



# OpenTicket Submission Guidelines

August 2022



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## Questions and Contacts

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Open Invoice/Open Ticket Support	<a href="mailto:oisupport@arcresources.com">oisupport@arcresources.com</a>

### Accessing the OpenInvoice Field Ticket Application

#### Updating Your Permissions to include Field Tickets – IF YOU DO NOT HAVE OPENTICKET ON YOUR OPENINVOICE DESKTOP YET

In order to see the Ticket menu or dashboard, you will need to add those permissions to your company by doing the following:

1. Go to Membership > Departments & Roles
2. Click on the blue Department Name
3. Click on the Settings tab
4. Click Add Role
5. Enter Role Name, i.e Create Field Ticket
6. Select non-members on left and Add> them to the right (those users who would require the permission)
7. Click Submit
8. In the newly created Role row, please check the applicable permissions to the right, i.e Field Ticket View, Field Ticket Modify and Field Ticket Pricing
9. Click Submit
10. Log Out of OpenInvoice for the change to take effect.
11. Sign back in and then you should have access to the applicable options.



For Supplier Account OpenInvoice support, please contact:  
[openinvoicesupport@enverus.com](mailto:openinvoicesupport@enverus.com) or 1-866-627-3287

### Setting Up Your Stacks

To set up an "Approved, not yet Invoiced" stack to notify you when a ticket is approved and needs to be invoiced:

1. Go to Ticket > Stacks
2. Create Ticket Stack
3. Status = Approved
4. Invoiced Status = Not Invoiced
5. Save As - New Stack
6. Stack Name = Approved, Not Invoiced (for example)
7. Notify Me = check it if you want to receive notifications
8. Save

To receive notifications for tickets going into any existing stacks:

1. Go to Ticket>Stacks
1. Click on the gear icon beside the stack name
2. Click Configure
3. Check NOTIFY MEClick Save

**If the Field Ticket permissions already exist and the user doesn't have it assigned to their user profile, we will provide the following to them --> if they have the Membership Modify and Membership Admin permissions and the Self-Manage flag checked on their user profile:**

To assign organization roles:

1. Go to Membership > Users
2. Click on Your/User's First Name
3. Click on the Organization Roles tab
4. Click on the plus sign next to Site Name
5. Check the boxes on the left to assign the appropriate permissions to your profile
6. Click on Submit

You/user will need to sign out and log back in for changes to take effect.

### Guidelines for creating Field Ticket(s) and adding Line Item(s)

#### Part 1 – Create Field Ticket (“Direct Entry Method”)

You can create ticket by clicking on Ticket then “New Ticket”

Enter the following Ticket Information:

- **Ticket number** – Enter the number shown on your Field Ticket submitted from the field
- **Supplier Site Name** – This is the Supplier Site Name (You)
- **Company** – Select company to be ticketed (ARC)
- **Ticket Type** – Select from the drop-down list (listing of types below)
  - **General:** This is used for all field tickets that are not related to water hauling or not requiring details on the driver, truck, or truck capacity
  - **Water Hauling:** This is used for all water related tickets. Water Hauling field tickets allow for entry of details pertaining to the service; such as, driver and truck information, as well as disposal location and gauge readings
  - **Labor, Equipment, Material:** This is used for all labor, equipment, or material field tickets. The labor, equipment, material field tickets allow for entry of details pertaining to the people, equipment, or materials used.
  - **Facility:** This is used for all Facility AFEs including FAC, PLT, & PPL.

Once completed, click on next button.

Complete the field ticket data fields as per below:

## Field Ticket Data Fields – Header Area of the Ticket

Screen Field Label	Description	Applicable ticket types, required fields marked with an “ * “
Ticket Number	Enter Ticket number	All*
Requisitioner	Enter your Approver’s name (the person that would sign your ticket out in the field)	All*
Description	Enter the description of the field ticket	All
Truck Number	Number of the truck	Water Hauling*, LEM
Driver Name	Name of the driver	Water Hauling*

## Part 2 – Attaching Backup

Attach Backup – in the top right there is a box called Attachments and a button that indicates you can attach files.

