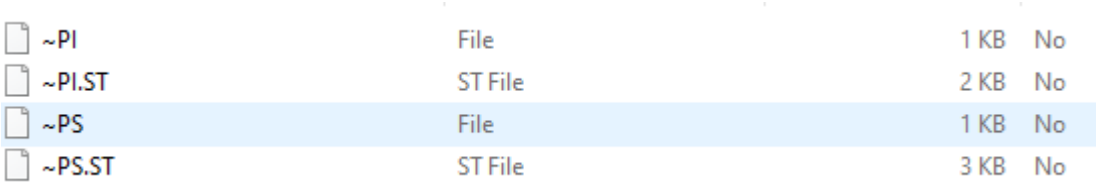
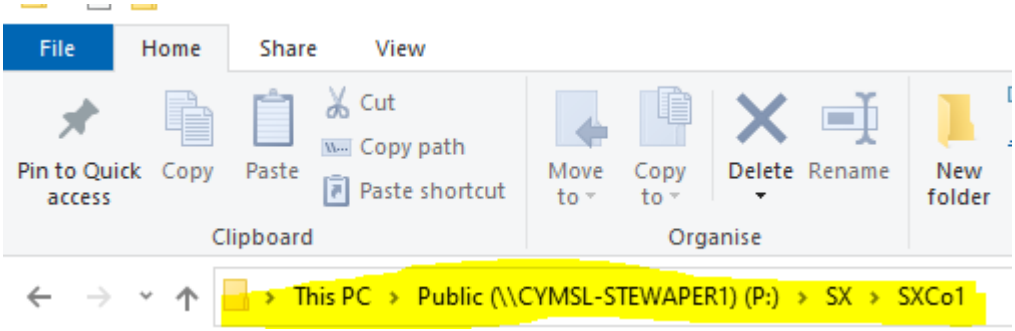
Polaris Reporting Installation Instructions

Downloading the reports

You can download the reports from our website (Insert link here). After you have downloaded the reports, they need placing in the company folder along with the macros. Usually this will be the SXCo1 folder. If you run a multi company setup of Platinum then you will need to copy these reports to the relevant folders (SXCo2 etc).

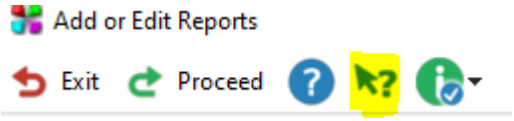


Typically SXCo1 can be found by opening up windows file explorer (Windows key + E) and paste in the file path location P:\SX\SXCo1 into the address bar at the top. If you use a different drive mapping for Platinum then please replace the “P:\” to your drive mapping.

