

MAST Training: Job Aid

Create a Mail Tracking Request



Objective

To provide employees with steps on how to create a mail tracking request.



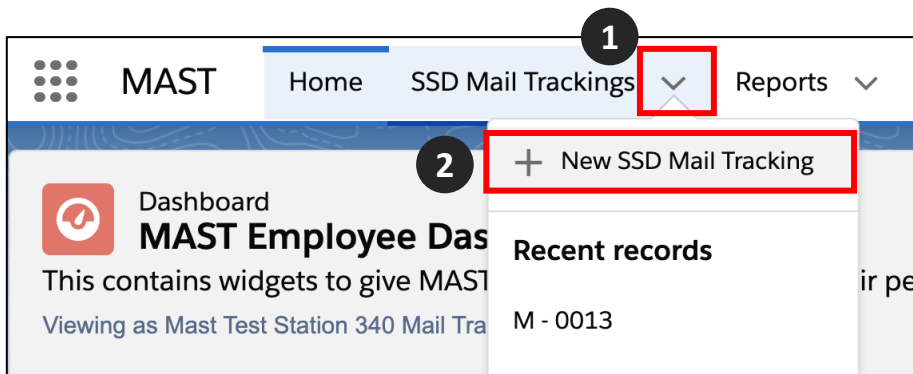
Audience

Mail Tracking Employee

Instructions

Pre-Step: Access the MAST Homepage via <https://va.my.salesforce.com/>

1. Select the drop-down arrow in the **SSD Mail Trackings** tab from the MAST dashboard
2. Click **New SSD Mail Tracking** from the drop-down menu.



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3. Select the facility in the **Facility field** under the **General Request Information** section in the **New SSD Mail Tracking** pop-up window.
4. Fill in the **Station** and **Date field** under the **General Request Information** section in the **New SSD Mail Tracking** pop-up window.

Note: Fields marked with * are required to proceed.

5. Fill in any optional fields under the **General Request Information** section in the **New SSD Mail Tracking** pop-up window.

Note: These fields are not required but may be applicable to the new mail tracking request.

Note: Use the **Draft** status to add information throughout the day, then update status to **Submitted** when ready to submit your record for review.

The screenshot shows the 'New SSD Mail Tracking' form. A red box highlights the 'General Request Information' section, which includes fields for 'SSD Mail #', '* Facility' (with a search dropdown), '* Station' (with a dropdown), and '* Date' (with a calendar icon). Callout 3 points to the 'Facility' field. Callout 4 points to the 'Station' field. Callout 5 points to the rest of the form, which contains various input fields for mail tracking details such as 'Incoming USPS Mail - Number', 'Outgoing USPS Mail - Number', 'Incoming Bulk Mail - Weight', 'Outgoing USPS Mail - Amount', 'Express Mail Received - Number', 'Express Mail Shipped - Number', 'Express Mail Shipped - Amount', 'Incoming Courier - Number', 'Outgoing Courier - Number', 'Outgoing Courier - Amount', 'Incoming Claims Files - Number', 'Return Mail - Weight', 'Check Receipt - Number', 'Stamps Issued - Number', 'Stamps Used - Number', 'Stamps Issued - Amount', 'Stamps Used - Amount', 'Burial Flag Request - Number', 'Other', 'Status' (with a dropdown set to 'Draft'), 'Comments', and 'Completed Date'.



