



# INSTRUCTION MANUAL

## MASTER FILES

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

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

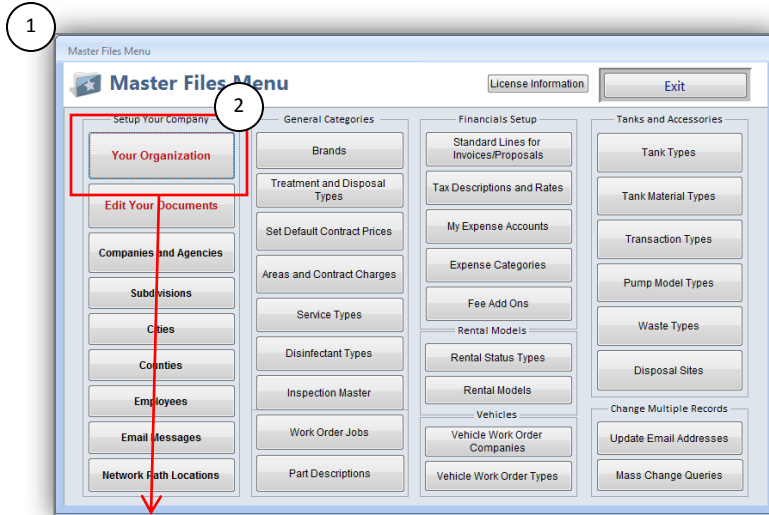
Utilities and Options Master Files Connect to a Network Backup Data Employees Switch Users (Login) Switch Names

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



# Main Menu – Master Files Tab



## YOUR ORGANIZATION MENU

Your Information

### Your Organization Information

Contact Us      SAVE/EXIT

**Your Information**

Owner: Jon Smith  
 Address: P.O. Box 557  
 City: Delton  
 State: TX  
 Zip: 75895  
 Click here to change your Organization Name or Type

**Contact Info**

Phone: (800) 216-5465  
 Fax: (800) 524-6546  
 Email: circlej5aerobic@gmail.com  
 Website:

**Document Setup**

Heading Alignment:  Left  Center  Right  None  
 Font Size: Company Name: 16, Line1 Address: 18, Line2 Address: 18  
 Color:  Black  Red  Blue  Green

**GPS Defaults**

Latitude: N 0 Longitude: W 0

**Linked Files**

Logo Location:  Browse  
 Logo Alignment: 5" From the left (3.4 Centered)  
 Linked Files:  Browse  
 \* Files you want to link to your customers  
 Alarm Location: C:\LOGGER  Browse  
 \* Location of Alarm File to Import

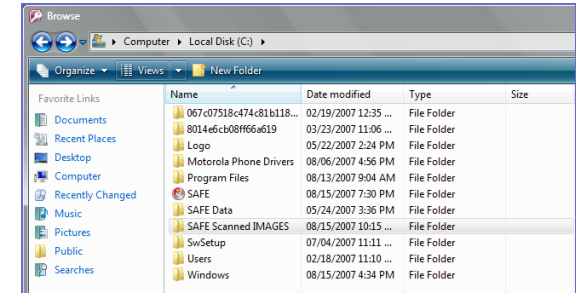
**Service Re-Scheduling Setup**

Last Scheduled Date\*  
 Last Actual Date Tested  
 Contract Start Date  
 \* The first option is used by most service companies for re-scheduling their inspections on customer systems.

