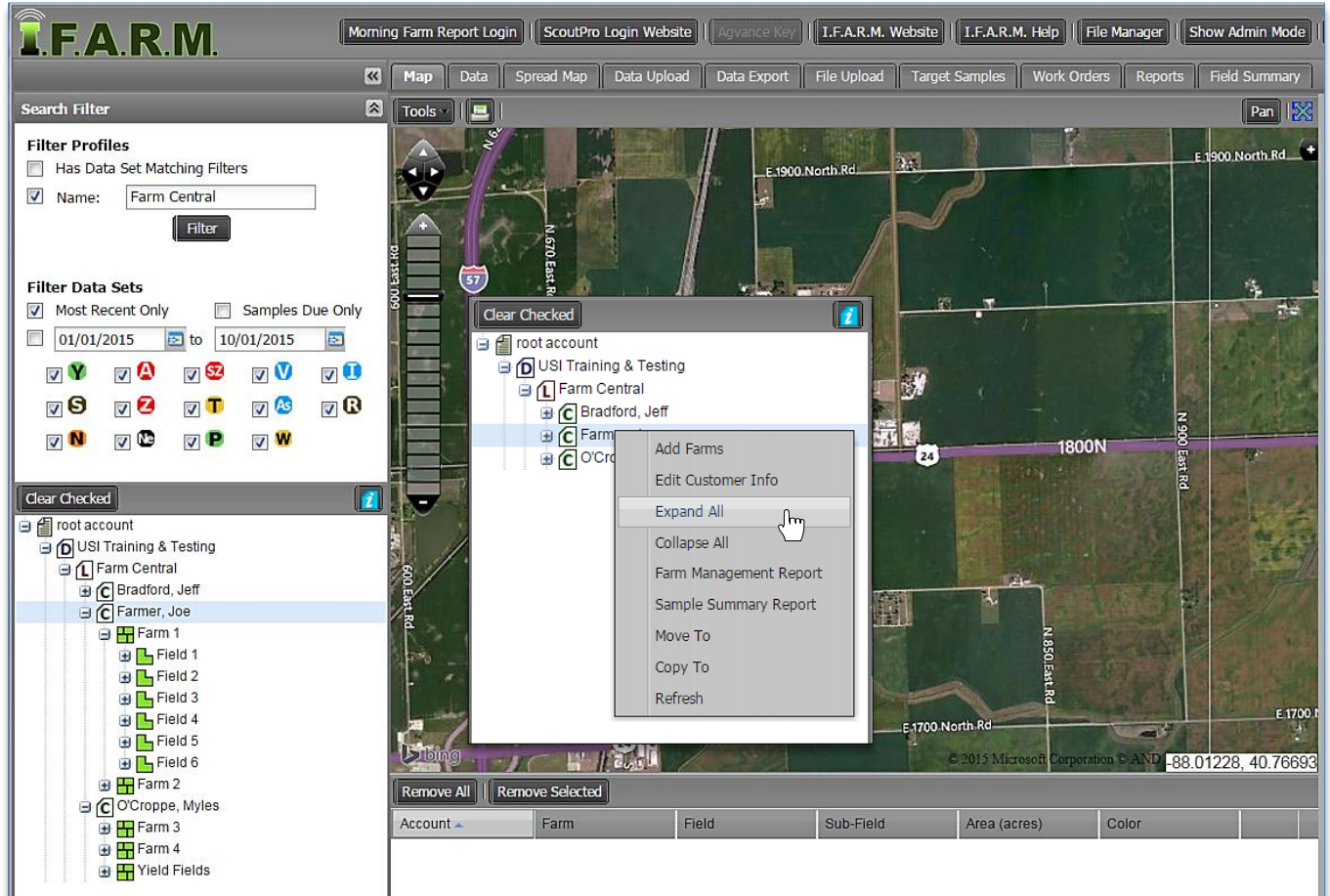# Help Document / Training Tutorial

Existing Fields - Creating Customer Pulled / Loose Soil Test Work Orders
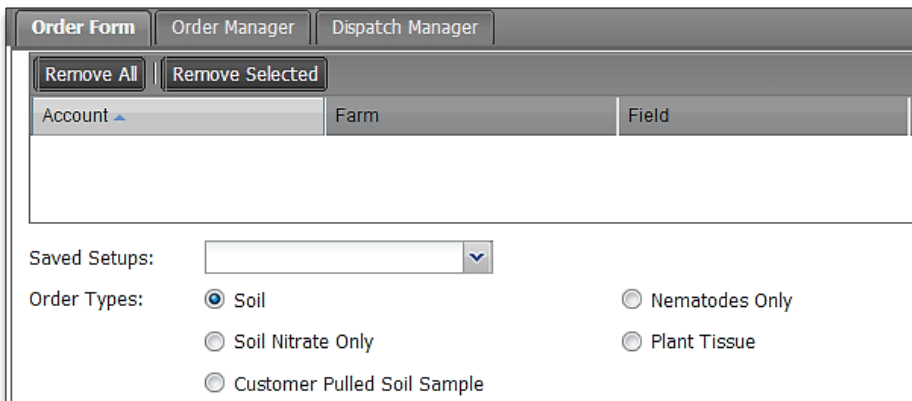
1. **Open Work Order Tab.**

   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 (inset).

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

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

Existing Fields - Customer Pulled Soil Test Work Orders continued…

> **D.** In the **Order Types** options, click on the **Customer Pulled Soil Sample** button. Note how the order details change, and the available test options.

- **Order Status:** Choose **At Lab** if samples have already been collected and delivered to the lab; or **Pending** if the samples are to be picked up or are in transit to the lab.

- **Printed Copies:** Choose whether printed hardcopy reports are needed (mailed).

- **Selected Field:** Pull in existing fields or create new fields. *Covered on pages 3-5.*

- **# of Samples:** Enter the number of samples pulled / submitted. *Covered on pages 3-5.*

- **Macro Nutrient Package:** Choose one of the standard package options. *Out of state testers will get a test two automatically. Covered on page 6.*

- **Micro Nutrient Package:** Choose one of the standard package options. Indicate if the micros are individual or composited (and how many per sample). *Covered on page 6-7.*

- **Soil Nematode Samples:** If nematode testing is desired, choose one of the crop options; plus if they are to be individual or composited (and how many per sample). *Covered on page 7.*

- **Soil Nitrate Samples:** If a soil nitrate or ammonium test is desired, choose one or both of the options, and whether they are to be individual or composited (and how many per sample). *Covered on page 7-8.*

It should be mentioned… to get the full value from Soil Nematode or Nitrate testing, dedicated tests for each should be performed.

Existing Fields - Customer Pulled Soil Test Work Orders continued…

· **Recommendations (Optional):** If recommendations are required from the tested soil, clients can choose the crops and yield goals to help generate the values.

2. **Loading Fields.**

   Users can enter fields three different ways in the Customer Pulled ordering system:

   A. **Pull in existing fields** *(addressed in this tutorial).*

   B. **Create new fields in the tree and pull them in** *(reference New Profile Fields tutorial).*

   C. **Create new fields through the process of making orders** *(reference New Process Fields tutorial).*

   * The customer pulled order system is designed to accept up to 10 fields under a grower's farm in a single order session.

3. **Loading Individual 'Existing Fields'.** (Existing geo-referenced fields).

