

**Cross-Track 6**  
**Installation and Usage Guide**

**This document is a work in progress and will be progressively updated as new versions are released.**

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# Cross-Track 6 Installation

## ***System Requirements***

The minimum system requirements to run Cross-Track 6 are a PC with:

- Microsoft Windows Vista or later
- Microsoft Word 97 or later
- Sufficient RAM memory to run Windows comfortably
- At least 300 MB available storage on the hard drive

Microsoft Word is required to print the customizable version of the letters. You have an option, however, of using the non-customizable built-in letters that do not require Microsoft Word. See *System Options* under the Contents section entitled *Getting Started*.

## ***Installation Procedure***

To install Cross-Track 6, download the trail-version installation file from our website <http://bmi-backflow.com/cross-track.html> and run the file.

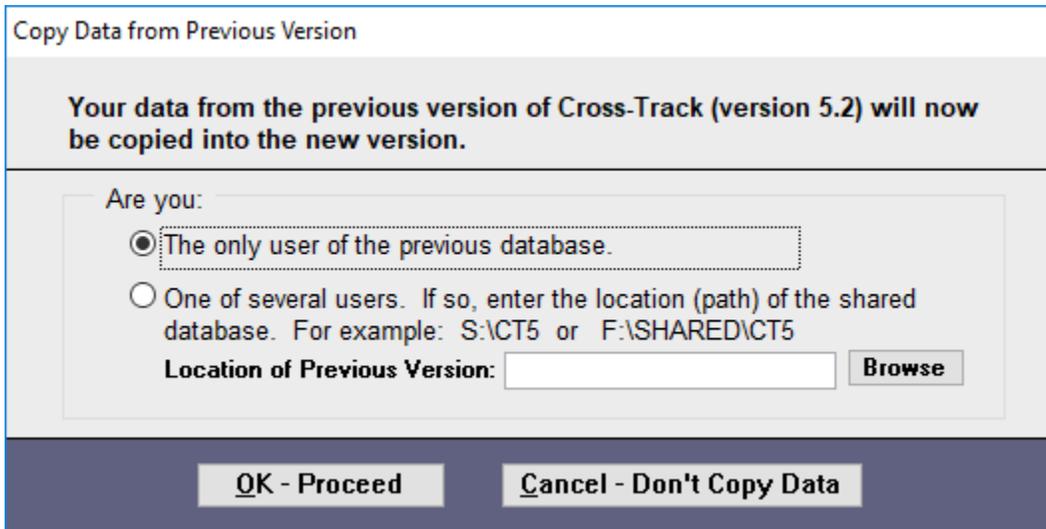
Follow the instructions displayed by the installation program. Cross-Track 6 will be installed on your C-drive in a folder named CT6, and a shortcut file (icon) will be placed on your desktop. The CT6 folder will include a subfolder named Letters, containing the customizable mail merge letters, and another subfolder named Photos, in which you may place photo images of assemblies.

## **Previous Cross-Track Users**

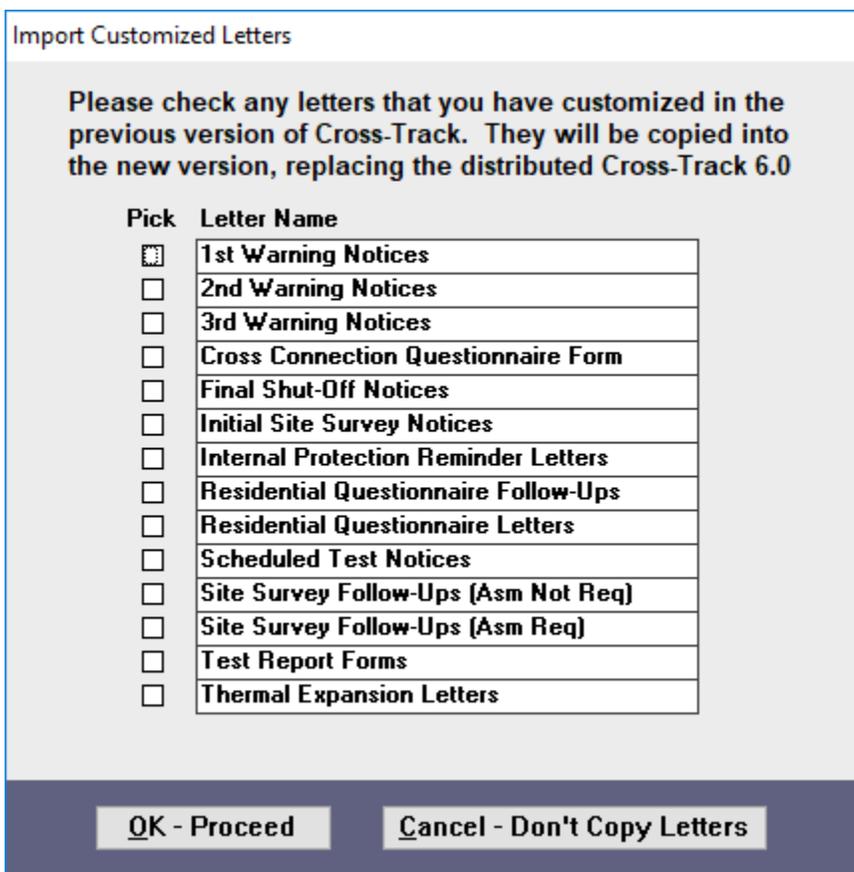
Installation of Cross-Track 6.0 does not uninstall the previous release. If you have been using the previous version of Cross-Track (version 5), your current data will be copied into the new version the first time you run it. A popup window will be displayed asking whether you were the only user or one of several users (Figure 1).

If you were the only user, it is assumed that your previous version is still located in a folder named CT5 on your C-drive, where it was initially installed. Otherwise, you will have to provide the current location (drive letter and folder) of the previous version.

