

# MAST Training: Job Aid

## Manage Facility Points of Contact



### Objective

To provide facility managers with steps on how to manage facility points of contact.



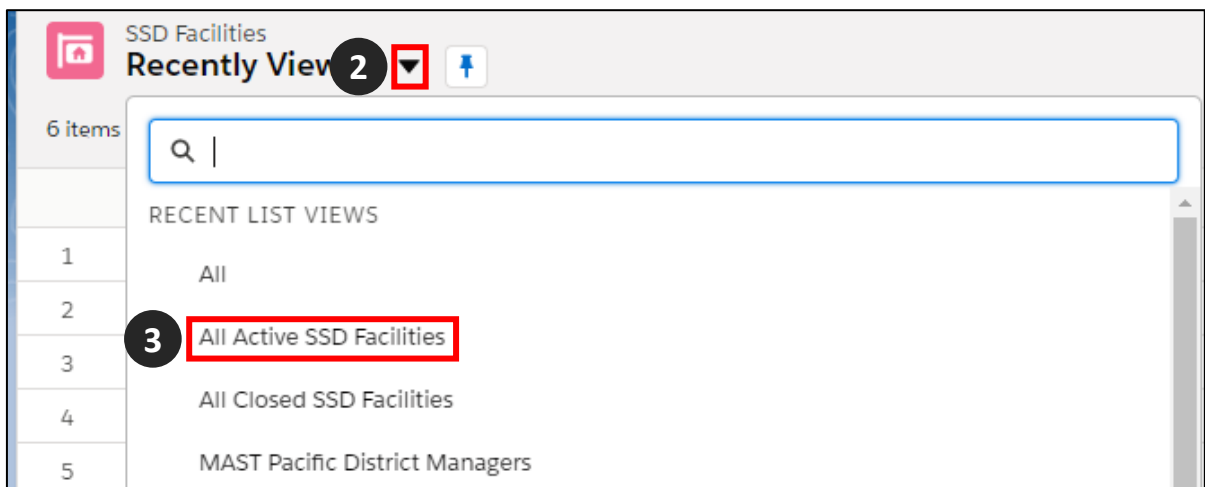
### Audience

User: Facility Managers

### Instructions

**Pre-Step:** Log into **MAST** via <https://va.my.salesforce.com/>.

1. Click on **SSD Facilities Tab**.
2. Click the **dropdown** arrow to bring up the available list views.
3. Select **All Active SSD Facilities** to display all active facilities available to you.



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## View and Manage Facility Requests

4. Select the **Facility** that requires points of contact to be added or managed.

<input type="checkbox"/>	SSD Facility Name ↑	Facility Name (Satellite/Out...	Lease Number/OA	Facility Type
1	<input type="checkbox"/> Las Cruces		LNM16965	GSA Lease
2	<input type="checkbox"/> Test			VA-Owned
3	<input type="checkbox"/> Test 321			VA-Owned
4	<input type="checkbox"/> Test Station			VA-Owned
5	<input type="checkbox"/> <b>Test Station 3</b>			VA-Owned
6	<input type="checkbox"/> Testing		34343	GSA Lease

5. Click the **Related Contacts for Parent Account** tab.

SSD Facility  
Test Station 3

+ Follow Printable View Edit Change Owner

Details History Related

Station Information

Station Name	Albuquerque	SSD Facility Name	Test Station 3
Station Number	340		
Building Name		Status	

Related Contacts for Parent Account (1)

Adam Smith  
Account Name: Test Station 3  
Title:  
Email: test@email.com

View All

6. Click on **Add Relationship**.

Accounts > Test Station 3  
Related Contacts

1 Item • Sorted by Last Name • Updated a few seconds ago

Contact Name	Account Name	Title	Email	Phone	Roles
1 Adam Smith	Test Station 3		test@email.com		Business User

Add Relationship

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7. Click into the **Contact** field.

**Note:** Ensure the facility selected appears in the **Account** field.

**Note:** The user will not select a role at this time.

New Account Contact Relationship

Account Contact Relationship Information

\* Account  
Test Station 3

Roles

Available

- Business User
- Decision Maker
- Economic Buyer
- Economic Decisi...

Chosen

\* Contact  
Search Contacts...

