

# **850 Purchase Order**

**X12/V4010/850: 850 Purchase Order**

**Version: 3.3 Final**

**Company: Insight Direct USA, Inc.**  
**Modified: 4/8/2025**

# 850 Purchase Order

Functional Group=**PO**

**Purpose:** This Draft Standard for Trial Use contains the format and establishes the data contents of the Purchase Order Transaction Set (850) for use within the context of an Electronic Data Interchange (EDI) environment. The transaction set can be used to provide for customary and established business and industry practice relative to the placement of purchase orders for goods and services. This transaction set should not be used to convey purchase order changes or purchase order acknowledgment information.

## Heading:

<u>Pos</u>	<u>Id</u>	<u>Segment Name</u>	<u>Req</u>	<u>Max Use</u>	<u>Repeat</u>	<u>Notes</u>	<u>Usage</u>
010	ST	Transaction Set Header	M	1			Must use
020	BEG	Beginning Segment for Purchase Order	M	1			Must use
040	CUR	Currency	M	1			Must use
050	REF	Reference Identification	M	>1			Must use
060	PER	Administrative Communications Contact	M	1			Must use
060	PER	Administrative Communications Contact	O	1			Used
080	FOB	F.O.B. Related Instructions	M	1			Must use
110	CSH	Sales Requirements	O	1			Used
150	DTM	Date/Time Reference	M	1			Must use
240	TD5	Carrier Details (Routing Sequence/Transit Time)	M	1			Must use
<b>LOOP ID - N9</b>					<b>1000</b>		
295	N9	Reference Identification	O	1			Used
300	MSG	Message Text	O	1000			Used
<b>LOOP ID - N1</b>					<b>1</b>		
310	N1	Name	M	1			Must use
320	N2	Additional Name Information	O	2			Used
330	N3	Address Information	M	1			Must use
340	N4	Geographic Location	M	1			Must use
360	PER	Administrative Communications Contact	O	1			Used
<b>LOOP ID - N1</b>					<b>1</b>		
310	N1	Name	M	1			Must use
360	PER	Administrative Communications Contact	M	1			Must use

## Detail:

<u>Pos</u>	<u>Id</u>	<u>Segment Name</u>	<u>Req</u>	<u>Max Use</u>	<u>Repeat</u>	<u>Notes</u>	<u>Usage</u>
<b>LOOP ID - PO1</b>					<b>100000</b>	<b>N2/010L</b>	
010	PO1	Baseline Item Data	M	1		N2/010	Must use
100	REF	Reference Identification	O	>1			Used
110	PER	Administrative Communications Contact	O	1			Used

<u>Pos</u>	<u>Id</u>	<u>Segment Name</u>	<u>Req</u>	<u>Max Use</u>	<u>Repeat</u>	<u>Notes</u>	<u>Usage</u>
210	DTM	Date/Time Reference	O	2			Used
<b>LOOP ID - N1</b>					<b>1</b>		
350	N1	Name	O	1			Used

**Summary:**

<u>Pos</u>	<u>Id</u>	<u>Segment Name</u>	<u>Req</u>	<u>Max Use</u>	<u>Repeat</u>	<u>Notes</u>	<u>Usage</u>
<b>LOOP ID - CTT</b>					<b>1</b>	<b>N3/010L</b>	
010	CTT	Transaction Totals	M	1		N3/010	Must use
030	SE	Transaction Set Trailer	M	1			Must use

# ST Transaction Set Header

Pos: 010	Max: 1
Heading - Mandatory	
Loop: N/A	Elements: 2

**User Option (Usage):** Must use

**Purpose:** To indicate the start of a transaction set and to assign a control number

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
ST01	143	Transaction Set Identifier Code	M	ID	3/3	Must use

**Description:** Code uniquely identifying a Transaction Set

**Code List Summary** (Total Codes: 298, Included: 1)

**Code Name**

850 Purchase Order

ST02	329	Transaction Set Control Number	M	AN	4/9	Must use
------	-----	--------------------------------	---	----	-----	----------

**Description:** Identifying control number that must be unique within the transaction set functional group assigned by the originator for a transaction set

