860 CONFIRMING CHANGE ORDER	5/15/95 (SCH segment)		Buyer wants to inform the seller that the 5/15/95 CSD is acceptable. Seller can set the CRD to 5/15/95; CSD is unchanged because the 5/15/95 CSD was returned by the seller. Seller's system may need to accept CRD changes without impacting the CSD (which is not changing) into their change order process but bypass rescheduling and approval of CSD.
SELLER generated FOLLOW UP 865 UNLIKELY	5/15/95 (optional DTM or SCH segment)	5/15/95 (ACK segment)	Seller's CSD is not changed; there is no new seller schedule date to return in the ACK segment. Seller's system would have to recognize CRD changes with no CSD changes to generate a follow up 865 transaction. This is unlikely.
OPPORTUNITY TO PULL-IN CSD LOST			Seller had the opportunity to pull-in the schedule date to 4/30, but the supplier may not do so because the CRD is set to 5/15/95. The 4/30/95 CRD date may not be known to the buyer anymore since the CRD was set to 5/15/95.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Change Order Sequence Number

X12: BCH05 CHANGE ORDER SEQUENCE NUMBER

The Change Order Sequence number is an important field to many buyers. It is often part of the key along with the purchase order number when matching the sent 860 change order transaction to the received 865 change order acknowledgment transaction. DE327 Change Order Sequence Number (BCH05, BCA05) should have the same value.

It is important to note that this field exists *only at the purchase order header level* in the X12 transaction. It should be incremented only once for each 860 purchase order change generated regardless of the number of line item changes included. Each line item does not have its own change order sequence number.

Since changes in subsequent change orders issued may supersede changes in the earlier change order, sellers should review the requested change order data in the order of the changes indicated by the Change Sequence number, i.e., 860 with Change Sequence number 02 should be applied before 860 with Change Sequence number 03 if they are for the same line item. Queued 860 transactions for the same purchase order, but different line items, have no effect on each other except possibly the Change Sequence number returned on the resulting 865 transactions. If change orders for the same purchase order arrive in a short time, it is best to review all of them carefully to see if they impact each other.

The *buyer* should increment the change sequence number for every 860 issued. If suppliers monitor the change sequence number, there is a reduced risk that the change orders are applied in the wrong order. The *supplier* should try to maintain integrity of this data element on 865 acknowledgments so the buyer can match the received 865 transactions to the sent 860 transactions.

There are potential problems in maintaining this data's integrity in the *supplier's system*, which the buyer should be aware of. The accuracy may be easy to maintain if multiple PO changes do not arrive before previous change order has an 865 transaction generated. There may be problems with multiple PO changes outstanding.

The supplier's system is likely to have only *one field* in their data base at the PO header level to hold the change sequence number. If multiple change orders are issued in a short time before previous change orders can be acknowledged by 865 transactions, the acknowledgments may not have accurate change order sequence numbers.

The supplier's system is likely to copy the change order sequence number as each new change order arrives without regard to previous change orders which have not yet had 865 acknowledges generated.

Often change orders requests are entered quickly into a supplier's change order system, but there may be pending approvals by another person. When this happens, the multiple change orders may be queued within a short time before any PO change acknowledgment is sent. *The highest number (assuming the latest number sent in BCH05 in an 860) will most likely be the number returned on all the change acknowledgments which had arrived in that short time.*

**ELECTRONICS INDUSTRY DATA EXCHANGE (EDIX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

If change orders are arriving so frequently that the Change Sequence number becomes a problem, the trading partners should review the situation and take corrective action outside of the EDI process.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Line Item Changes – What to Send

ONLY line items and/or associated schedules, which have changes, should have POC segments and associated SCH segments sent. See section SCHEDULES: WHICH TO SEND for details on associated schedules.

If a line item or its schedules do not have changes, DO NOT SEND THE POC loop of segments. THIS IS VERY IMPORTANT.

