VERSION 5.7

EULOGICA LTD

For any information, please contact
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Contents

A Introduction

A.1 Introduction to Eulogica

Eulogica is the name of a software and support concept dedicated to the Funeral Profession, offering a wide range of customisation options for the funeral business.

The most central part of the system is a daily funeral management software application. This application includes functionality for registration, archiving and searching, document and report printing, powerful integrated diary, invoicing and much more.

Technically, Eulogica is a client/server based software. This means the software comes in two parts. The central information database is maintained by a computer program which is entirely separate from the software generally seen by users. These parts may run on different computers in different locations. In practice this makes the system scalable up to installations of several hundred computers over vast geographical areas. It also makes the system sturdy – it is well prepared to handle various communications problems and the like.

The system offers options for disconnected work, that is, it is possible to work on portable computers which have no network connection at all to the main server. New information may simply be synchronised whenever there is an opportunity.

A.2 Introduction to documentation

All the illustrations in this documentation refer to how the screen could look under Windows XP with a “classical theme”. Under other Windows editions, or with other settings, the screen might look quite different, although the functionality of the software remains the same.

Please be advised that when the illustrations and examples in this documentation refer to actual funerals and deceased persons, all names and details are fictitious.

The documentation and software does refer to a selection of real world suppliers, products, churches, newspapers, charities, etc. Such details are provided as examples only, and the correctness of any particulars cannot be guaranteed. You should create your own files of contacts, products etc, according to chapter E – Contacts and chapter F – Products.

A.3 Help and support

A.3.1 Daily support

For general support with the software please use the following contact details:

E-mail: support@intelligent-software.co.uk

Telephone: 0845 351 9935 - *option 1 Technical Support (normal working hours)*

Facsimile: 0845 351 9936

A.3.2 Contact Address

For any information, please contact:

Address: Eulogica Ltd
Charles House
5 Lower Regent Street
London
SW1Y 4LR

Telephone: 0845 351 9935

Facsimile: 0845 351 9936

E-mail: enquiries@eulogica.co.uk

Internet: www.eulogica.co.uk

B Starting up

B.1 Logging into the system

In order to start the program, double-click on the Eulogica icon on your desktop .

This will lead to the Login window, which requires input of a staff code (user name) and a password.

Enter your Staff code and Password as given to you by either your company or Intelligent Software UK Ltd. Click **OK** to continue.

Incorrect entry of Staff code and/or Password will produce an error as shown below.

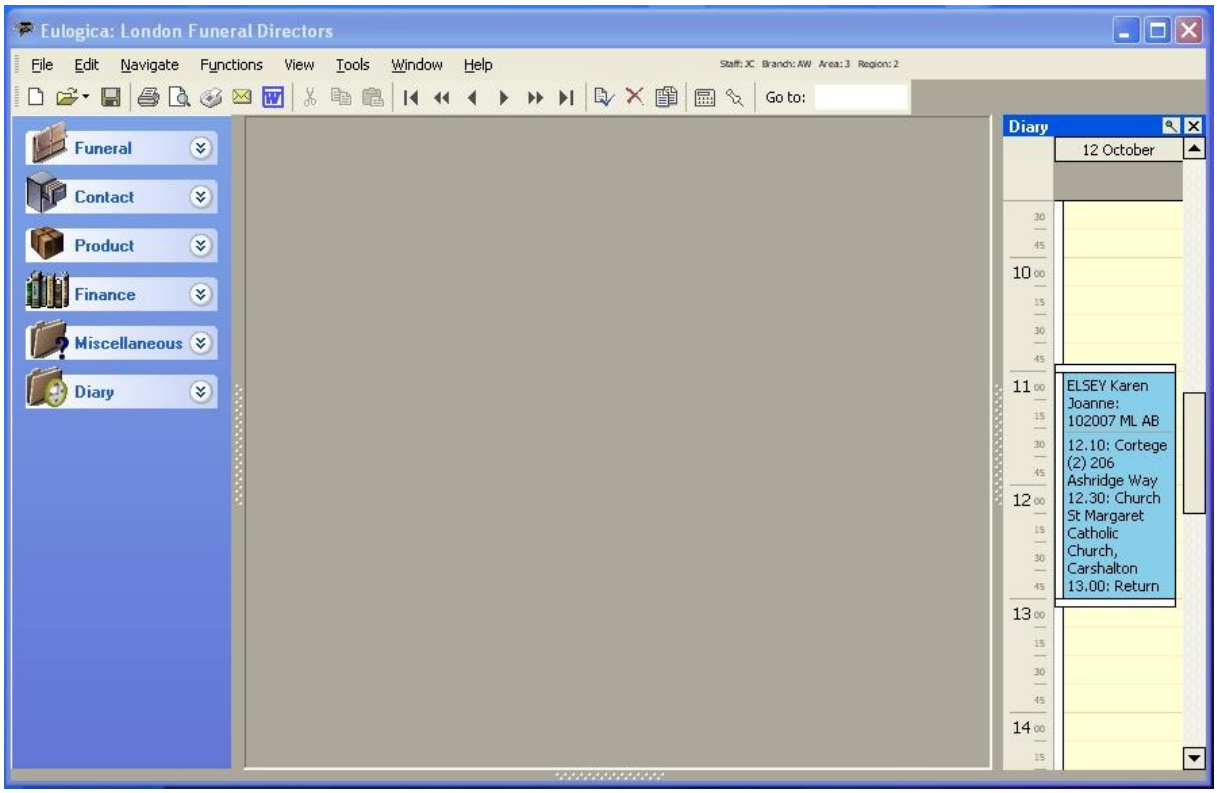
Click **OK** to continue. This will then close the Login window and you will have to start again by double clicking on the Eulogica icon as detailed earlier.

A successful provision of staff code and password will lead to the application main screen as shown in the next section.

C Screen overview

C.1 The main window

Following successful login you will be presented with the main screen as shown below.



The program may be terminated at any time by clicking the **X** in the upper right corner, or by selecting **File | Exit** in the top menu.

The entire main window can be resized to take more or less space on your physical screen. Just drag its edges as you would any other window. The application will adapt all of its functions to the available space.

On start up, the main window is made up of three sections. Across the top of the window are some standard windows buttons. For example, **File**, **Edit, Window, Help** etc. These are the same buttons as used in most Microsoft applications and have the same functions.

To the right of the **Help** button you will also see information on the user currently logged into Eulogica. This will show the **Staff** code, **Branch** code, **Area** code, **Region** code and **Brand** code. Some of these items may not be visible depending upon your particular installation.

On the left of the screen is the Eulogica **Main Menu**. This is where you can open up new or existing funerals, contact files, product files etc. This menu can be resized or closed using the dotted section in the middle of the menus right hand edge. To close the menu simply click the dotted section. It will

then close to the left just leaving the dotted section visible. To reopen the menu simply click on the dotted section again. To resize the menu, click and hold the dotted section and then drag the mouse either left or right to resize the menu.

On the right of the screen is the **Diary**. The diary functionality is looked into further in the Diary section. The diary can be resized or closed using the dotted section in the middle of the left hand edge of the diary. To close the diary simply click the dotted section. It will then close to the right just leaving the dotted section visible. To reopen the menu simply click on the dotted section again. To resize the menu, click and hold the dotted section and then drag the mouse either left or right to resize the diary.

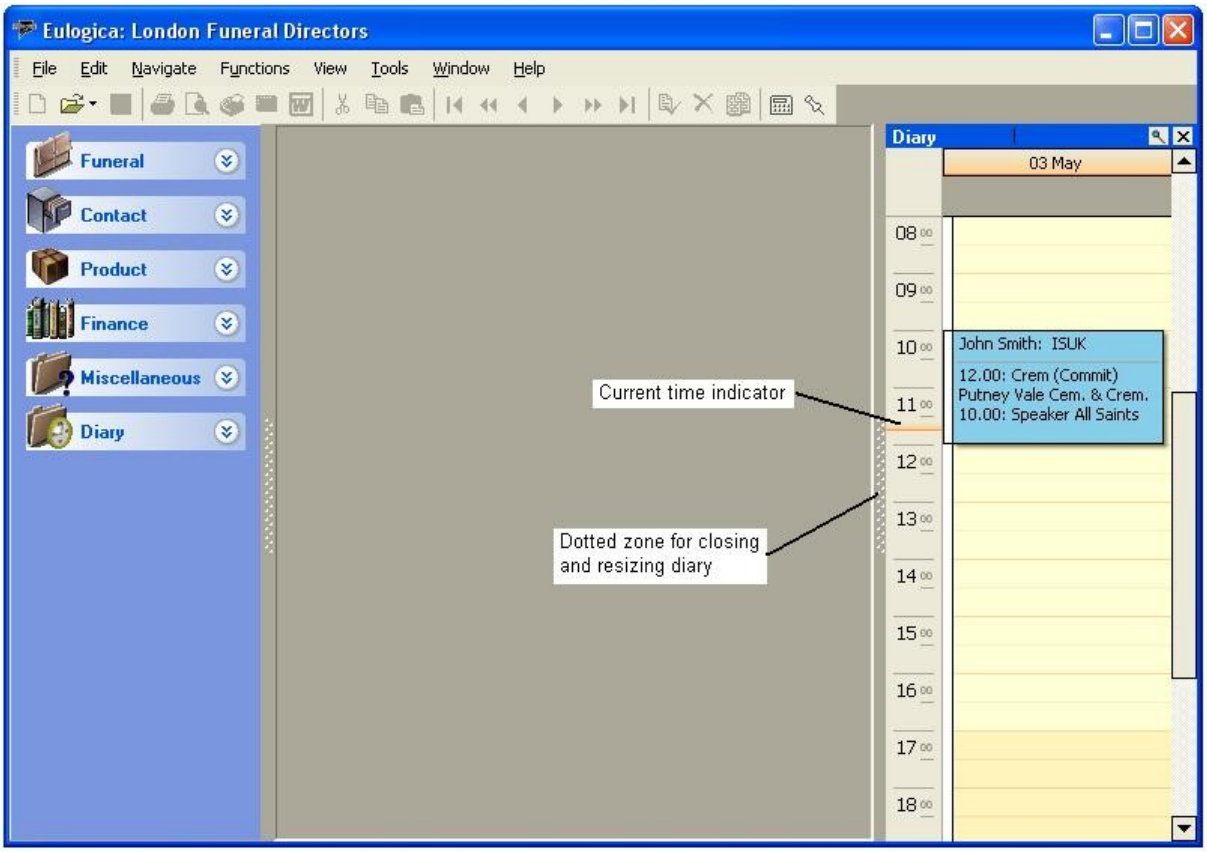
Upon opening a contact list, funeral list or any other section from the main menu, a fourth section of the screen will appear. This will appear from the bottom of the screen and will then be able to be opened, closed or resized in a similar way to the main menu and diary. The dotted section will appear in the middle of the top edge of a list as they are opened. This will be seen further on in this quick guide.

