

Cross-Track for Testers

Installation and Users Guide

Created by: Backflow Management Inc.
17752 NE San Rafael Street
Portland, OR 97230

Technical Support: 800-841-7689
or questions

Email: bmi@bmibackflow.com

Web site: www.bmi-backflow.com

Copyright © 2012, 2013 Backflow Management Inc.

Contents

Installation	1
System Requirements	1
Installation Procedure	1
<i>Figure 1. Copy Data from Cross-Track 5.x</i>	2
Getting Started	4
Company and Setup Information	4
<i>Figure 2. Main Menu</i>	5
<i>Figure 3. Company Information – Main Page</i>	5
Company Gauges	6
<i>Figure 4. Company Gauges</i>	6
Test Notices, Invoices, Letters	7
<i>Figure 5. Test Notices, Invoices, Letters</i>	7
Price List for Testing	8
<i>Figure 6. Price List for Testing</i>	8
Water Systems	9
<i>Figure 7. Public Water Systems</i>	9
Customer Information	10
<i>Figure 8. Customer Screen – Main Page</i>	10
<i>Figure 9. Find Customer Pop-Up Window</i>	11
Notes	13
<i>Figure 10. Customer Screen - Notes</i>	13
List of Assemblies	14
<i>Figure 11. Customer Screen – List of Assemblies</i>	14
Assembly Details	15
<i>Figure 12. Customer Screen – Assembly Details</i>	15
Test Results/History	17
<i>Figure 13. Customer Screen – Test Results/History</i>	18
Billing/Payments	19
<i>Figure 14. Customer Screen – Billing/Payments</i>	20
Photos	21
<i>Figure 15. Customer Screen – Photos</i>	21

Contents (Continued)

Testers	21
<i>Figure 16.</i> Tester Information – Employees	22
<i>Figure 17.</i> Tester Information – Contractors	23
Letters/Notices	24
<i>Figure 18.</i> Letters/Notices Selection	24
<i>Figure 19.</i> List of Recipients	26
<i>Figure 20.</i> Select Email Recipients	26
<i>Figure 21.</i> Reprint/Reset Letters Pop-up Window	27
Reports	28
<i>Figure 22.</i> Report Selection	28
Customizing the Documents	29
<i>Table 1.</i> Merge Fields in Data Source1	31
<i>Table 2.</i> Merge Fields in Data Source2	33
<i>Table 3.</i> Merge Fields in Data Source3	34
<i>Table 4.</i> Merge Fields in Data Source4	37
<i>Table 5.</i> Merge Fields in Data Source5	38
Back -up Your Data	39
Software License Agreement	41

Installation

System Requirements

The minimum system requirements to run Cross-Track for Testers (CT/Testers) are a PC with:

- Microsoft Windows XP or later
- Microsoft Word 2000 or later
- CD-ROM or DVD drive and the ability to download the program from our web site
- Sufficient RAM memory to run Windows comfortably
- 300 MB available storage on the hard drive

Microsoft Word is required to print and email the customizable letters and notices.

Installation Procedure

To install CT/Testers, insert the CD into the CD-ROM drive. The installation procedure should start automatically.

Follow the instructions displayed by the installation program. CT/Testers will be installed on your C-drive in a folder named “CTT” and a shortcut file (icon) will be placed on your desktop. The folder CTT will include a subfolder named Letters, containing the customizable mail merge documents.

Cross-Track 5 Users

If you have been using the current version of Cross-Track (version 5.x), your current customer data can be copied into CT/Testers the first time you run it. A pop-up 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 Cross-Track 5.x 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.

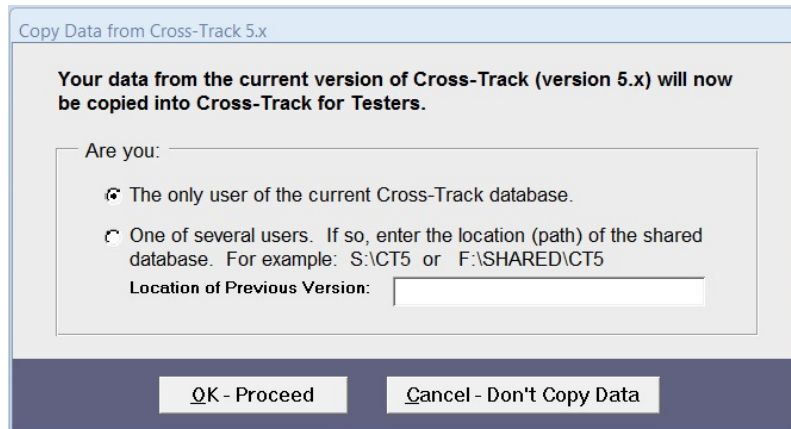


Figure 1. Copy Data from Cross-Track 5.x

Shared Usage

CT/Testers may be installed on a local area network for shared usage by multiple personal computers (PCs). It is important to follow the sequence in order:

1. Follow the normal installation procedure for the first PC and, if you are a Cross-Track 5.x user, copy in the data (see Figure 1).
2. Then move the entire CTT 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:\CTT” wherever you see it – it will appear twice in the target field – to the shared drive and folder location, e.g. if “S” is your shared drive, change the C-drive to /wrkgrp "S:\CTT\System.mdw"
"S:\CTT\CT_Tester.mdb"
4. Run the file named *trusted.reg* that is included in the CTT 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 Microsoft security warning.
5. Repeat the installation of the CT/Testers CD onto each PC that will access CT/Testers, but do not copy the Cross-Track 5.x data. After installing CT/Testers 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 CTT folder on the C-drive of each of the PCs.

The only items from the installation of CT/Testers necessary to run on each PC are the desktop shortcut icon (with the target address changed to point to the shared location) and the limited version of the program, Access 2007, that is automatically installed in the Program Files folder on your C-Drive. When the first CT/Testers letter or notice is generated from your PC, a new CTT folder will automatically appear on your C-drive that will contain five data source files. See “Customizing the Documents” on pages 29-38.

Getting Started

Company and Setup Information

→ The first time you open or use CT/Testers, you need to enter information about your company and select various setup options.

Start CT/Testers by double clicking the shortcut (icon) on your desktop. The first screen you will see is the main menu (*Figure 2*). From the main menu click the *Company / Set Up* button. This will display the main page of the company information screen (*Figure 3*).

Start by entering the name of your company at the top of the screen (in the blue stripe area), then enter the remaining information. Make sure you enter the contact name and title, and the company 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. See "Customizing the Documents" on pages 29-38.

