




TRANSFLO \$Velocity(TM) 2.0 Online Help

TRANSFLO \$Velocity(TM) 2.0

TRANSFLO \$Velocity (TM) 2.0 Online Help. This online help contains step-by step instructions for scanning documents.

The structure of the TRANSFLO \$Velocity(TM) 2.0

-  [The Registration Window](#)
-  [Main Window](#)
-  [Previously Submitted Documents](#)

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TRANSFLO \$Velocity(TM) 2.0 Online Help

The Registration Window

In order to use TRANSFLO \$Velocity(TM) you must first enter registration information in the [User Registration Window](#). This window launches as part of the initial setup and can also be accessed by clicking on the [F12] Setup & Administration button and then on the [F2] Register User button on the [Main Window](#).

The structure of the The Registration Window

-  [User Registration](#)

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TRANSFLO \$Velocity(TM) 2.0 Online Help

User Registration

1 Enter Broker ID and click Add

2 Broker List

3 Company Name

4 Motor Carrier Code (MCC)

7 Street Address Line 1

8 Street Address Line 2

9 City

13 Email Address

14 Re-enter Email Address

5 First Name

6 Last Name

10 State

11 Zip Code

12 Phone Number

15 Submit button

16 Cancel button

The screenshot shows a window titled "TRANSFLO \$Velocity™ - User Registration". It contains a section for "Add a Broker" with a text box for "Enter a Broker ID and click Add:" and a table with columns "Default", "Broker ID", and "Description". The table lists two brokers: "BROKER01 MYCOMPANY BROKER 01" (checked) and "BROKER02 MYCOMPANY BROKER 02" (unchecked). Below the table are "Add" and "Remove" buttons. The main section is "My Company Information (Billing Department Contact)" with a note "Press the TAB key to navigate through fields." It includes fields for "Company Name" (MyCompany), "Motor Carrier Code (MCC)" (USDOT-99999), "First Name" (John), "Last Name" (Smith), "Street Address Line 1" (123 Anystreet Dr.), "Street Address Line 2", "City" (Mytown), "State" (FL), "Zip Code" (33607), and "Phone Number" ((813)555-1212). There are also "Email Address" (myname@myemail.com) and "Re-enter Email Address" (myname@myemail.com) fields. At the bottom are "Submit" and "Cancel" buttons. A note at the bottom states: "All fields except Street Address Line 2 are required. Please review information for accuracy and click submit."

In order to use the TRANSFLO \$Velocity(TM) program, you must first enter registration information in the *User Registration* Window.

1 Enter Broker ID and click Add

Enter a Broker ID and click Add:

Enter your Broker ID in the *Enter a Broker ID and click Add* text box, and click the Add button. The Broker ID is entered in the *Broker ID* column of your Broker list. Repeat this until all of your Brokers have been added. Click on the check box to the left of the Broker ID that you wish to be the default Broker ID in your Broker selection list.

Note: If you wish to remove a Broker from the list, click on it and then click on the Remove button.

2 Broker List

Default	Broker ID	Description
<input checked="" type="checkbox"/>	BROKER01	MYCOMPANY BROKER 01
<input type="checkbox"/>	BROKER02	MYCOMPANY BROKER 02

This is the list of Brokers that you create by entering Broker ID's in the *Enter Broker ID and click Add* text box. Once the registration process is completed the Broker Descriptions will display in the *Description* column.

Note: You will be notified if you entered an invalid Broker ID the first time you start TRANSFLO \$Velocity(TM).

3 Company Name

Company Name

Enter your company's name in the *Company Name* box.

4 Motor Carrier Code (MCC)

Motor Carrier Code (MCC)

Enter your Motor Carrier ID (USDOT number) in the *Motor Carrier Code (MCC)* box.

5 First Name

First Name

Enter your first name in the *First Name* box.

6 Last Name

Last Name

Enter your last name in the *Last Name* box.

7 Street Address Line 1

Street Address Line 1

Enter the first line of your street address in the *Street Address Line 1* box.

8 Street Address Line 2

Street Address Line 2

Enter the second line of your street address in the *Street Address Line 2* box.

9 City

City

Type your City in the *City* box.

10 State

State

Enter your State in the *State* box.

11 Zip Code

Enter your Zip code in the *Zip Code* box.

12 Phone Number

Enter your phone number including area code in the *Phone Number* box.

13 Email Address

Enter your Email address in the *Email Address* box.

Important: This must be a valid email address that you have access to. An activation email will be sent to this email address with a link that you must click in order to activate TRANSFLO \$Velocity(TM). You will not be able to use the TRANSFLO \$Velocity(TM) program until you click on the registration email link. Please add the email address "tfxhelp@transflo.com" to your email safe senders list. If you do not receive a confirmation email, be sure to check your Junk Mail folder.

14 Re-enter Email Address

Re-enter your Email address in the *Re-enter Email Address* box.

15 Submit button

Once you have finished entering your registration information click on the Submit button. If you are connected to the Internet, your registration information will be sent immediately. If not, your registration information will be sent the next time you connect to the Internet. Once you click on the Submit button the registration window will close.

Note: In order to use the TRANSFLO \$Velocity(TM) program you must submit your registration information and you must connect to the Internet. You must then click on the registration link in the body of your registration email that will be sent automatically to the email address that you entered in above.

16 Cancel button

Clicking on the Cancel button will terminate the registration process and all of your registration information will be lost.

Main Window

This topic covers details on how to scan pages in the TRANSFLO \$Velocity(TM) program once you have successfully followed the Registration Process.