After the data from Cross-Track 5 has been copied into Cross-Track 6.0, another popup window will be displayed asking if you have customized any of the letters in the previous version (Figure 2). If so, you will need to copy them into the new version so as not to lose your customization.



**Figure 1. Copy Data from Previous Version**



**Figure 2. Copy Customized Letters**

Once you have successfully installed Cross-Track 6 and copied in the data from the previous version, you should start using the new version and stop using the old. Do not continue to use the old version, as you will not be able to merge the data between the old and new. You should delete the old icon from your desktop and uninstall the previous version.

## Shared Usage

Cross-Track 6 may be installed on a local area network for shared usage by multiple PC's. It is important to follow the sequence in order:

1. Follow the normal installation procedure for the first PC and, if you were a previous Cross-Track user, copy in the data and, if you want, your customized letters from the previous version (see Figure 2).
2. Then move the entire CT6 folder, including its subfolders, from the C-drive to a drive or folder where it can be shared.
3. Change the shortcut file (icon) on the desktop to point to the new location. (Right-click the icon, select properties and, in the target field, change "C:\CT6" wherever you see it – it will appear twice in the target field -- to the shared drive and folder, e.g. where "S" is your shared drive, change the C-drive to "S:\CT6\System.mdw" "S:\CT6\Bmi6.accdb").
4. Run the file named "trusted.reg" that is included in the CT6 folder. This is an executable file; you can run it by double-clicking the file name. Its purpose is to allow the shared database to be opened without getting a security warning.
5. Repeat the installation of Cross-Track onto each PC that will access Cross-Track, but do not re-copy the old data or customized letters. After installing Cross-Track on these PCs, change each shortcut desktop icon to point to the shared location, as in step 3 above. Also run "trusted reg" on each PC, as in step 4 above.
6. If desired, you may delete the CT6 folder on the C-drive of each of the PCs.

**The only items necessary to access Cross-Track 6 on each PC are the desktop icon pointing to the shared location and Access Runtime which is automatically installed in the Program files folder on your C-Drive. When the first Cross-Track letter is generated from your computer, a new CT6 folder will automatically appear on your C-drive that will contain the 2 data source files (*see pages 22 – 23 for more detail on the data source files*).**

## Getting Started

### ***District Information and Setup***

→ The first time you use Cross-Track 6, you need to enter or verify the district information, scheduling, and system options.

Start Cross-Track by double clicking the shortcut (icon) on your desktop. The first screen you will see is the main menu (Figure 3). From the main menu click the Settings. This will display the main page of the District Information and Scheduling screen (Figure 4).

If you did not have a previous version of Cross-Track installed, all fields on the district information screen will be blank. Start by entering the district name at the top of the screen, then enter the remaining information. Make sure you enter the contact name, title, and contact phone, as this information will appear on the letters you send to your customers. Be sure the person is the appropriate contact for responding to customer questions.

Hint: You can import or copy and paste an actual contact person's signature or use a font that resembles a signature into your letters when customizing them.

Finally, this screen shows you the maximum number of customer accounts that you may enter. If you wish to upgrade your program license to handle more accounts, click the "Upgrade License" button, and follow the instructions. There are three sizes of CT; up to 100 accounts, up to 250 accounts up to 500 accounts, up to 3,000 accounts, and Unlimited customer accounts.



**Figure 3. Main Menu**

District Information and Scheduling

**BMI** District Name:

Main Page **Scheduling - Test Notices** Scheduling - Other Letters

**DISTRICT ADDRESS**

# 1:  Max # of Customer Accounts:

# 2:

City:

State/Province:   Zip:

Phone:  Contact:

Fax:  Title:

E-Mail:  Contact Phone:

**Figure 4. District Information – Main Page**

### Typing Hints

1. When you enter an address, always enter the state or province before the entering the zip. The zip will be checked for proper format for a US zip code if a US state was entered, or for a Canadian postal code if a Canadian province was entered. You may omit the hyphen in a 9-digit US zip code, or the space in the middle of a Canadian postal code. They will be inserted automatically.
2. You may enter a phone or fax number without any separation characters. If you enter *1234567890*, for example, it will be reformatted automatically to *(123) 456-7890*, whereas *1234567* will be reformatted to *123-4567*. If the number you enter does not have seven or ten digits, it will be left alone, exactly as you entered it, including any alphabetic or separation characters.

## Scheduling of Test Notices

Now click on the first Scheduling tab to display the next page of the district information screen (Figure 5). You should enter the cross-connection regulation, as this information appears in some of the letters. Hint: You could cite your own enforcement document or State regulation, e.g. Resolution 3, City of Main.

Most of the information on this screen controls the scheduling of test notices. Note that the numbers are all relative to the start of the test month. So, for example, if an assembly is due to be tested in April, the initial test notice will be scheduled for printing on March 21<sup>st</sup> (ten days before April 1<sup>st</sup>), the first warning notice will be scheduled for May 1<sup>st</sup> (30 days after April 1<sup>st</sup>), the second warning notice will be scheduled for May 16<sup>th</sup> (45 days after April 1<sup>st</sup>), etc.

The numbers shown in Figure 5 are the defaults, but you can change them. To omit the third warning notice, blank out the number shown. To omit both the second and third warning notices, blank out both numbers shown.

If you check the box to send test report forms with test notices, you will be able to print them from the Letters selection screen. You can also print individual test report forms from the customer information screen (see the section on *Assembly Information* in the Table of Contents).

District Information and Scheduling

**BMI** District Name:

**Main Page** **Scheduling - Test Notices** **Scheduling - Other Letters**

Regulation Governing Program

Send scheduled test notice:  days before start of test month

Send test report forms with scheduled test notices

Time to 1st warning notice:  days after start of test month

Time to 2nd warning notice:  days after start of test month

Time to 3rd warning notice:  days after start of test month

Time to final shut-off notice:  days after start of test month

Note: To omit the 2nd and/or 3rd warning notices, leave those fields blank.

