# Cross-Track for Testers

# Installation and Users Guide

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# 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.

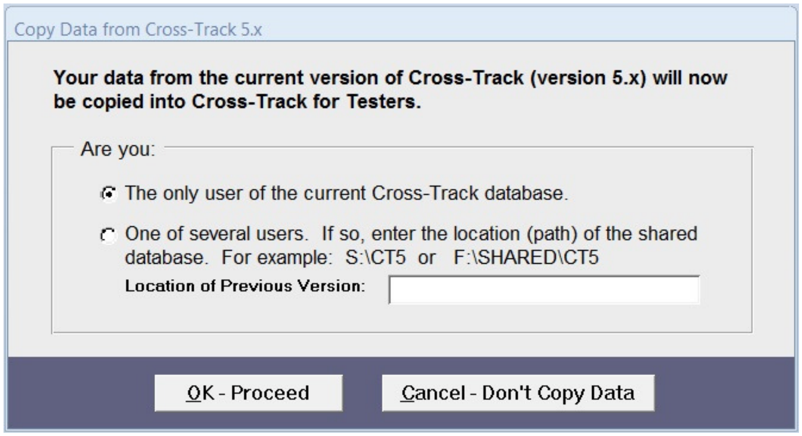


***Figure 1.* Copy Data from Cross-Track 5.x**

**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.

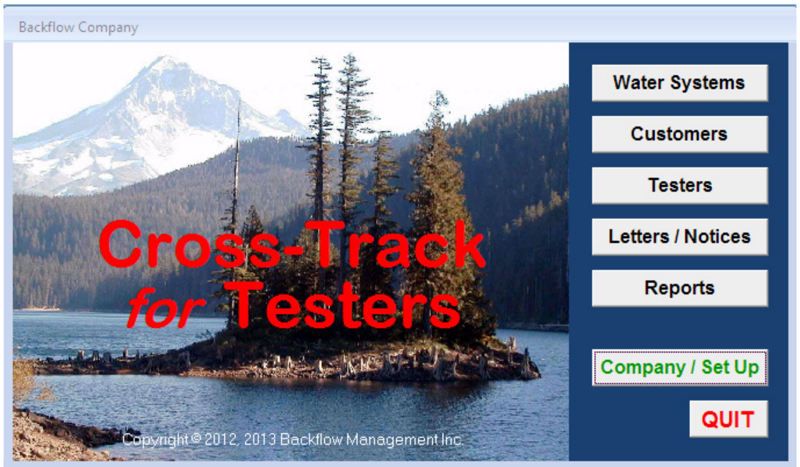


***Figure 2.*** **Main Menu**

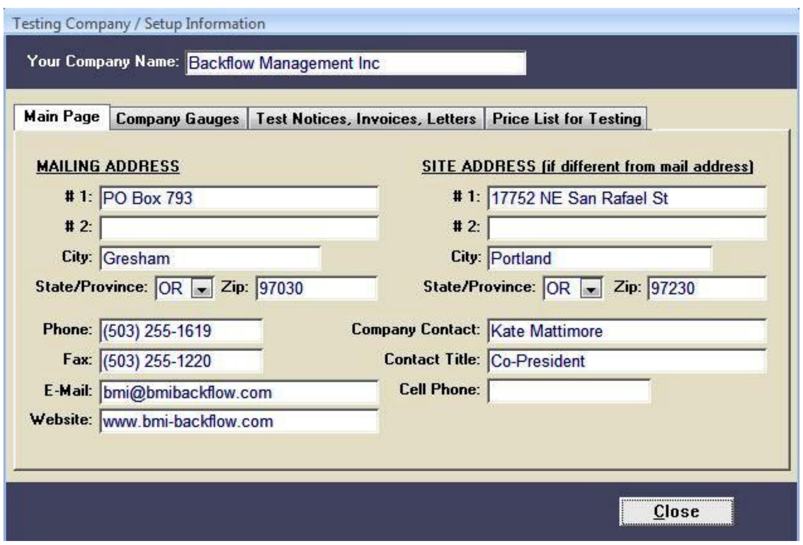


***Figure 3.*** **Company Information – Main Page**

## *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.

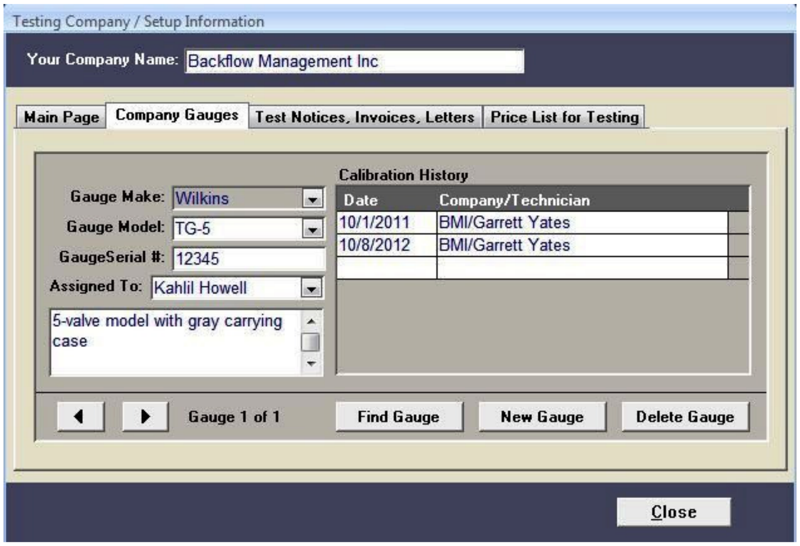


***Figure 4.*** **Company Gauges**

 

