WHAT'S NEW FOR VERSION 23 & 24

- www.mysafesoftware.com

SAFE SOFTWARE

Private Company Version

Topics

- Introduction
- Features for Septic Companies
- Database Field Additions
- Design Changes
- Fixes
- Cloud Platform and Integrations
- 2023-24 Pricing

Introduction

jondenney@mysafesoftware.com
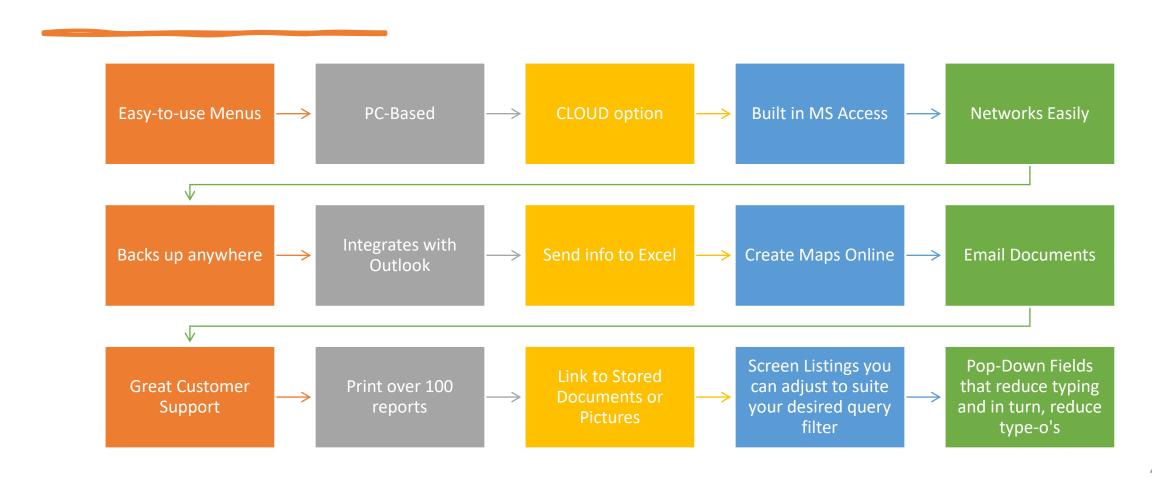
(940) 367-2246

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

Easy-to-use Menus	PC-Based	CLOUD option	Built in MS Access	Networks Easily
Backs up anywhere	Integrates with Outlook	Send info to Excel	Create Maps Online	Email Documents
Great Customer Support	Print over 100 reports	Link to Stored Documents or Pictures	Screen Listings you can adjust to suite your desired query filter	Pop-Down Fields that reduce typing and in turn, reduce type-o's

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		

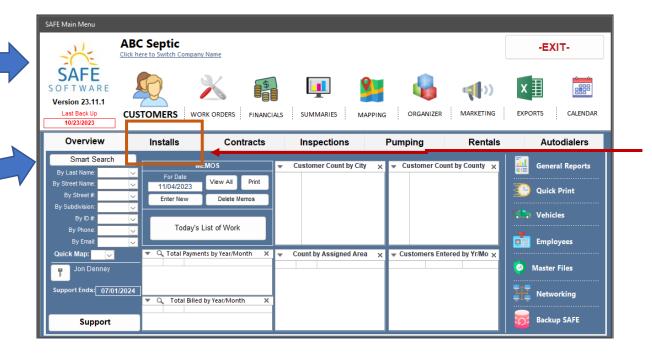# Additions to Version 23 & 24 – (MAIN MENU)

New Logo and Icons:
I know! A new graphic for a new version… we just like to keep looking forward!

