EXTERNAL CUSTOMER BILLING PROCESS

CUSTOMER
- Customer Request is submitted via web form with account attached.
- NOTFIES customer account is needed.
- Update Customer Request status to ACCT NEEDED.

SHOP SUPERVISOR
- ESTIMATE NEEDED notifies Facilities Coordinator estimate is needed.
- AWAIT ESTIMATE NEEDED notifies customer Facilities is awaiting estimates from contractors.
- AWAIT CUST APPRVD notifies customer Facilities has received approval and is proceeding with work.

WO ADMINISTRATOR
- Run Work Order Process.
- Work Order is generated as BILLABLE SERVICE.
- Update Work Order status to WORK COMPLETE.
- Update status to INVOICE CUSTOMER.

TECHNICIAN
- Timecard/External Charge/Inventory is applied against Work Order.
- Approve Timecard/External Charge for Work Order.
- Update Customer Request status to INVOICE CUSTOMER.

- Run Work Order Billing for all Work Orders.
- INVOICE CUSTOMER phase status = set post billing status = CLOSED and close work order = YES.

- E-mail Invoice.
- Transfer funds from account and send invoice to customer.

Customer Request Statuses:
- New
- Account Needed
- Estimate Needed
- CUST Apprved
- Canceled

Phase Statuses:
- Open
- Estimate Needed
- Awaiting Contractors Estimate
- Contractor Assigned
- Customer Approved
- Contractor
- Work in Progress
- Work Complete
- Administrative Hold
- Technician Hold
- Work Complete
- invoice Customer
- Cancelled
- Closed