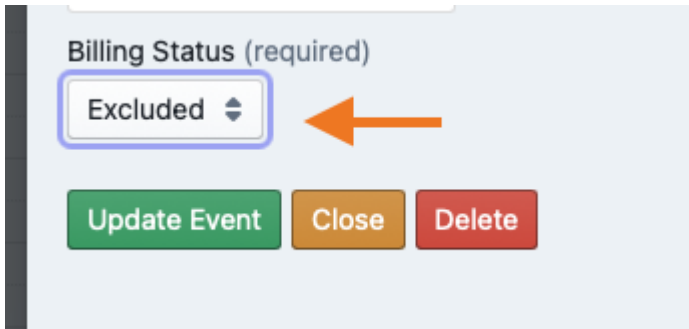


Order Management

- [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](#)

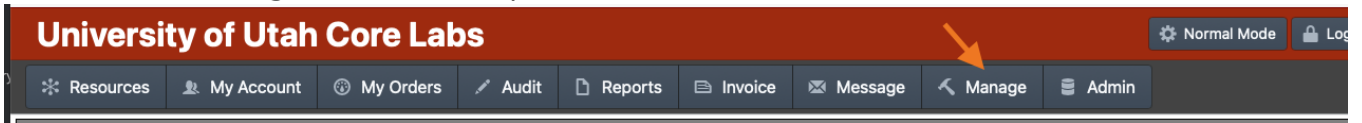
Approving an event order

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.

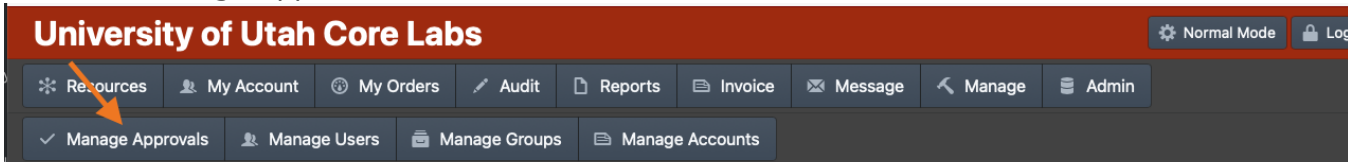


Approving a single order

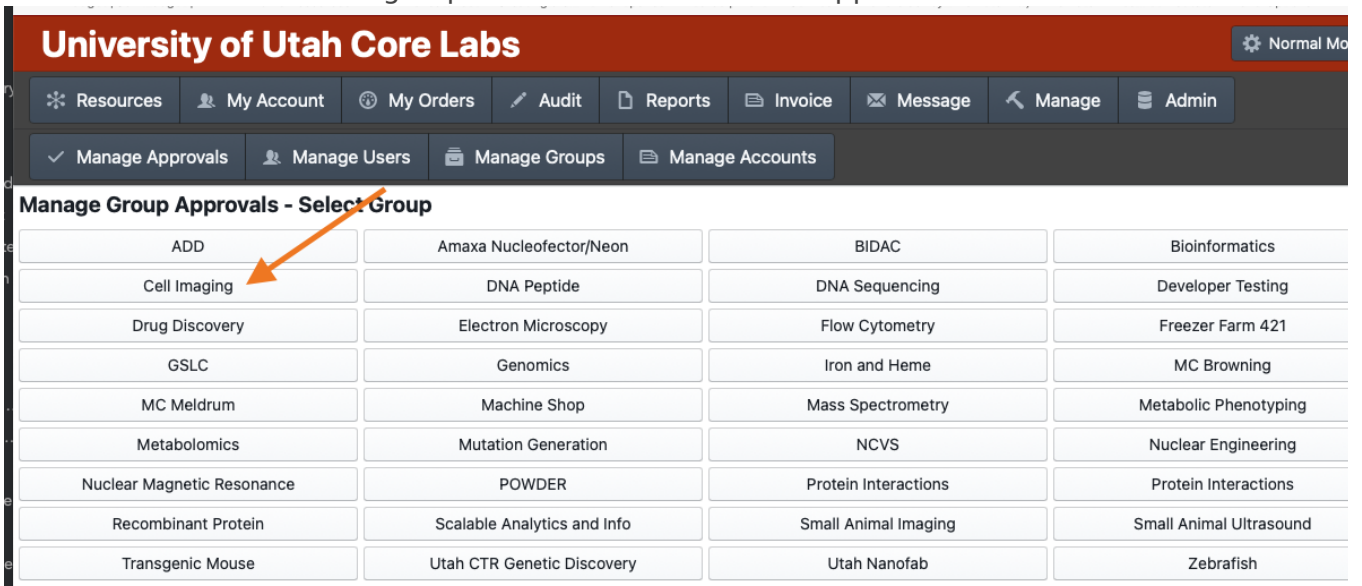
1. Click on the "Manage" icon in the top bar



