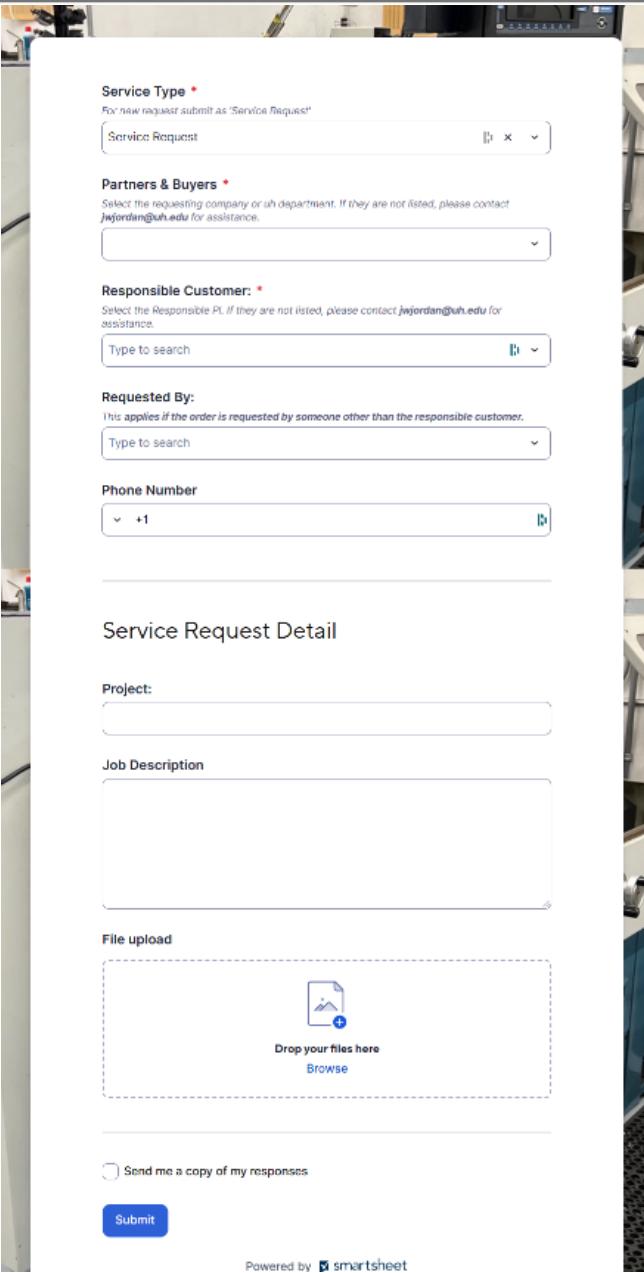
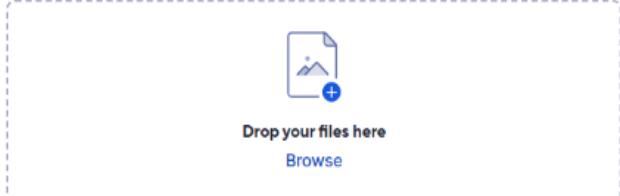
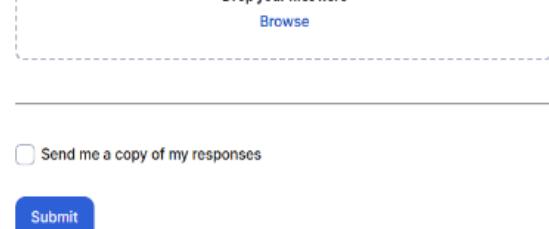
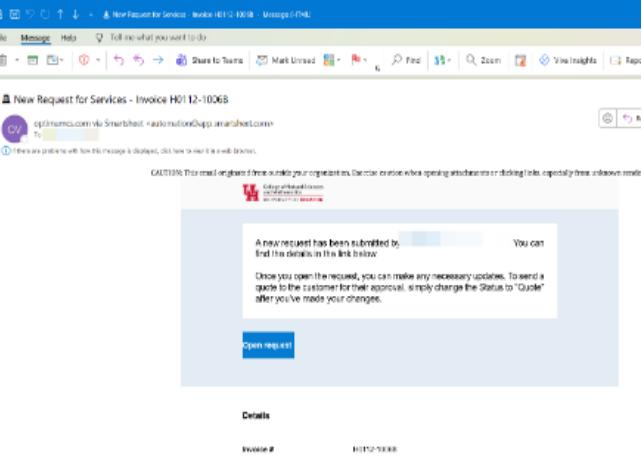
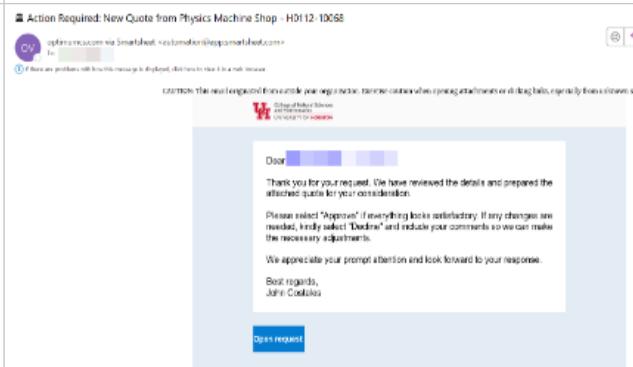


