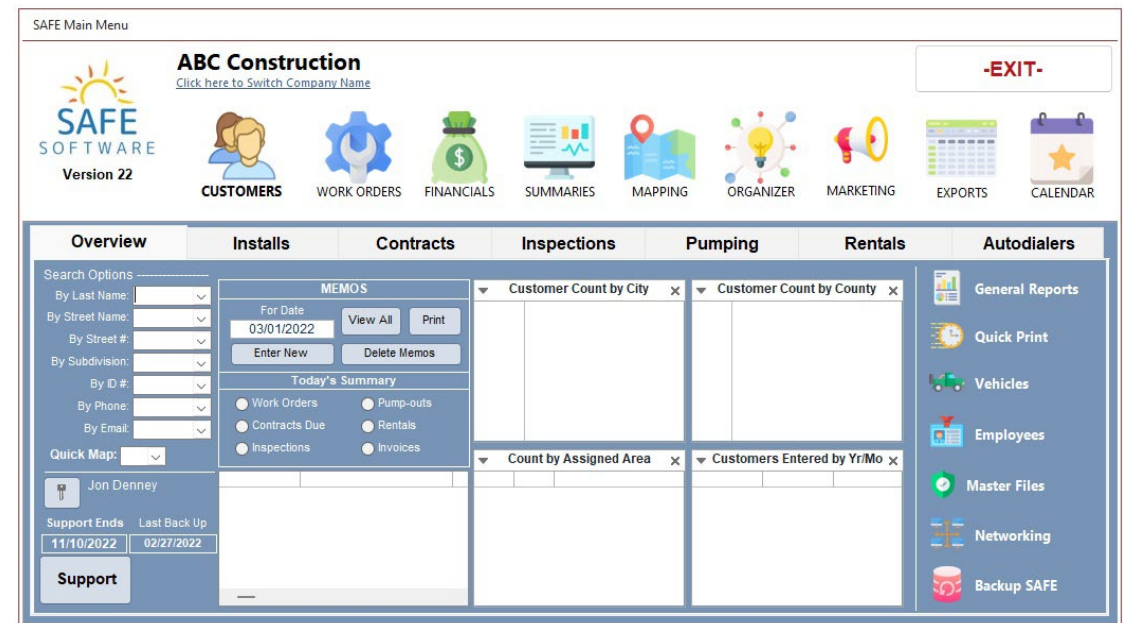


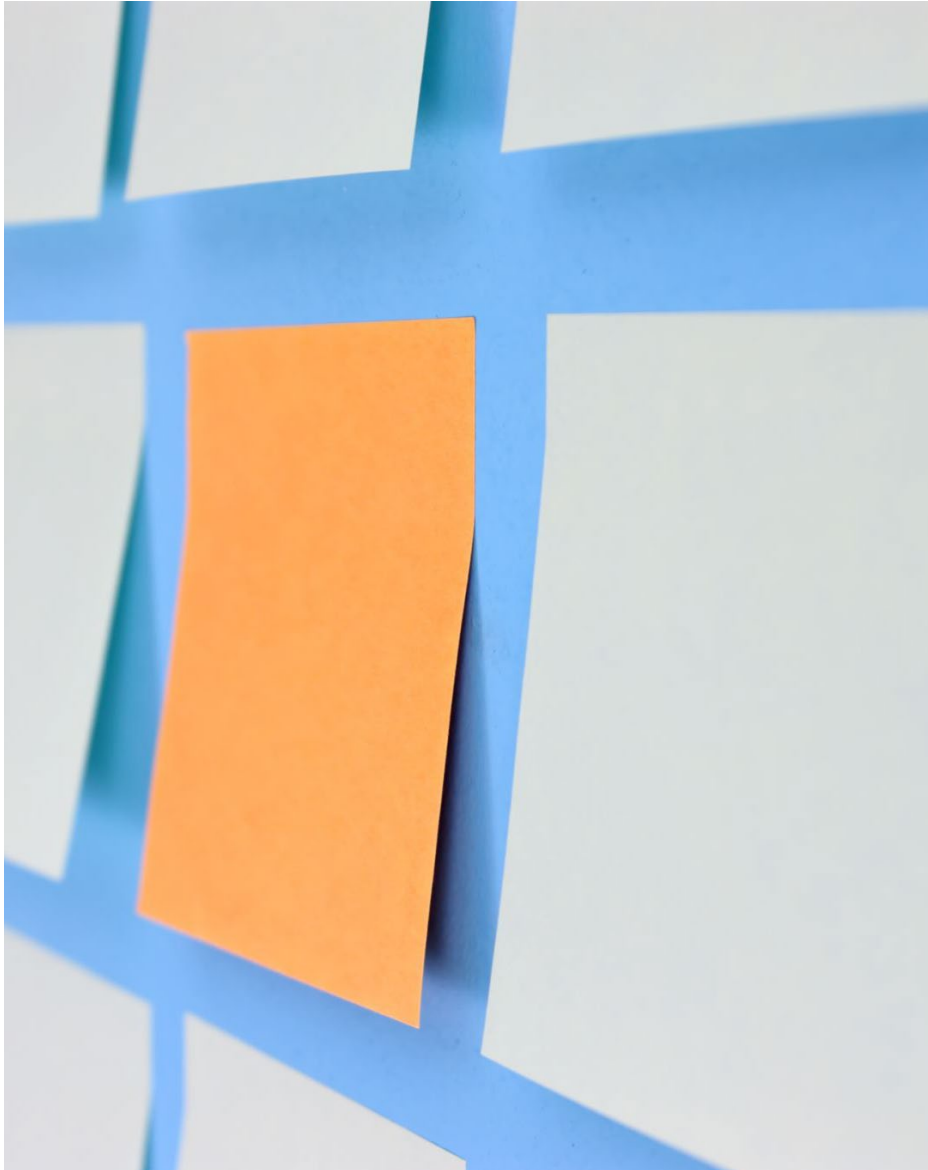
WHAT'S NEW FOR VERSION 22

- www.mysafesoftware.com



Private Company Version





Topics

- Introduction
- Features for Septic Companies
- Database Field Additions
- Design Changes
- Fixes
- Integrations
- 2022 Pricing

Introduction

jondenney@mysafesoftware.com

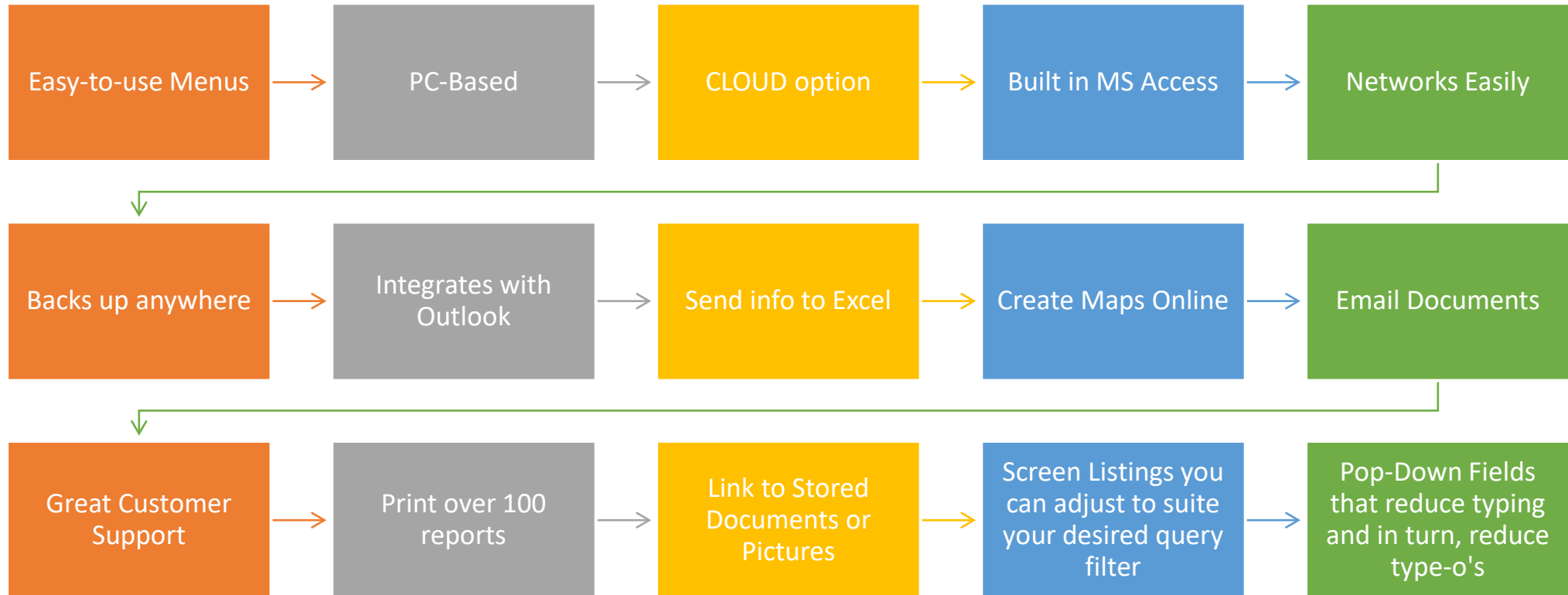
(940) 367-2246

SAFE Software was developed in 2000 with the purpose of allowing the user to easily enter system data, manage customers, schedule important dates, print and email documents, and keep information safe and sound in YOUR possession. It is a "PC-Based" program designed in Microsoft Access which is the most widely used database application in the world. It is not currently a "Web-based" application, however, we partnering with multiple platforms that will surely meet your needs. We currently offer a "cloud-based" (Virtual Desktop Integration) solution and would love to demonstrate it to you if desired.