## *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.

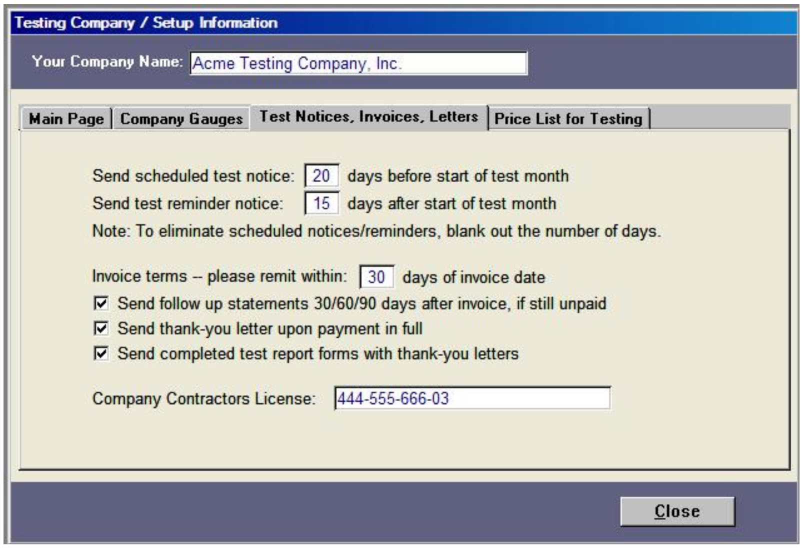


***Figure 5.*** **Test Notices, Invoices, Letters**

## *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.

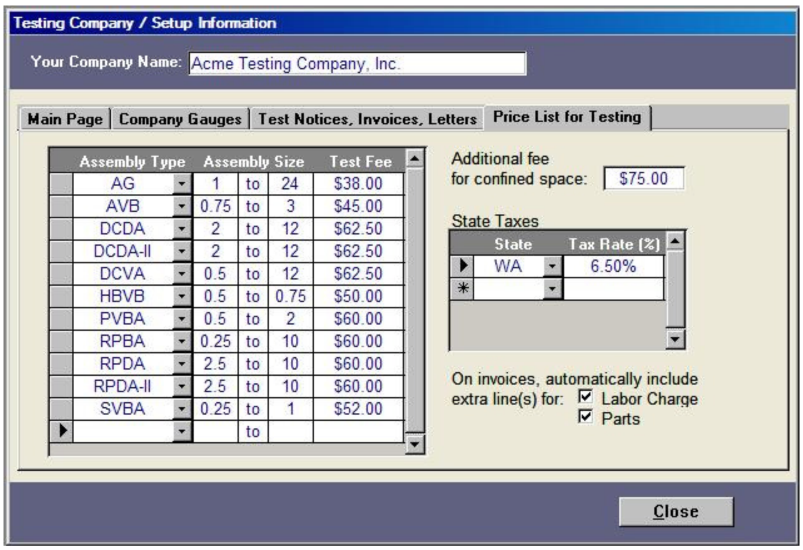

*Figure 6*. **Price List for Testing**

## 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.