See also “Allowable Purchase Order Changes” (above) “Line Item Change or Response Type” (below).
Return to

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Line Item Numbers

X12: POC01 ASSIGNED IDENTIFICATION

It is *very important* that the *line item number not be changed* from the original ASSIGNED ID in the PO101 in the 850 purchase order transaction. Line item number is likely to be a key value used to match the change order line item of the purchase order in the buyer's system to the sales order in the supplier's system. If a purchasing system should renumber line items, because line items are deleted or closed, *it may be difficult to match the line items in the seller's system*. Also since part numbers are often repeated on line items within a given purchase order, the part number alone may not suffice for the line item matching. **NEVER RENUMBER LINE ITEM NUMBERS**. This practice should be corrected as soon as possible to avoid this serious problem.

Likewise, the integrity of the PO101 in the 850 purchase order should continue in the PO101 in the 855 original acknowledgment transaction and the POC01 in the 865 PO change acknowledgment transaction, which are returned to the buyer.

ITEM NUMBER LENGTH

Higher versions/releases of X12 have increased ASSIGNED IDENTIFICATION from a maximum of six characters to a maximum of eleven characters. EIDX recommends the continued use of a maximum of six characters to accommodate the more realistic length of a line item number in the Electronics Industry to avoid system constraints.

Actual Data Length

The data length of the line item number is any length from one to six characters *as defined by the X12 standard. It is not defined as a numeric field*. The purchase order system could generate 1, 01, 001, 0001, 00001, or 000001. Unfortunately, systems do not equate 1, 01, 001, 0001, 00001, 000001 without data manipulation because there is positional comparison.

The supplier's system should maintain the integrity of the data without padding the number with leading zeros so the acknowledgments return the data exactly as sent by the supplier. The actual POC01 and PO101 data length in all the purchase order transactions (850, 855, 860, and 865) should equal each other.

The following table illustrates the problem for non-technical readers. Assume that the supplier system must hold six positions to accommodate all their customers. They store the number exactly as the buyer sent the data. When the computer want to compare the entire field of 6 positions, it compare each position separately.

For example, '1' is really 'one, blank, blank, blank, blank, blank', and '001' is really 'zero, zero, one, blank, blank, blank'.

Hence 'one blank blank blank blank blank' does not equal 'zero zero one blank blank blank'.

DATA	Byte 1	Byte 2	Byte 3	Byte 4	Byte 5	Byte 6
1	1	blank	blank	blank	blank	blank
01	0	1	blank	blank	blank	blank

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

001	0	0	1	blank	blank	blank
0001	0	0	0	1	blank	blank
00001	0	0	0	0	1	blank
000001	0	0	0	0	0	1

Return to

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Line Item Change or Response Type
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X12: POC02 LINE ITEM CHANGE OR RESPONSE TYPE

LINE ITEM CHANGE OR RESPONSE TYPE code is sent at the line item level but it conveys information at *both the item level and the schedule level*. THIS DATA ELEMENT MUST BE AS ACCURATE AS POSSIBLE.

AI - ADD ITEM CODE

An 'ADD ITEM' (AI) code may arrive due to a pure line item to be added to the order, or it may be portion of a part replacement where an 'ADD ITEM' for the new part and a 'DELETE ITEM' for the original part are both sent.

Sometimes a seller may require a new purchase order for parts instead of adding line items to existing purchase orders. This may happen when an order was closed or previously deleted.

An acknowledgment for 'add item' may be returned as an 855 or 865 transaction. This is unpredictable. Since the line item has never been acknowledged, an 855 may be generated though the change occurred due to an 860 transaction. The receipt of 855 and 865 acknowledgments may be treated the same by the buyer's system to avoid complications.

DI - DELETE ITEM CODE

'Delete Item' (DI) should be taken very literally. The supplier should not have to review the other data on the line item or its schedules to determine the validity of the request to delete a line item.

If a line item is a Delete Item, schedule (SCH) segments need not be sent at all. The supplier will review the outstanding schedules in the sales orders and act accordingly to any business agreement. If SCH segments are sent, it is recommended that each schedule quantity (schedule level) be set to zero to avoid any confusion. The quantity remaining to be received (item level) should always be set to zero.

