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About Polaris Systems

Polaris Systems owns and publishes the Polaris business management system for re-manufacturers, re-builders and parts distributors. The company provides computer hardware, software, training and on-going support services to customers located throughout North America. Polaris Systems is organized into four primary groups.

Software Engineering & Development

The engineering team continually enhances the application software to maintain its market leading position. Ideas for enhancements are solicited from the management team and customer base. Projects are prioritized with input from the Client Advisory Board, which is made up of customers elected by client base at the annual user conference. Polaris Systems has historically issued 2 new releases of Polaris per year. New releases of the software are distributed to all customers subscribing to the annual maintenance program. Software releases are accompanied by release control notes and documentation on diskette in Microsoft Word format.

Help Desk and Technical Services

The company maintains a full time technical services staff to operate the Help Desk, a response center for assisting customers experiencing system problems. The Help Desk provides single call, front line support for all hardware and software questions or problems that periodically arise. An on-line support management system tracks open calls to ensure appropriate follow through. The help desk has sophisticated communications equipment integrated into the support tracking system, allowing technical services representatives to even dial into a customer's system to help diagnose a problem. Toll free telephone and fax numbers are provided to customers subscribing to the annual maintenance program.

Account Management and Consulting Services

Polaris Systems understands that the best software in the world is of little value until it is integrated into your company's operating procedures. Accomplishing this requires more than classroom training, so Polaris Systems offers an Account Management program with full-time project managers to help you during implementation, re-implementation, or reconfiguration of the software as your business changes. The account managers provide "roll up the sleeves" one-on-one consulting services at your place of business. Working at your site, our consultants can help you map the capabilities of the software with your business procedures and requirements for more effective utilization of the system. Account Management services are not just for new implementations, every customer can purchase account management services for any project related to the use of the Polaris software.

Sales and Marketing

The sales and marketing staff are responsible for matching your needs and goals to the capabilities of the Polaris software, and ensuring that customer and management expectations are clearly defined and met. Polaris Systems publishes a standard price list that is applied consistently.

Our Customers

Polaris Systems supports customers located throughout the US and Canada. All of our customers are affiliated with the automotive / heavy duty industrial / diesel and performance racing industries. We are active members of ADS, AERA, APICS, APRA, APAA, PERA, PRI and RIC1. A small sample of our customer base includes*:

Engine Re-builders	Electric Re-builders	Heavy Duty Re-builders
Central Distributors	Service Dealers	Productions Re-manufacturers
Job Shops	Racing Shops	Light Manufacturing
Heavy Duty Distributors	Parts Distributors	Drive Line Remanufacturing

Software Products

Polaris is a fully integrated suite of remanufacturing, shop floor control, distribution and financial applications, including:

Order Processing	Accounts Receivable	Inventory Control
Purchasing	Replenishment	Shop Floor Control
Labor Tracking	Job Cost	Production Management
Accounts Payable	General Ledger	Job Status Tracking

Several unique capabilities are provided to specifically serve the needs of our target markets, namely:

Casting / VIN tracking	Core Management	Fleet Reporting
Kits & Assemblies	Warranty Processing	OEM Cross Reference
Electronic price updating utility	Interchanges & Alternate suppliers	AERA PROSIS spec's integrated with job tickets / travelers

The software products are very flexible and capable of handling numerous business situations differently, based on your preferences and business policy.

Customer Services

Polaris Systems offers on-site implementation assistance and training, on-going consulting, toll-free help desk, and regular new releases under our maintenance program.

Implementation Services

Every new account is assigned an Account Manager who is responsible for coordinating all aspects of your implementation, marshalling technical and application expertise as required to ensure an effective implementation and smooth transition. The implementation process is well-organized and proven effective in many customer sites.

The heart of the implementation process is a series of facilitated "applied workshops" where your account manager and project team establish a prototype of every business process in your organization in a conference room pilot. The system is progressively set up until the "model" emulates your desired business processes completely. The conference room pilot approach reduces risk of cost overruns and delays, and delivers an early proof statement that the anticipated business benefits will be achieved. Your sales representative will provide detailed implementation steps and plans.

Help Desk Operations

The Help Desk operation provides toll-free access to answer questions and handle occasional problems as they arise. The help desk is staffed with full-time experienced personnel, using an on-line call tracking system that ensures your call is resolved in an effective manner.

Customer User Group

The Polaris Systems User Group is a non-profit independent association of Polaris Systems customers. The formation of the User Group was encouraged by the company to provide a structure to promote customer driven prioritization of enhancement requests and participation in the software development process. The User Group meets annually in Greensboro, NC. The annual conference offers seminars and workshops designed to promote peer interaction and training.

Regular Software Updates

The annual maintenance program includes distribution of all new releases containing technical updates and improvements to the software programs. Every customer can submit enhancement requests, which are then grouped and prioritized with the executive board of our User Group.

Learning more about Polaris Systems

Polaris Systems can travel to your site for a plant or warehouse tour and software overview to determine the preliminary fit. For mutually attractive opportunities, we also conduct a series of one-on-one workshops at our offices in Greensboro, NC, or your place of business. The workshops are intended to provide a thorough demonstration of the software and its ability to meet your specific business requirements.

Section 1 Price Pro for Microsoft Excel

Overview

Price Pro is an effective and time efficient way to update the prices of parts you purchase from outside vendors. Price Pro works by taking the information supplied by a manufacturer, formatted in an Excel spreadsheet, converted and transferred into Polaris by SB Client and then updates the parts you stock with the new prices. In addition, PricePro will update all open orders in your order file with the calculated selling prices and costs based on the recent price update. Manufacturer's prices can be updated in a fraction of the time it takes to do it manually. Multiple warehouses can be updated at the same time. Businesses with multiple Polaris accounts can have prices updated using the same Polaris PCE file. Price Pro also allows you to find the prices on parts you do not stock when inquiring on a part in Operation PI or P or using the 'MFG' function at the Order Entry screen in Polaris.

When you receive the new price information from a manufacturer, use Microsoft Excel to prepare the prices to be transferred to Polaris. At this time the data can be changed and manipulated so that it meets your needs and requirements. In Excel, you have many capabilities including posting superseded part numbers so that during part lookup, you can see immediately that the part has been superseded and know its new number. You can also adjust the information in Excel so that any comments or previous part numbers for an item can be easily seen.

After the manufacturer's information has been adjusted and formatted, SB Client is used to convert and transfer the new prices into the PCE file in Polaris. The PCE file is a holding file for prices until they become effective. 'Load Price Edit to Deferred' looks at the information you transferred into the PCE file and compares it to parts that you stock. Any parts that match the PCE file have the new price put into a 'deferred price' field. Those parts that are not stocked can be put into the MP file. The MP file is where you can find, through Order Entry, the price of a part that you do not stock (versus looking it up in the manufacturer's price book).

