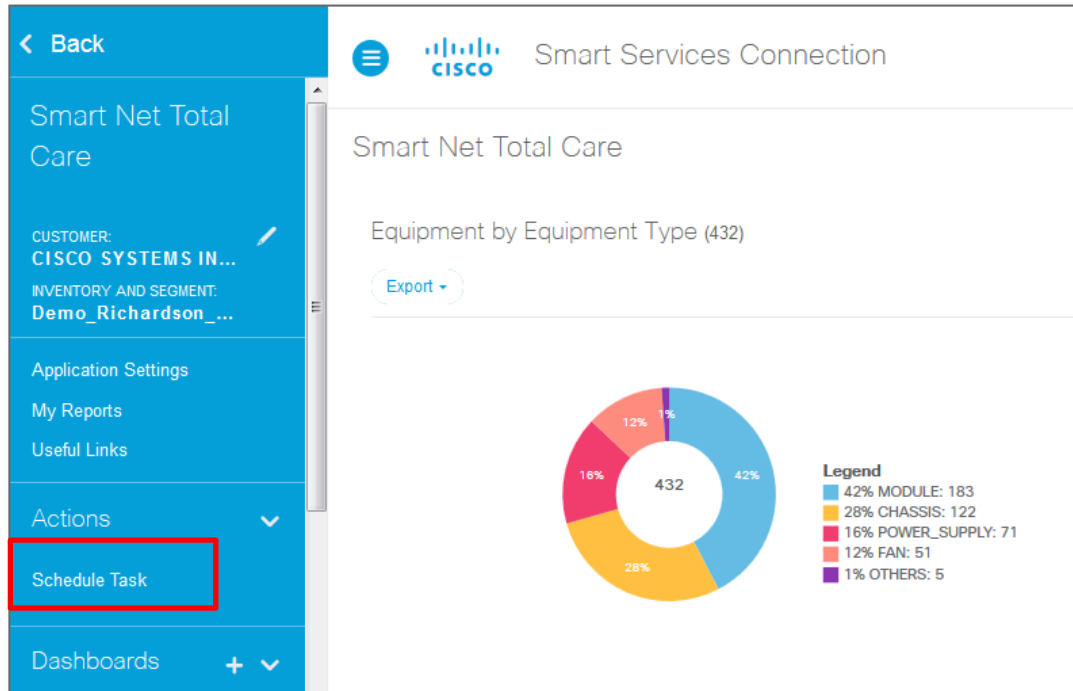




How to use the Offline Macro within the Smart Net Total Care Portal

Requesting Required Reports from the Portal



To request the **Product Alerts** and **Custom Inventory** reports within the new portal, click **'Schedule Task'** under the **'Actions'** section in the left navigation panel

Requesting Required Reports from the Portal

Smart Services Connection

Schedule Task

+ Schedule Task

2016 Fri, May 6 Sat, May 7 Sun, May 8 Mon, May 9

12 am

1 am

2 am

3 am

4 am

5 am

6 am

Please select event type:
Product Alerts Report

Proceed Cancel

Next, click **'Schedule Task'**.

Then select **'Product Alerts Report'** from the drop-down list.

And click **'Proceed'**.

Requesting Required Reports from the Portal

Schedule Report(s): Product Alerts Report Help

Name and Description

Set up Recurrence

Enter Notification

Generate Report

Name and Description

Report Name: Product Alerts Report_sydfishe_146257676336*

Description(Optional):

Default Setting:

Customer: CISCO SYSTEMS INC FOR US
INTERNAL DEMO EVAL ONLY

Inventory / Segment: Demo_Richardson_DC

Recurrence: Once, immediately

Format: XLS PDF

Notify Me: by Email and Notification

Select Run Now for quick report or click Next to see more options.

Close Run Now Next

The default for this report is set to 'XLS', this should be selected, but please verify the blue radio button is selected to the left of 'XLS'.

To generate the report immediately, click **'Run Now'**.

An information prompt will display to confirm the report has been requested. Click **'OK'**.

Optional: Use the report scheduler to automatically generate this report by clicking **'Next'**, and following the schedule wizard.

Requesting Required Reports from the Portal

Smart Services Connection

My Reports (1)

Export

Report Name	Download	Inventory	Segment	Status
...
<input type="checkbox"/> Product Alerts Report...	XLSX	Demo_Richardson...		Success

You will receive an email from the tool to your registered email address once the data is available. The files can be found in the **'My Reports'** section on the left navigation panel.

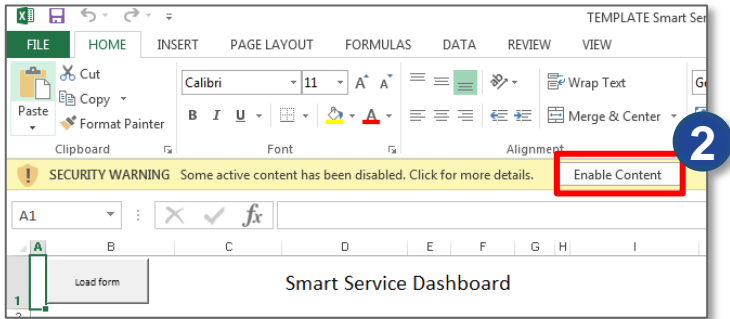
Click the **'XLSX'** link to download the report. Save it to your machine.

Repeat this process, but request the **'Custom Inventory'** report.

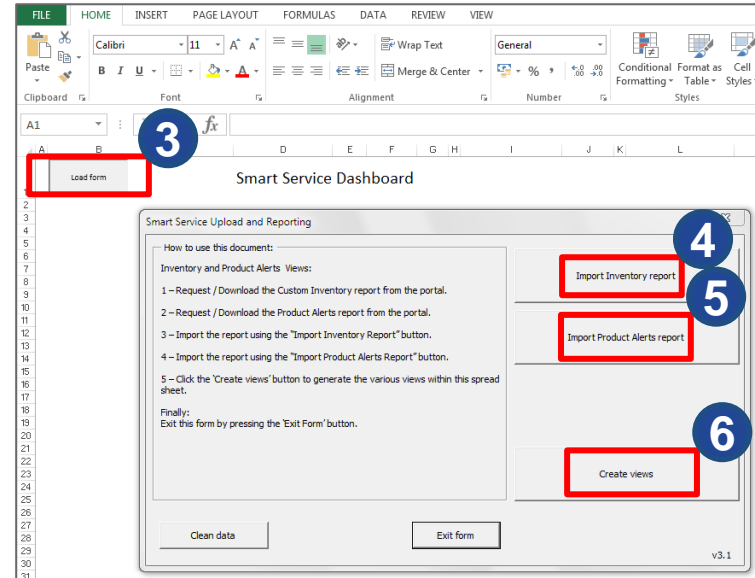
Finally, import the data into the macro using the instructions on the next slide.

Importing Reports into the Macro

1. Open the macro from your hard-drive.
2. Upon prompt click, **'Enable Content'**.



3. Click, **'Load form'**.
4. Click, **'Import Inventory report'**.
 - Select the inventory file you downloaded previously from the portal.
 - Click **'OK'** when done.
5. Click, **'Import Product Alerts report'**.
 - Select the product alerts file you downloaded previously from the portal.
 - Click **'OK'** when done.



*Note: Click, **'Clean data'** to clear data from macro and restart the process*

6. Click, **'Create views'** to generate the Dashboard report and various tabs.
7. Click, **'Exit form'**.

