

Help Document / Training Tutorial

Creating a Soil Test / Target Sample Work Order

1. Open Work Order Tab.

A. With I.F.A.R.M.'s main page open, expand the customer profile to show all customers / growers.
Users can right click on the customer / grower and select Expand All to drop down all fields (right).

(W)	Map Data Export File Upload Work Orders Reports	
Search Filter	Tools •	
Filter Profiles Has Data Set Matching Filters Name:		
Filter	ALL A	dd Farms
Filter Data Sets	Bor E	plapse All
01/01/2013 🖻 to 08/08/2013 🖻 V V V 🚇 V 🧐 V V V 1	B B Co> Fa B B Dar S	rm Management Report ample Summary Report
V 9 V 2 V T V & V Q		ove To
Clear Checked	⊕ GO	efresh
 	E-1600 Nor	

B. Click on the Work Order Tab. The work order page will appear.

Map Data Export	File Upload	Work Orders	Reports
Tools 🖌 📃 📃			



C. Once opened, notice the default template is the Soil Test option. The Order Form will display.

×	Map Data	Spread Map Data Upload Data Export File Upload Target Samples Work Orders
Search Filter	Order Form	Order Manager Dispatch Manager
Filter Profiles ☐ Has Data Set Matching Filters ☑ Name: USI Training & Testing ☐ Filter	User:	V Remove Selected
Filter Data Sets	Account	Farm
Most Recent Only Samples Due Only		
🔲 01/01/2015 🔤 to 09/29/2015 🔄		Eleid 1
V 🖤 V 🙆 V 🕺 V V V 🗓		
V S V 2 V T V 8 V B	Saver Setups:	×
V N V 🕒 V P V W	Order Types:	Soil Onematodes Only
	/	Soil Nitrate Only
		Customer Pulled Soil Sample
Clear Checked	Soil	
Agintegrated	Results Outp	put: 🗸
AgvancePlanning	Printed Copie	ies: O Yes O No
	Export Files:	: 💿 None 💿 Shape Files 💿 Greenplan
Cedar County Coop Cory Braun	Completion:	💭 Will Call When Ready 💿 Ready Now
Farm Central	Sample Meth	hod: Retest 🔹 No field selected.
	Grid Size:	Estimated: Calculated:
🖨 🎛 Farm 1	Override Ret	etest Use Estimate
	Grid Size:	
	Season:	v
Field 4	Crop Residue	ie: 🗸
Field 5	Macro Nutrie	ent Analysis Package:
🕀 🏣 Farm 2	S1: Basic	c Package (pH, P, K, OM)
C O'Croppe, Myles	S2: Basic	c Package (S1 plus Buffer pH, Ca, Mg, CEC & Base Saturation)
https://app.ifarminc.com/main.php#		Save Setup

- D. Left click and hold on a field to be tested. Drag the field up into the account window (above).
 - It will populate the entry (below).

Remove All	Remove Selected				
Account 👞		Farm		Field	Sub-Field
Farmer, Joe		Farm 1		Field 1	MASTER
Saved Setups:		*			
Order Types:	Soil		Nematodes	s Only	
	Soil Nitrate Only		🔘 Plant Tissu	e	
	Customer Pulled S	oil Sample			



2. Selecting a Target Order / Field Options.

- A. Take notice of the test / logistic information to be filled out.
 - Go through and enter all field information required.

Soil		
Results Output:	Results & colored	pH, P, K Maps 🗸
Printed Copies:	O Yes	No
Export Files:	None	Shape Files Greenplan
Completion:	Will Call When	Ready 🔘 Ready Now
Sample Method:	Target Samples	▼ TGT - 09-29-2015 ▼ View/Define Targets
Grid Size:	Estimated:	3.3 ac Calculated: 3.1 ac
Override Retest Grid Size:	Use Estimate	×
Season:	Fall	~
Crop Residue:	Row Beans / Stu	ble 🗸
Macro Nutrient Ana	lysis Package:	
S1: Basic Package (pH, P, K, OM)		
S2: Basic Package (S1 plus Buffer pH, Ca, Mg, CEC & Base Saturation)		
S1C2: Basic Package (S1 plus S2 every 5th sample)		
◎ S8: Bundle Package (S2 plus S3 - single extraction method)		
None		

