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1.0 PURPOSE

This document explains how to use the CS/Sales Exceptions Notifications Form Letter.

2.0 REFERENCES

Document Number	Title
CSF 70-42-006	CS/Sales Exceptions Notification Form Letter

3.0 DEFINITIONS AND ACRONYMS

Term	Definition
CS	Customer Support
ENFL	Exceptions Notification Form Letter
Macro	Recorded commands in MS Word which are then accessed through a single simple step., command, or click on a toolbar command
Plants and Sales Reps Toolbar	Special toolbar provided in the document CSF 70-01-001.dot, for accessing macros to complete the RMA Validation form

4.0 RESPONSIBILITIES

All Sales/CS Representatives are to follow these instructions when completing the Exceptions Notifications Form letter.

5.0 ABOUT THE EXCEPTIONS NOTIFICATIONS FORM LETTER (ENFL)

The ENFL is a Word template and saved as a .DOT file. It is used to create exceptions letters for customers, and includes macros that let you quickly enter the desired information in the letter.

5.1 **Open the Exceptions Notifications Form Letter**

1. Open MS Word.
2. On the File menu, select **New**.

The New Document task pane appears to the right of Word (Figure 1).

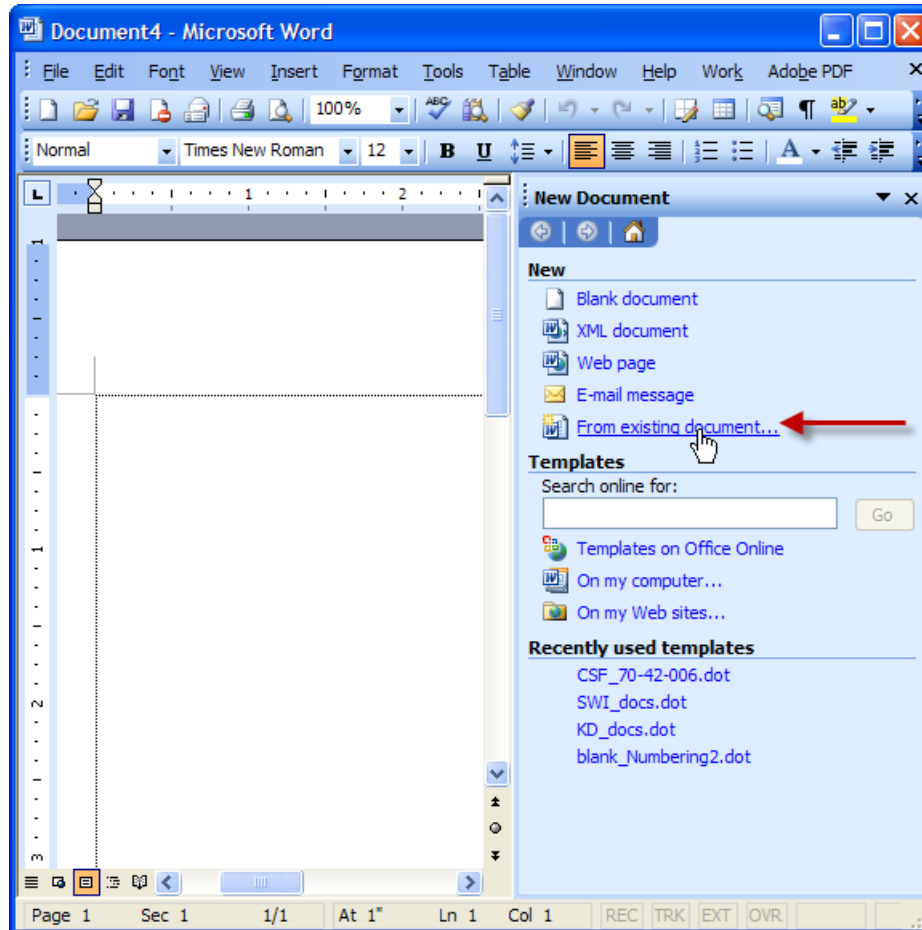


Figure 1. Opening a New Document Based on a Different Document

3. Under the New section, click **From existing document...** (Figure 1).

The "New from existing document" dialog box appears (not shown).

4. Navigate to:

<\\bear-plt01-srv1\shared\Intranet\Sales\Public\SalesTemplates> and select **Exceptions_CSF_70-42-006.dot**.

- A new document appears in Word (1 in Figure 2).
- There are fields for clicking and entering data (2 in Figure 2). Unneeded lines with these fields can be deleted.
- A new Text and Sales Representatives toolbar appears (3 in Figure 2).
- There are drop-down fields from which you can choose the correct text (4 in Figure 2).