   A. Left click and hold onto a field and drag up into the account window and release the mouse button.

   B. The field information will display in the window.

Existing Fields - Customer Pulled Soil Test Work Orders continued…

C. The field information will also display in the field window of the order system.

D. Click in the # of Samples box and enter in the number of samples pulled from the field.

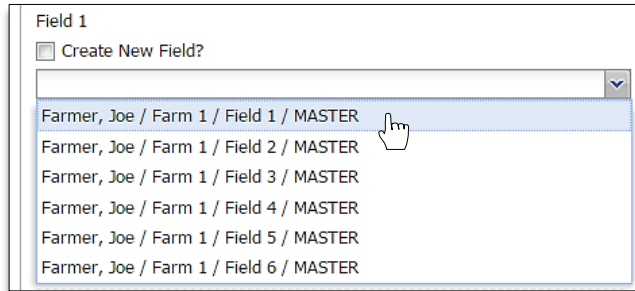4. **Loading Multiple Existing Fields.** (Existing geo-referenced fields).
   B. Left click and hold onto a field and drag up into the account window and release the mouse button.
   C. Users can pull in multiple fields under a grower's farm in this manner.
   D. An entire Farm can be pulled into the account window as well.

E. Whether individual, or by a farm, multiple fields will appear in the account window.

Account ▲	Farm	Field	Sub-Field
Farmer, Joe	Farm 1	Field 6	MASTER
Farmer, Joe	Farm 1	Field 5	MASTER
Farmer, Joe	Farm 1	Field 4	MASTER

I.F.A.R.M.

Existing Fields - Customer Pulled Soil Test Work Orders continued…

F. To make all fields visible in the order system, start with Field 1. Click on the drop down menu to see all fields entered in the account window (left).
- Click on the first field and it will populate in the entry window (right).
- Enter the number of samples that were taken in that field (right).

Field 1
- [ ] Create New Field?

Farmer, Joe / Farm 1 / Field 1 / MASTER
Farmer, Joe / Farm 1 / Field 2 / MASTER
Farmer, Joe / Farm 1 / Field 3 / MASTER
Farmer, Joe / Farm 1 / Field 4 / MASTER
Farmer, Joe / Farm 1 / Field 5 / MASTER
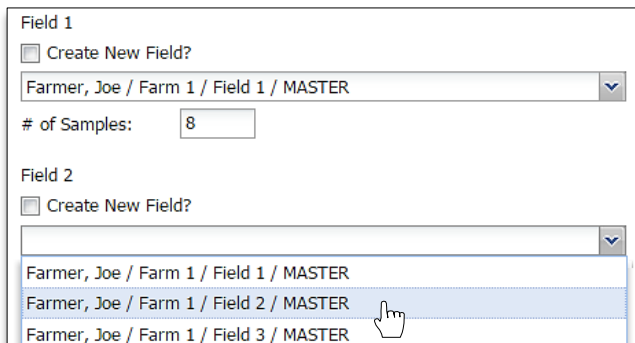Farmer, Joe / Farm 1 / Field 6 / MASTER

Field 1
- [ ] Create New Field?

Farmer, Joe / Farm 1 / Field 1 / MASTER
# of Samples: 8

Add Field   Remove Last Field

G. To enter additional fields, click the **Add Field** button. A new Field 2 will display.
- Click on the second field and it will populate in the entry window (right).
- Enter the number of samples that were taken in that field (right).

Field 1
- [ ] Create New Field?

Farmer, Joe / Farm 1 / Field 1 / MASTER
# of Samples: 8

Field 2
- [ ] Create New Field?

Farmer, Joe / Farm 1 / Field 1 / MASTER
Farmer, Joe / Farm 1 / Field 2 / MASTER
Farmer, Joe / Farm 1 / Field 3 / MASTER

Field 2
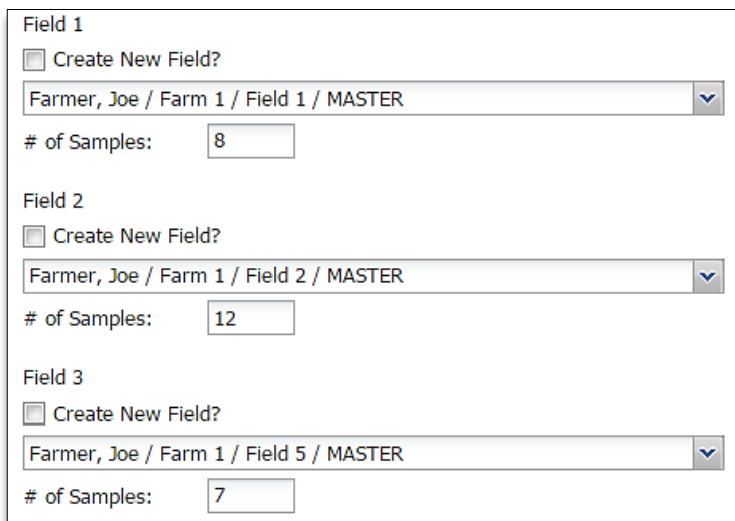- [ ] Create New Field?