The code DI should remain the important indicator to delete the item regardless of the schedule data sent.

NOTE: Since an 860 transaction is just a *request for a change order*, the delete item may be denied based on business agreements or contracts. For example, a schedule may not be deleted or changed within 30 days of the scheduled date.

NC - NO CHANGE CODE

NC should not be used. If a POC loop is sent, there *must* be a change at the item or schedule level. If a line item or its schedules do not have a change, do not send any portion of the data. If there is no change at the item level but there are changes at the schedule level, then use the appropriate schedule level change code listed below on the POC segment.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

PRICE/QUANTITY/SCHEDULE CODES

The exact type of a schedule change may not be determined by the buyer's system for the EDI process in the short term, but they know there is *some change* at the schedule level. The buyer should make some effort in the long term to make this code (POC02) accurate. These changes include the following codes:

Code	Meaning
MU	(Multiple) for Unit Price, Quantity, Reschedule Change; If the exact code cannot be determined, use code MU as a general code for any change.
QD	Quantity Decrease
QI	Quantity Increase
PC	Price Change
PQ	Unit Price/Quantity Change
PR	Unit Price/Reschedule Change
RQ	Reschedule/Quantity Change
RS	Reschedule

Return to

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Replacing Line Items

X12: POC02 LINE ITEM CHANGE OR RESPONSE TYPE (CONTINUED)

Replace Items

There are a few feasible methods to indicate a line item replacement. *Methods 1-3 are acceptable, but method 3 is preferred:*

METHO D	FIRST ACTION	SECOND ACTION
1	Delete Entire PO (if appropriate)	Issue NEW PO with the replacement part
2	Delete Item (DI) in POC02 in existing order	Issue NEW PO with the replacement part
3	Delete Item (DI) in POC02 in existing order	Add Item (AI), <i>using a new line item number</i>

*The following methods are **not** recommended:*

METHO D	FIRST ACTION	SECOND ACTION
4	Delete Item (DI) in POC02	Add Item (AI), <i>reusing the line item number</i>
5	Use Replacement Item (RE) or Replacement Item with Modifications (RM) in POC02 (This may cause a delete and add in the supplier's system)	(No second action required)

Note that the difference between method 3 and method 4 is which line item number is used. Line item numbers should never be reused since they are often a key matching field between the purchasing systems and the sales order system.

EIDX recommends using method 1, method 2, or method 3 for item replacements. Method 3 is the preferred method.

Methods 4 and method 5 are not recommended. These methods are likely to cause a lot of confusion with the existing line item.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Line Item Data Changes

X12: POC03 (DE330) - QUANTITY ORDERED
X12: POC04 (DE671) - QUANTITY LEFT TO RECEIVE
X12: POC05 (DE355) - UNIT OF MEASUREMENT CODE
X12: POC06 (DE212) - UNIT PRICE
X12: POC07 (DE639) - BASIS OF UNIT PRICE CODE
X12: POC08 (DE235) - PRODUCT/SERVICE ID QUALIFIER
X12: POC27 (DE234) - PRODUCT/SERVICE ID

Quantity Ordered

POC03 should be the line item quantity ordered *including the current line item change*. Suppliers can compare the current sales order's Quantity Ordered to the change order's Quantity Ordered to determine a difference and act accordingly.

If all open and closed schedules are sent, the sum of the quantities on the SCH segment (SCH01) should equal the QUANTITY ORDERED (POC03) at the item level.

If only open schedules are sent, the sum of the quantities on the SCH segment (SCH01) should equal the QUANTITY LEFT TO RECEIVE (POC04) at the item level.

Quantity Left-to-Receive

This data should be the Quantity Left to Receive *including the current line item change*. Suppliers will also compare this number to the current number in their system. Some of the differences may be attributed to in-transit shipments. Implementation of the Advanced Ship Notice (856) should help keep the systems in synchronization.

