



INSTRUCTION MANUAL

EMAILING INSPECTIONS TO AN AGENCY

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: ?
Last Name: ?
Email To: ?
Map: ?

Customer Listings Customer Quickviews Miscellaneous Reports
Company Listings Customer Counts Customers to Contact

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



Emailing (Transferring) Inspection Results



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Customers Work Orders Financials Reminders Organizing Summaries

Overview Septic Contracts **Septic Inspections** Pumping Rentals Remote Alarms Vehicles Spreadsheets

Upcoming Inspection Residential: 8 Commercial: 0

Inspections Due Quick Lists Between: 07/01/2011 and: 07/31/2011

Sorted by Subdivision Sorted by City Sorted by Area Sorted by County Sorted by Agency

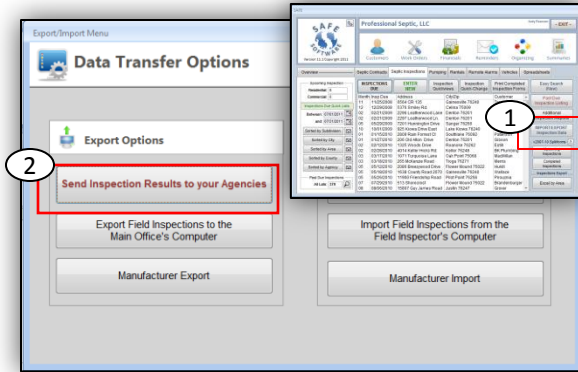
Past Due Inspections All Late: 379

Month	Insp Due	Address	City/Zip	Customer
11	11/25/2008	6564 CR 135	Gainesville 76240	Trammell
12	12/29/2008	5376 Smiley Rd.	Celina 75009	McCarty
02	02/21/2009	2296 Leatherwood Lane	Denton 76201	Tunnel
02	02/21/2009	2297 Leatherwood Ln.	Denton 76201	Tunnel
05	05/29/2009	7201 Hunnington Drive	Sanger 76266	Polk
10	10/01/2009	925 Kiowa Drive East	Lake Kiowa 76240	Negus
01	01/15/2010	2809 Rain Forrest Ct	Southlake 76092	Patterson
01	01/27/2010	206 Old Alton Drive	Denton 76201	Gibson
02	02/12/2010	1325 Woods Drive	Roanoke 76262	Estill
02	02/28/2010	4014 Keller Hicks Rd.	Keller 76248	BK Plumbing
03	03/17/2010	1071 Turquoise Lane	Oak Point 75068	MacMillan
03	03/18/2010	265 McKenzie Road	Tioga 76271	Merris
05	05/12/2010	2086 Breezywood Drive	Flower Mound 75022	Hukill
05	05/18/2010	1638 County Road 2070	Gainesville 76240	Wallace
05	05/26/2010	11900 Friendship Road	Pilot Point 76258	Pirouznia
07	07/29/2010	513 Shorecrest	Flower Mound 75022	Brandenburger
08	08/06/2010	15807 Guy James Road	Justin 76247	Grover