# BEG Beginning Segment for Purchase Order

Pos: 020	Max: 1
Heading - Mandatory	
Loop: N/A	Elements: 6

**User Option (Usage):** Must use

**Purpose:** To indicate the beginning of the Purchase Order Transaction Set and transmit identifying numbers and dates

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
BEG01	353	Transaction Set Purpose Code	M	ID	2/2	Must use
<b>Description:</b> Code identifying purpose of transaction set						
<b>Code List Summary</b> (Total Codes: 65, Included: 1)						
<b>Code Name</b>						
00 Original						
BEG02	92	Purchase Order Type Code	M	ID	2/2	Must use
<b>Description:</b> Code specifying the type of Purchase Order						
<b>Code List Summary</b> (Total Codes: 69, Included: 2)						
<b>Code Name</b>						
DS Dropship						
SA Stand-alone Order						
BEG03	324	Purchase Order Number	M	AN	1/22	Must use
<b>Description:</b> Identifying number for Purchase Order assigned by the orderer/purchaser						
BEG04	328	Release Number	O	AN	1/30	Used
<b>Description:</b> Number identifying a release against a Purchase Order previously placed by the parties involved in the transaction						
BEG05	373	Date	M	DT	8/8	Must use
<b>Description:</b> Date expressed as CCYYMMDD						
<b>Insight Note:</b> <i>This is the date assigned by Insight to the purchase order.</i>						
BEG06	367	Contract Number	O	AN	1/30	Used
<b>Description:</b> Contract number						
<b>Insight Note:</b> <i>Insight Sales Order Number (Drop Ship Orders Only)</i>						

## Example:

BEG\*00\*SA\*123456789\*\*20060418

BEG\*00\*DS\*567891234\*\*20060424\*0007961793

# CUR Currency

<b>Pos: 040</b>	<b>Max: 1</b>
<b>Heading - Mandatory</b>	
<b>Loop: N/A</b>	<b>Elements: 2</b>

**User Option (Usage):** Must use

**Purpose:** To specify the currency (dollars, pounds, francs, etc.) used in a transaction

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
CUR01	98	<b>Entity Identifier Code</b>	M	ID	2/3	Must use

**Description:** Code identifying an organizational entity, a physical location, property or an individual

**Code List Summary** (Total Codes: 1312, Included: 1)

**Code Name**

BY Buying Party (Purchaser)

CUR02	100	<b>Currency Code</b>	M	ID	3/3	Must use
-------	-----	----------------------	---	----	-----	----------

**Description:** Code (Standard ISO) for country in whose currency the charges are specified

### Example:

*CUR\*BY\*USD*

*CUR\*BY\*CAD*

# REF Reference Identification

Pos: 050	Max: >1
Heading - Mandatory	
Loop: N/A	Elements: 2

**User Option (Usage):** Must use

**Purpose:** To specify identifying information

## Element Summary:

Ref	Id	Element Name	Req	Type	Min/Max	Usage
REF01	128	Reference Identification Qualifier	M	ID	2/3	Must use

**Description:** Code qualifying the Reference Identification

**Code List Summary** (Total Codes: 1503, Included: 7)

**Code Name**

12	Billing Account	<b>Insight Note:</b> <i>Insight's shipping account number</i>
AY	Floor Plan Approval Number	
CO	Customer Order Number	<b>Insight Note:</b> <i>Insight Sales Order Number</i>
CR	Customer Reference Number	<b>Insight Note:</b> <i>3rd-Party Billing Number If REF01 = CR, the FOB01 will be "TP"</i>
EU	End User's Purchase Order Number	<b>Insight Note:</b> <i>Customer's PO # on Insight Sales Order</i>
QK	Sales Program Number	
SU	Special Processing Code	<b>Insight Note:</b> <i>Unique code identifying the special handling requirements for the claim</i>

REF02	127	Reference Identification	M	AN	1/30	Must use
-------	-----	--------------------------	---	----	------	----------

**Description:** Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier

<b>Insight Note:</b> <i>When REF01 = QK, the following valid Gov/Ed for the REF02:</i>
<i>PAS - State and Local</i>
<i>PAF - Federal</i>
<i>EDK - K-12</i>
<i>EDH - Higher Education</i>
<i>When REF01 =SU, the following are valid for the REF02.:</i>
<i>ZSAS - Signature Required and Saturday Delivery</i>
<i>ZSIG - Signature Required</i>
<i>ZSAT - Saturday Delivery only</i>
<i>ZSPC - Freight Hold</i>

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
		ZVAS - no Freight Hold				

**Example:**

REF\*12\*123456  
REF\*AY\*F01  
REF\*CO\*0007961793  
REF\*CR\*123456  
REF\*EU\*AY1234  
REF\*QK\*PAS  
REF\*SU\*ZSIG (Signature Required)

