

Slide 1

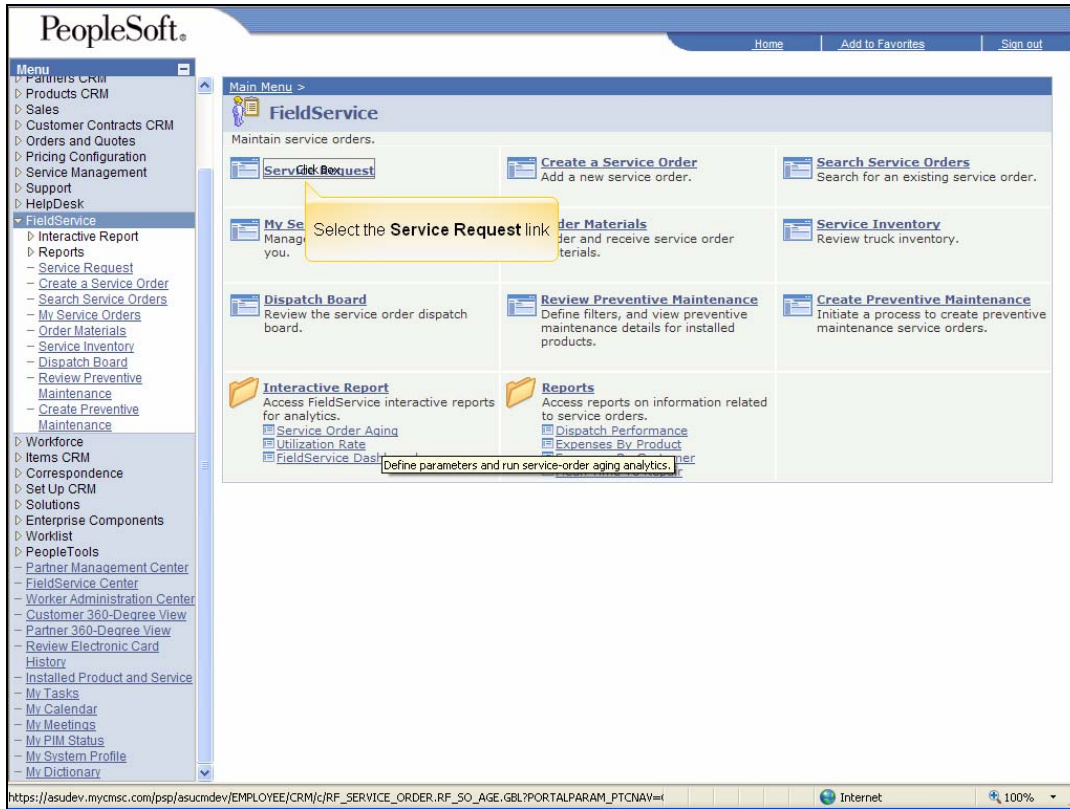
Slide notes:

Text Captions: Select the FieldService link

This is the PeopleSoft home page.

Your security settings will determine the menu items you see on the left hand side of the screen.

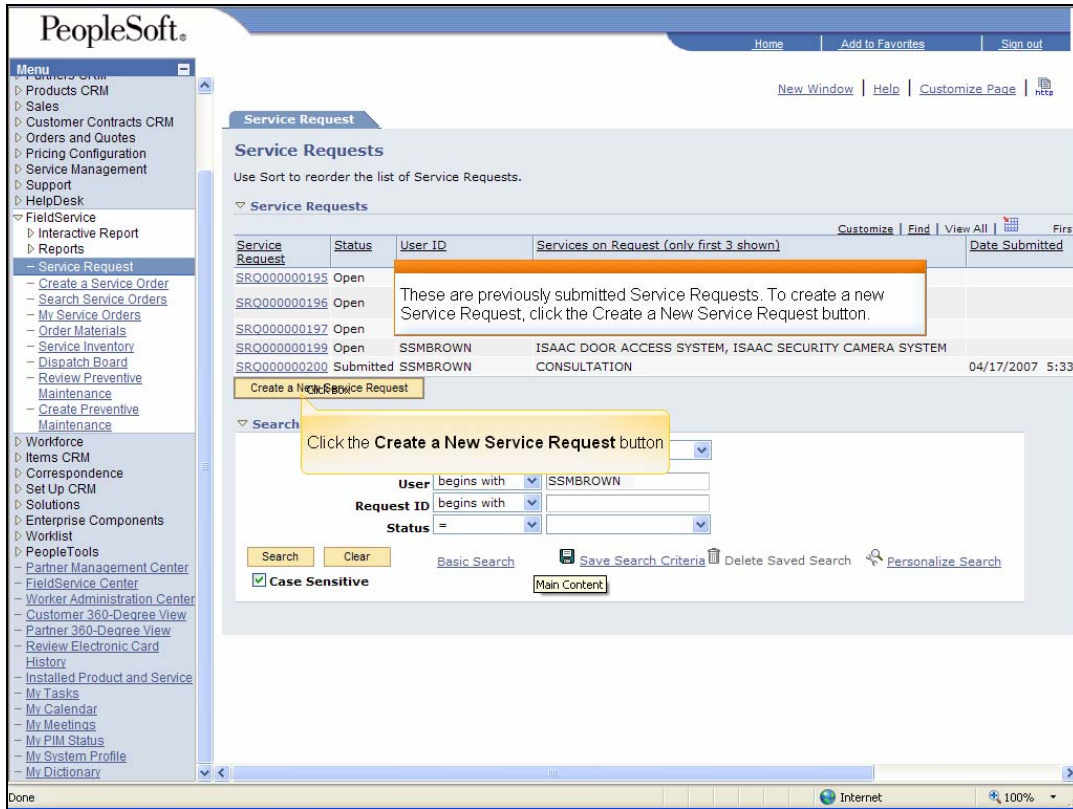
Let's start by creating a new Service Request.



Slide 2

Slide notes:

Text Captions: Select the Service Request link



Slide 3

Slide notes:

Text Captions: Click the Create a New Service Request button

These are previously submitted Service Requests. To create a new Service Request, click the Create a New Service Request button.

PeopleSoft. Home Add to Favorites Sign out

Menu

- Products CRM
- Sales
- Customer Contracts CRM
- Orders and Quotes
- Pricing Configuration
- Service Management
- Support
- HelpDesk
- FieldService
 - Interactive Report
 - Reports
 - Service Request
 - Create a Service Order
 - Search Service Orders
 - My Service Orders
 - Order Materials
 - Service Inventory
 - Dispatch Board
 - Review Preventive Maintenance
 - Create Preventive Maintenance
- Workforce
- Items CRM
- Correspondence
- Set Up CRM
- Solutions
- Enterprise Components
- Worklist
- PeopleTools
 - Partner Management Center
 - FieldService Center
 - Worker Administration Center
 - Customer 360-Degree View
 - Partner 360-Degree View
 - Review Electronic Card History
 - Installed Product and Service
 - My Tasks
 - My Calendar
 - My Meetings
 - My PIM Status
 - My System Profile
 - My Dictionary

4	<input type="checkbox"/>	ASU WIRELESS ONE ROOM AND LESS THAN 25 USERS	1510.00
5	<input type="checkbox"/>	ASU WIRELESS-SUITE OF OFFICES	
6	<input type="checkbox"/>	COX CATV CONNECTION	
7	<input type="checkbox"/>		
8	<input type="checkbox"/>	... NT B IN SAME ROOM	
9	<input type="checkbox"/>		
10	<input type="checkbox"/>	REMODELING 1 TO 5 ROOMS	
11	<input type="checkbox"/>	RENOVATING SUITE/FLOOR OF BUILDING	
12	<input type="checkbox"/>	CONSULTATION	
13	<input type="checkbox"/>	DATACENTER - SERVER FARM	
14	<input type="checkbox"/>	ACTIVATE ETHERNET	250.00
			725.00
			525.00
19	<input type="checkbox"/>	ISAAC DOOR ACCESS SYSTEM	
20	<input type="checkbox"/>	ISAAC SECURITY CAMERA SYSTEM	
21	<input type="checkbox"/>	MOVE ETHERNET	
22	<input type="checkbox"/>	OTHER SPECIAL SYSTEM	
23	<input type="checkbox"/>	SUNCARD SYSTEM	
24	<input type="checkbox"/>	UPGRADE ETHERNET CONNECTION	
25	<input type="checkbox"/>	VERIFY ETHERNET	
26	<input type="checkbox"/>	DNS REQUEST	
27	<input type="checkbox"/>	IP ADDRESS REQUEST	
28	<input type="checkbox"/>	IP DATABASE ACCESS	
29	<input type="checkbox"/>	NETID ACCOUNT	
30	<input type="checkbox"/>	CISCO CLEAN ACCESS SYSTEM	

Done Internet 100%

Slide 4

Slide notes:

Text Captions: Select the COX CATV CONNECTION check box

This page shows a list of services currently available. After the system is fully implemented, the services will be grouped by service type. You need to click on the service type to view the services under that service type.

The screenshot shows the PeopleSoft CRM interface. On the left is a navigation menu with categories like Products CRM, Sales, Customer Contracts CRM, Orders and Quotes, Pricing Configuration, Service Management, Support, and HelpDesk. The 'FieldService' section is expanded, showing 'Reports' and 'Service Request' options. The main area displays a table of service requests with columns for ID, checkboxes, descriptions, and prices. Item 16, 'INSTALL CABLE AND ACTIVATE 1-ETHERNET' with a price of 725.00, is highlighted. A yellow callout box points to the checkbox for this item with the text 'Select the INSTALL CABLE AND ACTIVATE check box'. The browser status bar at the bottom shows 'Internet' and '100%' zoom.

ID	Checkboxes	Description	Price
4	<input type="checkbox"/>	ASU WIRELESS ONE ROOM AND LESS THAN 25 USERS	1510.00
5	<input type="checkbox"/>	ASU WIRELESS-SUITE OF OFFICES	
6	<input checked="" type="checkbox"/>	COX CATV CONNECTION	
7	<input type="checkbox"/>	CABLING ONLY	
8	<input type="checkbox"/>	RELOCATE PHYSICAL CABLING - POINT A TO POINT B IN SAME ROOM	
9	<input type="checkbox"/>	NEW ASU BUILDING OR LEASE	
10	<input type="checkbox"/>	REMODELING 1 TO 5 ROOMS	
11	<input type="checkbox"/>	RENOVATING SUITE/FLOOR OF BUILDING	
12	<input type="checkbox"/>	CONSULTATION	
13	<input type="checkbox"/>	DATACENTER - SERVER FARM	
14	<input type="checkbox"/>	ACTIVATE ETHERNET	250.00
15	<input type="checkbox"/>	BUILDING CONTROL SYSTEM	
16	<input type="checkbox"/>	INSTALL CABLE AND ACTIVATE 1-ETHERNET	725.00
17	<input type="checkbox"/>		525.00
18	<input type="checkbox"/>		
19	<input type="checkbox"/>		
20	<input type="checkbox"/>	ISAAC SECURITY CAMERA SYSTEM	
21	<input type="checkbox"/>	MOVE ETHERNET	
22	<input type="checkbox"/>	OTHER SPECIAL SYSTEM	
23	<input type="checkbox"/>	SUNCARD SYSTEM	
24	<input type="checkbox"/>	UPGRADE ETHERNET CONNECTION	
25	<input type="checkbox"/>	VERIFY ETHERNET	
26	<input type="checkbox"/>	DNS REQUEST	
27	<input type="checkbox"/>	IP ADDRESS REQUEST	
28	<input type="checkbox"/>	IP DATABASE ACCESS	
29	<input type="checkbox"/>	NETID ACCOUNT	
30	<input type="checkbox"/>	CISCO CLEAN ACCESS SYSTEM	

Slide 5

Slide notes:

Text Captions: Select the INSTALL CABLE AND ACTIVATE check box

The screenshot displays the PeopleSoft CRM interface. On the left is a navigation menu with categories like 'Products CRM', 'Sales', 'Customer Contracts CRM', 'Orders and Quotes', 'Pricing Configuration', 'Service Management', 'Support', and 'HelpDesk'. The 'FieldService' section is expanded, showing 'Reports' with a sub-menu for 'Service Request'. The main area contains a table of service requests with columns for an ID, a checkbox, a search icon, a description, and a price. A yellow callout box with the text 'Click the scroll bar' points to the vertical scroll bar on the right side of the table.

