



Backflow Prevention Management

**BPMS Administrator Version 6
Summary of Major New Features**

Created By: BPMS Software

Last Updated: March 6, 2012

Table of Contents

What's in this Document?	3
Update Facility/Customer Info from Utility Billing/CIS (v6.11a 25-Feb-2011)	3
BPMS Import Key Features	3
For More Information about BPMS Import/Export	6
Optimized for SQL Server Databases (v6.10c September 2011)	6
Easy to Move Facilities between Customers (v6.10b September 2011)	7
Send Letters via Email or Regular Mail (v6.09y August 2011)	7
Send Letters to Tester Companies (v6.09y August 2011)	8
Active Test Kits for Tester Company on Tests form (v6.08y Jan 2012)	8

What's in this Document?

The purpose of this document is to list the new features that were added since BPMS 6 Administrator edition was first released in 2010.

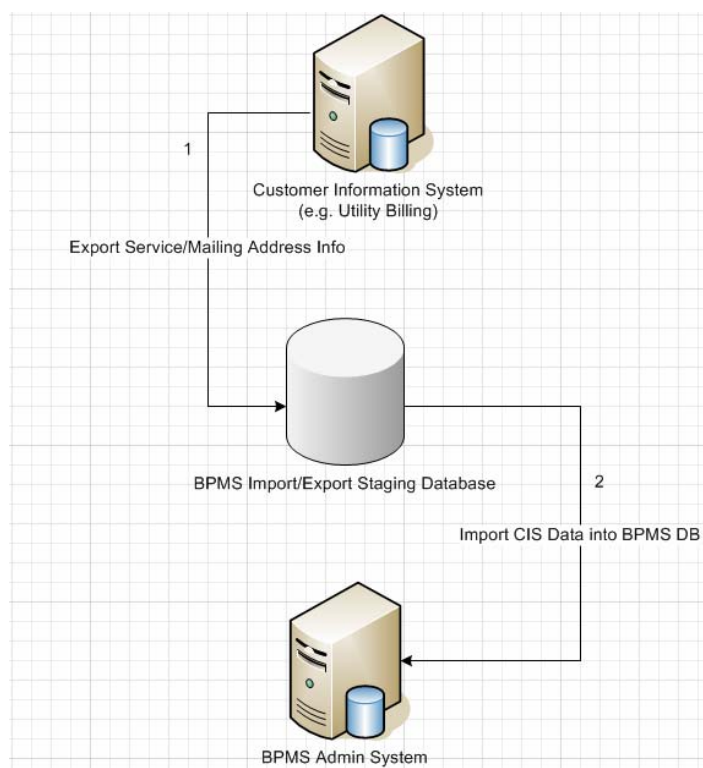
Update Facility/Customer Info from Utility Billing/CIS (v6.11a 25-Feb-2011)

Tired of getting mail returned after you send a batch of letters? The "BPMS Import/Export" application can help you keep your BPMS facility and customer information up-to-date with information in your customer information system (CIS) such as a Utility Billing system.

The update is a two step process as shown in Figure 1.

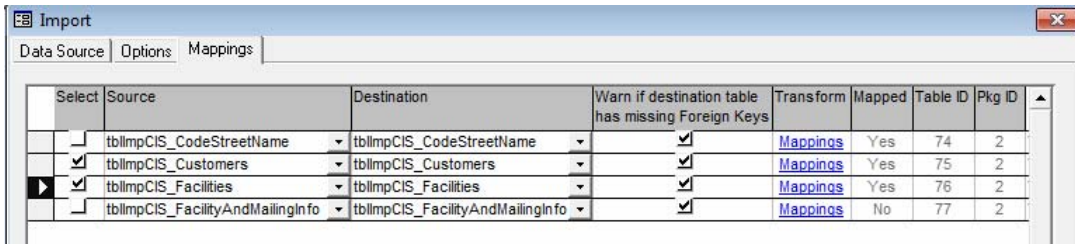
1. The first step is to setup a process on your CIS system to periodically export data to a staging database.
2. Using the BPMS Import/Export you execute the import.

