SOFA
Siebel Order Fullfulment Application

User Manual B2

Training and Instruction for Using SOFA

Version 1.1

National Archives and
Records Administration (NARA)

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College Park, MD 20740-6001

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Key

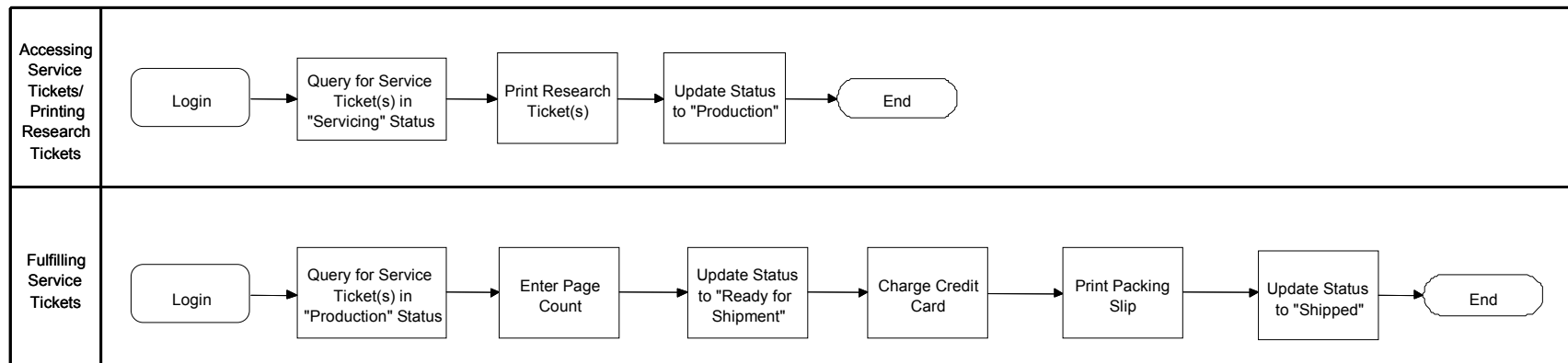| Symbols	Meaning
🖐	Critical information for performing the activity.
💬	Helpful hints for performing an activity.

1 Terminology

Term (SOFA)	Description of Term
Service Ticket	– Breakdown of an order aligned to the business unit that will fulfill the specified line items. An order can contain one or more service tickets. – In SOFA, Research Ticket refers to the printed report that is used when fulfilling a Service Ticket.
Service Ticket Number	– Tracking number for all Service Tickets. This number remains with the record throughout the fulfillment process.
Customer Name	– Field used to capture the Customer's First Name. – Field used to capture the Customer's Middle Initial. – Field used to capture the Customer's Last Name.
Order Comment	– Field (up to 256 characters) used to capture details about the customer's order request.
Description	– Field (up to 2000 characters) used to capture details about a particular line item on an order. This field may be used to identify the specific location of the requested item.
Contact Type: Web Registered User	– Customer who submits orders via Order Online! (Internet).
Research Ticket	– Report that summarizes Service Ticket information that is used to locate a particular record.
Packing Slip	– Report that summarizes a Service Ticket's transaction and accompanies the requested record when shipped.
Site	– Name of the business unit/NARA organization associated with a SOFA record. Field is automatically populated with the site of the user who created the record; the site may be changed as necessary.
Shipping Method	– Indicates the shipping method the customer selects to deliver the requested order. These include Standard Method, Express Mail, Federal Express, UPS Red/Blue, UPS Ground 2nd Day, and US Postal Service. The default is Standard Method.
Shipping Account #	– Field used to capture the account number for the customer's shipping method, if the method is not the Standard Method.

Line Total	– Field used to indicate the cost for one line item on a Service Ticket. The cost is calculated by multiplying the unit cost of the product selected by the Quantity Ordered. Field is automatically updated.
Order Source	– Indicates the method that the order was initiated. Order Source types include Manual Order, Non Quoted Order, Paper Order, Quoted Order, Web Order, and Back Office Order.
Overage Approval	– Field used to indicate that the NARA user has contacted the customer to gain approval to fulfill an order for more than the quantity ordered.
Overage Reason	– Field used to record the customer's approval to fulfill the order for more than the Quantity Ordered. Field is required when the "Overage Approval" box is selected.

2   Process Maps

Accessing Service Tickets/ Printing Research Tickets	Login → Query for Service Ticket(s) in "Servicing" Status → Print Research Ticket(s) → Update Status to "Production" → End
Fulfilling Service Tickets	Login → Query for Service Ticket(s) in "Production" Status → Enter Page Count → Update Status to "Ready for Shipment" → Charge Credit Card → Print Packing Slip → Update Status to "Shipped" → End

3 Before You Begin

Enable Pop-Ups for SOFA

The Web browser will need to allow pop-ups so SOFA can display important information and functionality. The following describes what you should do if you use either the Google or Yahoo Toolbar with Internet Explorer.

> *SOFA should be accessed only through Internet Explorer.*
>
> *Ensure other popup blockers that are installed on the computer allow pop-ups (e.g. Stopzilla).*

Uninstalling Google's Toolbar

Certain versions of the Google Toolbar can interfere with the functionality of SOFA. If the Google Toolbar is installed, it should be uninstalled before using SOFA. Follow the steps below uninstall the Google Toolbar.
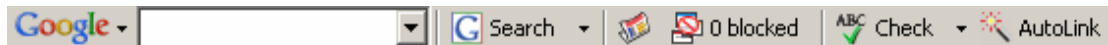
1. Close all open Internet Explorer browser windows.

2. Click on the **Start** button and select **Control Panel**.

The Control Panel appears.
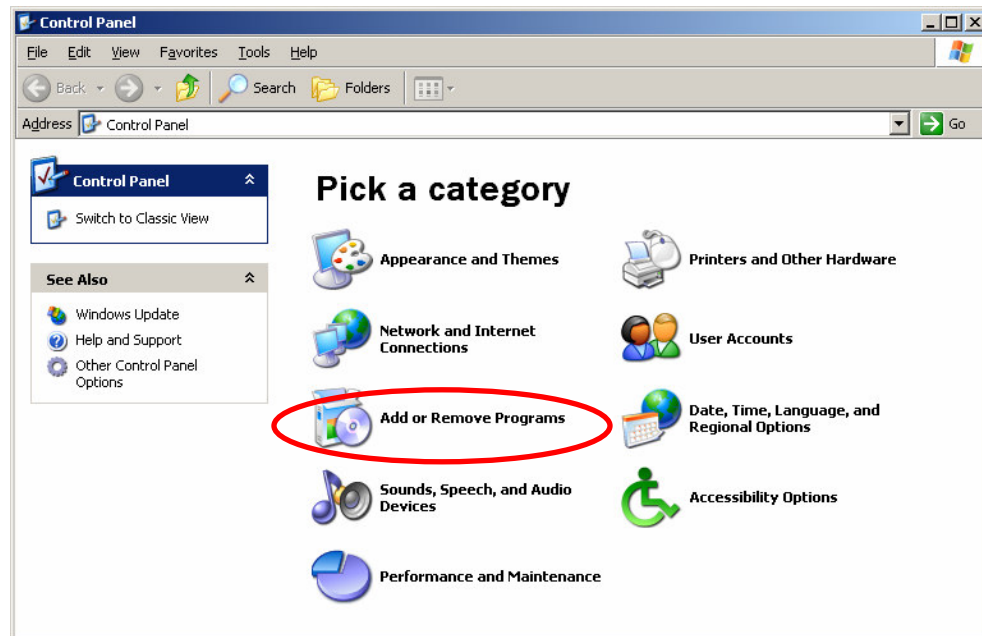
3. Select **Add or Remove Programs**.

The Add or Remove Programs pop-up appears.
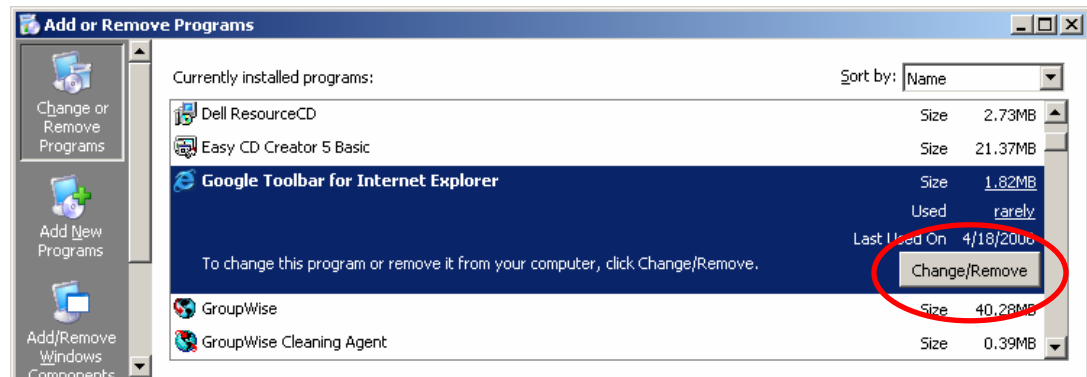
4. Select **Google Toolbar for Internet Explorer** and click **Change/Remove**.

   If "Google Toolbar for Internet Explorer" is not listed, then the Google Toolbar is not installed on the computer and no further action is required.

   The Google Toolbar is now uninstalled.

Yahoo's Toolbar

1. Select the target to the right of the "Search Web" drop down menu and ensure the "Enable Pop-up Blocker" is not checked

   If checked, click on **Enable Pop-up Blocker**
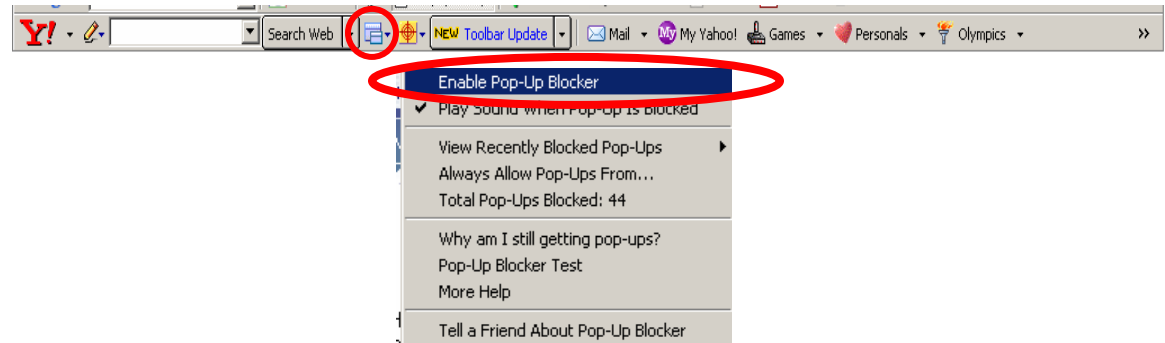
After completing the above steps, the Yahoo Toolbar will allow pop-ups.

This action will need to be repeated if the user clears their browser's cache.

Install Siebel Option Pack for Internet Explorer

The first time users log into SOFA a pop-up will prompt you to install the IE Siebel Option Pack. Internet Explorer will not allow SOFA to function without installation of this Option Pack.

1. **Log In** to the SOFA application as stated above.