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

Aldo Eduardo Garcia Guerrero

\$

Pew Unraveling Organelle Function - 5100E

PO Number

PO Number

Base Cost

Cost Modifier

Cost Multiplier

Calculated Total

\$ 6.08

\$ 0

× 1

\$ 6.08

Approve

Exclude

Lines

ID	Description	Quantity	Rate	Commercial Rate	Details
320961	<div>mKATE Rv1</div>	<div>1</div>	6.08	9.27	<div><div></div>Details/Data</div>

Line Item Add Form

Description

Quantity

Rate

Commercial Rate

Description

123 0

\$ 0

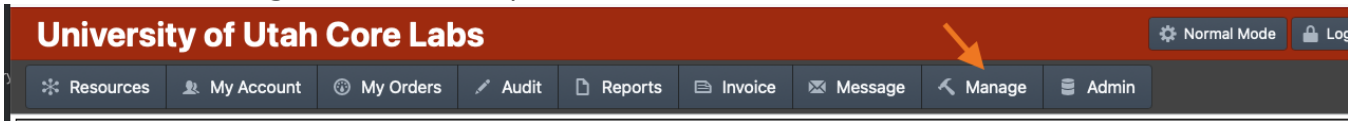
\$ 0

Add Line

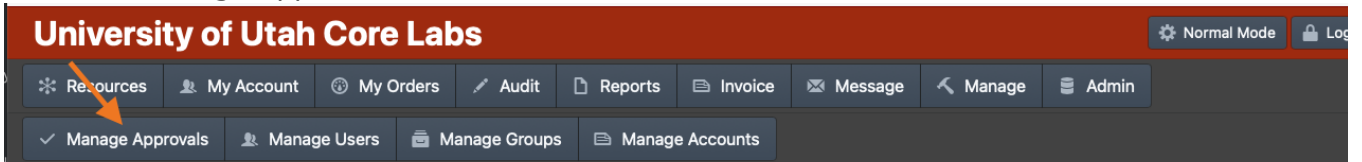
Clear Form

Batch approving orders

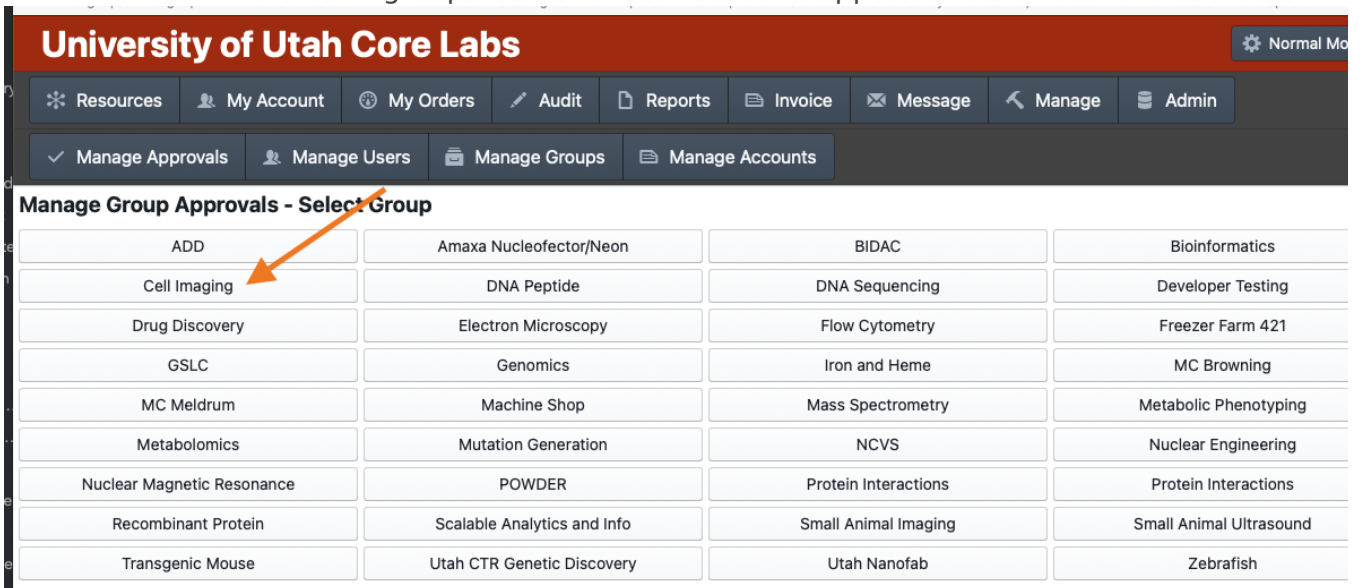
1. Click on the "Manage" icon in the top bar