Farmer, Joe / Farm 1 / Field 2 / MASTER
# of Samples: 12

Add Field   Remove Last Field

H. Continue in this manner until all fields are selected.
   Note: The system is limited to 10 fields in a single order session.

Field 1
- [ ] Create New Field?

Farmer, Joe / Farm 1 / Field 1 / MASTER
# of Samples: 8

Field 2
- [ ] Create New Field?

Farmer, Joe / Farm 1 / Field 2 / MASTER
# of Samples: 12

Field 3
- [ ] Create New Field?

Farmer, Joe / Farm 1 / Field 5 / MASTER
# of Samples: 7

Existing Fields - Customer Pulled Soil Test Work Orders continued…

5. **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 an **S2 Basic Package**. If a different test is required, write the request in the **Notes** area at the bottom of the work order.

Macro Nutrient Analysis 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

6. **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:
- ○ None
- ○ S3: Sulfur, Zinc, Iron, Manganese, Copper, Boron
- ○ 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

Micros Analysis Type / Frequency:
Type / Frequency: Composite
Take Every 2 Samples

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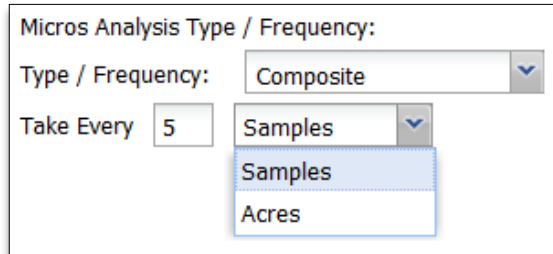
Micros Analysis Type / Frequency:
Type / Frequency: Individual
Take Every 5 Samples

Existing Fields - Customer Pulled Soil Test Work Orders continued…
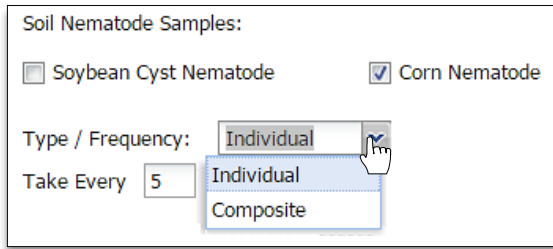
    E. If **Composite**, the lab will be instructed to take micro readings after combining soil, based on what is entered in the **Take Every** box.

- 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.

7. 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

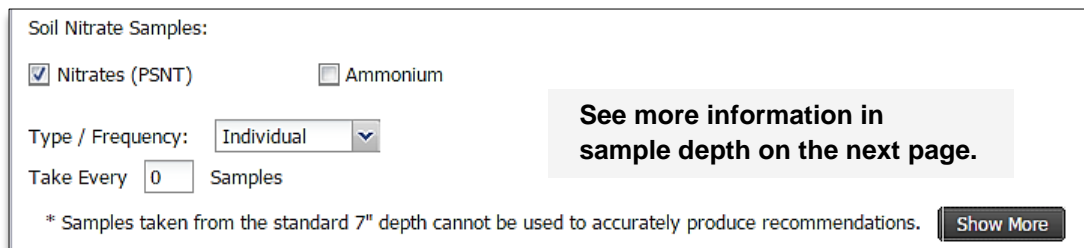|	
Type / Frequency:	Individual ▼
Take Every 5	Individual
	Composite

Note: Be mindful that corn nematode soil samples should ideally be taken during the early corn growing season, including corn root material, and handled very carefully. Please call the USI office with questions, or use the Corn Nematode testing option for specific field testing.