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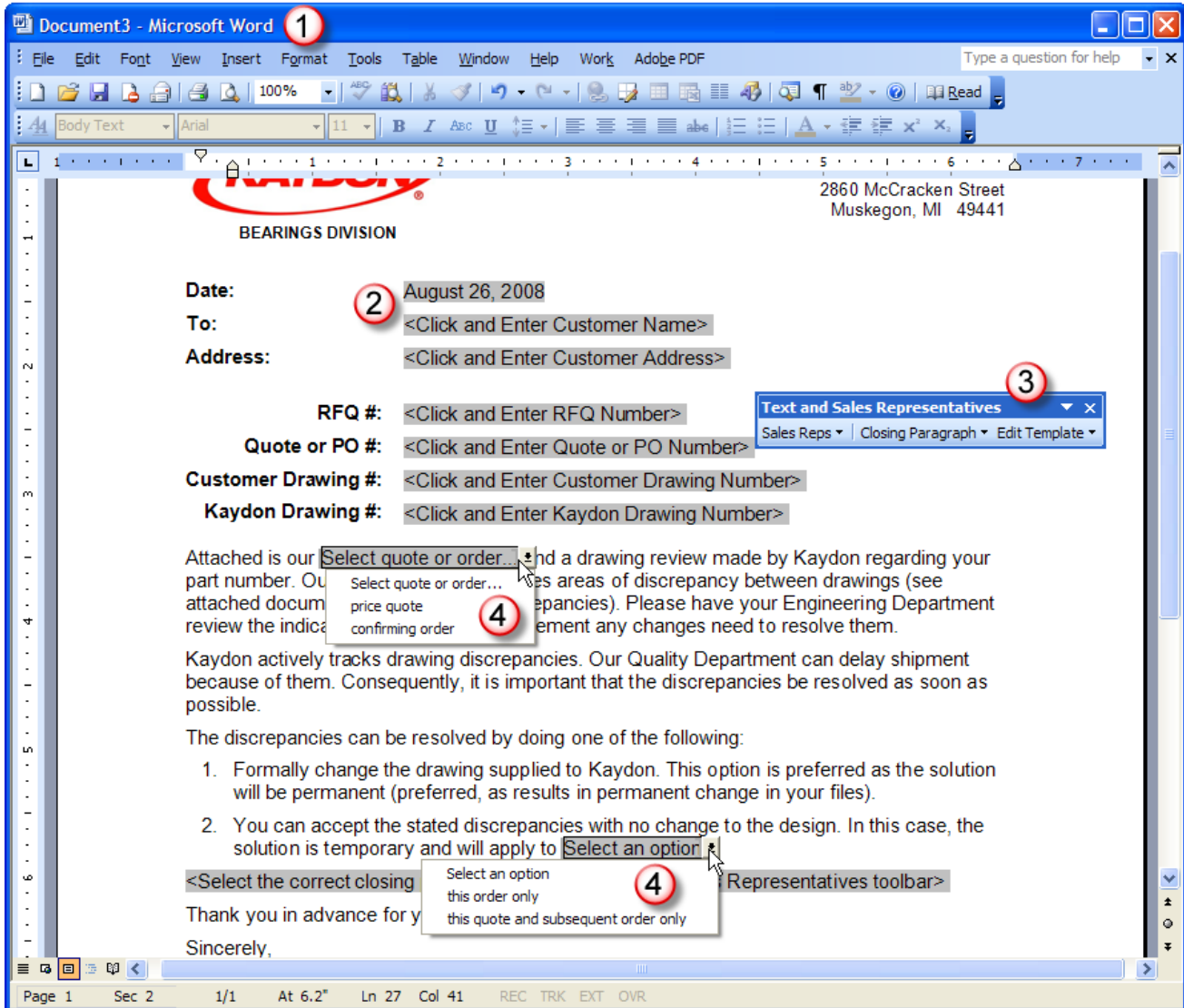
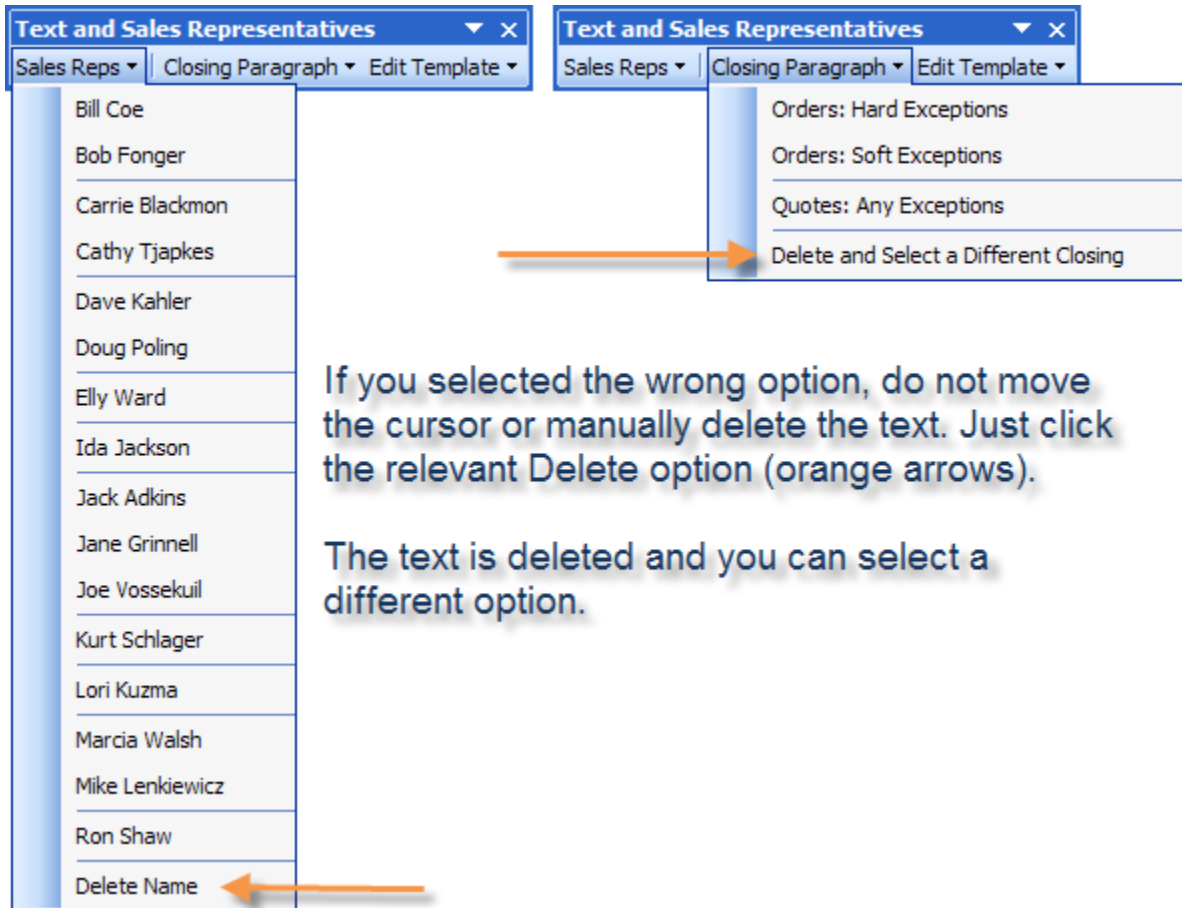


