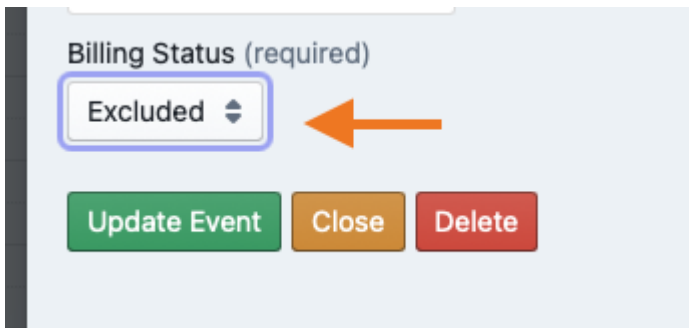


# Order Management

- [Approving an event order](#)
- [Approving a single order](#)
- [Batch approving orders](#)
- [Adding a line item order batch](#)
- [Altering an order](#)
- [Refund / Discount Process](#)
- [Excluding an order](#)

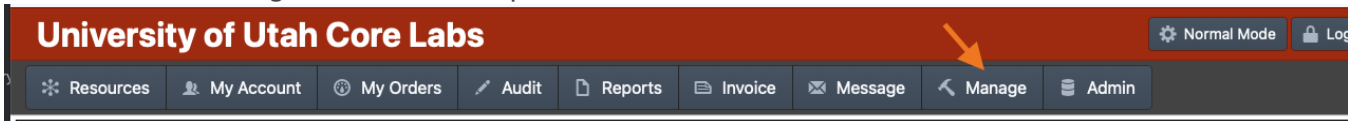
# Approving an event order

Group managers can alter the billing status of individual events from the calendar event details using the "Billing Status" dropdown and then clicking the "Update Event" button.

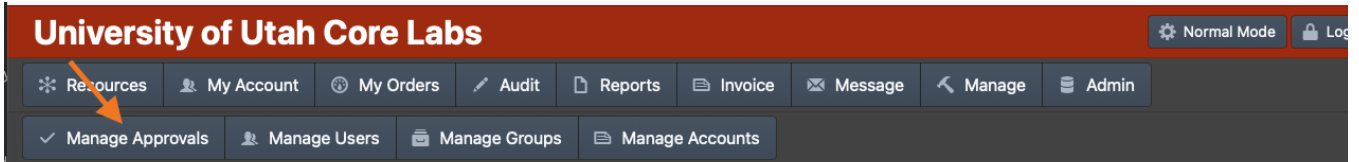


# Approving a single order

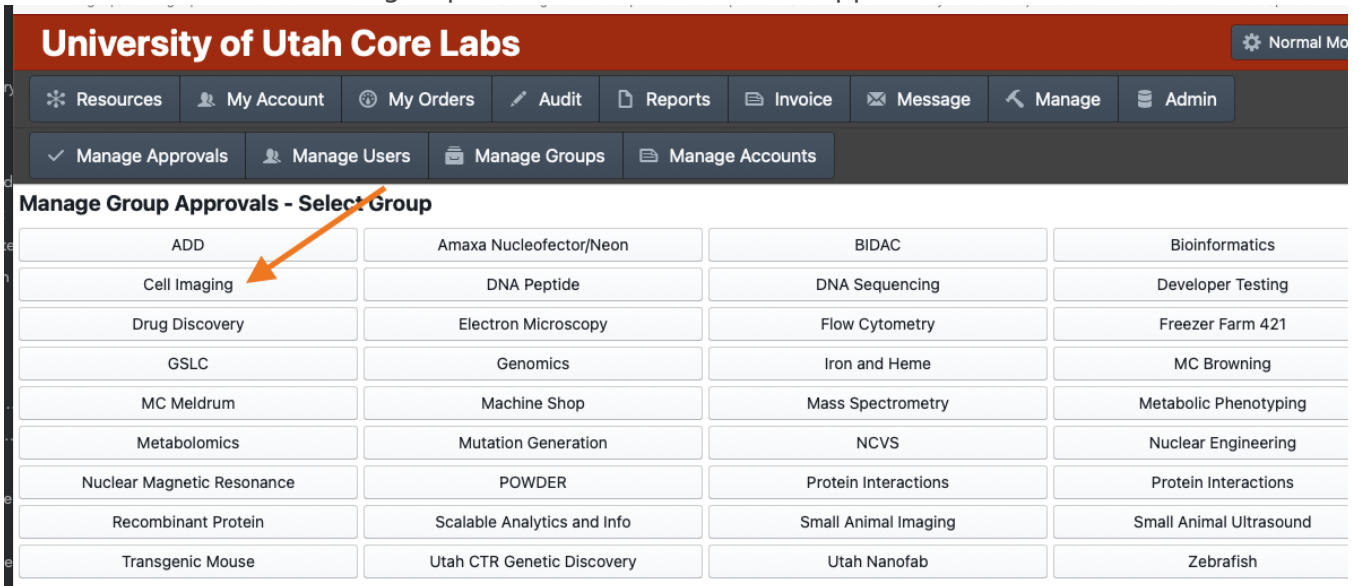
1. Click on the "Manage" icon in the top bar