- Results Output: Use the drop down to indicate which report(s) are required.
- Printed Copies: Click button if printed / mailed copies are required.
- Export Files: Click button if data files are required to be emailed.
- **Completion**: Click a button to indicate if a field is **Ready Now**, or if it will be made ready at a later time (**Will Call**).
- **Sample Method**: Use the drop down menu to choose Target Samples. If a field pulled into the account window has a Target Sample in the profile, it will display in the drop down menu to the right. Clicking the View/Define Targets button will bring up the Target Sample tab; either displaying the field and already-set targets points, or allowing the user to set new points.
- **Grid Size**: An estimated and calculated grid size will appear (from the Target Sample).
- **Override Retest Grid Size:** If the user wishes to force in a new size grid, use the drop down and select a new grid size. The resulting work order will reflect a stamp indicating a new grid size has been chosen.
- Season: Allows you to choose the season the samples are to be pulled.
- Crop Residue: Allows you to select the crop residue of the field to be pulled.

Results Output	
Results & colored pH, P, K Maps	~
Results Only	
Results & colored pH, P, K Maps	

Sample Method

Retest	~
Retest	
Grid	
Target Samples	
Other	

Retest Drop-down

2010-09-29	~
2010-09-29	

Override Grid Size Drop Down



Season Drop-down



Crop Residue Drop-down

Corn / Stalks	~
Corn / Stalks	
Row Beans / Stubble	
Drilled Beans / Stubble	
Wheat / Stubble	
Forage / Hay	
Pasture	
Other	



3. Macro Nutrient Analysis Package.

- A. Chose a primary soil test package required.
 - Be advised that any **out of IL** state customers will have to select a **S2 Basic Package**. If a different test is required, write the request in the **Notes** area at the bottom of the work order.

4. Micro Nutrient Analysis Package.

- A. Review the micro nutrient package options.
- B. If micros are required, chose the package set or individual micros by clicking in the selection boxes.

Micro Nutrient Analysis Package:	Micros Analysis Type / Frequency:		
None	Type / Frequency: Composite 👻		
🔘 S3: Sulfur, Zinc, Iron, Manganese, Copper, Boron	Take Every 2 Samples 🗸		
🔘 S4: Zinc, Iron, Manganese, Copper, Boron			
S5: Sulfur, Zinc			
S6: Any individual or composite micronutrient			
S B Cu			
🗖 Zn 📄 Mn 📄 Fe			
S7: Sulfur, Zinc, Boron			

C. Determine the Type / Frequency of the micros. Click on the down arrow to display the options.

Micros Analysis Type / Frequency:		
Type / Frequency: Individual		
Take Every 0	0 Individual	
Composite		

Note: Users have the choice between **Individual** or **Composite** samples.

- **D.** If **Individual**, the lab will be instructed to take micro readings on every sample per the numeral entered in the **Take Every** box.
 - For example: if 1 is entered, a micro reading will be taken on every sample. If 5, a micro will be taken every 5th sample.

Micros Analysis Type / Frequency:			
Type / Frequency: Individual			
Take Every 5 Samples			



- E. If **Composite**, the lab will be instructed to take micro readings after combining soil, based on what is entered in the **Take Every** box.
 - For example: if 5 is entered, a micro reading will be taken from composited soil from samples 1 thru 5. If 10, a micro reading will be taken from composited soil from samples 1 thru 10.

Micros Analysis Type / Frequency:			
Type / Frequency:		Composite 👻	
Take Every	5	Samples 💙	
		Samples	
		Acres	

Note: Composite samples by acre is an option as well.

5. Soybean Cyst Nematode or Corn Nematode Samples.

A. Users have the option to include Soybean Cyst Nematode or Corn Nematode analysis as part of the standard soil test.

Soil Nematode Samples:				
📄 Soybean Cyst Nematode 🛛 📝 Corn Nematode				
Type / Frequency: Take Every 5	Individual Individual Composite			

- Users can choose one or both options by selecting the associated box(es).
- Once a selection box is activated, the drop down box option will become available.
- B. Choose either Individual or Composite and the frequency by entering a value in the Take Every box.