# PER Administrative Communications Contact

Pos: 060	Max: 1
Heading - Mandatory	
Loop: N/A	Elements: 6

**User Option (Usage):** Must use

**Purpose:** To identify a person or office to whom administrative communications should be directed

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
PER01	366	<b>Contact Function Code</b>	M	ID	2/2	Must use
<p><b>Description:</b> Code identifying the major duty or responsibility of the person or group named</p> <p><b>Code List Summary</b> (Total Codes: 230, Included: 1)</p> <p><b>Code Name</b> BD Buyer Name or Department</p>						
PER02	93	<b>Name</b>	M	AN	1/60	Must use
<p><b>Description:</b> Free-form name</p>						
PER03	365	<b>Communication Number Qualifier</b>	M	ID	2/2	Must use
<p><b>Description:</b> Code identifying the type of communication number</p> <p><b>Code List Summary</b> (Total Codes: 40, Included: 1)</p> <p><b>Code Name</b> TE Telephone</p>						
PER04	364	<b>Communication Number</b>	M	AN	1/80	Must use
<p><b>Description:</b> Complete communications number including country or area code when applicable</p>						
PER05	365	<b>Communication Number Qualifier</b>	O	ID	2/2	Used
<p><b>Description:</b> Code identifying the type of communication number</p> <p><b>Code List Summary</b> (Total Codes: 40, Included: 1)</p> <p><b>Code Name</b> FX Facsimile</p>						
PER06	364	<b>Communication Number</b>	O	AN	1/80	Used
<p><b>Description:</b> Complete communications number including country or area code when applicable</p>						

## Example:

*PER\*BD\*INSIGHT BUYER NAME\*TE\*800-555-5555\*FX\*630-351-7334*

# PER Administrative Communications Contact

Pos: 060	Max: 1
Heading - Optional	
Loop: N/A	Elements: 6

**User Option (Usage):** Used

**Purpose:** To identify a person or office to whom administrative communications should be directed

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
PER01	366	Contact Function Code	M	ID	2/2	Must use
<p><b>Description:</b> Code identifying the major duty or responsibility of the person or group named</p> <p><b>Code List Summary</b> (Total Codes: 230, Included: 1)</p> <p><u>Code</u> <u>Name</u></p> <p>IC Information Contact</p>						
PER02	93	Name	M	AN	1/60	Must use
<p><b>Description:</b> Free-form name</p>						
PER03	365	Communication Number Qualifier	M	ID	2/2	Must use
<p><b>Description:</b> Code identifying the type of communication number</p> <p><b>Code List Summary</b> (Total Codes: 40, Included: 1)</p> <p><u>Code</u> <u>Name</u></p> <p>TE Telephone</p>						
PER04	364	Communication Number	M	AN	1/80	Must use
<p><b>Description:</b> Complete communications number including country or area code when applicable</p>						
PER05	365	Communication Number Qualifier	M	ID	2/2	Must use
<p><b>Description:</b> Code identifying the type of communication number</p> <p><b>Code List Summary</b> (Total Codes: 40, Included: 1)</p> <p><u>Code</u> <u>Name</u></p> <p>EM Electronic Mail</p>						
PER06	364	Communication Number	M	AN	1/80	Must use
<p><b>Description:</b> Complete communications number including country or area code when applicable</p>						

## Insight Note:

*The order contact data will be provided for dropship order types if captured during the sales order creation.*

## Example:

PER\*IC\*CUSTOMER PO CONTACT\*TE\*800-777-7777\*EM\*CUSTOMERPOCONTACT@CUSTOMER.COM

# FOB F.O.B. Related Instructions

Pos: 080	Max: 1
Heading - Mandatory	
Loop: N/A	Elements: 1

**User Option (Usage):** Must use

**Purpose:** To specify transportation instructions relating to shipment

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
FOB01	146	Shipment Method of Payment	M	ID	2/2	Must use

**Description:** Code identifying payment terms for transportation charges

**Code List Summary** (Total Codes: 28, Included: 2)

<u>Code</u>	<u>Name</u>
DE	Per Contract
TP	Third Party Pay

**Insight Note:**

*If FOB01 = TP, then the 3rd party billing number will appear in the previous REF segment with REF01 = CR.*

## Example:

FOB\*DE

# CSH Sales Requirements

Pos: 110	Max: 1
Heading - Optional	
Loop: N/A	Elements: 1

**User Option (Usage):** Used

**Purpose:** To specify general conditions or requirements of the sale

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
CSH01	563	Sales Requirement Code	M	ID	1/2	Must use

