

LUND PROJECT REQUEST WORKFLOW

1. Customer Submits Request > Completes Project Form
2. Submission of a new request triggers email to core staff. Staff reviews request and adds charges via the 'add service' button.

Date	Description	Quantity	Unit Price	Total	Billing Status	Work Status
Oct 19 09:34 AM	DNA PCR-free Prep (24 rxn) Library preparation	<input type="text" value="2.0"/>	kr 7,895.06	kr 15,790.12	Not Ready To	Proposed
Oct 19 09:35 AM	IDT for Illumina DNA/RNA UD Indexes Set A or B Tagmentation (96 Indexes, 96 Samples)	<input type="text" value="1.0"/>	kr 5,821.00	kr 5,821.00	Not Ready To	Proposed

Build a quote, or add components to a new or running request using the 'add' links above.

[add service](#) [add charge](#) [add form](#) [add milestone](#) [sort manually](#)

[Generate PDF quote](#)

3. Once charges have been added, core staff agrees to request (click green 'Agree' button). Additional window pops up that will allow staff to send pdf quote to customer. Check box to 'include pdf quote' > Click Submit.

Waiting for Core to Agree

kr 21,611.12 (kr 21,611.12)

[Agree](#) [Disagree](#)

projected cost: kr 21,611.12

quote expires on:

include pdf quote

pdf quote options:

- service description
- include custom forms table?
- line items
- milestones

notes:

footer:

payment note:

summary:

[submit](#) [Save Progress](#)

4. Project status is 'Waiting for Researcher to Agree'

Waiting for Researcher to Agree

kr 21,611.12 (kr 21,611.12)

[Disagree](#)

5. Customer will receive pdf quote via email. By clicking 'Agree' on their end, the customer is confirming they agree to the quote and staff can begin work on project.

6. Once the customer agrees to the project quote, the project status will update to 'Waiting for Core to Begin'

Waiting for Core to Begin

kr 21,611.12 (kr 21,611.12)

[Begin](#)

7. In 'Waiting for the Core to Begin' status, core staff can open up request to mark first milestone (Initiate Request) as 'Finished' AND add additional Samples Processing Form.

Oct 19 (Oct 19 2021) Rob Researcher (Lab_Test (Testing)_Lab) CTG-RR-14 Transcriptomics P... Waiting for Core to Begin kr 21,611.12 (kr 21,611.12)

[Begin](#)

Overview [edit](#)

Payment Information [update payment information](#)

Forms and Request Details [\(see bottom of list to add items to this request\)](#)

View Form: Transcriptomics Request NEW [Visible](#) [Completed](#)

Milestone	description: click to edit	note: click to edit	Status	Actions
Initiate Request	description: click to edit	note: click to edit	Not Started	edit delete
Sample Delivery	description: click to edit	note: click to edit	Not Started	edit delete
Sequencing	description: click to edit	note: click to edit	Started	edit delete
Data Analysis	description: click to edit	note: click to edit	Finished	edit delete
Data Delivery	description: click to edit	note: click to edit	Not Started	edit delete
Billing	description: click to edit	note: click to edit	Not Started	edit delete

Date	Description	Quantity	Unit Price	Total	Billing Status	Work Status	Process
Oct 19 09:34 AM	DNA PCR-free Prep (24 rxn) Library preparation	2.0	kr 7,895.06	kr 15,790.12	Not Ready To	Financials Ap	Process
Oct 19 09:35 AM	IDT for Illumina DNA/RNA UD Indexes Set A or B Tagmentation (96 Indexes, 96 Samples) indexes	1.0	kr 5,821.00	kr 5,821.00	Not Ready To	Financials Ap	Process

[add service](#) [add](#) [add form](#) [add milestone](#) [sort manually](#)

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