In 'Load Price Edit to Deferred', you can set when the new prices are effective. If you want the new prices to be loaded at a later date, enter that date and the prices will be loaded through the nighttime process on that effective date. If you want the new prices to be effective immediately, then run 'Post Price Changes'. This updates the prices for any parts that were affected by 'Load Price Edit to Deferred'.

When PricePro is completed with the update, it will ask you if you want to update existing open orders. When answering yes, PricePro searches for open orders that contain an order date that exceeds the effective date of the update, and changes both selling price and cost for that order. The selling price is recalculated based on the new pricing and the order totals are updated.

Chapter 1: Using Microsoft Excel

If the manufacturer emails or sends the price updates on a CD, open Microsoft Excel and open the file (make sure that the Files of type box says 'All Files').

The Text Import Wizard automatically opens. If you know the file supplied by the manufacturer is Delimited or Fixed Width, select it now on the top part of the Text Import Wizard window, and then click on Next.

Included with the manufacturer's disk is a list of how many spaces each field requires. (For example, the part description is 15 spaces long) Using this information, separate the data following the Text Import Wizard instructions.

Once the data has been separated, click Next. The next window simply gives you another opportunity to review the information before it is placed in the spreadsheet. Once you are satisfied with the data and it is separated correctly, click Finish. The data should be in the spreadsheet.

Right click the mouse on the Row Header number 1. Select insert, a new row inserts at the top of the spreadsheet.

Right click the mouse on the column header Letter A, select insert. Another column inserts at the very left of the spreadsheet. Type 'VENDOR' in cell A1.

*******Important Note*******

When formatting the spreadsheet with the manufacturer's information, the system requires only "VENDOR" and "PART.NUMBER" and of course, a price as the necessary information. Where this information is placed with respect to column has no relevance in making PricePro transfer information correctly.

Based on the above note however, we do recommend the following format when setting up Excel with the manufacturer's information:

- A VENDOR (Vendor)
- B PRTNBR (Part number)
- C P1 (Price 1, normally cost)
- D P2 (Price 2)....etc.

What is important is the fact that the order you have the information located in the spreadsheet matches the order by which you tell SbClient the information is in when transferring the file to Polaris.

Below is a listing of all the information that PricePro now has the capability to transfer during a price update:

- Vendor (Required)
- Sub Vendor
- Part Number (Required)
- Price.1 (At least one price required)
- Price.2
- Price.3
- Price.4
- Price.5
- Any Additional Price Fields
- Weight
- Description
- Master Pack
- Effective Date
- Unit off Measure
- Core Price
- Core Cost
- Status
- Replace Part
- Escalator (Part Number Level)

The prices that are transferred into Polaris must contain the decimal points. If the prices supplied by the manufacturer do not contain the decimal point, they need to be added. If the decimal points must be added see Chapter 6 containing helpful hints for Excel.

Saving your Spreadsheet

Save as a workbook first

When the information is arranged, you are ready to save the spreadsheet that contains the manufacturer's data. Select Save As from the File menu and name the spreadsheet. Click Save.

Then save as a CSV File next.

From the File menu, click Save As again. At the 'Save as type' box, click on the down arrow, scroll down, select CSV (comma delimited) and click Save.

*******Important Note*******

You should always save your spreadsheet as a Microsoft Workbook first and then save it as a CSV file. If any changes need to be made afterwards, always open the Microsoft Workbook, make the changes to the workbook and then save the workbook. Then save as a CSV again.

Chapter 2: Transfer data from PC to Host

At the Polaris Master Menu, select any menu item (so that you are not at the master menu). At a second level menu, depress '0' (zero). This drops you to a 'real' TCL prompt.

In SB Client, select Transfer and then click on PC to Host. Under PC, click on the button to the right of the File line. This allows you to search for the directory, or file folder, that contains your spreadsheet file just like Windows Explorer. Select the spreadsheet containing your price updates.

PC To Host Data Transfer Screen

Under Host, enter 'PCE' for the File and Dict.

The Browse button, indicated by the 3 dots - ... can be pressed at any time as an intuitive help feature to assist you in finding pieces of information or files that may not be remembered.

For ID enter '(the vendor code for the manufacturer you are updating) a period (.) and corresponding pound signs (#)'. It should look similar to 'LUC.####'

IMPORTANT NOTE

The number of # signs should be the same as the number of digits of parts you are transferring. i.e. if you are transferring 987 parts, you should have 3 # signs; 10,235 parts you should have 5 # signs.

For Fields, enter the fields that match up with the spreadsheet columns. Clicking the "Browse Button" at the far right side of the Fields prompt will provide a listing of all of the fields.

You may click on Save at the right side of the window to save the configuration you just entered. Enter the vendor's name you are loading in the Stored Definitions box. The next time you update this particular vendor, you will not have to re-enter this information. (Make sure the spreadsheet name is the same). To open the configuration at a later time, select Load in the PC to Host data transfer window. Double click on the vendor configuration you want to use.

Once you have entered all the information in the PC to Host data transfer window, you are ready to send the spreadsheet to Polaris. Click on the Start Transfer button at the bottom of the window.

You can watch the transfer process at the very bottom of the window. First, the data is converted. Then the data is sent to the Host system. Depending on the number of parts you are updating, this could take some time (in some cases over an hour and a half). While the transfer is taking place, a bar graph displays at the bottom of the window indicating how much information has been transferred and how much is remaining. Also, on the bottom right of the PC to Host data transfer window, a meter displays how much time has passed since the transfer was started. When the transfer is complete, the red bar graph returns to the left side, and the status indication displays complete. If any problems occur, the status indicator shows that the transfer was not successful.

Once the transfer is complete, close the SB Client PC to Host data transfer window.

Drop to the TCL prompt and enter 'LIST PCE'. This displays all of the items in the PCE file, where you just loaded the spreadsheet data. The system lists the Dict items and what was transferred in. The first row of your spreadsheet lists the Dict items you loaded. Make sure the Polaris system's fields and the field data you loaded match. Look at the actual prices to make sure the decimal point in the price is at the correct place. After reviewing the information in the PCE file, depress 'Ctrl-X' to exit the process. At the TCL prompt, type 'MM'. This takes you to the Polaris Master Menu.

Chapter 3: Load Price Edit to Deferred

Overview

Load Price Edit to Deferred looks at the information transferred into the PCE file and compares it to the parts in stock. Price Pro commands are found on the Price Change Menu.

Operating Procedure

Process Name: PRICE.CHANGE.LOAD

Inventory Master Menu
 Inventory Pricing Menu
 Price Change Menu
 Load Price Edit to Deferred

Warehouse or ' for all warehouses**

Enter a particular warehouse where you would like to load the price changes. The system defaults to '** for all warehouses.