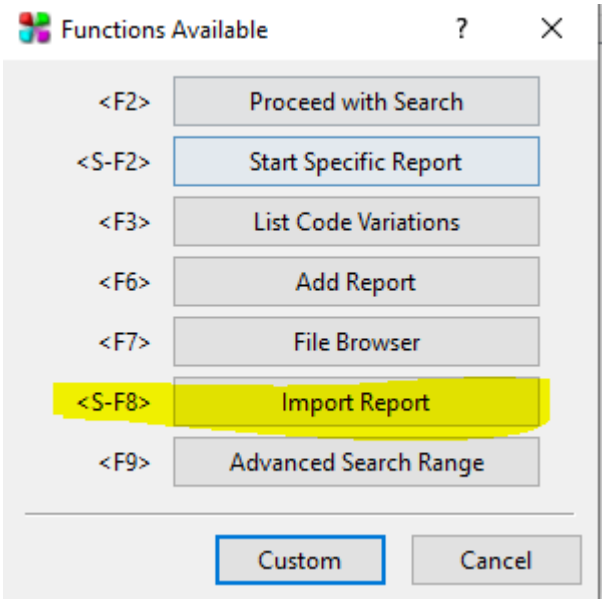


Importing the reports

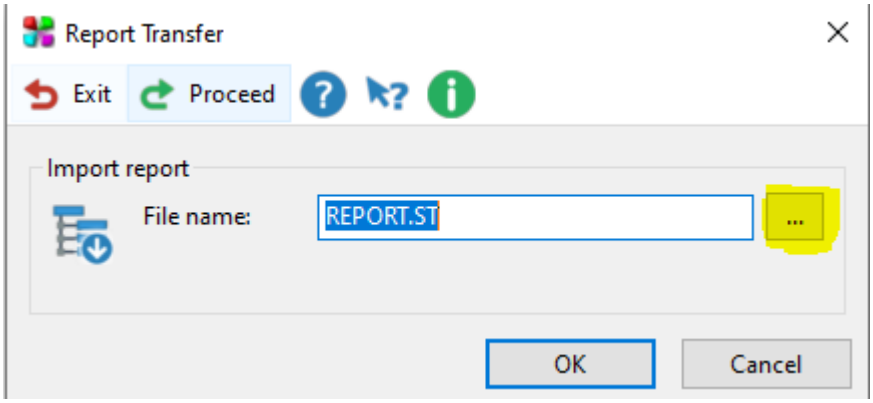
Once the reports have been copied to the SXCo1 folder then you are now ready to import them into Platinum. Sign into Platinum and head to *Systems* > *Stock Control* > *Stock Reports* > *Stock Reports Generator*.
Click on the functions button which is highlighted below.



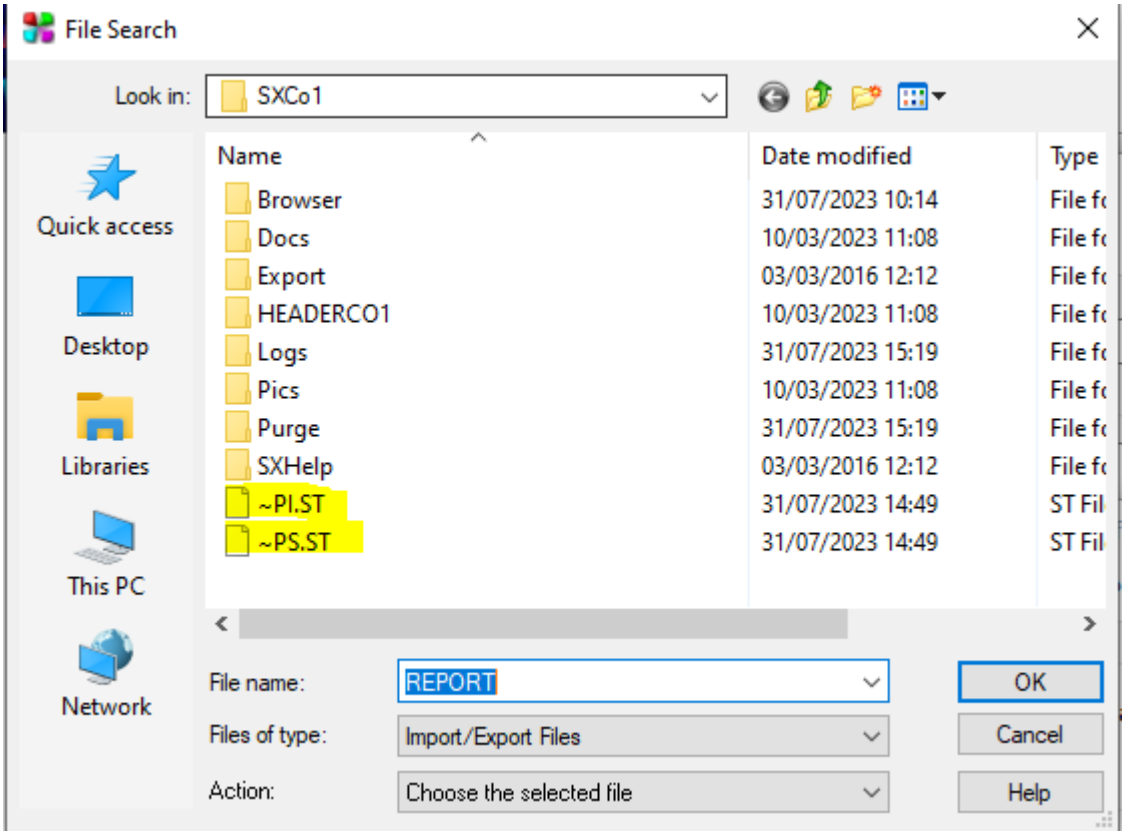
Select “Import Report”



Once that has been selected click on the "…"



This will open up Windows File Explorer, you should see your copied reports of ~PI.ST and ~PS.ST.

