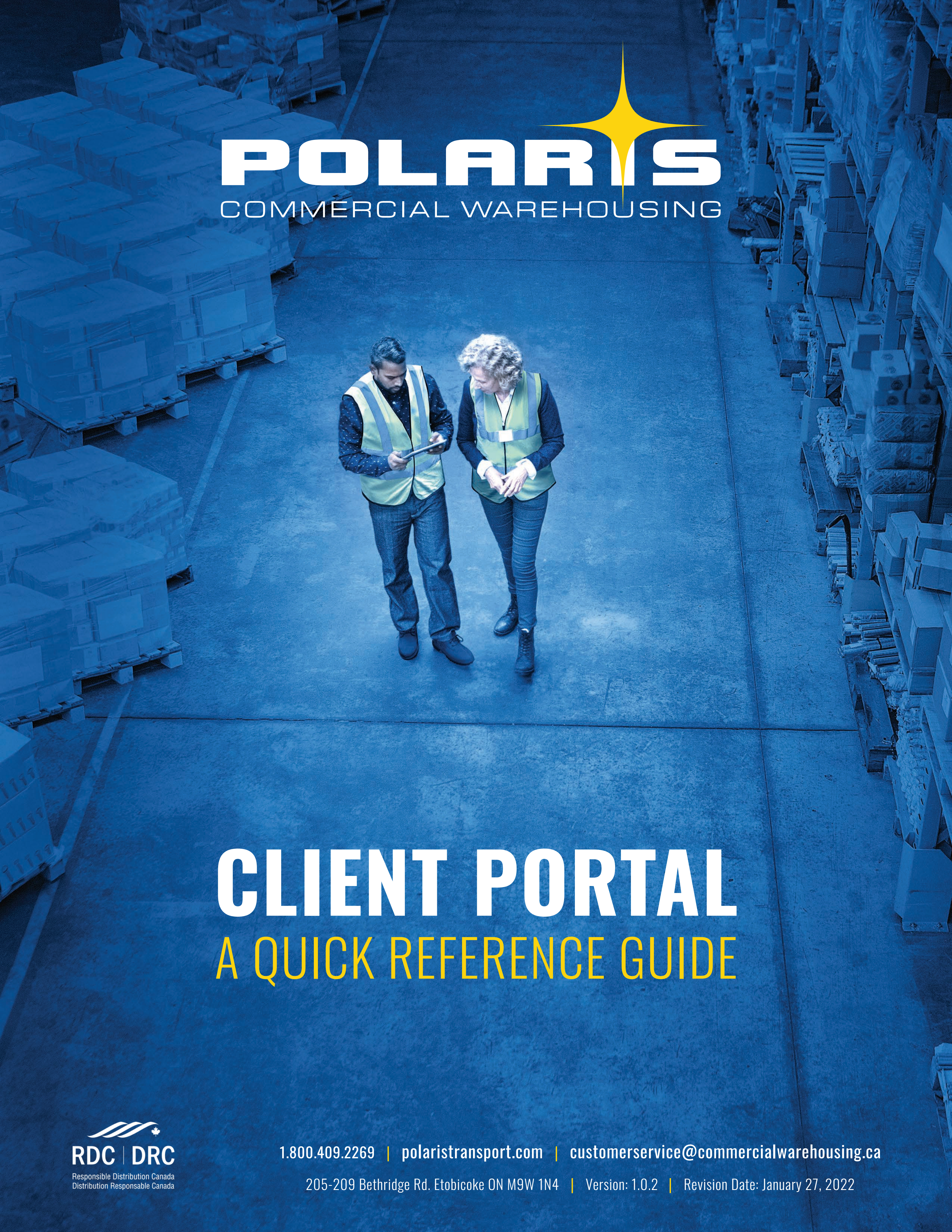

POLARIS
COMMERCIAL WAREHOUSING

CLIENT PORTAL

A QUICK REFERENCE GUIDE

RDC | DRC
Responsible Distribution Canada
Distribution Responsable Canada

1.800.409.2269 | polaristransport.com | customerservice@commercialwarehousing.ca

205-209 Bethridge Rd. Etobicoke ON M9W 1N4 | Version: 1.0.2 | Revision Date: January 27, 2022

Table of Contents

Welcome to PCW's Client Portal

Access to the Client Portal

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

USERNAME:

PASSWORD:

Please keep this information safe and contact us 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.