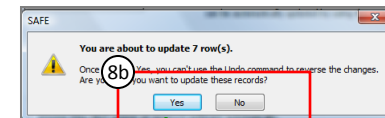
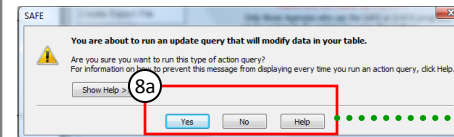
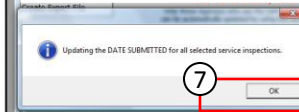
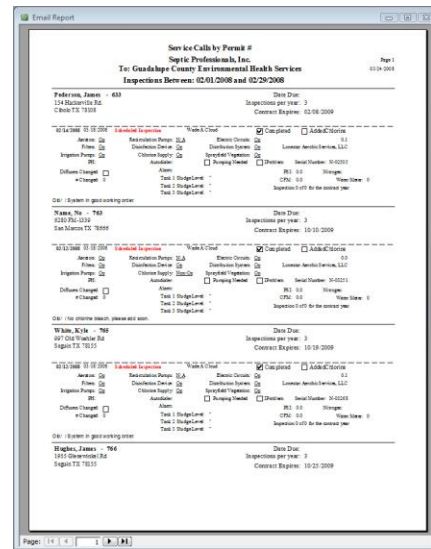
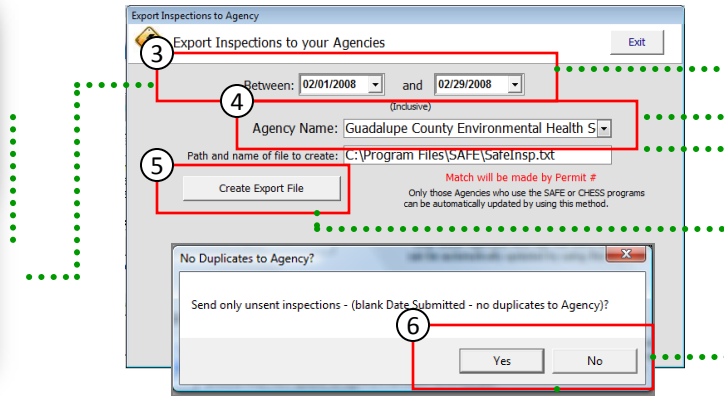
INSPECTIONS DUE ENTER NEW Inspection Quickviews Inspection Quick-Change Print Completed Inspection Forms Easy Search (New) Past Due Inspection Listing Additional