D Diary

D.1 Introduction

On start-up of the software the diary will automatically appear and show the current day along with any events that are scheduled for that day. As was mentioned in section X, the diary can be closed, opened or resized very easily using the dotted zone in the middle of the diary's left hand edge. Simply click the dotted zone to either close or open the diary and click and drag the dotted zone left or right to resize it.

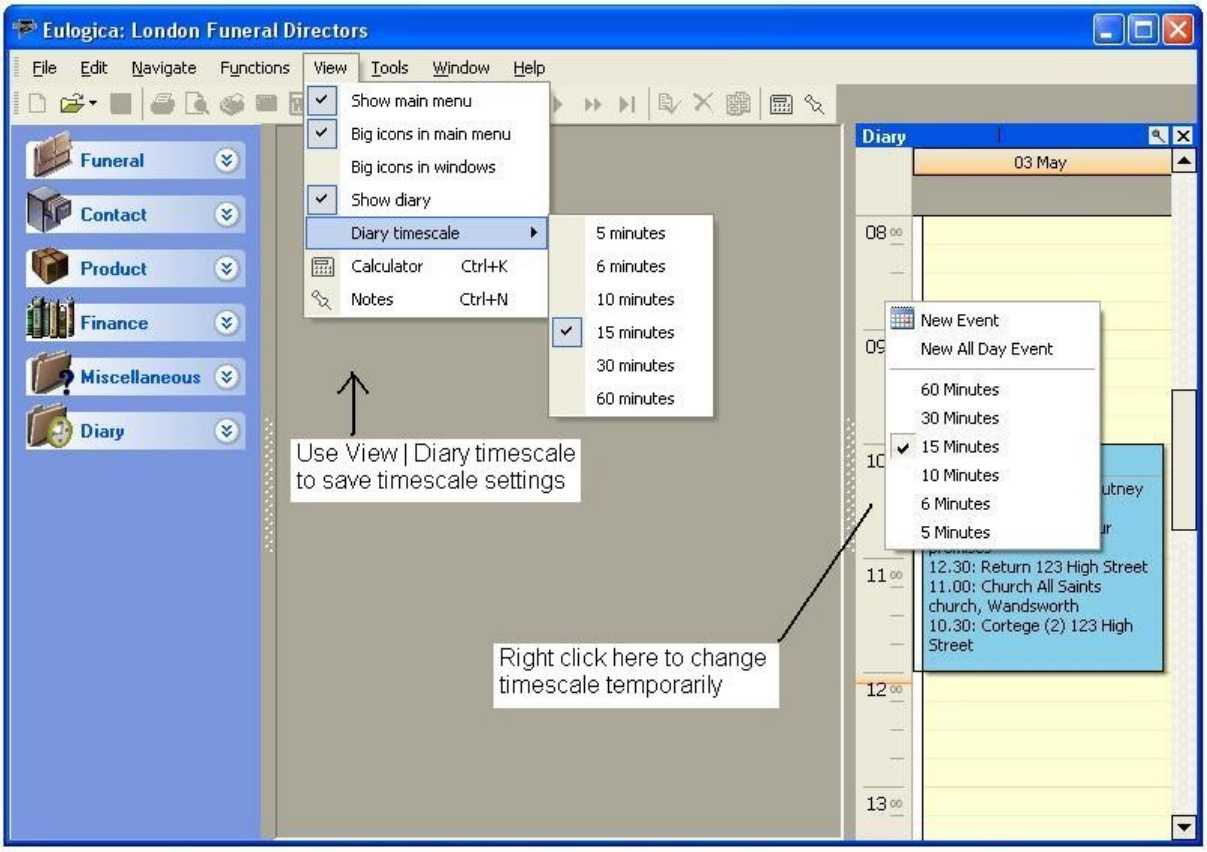
You will also notice a small orange bar on the time-scale of the diary. This shows the current time and will move down the screen as the day goes on. The current day is also highlighted in orange at the top of the screen and this will become more obvious later on when more than one day is viewed in the diary.



The time-scale of the diary can also be changed. This will then either show more of the whole day but less detail of the diary entries or vice versa. Changing the time-scale can be done in two ways.

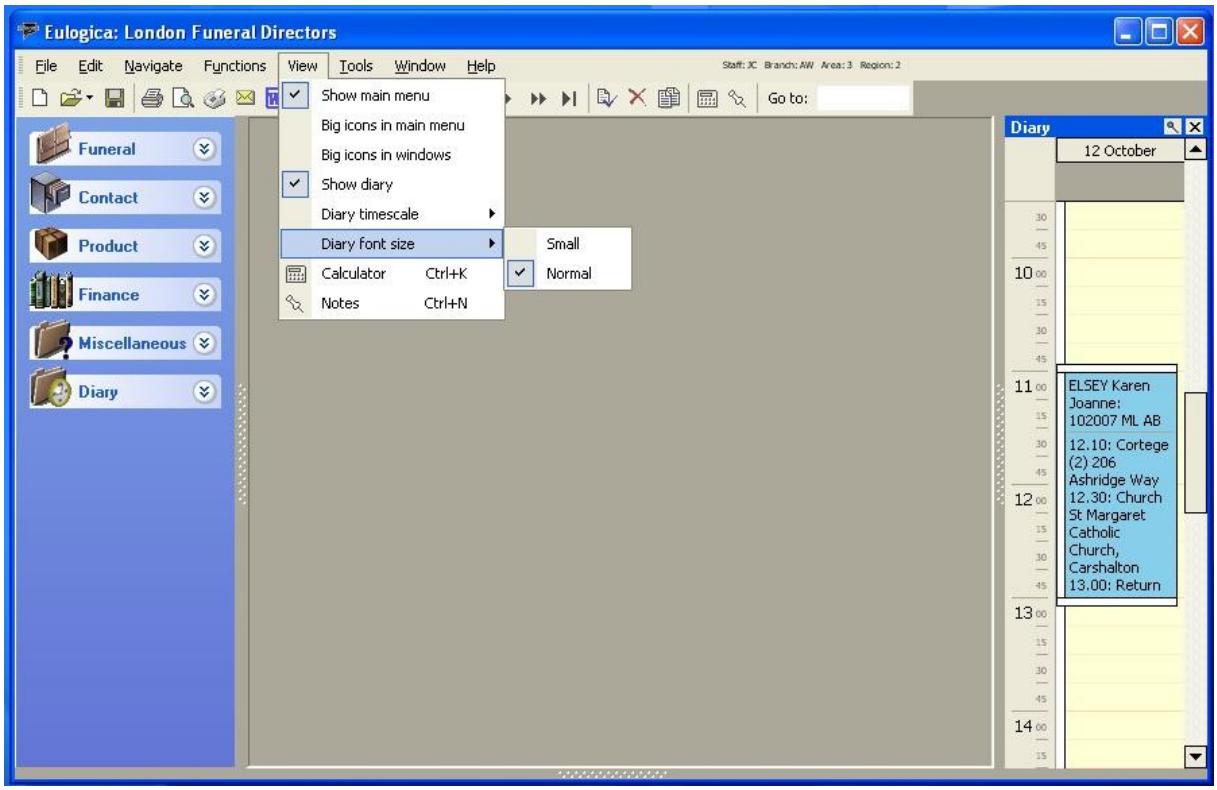
Firstly you can right click on the time line within the diary and change the time-scale setting you require. This will only change the time-scale setting temporarily and it will return to its previous setting if the diary is closed and reopened, resized or if the Eulogica programme is closed and restarted. This can be useful if you quickly want to look at the whole day but don't want to save the time-scale settings etc.

Secondly you can select **View | Diary time-scale** from the top menu and then select the time-scale you desire. Using this option saves the time-scale settings even if you close and reopen the diary or the Eulogica programme. Use this option to save your preferred settings of the time-scale



The font size used in the diary can also be changed to either **Small** or **Normal.** Obviously using the small font size allows more text to be displayed in a smaller diary box but it is much smaller to read.

Select **View | Diary font size** from the top menu and then select the size you require.