SMART Search:
This allows you to search by…
- ID
- Fist and Last Name
- Street#
- Street Name
- Combined Address
- City
- State
- Zip
- County
- Subdivision
- Care of (Attention)
- Email Address
- And Customer Class

Installs Tab: We've added a tab for Install Listings and Reports. You can also see Active Warranties for these Installations.
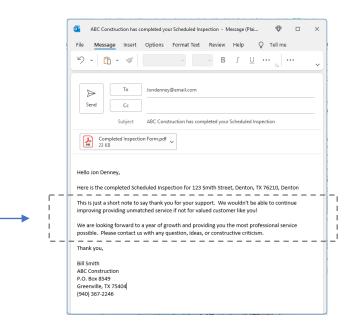
Additions to Version 23 & 24 – (EMAIL MESSAGES)

Email Message Options:
Create 4 Standard email messages for different areas of your business
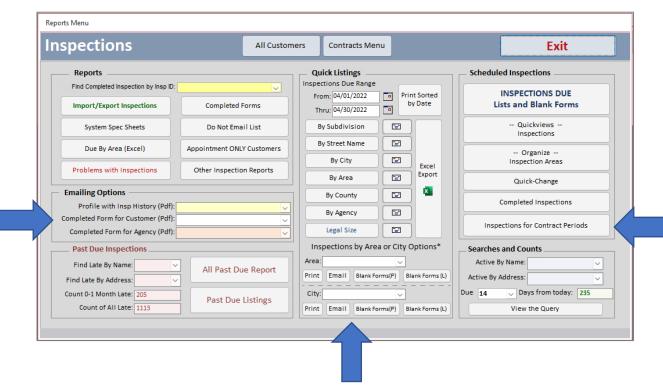
Email Enhancements:
Now you can send an email containing the Results Form as a PDF to the customer with a CUSTOM MESSAGE BODY created by you. This will be specific to the type of message you are sending (Contract, Inspection, etc.)

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.

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 (Plai...

File   Message   Insert   Options   Format Text   Review   Help   Tell me

B *I* U

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 23 & 24 –(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.
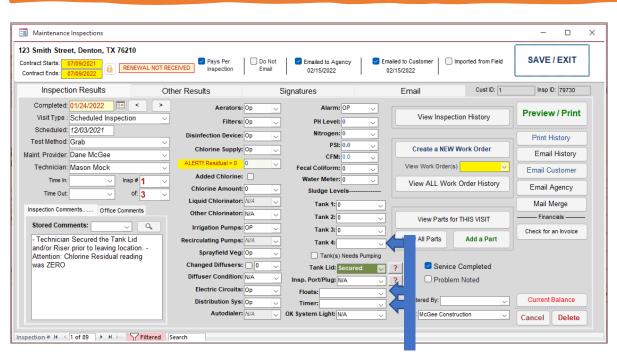
Inspection Audits:
Enhance the Completed Inspection Report to help you keep up to date on the number of Inspections performed on customers with Contract Ending Dates between dates you select.
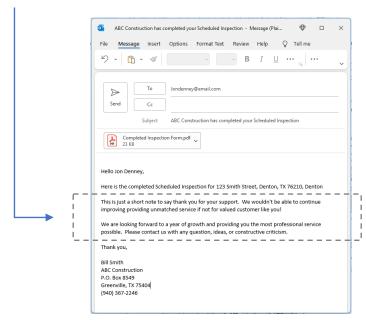
Inspections by Area or City Options:
Added an "Inspections by Area or City". Also added the ability to print or email the list and the blank forms from the "All Inspection Reports" menu

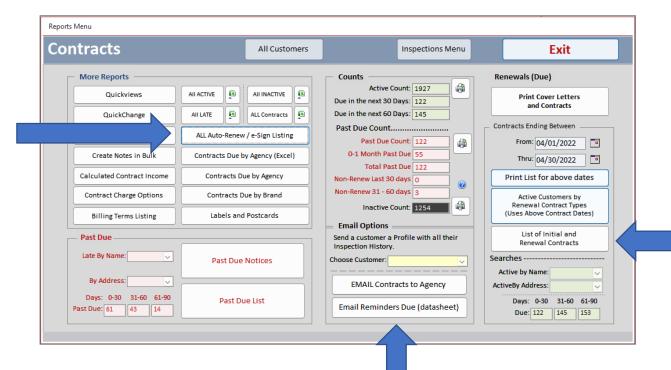# Additions to Version 23 – (INSPECTIONS)

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.

