April 9, 2004

Dear XC2 users,

This is the first of what will be an ongoing series of newsletters informing you of updates and added features that we add to XC2 and tips on the most direct way to accomplish routine tasks.

If you have questions for us, please feel free to ask and I may respond in the newsletter if it seems to be of general interest.

If you DO NOT want to continue receiving this newsletter or if there is someone else who should be receiving the newsletter, please inform me of this also. I certainly do not want to add to the SPAM which many of us receive.

Let’s start with 3 items:
• Getting the most recent version of XC2
• The most efficient method of sending 1st Notices
• Sending Follow-up Notices
XC2 now offers a quick way to check for version updates.

Click on “About XC2” in the ‘Help’ menu or the XC2 logo on the Home Page:

or

On System/Version page you can check your current version and build number.

- Click the Check for Updates button.
- Go directly to our website to download the latest update. (Call us for the current Password)
- It’s a good idea to check for updates about once a month.
- Go to our WebEx log on site for a WebEx training or Technical Support.
  (We need to be in communications for you to do this.)
If you don’t have a recent enough version to have this feature, you can go to: [http://www.engsoft.com/xc2update/](http://www.engsoft.com/xc2update/) or call us and we’ll mail you a new CD.

A current Technical Support contract is required for these updates.

We’ve noticed from some of the Tech Support calls that have come in, that many users of XC2 are not using the most efficient method of sending notices or letters.

One of the big improvements that version 3 brought to XC2 is the Letter Wizard. It brought down the number of screens and clicks needed to send a letter to 1 screen and 2 clicks.

**The Most Efficient Method of sending 1st Notices:**

1. From the **Home Page**, go to the **Letters/Notices** pull-down and click on **Send Letter Wizard**.

![ XC2 : BFP : San Demo Water Department](image)

2. Click **Continue**:

The **“Letter Wizard”** let’s you define the parameters of sending a notice in one easy to use screen. The default set allows 2 click printing of next month’s Test Due Notice #1 (first notice).

You can adjust any of the defaults:

- i.e. put in Mondays date if you’re going to print on Wednesday and give yourself a couple of days to fill the envelopes or send to your mail house.
• Exclude BFP Assemblies with a last Test Date after ---- (there is a preference where you can put in the number of days before the letter sent date, such as 60)
• Adjust the Days to Respond or any of the other options of this page.

The “Exclude BFP Assembly w/Last Test Date after:” option needs a little explanation. If an owner or Tester was really ‘on it’ and knew that a test was due in May and went ahead and tested early, say in April, would this satisfy your requirement for this year’s test or would you require him to have it tested in May again?

If the device was tested in April and the test was entered into XC2, the Last Test date would be recorded as April, so clicking this option would exclude this device from your notifications of Assemblies needing to be tested in May.

When you click “Continue” you activate your printer to print the letter and XC2 puts a copy of the letter and the “Response Due Date” in the file of each Assembly. The “Response Due Date” is cleared by entering a Passed test.

Follow up Notices:

After sending your first notice, the routine practice would be to follow up with delinquent respondees from previous letters. This is one of the things that XC2 was built for.

Go to the Special/Lookups pull-down and choose “Over due Notice Responses.”

The Overdue Notice Responses Screen will list all the letters for which there are delinquent respondees, i.e. for which a Test has NOT been entered into XC2.
In the above example, for the letter entitled, "Test Due Notice #1/Facility," in which we gave the owners of Backflow Assemblies 30 days to respond, 11 Assemblies have not had tests entered.

Double click or Select this letter to get a list of the 7 customers who are responsible for these 11 Assemblies.

Highlight these and go back to the letter Wizard:
These people have already received and did not respond to your “Test Due Notice #1/Facility,” so now we will send them the next letter in the series, “Test Due Notice #2/Facility.”

**There are 2 important selections that you must make here:**

1. Change from “List Only Records Matching Criteria” to “List All Associated Records”
   This lets XC2 find the all the untested Assemblies, no matter when the first letter was sent.

2. Check the “Exclude BFP Assembly w/Last Test Date after:” option.
   This handles the possible scenario that a Facility with multiple Assemblies could have had a Passed test entered on some, but not all of their Assemblies. With this option checked, only the Assemblies without a passed test would be listed in the letter.

The normal routine would then be to go back to the Special/Lookups pull-down and choose “Over due Notice Responses,” and follow up on each successive letter in turn until the list is cleared.

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If you have specific issues or procedures that you wish me to discuss, just let me know.

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