[**Center for Regenerative Medicine and Skeletal Development**](https://dentalmedicine.uconn.edu/divisions/center-for-regenerative-medicine-and-skeletal-development/)

**Imaging Core – Create Invoice/Quote**

**Instruction Manual**

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1. View catalog info – Price list for all services
2. Create Request – Create and save billing info
3. Create quote/invoice – Create quote and invoice
4. View catalog info
5. Click on button: 

This will show service type list

Column “ItemNum” show total service items number with the service type

1. Click on button  to see service type with the items list

Click on button to see the items list belong to the chosen service type

1. **Create Request for the billing information**
2. Click on button: 
3. Click on button: 
4. Fill out information
5. **Create quote/invoice**
6. Click on button: 

This will go to quote/invoice list

Status:

Pending – Creating quote / invoice for an experiment, not finished yet

Quote – Users request a quote, plan to have experiment

Ready – Invoice is ready to bill to user

Sent – Invoice has been sent to user

Received – Payment has been received

Partial Received - Payment has been partially received

Change invoice status when it is sent

1. Click on button: 
2. Input RequestID if there is one, this will bring bill information

If there is no RequestID, create one

1. Choose “Service Type”
2. Choose “Bill Type”

E: Non-profit outside user

I: Internal user

P: Profit outside user

S: Storrs user

1. Choose “ProductID” from drop down list
2. Input “Quantity”
3. Add all items. If the item is not in the current drop-down list, change “Service Type”
4. If this is just a quote, **change “Status” to “Quote”** from drop-down list
5. If this is an invoice, click on button **“Submit”**
6. Invoice status will be changed to **“Ready”** after it is submitted
7. Click on button “View Invoice/Quote” to view or save PDF file
8. Click on button “**Save as PDF**” on the top to save PDF file

Click on button “**Continue**” to go back to the invoice

1. Please send email to user (CC: [czhang@uchc.edu](mailto:czhang@uchc.edu)) with invoice attached when it is ready to bill

Graphical user interface, application

Description automatically generated