ID	Checkbox	Search Icon	Description	Price
4	<input type="checkbox"/>	🔍	ASU WIRELESS ONE ROOM AND LESS THAN 25 USERS	1510.00
5	<input type="checkbox"/>	🔍	ASU WIRELESS-SUITE OF OFFICES	
6	<input checked="" type="checkbox"/>	🔍	COX CATV CONNECTION	
7	<input type="checkbox"/>	🔍	CABLING ONLY	
8	<input type="checkbox"/>	🔍	RELOCATE PHYSICAL CABLING - POINT A TO POINT B IN SAME ROOM	
9	<input type="checkbox"/>	🔍	NEW ASU BUILDING OR LEASE	
10	<input type="checkbox"/>	🔍	REMODELING 1 TO 5 ROOMS	
11	<input type="checkbox"/>	🔍	RENOVATING SUITE/FLOOR OF BUILDING	
12	<input type="checkbox"/>	🔍	CONSULTATION	
13	<input type="checkbox"/>	🔍	DATACENTER - SERVER FARM	
14	<input type="checkbox"/>	🔍	ACTIVATE ETHERNET	250.00
15	<input type="checkbox"/>	🔍	BUILDING CONTROL SYSTEM	
16	<input checked="" type="checkbox"/>	🔍	INSTALL CABLE AND ACTIVATE 1-ETHERNET	725.00
17	<input type="checkbox"/>	🔍	INSTALL CABLE AND MOVE 1-ETHERNET	525.00
18	<input type="checkbox"/>	🔍	INSTALL ETHERNET PER ATTACHED MATRIX	
19	<input type="checkbox"/>	🔍	ISAAC DOOR ACCESS SYSTEM	
20	<input type="checkbox"/>	🔍	ISAAC SECURITY CAMERA SYSTEM	
21	<input type="checkbox"/>	🔍	MOVE ETHERNET	
22	<input type="checkbox"/>	🔍	OTHER SPECIAL SYSTEM	
23	<input type="checkbox"/>	🔍	SUNCARD SYSTEM	
24	<input type="checkbox"/>	🔍	UPGRADE ETHERNET CONNECTION	
25	<input type="checkbox"/>	🔍	VERIFY ETHERNET	
26	<input type="checkbox"/>	🔍	DNS REQUEST	
27	<input type="checkbox"/>	🔍	IP ADDRESS REQUEST	
28	<input type="checkbox"/>	🔍	IP DATABASE ACCESS	
29	<input type="checkbox"/>	🔍	NETID ACCOUNT	
30	<input type="checkbox"/>	🔍	CISCO CLEAN ACCESS SYSTEM	

Slide 6
Slide notes:
Text Captions: Click the scroll bar



The screenshot shows the PeopleSoft CRM interface. On the left is a navigation menu with categories like Products CRM, Sales, Customer Contracts CRM, Orders and Quotes, Pricing Configuration, Service Management, Support, and HelpDesk. The 'FieldService' section is expanded, showing 'Service Request' as the active item. The main area displays a table of service requests with columns for ID, checkboxes, search icons, and descriptions. Row 16, 'INSTALL CABLE AND ACTIVATE 1-ETHERNET', is selected. Below the table, a note reads 'Note: if your service is not listed, use "other"'. Two buttons, 'Finalize Request' and 'Return to Search', are visible. A yellow callout box points to the 'Finalize Request' button with the text 'Click the Finalize Request button'.

ID	Check	Search	Description	Amount
13	<input type="checkbox"/>	🔍	DATACENTER - SERVER FARM	
14	<input type="checkbox"/>	🔍	ACTIVATE ETHERNET	250.00
15	<input type="checkbox"/>	🔍	BUILDING CONTROL SYSTEM	
16	<input checked="" type="checkbox"/>	🔍	INSTALL CABLE AND ACTIVATE 1-ETHERNET	725.00
17	<input type="checkbox"/>	🔍	INSTALL CABLE AND MOVE 1-ETHERNET	525.00
18	<input type="checkbox"/>	🔍	INSTALL ETHERNET PER ATTACHED MATRIX	
19	<input type="checkbox"/>	🔍	ISAAC DOOR ACCESS SYSTEM	
20	<input type="checkbox"/>	🔍	ISAAC SECURITY CAMERA SYSTEM	
21	<input type="checkbox"/>	🔍	MOVE ETHERNET	
22	<input type="checkbox"/>	🔍	OTHER SPECIAL SYSTEM	
23	<input type="checkbox"/>	🔍	SUNCARD SYSTEM	
24	<input type="checkbox"/>	🔍	UPGRADE ETHERNET CONNECTION	
25	<input type="checkbox"/>	🔍	VERIFY ETHERNET	
26	<input type="checkbox"/>	🔍	DNS REQUEST	
27	<input type="checkbox"/>	🔍	IP ADDRESS REQUEST	
28	<input type="checkbox"/>	🔍	IP DATABASE ACCESS	
29	<input type="checkbox"/>	🔍	NETID ACCOUNT	
30	<input type="checkbox"/>	🔍	CISCO CLEAN ACCESS SYSTEM	
31	<input type="checkbox"/>	🔍	FIREWALL SYSTEM	
32	<input type="checkbox"/>	🔍	VPN SECURE CONNECT - EDGE APPLIANCE	
33	<input type="checkbox"/>	🔍	FUTURE INTEGRATION	


Slide 7

Slide notes:

Text Captions: Click the Finalize Request button

Finalize Service Request
 Prepare this request for submission
 Note: The Vendor ID on the Purchase Order must be IT.
 Notes/Comments

Date Created: 05/01/07
 Service Request ID: NEXT
 Status:

Fac. Man. Project Number:
 Building Abbrv.: 
 ASU Room Number:
 Facility Name:
 Payment Method: Purchase
 Purchase Order:

To remove a service, set quantity to 0 and click Save.

Service	Service Order ID	Coordinator	SO Status	Number Requested	Price	Line Total
1 COX CATV CONNECTION				1		
2 INSTALL CABLE AND ACTIVATE 1-ETHERNET				1	\$725.00	\$725.00

Total Estimated Cost \$725.00

Contact Type	Name	Alt. Phone	Alt. Email	Search First Name	Search Last Name	Search ASURite ID
1 Primary	Michael Brown					
2 Billing						
3 Technical						
4 Other						

Add Other Contact

Slide 8

Slide notes:

Text Captions: Click the Building Abbrv. look up icon

Look Up Building Abbrev.

Name: begins with

Facility Name: begins with

ASU Campus Description: begins with

ASU Facility Address: begins with

ASU Facility Location Code: begins with

[Basic Lookup](#)

Search Results
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

[View All](#) First 1-100 of 300

Name	ASU Facility Code	Facility Name	ASU Campus Description	ASU Facility Address	ASU Facility Location Code
8117	R01	COMMUNITY HEALTH SERVICES	OFF CAMPUS	8117 E. ROOSEVELT	OC
ABSH	E821	ABS HEADHOUSE	POLYTECHNIC CAMPUS	7405-1 E. UNITY AVE. - MESA	EC
ABSR	E822	ABS RESEARCH GREENHOUSES	POLYTECHNIC CAMPUS	7405-3 E. UNITY AVE. - MESA	EC
ABST	E820	ABS TEACHING GREENHOUSES	POLYTECHNIC CAMPUS	7405-2 E. UNITY AVE. - MESA	EC
ACACI	160E	ACACIA HALL	TEMPE CAMPUS	1201 S. MCALLISTER AVENUE	MC
ADEL	029E	ADELPHI DRIVE BUILDING	TEMPE CAMPUS	724 E. ADELPHI DRIVE	MC
ADELA	159A	ADELPHI II BUILDING 159A	TEMPE CAMPUS	1339 S. SUNSET DR.	MC
ADELB	159B	ADELPHI II BUILDING 159B	TEMPE CAMPUS	1342 S. SUNSET DR.	MC
ADELC	159C	ADELPHI II BUILDING 159C STE V	TEMPE CAMPUS	1342 S. SUNSET DR.	MC
ADELE	157A	ADELPHI COMMONS (EAST)	TEMPE CAMPUS	739 E. APACHE BLVD. (1310 S. SUNSET DRIVE)	MC
ADELS	157E	ADELPHI COMMONS (SOUTH)	TEMPE CAMPUS	739 E. APACHE BLVD. (1310 S. SUNSET DRIVE)	MC
ADEMF	157F	ADELPHI COMMONS (MAIL FACILITY)	TEMPE CAMPUS	739 E. APACHE BLVD. (1310 S. SUNSET DRIVE)	MC
ADENE	157B	ADELPHI COMMONS (NORTHEAST)	TEMPE CAMPUS	739 E. APACHE BLVD. (1310 S. SUNSET DRIVE)	MC
ADENW	157C	ADELPHI COMMONS (NORTHWEST)	TEMPE CAMPUS	739 E. APACHE BLVD. (1310 S. SUNSET DRIVE)	MC
ADESW	157D	ADELPHI COMMONS SOUTHWEST	TEMPE CAMPUS	739 E. APACHE BLVD. (1310 S. SUNSET DRIVE)	MC

Click to scroll down

Slide 9
 Slide notes:
 Text Captions: Click to scroll down



PeopleSoft. Home Add to Favorites Sign out

Menu
 Products CRM
 Sales
 Customer Contracts CRM
 Orders and Quotes
 Pricing Configuration
 Service Management
 Support
 HelpDesk
 FieldService
 Interactive Report
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 Service Request
 Create a Service Order
 Search Service Orders
 My Service Orders
 Order Materials
 Service Inventory
 Dispatch Board
 Review Preventive Maintenance
 Create Preventive Maintenance
 Workforce
 Items CRM
 Correspondence
 Set Up CRM
 Solutions
 Enterprise Components
 Worklist
 PeopleTools
 Partner Management Center
 FieldService Center
 Worker Administration Center
 Customer 360-Degree View
 Partner 360-Degree View
 Review Electronic Card History
 Installed Product and Service
 My Tasks
 My Calendar
 My Meetings
 My PIM Status
 My System Profile
 My Dictionary

ASU Facility Location Code: begins with

Look Up Clear Cancel Basic Lookup

Search Results
 Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

View All First 1-100 of 300

Name	ASU Facility Code	Facility Name	ASU Campus Description	ASU Facility Address	ASU Facility Code
8117	R01	COMMUNITY HEALTH SERVICES	OFF CAMPUS	8117 E. ROOSEVELT	OC
ABSH	E821	ABS HEADHOUSE	POLYTECHNIC CAMPUS	7405-1 E. UNITY AVE. - MESA	EC
ABSR	E822	ABS RESEARCH GREENHOUSES	POLYTECHNIC CAMPUS	7405-3 E. UNITY AVE. - MESA	EC
ABST	E820	ABS TEACHING GREENHOUSES	POLYTECHNIC CAMPUS	7405-2 E. UNITY AVE. - MESA	EC
ACACI	160E	ACACIA HALL	TEMPE CAMPUS	1201 S. MCALLISTER AVENUE	MC
ADEL	029E	ADELPHI DRIVE BUILDING	TEMPE CAMPUS	724 E. ADELPHI DRIVE	MC
ADELA	159A	ADELPHI II BUILDING 159A	TEMPE CAMPUS	1339 S. SUNSET DR.	MC
ADELB	159B	ADELPHI II BUILDING 159B	TEMPE CAMPUS	1342 S. SUNSET DR.	MC
ADELC	159C	ADELPHI II BUILDING 159C STE V	TEMPE CAMPUS	1342 S. SUNSET DR.	MC
ADELE	157A	ADELPHI COMMONS (EAST)	TEMPE CAMPUS	739 E. APACHE BLVD. (1310 S. SUNSET DRIVE)	MC
ADELS	157E	ADELPHI COMMONS (SOUTH)	TEMPE CAMPUS	739 E. APACHE BLVD. (1310 S. SUNSET DRIVE)	MC
ADEMF	157F	ADELPHI COMMONS (MAIL FACILITY)	TEMPE CAMPUS	739 E. APACHE BLVD. (1310 S. SUNSET DRIVE)	MC
ADENE	157B	ADELPHI COMMONS (NORTHEAST)	TEMPE CAMPUS	739 E. APACHE BLVD. (1310 S. SUNSET DRIVE)	MC
ADENW	157C	ADELPHI COMMONS (NORTHWEST)	TEMPE CAMPUS	739 E. APACHE BLVD. (1310 S. SUNSET DRIVE)	MC
ADESW	157D	ADELPHI COMMONS SOUTHWEST	TEMPE CAMPUS	739 E. APACHE BLVD. (1310 S. SUNSET DRIVE)	MC
ADMVA	002	ADMINISTRATION BUILDING A-WING	TEMPE CAMPUS	1100 S. CADY MALL	MC
AD		ION BUILDING B-WING	TEMPE CAMPUS	1120 S. CADY MALL	MC
AI		ION BUILDING	POLYTECHNIC CAMPUS	5989 S. TERRIPIN AVE.	EC
AI		IVE SERVICES	POLYTECHNIC CAMPUS	6027 S. SAGEWOOD - MESA	EC
AI	127	ARCH & ENVIRMTL DESIGN, NORTH	TEMPE CAMPUS	810 S. FOREST MALL	MC
AG	044	AGRICULTURE BLDG	TEMPE CAMPUS	250 E. LEMON STREET	MC
AGBC	E785	AGRIBUSINESS CENTER	POLYTECHNIC CAMPUS	6096 S. TWINING AVE.	EC
AIP	E315	AMERICAN INDIAN PROGRAM	POLYTECHNIC CAMPUS	5943 S. AMULET AVE.	EC
AIP	E314	AMERICAN INDIAN PROGRAMS ANNEY	POLYTECHNIC CAMPUS	5945 S. AMULET AVE.	EC

Select the AG link

Slide 10
 Slide notes:
 Text Captions: Select the AG link



Finalize Service Request
 Prepare this request for submission

Note: The Vendor ID on the Purchase Order must be IT.