Hint: The Company name will also appear on the opening page of the program

Hint: After completing the Company / Set Up information, enter Water Systems and Testers before entering Customers and their Test Results because the customer's fields will use information from Water Systems and Testers as drop-down menu choices.

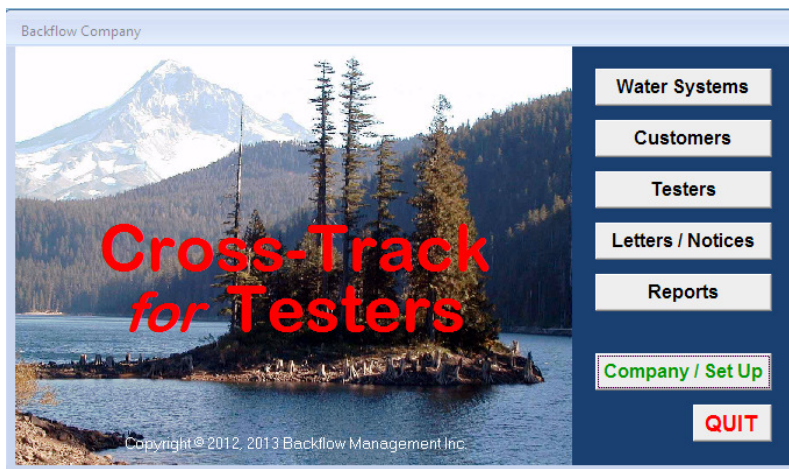


Figure 2. Main Menu

Testing Company / Setup Information

Your Company Name:

MAILING ADDRESS		SITE ADDRESS (if different from mail address)	
# 1:	<input type="text" value="PO Box 793"/>	# 1:	<input type="text" value="17752 NE San Rafael St"/>
# 2:	<input type="text"/>	# 2:	<input type="text"/>
City:	<input type="text" value="Gresham"/>	City:	<input type="text" value="Portland"/>
State/Province:	<input type="text" value="OR"/> <input type="button" value="v"/>	State/Province:	<input type="text" value="OR"/> <input type="button" value="v"/>
Zip:	<input type="text" value="97030"/>	Zip:	<input type="text" value="97230"/>
Phone:	<input type="text" value="(503) 255-1619"/>	Company Contact:	<input type="text" value="Kate Mattimore"/>
Fax:	<input type="text" value="(503) 255-1220"/>	Contact Title:	<input type="text" value="Co-President"/>
E-Mail:	<input type="text" value="bmi@bmibackflow.com"/>	Cell Phone:	<input type="text"/>
Website:	<input type="text" value="www.bmi-backflow.com"/>		

Figure 3. Company Information – Main Page

Company Gauges

Now click on the *Company Gauges* tab to display the next page of the setup information screen (Figure 4). Here you can enter information about each gauge that your company owns or controls. After you enter information about one gauge, click the *New Gauge* button to enter information about another gauge. When you have information for a number of gauges, you can use the left and right arrow buttons to move back and forth between them.

Testing Company / Setup Information

Your Company Name: Backflow Management Inc

Main Page Company Gauges Test Notices, Invoices, Letters Price List for Testing

Gauge Make: Wilkins
Gauge Model: TG-5
GaugeSerial #: 12345
Assigned To: Kahlil Howell

5-valve model with gray carrying case

Calibration History

Date	Company/Technician
10/1/2011	BMI/Garrett Yates
10/8/2012	BMI/Garrett Yates

← Gauge 1 of 1 Find Gauge New Gauge Delete Gauge

Close

Figure 4. Company Gauges

Test Notices, Invoices, Letters

The next tab on the setup screen, labeled *Test Notices, Invoices, Letters*, allows you to control the scheduling of notices relative to the beginning of a test month, to specify terms on invoices, and to select optional statements and letters that can be sent to customers. The numbers and checked boxes shown in *Figure 5* are the defaults, but you can change them.

The screenshot shows a software window titled "Testing Company / Setup Information". At the top, there is a text field for "Your Company Name:" containing "Acme Testing Company, Inc.". Below this is a tabbed interface with four tabs: "Main Page", "Company Gauges", "Test Notices, Invoices, Letters" (which is selected), and "Price List for Testing". The selected tab contains the following settings:

- "Send scheduled test notice:" with a value of "20" days before start of test month.
- "Send test reminder notice:" with a value of "15" days after start of test month.
- A note: "Note: To eliminate scheduled notices/reminders, blank out the number of days."
- "Invoice terms -- please remit within:" with a value of "30" days of invoice date.
- Three checked checkboxes:
 - ☒ Send follow up statements 30/60/90 days after invoice, if still unpaid
 - ☒ Send thank-you letter upon payment in full
 - ☒ Send completed test report forms with thank-you letters
- "Company Contractors License:" with a value of "444-555-666-03".

At the bottom right of the window is a "Close" button.

Figure 5. Test Notices, Invoices, Letters

Price List for Testing

The final tab on the setup screen allows you to establish prices for your testing services. See *Figure 6*. The numbers shown are defaults that are just for illustration purposes; you should change them to reflect your prices. Whatever numbers you enter will be used in program-generated invoices, but you will also be able to change the numbers on each invoice before you print it.

Notice that you can specify different prices based on size for the same assembly type. For example, the price shown in the figure for DCDA is \$62.50 for all sizes. If you were to change the assembly size 12 to 4, you might then enter another line at the bottom of the list specifying a different price for DCDA sizes 5 to 12. The list will be automatically re-sorted once you move off of the setup screen and then come back to it. HINT: Reduce the size range of an assembly 1st before adding a new one to prevent an overlapping conflict.

Testing Company / Setup Information

Your Company Name:

Main Page | Company Gauges | Test Notices, Invoices, Letters | **Price List for Testing**

Assembly Type	Assembly Size	Test Fee
AG	1 to 24	\$38.00
AVB	0.75 to 3	\$45.00
DCDA	2 to 12	\$62.50
DCDA-II	2 to 12	\$62.50
DCVA	0.5 to 12	\$62.50
HBVB	0.5 to 0.75	\$50.00
PVBA	0.5 to 2	\$60.00
RPBA	0.25 to 10	\$60.00
RPDA	2.5 to 10	\$60.00
RPDA-II	2.5 to 10	\$60.00
SVBA	0.25 to 1	\$52.00

Additional fee for confined space:

State Taxes

State	Tax Rate (%)
WA	6.50%
*	

On invoices, automatically include extra line(s) for: ☒ Labor Charge ☒ Parts

Figure 6. Price List for Testing

Water Systems

Returning to the main menu, click the *Water Systems* button to display the water systems information screen (*Figure 7*).