ARC highly recommends an attachment on all electronic tickets. The attachment **does not** require a field signature and can be a PDF that indicates the work was done on site. Your Requisitioner may dispute your ticket if an attachment is not provided.

## Part 3 – Applying Coding to the Field Ticket

The field ticket **cannot** be submitted unless a line has been added.

- To apply coding to the ticket, click on “Add Line”

## OpenTicket Submission Guidelines



### Field Ticket Data Fields - Line

Screen Field Label	Description	Applicable ticket types, required fields marked with an “ * “
<b>Line Number</b>	Unique identifier for the ticket line.	All*
<b>Product/Service</b>	If you use any part numbers and/or Item ID's along with your service/product descriptions, you can enter your Part #/Item ID to populate the appropriate service/product description. If you do not use Part #/Item ID's, go to your description field (see instructions below). If you do not see it, please just enter the word “product”.	All*
<b>Description</b>	Use the “Search” engine to search your existing service/product catalog in OpenInvoice and select the appropriate service/product description. To setup a Product/Service, please see below.	All*
<b>Service Start</b>	Enter the start date of your service.	All*
<b>Service End</b>	Enter the end date of your service	All
<b>Location</b>	Lease/Well/Plant Name	All*
<b>Hours Worked</b>	Enter the amount of hours/minutes worked. This field will not accept excessive hours such as “24 hours”. If hours aren't defined, you can enter “0” hours to bypass these fields.	Water Hauling, LEM
<b>Disposal Ticket</b>	This field is specific to “Water Hauling” ticket types. The ticket number associated with the disposal of fluids	Water Hauling
<b>Disposal Location</b>	This field is specific to “Water Hauling” ticket types. The name of the disposal site	Water Hauling
<b>Payload</b>	List the type of service/product you provided. (Example: If you are a water hauler, specify what type of water was provided).	Water Hauling*
<b>Gauge Start</b>	Original reading of the gauge	Water Hauling
<b>Gauge Finish</b>	Final reading of the gauge	Water Hauling
<b>Volume</b>	Total quantity of fluids hauled	Water Hauling*
<b>Charge By</b>	Select how you are charging – Hours, Volume, Other	Water Hauling*
<b>Charge Type</b>	Select whether this is a Labor, Equipment or Material ticket, form the drop down menu.	LEM*

## OpenTicket Submission Guidelines



<b>Crew Member</b>	For a Charge Type of Labor, enter the Crew Member's name in this field.	LEM*
<b>License Number</b>	For a Charge Type of Labor, enter the license number for the crew member listed, if applicable.	LEM
<b>Equipment ID</b>	For a Charge Type of Equipment, enter the unique identifier tied to that piece of equipment	LEM
<b>Quantity</b>	Number of units (see units of measure)	All*
<b>Units</b>	Units of measure (hours, each, day, feet, etc.)	All*
<b>Rate</b>	Service rate or product unit price	All*

If coding is provided, please enter it.

Once completed click on "Save". This is now saved in your system but ARC cannot see it until you hit "Submit". (see below)

If an edit needs to be completed, click on 'Bulk Edit Lines' and update as required. If a line has been mistakenly added, click on the delete button (garbage can).

If everything is completed as per the attached ticket, hit the Submit button.