Enter the Effective Date (MM-DD-YY) or 'S'kip

If you are loading the new prices before they take effect, you can enter the date that they become effective. The system stores the updated prices, and the night before the date you entered the system automatically changes the prices. If you want to make the new prices effective immediately, enter an 'S' to skip. The system defaults to 'S'kip.

Do you wish to Strip Leading Zeros (Y/N)?

If parts are entered with leading zeros the zeros need to be removed by entering 'Y'es at this prompt. Should you enter 'N'o and find that some of the parts did not load, you have to re-load the parts, and enter 'Y'es the second time. The system defaults to 'N'o.

Enter Specific Vendor or 'S'kip

The system defaults to 'S'kip, and in most cases should remain. If you have parts under different vendors and only want to update one of them, enter the vendor code. By 'S'kipping this prompt, the system updates the price anywhere it finds that particular part number.

Enter Specific Sub-Vendor or 'S'kip

Again, if you only want to update the part for a particular sub-vendor, enter the sub-vendor code. Otherwise, enter 'S'kip and all of the parts for with this part number will be updated.

Create MFG records for not on file parts

If there are parts in the PCE file that you do not stock, enter 'Y'es to have those part put into the MFG file. If you do not want to have a listing of the parts offered by the manufacturer that you do not stock, enter 'N'o at this prompt. The system defaults to 'Y'es.

Chapter 4 Post Price Changes

Overview

If you did not enter an effective date and want to make the price changes effective immediately, you can do so by running Post Price Changes.

Operating Procedure

Process Name: DEF.PRICE.APPLY

Inventory Master Menu
 Inventory Pricing Menu
 Price Change Menu
 Post Price Changes

Enter Last Date for Selection (MM-DD-YY) or 'S'kip

If you 'S'kip this prompt, the system loads any price changes that have been loaded and run through the 'Load Price Edit to Deferred' program. At this point the system makes any deferred prices effective.

When the system finishes making any deferred prices effective, it returns you to the Price Change Menu. Any inquiry of the part numbers shows if the new prices took effect.

If you entered an effective date, you have completed loading the prices. To check and see if the prices were loaded correctly, go into Parts Inquiry for one of the part numbers you loaded. At the Type of Inquiry, enter 'D'ferred. The new price displays with the date that it becomes effective.

In many cases, there may not have been a change in a parts price. In order to see if the part's price was updated, inquire on the part through 'PI' and enter 'G'eneral for Type of Inquiry. The general information should tell you when the last price change took effect. If it shows today's date, you know that the part was updated and there was no change in its price.

Chapter 5 Helpful Hints for Microsoft Excel

Inserting decimals in prices

- All prices transferred into Polaris must contain decimal points. If the prices supplied by the manufacturer do not contain a decimal point, they need to be adjusted so that they do.
- Open your spreadsheet containing the manufacturer's prices. Right click the mouse on the column header letter of the column that contains the price without decimal points and select insert. Another column should be inserted to the left of the column containing the price. In cell 2 of the new column enter '=' and then click in cell two of the column that contains the price. To insert two decimal place, type a '/100'. The formula should read something like 'C2/100'. Then depress <ENTER>. Fill in the remaining cells by moving the mouse towards the bottom right of the cell that contains the formula until it turns to a solid '+'. When it changes to a solid '+' depress and hold the left mouse button. While holding the left mouse button move the solid '+' towards the bottom of the spreadsheet. Release the left mouse button when you have reached the last part in the spreadsheet, and all of the cells in that column have been highlighted. The column should now contain the prices with decimal points.
- Right click the mouse on the column header letter of the column that contains the new prices and select copy. Then right click the mouse on the column header letter for the column that the price should be in (cost in column 'D', list price in column 'H', core price in column 'P', etc.). Then select Paste special and mark Values and then click on OK.
- Repeat these steps for every price listed that does not contain decimals. After you paste the values, delete the columns that you do not need.

Taking advantage of the MFG function

- If you are planning on using the MFG function of Price Pro, include all of your different pricing levels (P1, P2, P3, P4, P5) in Excel. That way when you do MFG at the Order Entry screen in Polaris, all of the different price levels are shown.
- Even if the manufacturer only gave you cost and/or suggested list price you can use Excel to fill in the rest of the price fields. (Examples follow) Putting the manufacturer that you want to use in the proper column in the Excel spreadsheet supplied can do this.
- The manufacturer supplied you with the cost, which should be in column 'E'. List price is 2X cost:

In cell H2 enter '= (click in the D2)*2' and then depress return. Cell H2 should have the amount listed in cell D2 multiplied by 2. Click in cell H2, the formula should read: '=D2*2'.

Fill the rest of the cells by highlighting and dragging the mouse like when adding decimals to prices. You are copying the formula you entered in cell H2 for all the parts and the correct value displays in each cell.

The spreadsheet cannot contain any formulas when being transferred into Polaris; It must contain values. To convert formulas to values, follow these directions. At the top of the spreadsheet, right click the mouse on the column header 'H' and select insert. Another column inserts to the left of the column that you just copied the formula. Right click the mouse on the column with the formulas in it and select copy. Right click the mouse on the column header 'H' and select 'Paste Special'. Select 'Values' and depress OK. Delete the column containing the formulas. In cell H1 type P1 for Price 1. List price for all of the parts is now in column 'H'.

- Price 2 is 90% of list:

The formula used in cell H2 (after a new column was inserted to the left of list price) should read: '=I2*.9'. Excel automatically adjusts the formula for the correct row number when it is copied down (For example the formula in cell H445 will read: '=I445*.9').

- Continue the process of inserting a new column, entering the formula, copying it down for all parts, copy/paste special, and deleting the inserted column for all price fields. When you are done you should have a price (not a formula) listed in columns D, E, F, G, and H.
- If the only information you want to transfer is the part number and some of the prices, it can be done as well. Simply prepare those columns that you want to transfer. Then in the PC to Host Data Transfer window, select the DICT items you want to transfer.

Changing the price from package to piece

Many times a manufacturer only sells a part in a package that contains several of the parts. For example, Stanadyne only sells transfer pump blades (part number 20511) in packages of four. The price they show for 20511 on the disk they provide is the price for four blades, not one blade. In order to correct it so that the price being loaded into Polaris is the price per each, a formula must be used.

Click in cell 2 of any empty column. Enter an '=' (equal sign) and then click on cell 2 in either the cost or list price column. Then enter a '/'. Next click in cell 2 of the column that contains the number of parts in a package, or package quantity. Most manufacturers that price by package quantity include a column that contains the number of pieces in a package for that particular part; that is the column you want to select. Then depress Enter. Copy that formula down through the spreadsheet for all parts. Right click on the column with the formula and select insert. Right click again on the same column and select copy. Right click on the inserted column and select Paste Special, then Values and OK. Right click on the column with the formulas and select delete. The new column contains the piece price for parts that come in a package of more than 1.