2. Click on "Manage Approvals"



3. Click on the button for the group that has the order to be approved



4. Click on the order row you wish to approve

Status	Order	Total (\$803.81)	Date	Service	User (PI)	Account
<input type="checkbox"/> Pending	313088	\$102.58	2021-04-01	DNA Synthesis, 40nMole	Cameron Meikle (Wesley Sundquist)	17029 (593034)
<input type="checkbox"/> Pending	313064	\$6.08	2021-03-31	DNA Synthesis, 25nMole, Desalted	Aldo Eduardo Garcia Guerrero (Paul Sigala)	17707 (5100583)
<input type="checkbox"/> Pending	313053	\$92.20	2021-03-31	DNA Synthesis, 40nMole	Lara Rheinemann (Wesley Sundquist)	17029 (593034)
<input type="checkbox"/> Pending	313050	\$5.42	2021-03-31	DNA Synthesis, 25nMole, Desalted	Hyungseok Kim (Jan Christian)	17415 (22316)
<input type="checkbox"/> Pending	313038	\$15.60	2021-03-31	DNA Synthesis, 25nMole, Desalted	Erik Eide (Charles Murtaugh)	16780 (5931270)

5. Click on the "Approve" button

**Order Details : 313064**

### User/Account

PO Number

Base Cost      Cost Modifier      Cost Multiplier      Calculated Total

### Lines

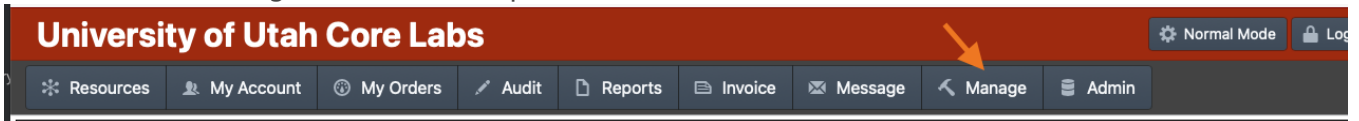
ID	Description	Quantity	Rate	Commercial Rate	Details
320961	<input type="text" value="mKATE Rv1"/>	<input type="text" value="1"/>	6.08	9.27	<a href="#">Details/Data</a>

### Line Item Add Form

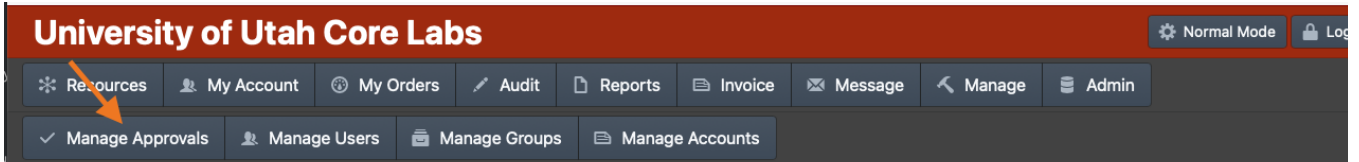
Description      Quantity      Rate      Commercial Rate

