

SAFE SOFTWARE



INSTRUCTION MANUAL

PART 2

CUSTOMER MENU



INSTRUCTION MANUAL

VERSION 11

SAFE

Professional Septic, LLC Judy Pearson - EXIT -

SAFE SOFTWARE
Version 11.1 Copyright 2011

Customers Work Orders Financials Reminders Organizing Summaries

Overview -----

Septic Contracts Septic Inspections Pumping Rentals Remote Alarms Vehicles Spreadsheets

Memos and Notes
Date: 06/29/2011
View or Add New
Print All Print Range
Delete Range of Memos

Utilities and Options
Master Files
Connect to a Network
Backup Data
Employees
Switch Users (Login)
Switch Names

Quick Search
Site Address: [?] Customer Listings Customer Quickviews Miscellaneous Reports
Last Name: [?] Company Listings Customer Counts Customers to Contact
Email To: [?]
Map: [?]

Customers by Name	Count / City Name	Count / Subdivision	Count / County Name
A+ Plumbing,	158 Flower Mound	3 Hills of Argyle	589 Denton
Absolute Septic Pumping,	107 Argyle	3 Guy James Ranc	43 Cooke
ACE School of Tomorrow,	102 Double Oak	1 Wichita Creek Es	4 Wise
ACE School of Tomorrow,	72 Sanger	1 Sunrise Bay	4 Tarrant
Adkins,Chris	47 Justin	1 Lake Kiowa	4 Grayson
Ahrweiler,Mary & Joerg	34 Copper Canyon	1 Hidden Falls Ran	
Alford,Mark	33 Bartonville	1 Hidden Falls Ran	
Allegro,Robert	32 Valley View	1 Hickory Hill Estate	
Alvarado,Diana	27 Krum	1 The Oaks	
Alvarez,JoEllen	23 Lewisville		
Amen,Darrell	19 Aubrey		
American Pet Spa,	17 Gainesville		

Total Customers Entered: 833 Total Cities in Master Files: 38 Subs in Master Files: 3 Total Counties in Master Files: 6



Customer Menu Explained



SAFE Customers

Alerts Status **Active Contract** 2011-1123

ID No: 1 626C Entered on: 11/11/2004 Current Balance: \$634.19

Pref: Mr. Commercial Problem Do Not Service

Open Invoices: \$634.19

Find By Name: Find By ID No: By Street #:

First: Mark All Invoices: \$1,204.19

Last: Alford All Payments: \$650.00

St. No: 4001 Rothschild Dr. Proposals: Install Disposal

City: Flower Mound TX 75022 Service Rental Pumping Monitor

Customer Types: Monitor

Customer Overview | Contract | Inspections | System Info | Companies | Pumping | Rentals | Remote Alarm Monitoring

Mailing is the same as Site Address

Mailing Addr: 4001 Rothschild Dr. Profile

Mail City: Flower Mound TX 75022

Care of: MapKey: 626C

Subdivision: Guy James Ranch Lot: Block:

County: Denton

Email: markalford@grandecom.net Add Contacts

Reference: Flower Mound

Comments:

Entered By:

Phone Numbers: Appointment Only

Home: (972) 874-7800

Work:

Work Ext:

Cell:

At:

Fax:

Important Dates: Contract Start: 05/20/2011 Contract Ends: 05/20/2012 Next Insp: 09/20/2011 Inspection History

Denton County Environmental Health
Aqua Aire
Aerobic
Surface Application
Justin Harris

SAVE / EXIT
New Customer
CANCEL / EXIT
Delete Record
Work Orders
Documents
Notes
New Invoice
Open Invoices
All Invoices
All Pmts
Proposals
Maps
GPS Info

Record: 1 No Filter Search

Main Menu Explained: Those boxes in Red are new for version 10.0

The screenshot displays the 'SAFE Customers' software interface. The main window shows customer details for 'Mark Alford' with an 'Active Contract' status. The interface includes a top navigation bar with 'Alerts', 'Financial Overview', and 'Searches'. A left sidebar contains icons for 'Alert Pictures and Links', 'Email Notes', 'Map', 'GPS Map', 'Magnify Button', and 'Mailing Address'. The main content area is divided into sections for 'Customer Overview', 'Contract', 'Inspections', 'System Info', 'Companies', 'Pumping', 'Rentals', and 'Remote Alarm Monitoring'. A right sidebar contains buttons for 'SAVE / EXIT', 'New Customer', 'CANCEL / EXIT', 'Delete Record', 'Work Orders', 'Documents', 'Notes', 'New Invoice', 'Open Invoices', 'All Invoices', 'All Pmts', 'Proposals', 'Maps', and 'GPS Info'. A bottom status bar shows 'Record: 1' and 'No Filter Search'. Red callouts highlight new features for version 10.0: 'Alert Checkboxes' (checkboxes for Commercial, Problem, Do Not Service), 'Profile Printout and Email Option' (Profile button with print and email icons), and 'Internet Map-link Options and GPS Linking' (GPS icon in the left sidebar).