Click in cell R1 (any column will work, as long as it is NOT between A-Q). Then select Function from the Insert menu (Or you can use the shortcut button on the toolbar; It looks like an 'f' with an 'x' beside it). Another window appears listing different formulas. Click on 'IF' on the right side of the window and depress OK.

A new window appears to enter the information for the formula. For Logical_test, click in the second cell down in the column that contains package quantity. In the formula window, after the cell location you selected enter a '<=' and then 1. It should read something like: 'T2<=1' for logical test.

Click in the box beside Value_if_true and then click on the second cell down in the column that you created that contains the cost/suggested list price. That cell location should be listed in the box Value_if_true.

Click in the box beside Value_if_false. Then click on the second cell down in the column that contains piece price supplied by the manufacturer. Then click OK.

What we did was tell the system if more than one part is in a package to use the adjusted list price, or piece price, created earlier. And if there is only 1 part in a package to use the cost/suggested list price given by the manufacturer.

Copy the formula down for all parts. Then right click the mouse on the column header letter for the column that the formula is in, select copy. Then right click the mouse either on the column header 'D' (for cost) or 'H' (for list) and select Paste Special and values. Now the price in the column will be piece price for all parts.

Chapter 6 Trouble-Shooting

Problem	Possible Solution
Some cells in my spreadsheet contain '####'.	When cells contain '####', that means that the cell is not big enough to show all the numbers. Highlight the entire spreadsheet, and then from the Format menu, select Column and AutoFit.
After I copy a formula from one cell to the rest of the column, the prices are not correct.	When you entered the formula, did you 'click' on the cell you wanted the formula to get its information from, or did you manually type the cell address (did you type 'D2', or did you click on cell 'D2')? Be sure to <u>click</u> on the correct cell. Did you use the correct column in your formula?
I cannot remember what column contained the information supplied by the manufacturer (i.e. cannot remember which column was list price, cost, or core cost.	In most cases just looking at the prices should tell you if it is list vs. cost. If all else fails, you might have to reopen the file supplied by the manufacturer.
How do I check to see if my columns contain values (numbers) and not formulas?	Click on the cell in question. The formula bar above the spreadsheet shows what is actually in that cell. If the cell contains values it displays numbers. A formula starts with an '='.
Some of my columns contain formulas and not values (numbers).	Right click the mouse on the cell that contains the formulas, and select insert. Right click the mouse again on the same column, and select copy. Right click the mouse on the column that you inserted, select Paste Special and values. Then click OK. Delete the column containing the formulas.
When I look at the data transferred into the PCE file, it doesn't show decimal points.	Prices in the Excel spreadsheet need to contain decimal points, if they don't you need to insert them. This can be done by inserting another column and using a formula similar to '=D2/100'. Then copy this formula down through all of the parts. Copy the answers again so that the cells contain values (numbers) and not the formula.
When I start my Transfer with SB Client, it runs for a couple of seconds, and then the message 'CANCELLED' displays and it stops.	Make sure that the spreadsheet you are using is closed. SB Client cannot open it if it is still open in Excel. Check all your connections. Are you connected to the Polaris System? Is your serial connection working, or is the modem connected? The computer that contains Polaris needs to have the SB Client library loaded on it. All of the 'Q' pointers need to be installed according to the SB Client documentation. You should be at a TCL prompt in Polaris. Save your worksheet in CSV format. Set SB Client to transfer in CSV Format.

	<p>Select the correct spreadsheet file in the PC to Host Transfer window (the spreadsheet you worked on in Excel should be the same as listed in the PC file line).</p>
<p>SB Client aborts my transfer after about a half an hour for no apparent reason.</p>	<p>Make sure that the PCE file in Polaris is empty. If you have used Price Pro several times, some of the information from previous price changes may still be in the PCE file. The PCE file can only hold a certain amount of information. Any remaining information in the PCE file should be removed through 'Delete Price Change Edits'.</p> <p>If your spreadsheet contains more than 9,999 parts, it may be necessary to make two transfers. Cut and Paste the spreadsheet to move half of your parts into another spreadsheet. Transfer and update the first half, clean out the PCE file and transfer and update the second half.</p>
<p>When I am running 'Price Change to be Loaded', I get the error message 'NON-NUMERIC DATA USED WHEN NUMERIC DATA REQUIRED; ZERO USED INSTEAD'.</p>	<p>If this error only displays during the beginning of the transfer for about 15 times, do not worry. It is because of the headings you used in row number 1 of your spreadsheet.</p> <p>If the error comes up more than this, make sure that your spreadsheet does not contain any formulas. If there are no formulas, and everything transfers and updates ok, do not worry about the message. If something does not transfer and update, then compare data to find the problem.</p>

Section 2 Import Files Into Polaris

Overview

This operation was designed to give you complete control over your inventory file. The Polaris Systems Account Management staff uses this tool to input inventory files for our new customers. However, it can also be used as a very effective tool for existing customers.

The basis of all of the import utilities rely on three main ingredients:

1. A Microsoft Excel spreadsheet of data formatted very carefully
2. SB Client
3. A program that converts the database of data into your actual files (in this case, IM).

Operating Procedure

Open the attached MS Excel spreadsheet. Use the table provided below to fill-in your spreadsheet. (The Import Parts program loads parts into warehouse 1.)

When the information is arranged, you are ready to save the spreadsheet that contains the manufacturer's data. Select Save As from the File menu and name the spreadsheet. At the 'Save as type' box, click on the down arrow, scroll down, select CSV (comma delimited) and click Save.

At the Polaris Master Menu, select any menu item (so that you are not at the master menu). At a second level menu, depress '0' (zero). This drops you to a 'real' TCL prompt.

In SB Client, select Transfer and then click on PC to Host. Under PC, click on the button to the right of the File line. This allows you to search for the directory, or file folder, that contains your spreadsheet file just like Windows Explorer. Select the spreadsheet containing your price updates.

PC To Host Data Transfer Screen

The screenshot shows the 'PC To Host Data Transfer' dialog box. It contains the following fields and controls:

- PC Section:** A 'File' text box with the path 'E:\Polaris System\Import\Thread Kits-1.csv' and a browse button (...).
- Host Section:** 'File' (IMPORT), 'Dict' (IMPORT), 'ID' (TKP.###), and 'Fields' text boxes, each with a browse button (...).
- Format Section:** A dropdown menu set to 'C.S.V' and a 'Translate' button.
- Mode Section:** A dropdown menu set to 'Overwrite' and a 'Spooler Output' checkbox.
- Transfer Section:** A progress bar showing '0', a 'Start Transfer' button, and a timer showing '00:00:00'.
- Status Section:** A 'Status' text box.
- Right Side Buttons:** 'Cancel', 'Load...', 'Save...', 'Delete...', and 'Help'.

Under Host, enter 'IMPORT' for the File and Dict.

