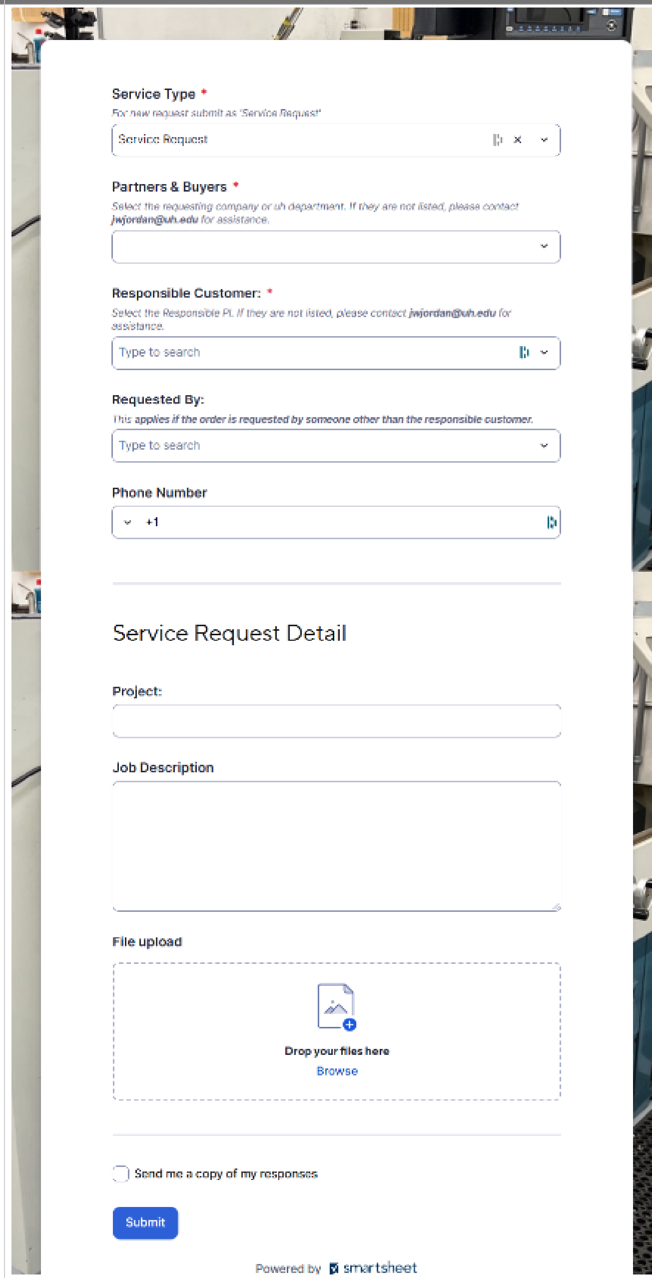
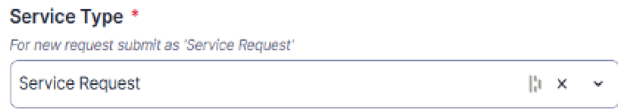
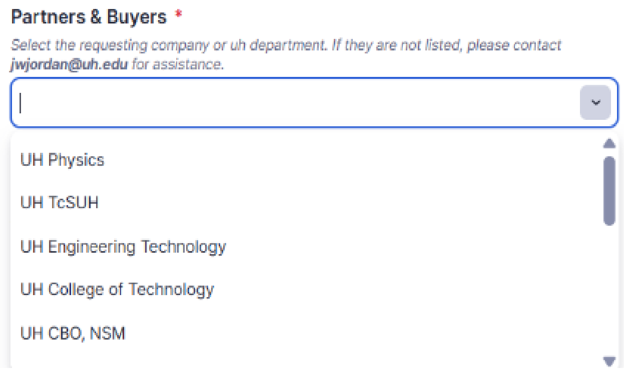
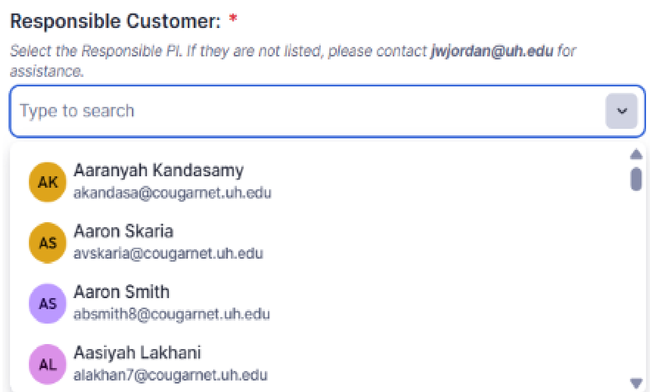
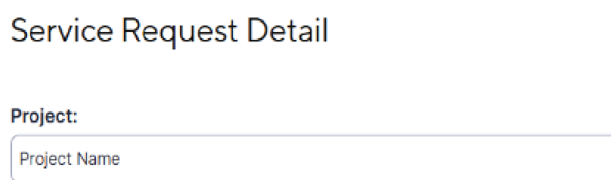
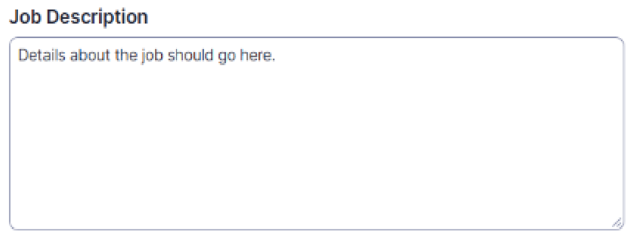
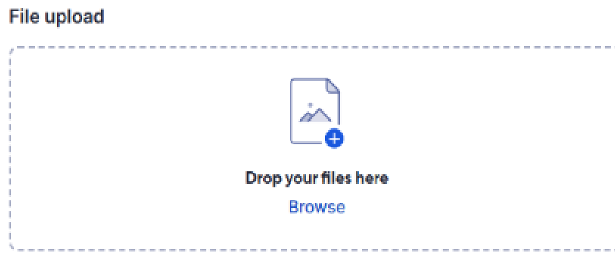