You will need to enter information about each water system supported by your company. If you imported data from Cross-Track 5.x, the water system for that group of customers will have been entered automatically. To enter an additional water system, click the *New* button to clear the screen. Enter the name of the water system at the top of the screen, and then enter the mailing address and other information. If you need to delete a water system, first display the record you want to delete, then click the *Delete* button.

If you support more than one water system, you can move back and forth between the records by clicking the arrow keys. You can also click the *Find* button to display a list from which you can select a water system.

The screenshot shows a software window titled "Public Water Systems". At the top, there is a text field labeled "Water System:" containing the text "Main Street Water Supply". Below this, the form is divided into two main sections. The left section is titled "MAILING ADDRESS" and contains several input fields: "# 1:" with the value "123 Main St", "# 2:" which is empty, "City:" with the value "Portland", "State/Province:" with a dropdown menu showing "OR", "Zip:" with the value "97230", "Phone:" with the value "(503) 255-1619", "Fax:" with the value "(503) 255-1220", and "E-Mail:" with the value "bmi@bmibackflow.com". The right section is titled "Notes" and contains a large, empty text area. Below the "MAILING ADDRESS" section, there are fields for "Contact:" with the value "Kate Mattimore", "Title:" with the value "Backflow Program Coordinator", and "Contact Phone:" with the value "(800) 841-7689". At the bottom of the window, there is a navigation bar with a left arrow, a right arrow, the text "Record 1 of 2", and four buttons: "Find", "New", "Delete", and "Close".

Figure 7. Public Water Systems

Customer Information

From the main menu, click the *Customers* button to display customer information screen (*Figure 8*). The main page includes basic information about each customer. The customer name, water system, and account number appear at the top of the screen. All three are required fields. The account number, which must be unique, may be in any desired format, with or without alphabetic or separator characters.

Customer Information

Customer: Joe Gomez Account #: 123456
Water System: Main Street Water Supply

Main Page Notes List of Assemblies Assembly Details Test Results/History Billing/Payments Photos

MAILING ADDRESS

1: PO Box 700
2:
City: Main
State/Province: OR Zip: 97000

SITE ADDRESS (if different from mail address)

1: 700 Morris St
2:
City: Main
State/Province: OR Zip: 97000
Add Another Site

ACCOUNT INFORMATION

Acct Type: Residential
Acct Contact: Andy Gomez
Acct Phone: (111) 555-6666
Cell Phone: (111) 555-6667
Fax: (111) 555-6668
E-Mail: joe@joe.net

SITE INFORMATION

Block ID: R
Site Contact: Joe Gomez
Site Phone: (111) 222-3333
Cell Phone:
Fax:
E-Mail:

Find Customer New Customer Delete Customer Close

Record: 1 of 79 of 79 No Filter Search

Figure 8. Customer Screen – Main Page

Make sure you enter the customer's 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. Click the *Add Another Site* button to create a new customer account record with the same *customer* information. You must enter a new, unique account number for the new record, and then enter the new site information.

Note: In Account Info, if you enter an account contact name, that name will appear as an “Attn” line on mailing labels and letters.

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 (*Figure 9*) prompting you to search by customer name, account number, mailing address, site address, assembly serial number or contacts. **Note:** This pop-up is displayed automatically when you first display the customer information screen. You can close it by clicking *Cancel* if you want to enter a new customer account.

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

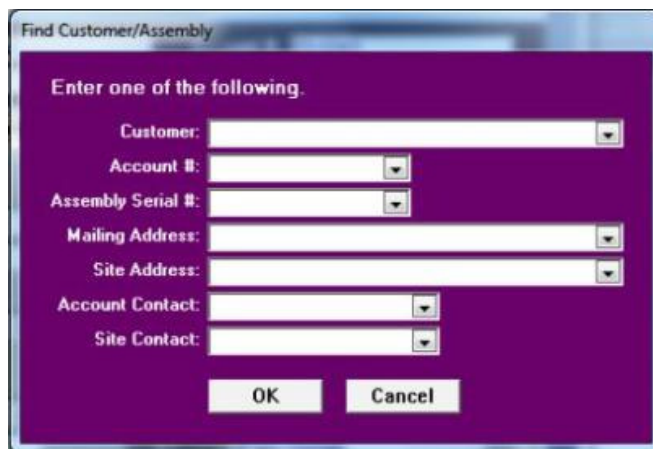
A screenshot of a Windows-style pop-up window titled "Find Customer/Assembly". The window has a dark blue background. At the top, it says "Enter one of the following." Below this, there are seven input fields, each with a label and a dropdown arrow: "Customer:", "Account #:", "Assembly Serial #:", "Mailing Address:", "Site Address:", "Account Contact:", and "Site Contact:". At the bottom of the window, there are two buttons: "OK" and "Cancel".

Figure 9. Find Customer Pop-Up Window

To enter a **new customer** account record, click the *New Customer* button to 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.

Typing Hints

1. When you enter an address, always enter the state or province before entering the zip code. The zip will then be checked for proper US or Canadian format. 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.
3. To activate a drop down list (such as the state/province field in Figure 3) click the down arrow at the right. You may then select one of the options by clicking it. Or you may type directly into the field. Information will be pre-entered as you type. When the pre-entered information displays correctly you can tab to the next field to eliminate typing the entire word.
4. If you overwrite or delete a data field in error, do not change screens. Click the “Esc” button on your keyboard to return the original data or use the back arrow in the upper left area.

Notes

Customer Information

Customer: ARBYS Account #: 12-3456

Water System: Main Street Water Supply

Main Page Notes List of Assemblies Assembly Details Test Results/History Billing/Payments Photos

Account Notes: Manager Jim called 12/10/2011 to report the pop machine will be moved.

Site Notes: Call one day before test date. Turn right on 1st St then right into parking lot. Ring bell at back door to advise mgr. when test will begin.

Find Customer New Customer Delete Customer Close

Record: 6 of 79 No Filter Search

Figure 10. Customer Screen – Notes Page

There are two separate areas for notes in the Customer Information screen:

Account Notes are intended to be used when communicating with the customer or to provide a place for recording issues. These notes are not included in any reports but they can contain helpful information or past history.

Site Notes are intended to be used for site address information such as driving directions and special access needs such as combinations. These notes will appear in the report - *Tests Due by Date Range* – along with all the other needed information to help the tester when on-site.

Note: Before entering a new customer, make sure that the customer's water system is already in the database. If it is not, enter information about the water system (see **Water Systems**) before attempting to enter the new customer.

List of Assemblies

The *List of Assemblies* tab on the customer information screen displays a summary list of assemblies for this account (*Figure 11*). **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.