Notes/Comments

Date Created 05/02/07
 Service Request ID NEXT
 Status

Fac. Man. Project Number
 Building Abbrv. AG
 ASU Room Number

Click the ASU Room Number look up icon

If the service requires multiple room locations, leave the Room Number field blank; enter all the room number in the Notes/Comments field.

To remove a service, set quantity to 0 and click Save.

Service	Service Order ID	Coordinator	SO Status	Number Requested	Price	Line Total
1 COX CATV CONNECTION				1		
2 INSTALL CABLE AND ACTIVATE 1-ETHERNET				1	\$725.00	\$725.00

Total Estimated Cost \$725.00

Contact Type	Name	Alt. Phone	Alt. Email	Search First Name	Search Last Name	Search ASURite ID
1 Primary	Michael Brown					
2 Billing						
3 Technical						
4 Other						

Slide 11

Slide notes:

Text Captions: Click the ASU Room Number look up icon

If the service requires multiple room locations, leave the Room Number field blank; enter all the room number in the Notes/Comments field.



PeopleSoft. Home Add to Favorites Sign out

Menu Search: New Win

Look Up ASU Room Number

ASU Facility Code: 044

ASU Room Number: begins with

Facility Name: begins with

ASU Campus Description: begins with

ASU Facility Address: begins with

ASU Facility Location Code: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-100 of 158 Last

ASU Room Number	Facility Name	ASU Campus Description	ASU Facility Address	ASU Facility Location Code
100C1	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
100E1	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
100L1	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
100P1	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
100P2	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
100S1	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
100S2	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
100S3	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
101	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
101A	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
101B	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
101C	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
101D	BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
101E	BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
111A	BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
111L	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
112A	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC
112B	AGRICULTURE BUILDING	TEMPE CAMPUS	250 E. LEMON STREET	MC

Select the 112A link

Slide 12
Slide notes:
Text Captions: Select the 112A link



Finalize Service Request

Prepare this request for submission

Note: The Vendor ID on the Purchase Order must be IT.

Notes/Comments

Date Created: 05/01/07
 Service Request ID: NEXT
 Status:

Fac. Man. Project Number:
 Building Abbrv.: AG
 ASU Room Number: 112A
 Facility Name: AGRICULTURE BUILDING
 Payment Method: Purchase Order
 Purchas:

Click the **Payment Method** drop down

To remove a service, set quantity to 0 and click Save.

Service	Service Order ID	Coordinator	SO Status	Number Requested	Price	Line Total
1 COX CATV CONNECTION				1		
2 INSTALL CABLE AND ACTIVATE 1-ETHERNET				1	\$725.00	\$725.00

Total Estimated Cost \$725.00

Let's look at he estimated cost for the services. Service number two has a \$725.00, which is the quoted amount for that service. Service number one has a blank field for price, which means this service needs to be estimated by the UTO.

Search First Name	Search Last Name	Search ASURite ID	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>

Add Other Contact

Slide 13

Slide notes:

Text Captions: Click the Payment Method drop down

Let's look at he estimated cost for the services. Service number two has a \$725.00, which is the quoted amount for that service. Service number one has a blank field for price, which means this service needs to be estimated by the UTO.

Finalize Service Request

Prepare this request for submission

Note: The Vendor ID on the Purchase Order must be IT.

Notes/Comments

Date Created: 05/01/07
 Service Request ID: NEXT
 Status:

Fac. Man. Project Number:
 Building Abbrv.: AG
 ASU Room Number: 112A
 Facility Name: AGRICULTURE BUILDING
 Payment Method: Purchase Order
 Purchase Order:

To remove a service, set quantity to 0 and click Save.

Service	Service Order ID	Coordinator	SO Status	Number Requested	Price	Line Total
1 COX CATV CONNECTION				1		
2 INSTALL CABLE AND ACTIVATE 1-ETHERNET				1	\$725.00	\$725.00

Total Estimated Cost \$725.00

Contact Type	Name	Alt. Phone	Alt. Email	Search First Name	Search Last Name	Search ASURite ID
1 Primary	Michael Brown					
2 Billing						
3 Technical						
4 Other						

Add Other Contact

Slide 14
 Slide notes:
 Text Captions: Select the Other item



Finalize Service Request

Prepare this request for submission

Note: The Vendor ID on the Purchase Order must be IT.

Notes/Comments

Click Box (326 x 182) (X:215; Y:199)
Click the Notes/Comments text box

Date Created 05/01/07
Service Request ID NEXT
Status

Fac. Man. Project Number
Building Abbrv. AG
ASU Room Number 112A
Facility Name AGRICULTURE BUILDING
Payment Method Other
Purchase Order

To remove a service, set quantity to 0 and click Save.

Service	Service Order ID	Coordinator	SO Status	Number Requested	Price	Line Total
1 COX CATV CONNECTION				1		
2 INSTALL CABLE AND ACTIVATE 1-ETHERNET				1	\$725.00	\$725.00

Total Estimated Cost \$725.00

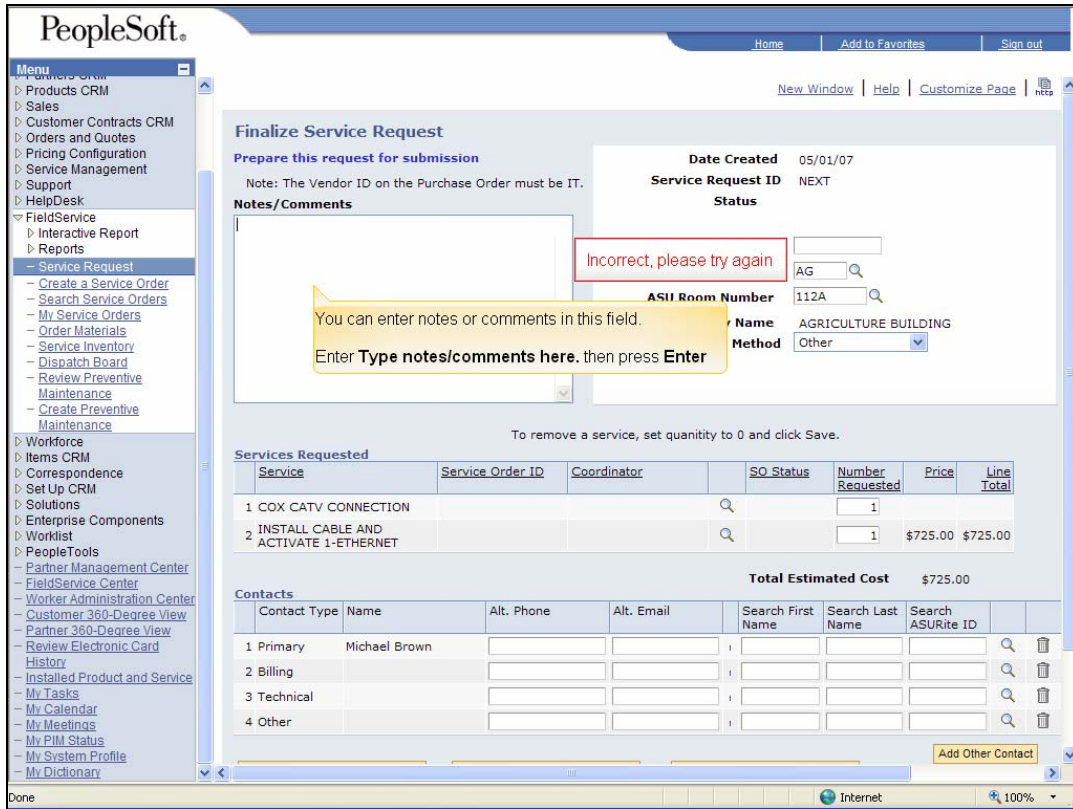
Contact Type	Name	Alt. Phone	Alt. Email	Search First Name	Search Last Name	Search ASURite ID
1 Primary	Michael Brown					
2 Billing						
3 Technical						
4 Other						

Add Other Contact

Slide 15

Slide notes:

Text Captions: Click the Notes/Comments text box



Slide 16

Slide notes:

Text Captions: Incorrect, please try again

You can enter notes or comments in this field.

Enter Type notes/comments here. then press Enter

Finalize Service Request

Prepare this request for submission

Note: The Vendor ID on the Purchase Order must be IT.

Notes/Comments
Type notes/comments here.

Date Created 05/01/07
Service Request ID NEXT
Status

Fac. Man. Project Number
Building Abbrv. AG
ASU Room Number 112A
Facility Name AGRICULTURE BUILDING
Payment Method Other

To remove a service, set quantity to 0 and click Save.

Service	Service Order ID	Coordinator	SO Status	Number Requested	Price	Line Total
1 COX CATV CONNECTION				1		
2 INSTALL CABLE AND ACTIVATE 1-ETHERNET				1	\$725.00	\$725.00

Total Estimated Cost \$725.00

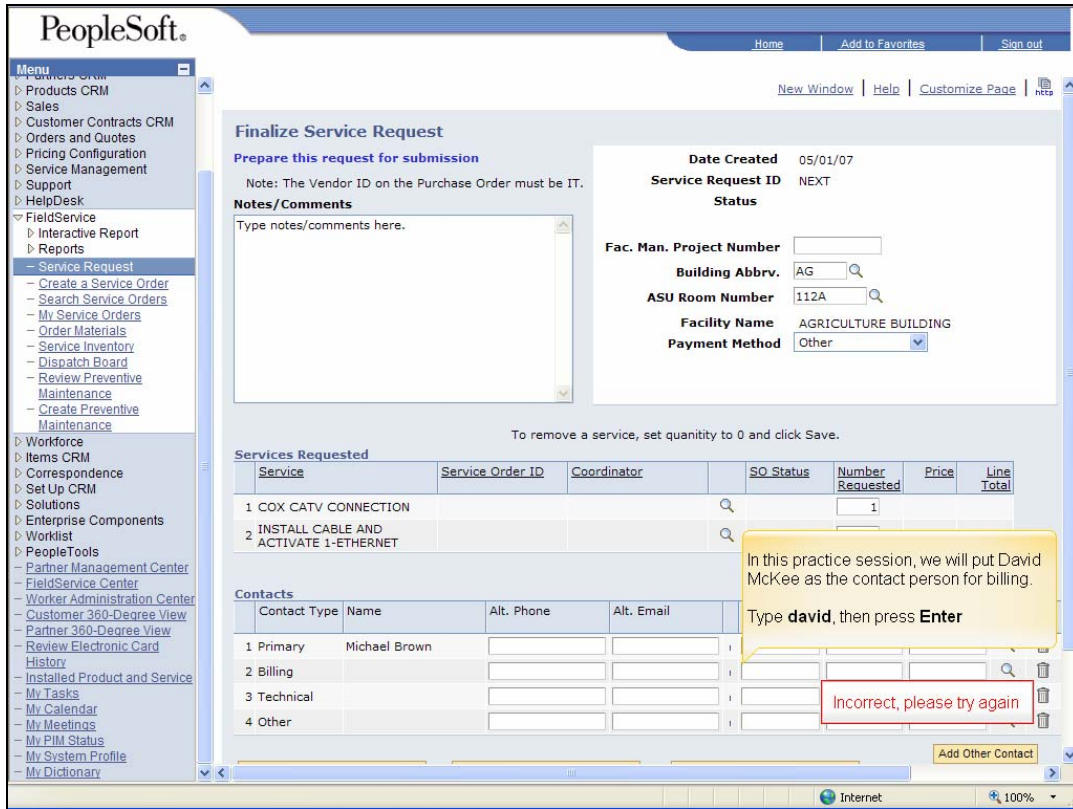
Contact Type	Name	Alt. Phone	Alt. Email	Search First Name	Search Last Name	Search ASURite ID
1 Primary	Michael Brown					
2 Billing				Click Box		
3 Technical						
4 Other						

Click the **Search First Name** field for Billing Contact

Slide 17

Slide notes:

Text Captions: Click the Search First Name field for Billing Contact



Slide 18

Slide notes:

Text Captions: Incorrect, please try again

In this practice session, we will put David McKee as the contact person for billing.

Type david, then press Enter

Finalize Service Request

Prepare this request for submission

Note: The Vendor ID on the Purchase Order must be IT.

