

INTRODUCING AN ENHANCED *MYFSU* SERVICE CENTER EXPERIENCE



Work Order Status

Statuses can be used to communicate where a ticket is in the request lifecycle. The status of a Work Order is the highest level and indicates the status of the overall work. Changes to the Work Order Status can trigger automations to communicate with the customer in Salesforce. This can also happen in reverse, where automations may also trigger changes in Statuses in AiM.

Below is a list of the Status options and when you may see or use them.

Status	Description
<i>NEW</i>	Starting status for incoming requests
<i>WAITING INTERNAL</i>	Initial work order status while initial details are discovered; Estimate is being created internally
<i>ESTIMATE READY</i>	Complete estimate is attached as a related document and ready to be sent to the customer in Salesforce
<i>ESTIMATE SENT</i>	Estimate complete and sent to Salesforce system
<i>EST IN QUESTION</i>	Estimate needs to be reviewed by technician based on feedback from customer
<i>EST APPROVED</i>	Estimate is approved; Work can be scheduled
<i>POST60</i>	No approval of estimate for 60 days; Needs review
<i>SCHEDULED</i>	Work scheduled for a future date; used for planning
<i>WORK IN PROGRESS</i>	Work is in progress by shop person
<i>WAITING ON CUSTOMER</i>	Waiting on feedback from campus customer before work order can be completed
<i>APPROVAL READY</i>	Initial work completed; ready to be approved by customer
<i>APPROVAL SENT</i>	Approval ready to be shared with customer and sent to Salesforce system
<i>WORK IN QUESTION</i>	Work needs to be reviewed by technician based on feedback from customer
<i>WORK APPROVED</i>	Work is approved by customer in Salesforce
<i>NO CUST REPLY</i>	No response by customer on approval of work
<i>AWAITING REVIEW</i>	Work is complete and ready to be reviewed in FisOps team
<i>READY FOR BILLING</i>	Work is complete and customer approved the completed work
<i>COMMENT READY</i>	Comment/Notes are ready to be sent to Customer in Salesforce
<i>COMMENT SENT</i>	Comment/Notes has been sent to Customer in Salesforce

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Phase Status

Statuses can be used to communicate where a ticket is in the request lifecycle. The status of a Phase is at the task level and indicates the status of the work for that specific Phase. While the Work Order Status is important to the communication with the customer, Phase Status is used internal.

Below is a list of the Status options and when you may see or use them.

Status	Description
<i>NEW</i>	Phase has not been assigned; default status
<i>INQUIRY</i>	Question on a topic only; No billable service
<i>ASSIGNED</i>	Phase is assigned to shop person to complete task
<i>ESTIMATE NEEDED</i>	Estimate is needed on the associated phase, Could be optional
<i>ESTIMATE READY</i>	Estimate is attached in Related Documents and ready to be sent to customer
<i>EST IN QUESTION</i>	Estimate needs to be reviewed by technician based on feedback from customer
<i>EST APPROVED</i>	Estimate is approved; work can be assigned to begin
<i>WORK IN PROGRESS</i>	Work is in progress by shop person
<i>WAITING ON CUSTOMER</i>	Waiting on feedback from campus customer before phase can be completed
<i>WAITING INTERNAL</i>	Waiting on ITS or holding before phase can be completed
<i>WAITING INVENTORY</i>	Waiting on inventory before phase can be completed
<i>WAITING VENDOR</i>	Waiting on third-party vendor before phase can be completed
<i>SCHEDULED</i>	Work scheduled for a future date; used for planning
<i>PHASE COMPLETE</i>	Tasks within phase are complete; ready to be reviewed
<i>WORK IN QUESTION</i>	Work is not approved, and needs to be addressed by technician
<i>WORK APPROVED</i>	Work is approved by customer in Salesforce
<i>PROGRESS BILLING</i>	Ongoing projects, only billing individual phase
<i>CLOSED</i>	Work is complete and billing has been processed
<i>CANCELLED</i>	Phase is cancelled internally
<i>REOPEN</i>	Phase is reopened
<i>ROUTED FOR CHANGE</i>	Phase has a change in billing, name, location or quantity
<i>PASS THROUGH</i>	Charges from providers that ITS facilitates for customer payment; No rates associated