2. Check the *"Always trust content from SIEBEL SYSTEMS, INC"* box.

3. Click the "Yes" button to install the Option Pack.
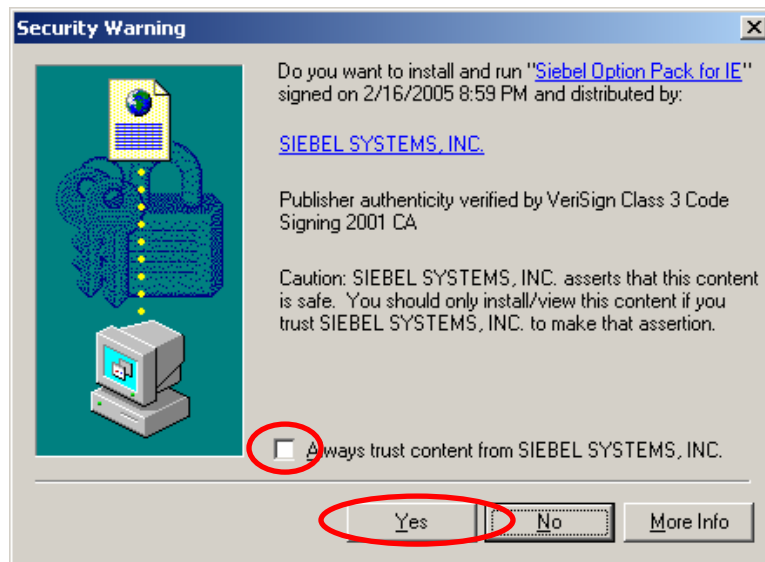
If the following pop up appears on screen please contact the NARA helpdesk..
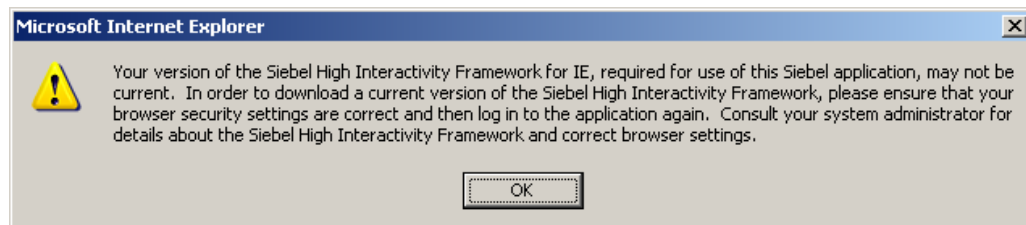
4 Getting Started

Login to SOFA

1. Go to the SOFA Web site. The SOFA application can be directly accessed through [SOFA URL TBD].

2. Type the user name into the "User ID" field.

3. Type the password into the "Password" field.

4. Press enter or click the **Log In** button.

The SOFA *Home* Screen Tab appears.

Do not use the Internet Explorer navigation buttons/arrows.

Change Password

Users can change their existing password from the *User Profile* Screen Tab.

1. Click the **Site Map** button.
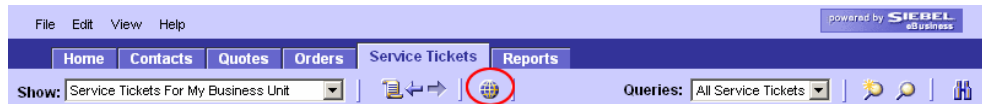
2. Click the **Profile** link.

The *User Profile* Screen Tab appears on the screen.
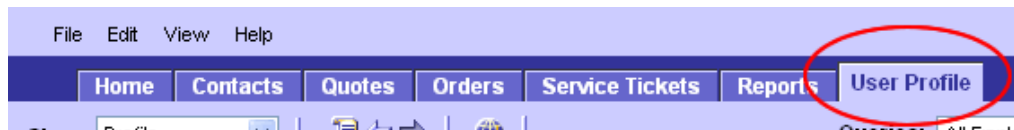
3. Enter your new password in the "Password:" field.

Make sure to adhere to NARA Password guidelines.

4. Re-enter the new password exactly the same way in the "Verify Password:" field.

5. Click the **Save** button.

Customize the Home Screen Tab

The *Home* Screen Tab layout can be customized. Customizing the layout will ensure that the preferred setup is present the next time the user logs into SOFA.

1. Click the **Edit Layout** button.
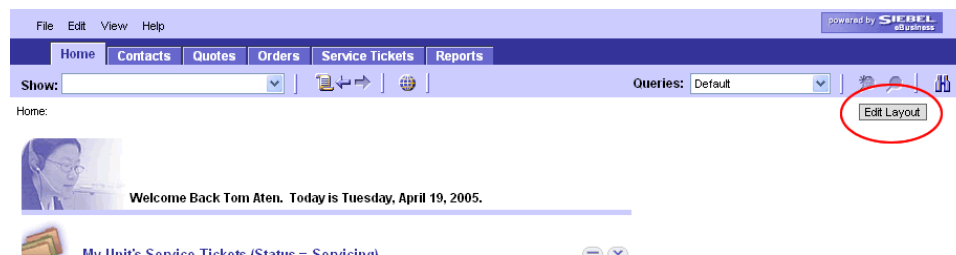
The Edit Layout screen appears.
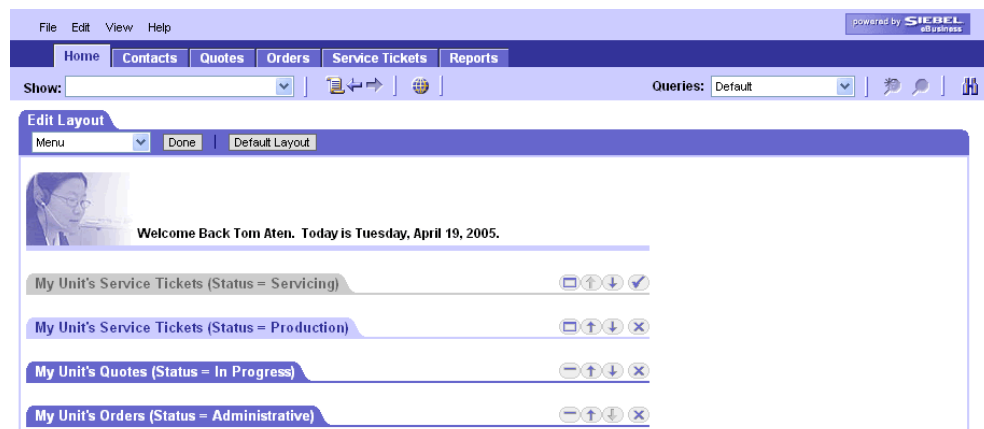
2. From the Edit Layout screen, use the section control buttons to customize the *Home* Screen Tab layout.

☐ The **Expand** and **Collapse** buttons define whether a section's records are displayed on the *Home* Screen Tab as a default.

▪ Click the **Expand** button next to a section to display records.

▪ Click the **Collapse** button next to a section to hide records.

The user can change all of the sections to be expanded or collapsed by selecting the Expand All or Collapse All options from the Edit Layout tab drop down.

☐ The **Show** and **Hide** buttons define whether a section is displayed on the *Home* Screen Tab.

▪ Click the **Show** button next to a section to ensure the section is visible on the *Home* Screen Tab.

▪ Click the **Hide** button next to a section to ensure the section is not displayed on the *Home* Screen Tab.

> *The user can toggle all of the sections to be shown or hidden by selecting the **Hide All Applets** or **Show All Applets** options from the Edit Layout **Menu** drop down.*

☐ The **Move Up** and **Move Down** buttons define the order in which sections will appear on the *Home* Screen Tab.

Click the **Move Up** button next to a section to move the section higher in position on the *Home* Screen Tab.

Click the **Move Down** button next to a section to move the section lower in position on the *Home* Screen Tab.

*It is recommended that you continue to show the tab called **My Unit's Service Tickets (Status= Production & Days in Status>=10).***

3. Click the **Done** button to save the customizations.
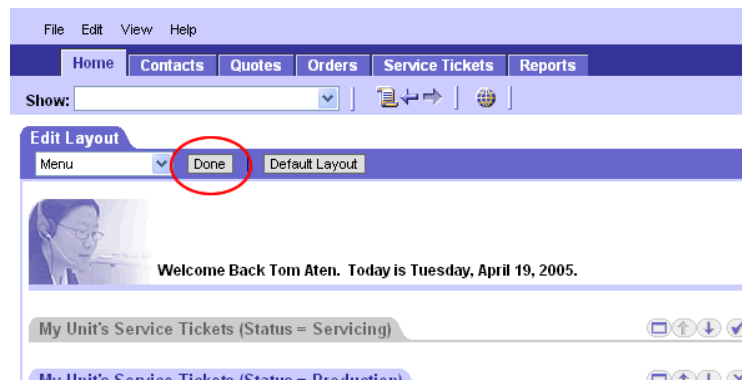
*Click the **Default Layout** button to return all sections to their original layout.*
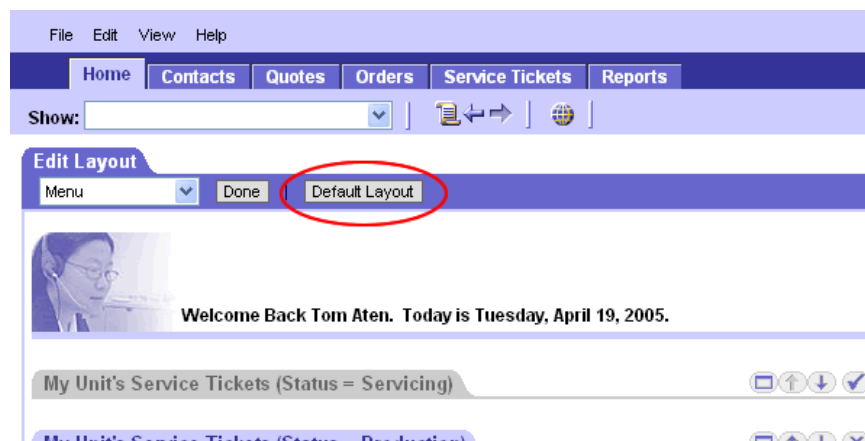
5 SOFA Features
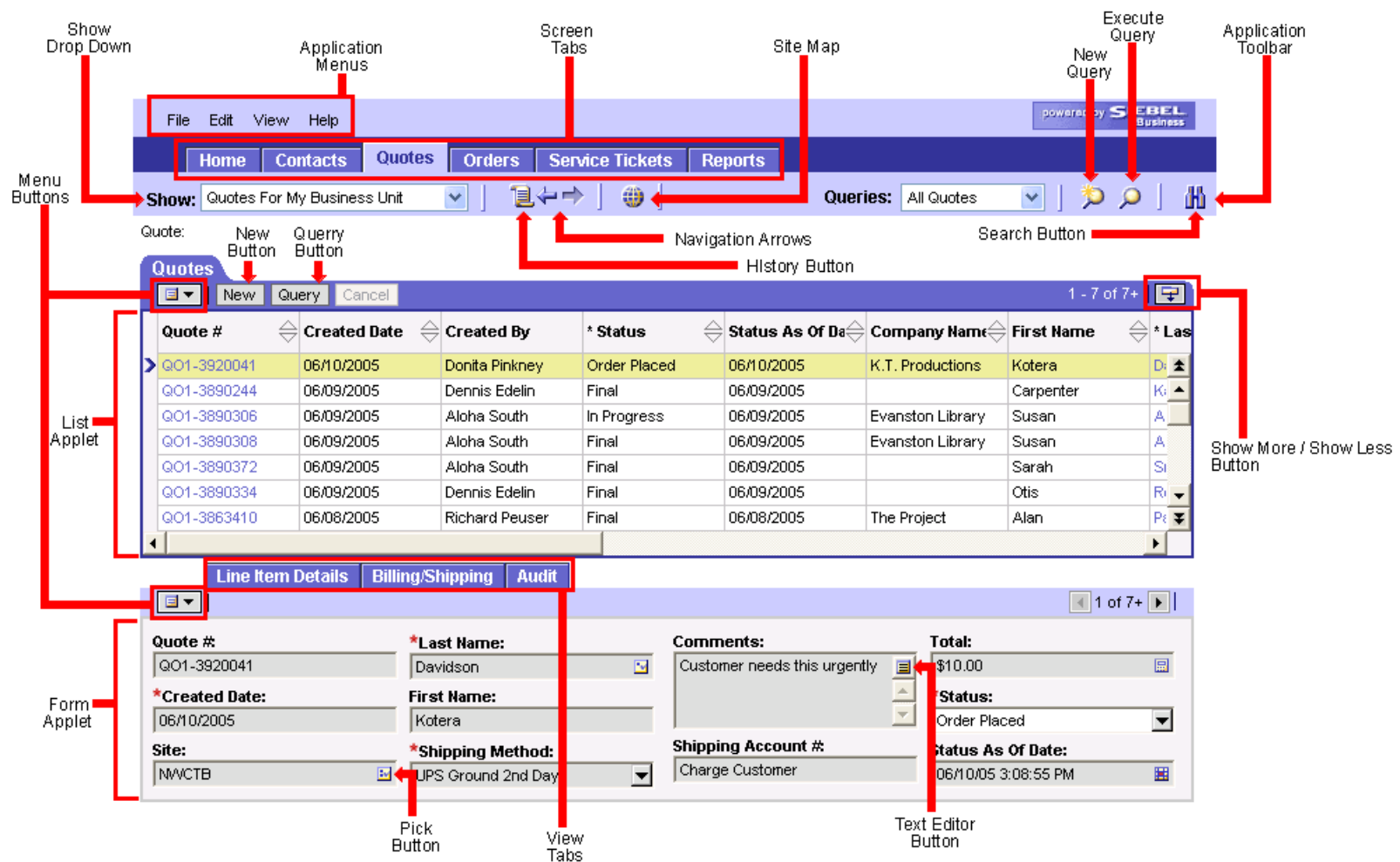
☐ Application Menus – There are four Application Menus, which can be accessed regardless of what page is active. The functionality available in each menu will vary based on which Screen and View Tabs are active. The menus and functionality that may be found in each include:

