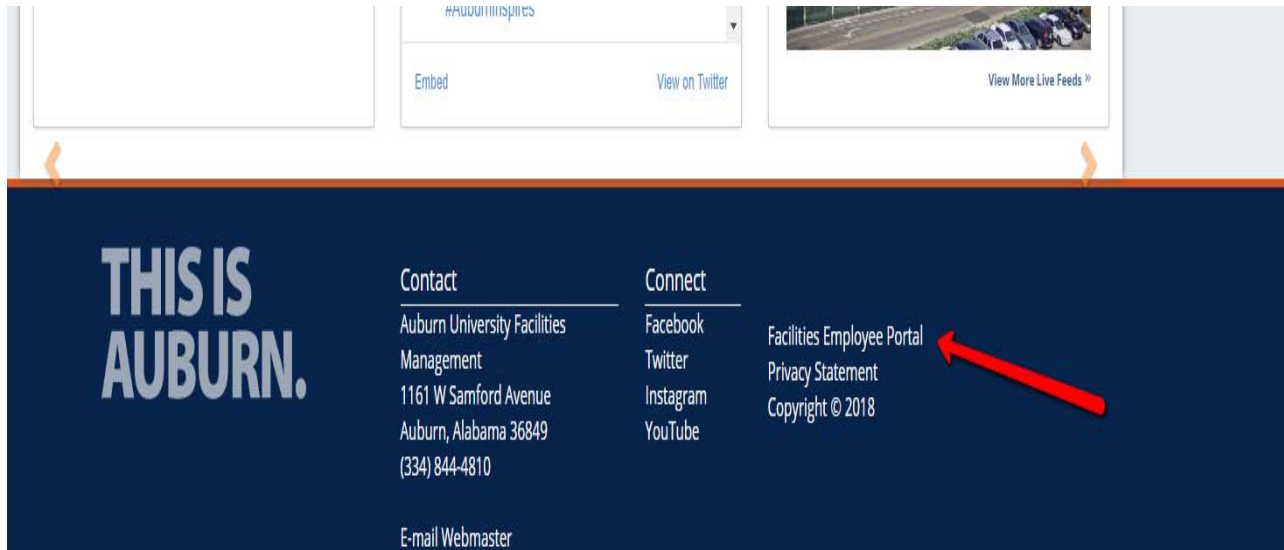


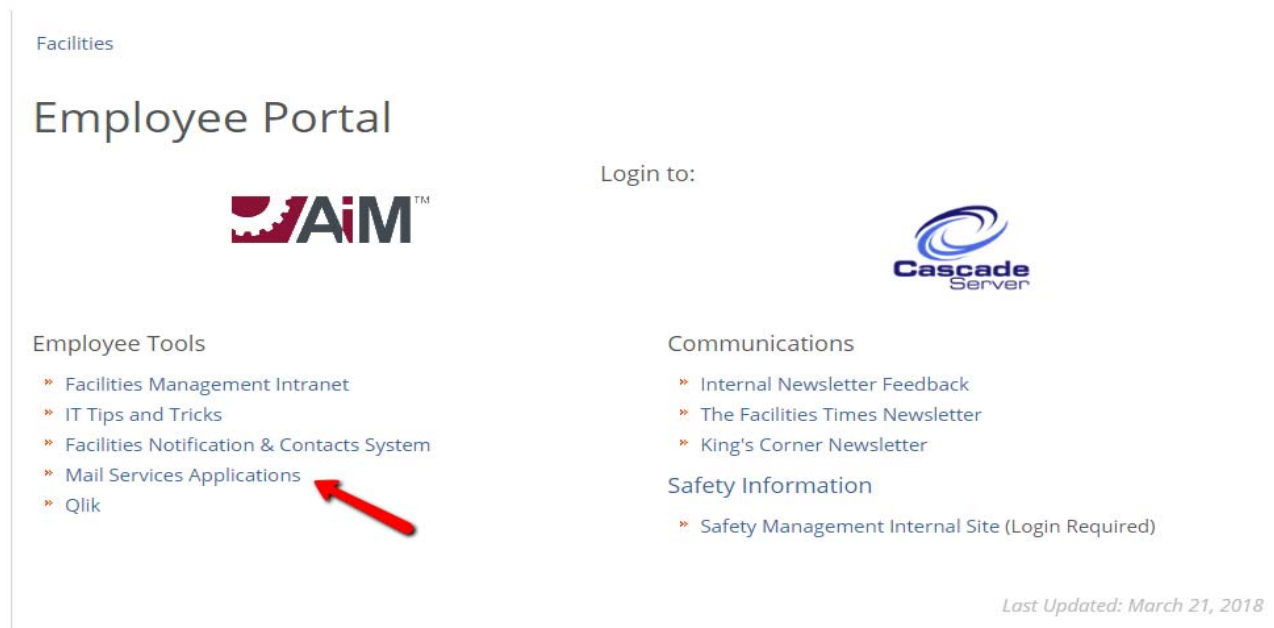
How to Use the
“*Maintain Customer
Information*”
Employee Tool