Figure 5. District Information – Scheduling of Test Notice

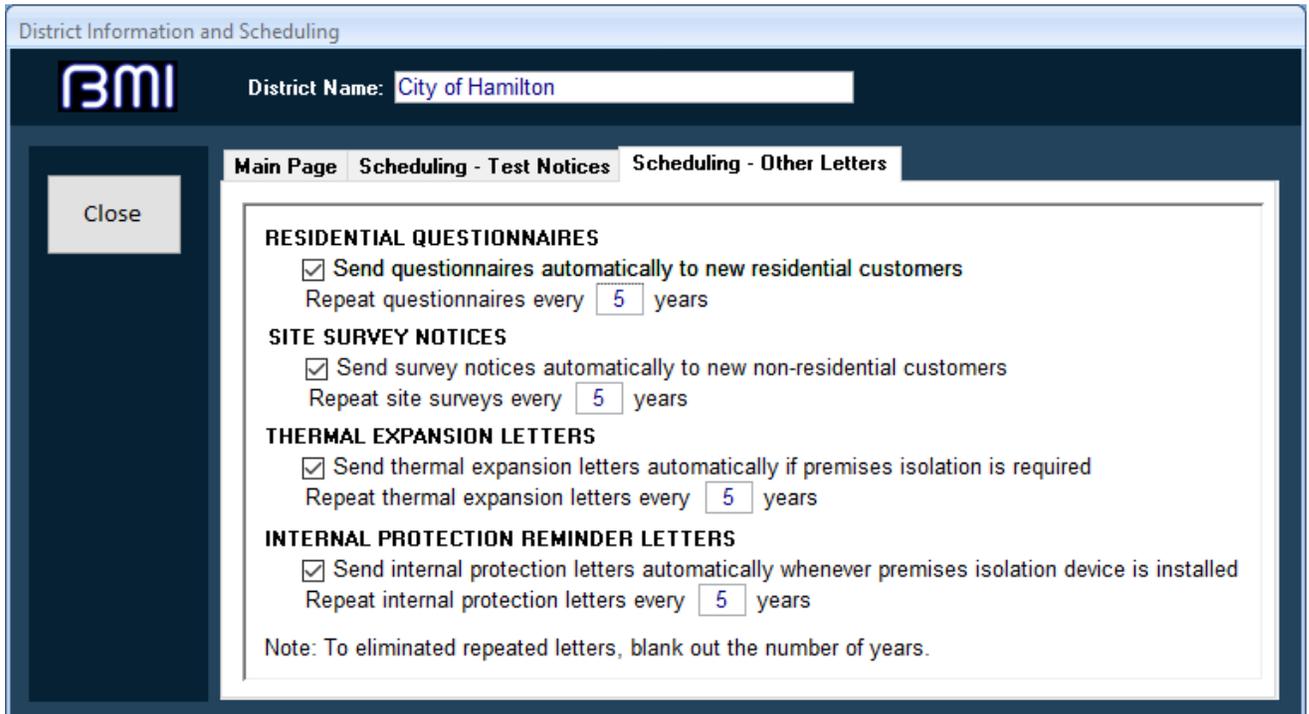
## Scheduling of Other Letters

Now click on the second Scheduling tab to display the next page of the district information screen (Figure 6). If you have checked the appropriate boxes, Cross-Track will automatically schedule:

- Residential questionnaires to be sent to new residential customers
- Site Survey notices to be sent to new non-residential customers
- Thermal expansion letters to be sent following a site survey if the survey results indicate that premises isolation is required
- Internal protection reminder letters to be sent following the installation of a premises isolation assembly

You may uncheck any or all of these boxes to eliminate the automated functions, and you may change the automated repetition cycle (number of years) for these letters or eliminate the repetition altogether. Remember these letters serve as important notifications and education to your customers, so carefully consider the benefits of sending and periodically resending them to assist with liability issues.

You may also control the scheduling of these letters individually on the customer information screen (see the section *Surveys and Questionnaires* in the Table of Contents).



District Information and Scheduling

**BMI** District Name:

**Main Page** **Scheduling - Test Notices** **Scheduling - Other Letters**

Close

**RESIDENTIAL QUESTIONNAIRES**  
 Send questionnaires automatically to new residential customers  
Repeat questionnaires every  years

**SITE SURVEY NOTICES**  
 Send survey notices automatically to new non-residential customers  
Repeat site surveys every  years

**THERMAL EXPANSION LETTERS**  
 Send thermal expansion letters automatically if premises isolation is required  
Repeat thermal expansion letters every  years

**INTERNAL PROTECTION REMINDER LETTERS**  
 Send internal protection letters automatically whenever premises isolation device is installed  
Repeat internal protection letters every  years

Note: To eliminated repeated letters, blank out the number of years.

**Figure 6. District Information – Scheduling of Other Letters**

# Regular Operation

## Customer Information

Click on the Customers button on the main menu to display the customer information screen (Figure 8). This section will always start on a new blank customer. The main page includes basic information about the customer. The customer name and account number appear at the top of the screen. They are both required fields. The account number, which must be unique, may be in any desired format, with or without alphabetic or separator characters.

Make sure you enter the mailing address if you plan to send letters. If you leave the site address blank, it will be assumed to be the same as the mailing address. If you have customers with multiple sites, you can create multiple account records for them. Each record must have a unique account number, but the customer name and mailing address may be the same.

Note: If you enter a “Main Contact” name, that name will appear as an “Attn” line on mailing labels and letters.

The Notes section is for your own comments/notes and will not appear in any letters.