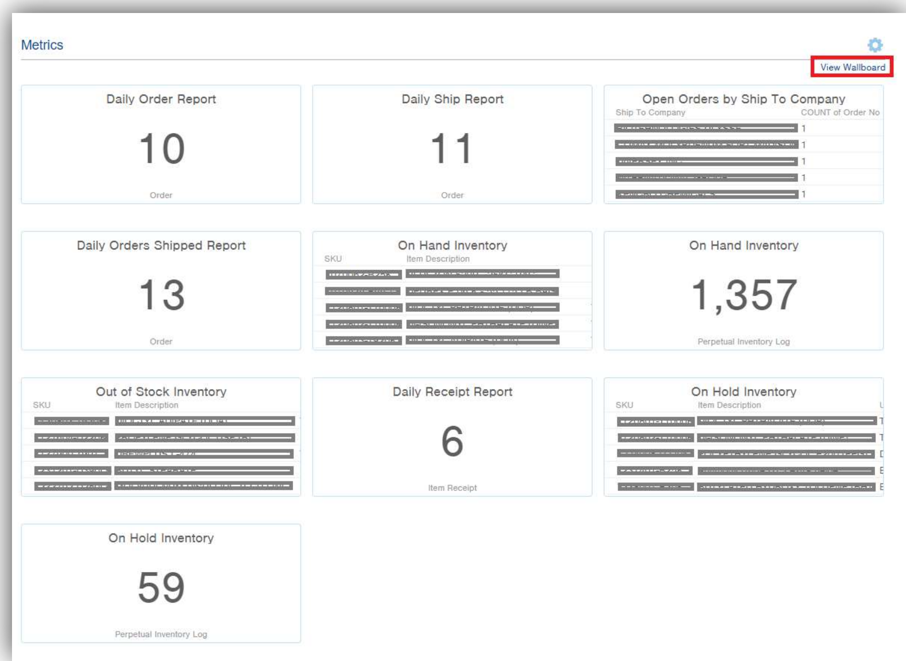

Figure 1a - Metrics Section of the Dashboard

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 Wallboard is a feature we're excited about. It provides a display view of the **Metrics** section. To access the Wallboard, select View Wallboard 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**.

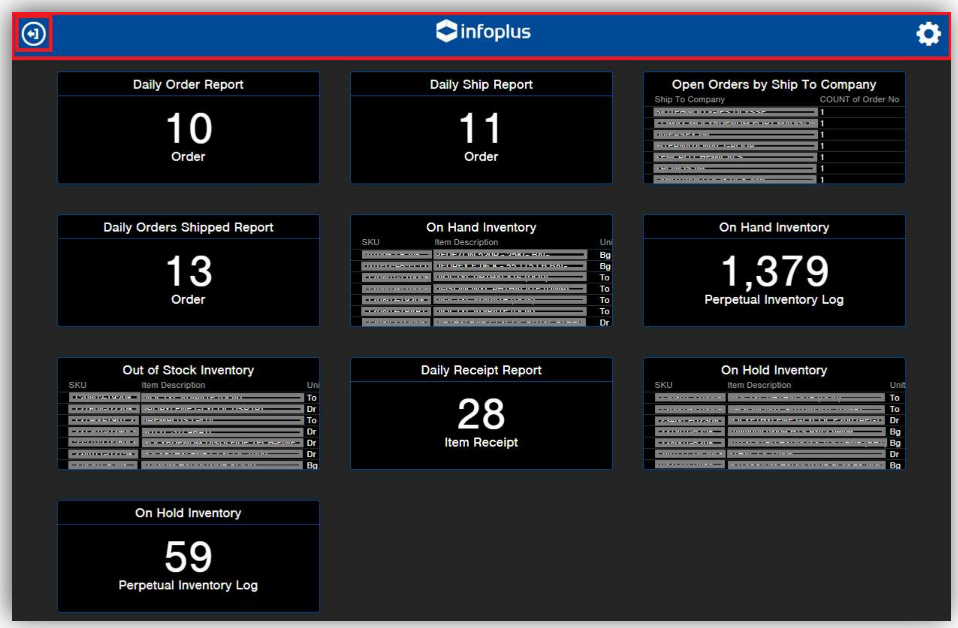

Figure 1b - Wallboard View can be customized to show desired information in a specified order.