The screenshot shows a software window titled "Customer Information". At the top, there are fields for "Customer: ARBYS" and "Account #: 12-3456". Below these is a dropdown menu for "Water System: Main Street Water Supply". A tabbed interface is present with the following tabs: "Main Page", "Notes", "List of Assemblies" (which is selected), "Assembly Details", "Test Results/History", "Billing/Payments", and "Photos". The "List of Assemblies" tab contains a table with the heading "Double click to show details". The table has three columns: "Serial #", "Location", and "Next Test". It lists two assemblies: one with Serial # 34809 located "Next to water meter by sidewalk" with a next test date of "Jul 2013", and another with Serial # W3000 located "Pop machine by drive-thru" also with a next test date of "Jul 2013". Below the table is a large empty rectangular area. At the bottom of the window, there are four buttons: "Print/Email Test Report Form", "New Assembly", "Delete Assembly", and "Close". A status bar at the very bottom shows "Record: 6 of 79", navigation icons, "No Filter", and a "Search" field.

Serial #	Location	Next Test
34809	Next to water meter by sidewalk	Jul 2013
W3000	Pop machine by drive-thru	Jul 2013

Figure 11. Customer Screen – List of Assemblies

A **test report form** may also be **printed or emailed from list of assemblies**. To do so, put the cursor on the desired line and then click the *Print/Email Test Report Form* button.

To display additional information about an assembly, either double click a line in the *List of Assemblies* tab, or put the cursor on the line and click the *Assembly Details* tab. Either way, the assembly details page will be displayed.

Assembly Details

The assembly details page is shown in *Figure 12*. Use the right and left arrow buttons (the ones within the page) **to display the various assemblies** for this customer account if there is more than one assembly. You may also **add new** or **delete assemblies** from this screen.

Customer Information

Customer: Joe Gomez Account #: 1234567

Water System: Main Street Water

Main Page Notes List of Assemblies Assembly Details Test Results/History Billing/Payments Photos

Serial #: 1234 Date Installed: 6/14/2012 Next Test: Jun 2013

Make: WILKINS Isolation: In-Premises (Fixture Protection)

Model: 950XLT Hazard Level: Non-Health Hazard

Type: DCVA Protecting Hazard: Irrigation

Size: 1 Confined Space: No Test Interval: 12 Months

Location: Irrigation, left of back porch Map ID

Comments:

Scheduled Test Notice: 5/17/2013 ☐ Sent? ☐ Test Has Been Scheduled

Test Reminder Notice: 6/6/2013 ☐ Sent? ☐ Stop Sending Notices

Assembly 1 of 1 New Assembly Delete Assembly Close

Record: 20 of 78 No Filter Search

Figure 12. Customer Screen – Assembly Details

For assemblies, the serial number and location 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 for your notes and is not included in the letters.

Note: The next test date on the assembly details screen is set automatically upon the successful completion of each test. Tests are normally **scheduled** to occur **once every 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 2012. If the test is not conducted until September 2012, the following annual test will still be scheduled for August 2013. If the test is conducted early, say in June 2012, then the next test will be scheduled for June 2013.

Note: If the next test date is wrong, you can change it on this screen. You should seldom need to do this. Normally, you should allow the system to compute the next test date, which it will do automatically after you enter test results. You can also **set the test interval** to other than 12 months. Make sure you know what the requirements are before you change this interval. Use the format Mmm YYYY Jun 2013.

If you click the **Stop Sending Notices** box, no further warning letters will be sent *for this assembly*. Once a successful test is entered, the box is automatically unchecked and the next test is scheduled.

Entering Dates (Installed or Test)

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:

4/1/12 or 04/01/2012

4-1-2012

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

4/1 is assumed to be 4/1/2012
if this is year 2012

Test Results/History

The *Test Results/History* tab on the customer information screen allows you to **enter the results of an assembly test** and also displays a scrollable summary of information about **past test history** (*Figure 13*). The rectangular area in the lower left part of the screen (with the two tabs) contains information that varies from one type of assembly to another. Figure 13 shows the kind of information that would apply to testing a DCVA assembly.

As with the assembly details screen, you use the left and right arrow buttons to display the various assemblies for this customer account if there is more than one assembly.

When the test results page is first displayed, it will show the results of the previous test if it was a recent test (within the last 90 days). Otherwise, all the test data will be blank to allow you to enter a new test. In any event, you may click the *New Test Report* button on the lower right area to clear the screen for entering a new test.

Customer Information

Customer: Joe Gomez Account #: 1234567

Water System: Main Street Water

Main Page Notes List of Assemblies Assembly Details Test Results/History Billing/Payments Photos

Serial #: 1234 Type: DCVA Irrigation, left of back porch

Initial Test Date: 6/14/2012

Tester: Kahlil Howell

Lic. No: 1234567890

Gauge: 05051357

Double click to show details.

Test Date	Result	Tester
6/14/2012	Passed	Kahlil Howell

☒ Installation Correct ☒ Approved Assembly ☐ Air Gap Verified & Correct

Initial Test Results Re-Test Results

☐ Type II Bypass Check

Check #1: ☒ Tight ☐ Leaked Check #2: ☒ Tight ☐ Leaked

PSID: 2.8 PSID: 2.4

#2 SOV: ☐ Tight *

Overall Test: ☒ Passed ☐ Failed System PSI: 76

* Only if required under test proce Detector Meter:

Record: 14 of 20 of 78 No Filter Search

Figure 13. Customer Screen – Test Results/History

To enter a new test, make sure you enter the initial test date, the tester's name, gauge number, and then enter (or check) all the information for the initial test results. If the test was successful, make sure you check the *Overall Test – Passed* box. This will cause the next test to be scheduled automatically, and will also trigger an entry in the customer's invoice.

Note: Use entry fields that apply to accepted test procedures.

If the test failed, you will need to enter more information once a successful re-test has been done. **To enter the re-test results**, come back to the same screen with the same initial test date, and then click the *Re-Test Results* tab where you can enter the final (successful) results and check the *Overall Test – Passed* box.

If you want to **see the results of a previous test**, find it in the (scrollable) history list, and double click the test date on that entry. This will cause the results of that test to be displayed.

Billing/Payments

The *Billing/Payments* tab on the customer information screen allows you to **generate and send invoices** to your customers and **to record their payments** (*Figure 14*).

Any completed tests for this customer account that have not been previously billed will show up automatically on the invoice, and the fee will be filled in automatically based on your price list for the assembly type and size (refer back to *Figure 6*). Additional lines will be provided for you to enter labor and parts charges if you checked those two boxes on the price list page (again, see *Figure 6*).