Please read on to see the standard features and exciting new enhancements to the SAFE Program. If you are ready to purchase the program or update to the latest version, please contact us.



Standard Features



Standard Features (Continued)

Store all your customer's home or commercial information

Create and Print Customized Contracts and Inspection Sheets

Schedule recurring Inspection Visits and Contract Renewals

Create Work Orders for your service calls

All specifications of the Install can be documented

Email Inspection results to your customers and Health Departments

Use Tablets in the Field with or without an Internet Connection

Create Invoices and email or print them for your customers

View listings and screen reports of all your service & customer info

Record and Schedule any Pump-outs and Disposals

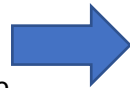
Track Employees and Vehicle Maintenance and Mileage

Run company reports and counts that will help you manage progress

Additions to Version 22 – (MAIN MENU)

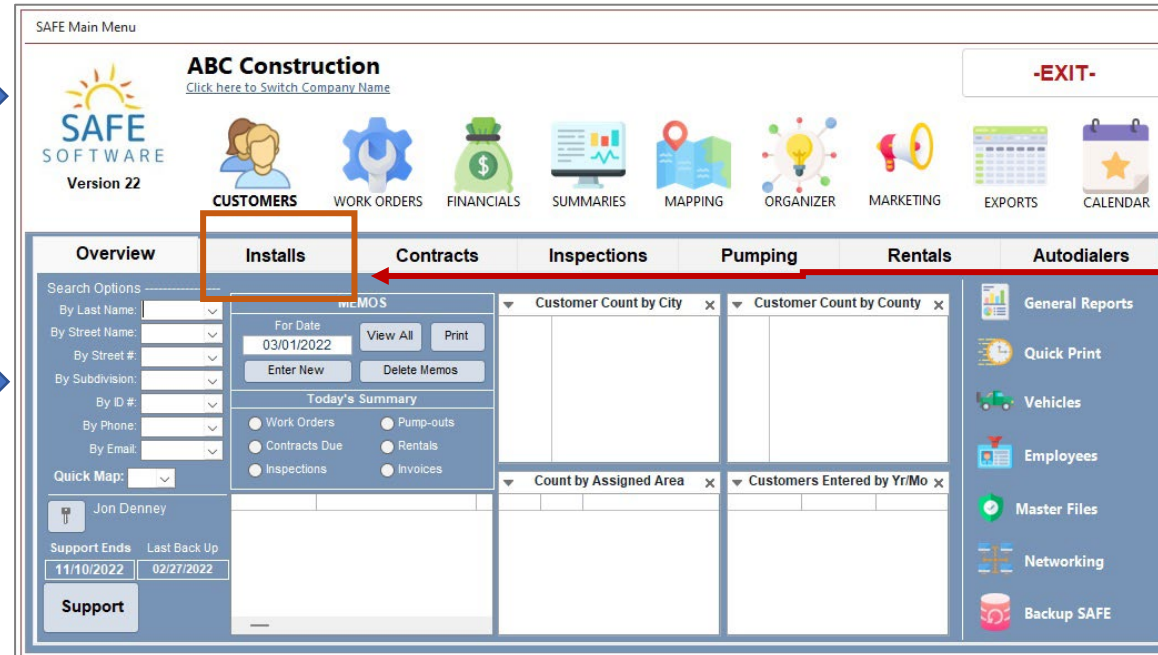
New Logo and Icons:

I know! A new graphics for a new version... we just like to keep looking forward!



Subdivision Search:

Added a search by Subdivision.



Install Tab: We've added a tab for Install Listings and Reports. You can also see Active Warranties for these Installations.

Additions to Version 22 – (EMAIL MESSAGES)

Email Message Options:

Create 4 Standard email messages for different areas of your business

Custom Email Setup

Customize Your Default Email Messages

[Go To Email Templates](#) [Save/Exit](#)

Contract Email Inspection / Work Order Email Financials Email Pumping Email

Body of the email for Contracts

This is just a short note to say thank you for having a contract with us. We wouldn't be able to continue improving providing unmatched service if not for valued customer like you!

We are looking forward to a year of growth and providing you the most professional service possible. Please contact us with any question, ideas, or constructive criticism.

Email Enhancements:

Now you can send an email containing the Results Form as a PDF to the customer with a CUSTOM MESSAGE BODY created by you. This will be specific to the type of message you are sending (Contract, Inspection, etc.)

Install Tab: You can also create “Custom Emails” by going to the “Email Templates” menu. These custom email templates are used for your Contract Reminders and other documents that are unique. The custom message .

ABC Construction has completed your Scheduled Inspection - Message (Pla...