Effect of Schedules on Quantity Ordered and Quantity Left-to-Receive

If all open and closed schedules are sent in the 860 transaction, then the sum of the quantities on the SCH segment (SCH01) should equal the total QUANTITY ORDERED (POC03) at the item level.

If only all open schedules are sent in the 860 transaction, then the sum of the quantities on the SCH segment (SCH01) should equal the QUANTITY LEFT TO RECEIVE (POC04) at the item level.

If a schedule had a quantity decrease resulting in the total line item having a quantity decrease, the QUANTITY ORDERED (POC03) and the QUANTITY LEFT TO RECEIVE (POC04) on the item level should be decreased by the appropriate amount.

Unit of Measure

Unit of Measure Code should always indicate a single unit, e.g., EA for each.

Many suppliers cannot handle changes to this field on an 860 transaction. The buyer should check with the supplier before sending a change in this field.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Unit Price and Basis of Unit Price

Unit Price is an allowable change. Use the appropriate basis of the unit price code. If there is a contract associated with the purchase order, the price is guided by the contract.

ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS

Product/Service IDs and Qualifiers (pairs of DE235 and DE234) – What to Resend

It is necessary to resend the *vendor part and/or buyer part and associated Engineering Changes (revisions) for the buyer part* as they were sent in the original purchase order. This data is critical to match the part on the seller's current sales order and the buyer's new change order.

There is no need to resend other part information, such as drawing number, in the change order, which was on the original order, unless it is required by a trading partner *or it is the actual change*. Miscellaneous part data is usually defined in the supplier's system given the vendor part or buyer part (plus associated engineering change)

Packaging data should be sent only if it is being changed or it is critical for the trading partner. Sometimes a change in packaging means a change in the part number. When this is the case, the new part number is recognized as any other part number change.

Resending the *secondary* packaging data is recommended only if it is critical between trading partners.

RECOMMENDATION FOR SINGLE OCCURRENCE OF PART IN AN ORDER

It is recommended that the purchase order have a given part number only on one line item in the order.

If the part number must be repeated in a purchase order, the entire set of schedules for the given part are split between the line items. This may complicate the seller's processing of the orders and reviewing the schedules in their entirety.

Likewise, when the seller splits line items in the sales order and they do not maintain the integrity of the original line item number, the buyer's system may have problems matching the acknowledgments to their data.

If there is a business reason for repeating the same part on multiple line items within a given purchase order, then considerations should be given to splitting them into separate purchase orders.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Schedules – What to Send

Since the 860 transaction does not have the structure to convey both the current schedule and the changed schedule (the before and after schedule change snapshot), it is necessary to send a set of schedules, even if only one schedule changes. If just the changed schedules were sent, the supplier would not know which schedules to match and change in the sales order system. It is recommended that **ALL OPEN AND CLOSED SCHEDULES OR JUST ALL OPEN SCHEDULES** in the purchase order be transmitted in the 860 transaction.

If a supplier does not need schedule records for schedule dates *which were shipped*, they can just skip those records in their processing. It is difficult to customize purchasing systems to send all schedules to some trading partners and only open schedules to other trading partners. It is simpler for the supplier to skip or ignore schedule segments with dates which were already shipped.

There is no method to code specific *schedule level denials* in the X12 865 transaction. The supplier will assign their best possible delivery or ship date to the customer request date. A code will not be returned to indicate that the customer date was 'rejected'; however, the schedule could be returned with a zero quantity to convey no shipment to be scheduled if the product truly is not available.

If the seller makes any kind of sales order alteration due to the 860 change order transaction, an 865 transaction should be generated with the exception of confirming change orders. (See separate section on Confirming Change Orders.) The change may not be exactly the change requested in that change order, but the dates are the 'best dates' the seller can do at that time. If the buyer is not content with the returned dates, then subsequent 860 transactions or phone calls may be necessary.

The 860 schedules should be in *chronological* customer request date order. Intermixed dates may cause confusion during the matching process when the 860 is received. (This recommendation may not apply to the dates in ACK segments on the returned purchase order change (865) acknowledgment.)