Getting Organized

Before you start scanning,

1. Assemble all of your documents in the order that you want to scan them.
2. If any document is smaller than letter size either tape it to a blank 8 ½ x 11 sheet of paper or photo-copy it onto an 8 ½ x 11 sheet. (A photo-copy is less likely to get jammed if you are using a multi-page scanner)
3. Start the TRANSFLO \$Velocity(TM) program.

The Batch Creation Process

When you scan a set of Documents, add Documents from folders on your computer, and submit them, you have created a Batch. The Batch creation process involves 4 steps:


1. [Add Documents](#).
2. [Selecting a Broker](#). If the Broker requires Batch information, you will enter it at this time. This is known as *Batch Level Indexing*.
3. [Reviewing the Documents](#). If the Broker you selected requires that you enter document types for each Document Type, you will enter these at this time. This is known as *Document Level Indexing* or *Document Typing*.
4. [Submitting the Batch](#).

Begin Batch Creation

To start the Batch creation process,

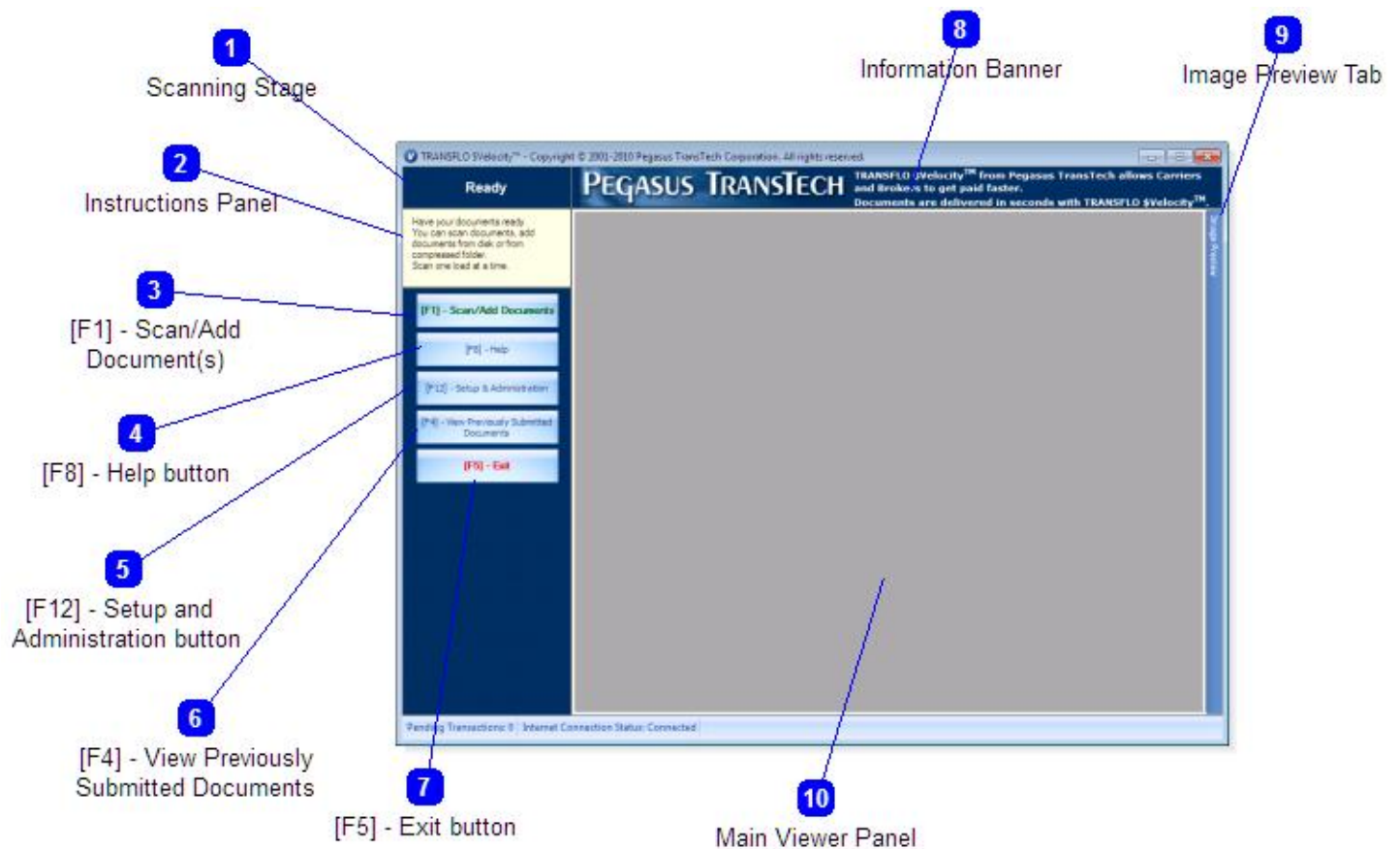
1. Place pages in the scanner's tray or, if you are using a flat bed scanner, place the first page face down on the scanner bed.
2. Click the [F1] - Add Documents button. The scanner software will begin scanning the document (s).

The structure of the Main Window

-  [Initial Window](#)
-  [Add Documents](#)
-  [Adding Documents](#)
-  [Broker Selection - Document Indexing only](#)
-  [Broker Selection - Document and Batch Indexing required](#)
-  [Document Type Indexing](#)

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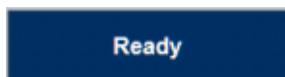
Initial Window



When you first start the TRANSFLO \$Velocity(TM) program this window opens, indicating you are ready to scan.