File Message Insert Options Format Text Review Help Tell me

Send To: Jondenney@email.com

Cc:

Subject: ABC Construction has completed your Scheduled Inspection

Completed Inspection Form.pdf 23 KB

Hello Jon Denney,

Here is the completed Scheduled Inspection for 123 Smith Street, Denton, TX 76210, Denton

This is just a short note to say thank you for your support. We wouldn't be able to continue improving providing unmatched service if not for valued customer like you!

We are looking forward to a year of growth and providing you the most professional service possible. Please contact us with any question, ideas, or constructive criticism.

Thank you,

Bill Smith
ABC Construction
P.O. Box 8549
Greenville, TX 75404
(940) 367-2246

Additions to Version 22 – (INSPECTIONS)

Enhanced Email Options:

Added Emailing functions to allow the user to send the Customer a “Profile with Inspection History” or “Completed Forms”. You can also send the Agency the “Completed Form” for a particular customer.

Inspections by Area or City Options:

Added an “Inspections by Area or City”. Also added the ability to print or email the list and the blank forms from the “All Inspection Reports” menu

Inspection Audits:

Enhance the Completed Inspection Report to help you keep up to date on the number of Inspections performed on customers with Contract Ending Dates between dates you select.

Additions to Version 22 – (INSPECTIONS)

The screenshot shows the 'Maintenance Inspections' software interface. At the top, it displays the address '123 Smith Street, Denton, TX 76210' and contract dates. Below this are tabs for 'Inspection Results', 'Other Results', 'Signatures', and 'Email'. The 'Inspection Results' tab is active, showing fields for 'Completed' date, 'Visit Type', 'Scheduled' date, 'Test Method', 'Maint. Provider', 'Technician', 'Time In', 'Insp #', 'Time Out', and 'of'. The 'Other Results' tab shows fields for 'Aerators', 'Filters', 'Disinfection Device', 'Chlorine Supply', 'Added Chlorine', 'Chlorine Amount', 'Liquid Chlorinator', 'Other Chlorinator', 'Irrigation Pumps', 'Recirculating Pumps', 'Sprayfield Veg', 'Changed Diffusers', 'Diffuser Condition', 'Electric Circuits', 'Distribution Sys', 'Autodialer', 'Alarm', 'PH Level', 'Nitrogen', 'PSI', 'CFM', 'Fecal Coliform', 'Water Meter', 'Sludge Levels', 'Tank 1', 'Tank 2', 'Tank 3', 'Tank 4', 'Tank Lid', 'Insp. Port/Plug', 'Floats', 'Timer', and 'OK System Light'. A blue callout box labeled 'New Inspection Fields:' points to the 'Tank 4', 'Floats', and 'Timer' fields. The 'Email' tab shows a 'View Inspection History' button and a 'Preview / Print' button. A 'SAVE / EXIT' button is in the top right corner.

New Inspection Fields:

- Tank 4 (Sludge Level Reading for the 4th tank)
- Floats
- Timer

Email Enhancements:

Now you can send an email containing the Results Form as a PDF to the customer with a CUSTOM MESSAGE BODY created by you. This will be specific to the "Inspection / Service" Type of the message option.

The screenshot shows an email client window titled 'ABC Construction has completed your Scheduled Inspection - Message (Pla...'. The email is addressed to 'Jon Denney' with the email address 'Jondenney@email.com'. The subject is 'ABC Construction has completed your Scheduled Inspection'. The email body contains a message from 'Bill Smith' at 'ABC Construction' (P.O. Box 8549, Greenville, TX 75404, (940) 367-2246). The message text is: 'Hello Jon Denney, Here is the completed Scheduled Inspection for 123 Smith Street, Denton, TX 76210, Denton This is just a short note to say thank you for your support. We wouldn't be able to continue improving providing unmatched service if not for valued customer like you! We are looking forward to a year of growth and providing you the most professional service possible. Please contact us with any question, ideas, or constructive criticism. Thank you,'. A 'Completed Inspection Form.pdf' (23 KB) is attached to the email.

Additions to Version 22 – (CONTRACTS)

All Auto-Renew / e-Sign Customer Listing:

Run a report to see ALL customers that have given you permission to “auto-renew” their Contract with an e-signature.