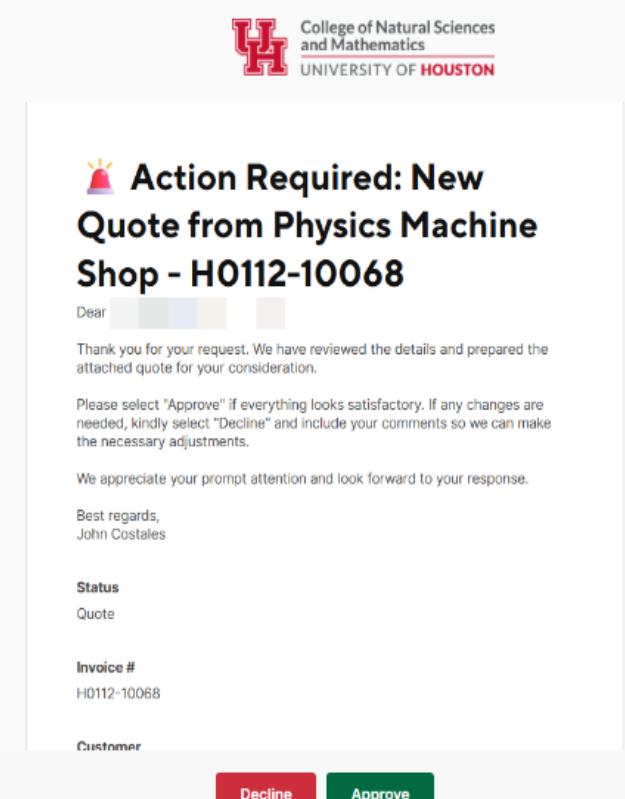
Physics MS Invoicing Guide

Step/Description	Snippet	Outcome/Result
<p><input checked="" type="checkbox"/> Faculty (Requestor)</p> <p><input checked="" type="checkbox"/> Submit Form Data</p> <p>Open the form from Microsoft Teams and fill out all of the required fields.</p> <ul style="list-style-type: none">- All new requests should have a Service Type of "Service Request"- Partners & Buyers should be your department- Responsible Customer should be the relevant PI- Phone Number should be the requester's phone number- Project should be the associated project's name- Job Description should contain any additional details for the job- If you have any files to add, those go under File Upload <p>Click "Submit" to submit your request.</p>		