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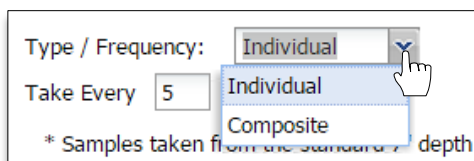- Once a selection box is activated, the drop down box option will become available.

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

8. 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:	Individual ▼
Take Every 0	Samples

* Samples taken from the standard 7" depth cannot be used to accurately produce recommendations. [Show More]

See more information in sample depth on the next page.

- 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 / Frequency:	Individual ▼
Take Every 5	Individual
	Composite

* Samples taken from the standard 7" depth

    B. Choose either Individual or Composite and the frequency by entering a value in the **Take Every** box.
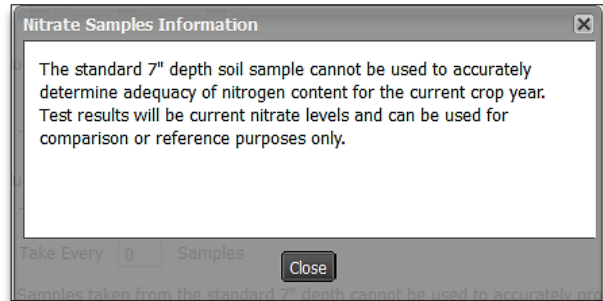
Existing Fields - Customer Pulled Soil Test Work Orders continued…

> **Note:** True nitrate samples are taken from a deeper depth (0"-12", 12"-24", 24"-36"). Whereas nitrate levels that are derived from the 7" cores pulled, recommendations should not be created from 7" test results.

- Click on the **Show More** button to get a more thorough explanation. Show More
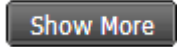
- An information box will appear (right). *Contact I.F.A.R.M. if you have questions, or use the Soil Nitrate order option to enter a specific Nitrate / Ammonium work order.*

Nitrate Samples Information

The standard 7" depth soil sample cannot be used to accurately determine adequacy of nitrogen content for the current crop year. Test results will be current nitrate levels and can be used for comparison or reference purposes only.

Take Every 0   Samples   Close

9. **Recommendations (Optional):** If recommendations are required from the tested soil, clients can choose the crops and yield goals to help generate the values.
   A. Click on the corresponding box for the crop. Use the drop-down menu to choose the crop(s). Enter the yield goals for each crop.

Recommendations:

	Crop:		Yield:	
☑	Beans	▼	75	bu/ac
☑	Corn	▼	180	bu/ac
☐		▼		
☐		▼		

10. **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.

Existing Fields - Customer Pulled Soil Test Work Orders continued…

11. 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.
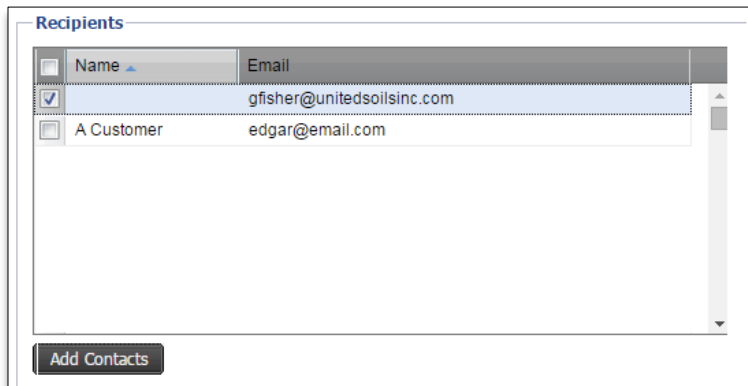
   B. Users can also enter new contacts by clicking on the **Add Contacts** button.