**Financial Defaults**

1 Invoices Per Page  
 Invoice Message: THANK YOU FOR YOUR BUSINESS  
 Credit Card Password: \*\*\*\*\*

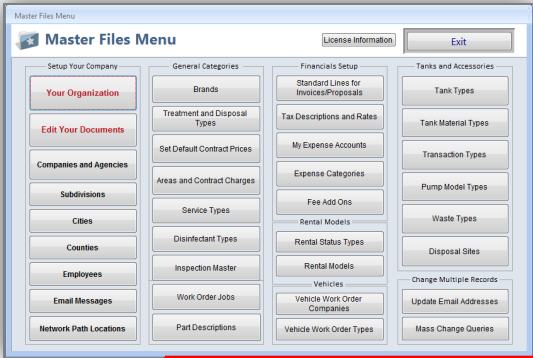
1. The **MASTER FILES** is the “Filing Cabinet” of your SAFE™ Program. Enter all of your commonly used data into these screens.
2. **YOUR ORGANIZATION:** Information about your company
  - Enter your company and personal information here.
  - Setup scheduling options, Heading, font sizes, and Colors. This will help your documents look perfect.
  - Enter Defaults for your...
    - ✓ **LOGO Setup:** Click the Company Logo “Location” field and find your folder that **you previously** setup that contains the logo. WE DO NOT CREATE OR SETUP YOUR LOGO – CONSULT A GRAPHIC ARTIST FOR PROFESSIONAL HELP. Click on the file (called “Logo.jpg” or something similar). Now you are linked.
    - ✓ **Scanned Documents Setup:** Click the Scanned Documents field and find your folder that **you previously** setup that contains the scanned images or digital photos for your customers. Click “Save” and now you are linked. DO NOT CLICK ON A SUBFOLDER FOR A PARTICULAR “ID”. You do not want to link the master location to the subfolder due to the fact that it will not work! Here is an example:



Click on the folder named “SAFE Scanned Images”, then click “OK”. The location should appear in the “Scanned Documents” field.

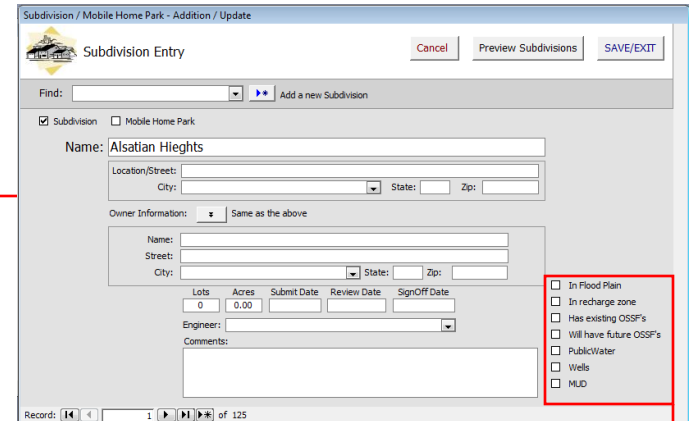
- GPS Defaults: Enter the default Latitude and Longitude for your area.
- Invoices per Page: Enter the desired default invoices per page. If you choose 1 per page, you will still be given the ability to print out 2 per page on the invoice menu.
- Invoice Message: Enter the default invoice message that will go on ALL Invoices.