Step/Description	Snippet	Outcome/Result
Service Type	<p>Service Type * <i>For new request submit as 'Service Request'</i></p> <div data-bbox="825 169 1438 204"> <input type="text" value="Service Request"/> [i] x ▾ </div>	All new requests should have a Service Type of "Service Request".
Partners & Buyers	<p>Partners & Buyers * <i>Select the requesting company or uh department. If they are not listed, please contact jwjordan@uh.edu for assistance.</i></p> <div data-bbox="825 332 1438 621"> <input type="text"/> [▼] </div> <p>UH Physics UH TcSUH UH Engineering Technology UH College of Technology UH CBO, NSM</p>	Parters & Buyers should be your department.
Responsible Customer	<p>Responsible Customer: * <i>Select the Responsible PI. If they are not listed, please contact jwjordan@uh.edu for assistance.</i></p> <div data-bbox="825 714 1438 1029"> <input type="text" value="Type to search"/> [▼] </div> <p> AK Aaranyah Kandasamy akandas@cougarnet.uh.edu AS Aaron Skaria avskaria@cougarnet.uh.edu AS Aaron Smith absmith8@cougarnet.uh.edu AL Aasiyah Lakhani alakhani7@cougarnet.uh.edu </p>	Responsible Customer should be the relevant PI, selected from a list of names that will auto-populate with available users.
Phone Number	<p>Phone Number</p> <div data-bbox="825 1111 1438 1145"> [▼] +1 [i] </div>	Phone Number should be the requester's phone number.
Project	<p>Service Request Detail</p> <p>Project:</p> <div data-bbox="825 1323 1438 1357"> <input type="text" value="Project Name"/> </div>	Project should be the associated project's name.

Step/Description	Snippet	Outcome/Result
Job Description	<p>Job Description</p> <p>Details about the job should go here.</p>	Job Description should contain any additional details for the job.
File Upload	<p>File upload</p> 	If you have any files to add, those go under File Upload.
Click the "Submit" button.		This will generate a new line on the General Intake Source Sheet; the shop will be notified via email and will begin the approval process.
<p>Admin - Generating a Quote</p> <p>Generating a Quote</p> <p>When a new request is entered, an update request will be sent to a specific user in charge of reviewing invoices.</p> <p>Open that email and click on the "Open request" button to open the update request.</p>		This will open the request in your browser.

Step/Description	Snippet	Outcome/Result
<p>Make any necessary updates. When you're ready to send to the customer, change the Status field to "Quote" and hit the "Submit Update" button at the bottom of the page.</p>	 <p>New Request for Services - Invoice H0112-10068</p> <p>A new request has been submitted by bzientara@optimumcs.com. You can find the details in the link below.</p> <p>Once you open the request, you can make any necessary updates. To send a quote to the customer for their approval, simply change the Status to "Quote" after you've made your changes.</p> <p>Invoice # H0112-10068</p> <p>Status Service Request</p> <p>Customer bzientara@optimumcs.com</p> <p>Requested By</p> <p>Submit Update</p>	<p>This will trigger an automation that creates a PDF based on the fields filled out and a second automation that emails the contacts in the Requested By and Customer fields.</p>
<p>When the Status changes to "Quote", an approval request is sent to the contacts in the Customer and the Requested By fields.</p>  <p>The email subject is "Action Required: New Quota from Physics Machine Shop - H0112-10068". The body of the email contains a message from "Physics Machine Shop" with a "Review" button. The message reads:</p> <p>Dear [REDACTED]</p> <p>Thank you for your request. We have reviewed the details and prepared the attached quote for your consideration.</p> <p>Please select "Approve" if everything looks satisfactory. If any changes are needed, kindly select "Decline" and include your comments so we can make the necessary adjustments.</p> <p>We appreciate your prompt attention and look forward to your response.</p> <p>Best regards, John Doe</p> <p>Open request</p>		

Step/Description	Snippet	Outcome/Result
<p>When they click the "Open request" button, an update request will open and prompt them to either approve or decline.</p> <p>When the Status changes to "Approved" or "Declined", an email alert will be sent to a specific person updating them of the change.</p> <p>Generating an Invoice</p>	 <p>Service Request Update: Invoice H0112-10068</p> <p>optimus.com via Smartsheet <automation@uparamaahot.com></p> <p>If there are problems with how this message is displayed, click here to view it in a web browser.</p> <p>CAUTION: This email originated from outside your organization. Exercise caution when opening attachments or clicking links, especially</p> <p>College of Natural Sciences and Mathematics UNIVERSITY OF HOUSTON</p> <p>Service Request Update: Invoice H0112-10068</p> <p>Update: <input type="text"/> Request By: <input type="text"/> Invoice #: H0112-10068 Status: Approved</p> <p>The service request for Invoice H0112-10068 has been reviewed and is now either approved or denied. For additional information, please follow the provided link.</p> <p>General Invoicing Source Sheet</p>	<p>Their response will be saved in the Status field as either "Approved" or "Declined". This will trigger another email.</p> <p>After sending the email out, the Status will automatically be changed to "Invoice".</p>

Step/Description

When the Status changes to "Invoice", an automation will trigger and generate a PDF of the invoice.