# Batch approving orders

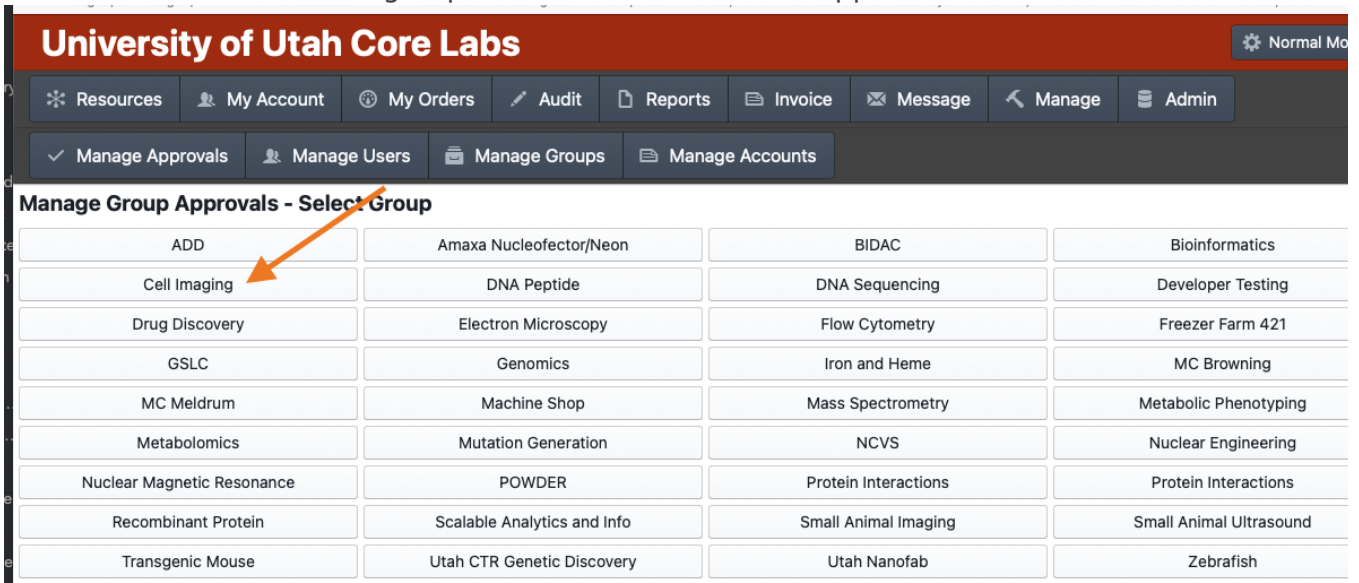
1. Click on the "Manage" icon in the top bar



2. Click on "Manage Approvals"




3. Click on the button for the group that has the order to be approved



4. Use the check boxes next to the order rows to select all orders that you wish to approve. You can also use the "Select All Valid" button to select all error free orders that do not occur in the future for approval.

### DNA Peptide Order Approvals

Select State  
Pending   
Warning : loading large date ranges or a large number of orders ( > 500 ) may take a long time to load. Please limit ranges to reasonable sizes.


Filter Results (Case Sensitive)...

**Add Batch** Approve Selected Select All Valid Deselect All

Status	Order	Total (\$803.81)	Date	Service	User (PI)	Account
<input type="checkbox"/>	Pending 313088	\$102.58	2021-04-01	DNA Synthesis, 40nMole	Cameron Meikle (Wesley Sundquist)	17029 (59303434)
<input checked="" type="checkbox"/>	Pending 313064	\$6.08	2021-03-31	DNA Synthesis, 25nMole, Desalted	Aldo Eduardo Garcia Guerrero (Paul Sigala)	17707 (51005833)
<input checked="" type="checkbox"/>	Pending 313053	\$92.20	2021-03-31	DNA Synthesis, 40nMole	Lara Rheinemann (Wesley Sundquist)	17029 (59303434)
<input checked="" type="checkbox"/>	Pending 313050	\$5.42	2021-03-31	DNA Synthesis, 25nMole, Desalted	Hyungseok Kim (Jan Christian)	17415 (22316)
<input checked="" type="checkbox"/>	Pending 313038	\$15.60	2021-03-31	DNA Synthesis, 25nMole, Desalted	Erik Eide (Charles Murtaugh)	16780 (59312701)
<input type="checkbox"/>	Pending 313001	\$24.00	2021-03-31	DNA Synthesis, 200nMole	Aimee Sanford (Jennifer Heemstra)	18197 (xxxxxx)
<input type="checkbox"/>	Pending 312999	\$15.24	2021-03-31	DNA Synthesis, 25nMole, Desalted	Qinzhe Wang (Erhu Cao)	17179 (59313210)
<input type="checkbox"/>	Pending 312958	\$5.31	2021-03-31	DNA Synthesis, 25nMole, Desalted	Millicent Wood (Randall Peterson)	18603 (26751)
<input type="checkbox"/>	Pending 312959	\$5.42	2021-03-31	DNA Synthesis, 25nMole, Desalted	Millicent Wood (Randall Peterson)	18603 (26751)

