

# WHAT'S NEW FOR VERSION 23 & 24

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- [www.mysafesoftware.com](http://www.mysafesoftware.com)



Private Company Version

SAFE Main Menu

ABC Septic  
[Click here to Switch Company Name](#)

SAFE SOFTWARE  
Version 23.11.1  
Last Back Up 10/23/2023

CUSTOMERS WORK ORDERS FINANCIALS SUMMARIES MAPPING ORGANIZER MARKETING EXPORTS CALENDAR

Overview Installs Contracts Inspections Pumping Rentals Autodialers

Smart Search  
By Last Name:   
By Street Name:   
By Street #:   
By Subdivision:   
By ID #:   
By Phone:   
By Email:   
Quick Map:   
Jon Denney  
Support Ends: 07/01/2024  
Support

MEMOS  
For Date: 11/04/2023 View All Print  
Enter New Delete Memos  
Today's List of Work

Customer Count by City x Customer Count by County x

Total Payments by Year/Month x Count by Assigned Area x Customers Entered by Yr/Mo x

Total Billed by Year/Month x

General Reports  
Quick Print  
Vehicles  
Employees  
Master Files  
Networking  
Backup SAFE

-EXIT-



# Topics

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- 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**

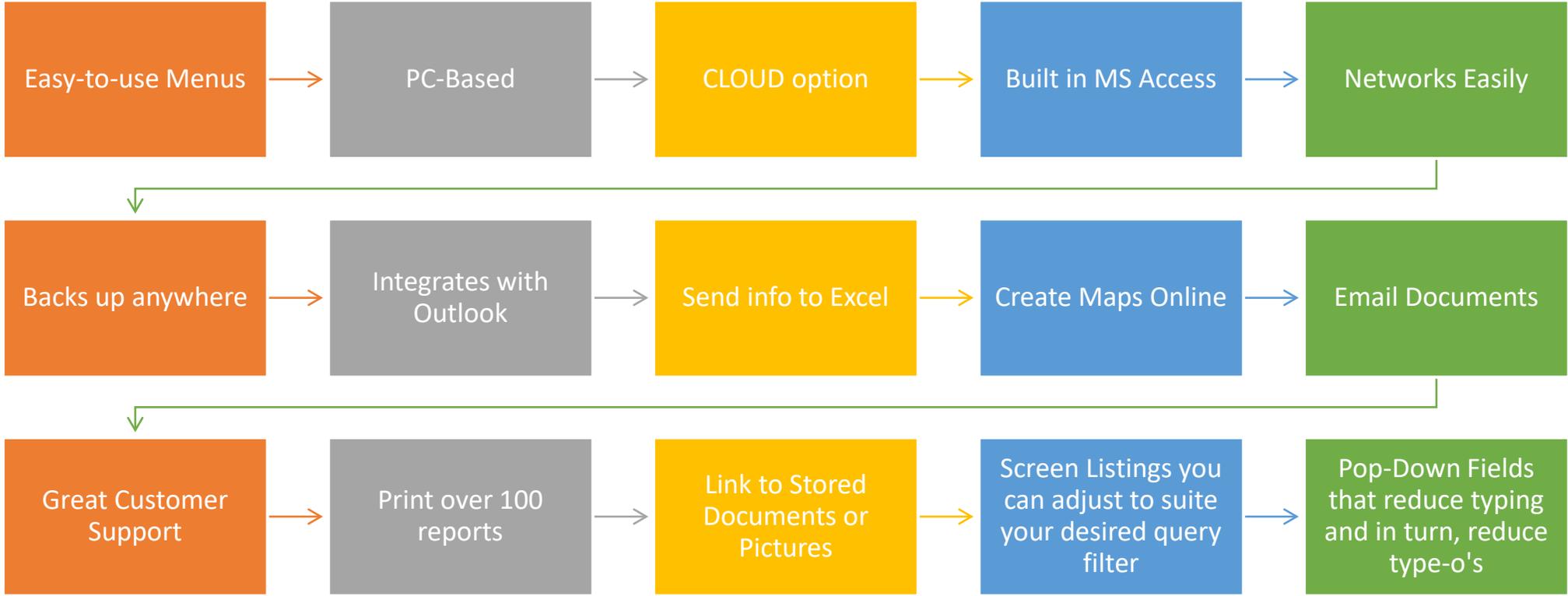
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**SAFE Software** was developed in 2000 with the purpose of allowing the user to easily enter system data, manage customers, schedule important dates, print and email documents, and keep information safe and sound in YOUR possession. It is a "PC-Based" 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 are 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)

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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

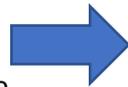
Track Employees and Vehicle Maintenance and Mileage