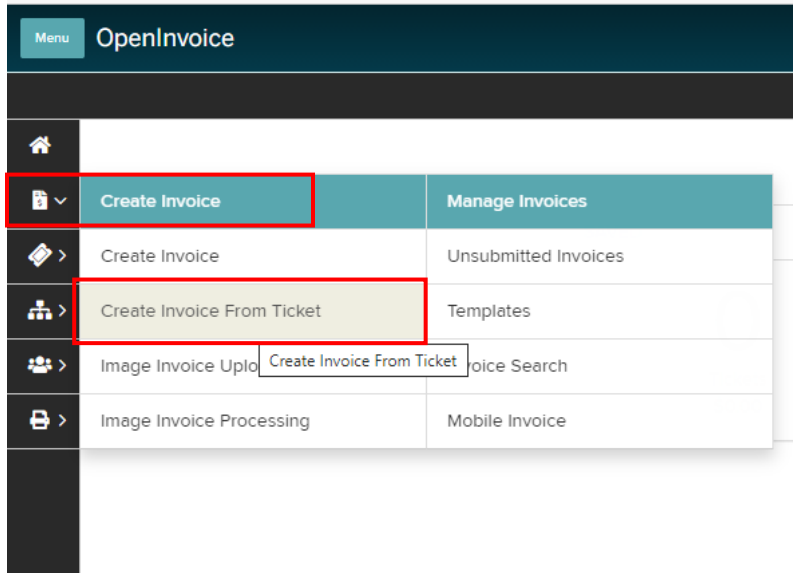
If there are any additional comments add them in the comments box. If you click on 'No', it will take you back to the ticket to do more edits. Otherwise, click 'Yes, submit ticket'.

**\*\* Field Ticket is now successfully created \*\***



### Creating an Invoice for Ticket(s) created in the Ticket Application (“FLIPPING” YOUR APPROVED TICKET INTO AN INVOICE)

- To create an Invoice for a specific Ticket, click on Menu, then “Create Invoice From Ticket”



- In Ticket Search, select “**Approved**” on the Status dropdown, “**ARC Resources Ltd.**” on the Buyer Name and “**Not Invoiced**” on the Invoiced Status dropdown. Then click on the search. tickets button.

# OpenTicket Submission Guidelines



TICKET NUMBER  
Type to add...

DATE CRITERIA  
Please select...

TICKET APPROVER  
Type to add...

TICKET TYPE  
Please select...

STATUS  
Approved x Click to add

BUYER NAME  
ARC Resources Ltd x

INVOICED STATUS  
Not Invoiced x

SEARCH DATE FROM  
MM/DD/YYYY

SEARCH DATE TO  
MM/DD/YYYY

REQUISITIONER  
Type to add...  None

LOCATION

SUPERINTENDENT

AFE  
Type to add...

OFFICE APPROVER

COST CENTER  
Type to add...  None

PO  
Type to add...  None

MIN. AMOUNT

MAX. AMOUNT

**Search**

Invoice  Submit  Save  Export...

<input type="checkbox"/>	Alert	Ticket Number	Service Start	Buyer Name	Currency	Amount	Status	Location	AFE	Coding	Attachments
<input type="checkbox"/>		4570	06/09/2021	ARC Resources Ltd	CAD	350	Approved	16-15-35-84		9450.88	1

1 record found.

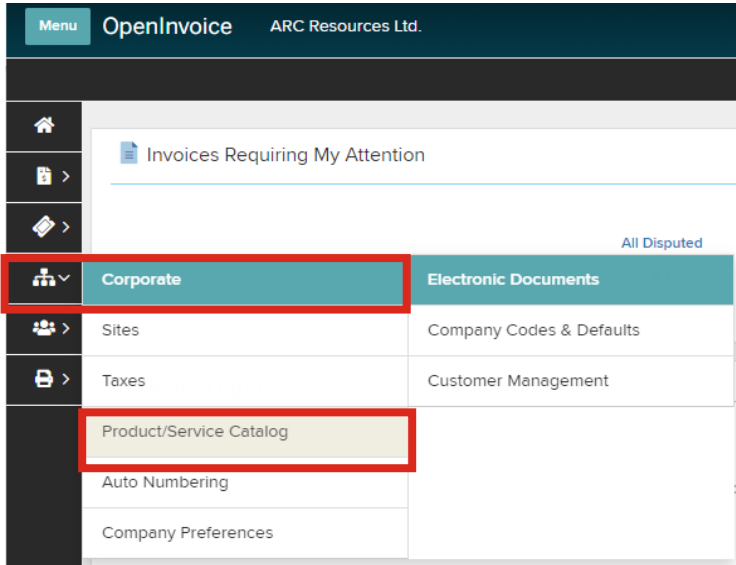
- Select the tickets that you want to flip into an invoice and click the “Invoice” button
- A pop-up message box will ask you if you are sure, click on ‘Yes, Invoice Ticket’ or if you have further edits or need to add additional tickets, click ‘cancel’.