You can modify the location/description, the fee, and the confined space check box on any line, and you may add and delete lines. **To add a line**, simply type into the blank line at the bottom of the list. **To delete a line**, click the square area at the left of the serial number, and then press the delete key on the pc keyboard. **To include a tax**, enter the tax percentage in the *Tax at* field. The tax amount will then be computed automatically.

The tax field can also be used as a discount field by applying a negative percentage and editing the invoice form to change Tax to Discount.

When you have completed the invoice, click the *Send Invoice* button. A pop-up window will be displayed to allow you to print the invoice or email it directly to the customer. If you want to do both, simply click the *Send Invoice* button twice – once to select printing and once to select emailing.

To record a payment for an invoice, bring up the original invoice and enter the date and amount of the payment in the area provided near the bottom of the page. If it is a partial payment, you may enter subsequent payments on additional lines in the payment area. The total amount paid and remaining due will be calculated automatically.

Customer Information

Customer: Joe Gomez Account #: 1234567
Water System: Main Street Water

Main Page Notes List of Assemblies Assembly Details Test Results/History **Billing/Payments** Photos

Invoice #: 3458 Invoice Date: 2/22/2013

Serial #	Location/Description	Confined Space	Fee
▶ 1234	Irrigation, left of back porch	<input type="checkbox"/>	\$62.50
	Labor charge	<input type="checkbox"/>	
	Parts	<input type="checkbox"/>	
*		<input type="checkbox"/>	

Date Paid	Amount
▶ 7/30/2012	\$50.00
*	
Total Paid:	\$50.00

Subtotal: \$62.50
Tax at: \$0.00
Invoice Total: \$62.50
Remaining Due: \$12.50

◀ ▶ Send Invoice New Invoice Delete Invoice Close

Record: 19 of 76 No Filter Search

Figure 14. Customer Screen – Billing/Payments

Photos

The *Photos* tab of the customer information screen is shown in *Figure 15*. 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 CTT (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 or 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.

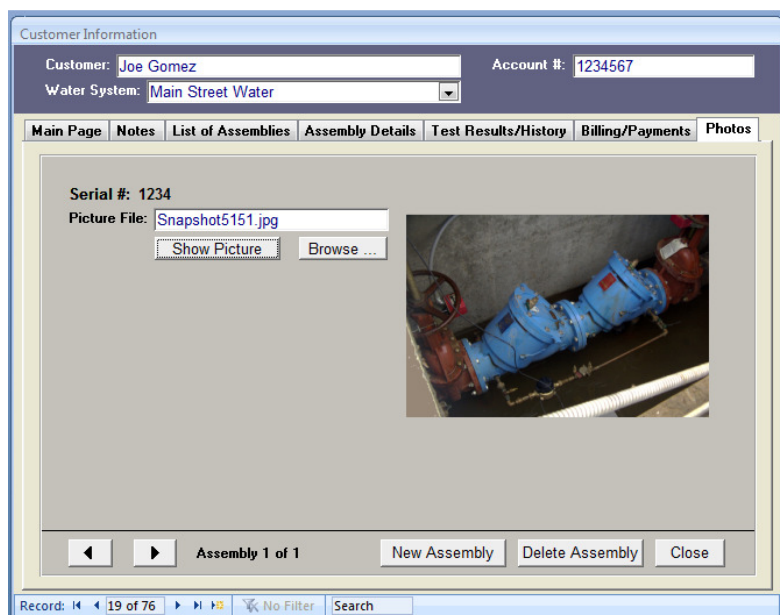


Figure 15. Customer Screen – Photos

Testers

Click the *Testers* button on the main opening page menu **to display the tester information** screen (Figure 16). The main tester page includes basic information about the tester.

The screenshot shows a web application window titled "Tester Information". At the top, there is a "Tester Name:" field with the value "Kahlil Howell" and two radio buttons labeled "Employee" (selected) and "Contractor". Below this is a tabbed interface with "Main Page" and "Certification" tabs. The "Main Page" tab is active, displaying a form for a tester's information. The form includes a "HOME ADDRESS" section with fields for "Address:" (111 Main St), "City:" (Gresham), "State/Province:" (OR), and "Zip:" (97030). There are also fields for "Phone:" ((111) 222-3333), "Cell:" ((222) 333-4444), and "E-Mail:" (khowell@bmibackflow.com). To the right of the address fields is an "Active:" dropdown menu set to "Yes" and a "Comments:" text area. At the bottom of the form are four buttons: "Find Tester", "New Tester", "Delete Tester", and "Close". Below the buttons is a status bar showing "Record: 17 of 27", a "No Filter" button, and a "Search" field.

Figure 16. Tester Information – Employees

To search for a particular tester, click the *Find Tester* button at the bottom of the page. This will display a pop-up window prompting you to enter a tester name or scroll through the drop down list. 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.

You may want **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 List report.

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, and then click the *Delete Tester* button.

If the **tester is an employee** of your testing company, the main page will include the tester's name and home address, as shown in *Figure 16*. If the **tester is a contractor**, however, the main page will include the contractor's company name and company address as shown in *Figure 17*.

The remaining tabs on the tester information screen allow you to enter **additional information about the tester**, including certification and, for contractors, gauges and insurance.

Tester Information

Tester Name: Bob Robert

☒ Employee ☐ Contractor

Main Page Certification Contractor Gauges Contractor Insurance

Company: Bob's Backflow

Address: 111 1st St

City: Portland

State/Province: OR Zip: 97230

Phone: (123) 111-2222

Fax: (123) 111-2223

E-Mail: bob@bob.com

Active: Yes

Comments:

Contact: Bob Boss

Contact Phone: (123) 111-2224

Cell/Pager: (123) 111-2225

Find Tester New Tester Delete Tester Close

Record: 3 of 27 No Filter Search

Figure 17. Tester Information – Contractors

Letters/Notices

From the main menu, click the *Letters/Notices* button to display the selection screen shown in *Figure 18*. This screen shows the number of **documents** that are **currently scheduled to be printed**. It also gives you an **option of printing documents only, printing mailing labels only, printing both, or emailing the document**.

Due	Document
19	Scheduled Test Notices
0	Test Reminder Notices
0	30 Day Statements
0	60 Day Statements
1	90 Day Statements
1	Thank You Letters
19	Test Report Forms - Due for Testing Now
1	Recently Completed Test Reports
	Last Completed Test Reports (Any Customer)

Options

☐ Print Documents and Labels

☐ Print Documents Only

☐ Print Labels Only

☒ Email Documents

Proceed Reset/Reprint Close

Figure 18. Letters/Notices Selection

The *Due* column on letter/notices screen shows the number of *customers* who are due to receive letters, or notices. For test reports, however, the due column shows the number of *assemblies*.