Notes/Comments
Type notes/comments here.

Date Created 05/01/07
Service Request ID NEXT
Status

Fac. Man. Project Number
Building Abbrv. AG
ASU Room Number 112A
Facility Name AGRICULTURE BUILDING
Payment Method Other

To remove a service, set quantity to 0 and click Save.

Service	Service Order ID	Coordinator	SO Status	Number Requested	Price	Line Total
1 COX CATV CONNECTION				1		
2 INSTALL CABLE AND ACTIVATE 1-ETHERNET				1	\$725.00	\$725.00

Total Estimated Cost \$725.00

Contact Type	Name	Alt. Phone	Search Last Name	Search ASURite ID
1 Primary	Michael Brown			
2 Billing			david	
3 Technical				
4 Other				

Type **mckee** in the Search Last Name field, then press **Enter**

Incorrect, please try again

Slide 19

Slide notes:

Text Captions: Incorrect, please try again

Type mckee in the Search Last Name field, then press Enter

PeopleSoft. Home | Add to Favorites | Sign out

New Window | Help | Custor

Finalize Service Request

Prepare this request for submission

Note: The Vendor ID on the Purchase Order must be IT.

Notes/Comments
Type notes/comments here.

Date Created 05/01/07
Service Request ID NEXT
Status

Fac. Man. Project Number
Building Abbrv. AG
ASU Room Number 112A
Facility Name AGRICULTURE BUILDING
Payment Method Other

To remove a service, set quantity to 0 and click Save.

Services Requested						
Service	Service Order ID	Coordinator	SO Status	Number Requested	Price	Line Total
1 COX CATV CONNECTION				1		
2 INSTALL CABLE AND ACTIVATE 1-ETHERNET				1	\$725.00	\$725.00

Total Estimated Cost \$725.00

Contacts						
Contact Type	Name	Alt. Phone	Alt. Email	Search First Name		
1 Primary	Michael Brown					
2 Billing				david	mckee	
3 Technical						
4 Other						

Click the lookup icon

Add Other Contact

Waiting for https://asudev.mycmsc.com/psc/asucdev/EMPLOYEE/CRM/c/RF_SERVICE_ORDER.ASU_DMO_F

Slide 20
Slide notes:
Text Captions: Click the lookup icon



The screenshot shows the PeopleSoft CRM interface. On the left is a navigation menu with categories like Products CRM, Sales, Customer Contracts CRM, Orders and Quotes, Pricing Configuration, Service Management, Support, HelpDesk, FieldService, Workforce, and PeopleTools. The main area is titled 'Person Search' and contains search fields for First Name (david), Last Name (mckee), and ASURite ID. Below the search fields is a table of search results. A yellow callout box with the text 'Select the name from the list' points to the fourth row of the table.

ASURite ID	EmplID	Name
1	1000131840	David McKee
2	1000262925	David McKee
3	1000408516	David McKee
4 dmckee	1000408516 Click Box	David McKee
5		David McKee
6 dmckee		David McKee
7		David McKee
8	1000415462	David McKee

Slide 21

Slide notes:

Text Captions: Select the name from the list

PeopleSoft. Home Add to Favorites Sign out

New Window Help Customize Page

Finalize Service Request

Prepare this request for submission

Note: The Vendor ID on the Purchase Order must be IT.

Date Created 05/01/07
Service Request ID NEXT
Status

Fac. Man. Project Number
Building Abbrv. AG
ASU Room Number 112A
Facility Name AGRICULTURE BUILDING
Payment Method Other

Notes/Comments
 Type notes/comments here.

To remove a service, set quantity to 0 and click Save.

Services Requested						
Service	Service Order ID	Coordinator	SO Status	Number Requested	Price	Line Total
1 COX CATV CONNECTION				1		
2 INSTALL CABLE AND ACTIVATE 1-ETHERNET				1	\$725.00	\$725.00

Total Estimated Cost \$725.00

Contacts						
Contact Type	Name	Alt. Phone	Alt. Email	Search First Name	Search Last Name	Search ASURite ID
1 Primary	Michael Brown					
2 Billing	David McKee					
3 Technical						
4 Other						

Click to scroll to the right

Slide 22
 Slide notes:
 Text Captions: Click to scroll to the right



The screenshot shows the PeopleSoft CRM interface. On the left is a navigation menu with categories like 'Products CRM', 'Sales', 'Customer Contracts CRM', 'Orders and Quotes', 'Pricing Configuration', 'Service Management', 'Support', 'HelpDesk', 'FieldService', 'Workforce', and 'PeopleTools'. The main area displays a 'Request' form with fields for 'Date Created' (05/01/07), 'Service Request ID' (NEXT), 'Status', 'Fac. Man. Project Number', 'Building Abbrv.' (AG), 'ASU Room Number' (112A), 'Facility Name' (AGRICULTURE BUILDING), and 'Payment Method' (Other). Below the form is a table with columns: Service Order ID, Coordinator, SO Status, Number Requested, Price, and Line Total. The table contains two rows: one for 'ACTION' and one for 'NET'. A yellow callout box points to the 'Same as primary' button for the 'Technical Contact' field, with text: 'For Technical contact, we'll use Michael Brown who is also the primary contact for this request. Click the Same as primary button for Technical Contact'.

Slide 23

Slide notes:

Text Captions: For Technical contact, we'll use Michael Brown who is also the primary contact for this request.

Click the Same as primary button for Technical Contact

PeopleSoft. Home | Add to Favorites | Sign out

New Window | Help | Customize Page | Help

Finalize Service Request

Prepare this request for submission

Note: The Vendor ID on the Purchase Order must be IT.

Notes/Comments
Type notes/comments here.

Date Created 05/01/07
Service Request ID NEXT
Status

Fac. Man. Project Number
Building Abbrv. AG
ASU Room Number 112A
Facility Name AGRICULTURE BUILDING
Payment Method Other

To remove a service, set quantity to 0 and click Save.

Service	Service Order ID	Coordinator	SO Status	Number Requested	Price	Line Total
1 COX CATV CONNECTION				1		
2 INSTALL CABLE AND ACTIVATE 1-ETHERNET				1	\$725.00	\$725.00

Total Estimated Cost \$725.00

Contact Type	Name	Alt. Phone	Alt. Email	Search First Name	Search Last Name	Search ASURite ID
1 Primary	Michael Brown					
2 Billing	David McKee					
3 Technical	Michael Brown					
4 Other						

Click to scroll down

Add Other Contact

Slide 24
Slide notes:
Text Captions: Click to scroll down



The screenshot displays the PeopleSoft CRM Field Service interface. On the left is a navigation menu with categories like 'Products CRM', 'Sales', 'Customer Contracts CRM', 'Orders and Quotes', 'Pricing Configuration', 'Service Management', 'Support', 'HelpDesk', 'FieldService', 'Interactive Report', and 'Reports'. The 'Service Request' option is selected under 'Reports'. The main content area includes a 'Notes/Comments' section, a 'Status' section with fields for 'Fac. Man. Project Number', 'Building Abbv.' (AG), 'ASU Room Number' (112A), 'Facility Name' (AGRICULTURE BUILDING), and 'Payment Method' (Other). Below this is a 'Services Requested' table with columns for Service, Service Order ID, Coordinator, SO Status, Number Requested, Price, and Line Total. Two services are listed: 'COX CATV CONNECTION' and 'INSTALL CABLE AND ACTIVATE 1-ETHERNET'. A 'Total Estimated Cost' of \$725.00 is shown. A 'Contacts' table lists contact types (Primary, Billing, Technical, Other) and names (Michael Brown, David McKee). At the bottom, there are buttons for 'Save Request', 'Submit Request', 'Cancel Request', and 'Add Other Contact'. A yellow callout box points to the 'Save Request' button with the text 'Click the Save Request button'.

Slide 25

Slide notes:

Text Captions: Click the Save Request button



PeopleSoft. Home Add to Favorites Sign out

Menu

- Products CRM
- Sales
- Customer Contracts CRM
- Orders and Quotes
- Pricing Configuration
- Service Management
- Support
- HelpDesk
- FieldService
 - Interactive Report
 - Reports
 - Service Request
 - Create a Service Order
 - Search Service Orders
 - My Service Orders
 - Order Materials
 - Service Inventory
 - Dispatch Board
 - Review Preventive Maintenance
 - Create Preventive Maintenance
- Workforce
- Items CRM
- Correspondence
- Set Up CRM
- Solutions
- Enterprise Components
- Worklist
- PeopleTools
 - Partner Management Center
 - FieldService Center
 - Worker Administration Center
 - Customer 360-Degree View
 - Partner 360-Degree View
 - Review Electronic Card History
 - Installed Product and Service
 - My Tasks
 - My Calendar
 - My Meetings
 - My PIM Status
 - My System Profile
 - My Dictionary

Notes/Comments

Type notes/comments here.

Status **Processing**

Fac. Man. Project Number

Building Abbrev. AG

ASU Room Number 112A

Facility Name AGRICULTURE BUILDING

Payment Method Other

To remove a service, set quantity to 0 and click Save.

Service	Service Order ID	Coordinator	SO Status	Number Requested	Price	Line Total
1 COX CATV CONNECTION				1		
2 INSTALL CABLE AND ACTIVATE 1-ETHERNET				1	\$725.00	\$725.00

Total Estimated Cost \$725.00

Contact Type	Name	Alt. Phone	Alt. Email	Search First Name	Search Last Name	Search ASURite ID
1 Primary	Michael Brown					

Once the request is submitted, you can NOT add any service to this request. You have to create a new request if needed.

Save Request Submit Request Cancel Request Add Other Contact

Return to Search

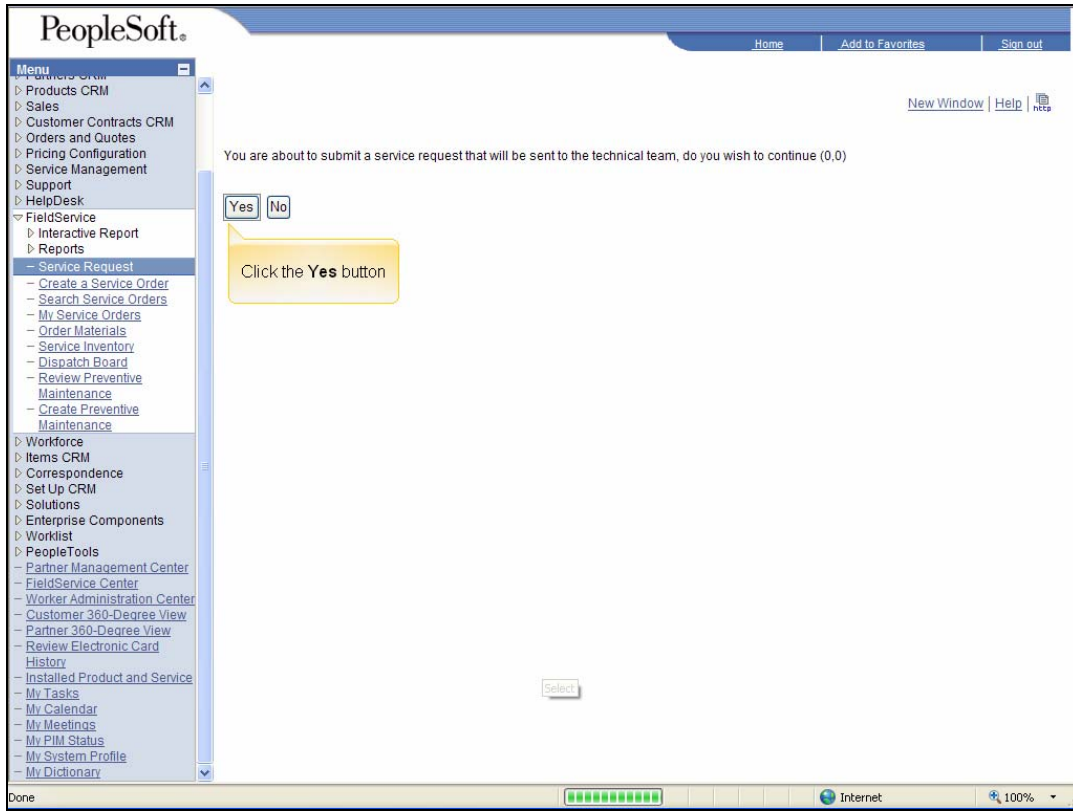
Click the **Submit Request** button

Slide 26

Slide notes:

Text Captions: Click the Submit Request button

Once the request is submitted, you can NOT add any service to this request. You have to create a new request if needed.