# Main Menu – Edit Your Documents

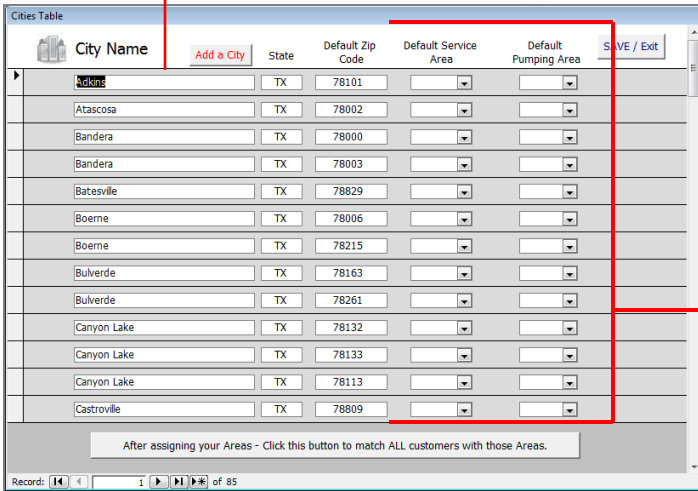


**1. Subdivisions:** Enter your Subdivisions or Mobile home park information here.

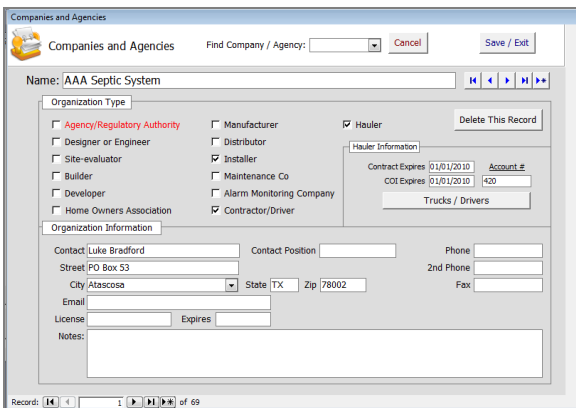
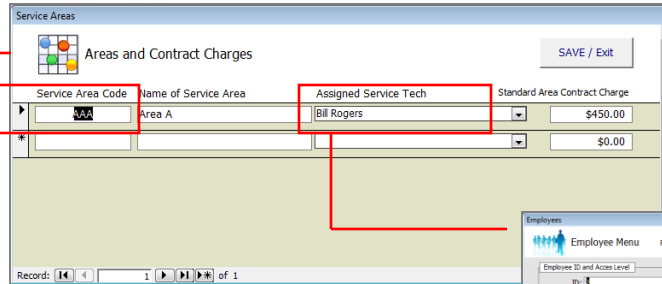
**2. Cities:** Enter all the cities. Enter a default zip code for the city and the area that this city falls into. If you have not created any areas, go to that menu first.



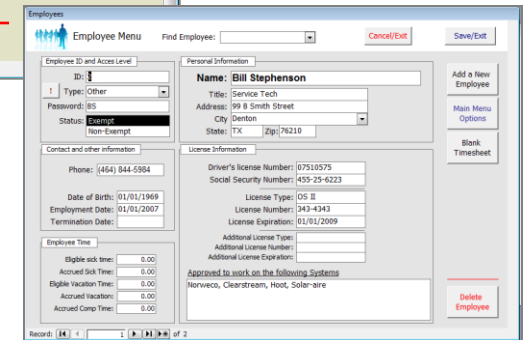
Check all that apply



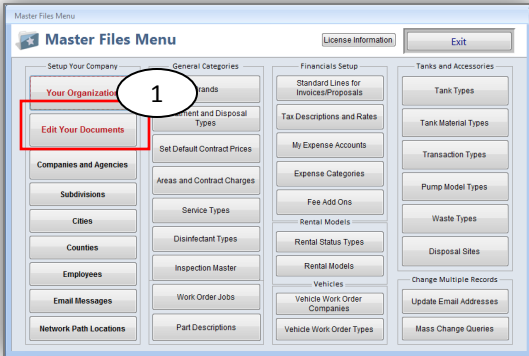
**3. Areas and Contract Charges:** Create areas for your service technicians so that they can focus their scheduled inspections, work orders, and pump-outs into groups which in turn will reduce driving and fuel costs.