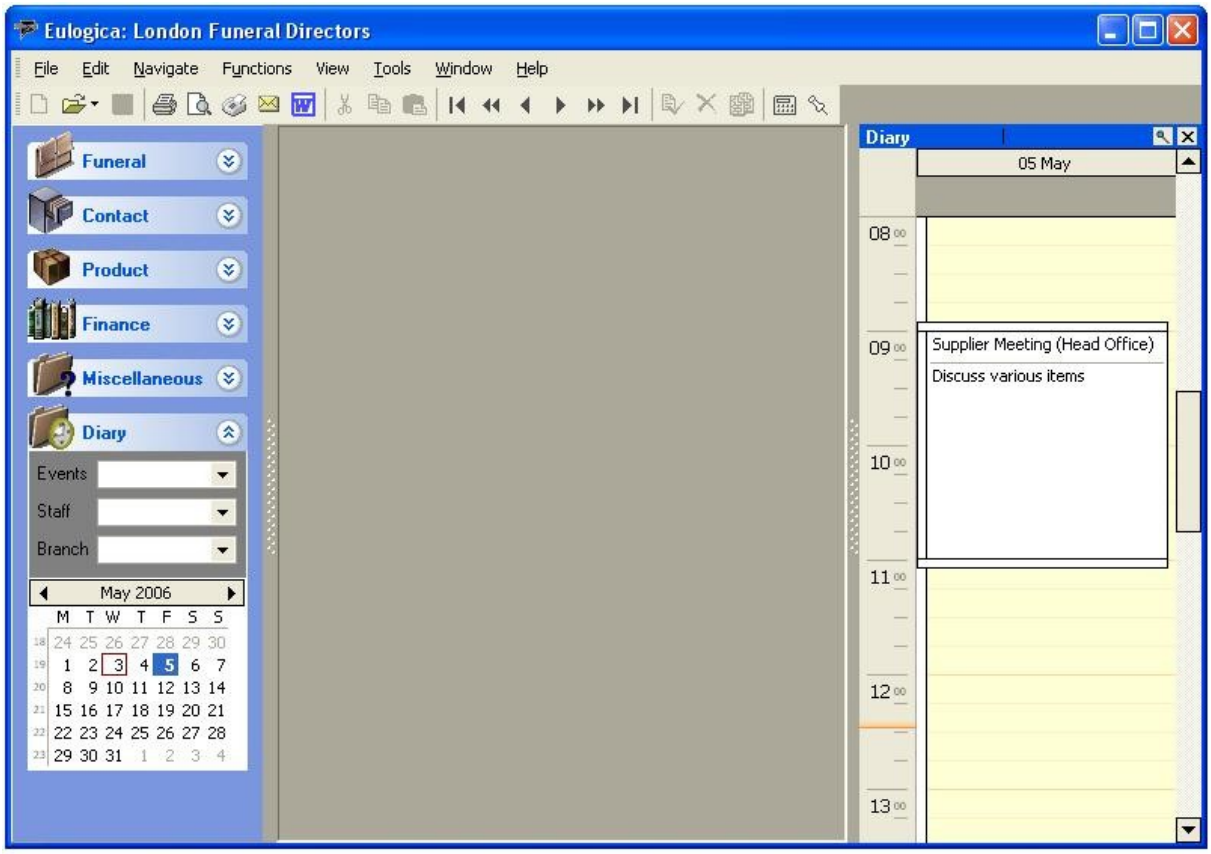
D.2 Viewing options

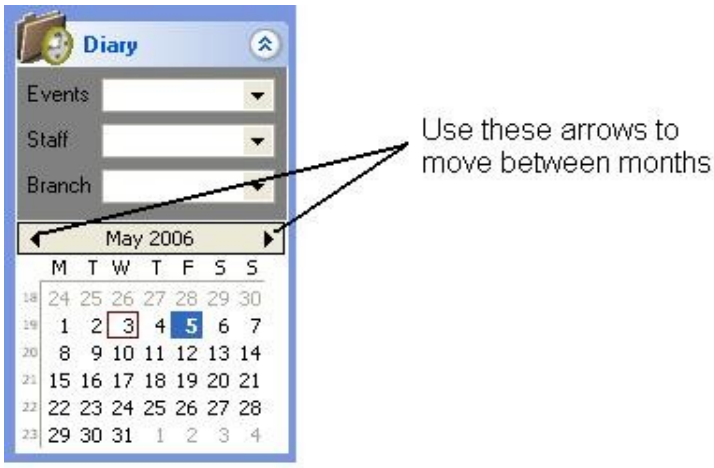
The diary can also be used to view a different day, a number of continuous days, a week, a number of weeks or indeed several none consecutive days. It can also be used to filter out certain events, branches, members of staff or a selection of them all. This is very useful when a large number of events start to populate the diary.

These options are controlled by clicking on **Diary** in the main menu. By clicking on **Diary** you will open up the diary control menu. You will then be presented with various filter options and a calendar of the current month.

D.2.1 Viewing different days

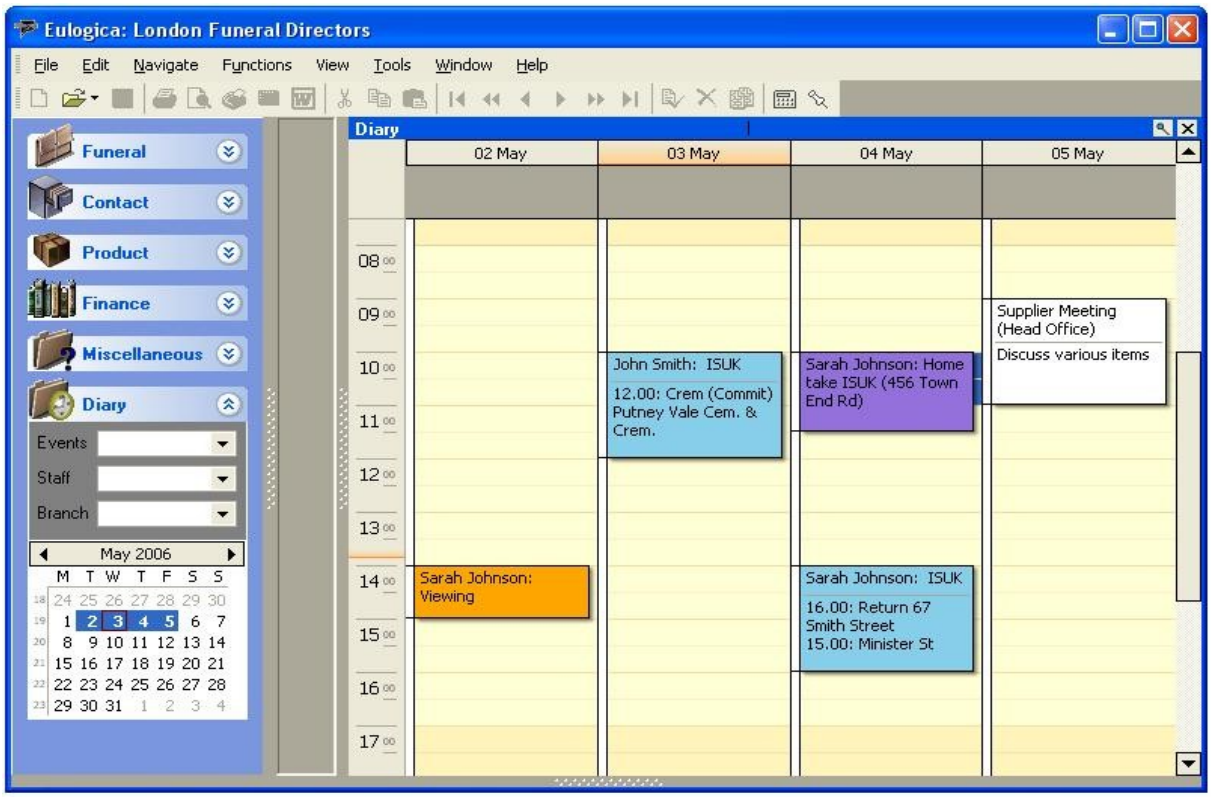
To view a different day simply open up the diary menu and, using the mouse, select the day you wish to view. If the particular day you wish to look at isn't in the current calendar month you can use the small left and right arrows on the Month / Year bar to go backwards or forwards to the previous or next month. Today's date will always be highlighted by a red square around the date.





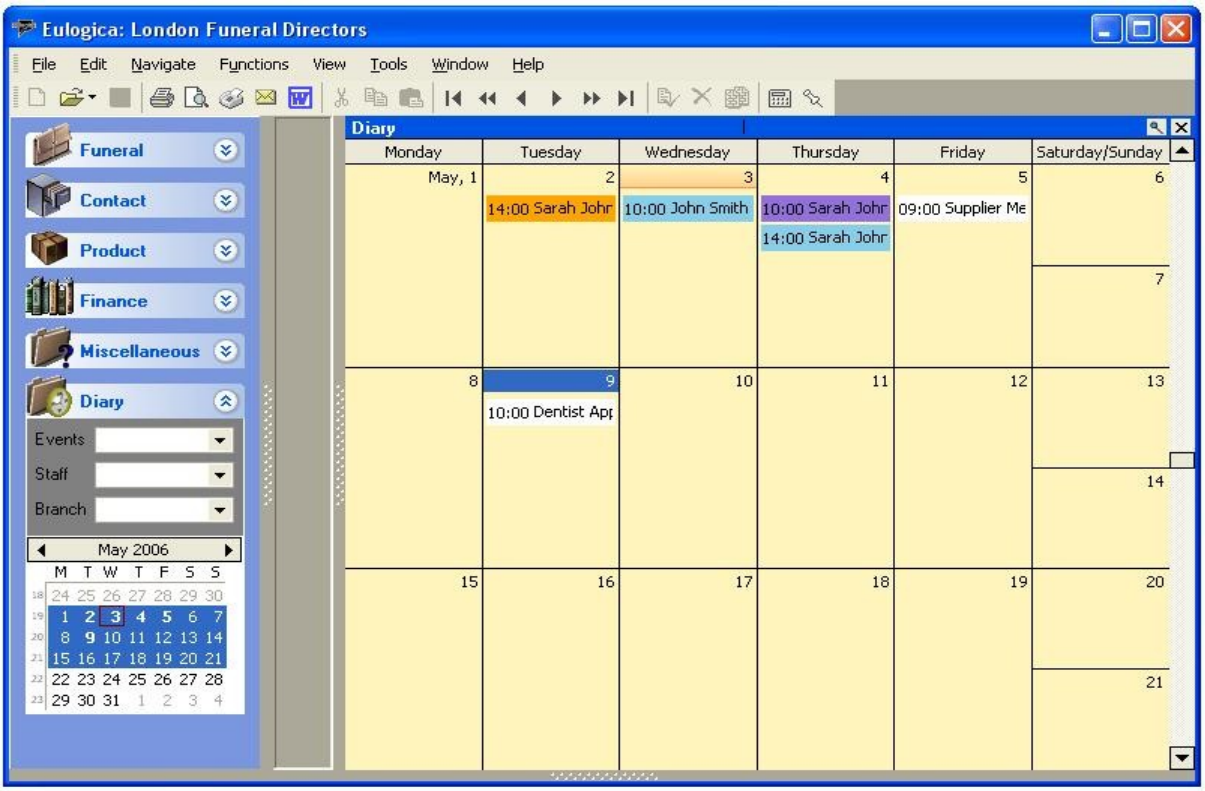
To view a number of consecutive days simply use the mouse to highlight the days required. The diary will then show the selected days. It is probably wise to resize the diary to a larger size to enable you to see the days more clearly.