File: Log Out

Edit: Delete Record, Copy Record, Query

View: Site Map, Reports, Columns Displayed, User Preferences, Search

Help: Contents and Index

☐ Application Toolbar – Tools that are available regardless of what process the user is completing include:

Show drop down – Displays all items for all business units or just those items related to the user's business unit.

Some users may not have the option to display items for all business units.

History button – Displays the history of the pages that have been accessed.

Navigation arrows – Allows the user to move forward and backward between pages that have been accessed in the application. While in SOFA, use these buttons instead of the Internet Explorer navigation buttons.

Site Map button – Displays the organization of pages within SOFA.

Search button – Displays an applet that enables the user to search for records throughout SOFA.

☐ Screen Tabs – The main screens for SOFA include:

Home

Contacts(Not available to all users)

Quotes (Not available to all users)

Orders (Not available to all users)

Service Tickets (Not available to all users)

Reports (Not available to all users)

☐ List Applet – Displays information for a particular set of records.

☐ Form Applet – Displays a form for editing, creating and viewing individual records.

☐ View Tabs – Each screen tab has multiple view tabs, which display editable information related to a specific record. The available view tabs depend on which screen tab is active.

☐ Menu button – Provides functionality appropriate for that applet.

☐ Show more/Show less button –Allows users to view more/fewer rows of information in a list applet.

☐ Text Editor button – Where available, (e.g., Comments) users can click the button in the field to key in additional information.

☐ New button – Creates a new record.

☐ Query button – Displays a blank applet for entering query parameters.

☐ Execute Query button – Executes the query and displays the query results.

☐ New Query button – Displays a blank applet for entering query parameters.

☐ Pick Button – Displays a pop-up containing a list of records.

6 Basic SOFA Functionality
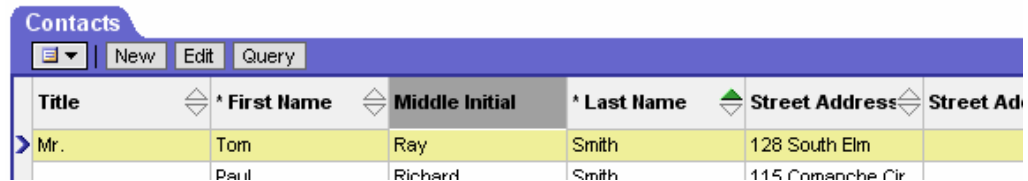
The following reviews basic SOFA functionality.

Columns

Moving Columns

The order that columns are displayed can be changed.
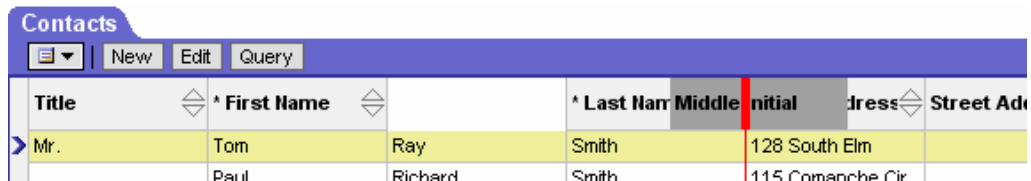
1. Select the column to be moved by left-clicking and holding the column title.

2. Drag the column to the desired location.

    The red line shows where the user will be moving the column.

3. Release the mouse button to place the column in the new location.

Hiding / Displaying Columns

The Columns Displayed pop-up allows users to see what columns are visible or hidden on the screen. Also users can change which columns are visible or hidden through this pop-up.

1. Click the **Menu** button.

2. Select the **Columns Displayed...** menu option.
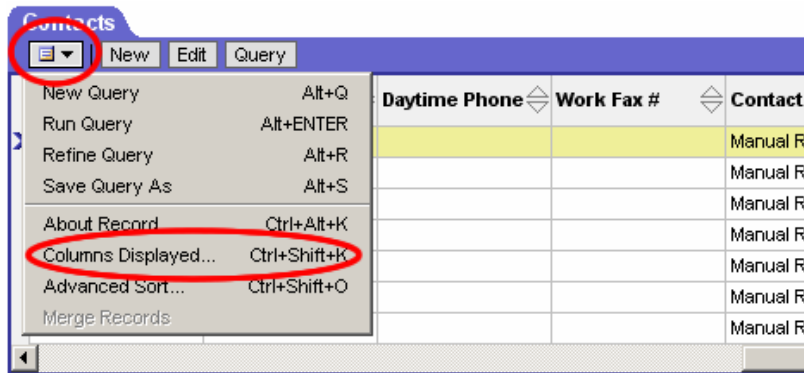
The Columns Displayed pop-up appears.
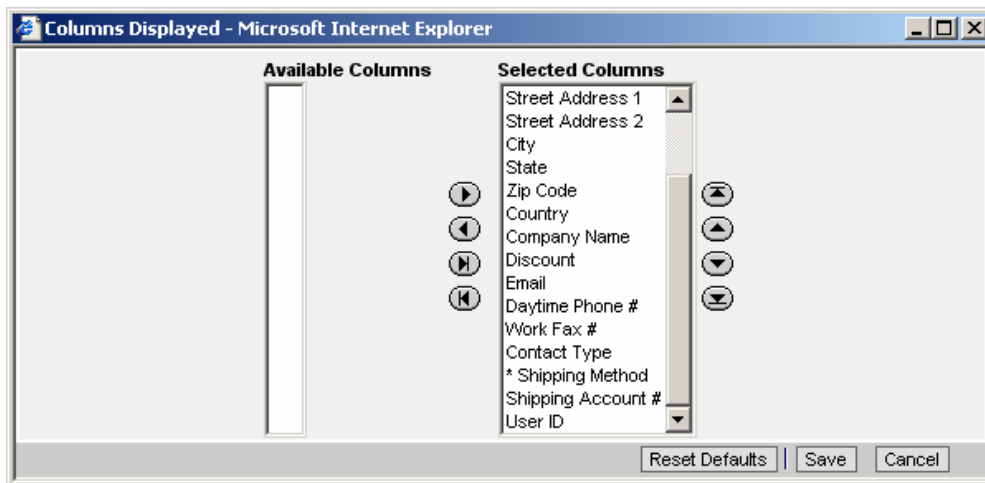
Columns that appear in the "Selected Columns" list are visible in the associated list applet. As shown above, all of the columns for the Contact Screen Tab list applet are displayed.

Columns that appear in the "Available Columns" list are not visible in the associated list applet.

The following procedure will hide columns in the associated list applet:

1. Select the column from the "Selected Columns" list.
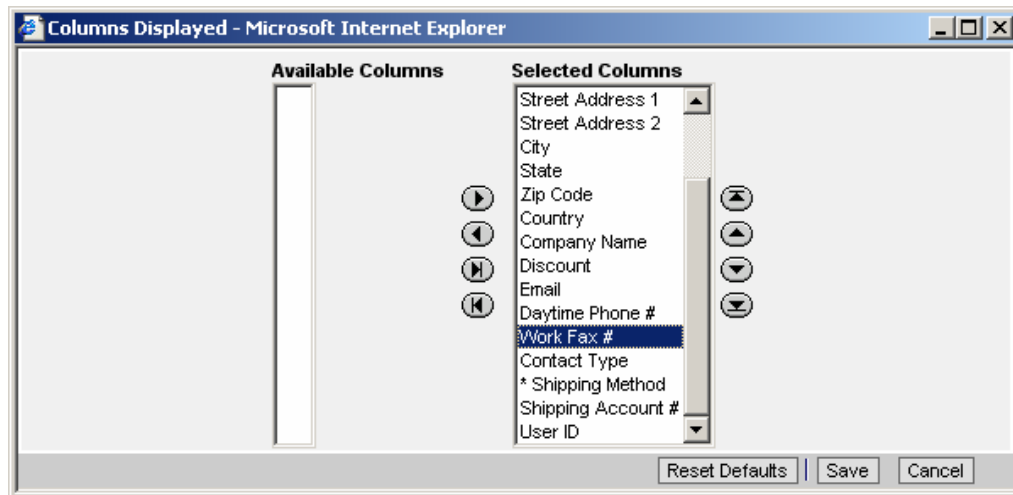
Multiple columns can be selected. Hold down the "Ctrl" key on the keyboard while left clicking on the desired columns with the mouse.

2. Click the **Hide** button (◀) between the "Available Columns" and "Selected Columns" list.

   The selected columns will move from the "Selected Columns" list to the "Available Columns" list.
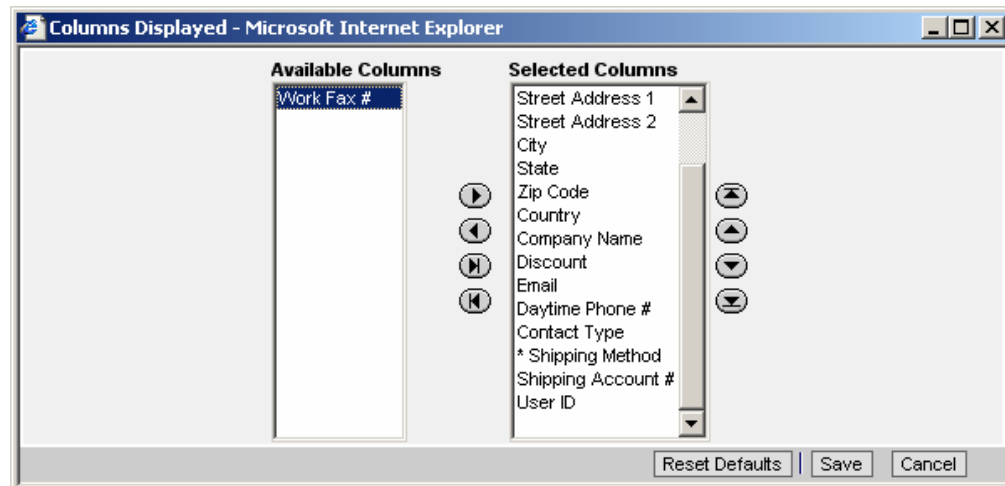
3. Click the **Save** button (Save) in the lower right corner of the pop-up for changes to take effect.

