



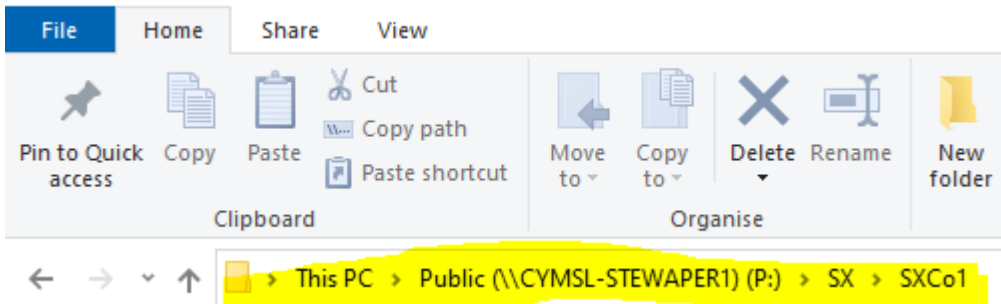
Polaris Reporting Installation Instructions

Downloading the reports

You can download the reports from our website on the wiki page. 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).

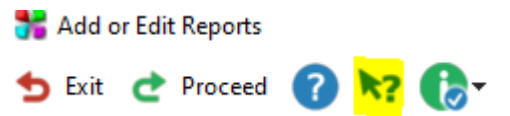
~PI	File	1 KB	No
~PI.ST	ST File	2 KB	No
~PS	File	1 KB	No
~PS.ST	ST File	3 KB	No

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.

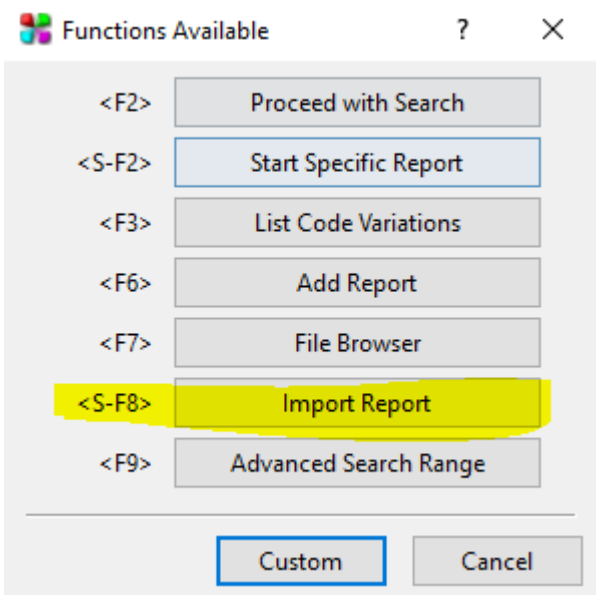


Importing the reports

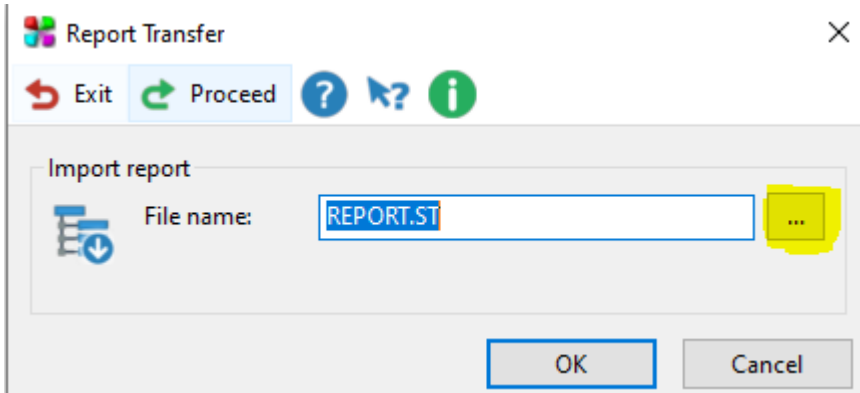
Once the reports have been copied to the SXCo1 folder then you are now ready to import them into Platinum. Sign into Platinum and head to *Systems > Stock Control > Stock Reports > Stock Reports Generator*. Click on the functions button which is highlighted below.



