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
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.
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.
Slide 5

Slide notes:

Text Captions: Select the INSTALL CABLE AND ACTIVATE check box
Slide 6

Slide notes:
Text Captions: Click the scroll bar
Slide 7
Slide notes:
Text Captions: Click the Finalize Request button
Slide 8
Slide notes:
Text Captions: Click the Building Abbv. look up icon
Slide 9
Slide notes:
Text Captions: Click to scroll down
Slide 10

Slide notes:
Text Captions: Select the AG link
If the service requires multiple room locations, leave the Room Number field blank; enter all the room number in the Notes/Comments field.
Slide 12

Slide notes:
Text Captions: Select the 112A link
Text Captions: Click the Payment Method drop down

Let's look at the 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.
Select the Other item

Text Captions: Select the Other item
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
Slide 17
Slide notes:
Text Captions: Click the Search First Name field for Billing Contact
In this practice session, we will put David McKee as the contact person for billing.

Type david, then press Enter
Type mckee in the Search Last Name field, then press Enter.
**Slide 20**

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

---

**Finalize Service Request**

Prepare this request for submission

**Notes/Comments**

Type notes/comments here.

---

**Services Requested**

<table>
<thead>
<tr>
<th>Service</th>
<th>Service Order ID</th>
<th>Coordinator</th>
<th>SD Status</th>
<th>Number Requested</th>
<th>Price</th>
<th>Line Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 CDX CATV CONNECTION</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>$725.00</td>
<td>$725.00</td>
</tr>
<tr>
<td>2 INSTALL CATV Cable and \</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>$725.00</td>
<td>$725.00</td>
</tr>
<tr>
<td>ACTIVATE 1-ETH \</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total Estimated Cost** $725.00

---

**Contacts**

<table>
<thead>
<tr>
<th>Contact Type</th>
<th>Name</th>
<th>Alt. Phone</th>
<th>Alt. Email</th>
<th>Search First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Primary</td>
<td>Michael Brown</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Billing</td>
<td>David McLean</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Technical</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Waiting for: https://asaulab.nv.edu/pe/awesom/CRM/CRM/ABP_SERVICE_ORDER_ASU_0001.png
Slide 21

Slide notes:
Text Captions: Select the name from the list
Slide 22
Slide notes:
Text Captions: Click to scroll to the right
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
Slide 24
Slide notes:
Text Captions: Click to scroll down
Click the Save 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.
You are about to submit a service request that will be sent to the technical team. Do you wish to continue?

Text Captions: Click the Yes button
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.
Slide 30
Slide notes:
Text Captions: Click the OK button
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.
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
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
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
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
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
Text Captions: Click the OK... button
Slide notes:
Text Captions: Click the Details icon to open the project.
Slide 48
Slide notes:
Text Captions: Click the Close button
Slide 49

Slide notes:
Text Captions: Click the Save button
Slide 50

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