# POLARS COMMERCIAL WAREHOUSING

# **CLIENT PORTAL** A QUICK REFERENCE GUIDE



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# Welcome to PCW's Client Portal

#### Access to the Client Portal

To login to the Client Portal, please go to <u>www.polaristransport.infopluswms.com</u>. Your login credentials for access are as follows:

USERNAME:	
PASSWORD:	

Please keep this information safe and <u>contact us</u> if you any issues logging in. Once logged in, you will be shown your **Dashboard**.

#### Dashboard

The dashboard is the homepage created for your line of business to show you information which is most relevant to you. The **Dashboard** is split into several sections:

- Alerts This section uses **Triggers** to provide **Alerts** specified by you. For example, we can have an alert set to send an email when inventory levels for specific items drop below a specified threshold.
- **Recent Applications** shows applications recently used.
- Favorite Applications Provides shortcuts to access relevant applications.
- **Favorite Records** this is where any specific record that is flagged will show so that you're able to keep a close eye on it.
- **Metrics** We have customized this section to show you a live overview of your business along with daily metrics with Polaris Commercial Warehousing.
- **Favorite Smart Filters** These link to **Tables** with filtered views so you're presented with data that is important to you.
- **Favorite User Reports** Here you can see live reports based on parameters we have set. These reports can also be accessed from the Metrics section.

#### **Metrics**

The Metrics section is created specifically for your business and intended to provide you with an overview and links to all the *live* information you require.



Figure 1a - Metrics Section of the Dashboard

Information here will be shown on both the single value tiles and table format tiles. Some of these single value tiles and table format tiles show the same information, in a different form. Further information is provided below under subheadings Single Value Tiles and Table Format Tiles.

#### Wallboard

The <u>Wallboard</u> is a feature we're excited about. It provides a display view of the **Metrics** section. To access the Wallboard, select <u>View Wallboard</u> on the top-right of the **Metrics** section of the **Dashboard** (please see Figure 1a above). Figure 1b to the right shows what the Wallboard will look like. This view will adjust itself based on your screen size.

To Exit from the Wallboard, simply move your mouse, and the blue bar on the top will appear. Simply click on the button on the top left to bring back to the **Dashboard**.



Figure 1b - Wallboard View can be customized to show desired information in a specified order.

#### Single Value Tiles

The single value tiles display data obtained from a specified **Table** with an applied *Smart Filter*. Clicking on the <u>Name</u> of the single value tile from the **Metrics** section of the **Dashboard** or from the **Wallboard** will direct you to the **Table** with the applied *Smart Filter*.

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Conta	ins text	Q Order	r No 🔻	Warehouse	e Service Type 🔻	Status 🔻	Fulfillability  SKI	J▼ LOB▼	* Create Time *	* Create Date *
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Figure 1c - Selecting a Single Value Tile will redirect you to its Table with the applied Smart Filter.

Clicking on any of the Table's *Fields* will the sort data by the selected *Field*. The table in Figure 1c has been sorted by Order No in Descending Order as indicated by the downward facing triangle next to the field.

#### **Table Format Tiles**

The table format tiles display data obtained from a specified **Report**. These pivot reports are created using data from **Tables** with a specified **Smart Filter**. Clicking on the <u>Name</u> of the table format tile from the **Metrics** section of the **Dashboard** or from the **Wallboard** will direct you to the **Report** being displayed.

Showing 1-20 of 266 results	Inventory Report (Confirmation)			
				> Actions
SKU	Item Description	Unit Description	Sum of Current Quantity	
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		Bg	ă.	
	······································	То	7	
		То	15	
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Figure 1d - Selecting Table Format Tile name will direct you to its Report, showing all values not viewable in the Tile format.

If needed, each report can also be exported into Excel or PDF format, from the Actions menu.

## Bulk Load for Receiving via CSV Files

#### Step 1: Go to Quick Receipt

From the home page, select <u>Receiving</u> from *Favorite Applications*, then select <u>Quick Receipt</u> from *Tables*:

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	Dashboard		Appa Receiving		
Dashboard	Welcome, 👘 💿	ι	★ Receiving		
	Alerts		Tables		
Insights	Alerts let you keep up on status and potential problems in real-time.		Item Receipt	uick Receipt	Receiving Process
80	Use the gear icon on the right to set up and display your chosen alerts right here on your customized dashboard. Details		Receiving Worksheet	Vendor Compliance Survey	
Apps	Favorite Applications		Processes		
			Cancel Receiving Process	Close Item Receipt	Close Receiving Worksheet
Reports			Commit Item Receipt	Execute Quick Receipt	Print Receiving Worksheet
Mobile Floor Apps	Investory Order Receiving Management Management		Reopen Receiving Worksheet	Uncommit Item Receipt	Unreceive Item Receipt

Figure 2a - Select Receiving from Favorite Applications

Figure 2b - Once in Receiving, select Quick Receipt

Alternatively, the period key "." will bring up the *Quick Actions* menu – entering "Quick Receipt" here will bring up the table to be selected.

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	Distribute			
Dashboard	Welcome, State &			
æ	Alerts	Quick Actions ×	View All Alerts	Recent Applications
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Apps		quick Tables		Crder Management
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Reports		Processes Execute Quick Adjustment Execute Quick Receipt		Favorite Records
Mobile Floor	Inventory Order Receiving Management Management			
ASSIS.	Metrics			When viewing any record in Intoplus, click the star icon to the left of the record and it will show up right here on your customized dashboard

Figure 2c - Press the . key on the keyboard to bring up Quick Actions, where you can navigate to tables quickly

#### **Quick Receipt Table**

The **Quick Receipt Table** will show you all the items we have received in our system so far, sorted in descending order for *Create Date*. There are several columns you can select, filter, and sort by to provide desired views with relevant information. Each "view" can be saved as a <u>Smart Filter</u> for easier viewing.