The screenshot displays the 'Reports Menu' interface. At the top, there are tabs for 'Contracts', 'All Customers', 'Inspections Menu', and an 'Exit' button. The 'Contracts' tab is active. Below the tabs, there are several sections:

- More Reports:** A grid of buttons including 'Quickviews', 'QuickChange', 'Create Notes in Bulk', 'Calculated Contract Income', 'Contract Charge Options', 'Billing Terms Listing', 'All ACTIVE', 'All INACTIVE', 'All LATE', 'ALL Contracts', 'ALL Auto-Renew / e-Sign Listing' (highlighted with a blue arrow), 'Contracts Due by Agency (Excel)', 'Contracts Due by Agency', 'Contracts Due by Brand', and 'Labels and Postcards'.
- Past Due:** A section with dropdowns for 'Late By Name' and 'By Address', and buttons for 'Past Due Notices' and 'Past Due List'. Below these are 'Days' (0-30, 31-60, 61-90) and 'Past Due' counts (61, 43, 14).
- Counts:** A section showing various counts: 'Active Count: 1927', 'Due in the next 30 Days: 122', 'Due in the next 60 Days: 145', 'Past Due Count: 122', '0-1 Month Past Due: 55', 'Total Past Due: 122', 'Non-Renew Last 30 days: 0', 'Non-Renew 31 - 60 days: 3', and 'Inactive Count: 1254'.
- Email Options:** A section with a dropdown for 'Choose Customer', a button 'EMAIL Contracts to Agency', and a button 'Email Reminders Due (datasheet)' (highlighted with a blue arrow).
- Renewals (Due):** A section with a button 'Print Cover Letters and Contracts', a date range selector 'Contracts Ending Between' (From: 04/01/2022, Thru: 04/30/2022), a button 'Print List for above dates', a button 'Active Customers by Renewal Contract Types (Uses Above Contract Dates)', and a button 'List of Initial and Renewal Contracts' (highlighted with a blue arrow). Below this is a 'Searches' section with dropdowns for 'Active by Name' and 'ActiveBy Address', and a table of 'Days' (0-30, 31-60, 61-90) and 'Due' counts (122, 145, 153).

Contract Listings: Print a listing of all your INITIAL and RENEWAL Contracts using the above dates.

Email Contracts and Reminders Due:

You can email Contracts as a PDF to your Agencies as well as send your Customers Reminders for upcoming Contract Renewals

Additions to Version 22 – (CONTRACTS)

Email Contract Renewals

Action

Action

Reminder

Contract Starts

Contract Ends

Last Name

First Name

Active

Due Emailed

Past Due Emailed

Email

View

Email

Past Due Notice

08/26/2020

08/26/2021

Kibbe

Barry

✓

02/16/2022

08/28/2019

Email@email.com

View

Email

Past Due Notice

09/04/2020

09/04/2021

Rollins

Albert W

✓

View

Email

Past Due Notice

10/01/2020

10/01/2021

Love

Britt

✓

09/27/2019

View

Email

Past Due Notice

10/01/2020

10/01/2021

Douglas

Justin M

✓

11/30/2021

11/30/2021

View

Email

Past Due Notice

10/01/2020

10/01/2021

Bradley

Shane & Wendy

✓

11/30/2021

11/30/2021

View

Email

Past Due Notice

10/01/2020

10/01/2021

Momaney-James

Sandra

✓

11/30/2021

11/30/2021

View

Email

Past Due Notice

10/10/2020

10/10/2021

Ogden

James & Kathryn

✓

View

Email

Past Due Notice

10/14/2020

10/14/2021

Sickels

Gary

✓

11/30/2021

11/30/2021

View

Email

Past Due Notice

10/26/2020

10/26/2021

Lachnitt

Paul

✓

View

Email

Past Due Notice

11/02/2020

11/02/2021

Jowers

William & Marcia

✓

11/25/2019

11/25/2019

View

Email

Past Due Notice

11/03/2020

11/03/2021

Calligos

Jonvincent

✓

11/25/2019

11/30/2021

View

Email

Past Due Notice

11/04/2020

11/04/2021

Martin

Franklin Brent

✓

09/09/2021

10/28/2020

View

Email

Past Due Notice

11/05/2020

11/05/2021

Phillips

Peggy

✓

11/30/2021

View

Email

Past Due Notice

11/05/2019

11/05/2021

Bass

Troy

✓

11/30/2021

View

Email

Past Due Notice

11/05/2020

11/05/2021

Sanders

Lynette

✓

View

Email

Past Due Notice

11/09/2020

11/09/2021

Nelson

Jeff

✓

View

Email

Past Due Notice

11/11/2020

11/11/2021

Pichardo

Alfonso

✓

09/30/2020

11/30/2021

View

Email

Past Due Notice

11/13/2020

11/13/2021

Richards

Benny G

✓

View

Email

Past Due Notice

11/16/2020

11/16/2021

Roan

Matthew & Makenzie

✓

11/30/2021

11/30/2021

View

Email

Past Due Notice

11/16/2020

11/16/2021

Gray, M.D.