The following procedure will show columns that are not displayed in the associated list applet.

1. Select the column name in the "Available Columns" list that should be displayed in the list applet.
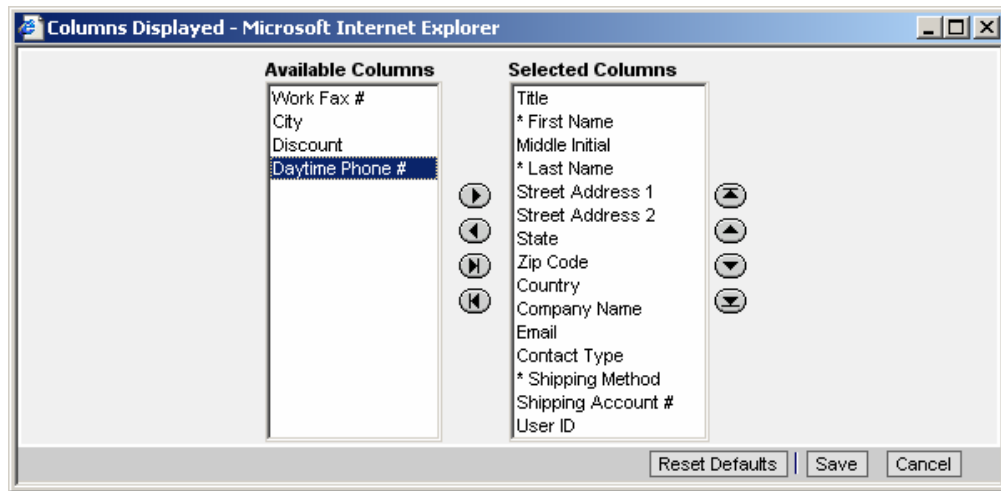
   Multiple columns can be selected. Simply hold down the "Ctrl" key on the keyboard while clicking on the desired columns' names with the mouse.

2. Click the **Show** button (▶) between the "Available Columns" and "Selected Columns" list.

   The selected columns will move from the "Available Columns" list to the "Selected Columns" list.
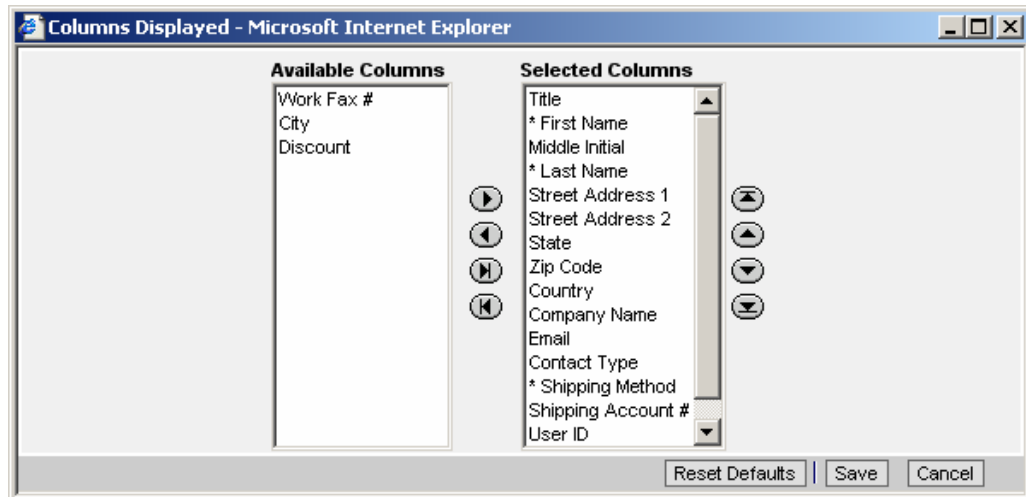
3. Click the **Save** (Save) in the lower right corner of the pop-up for the changes to take effect.

To return columns to their original layout, conduct the following steps:

1. Click **Reset Defaults** button (Reset Defaults) in the lower right corner of the pop-up.

2. Click the **Save** (Save) in the lower right corner of the pop-up for the changes to take effect.

Queries

Perform a Query

Queries allow users to search for specific records within a list applet.

1. Click the **Query** button.

2. Enter the relevant information for the query (e.g., a customer's last name in the "Last Name" column, an order number in the "Order #" column, or the service ticket number in the "Service Ticket #" column).

   Queries in SOFA are case-sensitive. To query for both upper and lowercase, type "~LIKE <space>" before the query information.

   The following example shows a query for a Research Ticket where the first name of the customer is known.
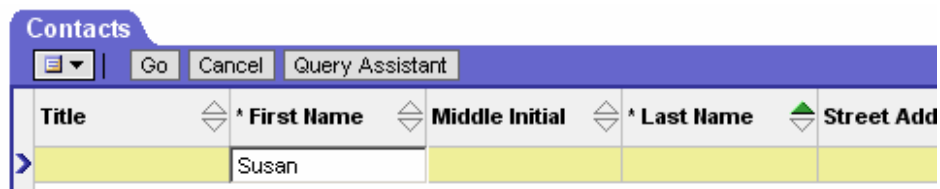
   Queries can be created using more than one column. For example, a query can be created using the customer's first and last name. Increasing the number of fields used to query will help refine the search.

3. Click the **Go** button or press the Enter key to run the query based upon the information supplied.

The records that meet the query criteria are displayed.

Queries can be created using Operators to help locate specific records. The following is a list of query operators:

Operator	Purpose
*	Wildcard. Placed anywhere in a string, returns records containing the string or containing the string plus any additional characters at the position at which the asterisk appears, including a space: Car* finds Car, Carson, and Carbon.
?	Wildcard. Placed anywhere in the string, returns records containing the characters specified in the string, such that any single character may appear at the location of the ?: t?pe find type, tape.
=	Placed before a value, returns records containing a value equal to the query value: = CA in the state field returns records in CA.
<,>,<>	Any of these, placed before a value, returns records containing a value that is greater than, less than, or not equal to the query value.
<= , >=	Placed before a value, returns records containing a value that is greater than or equal to or less than and equal to the query value.
LIKE, like	Placed before a value, returns records containing the value: LIKE Smi* finds records in which the value in the query field starts with Smi.
NOT LIKE, not like	Use NOT LIKE to find records where the value in the query does not start with Smi.
IS NULL, is null,	Placed in the query field, returns records for which the query field is blank. Enter IS NULL in the Due Date field to find all records for which the Due Date field is blank.
IS NOT NULL, is not null	Use IS NOT NULL in the Due Date field to find those records in which the Due Date field is not blank.
~LIKE <space>	Place before a value to query for both upper and lower case words.

Save Queries

Queries can be saved for future use.

1. After performing a query, click the **Menu** button.

2. Click the **Save Query As** menu option.
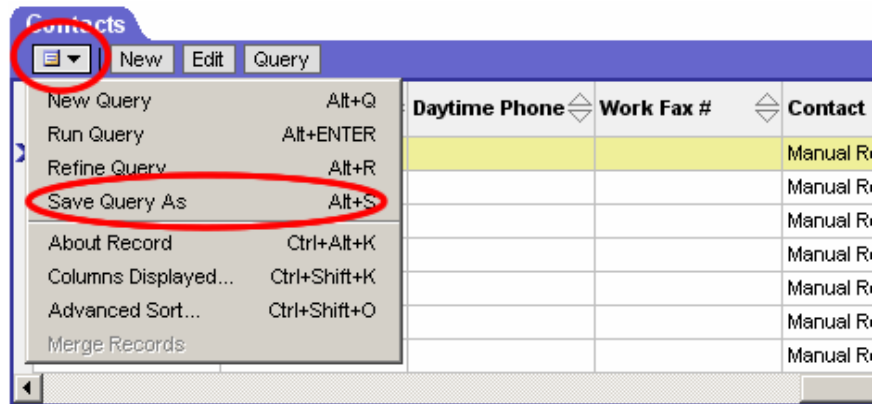
The Save Query As pop-up appears.
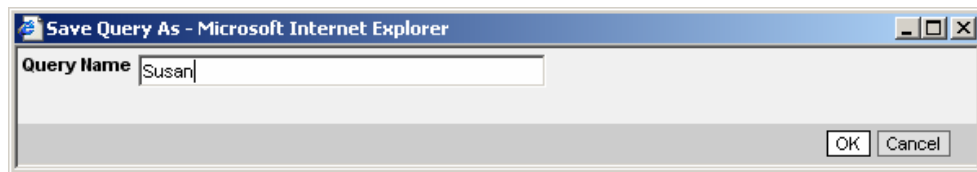
3. Type a name for the query in the "Query Name" field.

4. Click the **OK** button in the lower right hand corner of the pop-up.

   The saved query is available in the **Queries** drop down menu in the application toolbar.
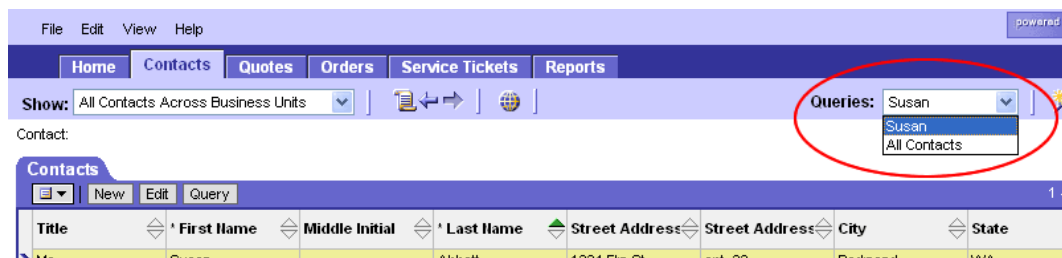
*A Saved query can be run by selecting it from the **Queries** drop down menu.*

*To view all the records of a Screen Tab, ensure the **Queries** drop down menu is set to the "all" option for the Screen Tab.*

Refine Queries

Saved queries can be refined using the following steps:

1. From the **Queries** drop down menu, select the query to refine.

2. Click the **Edit** Application Menu.

3. Highlight the **Query** menu option.

4. Select the **Refine** option.
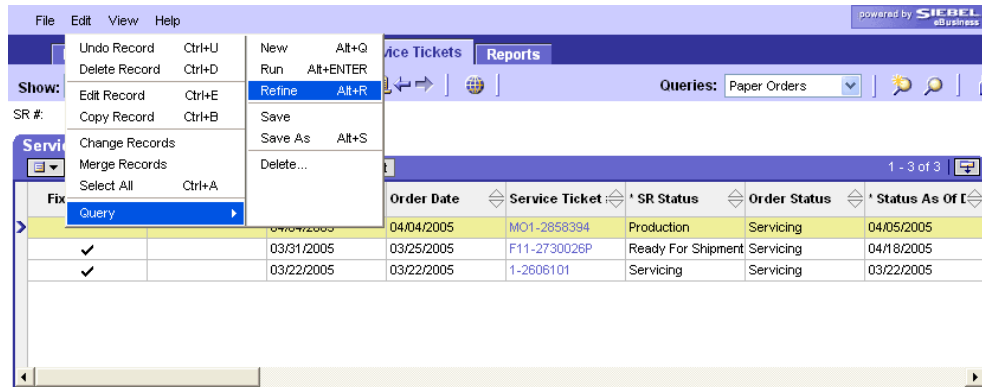
The query values appear in the list applet.
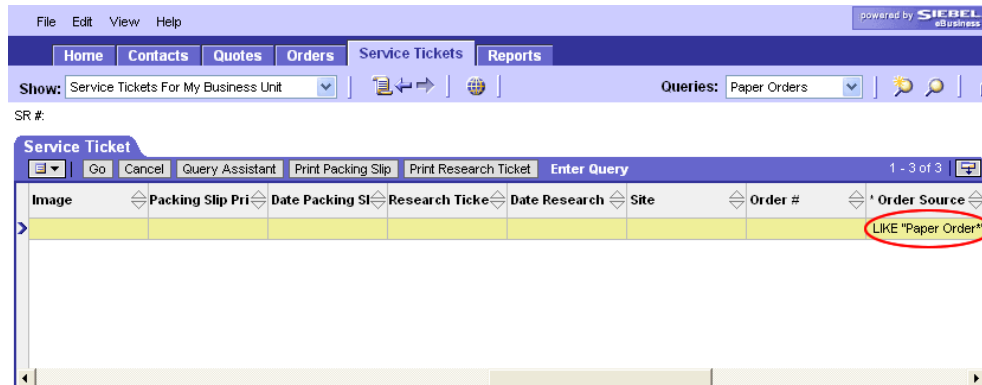
5. Edit the query by entering or removing terms from the appropriate column(s).
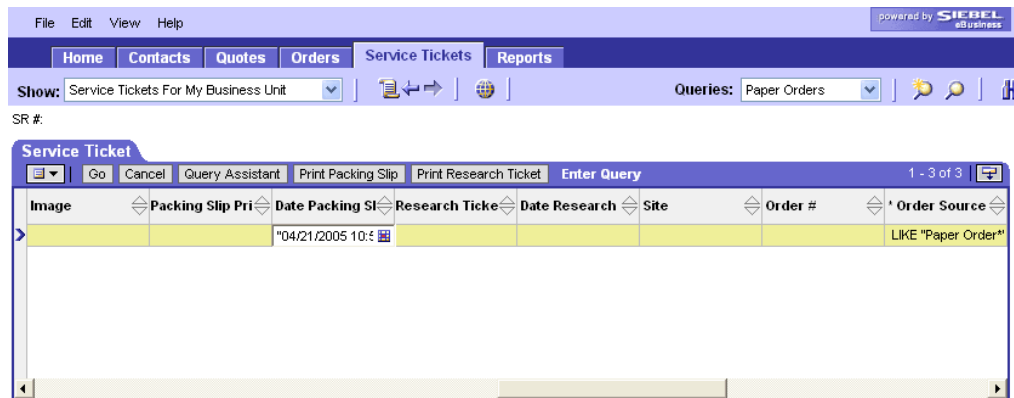
6. When completed, click the **Edit** Application Menu.

7. Highlight the **Query** menu option.

8. Select the **Save** menu option.
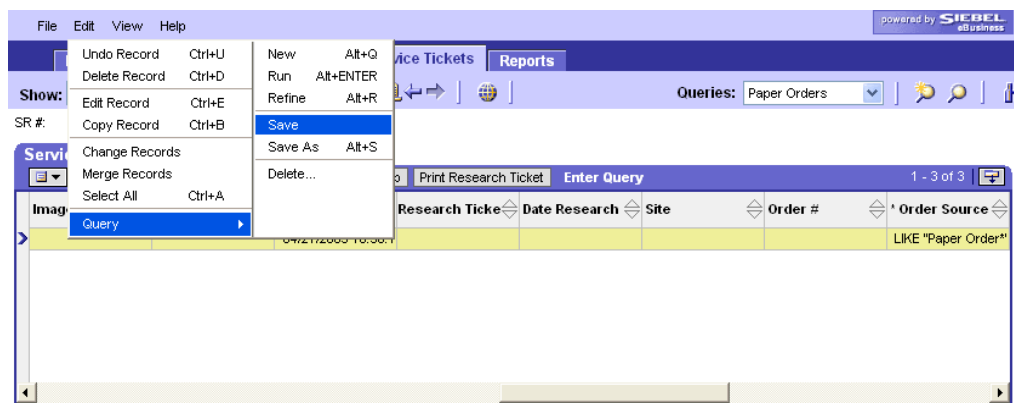
 S*elect the* **Save** *option, not the* **Save As...** *option (***Save As...*** will not save the refined query).*

Delete Queries

Saved queries can be deleted using the following steps:

1. Click the **Edit** Application Menu.

2. Highlight the **Query** menu option.

3. Select the **Delete...** menu option.
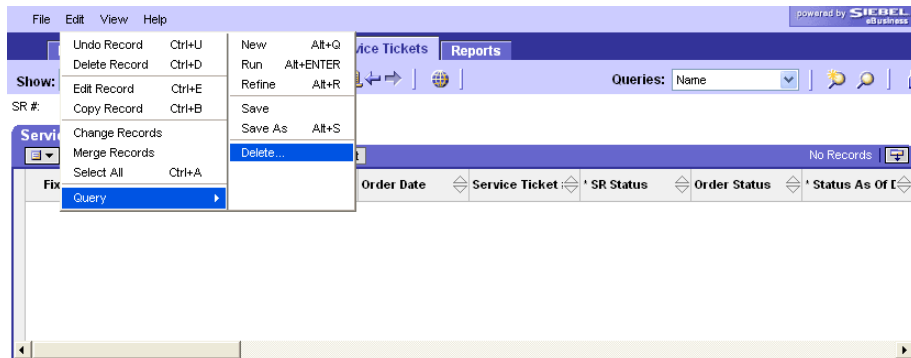
The Delete Record pop-up appears.
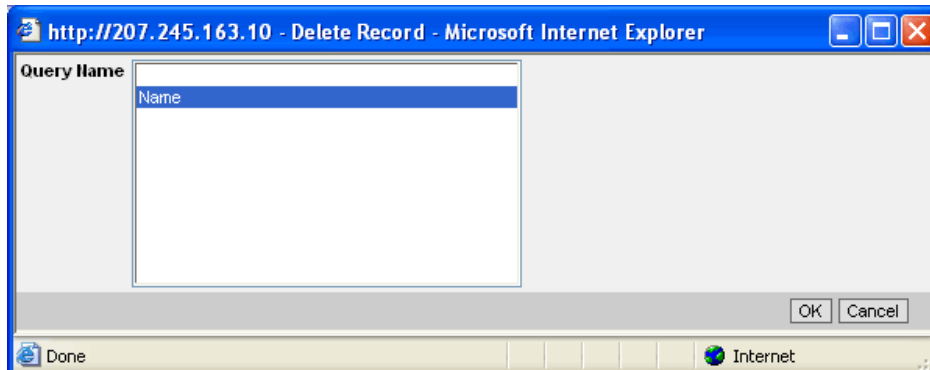
4. Click the name of the query to delete from the Query Name list.

5. Click the **OK** button.
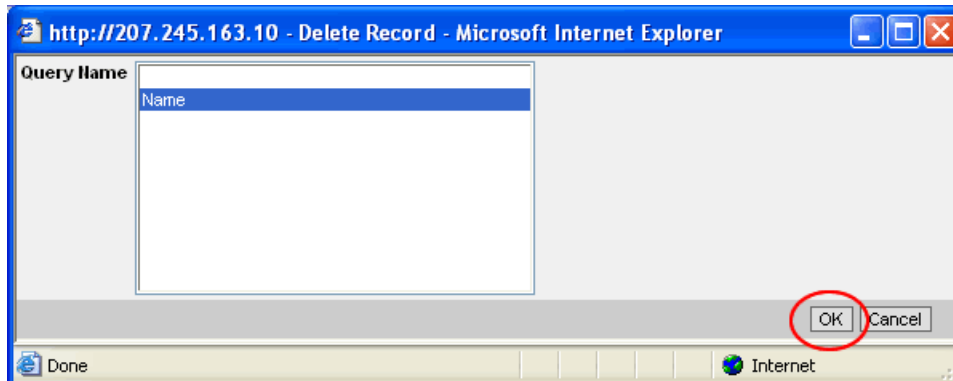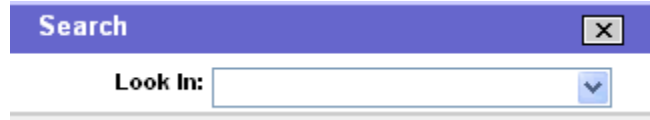
The selected query is removed from the **Queries** drop down menu.

Search

Users can search for records from any screen.
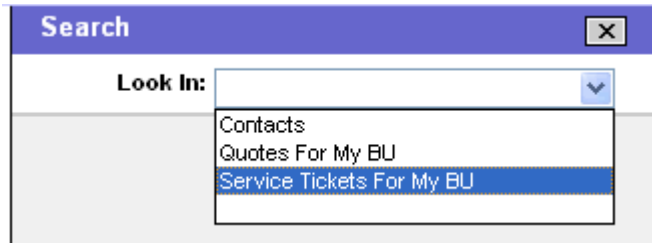
1. Click the **Search** button.

    The Search window will display on the right side of the screen.

2. From the **Look In** drop down, select the screen tab to search.
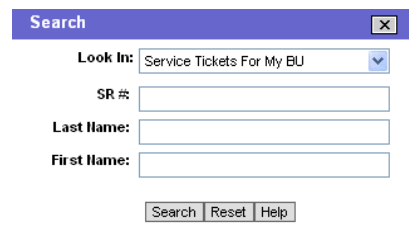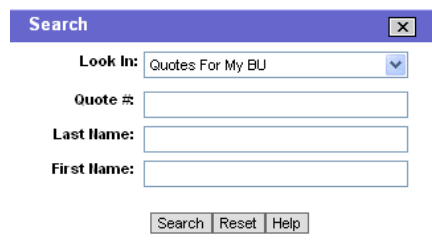
One of four search entry forms will be displayed based upon the screen tab selected from the **Look In** drop down. The four possible forms are displayed below.

3. Enter the search criteria in the appropriate fields, and click the **Search** button.

The search results will be displayed.

4. Click the hyperlink (blue text; Last Name in this example) for the desired record.

This will open the record within the corresponding screen tab on the left of the screen.

5. Click the **Close** ( ) button in the Search window's header to close the search window.

Keyboard Shortcuts

Record Management	Shortcut
New Record	CTRL + N
Edit Record	CTRL + E
Save Record	CTRL + S
Delete Record	CTRL + D
Copy Record	CTRL + B
Select All	CTRL + A
Undo Record	CTRL + U or ESC
New Query	ALT + Q
Execute Query	ENTER
Refine Query	ALT + R
Save Query As	ALT + S

Record Management	Shortcut
Go to Site Map	CTRL + SHIFT + A
Go to Next Record (in list)	CTRL + down arrow
Go to Next Record Set (in list)	ALT + down arrow
Go to Previous Record (in list)	CTRL + up arrow
Go to Previous Record Set (in list)	ALT + up arrow
Go to Last Record	ALT + L
Go to First Record	ALT + F
Open Search Center	CTRL + F
Print Reports	CTRL + SHIFT + R
Go to History Button	CTRL + SHIFT + H
Open List View/ Sub Tab Menu	CTRL + SHIFT + M

7 Service Tickets

This chapter describes the process for accessing, fulfilling, and updating Service Tickets, as well as printing research tickets and packing slips.

Access Service Tickets

Service tickets can be accessed by performing the following steps within the *Service Tickets* Screen Tab.

1. Run a **Query** on information relevant to the service ticket. (See *Perform a Query* section in Chapter 6.)

2. Select the service ticket from the *Service Ticket* List Applet.

3. Use the view tabs to examine information for the selected service ticket.

Changing the Site for a Service Ticket

The Site (NARA Business Unit) associated with a service ticket can be changed within SOFA. This feature is used to assign a Service Ticket to a new business unit.

> *Please note that once the user reassigns a Service Ticket to a new Site, then that Service Ticket is no longer available to the user. The Service Ticket has been transferred to the new business unit and will no longer appear in the user's list of Service Tickets.*

1. From the *Service Tickets* Screen Tab, select a service ticket that is in either **Servicing** or **Production**.

> *See Appendix for the Service Ticket Status definitions.*

2. Click on the **Change Site** button.

The Change Site pop-up appears.

