Chapter 6 – Setting Up Customers

Customers at Actonvale

Well, finally, we’re going to set up some customers (1). The ProTrak sample railroad has a number of predefined industries and we’ll need to adjust or delete some of these. Don’t worry too much, as we will delete some of them later. We just need to get a feel for how the customer maintenance works. Table 2 in Appendix B has a list of all the industries we’ll be changing. If you haven’t done so already, you might want to print off Table 2 in Appendix B.

1. Click on “Traffic” on the ProTrak toolbar then choose “Customers” from the dropdown list. You will then see the window shown in Figure 6-1.

2. Double-click on the third customer (2) – the “Team track”. The “Changing Customer: 3 of: 15” window shown in Figure 6-2 is used for entering or changing online customer data.

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1 Every location where a car could stand is treated as a ‘customer’ in ProTrak. Multiple sidings or spots at a single industry will each be a separate ‘customer’. This is one reason why ProTrak uses the term ‘customer’ rather than ‘industry’.

2 We’ll deal with customers 1 and 2 later as these are special situations which require some additional information.
3. Click on the “City, State/Prov” (tt) data field. From the list in the right-hand panel, double-click on “Actonvale”. You will notice that not only did the name in the “City, State/Prov” data field change, so did the “Siding SPOT” data field – it now reads “ACT 14” and the “appears as” data field shows “ACT-14”.

4. Click on the “Switching railroad” (tt) data field. The right-hand panel now lists all of the railroads that are in the ProTrak database plus our new railroad – “ProTrak Demonstrator”. Since that is the railroad that will be working this customer, double-click on “ProTrak Demonstrator” to update the “Switching Railroad” data field (3).

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3 While the right-hand column shows both the reporting marks and railroad name, only the reporting marks are transferred to the “Switching railroad” data field.
5. Click on the “Switching Train” (tt) data field. Again, the right-hand panel shows all of the available trains – the two staging yard trains and the train we defined in chapter 5, train “202” (4). Click on the drop-down arrow beside the “Switching Train” data field and double click on train “202” from the list to select it as the switching train for this customer.

6. The “Cars blocked at” data field is used to identify where cars are placed in the train (5). These numbers must be unique, but do not have to be consecutive. We’ll leave this data field unchanged.

7. Below the “Cars blocked at” data field, there are two radio buttons. These will indicate whether the industry is switched on the train’s outbound trip (Trailing point switch, or switched either direction) or on the return trip (Facing point switch, switched by turn on return trip). At present, the “Trailing point...” radio button is selected. We’ll leave this unchanged since, as you can see from looking at Figure Intro-1 in the introduction, SPOT ACT14 has a trailing point switch. For a description of facing point and trailing point switches, please refer to the definitions in Appendix A.

8. Leave all the remaining data fields blank or as they are. Figure 6-3 shows what the changed window should look like. Note that the values in the “Number of cars at this SPOT...” data fields (number of cars and length) may differ from what is shown here.

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4 If train202 does not appear, you need to update the line-up. Go back to chapter 5 where train 202 was created and review the instructions on updating the lineup.

5 While the numbers do not have to be consecutive, they must be in the order that you wish to switch the industries. Cars in switching block 7 will normally appear in the train closer to the locomotive than those in switching block 10. The exceptions to this rule are things like cars with hazardous goods, heavy cars and things of that nature which may require the car to be placed out of the normal blocking sequence.
9. Click on “OK” to finalize the changes and return to the “Customers and Loading Points” window. If you get the question “Correcting Siding SPOTs”, always click on “Yes”.

10. Look at the “Customers and Loading Points” window and check the data for customer 3. If the data reflects the changes you just made, you can continue on the step 12.

11. If the “Customers and Loading Points” window has not updated to reflect your changes, it is likely caused by a setting in the “ProTrak Program Options” window

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6 Clicking on “No” will cause you to have orphan waybills that no longer have a valid origin or a valid destination. This may be alright if you want to manually change the waybills. If a waybill is assigned to a car, it is updated regardless of whether you answered “Yes” or “No”.
a. On the ProTrak toolbar, click on “File” then select “ProTrak program Options, Housekeeping” from the dropdown list. A window like Figure 6-4 will appear.

*b.