**Description:** Code to identify a specific requirement or agreement of sale

**Code List Summary** (Total Codes: 54, Included: 2)

**Code Name**

BK	Ship Partial - Balance Back Order
SC	Ship Complete

### Example:

*CSH\*BK*

*In this example backorders are allowed. If a partial quantity is available for a line, it should be shipped and the remaining quantity should be backordered.*

*CSH\*SC*

*This is Fill/Kill at the order level. In this example the order must be shipped complete. If the entire order can not be shipped together, then the entire order should be rejected. No backorders are allowed.*

*CSH\*BK*

*CSH\*SC*

*In this example, the order can be backordered but the shipment must be held until all products are available to ship.*

*NO CSH SEGMENT*

*If no CSH segment is sent, then the order is Fill/Kill at the line. If there is not enough product to ship for a particular line, the entire line should be rejected. All other lines with available product should be shipped.*

# DTM Date/Time Reference

Pos: 150	Max: 1
Heading - Mandatory	
Loop: N/A	Elements: 2

**User Option (Usage):** Must use

**Purpose:** To specify pertinent dates and times

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
DTM01	374	Date/Time Qualifier	M	ID	3/3	Must use

**Description:** Code specifying type of date or time, or both date and time

**Code List Summary** (Total Codes: 1112, Included: 1)

<u>Code</u>	<u>Name</u>
002	Delivery Requested

DTM02	373	Date	M	DT	8/8	Must use
-------	-----	------	---	----	-----	----------

**Description:** Date expressed as CCYYMMDD

## Example:

*DTM\*002\*20060501*

# TD5 Carrier Details (Routing Sequence/Transit Time)

Pos: 240	Max: 1
Heading - Mandatory	
Loop: N/A	Elements: 5

**User Option (Usage):** Must use

**Purpose:** To specify the carrier and sequence of routing and provide transit time information

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
TD502	66	Identification Code Qualifier	O	ID	1/2	Used

**Description:** Code designating the system/method of code structure used for Identification Code (67)

**Insight Note:** *This element is not used when TD504 = T (BEST WAY [Shipper Option])*

**Code List Summary** (Total Codes: 215, Included: 1)

**Code Name**

2 Standard Carrier Alpha Code (SCAC)

TD503	67	Identification Code	O	AN	2/80	Used
-------	----	---------------------	---	----	------	------

**Description:** Code identifying a party or other code

**Insight Note:** *This element is not used when TD504 = T (BEST WAY [Shipper Option])*

TD504	91	Transportation Method/Type Code	O	ID	1/2	Used
-------	----	---------------------------------	---	----	-----	------

**Description:** Code specifying the method or type of transportation for the shipment

**Code List Summary** (Total Codes: 71, Included: 1)

**Code Name**

T Best Way (Shippers Option)

TD505	387	Routing	M	AN	1/35	Must use
-------	-----	---------	---	----	------	----------

**Description:** Free-form description of the routing or requested routing for shipment, or the originating carrier's identity

TD512	284	Service Level Code	M	ID	2/2	Must use
-------	-----	--------------------	---	----	-----	----------

**Description:** Code indicating the level of transportation service or the billing service offered by the transportation carrier

**Code List Summary** (Total Codes: 66, Included: 15)

**Code Name**

- 3D Three Day Service
- CG Ground
- CX Express Service
- IX Express Service - Worldwide
- ND Next Day Air
- NM Next Morning
- ON Overnight
- PB Priority Mail
- PI Priority Mail Insured
- SA Same Day
- SC Second Day Air

<u>Code</u>	<u>Name</u>
SD	Saturday
SE	Second Day
SG	Standard Ground
ST	Standard Class

**Insight Note:**

*For a list of carrier service levels that Insight will send, reference the Insight 850 Carrier Service Level Matrix.*

**Example:**

`TD5**2**FDE**FEDEX*****CG`

`TD5****T**BESTWAY (SHIPPER OPTION)*****CG`

# N9 Reference Identification

Pos: 295	Max: 1
Heading - Optional	
Loop: N9	Elements: 2

**User Option (Usage):** Used

**Purpose:** To transmit identifying information as specified by the Reference Identification Qualifier

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
N901	128	Reference Identification Qualifier	M	ID	2/3	Must use