Slide 27

Slide notes:

Text Captions: Click the Yes button

The screenshot displays the PeopleSoft CRM Field Service interface. On the left is a navigation menu with categories like 'Products CRM', 'Sales', 'Customer Contracts CRM', 'Orders and Quotes', 'Pricing Configuration', 'Service Management', 'Support', 'HelpDesk', 'FieldService', 'Interactive Report', and 'Reports'. The main area contains a 'Notes/Comments' section, a 'Status' dropdown set to 'Submitted', and a 'Date Submitted' of '05/01/07 9:18AM'. Below this are fields for 'Fac. Man. Project Number', 'Building Abbrev.' (AG), 'ASU Room Number' (112A), 'Facility Name' (AGRICULTURE BUILDING), and 'Payment Method' (Other). A 'Services Requested' table is visible with two rows: '1 COX CATV' and '2 INSTALL CACTIVATE'. A 'Contacts' table lists four contacts: '1 Primary Michael Brown', '2 Billing David McKee', '3 Technical Michael Brown', and '4 Other'. A 'Windows Internet Explorer' warning dialog is overlaid on the screen, stating: 'If using 'Other' for a service order payment, work on the service order will not begin until payment has been arranged. (0,0)'. A yellow callout box points to the 'Click the OK button' text.

Slide 28
Slide notes:
Text Captions: Click the OK button



The screenshot shows the PeopleSoft CRM interface for creating a service request. The left sidebar contains a menu with options like 'Products CRM', 'Sales', 'Customer Contracts CRM', 'Orders and Quotes', 'Pricing Configuration', 'Service Management', 'Support', 'HelpDesk', 'FieldService', 'Interactive Report', and 'Reports'. The main area displays a 'Service Request' form with fields for 'Status' (Submitted), 'Date Submitted' (05/01/07 9:18AM), 'Fac. Man. Project Number', 'Building Abbrv.' (AG), 'ASU Room Number' (112A), 'Facility Name' (AGRICULTURE BUILDING), and 'Payment Method' (Other). A 'Notes/Comments' section is visible at the top left. A 'Service' table lists two items: '1 COX CATV CONNECTION' (SVC0000504) and '2 INSTALL CABLE AND ACTIVATE 1-ETHERNET' (SVC0000505). A 'Contacts' table lists four contacts: '1 Primary Michael Brown', '2 Billing David McKee', '3 Technical Michael Brown', and '4 Other'. A 'Windows Internet Explorer' dialog box is open, displaying a warning icon and the message: 'Your Service Order ID is: SVC0000504 (0,0)'. A yellow callout box points to the 'Click OK' button in the dialog. Another yellow callout box points to the 'Click the OK button' text in the dialog. A text box above the dialog explains: 'The system generates a service order ID for each service in the request. In this practice, we have two services on the request, so there are two services order IDs.' The bottom of the screen shows the 'Save Request', 'Submit Request', and 'Cancel Request' buttons, along with a 'Return to Search' button and an 'Add Other Contact' button.

Slide 29

Slide notes:

Text Captions: Click the OK button

The system generates a service order ID for each service in the request. In this practice, we have two services on the request, so there are two services order IDs.

The screenshot displays the PeopleSoft CRM Field Service interface. The top navigation bar includes 'Home', 'Add to Favorites', and 'Sign out'. The left sidebar contains a 'Menu' with various options, including 'Service Request' and 'Reports'. The main content area features a 'Notes/Comments' section, a 'Status' dropdown set to 'Submitted', and a 'Date Submitted' of '05/01/07 9:18AM'. Below this is a 'Fac. Man. Project Number' field, a 'Building Abbrv.' dropdown set to 'AG', an 'ASU Room Number' dropdown set to '112A', a 'Facility Name' dropdown set to 'AGRICULTURE BUILDING', and a 'Payment Method' dropdown set to 'Other'. A 'Saved' button is visible in the top right. The 'Services Requested' table shows two items: '1 COX CATV CONNECTION' and '2 INSTALL CABLE AND ACTIVATE 1-ETHERNET'. A 'Windows Internet Explorer' error dialog box is overlaid on the table, displaying a warning icon and the message: 'Your Service Order ID is: SVC0000505 (0,0)'. A yellow callout box points to the 'Click OK' button in the dialog. Below the table is a 'Contacts' section with a table listing contact types and names. At the bottom, there are buttons for 'Save Request', 'Submit Request', 'Cancel Request', and 'Return to Search'. The browser status bar at the bottom shows 'Done' and 'Internet'.

Slide 30
Slide notes:
Text Captions: Click the OK button



PeopleSoft.

Home | Add to Favorites | Sign out

Menu

- Partners CRM
- Products CRM
- Sales
- Customer Contracts CRM
- Orders and Quotes
- Pricing Configuration
- Service Management
- Support
- HelpDesk
- FieldService
 - Interactive Report
 - Reports
 - Service Request
 - Create a Service Order
 - Search Service Orders
 - My Service Orders
 - Order Materials
 - Service Inventory
 - Dispatch Board
 - Review Preventive Maintenance
 - Create Preventive Maintenance
- Workforce
- Items CRM
- Correspondence
- Set Up CRM
- Solutions
- Enterprise Components
- Worklist
- PeopleTools
 - Partner Management Center
 - FieldService Center
 - Worker Administration Center
 - Customer 360-Degree View
 - Partner 360-Degree View
 - Review Electronic Card History
 - Installed Product and Service
 - My Tasks
 - My Calendar
 - My Meetings
 - My PIM Status
 - My System Profile
 - My Dictionary

Notes/Comments

Type notes/comments here.

Status Submitted

Date Submitted 05/01/07 9:18AM

Fac. Man. Project Number

Building Abbrev. AG

ASU Room Number 112A

Facility Name AGRICULTURE BUILDING

Request Method Other

You've just submitted a Service Request. Next, we will add notes and an attachment to this request. You can click on the service order ID to open the service order.

Services Requested

Service	Service Order ID	Coordinator	SO Status	Number Requested	Price	Line Total
1 COX CATV CONNECTION	SVC0000504		Open	1		
2 INSTALL CABLE AND ACTIVATE 1-ETHERNET	SVC0000505		Open	1	\$725.00	\$725.00

Total Estimated Cost \$725.00

Contacts

Contact Type	Name	Search First Name	Search Last Name	Search ASURite ID
1 Primary	Michael Brown			
2 Billing	David McKee			
3 Technical	Michael Brown			
4 Other				

Save Request | Submit Request | Cancel Request | Add Other Contact

Return to Search

Slide 31

Slide notes:

Text Captions: Click on the SVC0000505 link

You've just submitted a Service Request.

Next, we will add notes and an attachment to this request. You can click on the service order ID to open the service order.

The screenshot displays the PeopleSoft CRM Field Service interface. The main window shows a Service Order for customer Michael Brown. The service is 'INSTALL CABLE AND ACTIVATE 1-ETHERNET'. A yellow callout box with the text 'Select the Notes tab' points to the 'Notes' tab in the navigation bar. The interface includes a left-hand menu, a top navigation bar, and a main content area with various tabs and fields.

Service Order 05/01/2007 10:41:11AM PDT My Time Zone

Save Add 360 360-Degree View Notify Correspondence Email Detail Report Personalize

Service Order ID SVC0000505 **Unit** ASU01
Customer Michael Brown **Service** INSTALL CABLE AND ACTIVATE 1-ETHERNET
Customer Value **Contact**
Status Open **Priority** Normal

Service Order Activities Time & Material ClickBox Billing Interaction History

Customer Information

Customer Michael Brown
Contact [Search]
Alternate Phone [Search]
Address COMPUTING COMMONS, TEMPE, AZ [View Address]

BLDG Abbrv. AG **Room Number** 112A **Building Code/Room Number** 044:112A
Facility Name AGRICULTURE BUILDING

Contacts

Contact Type	Name	Alt. Phone	Email Address	Search First Name	Search Last Name	ASURITE Id
1 Primary	Michael Brown					
2 Billing	David McKee					
3 Technical	Michael Brown					
4 Other						

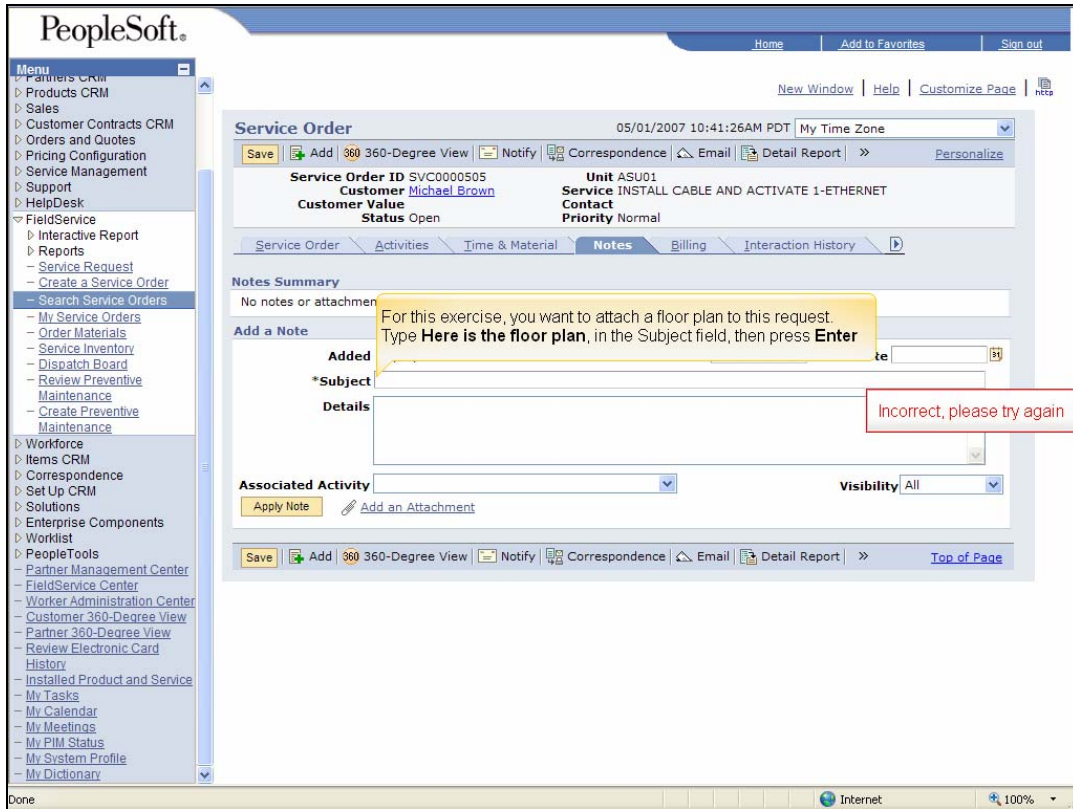
Service Details

Description Type notes/comments here.

*Service ID CSR0000016 Service INSTALL CABLE AND ACTIVATE 1-ETHERNET
*Status Open *Priority Normal

Slide 32
Slide notes:
Text Captions: Select the Notes tab





Slide 33

Slide notes:

Text Captions: Incorrect, please try again

For this exercise, you want to attach a floor plan to this request.

Type Here is the floor plan, in the Subject field, then press Enter



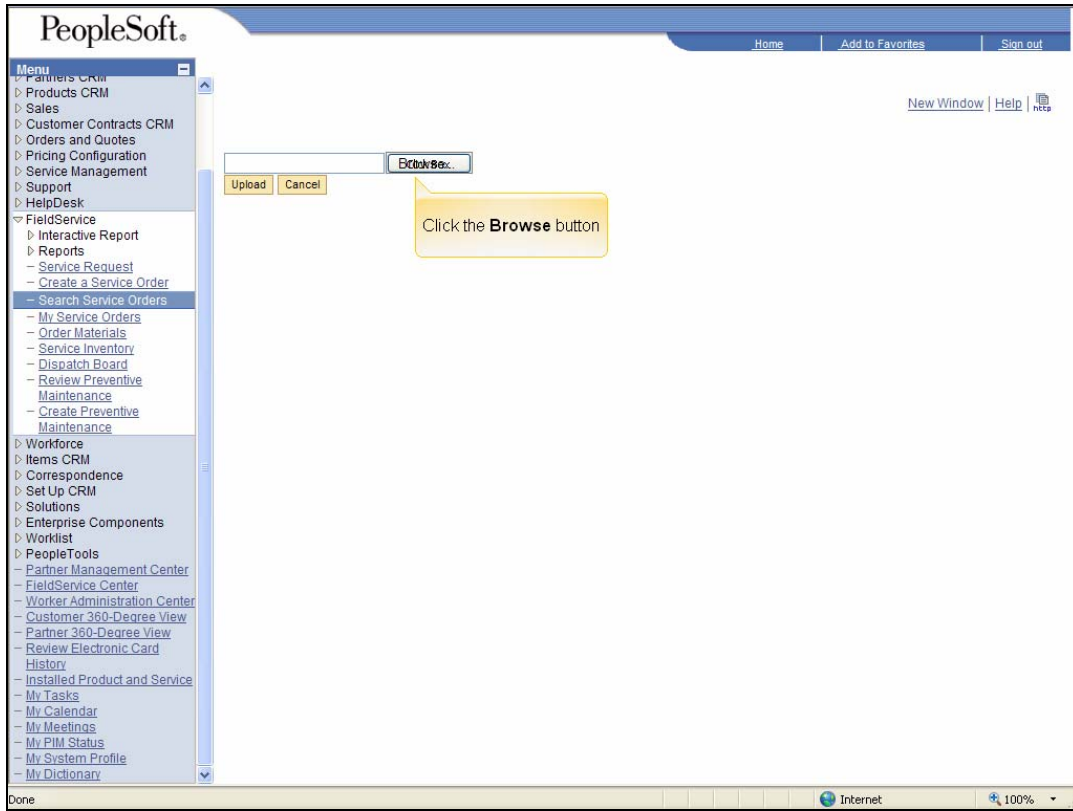
The screenshot displays the PeopleSoft CRM interface for a Service Order. The left-hand navigation menu includes sections like Partners CRM, Products CRM, Sales, Customer Contracts CRM, Orders and Quotes, Pricing Configuration, Service Management, Support, HelpDesk, FieldService, Workforce, Items CRM, Correspondence, Set Up CRM, Solutions, Enterprise Components, and Worklist. The main content area shows the Service Order details for customer Michael Brown, with a status of 'Open'. The 'Notes' tab is selected, and a callout box highlights the 'Add Attachment' link in the 'Associated Activity' section.