How to Login

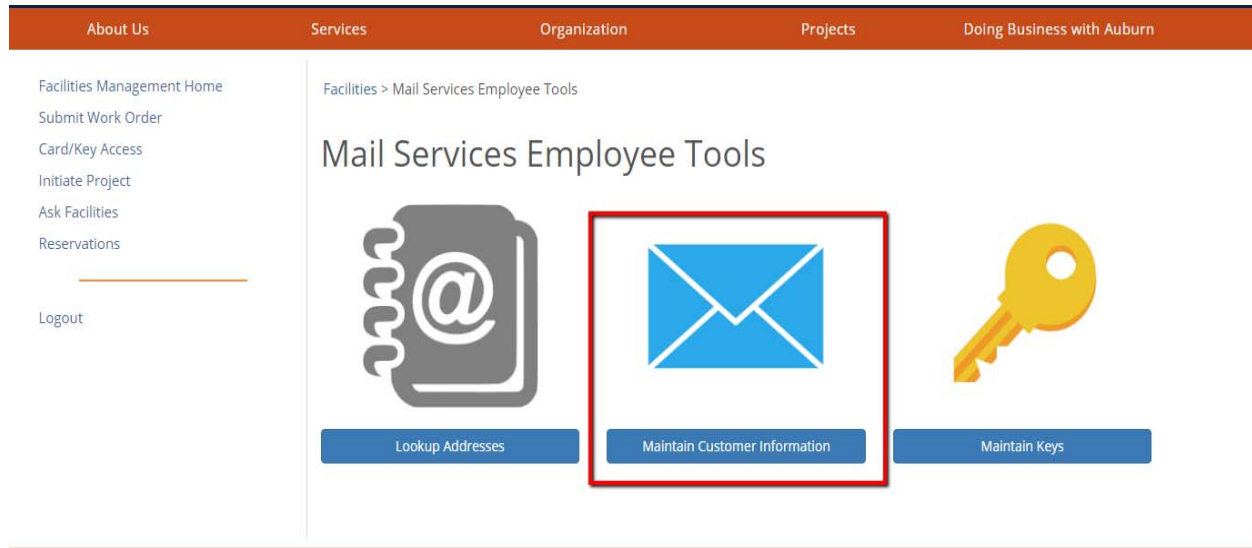
1. Navigate to www.auburn.edu/facilities and click on “Facilities Employee Portal” at the bottom right-hand side of the page.



2. When you get to the portal screen, click on “Mail Services Applications” under “Employee Tools”.



3. Login to the app by using your Auburn credentials.
4. Once you have logged in, click on the blue envelope in the center of the page entitled “Maintain Customer Information”



NOTE: If you would like to simplify the process and skip a couple of steps, simply navigate directly to this web address:

<http://www.auburn.edu/administration/facilities/webapps/mail-services/index.php>

5. When you log into the app, this will take you to the “Account Listing” screen.

Searching Features

In the Account Listing screen pictured below, you can search by meter code, FOP, name, or contact name.