From here on, the steps should be like creating a regular invoice in OpenInvoice. Please refer to ARC OpenInvoice Supplier Guidelines if needed.

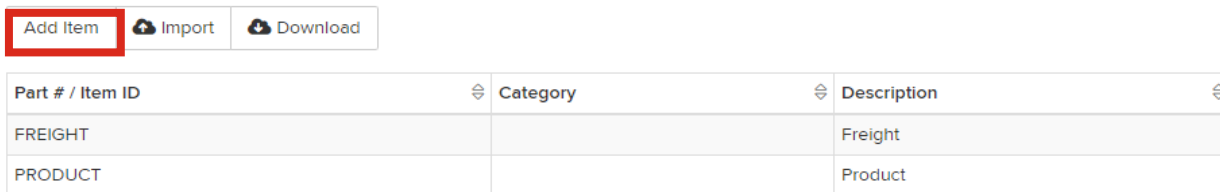
## How to setup Product/Service

This section of OpenInvoice offers the capability for Suppliers to enter Products or Services related to its business.

In OpenInvoice, click on “Corporate” then select “Product/Service Catalog”



Once selected, click on “Add Item”.



2 record(s) found

## OpenTicket Submission Guidelines



Add Information for Product/Service Item

Add Item

**Part # / Item ID**

**Category**

**Description\***

**List Price/Units**

**Public** ⓘ  
 YES  NO

- **Part/Item ID** – Enter “1” if this is the first product/service being setup. Otherwise enter the next sequential number
- **Category** – Choose a category such as “Product or Service”
- **Description** – Provide a description of the item on the Ticket being charged
- **List Price/Units** – Enter Price and the Unit (e.g. List Price as “\$150”, Unit as “Hr.”)
- **Public** – Change the default Yes to No if you do not wish to make this viewable to the Company being billed

Click on save and this item will be available next time you create a ticket. If there are multiple items that need to be included, an import can also be completed.

# OpenTicket Submission Guidelines



First a download will be required to obtain all existing items in the catalog. This will also provide the format that the import can be completed in.

Part # / Item ID	Category
FREIGHT	
PRODUCT	

3 record(s) found

Obtain the downloaded file and enter the new services or products. The action will need to be **“ADD”** for any new items added to the catalog. The items that were previously there, can remain as **“LEAVE.”**

A	B	C	D	E	F	G	H	I
Service Code	Service Category	Service Description	Units	Unit Price	Public	Action	Row#(DO NOT MODIFY/DELETE)	
PRODUCT		Product			Yes	Leave	XZWztj+oeGENXKXykaD84g==	
FREIGHT		Freight			Yes	Leave	XMjTeUVwz2ut16c0yHRr4g==	
PRODUCT	Supplier	Rags	1	1.5	Yes	ADD	uFtYWkFYnp31UIYdDX+8yg==	

## OpenTicket Submission Guidelines



Once all the additions have been completed click on the “**Import**” button.

Part # / Item ID	Category
FREIGHT	
PRODUCT	

2 record(s) found

This will provide two options, either uploading a file if there are many items, or a copy and paste for a few items.

When a copy/paste is completed, it may look a little funny, however it will still go through.

Click Upload.

