



XC2-UFB

STANDARD

Update from Billing System

STANDARD INTERFACE

Guidelines

Revised: September 24, 2012

Keep Customer Information
Up-to-Date from your
Utility Billing System

For Use with XC2 Software for:

- Backflow Prevention Management
- FOG Program Management
- Meter Testing and Management
- Reclaimed Water Management





XC2 Update From Billing System – “STANDARD”

XC2 - Update File Requirements and Specifications

(Revised: September 24, 2012)

Overview:

The Purpose of the STANDARD XC2 Update from Billing System option:

To keep current the customer contact and mailing address data in XC2 from your utility billing system, so that notices can be sent from XC2 with optimum effectiveness.

- This is just a means of being able to contact the current customer by mail, email or phone.
- There must be a "data link" between the two systems, (XC2 and your billing system).
- This data link is a key field in both systems that make it possible to share data between them.
- The data "link" between the two systems must be **unique** for each **SITE** where a customer has service(s).
- Such a unique piece of data is normally found in your billing system under such names as:
Premise ID, Location ID, Property ID, Site ID, Tap Number, Service ID, Lot Number, etc.

NOTE: In some billing systems, this unique number is the **FIRST** portion of the "Account Number" e.g. Account number is: 12345601, where "123456" is the site identifier and "01" is the incrementer for each new customer. In this case, we can use the account number if we know that the **FIRST** 6 digits are the site identifier.

NOTE: Multiple Meters/Services at a given site. Sometimes, a given site may have multiple identifiers because there are multiple meters and each meter has a unique identifier and no other number is unique for that site. In this case, **ONLY INCLUDE A SINGLE SERVICE**, as all of the services reference the same customer information.

If you need an interface that also updates multiple meter or other multiple information at a site, contact XC2 Software for a customized interface.

Unique Site Identifier – UNCHANGING

Data must exist in the Unique ID field, must be unique within each system and must be shared by both your billing system and your existing backflow data. This number must not change from one customer to the next. The purpose is to match service locations (sites/facilities) from your utility billing with Facility records in XC2, so that the other information can be compared and updated if need be

Any discrepancies to the contrary will require additional programming and processing, for which there will be a charge.

Programming and data massage may be required to populate the unique ID into your current data, based upon address info from your billing system. Accuracy ranges from 50-100% based upon quality of data in your existing systems. There is an additional charge to populate your unique ID in XC2 if needed.

STANDARD INTERFACE – PRICING

This is the “STANDARD” interface specification between XC2 and your utility billing system. This interface option is available at a fixed price. There are no other options, additional features, additional or substitute fields available with this version of this feature. XC2 will conduct a **single** test of your exported file from your utility billing system. If your file does not meet the specification requirements, there will be additional charges to provide consulting and additional testing for new files. Additional Consulting, Testing or Analysis will be charged at current rates

For additional fields, features and options, see the “ADVANCED INTERFACE” XC2-UFB.

REQUIREMENTS and SPECIFICATIONS:

1. File must be "TAB DELIMITED"
Any other type of delimiter or type of file **will not be accepted.**
Fixed Field Length, CSV, XLS, dbf, mdb or any other type of file is **not acceptable**
2. File must be of Type "TEXT", extension: ".txt"
CSV, DAT, XLS,DBF or any other type of file is **not acceptable**
2. ONE Row of data per Premise/Location ID
If there are multiple "services" at a Location, only include one record.
3. All cells must be populated if they are intended to have data in them
XC2 will **NOT** automatically populate "blank" cells.
If a cell is blank, it will be imported as blank and overwrite any existing data.
4. Maximum Field Length
"Maximum Length" is just that, a **maximum**.
If your data from your billing system is not as long as the XC2 maximum,
you **do not need to pad** it with extra spaces to meet the maximum.
5. Field Map
The field map provided in this document must be strictly followed. There are no additions or substitutions permitted with the "STANDARD" Interface. For additional fields, options and features, please see the ADVANCED interface option for XC2 Update from Billing
6. Leading Zeros
XC2 performs an EXACT match with your update file Unique Identifier
If you have leading zeros in your XC2, leading zeros must also exist in your update file
XC2 can strip leading zeros from your update file, if you do not have leading zeros in your XC2 Data File. Please let us know if this is the case
7. Test Files
In order to test the process, you must provide us with:
 - A. The complete update file (not a sample)
 - B. A copy of your current XC2 Data fileFor new XC2 customers, you do not need to provide us with the XC2 Data File
8. Naming Conventions
It does not matter what the file is named.
However, it is helpful if the name suggests the purpose of the file
e.g. "CIS_to_XC2.txt"
9. XC2 Scheduled on Server Option
If you have purchased the license for this optional functionality:
 - The file must always have the same name
 - The file must always be placed in the **same location on the same machine** as that running XC2 Server Software.
 - Determine how often and when you want to run the update
 - The new update file must be generated prior to the XC2 Update process
XC2 will not run the process if the file has been updated. The update scheduler will be turned off if this is the case
 - Get your SMTP Server address from your network administrator
You will need to indicate your SMTP Server address in the XC2 Configuration Area in order to receive email notifications that the update process has started and finished.

