

CORES Order Entry for External Customers

All non-VUMC charges must be processed through CORES. Invoices will be generated at month end close, during the General Ledger upload process (typically third working day of each month). Each core manager is responsible for sending invoices to the customer, following up to ensure prompt payment and documenting in CORES that payment has been received.

If an external customer will make substantial use of the core services, document an agreement for terms & conditions of payment and the scope of work using the [Standard Research Core Services Agreement](#). Contact the Office of Research (OOR) for guidance.

The following SOP refers to operations in CORES version 2.3.0 or later. In general, to ensure appropriate function be sure to enable pop-ups in your browser, and do not log into CORES in more than one browser window.

Setting up new external customer accounts

CORES maintains user accounts for external customers. Core managers may bill to any active external user account. To enable a new external customer user account, core managers must submit a new External User Request Form for review and approval by the Office of Research *prior to billing*.

1. Log into CORES as Service Core Manager or Service Core Associate as applicable.
2. From the top Menu bar, select **Maintenance Menu >> External**.
3. Select an existing Company name from the drop down list, or if the company name is not listed, click Add New Company and type in that new name in the Company field. If you think an existing company name is incorrect, contact the Office of Research – do not add a new company name to correct.
 - Complete all fields in the Add External User Request Form.
 - It is important for the Company address and contact information to be for the office or department authorized to pay charges.
 - A company or institutional email account is preferred for the user email address.
4. Click **Save**. Allow 1-2 business days for review and activation of the user account by OOR. CORES will generate an email confirmation to the core manager once the new customer is active for billing.

Note:

This form will need be filled out only once for each new customer. The information will be retained; following approval, you will be able to select the customer as described below.

Billing an external customer

1. Log into CORES as Service Core Manager or Service Core Associate as applicable.
2. From the top Menu bar, select **Entry>>Order Entry**.
3. Search for the customer in the query field. A list of customer matches will be displayed.
4. **IMPORTANT:** Select date of service provided within the current open month to ensure that an invoice is generated in the next upload process.
5. Click on the appropriate customer billing number from the list displayed.
6. The order entry screen will appear. Select category/description, quantity as appropriate. The Base Price is listed as shown in the core's approved Item Maintenance list. The Adjusted Price for an external customer is marked up from the base price, as determined by the pricing group for that customer's company or institution. The external pricing groups are:
 - External Academic (10% mark up)
 - External For Profit (60% mark up)
7. When order entry is complete, click **Submit** to generate an order to the customer for payment due.

Category	Description	Qty	Base Price	Adjusted Price	Subtotal
1 Confocal Microscopy	Time on 5Live, LSM510, FV-1000 or LSM710 confocal microsc	1.0000	45.00	54.00	54.00
					Total
					54.00

Notes:

Veterans Administration Medical Center customers and Meharry customers will be charged a 10% mark up for all products and services purchased via CORES.

If a higher mark up is needed on an occasional or infrequent basis, edit the base price in Order Entry and provide a price change reason that indicates the increase is due to the need for additional mark up to a For Profit customer.

If the core needs to routinely charge a >60% mark up for an External For Profit customer, contact the Office of Research for guidance.

Contact the Office of Research if there are any questions about the pricing groups assigned to a specific customer.

Invoicing and payment management

External customer orders are transformed into invoices after the monthly General Ledger upload process. An external order does not appear under **External Invoices** until the upload process is run at the end of each month (see General Ledger policy on next page). Orders can be reviewed prior to the upload by selecting **Usage Report** or **Query** from the **Reports Menu**. You can also print the order details using **Reprint Receipts** from the **Reports Menu**.

1. To access invoices in CORES, select **Invoice Menu>> External Invoice**.
2. Select the Email/Print Invoices function as needed by checking the box for **Email** (generates an email message with invoice attached as PDF), or **Print** (for printed document that will be mailed) next to each invoice. After you have checked the appropriate boxes, click **Email/Print Invoices** at the bottom of the page to process.
3. Use the **Add Payment** button on the right to document payment received by check or EFT.

Notes:

Effective January 1, 2015, CORES will no longer process credit card payments.