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)...

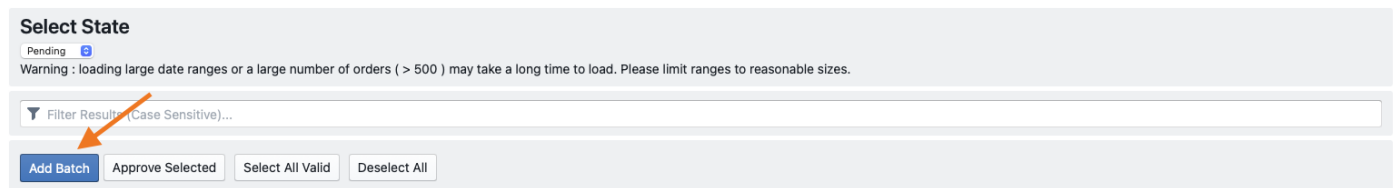
Add Batch **Cancel**  **Confirm**  **Select All Valid** **Deselect All**

	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 

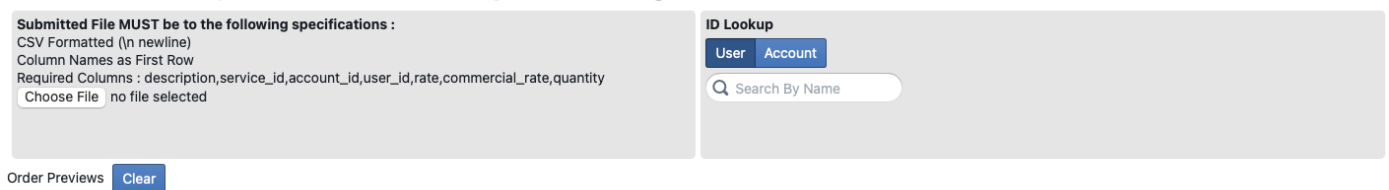
Warning : loading large date ranges or a large number of orders (> 500) may take a long time to load. Please limit ranges to reasonable sizes.

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

UserAccount

Q

Search By Name

Order Previews

Clear

Test Line ItemsDeveloper Test Dummy AccountElliot Francis

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

Order Total : \$10

Test Line ItemsDeveloper Dummy Account - CommercialElliot Francis

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

Order Total : \$100

Test Line ItemsThe Genetic Analysis of Mitochondrial Iron Metabolism - 59300599Elliot 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

UserAccount

Q

Search By Name

Order Previews

Clear

Test Line ItemsDeveloper Test Dummy AccountElliot Francis

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


Order Total : \$10

Test Line ItemsDeveloper Dummy Account - CommercialElliot 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.

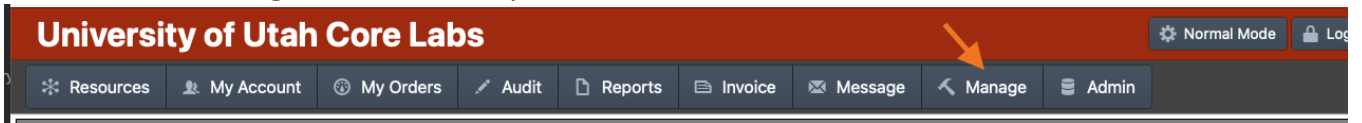
 Filter Results (Case Sensitive)...