5. Click the "Approve Selected" button

### DNA Peptide Order Approvals

Select State  
Pending   
Warning : loading large date ranges or a large number of orders ( > 500 ) may take a long time to load. Please limit ranges to reasonable sizes.


Filter Results (Case Sensitive)...

**Add Batch** Approve Selected Select All Valid Deselect All



Status	Order	Total (\$803.81)	Date	Service	User (PI)	Account
<input type="checkbox"/>	Pending 313088	\$102.58	2021-04-01	DNA Synthesis, 40nMole	Cameron Meikle (Wesley Sundquist)	17029 (59303434)
<input checked="" type="checkbox"/>	Pending 313064	\$6.08	2021-03-31	DNA Synthesis, 25nMole, Desalted	Aldo Eduardo Garcia Guerrero (Paul Sigala)	17707 (51005833)

6. Click the "Confirm" button

### DNA Peptide Order Approvals

Select State  
Pending   
Warning : loading large date ranges or a large number of orders ( > 500 ) may take a long time to load. Please limit ranges to reasonable sizes.

Filter Results (Case Sensitive)...

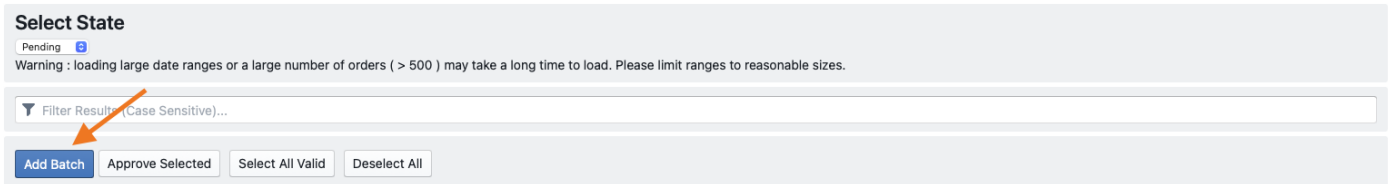
**Add Batch** Cancel  Confirm  Select All Valid Deselect All

Status	Order	Total (\$803.81)	Date	Service	User (PI)	Account
<input type="checkbox"/>	Pending 313088	\$102.58	2021-04-01	DNA Synthesis, 40nMole	Cameron Meikle (Wesley Sundquist)	17029 (59303434)

# Adding a line item order batch

For groups that need to add large numbers of line item orders there is a Batch Upload form available for managers. This can be accessed from the "Manage Approvals" interface.

## Developer Testing Order Approvals



Select State

Pending

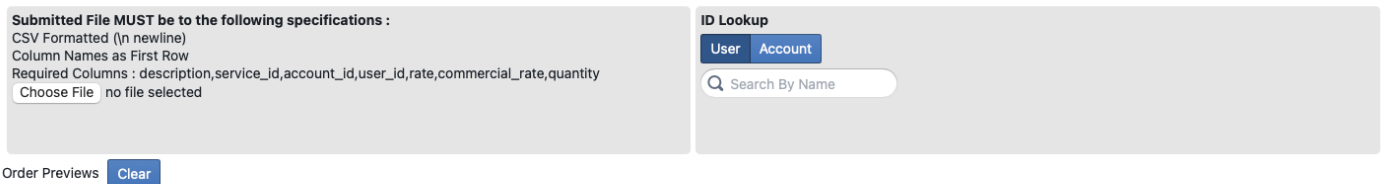
Warning : loading large date ranges or a large number of orders (> 500 ) may take a long time to load. Please limit ranges to reasonable sizes.

