



January 1st, 2018

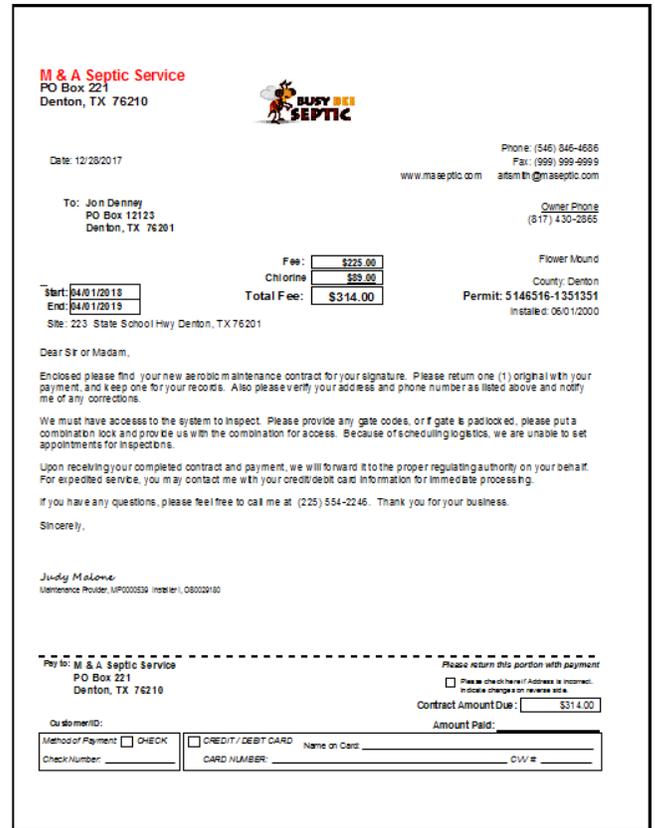
Updates for Version 18 SAFE Private Company Version

1. Got rid of all the **Alarm Monitoring IMPORTING Functionality** – Not the Alarm Monitoring Contract dates, etc.
2. Added a **DO NOT RENEW** checkbox to their Contract Tab. This will allow them to continue servicing them BUT once done, they will not be able to renew the contract.
3. Added a **“Louisiana Inspection”** on the Custom Inspections menu.
4. Added the **Custom Inspections Reports** Section in the Inspections Due.
5. Added a Report and Excel Spreadsheet Export for **DUPLICATE Customers** by **Address** and **Name** found in the Master Files Menu
6. Changed the program so the **“Date Pumped”** **does not default to today’s date**. The data enterer has to enter in a date before proceeding to another field. *Reason: Many users enter pumping transaction in arrears in bulk. The speeds up data entry.*
7. Added the **“Initial Contract”** Checkbox for those installers wanting to default the first or initial contract to **2 years**. The Renewal will still default to 12 months unless changed manually.
8. Added a Report of all Customers by **CONTRACT TYPE**. Put it in the Contract Reports Section.
9. Added:
 - a. **Invoice Summary Report** to send to customers on their Customer Menu as well as the Financials Menu (for bulk printing).
 - b. The **Invoice Summary Report by Month, Quarter, and Year**
10. **DATABASE FIELD ADDITIONS TO THE INVOICE TABLE:**
 - a. **“Interest Rate”** Field to the Invoices Database Table to store the Rate of Interest Charged on the Invoice
 - b. **“Interest Amount”** Field to the Invoices Database Table in order store the dollar amount of Interest Charged on the Invoice.
 - c. **“Interest Description”** Field to the Invoices Database Table to store the Description of the Interest Charge
11. Added the **“Interest Master Form”** in the Master Files to add default interest charges for selecting on Invoices.
12. Added the **“Past Due Invoice with Interest Charges”** datasheet to the Past Due Menu in the Financials Section. This screen allows you to view all past due invoices, see the number of days late, and go to each one directly from this screen to add or adjust the Interest applied to past due invoices.

- 13. Added an **“Alternate Invoice Listing”** for those users that implement their own Invoice Numbers. SAFE Invoice numbers are auto-numbered, so some users have decided to track their invoices with a unique number that they either create OR copy down from an Invoice Book.
- 14. Added an **“Invoices to Payments Datasheet”** that compares open Invoices to their respective Payments. This datasheet can be filtered and sorted by the user.
- 15. Added the **“Latitude”** and **“Longitude”** to the Work Orders Menu.
- 16. In the **Mapping Menu**, we added **“MAP with MapYourList”** hyperlink where you can paste a listing from the Mapping Menu to that website in order to map your customers.
- 17. Added a **“Microsoft Outlook Calendar Transfer”** for Work Orders, Inspections Due, and Completed Inspections. The user can manipulate the information in Outlook.

- 18. Added / enhanced the **“Email Marketing”** export using MS Excel. This spreadsheet is formatted for programs like Mail Chimp, Constant Contact, etc. It can be used to create a listing to add to an email marketing campaign.
- 19. **DATABASE CHANGE TO THE LETTERS TABLE:** Added the **“FIN”** or **“Financial”** option to the letters menu so that when a letter is created for the Financial Section of SAFE, the user can designate it for the Financials section. This makes it easier to select **ONLY** those letters on Financial Pop-down areas like the Statements.
- 20. Added the **Credit Card and Check Payment Options to the bottom of the INITIAL AND RENEWAL CONTRACT COVER LETTERS.** You have the option to show or not show the Credit Card information.

Example: 



M & A Septic Service
PO Box 221
Denton, TX 76210

Phone: (546) 846-4666
Fax: (999) 999-9999
www.maaseptic.com atsmth@maseptic.com

Date: 12/28/2017

To: Jon Denney
PO Box 12123
Denton, TX 76201

Owner Phone: (817) 430-2865

Fee:	\$225.00
Chlorine:	\$89.00
Total Fee:	\$314.00

Start: 04/01/2018
End: 04/01/2019

Site: 223 State School Hwy Denton, TX 76201

Flower Mound
County: Denton
Permit: S146516-1351351
Installed: 06/01/2000

Dear Sir or Madam,

Enclosed please find your new aerobic maintenance contract for your signature. Please return one (1) original with your payment, and keep one for your records. Also please verify your address and phone number as listed above and notify me of any corrections.

We must have access to the system to inspect. Please provide any gate codes, or if gate is padlocked, please put a combination lock and provide us with the combination for access. Because of scheduling logistics, we are unable to set appointments for inspections.

Upon receiving your completed contract and payment, we will forward it to the proper regulating authority on your behalf. For expedited service, you may contact me with your credit/debit card information for immediate processing.

If you have any questions, please feel free to call me at: (255) 554-2246. Thank you for your business.

Sincerely,

Judy Malone
License Provider: LP0000539 (member), 080020100

Pay to: M & A Septic Service
PO Box 221
Denton, TX 76210

Please check here if address is incorrect. Indicate changes on reverse side.

Contract Amount Due:

Amount Paid:

Customer ID:

Method of Payment: CHECK CREDIT / DEBIT CARD Name on Card:

Check Number: CARD NUMBER: CIVV #:

- 21. Added the **“DO Not Text”** checkbox to the Customer Menu. Added the **“DoNotTextBox”** field to the database. Added the **SMS (Text) Report** that transfers data for Inspections, Contracts Due, Pumpings Due, Work Orders Due, and Portable Toilet Service Due to Excel so you can import that list into a Text Marketing/Reminder Program.
- 22. Added the **“Installed Systems”** Report where you type in the date from and through. You can view this by Engineer/Designer, Installer, Manufacturer, or Distributor.

MORE TO COME...