#### Step 2: Select Bulk Load

From the Quick Receipt Table, select Actions (located near the top right), then select Bulk Load.

POLA	IR IS						Q Quick Search		2
	Apps Receiving Quick F	Receipt							
Receipt +	Contains text	ld 🔻	Warehouse 🔻	LOB 🔹 SKU 🔻	Status V Carrier V	Product Id Tag 🔻	Create Date 🔻 🗹	Bulk Load	Actions     Create New
Quick	☐ Id ▼ Create Date	Warehouse	LOB SKU	Location	Quantity Status	Unit Description	Unit Weight (Ibs) Production Lot	Product Id Tag Expiration Dat Bulk Add Tags	

Figure 3a - Select Actions, then select Bulk Load.

This will open the **Quick Receipt Bulk Load (Upload)** page. You can drag and drop your file into the dotted box or click on the icon to select your file from the Windows Explorer. Once the file is selected and loaded,

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Figure 3b - Select your file to be uploaded.

*Figure 3c - Confirm correct file was uploaded and hit Next.* 

it will display a blue box below the dotted box with the uploaded file name. Hit Next.

#### Step 3: Select Saved Profile

The next screen is to apply each column from the Excel Worksheet to a field for receiving in the Client Portal. To make this process seamless, we have added a profile which will automatically make the required selections for you. Select the designated profile, scroll to the bottom of the page and hit Next.

Quick Rece	ipt Bulk Load (Fields)	Upload Fields Values Review Confirm	
Note the Saved Profile in upcoming steps.	es drop-down menu where you can select from a previous	Saved Profile. You may save the mapping you are currently developing Obfsult Value Costomer Po Number Obfsult Value	×  Map Values Preview Values
For each field, choose required fields popula	e if the Value should come from a Column in your File, or ted for the "Next" button to be activated.	you prefer to use a Default Value. Each selection must be unique and all Optional Fields	
If you are using a Column	umn in your file, you may choose to Map Values. If select	the next screen will let you specify how Values in your file should be Field Value	
Required Fields	noprus. Details	Saved Profiles	x v Map Values
Field	Value	Manage Profiles   X Expiration Date   Column From File  Expiry Date (MM/DD/YYYY)  Column File  Expiry Date (MM/DD/YYY)  Column File  Expiry Date (MM/DD/YY)  Column File  Expiry Date (MM/	x Values
		Clear Current Profile	
Warehouse	O Column From File	Saved Profiles Add Optional Field	
	Default Value     205 Bethridge	x v Initial Inventory Upload2	Cancel Next

Figure 4a - The Saved Profile name will differ from the one displayed here.

Figure 4b -	Once	profile	is se	lected,	hit	Next.
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#### Step 4: Review Submission

Before finalizing the Bulk Load, the Client Portal will provide a summary of the data it pulled from the Excel Worksheet in the Review Screen.

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		<b>4</b> Rows had no errors and	will be processed		Rows received warnin	0 gs but will be pr	ocessed		0 Rows received errors and will not be	processed	
All (4)	C	OK (4) Warning (0)	Error (0)							> Actions •	
w	Id	Warehouse	LOB	SKU	Quantity	Status	Create Date	Results			
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		205 Bethridge			4	Open	-	•	This Quick Receipt will be inserted.		
						0		0	This Outsit Resident will be invested		

Figure 5a - Summary of data captured, while showing any potential warnings or errors.

#### Handling Errors

When there are errors, the review screen will provide information with which row from the Excel Worksheet the Client Portal had errors with. It will also let you know what the issue is.

	Upload Fields	
0 Id warnings but will be processed	1 Row received errors and will <b>not</b> be processed	
tity Status Create Date	Action te Results	118 •
	0	
Open -	<ul> <li>This Quick Receipt will be inserted.</li> </ul>	
Open – Open –	<ul> <li>This Quick Receipt will be inserted.</li> <li>This Quick Receipt will be inserted.</li> </ul>	
Open – Open – – –	This Quick Receipt will be inserted.     This Quick Receipt will be inserted.     With the inserted.     Withown SKU provided	
6	O ed warnings but will be processed ntły Status Create Da	Uptional Fields 0 1 ed warnings but will be processed Row received errors and will not be processed * Action

Figure 5b - The Results column will show you the reason for the error.

The best practice for errors would be to fix the error in the Excel Worksheet, hit Cancel and repeat Steps 1 to 4 to avoid accidentally receiving items multiple times. Please <u>contact us</u> if you have any issues.

## Appendix

#### **Contact Information**

If you have any issues or need further clarification for using the Client Portal, please feel free to contact our customer service department at <u>customerservice@commercialwarehousing.ca</u>.

#### **EDI and API Specifications**

If you would like to submit your documents to us via Electronic Data Interchange (EDI) or Application Programming Interface (API), please refer to the <u>PCW EDI and API Specifications</u> document by clicking the link <u>here</u>.

#### Disclaimer

Please do not share your username or password with any unauthorized parties. Your company is responsible for managing and protecting any access passed on to the end users. Polaris Commercial Warehousing does not take any accountability for any data loss and privacy protection outside of our database.