You may see a check in the box following the statement “Long lists index to last opened list item” (left-hand panel of the window, “Options” section, top item). This causes windows such as the “Customers and Loading Points window to remain unchanged until such time as the window is closed and re-opened.

*c.

If the “Long lists...” box was checked, uncheck the box then click on “OK” (we’ll not worry about any of the other settings at this time). You should now be back at the “Customers and Loading Points” window.

d. To have changes to the “Long lists...” settings take effect, you must close the “Customers and Loading Points” window and re-open it.

For now we’ll not discuss the remaining items in “ProTrak Program Options” window.

12. Now that we’ve done customer 3, we need to make the same changes to customers 7 and 8.

- Change the “City, State/Prov” data field (step 3)
- Change the “Switching Railroad” data field (step 4)
- Change the “Switching Train” data field (step 5).
Figures 6-5 and 6-6 show what the before and after shots of customer 7 look like.

Before:
e. You may get the message shown in Figure 6-7.

![Figure 6-6]

![Correcting Siding SPOTS]

**Figure 6-6**

**Figure 6-7**
If you do, click on “Yes” and you will see a window which looks like the one shown in Figure 6-8.

![Figure 6-8](image)

As the program works through the waybills, it may find ones that need changing. If it does, a window similar to the one shown in Figure 6-9 will be displayed.

![Figure 6-9](image)

You will notice, near the bottom the words “Change this waybill?” followed by two radio buttons. Click on “Yes” to change the waybill. If there are
more waybills that need changing, they will be displayed one by one until all waybills for this customer have been changed. Note that the shipper and consignee data that you see may differ from what is in this screen shot.

Please be patient while this checking process happens. Initially, it will happen reasonably quickly, however as more data is added, the check will take longer to complete.

Finally, you will get the messages shown in Figures 6-10 and 6-11.

![Figure 6-10](image)

In both cases, click on “Yes” to keep your data in sync.

After making the changes to customers 3, 7 and 8, Figure 6-12 shows what the “Customers and Loading Points” window should look like.
Figure 6-12

If you remember back in step 7 we discussed “switching blocks”. Look at the last column (labeled “Blk#”). You will notice that most of the customers we changed have just a block number, but the two “Twin State Fruit” customer entries have the switching block number prefaced by “F-”. These customers have a facing point switch, so they will be switched on the return portion of the trip. Cars for switching blocks starting with “F-” are placed at the rear of the train.

Also note that customer “Twin State Fruit” has two customer entries. This has been done to accommodate placing cars at two separate locations for the customer. In this case the customer has two locations at the warehouse – a door spot and platform loading - and we need to place the cars at the correct location.

Another thing to notice is that several of the customers, Country Fuel for example, have a commodity entered in the “Siding name/commodity” data field. This was entered here simply to indicate what the siding will be used for; the data field could have been left blank. Two items to note about commodity entries.

- Even though a commodity has been entered in the “Siding name/commodity” data field, any car carrying any commodity can be spotted at this siding.

- If you enter the same siding name in two sidings for the same customer, ProTrak adds the lengths of the two sidings and treats them as if they were a single longer siding. ProTrak uses the siding

7 It is important to not use any of the ‘reserved’ commodity words/phrases that are shown when you click on the “Special” radio button.
number of the first listed siding, but cars can be spotted on either track. Here’s an example of where this feature may be useful. If you had a bulk propane loading facility with a track on either side of the loading platform, it doesn’t matter which track the cars are loaded at, so treating the two tracks as one works just fine.

**Minimum Data Items - Customers**

- Siding Number (Siding SPOT)
- Station (City, State/Prov)
- Service Train (Switching train)
- Switching Block (Cars blocked at)

(See Default and Minimum Data Items in Chapter 2 for an explanation)

**FAQs Customers**

Section C of Appendix L deals with customers.

As we noted, we skipped customers 1 and 2 and started with customer 3. This was done deliberately, as customers 1 and 2 are special situations. We’ll deal with them now.

**Weigh Scales**

1. Double-click on the second customer, the weigh scale. You’ll see the window shown in Figure 6-13.
The “Scales, Rip and Clean out tracks” edit window is used to setup and manage weigh scales, clean out and repair tracks. We’re going to manage our weigh scale.

2. Since we’re doing a weigh scale track and the “weigh scale” radio button beside the “Purpose of track is” label is already selected, we don’t need to do anything further with that item.

