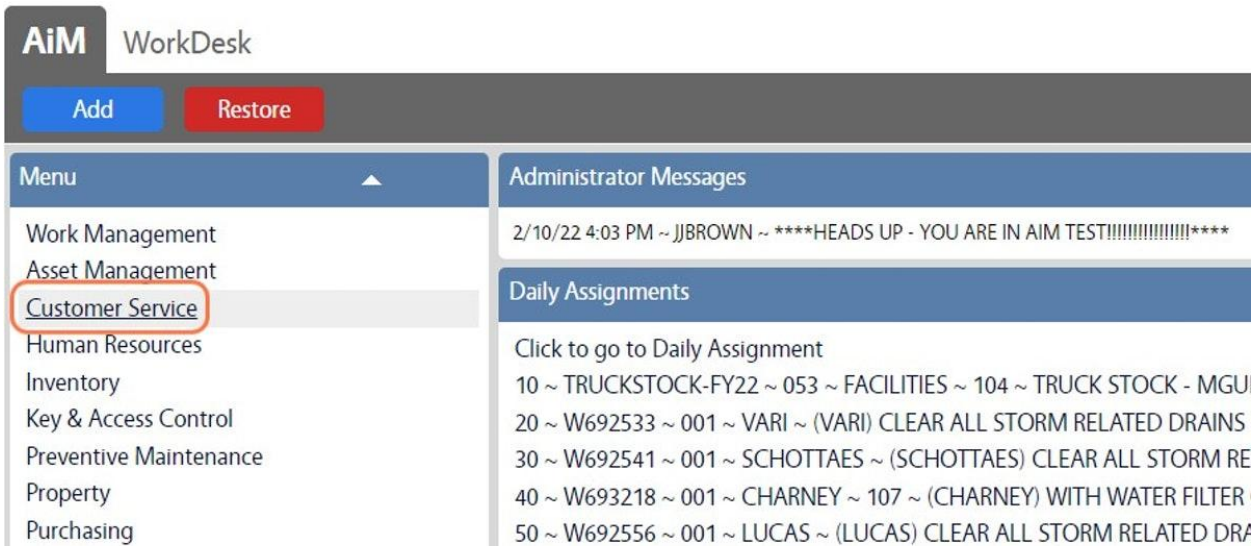


Creating Customer Requests

This allows you to request work orders for your building, not for events.