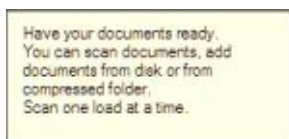
Note: Pressing the corresponding function keys on your keyboard performs the same actions described for the buttons.

1 Scanning Stage



The *Scanning Stage* information area tells you what stage of the Batch creation process you are in.

2 Instructions Panel



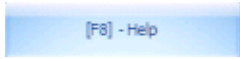
The *Instructions Panel* gives you details on what to do next.

3 [F1] - Scan/Add Document(s)



Click the [F1] - Scan/Add Document(s) button to add Documents to your Batch.

4 [F8] - Help button



The [F8] - Help button opens the interactive help that you are currently using.

5 [F12] - Setup and Administration button



The Setup & Administration button gives you the ability to customize the TRANSFLO \$Velocity (TM) program to your needs. The options that are available for Administration are:

1. Update your registration information
2. Select a scanner if you use more than one scanner.

6 [F4] - View Previously Submitted Documents



The [F4] - View Previously Submitted Documents button opens the Scanned Documents History window. This window allows you to review previously scanned Documents and verify that they have been submitted successfully.

7 [F5] - Exit button



The [F5] - Exit button closes the TRANSFLO \$Velocity(TM) program.

8 Information Banner



The *Information Banner* provides news and information about this and other programs available from Pegasus TransTech.

9 Image Preview Tab



Thumbnails of the images in the Batch can be viewed by positioning your mouse pointer over the *Image Preview* tab. This expands the *Image Preview Panel*. To keep the *Image Preview Panel* open click the pin icon. Clicking the pin icon again collapses the Image Preview Panel.

10 Main Viewer Panel

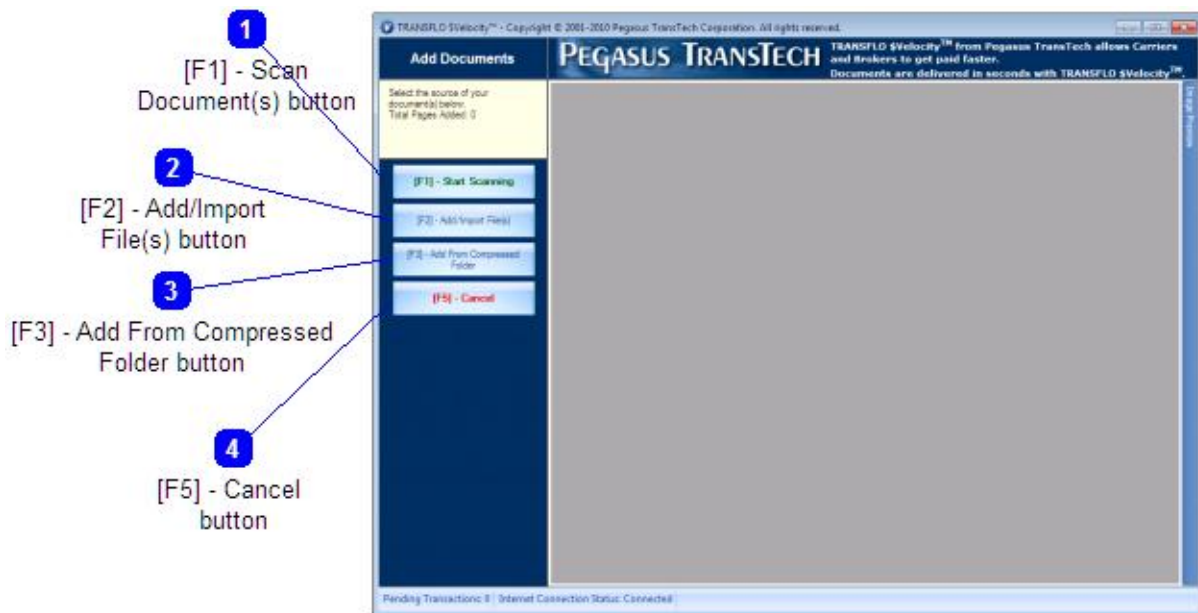


The *Main Viewer* is where the images of the documents will be displayed.

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Add Documents




Once the documents are in the loading tray (or on the flat bed) of your scanner, click on the [F1] Start Scanning button.

1 [F1] - Scan Document(s) button

A rectangular button with a light blue gradient background and a thin border. The text "[F1] - Start Scanning" is centered in a dark blue font.

Click on the [F1] Start Scanning button to scan documents.

2 [F2] - Add/Import File(s) button

A rectangular button with a light blue gradient background and a thin border. The text "[F2] - Add/Import File(s)" is centered in a dark blue font.


Click the [F2]Add/Import Files button to add image files from your computer to the current Batch.

3 [F3] - Add From Compressed Folder button

A rectangular button with a light blue gradient background and a thin border. The text "[F3] - Add From Compressed Folder" is centered in a dark blue font.

Click the [F3] - Add From Compressed Folder button to add image files and XML data from a zip file on your computer to the current Batch.