3. Click on the dropdown arrow to the right of the “Station name” data field, then select “ACT, Actonvale” from the list.

4. The “Track number” data field can be left at “08”. Note that the SPOT code is “z” (lower case) to indicate that this is a weigh scale (8).

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8 Select “Administration” from the ProTrak toolbar then select “Spot Format and special SPOTs” from the dropdown list for more information on “Special SPOTs”.
5. For now, leave the “Track length” data field set at 120 feet.

6. Again, for now leave the “Clearance Plate” data field set to “C: 15’-6”.

7. Click on the dropdown arrow beside the “Switching train” data field. Select “202” from the list.

8. As previously noted, the “switching block” controls where the cars are placed in the consist. We’ll leave the “Cars are placed in switching block” data field set to 22.

9. Click on “OK” to complete the edit.

10. You will now see the window shown in Figure 6-14.

![Figure 6-14]

If you have a “Grapevine Working Weigh Scale” installed, then you could click on “Yes”. Since for our purposes, we do not yet have that installed, we’ll click on “No”. The Grapevine signaling system is not part of the discussions and instructions in this manual. A separate manual on it is available from the ProTrak web site.

11. You will now be returned to the “Customers and Loading Points” window as shown in Figure 6-15.
Passenger Station

There is one final special situation to deal with – the passenger station.

1. In the "Customers and Loading Points" window double-click on the first customer – the “Passenger Station”. The window shown in Figure 6-16 will appear.
This window looks much like the window used to manage most normal customers, with a few differences.

2. Since we’re eventually going to run a passenger train from Actonvale to Castle Rock and return, the name “Passenger Station” isn’t very descriptive. Click on the “Industry name” (tt) data field and change it to read “Actonvale Station”.

3. Click on the “City, State/Prov” (tt) data field and from the center panel, double-click on “Actonvale”. You will note that the track number is “01” “Siding SPOT” changed to “ACT-01”. Passenger trains **always** work from "01" to "01" tracks at the various stations. It is important to note that a passenger station ‘track’ may be a single dedicated track, multiple tracks (such as would be in a station like Grand Central Station in New York) or
may simply be a designated spot on a track where passengers can be loaded and unloaded from a train.

4. For now we’ll leave the default values for the “Track length” (tt) and “Clearance Plate” (tt) data fields as they are for now.

5. Click on the “Siding radius” (tt) data field and change it to “22” so that we have a reasonable figure for the “Siding Radius and the “Max. car length... feet” data fields.

6. Again, change the “Switching Railroad” (tt) data field to “PRO, ProTrak Demonstrator” (9), just as we did with the other customers. Note that there is no “Switching Train” data field as, obviously, there can be many different passenger trains stopping at the passenger station.

7. Leave the “Railroad subdivision” data field blank for now.

8. The “Number of platform tracks” allows us to specify how many tracks are available for loading passengers. This option is primarily for those users who have large multi-track stations. For our purposes we’ll leave that set at “1, load passengers on main”.

9. Click on the dropdown arrow beside the “Population served” (10) (tt) data field and select “500 – 1000 people” from the list.

10. Click on the “Estimated ridership” (9) (tt) data field and change this to 5. At this point your window should look like the one in Figure 6-17.

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9 Remember when we changed customer 3 we noted that only the railroad initials are transferred to the Switching Railroad.” data field.

10 The “Population served” and “Estimated ridership” data fields were inserted at the insistence of one of the ProTrak users who worked for Amtrak. The “Estimated ridership” setting determines how many people get on and/or off the train at that station. This number appears on the passenger train “switchlist” and should affect the “dwell time” at the station.
11. Click on “OK” to complete the edit and return to the “Customers and Loading Points” window.

12. As with other customers, you may get one or more messages about updating SPOTs, etc. In every case, if you are offered a Yes/No option, click on “Yes” to keep your data in sync. As with other similar situations, please be patient while ProTrak completes these checks.

We’ve dealt with both a weigh scale and a passenger station in our ProTrak Demonstrator railroad. If your own railroad does not have a weigh scale, and/or a passenger station (or for that matter a team track), you may simply delete those customers.