Figure 2. Initial Appearance of the Exceptions Notification Form Letter



If you selected the wrong option, do not move the cursor or manually delete the text. Just click the relevant Delete option (orange arrows).

The text is deleted and you can select a different option.

Figure 3. Text and Sales Representatives Toolbar

5.2 Enter Text in the ENFL

The easiest way to enter text is to simply click in the desired field and either enter the desired information, or select the required option. Since only parts of the form are protected, *pressing <Tab> does not jump to the next field.*

Enter data as follows:

- Date:** Click the date and Press <Ctrl + Shift + F9> to make the date permanent.
If you do not do this, the date will change to the current date, every time you reopen the file.
- To:** Click in the field and enter the customer's name
- Address:** Click in the field and enter the customer's address.
- RFQ#:** Click in the field and enter the RFQ number.
If you do not need this information, select the row and delete it.
- Quote or PO#:** Click in the field and enter the quote or PO# from Syteline.



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6. **Customer Drawing #:** Click in the field and enter the customer drawing number.
7. **Kaydon Drawing #:** Click in the field and enter Kaydon's drawing number.
8. **Select Quote or Order:** This is a text options drop-down box.
 - Select **price quote** if this is relating to a price quote for the customer.
 - Select **confirming order** if this is a confirmation of a customer order.
9. **Select an option:** This is a text options drop-down box.
 - Select **this order only** if the issue relates only to the current order.
 - Select **this quote and subsequent order only** if the issue relates to the quote being submitted and the order resulting from this quote.
10. **Select the correct closing paragraph from the Text and Sales Representatives toolbar:** Select the desired option from the Text and Sales Representatives toolbar. Text entered is as shown in Table 1.
11. Select your name from the Text and Sales Representatives toolbar: Select your name as shown in Figure 3.

Table 1. Text Options and Resulting Text

Closing Paragraph Option	Resulting Text
Orders: Hard Exceptions	If we do not receive a written response from you within 10 days of receipt of this letter, <i>your order will be placed on hold until the discrepancies are resolved.</i>
Orders: Soft Exceptions	If we do not receive a written response from you within 10 days of receipt of this letter, <i>we will process your order according to our Kaydon drawing specifications.</i> We must hear from you if you want the discrepancies to be resolved before filling your order. Thank you in advance for your attention to this matter.
Quotes: Any Exceptions	If you decide to accept the discrepancies, please be sure to indicate this in writing on any purchase order issued based on this quote.