ZERO QUANTITIES

It is not necessary to send an existing schedule with a zero quantity in order to delete the given schedule *if the quantity is moved to another schedule*. The buyer's system may lose visibility to a schedule once it is deleted; hence, they may not be able to send it in an 860 transaction.

It is necessary to send an existing schedule with a zero quantity in order to delete the given schedule *if the quantity is not moved to another schedule*. The following table illustrates that sending the previous dates with zero quantities would have the same effect if the zero quantity schedules were sent; however, the zero quantity schedules are not necessary.

PREVIOUS SCHEDULES		CURRENT SCHEDULES, ZERO FORECASTS NOT SENT		CURRENT SCHEDULES, ZERO FORECAST SENT	
01/01/95	100	03/01/95	100	01/01/95	0

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

<i>01/15/95</i>	<i>100</i>	<i>03/15/95</i>	<i>100</i>	<i>01/15/95</i>	<i>0</i>
<i>02/01/95</i>	<i>100</i>	<i>04/01/95</i>	<i>100</i>	<i>02/01/95</i>	<i>0</i>
				<i>03/01/95</i>	<i>100</i>
				<i>03/15/95</i>	<i>100</i>
				<i>04/01/95</i>	<i>100</i>
<i>Total Qty</i>	<i>300</i>	<i>Total Qty</i>	<i>300</i>	<i>Total Qty</i>	<i>300</i>

Return to

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Schedule Changes – Examples

HEADER LEVEL:

This change order 860 transaction was issued on Feb. 25.

ITEM LEVEL:

Whether all open and closed schedules are sent or just open schedules are sent, the POC is the same:

POC*001*MU*4500*3500*EA*100.50*CT*BP*PAL5436-44

Meaning:

- Line item 001 is being changed.
- The request is for multiple changes (MU).
- The CURRENT total order quantity is 4500 units.
- (The *original* total order quantity was 5500 units*, but 1000 units are deleted now.)
- The quantity left to receive is 3500 units.
- The contract cost (CT) is \$100.50 (local currency US dollars assumed)
- The product has buyer part (BP) number PAL5436-44.

* The original 850 transaction or subsequent 860 transactions resulted in the sales order showing 5500 units currently on the sales order.

SCHEDULE LEVEL:

If all open and closed schedules are sent, then schedules (A) through (E) are sent. If only open schedules are sent, then schedules (C) through (E) are sent.

(*) The buyer does not send schedules for 03/31/95, 04/10/95, nor 05/31/95 in the 860 transaction.

(#) Of the original 3000 units from 03/31/95 through 05/31/95, 2000 units appear with the date of 04/15/95. *Since the original order quantity was 5500 units and the new Order quantity (POC03) is 4500 units, the remaining quantity of 1000 units is implied to be a deleted quantity. The 500 shipped is not part of the 1000 difference. The 4500 units are the TOTAL ORDER QUANTITY; The 4000 is the TOTAL QUANTITY REMAINING TO RECEIVE in this case. The 500 difference was already received by the buyer.*

ORIGINAL SCHEDULES (850)		ORIGINAL ACK. (855)		SHIPMENT RECEIVED		CHANGE ORDER 'SCH' DATA (860)			NOTE
DATE	QTY	DATE	QTY	DATE	QTY	DATE	QTY		
01/31/95	500	01/31/95	250	01/31/95	250	01/31/95	250	(A)	Already received
		02/15/95	250	02/15/95	250	02/15/95	250	(B)	Already received
02/31/95	1000	02/31/95	1000			02/31/95	1000	(C)	Unchanged
03/31/95	1000	03/31/95	500						03/31/95 NOT sent in 860; quantity canceled or shifted
		04/10/95	500						04/10/95 NOT sent in 860; quantity canceled or shifted