6. Soil Nitrate Samples.

A. Users have the option to include Soil Nitrate PSNT and/or Ammonium analysis as part of the standard soil test.

Soil Nitrate Samples:	
Nitrates (PSNT)	Ammonium
Type / Frequency: Ind Take Every 0 Sam * Samples taken from t	dividual v uples the standard 7" depth cannot be used to accurately produce recommendations. Show More

- Users can choose one or both options by selecting the associated box(es).
- Once a selection box is activated, the drop down box option will become available.

Type / Frequ	ency:	Individual 👻	
Take Every	5	Individual	<u>_</u>
* Samples	taken f	Composite	depth

B. Choose either Individual or Composite and the frequency by entering a value in the **Take Every** box.



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Soil Test Target Sample Work Order continued...

- *Note:* True nitrate samples are taken from a deeper depth (0"-12", 12"-24", 24"-36"). Whereas nitrate levels can be derived from the 7" cores pulled, recommendations should not be created from the test results.
- Click on the **Show More** button to get a more thorough explanation.

Show More

- An information box will appear (right). Contact I.F.A.R.M. if you have questions.



7. Notes / Instructions.

A. Users have the option to add notes to an order. Click in the notes / instruction area and type in the needed information.

Notes / Instructions:	Type information here	
--------------------------	-----------------------	--

B. The resulting work order will show any entered text.

8. Recipients.

- **A.** Users have the means to receive email order notifications and/or send test results to any number of representatives.
 - Any users tied to the location / customer's profile will have their email address displayed.
 - Simply click on those email addresses results are to be sent.

Recipients	
Name Kame Email	
gfisher@unitedsoils	nc.com
Customer edgar@email.com	
	•
Add Contacts	

- **B.** Users can also enter new contacts by clicking on the **Add Contacts** button.
 - **Note:** Clicking New Contact multiple times will produce multiple contact entries (right).

Add Contacts		×
Name:		
Email:		- 8
_		
Name:		
Email:		
ontacts	New Contact Save Cancel	



- An Add Contacts display will appear. Enter the Name and Email address.
- Click on Save to add the new contact. Note it will be highlighted in yellow.
- The new contact information will display from this point on in the recipients section.

Add Contae	ali c ts har@unitedacilain.com	×
Name:	Greg Ikins	1
Email:	agronomist@unitedsoilsinc.com	
	New Contact Save Cancel	

Recipients		
	Name 🔺	Email
V	Gary Fisher	gfisher@unitedsoilsin.com
	AgIntegrated	santo@agintegrated.com
	Greg Ikins	agronomist@unitedsoilsinc.com
_		

- C. Any manually entered contact can be edited or deleted.
 - Right click on the address and you will get an edit or delete option.
 - Clicking Edit will bring up the contact box to change the information.
 - **Delete** will remove the contact.

9. Text Recipients.

A. Users can also program in order status updates via a cell phone.

- Text Recipients			
Name 🔺	Phone Number		
Gary Fisher	815-383-7502		
Add Contacte			

B. To add a contact and cell phone number, click on the Add Contacts button. An Add Contacts display will appear. Enter the Name, phone number, and use the drop down menu to choose the cell phone service provider.

Add Contac	ts	×
Name:	Joe Farmer	
Number:	815-555-7543	
Carrier:	Verizon	~
New Contact Save Cancel		

- C. Click on Save to add the new contact.
- D. The new contact information will display from this point on in the recipients section.

	Name 🔺	Phone Number
[Gary Fisher	815-383-7502
[Joe Farmer	815-555-7543

Edit	
Delete	



- E. If a contact ever needs to be removed, right click on the name. A drop down will appear give the option to Edit or Delete. Clicking Edit will bring back the Add Contacts interface so you can change any information for the contact.
- **F.** Clicking **Delete** will bring up a prompt to verify you want to remove the contact. Click Yes to remove the contact. It will disappear immediately.