Slide 34

Slide notes:

Text Captions: Click the Add an Attachment link

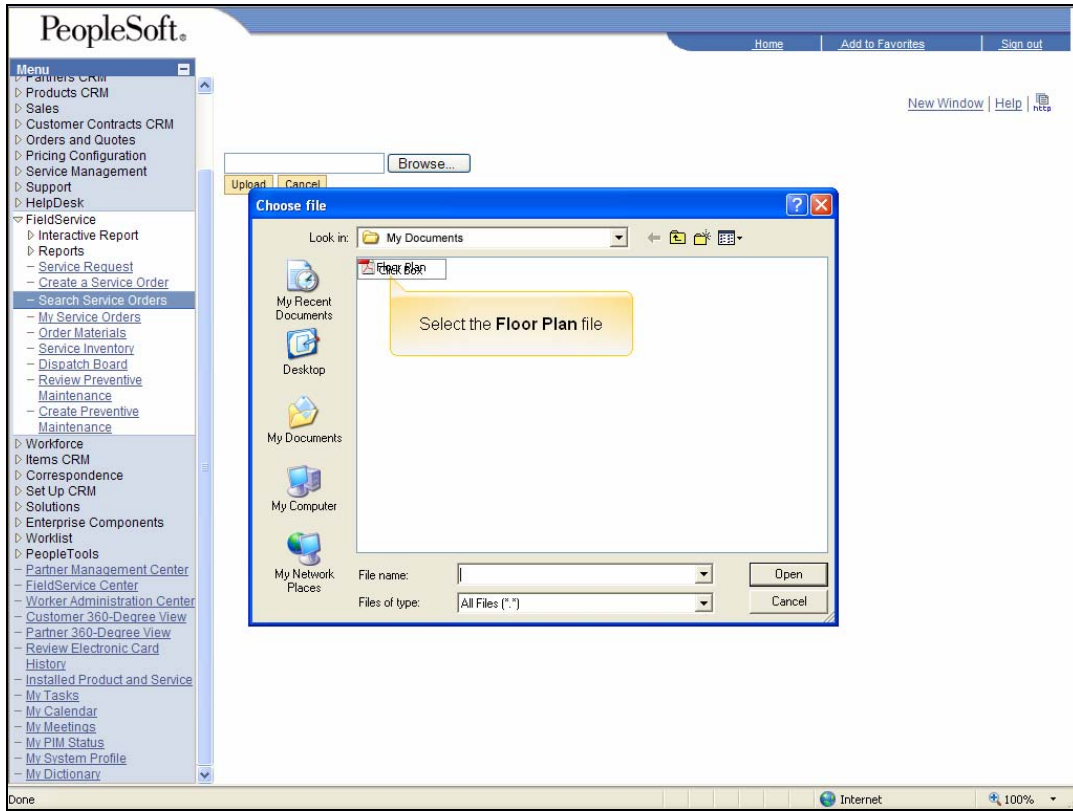




Slide 35

Slide notes:

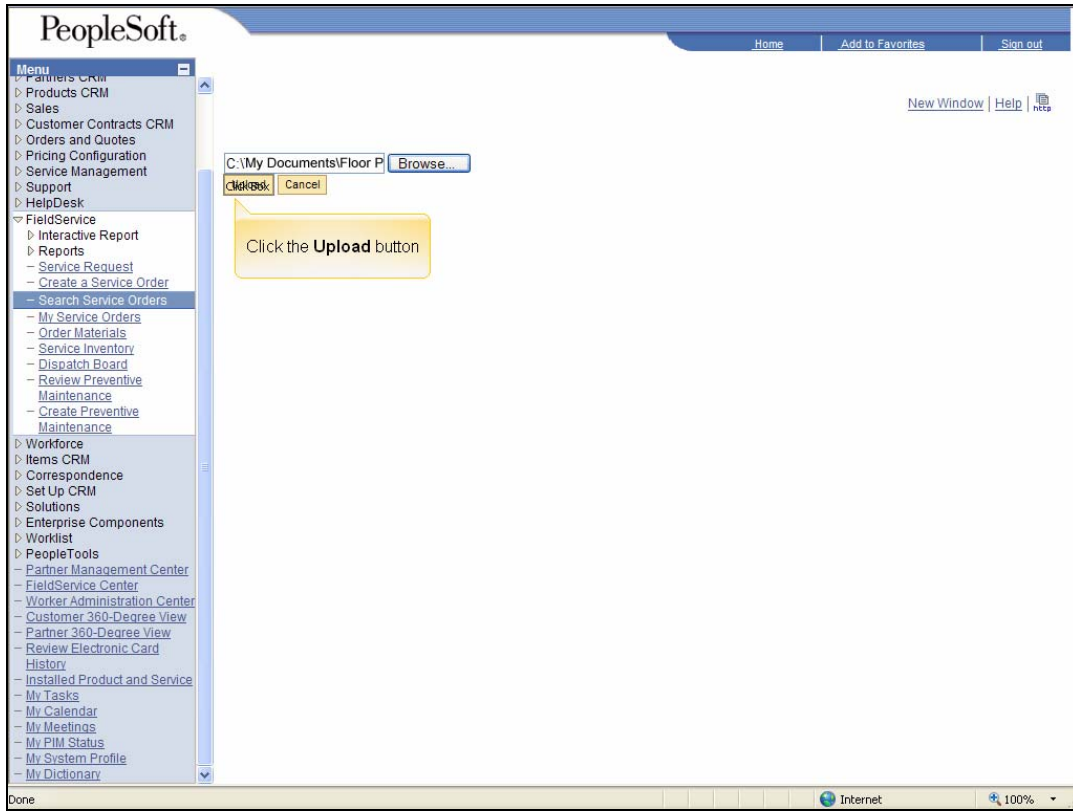
Text Captions: Click the Browse button



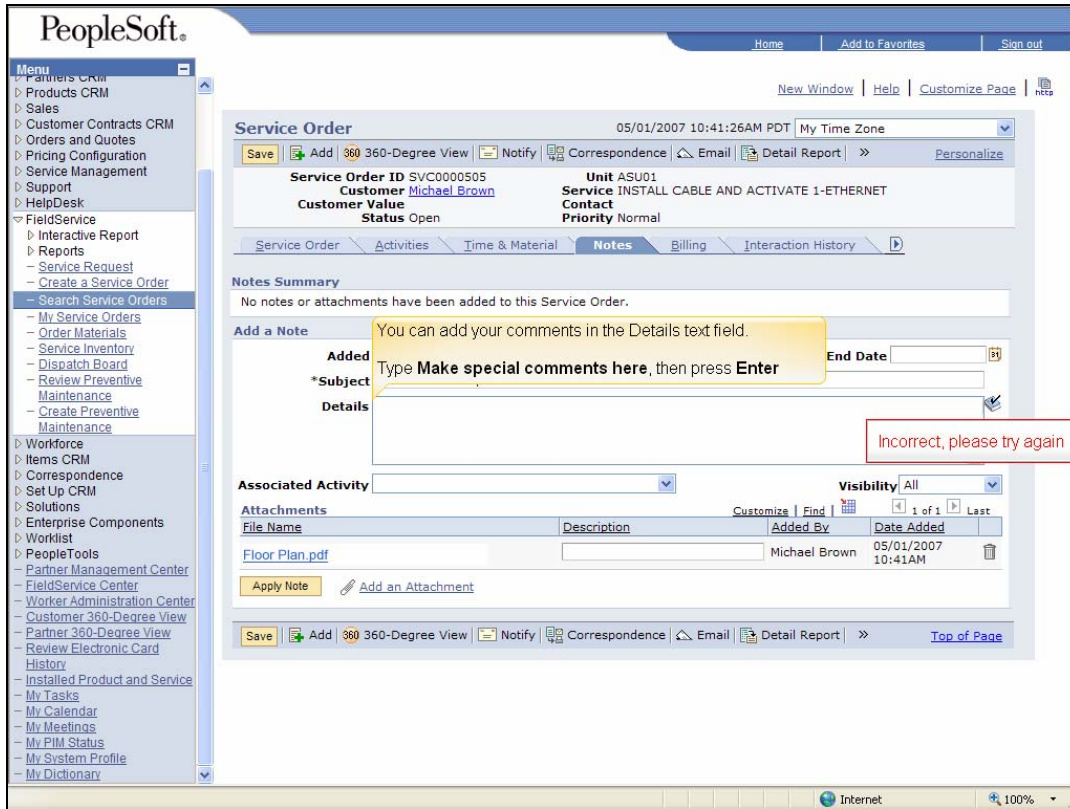
Slide 36

Slide notes:

Text Captions: Select the Floor Plan file



Slide 37
Slide notes:
Text Captions: Click the Upload button



Slide 38

Slide notes:

Text Captions: Incorrect, please try again

You can add your comments in the Details text field.

Type **Make special comments here**, then press **Enter**

PeopleSoft.

Home | Add to Favorites | Sign out

New Window | Help | Customize Page | Help

Service Order 05/01/2007 10:41:26AM PDT [My Time Zone]

Save | Add | 360-Degree View | Notify | Correspondence | Email | Detail Report | Personalize

Service Order ID SVC0000505 Unit ASU01
Customer Michael Brown Service INSTALL CABLE AND ACTIVATE 1-ETHERNET
Customer Value Status Open Contact Priority Normal

Service Order | Activities | Time & Material | **Notes** | Billing | Interaction History | D

Notes Summary
No notes or attachments have been added to this Service Order. Click to see additional tabs

Add a Note

Added 05/01/2007 10:41AM Michael Brown Start Date End Date

*Subject Here is the floor plan

Details Make special comments here

Associated Activity Visibility All

Attachments

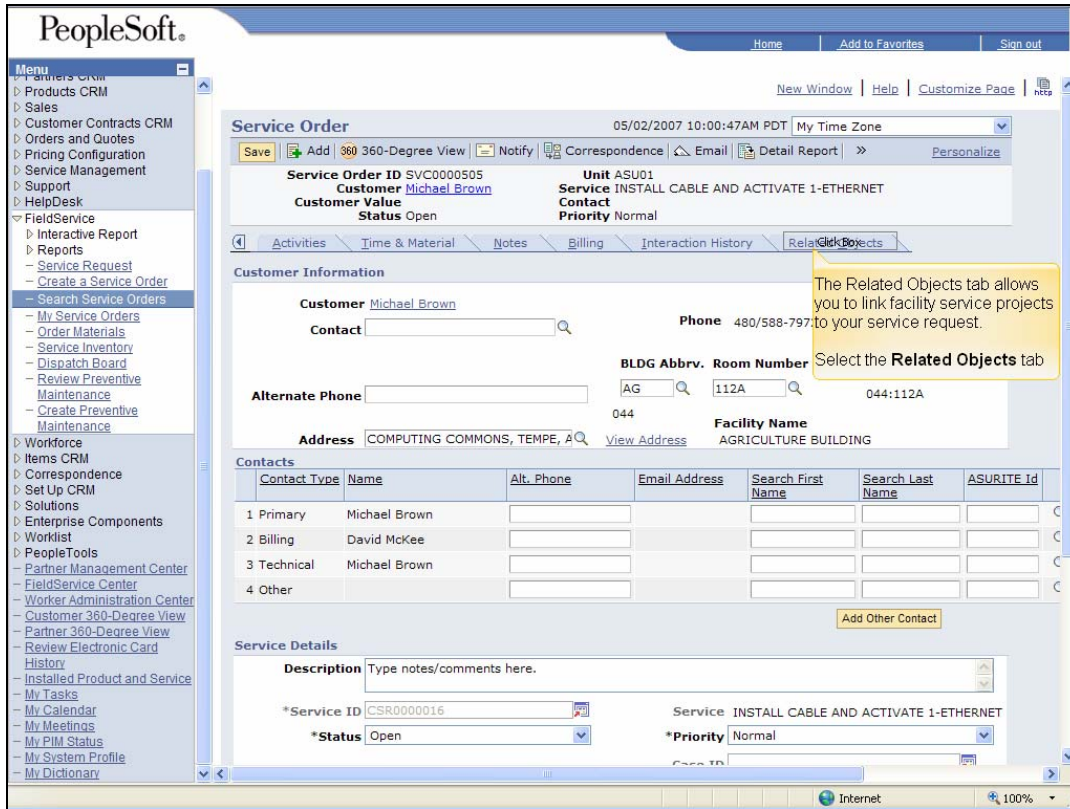
File Name	Description	Added By	Date Added
Floor Plan.pdf		Michael Brown	05/01/2007 10:41AM