Filter Results (Case Sensitive)...

Add Batch Approve Selected Select All Valid Deselect All

This will take you to the batch order upload interface.

## Add Orders by Batch to Developer Testing



Submitted File MUST be to the following specifications :

CSV Formatted (\n newline)  
Column Names as First Row  
Required Columns : description,service\_id,account\_id,user\_id,rate,commercial\_rate,quantity

Choose File no file selected

ID Lookup

User Account

Search By Name

Order Previews Clear

This interface allows managers to upload and validate a list of charges to be grouped by charge account into orders. The order CSV file must include the following fields:

1. Charge description
2. Service ID (system id) of the service to create the charge for
3. Account ID (system id, not short account) of the account to be charged
4. User ID (system id) of the user who is ordering the charge. Note that this ID MUST be an account that is both valid and that the provided user is authorized to charge on.
5. The rate per item to charge
6. The commercial rate per item to charge
7. The quantity to be charged for

**Note that line items will be grouped into orders based on the account\_id and user\_id fields. If you need line items for the same user and account to appear in separate orders you will need to upload them in separate files**

After upload the system will provide feedback on the uploaded file, including any errors

# Add Orders by Batch to Developer Testing

## Submitted File MUST be to the following specifications :

CSV Formatted (\n newline)

Column Names as First Row

Required Columns : description,service\_id,account\_id,user\_id,rate,commercial\_rate,quantity

Choose File test\_batch\_order.csv

## ID Lookup

User

Account

Search By Name

Order Previews [Clear](#)

Test Line Items [Developer Test Dummy Account](#) [Elliot Francis](#)

1 X \$10 = \$10 : Test Item (Valid)

Order Total : \$10

Test Line Items [Developer Dummy Account - Commercial](#) [Elliot Francis](#)

1 X \$100 = \$100 : Test Item (Valid - Commercial)

Order Total : \$100

Test Line Items [The Genetic Analysis of Mitochondrial Iron Metabolism - 59300599](#) [Elliot Francis](#)

1 X \$10 = \$10 : Test Item (Invalid - Commercial)

Order Total : \$10

The selected user is not authorized to use the provided account.

Once any issues have been resolved a "Submit" button will appear at the bottom of the list of orders

# Add Orders by Batch to Developer Testing

## Submitted File MUST be to the following specifications :

CSV Formatted (\n newline)

Column Names as First Row

Required Columns : description,service\_id,account\_id,user\_id,rate,commercial\_rate,quantity

Choose File test\_batch\_order.csv

## ID Lookup

User

Account

Search By Name

Order Previews [Clear](#)

Test Line Items [Developer Test Dummy Account](#) [Elliot Francis](#)

1 X \$10 = \$10 : Test Item (Valid)

Order Total : \$10

Test Line Items [Developer Dummy Account - Commercial](#) [Elliot Francis](#)

1 X \$100 = \$100 : Test Item (Valid - Commercial)

Order Total : \$100

[Submit Batch](#)



After a successful submit you will be returned to the "Approvals" screen and the newly created orders will appear on the orders list.

# Developer Testing Order Approvals

## Select State

Pending 

Warning : loading large date ranges or a large number of orders ( > 500 ) may take a long time to load. Please limit ranges to reasonable sizes.

 Filter Results (Case Sensitive)...

