The New Class Structure
Using the Class Import Template

The purpose of this template is to make sure that any new client class structure you send to Management One includes all required information, presented in a uniform way.

STEP 1: ENABLING MACROS

When you first open the Class Import Template, Excel should alert you to the presence of Macros. Macros are bits of code that help Excel perform automated tasks.

You must click "Enable Content" (on a PC) or "Enable Macros" (on a Mac) in order for the file to work.

If you do not see this prompt, or if this is the first time you've used an Excel workbook with Macros, you may need to enable them within Excel's program settings first. To do this:

1. Open Excel to a new blank workbook.
2. **On a PC:** Go to the "File" tab and click on "Options".
   On a Mac: Go to the menu named "Excel" (next to the Apple icon) and click "Preferences."
3. **On a PC:** Click on "Trust Center" and then "Trust Center Settings"
   On a Mac: Click on "Security."
4. **On a PC:** Click "Macro Settings," then check the box marked "Enable all macros," as well as the box marked "Trust Access to the VBA project object model".
   On a Mac: Check the box marked "Enable all macros," as well as the box marked "Trust Access to the VBA project object model".
5. Click "Ok" to close the Trust Center, and then click "Ok" to close the options window.
6. Close all instances of Excel.

With macros enabled, we are ready to begin!

ON A PC

ON A MAC

ManagementONE™

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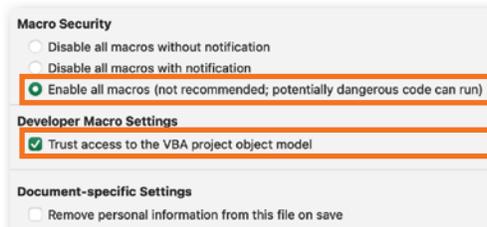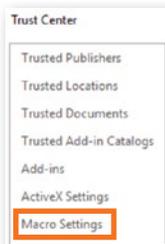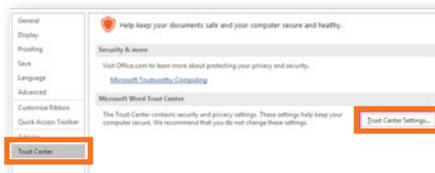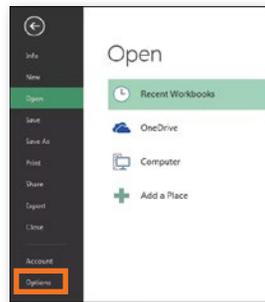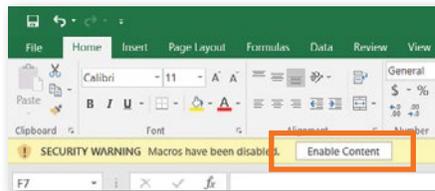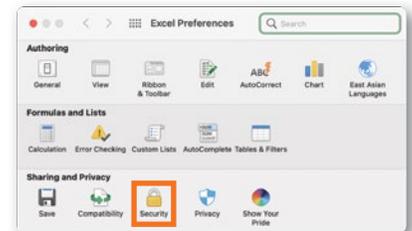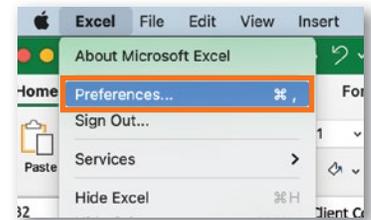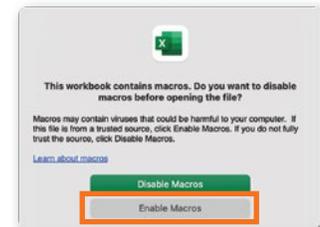
GOING STEP BY STEP

1. Click "Start Wizard"

2. Enter a new client code and click "Next". *Every client must have a unique code, and this code should match the code you entered on the first screen of the setup on Retail ORBIT™.*