Apply Note | Add an Attachment

Save | Add | 360-Degree View | Notify | Correspondence | Email | Detail Report | Top of Page

Slide 39
Slide notes:
Text Captions: Click to see additional tabs



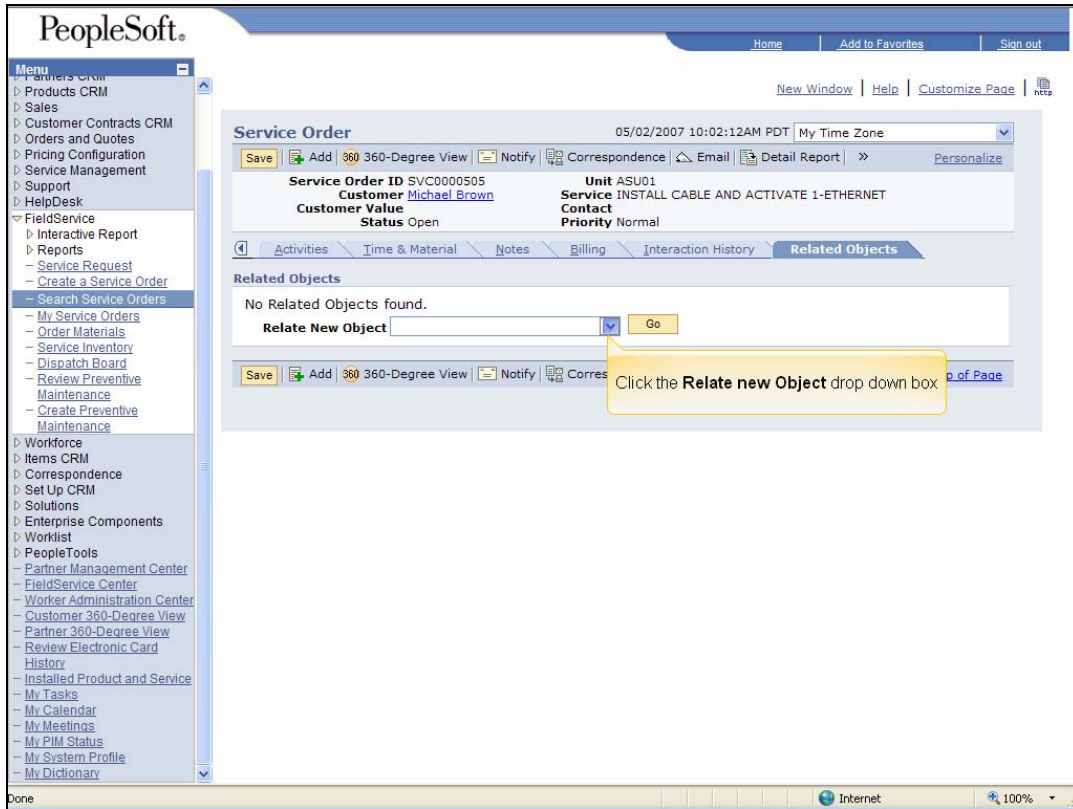


Slide 40

Slide notes:

Text Captions: The Related Objects tab allows you to link facility service projects to your service request.

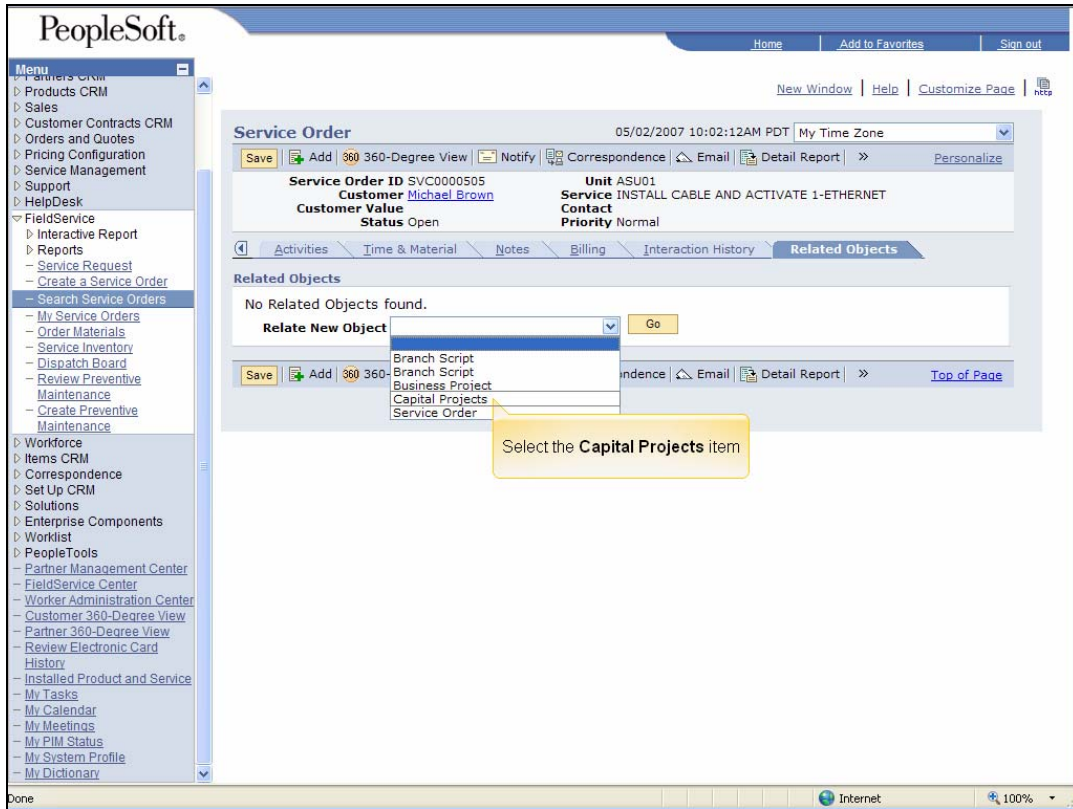
Select the Related Objects tab



Slide 41

Slide notes:

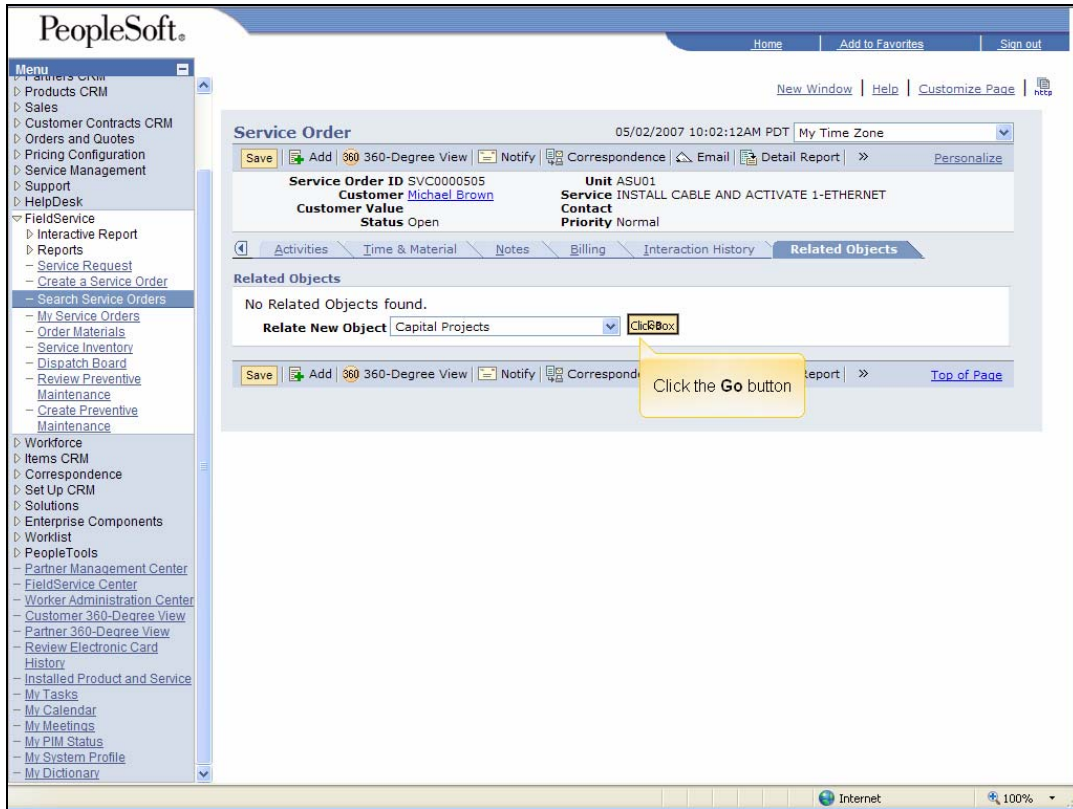
Text Captions: Click the Relate new Object drop down box



Slide 42

Slide notes:

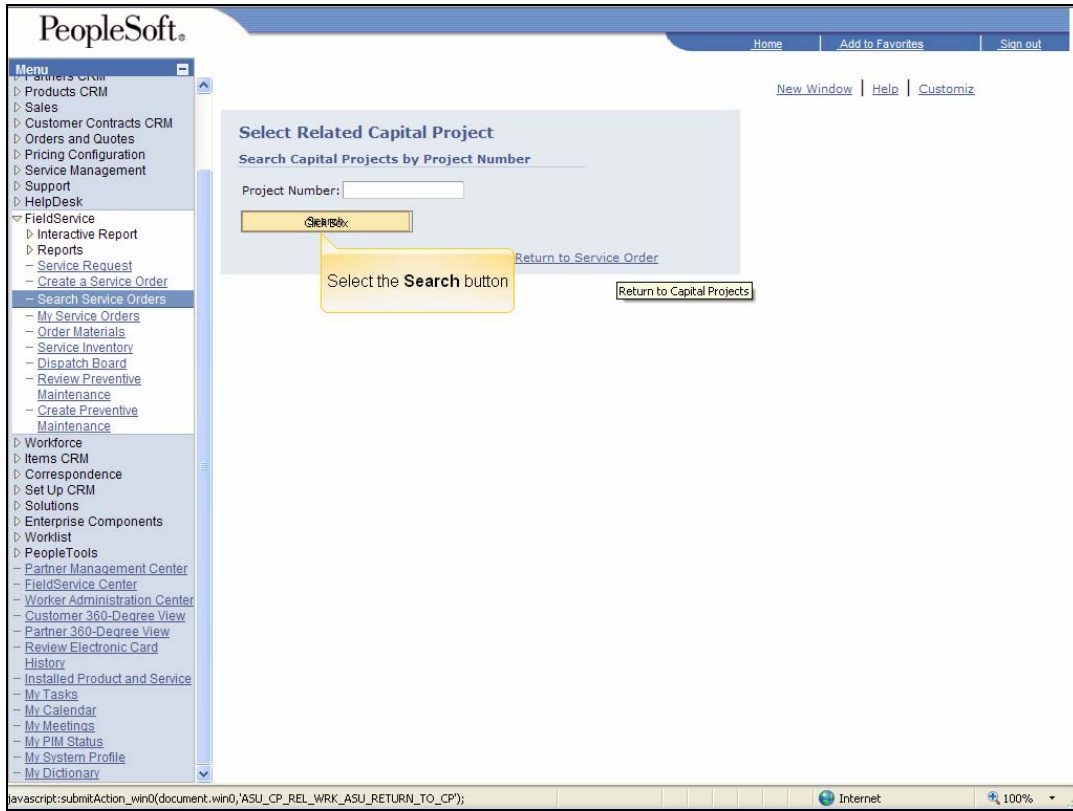
Text Captions: Select the Capital Projects item