3. Click the [image] button shown in the **Site** field.

The Pick Site pop-up appears.

4. Select one of the organizations listed and then click **OK**.

The Change Site pop-up appears.
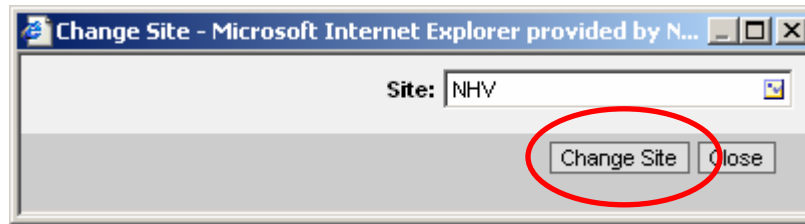
5. Click the **Change Site** button.

6. Click **OK** in the pop-up indicating that the site has been changed.
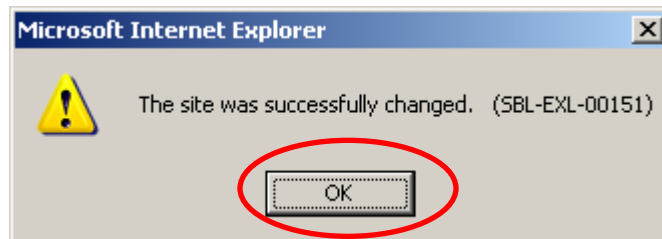
The pop-up closes and the new site is saved.
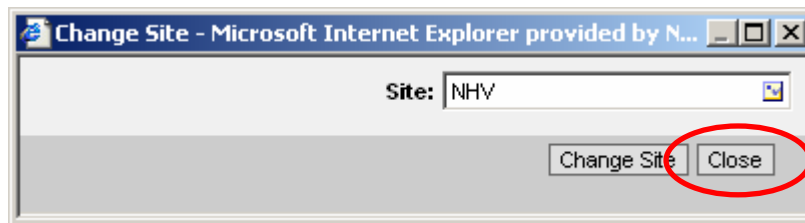
7. In the Change Site pop-up, click the **Close** button.
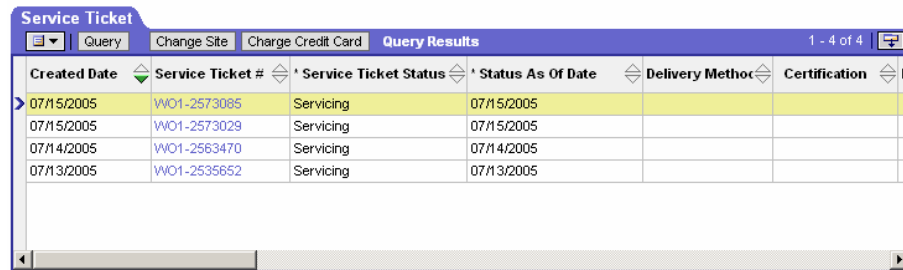
   The Change Site pop-up closes and the service ticket is reassigned to the new business unit.

Print Research Tickets and Update Service Ticket Status

Follow these steps to print a research ticket(s).

1. From the *Service Tickets* Screen Tab, query for the service ticket(s) for which research ticket(s) should be printed. The query should be limited to service tickets in **Servicing** status. (See Perform a Query section in Chapter 6.)

   > *SOFA will print research tickets for <u>all</u> service tickets displayed in the query results. If needed, refine the query to exclude service tickets for which research tickets should not be printed.*

2. Click the **View** Application Menu, and then click the **Reports** menu option.

The Reports pop-up will open.

3. From the **Select a Report** drop down, select **Research Ticket**.

4. Click the **Run Now** button.

   The report(s) is displayed on the user's screen in Portable Document Format (pdf) in Adobe Reader.

   *The user may save the report to a user specified location by clicking the **Save a Copy** button in Adobe Reader.*

   *The user may print the report by clicking the **Print** button in Adobe Reader.*

   *The user should not use the **Email** button in Adobe Reader, as this feature is not functional.*

5. Update the Service Ticket Status from **Servicing** to **Production** for all service tickets for which a research ticket has been printed.
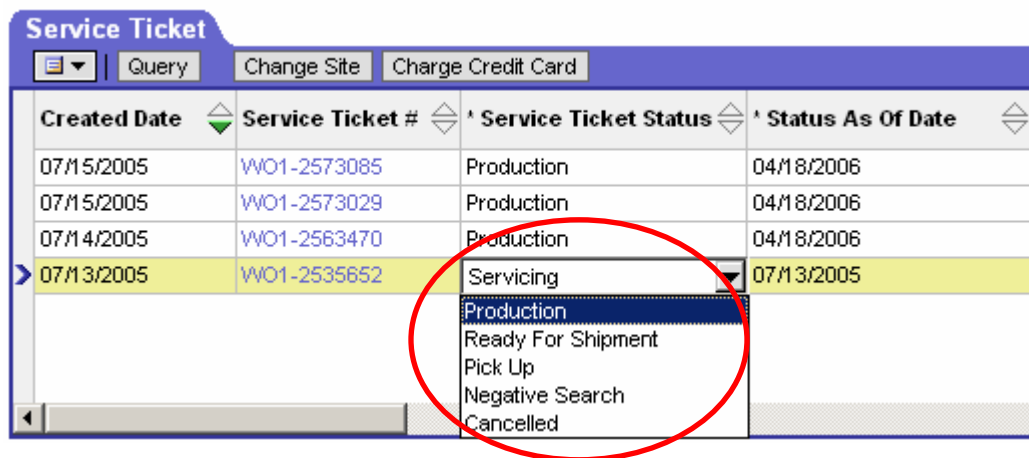
The user can indicate to whom the Service Ticket is assigned by entering the name of the individual in the Description field.

Fulfill Service Tickets and Update the Service Ticket Status

The *Service Tickets* Screen Tab allows the user to fulfill service tickets and update the status of a Service Ticket.

1. From the *Service Tickets* Screen Tab, query for the service ticket(s) to be updated. The Service ticket(s) to be updated should be in **Production** status. (See Perform a Query section in Chapter 6.)

Do not click in the "Service Ticket #" column while selecting this order; the service ticket number is a hyperlink that will take the user to the Order Details View Tab.

2. Enter the page count in the Form Applet at the bottom of the screen.

If the page count entered exceeds the maximum page count for this type of transaction, the overage process will apply. See the Overage Process section for further instruction.

If an attachment will be added, see the Adding Attachment section for further instruction.

3. Update the status from **Production** to **Ready for Shipment**.

See Appendix for the Service Ticket Status definitions.

Charge Credit Card

The following steps describe how to charge the customer's credit card.

1. From the *Service Tickets* Screen Tab, select a service ticket for which the credit card should be charged. The selected service ticket must be in **Ready for Shipment** status, and the Payment Status must be **Pending** or **Declined**.

2. Click the **Charge Credit Card** button
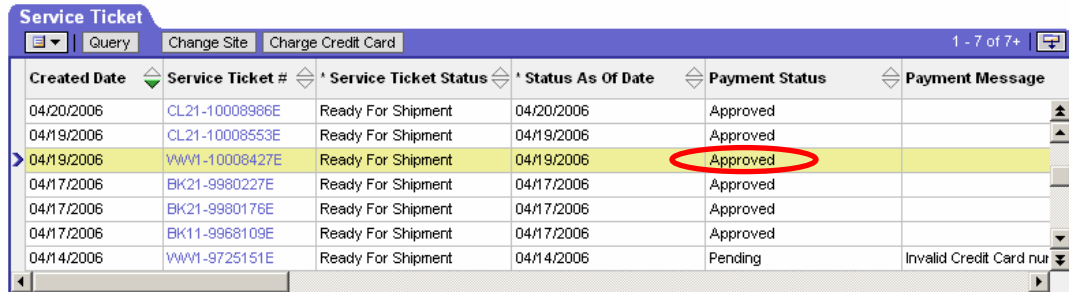
A pop-up appears indicating whether the payment is Approved or Declined. If the pop-up displays Approved, the customer's credit card has been charged.
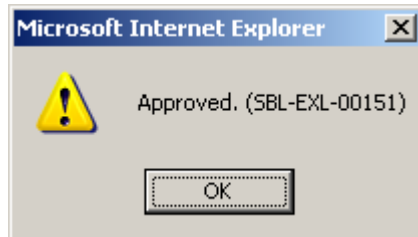
*If the pop-up displays **Declined**, the system is unable to process payment. In this event, the customer should be contacted to obtain/verify their credit card information. This new/updated credit card information should then be added to the customer's service ticket in SOFA. For more information, see Add New Credit Card Information to a Service Ticket section in Chapter 7.*

3. Click **OK** on the payment status notification pop-up.

The Payment Status field refreshes with a new status of **Approved** or **Declined**.
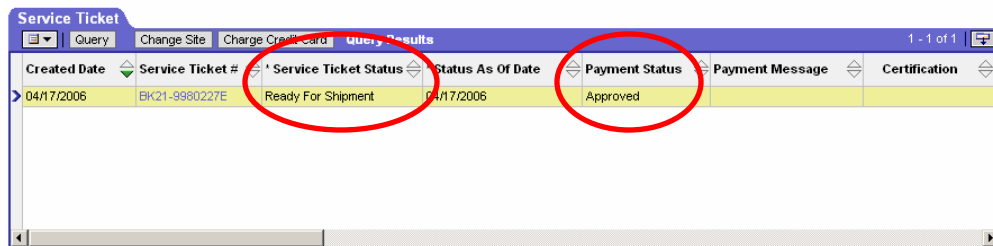
 When the credit card is declined, SOFA will send an auto-generated email to the customer informing them that their credit card has been declined.

Print Packing Slip and Update Service Ticket Status

Follow these steps to print a packing slip(s).

1. From the *Service Tickets* Screen Tab, query for the service ticket(s) for which the packing slip(s) should be printed. The query should be limited to service tickets in **Ready for Shipment** status, and those with a payment status of **Approved**. (See Perform a Query section in Chapter 6.)

SOFA will print packing slips for all service tickets displayed in the query results. If needed, refine your query to exclude service tickets for which packing slips should not be printed.