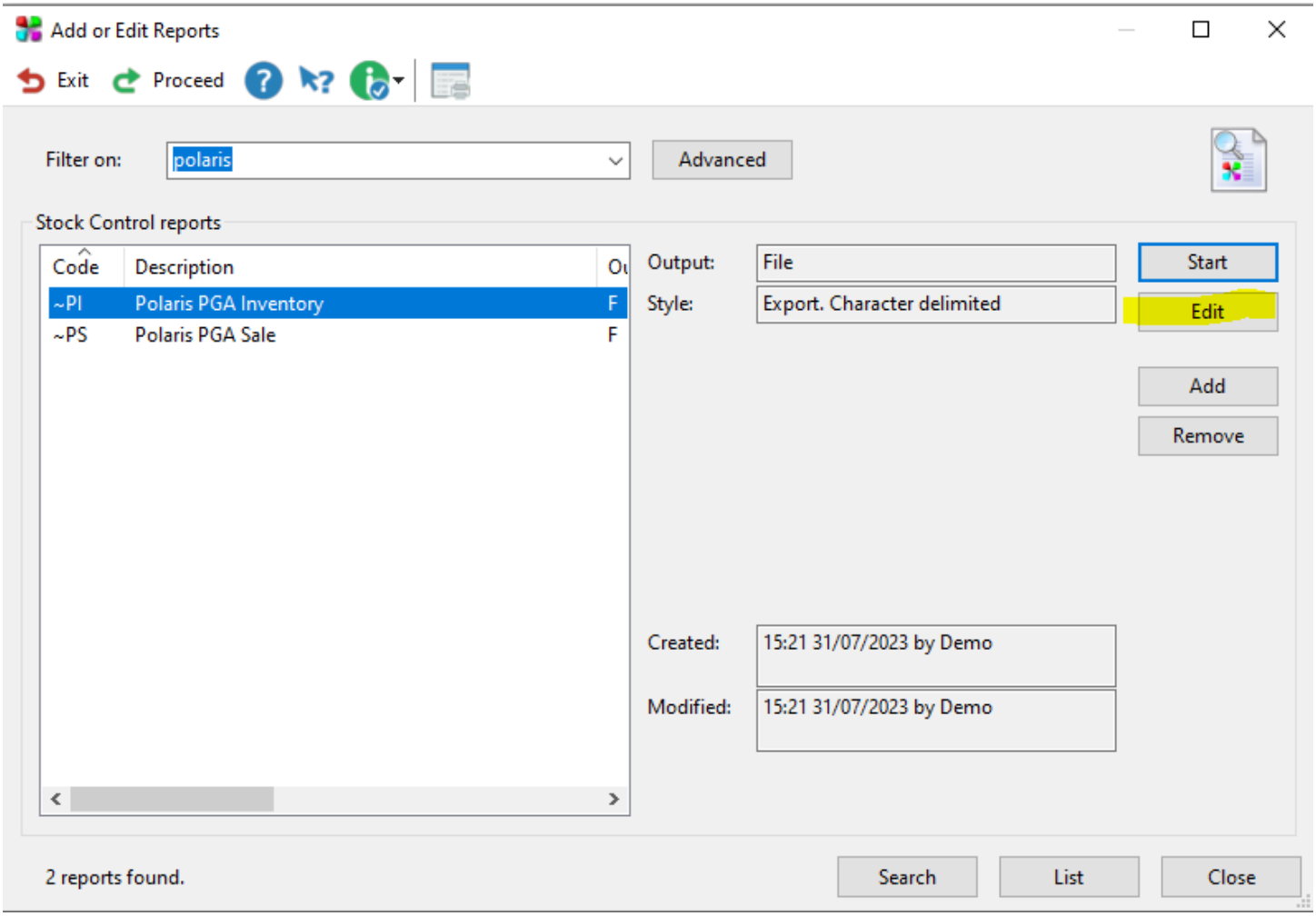


Simply double click on PI.ST and repeat the above process for PS.ST.