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*.

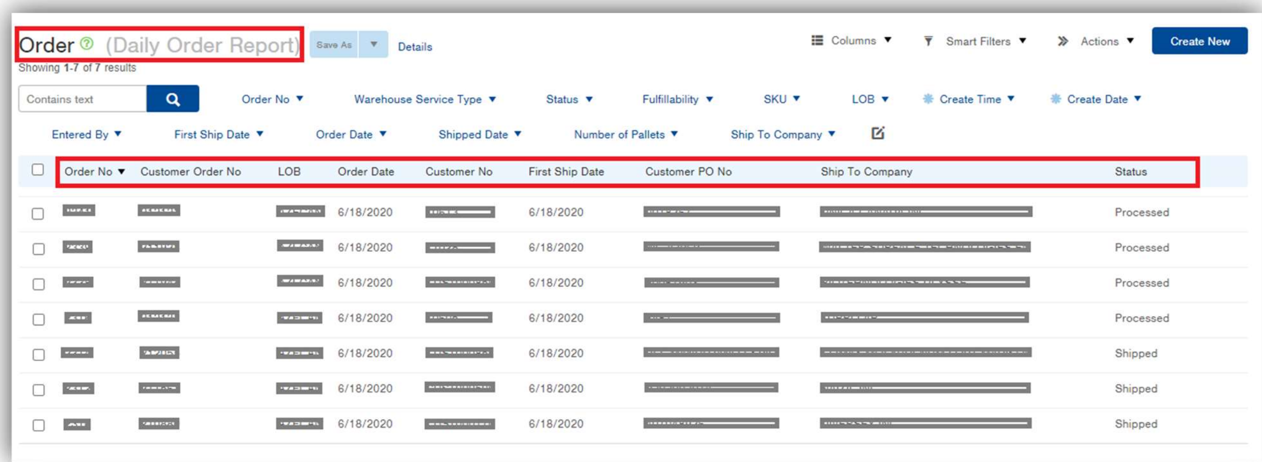

Figure 1c - Selecting a Single Value Tile will redirect you to its Table with the applied Smart Filter.

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.

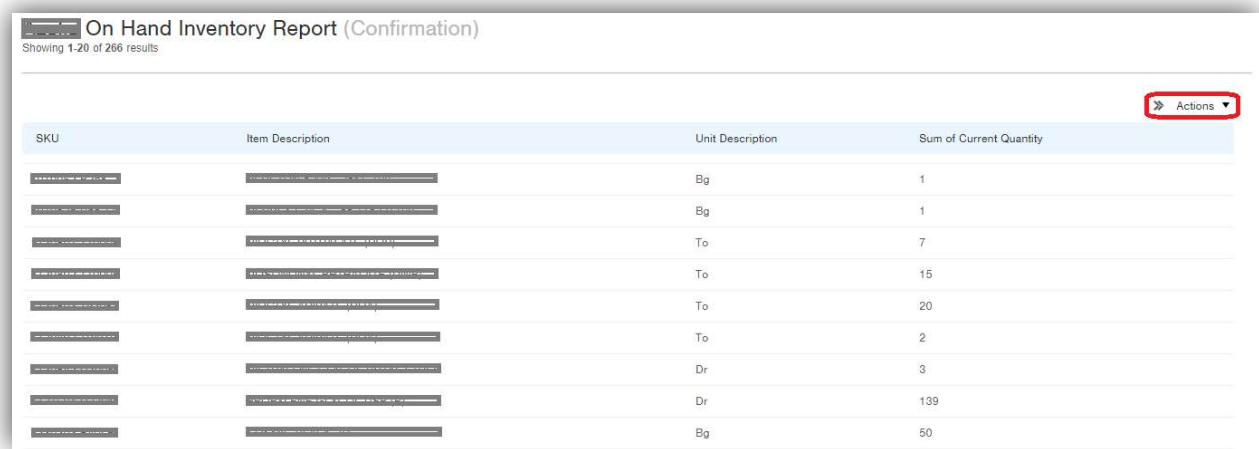

Figure 1d - Selecting Table Format Tile name will direct you to its Report, showing all values not viewable in the Tile format.