     Note: Clicking New Contact multiple times will produce multiple contact entries (right).
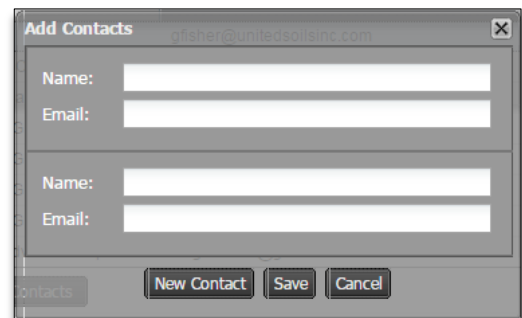
     - An **Add Contacts** display will appear. Enter the **Name** and **Email** address.

     - 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.
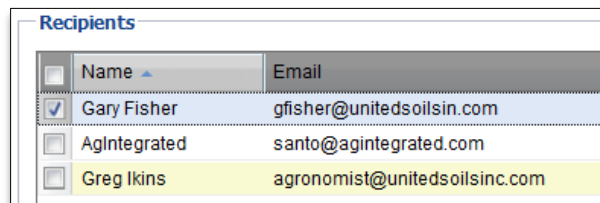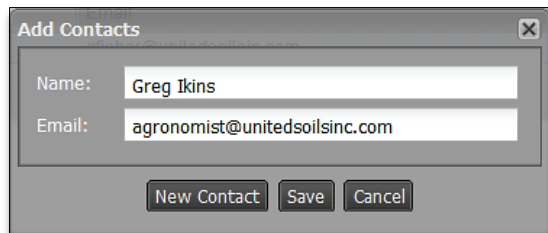
   C. Any manually entered contact can be edited or deleted.

     - 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.

Existing Fields - Customer Pulled Soil Test Work Orders continued…

12. Text Recipients.

   **A.** Users can also program in order status updates via a cell phone.
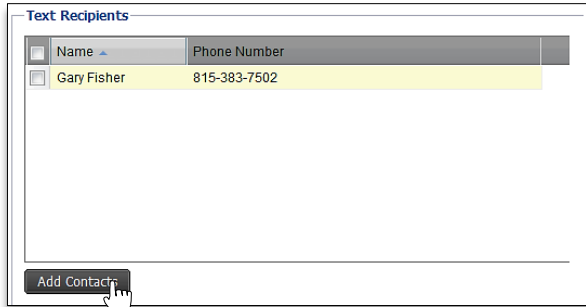
    B. To add a contact and cell phone number, click on the **Add Contacts** button. An **Add Contacts** display will appear. Enter the **Name**, **phone number**, and use the drop down menu to choose the cell phone **service provider**.
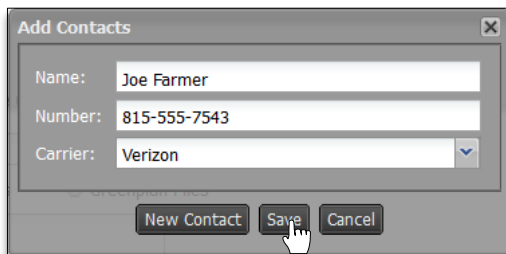

    C. Click on **Save** to add the new contact.

    D. The new contact information will display from this point on in the recipients section.
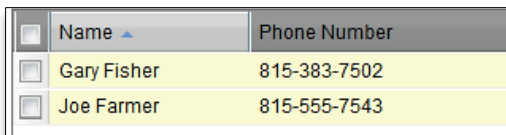
    E. If a contact ever needs to be removed, right click on the name. A drop down will appear give the option to **Edit** or **Delete**. Clicking **Edit** will bring back the Add Contacts interface so you can change any information for the contact.