1. From the main WorkDesk, click on Customer Service.

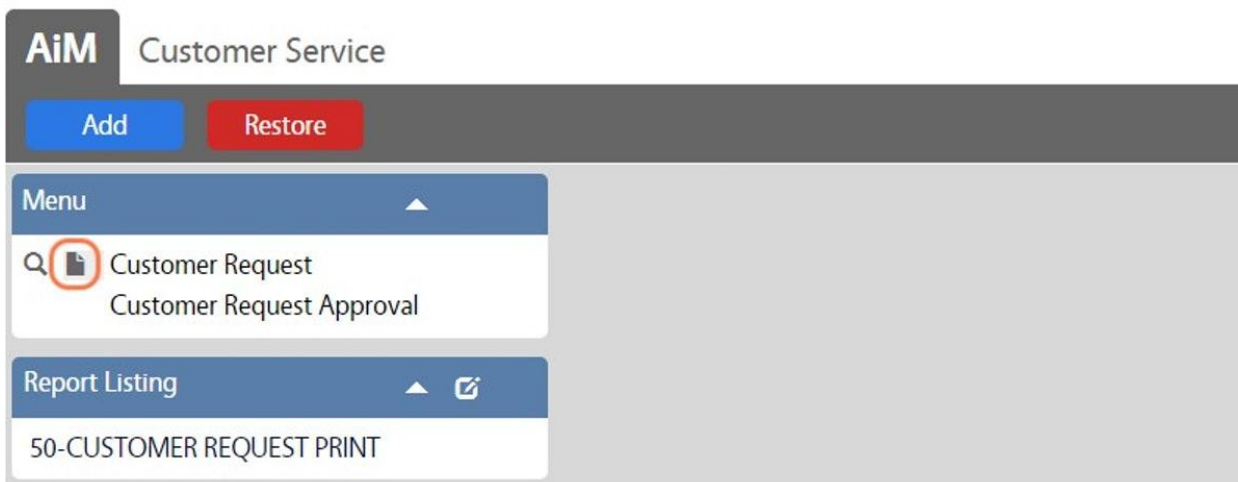


The screenshot shows the AiM WorkDesk interface. At the top left, there is a header with the AiM logo and the text 'WorkDesk'. Below the header are two buttons: 'Add' (blue) and 'Restore' (red). A 'Menu' section is visible on the left, listing various management categories. The 'Customer Service' item is highlighted with a red circle. To the right of the menu, there are sections for 'Administrator Messages' and 'Daily Assignments'. The Administrator Messages section shows a message from JJBROWN dated 2/10/22. The Daily Assignments section lists several tasks related to clearing storm-related drains at various locations.

Menu	Administrator Messages
Work Management	2/10/22 4:03 PM ~ JJBROWN ~ ****HEADS UP - YOU ARE IN AIM TEST!!!!!!!!!!!!!!****
Asset Management	
Customer Service	
Human Resources	
Inventory	
Key & Access Control	
Preventive Maintenance	
Property	
Purchasing	

Daily Assignments
Click to go to Daily Assignment
10 ~ TRUCKSTOCK-FY22 ~ 053 ~ FACILITIES ~ 104 ~ TRUCK STOCK - MGU
20 ~ W692533 ~ 001 ~ VARI ~ (VARI) CLEAR ALL STORM RELATED DRAINS
30 ~ W692541 ~ 001 ~ SCHOTTAES ~ (SCHOTTAES) CLEAR ALL STORM RE
40 ~ W693218 ~ 001 ~ CHARNEY ~ 107 ~ (CHARNEY) WITH WATER FILTER
50 ~ W692556 ~ 001 ~ LUCAS ~ (LUCAS) CLEAR ALL STORM RELATED DRA

2. Click on the paper icon for a new Customer Request.



The screenshot shows the AiM Customer Service interface. At the top left, there is a header with the AiM logo and the text 'Customer Service'. Below the header are two buttons: 'Add' (blue) and 'Restore' (red). A 'Menu' section is visible on the left, listing 'Customer Request' and 'Customer Request Approval'. The 'Customer Request' item is highlighted with a red circle. Below the menu, there is a 'Report Listing' section with a '50-CUSTOMER REQUEST PRINT' option.

Menu
Customer Request
Customer Request Approval

Report Listing
50-CUSTOMER REQUEST PRINT

3. Select a Problem Code by clicking on the magnifying glass.

Problem Code ↓	Description
AERATOR	REPLACE OR CLEAN AERATOR IN FAUCET
AFTER HOURS	CAMPUS SAFETY AFTER HOURS INCIDENT -
APPLIANCE	APPLIANCES
BLINDS	REPAIR OR REPLACE BLINDS - ENTER DETAILS -
BOLT_UNBOLT	BOLT OR UNBOLT ITEMS - ENTER DETAILS -
CALLBACK	CALLBACK - ENTER DETAILS HERE
CEILING TILES	REPLACE OR PAINT CEILING TILES
CHECK NOISE	CHECK NOISE - ENTER DETAILS HERE -
CLEANUP	CLEANUP OF DUST, DEBRIS AND SPILLS
CLOCK	CLOCK ADJUSTMENT, REPAIR OR BATTERY REPLACEMENT
DISPOSAL_PROB	GARBAGE DISPOSAL NOT WORKING
DISPOSE OF ITEM	DISPOSE OF ITEM
DOOR HOLD	DOOR HOLD OPEN NOT WORKING
DOOR PROBLEM	REPAIR DOOR - ENTER DETAILS -
EMPTY BINS	EMPTY WASTE OR RECYCLE BINS
EVAC MAP	REPLACE MISSING EVACUATION MAP
FIRE SAFETY	PROBLEMS WITH FIRE SAFETY EQUIPMENT - EXIT SIGNS OR EXTINGUISHERS OR SMOKE DETECTORS - ENTER SPECIFIC DETAILS -
FLOORING	REPAIRS TO FLOORING, SUCH AT TILE, CARPET, WOOD ETC
FOUNTAIN	WATER FOUNTAINS
FURNITURE	REPAIR PIECE OF FURNITURE - ENTER DETAILS -
GRAFFITI	REMOVE GRAFFITI - ENTER DETAILS -
HANG ITEMS	HANG ITEMS
KEYBOARD TRAY	INSTALL OR MOVE KEYBOARD TRAY
LEAK	CHECK AND REPAIR LEAKS COMING FROM CEILINGS, WALLS, FLOORS ETC.
LIGHT OUT	RELAMP OR REPLACE BALLAST - LIGHTS NOT WORKING