To print or email a document, first select which of the four print/email Options you want. Next select the document by clicking/highlighting it in the list then click the *Proceed* button. A screen will be displayed listing the customers who will receive the document (*Figure 19*). The check boxes down the left-hand side allow you to control which letters are to be printed or emailed 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 “50” to any number you want). When you click the *Proceed* button on this screen, the checked letters will be printed or emailed and the current date will be automatically recorded as the date sent.

Note: Click the *Print Screen* button to print just the list as shown above to keep for your records file. The list will have a date at the bottom so you know when the letters were sent to each customer.

If you are **emailing test reports**, a pop-up window will be displayed that allows you to control which recipients will receive the reports (*Figure 20*). Sometimes a document will appear (flashing) in the lower tray of your desktop screen. If so, click on it to open and if your pc security asks to allow or deny, select allow (depending on your operating system and software version, it may ask twice to allow).

Hint: make sure you enter email addresses for customers, water systems and testers and that they are correct.

List of Recipients

Scheduled Test Notices will be sent to each selected customer

Pick	Customer	Account #	Mailing Address	# Asm Due
<input checked="" type="checkbox"/>	BL-LO Inc	44444	111 Glenwood Ave, Main, OR 97000	1
<input checked="" type="checkbox"/>	City of Main	3333	PO Box 111, Main, OR 97000	1
<input checked="" type="checkbox"/>	City of Water	5566	PO Box C, Water, OR 97000	2
<input checked="" type="checkbox"/>	Farr Away Cars	8899	40 1st Street, Main, OR 97000	1
<input checked="" type="checkbox"/>	Fiber Forms	4000	1000 Kyle Ln, Main, OR 97000	1
<input checked="" type="checkbox"/>	Fiber Forms	40001	1000 Kyle Ln, Main, OR 97000	1
<input checked="" type="checkbox"/>	Fire Dept	5557	4000 School St, Main, OR 97000	1
<input checked="" type="checkbox"/>	Friendly Baptist Church	400002	4999 Hardworking Rd, Main, OR 97000	1
<input checked="" type="checkbox"/>	Janice Olds	57907	3001 Cleveland Rd, Main, OR 97000	1
<input checked="" type="checkbox"/>	Joe Gomez	299999-0	PO Box 700, Main, OR 97000	2
<input checked="" type="checkbox"/>	McDonald's	58816	PO Box 2500, Los Angeles, CA 92000	4
<input checked="" type="checkbox"/>	Mike Smith	5679	5050 Center St, Main, OR 97000	1
<input checked="" type="checkbox"/>	Oven Appliances	10000	101 Glenwood Ave, Main, OR 97000	1
<input checked="" type="checkbox"/>	Pain Management	29220	203 Walnut Ave, Main, OR 97000	1
<input checked="" type="checkbox"/>	Walnut Ave Company	8000	14099 Turner Rd, Main, OR 97000	4

Select: ☒ All ☐ None ☐ First 50

Print Screen Proceed Cancel

Figure 19. List of Recipients

Email To

Select email recipients for test reports.

Email To

☒ Customers

☐ Water system(s)

☐ Tester:

OK Cancel

Figure 20. Select Email Recipients

Occasionally you may need to **reprint/resend documents**. To do this, first select the type of document on the letter/notices selection screen (*Figure 18*) and then click the *Reset/Reprint* button. A pop-up window will be displayed (*Figure 21*) showing you the last date letters of this type were printed.

The first option (mark them all as not sent) is appropriate if you need to **reprint/resend the entire batch** and change the date they were printed. All of them will then show up as “due” on the letters selection screen.

If you want to **reprint/resend selected letters**, choose the second option, *Display List*. The list of recipients (*Figure 19*) will then be displayed for the original batch of letters, and you can check the ones you want to reprint or re-email.

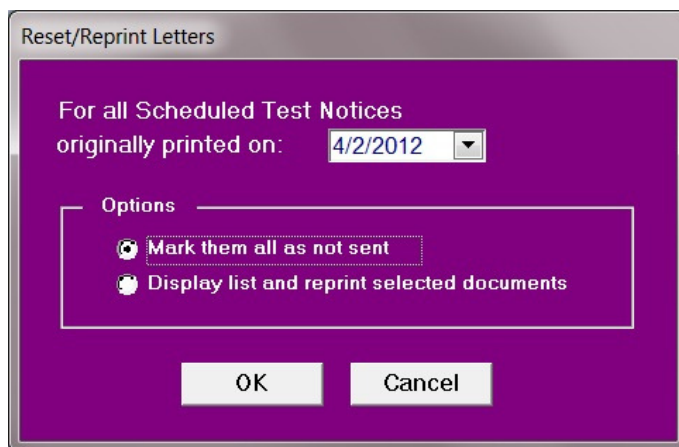


Figure 21. Reprint/Reset Letters Pop-up Window

Reports

Click the *Reports* button on the main opening page menu to display the report selection screen (Figure 22). To **select a report**, click or highlight it on 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.

A few of the reports will require a range of desired dates to be entered to generate the report, such as the Tests Due by Date Range. A pop-up box will appear as a prompt to enter the starting and ending dates.

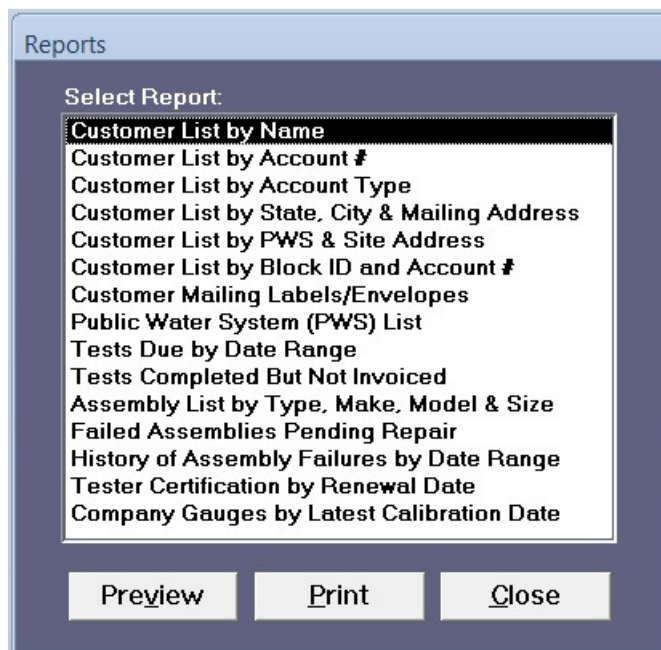


Figure 22. Report Selection

Customizing the Documents

The **customizable documents** are stored as mail merge document **templates** (.dot) files in the folder CTT\Letters folder on your C-drive (or on a shared drive if you have a shared usage installation). You may modify them using Microsoft Word, version 2000 or later. You can import your letterhead, change the wording, insert a signature and add or delete mail merge fields.

