

6.0 TOWING ORDERS IMPORT SET-UP / EBOOM

6.1

Towing Orders Import has a set-up procedure and a day-to-day operation phase. This document explains the set-up procedure.

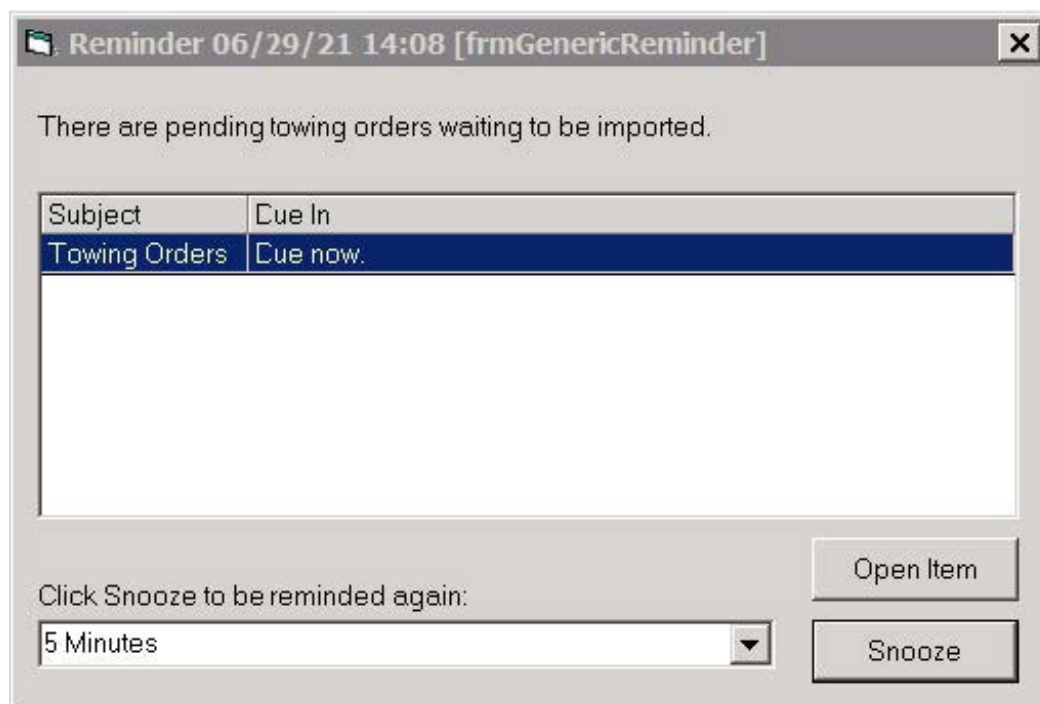
A. Accessing Towing Orders

1. TugAssist accepts Towing Order imports from customers. If a Towing Order is waiting, a "Reminder" dialog pop-up will prompt a pending towing orders import.

When the Import Reminder pop-up appears, you can choose to proceed, by clicking <Open Item>, which will open the customer set-up screen.