Responsibility B2

2. Click the **View** Application Menu, and then click the **Reports** menu option.
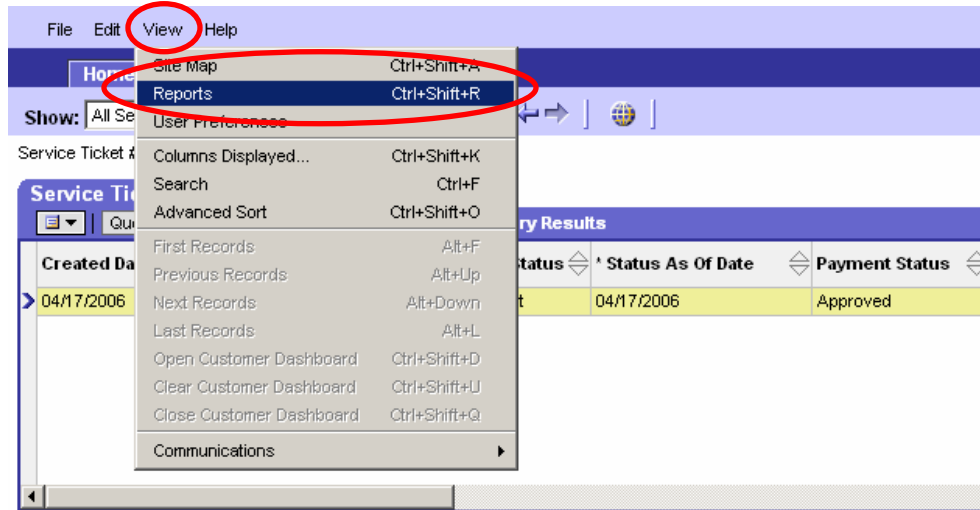
The Reports pop-up will open.
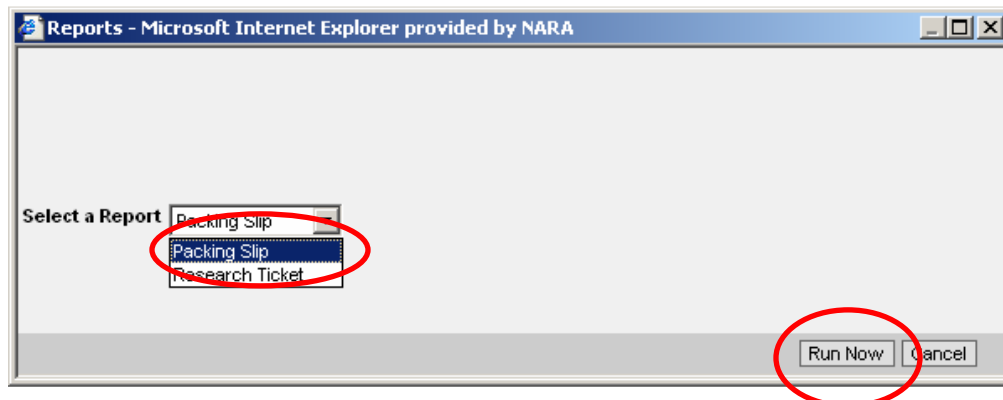
3. From the **Select a Report** drop down, select **Packing Slip**.

4. Click the **Run Now** button.

The report(s) is displayed on the user's screen in Portable Document Format (pdf) in Adobe Reader.

*The user may save the report to a user specified location by clicking the **Save a Copy** button in Adobe Reader.*

*The user may print the report by clicking the **Print** button in Adobe Reader.*

*The user should not use the **Email** button in Adobe Reader, as this feature is not functional.*

5. Update the Service Ticket Status from **Ready for Shipment** to **Shipped** for all service tickets for which a packing slip has been printed.

   *The user should only update the status to **Shipped** if the product will be shipped to the customer soon after the packing slip is printed. If the shipping of the package is delayed, the Service Ticket should remain in **Ready for Shipment** status until the point in time that the item is shipped.*
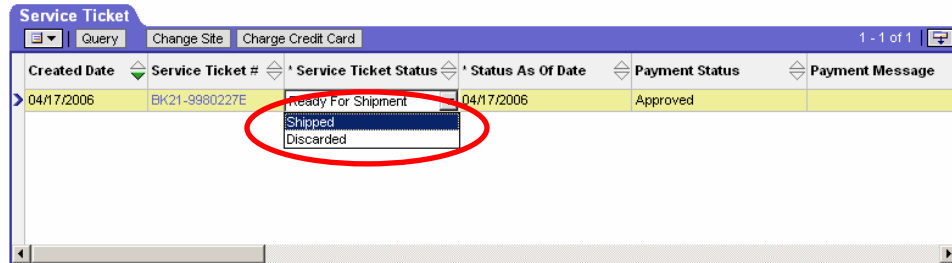
   *When the status is updated to **Shipped**, SOFA will send an auto-generated email to the customer informing them that their order has been shipped.*

Add Attachment to a Service Ticket
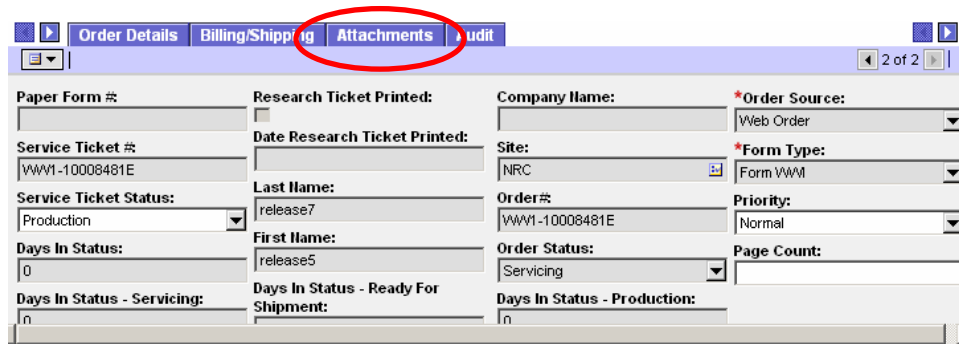
The following section details how to attach a file to a service ticket.

   Files can only be attached to orders for certain form types. For all other form types, SOFA will not allow the user to attach a file.

1. From the *Service Tickets* Screen Tab, select the service ticket to be updated.
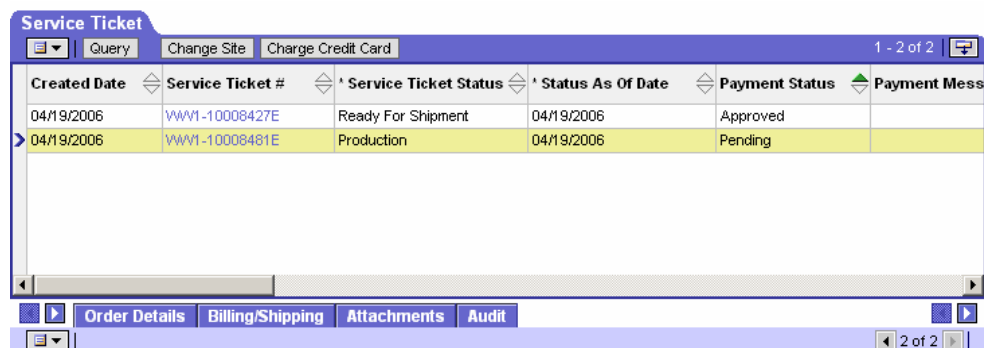
2. Click on the *Attachments* View Tab.
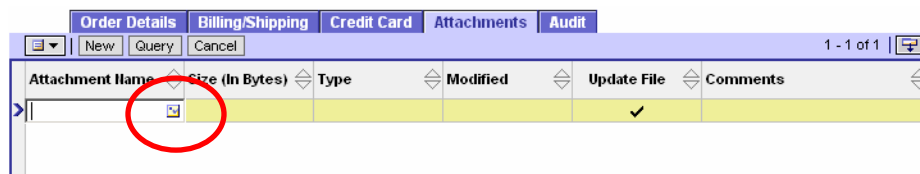
3. Click on the New button to add a new file.
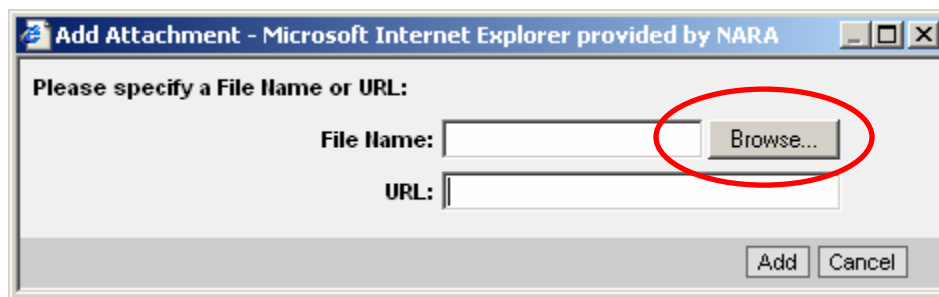
A new attachment record displays.

4. Click the button shown in the Attachment Name field.

The Add Attachment pop-up displays.
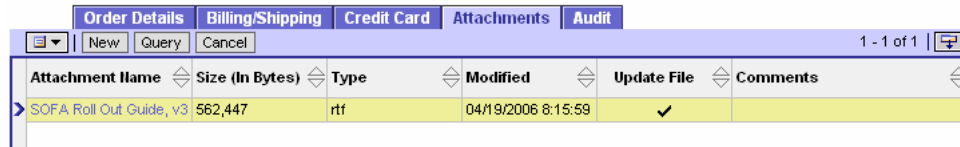
5. Click the Browse button and search for the appropriate file. Select the file and click the Open button.

The new file appears in the Attachment Name field.

Order Details	Billing/Shipping	Credit Card	Attachments	Audit			

Attachment Name	Size (In Bytes)	Type	Modified	Update File	Comments
SOFA Roll Out Guide, v3	562,447	rtf	04/19/2006 8:15:59	✔	
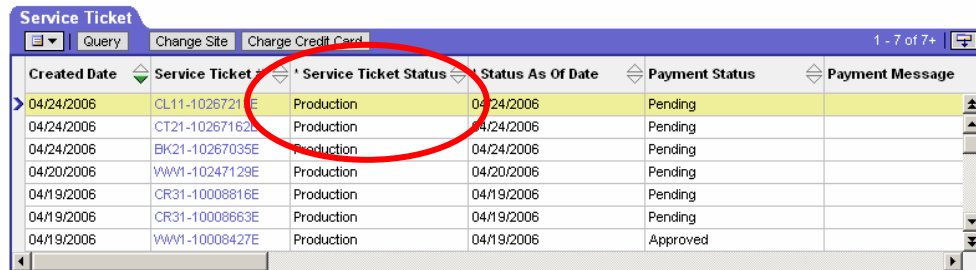
To access a file attached in SOFA, click in the Attachment Name field, which is a hyperlink to the file.

Attachments are posted to Order Online! for customer download once the service ticket status is updated to **Shipped**.

Overage Process
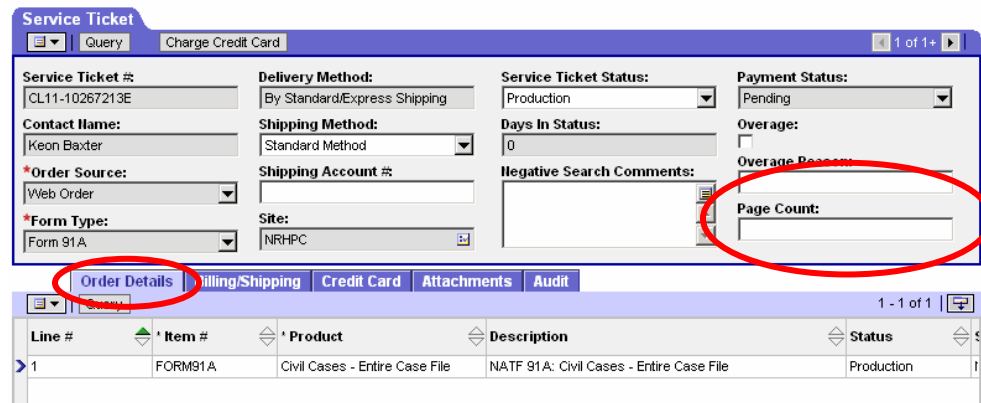
The overage process applies when the number of pages entered into the Page Count field exceeds the maximum number of pages allowed for the form type.