Slide 43

Slide notes:

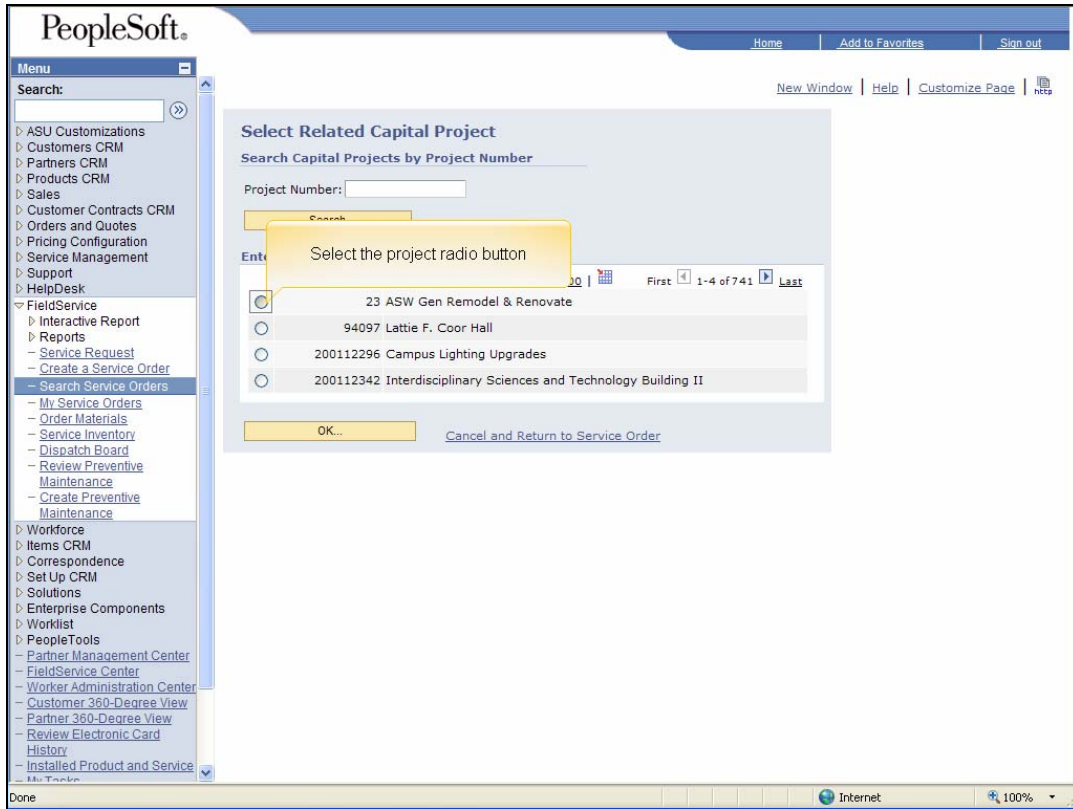
Text Captions: Click the Go button



Slide 44

Slide notes:

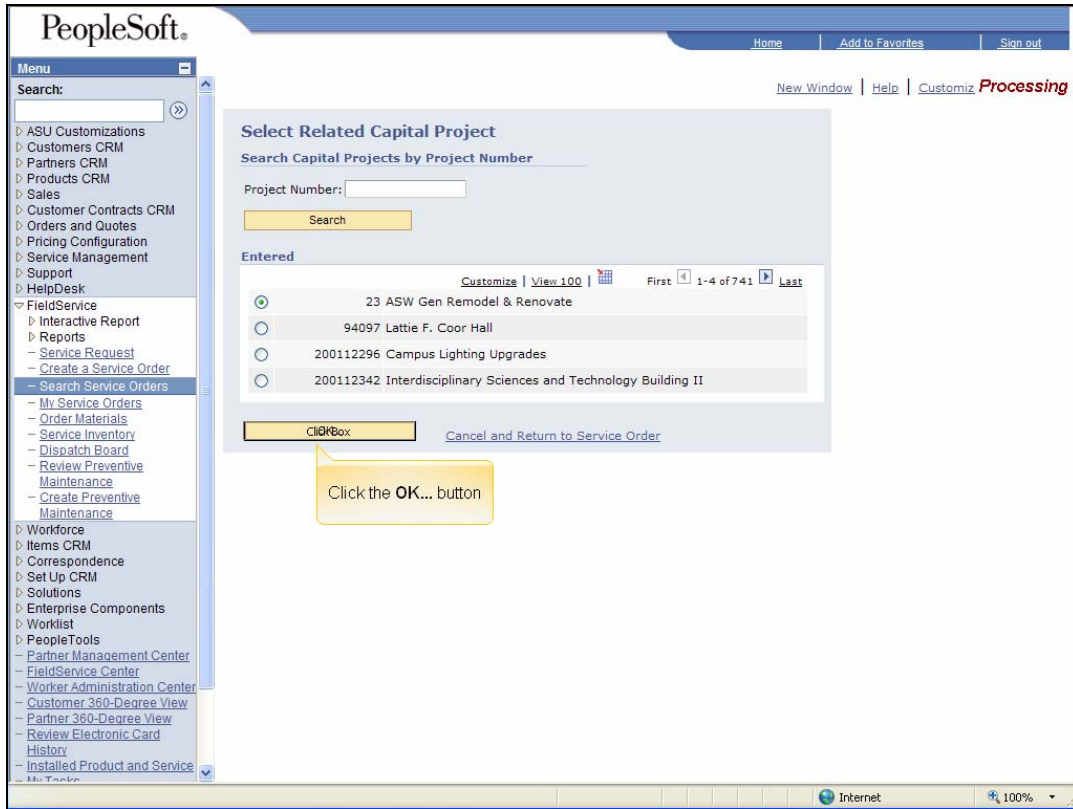
Text Captions: Select the Search button



Slide 45

Slide notes:

Text Captions: Select the project radio button



Slide 46

Slide notes:

Text Captions: Click the OK... button

PeopleSoft.

Home | Add to Favorites | Sign out

New Window | Help | Customiz

Service Order 05/04/2007 10:08:50AM PDT My Time Zone

Save | Add | 360 360-Degree View | Notify | Correspondence | Email | Detail Report | Personalize

Service Order ID SVC0000505 Unit ASU01
Customer Value Michael Brown Service INSTALL CABLE AND ACTIVATE 1-ETHERNET
Status Open Contact Priority Normal

Activities | Time & Material | Notes | Billing | Interaction History | Related Objects

Related Objects

Related Action Summary Customize | First 1 of 1 Last

Type	SO ID/Project Number	Problem Summary	Associated Date
Capital Projects	23		05/03/2007 3:45:06PM PDT

Click the Details icon to open the project.

Save | Add | 360 360-Degree View | Notify | Correspondence | Email | Detail Report | Top of Page

javascript:submitAction_win0(document.win0,'DERIVED_RF_NOTE_DETAIL_BTN\$0');

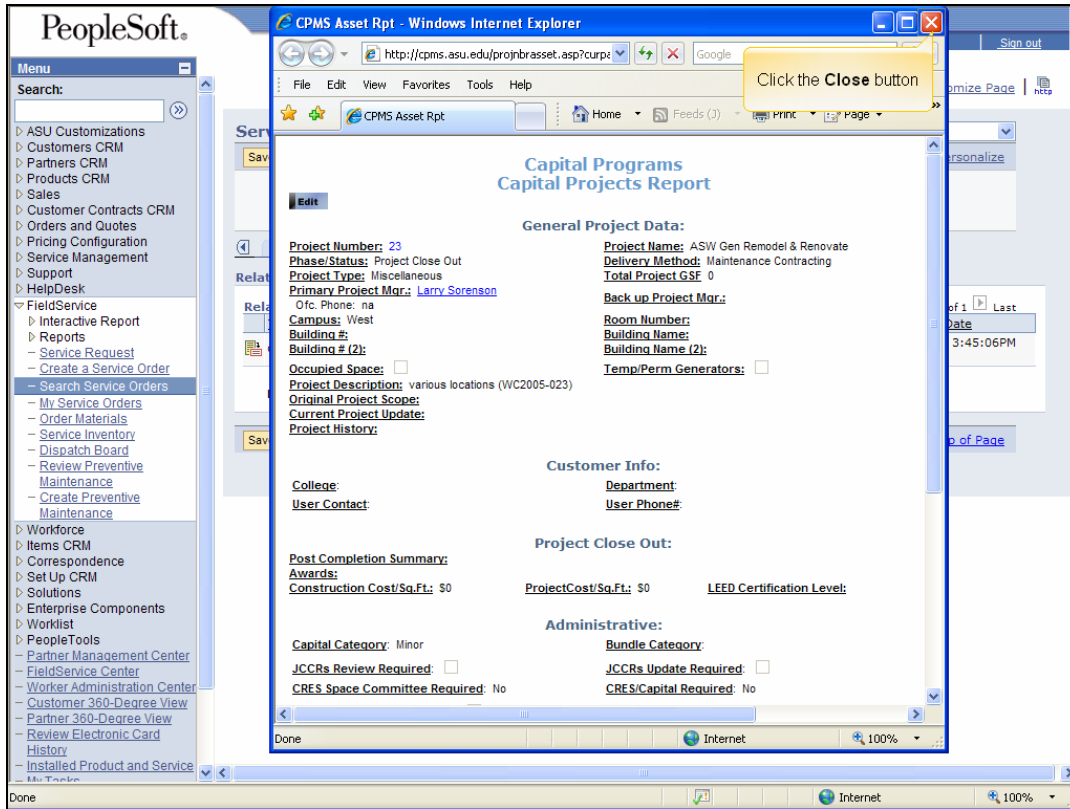
Internet 100%

Slide 47

Slide notes:

Text Captions: Click the Details icon to open the project.





Slide 48
Slide notes:
Text Captions: Click the Close button



The screenshot displays the PeopleSoft CRM Field Service interface. On the left is a navigation menu with categories like ASU Customizations, Customers CRM, Partners CRM, Products CRM, Sales, Customer Contracts CRM, Orders and Quotes, Pricing Configuration, Service Management, Support, HelpDesk, FieldService, Workforce, Items CRM, Correspondence, Set Up CRM, Solutions, Enterprise Components, Worklist, and PeopleTools. The main content area shows a 'Service Order' form for 'Service Order ID SVC0000505' with customer 'Michael Brown' and unit 'ASU01'. The status is 'Open' and the service is 'INSTALL CABLE AND ACTIVATE 1-ETHERNET'. Below the form is a 'Related Objects' section with a table:

Type	SO ID/Project Number	Problem Summary	Associated Date
Capital Projects	23		05/03/2007 3:45:06PM PDT

A yellow callout box with the text 'Click the Save button' points to the 'Save' button in the top left of the form area. The interface also includes a search bar, a menu, and a 'My Time Zone' dropdown at the top right.

Slide 49

Slide notes:

Text Captions: Click the Save button



The screenshot displays the PeopleSoft CRM Field Service interface. The top navigation bar includes 'Home', 'Add to Favorites', and 'Sign out'. The left sidebar contains a 'Menu' with various options such as 'ASU Customizations', 'Customers CRM', 'Partners CRM', 'Products CRM', 'Sales', 'Customer Contracts CRM', 'Orders and Quotes', 'Pricing Configuration', 'Service Management', 'Support', 'HelpDesk', 'FieldService', 'Interactive Report', 'Reports', 'Service Request', 'Create a Service Order', 'Search Service Orders', 'My Service Orders', 'Order Materials', 'Service Inventory', 'Dispatch Board', 'Review Preventive Maintenance', 'Create Preventive Maintenance', 'Workforce', 'Items CRM', 'Correspondence', 'Set Up CRM', 'Solutions', 'Enterprise Components', 'Worklist', 'PeopleTools', 'Partner Management Center', 'FieldService Center', 'Worker Administration Center', 'Customer 360-Degree View', 'Partner 360-Degree View', 'Review Electronic Card History', and 'Installed Product and Service'. The main content area shows a 'Service Order' for 'SVC0000505' with customer 'Michael Brown' and unit 'ASU01'. The service description is 'INSTALL CABLE AND ACTIVATE 1-ETHERNET'. Below this, there are tabs for 'Activities', 'Time & Material', 'Notes', 'Billing', 'Interaction History', and 'Related Objects'. The 'Related Objects' section displays a table with columns 'Type', 'SO ID/Project Number', 'Problem Summary', and 'Associated Date'. A single entry is shown: 'Capital Projects' with SO ID '23' and date '05/03/2007 3:45:06PM PDT'. A 'Relate New Object' dropdown is set to 'Capital Projects'. A large orange-bordered box with the text 'Congratulations! You have completed this practice exercise.' is overlaid on the bottom half of the screen. The bottom status bar shows 'Internet' and '100%' zoom.

Slide 50

Slide notes:

Text Captions: Congratulations! You have completed this practice exercise.