Configuring the reports

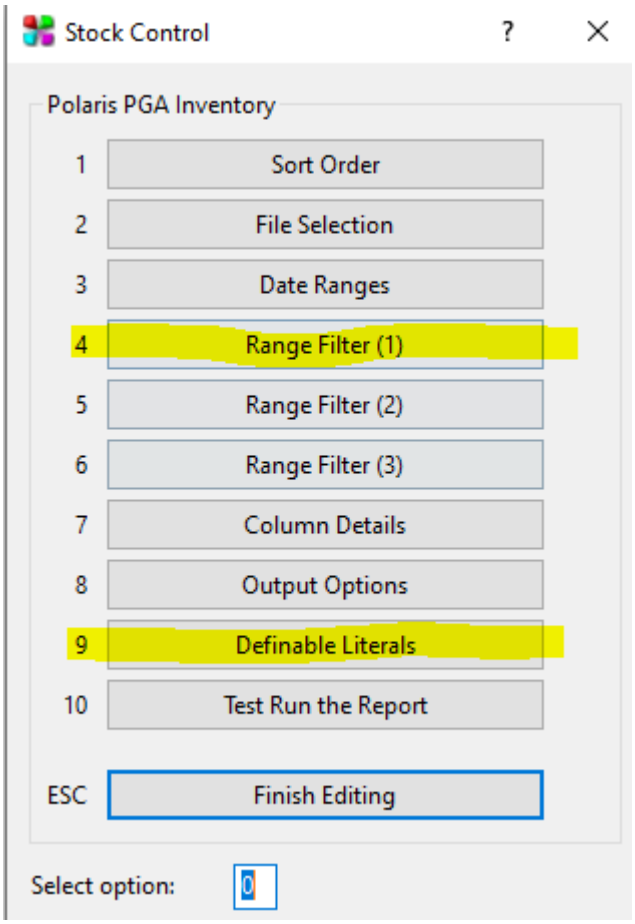
Once the reports have been imported you will need to amend them to match your company details with Polaris. This process will need completing for both reports of “~PI” and “~PS”.

Find the reports in the Stock Report Generator. Highlight the report and click on edit.



Click on Range Filter (1) and “POL001” account code is already filled in. If this is not your Purchase Ledger account for Polaris, then please either change this to the account code you hold for them or create it. Once you have amended the screen press “ESC” on your keyboard to exit the Range Filter (1) screen.

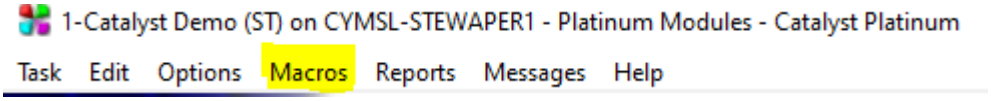
After you have completed that, head to the “Definable Literals” button.
There are 3 fields that you need to update.
“ACCNUM” needs to be overwritten with your Polaris account number.
“DEACDE” needs to be overwritten with your Polaris dealer code
“GB” needs to be overwritten with your country code. In most instances this won’t need touching.



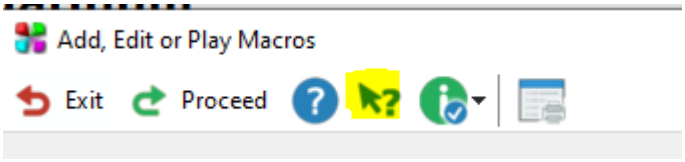
After you have completed the definable literals, press “ESC” and “Finish Editing”. Press “Accept” to save your changes made. This process will also need to be repeated for the second report.

Importing the macro

Within the download you should also receive two macros called ~PI and ~PS. Login to Platinum and head over to macros at the very top of the screen and then click no “Macro Manager”



Press the functions button (F12) or the blue mouse arrow/question mark.