Customer Site Information

**BMI** Customer:  Account #:

Main Page | Surveys | List of Assemblies | Assembly Details | Test Schedules/Results | Photos

**MAILING ADDRESS**

# 1:   
# 2:   
City:    
State/Province:   Zip:

**SITE ADDRESS (if different from mail address)**

# 1:   
# 2:   
City:    
State/Province:   Zip:

**CUSTOMER INFORMATION**

Acct Type:    
Main Contact:   
Main Phone:   
Cell Phone:   
Fax:   
E-Mail:   
Notes:

**SITE INFORMATION**

Block ID:     
Site Contact:   
Site Phone:   
Cell Phone:   
Fax:   
E-Mail:

Record:   1 of 1   No Filter Search

Figure 8. Customer Information – Main Page

To search for a particular customer account record, click the “Find Customer” button at the bottom of the page. This will display a pop-up window prompting you to do a search by customer name, account number, mailing address, site address, or assembly serial number. The drop down menus at the end of each line also allow you to look at all the choices in each category.

On the customer information screen, you may also move from one record to another by using the arrow keys at the bottom of the screen.

To enter a new customer account record, click the “New Customer” button. This will clear the fields so that you can enter the new information. To delete a record, first display the record you want to delete, then click the “Delete Customer” button.

## Surveys and Questionnaires

The next tab on the customer information screen displays the surveys page (Figure 9).

Customer Site Information

**BMI** Customer:  Account #:

Main Page **Surveys** List of Assemblies Assembly Details Test Schedules/Results Photos

Find Customer  
New Customer  
Delete Customer  
Close

**SITE SURVEY**

Survey Required  
Survey Notification Sent:   
Survey Completed On:

**SURVEY RESULTS**

Assemblies Required  
Type of Protection:    
Survey Follow-up Sent:   
2nd Survey Follow-up Sent:   
Follow-up Inspection By:

Survey Results for Follow-up Letter

**RESIDENTIAL QUESTIONNAIRE**

Questionnaire Required  
Initial Letter Sent:   
30-Day Follow-up Sent:   
 Response Received

Send Thermal Expansion Letter  
Thermal Letter Sent:   
 Send Internal Protection Reminder  
Reminder Letter Sent:

General Comments

Record:   Search

**Figure 9. Customer Information – Surveys**

To initiate a residential questionnaire, check the “Questionnaire Required” box. This will schedule the printing of a residential questionnaire letter. (This box may also be checked automatically for all new residential customers – see *Scheduling of Other Information* under the section entitled *District Information and Setup*).

When you receive the questionnaire response from the customer, check the “Response Received” box. A residential questionnaire follow-up letter will be scheduled for printing if a response has not been received within 30 days of the original letter.

To initiate a site survey, check the “Survey Required” box. This will schedule the printing of an initial site survey notice. Once the survey has been completed and the results obtained, enter the survey completion date in the space provided. Entering the date will cause a site survey follow-up letter to be scheduled for printing, depending on the results.

- If the survey results indicate that assemblies are not required at this time, there is nothing more to enter in this section. The “assemblies not required” version of the site survey follow-up letter will be scheduled for printing.
- If assemblies *are* required you must check the Assemblies Required box and fill in the remaining information – the type of protection required (if known), the date for a follow-up survey, and a paragraph summarizing the survey results. The latter is especially important, because whatever text you enter will be included in the “assemblies required” version of the survey follow-up letter. The “General Comments” area is for your private use and will not be included in any letters.

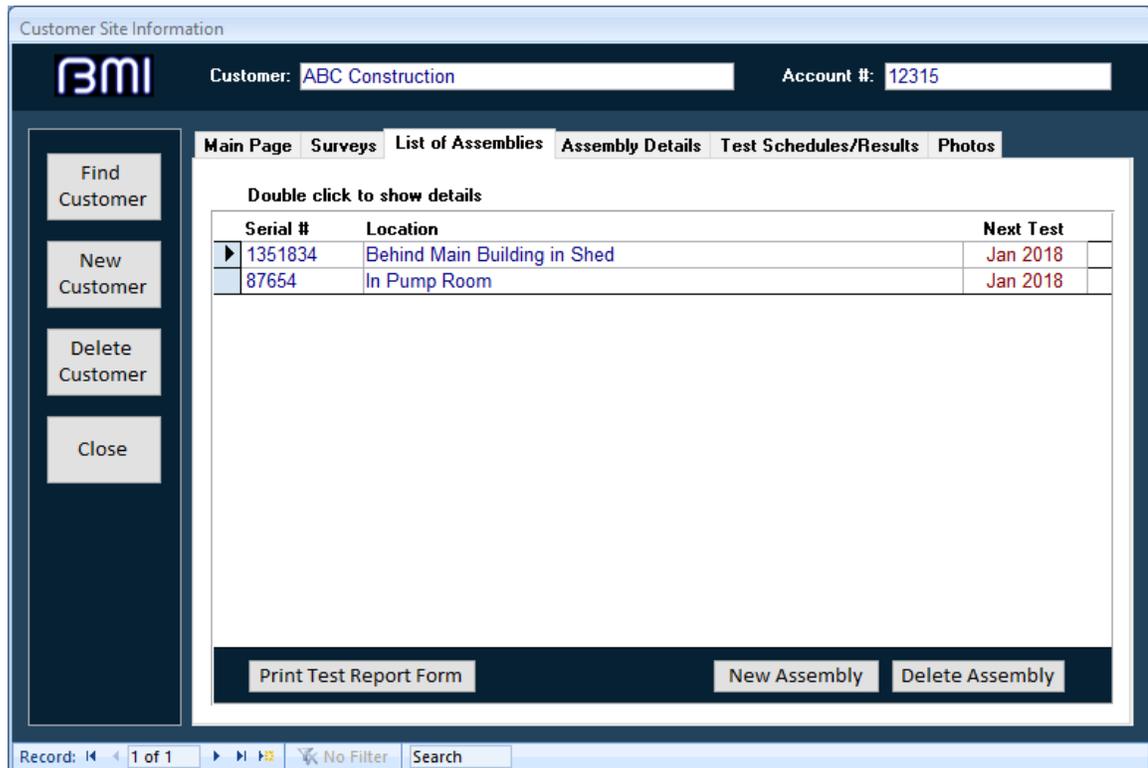
The remaining two check boxes on the survey page will schedule the printing of a thermal expansion letter and/or an internal protection reminder letter. The first of these letters explains the problems associated with thermal expansion, and the second is a reminder that premises isolation assemblies do not provide internal protection within the site.