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
- First and Last Name
- Street#
- Street Name
- Combined Address
- City
- State
- Zip
- County
- Subdivision
- Care of (Attention)
- Email Address
- And Customer Class

SAFE Main Menu

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Overview Installs Contracts Inspections Pumping Rentals Autodialers

Smart Search

By Last Name: [dropdown]  
By Street Name: [dropdown]  
By Street #: [dropdown]  
By Subdivision: [dropdown]  
By ID #: [dropdown]  
By Phone: [dropdown]  
By Email: [dropdown]

Quick Map: [dropdown]

Jon Denney  
Support Ends: 07/01/2024

Support

For Date: 11/04/2023 View All Print  
Enter New Delete Memos

Today's List of Work

Total Payments by Year/Month x  
Count by Assigned Area x  
Customers Entered by Yr/Mo x  
Total Billed by Year/Month x

Customer Count by City x  
Customer Count by County x

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Networking  
Backup SAFE

**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

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.)

ABC Construction has completed your Scheduled Inspection - Message (Plat...)

File Message Insert Options Format Text Review Help Tell me

To: Jondenney@email.com

Send 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

**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 .

# Additions to Version 23 & 24 – (INSPECTIONS)

Reports Menu

## Inspections

All Customers Contracts Menu Exit

**Reports**

Find Completed Inspection by Insp ID: [Dropdown]

Import/Export Inspections Completed Forms

System Spec Sheets Do Not Email List

Due By Area (Excel) Appointment ONLY Customers

Problems with Inspections Other Inspection Reports

**Emailing Options**

Profile with Insp History (Pdf): [Dropdown]

Completed Form for Customer (Pdf): [Dropdown]

Completed Form for Agency (Pdf): [Dropdown]

**Past Due Inspections**

Find Late By Name: [Dropdown] All Past Due Report

Find Late By Address: [Dropdown]

Count 0-1 Month Late: 205 Past Due Listings

Count of All Late: 1113

**Quick Listings**

Inspections Due Range

From: 04/01/2022 Print Sorted by Date

Thru: 04/30/2022

By Subdivision [Dropdown]

By Street Name [Dropdown]

By City [Dropdown]

By Area [Dropdown]

By County [Dropdown]

By Agency [Dropdown]

Legal Size [Dropdown]

Excel Export

**Scheduled Inspections**

**INSPECTIONS DUE Lists and Blank Forms**

-- Quickviews -- Inspections

-- Organize -- Inspection Areas

Quick-Change

Completed Inspections

Inspections for Contract Periods

**Searches and Counts**

Area: [Dropdown]

Active By Name: [Dropdown]

Active By Address: [Dropdown]

Due: 14 Days from today: 235

View the Query

### 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)

## New Inspection Fields:

- Tank 4 (Sludge Level Reading for the 4<sup>th</sup> 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.

# 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.

Reports Menu

Contracts All Customers Inspections Menu Exit

More Reports

Quickviews All ACTIVE All INACTIVE

QuickChange All LATE ALL Contracts

ALL Auto-Renew / e-Sign Listing

Create Notes in Bulk Contracts Due by Agency (Excel)

Calculated Contract Income Contracts Due by Agency

Contract Charge Options Contracts Due by Brand

Billing Terms Listing Labels and Postcards

Past Due

Late By Name: Past Due Notices

By Address: Past Due List

Days: 0-30 31-60 61-90

Past Due: 61 43 14

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

Inactive Count: 1254

Email Options

Send a customer a Profile with all their Inspection History.

Choose Customer:

EMAIL Contracts to Agency

Email Reminders Due (datasheet)

Renewals (Due)

Print Cover Letters and Contracts

Contracts Ending Between

From: 04/01/2022

Thru: 04/30/2022

Print List for above dates

Active Customers by Renewal Contract Types (Uses Above Contract Dates)

List of Initial and Renewal Contracts

Searches

Active by Name:

ActiveBy Address:

Days: 0-30 31-60 61-90

Due: 122 145 153

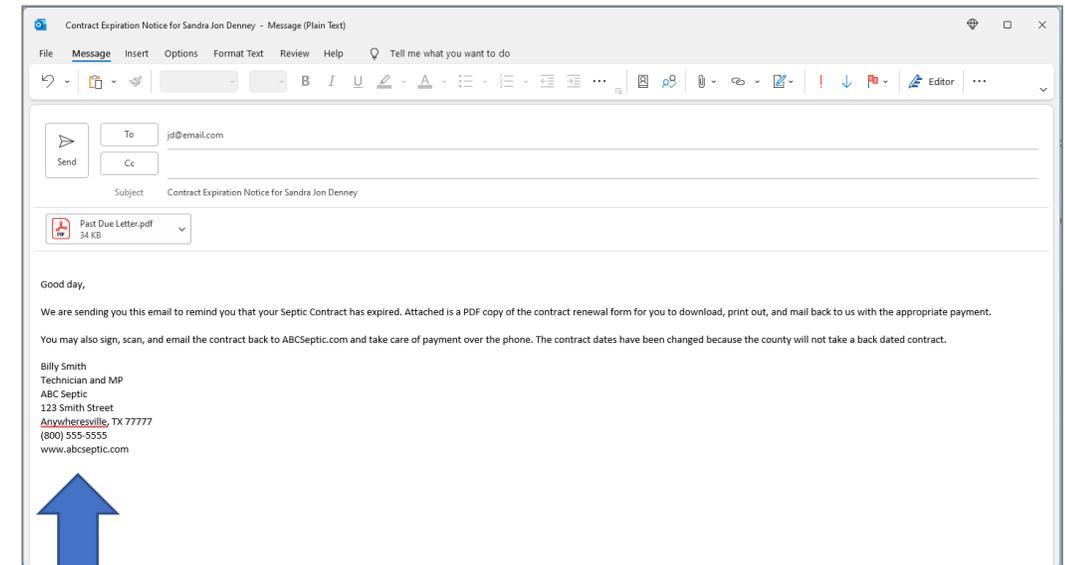
**Contract Listings:** Print a listing of all your INITIAL and RENEWAL Contracts using the above dates.

## 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 23 & 24 – (CONTRACTS)

Action	Reminder	Contract Starts	Contract Ends	Last Name	First Name	Active	Due Emailed	Past Due Emailed	Email
View	Past Due Notice	08/26/2020	08/26/2021	Kibbe	Barry	✓	02/16/2022	08/28/2019	Email@email.com
View	Past Due Notice	09/04/2020	09/04/2021	Rollins	Albert W	✓			
View	Past Due Notice	10/01/2020	10/01/2021	Love	Britt	✓		09/27/2019	
View	Past Due Notice	10/01/2020	10/01/2021	Douglas	Justin M	✓	11/30/2021	11/30/2021	
View	Past Due Notice	10/01/2020	10/01/2021	Bradley	Shane & Wendy	✓	11/30/2021	11/30/2021	
View	Past Due Notice	10/01/2020	10/01/2021	Momaney-Ijames	Sandra	✓	11/30/2021	11/30/2021	
View	Past Due Notice	10/10/2020	10/10/2021	Ogden	James & Kathryn	✓			
View	Past Due Notice	10/14/2020	10/14/2021	Sickels	Gary	✓	11/30/2021	11/30/2021	
View	Past Due Notice	10/26/2020	10/26/2021	Lachnitt	Paul	✓			
View	Past Due Notice	11/02/2020	11/02/2021	Jowers	William & Marcia	✓	11/25/2019	11/25/2019	
View	Past Due Notice	11/03/2020	11/03/2021	Callirgos	Jonvincent	✓	11/25/2019	11/30/2021	
View	Past Due Notice	11/04/2020	11/04/2021	Martin	Franklin Brent	✓	09/09/2021	10/28/2020	
View	Past Due Notice	11/05/2020	11/05/2021	Phillips	Peggy	✓		11/30/2021	
View	Past Due Notice	11/05/2019	11/05/2021	Bass	Troy	✓		11/30/2021	
View	Past Due Notice	11/09/2020	11/09/2021	Sanders	Lynette	✓		11/30/2021	
View	Past Due Notice	11/09/2020	11/09/2021	Nelson	Jeff	✓		11/30/2021	
View	Past Due Notice	11/11/2020	11/11/2021	Pichardo	Alfonso	✓	09/30/2020	11/30/2021	
View	Past Due Notice	11/13/2020	11/13/2021	Richards	Benny G	✓		11/30/2021	
View	Past Due Notice	11/16/2020	11/16/2021	Roan	Matthew & Makenzie	✓	11/30/2021	11/30/2021	
View	Past Due Notice	11/16/2020	11/16/2021	Gray, M.D.	Peter	✓		11/30/2021	
View	Past Due Notice	11/21/2020	11/21/2021	Parks	James M	✓		11/30/2021	
View	Past Due Notice	11/22/2020	11/22/2021	Koehler	Mary	✓		11/30/2021	
View	Past Due Notice	11/26/2019	11/26/2021	Shurtleff	Brian	✓	11/30/2021	11/30/2021	
View	Past Due Notice	11/28/2020	11/28/2021	Duffett	Doug	✓		11/30/2021	
View	Past Due Notice	11/28/2020	11/28/2021	Burns	Robert & Lori	✓		11/30/2021	
View	Past Due Notice	11/29/2020	11/29/2021	Group #2	The Henry	✓		11/30/2021	
View	Past Due Notice	11/30/2020	11/30/2021	Scroggins	Togy	✓		11/30/2021	
View	Past Due Notice	12/01/2020	12/01/2021	Jackson	Pat	✓		11/30/2021	
View	Past Due Notice	12/04/2020	12/04/2021	Alecio	Mario	✓		11/30/2021	
View	Past Due Notice	12/04/2020	12/04/2021	Simonds	Ben	✓		11/30/2021	
View	Past Due Notice	12/05/2020	12/05/2021	Fort	Stephen & Emily	✓		11/30/2021	
View	Past Due Notice	12/06/2020	12/06/2021	Hayes	Orville Joe	✓		11/30/2021	
View	Past Due Notice	12/07/2020	12/07/2021	Vaughan	Thomas	✓		11/30/2021	
View	Past Due Notice	12/07/2020	12/07/2021	Stepping Stones Church		✓		11/30/2021	