**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.

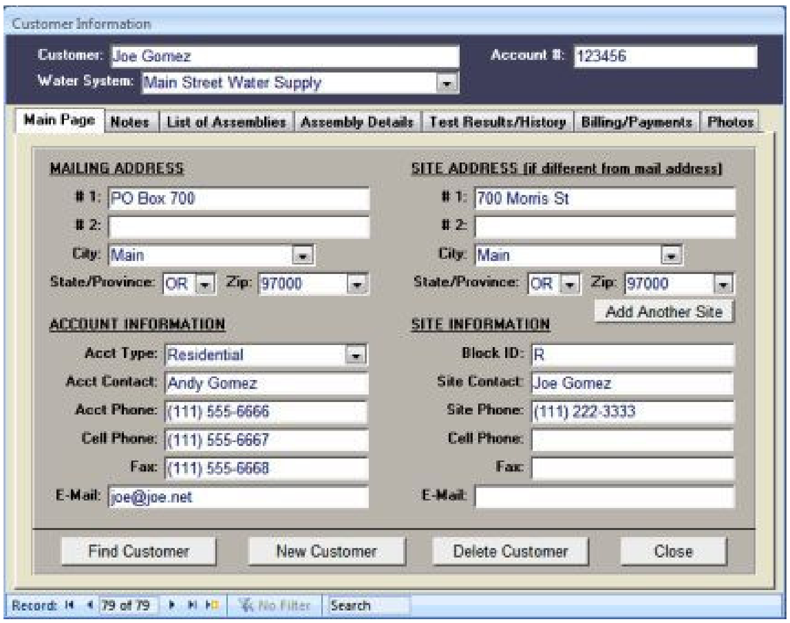


***Figure 8.* Customer Screen – Main Page**

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:".


***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*

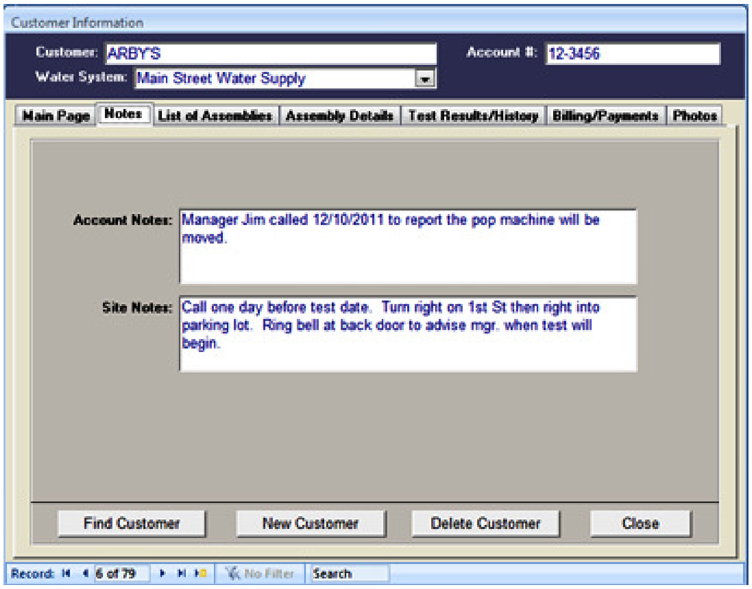


***Figure 10.* Customer Screen – Notes Page**

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.