4 [F5] - Cancel button

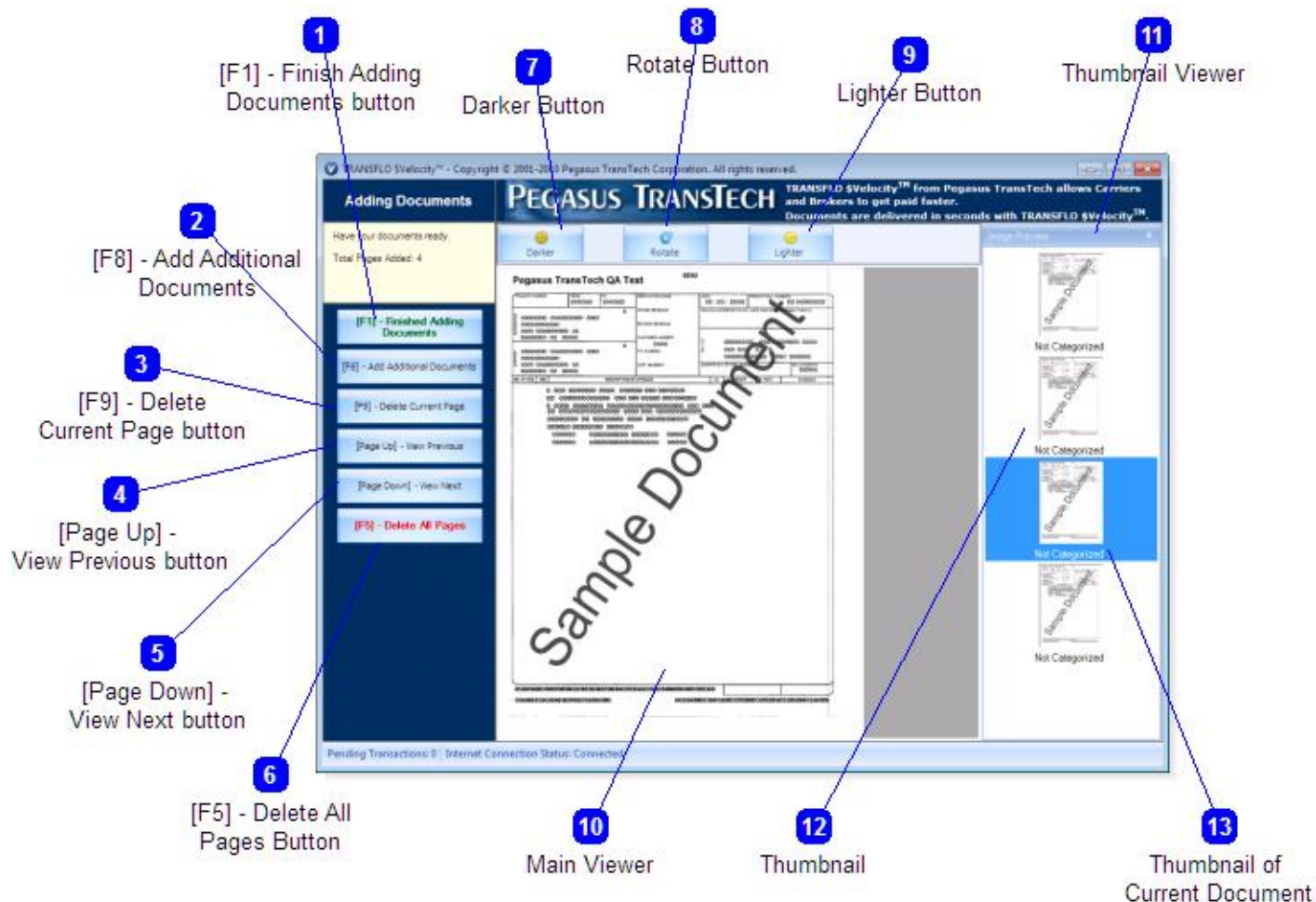
A rectangular button with a light blue gradient background and a thin border. The text "[F5] - Cancel" is centered in a red font.

Click the [F5] - Cancel button the Batch to cancel creation process.

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Adding Documents



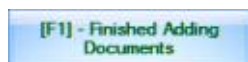
Once pages are scanned, the Thumbnail Viewer, also known as the Image Preview pane, shows thumbnails of the scanned pages. Pages can be,

1. added by clicking on the [F8] - Add Additional Documents button, or
2. deleted by clicking on the [F9] - Deleted Current Page button.

Scanned pages can be viewed in the Main Viewer,

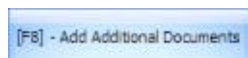
1. by clicking on the corresponding thumbnail in the *Image Preview* panel or
2. by navigating to the page with the [Page Up] - View Previous and the [Page Down] - View Next buttons.

1 [F1] - Finish Adding Documents button



Click on the [F1] - Finish Adding Documents button when you have finished scanning the documents. This will take you to the Broker Selection portion of the process.

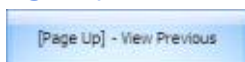
2 [F8] - Add Additional Documents



To add more pages to the batch, insert document(s) in the scanner and click the [F8] - Add Additional Documents button.

3 [F9] - Delete Current Page button

To remove a document from the Batch click on the [F9] - Delete Current Page button.

4 [Page Up] - View Previous button

To view the previous document in the Batch click on the [Page Up] - View Previous button.

5 [Page Down] - View Next button

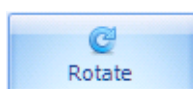
To view the next document in the Batch click on the [Page Down] - View Next button.

6 [F5] - Delete All Pages Button

To abort the Batch, click on the [F5] - Delete All Pages button.

7 Darker Button

To darken the page click the Darker button.