If the corresponding automated functions are enabled, a thermal expansion letter will be scheduled automatically whenever the survey results are entered and the type of protection is set to “premises isolation”, and an internal protection reminder letter will be scheduled automatically whenever a new premises isolation assembly is installed. See *Scheduling of Other Information* under the section entitled *District Information and Setup*.

## Assembly Information

The “List of Assemblies” tab on the customer information screen displays a summary list of assemblies for this account (Figure 10). To enter a new assembly for this account, click the “New Assembly” button. The assembly details page will then be displayed with all the fields cleared to allow you to enter the new information. To delete an assembly, first put the cursor on the line you want to delete, then click the “Delete Assembly” button.

A test report form may also be printed from this page. To do so, put the cursor on the desired line and then click the Print Test Report Form button.



Customer Site Information

**BMI** Customer:  Account #:

Main Page Surveys **List of Assemblies** Assembly Details Test Schedules/Results Photos

Double click to show details

Serial #	Location	Next Test
▶ 1351834	Behind Main Building in Shed	Jan 2018
87654	In Pump Room	Jan 2018

Print Test Report Form New Assembly Delete Assembly

Record: 1 of 1 No Filter Search

**Figure 10. Customer Information – List of Assemblies**

To display additional information about an assembly, either double click a line in the summary list, or click the “Assembly Details” tab. Either way, the assembly details page will be displayed (Figure 11).

You may use the right and left arrow buttons on the details screen to display the various assemblies for this customer account. You may also add or delete assemblies from this screen (and any of the other assembly screens).

For assemblies, the serial number and test interval are both required fields. The serial number must be unique for each customer account (different accounts can have the same assembly serial numbers). Note that the assembly location that you enter on this screen is included in test notices sent to customers, along with the assembly serial number. Make

sure you enter enough information in the location field to easily identify the particular assembly. The “Comments” area is private and will not be included in any letters.

The screenshot displays the BMI Customer Site Information web application. At the top, the BMI logo is on the left, and the Customer: ABC Construction and Account #: 12315 are on the right. Below this is a navigation menu with tabs: Main Page, Surveys, List of Assemblies, Assembly Details (selected), Test Schedules/Results, and Photos. On the left side, there is a vertical sidebar with buttons: Find Customer, New Customer, Delete Customer, and Close. The main content area shows the Assembly Details for a specific assembly. The fields are as follows:

Serial #:	1351834	Date Installed:	8/1/2011
Make:	WATTS	Purpose:	Fire System
Model:	009	Isolation:	Premises Isolation (Containment)
Size:	.50	Hazard Level:	High Health Hazard
Type:	RPBA	Test Interval:	12 Months
Location:	Behind Main Building in Shed	Map ID:	
Comments:			

At the bottom of the main content area, there is a navigation bar with left and right arrow buttons, the text "Record 1 of 2", and buttons for "New Assembly" and "Delete Assembly". At the very bottom of the application window, there is a status bar with "Record: 1 of 1", "No Filter", and a "Search" input field.

Figure 11. Customer Information – Assembly Details

The “Test Schedules/Results” tab on the customer information screen allows you to enter the results of an assembly test, and also displays information about the scheduling of test notices and past test history (Figure 10). Whenever a test has been completed, you enter the test date, results, and the tester’s name in the first three fields of this screen, then hit the Submit button. The next test will then be scheduled and shown in the “Next Test” field automatically.

If you need to change the test history, you will first have to click on the “Edit History Button” and then make your changes.

Customer Site Information

**BMI** Customer:  Account #:

Main Page Surveys List of Assemblies Assembly Details **Test Schedules/Results** Photos

Find Customer  
New Customer  
Delete Customer  
Close

**Enter Test Results**

Test Date:

Result:

Tester:

Serial #:   
Next Test:

Test Notes

**Scheduled Letters**  Stop Warning Letters

Test Required Letter: 12/22/2018  Sent?

1st Warning Notice: 1/31/2019  Sent?

2nd Warning Notice: 2/15/2019  Sent?

3rd Warning Notice: 3/2/2019  Sent?

Final Warning Notice: 3/17/2019  Sent?

**Test History**

Test Date	Result	Tester
1/3/2018	Passed	Stan Shirpike
1/1/2011	Passed	Chris Kripke

Record 1 of 2

Record:   1 of 1   No Filter

**Figure 12. Customer Information – Test Schedules/Results**

Tests are normally scheduled to occur once each 12 months on the anniversary month of the installation, even if the test is conducted late. If a test is conducted early, however, the schedule for subsequent tests will be pushed up. For example, suppose a test is scheduled for August 2008. If the test is not conducted until September 2008, the following test will still be scheduled for August 2009. If the test is conducted early, say in June 2008, then the next test will be scheduled for June 2009.

**Note:** If the next test date is wrong, you can change it on this screen. You should seldom if ever have to do this, however. Normally, you should allow the system to compute the next test date, which it will do automatically after you enter test results. A test interval other than 12 months can be set from the “Customer Information” section on the “Assembly Details” tab. Make sure you know what the local requirements are before you change this interval.

The schedule for the test and warning letters, shown on this screen, is set automatically based on the next test month and the letter intervals set in the district information screen. Whenever a letter is printed, the *Sent?* box is checked automatically. If a letter is printed late, the subsequent letters are rescheduled to preserve the appropriate intervals between them. If you click the “Stop Warning Letters” box, no further warning letters will be sent *for this assembly*. Once a successful test is conducted, the box is automatically unchecked and the next test is scheduled.

