VU CORES Order Entry for External Customers

All non-VU 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 and conditions of payment and the scope of work using the Standard Research Core Services Agreement. Contact the Office of Contract and Grant Accounting (OCGA) 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.

Creating 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 account, Core Managers must submit a new External User Request Form for review and approval by the Office of Contract and Grant Accounting prior to billing.

1. Login to VU CORES as Service Core Manager or Core Associate as applicable;
2. Select Maintenance Menu >> External
3. Select an existing Company name from the drop down list. If 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, do not add a new company name to correct. Contact Office of Contract and Grant Accounting for further assistance.
   a. Complete all fields in the Add External User Request Form
   b. It is important for the Company Address and contact information to be for the office or department authorized to pay charges.
   c. A company or institutional email account is preferred for the user email address.
4. Click Save.
Billing an External Customer

Login to CORES as Service Core Manager or Core Associate as applicable

From the Menu tab, select **Entry >> Order Entry**

- **Billing Number Correction/Distribution**
- **Open Orders**
- **Order Entry**
- **Refund Entry**
- **Resource Usage Upload**
- **Reserve Core Device**
- **Unconfirmed Orders**

Search for the customer in the query field. A list of customer matchers will be displayed.

**IMPORTANT:** Select the date of service provided within the current open month to ensure that an invoice is generated in the next upload process.

Select the appropriate customer billing number from the list displayed. 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%
- External For Profit – 60%

When order entry is complete, click **Submit** to generate an order to the customer for payment due.

**NOTES:**
Veterans Administration Medical Center and Meharry customers will be charged a 20% markup for all products and services purchased via CORES.

If a higher markup 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 markup to a For Profit customer.

If the core needs to routinely charge a >60% markup for an External For Profit customer or pricing groups assigned to a specific customer, please contact the Office of Contract and Grant Accounting for guidance.

**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 GL 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.

To access invoices in VU Cores, select Invoice Menu>>External Invoice.

Select the Email/Print Invoices function as needed by checking the box for Email (generates an email message with invoice(s) 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.
Use the **Add Payment** button on the right document payment received by check or EFT.

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