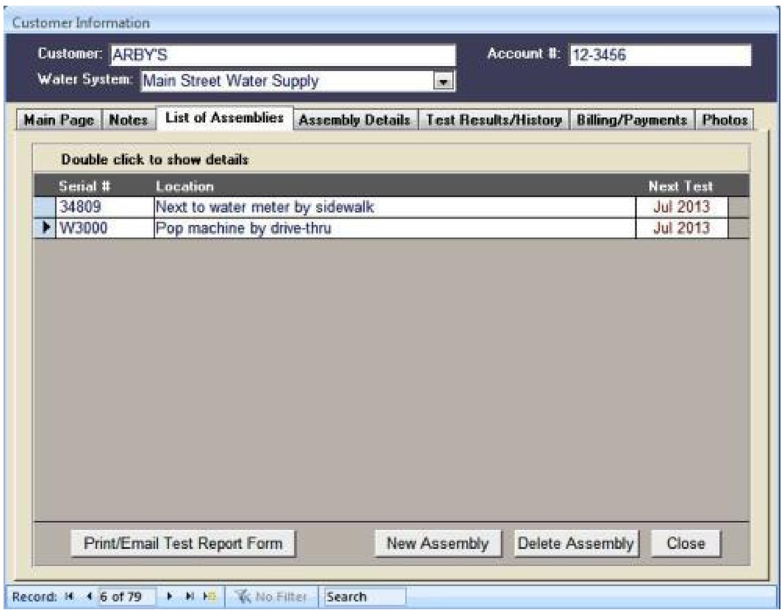


***Figure 11.* Customer Screen – List of Assemblies**

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.

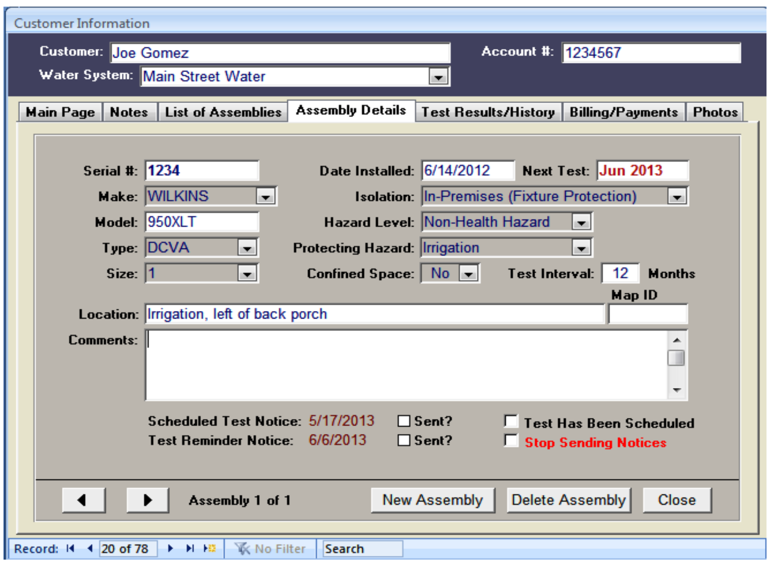

***Figure 12.*  Customer Screen – Assembly Details**

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 than12 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. Your 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.