Customer Status Labels

Alert Checkboxes

Searches

Financial Overview

Alert Pictures and Links

Email Notes

Map

GPS Map

Magnify Button

Mailing Address

Additional Contacts menu

Profile Printout and Email Option

Internet Map-link Options and GPS Linking

General Comments

Customer Overview

Contract

Inspections

System Info

Companies

Pumping

Rentals

Remote Alarm Monitoring

SAVE / EXIT

New Customer

CANCEL / EXIT

Delete Record

Work Orders

Documents

Notes

New Invoice

Open Invoices

All Invoices

All Pmts

Proposals

Maps

GPS Info

Status: Active Contract

ID No: 1

Entered on: 11/11/2004

Prefix: Mr.

Commercial

Problem

Do Not Service

First: Mark

Last: Alford

St. No: 4001

Rothschild Dr.

City: Flower Mound

TX 75022

Current Balance: \$634.19

Open Invoices: \$1,284.19

All Invoices: \$1,284.19

All Payments: \$650.00

Proposals

Find By Name:

Find By ID No:

By Street #:

More Search Options

Customer Types

Install

Disposal

Service

Rental

Pumping

Monitor

Customer Overview

Mailing is the same as Site Address

Mailing Addr: 4001 Rothschild Dr.

Mail City: Flower Mound

Care of:

Subdivision: Guy James Ranch

County: Denton

Email: markalford@grandecom.net

Reference: Flower Mound

Comments:

Profile

Phone Numbers

Appointment Only

Home: (972) 874-7800

Work:

Work Ext:

Cell:

Alt:

Fax:

Important Dates

Contract Start: 05/20/2011

Contract Ends: 05/20/2012

Next Insp.: 09/20/2011

Inspection History

Denton County Environmental Health

Aqua Aire

Aerobic

Surface Application

Justin Harris

Entered By

Record: 1

No Filter Search

Customer Menu with Customer Info Tab

SAFE Customers

Alerts Status: **Active Contract** Inspection Late

ID No: 1 626C Entered on: 11/13/2003

Prefix: Mr. Commercial Problem Do Not Service

First: Mark

Last: Alford

St. No: 4001 Rothschild Dr.

City: Flower Mound TX 75022

Current Balance: \$0.00

Open Invoices: \$675.00

All Invoices: \$675.00

All Payments: \$675.00

Proposals

Find By Name: Find By ID No: By Street Name: More Searches

Customer Types: Install Disposal Service Rental Pumping Monitor

SAVE / EXIT

New Customer

CANCEL / EXIT

Delete Record

Work Orders

Documents

Notes

New Invoice

Open Invoices

All Invoices

All Pmts

Proposals

Maps

GPS Info

Customer Overview Contract Inspections System Info Companies Pumping Rentals Remote Alarm Monitoring

Mailing is the same as Site Address

Mailing Addr: 4001 Rothschild Dr. Profile

Mail City: Flower Mound TX 75022 MapKey: 626C

Car of: Subdivision: County: Denton

Email: markalford@grandecom.net Add Contacts

Reference: Flower Mound

Comments:

Entered By:

Phone Numbers: Appointment Only

Home: (972) 874-7800

Work: Work Ext: Cell: All: Fax:

Important Dates: Contract Start: 01/26/2011 Contract Ends: 01/26/2012 Next Insp.: 03/01/2011

Flower Mound Aqua Aire Aerobic With Chlorine Surface Application Judy Malone

Record: 1 of 834 No Filter Search

ID Number: Unique numbers you assign your customers. After you have entered a few ID's, you will notice that the previous ID will show on the next available entry for the customer. This will allow you to enter the next ID accordingly. ID's CAN NOT BE CHANGED ONCE CREATED. They are like books in a bookshelf. Once a book is removed (ID is deleted), there is a gap on the shelf. You can easily assign the missing ID to a new customer. Most people will use the ID as a count – first customer is ID#1, second customer is ID#2, etc.

Permit Number: Enter the number for the Permit issued by the county or agency.

Owner Name/Address: Enter the Owner's information here. You can double click on "City" to get a "Cities Table". Once you have entered a city and state, you can assign "Default Zip Codes." You can choose from several zip codes within one city. The "Default Area" is an area that you assign that particular city/zip code. Every time that city/zip code is entered, the default area will be automatically assigned. See Setting up a Service Area for more help. Also enter any phone numbers here for the customer.

Locating a Customer: Use a Quick Name Search Function. This feature will help you locate a customer quickly and efficiently. You may also select many ways to find your particular customer. All selections are pop-down screens that will instantly show you a listing of your customers.

Click Cancel if you want to VOID all entries you have made for the customer. Click SAVE/EXIT if you want to save your Customer entry information.

TO DELETE A CUSTOMER: Click RECORDS / Find the Customer / Click EDIT (top left corner of the computer screen) / Click SELECT RECORD / Click DELETE RECORD - BE VERY CAREFUL DURING THE DELETION OF A CUSTOMER. THE NEXT RECORD WILL POP-UP WHEN YOU CLICK DELETE RECORD – DO NOT BE ALARMED, YOU ARE NOT WILL ONLY DELETE THE CUSTOMER YOU WERE VIEWING AT THE TIME YOU SELECTED DELETE.