Import Method:  File  Copy/Paste

Paste: (from spreadsheet/file in tsv format)

Service Code	Service Category	Service Description	Units	Unit Price	Public	Action	Row#(DO NOT MODIFY/DELETE)
PRODUCT	Product	Yes Leave	XZWztj+oeGENXKXykaD84g==				
FREIGHT	Freight	Yes Leave	XMjTeUVvz2ut16cOyHR4g==				
Regs	Supplier Regs	1 1.5 Yes ADD	uFYWkFYnp31UIYdDX+8yg==				

The new item(s) will be available.

# OpenTicket Submission Guidelines



[Catalog Preferences](#)

Add Item [Import](#) [Download](#) All Customers x

Part # / Item ID	Category	Description	Units	List Price	Public	Used By
Regs	Supplier	Regs	1	1.5	✓	
FREIGHT		Freight			✓	
PRODUCT		Product			✓	1 Customer

3 record(s) found

If you have a product catalog with pricing, ARC is also able to setup a Pricebook. This will allow the Requisitioner to match agreed upon pricing to the ticket which will help facilitate quicker processing times for tickets and invoices. If this is something that would be of interest, please contact the [oisupport@arcresources.com](mailto:oisupport@arcresources.com).

## B2B and Direct Entry Suppliers - initial setup of the tickets.

### Types of Field Tickets

Ticket Name	Supported By
General	JSON and PDIX
Hauling	JSON
Labor, Equipment and Materials (LEM)	JSON
Facility	JSON

### Testing Data for Field Tickets

Field Label	Field Value
AFE	19DRL0029
Cost Center	29072
Major/Minor/Sub	8300/521
Requisitioner	

## JSON Field Ticket Requirements

Recommended API format

Screen Field Label	Description	JSON Tag	Format
Header Description	Required: WHO, WHERE, WHY/WHAT – Include description of product/service delivered, rig/location, well/lease. Enter the original invoice number for credit invoice.	"description"	Text
Truck Number	Number of the truck used	"truckNumber"	Text
Driver Name	First and last name of the driver	"driver"	Text
Truck Capacity	Total capacity for the vehicle hauling fluids	"truckCapacity"	Number
AFE	The AFE number is one of the buyer's cost objects and is validated against the list of AFE numbers entered by the buyer in OpenInvoice.	"afe": { "number": "ABCD" },	Text
Cost Center	The cost center number is one of the buyer's cost objects and is validated against the list of cost center numbers entered by the buyer in OpenInvoice.	"costCenter": { "number": "123" },	Text
Location	The location is a description of where the work was physically performed by the supplier.	"location": "Demo Location",	Text



## OpenTicket Submission Guidelines



<b>Contract</b>	Price Book Number	"contract": { "number": "1234" },	Text
<b>Major/Minor/Subcode</b>	Major/Minor/Subcode supplied by the Buyer	"major": { "code": "2000" }, "minor": { "code": "220" }, "subcode": { "code": "22" },	Text
<b>PO Number</b>	Purchase Order Number	"poNumber": "123",	Text
<b>Requisitioner</b>	The ordered by name represents the first and last name of the receipt's requisitioner.	"orderedByName": "Michael Field",	FirstName LastName
<b>SuperIntendent</b>	The superintendent is the person who supervises the field personnel.	"superintendentName": "Joe Supervisor",	FirstName LastName
<b>Office Approver</b>	Office Approver is the individual who will approve the receipt.	"officeApproverName": "Mary Approver",	FirstName LastName
<b>Hours Worked</b>	Number of hours worked for that line	"hoursWorkedUnit"; "hoursWorkedSubunit"	Number
<b>Disposal Ticket</b>	Disposal location's ticket number	"disposalTicket"	Text
<b>Disposal Location</b>	Name of the disposal site	"disposalLocation"	Text
<b>Payload</b>	What was hauled (i.e. Fresh Water)	"payload"	Text
<b>Gauge Start</b>	Original reading of the gauge	"gaugeStartUnit"; "gaugeStartSubunit"	Number
<b>Gauge Finish</b>	Final reading of the gauge	"gaugeFinishUnit"; "gaugeFinishSubunit"	Number
<b>Volume</b>	Total quantity of fluids hauled	"volume"	Number
<b>Volume UOM</b>	Unit of measure for the volume hauled (i.e. bbl)	"volumeUOM"	Text
<b>Charge Type</b>	Labor, Equipment or Material	"chargeType": "Labor"	Text