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

Bulk Load for Receiving via CSV Files

Step 1: Go to Quick Receipt

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

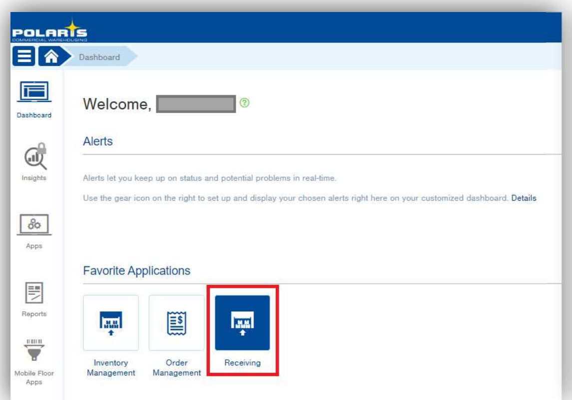

Figure 2a - Select Receiving from Favorite Applications

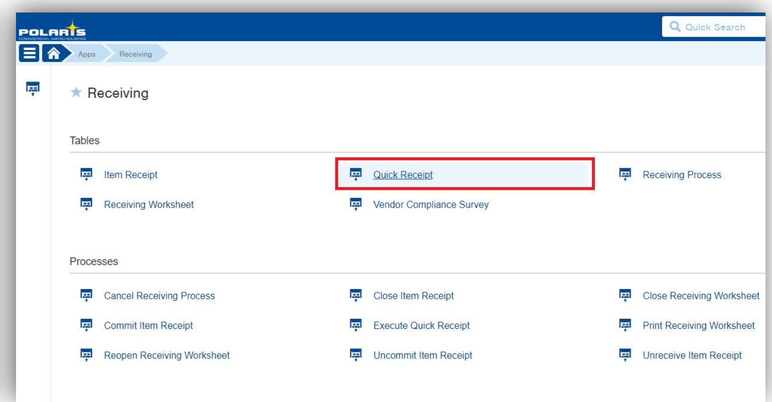

Figure 2b - Once in Receiving, select Quick Receipt

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

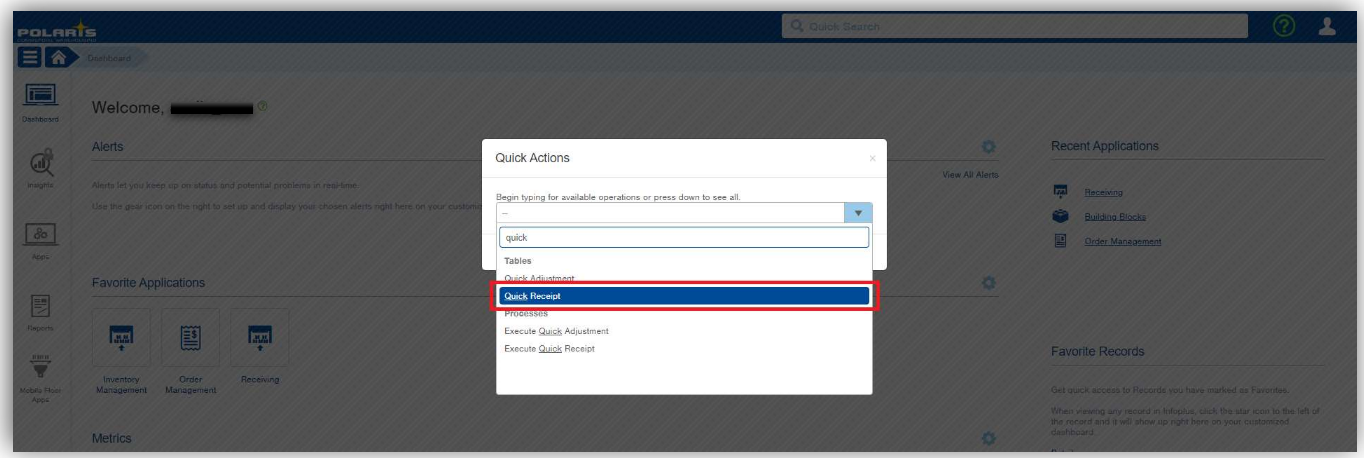

Figure 2c - Press the . key on the keyboard to bring up Quick Actions, where you can navigate to tables quickly

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 Smart Filter for easier viewing.