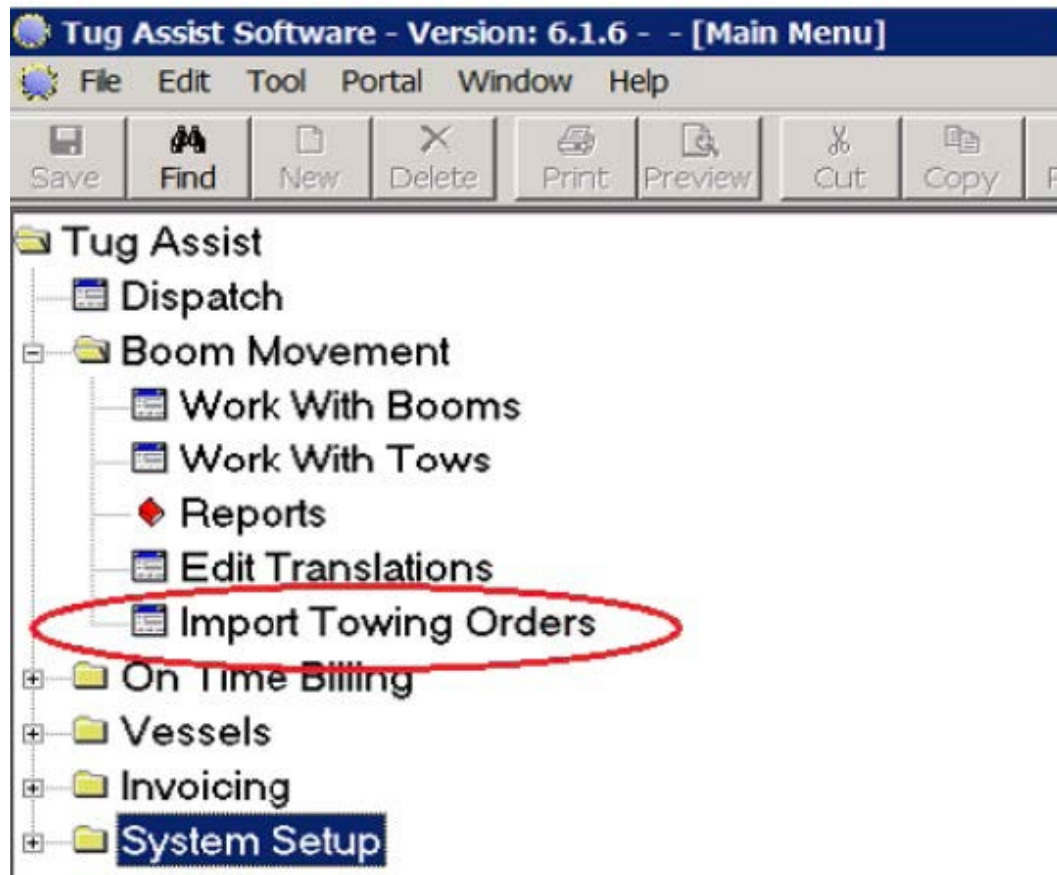
Alternatively, click <Snooze> to push the task for a later time.

Fig 1. Towing Order Import Reminder pop-up



2. To start the Towing Order import without waiting for the Reminder prompt, choose <Boom Movement>, then click <Import Towing Orders>.

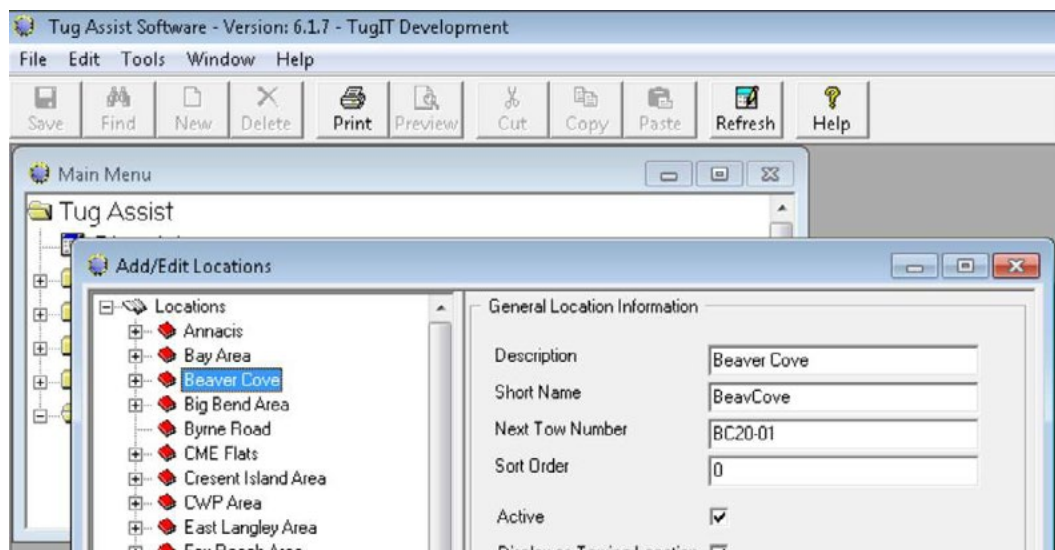
Fig 2. Find the <Import Towing Orders> menu option under <Boom Movement>



3. After you have selected <Open Item> in Step One or clicked on <Import Towing Orders> in Step Two, the Customer screen, which is one of five “translation screens” will appear to start the Towing Order import process.