**4. Companies and Agencies:** Enter all of the companies and Regulatory Authorities that your company deals with.

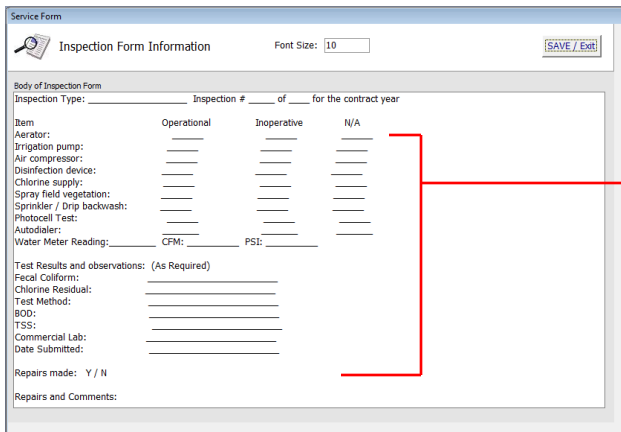
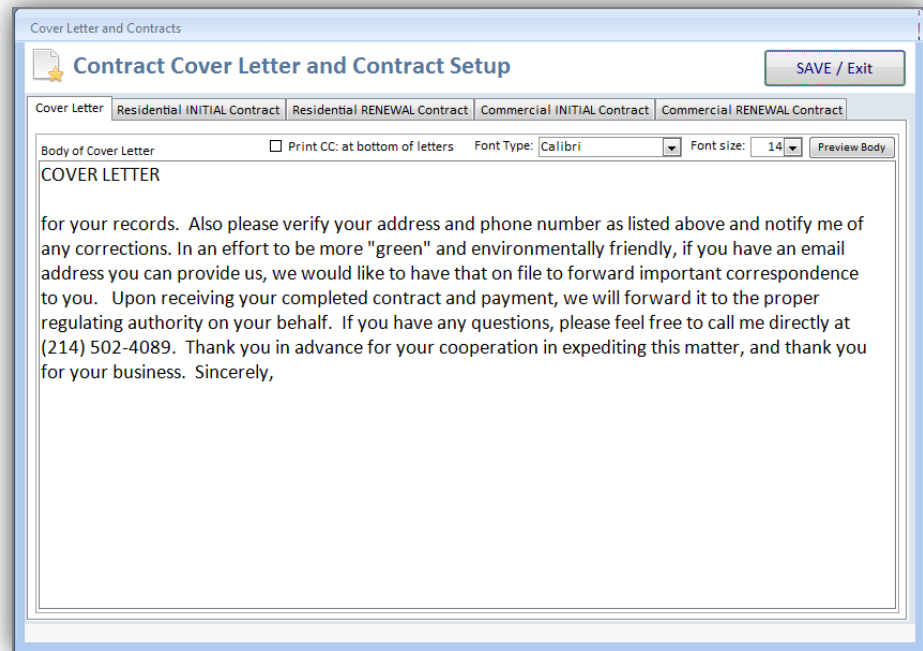
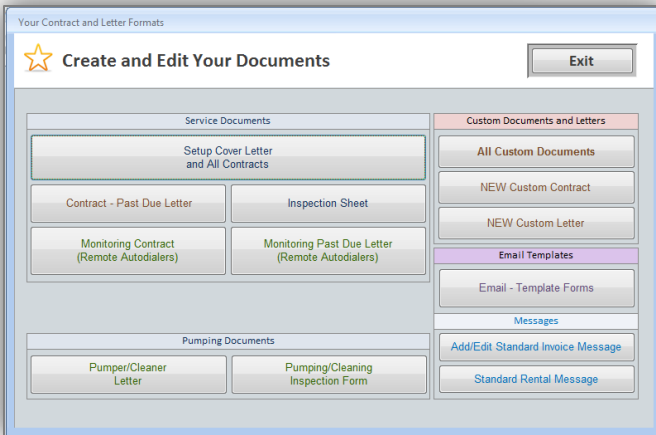


# Main Menu – Edit Your Documents



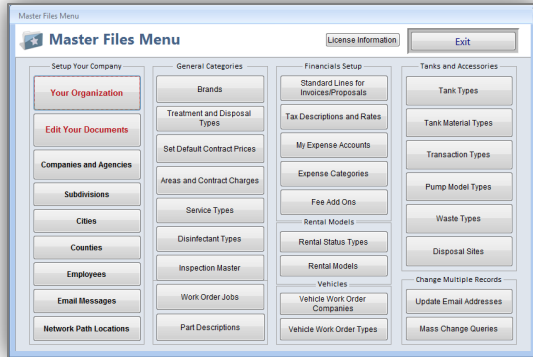
1. **Edit Your Documents:** This menu will allow you to edit certain documents and forms. Microsoft is very limited in its document versatility, so you can only change the wording and font size. This is NOT a programming issue in SAFE, it is simply a limitation with Microsoft Access.