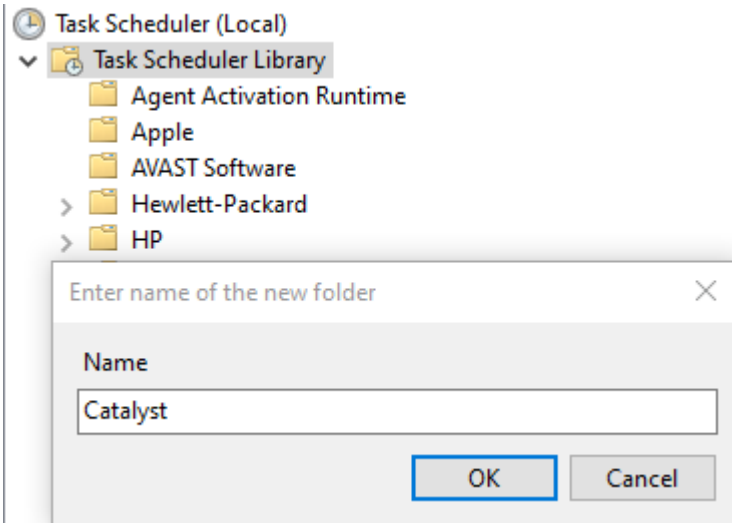
Select “Import” and then click on the three dots to open Windows file explorer. From here find where you have saved the macros to and select ~PI. Repeat the process and click on ~PS this time.

Setting up the Windows Task Scheduler

This process will need to be completed on a PC that has a Platinum terminal licence and will be switched on at the time specified on the scheduled task.

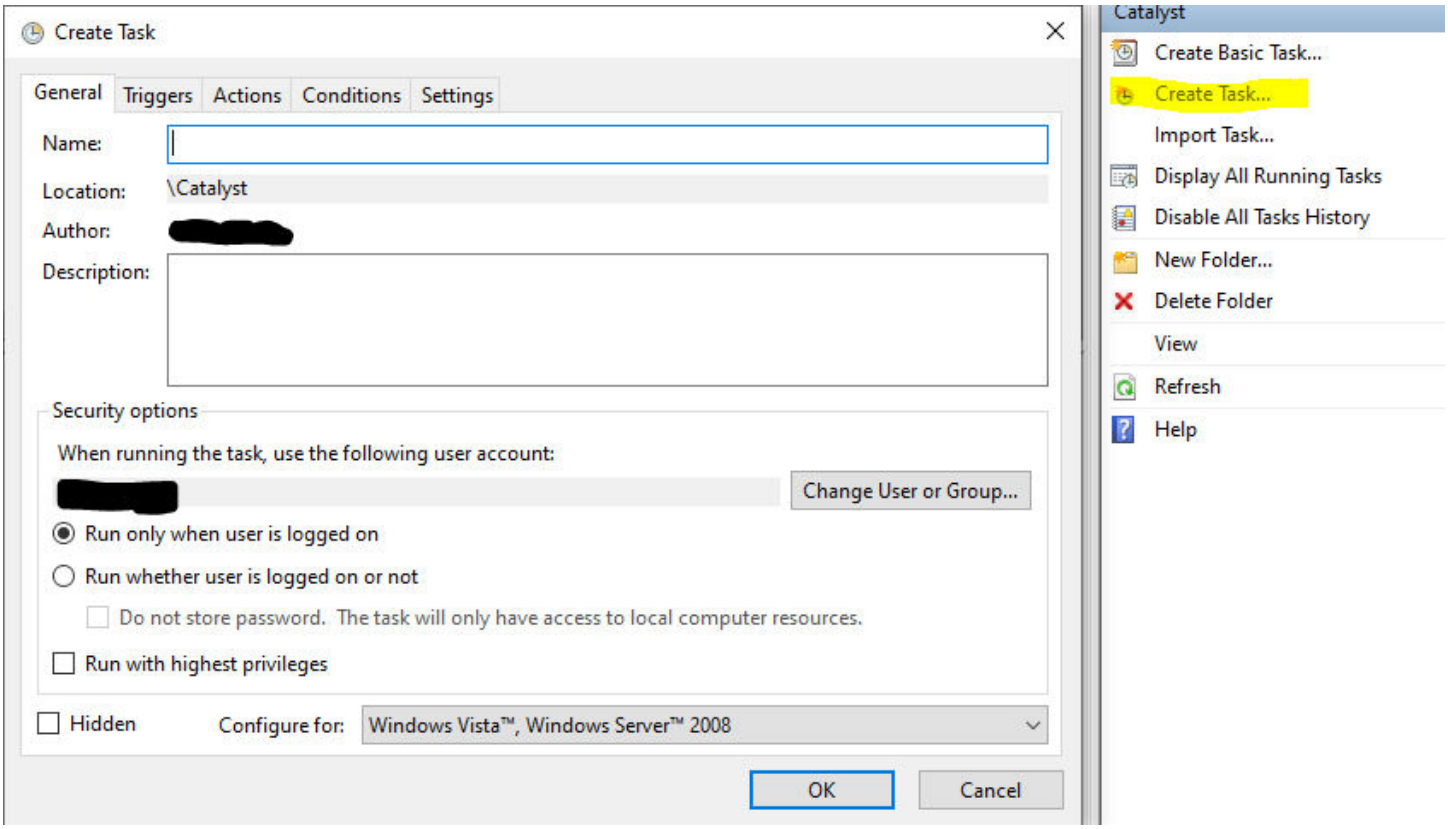
Open the task scheduler service by pressing on the windows key on your keyboard, afterwards type “Task Scheduler” and click on the icon.