4. Select the appropriate Problem Code.

A screenshot of a form with two input fields. The first field is labeled 'Problem Code' and contains a search icon (magnifying glass) on its right side. The second field is labeled 'Desired Date' and contains a calendar icon on its right side. Both fields are highlighted with a red rectangular border.

5. A brief Description will default in – Add any additional information as needed.

A screenshot of the 'AiM Customer Request' form. The top bar contains 'AiM Customer Request' and buttons for 'Save' and 'Cancel'. A left sidebar lists navigation options: 'View', 'Extra Description', 'Reference Data', 'Comments', 'Account Setup', 'Status History', and 'Related Documents'. The main content area shows a highlighted yellow header with the number '116957'. Below it is a text input field containing 'REPLACE OR PAINT CEILING TILES', which is highlighted with a red border. Further down, there are two dropdown menus: 'Organization' with 'BLDGM' selected and 'Requestor' with 'MGUERRA' selected. Both dropdowns have search icons and are highlighted with red borders. Below the 'Requestor' dropdown, the text 'MARIO GUERRA' is visible.

6. Select the Property by clicking on the magnifying glass next to Region.

A screenshot of a form with three input fields. The first field is labeled 'Region' and contains 'SCU' with a search icon on its right side. Below it, the text 'SANTA CLARA UNIVERSITY' is visible. The second field is labeled 'Facility' and contains 'STRUCTURES' with a search icon on its right side. Below it, the text 'STRUCTURES' is visible. The third field is labeled 'Property' and is empty with a search icon on its right side. All three input fields are highlighted with a red rectangular border.

7. Find the correct Property and click on the name.


AIM Property

Done Search Show All Cancel

Region: SCU Facility: STRUCTURES

Property #	Description
ADOBE	ADOBE LODGE
ALA1030	1030 THE ALAMEDA
ALA3210	3210 THE ALAMEDA
ALA3230	BRONCO VENTURE ACCELERATOR
ALA3305	3305 THE ALAMEDA
ALAMEDA	ALAMEDA HALL
ALUMNISCI	ALUMNI SCIENCE
ALVISO1072	1072 ALVISO ST - ACCOLTI HOUSE
ALVISO1081	1081 ALVISO ST. - LARDER HOUSE
ALVISO1214	ALVISO 1214 PROPERTY MANAGEMENT HOUSE
ALVISO380	380 ALVISO ST
ALVISO536	536 ALVISO STREET
ALVISO541	541 ALVISO STREET
ALVISO543	543 ALVISO STREET
ALVISO544	544 ALVISO STREET
ALVISO545	FACULTY/STAFF HOUSING
ALVISO559	FACULTY/STAFF HOUSING
ALVISO564	564 ALVISO STREET
ALVISO575	575 ALVISO ST
ALVISO584	584 ALVISO STREET
BANNAN_ALUMNI	BANNAN ALUMNI HOUSE
BELLARMINE	BELLARMINE HALL
BELLOMY745	STUDENT HOUSING
BELLOMY775	775 BELLOMY STREET APARTMENTS
BELLOMY805	805 BELLOMY STREET

8. The Location Screen will automatically load. Select the correct room number.

AIM  Location

Done Search Show All Cancel

Region: SCU Facility: STRUCTURES Property: ADOBE

Location #	Floor	Description
001	01	PRIVATE DINING
001A	01	PRIVATE DINING
002	01	PRIVATE DINING
003	01	PRIVATE DINING
004A	01	LOUNGE
004B	01	CORRIDOR
007A	01	MAIN DINING
008	01	SERVING AREA
009	01	FOOD SERVICE
010	01	DISHWASHING
011	01	KITCHEN
012	01	MECHANICAL SPACE
014	01	FACULTY CLUB OFFICE
015	01	WALK-IN FREEZER
016	01	WALK-IN COOLER
017	01	DRY FOOD STORAGE
018	01	ELECTRICAL ROOM
CL0101	01	STORAGE
E100	EXT	PATIO
E101	EXT	FOUNTAIN
E102	01	EXTERIOR CORRIDOR
E103	EXT	SE CORRIDOR
E104	EXT	SE STAIRWAY
E105	EXT	ELECTRICAL ROOM
E106	EXT	FIRE SPRINKLER ROOM

If you need to attach a picture or document to your request, please follow steps 9-17 below. If you do not have anything to attach, skip to step 18.