Peter

✓

View

Email

Past Due Notice

11/21/2020

11/21/2021

Parks

James M

✓

View

Email

Past Due Notice

11/22/2020

11/22/2021

Koehler

Mary

✓

View

Email

Past Due Notice

11/26/2019

11/26/2021

Shurtleff

Brian

✓

11/30/2021

11/30/2021

View

Email

Past Due Notice

11/28/2020

11/28/2021

Duffett

Doug

✓

View

Email

Past Due Notice

11/28/2020

11/28/2021

Burns

Robert & Lori

✓

View

Email

Past Due Notice

11/29/2020

11/29/2021

Group #2

The Henry

✓

View

Email

Past Due Notice

11/30/2020

11/30/2021

Scroggins

Togy

✓

View

Email

Past Due Notice

12/01/2020

12/01/2021

Jackson

Pat

✓

View

Email

Past Due Notice

12/04/2020

12/04/2021

Alecio

Mario

✓

View

Email

Past Due Notice

12/04/2020

12/04/2021

Simonds

Ben

✓

View

Email

Past Due Notice

12/05/2020

12/05/2021

Fort

Stephen & Emily

✓

View

Email

Past Due Notice

12/06/2020

12/06/2021

Hayes

Orville Joe

✓

View

Email

Past Due Notice

12/07/2020

12/07/2021

Vaughan

Thomas

✓

View

Email

Past Due Notice

12/07/2020

12/07/2021

Stepping Stones Church

✓

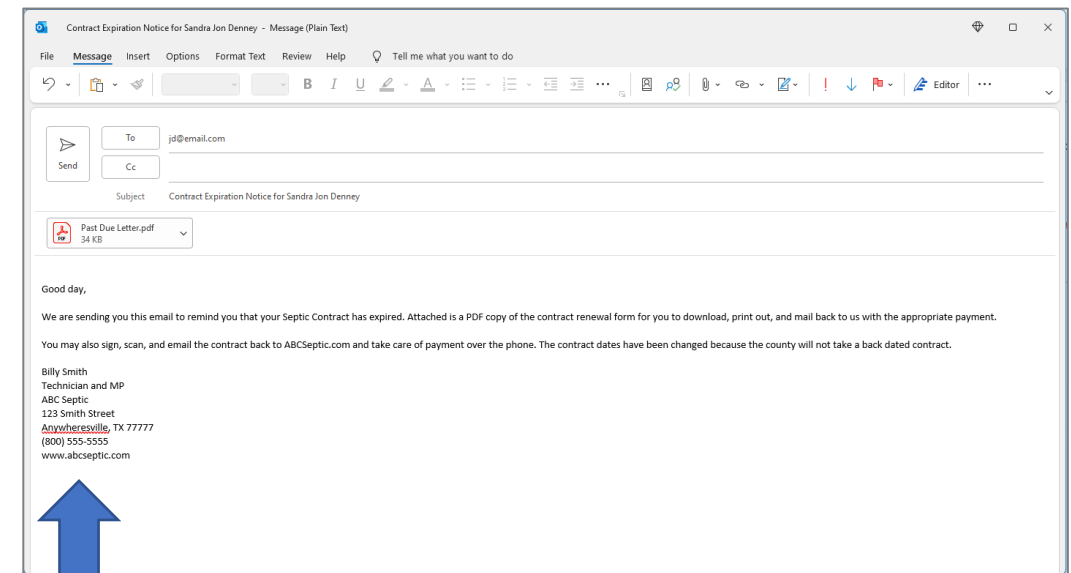
Total

Invoice

1 of 1927

No Filter

Search



Contracts Due Datasheets:

You can now EMAIL Contract Renewal Reminders OR send them a PAST DUE NOTICE quick and easy with a click of a button.

NEW EMAIL FORMATTING: We've enhanced the email to allow you to create your own personalized message body for the Contracts. Your full company information will now also show at the bottom.

ALL Other Additions to Version 22

Customer Contact List (Menu)– Added Field Columns to the query. Add Excel Export and Query read only view Added the Agency field to the Inspections by GPS Excel Exports

Added the Stop # field to the Mapping Queries (all of them)

Added the new fields in the Customer Table and the Maintenance Inspections Table to the “MMCustomer Table” and the “MMCustomer Inspection Table” for the Mail Merge to work.

Added Copy Buttons on the Main Phone to the Work Phone, the Work Phone to the Cell Phone, and the Cell Phone to the Alternate phone for quicker data entry. The action makes the phone that the button is clicked on move to the next phone below it IF it is blank and you answer the question to do so. If the next phone is different than the one you are wanting to paste from, you will have to answer a question to confirm the copy/paste action.

Changed the options in the EMAIL EXPORT TO AGENCIES menu. User will answer “YES” to send ALL INSPECTIONS. User will now answer “NO” to send only UNSENT INSPECTIONS.

Added a Question for the user to answer when they email a document from the Customer’s Menu. Is they answer ‘YES”, then a date stamp and comment will be added to the Comments Box on the Overview Tab.

Changed the Inspections Datasheet on the Main Inspections Tab to “Inspections Due List.” This is a datasheet that allows the user to filter the dates and email the customer a “Reminder” that their scheduled inspection is coming up. It will also put the current date into the “Last Date Emailed” and add a “Date Stamp” to the customer’s comments menu.