Cancel Save & New Save

8. (Optional) **Select New Contact**, or select existing contact if you are editing a prior contact.

\* Contact

Search Contacts...

- Test Test
- a v Test
- Barry Barnes Test
- Bill Billson Test
- Nate Nathan Test

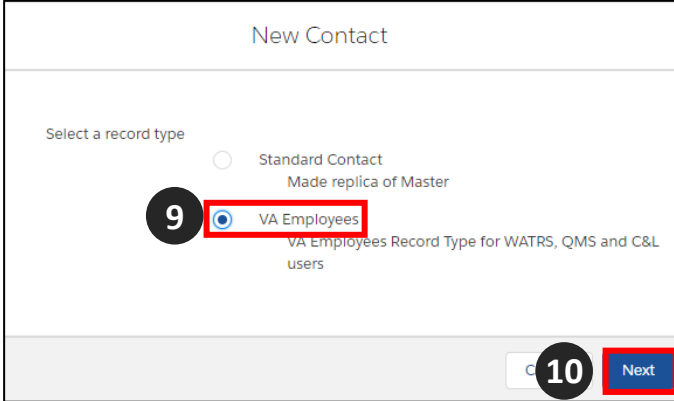
+ New Contact

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9. Select **VA Employees** on the pop-up window.

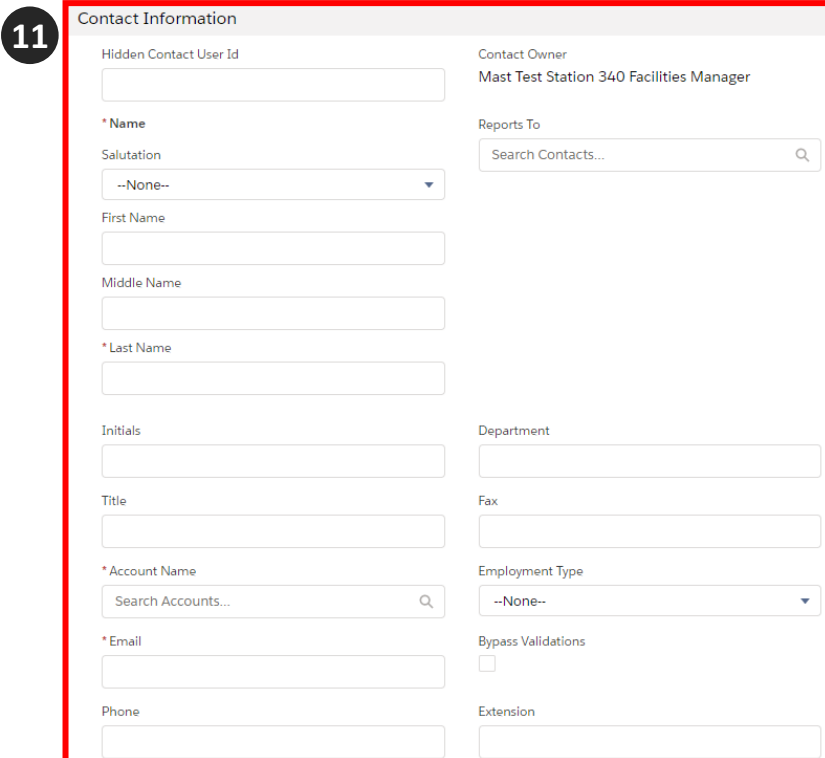
10. Click **Next** to continue.



The screenshot shows a 'New Contact' form. Under the heading 'Select a record type', there are two radio button options. The first is 'Standard Contact' with the subtext 'Made replica of Master'. The second is 'VA Employees' with the subtext 'VA Employees Record Type for WATRS, QMS and C&L users'. The 'VA Employees' option is selected and highlighted with a red box and a circled '9'. At the bottom right of the form, there is a 'Next' button, also highlighted with a red box and a circled '10'.

