Procedure: Customer Asks RSI to Use the Same Sub as Last Time/Correct and Submit Subscriber’s list

Purpose: We are often asked to just us the same subscriber’s list as last time. So this procedure shows you how to do that.

STEPS:

RETRIEVE DATA.

Pull their data from the last filing period.

Open the SEP Server App.

Go to the customer by Cust\_ID.

Find the filing period and select.

Go to Subscribers and pull the original data set. It should be a .csv file.

Move it over to Customer > “Customer\_Name Cust\_ID” in the new billing period. You may need to create this billing period for the customer.

Verify the file using the new Subscriber File Validation Software (See Procedure: Subscriber File Validation Software)

Open the “File\_name\_Corrected\_Subscribers.xlsx” file and look for any red fields.

You will need to correct the errors that are identified in red. Those that you cannot correct, simply remove the row with the red error field.

Once complete, you will need to remove the Orig\_Row\_Num Column (A) and save the file as “File\_name\_Corrected\_Subscribers\_Mod\_1.csv.”

Log into the customers RSI account and upload the customer’s subscriber file.

If the file is accepted by the program, a new directory will be created called subscription processed.