Other Customers

We’ve dealt with the customers at “Actonvale” (for now, at least), but in order for train 202 to act in a reasonable fashion, we need to have one or more customers at “Berwick”, so let’s deal with them.
1. If the “Customers and Loading Points” window is not displayed, you need to click on “Traffic” on the ProTrak toolbar then select “Customers” from the dropdown list to bring it back up.

2. Double-click on entry 11 which currently shows as “Tennessee Pulp & Paper Co.”. We’re going to change this to one of our customers. Figure 6-18 shows what the window should look like before we start.

![Figure 6-18](image)

3. Click on the “Industry name” (tt) data field and replace “Tennessee Pulp and Paper Co” with “Wilson & Sons Scrap Metal”.

4. Click on the “City, State/Prov” (tt) data field. The window should now look like the one in Figure 6-19.
5. From the right-hand panel, double-click on “Berwick”. You will notice that, in addition to the “City, State/Prov” data field, the first part of the “Siding SPOT” and “appears as” data fields have also changed to read “BER”.

6. We need to change the siding number, which is the last part of the “Siding SPOT”. Refer back to the track plan schematic (Figure Intro-1 in the Introduction chapter). At Berwick there are two sidings – BER10 and BER11. We’ll put “Wilson & Sons Scrap Metals” on BER11. Click on the siding number portion of the “Siding SPOT” (tt) data field and change the existing “21a” to “11”.

7. We’ll leave the “Track length” (tt), “Clearance Plate” (tt) and “Siding radius” (tt) data fields as is for now.

8. Click on the “Siding name/commodity” data field. The commodity of “caustic soda” is probably not appropriate for a scrap metal dealer so we’ll
deal with that. While this could be blanked out, we'll indicate what commodity this siding will be used for, in this case "scrap iron".

9. In the right-hand panel, scroll down in the list to entry an entry where the "lading" field shows "scrap iron" (in my case it is entry # 1464). You will note that the entries in this list are currently displayed in alphabetical order. You could change this to display them in "STCC" order, however unless you currently work with the STCC codes, you may want to leave them in the order they currently show as. To change the "Siding name/commodity" data field, double-click in entry 1464 in the right-hand panel. You will notice that the "Siding name/commodity" data field now contains the selected information.

As you can see from the bottom of the right hand panel, you also have the option of entering something manually, if it is not in the list (John Allen's "Impossibilium Ore" for example). You will also note a radio button marked "Special". Try clicking on that button and you'll see what these are.

10. Click on the "Switching railroad" data field and double-click on "PRO, ProTrak Demonstrator" in the right-hand panel.

11. Click on the dropdown arrow beside the "Switching train" data field and select "202" from the list.

12. Click on the data field headed "Cars blocked at". The right-hand panel lists all customers now switched by this train, and the switching blocks that each customer is in. We'll put cars for Wilson & Sons switching block 29. Click on the arrow beside the "Cars blocked at" data field and scroll down until you come to the number 29. You will notice that as an aid to making sure you get things where they should be, all of the existing switching blocks are shown in the right hand panel.

13. Below the data field headed "Cars blocked at..." you will see two radio buttons. Again, refer to the track plan schematic. You will notice that, for a train going from Actonvale to Berwick, siding BER10 has a facing point switch, while siding BER11 has a trailing point switch. The radio

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12 This number may differ depending on what original version of ProTrak you have.
13 The terms "facing point" and "trailing point" refers to the way a switch is viewed by the crew in the locomotive. A facing point switch is one where the train arrives from the single track end of the switch whereas a trailing point switch is one where the train arrives from one of the two routes which merge at the switch. Looking at the drawing in figure Intro-1 in the Introduction section a
button “Trailing point switch, or switched either direction” should already be selected, if not, click on that radio button. This will mean that the customer at siding BER11 is switched before the train is ‘turned’ in preparation for its return trip. The customer at siding BER10, on the other hand, will be switched after the train is ‘turned’.

14. Figure 6-20 shows what the “Changing customer: 11 of: 15” window should look like at this point. (The data in the right-hand panel may differ).

![Figure 6-20]

15. The data fields “Other switching trains” (tt), “Number of cars at this SPOT” and “Currently loading/unloading in...” (tt) can be left alone. We only have one switching train at this point so the “Other switching trains”

train traveling from Actonvale to Berwick will see the switch at BER-10 as a facing point switch while the switch at BER-11 will be viewed as a trailing point switch.
data field is blank, and the other two data fields will be updated as cars are moved into and out of this SPOT.