Select “Import Report”

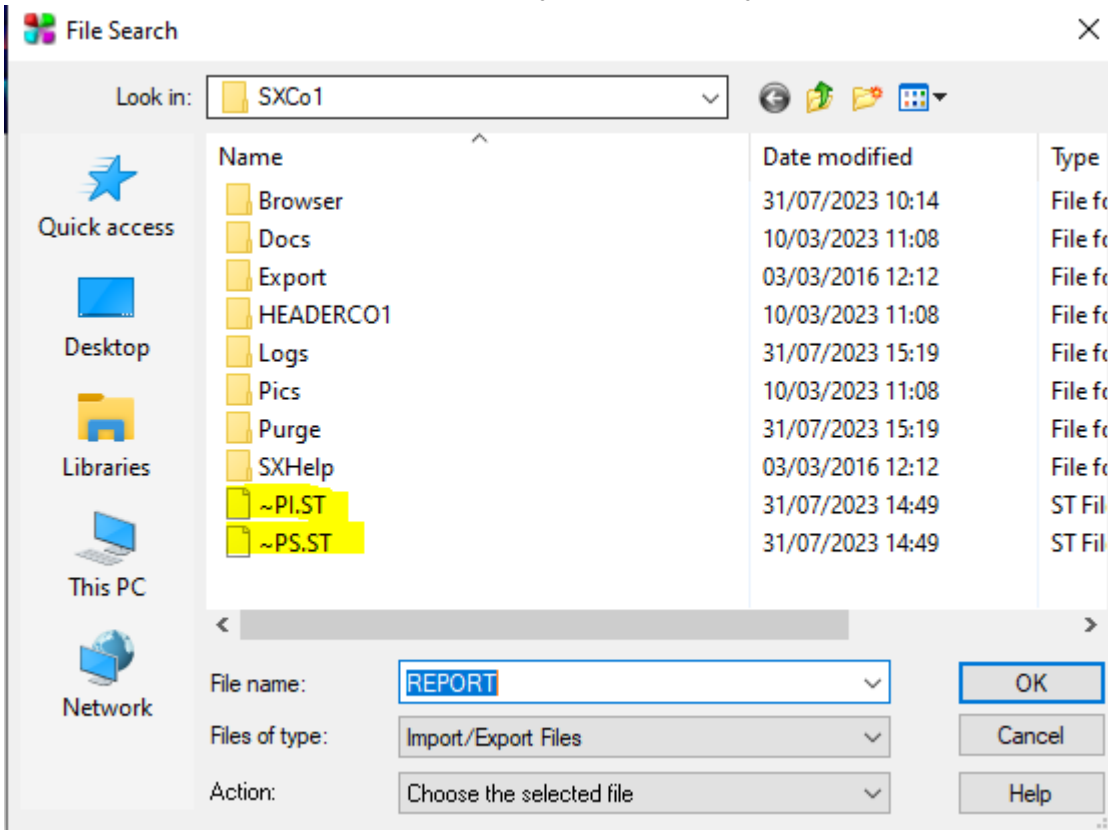


Once that has been selected click on the “...”





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.

Filter on: Advanced

Stock Control reports

Code	Description	Output
~PI	Polaris PGA Inventory	F
~PS	Polaris PGA Sale	F

Output: Start

Style: Edit

Add

Remove

Created:

Modified:

2 reports found. Search List Close

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.