- Letters
  - ✓ Most documents have a “template” example already in the body field. This will give you an idea of how to set up the document. Click your cursor into the body and change words, insert specific information, or delete the body and completely enter in your desired body from scratch.
- Inspection Sheet
  - ✓ The inspection sheet is a “template” form used by the Texas Commission of Environmental Quality. This will give you an idea of how to set up the sheet. Click your cursor into the body and change words, insert specific information, or delete the body and completely enter in your desired body from scratch.

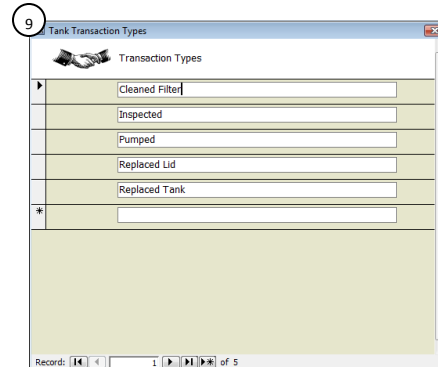
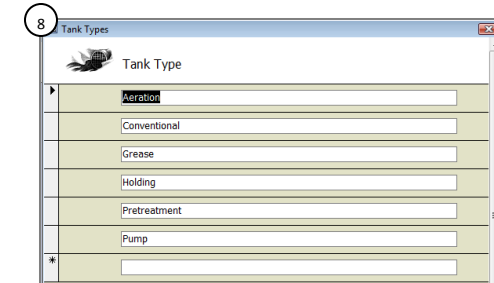
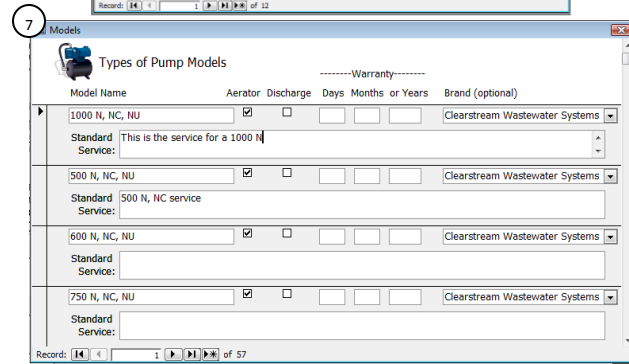
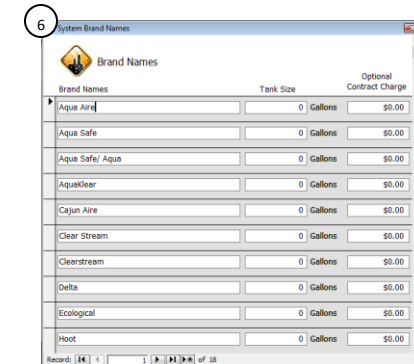
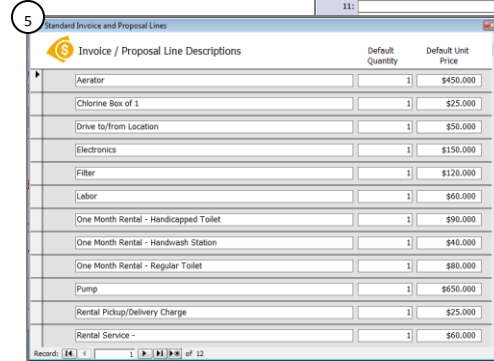
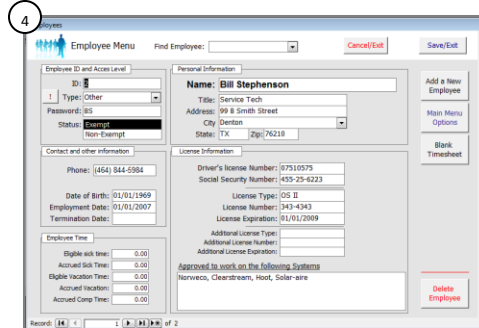
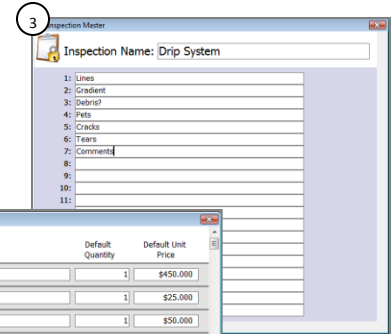
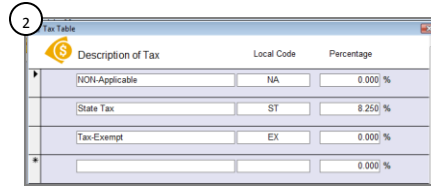
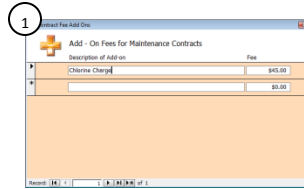