Field Map:

- This field map is for the **“STANDARD INTERFACE”**
- This interface is intended to only update the business name, mailing and contact information
- **All items are required**
- *If you do not have a corresponding item, the column should exist in the file, but the column should be “blank”*
- If you need additional fields or other functionality, contact XC2 for specifications for our **“ADVANCED INTERFACE”**
- *The **UNIQUE SITE IDENTIFIER** must be unique to the file, identifies the site (facility), and does not change from one customer to the next.*

	Field Name (from <i>your</i> billing system)	Max Length	XC2 Field Name (corresponding XC2 Field Name)
1	Unique Site Identifier - <u>UNCHANGING</u> (Location ID, Premise ID, etc)	20	Location ID
2	Business/Resident Name	60	Facility Name
3	Service Address Number		Service Address Number
4	Service Address Pre Direction		Service Address Pre Direction
5	Service Address Street Name		Service Address Street Name
6	Service Address Suffix (Av, St, Ln, Rd, Dr, etc)		Service Address Suffix
7	Service Address Post Direction		Service Address Post Direction
8	Customer Billing Name Line 1	60	Mailing Name Line 1
9	Customer Billing Name Line 2	60	Mailing Name Line 2 (e.g. c/o Name)
10	Customer Billing Address Line 1	60	Mailing Address Line 1
11	Customer Billing Address Line 2	60	Mailing Address Line 2
12	Customer Billing Address City	30	Mailing Address City
13	Customer Billing Address State/Province	2	Mailing Address State
14	Customer Billing Address Postal Code	10	Mailing Address Postal Code
15	Customer Contact Name 1	20	Mailing Contact Name 1
16	Customer Contact Name 2	20	Mailing Contact Name 2
17	Customer Billing Address Phone	20	Mailing Address Phone

Step 1:

- Export the data containing **ONLY** the fields listed in the field Map above
- Export all records - **not a sample**.
- File type must be: **TAB delimited**

Populate ALL Cells if they are intended to have data in them.
e.g. If a formula is required to populate the cell, the cell must be populated in the file.
XC2 will not populate cells based on a formula

We **do not** accept Fixed Field Length, csv (Comma delimited), xls, mdb, dbf or any other type of file format

Files **must** be of type: "**TEXT**" (.txt), **NOT**.dat, csv, .xls, dbf, mdb or any other type of file.

"UNIQUE SITE ID"

There must one a single record only in the file for each site

This is identified by the "SITE ID" (e.g. Location ID, Premise ID, etc)

If there is more than one service (e.g. meter) at a customer location, **ONLY ONE** record should be included in the update file. XC2 will not process more than a single record for a given site.

If you have questions about this, please call before creating the file

Step 3:

- Contact XC2 to get our ftp site location for your upload
- Please "Zip" the files needing to be uploaded:
 - Upload your "Update File" (Zipped)
 - Upload your XC2 Data File (existing XC2 Customers Only) (Zipped)

Step 4:

XC2 Software will test your update file to confirm that the format is correct and that it works with your XC2 Data.

Step 5:

Once the file has tested by XC2 Software, we will provide an update to XC2 that will contain the programming for the update process to occur. This update can be downloaded from our website.

Step 6:

If you have XC2 Server, and you have purchased the license for the "scheduled update",

XC2 will need to coordinate with you to configure the scheduled update process:

- You will need to determine the name and location of the update file.
The file must always be named the same and be in the same location on the server machine
- Determine how often and time of day that you want to run the update
- The new update file must be generated prior to the XC2 Update process
XC2 will not run the process if the file has not been updated.
The update scheduler will be turned off if this is the case
- We will need to show you how to configure the update schedule and update file location.
- The file must be located on the same server as the XC2 Server software in order for XC2 Software to access the file successfully and run the update.
- Get your SMTP Server address from you network administrator
You will need to indicate your SMPT Server address in the XC2 Configuration Area in order to receive email notifications that the update process has started and finished.

Step 7:

- Make a backup of your XC2 Data File
- Run the process that creates the update file
- Test the update process with a newly generated update file and a COPY of your XC2 Data File
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