Add Batch

Approve Selected

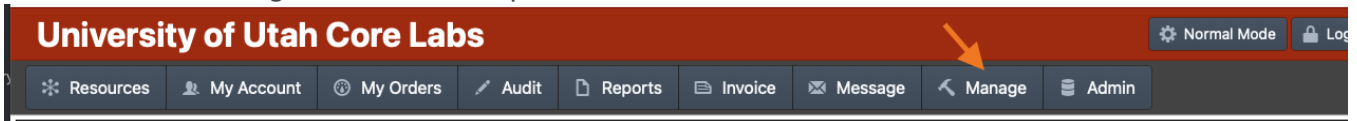
Select All Valid

Deselect All

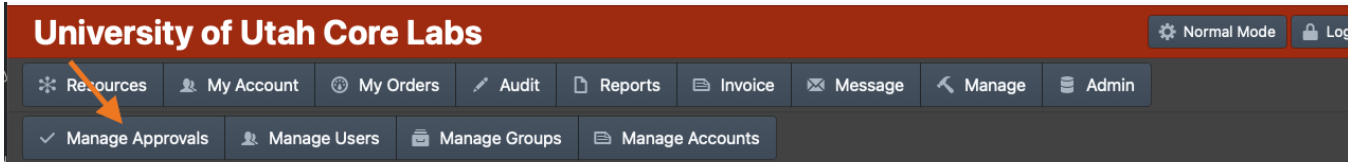
	Status	Order	Total (\$110.00)	Date	Service
<input type="checkbox"/>	Pending	305300	\$10.00	2021-04-09	Test Line Items
<input type="checkbox"/>	Pending	305301	\$100.00	2021-04-09	Test Line Items

# Altering an order

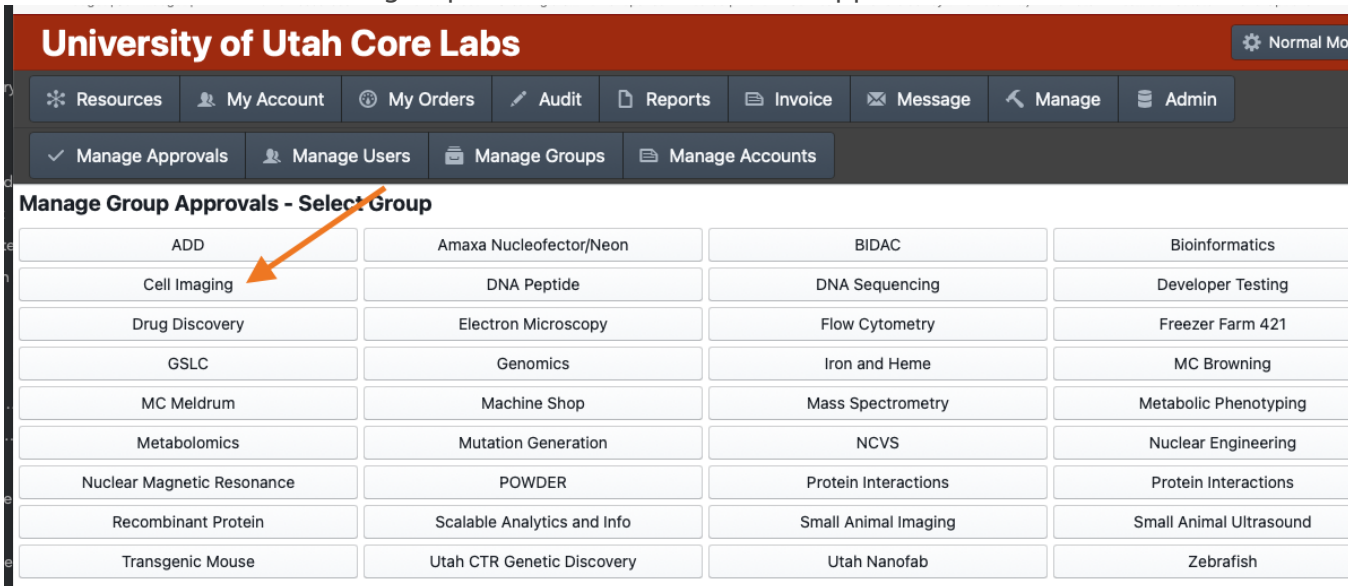
1. Click on the "Manage" icon in the top bar



2. Click on "Manage Approvals"



3. Click on the button for the group that has the order to be approved



4. Click on the order row you wish to edit

Status	Order	Total (\$803.81)	Date	Service	User (PI)	Account
<input type="checkbox"/> Pending	313088	\$102.58	2021-04-01	DNA Synthesis, 40nMole	Cameron Meikle (Wesley Sundquist)	17029 (593034)
<input type="checkbox"/> Pending	313064	\$6.08	2021-03-31	DNA Synthesis, 25nMole, Desalted	Aldo Eduardo Garcia Guerrero (Paul Sigala)	17707 (5100583)
<input type="checkbox"/> Pending	313053	\$92.20	2021-03-31	DNA Synthesis, 40nMole	Lara Rheinemann (Wesley Sundquist)	17029 (593034)
<input type="checkbox"/> Pending	313050	\$5.42	2021-03-31	DNA Synthesis, 25nMole, Desalted	Hyungseok Kim (Jan Christian)	17415 (22316)
<input type="checkbox"/> Pending	313038	\$15.60	2021-03-31	DNA Synthesis, 25nMole, Desalted	Erik Eide (Charles Murtaugh)	16780 (5931270)