## 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

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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

- **PAItCellPhone** (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!

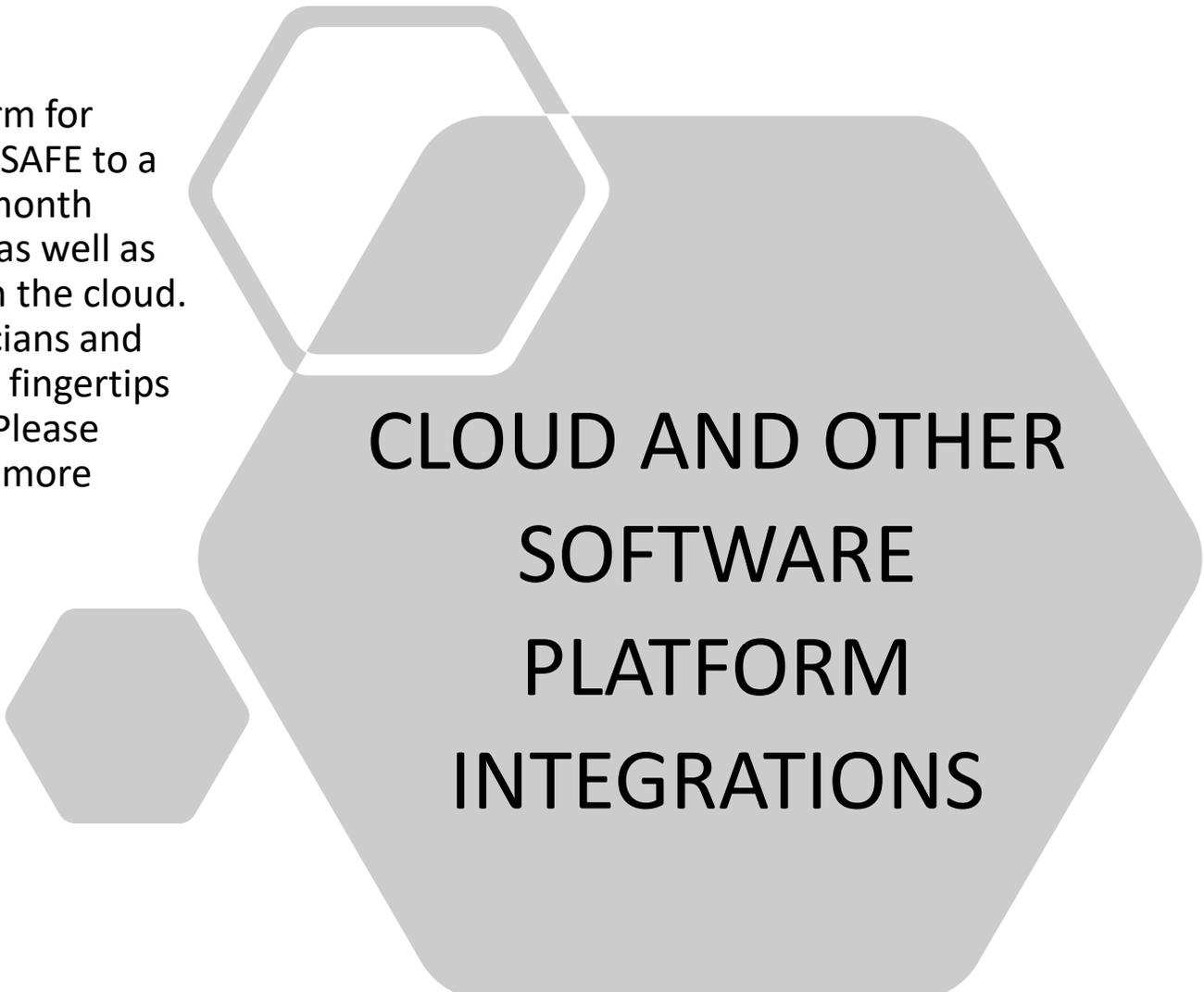
- **The V2 Cloud Platform –**

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](mailto: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