11. Complete the **required fields** in the Contact Information form. (all required fields are marked with a red \*)

**Note:** Ensure the proper facility is entered in the **Account Name** field.



The screenshot shows the 'Contact Information' form, which is enclosed in a red border. A circled '11' is in the top left corner. The form contains several fields: 'Hidden Contact User Id' (text input), 'Contact Owner' (text input, value: 'Mast Test Station 340 Facilities Manager'), '\* Name' (text input), 'Reports To' (dropdown menu with search), 'Salutation' (dropdown menu, value: '--None--'), 'First Name' (text input), 'Middle Name' (text input), '\* Last Name' (text input), 'Initials' (text input), 'Department' (text input), 'Title' (text input), 'Fax' (text input), '\* Account Name' (text input with search), 'Employment Type' (dropdown menu, value: '--None--'), '\* Email' (text input), 'Bypass Validations' (checkbox), 'Phone' (text input), and 'Extension' (text input).

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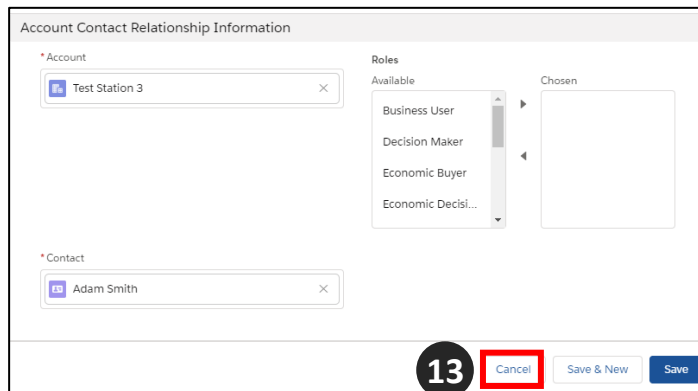
12. Click **Save** at the bottom of the form to ensure all changes are saved.

**Note:** Do not enter any information in any of the fields listed under C&L/SAA Contract Information or SCO Contact Information. These fields are for the Compliance and Liaison Business Unit's use only.



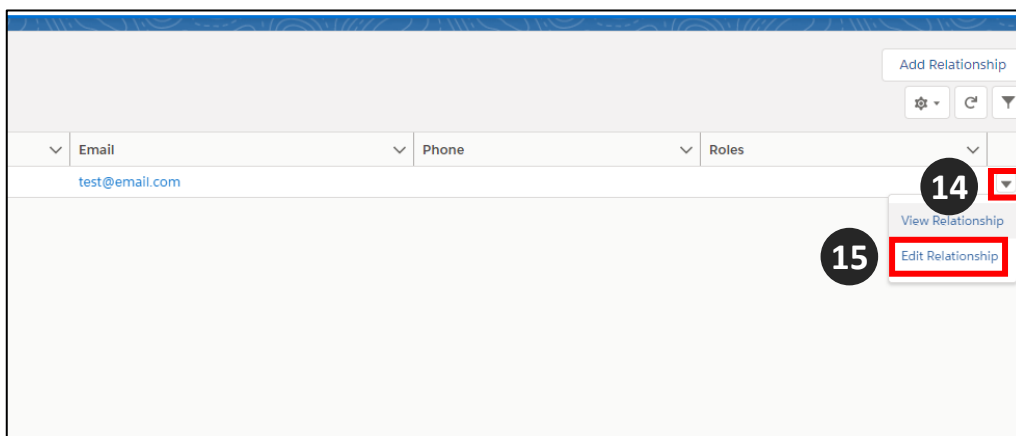
13. Click on **Cancel** in the pop-up after verification that the newly entered user appears in the **contact** field.

**Note:** The user will not select a role at this time.



14. Click the **drop-down arrow** to the far right of the newly added contact.

15. Select **Edit Relationship**.



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16. Click the **drop-down arrow** to the far right of the newly added contact.
17. Select **Edit Relationship**.

Roles

Available

16 Business User

Decision Maker

Economic Buyer

Economic Deci...

Chosen

17

18. Verify the selected role appears in the **Chosen** field.
19. Click **Save** to assign the selected role to the selected point of contact.
20. Verify the select role appears to the right of the select point of contact after saving.

Roles

Available

18

Decision Maker

Economic Buyer

Economic Deci...

Evaluator

Chosen

Business User

Last Modified By  
Mast Test Station 340 Facilities Manager,  
9/10/2020 5:26 PM

Cancel Save & 19 Save

Email Phone Roles

test@email.com

20 Business User

**Post-Step:** There is 1 potential post step.

- (1) User can edit any currently populated points of contact to update any pertinent information.

✓ You have completed viewing and managing facility points of contact!