5.3 Finishing the ENFL

Be sure to attach a copy of the specifications drawing and a separate list of discrepancies with the letter, before sending it by fax or email to the customer.

6.0 EDITING THE DEFAULT TEXT OR SALES REPRESENTATIVE INFORMATION

You must use the Microsoft Visual Basic editor to edit the names of Sales Representatives, or add a new name. Certain text is entered via Form Fields; other text is entered as an auto text entry. ***Read these instructions carefully before updating the default list of names or text.***



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6.1 Open the ENFL for Editing Default Options

- In MS Word, open the document **Exceptions_CSF_70-42-006.dot**.
 - ◆ The document is located in the SalesTemplates directory on the Intranet.
 - ◆ Make sure the document attributes are not set to Read Only. If the attributes are set to this value, change them.

6.2 Change Control of the ENFL

After you have changed and tested the template, give it to the CS Manager or designee for approval and storing on the network, for permanent storage of the template with all previous versions.

6.3 Update a Name

1. Open the source template as detailed in Section 6.1.
2. The Visual Basic Editor appears.
 - Make sure that you are looking at the macros for Exceptions_CSF_70-42-006.dot (yellow highlight in Figure 4).
 - The macros are edited in the right panel (pink areas in Figure 4).
 - The phrase "Sub" indicates the beginning of a macro.
 - The phrase "End Sub" indicates the end of a macro.

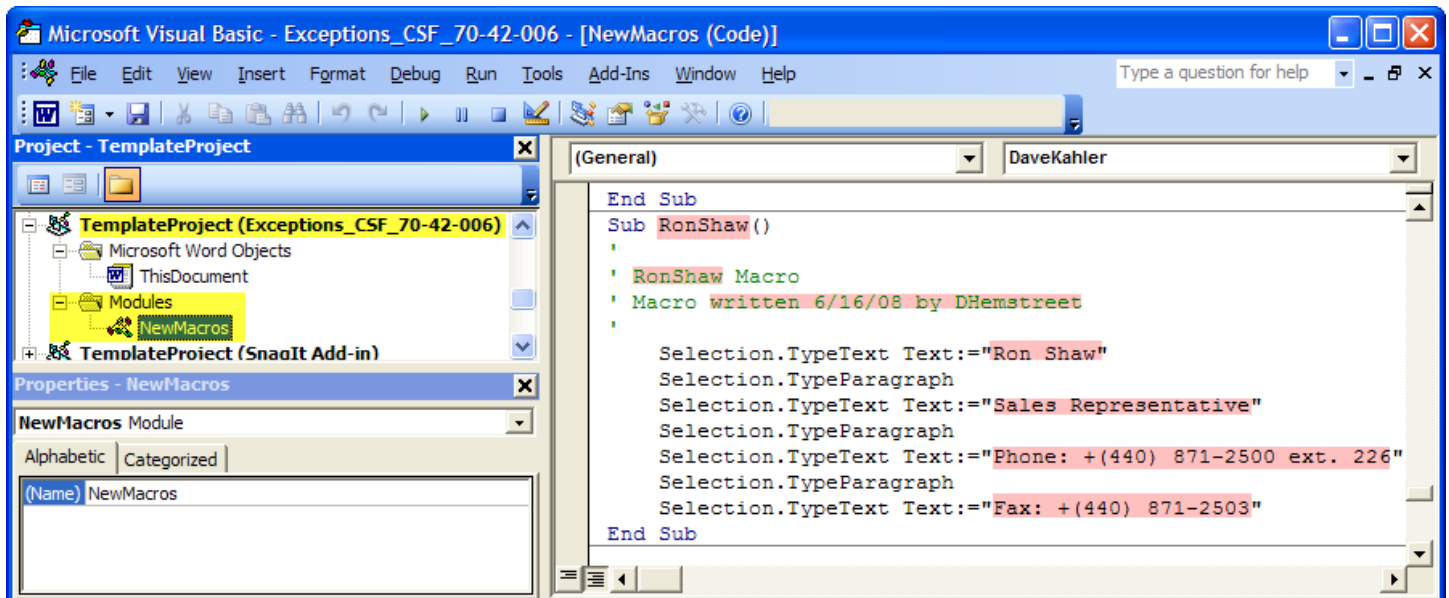


Figure 4. Visual Basic Editor for Macros in CSF_70-01-001

3. Scroll through the macros to find the one you want to edit. For this example, locate the macro called "RonShaw".



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- a. Ron has a new job title. Note the text "Sales Representative" in Figure 4. Replace all text between the quotation marks with the new job title.
 - b. Ron has a new phone extension. Note the text **ext. 226**". Simply write the new number in and delete the 283.
 - c. Edit the rest of Ron's information as needed.
 - d. For best practices, change the line 3 of the macro from "Macro written 6/16/08 by Dhemstreet" to "Macro **edited date** by **your name**" (Example: Macro edited 8/29/08 by TJones)
4. Press **<Ctrl+S>** to save your changes.
 5. Close the Visual Basic window by clicking the red and white X at the top right of the window.
 6. Save and close **Exceptions_CSF_70-42-006.dot**
 7. You can now see **Exceptions_CSF_70-42-006.dot**.
 8. Change the file attributes to Read Only (to prevent accidental permanent changes to the template).