The screen shot below shows 4 consecutive days highlighted.



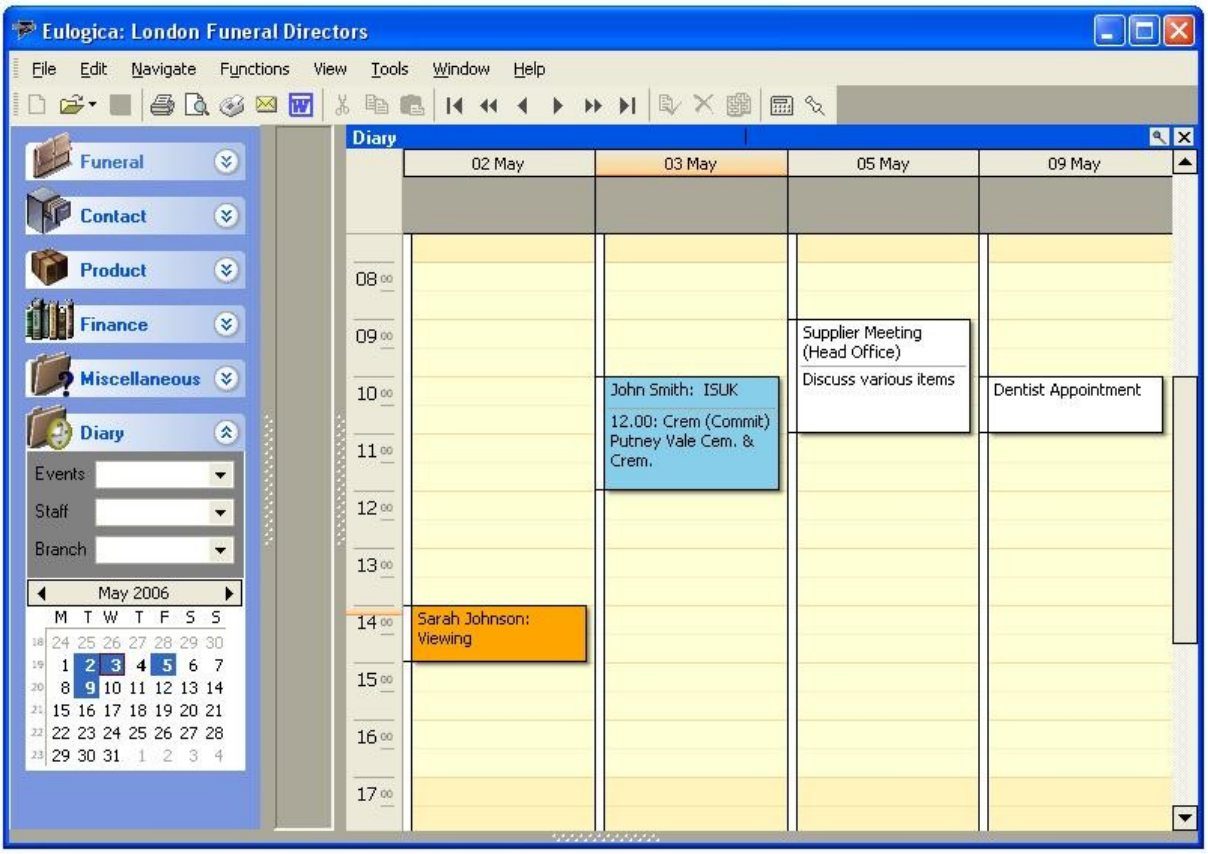
You can also select the whole week by clicking on the week number on the left hand side of the diary. Again, two or more consecutive weeks may be viewed by using the mouse to highlight the selected week numbers.

The screen shot below shows 3 consecutive weeks highlighted using the week numbers towards the left hand side of the calendar.



Separate days or weeks can also be viewed together by using the **Ctrl** key. Whilst holding down the **Ctrl** key, use the mouse to select the individual days or week numbers. As you select the days they will appear in the diary. Once you have selected the days or weeks you require simply let go of the **Ctrl** key.

The screen shot below shows various non consecutive days highlighted.



The significance of the current day being highlighted in orange at the top of the diary can now be seen.

D.2.2 Filtering the diary

As more funerals and funeral related events are added to the diary it may become difficult to see the entries you are interested in. This is where the filter option is useful. You can filter on The following options:

- **Event** – Choose certain events, for example, viewing. This will only show viewings in the diary and nothing else.

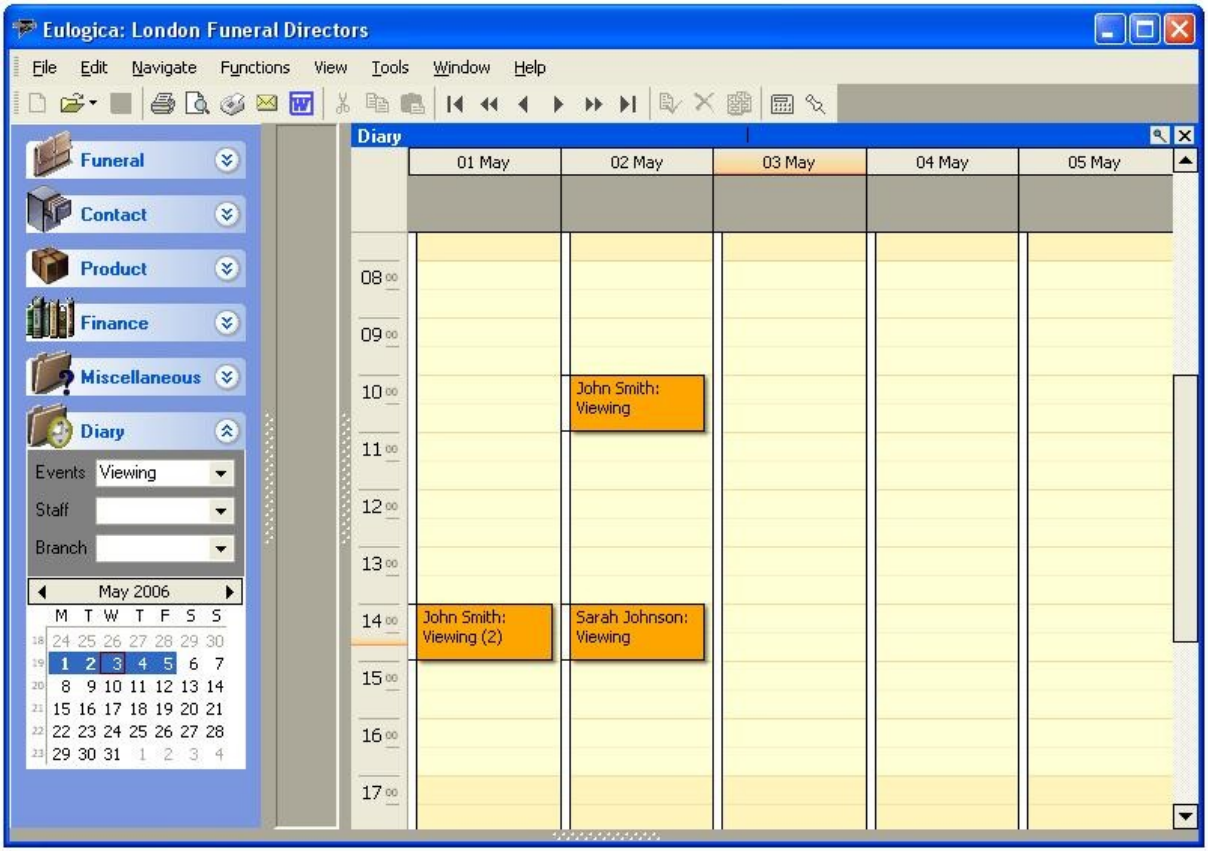
- **Staff** – Choose the staff who are conducting the funerals. This will only show the funerals which a particular member of staff is conducting.

- **Branch** – Choose the branch where the funeral is being arranged from. This will only show funerals for that particular branch.

To use the filters simply select from one of the drop down boxes the items you wish to filter on. To clear the filters simply use the delete key to remove the information from the filter fields.

The filter below is set to highlight on the 'Viewing' events. All other entries are made invisible.

The screen shot below shows the diary with the filter set to highlight only the 'Viewing' events. All other entries are made invisible.



D.3 Diary entries

Entries into the diary can be made in two ways, automatically and manually. Clicking on a funeral related diary entry will also open up the funeral window for that particular funeral.

D.3.1 Automatic entries

The diary is automatically populated with funeral details as each funeral is entered into the software. This means that as you enter funeral details into the main part of the software, it will then automatically transfer these details to the diary. No further action is required. These diary entries include events such as the funeral itself, home or church takes, viewings etc. Different events are also colour coded differently to give the user a quick overview from the diary.

Colour coding can also be achieved for different branches. To change the diary colour coding for a particular branch select **Tools | Branches** then double click the particular branch and then select the **Diary** tab. Here you will be presented with the option to choose many different colours for that particular branch.

