



# XC2 Software, LLC

## Features Not Found in Other Software

This is not a complete list of all functions in XC2 Backflow Prevention Management Software. This is a list of items that we are currently aware of that do not exist, or exist in a very limited fashion in other backflow management software products. It is of course possible that since the writing of this list, other systems may have implemented similar features.

### 1. Multiple List Views

- a. Unlimited Saved List Views Configurations
- b. Useful for viewing different types of information about a given set of records

### 2. Saved Searches

- a. Saved Searches allow for creating unlimited often used searches for groups of records
- b. Date Criteria can be “dynamic” e.g. “within 1 month from current date”
- c. Saved Search + List Views
  - i. Allows combining a saved search with a saved list view
  - ii. Performs the saved Search, Displays the selected list view

### 3. Saved “Sets”

- a. Save Specific “Selections” or “Sets” of list views for on-going operations, e.g. data cleanup
- b. Maintain “sets” of records for later retrieval
- c. Intersect multiple sets of records to create new sets
- d. Powerful feature for managing special projects

### 4. Exporting

- a. Export Current List View
- b. Export from Unlimited Scripts
- c. Export from any table in XC2
  - i. E.g.
  - ii. Backflow Assemblies
  - iii. Facilities
  - iv. Backflow Tests

### 5. Scheduled Exports

- i. Saved Search + Export Script
- ii. Automatically Export at scheduled time
- iii. Send Export File via email to unlimited email addresses

### 6. Modification History/Audit Trail

- a. Tracking of all changes made to all records in system.
  - i. User/Date/Time/Change Made
- b. Tracking of changes made to administrator preferences (User/Date/Time)
- c. Tracking of Deletions (User/Date/Time: Records Deleted)
  - i. Undo function for Deletions
- d. Tracking of Mass Updates (User/Date/Time: Records modified, change made)
  - i. Undo Function for Mass Updates

### 7. User Log on Tracking

- a. Tracking history of which users logged on/off system: Date/Time

### 8. Backflow Compliance History

- a. View compliance history for a given backflow record over multiple years

### 9. User Management

- a. Assign specific Access Level to individual users: Administrator/Manager/Entry/Guest
- b. Assign specific task access to a given user: Deletion, Notice Editing, Specific table access, etc.
- c. Quickly View User Log-On History

## 10. Notices

- a. Over 100 “merge” fields that can be inserted into notices
- b. Email Notices (optional feature)
- c. Printing/Collating and print or email test report forms with notices.

## 11. Automatic Test Due Notices

- a. Send up to 6 sequences of Annual Test Due Notices
- b. Click of a button automatically calculates which notices to send
- c. Send via Email for Designated Customers
- d. XC2 automatically calculates which to print and which to email

## 12. Test Entry Features

- a. Validation of Testers, Certifications, Test Kit Calibrations, Insurance, Registrations, Licenses
- b. Automatic determination of passed or failed tests based upon administrator preferences.
- c. Attach pdf, or scan of test report

## 13. Surveys

- a. Simple, Checklist or “Detailed”
- b. Multiple configurations depending upon needs.
- c. View/Report/Export list of specific Survey Violation Items
- d. View/Report/Export list of specific Survey Inspections

## 14. Testers/Test Companies

- a. Quickly view all test history for a single tester or testing company

## 15. Web Based Test Entry (Optional Module)

- a. Entry via Desktops, Tablets or Smartphone
- b. Secure Lookups of Tests to do by Testers (e.g. “Tester Access Code” for each Customer)

## 16. Quickly lookup and view Lists (For Reports or Export):

Facilities (Sites/Customers)	Testers
Backflow Records	Test Kits
Test History	Test Companies
Survey History	Installation History
Notice History	Repair History
Owner Address	Survey Violations
Mailing Address	Survey Inspections
Multiple Water Districts	

## 17. DataSync Option

- a. Ability to take laptop/tabletPC into field – not connected to network
- b. Lookup/Enter any data
- c. Synchronize with master system

## 18. “Boilerplates” (Common Text)

- a. Ability to Enter Phrases, Paragraphs, or entire pages of text for “one-click” entry into comments fields, e.g. for Surveys, Inspections, Repairs, Tests, etc.

## 19. Inter-Client Messaging

- a. Ability for a given user to send messages to a single or multiple other users on the system

## 20. Duplicate Record function

- a. Ability to “duplicate” a given record, change specific information

## 21. Duplicate Lookup Function

- a. Special Function finds duplicate facilities based upon name, address, location ID, account #

## 22. Activity Types

- a. Ability to designate multiple “Activity” or “Event” types during entry for Tests, Surveys, Etc.
- b. E.g. a “Passed Test” may be: Annual Test, Test After Repair, Test During Installation
- c. Useful for reporting purposes to delineate types and number of specific events.
- d.

## 23. Update from Billing – Automatically Scheduled

- a. Link to Billing system is found in other systems, however:
- b. XC2 allows automatically scheduling updates from the billing system to run at specific times without user intervention.

## 24. Preferences and Setup

- a. This feature list could be very large. They won’t all be listed here
- b. There are a very large number of areas that can be “Administrator” modified to affect specific behaviors in XC2.
- c. These are items that may work fine in their “default” configuration, but may be need to be altered in some way in the future.
- d. Popup and Lookup Lists: Over 75 different lists can be modified
- e. User Defined Fields:
  - i. Assign Lookup List Option
  - ii. Allow be Visible or Invisible
  - iii. Search for, Report, Export, Merge into Letter
- f. Multiple Comments areas (4) for:
  - i. Facilities
  - ii. Backflow Assembly Records
  - iii. Search for, Report, Export, Merge into Letter
  - iv. Comments areas also for Testers, Companies, Test kits, Test Entry, Repair, etc.
- g. Examples: Test Criteria Values (pass/fail), Required Data Entry, Set Data Entry Areas Visible/Invisible, Change Fieldnames and Labels, Change Table Names, Tester Entry Preferences

## 25. User Level Preferences

- a. These are preferences that can be set by individual users
- b. These preferences do not affect other users
- c. Different “Screens” e.g. power users vs. entry users
- d. Different Colors for screens, list views, entry fields
- e. Choice of Font, Size, Style for list views, entry views
- f. Comments areas can be “zoomed” with larger/smaller text size

## 26. Quick Lookup Functions

- a. There are numerous one-click functions to quickly locate groups of records and perform special functions.

Automatic Reminders  
Overdue Tests  
Overdue Notices  
Tests Due (Date Range)  
Tester Certifications Due  
Test Kit Calibrations Due

Surveys Due  
Survey Reinspections Due  
Facilities Not Inspected  
Approved/Unapproved installed Assemblies

## 27. User Definable Report Editor

Report editor allows creating unlimited report formats which can be saved, shared with other users and modified to create new report formats. Send reports to printer, text file, graph, html file.

Assign colors, text styles, columns, summary information, titles, footers.

**There are many, many more features in XC2 Software. The above is just a sample of some of the main features which make XC2 Software different from others. As well, we are constantly enhancing XC2 to make it more user friendly and yet more robust and can be integrated with other systems.**

**If you have specific questions, please call!**