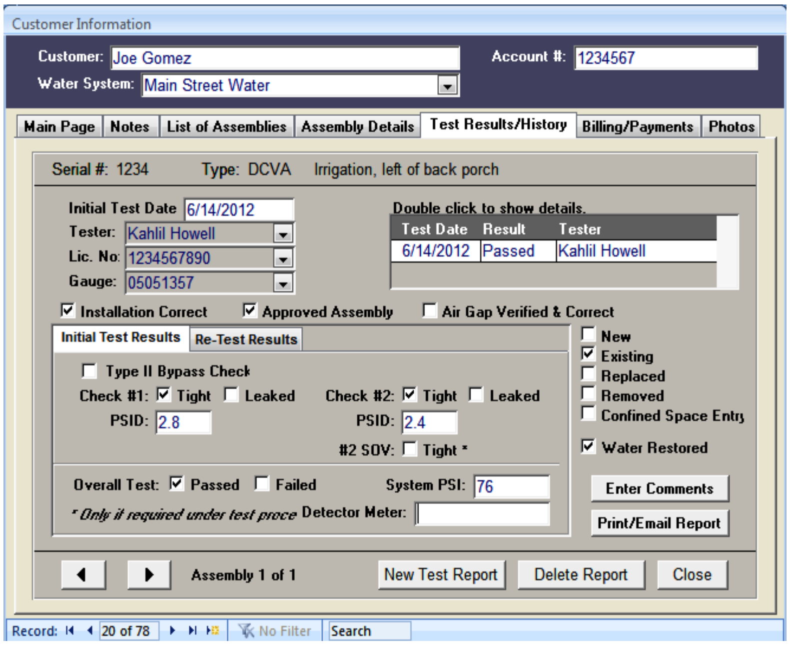


***Figure 13.* Customer Screen – Test Results/History**

**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.

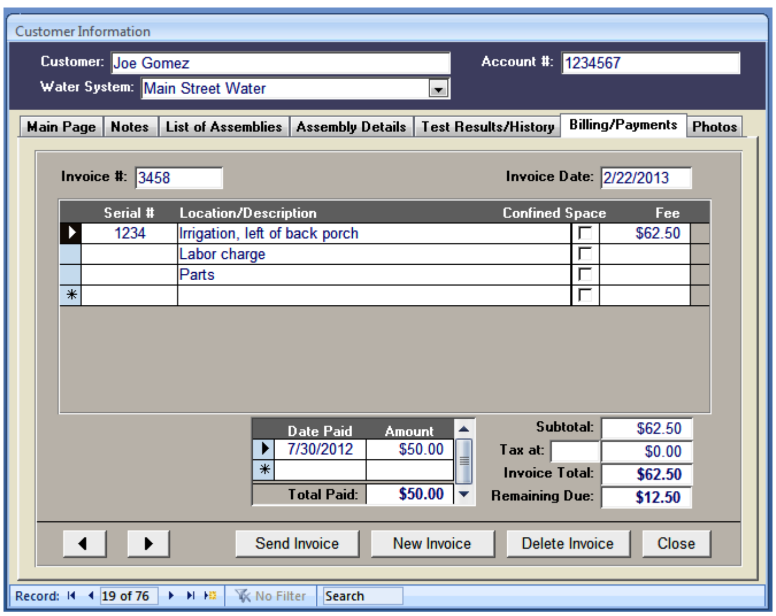


***Figure 14.* Customer Screen – Billing/Payments**

## *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.

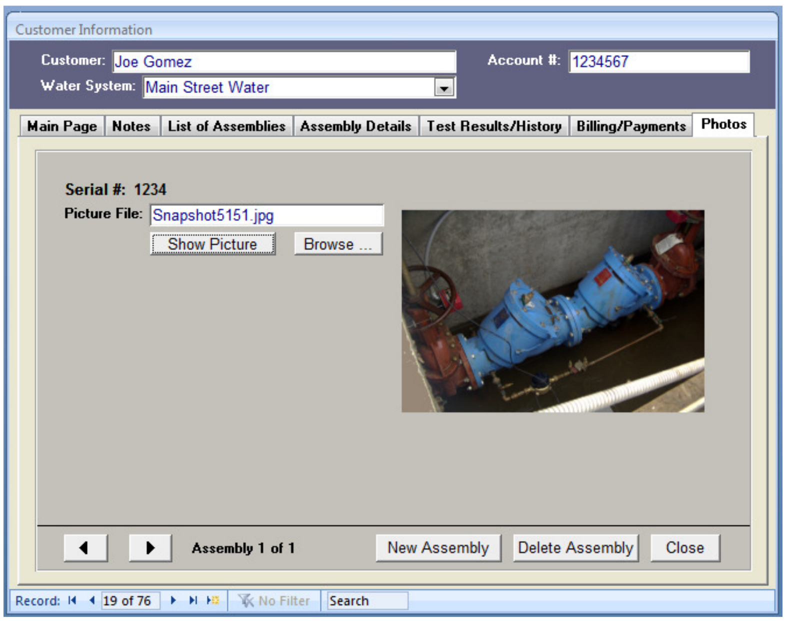