**Description:** Code qualifying the Reference Identification

**Code List Summary** (Total Codes: 1503, Included: 1)

**Code Name**

L1 Letters or Notes

N902	127	Reference Identification	M	AN	1/30	Must use
------	-----	--------------------------	---	----	------	----------

**Description:** Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier

## Example:

*N9\*L1\*MESSAGE TO FOLLOW*

# MSG Message Text

Pos: 300	Max: 1000
Heading - Optional	
Loop: N9	Elements: 1

**User Option (Usage):** Used

**Purpose:** To provide a free-form format that allows the transmission of text information

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
MSG01	933	Free-Form Message Text	M	AN	1/264	Must use

**Description:** Free-form message text

## Example:

*MSG\*PLEASE SHIP ACCORDING TO ROUTING GUIDE*

**N1 Name**

<b>Pos: 310</b>	<b>Max: 1</b>
<b>Heading - Mandatory</b>	
<b>Loop: N1</b>	<b>Elements: 4</b>

**User Option (Usage):** Must use**Purpose:** To identify a party by type of organization, name, and code**Element Summary:**

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
N101	98	<b>Entity Identifier Code</b>	M	ID	2/3	Must use
		<b>Description:</b> Code identifying an organizational entity, a physical location, property or an individual				
		<b>Code List Summary</b> (Total Codes: 1312, Included: 1)				
		<b>Code Name</b>				
		ST		Ship To		
N102	93	<b>Name</b>	M	AN	1/60	Must use
		<b>Description:</b> Free-form name				
N103	66	<b>Identification Code Qualifier</b>	M	ID	1/2	Must use
		<b>Description:</b> Code designating the system/method of code structure used for Identification Code (67)				
		<b>Code List Summary</b> (Total Codes: 215, Included: 1)				
		<b>Code Name</b>				
		92		Assigned by Buyer or Buyer's Agent		
N104	67	<b>Identification Code</b>	M	AN	2/80	Must use
		<b>Description:</b> Code identifying a party or other code				

**Example:**

```
N1*ST*ABC CORP*92*2000234
```

# N2 Additional Name Information

Pos: 320	Max: 2
Heading - Optional	
Loop: N1	Elements: 2

**User Option (Usage):** Used

**Purpose:** To specify additional names or those longer than 35 characters in length

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
N201	93	<b>Name</b>	M	AN	1/60	Must use
		<b>Description:</b> Free-form name				
N202	93	<b>Name</b>	O	AN	1/60	Used
		<b>Description:</b> Free-form name				

## Example:

*N2\*SUITE 2002A*

# N3 Address Information

Pos: 330	Max: 1
Heading - Mandatory	
Loop: N1	Elements: 2

**User Option (Usage):** Must use

**Purpose:** To specify the location of the named party

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
N301	166	<b>Address Information</b>	M	AN	1/55	Must use
		<b>Description:</b> Address information				
N302	166	<b>Address Information</b>	O	AN	1/55	Used
		<b>Description:</b> Address information				

## Example:

*N3\*215 CELEBRATION PLACE*

# N4 Geographic Location

Pos: 340	Max: 1
Heading - Mandatory	
Loop: N1	Elements: 4

**User Option (Usage):** Must use

**Purpose:** To specify the geographic place of the named party

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
N401	19	<b>City Name</b>	M	AN	2/30	Must use
		<b>Description:</b> Free-form text for city name				
N402	156	<b>State or Province Code</b>	M	ID	2/2	Must use
		<b>Description:</b> Code (Standard State/Province) as defined by appropriate government agency				
N403	116	<b>Postal Code</b>	M	ID	3/15	Must use
		<b>Description:</b> Code defining international postal zone code excluding punctuation and blanks (zip code for United States)				
N404	26	<b>Country Code</b>	M	ID	2/3	Must use
		<b>Description:</b> Code identifying the country				