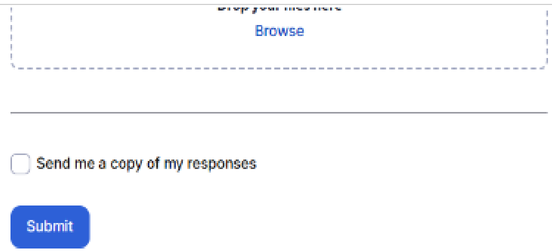
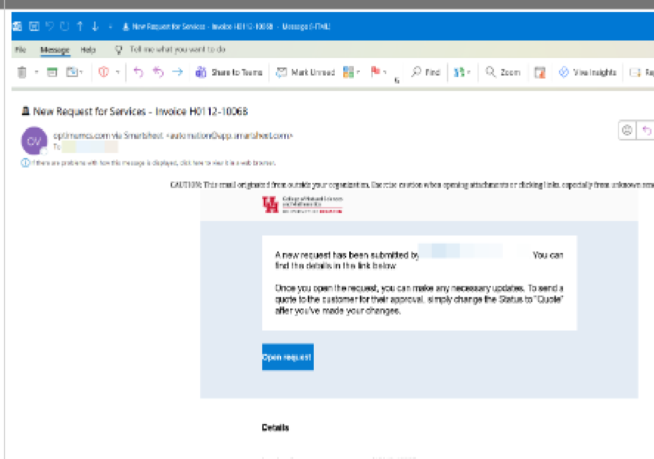
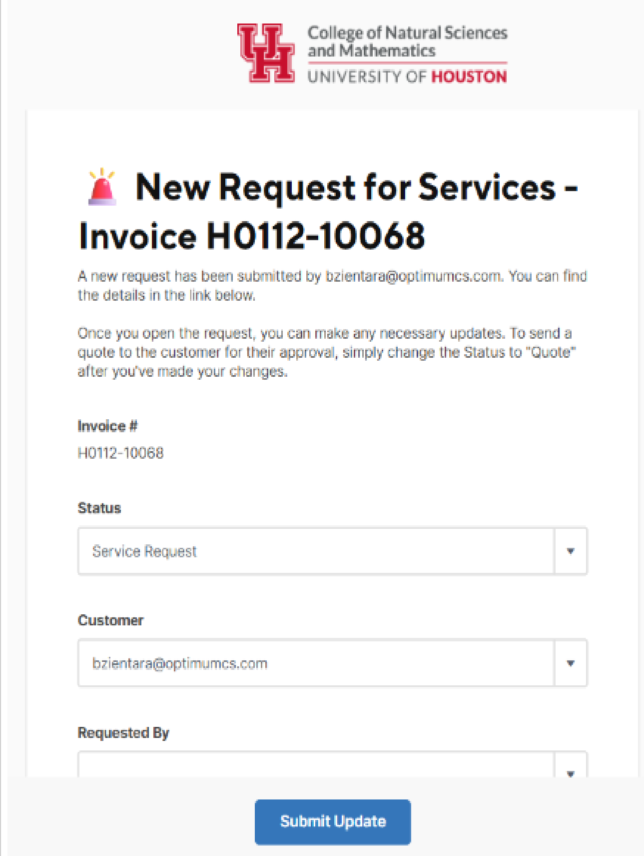
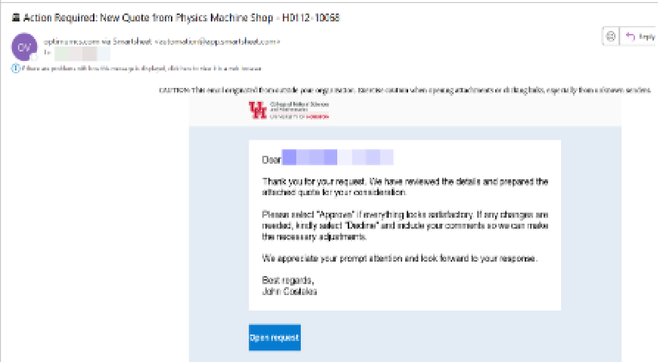
Physics MS Invoicing Guide

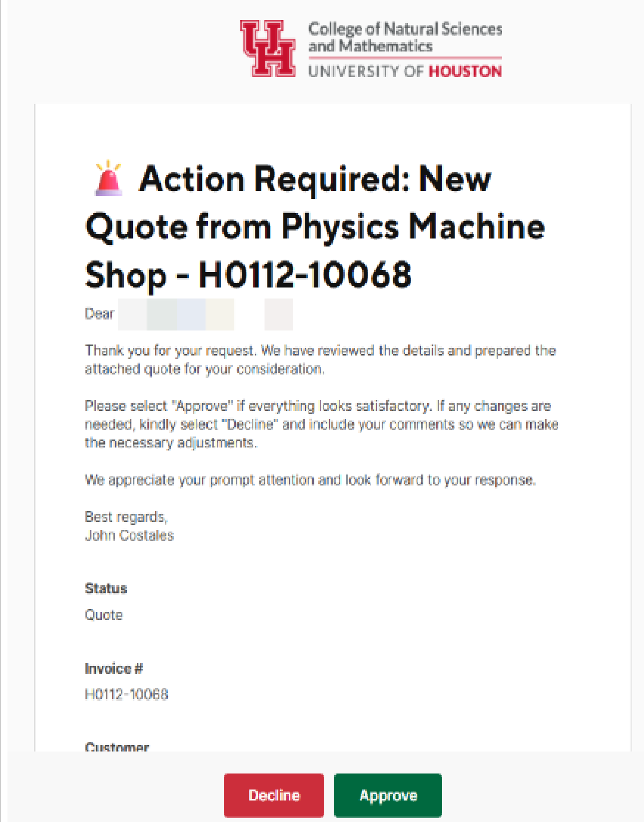
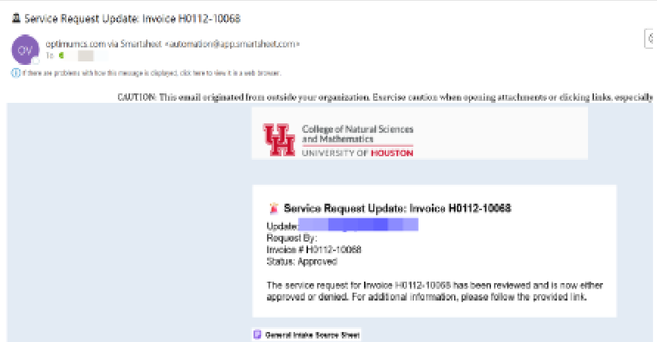