Right click on “Task Scheduler Library” and select “New folder…” and name it Catalyst.

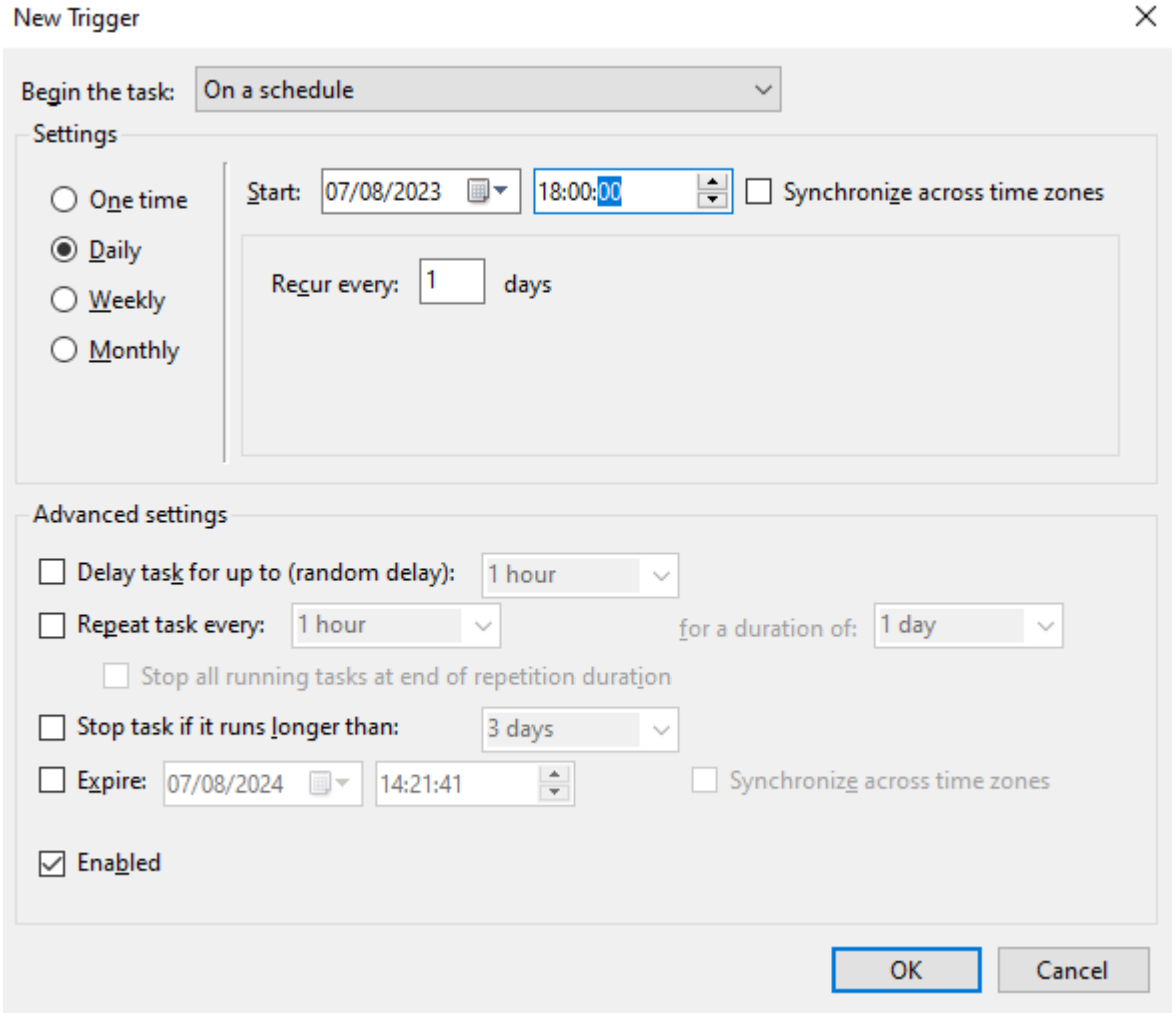


Click onto that newly created folder and on the right-hand side select “Create Task”.
You will need to create two scheduled tasks, one for each report.

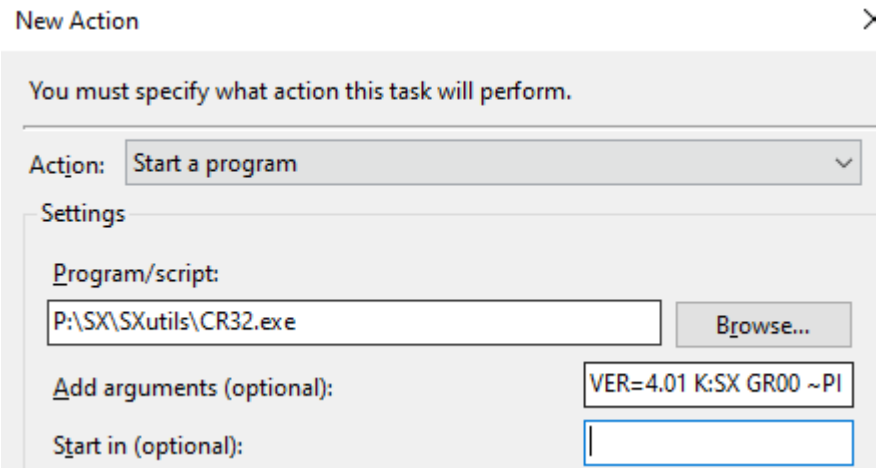
Call the first task “PGA Inventory Upload”
Call the second task “PGA Sale Upload”


Create Task
General
Triggers
Actions
Conditions
Settings
Name:
Location:
\Catalyst
Author:
Description:
Security options
When running the task, use the following user account:
Change User or Group...
Run only when user is logged on
Run whether user is logged on or not
Do not store password. The task will only have access to local computer resources.
Run with highest privileges
Hidden
Configure for:
Windows Vista™, Windows Server™ 2008
OK
Cancel
Catalyst
Create Basic Task...
Create Task...
Import Task...
Display All Running Tasks
Disable All Tasks History
New Folder...
Delete Folder
View
Refresh
Help

Click on “Triggers” at the very top and then click on “New” to set a new trigger point for this to activate. Select “Daily” on the settings and a time of 18:00. Then click “Ok” once you have input those options.



Click on “Actions” at the very top and then click “New” to implement a new action.
Under Program/Script paste ***P:\SX\SXutils\CR32.exe*** and in the arguments paste in ***SXCO=1 SXVER=4.01 K:SX GR00 ~PI***



Now create a secondary task called “PGA Sale Upload” with the same trigger point.
The program/script remains the same of ***P:\SX\SXutils\CR32.exe*** and the argument is ***SXCO=1 SXVER=4.01 K:SX GR00 ~PS***