***Figure 15.*** **Customer Screen – Photos**

## *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.

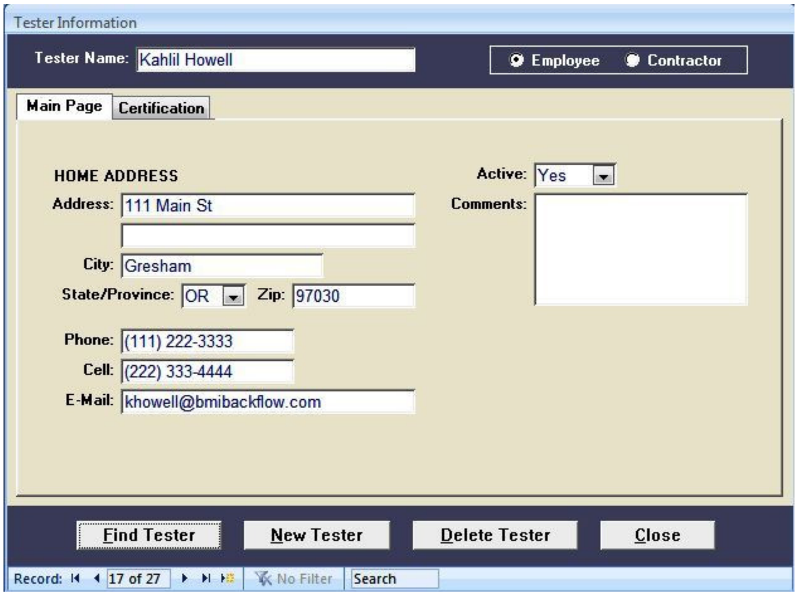


***Figure 16.*** **Tester Information – Employees**

**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.

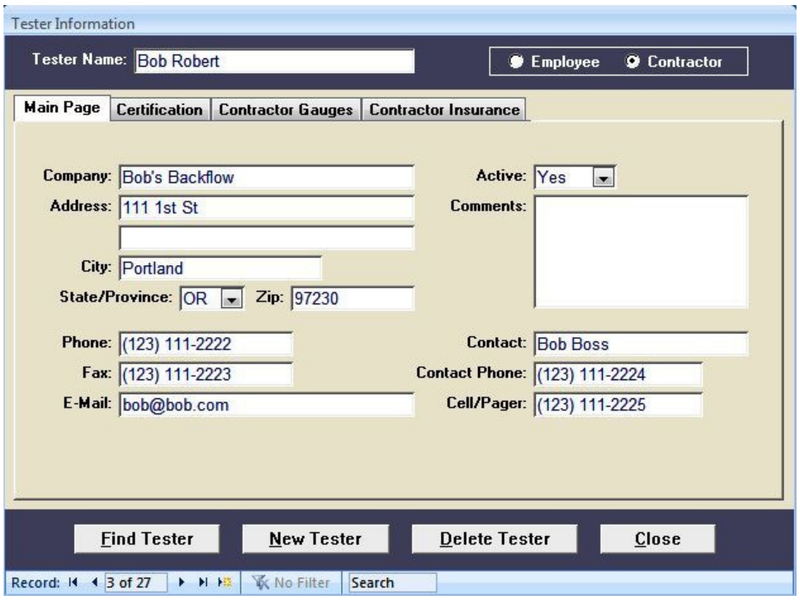


***Figure 17.*** **Tester Information – Contractors**

# 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.**

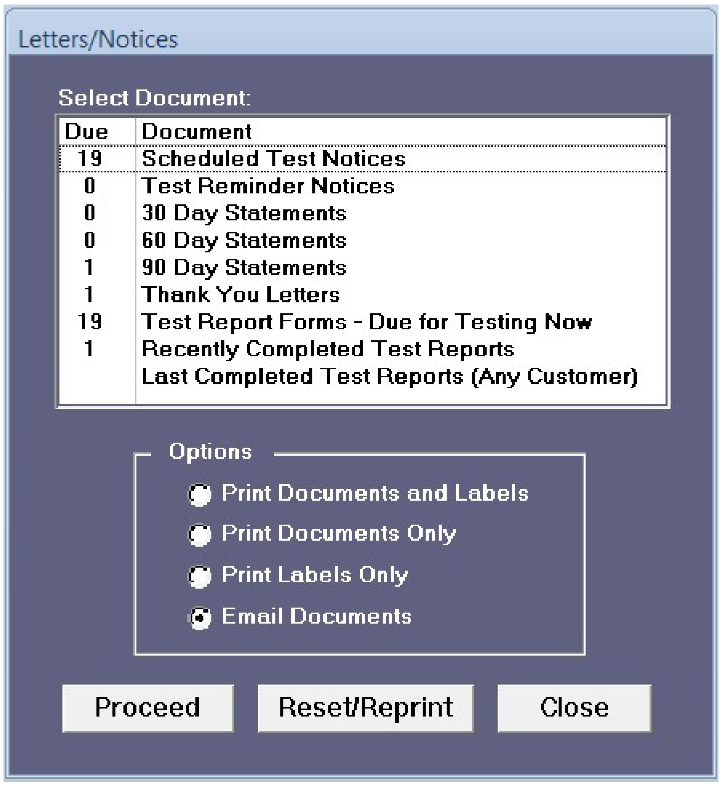