Add Batch Approve Selected Select All Valid Deselect All

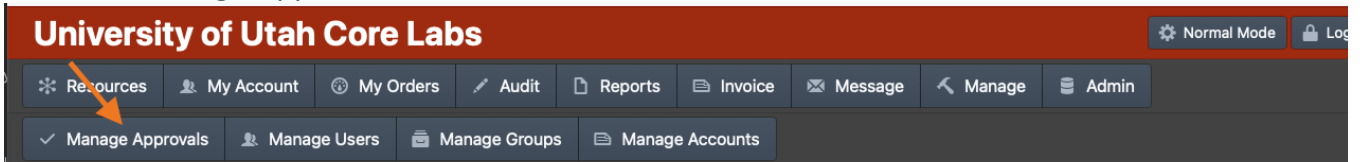
	Status	Order	Total (\$110.00)	Date	Service
<input type="checkbox"/>	Pending	305300	\$10.00	2021-04-09	Test Line Items
<input type="checkbox"/>	Pending	305301	\$100.00	2021-04-09	Test Line Items

Altering an order

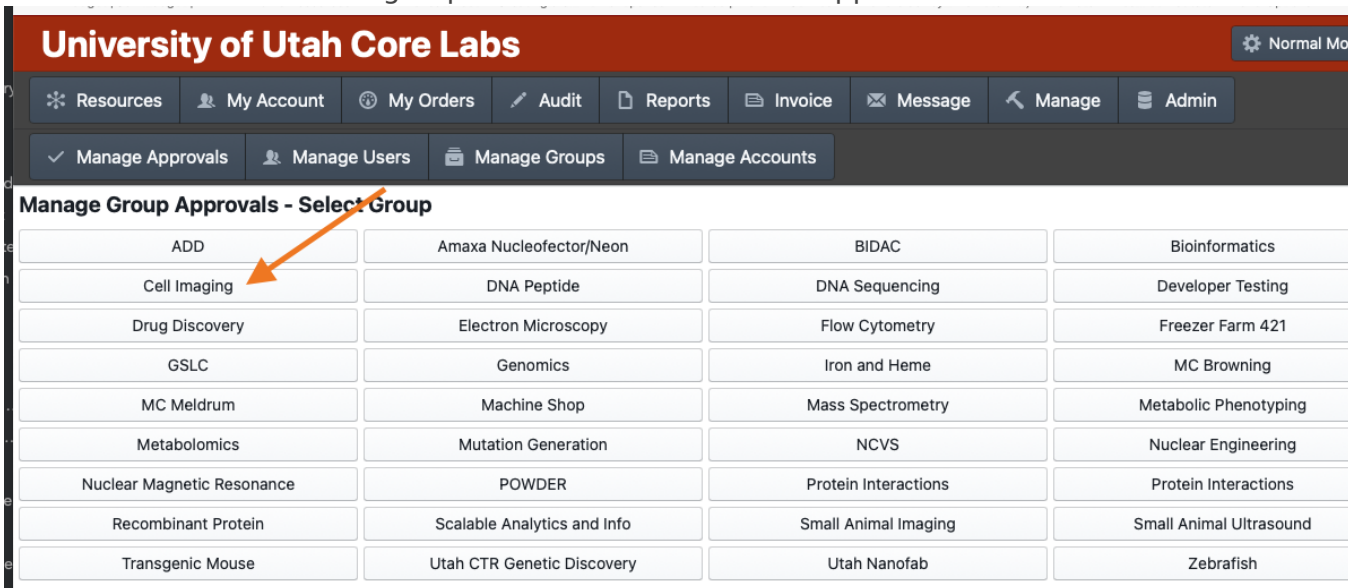
1. Click on the "Manage" icon in the top bar



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

1

2

PO Number

Base Cost Cost Modifier Cost Multiplier Calculated Total

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	Details/Data

Line Item Add Form

Description	Quantity	Rate	Commercial Rate
<input type="text" value="Description"/>	<input type="text" value="123 0"/>	<input type="text" value="\$ 0"/>	<input type="text" value="\$ 0"/>

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

 Elliot Francis



 Developer Test Dummy Account



PO Number :