10. Scheduling An Order.

- A. Once all order parameters are entered, it is highly suggested you go back through and check the order.
- B. If accurate, click on the Schedule Order button.

Recipients						
	Name 🔺	Email				
	Gary Fisher	gfisher@unitedsoilsin.com				
	AgIntegrated	santo@agintegrated.com				
	Greg Ikins	agronomist@unitedsoilsinc.com				
Add Contacts						
Schadula Order						

- **C.** A brief indicator will appear showing the order is being scheduled.
 - If any needed test information is missing, I.F.A.R.M. will highlight specific areas on the order form that need attention.
 - The order will not process unless all required test information is entered.
- D. Once finished, a confirmation message will appear stating the order was completed.

Success	×
Order was successfully scheduled. Would you like to clear the fo	rm?
ot be used to accurate Yes No	

E. The prompt will ask you if you want to clear the form. If Yes, the process starts all over, with a clean form.



- F. If you want to make an identical order with a different field, click No.
 - All the current order parameters will remain.
 - Users can remove the existing field and pull in a different field.
 - If all tests are the same, this process can be repeated quickly, entering many fields in short order.
- G. If the cell phone contact was selected, a text message will appear through their text messaging.

```
FRM:support@usifarm.com
MSG:
Work Order Update: Order #2511 is updated to Ordered.
```

10. Save Setup.

A Saved Setup is a process by which a user can save all the parameters for a given soil test order, and select that setup to populate order options (without selecting everything over and over again).

A. Once a particular order is fully populated, remove the Field that started the process by clicking the **Remove All** or **Remove Selected** buttons

Saved Setups: 3.3 Target Sample Test S2 Fall E							
Order Types:	Soil Onematodes Only						
	Soil Nitrate Only Plant Tissue						
	Customer Pulled Soil Sample						
Soil							
Results Output:	Results & colored pH, P, K Maps						
Printed Copies:	O Yes O No						
Export Files:	None Shape Files Greenplan						
Completion:	Will Call When Ready Ready Now						
Sample Method:	Target Samples View/Define Targets						
Grid Size:	Estimated: Calculated:						
Override Retest Grid Size:	3.3 ac 💌						
Season:	Fall 🗸						
Crop Residue:	Row Beans / Stubble						
Macro Nutrient A	nalysis Package:						
S1: Basic Package (pH, P, K, OM)							
S2: Basic Package (S1 plus Buffer pH, Ca, Mg, CEC & Base Saturation)							
S1C2: Basic P	S1C2: Basic Package (S1 plus S2 every 5th sample)						
◎ S8: Bundle Package (S2 plus S3 - single extraction method)							
O None							

Note: Setups should be created for standard testing options; those that will represent most of soil tests put on order. Multiple setups can be created to reflect gridded orders, retest orders, tests with specific micro packages, tests for specific customers, specific crops, etc.



B. With just the test options selected, go the Save Setup button and select it.



C. A naming prompt will appear. Enter a name for the setup. The setup name should be descriptive, so it is easily recognized and understood what it represents (i.e. Test 2 Grid 2.5 No Micros; Retest Test 1 Micros S B). Click Ok when finished.



D. A brief status bar will display showing the setup is being saved, then an indicator will appear stating the setup has been saved (left).

Success X	Saved Setups:	
Setup successfully saved.	Order Types:	3.3 Target Sample Test S
		Retest 3.3 grid Spring Te
		Test 2 2.5 Grid Corn
Close		

- E. To verify the setup is available, go to the top of the order page and click on the **Saved Setups** drop down arrow (upper right).
- **F.** The next time an order with these options is required, simply select the Saved Setup, bring in a field and click on the **Schedule Order** button.
- **G.** To **Delete** a setup, open the work order page, open a given setup, then click on the **Delete Setup** button at the bottom of the page (left). An indicator will appear to confirm the deletion of the setup (right).







Fall B...



11. Work Order Packet.

Users can view their work orders through the Order Manager (see Order Manager section).

A. A retest work order packet will display the following:

