



XC2 Update From Billing System

XC2 - Update File Requirements and Specifications

The **Primary Purpose** of the 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 a service.
- Such a unique piece of data is normally found in your billing system under such names as:
 - Location ID Property ID
 - Site ID Tap Number
 - Service ID Lot Number
 - Service Number
 - Or any other Unique-Unchanging ID number which identifies the site of service regardless of the customer.

NOTE: Sometimes 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 incremter 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: 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 we just need a single service, as all of the services reference the same customer information.

Unique Site Identifier

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.

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

1. File must be “TAB Delimited” OR “Fixed Field Length” Only

Any other type of delimiter or type of file will not be accepted.
CSV, XLS, mdb or any other type of file is not acceptable

2. File must be of Type “TEXT”, extension: “.txt”

CSV, DAT, XLS or any other type of file is not acceptable

3. Maximum Field Length

"Maximum Length" is just that, a **maximum**.

If your data is TAB delimited and the field 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.

If the file is Fixed Field Length, you will need to pad it with extra spaces to meet length of the field in your system, however, it cannot be longer than the maximum allowed by XC2.

4. Field Map

We need to know the order and which fields are being used.

For fixed field length format, we need to know the length of each field.

Please provide us with a map (*example on next page*) showing the fields being used, order of fields, (length of each if fixed field length.)

5. 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

6. 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 file

For new XC2 customers, you do not need to provide us with the XC2 Data File

7. 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"

8. 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 Example

- Create a “map” of what fields you will want updated, and which XC2 fields they correspond to.
- List **ONLY** those fields that you want updated.
- If you do not have a matching column as that in XC2, **DO NOT include** it.
Only include those field columns that are exported from your system
- *List the fields in the order that they specified in the update file*
- *If the file is “fixed field length”, indicate the length of the field*
- **Do not include** any fields that are NOT on the XC2 pick list unless you have made prior arrangements with XC2
- *Additional fields and functionality are available by special request - additional charge may apply)*

Example Field Map

Field Name (from <i>your</i> billing system)	Field Length (if fixed length)	XC2 Field Name (corresponding XC2 Field Name)
Unique Site Identifier (Location ID, Premise ID, etc)	20	Location ID
Business Name	40	Facility Name
Service Address Number	10	Service Address Number
Service Street Name	30	Service Address Street Name
Customer Mailing Name Line 1	40	Customer Mailing Name Line 1
Customer Mailing Name Line 2	40	Customer Mailing Name Line 2 (e.g. c/o Name)
Customer Mailing Address Line 1	40	Customer Mailing Address Line 1
Customer Mailing Address Line 2	40	Customer Mailing Address Line 2
Customer Mailing Address City	30	Customer Mailing Address City
Customer Mailing Address State	2	Customer Mailing Address State
Customer Mailing Address Zip Code	10	Customer Mailing Address Zip Code
Customer Mailing Address Phone	16	Customer Mailing Address Phone

Step 1:

- Create a Field Map of the update file that intend to use and send it to XC2 Software for approval.
- If you need additional fields or functionality, contact XC2 Software before sending the field map or creating the update file
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Step 2:

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

We **do not** accept CSV (Comma delimited), XLS or any other type of file format
Files **must** be of type: "TEXT" (.txt), not .dat, csv, .xls or any other type of 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

XC2® Update from Billing System Data Format Specification & Requirements

Effective: June 2009

1. TEXT File: **Tab Delimited** or **Fixed Length Only** (NOT: CSV, XLS, etc)
2. File Type Extension: *.txt (not: .dat, .xls, or other)
3. The first field MUST be a UNIQUE unchanging SITE IDENTIFIER
4. This is a "pick list", that is, only the fields that you have that correspond to meaningful information in your billing system should be included.
5. **Do not include** fields that are not in this list unless you have made prior arrangements with XC2
6. **Do not include** "blank columns". If you do not have a corresponding field in your billing system, do not include the column for it.

The following chart shows the most common information that is available in a typical utility billing system that is appropriate for use in the XC2 System.

<u>COLUMN FROM BILLING SYSTEM-</u> (Field names from your billing system)	<u>Field Length</u> (if fixed length)	<u>Corresponding XC2 FIELD</u>	<u>Max. Field Length</u>
Unique Site Identifier (Location ID, Premise ID, etc)		Location ID	20
		Facility Name	60
		Account Number	20
		Service Address Number	10
		Service Address Pre-Direction	10
		Service Address Street Name	40
		Service Address Street Suffix	10
		Service Address Post Direction	10
		Service Address Line 2	40
		Service Address Unit	20
		Service Address City	30
		Service Address State	2
		Service Address Zip	10
		Service Address Contact First Name	20
		Service Address Contact Last Name	20
		Service Address Phone	20
		Service Address Phone 2 (FAX)	20
		Service Address Email	80
		Customer Mailing Name	60
		Customer Mailing Name Line 2 (e.g. c/o Name)	40
		Customer Mailing Address Line 1	40
		Customer Mailing Address Line 2	40
		Customer Mailing City	30
		Customer Mailing State	2
		Customer Mailing Zip Code	10
		Customer Mailing Contact First Name	20
		Customer Mailing Contact Last Name	20
		Customer Mailing Phone	20
		Customer Mailing Phone 2 (FAX)	20
		Customer Mailing Email	80

Other fields and/or additional functionality may be available or added as a customization. Additional charges may apply.

PLEASE call if you have any questions or need clarification.