Order Date : 2021-04-08

Order Lines

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

Vendor Price

Add Line

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

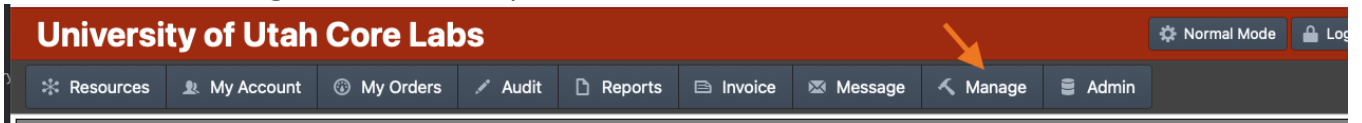
Reset Form

Submit

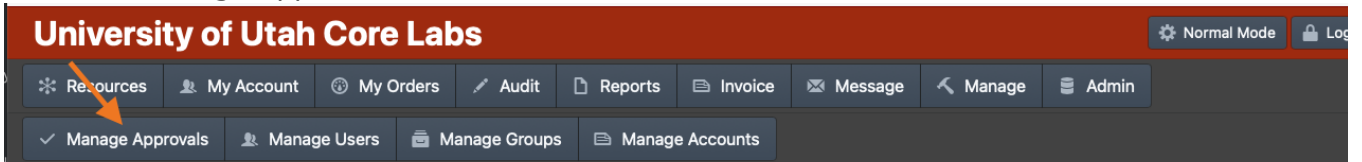
Cancel

Excluding an order

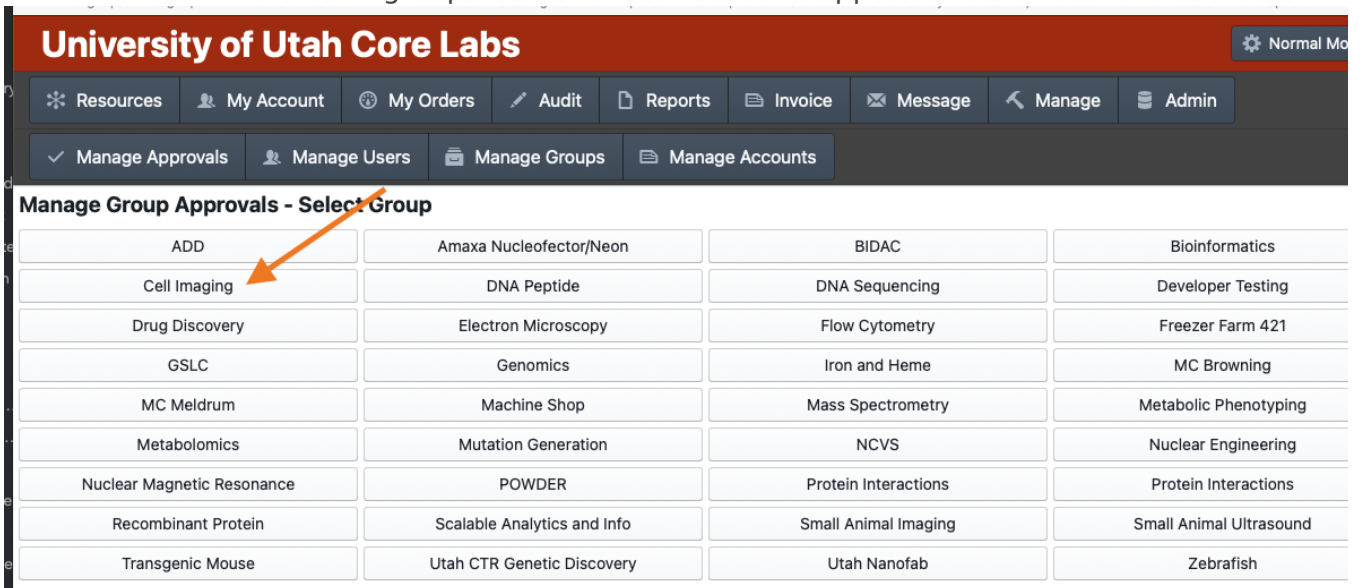
1. Click on the "Manage" icon in the top bar



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

Minna Roh-Johnson

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

PO Number

PO Number

Base Cost

\$ 136.50

Cost Modifier

\$ 0

Cost Multiplier

× 1

Calculated Total

\$ 136.50

Approve

Exclude

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	<div>Details/Data</div>

Line Item Add Form

Description

Description

Quantity

123 0

Rate

\$ 0

Commercial Rate

\$ 0

Add Line

Clear Form

304916

\$00.00

2021-02-05

Leica S.P. Confocal 488-488-501-553 Leica Rm 1490

Elizabeth Chalkman (Mary Becker)