6.4 Create a New Name

1. Open the source template as detailed in Section 6.1.
2. In MS Word, open the document **Exceptions_CSF_70-42-006.dot**.
 - The document is located in the SalesTemplates directory on the Intranet.
 - Make sure the document attributes are not set to Read Only. If the attributes are set to this value, change them.
3. On the "Text and Sales Representatives" toolbar click "Edit Template" and select **Edit Addresses/Sales Reps**.
4. The Visual Basic Editor appears.
 - Make sure that you are looking at the macros for Exceptions_CSF_70-42-006.dot (yellow highlight in Figure 4).
 - The macros are edited in the right panel (pink areas in Figure 4).
 - The phrase "Sub" indicates the beginning of a macro.
 - The phrase "End Sub" indicates the end of a macro.
5. Copy the text from "Sub" through to "End Sub" for one of the macros. In this example you will create a new sales representative name based on the "RonShaw" macro.
 - a. Scroll to the end of the macros and place your cursor at the end of the last "End Sub" statement.
 - b. Press **<Enter>**.
 - c. Paste the copied text.



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You are now looking at text as shown in Table 2.

- d. Change the text to appear as shown in the "Revised Macro" column in Table 2.

Revised text is in **bold and red**.

Table 2. Editing a Macro in CSF_70-01-001.dot

Original Macro	Revised Macro
<pre>Sub RonShaw ' ' RonShaw Macro ' Macro recorded 3/19/2008 by DHemstreet ' Selection.TypeText Text:="Ron Shaw" Selection.TypeParagraph Selection.TypeText Text:=" Sales Representative" Selection.TypeParagraph Selection.TypeText Text:="Phone: +(231) 755-3741 ext. 226" Selection.TypeParagraph Selection.TypeText Text:="Fax: +(231) 755-7065" End Sub</pre>	<pre>Sub JohnDoe() ' ' JohnDoe Macro ' Macro edited 3/30/2008 YourName ' Selection.TypeText Text:="John Doe" Selection.TypeParagraph Selection.TypeText Text:="Sales Administrator" Selection.TypeParagraph Selection.TypeText Text:="Phone: +(231) 755-3741 ext. 211" Selection.TypeParagraph Selection.TypeText Text:="Fax: +(231) 755-70XX" End Sub</pre>

6. Press **<Ctrl+S>** to save your changes.
7. Close the Visual Basic window by clicking the red and white X at the top right of the window.
 You can now see Exceptions_CSF_70-42-006.dot.
8. Click anywhere on any toolbar. A drop-down list of available toolbars appears. At the bottom of the list is the option, "Customize". Click **Customize**.

The Customize dialog box appears.

9. Proceed as follows:
 - a. Click the Toolbars tab and make sure that the Text and Sales Representatives toolbar is displayed.
 - b. Click the Commands Tab.
 - i. In the Categories area, select Macros.
 - ii. In the Save In drop-down box, select the document name (Exceptions_CSF_70-42-006.dot).
 - iii. In the Commands area, scroll to the "JohnDoe" macro (left, Figure 5). (All macros receive a prefix "Project.NewMacros.XXX" where XXX is the name you are looking for).
 - c. In the Commands area, drag and drop the macro to the desired place on the Sales Reps menu of the Text and Sales Representatives toolbar. Note that the full macro name appears.
 - i. Right-click the macro name on the drop-down men (right, Figure 5).
 - ii. In the drop-down list that appears, go into the Name field and change the name to "John Doe".

10. Click outside of the menu and Close the Customize dialog box.
11. Save and close **Exceptions_CSF_70-42-006.dot**
12. Change the file attributes to Read Only (to prevent accidental permanent changes to the template).