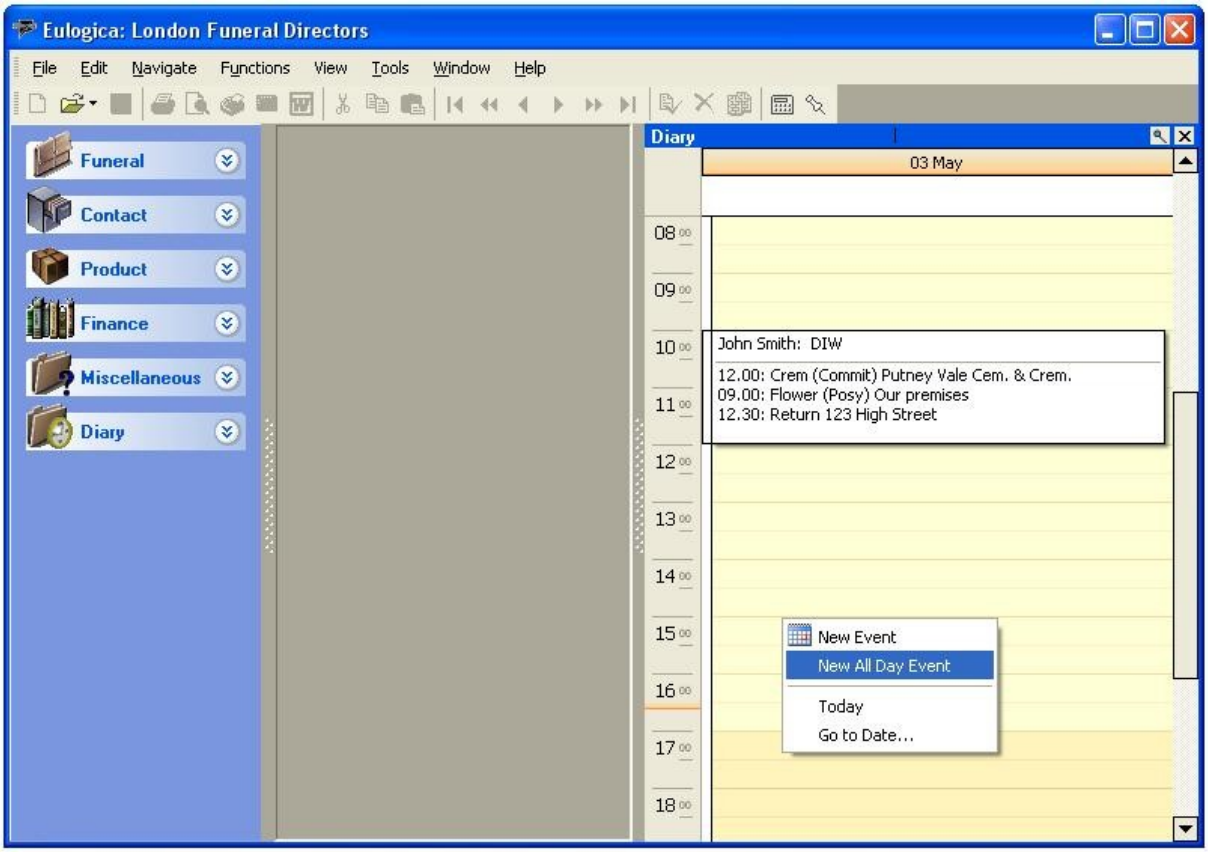
D.3.2 Manual entries

Diary entries can also be entered manually for other events such as meetings etc. Manual entries can be achieved in two ways.

By double clicking a blank slot on a particular day in the diary you will be presented with a diary entry window. The start and finish dates and times will initially be taken from where you double clicked in the diary. These will depend upon the time-scale chosen for the diary.

By right clicking anywhere in the diary you can select either a **New event** or a **New all day event**. Selecting a **New all day event** simply checks the All day tick box in the diary entry window. All day entries are then entered into the very top bar of the diary for the particular day.

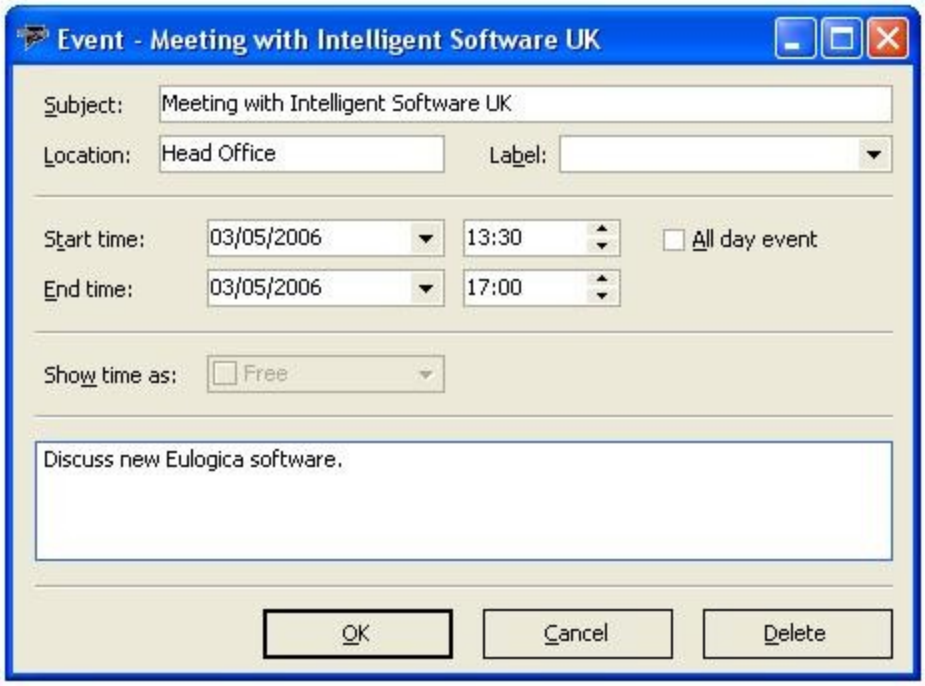
The screen shot below shows the menu that appears when you right click in the diary.



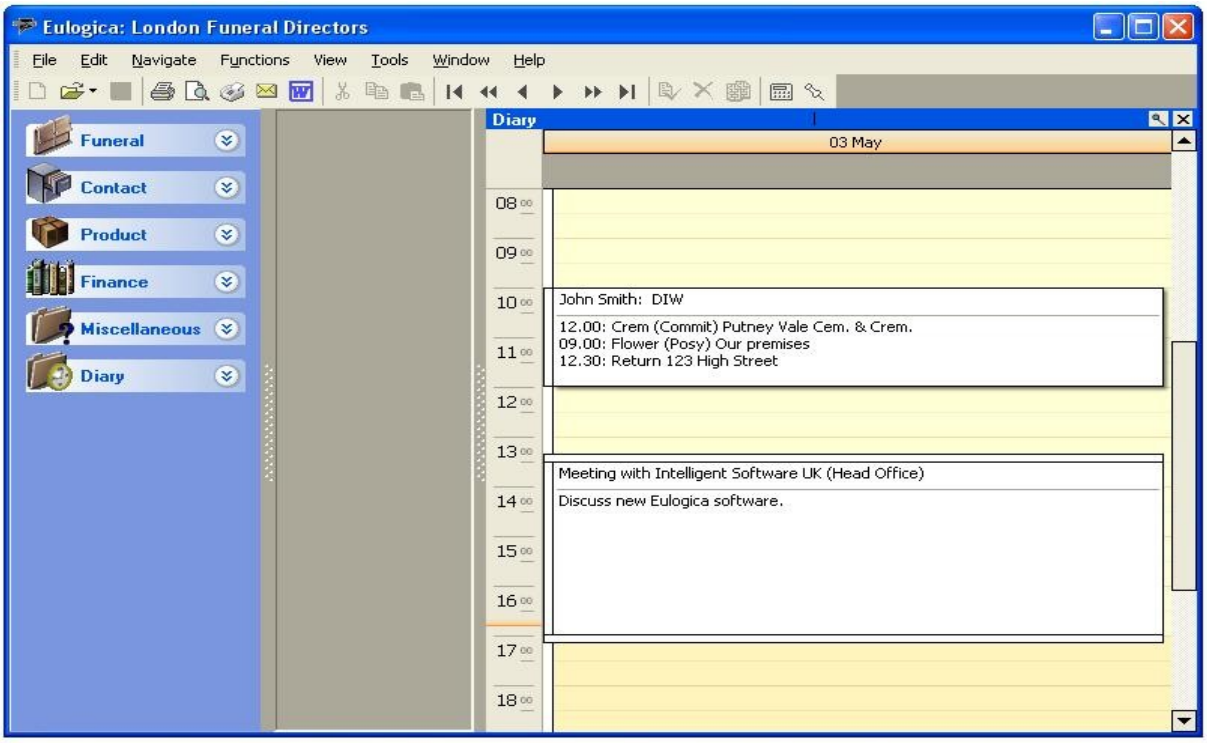
On selecting a new diary entry you will be presented with the window shown below. Simply enter the details as required and click **Ok** to have the entry entered into the diary. Unfortunately the colour

labels have been used to allow funeral events to be colour coded and currently do not work when manually adding diary entries.

The screen shot below shows a manual diary entry window.



The above details will produce a diary entry as shown below.