Facilities > Mail Services Employee Tools > Maintain Customer Information

Account Listing

Export to Excel

Active	Flag	Meter Code	FOP	FOP Name	Envelope Name	Contact Name
<input checked="" type="checkbox"/>		5102	1010011100017000	Executive Vice President	Executive Vice President	
<input checked="" type="checkbox"/>		5103	361	ALPHA KAPPA LAMBDA	Controller's Office Admin	Bessie L. Thompson
<input checked="" type="checkbox"/>		5104	1010011010427000	OFFICE OF COMMUNICATIONS & MA	Risk Management	Ginger Vedder
<input checked="" type="checkbox"/>		5105	1010011706587000	VP for research	VP for Research	Giovana Brannan
<input checked="" type="checkbox"/>		5106	1010011010017000	Internal Auditing	Internal Auditing	Kevin Robinson
<input checked="" type="checkbox"/>		5107	1010011135507000	Payroll	Payroll	Judy Wilkes
<input checked="" type="checkbox"/>		5108	1010011581017000	VP Academic Affairs	VP for Academic Affairs	Amanda Malone
<input checked="" type="checkbox"/>		5109	500081100661A200	ATH MARKETING	Communication and Marketing	Barbara Black
<input checked="" type="checkbox"/>		5110	1010011134007000	CONTRACTS & GRANTS ACCOUNTIN	SSOffice of Contracts & Grants	Melanie Cosby
<input checked="" type="checkbox"/>		5111	1010011010217000	INST RESEARCH ASSESSMENT	new name	Amanda Decker
<input checked="" type="checkbox"/>		5113	1010011000007000	Presidents Office	Presidents Office	Kristen Pickle
<input checked="" type="checkbox"/>		5114	1010011001017000	Board Of Trustees	Board Of Trustees	
<input checked="" type="checkbox"/>		5116	1010011136007000	Procurement & Payment Services	Procurement and Payment Services	Susan Salheiser
<input checked="" type="checkbox"/>		5117	1010011135007000	ISS	Information Systems Support	Michael Miller
<input checked="" type="checkbox"/>		5118	1011001140507000	Endowment Investment Off	Treasury Services	Regena Isbell

Tip: For navigating around the screen, you have the scroll bar at the bottom of the listing to move data right and left. As you can see, there is also a scroll bar on the right to move the data up and down. To search, click in the white text boxes and begin keying in the data you are searching for.

NOTE: If you search for a FOP and get an error, it may be that the FOP number is incorrect, or that we do not have the number on file. Put the FOP number in the comments section and we will review it.

1. The ability to search multiple fields gives you the flexibility to do things such as searching the number of FOPs listed under a certain contact name. To do this, simply type the name of the contact you are looking for in the white box under "Contact Name."

< The above example is found in the screenshot on the next page >

Account Listing

Export to Excel						
Active	Flag	Meter Code	FOP	FOP Name	Envelope Name	Contact Name
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Denise Roebuck
✓		5136	500081100661A200	ATH MARKETING	Alpha Phi Omega	Denise Roebuck
✓		5149	INVOICE	Alumni Affairs	Alum. Affairs Correspond.	Denise Roebuck
✓		5150	INVOICE	Auburn Mag/Alumni	Auburn Magazine	Denise Roebuck
✓		5165	922614102048p100	Mell Classroom Building - New Facilit	MDRL Foreign Language Class	Denise Roebuck
✓		5185	INVOICE	CAPITAL CAMPAIGN	Capital Campaign	Denise Roebuck
✓		5191	INVOICE	Auburn Spirit Foundation	Auburn Spirit Foundation	Denise Roebuck
✓		5328	INVOICE	AL Textile Op. Exec.	Al Textile Operation Exec	Denise Roebuck
✓		5329	INVOICE	PHI PSI	Phi Psi	Denise Roebuck
✓		5348	INVOICE	CHEMICAL SOCIETY	Chemical Society/ Goodwin	Denise Roebuck

Editing Features

How to edit the FOP, Envelope Name, Contact Name, or Address:

1. In the Account Listing screen, search for the meter code of the field you wish to edit.
2. Double click the field that you wish to edit and input the new information.
3. When finished with this, scroll to the right on the Account Listing screen and input a reason/summary for the edit under “Comments”. An example of this is listed below.

Account Listing

Export to Excel

Contact name changed by clicking in row under the "Contact Name" heading.

Comment added to document change.

Active	Flag	Meter Code		Contact Name	Address 1	Address 2	Comments	Mod
		5108						
✓		5108	airs	Cristen Chandler	208 Samford Hall		Contact name changed	Criste

NOTE: A few of the fields you cannot modify. For example, FOP Name and Meter Code. In addition, unless you are the manager, you cannot delete or make a meter code "inactive."