If there is no new data, click <Save All> to proceed.

Fig. 3. The first screen of the Towing Order Import wizard shows Customers. All rows are blue, which means there is no new data.



Note: If there is new data in the cells, the row will appear white instead of blue, and this new data needs to be acknowledged. See next section.

B. Dealing with previously unseen data using Translation Screens

1. When new information is provided by the customer, the Towing Order import process will provide one or more translation screens (in the form of pop-ups): Customer, Locations, Billing Types, Release Status, or Species information.

These then have to be matched/acknowledged with names that exist in your TugAssist in the dropdown menu.

Note: If there is new information that has not yet been entered in your TA, you have to add this so it will appear in the dropdown menu. For example, go to the Customer Set-up screen to add new customer name (see Customer Set-up document).

After you click <Save all> in in Fig 3 (previous section), there are two possibilities:

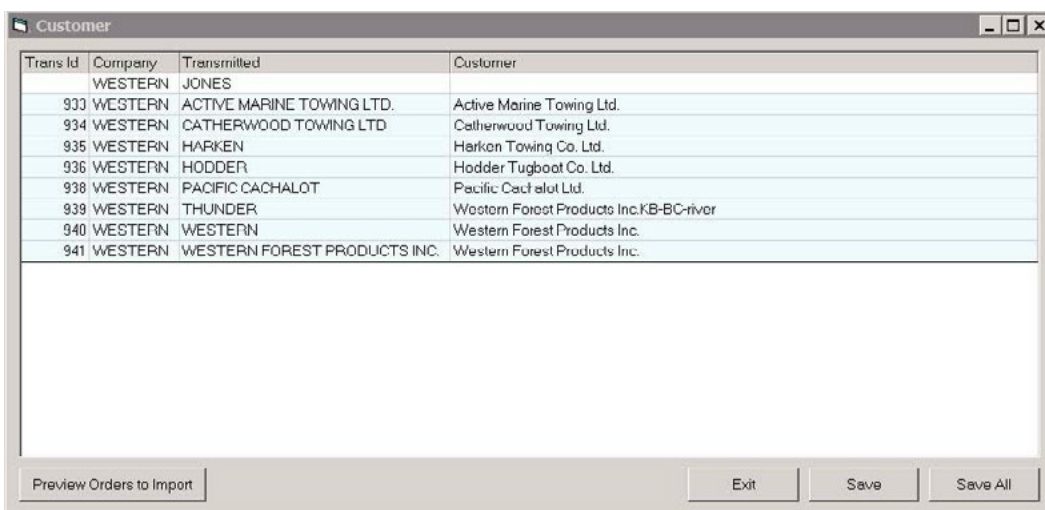
1. Import process/operation will start (or)
 2. Continue with further set-up screens/steps (Tow Order Import Wizard).
2. There are 5 possible translation screens: Customer, Locations, Billing Types, Release Status, and Specie.

The Customer screen always appears first, even if there is no new customer data. You can click <Save> to click through the screens or click <Save all> to skip to the screens with new data.

In there is new data, the row will appear white, and you will have to enter/match this new data from a name in your TugAssist database.

Fig 4. The first screen of the Towing Order Import wizard always shows customers; a white row indicates “new customer”.

Fig 4. The first screen of the Towing Order Import wizard always shows customers; a white row indicates “new customer”.



3. To add a new customer, in the Tow Order Import wizard, click the empty white cell and then select matching customer in the “Customer” drop down that appears. Then click <Save all>.