**KNOWN ISSUE:** You may notice that lines appear to be miss-aligned in many SAFE documents and inspection forms, however, when you print out the desired document, the lines are in fact aligned. This is a known issue with the Microsoft Access Memo fields and cannot be changed. THIS IS NOT A SAFE ERROR. The best suggested fix is that you simply play around with the alignment until you get the desired formatting. We are sorry for any inconvenience this may cause.

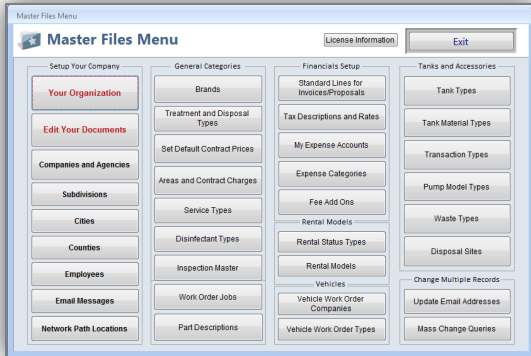
# Main Menu – Edit Your Documents



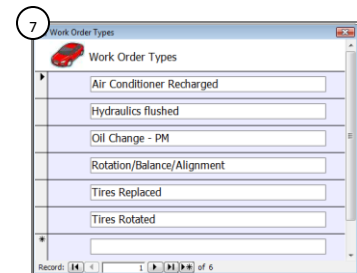
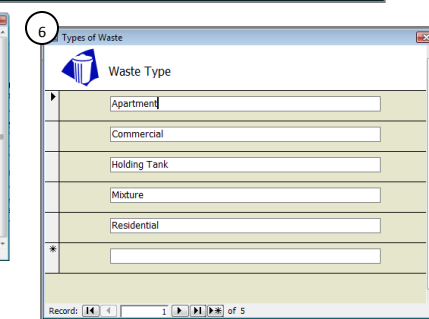
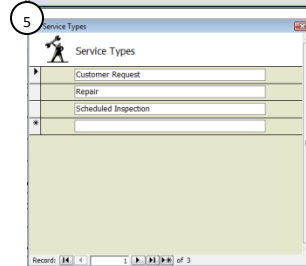
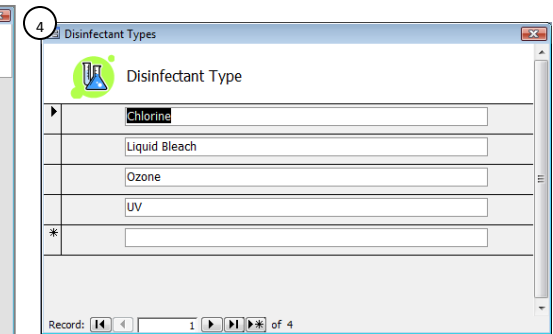
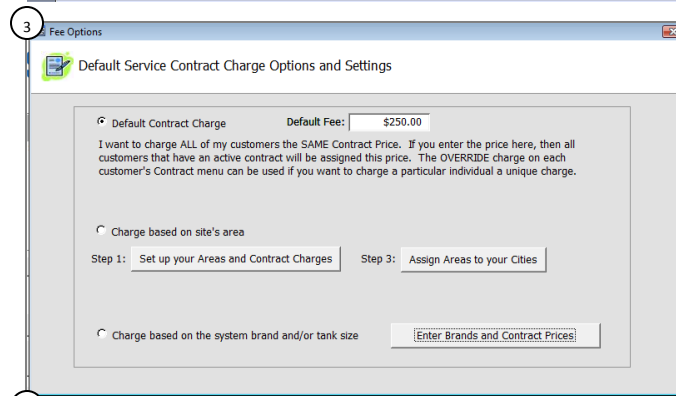
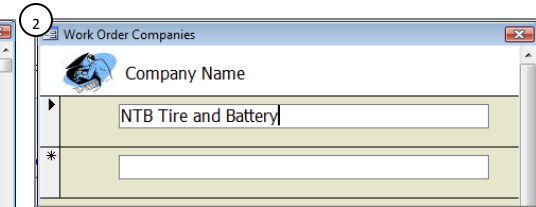
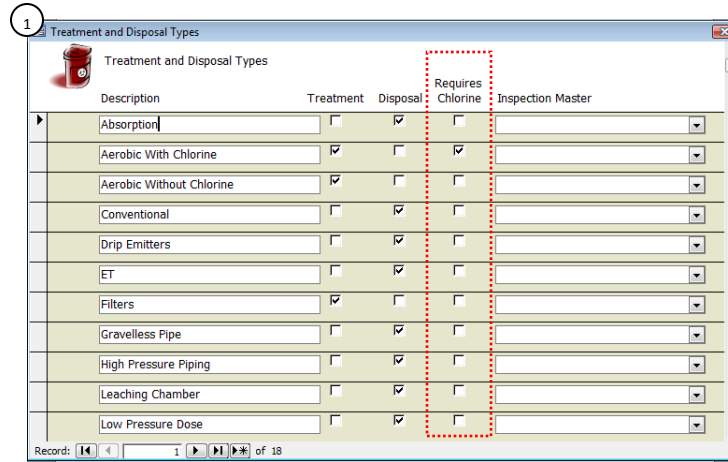
- 1. Fee Add-ons:** Enter any add-on fees that you may want to select for your service contract customers
- 2. Taxes:** Enter your default tax descriptions and values
- 3. Inspection Master:** Add different types of Inspection for your unique inspection record taking process. You can create new types of inspection sheets for your different systems.
- 4. Employees:** Enter all of your employee information, establish ID's, Types, and Passwords for security. You can also choose a default main menu and options for each employee.
- 5. Standard Lines for Invoices/Proposals:** Enter the standard charges or proposed charges, quantity, and amount in this table. You will be able to select from these standard lines later on your invoices and proposals.
- 6. Brands:** Enter your brand types.
- 7. Pump Models:** Enter your types of Septic System Pump Models.
- 8. Tank Types:** Enter your tank types.
- 9. Tank Transactions:** Enter the types of tank transactions.



# Main Menu – Edit Your Documents



- 1. Treatment/Disposal Types:** Enter your types of Treatment or Disposal Types that you service. Make sure you check the Chlorine Required box for those systems that need chlorine.
- 2. Vehicle Work Order:** Enter Work Order Companies that you use for your vehicles.
- 3. Set Default Contract Prices:** Choose the type of contract price option you wish to use for your septic service customers.
- 4. Disinfectant Types:** Enter all of your Disinfectant Types.
- 5. Service Types:** Enter all of the types of Service that you perform.
- 6. Waste Types:** Enter all of your types of Waste that you pump.
- 7. Vehicle Work Order Types:** Enter all of the types of Work Orders that your vehicles will need.





T H E E N D