Step 2: Select Bulk Load

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

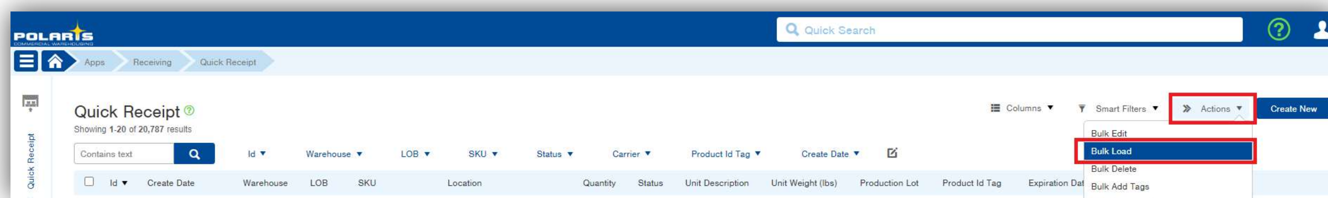

Figure 3a - Select Actions, then select Bulk Load.

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,

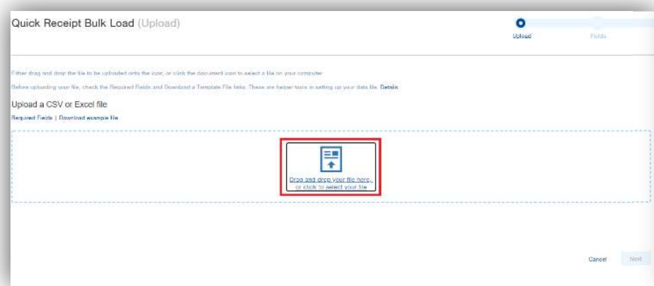

Figure 3b - Select your file to be uploaded.

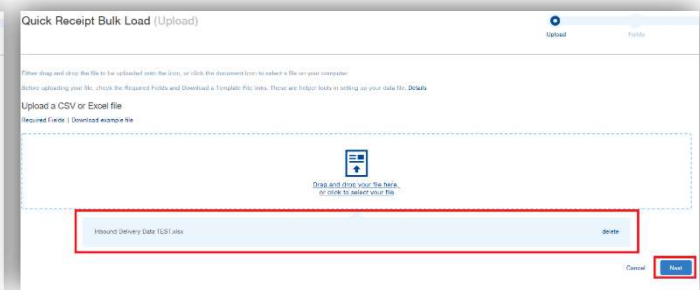

Figure 3c - Confirm correct file was uploaded and hit Next.

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.

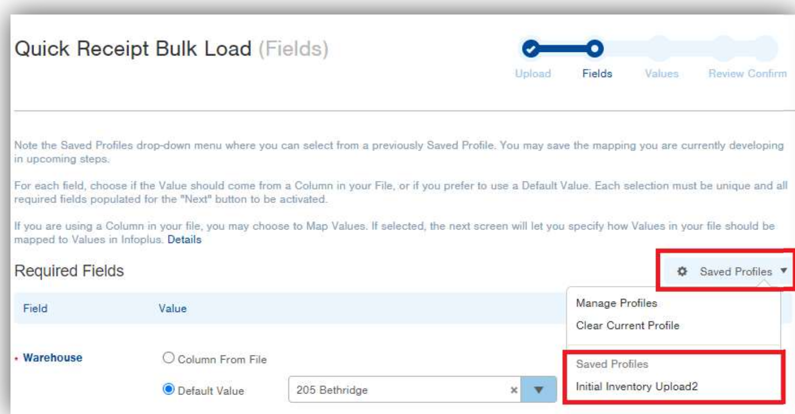

Figure 4a - The Saved Profile name will differ from the one displayed here.