Inspection Reports **IMPORT/EXPORT Inspection Data** v2007-10 Spillforms ? Upcoming Inspections Completed Inspections Inspections Export Excel by Area

Transferring inspection results to your local REGULATORY AUTHORITY*

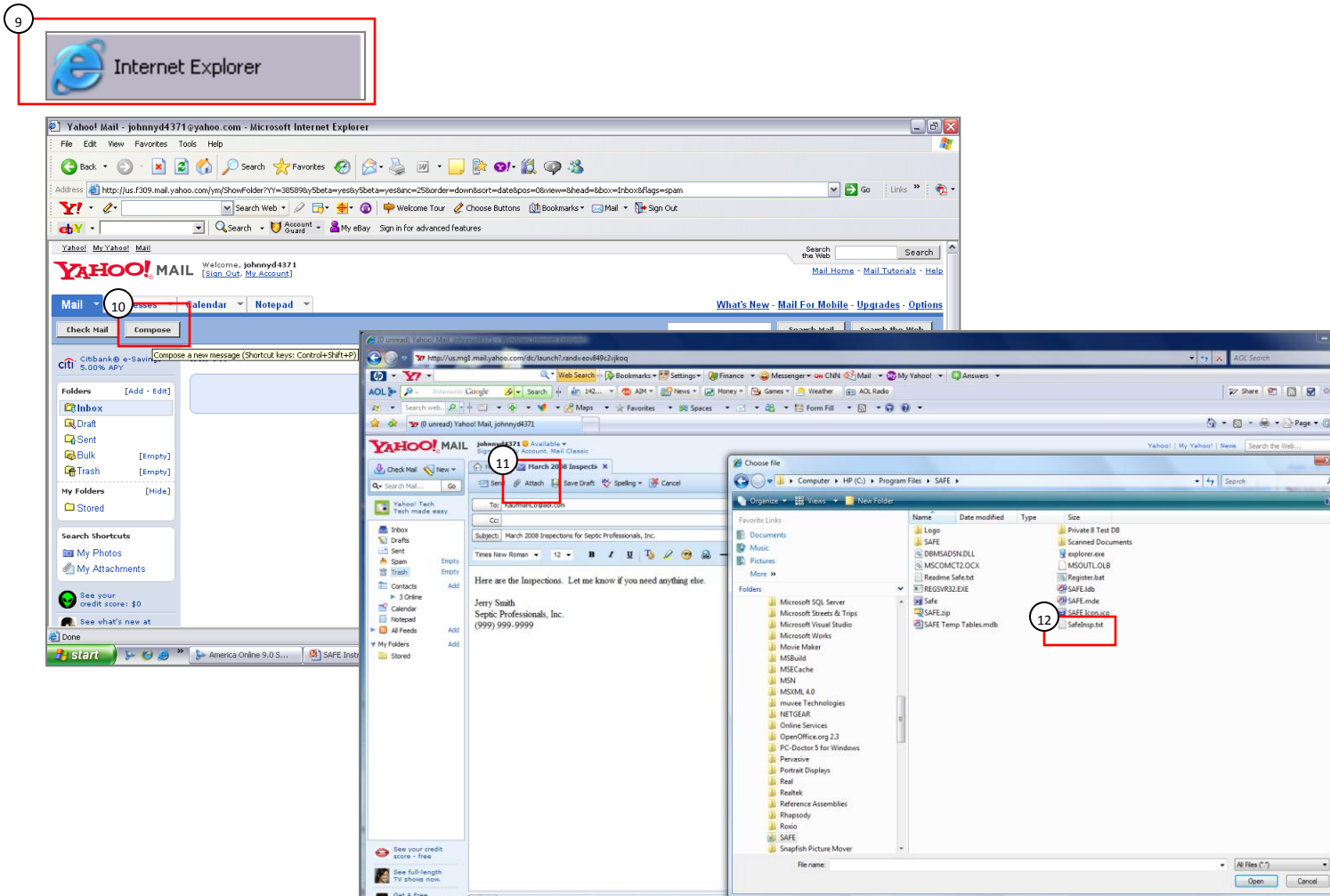
* Attention: The Agency MUST be using the Agency version of SAFE™ to IMPORT your inspections successfully