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

Before you can modify a distributed document, you must insure that its data source file is available. To do this, simply print a sample of the document in its original format. This will cause a source file for that document to be stored in the CTT folder on your C-drive (even if you have a shared usage installation, the data source files for mail merge will be on *your* C-drive).

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

- Data Source1.txt – for scheduled/reminder test notices
- Data Source2.txt – for invoices
- Data Source3.txt – for test reports
- Data Source4.txt – for 30/60/90 day statements
- Data Source5.txt – for thank-you letters

The merge fields in each of these files are shown in the tables that follow. Some of these merge fields are not used in the distributed version of the documents. You may include any of the available merge fields when customizing a document.

Caution: When you open a document template, do not open it by double clicking it in the Letters subfolder. If you do, Microsoft Word will attempt to change it from a .dot file to a .doc or .docx type file. Instead, open it only in either of the following ways:

- Right-click the document in the Letters folder and then select Open, or
- Open a blank Word document, go to the file dropdown menu, select Open, and then navigate to the document template in the CTT folder, Letters subfolder, highlight or single click on the letter, notice or form you want to edit and then click Open.

Using the two methods above should eliminate the change of file type and name. When opening the template, a warning will pop up about “SQL”, just click on ok or yes as this only places a date on the letter

Once you open a document template, you may need to display the mail merge tools in Microsoft Word to highlight or insert mail merge fields and to preview the results of a mail merge. In the current version of Word, you do this by clicking the *Mailings* tab in the upper menu ribbon. In earlier versions, you may need to go to the *View* menu, select *Toolbars*, and then check *Mail Merge* to add the toolbar to the upper menu options.

Once you have completed the edits, do not “Save” or “Save As”. Just close the document template by clicking the upper right red “x”. A prompt will ask if you want to save your changes. Click “Yes”.

<i>Category</i>	<i>Merge Field Name</i>	<i>Comments</i>
Your Company	CompanyName	
	CompAddress	
	CompCity	
	CompState	
	CompZip	
	CompPhone	
	CompFax	
	CompEmail	
	CompanyContact	
	ContactTitle	
	ContactCellPhone	
	ContractorsLicense	
	Invoice_Terms_Days	
Public Water System	ServiceDistrict	District Name
	EmailPWS	District Email
Customer Info	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

Table 1. Merge Fields in Data Source1

(Continued on next page)

<i>Category</i>	<i>Merge Field Name</i>	<i>Comments</i>
Assembly Information	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 (continued). Merge Fields in Data Source1

Note: An unlimited number of assemblies can be entered and stored in the Customer Info tab, however, when printing letters or notices, up to 10 assemblies will be included on a letter. If there are more, other letters will be automatically generated to include all the assemblies.

<i>Category</i>	<i>Merge Field Name</i>	<i>Comments</i>
Your Company	CompanyName	
	CompAddress	
	CompCity	
	CompState	
	CompZip	
	CompPhone	
	CompFax	
	CompEmail	
	CompanyContact	
	ContactTitle	
	ContactCellPhone	
	ContractorsLicense	
	Invoice_Terms_Days	
	InvNum	Invoice Number
Invoice	InvDate	Invoice Date
	Subtot	Invoice Subtotal
	TaxAmt	Tax Amount
	InvTotal	Invoice Total
Customer Info	CustomerName	
	MAddress1	Mailing Address
	MAddress2	
	MCity	
	MState	
	MZip	
	SAddress1	Site Address
	SAddress2	
	SCity	
	SState	
	SZip	
	Contact	Account Contact Name
	AttnLine	"ATTN: " plus Account Contact Name
	EMail	Account Email
	AccountID	Account Number
	InvoiceID	Unformatted InvNum
	SerialNumber (x12)	Serial, Location, and Amount for up to 12 assemblies
	Location (x12)	
	Amt (x12)	

Table 2. Merge Fields in Data Source2

<i>Category</i>	<i>Merge Field Name</i>	<i>Comments</i>
Public Water System	ServiceDistrict	District Name
	EmailPWS	District Email
Customer Info	CustomerName	
	AccountID	Account Number
	MAddress1	Mailing Address
	MAddress2	
	MCity	
	MState	
	MZip	
	SAddress1	Site Address
	SAddress2	
	SCity	
	SState	
	Phone	Account Phone
	EMail	Account Email
Assembly Info	SerialNumber	
	Location	
	ProtectingHazard	
	Make	
	Model	
	AsmSize	
	AsmType	
Tester Information	TesterName	
	TesterEmail	
	TesterCompany	
	TesterAddress	
	TesterCity	
	TesterState	
	TesterZip	
	TesterPhone	
	TesterCert#	
	GaugeID	
	CalibrationDate	

Table 3. Merge Fields in Data Source3

(Continued on next page)

<i>Category</i>	<i>Merge Field Name</i>	<i>Comments</i>
Check Boxes	A	New Asm
	B	Existing Asm
	C	Replaced Asm
	D	Removed Asm
	E	Confined Space
	F	Installation Correct
	G	Approved Asm
	H	Air Gap Verified
Initial Test Results	InitialTestDate	Initial Test Date
	Ck1Drop	Check1 Drop PSID
	ReliefOp	Relief Open PSID
	Buffer	Buffer PSID
Check Boxes (cont'd)	I	Relief Valve Passed
	J	Relief Valve Failed
	W	Type II Bypass Check
	K	Check1 Tight
	L	Check1 Leaked
Initial Test Results	C1	Check1 PSID
	M	Check2 Tight
	N	Check2 Leaked
Initial Test Results	C2	Check2 PSID
	SOV	SOV #2 Tight (ASSE)
	PVP	VB AI Opened PSID
	O	VB AI Did Not Open
	SVP	VB Drop PSID
	P	VB Check Leaked
	PT	VB Check Tight
	Q	Initial Test Passed
	R	Initial Test Failed
	SysPS	System PSI
	DetMeter	Det Meter Reading
	Comments	Comments & Notes

Table 3 (continued). Merge Fields in Data Source3
(Continued on next page)

<i>Category</i>	<i>Merge Field Name</i>	<i>Comments</i>
Retest After Repair	RT_TestDate	Retest Date
	R_Ck1Drop	Check1 Drop PSID
	R_ReliefOp	Relief Open PSID
	R_Buffer	Buffer PSID
	S	Relief Valve Passed
	X	Type II Bypass Check
	T	Check1 Tight
	R1	Check1 PSID
	U	Check2 Tight
	R2	Check2 PSID
	RPV	VB Opened PSID
	RSV	VB Drop PSID
	V	System Passed
	Y	Water Restored
	ContractorLicense	Tester

Table 3 (continued). Merge Fields in Data Source3

Note: Some accepted test procedures may not use the calculated buffer value, a checkbox for the tightness of Shut-off valve #2 or a value for the #2 Check Valve on an RP. The test report form can be edited (see *Customizing the Documents* section) to delete these pre-typed entries and also delete any un-needed data merge fields. Be sure to confirm what is required on test report forms within your jurisdiction.