ALL Other Additions to Version 22

(Continued)

Got rid of the "Listings" menu that was the "older" mode and have gone to the datasheet format w/ queries

Re-ordered and re-labeled all the columns of the Excel Exports section outputs.

When creating Invoices, you can now give your customers a unique "Due days". Added the field "InvDueDays" to the Customer Table to store it for each record. If the Customer's Due Days is different from the "Global" default "Due Days" in the Master Files / Default Settings, it will not be overwritten.

Changed the "Zero Chlorine" warning label to not just automatically show on the menu OR Report. Now the user will be asked to respond Yes or No to putting the warning on those areas.

Updated / Reworked the "Customer Profile" and the Pumping "Profile with History" to show more information and recently added information like "Do Not Email", "Do Not Text", etc.

Add the ability to email the pumping documents.

Added/modified the "Auto-Renew / e-Signature" checkbox so that the user can check that the customer wants to be auto-renewed. These customers can be LEFT OFF the Contracts Due Printout if chosen.

"Re-worked" the Financial Tab in the Customer's Record. I took the "Open Listing" and the "Closed" listing off due to issues with refreshing the data. I added a "datasheet" that reacts instantly to changes and allows the user to see open invoices in red and closed invoices in gray. They can also Delete, Email, View, or Print the invoice from the listing.

DATABASE FIELD ADDITIONS

Maintenance Inspections

- **Timer** ("Short Text" Data Type, 10 Field Size, "OP;Non-OP;Reset;Repaired;Replaced;N/A" Value List)
- **Tank 4** (SludgeLevel4) ("Short Text" Data Type, 10 Field Size)
- **Floats** ("Short Text" Data Type, 10 Field Size, "Op;Non-Op;COS;N/A" Value List)
- **BATCheck** ("Yes/No" Data Type, 0 Default Value) (Biologically Accelerated Treatment)

Your Company Table

- **EmailMsgSC** (Long Text – Plain Text) (Standard Message for Service Contracts)
- **EmailMsgSI** (Long Text – Plain Text) (Standard Message for Inspections and Work Orders)
- **EmailMsgF** (Long Text – Plain Text) (Standard Message for Financials)
- **EmailMsgP** (Long Text – Plain Text) (Standard Message for Pumping)

Customer Table

- **InvDueDays** (Standard Number) (Not indexed) (Default Value = 0)

Invoices

- **ICellPhone** (Cell Phone stored on the Invoice)
- **IAltCellPhone** (Alternate Cell stored on the Invoice)
- **IWorkPhone** (Work Phone stored on the Invoice)

Proposals

- **PAltCellPhone** (Alternate Cell Stored on the Proposal)

DESIGN CHANGES

Main Menu
Graphics
changes

Customer
Menu Graphic
changes

Backup Menu

Invoices-
Existing

Invoices-New

Invoices
Report

Invoices
Report-W

Past Due
Invoice



FIXES

- The MASS INVOICE creation in the Contracts menu to include the “*Contract Type*” option if selected for each customer.
- Swapped the Open and Closed Invoice Listings on the Customer Menu with an Invoice Datasheet that has both open and closed. This corrected update issues when going to a new record.
- Fixed the Networking Menu to allow typing – not just searching
- “Re-worked” the Financial Tab in the Customer’s Record. I took the “Open Listing” and the “Closed” listing off due to issues with refreshing the data. I added a “datasheet” that reacts instantly to changes and allows the user to see open invoices in red and closed invoices in gray. They can also Delete, Email, View, or Print the invoice from the listing.
- Re-ordered and re-labeled all the columns of the Excel Exports section outputs.
- Corrected the Completed Inspection Results Email follow up to include ONLY the inspection selected – was including All the inspections for that customer.
- Got rid of the “Inspections Due Listings” menu that was the “older” List-Type mode and have gone to the datasheet format with queries and email functions

INTEGRATIONS

- **Cloud Platform –**

If you are looking to move to a fully mobile platform for Inspections and other Service, you can now move SAFE to this cloud or “Virtual” platform. This is a month-to-month service and is roughly \$40 / month per USER. There are additional features that could add to the cost. This is a customizable service.