## Example:

*N4\*KISSIMMEE\*FL\*34747\*US*

# PER Administrative Communications Contact

Pos: 360	Max: 1
Heading - Optional	
Loop: N1	Elements: 6

**User Option (Usage):** Used

**Purpose:** To identify a person or office to whom administrative communications should be directed

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
PER01	366	Contact Function Code	M	ID	2/2	Must use
<p><b>Description:</b> Code identifying the major duty or responsibility of the person or group named</p> <p><b>Code List Summary</b> (Total Codes: 230, Included: 1)</p> <p><u>Code</u> <u>Name</u></p> <p>IC Information Contact</p>						
PER02	93	Name	O	AN	1/60	Used
<p><b>Description:</b> Free-form name</p>						
PER03	365	Communication Number Qualifier	O	ID	2/2	Used
<p><b>Description:</b> Code identifying the type of communication number</p> <p><b>Code List Summary</b> (Total Codes: 40, Included: 1)</p> <p><u>Code</u> <u>Name</u></p> <p>TE Telephone</p>						
PER04	364	Communication Number	O	AN	1/80	Used
<p><b>Description:</b> Complete communications number including country or area code when applicable</p>						
PER05	365	Communication Number Qualifier	O	ID	2/2	Used
<p><b>Description:</b> Code identifying the type of communication number</p> <p><b>Code List Summary</b> (Total Codes: 40, Included: 1)</p> <p><u>Code</u> <u>Name</u></p> <p>EM Electronic Mail</p>						
PER06	364	Communication Number	O	AN	1/80	Used
<p><b>Description:</b> Complete communications number including country or area code when applicable</p>						

## Example:

*PER\*IC\*BOB SMITH\*TE\*800-555-5555\*EM\*Bob.Smith@case.com*

# N1 Name

<b>Pos: 310</b>	<b>Max: 1</b>
<b>Heading - Mandatory</b>	
<b>Loop: N1</b>	<b>Elements: 2</b>

**User Option (Usage):** Must use

**Purpose:** To identify a party by type of organization, name, and code

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
N101	98	<b>Entity Identifier Code</b>	M	ID	2/3	Must use

**Description:** Code identifying an organizational entity, a physical location, property or an individual

**Code List Summary** (Total Codes: 1312, Included: 1)

**Code Name**

BT Bill-to-Party

N102	93	<b>Name</b>	M	AN	1/60	Must use
------	----	-------------	---	----	------	----------

**Description:** Free-form name

## Example:

*N1\*BT\*INSIGHT DIRECT USA, INC.*

# PER Administrative Communications Contact

Pos: 360	Max: 1
Heading - Mandatory	
Loop: N1	Elements: 6

**User Option (Usage):** Must use

**Purpose:** To identify a person or office to whom administrative communications should be directed

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
PER01	366	<b>Contact Function Code</b>	M	ID	2/2	Must use
<p><b>Description:</b> Code identifying the major duty or responsibility of the person or group named</p> <p><b>Code List Summary</b> (Total Codes: 230, Included: 1)</p> <p><b>Code Name</b> AP Accounts Payable Department</p>						
PER02	93	<b>Name</b>	M	AN	1/60	Must use
<p><b>Description:</b> Free-form name</p>						
PER03	365	<b>Communication Number Qualifier</b>	M	ID	2/2	Must use
<p><b>Description:</b> Code identifying the type of communication number</p> <p><b>Code List Summary</b> (Total Codes: 40, Included: 1)</p> <p><b>Code Name</b> TE Telephone</p>						
PER04	364	<b>Communication Number</b>	M	AN	1/80	Must use
<p><b>Description:</b> Complete communications number including country or area code when applicable</p>						
PER05	365	<b>Communication Number Qualifier</b>	M	ID	2/2	Must use
<p><b>Description:</b> Code identifying the type of communication number</p> <p><b>Code List Summary</b> (Total Codes: 40, Included: 1)</p> <p><b>Code Name</b> EM Electronic Mail</p>						
PER06	364	<b>Communication Number</b>	M	AN	1/80	Must use
<p><b>Description:</b> Complete communications number including country or area code when applicable</p>						

## Example:

*PER\*AP\*ORDER FLOW TEAM\*TE\*480-333-3000\*EM\*LICENSING@INSIGHT.COM*

# PO1 Baseline Item Data

Pos: 010	Max: 1
Detail - Mandatory	
Loop: PO1	Elements: 9

**User Option (Usage):** Must use

**Purpose:** To specify basic and most frequently used line item data

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
PO101	350	Assigned Identification	M	AN	1/20	Must use

**Description:** Alphanumeric characters assigned for differentiation within a transaction set

**Insight Note:** This is the line item number that must be returned on subsequent documents to Insight such as the 855, 856, 810 and 870.

