**Customer Request**

Customer Requests are generated through the Customer Service Module. After the customer completes the process of entering and saving a request, it will be evaluated by the FS Work Order Desk and, if complete, it will be approved and a Work Order will be created.

When creating a Customer Request and when completing the Requestor block, an Organization will need to be provided. Keep in mind that this Organization is associated to an Index. If a reimbursable request is being submitted, the appropriate Organization must be used to ensure entry of that Index number in the AiM system. Prior to submitting a Customer Request it is recommended that you have the Organization available.

To ensure the appropriate Organization is used, a search can be done by using the Index Lookup or Organization Lookup listed under the Quick Links menu located on the WorkDesk or within the Module.

**Using Index Lookup and Organizational Lookup**

**INDEX LOOKUP**

1. Click **INDEX LOOKUP** from the Quick Links menu.
2. Enter the **Index Number**.
3. Click on the **Submit** button.
4. This will display the **F-Level organization** associated to the index number. That is the Organization that will need to be entered into the Organization field when creating the Customer Request.

5. Return to the **AiM WorkDesk** by clicking on the WorkDesk tab of your browser window.
ORGANIZATION LOOKUP

To use the Organization Lookup you will first need to know the Organization number.

1. Click on ORGANIZATION LOOKUP.

The following screen will be displayed.

2. Click on the drop down arrow to display a list of department organizations by number.
3. From the drop down list, find the appropriate department organization number and highlight.

4. Click on the **Submit** button.

5. Locate the number that begins with letter “F”; that is the **Organization F-Level** number.

6. **Write** the number down – you will need this in order to create a Customer Request.

7. Return to the **AiM** window.
Creating a Customer Request

Note: Before you begin, you will need to know your Property (building) number. If you do not know the number, contact your building monitor or the FS Work Order desk for assistance.

Logon to AiM. The **AiM WorkDesk** will be displayed.

1. Click on **Customer Service**.
2. Click on **Customer Request**.

3. Click on the **New** icon.
4. Type in a description of the work being requested in the **Description** field.
5. Enter the **Organization**. This is the Organization F-level number you looked up earlier.
6. Click on the Organization **Zoom** icon.
7. The **Requestor** field will be auto-populated. Confirm that this is the correct organization.

8. Enter a **Contact name**, **Contact Phone**, and **Contact Email**.

9. Click the **Index Zoom** icon to view a list of index numbers available for that Organization.
The Accounts screen will be displayed.

10. Select the appropriate **Index** number. *See Team Tip below.*

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**Team Tip:**

When submitting a request for an I&G building in the Index field, you can opt to use 0-Shop Charge-I&G for non-reimbursable work. The FS Work Order Desk reviews the request and if it is determined that the work is reimbursable the Customer Request will be marked as Incomplete and a valid Index or Indices will need to be identified.
11. Click on the **Acct Code Zoom** icon.

12. Click on the **Acct Code** (**758500** will be the standard account code to use)
13. Click on the **Done** icon.

14. **University**, **Campus**, **Property** and **Location or Room** are required fields; click on the **Zoom** icon to select these fields. Once you get to the Property screen, use the **Search** feature to select the **Property** as shown below.
15. Click on the **Search** icon.

16. Select **contains** from the drop-down list.

17. Type a few letters of the Property (building) name in the **Description** search box. The letters “ACAD” are used in this example. You must type UPPERCASE letters.

18. Click on the **Execute** icon.

The search results will display all Properties with “ACAD” in the description.
19. Click on the **Property** you want.

The **Location** screen will be displayed. Note: Rooms are known as Locations in AiM.

20. Click on the **Location or Room** where the work is needed.
21. Once all of the information has been entered, click on the **Save** icon.

22. The Customer Request has now been **SUBMITTED** and is awaiting final approval from the FS Work Order Desk where a Work Order number will be assigned.
23. A system-generated email notification will be sent to the **Contact Email** address to confirm the request has been received by the FS Work Order Desk.