Fig 5. Adding a new customer in the Tow Order Import wizard.

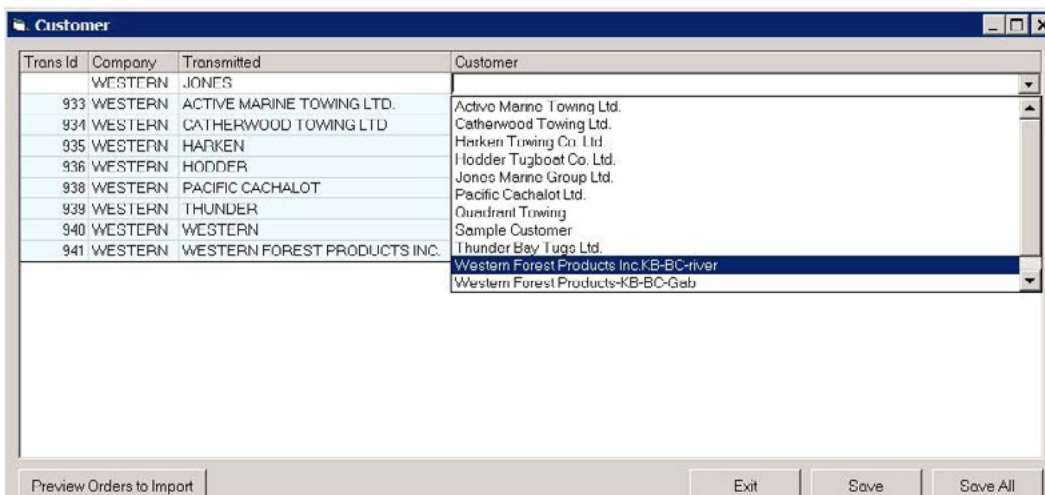
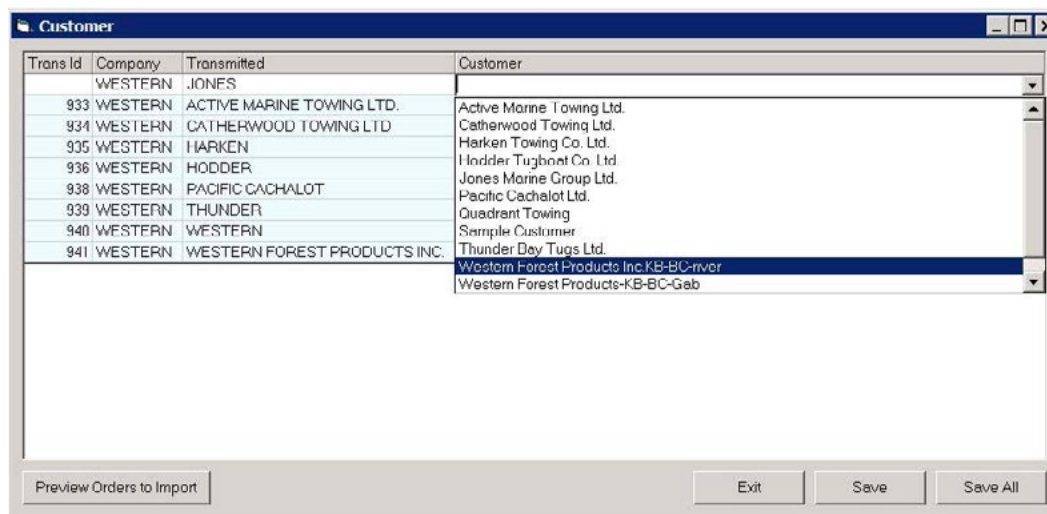


Fig 5. Adding a new customer in the Tow Order Import wizard.



4. The Location translation screen will follow if there are new tow destinations (Locations).

Click <Location> cell and match the term your company uses for the customer-entered information.