Figure 1 - BPMS Import Diagram (CIS/Utility Billing)

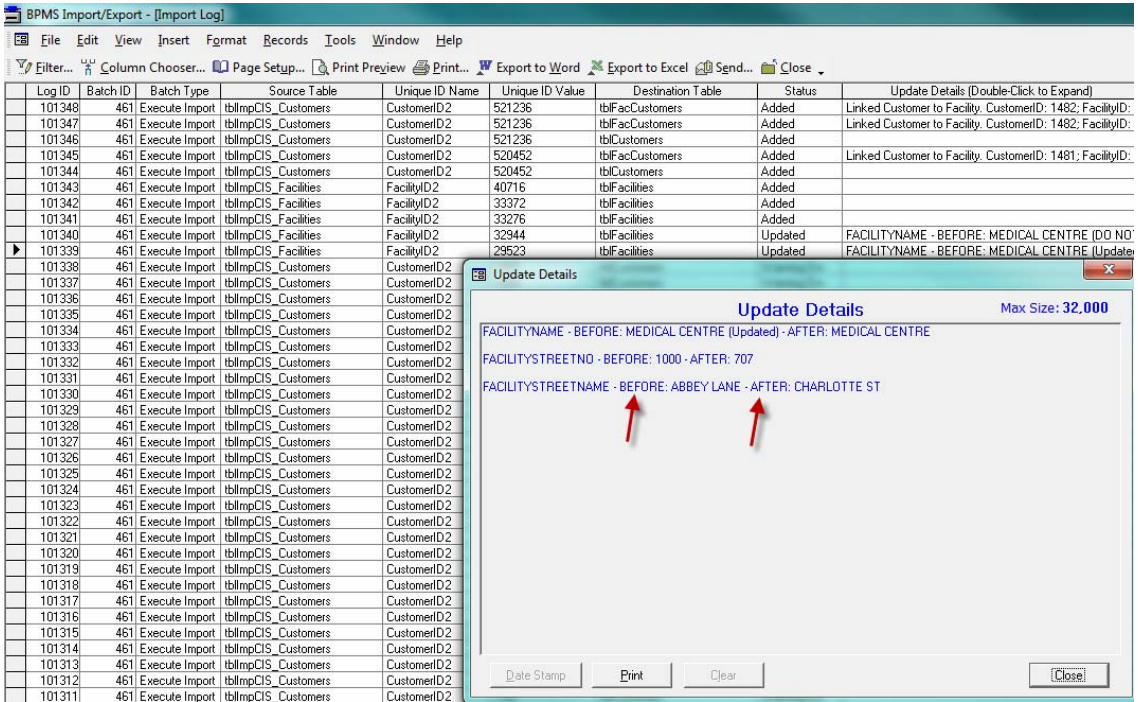


BPMS Import Key Features

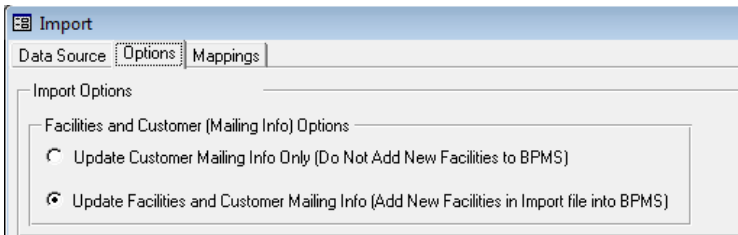
1. Choose which table/field to import



- A detailed log keeps track of all the information that was updated down to individual fields.



- Choice to only update existing facilities or to also create new facilities



- Exclude facilities from update by setting the "No Mailing Update" flag on the Facilities form. For instance, in a strip mall, often each tenant is responsible for their own devices.

Facilities

New Delete Undo Save Search All Datasheet Print Docs Cust. Facilities Devices Tests Surveys Testers Appd Tables Close

Facility Name RYE PARK INDUSTRIAL MALL Copy to New Facility Active Facility Id 545

Street No 774 Street Name RYE ST Account No 148146 Test Month 1-Jan

Unit No 0015 Cross Street Property Id No 32606 Survey Cycle 1 Year

Address 2 Hazard Level High Next Survey

City/State/Zip PETERBOROUGH ON K3J 6W9 Facility Type INDUSTRY

Comments Water Purveyor Peterborough Utilities Commission

Add Cust. Delete Cust. View Cust. Customers for this facility

Customer Name	Cust. ID	Cust. Type	Primary Contact	Active	Mailing Address
RYE PARK INDUSTRIAL MALL	1402	Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PO BOX 1387, PETERBOROUGH, ON

Record: 1 of 1

Installed Devices Surveys/Inspections Grease Control Images Additional Info. Custom Fields

Page And Grid No of Units 1 Residential Created By BPMSImport

Date of CSI Rate Code Granted Exception Date Created 14-Aug-2007

CSI Performed by Rate Code 2 No Mailing Update Customer ID 1402 Time Created 5:39:46 PM

