

iLab Charge Entry

Using Charge Entry:

1. Click on the Charge Entry Tab

Step 1: Add New Charges

Create a New Request | Add to an Existing Request

Search FOPs: a

search within: current customers this institution All

Select Owner: type in the person's first name then last name for whom you'd like to create a request b

Service Charge: Please select a service charge c

Notes: d

Quantity (each): 1 e

Date Purchased: November 11, 2020 f

Entered By: g

Reset Form | Add to List h

2. Step 1: Add New Charges

- a. Search FOPs > Start entering a FOP if you know the FOP
- b. Select Owner > Enter the customer's name
 - i. If you entered a FOP in step a, the owner drop down will populate with all users who are assigned that FOP
- c. Service Charge > Add the Service you would like to charge for
- d. Notes > Include any notes that pertain to the charge
 - i. These will appear on invoices below the charge
- e. Quantity > Enter the Quantity
- f. Date Purchased > Choose the date that the service was done on
- g. Entered By > Select who worked on/completed the service
- h. Add to List > Select to add service on list in step 2

- If you have multiple charges to enter, click '**Add to List**' and scroll back up to the top and follow steps A – G.

Step 2: Review New Charges

Date	Entered By	Service Charge	Notes	Service Request	Quantity	
Oct 05, 2020	Mike Newsome	Genomics	Test	Request for: Shelly Goethals Admin (ND) Lab	1	✖

4. Step 2: Review New Charges

- In this step you will review all charges, you can make changes here if needed
- When ready click '**Create Request and Confirm Charges**'

Step 3: Provide Payment Information

Please select the payment method:

1 %

100.0% Total Allocated

Skip approval?
 Complete request?

5. Step 3: Provide Payment Information

- Select a FOAPAL from the Dropdown List for Internal users. Select an option from the dropdown list for External users.
- Click '**Submit Request**' when ready. This will create the request and complete it at the same time.

View Confirmed Charges

Filter by: view only charges entered by me display charges

date	entered by	service name	quantity	unit price	price	billing status	work status
Oct 13 10:00 PM	Mike Newsom	NDTC-SR-10 Genomics Testing <small>genomics (External)</small>	Quantity: 1.0	Unit Price: \$20.00	Total: \$20.00	Billing Status: Ready To Bill	Work Status: Completed

- Once submitted you will be able to see all confirmed charges under the View Confirmed Charges Section.