How to Sort the Listing

To sort the listing by any column, simply click on the column name and the column will be sorted. Click the column heading again and it toggles between sorting in ascending and descending order.

Account Listing

Export to Excel

Click on any of the column headings and the listing will sort itself.

Active	Flag	Meter Code	FOP	FOP Name	Envelope Name	Contact Name
✗		5911	102002-270755-70070-7	Available for Re-use???	Temp User - AUM Bursar Cashier	Gail Childs
✓		5698	1010021724013010	Auburn Speaks	Auburn Speaks	Barbara Norrell
✓		5696	1010011832406000	Auburn Cares	Auburn Cares	Joetta Good
✓		5690	1010021600073010	K-12 Outreach	K-12 Outreach	Dr. Stacey Nickson
✓		5680	1010021607013010	OLLI	OLLI	Linda Shook
✓		5677	1010021831056000	Center for Leadership	Center for Leadership & Ethics	Alexandria Charles
✓		5674	1010011813506000	AL Prison Art & Educ Prj	Alabama Prison Arts + Education Pro	Kyes Stevens
✓		5670	1040014046013010	ACES: AD Prog Ops & Inn.	ACES: AD for Prog Ops & Innovations	Carol Whatley
✓		5669	1010021261113010	Alabama's Part. On PABS	Alabama's Partnership on PABS	Sheari Moore
✓		5668	1010021834016000	Eagle Eye News	Eagle Eye News	Angela Tulshi
✓		5667	1040014000583010	FAMILY@CONSUMER SCIENCE	Family Consumer Science	Dolores Tiner
✓		5666	1040034045013010	RADON PROGRAM ACES	Radon Grant	Suanne Gilbert
✓		5665	1010021581373010	Distance Learning	Distance Learning	Amy Vaughan
✓		5664	1040014045853010	SALES PUBLICATIONS	Sales Pub & Vis	Christopher White
✓		5663	1040014000523010	EAR office	East Alabama Regional Office	Linda F. Malloy

How to Edit an Email

1. Click on the “Email Listing” tab on the left-hand side of the page.

Facilities Management Home

Submit Work Order

Card/Key Access

Initiate Project

Ask Facilities

Reservations

Mail Services Employee Tools

Account Listing

Add Meter Code

Add Email

Email Listing



NOTE: The email addresses are for the contacts that will receive a mail carrier statement each month. It is possible that more than one person will receive a copy of the same statement. This is perfectly fine.

2. With the Email Listing opened, search for the email that you wish to modify by clicking in the white box under “Email”.

Email Listing

Export to Excel			
✖	Meter Code	Email	Name
	<input type="text"/>	<input type="text" value="anderge@auburn.edu"/>	<input type="text"/>
✖	5550	anderge@auburn.edu	Ginger Anders
✖	5597	anderge@auburn.edu	Ginger Anders
✖	5517	anderge@auburn.edu	Ginger Anders
✖	5536	anderge@auburn.edu	Ginger Anders
✖	5528	anderge@auburn.edu	Ginger Anders

3. To change the selected email, double click in the email column, and type in the revised email. Once you've entered the information press enter or tab. You should see the change.

Email Listing

Export to Excel			
✖	Meter Code	Email	Name
	<input type="text"/>	<input type="text" value="anderge@auburn.edu"/>	<input type="text"/>
✖	5550	slf0015@auburn.edu	Ginger Anders
✖	5597	anderge@auburn.edu	Ginger Anders
✖	5517	anderge@auburn.edu	Ginger Anders
✖	5536	anderge@auburn.edu	Ginger Anders
✖	5528	anderge@auburn.edu	Ginger Anders

Email revised.

NOTE: One or more rows of information may appear, and this is ok. You may have more than one email contact for a meter code.