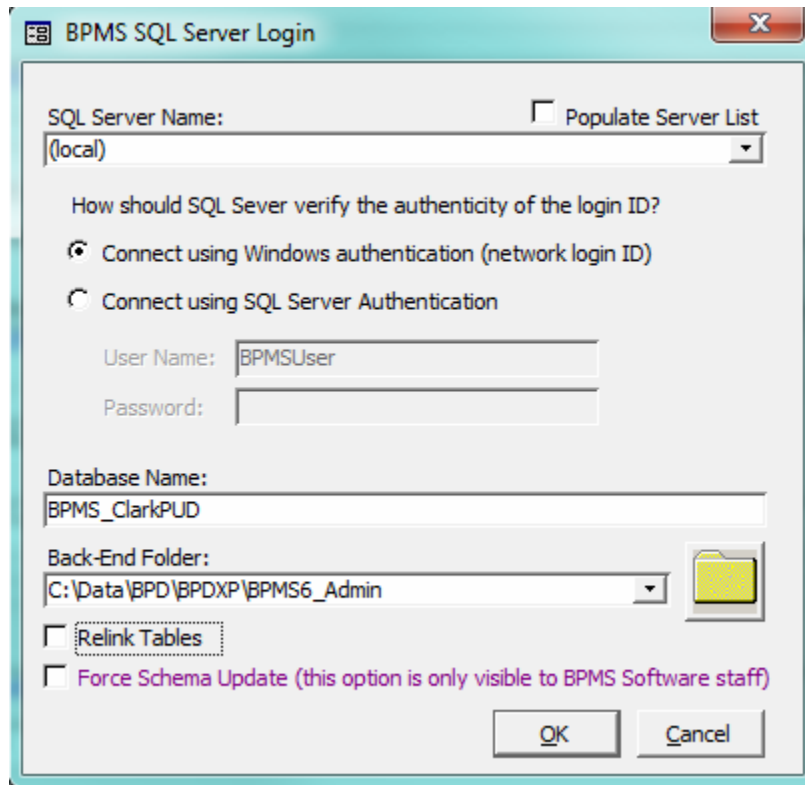
BPMS Import will not update Customer Info for this facility

For More Information about BPMS Import/Export

To find out if the BPMS Import/Export application can help you, don't hesitate to [contact us](#).

Optimized for SQL Server Databases (v6.10c September 2011)

BPMS was optimized to improve performance with SQL Server for users using BPMS with the optional SQL Server database. The standard installation is to use BPMS with a Microsoft Access database.



The screenshot shows a dialog box titled "BPMS SQL Server Login". It contains the following fields and options:

- SQL Server Name:** A dropdown menu with "(local)" selected. To its right is a checkbox labeled "Populate Server List".
- How should SQL Server verify the authenticity of the login ID?**
 - Connect using Windows authentication (network login ID)
 - Connect using SQL Server Authentication
- User Name:** A text box containing "BPMSUser".
- Password:** An empty password text box.
- Database Name:** A text box containing "BPMS_ClarkPUD".
- Back-End Folder:** A dropdown menu with "C:\Data\BPD\BPDXP\BPMS6_Admin" selected, accompanied by a folder icon.
- Relink Tables
- Force Schema Update (this option is only visible to BPMS Software staff)

At the bottom right, there are "OK" and "Cancel" buttons.

Easy to Move Facilities between Customers (v6.10b September 2011)

On the Customers form (Facilities/Devices tab) the **Move Facilities** button makes it easy to move facilities between existing customers as shown below.

Figure 2 - Three Steps to Move Facilities between Existing Customers

Customer 1

Customer Name: **MCDONALDS** Mailing Address: **NORTH STAR RESTAURANTS, PO BOX 871805, VANCOUVER, WA** Customer ID: **1188**

Selected	Facility ID	Facility Name	Facility Address	Prim. Contact	Customer ID	New Cust. ID	ID
<input checked="" type="checkbox"/>	1242	MCDONALDS	710 NE 98 CIR, VANCOUVER	<input checked="" type="checkbox"/>	1188	1188	702
<input checked="" type="checkbox"/>	1928	MCDONALDS	13002 NE HWY 99, VANCOUVER	<input checked="" type="checkbox"/>	1188	1188	703
<input checked="" type="checkbox"/>	1945	MCDONALDS	7010 NE HWY 99, VANCOUVER	<input checked="" type="checkbox"/>	1188	1188	7862

Record: 1 of 3

[Select All] Clear All Move Selected Facilities to Customer 2 Delete Customer 1

Customer 2

Customer Name: **1202 PROPERTIES LLC** Mailing Address: **1115 ESTHER ST #A, VANCOUVER, WA** Customer ID: **5358**

Selected	Facility ID	Facility Name	Facility Address	Prim. Contact	Customer ID	New Cust. ID	ID
<input type="checkbox"/>	4559		10002 NE 13 AV, VANCOUVER	<input checked="" type="checkbox"/>	5358	5358	4636

Record: 1 of 1

Select All Clear All Move Selected Facilities to Customer 1 Delete Customer 2

Save Undo All Moves Close

Send Letters via Email or Regular Mail (v6.09y August 2011)

This update allows users to send letters via email to customers, testers and testing companies.