## OpenTicket Submission Guidelines



<b>Charge By</b>	Select how you are charging – Hours, Volume, Other	"chargeBy": "Hours"	Text
<b>Crew Member</b>	Name of crew member	"crewmember"	Text
<b>License Number</b>	License number of crew member (i.e. electrician)	"licenseNumber"	Text
<b>Equipment ID</b>	Unique identifier tied to equipment	"equipmentId"	Text
<b>Service Date From</b>	Start Date of Service - Mandatory for each invoice line item	"serviceDateFrom": "2016-03-01",	YYYY-MM-DD
<b>Service Date To</b>	End Date of Service – Mandatory for each invoice line item	"serviceDateTo": "2016-03-01",	YYYY-MM-DD

## JSON Field Ticket Requirements – Custom Data Fields

*Custom Data Fields are not supported by PIDX Suppliers.*

Screen Field Label	Description	JSON Details	JSON Tag	Format
<b>Custom Field</b>	Description for the custom field	"name": Custom Field "code": CustomField	"additionalDataFields/value"	Text

## PIDX Field Ticket Requirements

Screen Field Label	Description	PIDX XMLTag	Pidx Format
<b>Header Description</b>	Required: WHO, WHERE, WHY/WHAT – Include description of product/service delivered, rig/location, well/lease. Enter the original invoice number for credit invoice.	FieldTicketProperties.Comment	Text
<b>AFE</b>	AFE	FieldTicketDetails.FieldTicketLineItem.ReferenceInformation.AFENumber	Text

## OpenTicket Submission Guidelines



<b>Cost Center</b>	CC	FieldTicketDetails.FieldTicketLineItem.ReferenceInformation.CostCenter	Text
<b>Location</b>	Lease/Well/Plant	FieldTicketDetails.FieldTicketLineItem.JobLocationInformation.WellInformation.WellIdentifier	Text
<b>Contract</b>	Price Book Number	FieldTicketDetails.FieldTicketLineItem.ReferenceInformation.ContractNumber	Text
<b>Major/Minor/Subcode</b>	Major/Minor	FieldTicketDetails.FieldTicketLineItem.ReferenceInformation.OperatorGeneralLedgerCode	Format that you set in OI. EX: XXXX.XXX
<b>WO Number</b>	Work Order	FieldTicketDetails.FieldTicketLineItem.ReferenceInformation.JobNumber	Text
<b>Asset Number</b>	Asset Number	FieldTicketDetails.FieldTicketLineItem.ReferenceInformation.CustomerAccountingReference	Text
<b>PO Number</b>	Purchase Order Number	FieldTicketDetails.FieldTicketLineItem.PurchaseOrderInformation.PurchaseOrderNumber	Text
<b>PO Line #</b>	Purchase Order Line Number	FieldTicketDetails.FieldTicketLineItem.PurchaseOrderLineItemNumber	Text
<b>Requisitioner</b>	Person who requested the work	FieldTicketDetails.FieldTicketLineItem.PartnerInformation.ContactInformation.ContactName	FirstName LastName
<b>Service Date From</b>	Start Date of Service - Mandatory for each invoice line item	FieldTicketDetails.FieldTicketLineItem.ServiceDateTime.ServicePeriodStart	YYYY-MM-DDTHH:MM:SS
<b>Service Date To</b>	End Date of Service – Mandatory for each invoice line item	FieldTicketDetails.FieldTicketLineItem.ServiceDateTime.ServicePeriodEnd	YYYY-MM-DDTHH:MM:SS
<b>Line Item Comment</b>	Comment of the work completed	FieldTicketDetails.FieldTicketLineItem.Comment	Text