How to Add a New Email Contact for a Meter

1. Click on the tab on the left-hand side of the screen named “Add Email”.

Facilities Management Home

Submit Work Order

Card/Key Access

Initiate Project

Ask Facilities

Reservations

Mail Services Employee Tools

Account Listing

Add Meter Code

Add Email

Email Listing



2. Fill in all necessary fields and when finished, click “add”.

Add Email

Meter Code

Email

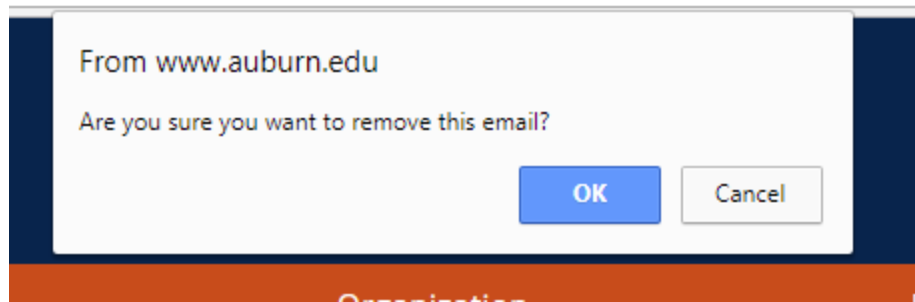
Name

Add

NOTE: To check that the email has been added, click on “Email listing.”

How to Remove an Email Listing for a Meter

1. To remove a certain email from a meter, simply click on the red “X” beside the row of the email you wish to remove in the “Email listing” screen.
2. You will be shown the following message. Click “OK.”



3. When you do this, the email will be scratched through and removed from the meter code.


Email Listing

Export to Excel			
X	Meter Code	Email	Name
	<input type="text"/>	<input type="text"/>	<input type="text"/>
X	5103	thompbe@auburn.edu	Bessie L. Thompson
X	5104	vav0001@auburn.edu	Ginger Vedder
X	5105	brannsg@auburn.edu	Giovana Brannan
X	5106	srh0009@auburn.edu	Sarah Savage

How to Export to Excel

To export the Account Listing to Excel, simply click the “Export to Excel” icon in the upper left-hand corner of the blue box, and the file will be downloaded to your Browser’s default download folder. You may be prompted to save and download the new file. NOTE: You can also export a listing that you have sorted or filtered.

Account Listing

 Export to Excel						
Active	Flag	Meter Code	FOP	FOP Name	Envelope Name	Contact Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>		5102	1010011100017000	Executive Vice President	Executive Vice President	
<input checked="" type="checkbox"/>		5103	361	ALPHA KAPPA LAMBDA	Controller's Office Admin	Bessie L. Thompson
<input checked="" type="checkbox"/>		5104	1010011010427000	OFFICE OF COMMUNICATIONS & MA	Risk Management	Ginger Vedder
<input checked="" type="checkbox"/>		5105	1010011706587000	VP for research	VP for Research	Giovana Brannan
<input checked="" type="checkbox"/>		5106	1010011010017000	Internal Auditing	Internal Auditing	Kevin Robinson
<input checked="" type="checkbox"/>		5107	1010011135507000	Payroll	Payroll	Judy Wilkes
<input checked="" type="checkbox"/>		5108	1010011581017000	VP Academic Affairs	VP for Academic Affairs	Amanda Malone
<input checked="" type="checkbox"/>		5109	500081100661A200	ATH MARKETING	Communication and Marketing	Barbara Black
<input checked="" type="checkbox"/>		5110	1010011134007000	CONTRACTS & GRANTS ACCOUNTIN	SSOffice of Contracts & Grants	Melanie Cosby
<input checked="" type="checkbox"/>		5111	1010011010217000	INST RESEARCH ASSESSMENT	new name	Amanda Decker
<input checked="" type="checkbox"/>		5113	1010011000007000	Presidents Office	Presidents Office	Kristen Pickle
<input checked="" type="checkbox"/>		5114	1010011001017000	Board Of Trustees	Board Of Trustees	
<input checked="" type="checkbox"/>		5116	1010011136007000	Procurement & Payment Services	Procurement and Payment Services	Susan Salheiser
<input checked="" type="checkbox"/>		5117	1010011135007000	ISS	Information Systems Support	Michael Miller
<input checked="" type="checkbox"/>		5118	1011001140507000	Endowment Investment Off	Treasury Services	Regena Isbell

If you need further assistance, please contact Auburn University Facilities IT group at 334-844-7877 or email eud0001@auburn.edu