***Figure 18.*** **Letters/Notices Selection**

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.

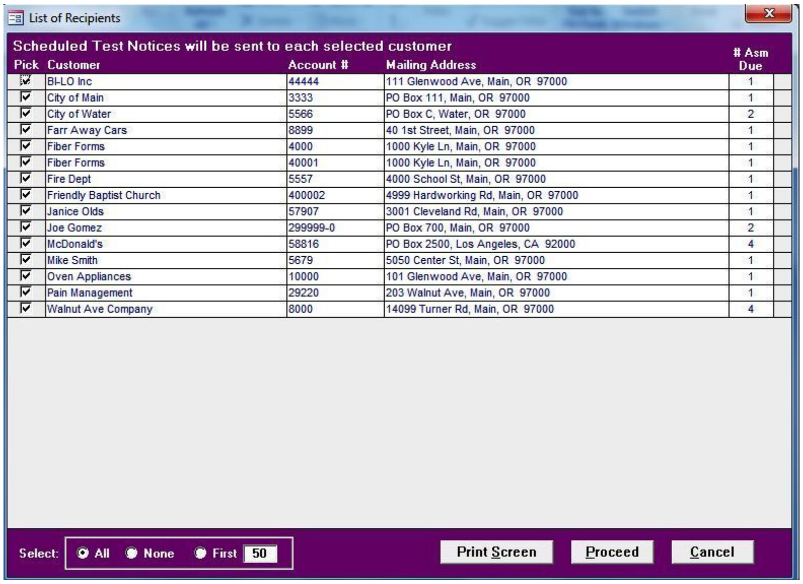


***Figure 19.*** **List of Recipients**

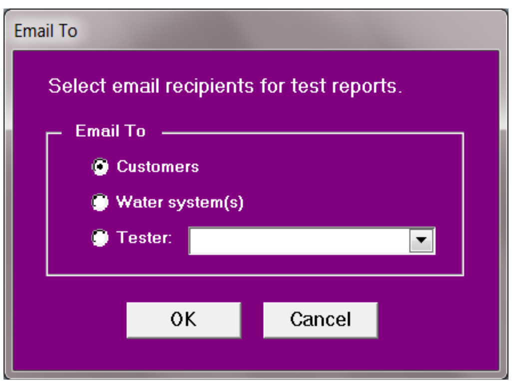


***Figure 20.*** **Select Email Recipients**

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.