For ID enter '(the vendor code for the manufacturer you are updating) a period (.) and corresponding pound signs (#)'. It should look similar to 'LUC.####'

IMPORTANT NOTE

The number of # signs should be the same as the number of digits of parts you are transferring. i.e. if you are transferring 987 parts, you should have 3 # signs; 10,235 parts you should have 5 # signs.

For Display Fields, leave this area blank. Set the Format to CSV. For Mode, select Overwrite.

Click on Save at the right side of the window to save the configuration you just entered. Enter the vendor's name you are loading in the Stored Definitions box. The next time you update this particular vendor, you will not have to re-enter this information. (Make sure the spreadsheet name is the same). To open the configuration at a later time, select Load in the PC to Host data transfer window. Double click on the vendor configuration you want to use.

Once you have entered all the information in the PC to Host data transfer window, you are ready to send the spreadsheet to Polaris. Click on the Start Transfer button at the bottom of the window.

You can watch the transfer process at the very bottom of the window. First, the data is converted. Then the data is sent to the Host system. Depending on the number of parts you are updating, this could take some time (in some cases over an hour and a half). While the transfer is taking place, a bar graph displays at the bottom of the window indicating how much information has been transferred and how much is remaining. Also, on the bottom right of the PC to Host data transfer window, a meter displays how much time has passed since the transfer was started. When the transfer is complete, the red bar graph returns to the left side, and the status indication displays complete. If any problems occur, the status indicator shows that the transfer was not successful.

Once the transfer is complete, close the SB Client PC to Host data transfer window.

Drop to the TCL prompt and enter 'LIST IMPORT'. This displays all of the items in the IMPORT file, where you just loaded the spreadsheet data. The system lists the Dict items and what was transferred in. The first row of your spreadsheet lists the Dict items you loaded. Make sure the Polaris system's Dict items and the Dict items you loaded match.

Look at the actual prices to make sure the decimal point in the price is at the correct place. After reviewing the information in the IMPORT file, depress 'Ctrl-X' to exit the process. At the TCL prompt, type 'MM'. This takes you to the Polaris Master Menu.

Enter '/IMPORT.PARTS', and your import will begin to turn the data from the IMPORT file into active IM records.

You will see a counter start increasing on the left side of the screen. The counter indicates the number of records that it has processed. This gives you an indication of time.

Microsoft Excel spreadsheet layouts

Chapter 1 Import Parts

<u>#</u>	<u>Column</u>	<u>Field</u>	<u>Required</u>	<u>Description</u>	<u>Format</u>
1	A	Type	Y	Must be "P"	
2	B	Vendor	Y	Enter a valid three-character vendor code that exists in Vendor Maintenance.	XXX
3	C	Sub Vendor	N	Enter a valid sub vendor number that corresponds to the vendor entered above. Sub vendors are used to breakdown product lines within a vendor. (See Vendor Maintenance)	#
4	D	Part Nbr	Y	Enter a part number without spaces or slashes. You may, however, use hyphens in your part numbers. If you enter a part number that already exists in your inventory master file, a message displays informing you that the part already exists in inventory. If you are updating an existing inventory part number, enter that part number with its vendor prefix.	
5	E	Price 1	N	Cost	
6	F	Price 2	N	Price 2	
7	G	Price 3	N	Price 3	
8	H	Price 4	N	Price 4	
9	I	Price 5	N	Price 5	
10	J	Weight	N	Enter the weight of this item in hundredths.	If weight is 5.2 pounds, enter '5.2', with decimals.
11	K	Description	N	Enter the part's description. This description is used to lookup part numbers during Order Entry using the automatic catalog feature of Polaris. It is very important to be descriptive and consistent in describing your part numbers. Do not abbreviate words, unless you ALWAYS use that abbreviation.	
12	L	On Hand	N	Updates the On Hand quantity (*Use	

				Caution*)	
13	M	Reserved	N	Reserved (Do not use. Leave blank.)	
14	N	Reserved	N	Reserved (Do not use. Leave blank.)	
15	O	Master Pack	N	Enter the units of measure that make up one pack when purchased. This information is used in automatic purchase ordering. If the item is sold individually, leave this field blank. It automatically fills to 'EA' (each).	If 10 pair of this item makes up 1 pack, enter '10'.
16	P	Unit	N	Enter a Unit of Measure by which this item is sold. How is the item priced? This must be a valid unit of measure.	Ex. EA = each, SET = set, PR = pair
17	Q	Core Charge Amount	N	The default core charge amount with period.	Ex. 100.00
18	R	Core Cost	N	The default core cost amount with period.	Ex. 100.00
19	S	Status	N	Enter the automatic purchasing status of the part. Never override status to 'RP'. The status field defaults to 'OP'. See Purchasing Management manual for more information on statuses.	
20	T	Alternate Manufacturer Nbrs	N	Enter part number(s), comma separated. This utility enables you to enter alternate manufacturer part numbers. Once entered, an automatic cross-reference to your part number will be built. In Order Entry, a customer can order using the "alternate manufacturer number", and the system automatically crosses over to your part number. Optionally, the alternate number can be printed on documents.	
21	U	Alternate Manufacturers	N	Enter the alternate vendor for the part number, separated by commas. Your alternate manufacturer codes are required to be setup in your Code Descriptions 'AN' file before entering this information.	
22	V	Escalator	N	Enter a valid escalator from Escalator Maintenance. The five price levels set up in Code Descriptions 'PC' file appear. Enter the required prices, and the other levels calculate based on the parameters established in Escalator	