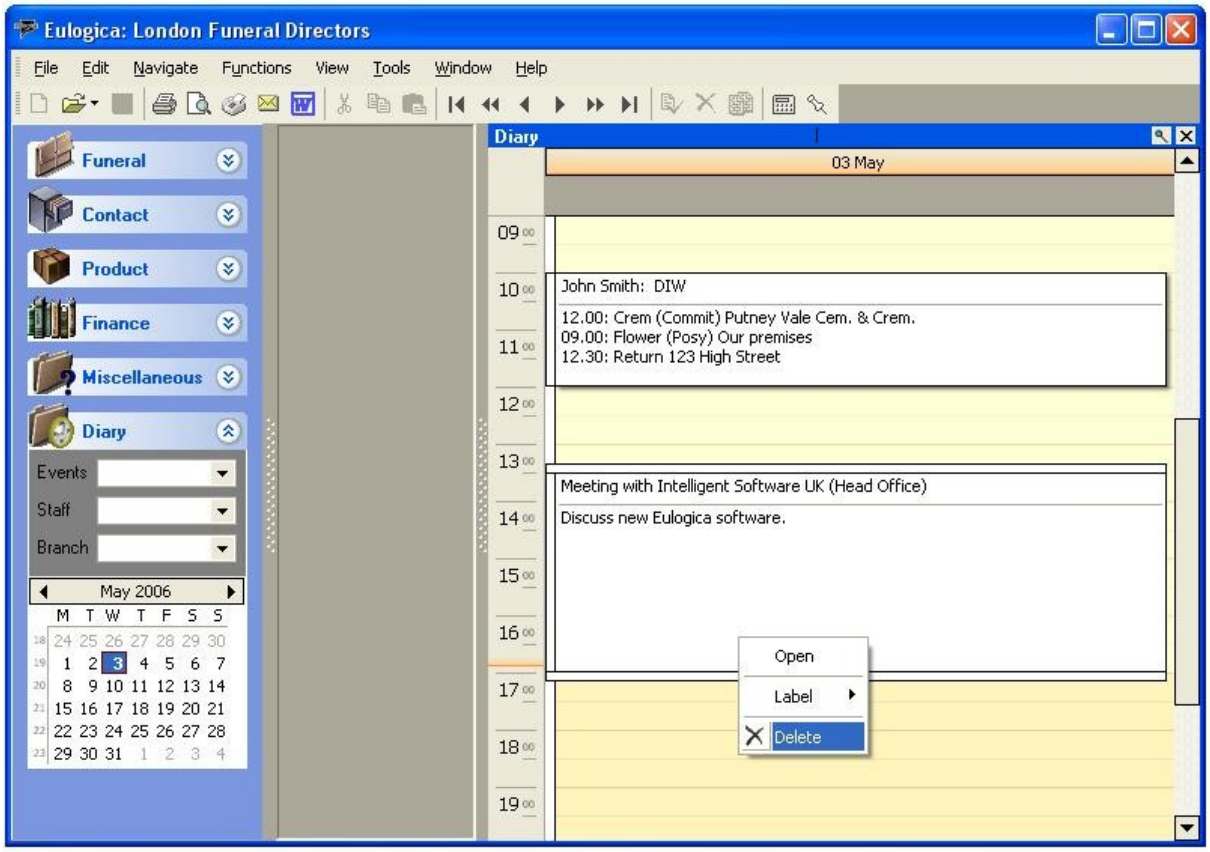


D.3.3 Deleting manual diary entries

Automatic funeral related entries will only be deleted if the particular event is removed in the funeral window.

Manual entries can be deleted as follows. Either double click the event to open the event window and then click **Delete** or right click on the event and select **Delete**. Once entries have been deleted the only way to add them back in again is manually. There is no 'undo' button.

The screen shot below shows the menu which appears when right clicking in a manual diary entry.

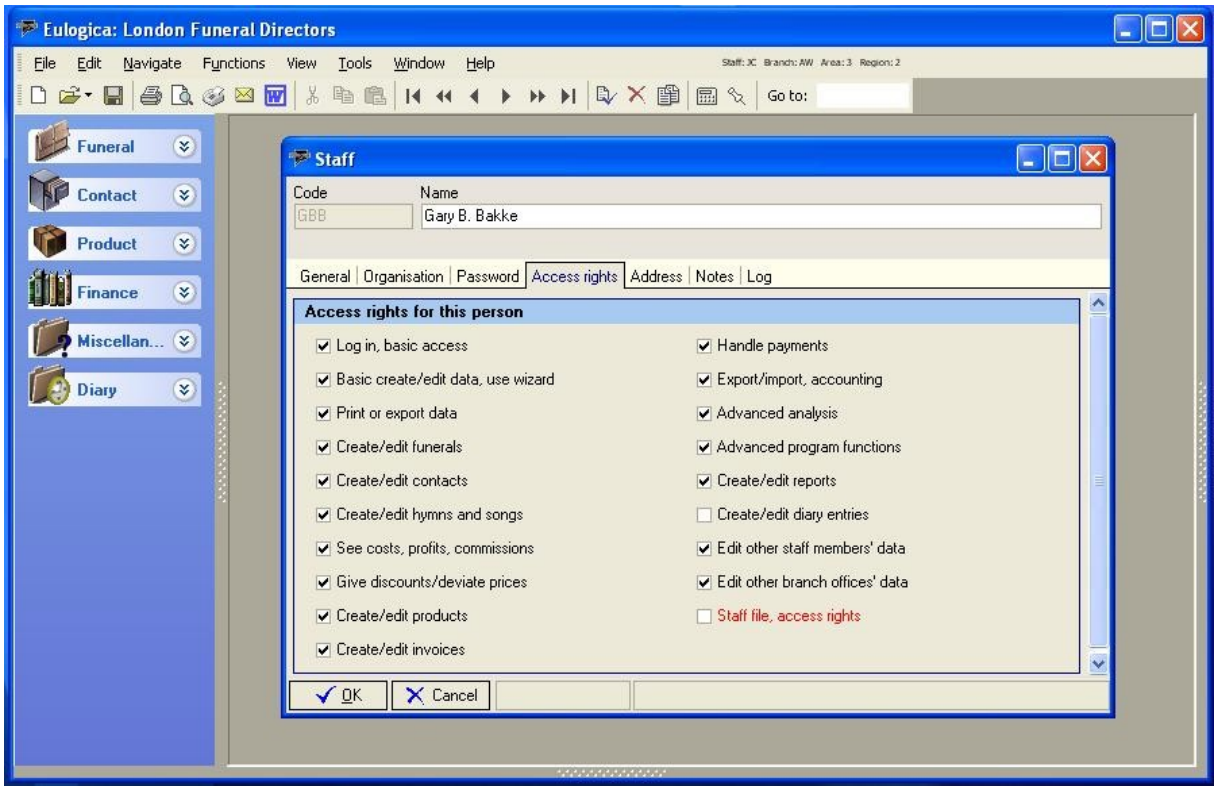


D.3.4 Manual entry access rights

Access rights for manual diary entries can be changed for individual members of staff. Staff can either be given the rights to add, edit and delete manual entries or not.

This is achieved by selecting **Tools | Organisation | Staff** from the top menu and then opening the relevant staff member. Once you have opened the staff member file select the **Access rights** tab. You will then be presented with a screen where various different access rights can be changed. Look for the **Create / edit diary entries** check box and either check to give rights to add, edit and delete diary entries or uncheck to take away those rights. Once finished click **Ok** to save the changes and make them active.

The screen shot below shows access rights removed for adding, editing and removing diary entries for staff member Gary B. Bakke.

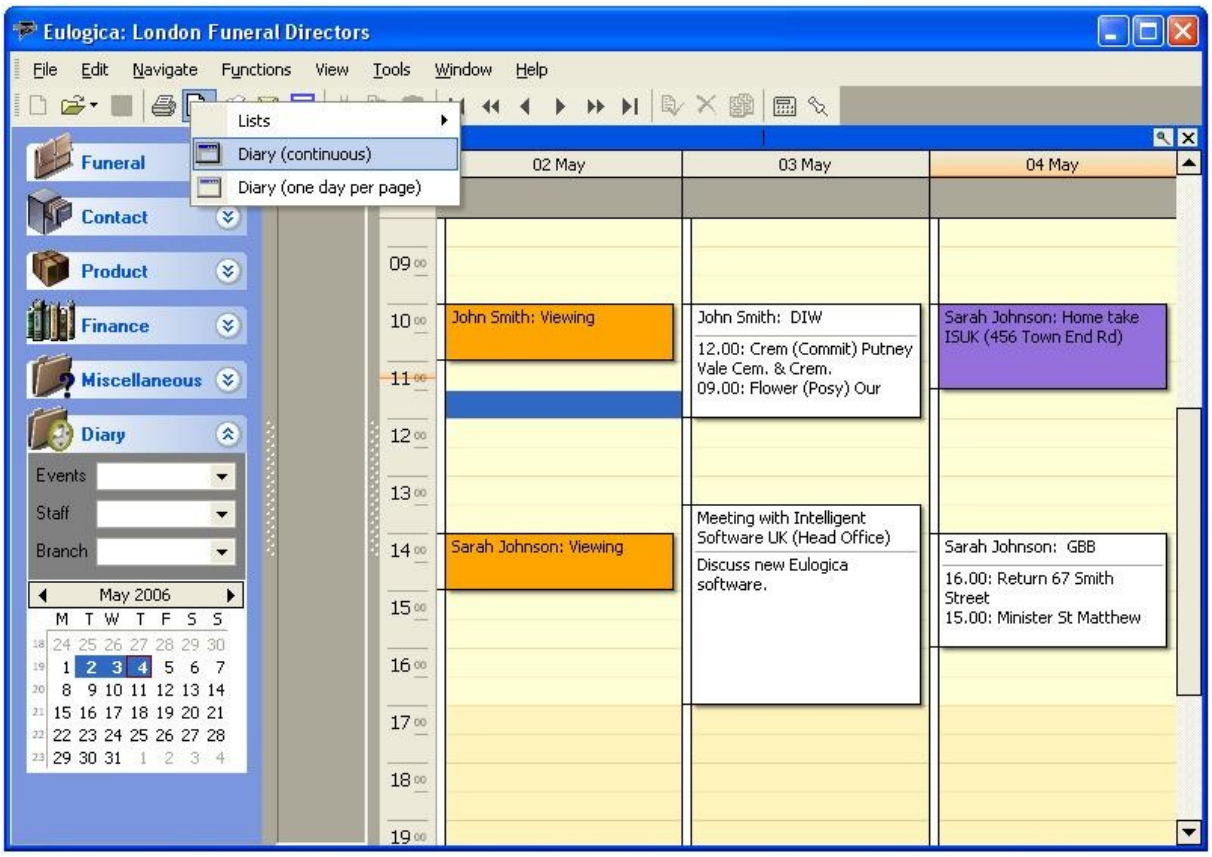


D.4 Diary printing

Printing from the diary is very simple. First of all select the days of the week you wish to view and also the filter options as described earlier. These are the events that will then be printed. Next use either the **Print** button or the **Print preview** button in the top menu.

The **Print** button will send the document straight to the printer for immediate printing, whilst the **Print preview** button will give you an on screen display before you decide to print. On selecting either of these buttons you will be presented with the same options. These options are as follows:

- **Diary (continuous)** – prints each day of the diary selected straight after each other on the same page.
- **Diary (one day per page)** - prints each day of the diary selected on a separate new page.