Find By Name: Find By ID No: By Street Name: More Searches

Record: 1 of 834 No Filter Search

Find By Search Methods: Pop-Down Selections

By Location: Street #, Street Name, Lot, Block, Subdivision, City, Area, Pumping Area, Rental Area

By Contact Info: ID #, Home Phone, Work Phone, Reference #, New Search, Miscellaneous: HOA, Previous Svc. Co.

By System Specs: Permit #, System Serial #, Aerator Serial #, Discharge Serial #, Builder/Developer, Designer/Engineer, Site Evaluator, Installer, Distributor, Manufacturer, Service Company

← Important keys
Search, Save, Exit, Cancel,
Navigate through records,
Help

New Customer
CANCEL / EXIT
Delete Record

Customer Command Buttons— Created to help you click and access a desired task without having to navigate to that particular screen. The date at the top of the screen will allow you to double click into any date field and automatically show that particular date.

The screenshot displays the 'SAFE Customers' application window. At the top, the status is 'Active Contract' and 'Inspection Late'. The customer ID is 1, entered on 11/13/2003. The customer's name is Mark Alford, located at 4001 Rothschild Dr., Flower Mound, TX 75022. The current balance is \$0.00, with open invoices totaling \$675.00 and all payments totaling \$675.00. The interface includes a navigation menu with tabs for Customer Overview, Contract, Inspections, System Info, Companies, Pumping, Rentals, and Remote Alarm Monitoring. A vertical sidebar on the right contains command buttons: SAVE / EXIT, navigation arrows, New Customer, CANCEL / EXIT, Delete Record, Work Orders, Documents, Notes, New Invoice, Open Invoices, All Invoices, All Pmts, Proposals, Maps, and GPS Info. The Work Orders, Documents, Notes, New Invoice, Open Invoices, All Invoices, All Pmts, Proposals, Maps, and GPS Info buttons are highlighted with a red box. The bottom of the window shows a record count of 1 of 834 and a search bar.

Click on any of these selections to go to your desired menu.

General Information:

You can enter all of the customer's information on the main customer menu. If the customer's physical address is the same as the mailing address, check the box to copy it to the mailing address. If you do not put a mailing address in, the physical address will default as the mailing address as well.

Fill In

The screenshot displays the 'SAFE Customers' software interface. The main window is titled 'SAFE Customers' and shows a customer record for 'Mark Alford'. The status is 'Active Contract' and the inspection date is '11/13/2003'. The address is '4001 Rothschild Dr., Flower Mound, TX 75022'. The contact information includes 'markalford@grandecom.net'. The interface includes various tabs like 'Contract', 'Inspections', 'System Info', etc., and a sidebar with buttons for 'New Customer', 'Delete Record', 'Work Orders', etc. A red box highlights the main customer information area, and a red arrow points from the 'Fill In' text to this area.

General Info:

Physical Address: Enter the physical address for the customer. If you need to add a city, click the "+" button. Click the box that says "Mailing is the same as physical" if you want to move the physical address to the mailing address.

Optional Mailing Address: Enter a different mailing address for a customer, if necessary, for the selected customer. Owners of mobile home parks are one example of a need for this screen. They may have several different systems scattered throughout your service area. You will be able to mail all of your necessary documents to this person. Enter "Care of" if the person receiving the documentation is different than the person that is located at the physical site.

Subdivision: Keep the information or description of the Subdivision the customer resides in.

County: This is the county where the system is located. This is a pop-down screen that you can double click to enter a new county into the Master Files section of the program. Entries will be permanently stored.

Email: Store the customer's email address here.

General Comments: These have been moved to the NOTES tab to reduce clutter. Click on the Box to enlarge the comments. This is helpful if you have poor vision or want to view it better.

Enlarge Comments: For you seeing impaired people. Click this box if you want to view the comments larger. Click the box again to make them disappear.

Phones: Enter all the phone numbers for this account. Click the Magnifying glass to go to another menu that contains a larger view of these numbers.

Important Dates: Quickly view the Septic Contract Start and End Dates as well as the Next Inspection Date.

ALERTS, Customer Types & Commercial Customers:

Commercial Customer Checkbox: Check this box if the customer is a Commercial Account.

If the commercial box is checked, then the Salutation, First Name, Middle Initial, and the Suffix will be hidden. This also aids in viewing the correct information.

Customer Since: Enter the date that this customer was entered into the system or became your customer.

Appointment Box: Click this box if the account needs to be contacted before service is performed.

Problem box: This box can be checked if there is any problem or issue with this account.

Customer Profile: Print the Customer's profile. It also will contain a history of past inspections.

Site Profile: Click this to print out a Site Profile of the customer. Contains all associated companies.

Additional Contacts: Add additional people under this account. Great for Rental or Commercial Accounts.