

# INTRODUCING AN ENHANCED MYFSU SERVICE CENTER EXPERIENCE

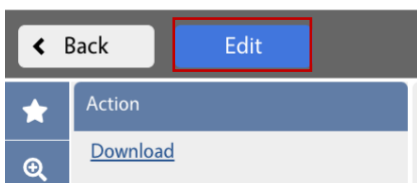
## SENDING ESTIMATES

### Preparing Estimate and sending to customer

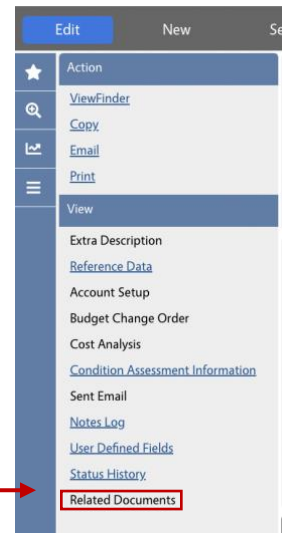
\*Note: A **MUST** be attached as a **PDF** with type "ITS Estimate" AND Work Order status set to "Estimate Ready". The integration will not process to send the estimate to the customer for review if these conditions are not met.

1. From the **Work Order** level, click **Related Documents**
2. Click **Edit**

#### AiM Related Documents



#### AiM Work Order



3. Click **Add**



4. Click **Choose Files** and select the estimate file you want to share with customer  
**Note: File must be a PDF**

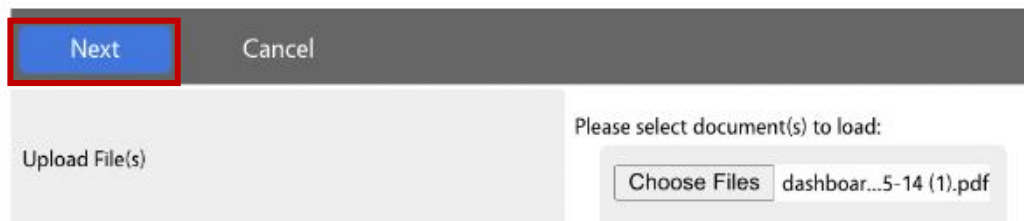
#### AiM New Document



# INTRODUCING AN ENHANCED *MYFSU* SERVICE CENTER EXPERIENCE

## 5. Click **Next**

**AiM** New Document



Next Cancel

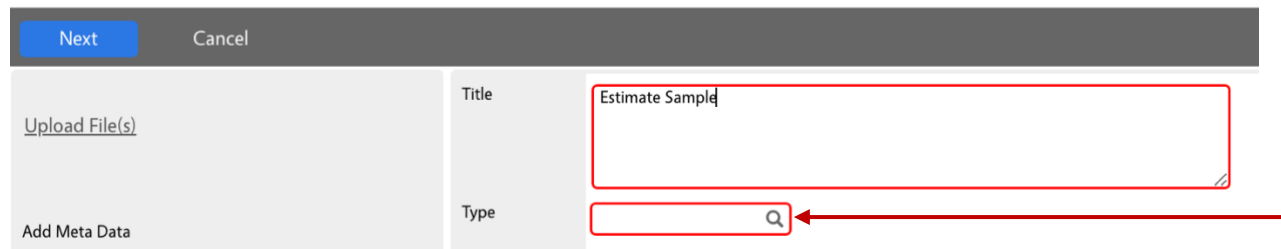
Upload File(s)

Please select document(s) to load:

Choose Files dashboard...5-14 (1).pdf

## 6. Type in the Title of the file and click the **magnifying glass** in the Type field

**AiM** New Document



Next Cancel

Upload File(s)

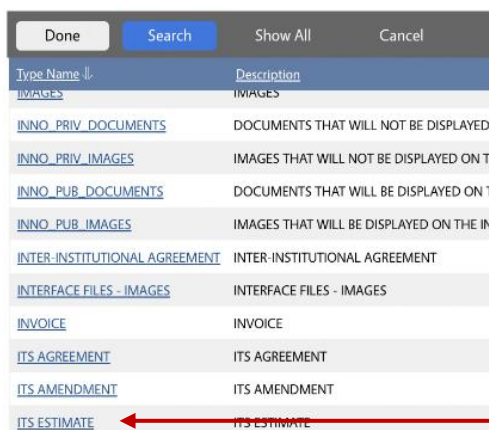
Add Meta Data

Title Estimate Sample

Type  🔍

## 7. From the list, select **ITS Estimate**

*Tip: You can expand the display and navigate through the list at the bottom of the page*