1. After entering all of your inspections, click on the Inspections Tab / Import-Export Inspection Data Button
2. Click on "Send Inspection Results to Regulatory Authorities using SAFE"
3. Select your Date Range
4. Select the Agency that you wish to send the inspections to. *Make sure that each customer has been assigned an Agency! If they have not been given an Agency, their inspection will not be included.*
5. Click "Create Export File". *The file will be created and saved to the C:\Program Files\SAFE folder and will be called "SAFEInsp.txt". This is a text file and is very small in size for fast and easy upload.*
6. Either click "Yes" or "No" to the question about sending only "Unsent Inspections". If you answer "Yes", then only inspections that have not been checked as "Emailed" will be selected. If you answer "No", then all inspections for that agency during the time period you have selected will be included.
7. Answer "OK" to run the update that will flag all the inspections as being "Emailed to the Agency" on their Inspection screen.
8. (a) Click "Yes", then "Yes" if you want to complete the update or (b) "NO" if you don't want to flag these inspections.

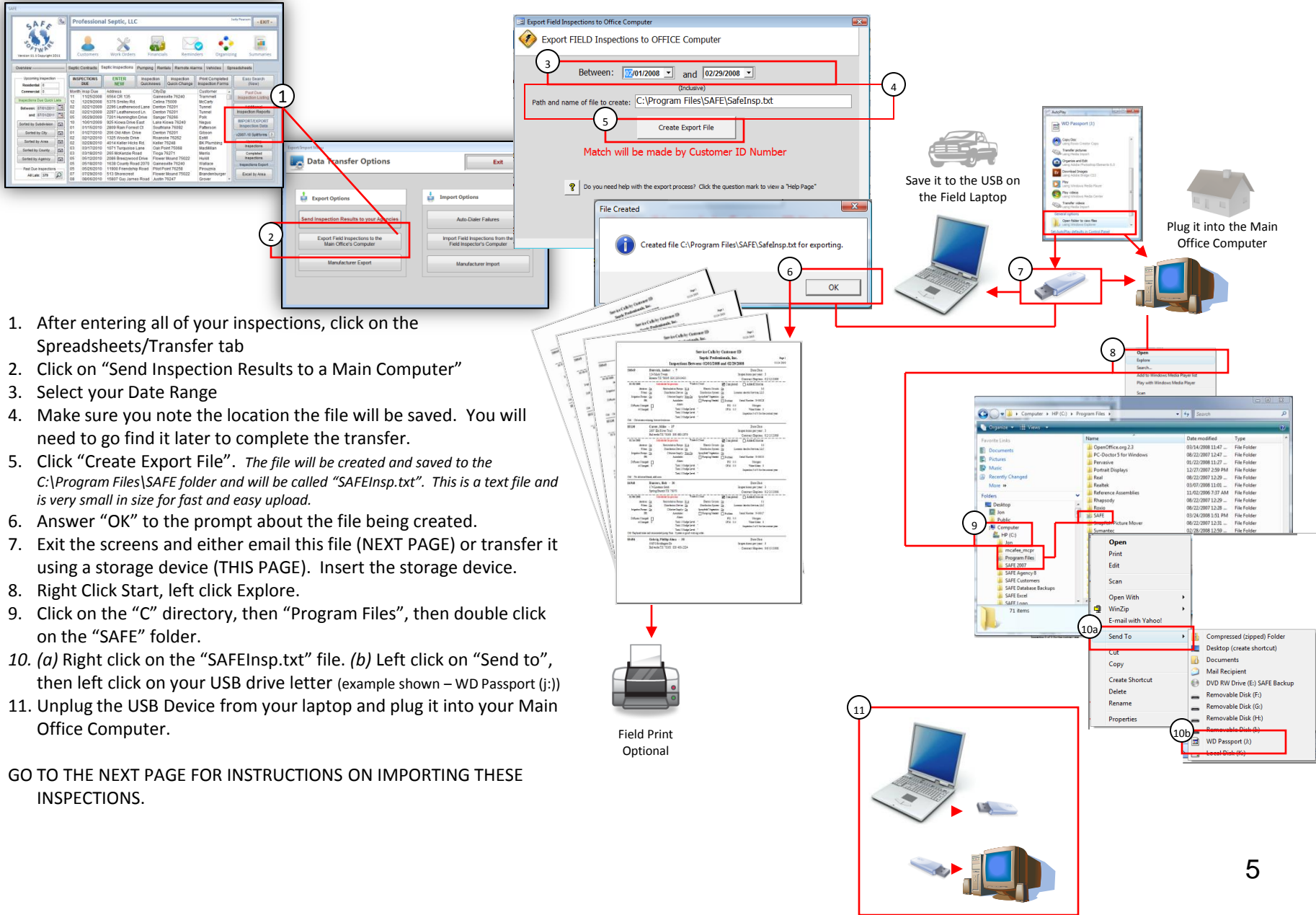


Main Menu – Exporting Inspection Emails to your COUNTY/AGENCY (Continued)



9. Start up your Internet Browser (Example: Yahoo, AOL, MSN, or whatever service you use to email)
10. Compose (Write, Create) an email to the person responsible for importing your inspection results.
11. Attach a file by clicking on the appropriate box on your email message. Many email systems are different and use different wording.
12. Attach the “SAFEInsp.txt” File and then send it. Make sure the file shows to be “attached” before you send it. Also, make sure you write an appropriate message to the person receiving the email so they will know who is sending it.

