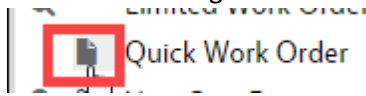
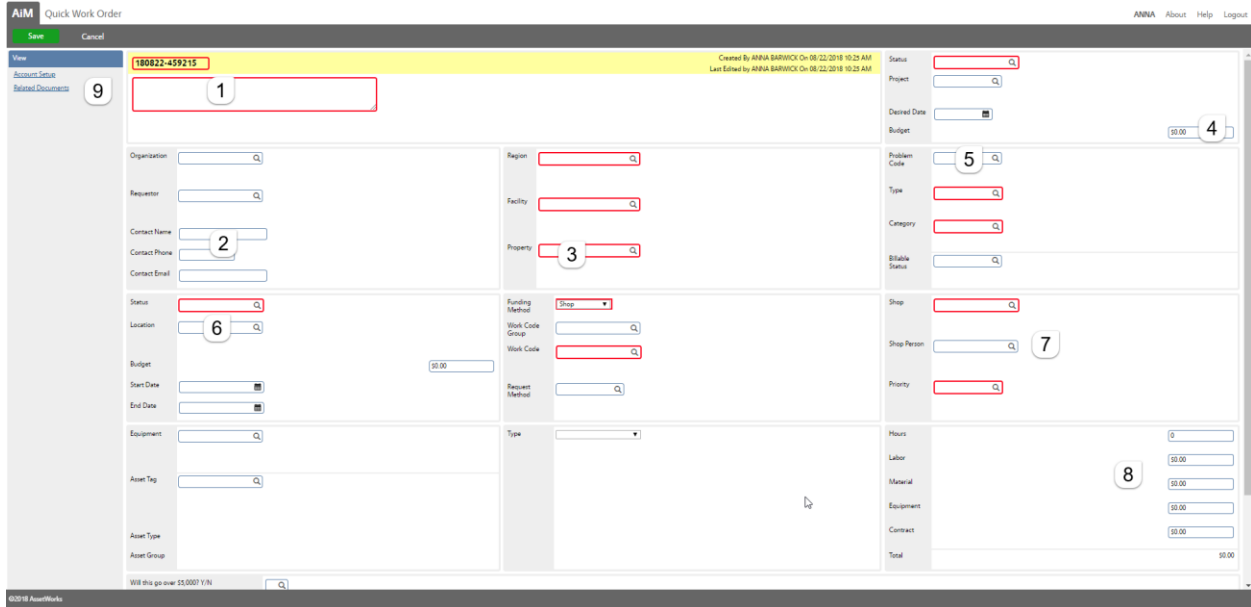