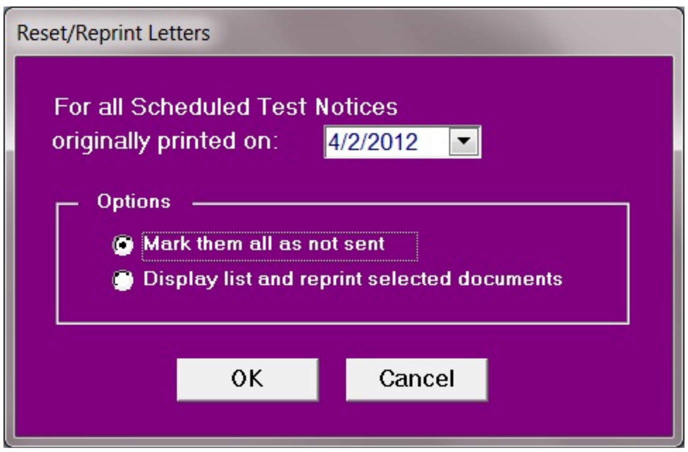


***Figure 21.*** **Reprint/Reset Letters Pop-up Window**

 

## 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.

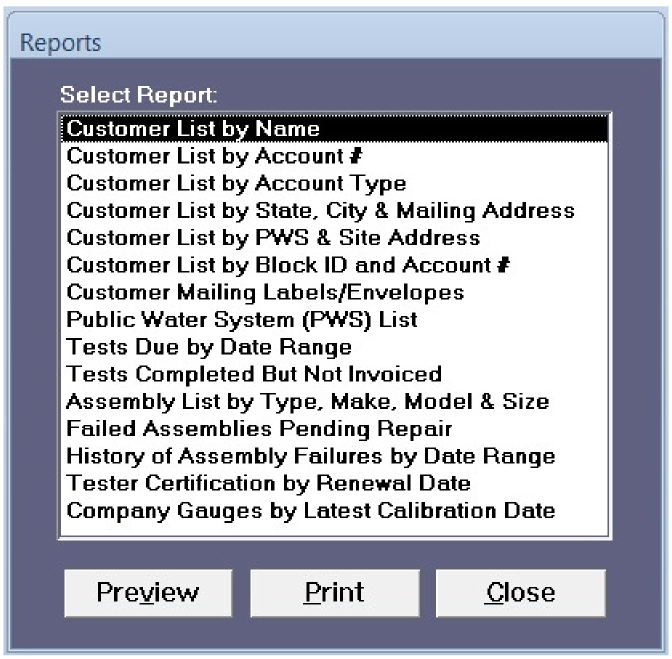


***Figure 22.*** **Report Selection**

## 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 <u>not</u> 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 <u>not</u> "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".

| *Category* | *Merge Field Name* | *Comments* |
|---|---|---|
| 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)

| *Category* | *Merge Field Name* | *Comments* |
|---|---|---|
| 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.

| ***Category*** | ***Merge Field Name*** | ***Comments*** |
|---|---|---|
| Your Company | CompanyName | |
| | CompAddress | |
| | CompCity | |
| | CompState | |
| | CompZip | |
| | CompPhone | |
| | CompFax | |
| | CompEmail | |
| | CompanyContact | |
| | ContactTitle | |
| | ContactCellPhone | |
| | ContractorsLicense | |
| | Invoice_Terms _Days | |
| Invoice | InvNum | Invoice Number |
| | 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**

| *Category* | *Merge Field Name* | *Comments* |
|---|---|---|
| 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)

| *Category* | *Merge Field Name* | *Comments* |
|---|---|---|
| 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)

| *Category* | *Merge Field Name* | *Comments* |
|---|---|---|
| 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.

| *Category* | *Merge Field Name* | *Comments* |
|---|---|---|
| Your Company | CompanyName | |
| | CompAddress | |
| | CompCity | |
| | CompState | |
| | CompZip | |
| | CompPhone | |
| | CompFax | |
| | CompEmail | |
| | CompanyContact | |
| | ContactTitle | |
| | ContactCellPhone | |
| | ContractorsLicense | |
| | Invoice_Terms _Days | |
| Customer Info | CustomerName | |
| | 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**

| ***Category*** | ***Merge Field Name*** | ***Comments*** |
|---|---|---|
| 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.

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