College of Natural Sciences and Mathematics
UNIVERSITY OF HOUSTON

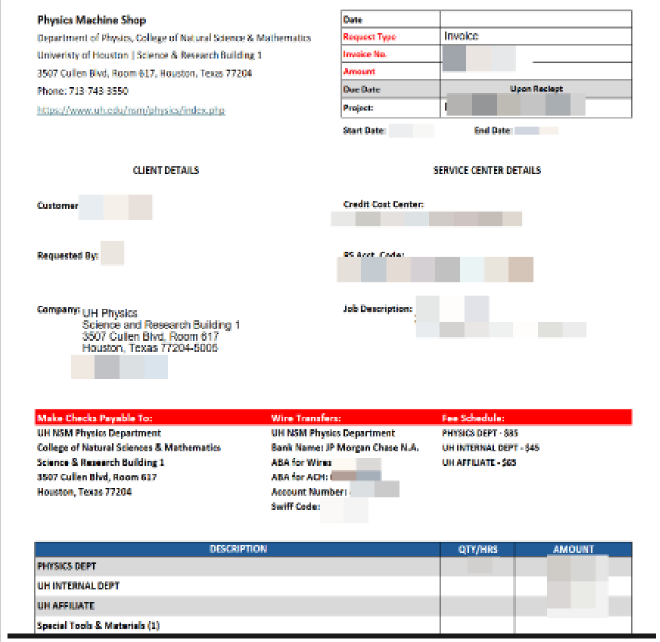
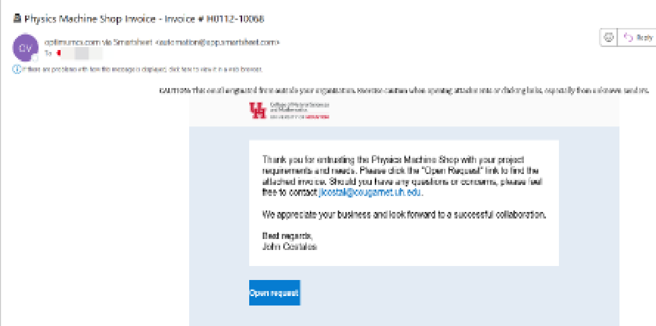
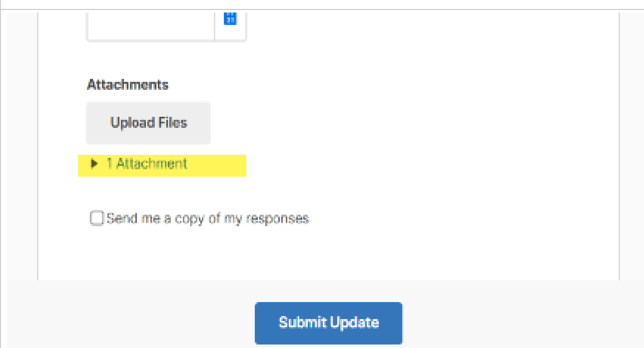
Step/Description	Snippet	Outcome/Result
Faculty (Requestor)		
Submit Form Data		
Open the form from Microsoft Teams and fill out all of the required fields. - All new requests should have a Service Type of "Service Request" - Parters & Buyers should be your department - Responsible Customer should be 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 Click "Submit" to submit your request.		

