Setup to Run Inventory Report

FIRST TIME SETUP

* Go to Operations SharePoint. On the left side under Documents, press Sync. This process could take some time.
* Once complete, on the Operations SharePoint. Navigate to Projects -> InventoryReports -> Macro Utility
* Download and save the two (2) ".bas" files to your computer and remember where you saved them (DailyInventoryTable.bas & OutlookDailyInventoryMacro.bas)

EXCEL

1. Open up a new excel workbook
2. If there is no "DEVELOPER" tab in the top menu, do the following. Go to File -> Options -> Customize Ribbon. Then, in the second list of items you should see a box that says "Developer". Check this box and press OK.
3. Click on the VIEW tab, press "Unhide" (located next to "Freeze Panes"), a dialog box will popup. Select PERSONAL \*(see below if PERSONAL is not there), and then press OK. Do not close the excel workbook that opens.

* \* If you do not see the PERSONAL Notebook you will need to create it. To do this, press Save As in a blank excel workbook. Then, you must save the workbook as an "Excel Binary Workbook" to \*\*C:\Users\"your\_username"\AppData\Roaming\Microsoft\Excel\XLSTART

This workbook is now your PERSONAL workbook and you may continue.

* \*\* Note: the AppData Folder may be hidden. To unhide it, navigate to C:\Users\"your\_username" in the windows file explorer, not through Excel. Click on the View tab in the top bar. Then check the box named "Hidden Items" (it will be towards the right side). The AppData folder should appear and you can go back and save the PERSONAL notebook to the path listed above.

1. While staying in the newly opened PERSONAL workbook, click on the developer tag, then "Visual Basic" (located on the far left). A new window should open.
2. In the new window, click File -> Import File.. , navigate to the folder of the macros you downloaded. Click on the macro named "DailyInventoryTable.bas" and open it.6
3. Now, in the top menu press Tools -> References, then scroll down and find "MicrosoftScripting Runtime", check the box next to it and press OK.
4. Finally, go to File -> Save PERSONAL.xlsb
5. You may now close the window that opened up, navigate back to the VIEW tab in the PERSONAL workbook. In the VIEW tab press Hide to close the PERSONAL workbook.

OUTLOOK

NOTE: the steps for Outlook will be very similar to Excel

1. Open Outlook
2. If there is no "DEVELOPER" tab in the top menu, do the following. Go to File -> Options -> Customize RibbonThen, in the second list of items you should see a box that says "Developer". Check this box and press OK.
3. Navigate to the DEVELOPER tab, then press Macro Security. Check "Enable all macros" and then press ok.
4. Next, in the DEVELOPER tab, press Visual Basic, then File -> Import File.. , navigate to the folder of the macros you downloaded. Click on the macro named "OutlookDailyInventoryMacro.bas" and open it.
5. Now, in the top menu press Tools -> References, then scroll down and find "Microsoft Excel xx.0 Object Library", check the box next to it and press OK.
6. File -> Save and close the Visual Basic Editor

OUTLOOK RULE SETUP

* A rule can be set up so that any incoming inventory report emails automatically get sent to the folder

1. Under the HOME tab, in the Move Box, click on Rules -> Manage Rules and Alerts..
2. Press New Rule then "Move messages with specific words in the subject to a folder" and press Next
3. Towards the bottom of the new window there should be a box that contains:

"Apply this rule after the message arrives

with specific words in the subject"

specific words should be blue and underlined...click on "specific words"

1. Type in the subject lines of the emails one by one and press add:

GMB Daily Inventory Report

Brew Detroit Daily Inventory

On Hand Inventory By SKU

AGED FG

Joliet On Hand Inventory

1. Press Next, and in the next window check the box "move it to the specified folder"
2. Again in the bottom box, the words "specified folder" should be underlined and blue. Click on them and select the "Inventory Reports Macro" folder
3. Press next, and then next again at the exceptions screen unless there are known exceptions.
4. Finally, you can name the rule if you'd like, make sure the box "Turn on this rule" is checked", and press Finish

PYTHON SCRIPT SETUP

1. Navigate to \Projects\InventoryReports\Macro Utility on the SharePoint and download the Lindner\_Scrape folder.
2. Save this folder to the Desktop
3. The folder can be hidden if desired and the macro will still run correctly.

PART 2: Running the Macro

* If the code is working correctly, then the macro should run automatically, however, if the report needs to be run manually, below will accomplish that.

1. In Outlook, Click on the DEVELOPER tab, click Macros, then select \_\_\_\_.completeDailyInventory

-"\_\_\_" will most likely be something like Project1

1. The Macro will now run and save an inventory report excel file to the Operations SharePoint
2. The report can be found by opening the Operations SharePoint page, then Projects -> Inventory Reports
3. The report will be named "mm\_dd\_yyyy\_InventoryReport"

References Needed:

-To check if these references are added, go to Developer Tab -> Visual Basic

-Once Visual Basic opens, go to Tools in the top menu bar and then References

-Scroll and check any unchecked references needed

Outlook:

Visual Basic For Applications

Microsoft Outlook 15.0 Object Library

OLE Automation

Microsoft Office 15.0 Object Library

Microsoft Scripting Runtime

Microsoft Excel 15.0 Object Library

Excel:

Visual Basic For Applications

Microsoft Outlook 15.0 Object Library

OLE Automation

Microsoft Office 15.0 Object Library

Microsoft Scripting Runtime