Fig. 4. Location translation screen with new location (in white)

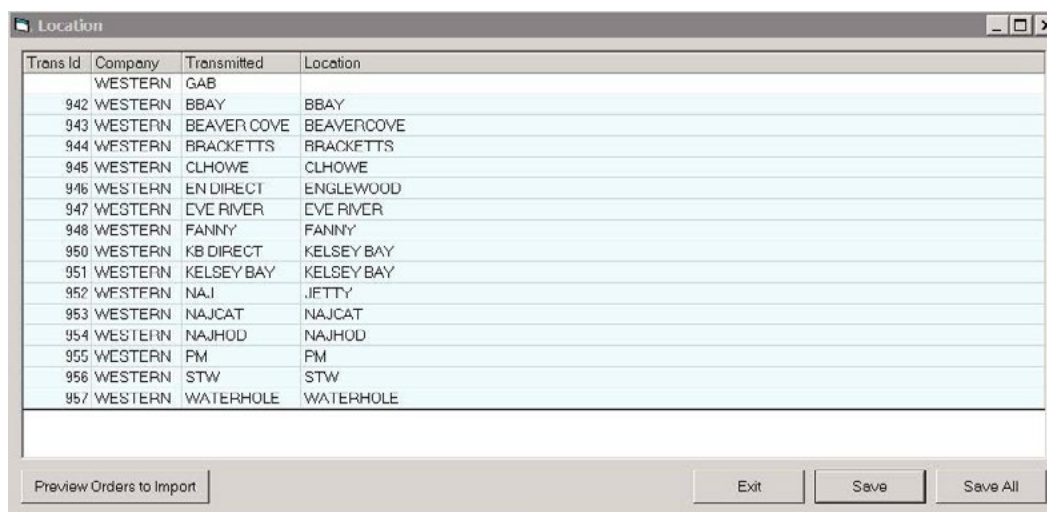


Fig 5. Location translation screen with all rows populated after being selected.

Location			
Trans Id	Company	Transmitted	Location
	WESTERN	BBAY	BBAY
	WESTERN	BEAVER COVE	BEAVERCOVE
	WESTERN	BRACKETTS	BRACKETTS
	WESTERN	EN DIRECT	ENGLEWOOD
	WESTERN	GAB	GAB
	WESTERN	KB DIRECT	KELSEY BAY
	WESTERN	KELSEY BAY	KELSEY BAY
	WESTERN	NAJ	JETTY
	WESTERN	NAJCAT	NAJCAT
	WESTERN	NAJHOD	NAJHOD
	WESTERN	PM	PM
	WESTERN	STW	STAFFORD

5. Once setup is complete, it is unlikely that you will see another “Billing Types” or “Release Status” translation screen.

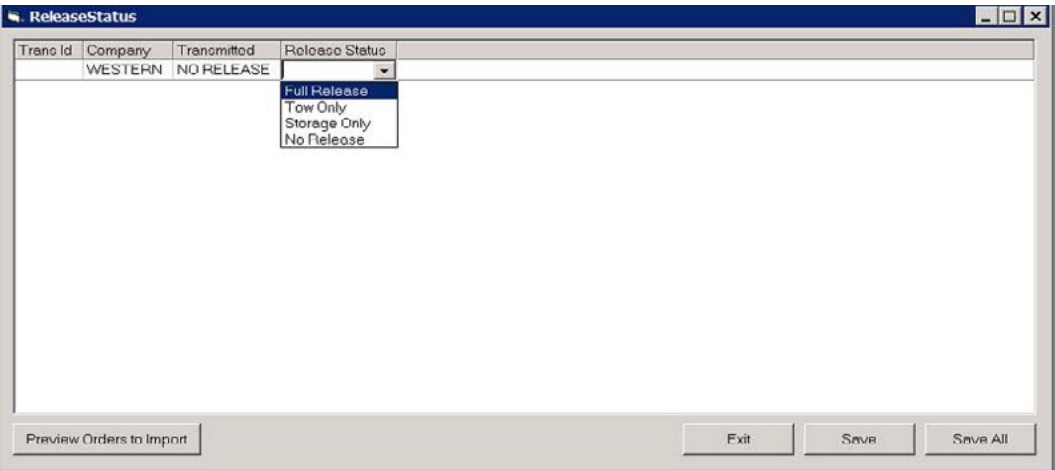
Fig 6. Translation for “Per Section Bundle” billing type for a customer