Snippet

Physics Machine Shop
Department of Physics, College of Natural Science & Mathematics
University of Houston | Science & Research Building 1
3507 Cullen Blvd, Room 617, Houston, Texas 77204
Phone: 713 743 3550
<https://www.uh.edu/umn/physics/index.php>

Date	Invoice
Request Type	Invoice
Invoice No.	
Amount	
Due Date	Upon Receipt
Project	
Start Date	
End Date	

CLIENT DETAILS		SERVICE CENTER DETAILS	
Customer		Credit Cost Center:	
Requested By:		EC Acct. Code:	
Company	UH Physics Science and Research Building 1 3507 Cullen Blvd, Room 617 Houston, Texas 77204-5006	Job Description:	
Make Checks Payable To:	UH NSM Physics Department College of Natural Sciences & Mathematics Science & Research Building 1 3507 Cullen Blvd, Room 617 Houston, Texas 77204	Wire Transfers:	PHYSICS DEPT - \$85 UH INTERNAL DEPT - \$45 UH AFFILIATE - \$65
		Bank Name: JP Morgan Chase N.A.	UH INTERNAL DEPT - \$45 UH AFFILIATE - \$65
		ABA for Wires:	ABA for ACH:
		Account Number:	Swift Code:

DESCRIPTION	QTY/HRS	AMOUNT
PHYSICS DEPT		
UH INTERNAL DEPT		
UH AFFILIATE		
Special Tools & Materials (1)		

Outcome/Result

The invoice will be attached to the same row on the General Intake Source Sheet.

When the Status changes to "Invoice", an update request will be sent to the contacts in the Customer and Requested By fields.

Physics Machine Shop Invoice - Invoice # H0112-10006

enquiries.com via ShareSheet - enquiries@expertsurfer.com

To:  

If there are problems with this message, click here to view it in a web browser.

UH Physics
Science and Research Building 1
3507 Cullen Blvd, Room 617
Houston, Texas 77204

Thank you for entrusting the Physics Machine Shop with your project requirements and needs. Please click the "Open Request" link to find the attached invoice. Should you have any questions or concerns, please feel free to contact jccs1@uh.edu.

We appreciate your business and look forward to a successful collaboration.

Best regards,
John C. Casias

[Open request](#)

When they click the "Open request" button, an update request will open and give them the option to download the attached invoice.

Attachments

Upload Files

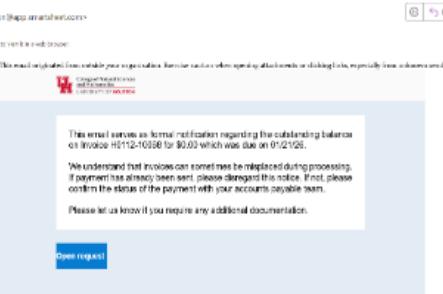
▶ 1 Attachment

Send me a copy of my responses

[Submit Update](#)

After sending the email out, the Initial Invoice Date will automatically be recorded.

Other Automations

Step/Description	Snippet	Outcome/Result
Reminders - 30/60/90/180 days after the date in "Initial Invoice Date", if the Status field is still "Invoice" an update request will be sent to the contacts in the Customer and the Requested By fields.		
When the Status of an invoice changes to "Closed" or "Cancelled", the row will automatically be moved to the Paid in Full/Closed sheet to be recorded historically.		
Additional Information Status Updates: This field is the customer's primary window into their project. Please ensure the status is accurate and updated regularly. If a project is Pending or Delayed (e.g., awaiting parts or a response), you must add a comment explaining the reason. Clear communication here builds customer trust and reduces follow-up inquiries.		Service Request: New Request Declined: Revision Needed Approval: Approved & Ready Processing: In Progress Pending: Delayed / On Hold Cancelled: Project Cancelled
Please add comments during the payment reconciliation process so everyone, including leadership, stays on the same page. This shows that the work is being handled. We also need these notes to back us up if we ever need to decide whether to write off an outstanding balance.		