






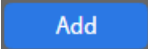
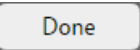
# Customer Request Promotion Process – Comm Center

- Click on Customer Request Approval Query
- Click on the Transaction Number
- Click Edit
- Choose Funding Method
  - 2 options Shop or Work Order
  - If field says Shop, the customer did not provide an account
  - If field says Work Order, the customer provided account information
    - Look at the View Menu
    - If Account is not blue, the account did not validate
    - Click Extra Description to see Account information entered by the customer
- Click on Account to add an account number
- Choose Type
  - M – Maintenance or Custodial
  - Grounds
- Categories –
  - CM – Corrective Maintenance – Work initiated by SSC
  - EV – Events – Support requested for scheduled events (ex: basketball game)
  - PPM – Planned Preventive Maintenance
  - SR – Service Request – Work requested by customer
- Choose Work Code
- Choose Shop
- Enter Shop Person if someone is dispatched. If not, leave blank.
- Priority
  - 1 – Complete in 0 to 1 day
  - 2 – Complete in 2 to 5 days
  - 3 – Complete in 6 to 10 days
  - 4 – Scheduled work or event
- Click 
- Click 
- Change Status to ISSUED
- Click 

## Transfer to Utilities or Building Access

- Click on Customer Request Approval Query
- Click on the Transaction Number
- Click 
- Change Status to TRANSFER UES/BA
- If sending to Building Access, enter Problem Code of BUILDING ACCESS
- Remove the location information. Add it to the description.
- Remove any special characters.
- Click 

## Add Account Number

- On the View menu, choose Account Setup.
- Click Add next to Charge
  - *The Charge account is the one paying for the work. The Offset account is the one receiving the payment. Only the Charge account needs to be setup.*
- Choose the type of account being entered
- Percentage Split – 1 or more accounts will equally split the charges. Percentages must equal 100%
- Fixed Amount – Account only to be used for a specific dollar amount
- Click Next
- *Percentage Split*
  - *Account* - Enter the account number provided. Click the Magnify Glass at the end to validate.
    - *If the name of the account does not appear, then the account is not in AiM.*
  - *Subcode* - Enter the Subcode of 5530. Click the Magnify Glass
  - *Percentage* - Enter the percentage for this account.
- *Fixed Amount*
  - *Account* - Enter the account number provided. Click the Magnify Glass at the end to validate.
    - *If the name of the account does not appear, then the account is not in AiM.*
  - *Subcode* - Enter the Subcode of 5530. Click the Magnify Glass
  - *Amount* – How much can be charged to this account.
  - *Precedence* – The order the accounts should be charged.
- If an additional account is needed, click 
- Click  to return to the previous screen.