Transferring inspection results to your MAIN OFFICE COMPUTER



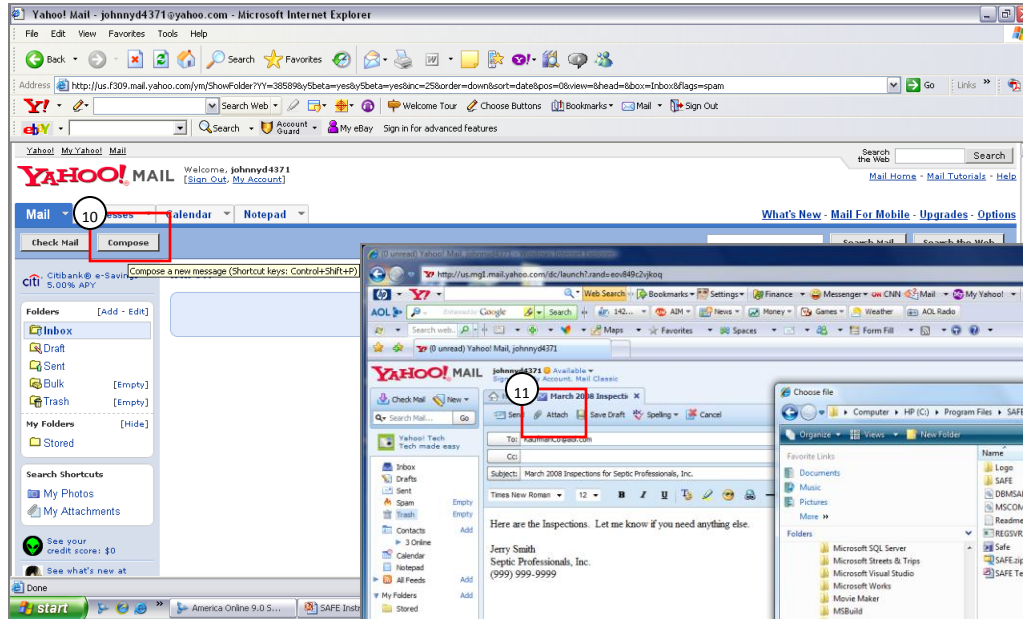
1. After entering all of your inspections, click on the Spreadsheets/Transfer tab
2. Click on "Send Inspection Results to a Main Computer"
3. Select your Date Range
4. Make sure you note the location the file will be saved. You will need to go find it later to complete the transfer.
5. Click "Create Export File". *The file will be created and saved to the C:\Program Files\SAFE folder and will be called "SAFEInsp.txt". This is a text file and is very small in size for fast and easy upload.*
6. Answer "OK" to the prompt about the file being created.
7. Exit the screens and either email this file (NEXT PAGE) or transfer it using a storage device (THIS PAGE). Insert the storage device.
8. Right Click Start, left click Explore.
9. Click on the "C" directory, then "Program Files", then double click on the "SAFE" folder.
10. (a) Right click on the "SAFEInsp.txt" file. (b) Left click on "Send to", then left click on your USB drive letter (example shown – WD Passport (j:))
11. Unplug the USB Device from your laptop and plug it into your Main Office Computer.

GO TO THE NEXT PAGE FOR INSTRUCTIONS ON IMPORTING THESE INSPECTIONS.

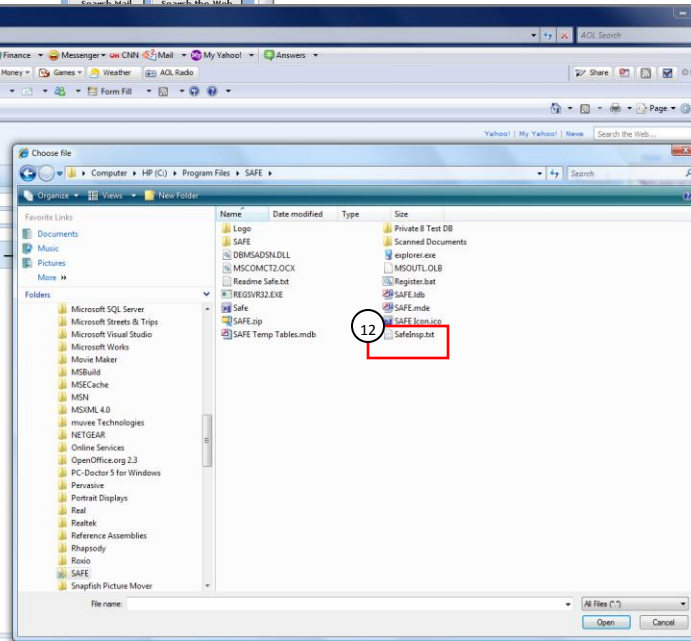
Exporting Inspections through EMAIL

9

Internet Explorer



1. After entering all of your inspections, click on the Spreadsheets/Transfer tab
2. Click on "Send Inspection Results to a Main Computer"
3. Select your Date Range
4. Make sure you note the location the file will be saved. You will need to go find it later to complete the transfer.
5. Click "Create Export File". *The file will be created and saved to the C:\Program Files\SAFE folder and will be called "SAFEInsp.txt". This is a text file and is very small in size for fast and easy upload.*
6. Answer "OK" to the prompt about the file being created.
7. Exit the screens and email this file.