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

						04/15/95	2000	(D)	NEW DATE 04/15/95sent; quantities from 03/3195 and 04/31/95 shifted here
04/31/95	1000	04/31/95	1000						04/31/95 NOT sent; quantity shifted to 04/15/95
05/31/95	1000	05/31/95	1000						05/31/95 NOT sent in 860; quantity shifted to 04/15/95
06/31/94	1000	06/31/95	1000			06/31/95	1000	(E)	Unchanged
Order Qty	5500		5500				4500		
Left-to Receive	5500		5500				4000		

Return to

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Schedule Dates and Times

X12: SCH06 (DE374)-DATE/TIME QUALIFIER

EIDX recommends the following codes as the date qualifier in the schedule segments:

X12 DE374	Meaning
002	Delivery Requested (Dock Date)
010	Requested Ship Date
050	Received
112	Buyer's Dock Date

The ship versus delivery codes must be accurate. Otherwise, the shipment may not arrive on the expected date. If the supplier relies on the wrong code from the buyer, the buyer may expect *delivery* on a day which the supplier is scheduling to *ship* the items. The results will be acceptable only if the transit time indicates same day delivery.

Return to

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

**Section 2 – Recommendations for Use of 860 Change Order Acknowledgment
Transaction**

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Acknowledgments: When and What to Send

As a seller accepts line items in an order and applies shipment dates to the buyer's *requested* schedule dates, 855 transactions are generated to convey the status of each line item and its ship or delivery dates.

Usually only one original acknowledgment (855) transaction should be sent for *any line item* in a purchase order. That means that any purchase order with more than one line item may have multiple 855 transactions associated with the *entire purchase order*. If all the line items are acknowledged all at once, then the entire purchase order will have only one 855 transaction. After a *line item* had one 855 transaction generated for it, *all subsequent acknowledgments* should be 865 transactions for the given line item according to the definition of the 865 transaction.

Since some buyers may identically process all 855 and 865 transactions, they may accept original acknowledgments data and re-acknowledgments data all as 855 transactions. This may happen if they are not concerned about the CHANGE ORDER SEQUENCE NUMBER (BCH05) and they are mostly interested in just getting the current schedule date without the technicality of the 865 transaction. This method can be agreed upon between trading partners.

Purchase order acknowledgments should be sent within one to five days after the original purchase order or change order is sent. One day turn around is usually expected. The acknowledgment turn around is often stated in the trading partner agreement. If the transaction takes longer than the time specified by any agreement, the applications may need a review.

SCHEDULES PENDING

Until the actual ship or delivery dates are determined, the 855 acknowledgment transaction may arrive with ACK01 set to 'schedule pending' (code SP). Most of the seller's schedules may already be determined, which will have the appropriate ACK01 value (see next page). It is better to receive a schedule pending code within one to five days of receipt of the change order, then to defer information any longer in the original acknowledgment.

Schedule segments sent as 'schedule pending' will need subsequent transactions with the actual delivery or ship dates. When the actual date is finally set by the supplier, the entire line item is re-acknowledged, i.e., all the schedules are resent even if only one had an outstanding 'schedule pending'.

The schedule pending code should not be sent in change order acknowledgments. They can be sent in the 855 transaction. The 865 transaction should wait until the new schedule data is determined.

ACK01 (DE668)	MEANING
SP	Item Accepted - Schedule Date Pending

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

CLOSED ITEMS

CLOSED ITEMS, meaning all shipments completed in the past, are never re-acknowledged. Only the original 855 acknowledgment or applicable 865 acknowledgments were sent as schedules were determined.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Change Order Rejects

X12: BCA02 ACKNOWLEDGMENT TYPE

X12: ACK01 LINE ITEM STATUS CODE

Acknowledgment Type

If *all* change order line item requests or the limited header level change requests must be rejected, the Acknowledgment Type (BCA02) may be returned with the code RD, RF, or RJ depending upon the X12 version/release.

BCA02 (DE587)	MEANING
RD	Rejected with Detail - available in X12 versions 003010 and higher; it may be used if necessary by the trading partner agreement.
RF	Reject with Exception Detail Only
RJ	Rejected - No detail; recommended when all the change order line items are rejected. There is no need to send detail for a total rejection.
RO	Rejected with Counter offer. Not recommended by EIDX. Instead use code AC (Acknowledge With Detail and Change).