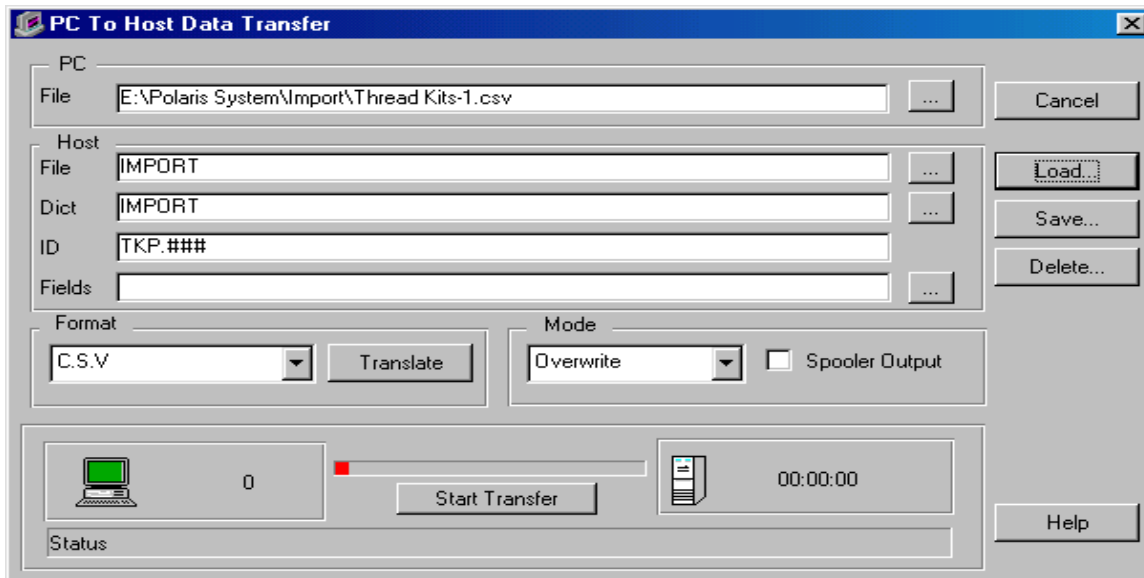
				Maintenance. (If none entered, defaults first to sub-vendor, then vendor, then none which means all price fields must be filled in.	
23	W	Bin Location	N	Enter a four-digit bin location number. It is required that you use only numbers when assigning bin numbers. You may develop your own bin numbering scheme, however be sure to use only four digits. We suggest the first two digits represent the row and the second two digits represent the vertical bin. Do not separate bin locations by shelf.	####
24	X	Inventory Class	N	Enter the inventory classification number for this item. See Code Descriptions Inventory Classification.	
25	Y	Substitution List	N	Enter the part number(s), separated by commas. This utility enables you to enter any part numbers that may be used as substitutes to any inventory item. The substitute part number is not required to be a stocking inventory item. These substitutes are used during Order Entry if an inventory item is currently out of stock.	
26	Z	Alt Supplier	N	Enter the alternate supplier's number from Alternate Supplier Maintenance. This utility enables you to enter any alternate suppliers from whom you purchase this item. You may enter as many alternate supplier numbers as needed. The automatic purchasing system enables you to generate a purchase order by alternate supplier.	
27	AA	Catalog Info	N	If your company has its own catalog, then this program enables you to make additional comments and notes about the products in the catalog. Or you can use this field as a freeform to put any additional information about this inventory item. The system will cross-reference any word in this section that is three or more characters.	
28	AB	Comments	N	Enter inventory comments separated by commas. This is a freeform field.	
29	AC	Jan	N	Prior monthly sales quantities.	

30	AD	Feb	N	Prior monthly sales quantities.	
31	AE	Mar	N	Prior monthly sales quantities.	
32	AF	Apr	N	Prior monthly sales quantities.	
33	AG	May	N	Prior monthly sales quantities.	
34	AH	Jun	N	Prior monthly sales quantities.	
35	AI	Jul	N	Prior monthly sales quantities.	
36	AJ	Aug	N	Prior monthly sales quantities.	
37	AK	Sep	N	Prior monthly sales quantities.	
38	AL	Oct	N	Prior monthly sales quantities.	
39	AM	Nov	N	Prior monthly sales quantities.	
40	AN	Dec	N	Prior monthly sales quantities.	
41	AO	Alternate Price Supplier	N	Enter the alternate supplier's number from Alternate Supplier Maintenance, separated by commas.	
42	AP	Alternate Price Part Number	N	Enter alternate price part number(s), separated by commas.	
43	AQ	Alternate Price Supplier Cost	N	Enter alternate price supplier cost(s), separated by commas.	
44	AR	Alternate Price Supplier Preferred	N	Enter 'Y'es if this is the preferred supplier and the Automatic Backorder system will use this supplier, number and cost when ordering the part. If not, leave 'N'o.	Y or N
45	AS	Minimum Stock Quantity	N	Enter the minimum stock quantity for those items that orders levels cannot ever go below.	
46	AT	Other SC Slots	N	Enter other special charges besides core price and core cost that you want to attach to the part. (comma separated)	
47	AU	Other SC Amounts	N	Enter the special charge amounts separated by commas that co-inside with the SC slot above.	
48	AV	Other SC Costs	N	Enter the special charge costs separated by commas that co-inside with the SC slot above	
49	AW	New Part Number	N	If this is a replaced part, enter the part number with vendor code here.	
50	AX	UPC Code	N	Enter the UPC Code from the manufacturer of the part (numeric)	
51	AY	Alert Message	N	Enter the Alert message for the part.	

52	AZ	Price.6	N	If you have more than 4 selling prices and 1 cost, then use Price 6 to add more pricing.
53	BA	Price.7	N	Used for additional pricing
54	BB	Price.8	N	Used for additional pricing
55	BC	Price.9	N	Used for additional pricing
56	BD	Price.10	N	Used for additional pricing
57	BE	Price.11	N	Used for additional pricing
58	BF	Price.12	N	Used for additional pricing

- The Import Parts process only updates items with the fields that have values for existing records.
- Any field on an existing item can be cleared by putting a '\ (backslash) in the field.
- If the description or catalog information has changed the DX (Desc Xref) updates.
- Import Parts recalculates pricing if any price field or the escalator has changed.
- All comma-separated fields append information unless an operation is the first comma separated value. 'A' is append, '\ is clear, and 'R' is replace existing with import field. In the case of 'A' or no operation the system only appends comma separated values that do not already exist within the field.
- The system trims the spaces from the part numbers when updating is case this was not done within the spreadsheet.

PC To Host Data Transfer Screen



Chapter 2 Import Alternate Suppliers

<u>#</u>	<u>Column</u>	<u>Field</u>	<u>Required</u>	<u>Description</u>	<u>Format</u>
1	A	Type		Must be "AS".	AS
2	B	Supplier Nbr	Y	Three number Supplier ID.	###
3	C	Name	Y	Enter the supplier name.	
4	D	Short Name	Y	Enter a short Name for the supplier	
5	E	Country	Y	Enter the country code for the supplier.	
6	F	Address #1	Y	Enter the first address line.	
7	G	Address #2	N	Enter the second address line	
8	H	City	Y	Enter the city for the supplier.	
9	I	State	Y	Enter the two-character state abbreviation for the supplier.	
10	J	Zip	Y	Enter the zip or zip + 4 for this supplier.	#####, #####
11	K	Phone	N	Enter the phone number without slashes or dashes.	#####
12	L	Fax	N	Enter the supplier's fax number.	
13	M	Email	N	Enter the e-mail address for the supplier.	
14	N	Contact	N	Enter the contact with the supplier.	

- Process to initiate the import is IMPORT.AS.
- All fields are updated as they would be through ALTERNATE.SUPPLIER.MAINT.
- If an item is already on file it replaces only the items that were defined in the transfer.