16. Click on “OK” to complete the edits for this customer. Before the “Customers and Loading Points” window reappears, you may be asked about updating waybills and siding SPOTs. Always answer “Yes” if asked and remember to be patient.

17. Figure 6-21 shows what the “Customers and Loading Points” window should look like at this time.

14 For space reasons, Engineered Lumber has been abbreviated “Eng. Lmbr”. For those not familiar with the term, engineered lumber includes, among other things, those I-beam floor joists that you see made up of two 2x3’s or 2x4’s on edge with a piece of oriented strand board (OSB) between them. These are used in virtually all new homes constructed in the US and Canada today. For our purposes we’ll have North Star produce just the I-beam floor joists.
h. Leave the radio button which indicates the direction the switch faces set to “Trailing point switch...”. While this would seem to be incorrect according to the track plan schematic, in this case it is not. Since we will switch BER10 after the train has turned at BER02y, the switch will now be a trailing point switch.

Let’s take a moment to talk a bit more about trailing vs facing switches. The decision as to whether a switch is to be viewed as a trailing or facing switch is always dependent on the train that is servicing the customer at that switch. In the case of BER10, the customer is switched while the train is working at the turning point and thus is viewed as a trailing point switch. As Jim Moir has pointed out, at a service train’s turning point ‘trailing/facing’ has no meaning since at the turning point, the train is moving in both directions. In the case of Twin State Fruit, it is assumed that the switching would take place before train 202 left Act Yard thus the switches are viewed as facing point switches. Okay, let’s continue with the setup we’ve been doing.

At this point, your window should look like the one in Figure 6-22.
2. Click on “OK” to complete the edits and return to the “Customers and Loading Points” window. Again answer “Yes” if asked about updating waybills and/or SPOTs.

3. Figure 6-23 shows the “Customers and Loading Points” window now.
Ok, now we’ve got the customers at Actonvale and Berwick updated, but there are still a few customers shown that we don’t want, so we’ll delete them.

1. At the “Customers and Loading Points” window, click on entry 13 – “Tennessee Pulp & Paper”.

2. Click on “Edit” on the ProTrak toolbar. Select “Delete an online customer”. The window shown in Figure 6-24 will appear.

3. Click on “Yes” and the “Customers and Loading Points” window is now redisplayed, but without “Tennessee Pulp & Paper”. All of the customers following that entry have been moved up as it was deleted.

4. Repeat steps 1 through 3 with “Interchange” at “Second Station” – it will now be entry 13.

5. Repeat steps 1 through 3 with current customers 4 (Freighthouse), 5 (Country Fuels), 6 (Country Propane) and 9 (AgriFarm). Remember that as a customer is deleted, all those below it are moved up in the list so you must pay attention to the customer name to ensure you do not accidentally delete one of the customers we require.
6. Once all of the customers listed above have been deleted, the “Customers and Loading Points” window should look like the one in Figure 6-25.

![Figure 6-25](image)

7. If you see any customers other than the 9 listed in figure 6-25, delete them using the method we’ve previously used.

**IMPORTANT NOTE**: It is important that you **do not** delete the “reporting point” entry at Berwick (line 9 in Figure 6-25). This is the reporting location that is being used by train 202 to turn and return to Actonvale.

A word of warning. As a result of the changes we’ve made, if you shut down ProTrak at this point then restart, you may get the message shown in Figure 6-26.

![Figure 6-26](image)

If you get this message click on “Yes” to clean up your data.

8. Click on “Close” to close the “Customers and Loading Points” window.

For now, that’s all we’ll have to do with customers. We’ll do some additional work with these later, but let’s move on.
Summary

In Chapter 6 you have done the following:

- Used “Customer” menu to add additional customers to list:
  - Used “Siding name/commodity” panel;
  - Used trailing/facing point radio button.

You should also have done the following:

- Learned how to set program options;
- Learned how to define passenger train activity;
- Learned how to delete unwanted customers;
- Learned how to use “Customers” dropdown list under “Traffic” menu:
  - Made changes for customer types;
  - Defined facing or trailing point customers with radio button;
  - Learned how to change Siding SPOT.

We’ve now set up some of the customers for the new railroad and can move on to Chapter 7 where we’ll enter the data for the cars we need to service these customers.