### **Entering Dates**

Dates are entered using the format month/day/year, with either a 2- or 4-digit year. You must enter either a slash or hyphen as a separator character.

Examples:

4/1/08

4-1-2008

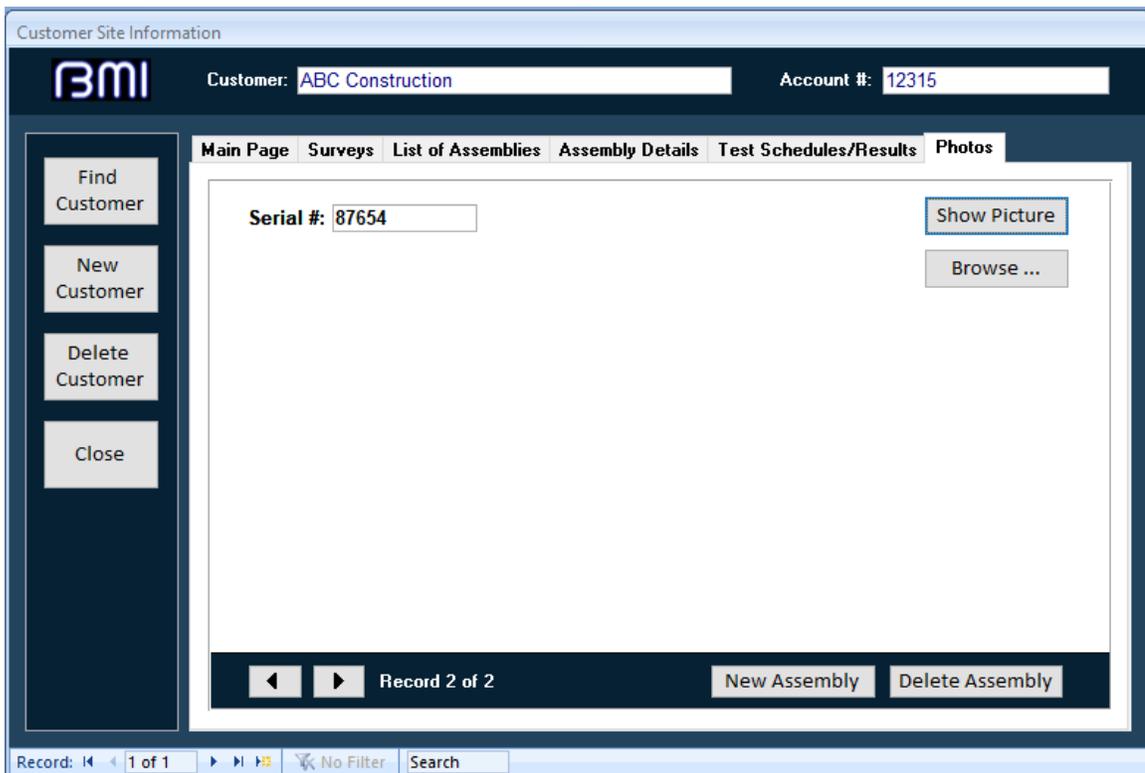
If you enter a 2-digit year, the date will be reformatted automatically to show a 4-digit year. If you may omit the year altogether, the current year is assumed.

Example:

4/1 is assumed to be 4/1/2008 if this is year 2008

The “Photos” page of the customer information screen is shown in Figure 13. If you want to display a photo of an assembly, you must first put (save) the image file (of type *bmp*, *jpg*, *gif*, *tif*, or *pcx*) into the Photos subfolder within the folder CT6 (on your C-drive unless you have a shared user installation -- see the section entitled *Installation Procedure*). Then you enter the name of the image file in this screen. You may click the Browse button to find the file name.

Once you have entered the file name for the photo, you may click the “Show Picture” button to display it. Photos are not displayed automatically so as not to slow the performance of your pc. There is one sample photo included in this folder.



**Figure 13. Customer Information – Photos**

## Letters

Click the “Letters” button on the main opening page menu to display the letter selection screen (Figure 14). This screen shows the number of letters that are currently scheduled to be printed. It also gives you an option of printing letters only, mailing labels only, or both. Additionally it also displays the number of Delinquent Tests After Final Warning, ie the number of customers who have been sent a final warning notice but have not had passing tests entered for all assemblies. This Delinquent Tests... option is in fact a report, but having that information in this location brings it more to your attention.

The “due” column on this screen shows the number of *customers* who are due to receive letters. There is one exception: The number for test report forms shows the number of *assemblies* that are currently due to be tested. (This number will be zero if you have disabled the sending of test report forms with test notices – see *Scheduling of Test Notices*, Figure 5).

Due	Letter
0	Residential Questionnaire Letters
0	Residential Questionnaire Follow-Ups
1	Initial Site Survey Notices
0	Site Survey Follow-Ups (Asm Req)
0	Site Survey Follow-Ups (Asm Not Req)
0	2nd Site Survey Follow-Ups (Overdue)
0	Thermal Expansion Letters
1	Internal Protection Reminder Letters
-----	
1	Scheduled Test Notices
0	1st Warning Notices
0	2nd Warning Notices
0	3rd Warning Notices
0	Final Shut-Off Notices
1	Test Report Forms - Due for Testing Now
0	Delinquent Tests After Final Warning
-----	
	Test Report Forms - Any or All Customers
	CC Questionnaire - Any or All Customers