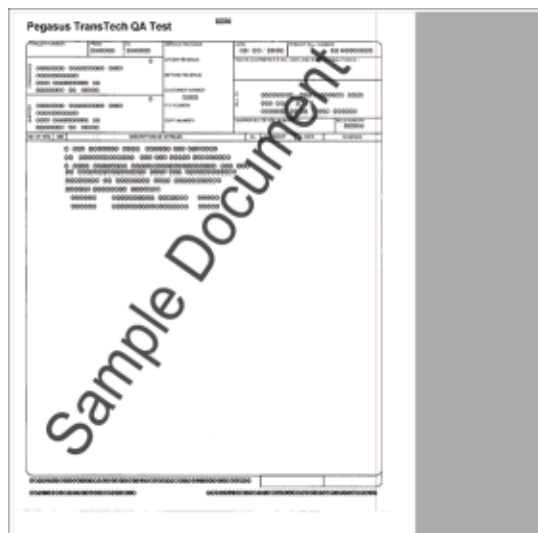
8 Rotate Button

To rotate the document 90 degrees clockwise click the Rotate button.

9 Lighter Button

To lighten the page click the Lighter button.

10 Main Viewer



The *Main Viewer* is where the images of the documents are displayed.

11 Thumbnail Viewer



Thumbnails of the images in the Batch can be viewed in the *Image Preview Panel*. This simplifies finding an image in the Batch.

12 Thumbnail



A Thumbnail is a small representation of the image in the *Image Preview* panel.

13 Thumbnail of Current Document

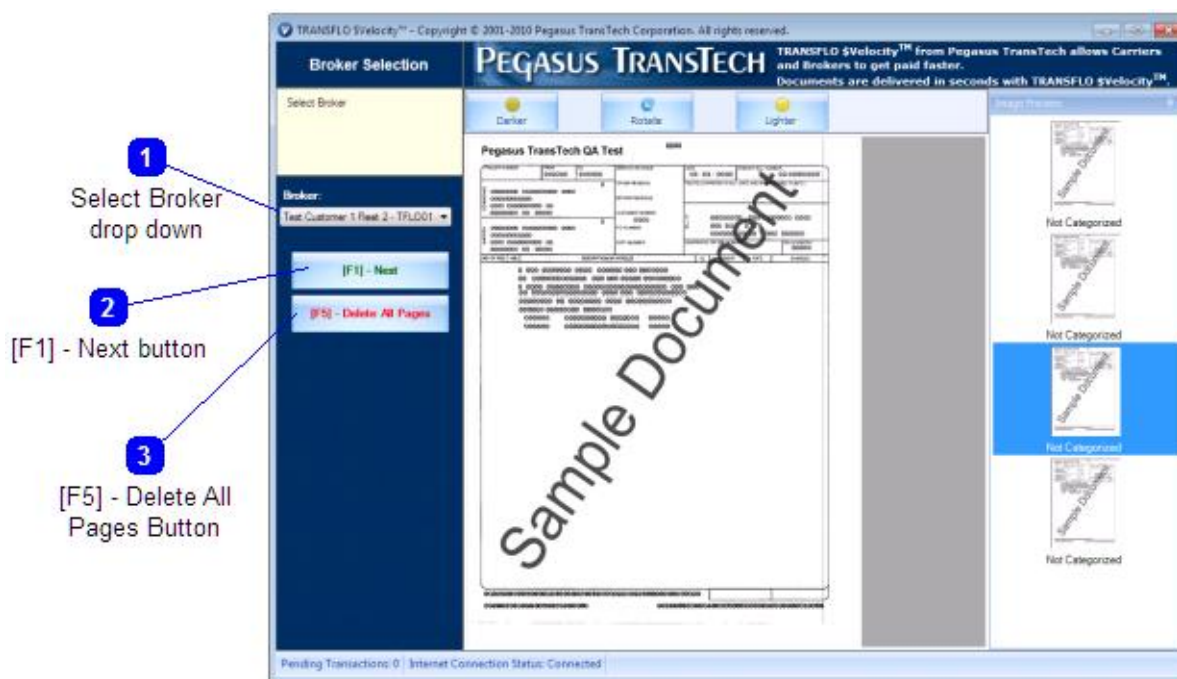


The document in the *Main Viewer* has the corresponding thumbnail in the *Image Preview* panel highlighted.

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Broker Selection - Document Indexing only

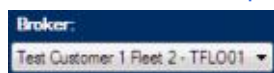


In this step the Broker is selected from the Broker drop down list. The following scenarios are possible:

1. If the Broker does not require any type of indexing the first button will have the caption [F1] - Next. Clicking on this button will close the batch and submit it.
2. If the Broker requires batch level indexing only the batch fields will display below the Broker drop down. Entering information in the required fields and clicking the [F1] - Next button will close the batch and submit it.
3. If the Broker requires *Document Level indexing only*, the Main Window will look just as it is shown below. Clicking on the [F1] - Next button takes you to the document indexing (document typing) portion of the transaction.
4. If the Broker requires *Document Level indexing* and Batch level index, the batch fields will display below the Broker drop down and the buttons will be labeled as shown below. You must enter data in the required batch fields and then clicking on the [F1] - Next button. This takes you to the

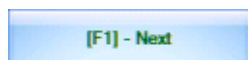
document indexing (document typing) portion of the transaction.

1 Select Broker drop down



Select a Broker from the Broker dropdown list.

2 [F1] - Next button



Click on the [F1] - Next button to continue to the Document Indexing step.

