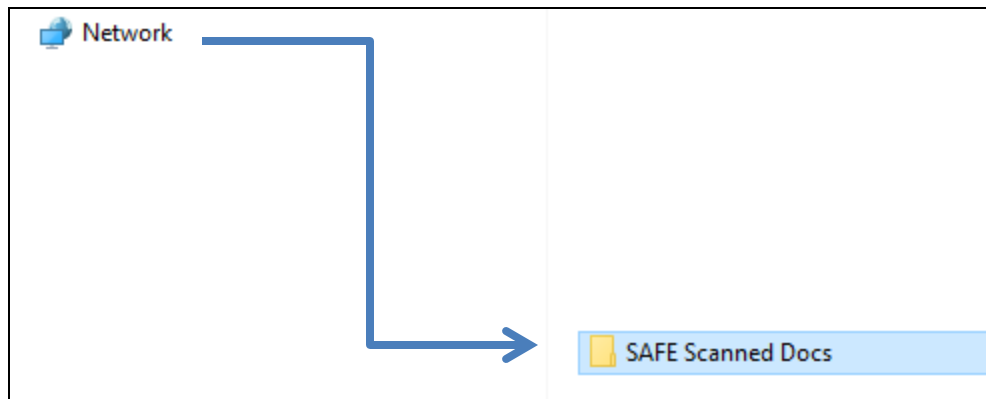


Scanned Documents

Steps for setting up a scanned documents
folder in the SAFE Software Program
(Agency and Private Company Version
instructions)

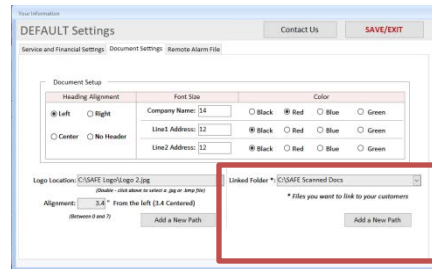
Steps

- Create a folder that will act as the “MASTER FOLDER”. This folder will be the one that is linked to the SAFE Program.
- **IMPORTANT:** If you have multiple people using SAFE, you should put the folder out on the “server” or “main computer” so everyone can access the scanned documents.
- Once you create this folder, open SAFE

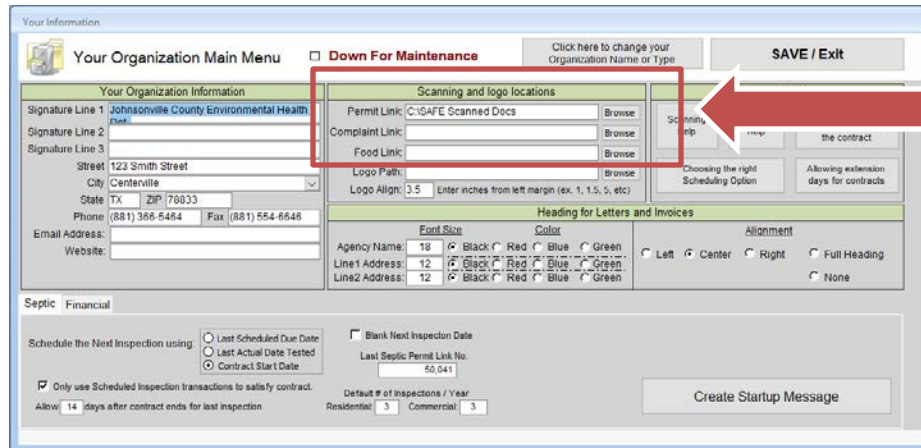


Step (continued)

- Go to the Master Files from the MAIN MENU
 - Private Companies** go to the Master Files / Default Settings menu / Documents Tab.



- Agencies** go to the Master Files / Your Organization menu



- Find the Scanned Documents Link field.
- Double-click on the white area of that pop-down field

Steps (Continued)

- Browse to find the location of the Scanned Folder you created, select it, then click OK
- Creating a sub-folder for a Customer/Permit Record
 - Go to that record and click “Linked Documents” on the Private Version or “Documents/Linked Documents” on the Agency version
- If you haven’t created a folder for that record in the Scanned Documents folder, SAFE will create one for you. The name of the folder will be the ID Number (for Private Companies) or you will have the choice to make it the ID Number or the Permit Number (for Agencies).

Steps (Continued)

- You can save all your scanned documents or image files under each specific “sub-folder” in the Scanned Documents folder
- The specific document that is scanned will be visible ONLY for that record when you click on the link in SAFE. In other words, you do not have to sort through all the scanned images or files to find the one for that record
- That is all you have to do.
- Call (800) 604-7351 or email us at thesafeprogram@gmail.com for more assistance