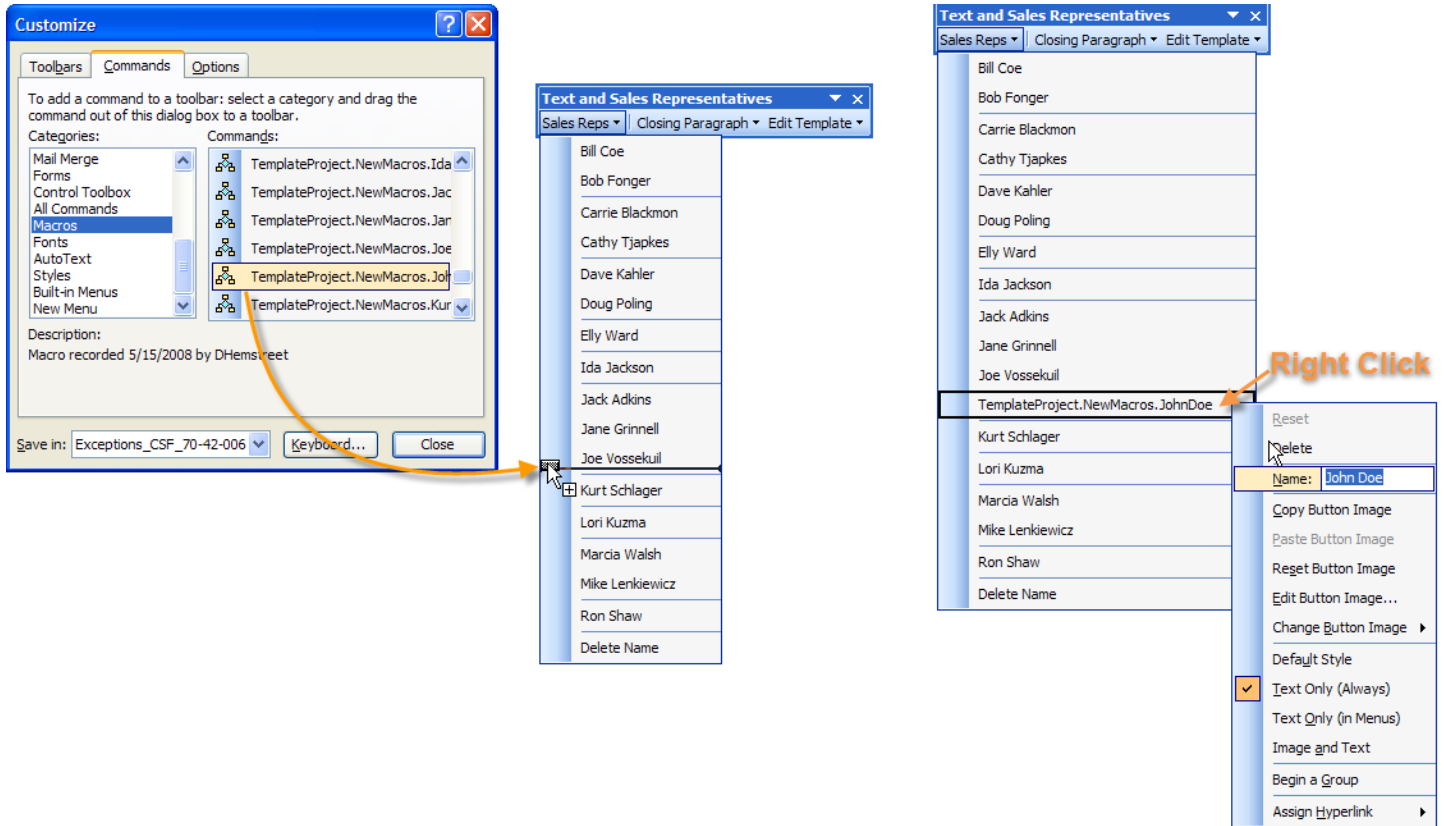


Figure 5. Customizing the Toolbar and Options

6.5 Edit the Drop-Down Text Fields

1. Open the source template as detailed in Section 6.1.
2. Right-click anywhere on a toolbar and open the Forms toolbar (Figure 6).
3. Double-click the form-field to be opened (either "**Select quote or order..**" or "**Select an Option**").
 The Drop-Down Form Field dialog box appears (Figure 7).