Line Item Status Code

If a specific change order line item request must be rejected, the Line Item Status Code (ACK01) should be returned with the value 'IR' for 'item rejected'.

ACK01 (DE668)	MEANING
IR	Item Rejected

SCHEDULE LEVEL DENIALS

There is no method to code specific *schedule level denials* in the X12 transaction. The supplier will assign their best possible delivery or ship date to the customer request date. A code will not be returned to indicate that the specific customer date was 'rejected'. One of the following codes may be used to indicate that the exact customer request is not applied to the sales order.

BCA02 (DE587)	MEANING
AC	Acknowledge - With Detail and Change
AE	Acknowledge - With Exception Detail Only

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

ACK01 (DE668)	MEANING
IC	Item Accepted - Changes Made

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Second Transaction/Message

X12: BCA04 (DE328) RELEASE NUMBER

X12: BCA05 (DE327) CHANGE ORDER SEQUENCE NUMBER

X12: BCA11 (DE279) PURCHASE ORDER CHANGE REQUEST DATE

The following data elements have the following considerations. Most data elements on the BCA segment do not need explanations.

BCA04 Release Number

Usually release number is associated with orders based on a material release. Release number (BCA04) is not expected to have data in discrete purchase orders, which this document addresses.

BCA05 Change Order Sequence Number

The Change Order Sequence Number (BCH05) from the 860 Change Order transaction should be returned in the BCA05 in the Change Order Acknowledgment 865 transaction . For details, refer to “*Change Order Sequence Number*” above in the section on the 860 Change Order.

BCA11 Purchase Order Change Request Date

Like the Change Order Sequence Number (DE327), the Purchase Order Change Request Date (DE279) from the Change Order 860 transaction should be returned in the BCA11 data field.. This field may be an important field to match the 865 transaction to the 860 transaction. On a seller initiated change order acknowledgment, the BCA11 should be blank.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Items and Schedules Acknowledged

X12: ACK LINE ITEM ACKNOWLEDGMENT SEGMENT

ACK segments in the 865 transaction are the counter part segments to the SCH segments in the change order 860 transaction. The ACK contains the details of the *supplier's* schedule.

The first time that supplier schedule dates are set, 855 transaction(s) were sent for the line items. As a line item or its associated schedule changes are accepted or the requested change is denied by the sales order system, a change order acknowledgment 865 transaction is generated.

For discussion, when a 'line item' change is mentioned, it means either a change at the line item level and/or a schedule level change associated with the given line item.

The 865 transaction contains only line items which are changed or denied. Whenever a line item or any one of its schedules is changed, all the schedules are returned in an 865 transaction to convey the response to the 860 transaction.

If several line items have changes, all the line items and associated schedules may not be returned in a single 865 transaction. If particular line item changes are delayed by the supplier, perhaps waiting for approval, then the line items may be split into several 865 transactions. However, it is important that every line item found in the 860 transaction have a corresponding acknowledgment in an 865 transaction even it takes several 865 transactions.

Unchanged line items and associated schedules are not re-acknowledged. Also in the short term, suppliers may not be able to provide denied change orders in the acknowledgment.

DTM and SCH segments for Customer Request Date

Optionally, DTM or SCH segments may be returned with the buyer's request dates. One of these segments may be sent based on the trading partner's needs. They are not necessarily sent to all trading partners. Some trading partners do not want or need their own request dates returned.

A DTM segment in the 855 or 865 acknowledgment transaction may be sent with the *buyer's* requested schedule date. A SCH segment in the 855 or 865 acknowledgment transaction may be sent with the *buyer's* requested schedule dates AND the quantity. The dates may be delivery or ship dates.