5. Edit any details of the order you wish to change and then click the "Save" button.

**Order Details : 304916**

**User/Account**

Minna Roh-Johnson   **1**

DOD W81XWH-19-BCRP-BTA-12-2 - 5590   **2**

PO Number

Base Cost: \$ 136.50    Cost Modifier: \$ 10    Cost Multiplier: x 1    Calculated Total: \$ 146.50

Modification Explanation

**3**

**Events**

Service	ID	Date	On	Off	Total	Cost	Details
Leica Spinning Disk EEJMRB Rm 5122	151410	2021-02-11 14:00:00 to 2021-02-11 19:00:00	[3]	[2]	[5]	\$136.50	<a href="#">Details/Data</a>

**Line Item Add Form**

Description:     Quantity:     Rate:     Commercial Rate:

**Note: Line item's on existing orders can only have their quantity altered. If a line MUST have it's rate altered please zero out the desired line and add a new Line Item using the "Line Item Add Form"**

## Adding a Line Item

Line items can be added to any order by using the "Line Item Add Form". This form functions the same as a standard line item form absent the custom data fields. Please note that added line items CANNOT be remove and instead must be zeroed out after adding.

# Refund / Discount Process

For historical reasons orders cannot be voided or deleted from the system. Occasionally mistakes are made and a refund must be issued. To do so a manager must submit a new order with a negative value to be processed with the next billing cycle.

## Process

1. Go to a "Dynamic Order Form" (Often labeled "Line Item") service as a manager
2. Select the user the refund will be applied to
3. Select the account the refund will be applied to
4. Enter a line item that results in a negative number
5. Submit the form
6. Approve the created order for inclusion in the next billing cycle.

Dynamic Order Form - Test Line Items

### User/Account

PO Number :

Order Date : 2021-04-08

### Order Lines

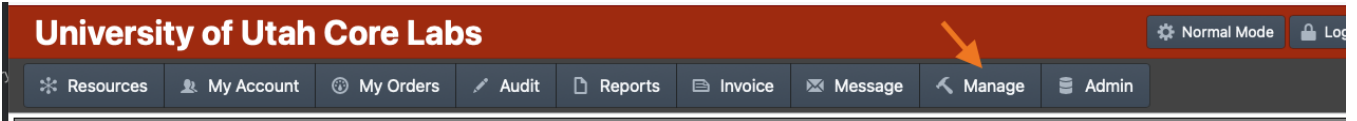
Description	Amount	Rate	Commercial Rate	Line Total	
<input type="text" value="Test Refund for Order # 12:"/>	<input type="text" value="1"/>	<input type="text" value="-100"/>	<input type="text" value="-100"/>	<input type="text" value="\$-100.00"/>	<input type="button" value="Remove"/>

Vendor Price

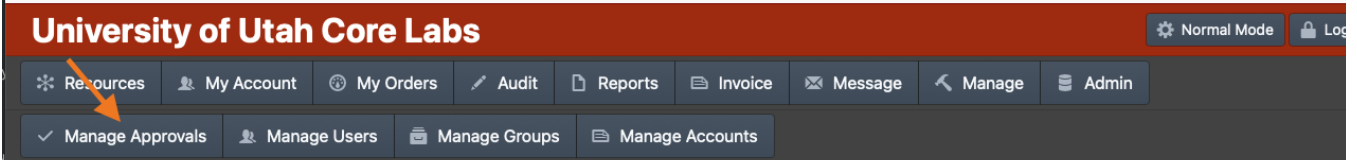
Order Total :  $\$-100.00 \times 1.525 = \$-152.50$

