Customer Service Macro Guide

Digital Cell Team: 09/01/2022
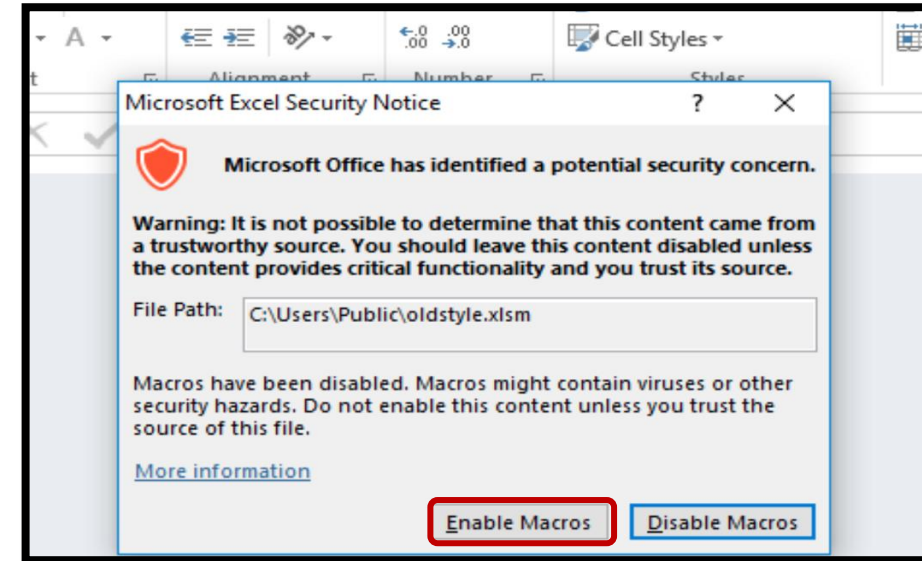
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SUMMARY

1. Notification Phase

2. Consolidation Phase

1. Notification Phase

- **Step 1:** Open the file, in case you get the Security Notice pop up make sure to select the <u>Enable Macros</u> option.

- **Step 2:** Browse the CS Proactive PO Management and export as summarized data the report on the Follow-up View.

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1. Notification Phase

- **Step 3:** Copy the data downloaded to the "Data" tab in the macro and keep just the lines you want to send. Make sure the headers are copied in the first row.

- **Step 4:** Select either if you want to review every email to the suppliers before sending them or if you want to send them automatically.

Note: In case you select Yes, all the emails will show up as in the image before sending

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1. Notification Phase

- **Step 5:** Run the macro with one of the following options:

  - A) Two steps:

    1. Click the Organize Data button and review the format on the "Result tab"

    2. After reviewing the data send the email by clicking the second button.

  - B) One step:

    1. Click the Sending Emails button to automatically mail to the suppliers

Note: Before running the macro make sure to have all the supplier contacts on the "AssignationList" tab

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2. Consolidation Phase

- **Step 1:** On your email create two folders inside the Inbox with the following names:

  - A) CS_Ans: This folder will contain all the new answers that needs to be consolidated.

  - B) CS_Read: This folder will contain all the supplier answers that were previously consolidated.