**Print Options**

Print Letters and Labels

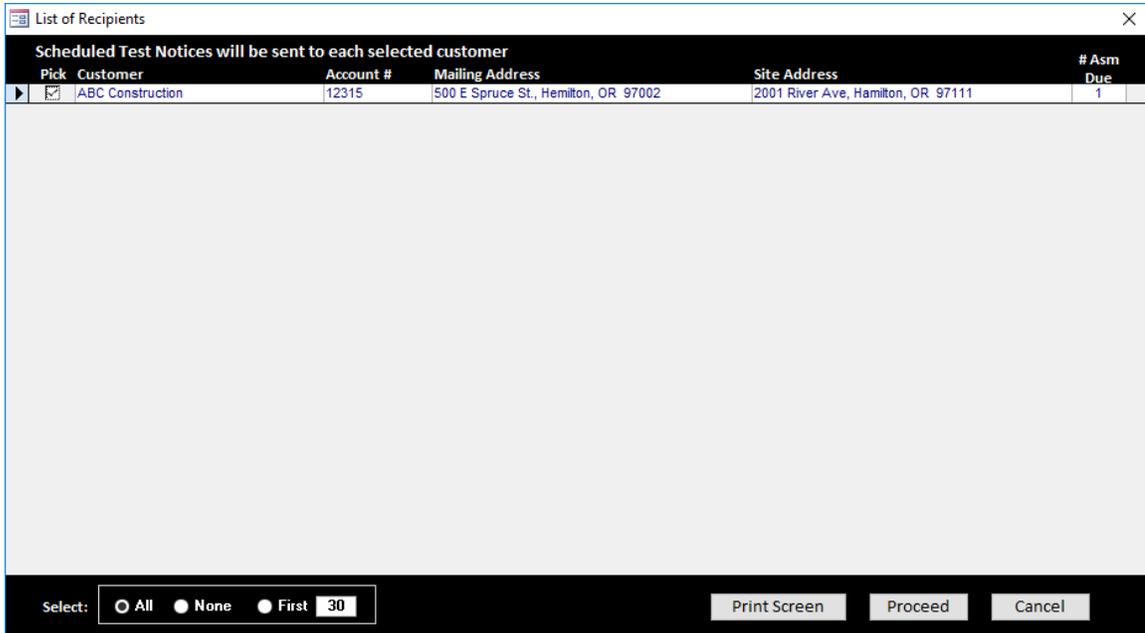
Print Letters Only

Print Labels Only

**Figure 14. Letter Selection**

To print a letter, first select which of the three print options you want, then select the letter by clicking/highlighting it in the list, then click the “Print” button. A screen will be displayed listing the customers who will receive the letters (Figure 15). The check boxes down the left-hand side allow you to control which letters are to be printed at this time. Buttons at the lower left of the screen will check or uncheck all of them, or check a batch (you can change the default number “30” to any number you want).

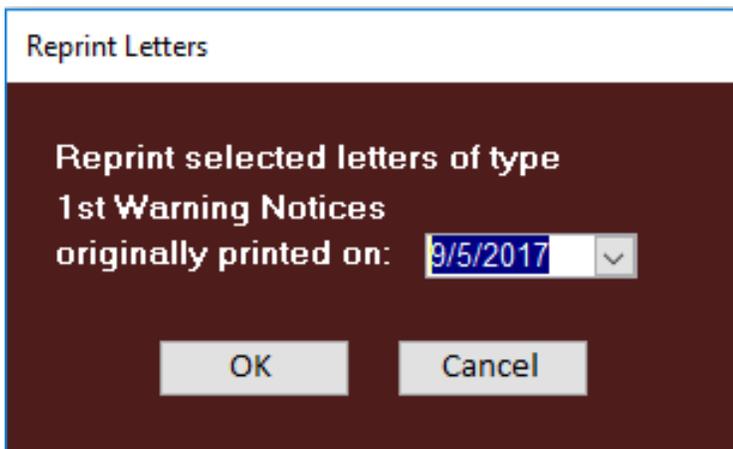
When you click the “Proceed” button on that screen, the checked letters will be printed and the current date will be recorded as the date sent.



**Figure 15. List of Recipients**

Occasionally you may need to reprint letters or mailing labels. To do this, first select the type of letter on the letter selection screen and then click the “Reprint” button. A pop-up window will be displayed (Figure 16) showing you the last date letters of this type were printed.

The list of recipients (Figure 15) will then be displayed for the original batch of letters, and you can check the ones you want to reprint.



**Figure 16. Reprint/Reset Letters Popup Window**

## Reports

Click the “Reports” button on the main opening page menu to display the report selection screen (Figure 17). To select a report, click it in the list, then click either the “Preview” or “Print” button. The Preview button will display the report in printer format, with an option to print it or email it, whereas the Print button will print it directly.

Some of the reports will require a range of desired dates to be entered to generate a report, for example the Assembly Test Summary, Status, Tests by Make reports. A pop-up box will appear as a prompt to enter the starting and ending dates.

The Export Customer and Assembly Information is an option to export the following fields into a Microsoft Excel file for all selected customers: Customer Name, Account ID, Mailing Address, Site Address, Assembly Type, Make, Model, Size, Purpose, Location, and Next Test date.