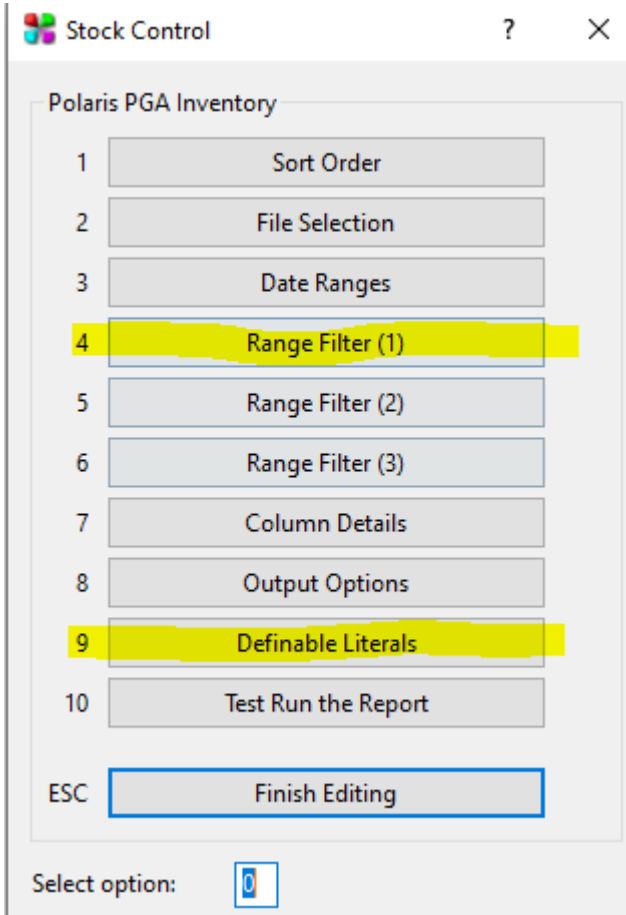
After you have completed that, head to the “Definable Literals” button.

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 on “Macro Manager”

1-Catalyst Demo (ST) on CYMSL-STEWAPER1 - Platinum Modules - Catalyst Platinum

Task Edit Options **Macros** Reports Messages Help

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

Add, Edit or Play Macros

Exit Proceed ? ? ? ? ? ? ? ?



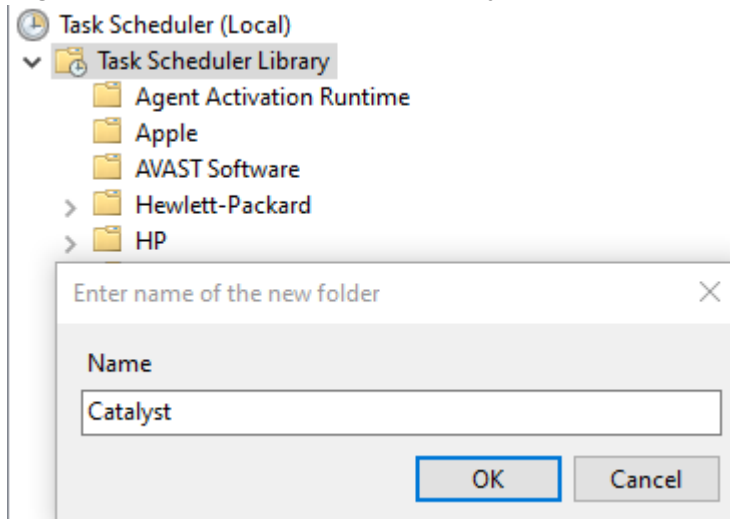
Select “Import” and then click on the three dots to open Windows file explorer. From here find where you have saved the macros to and select ~PI. Repeat the process and click on ~PS this time.

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:
██████████

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

- 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.

New Trigger ✕

Begin the task: On a schedule

Settings

One time
 Daily
 Weekly
 Monthly

Start: 07/08/2023 18:00:00 Synchronize across time zones

Recur every: 1 days

Advanced settings

Delay task for up to (random delay): 1 hour

Repeat task every: 1 hour for a duration of: 1 day
 Stop all running tasks at end of repetition duration

Stop task if it runs longer than: 3 days

Expire: 07/08/2024 14:21:41 Synchronize across time zones

Enabled

OK Cancel

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**



New Action



You must specify what action this task will perform.

Action: Start a program

Settings

Program/script:
P:\SX\SXutils\CR32.exe

Add arguments (optional): VER=4.01 K:SX GR00 ~PI

Start in (optional):

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**