3 [F5] - Delete All Pages Button



The [F5] - Delete All Pages button will completely remove the Batch from the TRANSFLO \$Velocity(TM) program. *Use with caution.*

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Broker Selection - Document and Batch Indexing required

1 Broker Selection Drop Down

2 Batch Level Index Fields

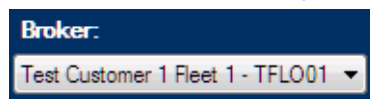
3 [F1] - Next button

4 [F5] - Delete All Pages Button

If the Broker requires Document Level indexing and Batch level indexing, the Batch fields will display below the Broker drop down and the buttons will be labeled as shown below. Required Batch fields

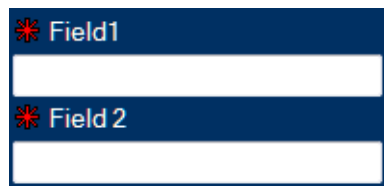
have red asterisks (*) before them. You must enter data in the required Batch fields and then clicking on the [F1] - Next button. This takes you to the document indexing (document typing) portion of the transaction.

1 Broker Selection Drop Down

A screenshot of a software interface showing a dropdown menu. The label 'Broker:' is at the top. The selected option is 'Test Customer 1 Fleet 1 - TFL001' with a small downward arrow on the right.

Select a Broker from the *Broker* drop down List.

2 Batch Level Index Fields

A screenshot of two input fields. The first field is labeled 'Field1' with a red asterisk to its left. The second field is labeled 'Field2' with a red asterisk to its left. Both fields are empty.

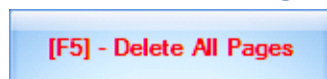
Type values in the Batch level index Fields boxes.

3 [F1] - Next button



When you have finished entering values for the Batch level fields click the [F1] - Next button.

4 [F5] - Delete All Pages Button

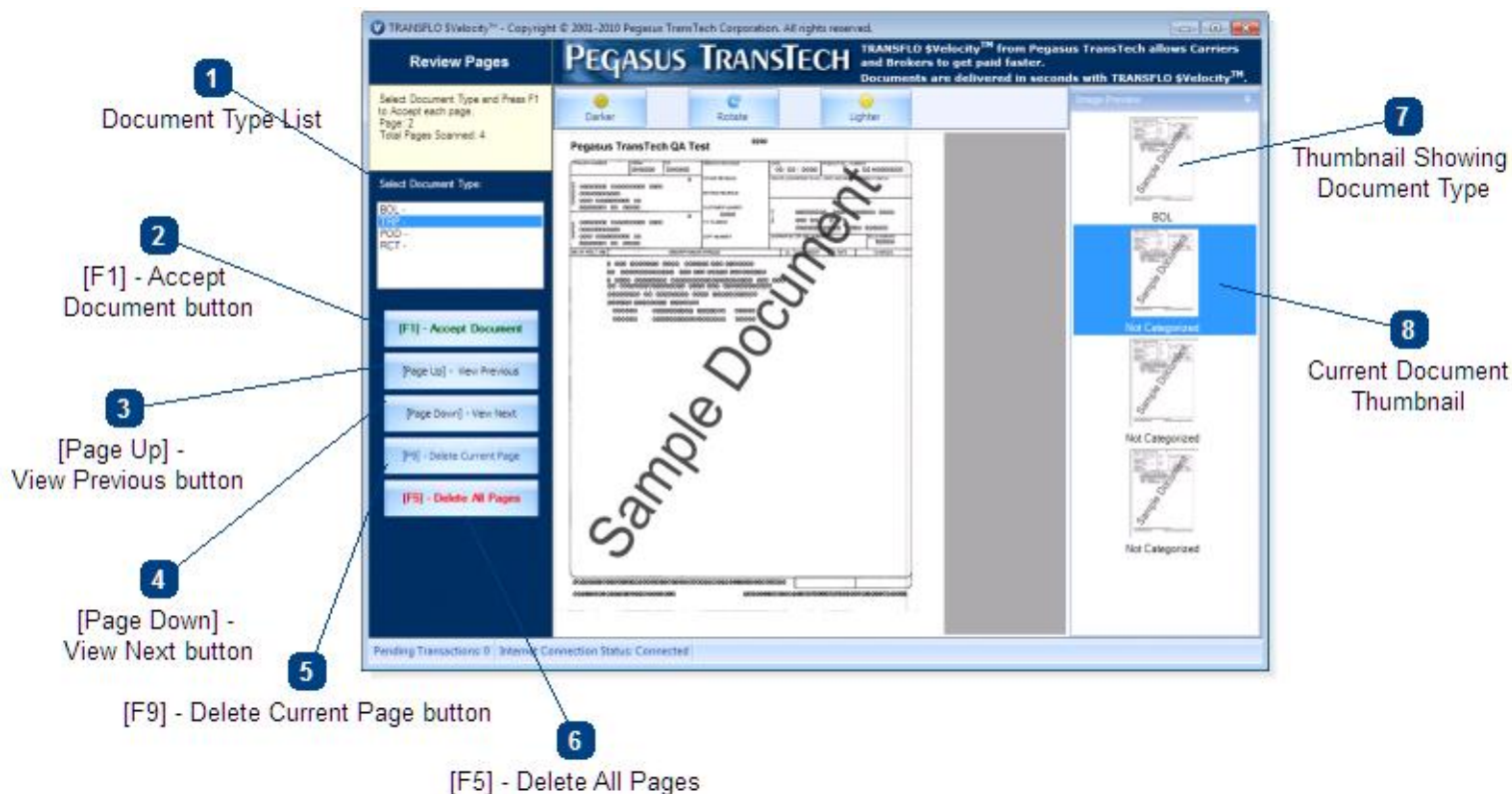


If you would like to start over click the [F5] - Delete All Pages button. This will completely remove the Batch from the TRANSFLO \$Velocity(TM) program. *Use with caution.*

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TRANSFLO \$Velocity(TM) 2.0 Online Help

Document Type Indexing



This screen print, illustrates the last 2 steps in the scanning process (steps 3 and 4):

3. Reviewing the Documents. If the Broker you selected requires that you enter Document Types for each Document, you will enter these at this time. This is known as *Document Level Indexing* or *Document Typing*.