New Inspection Fields:
- Tank 4 (Sludge Level Reading for the 4th tank)
- Floats
- Timer

Additions to Version 23 & 24 – (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.
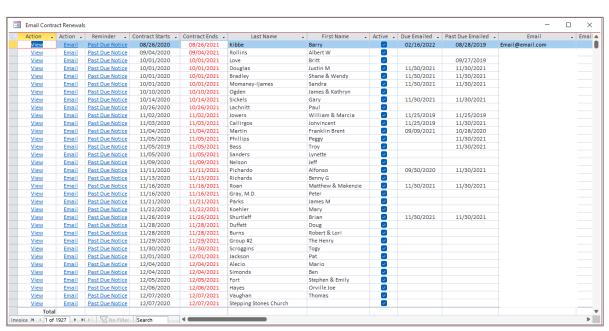

Contract Listings: Print a listing of all your INITIAL and RENEWAL Contracts using the above dates.

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
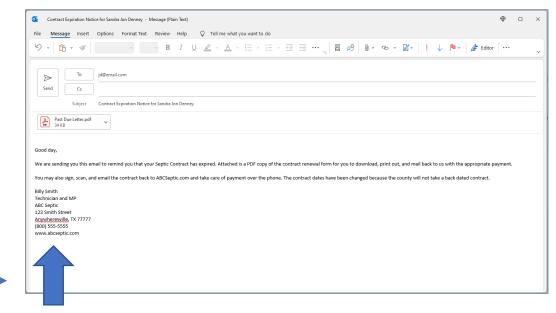
Additions to Version 23 & 24 –(CONTRACTS)

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 **23 & 24**

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 23 & 24 (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

Get Mobile!

- **The V2 Cloud Platform –**

  If you are looking to move to a fully mobile platform for Inspections and other Service, you can now move SAFE to a CLOUD or "Virtual" platform. This is a month-to-month service. There is a small monthly charge per user as well as the option to use MS Office Apps for Enterprise on the cloud. This service has opened the doors for field technicians and remote workers. All the data is "LIVE" and at your fingertips providing you have a cell or internet connection. Please contact us at questions@mysafesoftware.com for more details.

- **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.
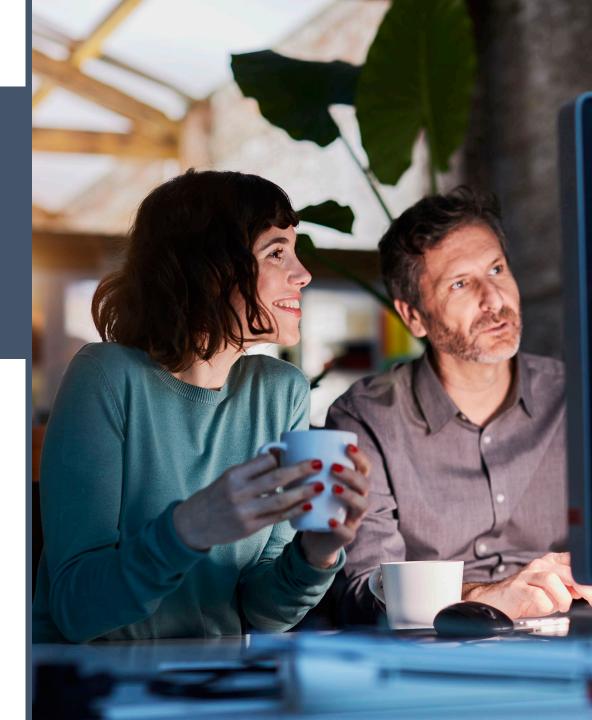
CLOUD AND OTHER SOFTWARE PLATFORM INTEGRATIONS

2023-2024 Pricing and Services

Pricing Options	Includes 1 year of Support	Yearly Support (after)	Data Conversion	Onsite Training
Full Payment (One-time)	$1,700 + tax	$300/Year	$100/Hour	TBD
2 Pmts	$900 / month + tax			
3 Pmts	$650 / month + tax			
4 Pmts	$490 / month + tax			
6 Pmts	$340 / month + tax			
12 Pmts	$160 / 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