Trans Id	Company	Transmitted	Billing Type
	WESTERN	PER_SEC_BUNDLE	BS FBM Hourly M3 N/A Sec-Bndl Sec-BS Sec-Flat

Preview Orders to Import

Exit Save Save All

Fig 7. Translation for “No Release” status for a customer



6. Occasionally, a customer “Boom type”, which includes Specie information, will pop-up.

Depending on the customer, the Specie Identification is likely a digit in the Transmitted code. For example, code 130, can be translated to Specie “FIR”.

Fig 8. Translation for Boom Type codes, for a customer

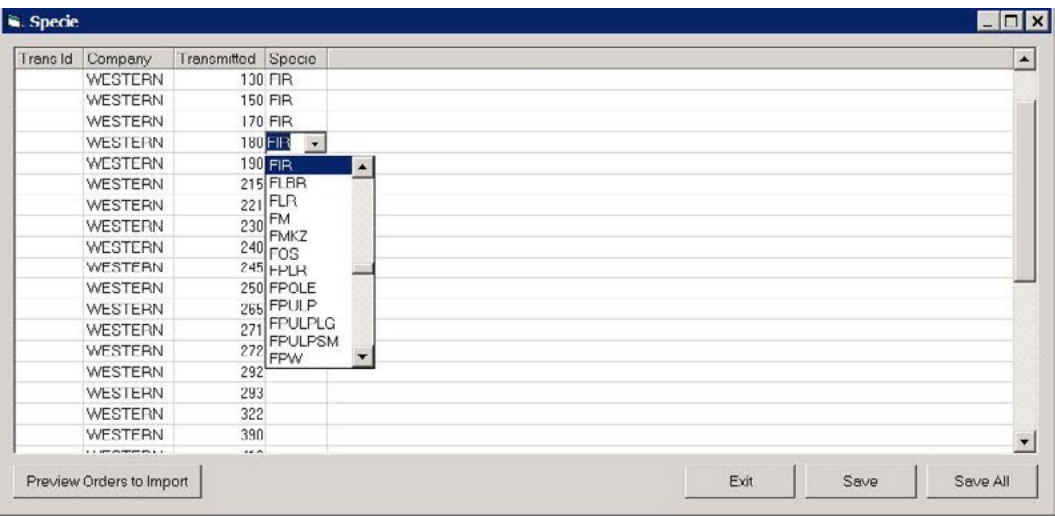
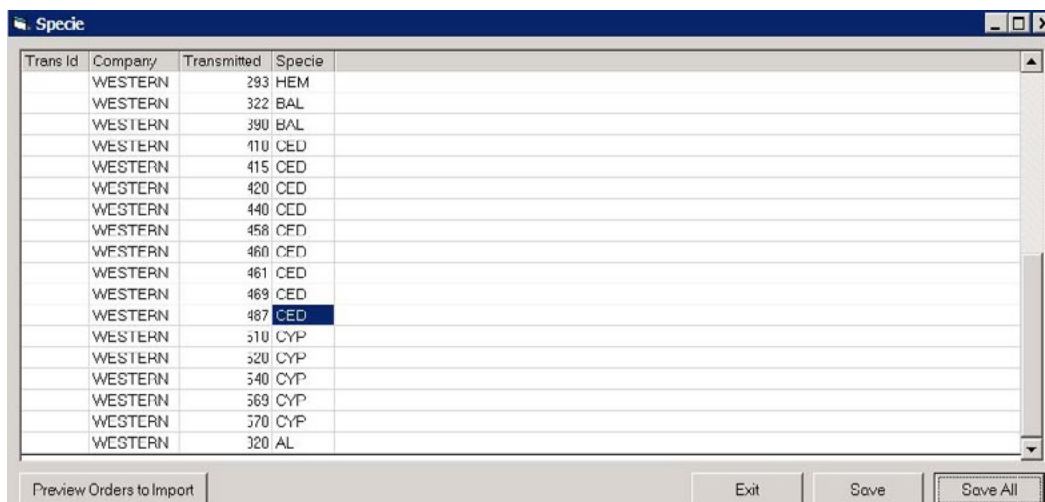