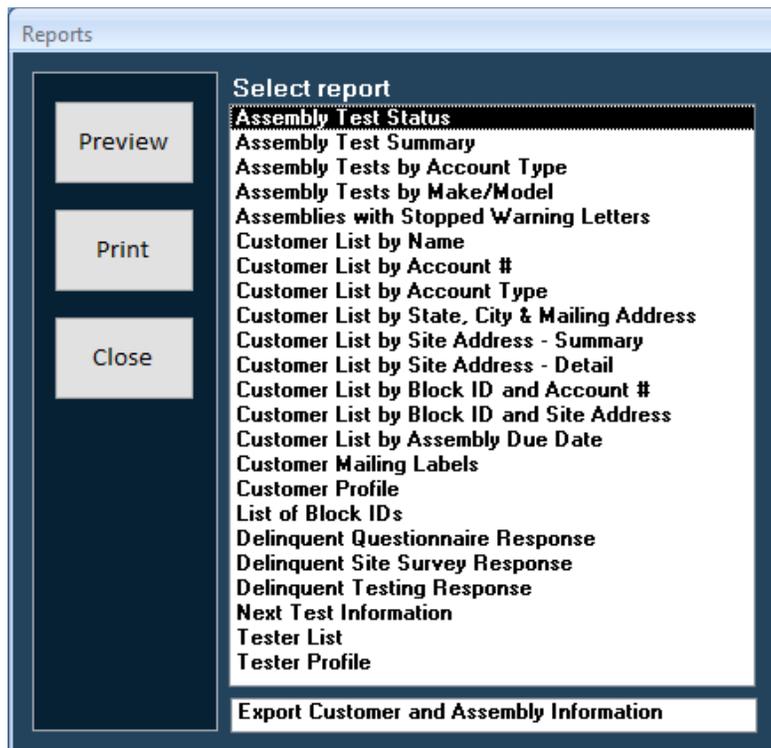


Figure 17. Report Selection

## Testers

Click the “Testers” button on the main opening page menu to display the tester information screen (Figure 18). The main Tester page includes basic information about the tester. The tester ID, which is required, must be unique. This ID should be their Tester certification number that they received from their certification agency, for example “B1234”.

To search for a particular tester, click the “Find” button at the bottom of the page. This will display a pop-up window prompting you to enter a tester name. On the tester information screen, you may also move from one record to another by using the arrow keys at the bottom of the screen.

During certification renewal periods, you may need to temporarily deactivate a tester by changing the “Active” drop down field to “No”. This will retain all the tester’s information but will not include this tester on the Tester Report letter that is provided to the customer with their test due notices.

To enter a new tester record, click the “New Tester” button. This will clear the fields so that you can enter the new information. To delete a record, first display the record you want to delete, then click the “Delete Tester” button.

The remaining tabs on the tester information screen allow you to enter additional information about the tester, including certification, insurance, and gauge calibration.

Tester Information

**BMI** Tester Name:  Certification #:

**Main Page** Certification Insurance Gauge Calibration

Company:   Tester  Contractor

Address:  Active:

City:  Comments:

State/Province:  Zip:

Phone:  Contact:

Fax:  Contact Phone:

E-Mail:  Cell/Pager:

Record: 1 of 1 No Filter Search

Figure 18. Tester Information – Main Page

## Customizing the Letters

The customizable letters are stored as mail merge document templates (.dot) files in the CT6 folder on your C-drive (or on a shared drive if you have a shared usage installation) in the Letters sub-folder. You may modify them using Microsoft Word, version 97 or later.

It is strongly recommended that you first make a backup copy of the template files before you modify them, since there is no automated procedure to restore an original template.

To edit a template, navigate to the Letters folder within the CT6 folder, **Right-Click then select Open** on the letter you wish to edit. Notice that the letter opens with a “.dot” extension instead of the normal “.doc”. You can import your letterhead, change the wording and add or delete mail merge fields. After completing your changes, just “save” the template (it should retain the extension “.dot” and be saved back into the Letters folder).

Two files are used as the data source for the mail merge. Their file names are:

Data Source1.txt – for scheduled test letters and warnings, and test report forms  
Data Source2.txt – for all other letters

These two files will be found in the CT6 folder on your C-drive once you have generated some letters (even if you have a shared usage installation, the data source files for mail merge will be generated on *your* C-drive once you print any letter.)

Both data source files include some data merge fields that are not currently used in the document templates. You may include any of the available fields when customizing the documents.

Data Source1, used for scheduled test letters and warning notices, includes 10 groups of fields for assembly information. This allows up to 10 assemblies to be listed in a letter. If a customer account has more than 10 assemblies due for testing in the same month, multiple letters will be printed for that account. Example: If twenty-three assemblies are due for testing, three letters will be printed, listing the first 10 assemblies, the second 10, and the last three.

The merge fields included in Data Source1 are shown in Table 1. Data Source2 has the same fields as Data Source1, except that there is no assembly information, as noted.

<i>Category</i>	<i>Merge Field Name</i>	<i>Comments</i>
District Information	ServiceDistrict	District Name
	DistrictContact	
	ContactTitle	
	ContactPhone	
	Regulation	
Customer Information	CustomerName	
	AccountID	Account Number
	MAddress1	Mailing Address
	MAddress2	
	MCity	
	MState	
	MZip	
	SAddress1	Site Address
	SAddress2	
	SCity	
	SState	
	SZip	
	AcctType	Account Type
	Contact	Account Contact Name
	AttnLine	“ATTN: ” plus Account Contact Name
	Phone	Account Phone
	CellPhone	Account Cell Phone
Fax	Account Fax	
EMail	Account Email	
BlockID		
	SiteContact	Site Contact Name
Residential Questionnaires	ResQLetterSent	Date Letter Printed
	ResQFollowUpSent	Date Letter Printed
	ResQReceived	Yes/No
Site Surveys	SurveyRequired	Yes/No
	SurveyLetterSent	Date Letter Printed
	SurveyComplete	Date Survey Completed
	AssemRqd	Assemblies Required (Yes/No)
	SurveyFollowUpSent	Date Letter Printed
	FollowUpDate	Date for Follow Up Inspection
	ReportNotes	For Follow Up Letter if Assem Req
	SendExpandLetter	Thermal Exp Letter (Yes/No)
	ExpandLetterSent	Date Letter Printed
Assembly Information (Data Source 1 only)	TestDue	Next Test Date (Month and Year)
	SerialNumber (x10)	There are 10 of each of these fields, named SerialNumber, SerialNumber2, ..., SerialNumber10 Location, Location2, ..., Location10 Etc.
	Location (x10)	
	AsmMake (x10)	
	AsmModel (x10)	
	AsmSize (x10)	
	AsmType (x10)	
	LastTestDate (x10)	
	TesterName (x10)	

**Table 1. Merge Fields in Data Source1**

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