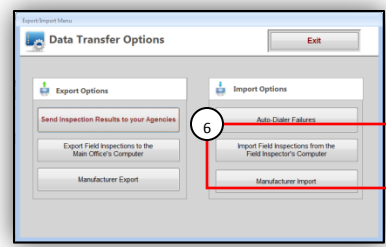
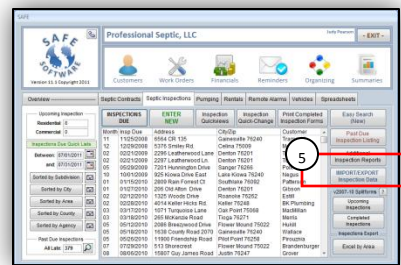
8. Start up your Internet Browser (Example: Yahoo, AOL, MSN, or whatever service you use to email)
9. Compose (Write, Create) an email to the person responsible for importing your inspection results.
10. Attach the "SAFEInsp.txt" file by clicking on the appropriate box on your email message. Many email systems are different and use different wording.
11. Browse for the file in the "C:\Program Files\SAFE" folder and attach the "SAFEInsp.txt" by double clicking on it. After doing this, simply "Send" it from your email. Make sure the file shows to be "attached" before you send it. Also, make sure you write an appropriate message to the person receiving the email so they will know who is sending it.

IMPORTING the Field Inspections to your MAIN OFFICE COMPUTER



Manual Import

1. Insert the USB Storage Device into the MAIN OFFICE Computer
2. (a) Open the contents of the folder and (b) right click on the "SAFEInsp.txt" file, (c) and left click on "Copy".
3. (a) Right click "Start" then left click "Explore", (b) left click your "C:" directory, (c) and left click on "Program Files".
4. (Paste)



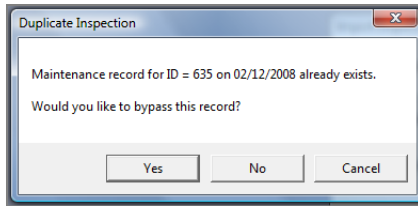
Options

1 Customer per Page

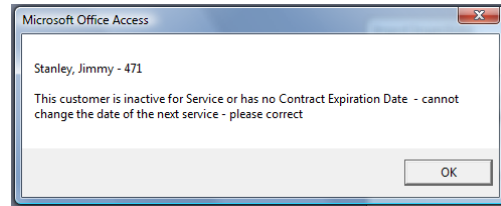
All Customers Listed together

4. Open the folder called "SAFE", right click on an empty area, left click on "Paste" and then close the window menus.
5. Open SAFE and click on the Spreadsheets/Transfer Tab
6. Click on "Bring In Inspections from a field computer"
7. Click on Step 1. "Import Inspections from the above file"
8. Click "OK" to the prompt
9. Click on Step 2. "Preview Report". Either click "Yes" or "No", depending on your printing preferences. You have the option to print these documents or simply exit them when you are confident the information is correct.
10. Click on "Load Inspections to the SAFE database". Exit when finished.

Error Message 1



Error Message 2



11. ERROR MESSAGES:

- **Duplicate Inspection:** If you get a duplicate inspection message, then this means you or someone else has previously imported these inspections or the dates may overlap.
- **Inactive Contract For an imported Inspection:** This error will alert you that you have imported an inspection for a customer that has been checked as INACTIVE for their contract. The next inspection will NOT be updated or advanced. You will need to correct this manually.



T H E E N D