Tip: if, when trying to print the diary you are presented with the following error message

Simply click once somewhere in the main diary and try again.

A sample Diary printout is shown below - **Dairy (continuous)**

Diary				**Tuesday 2 May 2006**
10:00	**Viewing**	**Mr John Smith**		WIM
14:00	**Viewing**	**Mrs Sarah Johnson**		RIC
Diary				**Wednesday 3 May 2006**
10:00	**Conductor**	**Mr John Smith**	100151 DIW internal	WIM
	Floral Tribute	(Posy) 15/2/2006 9:00 Golden Leaves Limited . Our premises.		†
10:15	Hearse	(Cortege)		
10:30	Cortege	(2) Smith, 123 High Street, Newtown, Somewhere SW1Y 4LR.		
11:00	Church Service	All Saints church, Wandsworth.		
12:00	Cremation	(Commit) Putney Vale Cemetery & Crematorium.		
	Minister at Funeral	Rev John Smith. All Saints church, Wandsworth.		
12:30	Limousines return	Mrs Sheila Smith, 123 High Street, Newtown, Somewhere SW1Y 4LR.		
13:30	**Meeting with Intelligent Software UK**			
Diary				**Thursday 4 May 2006**
10:00	**Home take**	**Mrs Sarah Johnson**	(Day) ISUK 456 Town End Rd.	RIC
14:00	**Conductor**	**Mrs Sarah Johnson**	100153 GBB	RIC
09:00	Floral Tribute	Intelligent Software UK Ltd. Our premises.		†
14:00	Hearse	(Cortege)		
14:15	Cortege	(2) Johnson, 456 Town End Rd London.		
15:00	Church Service	St Matthew church, Wimbledon.		
15:45	Burial	Putney Vale Cemetery & Crematorium.		
15:00	Minister at Funeral	Rev John Smith. St Matthew church, Wimbledon.		
16:00	Limousines return	Mr Brian Johnson, 67 Smith Street London.		

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E Contacts

E.1 Introduction

The Contacts section of Eulogica is a central database where contact details can be stored for various different groups of people. This can include suppliers, churches, ministers, doctors, etc. and will vary depending on how your system has been configured.

Contact details can quickly be added, edited or deleted as required. Once changed all users will then see the updated details ensuring that everybody has the same correct information. Various different details can be stored including name, address, telephone numbers, facsimile number, email address, web page details etc. There are also some free information fields which can be tailored to suit the individual group of contacts. For example, under the Charities contact file you may wish to store the registered charity number.

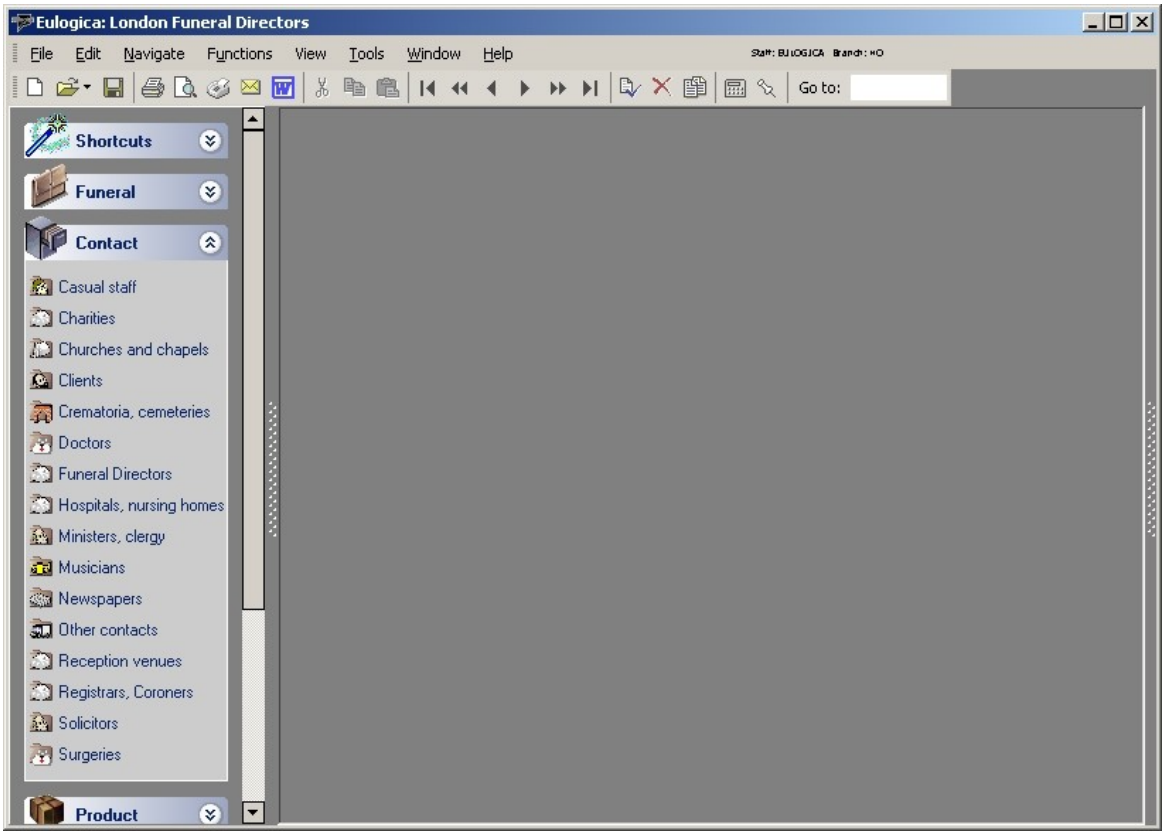
The contact details are arranged into particular groups to enable easier funeral detail entry when adding a funeral record. For example, when entering a funeral record which has cremation details to be added, you do not want to have to look through all records which include crematoriums, churches, charities etc. By arranging the contact details into groups the selection of such things like crematoria can be made much easier if you are only presented with crematoria details.

E.2 Accessing contact records

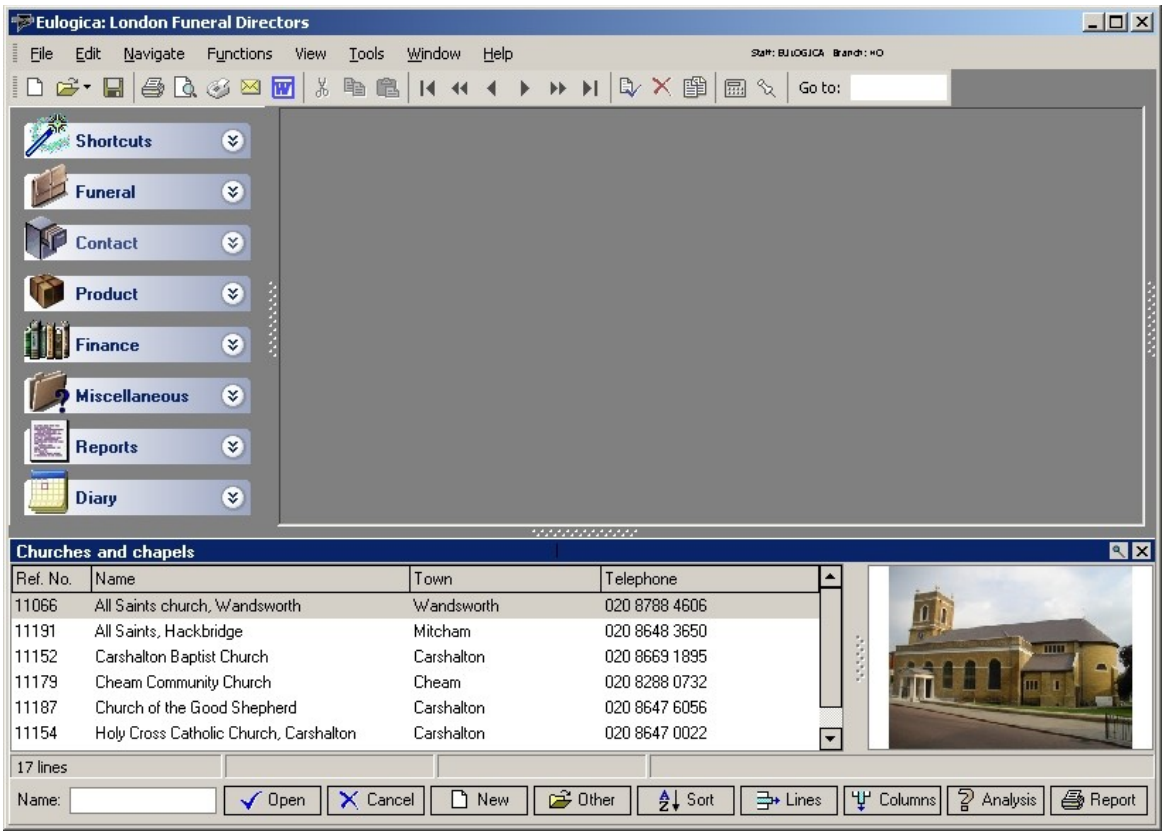
To access a particular contact first of all select **Contact** in the main menu. You will then be presented with a list of the various contact groups that have been set up for you. Simply click on the group you require to open those contact files.

Once you click on the contact group you require, a window will appear towards the bottom of the screen with a list of those particular contact files. This window can be resized by clicking and dragging the dotted zone located in the middle of the top of the window. Clicking once on the dotted zone will shrink the window down to the bottom of the screen. To reopen the window simply click on the dotted zone again which is now located right at the very bottom of the screen.