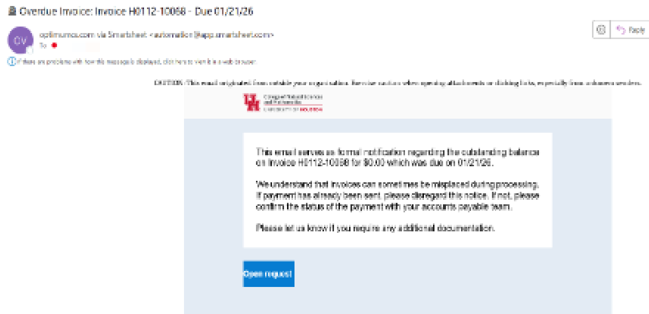
Step/Description	Snippet	Outcome/Result
Service Type	 **Service Type** * *For new request submit as 'Service Request'* Service Request	All new requests should have a Service Type of "Service Request".
Partners & Buyers	 **Partners & Buyers** * *Select the requesting company or uh department. If they are not listed, please contact **jwjordan@uh.edu** for assistance.* UH Physics UH TcSUH UH Engineering Technology UH College of Technology UH CBO, NSM	Parters & Buyers should be your department.
Responsible Customer	 **Responsible Customer:** * *Select the Responsible PI. If they are not listed, please contact **jwjordan@uh.edu** for assistance.* Type to search AK Aaranyah Kandasamy akandasa@cougarnet.uh.edu AS Aaron Skaria avskaria@cougarnet.uh.edu AS Aaron Smith absmith8@cougarnet.uh.edu AL Aasiyah Lakhani alakhan7@cougarnet.uh.edu	Responsible Customer should be the relevant PI, selected from a list of names that will auto-populate with available users.
Phone Number	 **Phone Number** +1	Phone Number should be the requester's phone number.
Project	 Service Request Detail **Project:** Project Name	Project should be the associated project's name.

Step/Description	Snippet	Outcome/Result
Job Description		Job Description should contain any additional details for the job.
File Upload		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.
Admin - Generating a Quote		
Generating a Quote		
When a new request is entered, an update request will be sent to a specific user in charge of reviewing invoices. Open that email and click on the "Open request" button to open the update request.		This will open the request in your browser.

Step/Description	Snippet	Outcome/Result
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.		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.
When the Status changes to "Quote", an approval request is sent to the contacts in the Customer and the Requested By fields.		

Step/Description	Snippet	Outcome/Result
When they click the "Open request" button, an update request will open and prompt them to either approve or decline.	 College of Natural Sciences and Mathematics UNIVERSITY OF HOUSTON Action Required: New Quote from Physics Machine Shop - H0112-10068 Dear Thank you for your request. We have reviewed the details and prepared the attached quote for your consideration. 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. We appreciate your prompt attention and look forward to your response. Best regards, John Costales **Status** Quote **Invoice #** H0112-10068 **Customer** Decline Approve	Their response will be saved in the Status field as either "Approved" or "Declined". This will trigger another email.
When the Status changes to "Approved" or "Declined", an email alert will be sent to a specific person updating them of the change.	 Service Request Update: Invoice H0112-10068 optimumcs.com via Smartsheet <automation@app.smartsheet.com> To If there are problems with how this message is displayed, click here to view it in a web browser. CAUTION: This email originated from outside your organization. Exercise caution when opening attachments or clicking links, especially College of Natural Sciences and Mathematics UNIVERSITY OF HOUSTON **Service Request Update: Invoice H0112-10068** Update: Request By: Invoice # H0112-10068 Status: Approved 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. General Intake Source Sheet	After sending the email out, the Status will automatically be changed to "Invoice".
Generating an Invoice		

Step/Description	Snippet	Outcome/Result
When the Status changes to "Invoice", an automation will trigger and generate a PDF of the invoice.		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.		
When they click the "Open request" button, an update request will open and give them the option to download the attached invoice.		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.		