9. Click on Related Documents

The screenshot shows a software interface. On the left is a sidebar with a 'View' menu containing options: 'Extra Description', 'Reference Data', 'Comments', 'Account Setup', 'Notes Log', 'Status History', and 'Related Documents' (which is highlighted with a red box). The main area has a yellow header with the ID '119444'. Below it is a search bar containing the text 'TEST REQUEST'. Further down is a metadata section with two rows: 'Organization' with a dropdown menu showing 'BUSSVCS' and 'BUSINESS SERVICES', and 'Requestor' with a dropdown menu showing 'JJBROWN' and 'JENNY BROWN'. The 'Requestor' dropdown is also highlighted with a red box.


10. Click on Add

The screenshot shows a toolbar with four buttons: 'Attach', 'Link', 'Remove', and 'Add'. The 'Add' button is highlighted with a red box. Below the buttons is a blue bar with the text 'Related On'.

11. Click the "Choose Files" button and select file you want to upload in the box that comes up

The screenshot shows a file selection dialog box. At the top left is the text 'ew Document'. Below it is a dark grey bar with a 'Cancel' button. The main area of the dialog is light grey and contains the text 'Please select document(s) to load:'. Below this text is a 'Choose Files' button and a file name 'Customer...ide (2).pdf'.

12. Click on Next

AiM  New Document

Next Cancel

Upload File(s)

[Add Meta Data](#)


[Add Attributes](#)

Please select document(s) to load:

Customer...ide (2).pdf

13. Click on Magnifying Glass next to Type

Title: Customer-Service-Request-Guide (2).pdf

Type: 


Tags:

14. Find and click on "IMAGES"

Done **Search** Show All Cancel

Type Name ↓	Description
HELP DOCUMENT	HELP DOCUMENT
HIGHCHARTS_REPORT	HIGHCHARTS REPORTS
HR DOCUMENTS	HR PACKETS
IMAGES	IMAGES
IMAGE_E	EMPLOYEE PROFILE IMAGES ONLY
IMAGE_L	DRIVERS LICENSE IMAGE ONLY
IMAGE_P	PROPERTY PROFILE IMAGES ONLY

15. Click on Next

AiM  New Document



Next Cancel

[Upload File\(s\)](#)

Add Meta Data


[Add Attributes](#)

Title: Customer-Service-Request-Guide (2).pdf

Type: IMAGES  

Tags

16. Click on Next

AiM  New Document

Next Cancel

[Upload File\(s\)](#)

[Add Meta Data](#)

Permissions

Role	Description
------	-------------

17. Click on Done


AiM Related Documents

Done Cancel

119444

TEST REQUEST

Document Listing

<input type="checkbox"/>	Thumbnail	Title	Current Version	Document Type	Extra Description
<input type="checkbox"/>		Customer-Service-Request-Guide (2).pdf	1.0	IMAGES	Made with Tango.us

18. Click on Save.

The screenshot shows the 'AiM Customer Request' interface. At the top left, the 'AiM' logo is displayed next to the title 'Customer Request'. Below this, a dark grey bar contains two buttons: 'Save' (highlighted with a red border) and 'Cancel'. On the left side, there is a 'View' menu with options: 'Extra Description', 'Reference Data' (underlined), 'Comments', 'Account Setup', 'Status History' (underlined), and 'Related Documents'. The main content area features a yellow header with the ID '116957' and a text input field containing 'REPLACE OR PAINT CEILING TILES'. Below the input field, there is an 'Organization' dropdown menu with 'BLDGM' selected and a search icon. Underneath the dropdown, the text 'BUILDING MAINTENANCE' is visible.

Customer Request is now saved and awaiting approval. Click AiM to return to the WorkDesk.