# Excluding an order

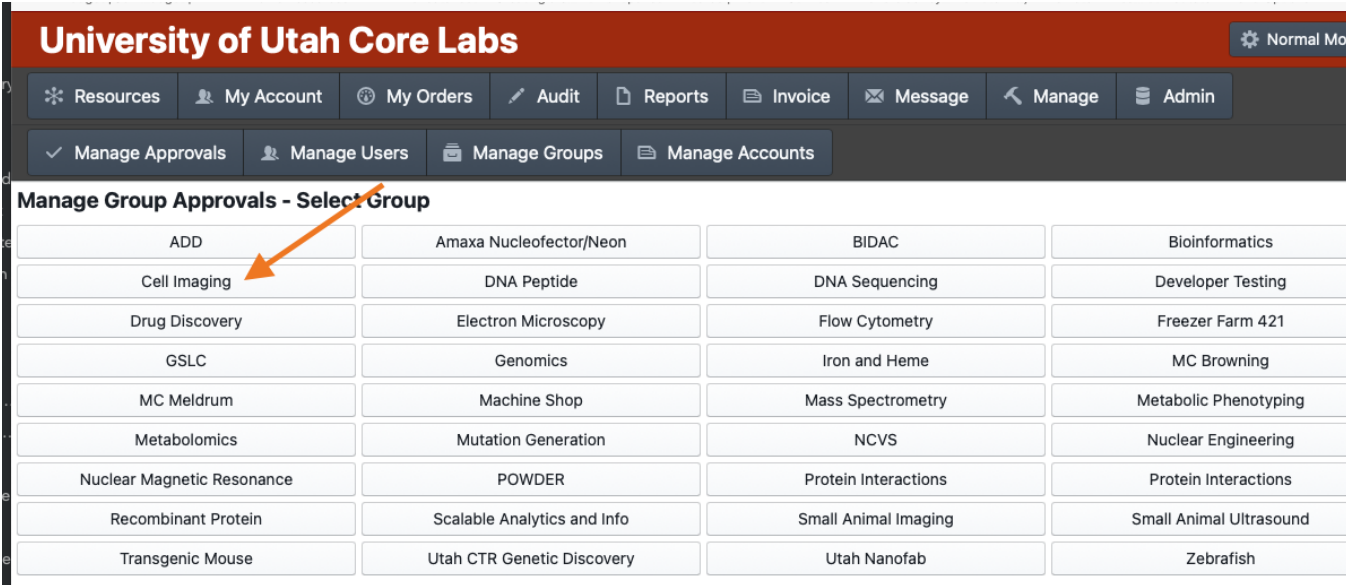
1. Click on the "Manage" icon in the top bar



2. Click on "Manage Approvals"



3. Click on the button for the group that has the order to be approved



4. Click on the order row you wish to approve

Status	Order	Total (\$803.81)	Date	Service	User (PI)	Account
<input type="checkbox"/> Pending	313088	\$102.58	2021-04-01	DNA Synthesis, 40nMole	Cameron Meikle (Wesley Sundquist)	17029 (593034)
<input type="checkbox"/> Pending	313064	\$6.08	2021-03-31	DNA Synthesis, 25nMole, Desalted	Aldo Eduardo Garcia Guerrero (Paul Sigala)	17707 (5100583)
<input type="checkbox"/> Pending	313053	\$92.20	2021-03-31	DNA Synthesis, 40nMole	Lara Rheinemann (Wesley Sundquist)	17029 (593034)
<input type="checkbox"/> Pending	313050	\$5.42	2021-03-31	DNA Synthesis, 25nMole, Desalted	Hyungseok Kim (Jan Christian)	17415 (22316)
<input type="checkbox"/> Pending	313038	\$15.60	2021-03-31	DNA Synthesis, 25nMole, Desalted	Erik Eide (Charles Murtaugh)	16780 (5931270)

5. Click on the "Exclude" button

**Order Details : 304916**

### User/Account

PO Number

Base Cost      Cost Modifier      Cost Multiplier      Calculated Total

### Events

Service	ID	Date	On	Off	Total	Cost	Details
Leica Spinning Disk EEJMRB Rm 5122	151410	2021-02-11 14:00:00 to 2021-02-11 19:00:00	[3]	[2]	[5]	\$136.50	<a href="#">Details/Data</a>

### Line Item Add Form

Description      Quantity      Rate      Commercial Rate

304916      306.00      2021-02-09      Leica Spinning Disk EEJMRB Rm 5122      Elizabeth Brinkman (mary.Brinkman)