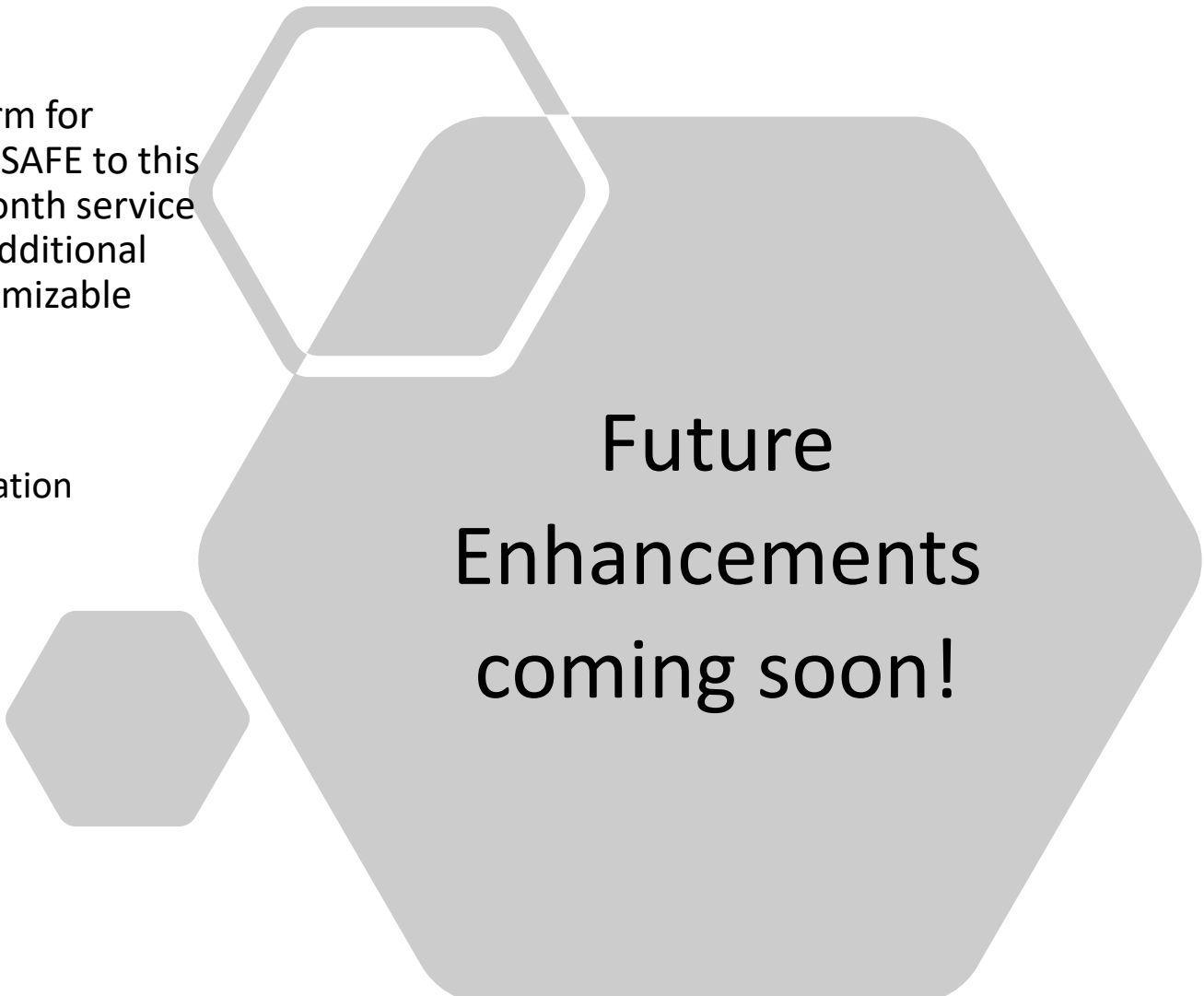
- **Artic Pro –**

Be able to seamlessly enter Inspections into an application provided by Artic Pro.

- **Inspect2Go –**

<https://inspect2go.com/septic>

Inspect2GO offers sewage and septic software for local environmental health agencies. The web/cloud-based solution is used for permitting, complaints, scheduling, program management and reporting. The solution includes an offline mobile app for inspection using iPad, Windows or Android tablets. Inspect in remote locations that have unreliable connectivity. Transfer historical data to the hosted database. SAFE Inspections can be imported into this Health Department web-based software.



Future
Enhancements
coming soon!

2022 Pricing and Services

Pricing Options	Includes one year of Support	Yearly Support	Data Conversion	Onsite Training
Full Pmt	\$1,600 + tax	\$350/Year	\$100/Hour	TBD
2 Pmts	\$850 / month + tax			
3 Pmts	\$600 / month + tax			
4 Pmts	\$475 / month + tax			
12 Pmts	\$145 / month + tax			

TESTIMONIALS

- “The go-to program for any aerobic septic business; great customer support, frequent updates, and it connects with most agencies for processing reports” — Texas Septic Co.
- “Safe Software is very user friendly and the technical support that we receive from them is excellent! The Safe Software program is a key part of our client database and it helps us communicate with different stakeholders within the wastewater industry.” — Jerrial (TX Service Co)



THE WAY TO GET
STARTED IS TO QUIT
TALKING AND BEGIN
DOING.

- Walt Disney

THANK YOU



- Jon Denney
- Owner
- SAFE Software
- Denton, TX