<i>Category</i>	<i>Merge Field Name</i>	<i>Comments</i>
Your Company	CompanyName	
	CompAddress	
	CompCity	
	CompState	
	CompZip	
	CompPhone	
	CompFax	
	CompEmail	
	CompanyContact	
	ContactTitle	
	ContactCellPhone	
	ContractorsLicense	
	Invoice_Terms_Days	
	CustomerName	
Customer Info	MAddress1	Mailing Address
	MAddress2	
	MCity	
	MState	
	MZip	
	Contact	Account Contact Name
	AttnLine	"ATTN: " plus Account Contact Name
	EMail	Account Email
Statement Data	StmtDate	Statement Date
	AccountID	Account Number
	InvoiceID	Unformatted InvNum
	Date (x8)	Date, Description, and Amount for up to 8 lines
	Description (x8)	
	Amt (x8)	
	TotAmt	Total Amount (\$)

Table 4. Merge Fields in Data Source4

<i>Category</i>	<i>Merge Field Name</i>	<i>Comments</i>
Basic Info	LetterDate	
	InvoiceNumber	
Your Company	CompanyName	
	CompAddress	
	CompCity	
	CompState	
	CompZip	
	CompPhone	
	CompFax	
	CompEmail	
	CompanyContact	
	ContactTitle	
	ContactCellPhone	
	ContractorsLicense	
	Invoice_Terms_Days	
Public Water System	ServiceDistrict	District Name
Customer Info	CustomerName	
	MAddress1	Mailing Address
	MAddress2	
	MCity	
	MState	
	MZip	
	SAddress1	Site Address
	SAddress2	
	SCity	
	SState	
	SZip	
	Contact	Account Contact Name
	AttnLine	"ATTN: " plus Account Contact Name
	Email	Account Email

Table 5. Merge Fields in Data Source5

Back-up Your Data

Most shared usage installations, such as those installed on a local area network server that connects multiple PC's, may have an automated back-up system. Verify if you have shared usage and if your data is backed up automatically. If you do have some type of automated back-up system you may not need to follow the suggestions below to protect your data in the case of a crashed PC or mistakenly deleted folders and files.

The Cross-Track for Testers software **program** is easily replaceable. The trial version can be re-downloaded from the BMI web site or you can contact us for replacement of or unlocking the program when you are confirmed as a registered user.

Your data and any customized letters, notices or forms should be backed up on at least one or more other storage or removable drives such as a CD, flash drive or separately connected hard drive unit.

Saving the Database

You will first need to determine where Cross-Track for Testers was installed on your PC:

The default installation location is a folder on your C-drive named **CTT**.

Within that folder is the database named **CT_Tester.mdb** and it is the largest size of all components in this folder.

Copy this .mdb to a removable drive.

If you can't easily locate the CT_Tester.mdb file, locate the shortcut icon for the program on your desktop, as shown below.



Right click on the icon, select Properties and look at the target address to find the path such as C:\CTT\CT_Tester.mdb", where C is the drive, CTT is the folder and CT_Tester.mdb is the data. Then navigate to My Computer, open the C-drive, open the CTT folder and find the mdb to copy and save in another safe location.

Saving Letters, Notices and Forms

Also within the CTT folder is another folder named Letters. If you edited or customized any of these documents, then you may also want to copy and save this entire folder using the same process as described for the mdb. If you did not customize any of these documents then you do not need to do this step as these program documents will be included with the replaced program. They can also be easily re-edited so saving a hard copy of each letter or form is a good idea.

Software License Agreement

BY THE USE OF THIS SOFTWARE YOU AGREE TO BECOME BOUND TO THE TERMS OF THIS AGREEMENT.

This software (Cross-Track for Testers) is the property of Backflow Management Inc. (BMI). BMI only licenses the software's use in the United States and does not transfer ownership of this copy. The licensee owns the disks upon which the software is recorded, but BMI retains ownership of the software itself. The licensee assumes responsibility for the selection of the software to produce your intended goals and for installation, use and results obtained from the software.

1. **LICENSE** – This license allows you to copy this software in machine readable form only as necessary to individually use it within a single local area network and as necessary to create one archive copy of this software. These are your rights.
2. **RESTRICTIONS** – You must not sell, rent, loan, lease, share on another network (other than your own local area network), or the Internet, modify, adapt, reverse engineer, decompile, translate, or create derivative works based upon this software.
3. **TERMINATION** – This license is effective until terminated. This license is terminated by any violation of the provisions of this agreement.
4. **LIMITED WARRANTY** – BMI warrants to the licensee that its software, if properly installed on a computer for which it is designed, will perform in accordance with specifications set forth in the usage guide accompanying this software.

This warranty exists from the date of delivery to licensee and is good until ninety (90) days thereafter. BMI's

entire liability and our sole and exclusive remedy for any breach of the limited warranty will be, at BMI's option, repair or replacement of the software disks.

THIS LIMITED WARRANTY IS THE ONLY WARRANTY PROVIDED BY BMI. BMI AND ITS LICENSEES EXPRESSLY DISCLAIM ALL OTHER WARRANTIES, EITHER EXPRESSED OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, IMPLIED WARRANTIES OR MERCHANT ABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

5. **LIMITATIONS** – In any case, BMI, its directors, officers, and employees, shall not be liable for loss of data, loss of profit, lost savings, special, consequential, direct, or indirect damages arising from a breach of warranty, breach of contract, negligence, or any claim by any other party. Because some jurisdictions do not allow the limitation of implied warranties, the above may not apply to you.
6. **GENERAL** – This licensee will be governed under the laws of the State of Oregon except as to copyright and other proprietary matters which may involve United States laws and international treaties. In the event of any dispute involving this license, the licensee consents to exclusive jurisdiction and venue in either state or federal courts in Oregon and agrees that the prevailing party shall be entitled to its attorney's fees and costs. Should any provision of this agreement be deemed void or unenforceable, such provision shall be modified to make it valid and enforceable and so modified, the entire agreement shall remain in full effect.