    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.
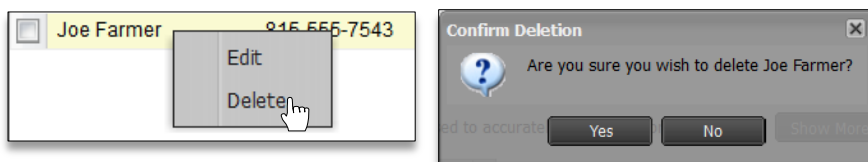
Existing Fields - Customer Pulled Soil Test Work Orders continued…

13. **Scheduling An Order.**

    A. Once all order parameters are entered, **thoroughly verify all specifics of the order**..

    B. If accurate, click on the **Schedule Order** button.
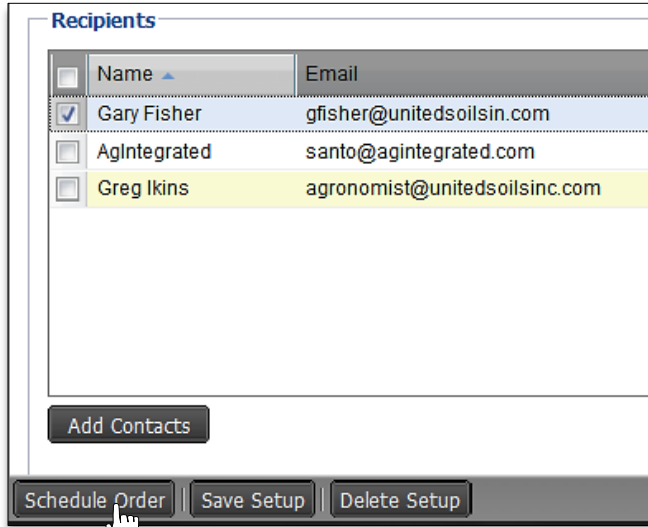
    C. A brief indicator will appear showing the order is being scheduled.
      - If any needed test information is missing, I.F.A.R.M. will highlight specific areas on the order form that need attention.
      - The order will not process unless all required test information is entered.

    D. Once finished, a confirmation message will appear stating the order was completed.
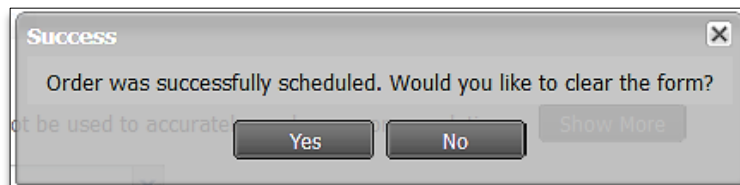
    E. The prompt will ask you if you want to clear the form. If **Yes**, the process starts all over, with a clean form.

    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 email & cell phone contact options were selected, an email and text message will be sent, notifying the status of the new order(s).
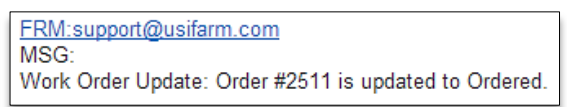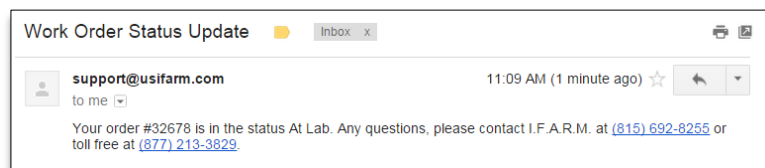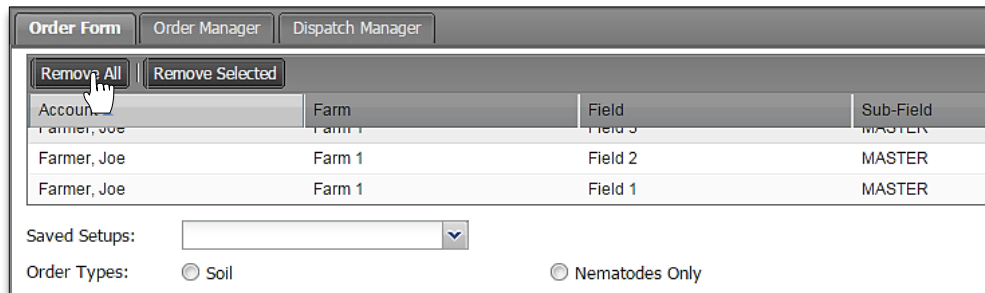
Existing Fields - Customer Pulled Soil Test Work Orders continued…