# Enter Work Order for External Customer Jobs



- Click Work Management

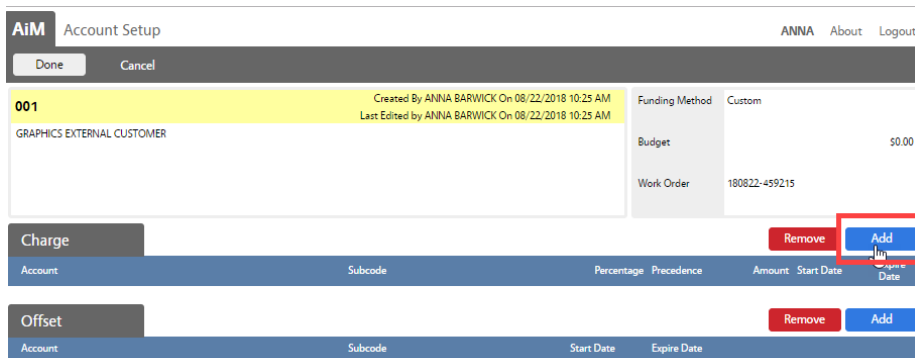


Click paper icon next to Quick Work Order



The screenshot shows the AIM Quick Work Order form. The form is divided into several sections. At the top, there is a 'View' section with a 'Save' button and a 'Cancel' button. Below this, there is a 'Related Documents' section with a '9' callout. The main form area is divided into several sections: 'Organization' (1), 'Requester' (2), 'Contact Name' (3), 'Contact Phone' (4), 'Contact Email' (5), 'Status' (6), 'Location' (7), 'Budget' (8), 'Start Date', 'End Date', 'Equipment', 'Asset Tag', 'Asset Type', 'Asset Group', 'Region', 'Facility', 'Property', 'Funding Method', 'Work Code Group', 'Work Code', 'Request Method', 'Type', 'Problem Code' (9), 'Type', 'Category', 'Billable Status', 'Shop', 'Shop Person' (7), 'Priority', 'Hours', 'Labor', 'Material', 'Equipment', 'Contract', and 'Total'. The form is populated with various values, and the 'Add' button is highlighted with a red box.

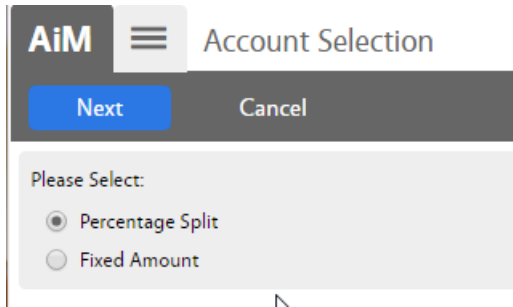
1. Description of job
2. Enter the Contact (Customer) information
3. Enter Property EX01 – Click  to populate the fields
4. Enter the budget is known at this time
5. Enter Problem Code GRAPHICS. Click  to populate the fields
6. Enter the Location (External Customer Location)
7. Enter person completing the work if known at this time
8. Enter Estimate information if known
9. Click Account Setup



The screenshot shows the AIM Account Setup form. The form is divided into several sections: 'Account Setup' (1), 'Charge' (2), and 'Offset' (3). The 'Account Setup' section is highlighted in yellow and contains the following information: '001', 'Created By ANNA BARWICK On 08/22/2018 10:25 AM', 'Last Edited by ANNA BARWICK On 08/22/2018 10:25 AM', 'GRAPHICS EXTERNAL CUSTOMER', 'Funding Method: Custom', 'Budget: 50.00', and 'Work Order: 180822-459215'. The 'Charge' section has a table with columns: Account, Subcode, Percentage, Precedence, Amount, Start Date, and Charge Date. The 'Offset' section has a table with columns: Account, Subcode, Start Date, and Expire Date. The 'Add' button is highlighted with a red box.

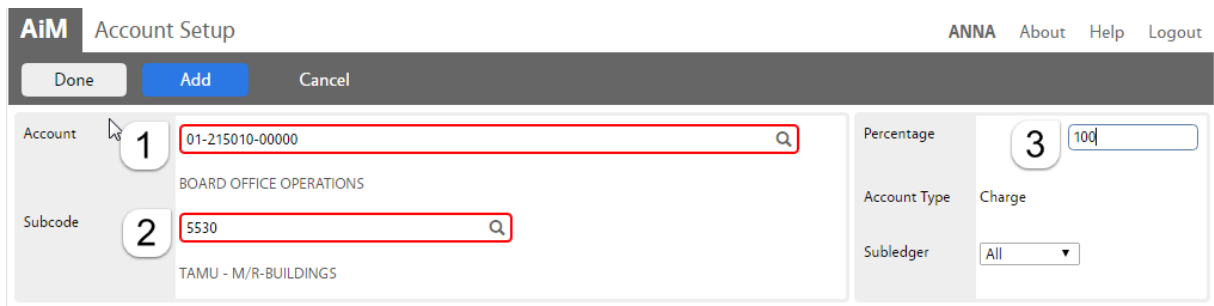
10. Click 

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.