4. Submitting the Batch.

This is accomplished by,

- Indexing the Documents by selecting a Document Type from the *Document Type* list and clicking the [F1] - Accept Document button. Repeat this until all of the documents have a Document Type.
- Once all of the Documents have been indexed and reviewed the first button changes to [F1] - Submit Batch. Click on this button and your batch will be transmitted. You will receive a *confirmation email*.


1 Document Type List

Select Document Type:

BOL -
TRP -
POD -
RCT -

The *Document Type List* list contains the Document Types available for the selected Broker. Click on one to select it.


2 [F1] - Accept Document button



[F1] - Accept Document

Click on the [F1] - Accept Document button to tie the Document Type to the document. This takes you to the next Document in the Batch.


3 [Page Up] - View Previous button



[Page Up] - View Previous

The [Page Up] - View Previous button is used to view the previous Document in the Batch.

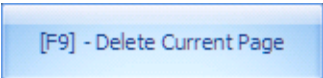
4 [Page Down] - View Next button



[Page Down] - View Next

The [Page Down] - View Next button is used to view the next Document in the Batch.


5 [F9] - Delete Current Page button



[F9] - Delete Current Page

To remove the current page click the [F9] - Delete Current Page button.

6 [F5] - Delete All Pages



[F5] - Delete All Pages

To start over click [F5] - Delete All Pages button. This button permanently removes the Batch from your computer. *Use with caution.*

7 Thumbnail Showing Document Type



BOL

Thumbnail Showing Document Type

8 Current Document Thumbnail



Thumbnail of current page.

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Previously Submitted Documents

Confirmation Email

Once Batches have been submitted, a confirmation email is sent to the email address you set up in the Registration process. The confirmation email contains a link to the **TRANSFLO EXPRESS® Confirmation Viewer**. By clicking on this link you may view some of the Batch details and the images in the Batch. (The text of the link is the *Confirmation Number* of the Batch.)

Previously Submitted Documents

Another way to view Batches that you have scanned is with the *Previously Submitted Documents* window. To open the *Previously Submitted Documents* window,

1. Navigate to the Initial window. This is the first window in the scanning process. If you are in the process of scanning and indexing a Batch, finish the scanning process and submit the Batch.
2. Open the *Previously Submitted Documents* window by clicking on the [F4] - Previously Submitted Documents button.

In the *Previously Submitted Documents* window the Batches that you have accepted are categorized by Broker. The information in this window includes,

1. The number of Batches that have been scanned in each Broker
2. The status of the Transmission
3. The number of pages in each Batch
4. The dates that the Batch was scanned and transmitted
5. For Batches that were transmitted successfully, the confirmation number is also available. (This is the same number that is in your confirmation email and is used to retrieve the Batch from the **TRANSFLO EXPRESS® Confirmation Viewer**.)

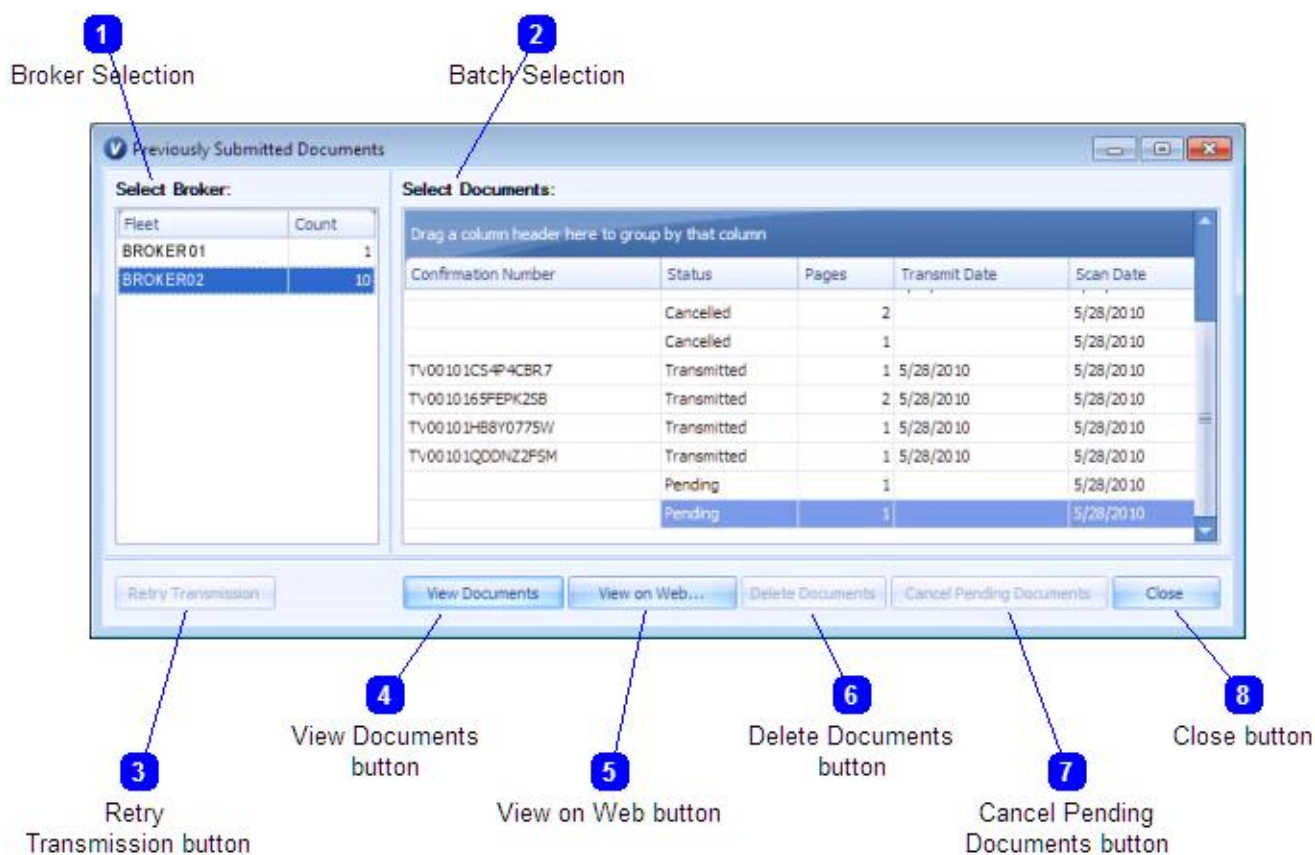
The structure of the Previously Submitted Documents