3. Enter each location, along with a unique location code for each, and click "Next."

4. Paste all categories, one for each cell, into the column marked "Class Category" and click "Next."

5. Paste all classes and child classes, along with their codes, into the appropriate columns.

6. Select a service type for each class and child class.

7. For all parent classes, add the relevant category to the "Class Category" column.

8. For all child classes, add the class number for the parent class to the "Parent Class" column
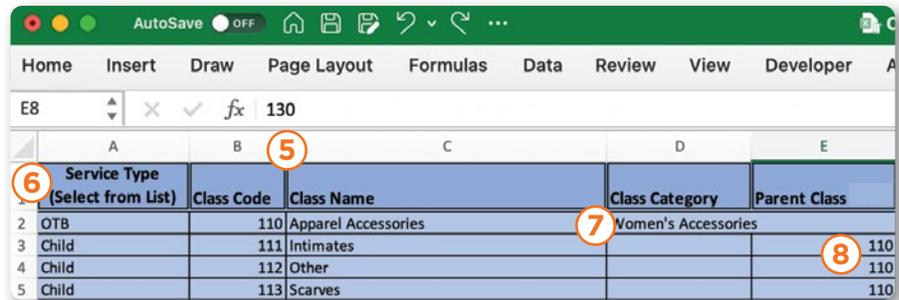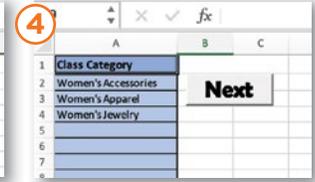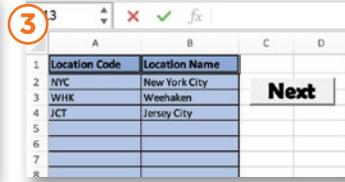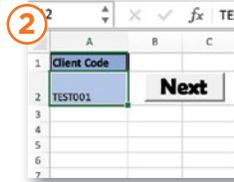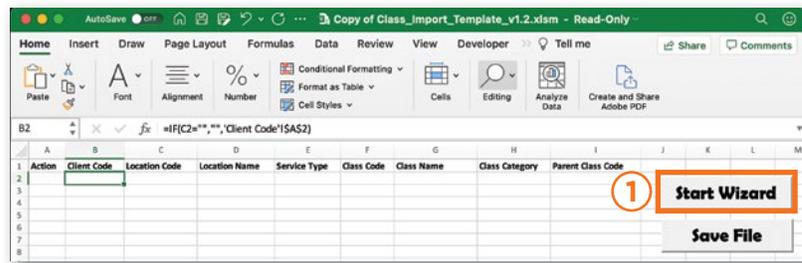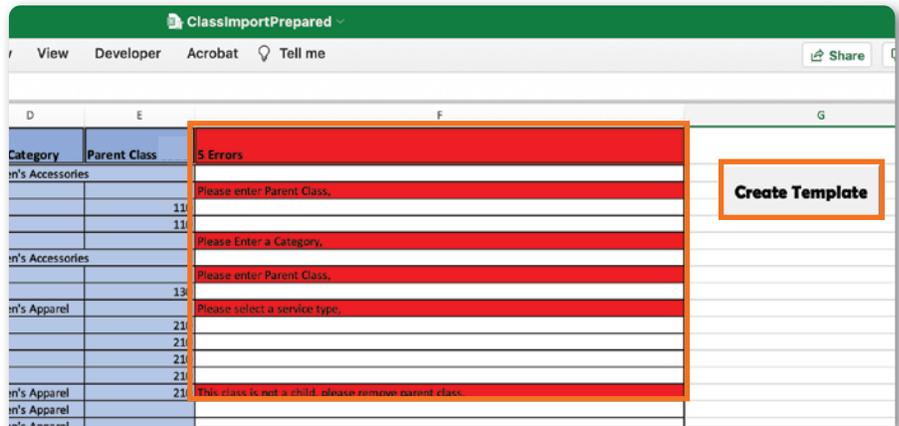
SEEING RED

The power of this template lies in its ability to spot problems with the class structure data automatically. **The errors are clearly stated, and will disappear once you've corrected them.**

A red error warning will appear to let you know when:

- A parent or child class is missing a class code
- A parent class is missing a category
- A child class is not marked "Child" under "Service Type"
- A child class is missing its own code or its parent class code
- A parent class has been placed inside a parent class
- A child class has been given a category

Once you're resolved all errors and your class structure is complete, click the "Create Template" button.

SAVE YOUR CLASS STRUCTURE!

You will now see your completed class structure, but **in order to upload it you must first click the "Save File" button.**

The file that results from this "Save File" step is now ready to be uploaded using step 2 of the setup wizard on Retail ORBIT.

IMPORTANT: Do not click "Create Template" until all errors are resolved.

If you aren't sure how to resolve an error, please contact customer support for assistance.