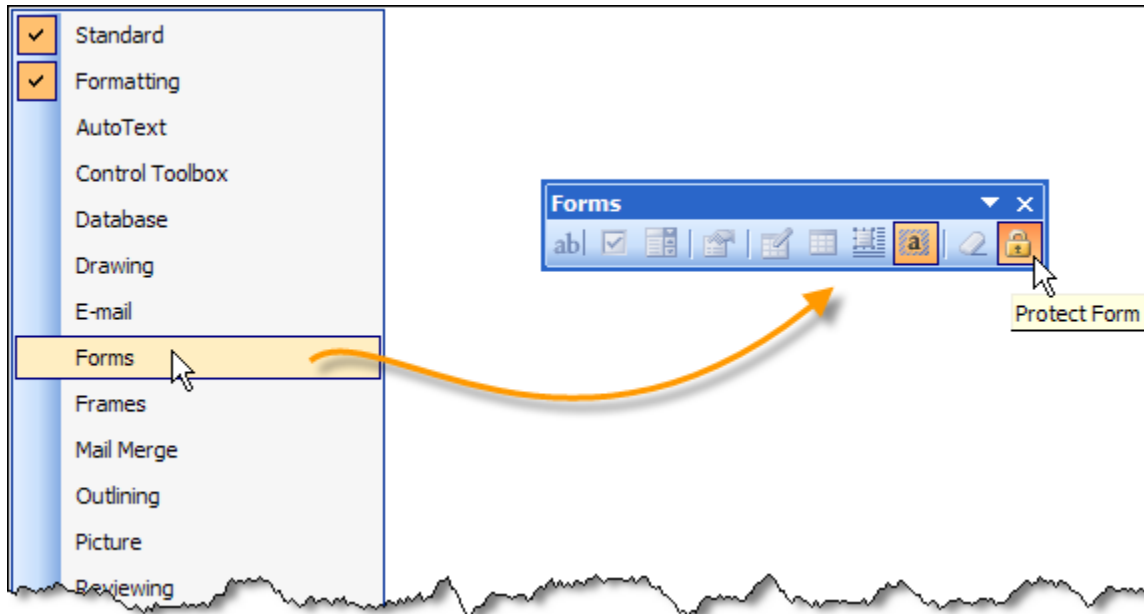


Figure 6. Unprotecting a Form

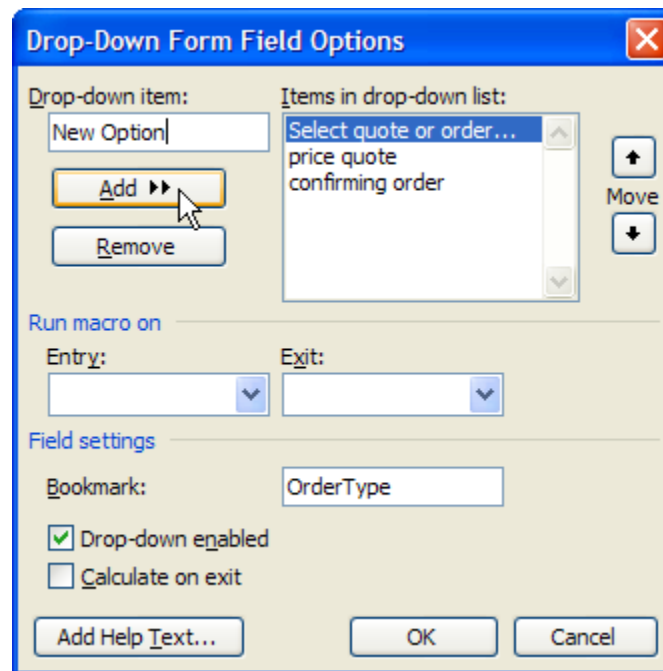



Figure 7. Adding/Editing Drop-Down Form Field Options

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4. To edit an option, proceed as follows:
 - a. In the Items in drop-down list panel, select the option to be edited.
 - b. Click **Remove**.
The option appears in the Drop-down item field.
 - c. Edit the option and click **Add**.
The revised option appears in the "Items in drop-down list" area.
 - d. Use the arrows to move the option up or down in the list.
 - e. Click **OK** when done.
5. To add a new option, proceed as follows:
 - a. In the Drop-down item field, enter the new option.
 - b. Click **Add**.
The new option appears in the "Items in drop-down list" area.
 - c. Use the arrows to move the option up or down in the list.
 - d. Click **OK** when done.
6. Save and close **Exceptions_CSF_70-42-006.dot**
7. Change the file attributes to Read Only (to prevent accidental permanent changes to the template).

6.6 Edit/Add Closing Paragraph Text

The closing paragraphs have been entered as AutoText entries in this template. Editing or adding AutoText entries involves the following main steps:

- Writing the AutoText entry.
 - Creating an AutoText entry
 - Copying the AutoText entry from the Normal.dot template to Exceptions_CSF_70-42-006.dot.
 - Adding the AutoText entry to the Text and Sales Representatives toolbar (new entries only).
1. Open the source template as detailed in Section 6.1.
 2. Go to the end of the document and write the new text, *exactly as you want it to appear* (see Figure 8).
 3. Select the text, including the paragraph mark, and press **<Alt+F3>** (Figure 8).
 - The Create AutoText dialog box appears.
 - The first few words of your text are assigned as the *name* of the entry.

4. Rename the AutoText entry and then click **OK**.

The AutoText Entry is saved in normal.dot template on your computer.