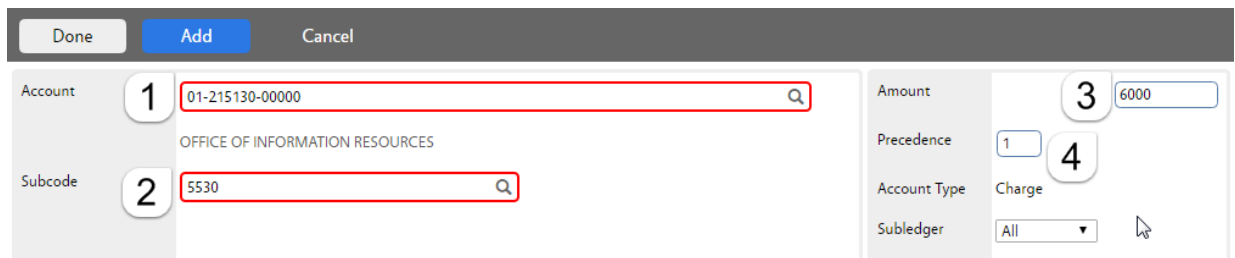
11. Choose the type of account being entered
  - a. Percentage Split – 1 or more accounts will equally split the charges. Percentages must equal 100%
  - b. Fixed Amount – Account only to be used for a specific dollar amount
  - c. Click Next

## Percentage Split



1. *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. Contact AggieWorks or Billing Coordinator.*
2. *Subcode* - Enter the Subcode of 5530. Click the Magnify Glass
3. *Percentage* - Enter the percentage for this account.
4. If an additional account is needed, Click **Add**
5. Click **Done** to return to the previous screen.

## Fixed Amount



1. *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.

2. *Subcode* - Enter the Subcode of 5530. Click the Magnify Glass
3. *Amount* – How much can be charged to this account.
4. *Precedence* – The order the accounts should be charged.
5. If an additional account is needed, click **Add**
6. Click **Done** to return to the previous screen.

## To Remove account

The screenshot shows a 'Charge' screen with a table of accounts. The table has columns for Account, Subcode, Percentage, Precedence, Amount, Start Date, and Expire Date. The second row is selected, and a 'Remove' button is visible in the top right corner. A circled '2' is next to the 'Remove' button, and a circled '1' is next to the selected row.

Account	Subcode	Percentage	Precedence	Amount	Start Date	Expire Date
<input type="checkbox"/> 01-215010-00000	5530	100.0000%				
<input checked="" type="checkbox"/> 01-215130-00000	5530		1	\$6,000.00		

1. Click the box in front of the account
2. Click **Remove**

Message

Are you sure you want to delete?

Confirm Yes

**Yes**

No

- Click **Done** to return to the previous screen.
- Add Related Documents if needed.
- Click **Save**

## External Customer Locations

<b>Location</b>	<b>Description</b>
<a href="#"><u>BISD</u></a>	BASTROP ISD
<a href="#"><u>TAMIU</u></a>	Texas A&M - International (Laredo)
<a href="#"><u>TAMUCC</u></a>	Texas A&M University- Corpus Christi
<a href="#"><u>TAMUK</u></a>	Texas A&M University- Kingsville
<a href="#"><u>WTAMU</u></a>	West Texas A&M University - Amarillo
<a href="#"><u>TAMUC</u></a>	Texas A&M University- Commerce
<a href="#"><u>TAMUT</u></a>	Texas A&M University- Texarkana
<a href="#"><u>TAMUSA</u></a>	Texas A&M University- San Antonio
<a href="#"><u>TAMULAW</u></a>	Texas A&M School of Law - Fort Worth
<a href="#"><u>TAMUCT</u></a>	Texas A&M University- Central Texas Killeen
<a href="#"><u>PVAMU</u></a>	Prairie View A&M University
<a href="#"><u>VES</u></a>	Virginia Episcopal School - Lynchburg, VA
<a href="#"><u>MCU</u></a>	Marymount California University - Rancho Palos Verdes, CA