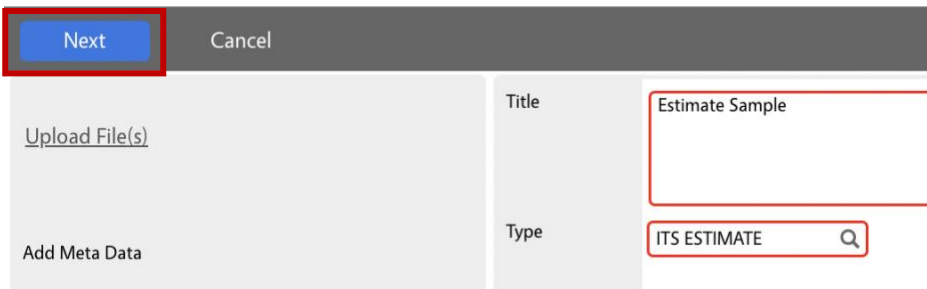


Type Name	Description
IMAGES	IMAGES
INNO_PRIV_DOCUMENTS	DOCUMENTS THAT WILL NOT BE DISPLAYED
INNO_PRIV_IMAGES	IMAGES THAT WILL NOT BE DISPLAYED ON TI
INNO_PUB_DOCUMENTS	DOCUMENTS THAT WILL BE DISPLAYED ON T
INNO_PUB_IMAGES	IMAGES THAT WILL BE DISPLAYED ON THE IN
INTER-INSTITUTIONAL AGREEMENT	INTER-INSTITUTIONAL AGREEMENT
INTERFACE FILES - IMAGES	INTERFACE FILES - IMAGES
INVOICE	INVOICE
ITS AGREEMENT	ITS AGREEMENT
ITS AMENDMENT	ITS AMENDMENT
ITS ESTIMATE	ITS ESTIMATE

# INTRODUCING AN ENHANCED *MYFSU* *SERVICE CENTER* EXPERIENCE

## 8. Click **Next**

### AiM New Document



Next Cancel

Upload File(s)

Add Meta Data

Title Estimate Sample

Type ITS ESTIMATE

## 9. Click **Next** again. Permissions do not need to be set.

### AiM New Document



Next Cancel

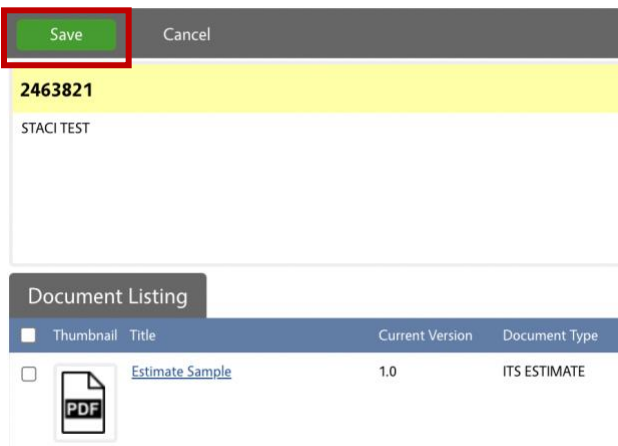
Upload File(s)

Permissions

Role	Description
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## 10. Click **Save**. Uploaded document appears in document list

### AiM Related Documents




Save Cancel

2463821

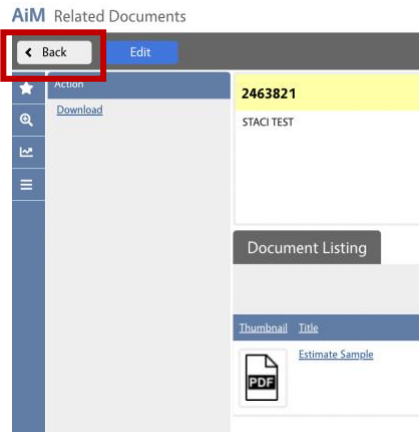
STACI TEST

Document Listing

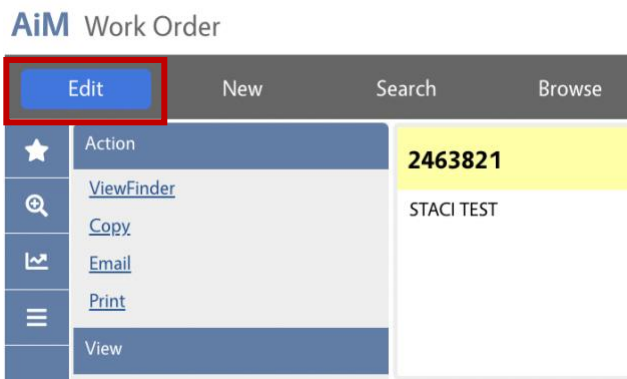
Thumbnail	Title	Current Version	Document Type
<input type="checkbox"/>	 Estimate Sample	1.0	ITS ESTIMATE

# INTRODUCING AN ENHANCED *MYFSU* *SERVICE CENTER* EXPERIENCE

11. Click **Back** to return to the Work Order



12. Click **Edit**



13. Click the **magnifying glass** in the **Status** field



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## 14. Click **ESTIMATE READY**

### AiM Work Order Status

Done	Search	Show All	Cancel
Sequence	Status	Description	
100	<a href="#">NEW</a>	STARTING STATUS FOR INCOMIN	
200	<a href="#">WAITING INTERNAL</a>	INITIAL WORK ORDER STATUS W	
250	<a href="#">ESTIMATE READY</a>	ESTIMATE READY - REQUEST	

## 15. Click **Save**

### AiM Work Order

<b>Save</b>	Cancel
View	<b>2463821</b>
Extra Description	STACI TEST
<a href="#">Reference Data</a>	
Account Setup	

## What Happens Next?

Work Order status will appear as **Estimate Ready** until the API captures the information and sends the estimate to the customer for review via the myFSU Service Center. Once it has successfully sent to Salesforce for review, the Work Order status will change to **Estimate Sent** and will remain in that status until a response is received from the customer.

**\*Reminder: For this process, a file MUST be attached with type "ITS Estimate" AND Work Order status set to "Estimate Ready". The integration will not process to send the estimate to the customer for review if both conditions are not met.**