1. From the *Service Tickets* Screen Tab, select a service ticket in **Production** status.
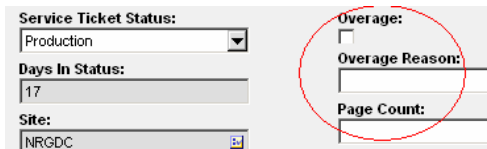
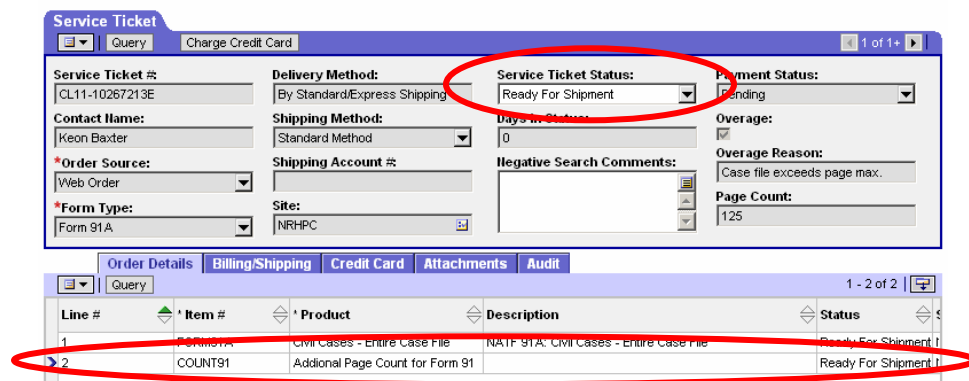2. Click on the Order Details tab and enter the number of pages into the Page Count field.

If the page count entered exceeds the maximum page count for the selected product, the overage procedure should be followed. The table below provides additional detail.

Transaction	Page Count	Order Amount	Procedure to follow
• All Form 90s Docket Sheets and Pre-Selected Documents • Form WWI • Form NATZ	More than 20 pages*	Over $10.00	1. Obtain approval from the customer to charge them for the overage amount. 2. In the *Service Ticket* Form Applet, select the **Overage** checkbox. The overage checkbox must be checked before entering an overage reason.
• All Form 90s Entire Case Files	More than 70 pages*	Over $35.00	3. Provide a reason for the overage, as well as the time and date of customer approval for the overage, in the Overage Reason field.

* Pages exceeding the package maximum require a $0.50 charge per page.

a. After completing the overage procedure described above, update the status to **Ready for Shipment**.

The status changes to **Ready for Shipment** and SOFA generates a new line item to account for the overage amount.

Add New Credit Card Information to a Service Ticket

A new credit card can be added to a service ticket up to the point at which payment is approved (if the payment is approved, the Payment Status field will display **Approved**). New credit cards are typically added after a customer's credit card has been declined. Follow the steps below to add a new credit card.

1. From the *Service Tickets* Screen Tab, query for the service ticket that requires new add credit card information. (See Perform a Query section in Chapter 6.)

    Note that new credit card information cannot be added to a service ticket if payment has been approved (if the payment is approved, the Payment Status field will display Approved).

2. Select the service ticket.

3. Click the *Credit Cards* View Tab.

4. Click the **New** button

A new credit card record is created.

5. Click in the Card Holder Name field, then click the ( ) button.

The Select Credit Card pop-up appears.

6. Click the **NEW** button.

A new credit card record appears.

7. Click each field in the new credit card record and type/select the appropriate information. The following fields are required.

☐ Credit Card #

☐ Cardholder Name

☐ Credit Card Type

☐ Expiration Month

☐ Expiration Year

☐ Billing Phone #

☐ Billing Street Address 1

☐ Billing City

☐ Billing State

☐ Billing Zip Code

☐ Billing Country

> *Billing Information is the contact information on file with the credit card company and may be different than the Shipping Information.*

8. Once all required fields are completed, click the Save button to save the credit card information.

The Select Credit Card pop-up refreshes and the new billing information saves.

9. Click the Pick button to select the new credit card.
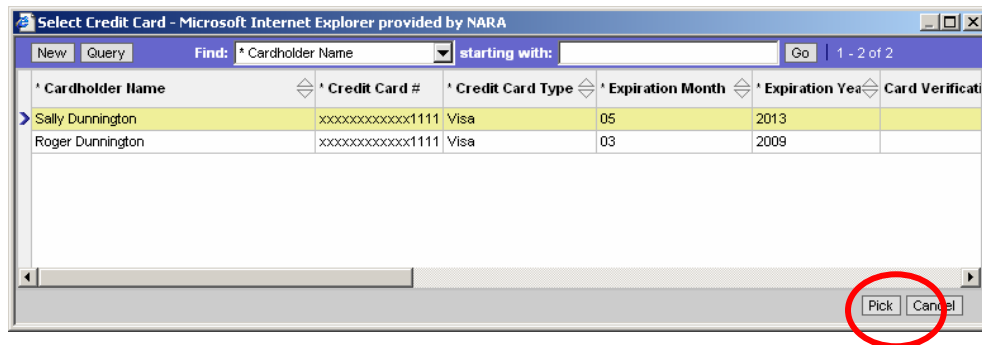
The Select Credit Card pop-up closes and the new credit card information is now associated with the service ticket.
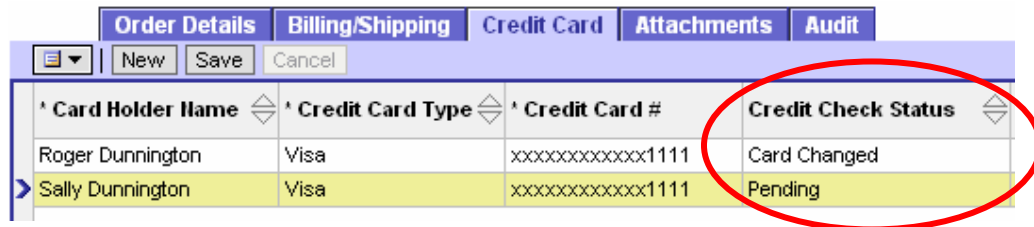
The new credit card will display a status of **Pending** in the Credit Card Status column, and the previous credit card will display **Card Changed** in the Credit Card Status column.

Add a New Address to a Service Ticket

One or more addresses can be added to a service ticket. These addresses can then be selected for the service ticket's Billing Address or Shipping Address. The steps below describe how to change the Shipping Address for a service ticket (the steps to change a Billing address are the same).

1. From the *Service Tickets* Screen Tab, query for and select the service ticket. (See Perform a Query section in Chapter 6.)

2. Click the *Billing/Shipping* View Tab.

3. Click the ( ) button in the Street Address 1 field.
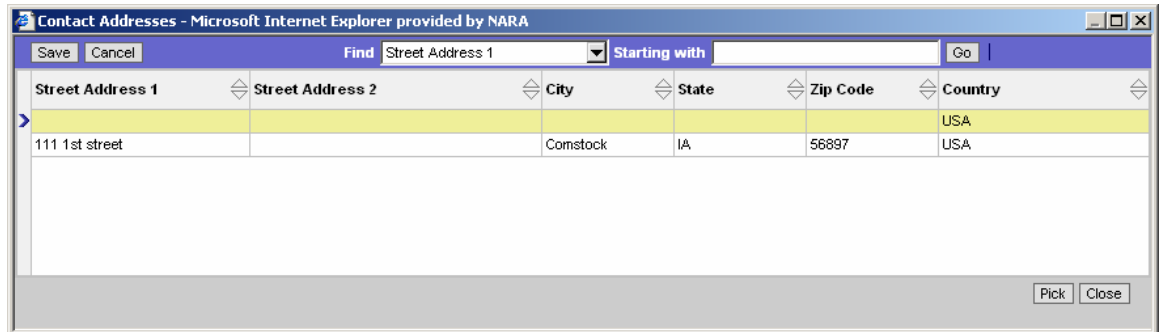
The Contact Addresses pop-up appears.

4. Click the New button.

A new address record appears.

5. Click each field and type/select the appropriate information. A description of each field is below.

   ☐ Street Address 1 – required

   ☐ Street Address 2

   ☐ City – required

   ☐ State – required

   Abbreviations for US States and Canadian Provinces may be

> *selected from the drop down.*
>
> *If the address is for a country other than US or Canada, then either type the name of the State or select **None** from the drop down.*

☐ Zip Code – required

☐ Country – required

6. Once all address information is entered, click the Save button.

The Contact Addresses pop-up refreshes and the new address saves.

7. Click the Pick button to select the new address.

The Select Addresses pop-up closes and the new address is now associated with the service ticket.

Negative Search

The Negative Search *Ticket* status is used to indicate that NARA is unable to fulfill a request. The optional "Negative Search Comments" field can be used to provide the customer with further explanation as to why their request cannot be fulfilled.

1. From the *Service Tickets* Screen Tab, query for and select a service ticket in **Production** status. (See Perform a Query section in Chapter 6.)

2. Click the *Order Details* view tab.

3. Optional – In the "Negative Search Comments:" field, enter any comments to be included as part of an email that will be sent to the customer.

    Text entered into the "Negative Search Comments:" field will be emailed to the customer as part of an email explaining why the order cannot be fulfilled. Only enter comments appropriate for correspondence with the customer.

4. Update the Service Ticket status to **Negative Search**.

5. The Service ticket is complete and an email is sent to the customer notifying them that NARA is unable to fulfill their request. *Any text entered into the "Negative Search Comments:" field is included in the email to the customer.*

Audit View Tab

The *Audit* View tab provides SOFA users with a history of the service ticket, including when statuses where changed and by whom.

1. From the *Service Tickets* Screen Tab, run a query for the service ticket. (See Perform a Query section in Chapter 6.)
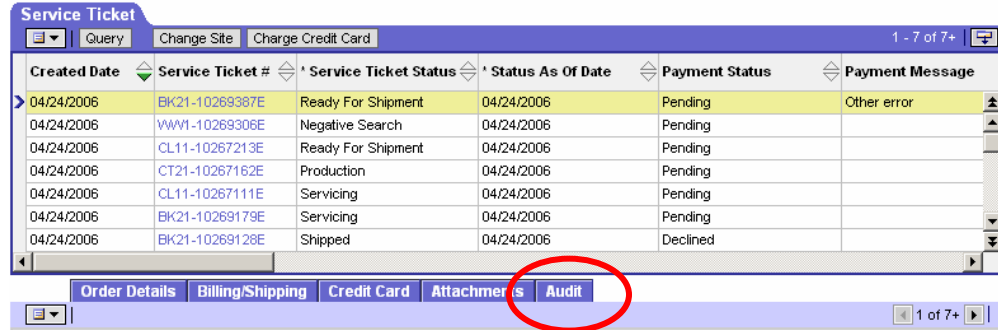
2. Select the service ticket record.
3. Click the *Audit* View Tab.

The *Audit* View Tab for the selected service ticket record is displayed.

The view displays the following columns:

☐ Field – denotes the field in the application for which audit history is being tracked. In the screen shot below, it is the "Status" field.

☐ Old Value – displays the old value for the field being tracked.

☐ New Value – displays the new value for the field being tracked.

☐ Date – displays the date the change was made.

☐ Changed By – displays the SOFA User ID of the user who made the change.

☐ Operation – denotes the kind of change made by the user e.g., "Modify" which means a record status has been modified.

8 Appendix

Service Ticket Statuses

Status Name	Definition	Next Possible Status(es)
Servicing	The order has been assigned to a business unit for fulfillment (via service ticket(s)). This is the default status for Service Tickets.	Production
		Ready for Shipment
		Negative Search
		Cancelled
Production	The business unit is fulfilling the service ticket(s) (i.e. making copies, gathering merchandise, etc.).	Ready for Shipment
		Shipped
Ready for Shipment	The completed service ticket has been sent to the mailroom.	Shipped
		Discarded
Shipped	The Service Ticket has been fulfilled and mailed to the customer or posted to Order Online! for customer download. When this status is selected, SOFA will send the customer an auto-generated email to inform them that their order has been shipped.	-
Negative Search	The ordered items could not be found or are not in NARA's possession. When this status is selected, SOFA will send the customer an auto-generated email to inform them that the request cannot be fulfilled.	-
Cancelled	The service ticket has been cancelled for one of the following reasons: a) NARA research error, b) reproduction error, or c) copies never arrived/shipping problem. When this status is selected, SOFA will send the customer an auto-generated email to inform them that the request has been cancelled.	-
Discarded	The documents copied for an order were never paid and therefore the copies were discarded.	-