Chapter 3 Import Customers

<u>#</u>	<u>Column</u>	<u>Field</u>	<u>Required</u>	<u>Description</u>	<u>Format</u>
1	A	Type	Y	Type of import item must be "C".	
2	B	Cust Nbr	Y	Enter a number for a customer account.	
3	C	Name	Y	Enter the customer's name.	
4	D	Address 1	Y	Enter the customer's address.	
5	E	Address 2	N	Use the second address line for a PO Box number, if applicable.	
6	F	City	Y	Enter customer's city.	
7	G	State	Y	Enter customer's valid two-character state code. (Note if the customers country is a country that is setup not to have states this is not a required field).	XX
8	H	Zip	Y	Enter a valid U.S. zip, a valid Canadian zip, or enter 'CANADA'. If the customer has a zip+4, enter without dashes or slashes.	#####, #####
9	I	County	N	Enter the customer's county. The county you enter will be used to figure tax charges for this customer when they purchase inventory.	
10	J	Country	N	Enter the customer's country.	USA
11	K	Contact	N	Enter the name of the contact(s) for the customer. List of contacts comma separated.	
12	L	OE Message	N	Enter a message that you want to display in Order Entry to remind your clerks of something in particular about this customer (i.e. "No Backorders" or "Always get a PO#"). If you place the word 'BELL' at the beginning of your OE message, the terminal's internal bell sounds anytime an order is started for this customer. Do not use slashes '/' or semi-colons ';' in your message.	

13	M	Phone	N	Enter the customer's phone number without slashes or dashes. They will be automatically inserted.	#####
14	N	Fax	N	Enter the vendor's fax number without slashes or dashes. They will be automatically inserted.	#####
15	O	Type	N	Enter a customer group number (See Code Descriptions 'TC' Customer Types). Customer group codes allow you to divide your customers into groups based on their type of business. If the customer type code is TC5, enter '5'. The long description of the customer type set up in your code description file for TC5 then displays.	
16	P	Mailer	N	Enter 'Y'es if this customer will be included on your mailing list. Enter 'N'o to omit this customer from your mailing list.	Y or N
17	Q	PO Req	N	Do you require this customer to submit a PO before they can place an order? Enter 'Y'es or 'N'o.	Y or N
18	R	Terms	Y	Enter the customer's two-digit invoice terms (See Code Descriptions 'IT' Invoice Terms). The Invoice Terms set up in your code description file for IT10 displays (i.e. CASH/CHECK).	Ex. IT10 is entered as '10'
19	S	Salesman	N	Enter a valid salesman code number. After the number is entered, it automatically loads an 'SM' in front. The salesman entered is assigned to this customer's account.	Ex. '1' or '2'

20	T	Credit Limit	N	Enter a credit limit for this customer. Enter a dollar value without commas or dollar signs. If this customer exceeds their assigned credit limit, a message appears on the Order Entry screen. If you leave this field blank, the customer will not have a credit limit.	\$1000 is entered as '1000'
21	U	Acct Type	N	Enter 'O' for an open account or 'B' for a balance forward account. If you select 'O'pen, all of the customer's open invoices will be saved by the computer from month to month. A 'B'alance Forward account will tell the system to take a customer's open invoices and consolidate them onto one invoice at the end of the month. This field defaults to 'O'pen.	O, B
22	V	Tax No.	N	Enter the tax number that corresponds to the type selected, sales, labor or core. If a tax number is not entered here, the customer will be charged tax.	
23	W	Core Handling	N	This field indicates how to process the customer's cores. Enter 'S'plit billing, 'D'ferred billing or leave blank for Normal billing method for this customer. If you wish to use Split or Deferred, please contact your Account Manager for invoice program modification.	S, D, N
24	X	Statement	N	Enter 'Y'es if you want to generate a statement for this customer at the end of the month. 'N'o suppresses the printing of an end-of-month statement for this customer. Be sure all customers with A/R terms have this field set to 'Y'es.	Y or N
25	Y	Late Charge	N	Enter 'Y'es to calculate a late charge for this customer when the customer's account is past due. 'N'o suppresses the calculation of a late charge.	Y or N

26	Z	Core Statement	N	Enter 'Y'es if you want to print a core statement for this customer.	Y or N
27	AA	Ship To Sales	N	Enter 'Y'es if this customer's billing address is different from the ship-to address. Enter 'N'o if this customer has the same billing and shipping address.	Y or N
28	AB	Miscellaneous	N	Enter 'Y'es if this is a miscellaneous customer and does not have an account on file. Enter 'N'o if this customer has an accounts receivable account. Only the special miscellaneous customer numbers have this field set to 'Y'es.	Y or N
29	AC	Grace Period	N	Enter the number of days after which a late charge will be calculated and added to this customer's account. The grace period must be a number greater than 30 here. Late charges are only calculated when the AR end of month process goes through nighttime. Therefore any number entered into the grace period field will allow the customer to avoid any late charges for the first month.	Ex '60' = 60 days
30	AD	Merch Price Code	Y	If the customer has a price table the format should be 'T*#' where # is the table number. If the customer has a price code (List + 10.00%) it should be entered in as the pricing level + number.	Ex. T*# or 5+1000
31	AE	Labor Price Code	N	Enter a valid price code from your Code Descriptions 'P'rice 'C'ode file.	
32	AF	Notes	N	Enter any notes relevant to this customer. The notes will not print anywhere.	

- After creating the spreadsheet in the above format, save as a CSV format and transfer to your Polaris system placing the records in the IMPORT file. Then run the process IMPORT.CM.

Chapter 4 Import Labor Charges

<u>#</u>	<u>Column</u>	<u>Field</u>	<u>Required</u>	<u>Description</u>	<u>Format</u>
1	A	Type		Must be 'L'.	
2	B	Labor Code	Y	Enter an abbreviation of the major job performed in the shop. For example, Align Hone Four Cylinder Caterpillar. Labor codes are used during Order Entry when you create job tickets (work orders) for your shop technicians. Each labor code contains a description, flat rate, cost, time and job steps.	AHCAT4C
3	C	Description	Y	Enter the full description of the labor code. This description prints on customer claim checks and is displayed during Order Entry when labor is viewed on the screen (Order Entry operation 'DL' Display Labor).	Align Hone Four Cylinder Caterpillar
4	D	Labor Group	N	Enter the labor group or number that coincides with the labor code entered. This labor group/number provides a way to price labor via table pricing. Labor groups are established in the Code Description 'LG' file.	
5	E	Time	N	Enter the estimated amount of time it takes to complete the job represented by the above labor code. Time is used in figuring Total Standard Cost on the system's Flat Rate Analysis report and is used in technician time analysis on the Open Job report. Enter the time in tenths of an hour with decimals.	8½ hours would be entered as '8.5'
6	F	Non Taxable	Y	Enter 'Y'es if the labor code is non-taxable or 'N'o if it is taxable. Defaults to 'N'o.	Y or N

7	G	OE Msg	N	Enter a message to display when entering this labor code in Order Entry.	Freeform
8	H	Escalator	Y	Enter the pricing escalator number to calculate pricing from. Escalators compute labor charge prices based upon its pricing formula. At the required entry, enter the amount with decimals. The remaining price levels fill in automatically. Defaults to all required fields.	Escalator #
9	I	Price 1		Should contain a period.	
10	J	Price 2		Should contain a period.	
11	K	Price 3		Should contain a period.	
12	L	Price 4		Should contain a period.	
13	M	Price 5		Should contain a period.	
14	N	Step Nbrs	N	Enter the job steps that make up this labor code. The time and description of this labor code automatically fill in. After a step sequence and subsequent step code are entered, the computer compares the time between the labor code and job steps. If the standard time entered does not equal the total time of all the job steps entered, the computer asks for verification update. The time can be adjusted.	Job Step #

- A ‘\` in any field clears the field.