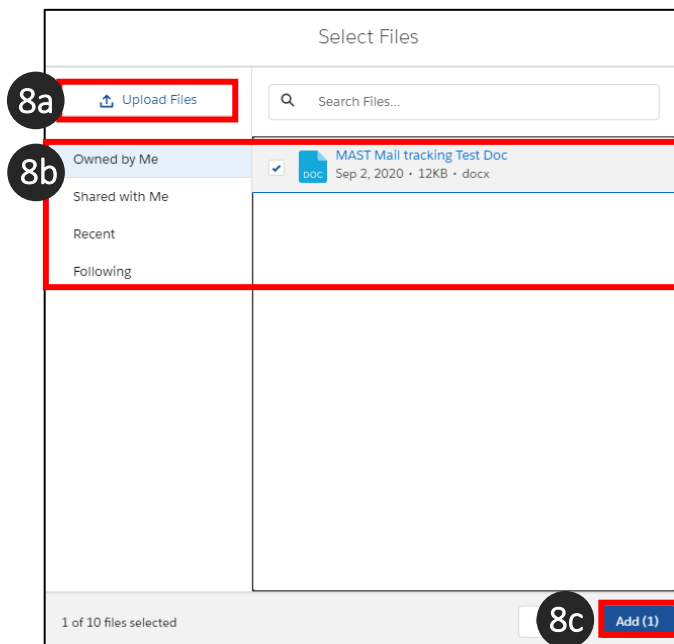
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6. Click **Save** on the bottom right-hand side of the **General Request Information** pop up window.
 - a. To start another request, **Click** the **Save & New** button at the bottom of the pop-up window to save and immediately create another Mail Tracking request.



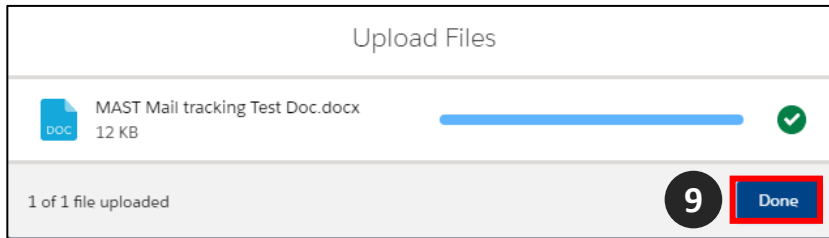
7. Optional: **Click** on the **Related** tab at the top of the **SSD Mail Tracking** section.
8. Optional: **Select** the **Add Files** icon to upload files already located in Salesforce.
 - a. **Select** the **Upload Files** icon located in the top right-hand corner of the pop-up window to add files from your desktop.
 - b. **Select** a file from the **Owned by Me**, **Shared with Me**, **Recent**, or **Following** folders to add files already located in MAST. You may select more than one file to add at a time by selecting the checkbox next to the files.
 - c. Once the files have been selected, **click** the **Add** button at the bottom of the pop-up window.



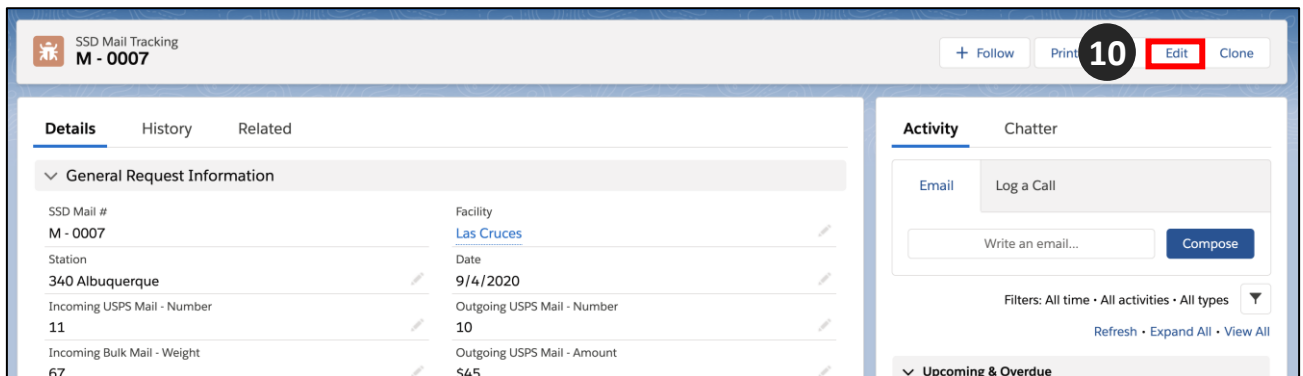
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9. Click **Done** once the file has been uploaded.



10. **Review** all the entered information. To make changes to the mail tracking request before exiting, click the **Edit** icon in the top right corner of the **SSD Mail Tracking** bar at the top of the window.



✓ You have completed creating a mail tracking request in MAST!