Fig 9. Sample Specie digit and possible Specie name (when they set up their species)

WESTERN	NAME - GUESS
1	FIR
2	HEM
3	BALSAM
4	CEDAR
5	CYPRESS
6	SPRUCE
8	ALDER
MSB	

Fig 10. Specie translation screen with all rows populated.

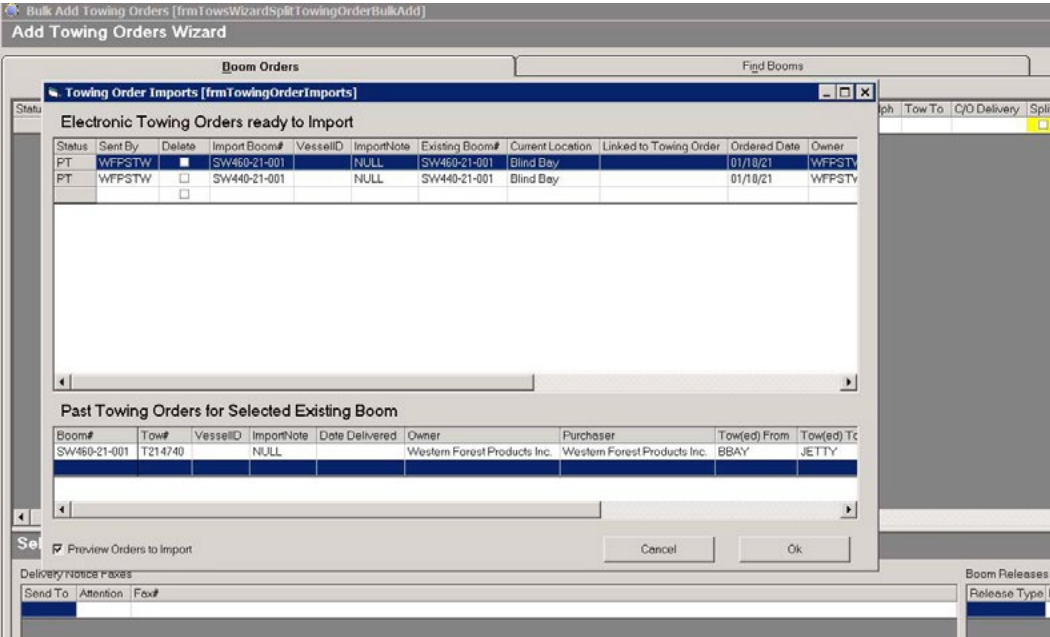


Trans Id	Company	Transmitted	Specie
	WESTERN	293	HEM
	WESTERN	322	BAL
	WESTERN	390	BAL
	WESTERN	410	CED
	WESTERN	415	CED
	WESTERN	420	CED
	WESTERN	440	CED
	WESTERN	458	CED
	WESTERN	460	CED
	WESTERN	461	CED
	WESTERN	469	CED
	WESTERN	487	CED
	WESTERN	510	CYP
	WESTERN	520	CYP
	WESTERN	340	CYP
	WESTERN	369	CYP
	WESTERN	370	CYP
	WESTERN	320	AL

End of document.

7. After clicking the <Save All> button on the final translation screen, the Tow Order Import wizard completes steps and loads the “Towing Order Imports” screen, which is part of the normal day-to-day operation of TugAssist.

Fig 11. The Towing Order Imports screen (Bulk Add Towing Orders)



End of document.