Chapter 5 Import Mailers

<u>#</u>	<u>Column</u>	<u>Field</u>	<u>Required</u>	<u>Description</u>	<u>Format</u>
1	A	Type	Y	Type of import item must be "M".	
2	B	Name	Y	Enter the name of the customer.	
3	C	Address 1	Y	Enter the first line of the customer's mailing address.	
4	D	Address 2	N	Enter the second line of the customer's mailing address (if applicable).	
5	E	City	Y	Enter the customer's city.	
6	F	State	Y	Enter the customer's standard two letter state/province abbr. (Note if the customer's country is a country that is setup not to have states this is not a required field).	XX
7	G	Zip	Y	Enter the customer's zip code or zip+4 code without the dash. The zip code must be valid for the country selected.	#####, #####
8	H	Country	N	Enter the customer's country. If left blank defaults to "USA".	USA
9	I	Phone	N	Enter the customer's phone number without slashes or dashes. They will be automatically inserted.	#####
10	J	Fax	N	Enter the vendor's fax number without slashes or dashes. They will be automatically inserted.	#####
11	K	Contact	N	Enter the name of the contact(s) for the customer. List of contacts comma separated.	
12	L	Group	N	Enter a valid customer group from the Code Description 'MR' file.	
13	M	Comments	N	Enter comments, separated with a comma.	

- After creating the spreadsheet in the above format, save as a CSV format and transfer to your Polaris system placing the records in the IMPORT file. Then run the process IMPORT.MA.

Chapter 6 Import Vendors/Sub Vendors

<u>#</u>	<u>Column</u>	<u>Field</u>	<u>Required</u>	<u>Description</u>	<u>Format</u>
1	A	Type		Must enter "V".	
2	B	Vendor	Y	Enter a three-character vendor code.	XXX
3	C	Subvendor	N	If this vendor has sub vendors, enter the sub vendor code.	#
4	D	Name	Y	Enter the vendor's (product line or manufacturer) complete name. If you are entering a sub-vendor, then indicate the classification of the product.	Bosch Fuel Injectors or Bosch Rebuilt Pumps
5	E	Address line 1	N	Enter the vendor's address, if you buy direct.	
6	F	Address line 2	N	Enter street address first and PO Box numbers secondly.	
7	G	City	N	Enter the vendor's city.	
8	H	State	Y	Enter the vendor's two-letter state abbreviation. Should be a valid state for the country entered above.	XX
9	I	Zip	Y	Enter the vendor's zip code or zip+4 code without the dash. The zip code must be valid for the country selected.	#####, #####
10	J	Country	Y	Enter the country if not USA. The system defaults to 'USA'.	USA
11	K	Phone Nbr	N	Enter the vendor's phone number without slashes or dashes. They will be automatically inserted.	#####
12	L	Fax Nbr	N	Enter the vendor's fax number without slashes or dashes. They will be automatically inserted.	#####
13	M	Contact	N	Enter the name of the contact(s) for the vendor. List of contacts comma separated.	

14	N	Escalator	N	Enter the escalator number used for this vendor. If you enter an escalator number, then when adding new items into inventory, this pricing formula will be used to calculate the prices automatically. This promotes pricing consistency throughout the product line.	
15	O	Ship Via		Enter the shipping method that will be used to deliver the merchandise contained on this invoice. This does not have to be a valid ship via from your code description file. The Ship Via displays in the Order Entry header section on the screen.	Ex. UPS or Truck
16	P	Billing Terms	N	Enter this vendor's usual billing terms. Use the terms codes from your code descriptions 'IT' file.	Ex. NET30 or NET10
17	Q	Freight Terms	N	Enter this vendor's usual freight terms.	Ex: Prepaid or COD
18	R	PPD Freight	N	Enter the minimum dollar amount of each purchase order that qualifies for prepaid freight. Enter this as a whole number.	'\$1000' is entered as '1000'
19	S	Percent Off	Y	Enter the percentage off list price you qualify for when buying from this vendor. During purchase ordering, this percentage displays on the purchase order screen to advise you of your additional discount allowed.	0 - 99
20	T	Books Close	Y	Enter the day of the month the books close for this vendor/product line.	0 - 31
21	U	Day Due	Y	Enter the day of the month that billing becomes due for this vendor.	0 - 29
22	V	Discount	N	Enter the discount percentage this vendor allows on purchase orders.	0 - 99

23	W	Billing Period	Y	Enter the number of days, 0-200, for this vendor's billing period. Default value is loaded with 'M'onth.	0 - 200 or M
24	X	Exclude from Lists	Y	Polaris creates and automatically maintains a select list of inventory items with this vendor code that can be used in Automatic Purchase Ordering. (See Inventory Presorting Menu) Using pre-selected lists reduces the workload on the system resources and may noticeably improve performance. If you do not wish to have the system automatically generate a list for this vendor code, enter 'Y'es, otherwise enter 'N'o.	Y or N
25	Y	Include Sp Chgs	Y	Do you wish to include special charges cost on purchase orders for this vendor? (Example: core charges or freight charges) If so, any special charge costs assigned to this vendor's products are included in your purchase order total dollar amount. If you wish to add special charge costs to purchase orders, enter 'Y'es. Otherwise, enter 'N'o.	Y or N
26	Z	Single PO	Y	During automatic purchase order creation (PO.CREATE), do you need only one PO generated for this vendor, regardless of how many sub-vendor codes are contained within this vendor. 'Y'es produces one purchase order for this vendor containing all sub-vendor codes. 'N'o generates a separate purchase order for each sub-vendor contained within this vendor. This field pertains only to main vendors.	Y or N
27	AA	Transnet ID	N	Enter the vendor's Transnet identification number.	
28	AB	Notes	N	Enter any notes for this vendor	
29	AC	PO Required	N	Default is N. If a PO is required, change to "Y"	Y or N
30	AD	Remit Flag	N	Default is "N". If a remittance statement is required, change to "Y".	Y or N

- All fields are updated as they would be through Vendor Maintenance.
- If an item is already on file it will replace only the items that were defined in the transfer, with the exception of notes and contacts. These will always be appended to the existing data in the fields.

/		IMPORT.AP.SUPP	27
/IMPORT.PARTS	20	IMPORT.CM	31
		IMPORT.MA	34
;		Inserting decimals in prices	15
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