PO102	330	Quantity Ordered	M	R	1/15	Must use
-------	-----	------------------	---	---	------	----------

**Description:** Quantity ordered

PO103	355	Unit or Basis for Measurement Code	M	ID	2/2	Must use
-------	-----	------------------------------------	---	----	-----	----------

**Description:** Code specifying the units in which a value is being expressed, or manner in which a measurement has been taken

**Code List Summary** (Total Codes: 794, Included: 1)

**Code Name**

EA Each

PO104	212	Unit Price	M	R	1/17	Must use
-------	-----	------------	---	---	------	----------

**Description:** Price per unit of product, service, commodity, etc.

PO105	639	Basis of Unit Price Code	M	ID	2/2	Must use
-------	-----	--------------------------	---	----	-----	----------

**Description:** Code identifying the type of unit price for an item

**Code List Summary** (Total Codes: 91, Included: 1)

**Code Name**

CP Current Price (Subject to Change)

PO106	235	Product/Service ID Qualifier	M	ID	2/2	Must use
-------	-----	------------------------------	---	----	-----	----------

**Description:** Code identifying the type/source of the descriptive number used in Product/Service ID (234)

**Code List Summary** (Total Codes: 477, Included: 1)

**Code Name**

BP Buyer's Part Number

PO107	234	Product/Service ID	M	AN	1/48	Must use
-------	-----	--------------------	---	----	------	----------

**Description:** Identifying number for a product or service

PO108	235	Product/Service ID Qualifier	M	ID	2/2	Must use
-------	-----	------------------------------	---	----	-----	----------

**Description:** Code identifying the type/source of the descriptive number used in Product/Service ID (234)

**Code List Summary** (Total Codes: 477, Included: 1)

**Code Name**

VP Vendor's (Seller's) Part Number

PO109 234 **Product/Service ID** M AN 1/48 Must use

**Description:** Identifying number for a product or service

**Example:**

*PO1\*00010\*1\*EA\*396.01\*CP\*BP\*25R8904\*VP\*25R8904*

# REF Reference Identification

Pos: 100	Max: >1
Detail - Optional	
Loop: PO1	Elements: 3

**User Option (Usage):** Used

**Purpose:** To specify identifying information

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
REF01	128	Reference Identification Qualifier	M	ID	2/3	Must use

**Description:** Code qualifying the Reference Identification

**Code List Summary** (Total Codes: 1503, Included: 11)

**Code Name**

- 11 Account Number
- AH Agreement Number
- BB Authorization Number
- PD Promotion/Deal Number
- PG Product Group
- PR Price Quote Number
- Q1 Quote Number
- S6 Stock Number
- SE Serial Number
- CNO Hold Number
- PLA Product Licensing Agreement Number

REF02	127	Reference Identification	M	AN	1/30	Must use
-------	-----	--------------------------	---	----	------	----------

**Description:** Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier

REF03	352	Description	O	AN	1/80	Used
-------	-----	-------------	---	----	------	------

**Description:** A free-form description to clarify the related data elements and their content

**Insight Note:**

*The Serial numbers will be placed in this element because the max length of a serial number can be up to 50 characters and REF02 only allows for 30 characters*

## Example:

- REF\*11\*Redhat account number
- REF\*BB\*12345AU
- REF\*PLA\*99F99SE
- REF\*AH\*Master Agreement
- REF\*Q1\*Customer Quote
- REF\*SE\*\*Serial Number
- REF\*S6\* Initial Stock Number
- REF\*PG\*Program Code
- REF\*PD\*Deal Registration Number
- REF\*PR\*Price Quote Number (Special Pricing indicator)
- REF\*CNO\*Commitment Number(Hold Number)