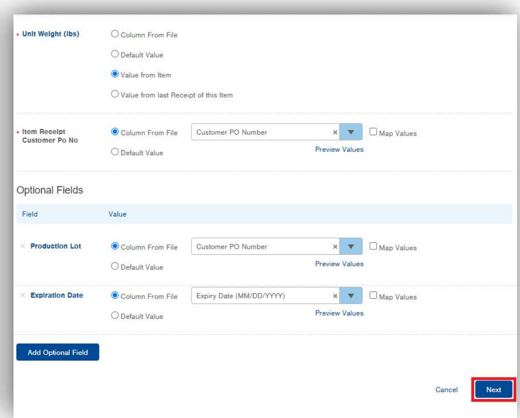

Figure 4b - Once profile is selected, hit Next.

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.

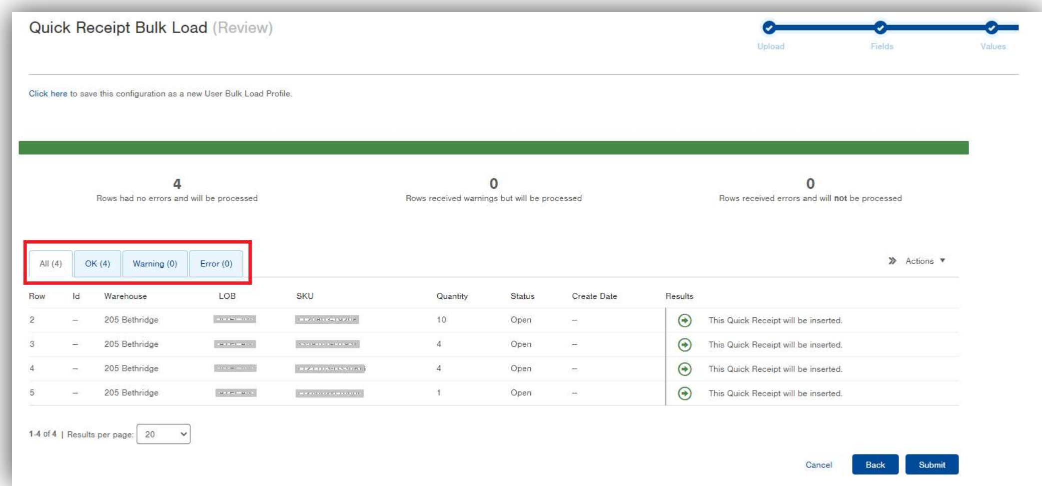

Figure 5a - Summary of data captured, while showing any potential warnings or errors.

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.

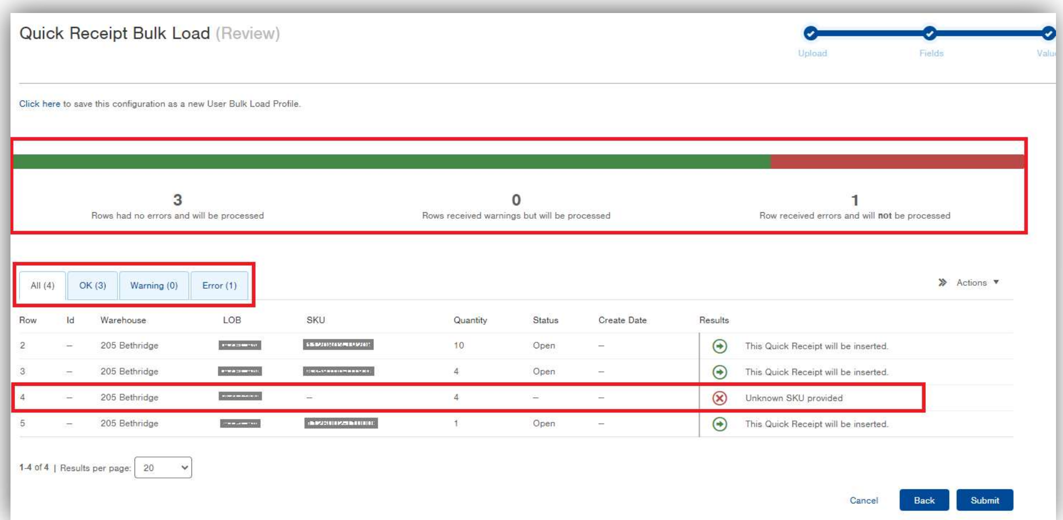

Figure 5b - The Results column will show you the reason for the error.

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 [contact us]() 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 customerservice@commercialwarehousing.ca.

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 PCW EDI and API Specifications document by clicking the link here.

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.