14. 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 future orders using the same 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

Order Form	Order Manager	Dispatch Manager	

Remove All	Remove Selected		
Account	Farm	Field	Sub-Field
Farmer, Joe	Farm 1	Field 3	MASTER
Farmer, Joe	Farm 1	Field 2	MASTER
Farmer, Joe	Farm 1	Field 1	MASTER

Saved Setups: [▼]

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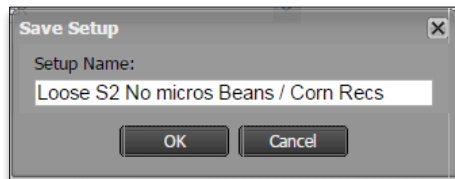
Note: Setups should be created for standard testing options; those that will represent most of soil tests put on order. Multiple setups can be created to reflect gridded orders, retest orders, tests with specific micro packages, tests for specific customers, specific crops, etc.

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

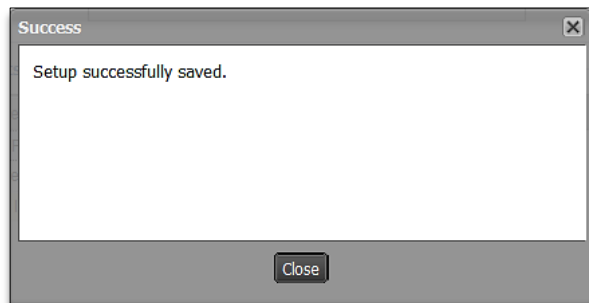| Schedule Order	Save Setup	Delete Setup

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.

Save Setup ✕

Setup Name:

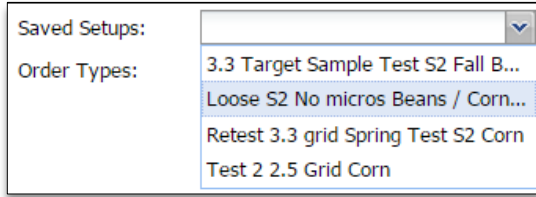| Loose S2 No micros Beans / Corn Recs |
|---|

OK	Cancel

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 ✕

Setup successfully saved.

Close

Existing Fields - Customer Pulled Soil Test Work Orders continued…

E. To verify the setup is available, go to the top of the order page and click on the **Saved Setups** drop down arrow.

Saved Setups:	▼
Order Types:	3.3 Target Sample Test S2 Fall B…
	Loose S2 No micros Beans / Corn…
	Retest 3.3 grid Spring Test S2 Corn
	Test 2 2.5 Grid Corn

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).

Schedule Order | Save Setup | Delete Setup

Delete Setup

Are you sure you want to delete "Test 2 Grid 2.5 No Micros"?

OK   Cancel

- Click **OK** to delete the setup.
- A confirmation indicator will display stating the setup has been deleted (below).

Success

Setup successfully deleted.

Close
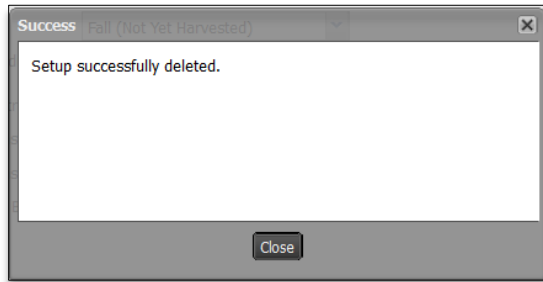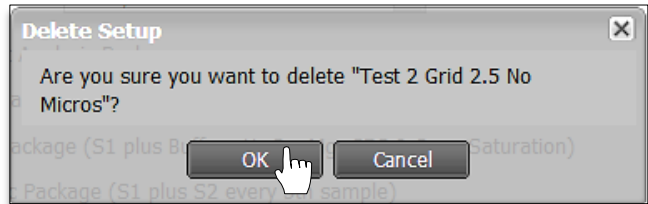
15. **Work Order Packet.**

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

A. A new loose work order packet will display the following: