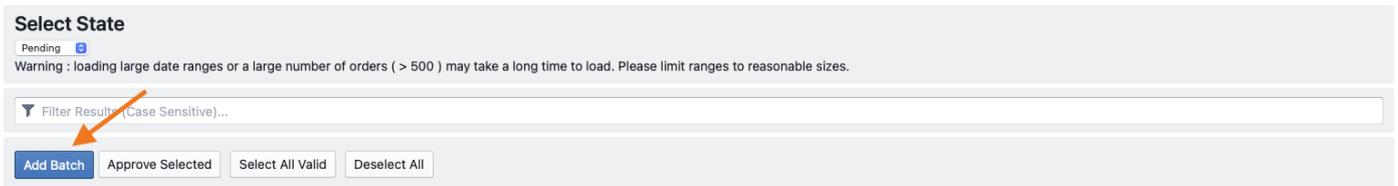


Adding a line item order batch

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 3

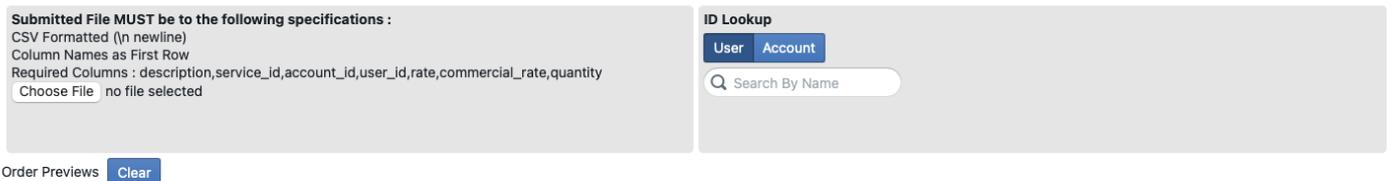
Warning : loading large date ranges or a large number of orders (> 500) may take a long time to load. Please limit ranges to reasonable sizes.

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
 test_batch_order.csv

ID Lookup

Order Previews

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

Order Total :

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

Order Total :

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

Order Total :

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
 test_batch_order.csv

ID Lookup

Order Previews

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

Order Total :

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

Order Total :



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

Revision #3

Created 1 April 2021 15:12:31 by Elliot Francis

Updated 9 April 2021 15:54:31 by Elliot Francis