Figure 3 - Reminder with Separate Letters for Regular Mail and Email Recipients

The following items may require your attention

Show first letters due within **90** Remind of other events due within **0**

No of Items	Type	Description	Details	Prepare Next Letter
1896	Test Due Letter	Test Due Letter 1 (Regular Mail)	Details...	Prepare...
1557	Test Due Letter	Test Due Letter 2 (Regular Mail)	Details...	Prepare...
3	Test Due Letter	Test Due Letter 3 (Regular Mail)	Details...	Prepare...
259	Test Due Letter	Final Letter Expired (Test Due Letter 3 (Regular Mail))	Details...	Prepare...
337	Test Due Letter	Test Due Letter 1 (Email)	Details...	Prepare...
279	Test Due Letter	Test Due Letter 2 (Email)	Details...	Prepare...

Instructions to use this new feature can be found in section "How to Send Letters by Email" of the BPMS Manual. You will need to version 6.09y (31-Aug-2011) or newer to get the update. To access online help, from the menu bar, click HELP then choose "BPMS Manual".

Send Letters to Tester Companies (v6.09y August 2011)

You now have the option of sending letters to the Tester, the Company or both. On the Test Kit, the letter will show the "Primary User" as shown in Figure 4.

Figure 4 - Test Kit Calibration Due Letter

RE: Backflow Prevention Certification

Dear Sir or Madam:

Every year, the City of Garland requires proof that all backflow assembly testing equipment is calibrated. Please submit a copy of the latest calibration certificate to the City within 30 days.

According to our records, the following testing kits or gauges are registered to your company:

SERIAL NO	MAKE	MODEL	CALIB. EXP.	PRIMARY USER
0012806	Watts	TK9A	02-Feb-2010	Richard k Delaney
02101914	Watts	TK9A	08-Mar-2011	Richard k Delaney
02101915	Watts	TK9A	08-Mar-2011	Richard k Delaney
05090522	Conbraco	40-200-TK5U	18-Jan-2011	Richard Gouldby
05090527	Conbraco	40-200-TK5U	29-Jan-2011	Steve Jabbour
349559	Conbraco	40-200-TK	06-May-2010	Steve Jabbour

In addition to the Tester Certification and Test Kit Calibration, two new letter types can be created: "Business License Expired" and "Insurance Expired".

Figure 5 - Four Different Types of Company Letters

Letter Type	Grp#	Item#	Letter Name	Resp	Parent Letter (Optional)	Document Name	Active	Ltr ID
Company - Tester Certific	29	1	Company - Tester Certification Ltr 1	30		CompanyTestert	<input checked="" type="checkbox"/>	173
Company - Test Kit Calibri	28	1	Company - Test Kit Calibration Ltr 1	30		CompanyTestKit	<input checked="" type="checkbox"/>	172
Company - Insurance Lett	26	1	Company - Insurance Ltr 1	30		CompanyInsurar	<input checked="" type="checkbox"/>	170
Company - Business Lice	25	1	Company - Business Licence Ltr 1	30		CompanyBusLic	<input checked="" type="checkbox"/>	169

Active Test Kits for Tester Company on Tests form (v6.08y Jan 2012)

On the "Tests" form, upon entering the "Tester's Name" or "Certification No", if the Tester works for a company, and the company has multiple test kits, the list of active Test Kits/Gauges will popup as shown below.

Serial No	Make	Model	Calibration Expires	Calibrated By	Company Name	Certification No
0034579	Watts	TK-99E	04-Aug-2011	United Instrumentation	DanMac Plumbing & Drain Ser	07049
07100189	Zurn/Wilkins	TG-5	04-Aug-2011	Zurn/Wilkins	DanMac Plumbing & Drain Ser	09450

This option can be disabled from the "Customize" button on the Switchboard then click on the "Tests" tab. Uncheck option this option: Populate Test Kit S/N from Tester Info