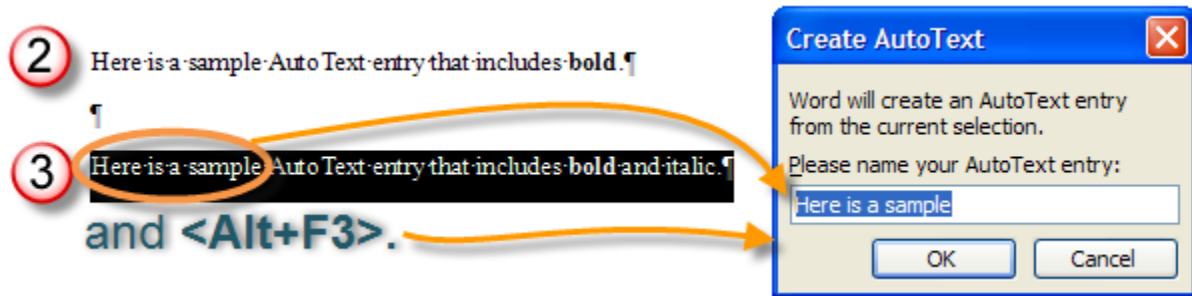


Figure 8. Creating/Editing an AutoText Entry

5. Save the AutoText entry to the Exceptions_CSF_70-42-006.dot template as follows:
 - a. On the Tools menu, click Templates and Add-ins.
The Templates and Add-ins dialog box appears (not shown).
 - b. At the bottom left of the Templates and Add-ins dialog box, click **Organizer**.
The Organizer dialog box appears (Figure 9).
 - c. In the Organizer dialog box, click the AutoText tab.
 - d. Verify that the correct templates are opened in the Organizer (yellow in Figure 9).
If not, click **Close File**. The button changes to Open File. Click **Open File**, navigate to the desired template and then click **Open**.
 - e. Select the desired AutoText entry in Normal.dot.
 - f. Click **Copy**.
The AutoText entry is copied to the desired template.
6. Close the Organizer.
7. Save and close **Exceptions_CSF_70-42-006.dot**
8. Change the file attributes to Read Only (to prevent accidental permanent changes to the template).

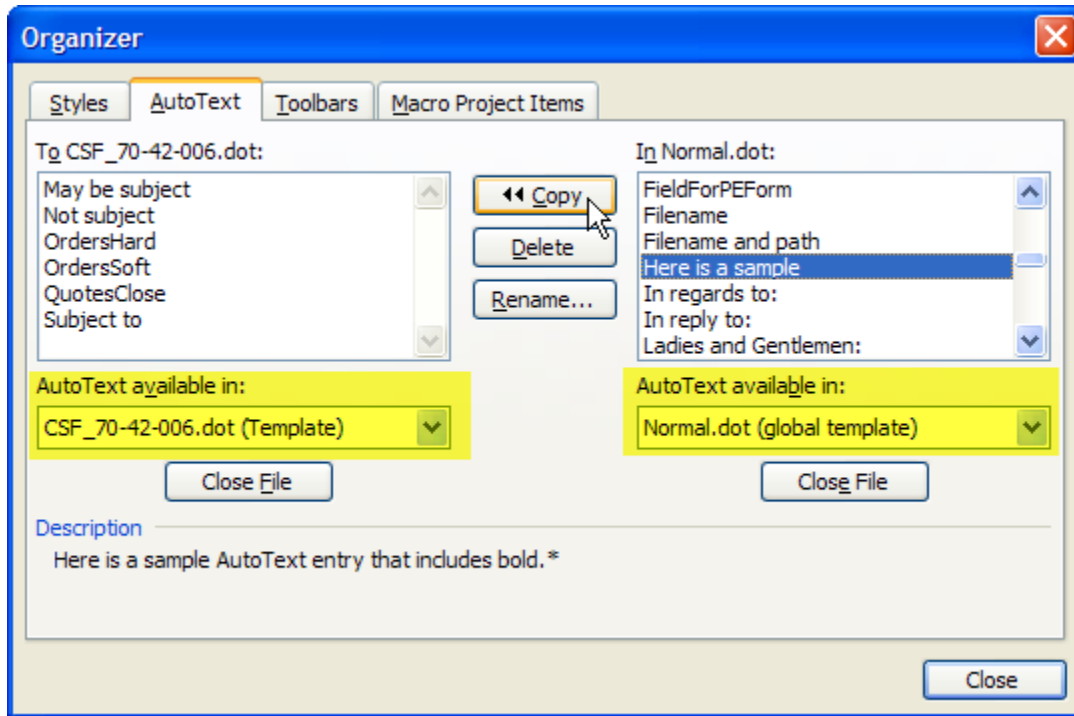


Figure 9. Copying AutoText From One Template to Another



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REVISION HISTORY

Revision	Description	Date
A	New Document	

APPROVAL MATRIX

	Name	Position	Signature	Date
Prepared by:	D. Hemstreet	Technical Writer Contractor		
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