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives
sent only to me
  and with SLB Customer Service in the subject
  and which has an attachment
move it to the CS_Ans folder
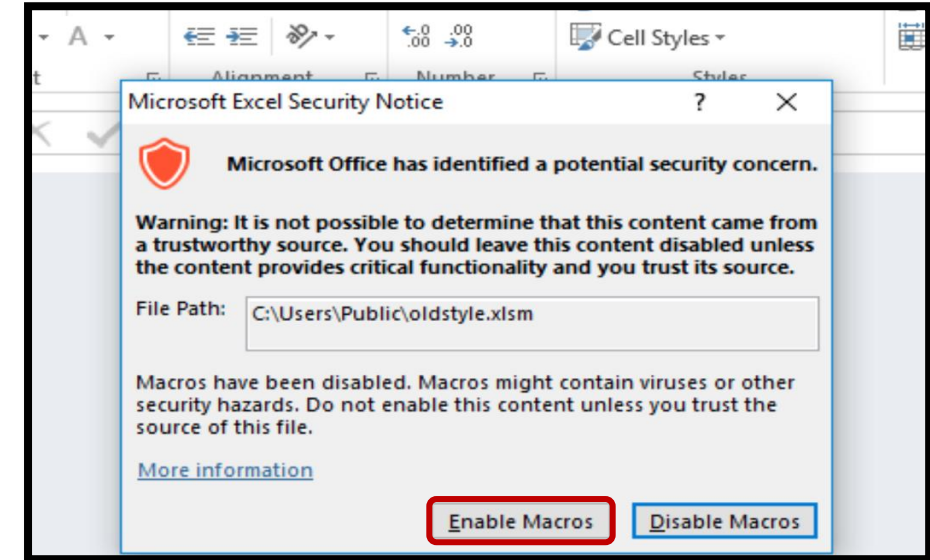 and stop processing more rules
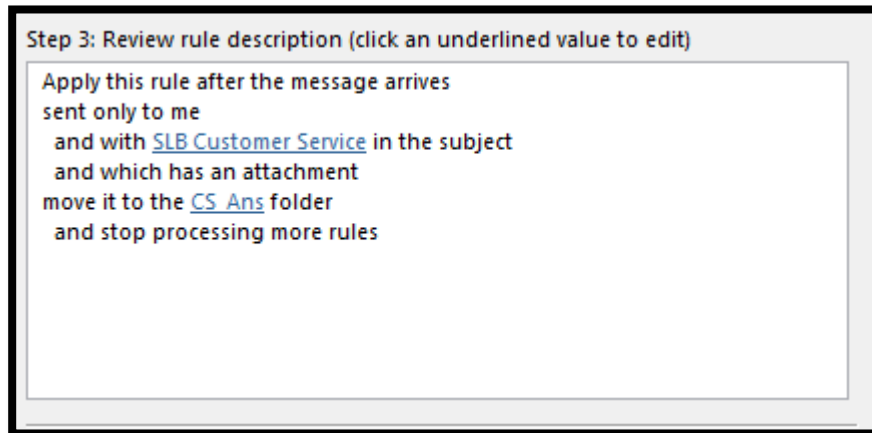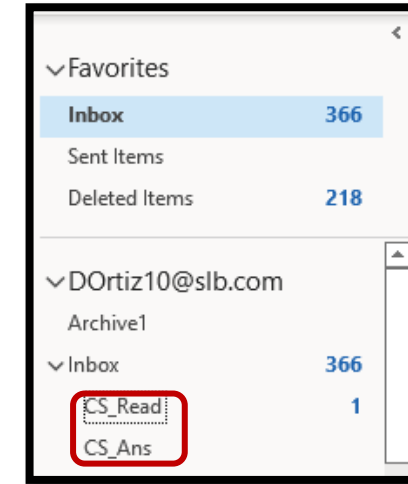
- **Step 2:** Create a rule on outlook to save automatically the emails on the corresponding folder as is shown in the image at the left. You may need to click on the advance options.

*Note: Step 1 and 2 needs to be done just the first time

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2. Consolidation Phase

- **Step 3:** Open the file, in case you get the Security Notice pop up make sure to select the <u>Enable Macros</u> option.

- **Step 4:** Browse the <u>CS Proactive PO Management</u> and export as summarized data the report on the Follow-up View.

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2. Notification Phase

- • **Step 5:** Copy the data downloaded to the Data tab in the current file. This will be the information use to create the mass upload.

- • **Step 6:** Click the Consolidation Phase Button.

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2. Notification Phase

- **Step 7:** Review the Consolidation Report on the "Consolidation" Tab. Put attention on the "Already delivered" Lines that are shown in column S, these lines were not found in the Report pasted on the data tab and may need to be review by the Agent.

- **Step 6:** Review and save the mass upload file created automatically by the macro. Then Submit into SAP through the transaction ZSUP_POACK

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