AiM Customer Request Step-By-Step Quick Guide

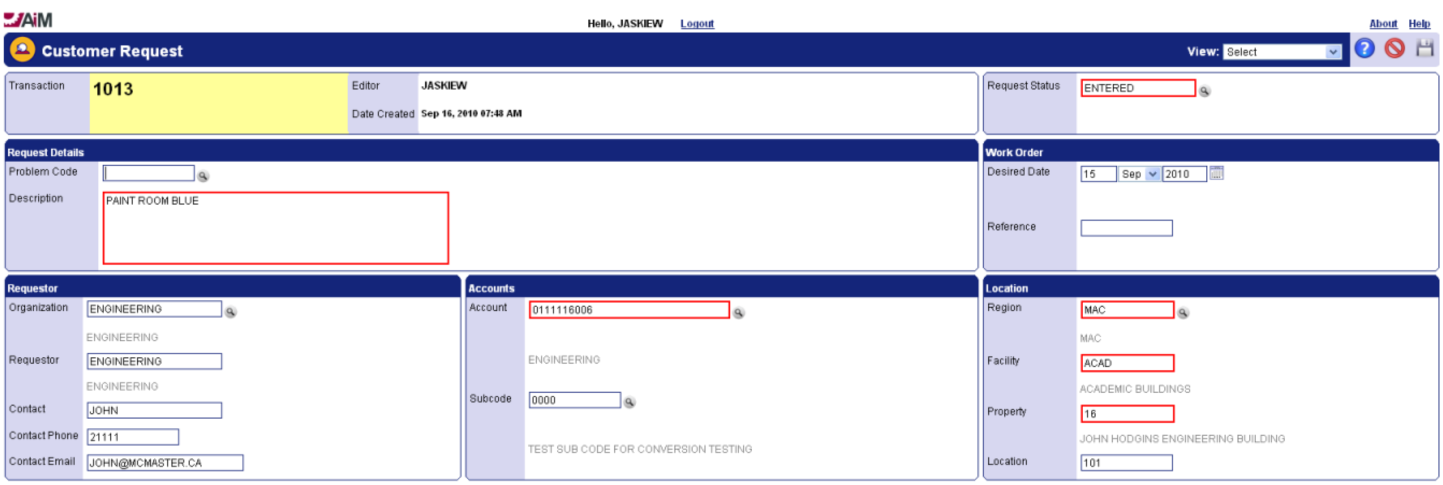
The AiM software will run successfully on current versions of Internet Explorer and Firefox. If you are prompted by your browser that pop-ups have been blocked, please enable when using the AiM software. Note: if you have Google Toolbar Add-on installed, you may be required to use CTRL-click to allow pop-ups when clicking on the zoom icon (magnifying glass).

Create a New Customer Request

1. On the AiM Workdesk, click on Customer Service from the Menu block.
2. On the Customer Service Page, click on Customer Request from the Menu block.
3. Click the blank page (New) icon in the top right corner of the screen.
4. Click in the Description block to enter the work description.
5. In the Requestor block, type in the first few letters of your Organization (department) and click the Organization Zoom (magnifying glass) to select the Organization and Requestor. Alternatively, leave the organization field blank and click the Zoom icon to pull up a complete listing. Use the scroll arrows to see next/previous pages.
6. Complete the Contact, Contact Phone and Contact Email fields.
7. In the Accounts block, click the magnifying glass next to the account field. Select a valid account number from the pop up window. If your account is not listed, please call customer service at extension 24740. Enter 0000 in the subcode box.
8. Specify your work location: **Tip: if you know your building number, you can enter this first in the Property field then click the Region Zoom (magnifying glass) and the Region and Facility will be entered for you. Then select the work location room.**

   or

   Select a Property by clicking Region Zoom. The Region selection screen will appear. Select the Region Mac. A list of Facilities within the selected Region is displayed. Click to select the appropriate Facility. A list of Properties within the selected Facility will be displayed. Click to select the appropriate Property. Select the work order room number from the list of Locations. The Location block is now filled in.



9. OPTIONAL: Select a Problem Code click on the Problem Code Zoom. A List of Problem Codes will be displayed. Click to select the desired Problem Code. The Desired Problem Code is now filled in on the Customer request.

10. To select a Desired Date click on the Calendar Zoom. A Calendar will appear on the screen. Click to select the Desired Date. The Desired Date is now filled in on the Customer Request.

The Customer Request is now ready to be submitted. Click on the Save icon (upper right corner) to save the Customer Request. Please record your Customer Request number for future reference.

Please note that when saving your request, you will <u>not</u> receive immediate confirmation that your request has been submitted. Your request will go through an approval process by our Customer Service Representatives. Upon approval, a confirmation e-mail will be sent to the e-mail address you have provided in your request.

Your Customer Request entry is now complete. Upon approval of your order, you will receive a confirmation email with the corresponding work request number.

Find or Change an Existing Customer Request

1. Navigate to the customer request screen as above.

2. Click the Search icon in the upper right corner (magnifying glass).

3. Enter your search criteria in the search fields. You may search by Transaction Number (which you recorded during creating of your customer request), by your user id in the “created by” field, by entered date or any of the other available search fields.

4. Click the magnifying glass icon in the upper right corner to retrieve all requests matching your search criteria.

5. Click on the specific request you wish to view.

6. If your request is at a status of Entered, you may edit the record (Pencil icon in top right corner) and make changes as necessary.

7. To cancel your request, edit the request and change the status to “cancelled” and resave.

For further information or assistance, please contact Facility Services Customer Service at extension 24740.