 [Previously Submitted Documents Window](#)

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Previously Submitted Documents Window



Batches that have been created can be viewed in the *Previously Submitted Documents* window shown here. The *Previously Submitted Documents* window is composed of two selection areas: the *Broker Selection* area and the *Batch Selection* area.

1 Broker Selection

Fleet	Count
BROKER01	1
BROKER02	10

The *Broker Selection* area shows all of the Brokers that are in your Broker list. It also contains the number of Batches that you have scanned for each Broker. To view the list of Batches that you have scanned for a specific Broker, click on the Broker in the *Broker Selection* area. The Batches for this Broker will be displayed in the *Select Documents* area.

2 Batch Selection

Select Documents:

Drag a column header here to group by that column

Confirmation Number	Status	Pages	Transmit Date	Scan Date
	Cancelled	2		5/28/2010
	Cancelled	1		5/28/2010
TV00101CS4P4CBR7	Transmitted	1	5/28/2010	5/28/2010
TV0010165FEPK2SB	Transmitted	2	5/28/2010	5/28/2010
TV00101HB8Y0775W	Transmitted	1	5/28/2010	5/28/2010
TV00101QDDNZ2FSM	Transmitted	1	5/28/2010	5/28/2010
	Pending	1		5/28/2010
	Pending	1		5/28/2010

The *Batch Selection* area contains details about the Batches that have been scanned. To view all of the columns, use the scroll bar at the bottom of the area to scroll to the right or left. The columns and their descriptions are shown below.

Confirmation Number. The Confirmation Number is the number that identifies the Batch in the **TRANSFLO EXPRESS®** system. This is only available for Batches that were successfully transmitted.

Status. The Status column provides the status of the Batch's transmission. If the Batch was transmitted successfully, the status is Transmitted. If the Batch is waiting for a connection for transmission, the status is **Pending**. If an error occurred during transmission, the status will be **Error**.

Pages. Contains the number of pages in each Batch.

Transmit Date. Contains the date and time the batch was transmitted to **TRANSFLO EXPRESS®** system.

Scan Date. The Scan Date column lists the dates and times that the Batches were created.

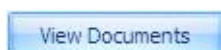
The remaining columns contain the Batch Level fields associated with the selected Broker and the data you entered in them.

3 Retry Transmission button



To retry sending **Pending** batches, click the Retry Transmission button.

4 View Documents button

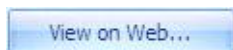


The View Documents button allows the user to view the Batch images and index data in the TRANSFLO \$Velocity(TM) Main Window. To view a Batch ,

1. Select a Broker by clicking on it in the *Broker Selection* area.
2. Select the Batch by clicking on it in the *Batch Selection* area.

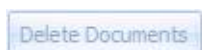
3. Click the View Documents button. (Double-clicking on the Batch row will also open the Batch.)
4. The *Previously Submitted Documents* window closes and the Batch opens in the *Main Window*.
5. If the Batch has not been transmitted, you may make changes to it. If it has been transmitted you may only view it.
6. When you have finished reviewing the Batch, the *Previously Submitted Documents* window opens again.

5 View on Web button



To view your Batch on the [TRANSFLO EXPRESS® Confirmation Viewer](#) website, select the Batch in the *Document Selection* list and click the View on Web button.

6 Delete Documents button



The Delete Documents button deletes all selected Batches that have a status of Transmitted and are older than 30 days from your computer.

To select multiple Batches,

1. Hold down the Ctrl key on your keyboard
2. Click on the Batch rows that you wish to select.

7 Cancel Pending Documents button



The Cancel Pending Documents button deletes all selected Batches that have a status of *Pending* from your computer. The next time you connect to the internet these Batches will not be transmitted.

To select multiple Batches,

1. Hold down the Ctrl key on your keyboard
2. Click on the Batch rows that you wish to select.

8 Close button



The Close button closes the *Batch History* window.