# PER Administrative Communications Contact

Pos: 110	Max: 1
Detail - Optional	
Loop: PO1	Elements: 6

**User Option (Usage):** Used

**Purpose:** To identify a person or office to whom administrative communications should be directed

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>				
PER01	366	Contact Function Code	M	ID	2/2	Must use				
<p><b>Description:</b> Code identifying the major duty or responsibility of the person or group named</p> <p><b>Code List Summary</b> (Total Codes: 230, Included: 1)</p> <table border="1"> <thead> <tr> <th><u>Code</u></th> <th><u>Name</u></th> </tr> </thead> <tbody> <tr> <td>FF</td> <td>Licensee</td> </tr> </tbody> </table>							<u>Code</u>	<u>Name</u>	FF	Licensee
<u>Code</u>	<u>Name</u>									
FF	Licensee									
PER02	93	Name	M	AN	1/60	Must use				
<p><b>Description:</b> Free-form name</p>										
PER03	365	Communication Number Qualifier	M	ID	2/2	Must use				
<p><b>Description:</b> Code identifying the type of communication number</p> <p><b>Code List Summary</b> (Total Codes: 40, Included: 1)</p> <table border="1"> <thead> <tr> <th><u>Code</u></th> <th><u>Name</u></th> </tr> </thead> <tbody> <tr> <td>TE</td> <td>Telephone</td> </tr> </tbody> </table>							<u>Code</u>	<u>Name</u>	TE	Telephone
<u>Code</u>	<u>Name</u>									
TE	Telephone									
PER04	364	Communication Number	M	AN	1/80	Must use				
<p><b>Description:</b> Complete communications number including country or area code when applicable</p>										
PER05	365	Communication Number Qualifier	M	ID	2/2	Must use				
<p><b>Description:</b> Code identifying the type of communication number</p> <p><b>Code List Summary</b> (Total Codes: 40, Included: 1)</p> <table border="1"> <thead> <tr> <th><u>Code</u></th> <th><u>Name</u></th> </tr> </thead> <tbody> <tr> <td>EM</td> <td>Electronic Mail</td> </tr> </tbody> </table>							<u>Code</u>	<u>Name</u>	EM	Electronic Mail
<u>Code</u>	<u>Name</u>									
EM	Electronic Mail									
PER06	364	Communication Number	M	AN	1/80	Must use				
<p><b>Description:</b> Complete communications number including country or area code when applicable</p>										

## Insight Note:

*This segment is used for Software License Orders.*

## Example:

*PER\*FF\*JOE SMITH\*TE\*800-444-4444 ext 1234\*EM\*JSMITH@XYZ.COM*

# DTM Date/Time Reference

Pos: 210	Max: 2
Detail - Optional	
Loop: PO1	Elements: 2

**User Option (Usage):** Used

**Purpose:** To specify pertinent dates and times

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
DTM01	374	Date/Time Qualifier	M	ID	3/3	Must use

**Description:** Code specifying type of date or time, or both date and time

**Code List Summary** (Total Codes: 1112, Included: 2)

<u>Code</u>	<u>Name</u>
092	Contract Effective
093	Contract Expiration

DTM02	373	Date	M	DT	8/8	Must use
-------	-----	------	---	----	-----	----------

**Description:** Date expressed as CCYYMMDD

## Example:

*DTM\*092\*01012022*  
*DTM\*093\*12312022*

# N1 Name

<b>Pos: 350</b>	<b>Max: 1</b>
<b>Detail - Optional</b>	
<b>Loop: N1</b>	<b>Elements: 3</b>

**User Option (Usage):** Used

**Purpose:** To identify a party by type of organization, name, and code

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
N101	98	<b>Entity Identifier Code</b>	M	ID	2/3	Must use

**Description:** Code identifying an organizational entity, a physical location, property or an individual

**Code List Summary** (Total Codes: 1312, Included: 1)

**Code Name**

SF Ship From

N103	66	<b>Identification Code Qualifier</b>	M	ID	1/2	Must use
------	----	--------------------------------------	---	----	-----	----------

**Description:** Code designating the system/method of code structure used for Identification Code (67)

**Code List Summary** (Total Codes: 215, Included: 1)

**Code Name**

54 Warehouse

N104	67	<b>Identification Code</b>	M	AN	2/80	Must use
------	----	----------------------------	---	----	------	----------

**Description:** Code identifying a party or other code

## Example:

*This segment is strictly for Canada orders.*

*N1\*SF\*\*54\*10*

# CTT Transaction Totals

Pos: 010	Max: 1
Summary - Mandatory	
Loop: CTT	Elements: 1

**User Option (Usage):** Must use

**Purpose:** To transmit a hash total for a specific element in the transaction set

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
CTT01	354	Number of Line Items	M	N0	1/6	Must use

**Description:** Total number of line items in the transaction set

## Example:

*CTT\*1*

# SE Transaction Set Trailer

Pos: 030	Max: 1
Summary - Mandatory	
Loop: N/A	Elements: 2

**User Option (Usage):** Must use

**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)

## Element Summary:

<u>Ref</u>	<u>Id</u>	<u>Element Name</u>	<u>Req</u>	<u>Type</u>	<u>Min/Max</u>	<u>Usage</u>
SE01	96	<b>Number of Included Segments</b>	M	N0	1/10	Must use
		<b>Description:</b> Total number of segments included in a transaction set including ST and SE segments				
SE02	329	<b>Transaction Set Control Number</b>	M	AN	4/9	Must use
		<b>Description:</b> Identifying control number that must be unique within the transaction set functional group assigned by the originator for a transaction set				