The date in the DTM or SCH is the most current 'customer request date' in the supplier's system. It should correspond to the customer request date in the 860 transaction if that was the changed schedule. It is not the original or first request date from the 850 transaction. This customer request date in the 865 transaction may be used to match to the SCH in the 860 transaction. When the match is found, the date in the ACK segment may be applied in the purchase order in the buyer's system. These dates may be helpful for matching if schedules are split by the supplier.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

The meaning of the dates in the DTM and SCH segment are the same as noted above. However, the SCH quantities may be confusing if the schedule was split by the supplier. The SCH quantity would be the quantity after the schedule split. If the original request in the 860 transaction was for 10,000 units, but they are split into two groups of 5,000 units, the SCH would reflect the 5,000 units which would not help in the matching process. The buyer's system may be looking for the full 10,000 in the SCH06.

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

Example of ACK and DTM/SCH segments in the 865 transaction:

ACK*IA*1000*EA*017*950308 (required segment)	Where a schedule is acknowledged as Item Accepted (IA) for 1000 units each with an Estimated Delivery Date (017) of March 8, 1995.
DTM*002*950306 (optional segment – use instead of SCH)	Where March 6, 1995 is the buyer’s delivery requested date in the corresponding 860 transaction (for buyer initiated change) or the last customer request date on the sales order (for seller initiated change).
SCH*1000*EA****002*950306 (optional segment – use instead of DTM)	Where March 6, 1995 is the buyer’s delivery requested date and the quantity is 1000 units in the corresponding 860 transaction (for buyer initiated change) or the last customer request date on the sales order (for seller initiated change).

Consistent Qualifiers

Delivery dates are often called ‘dock dates’, i.e., the time that the product arrives on the buyer’s dock. Ship dates are dates when products leave the supplier’s warehouse. The transit time to the buyer’s dock is usually a known constant number of days between the locations. The qualifiers in the ACK and DTM segments should both indicate delivery or both indicate ship dates. Keep the qualifiers consistent.

	ACK Segment	DTM or SCH Segment
DELIVERY DATES:	ACK0 017 Estimated Delivery or 4 ACK0 067 Current Delivery 4	DTM0 002 Delivery Requested 2 or SCH0 002 Delivery Requested 6

	ACK Segment	DTM or SCH Segment
SHIP DATES	ACK0 011 Shipped or 4 ACK0 068 Current Schedule 4 Ship	DTM0 010 Requested Ship or 2 SCH0 037 Do Not Ship Before 6

THE EIDX GUIDELINE RECOMMENDS THE FOLLOWING CODES FOR THE ACK01, LINE ITEM STATUS CODE.

ACK0 1	MEANING	ACK0 1	MEANING
AC	Item accepted and shipped	IH	Item on hold
AR	Item accepted and released for shipment	IP	Item accepted - price changed
DR	Item accepted - date rescheduled	IQ	Item accepted - quantity changed
IA	Item accepted	IR	Item rejected
IC	Item accepted - changes made	IS	Item accepted - substitution made
ID	Item deleted	SP	Item accepted - schedule date pending

**ELECTRONICS INDUSTRY DATA EXCHANGE (EIDX)
CHANGE ORDERS AND ACKNOWLEDGMENTS RECOMMENDATIONS**

When a line item or its schedules are changed, the following codes are expected in the PO change acknowledgment ACK segment. *The LINE ITEM STATUS CODE (ACK01) should be accurate.*

860 CHANGE ORDER	RESULTING ACKNOWLEDGMENT	865 ACK01 (1 per schedule)
<i>CHANGE AT ITEM LEVEL:</i>		
1 DELETED ITEM	Line item is acknowledged when deleted; It is never resent after this 865 is sent.	ID
2 CLOSED ITEM due to a change which caused an immediate shipment	Acknowledge the line item once.	AC
3 CHANGE AN ITEM	Acknowledge only the line items which changed. Send all the schedules for that line item. Sending closed schedules is optional. They probably are not necessary.	Send appropriate code from the above table.
<i>CHANGE AT SCHEDULE LEVEL:</i>		
4 ADD/CHANGE/DELETE A SCHEDULE	Acknowledge the associated line item. Send all the schedules for the line item. Sending closed schedules is optional. They probably are not necessary.	Send appropriate code from the ACK Code table above.