*The screen shot below shows the **Contact** list opened.*

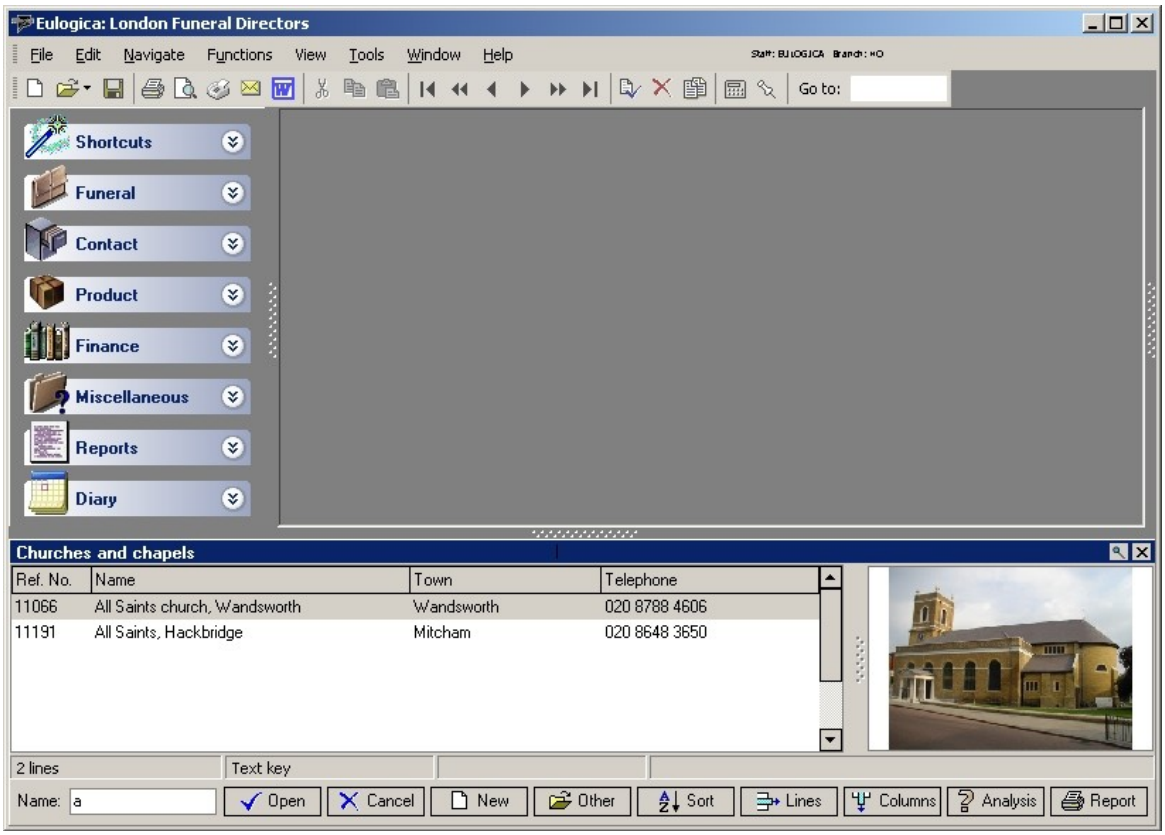


The screen shot below shows the Churches and chapels contact window opened.



The contact records can be scrolled up and down using the mouse and scroll bar, the cursor keys on the keyboard or the navigation buttons in the top menu. To select a particular record to view simply double click the entry or highlight the entry and click **Open** in the bottom of the screen. The number of records in the file is shown in the bottom left hand corner of the screen. In the previous screen shot it showed 5 lines, indicating 5 records.

Where there are many contact records, you can filter the records down to make it easier to find the one you are looking for. By default the contact records are sorted in name order. You will see in the bottom left hand corner of the screen that there is a box titled **Name**. Here you can start to type in the name of the contact you are looking for and the records will be filtered out. The example shown below shows the **Churches and chapels** contact list with the letter '**a**', typed in the name box. You will see that only records with the name beginning with 'A' are now shown (this box is not case sensitive).

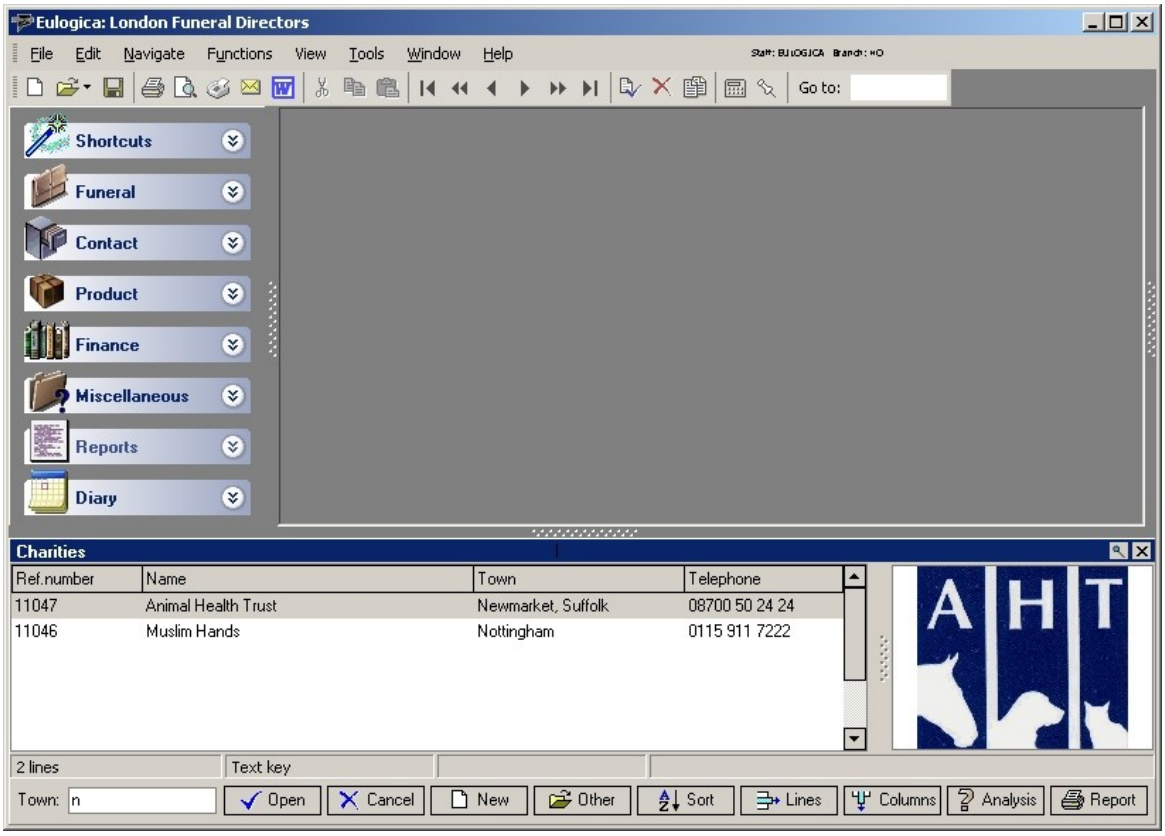


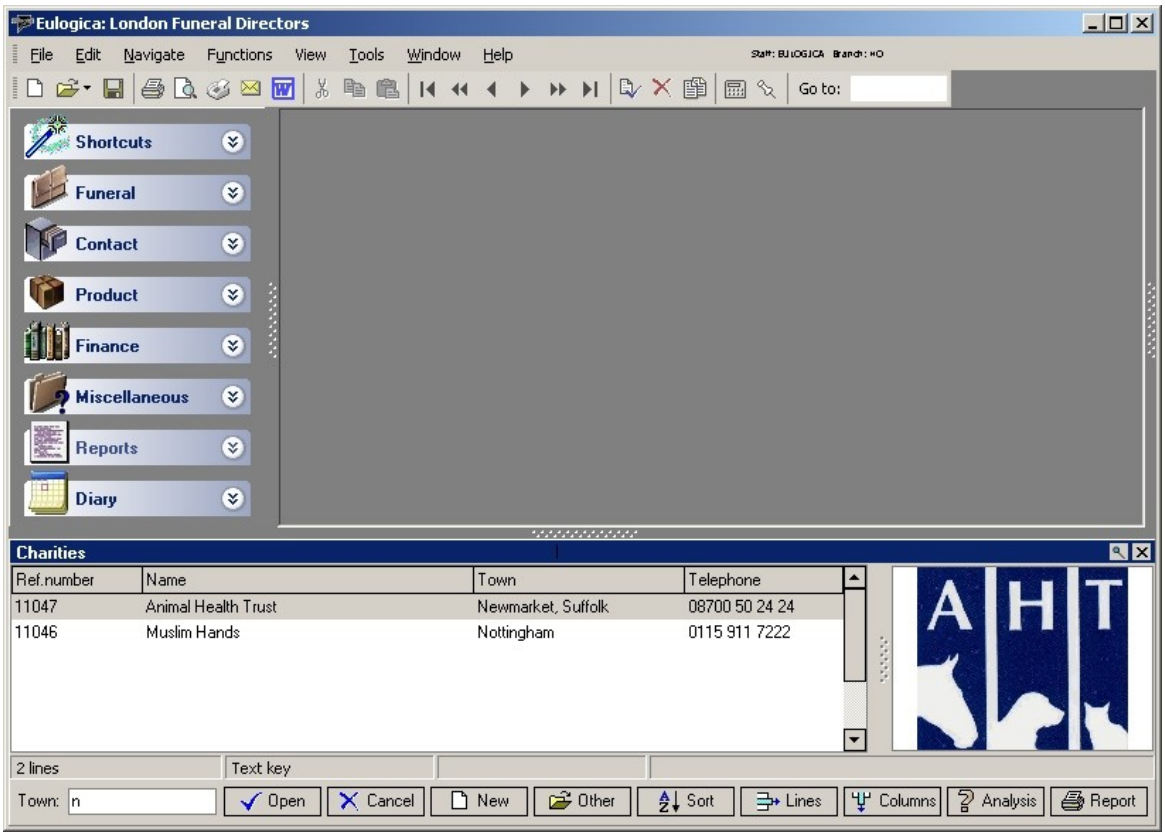
To remove the filter simply delete the characters entered in the name box and all the records will appear again.

It is also possible to sort the records in other ways. To achieve this click on the **Sort** button in the bottom menu and select how you want to sort the records. Once you have selected your new option, the title of the filter box in the left hand corner will reflect this. The records will now be sorted under the heading you have chosen and if you type anything in the filter box it will be actioned on the new sort option.

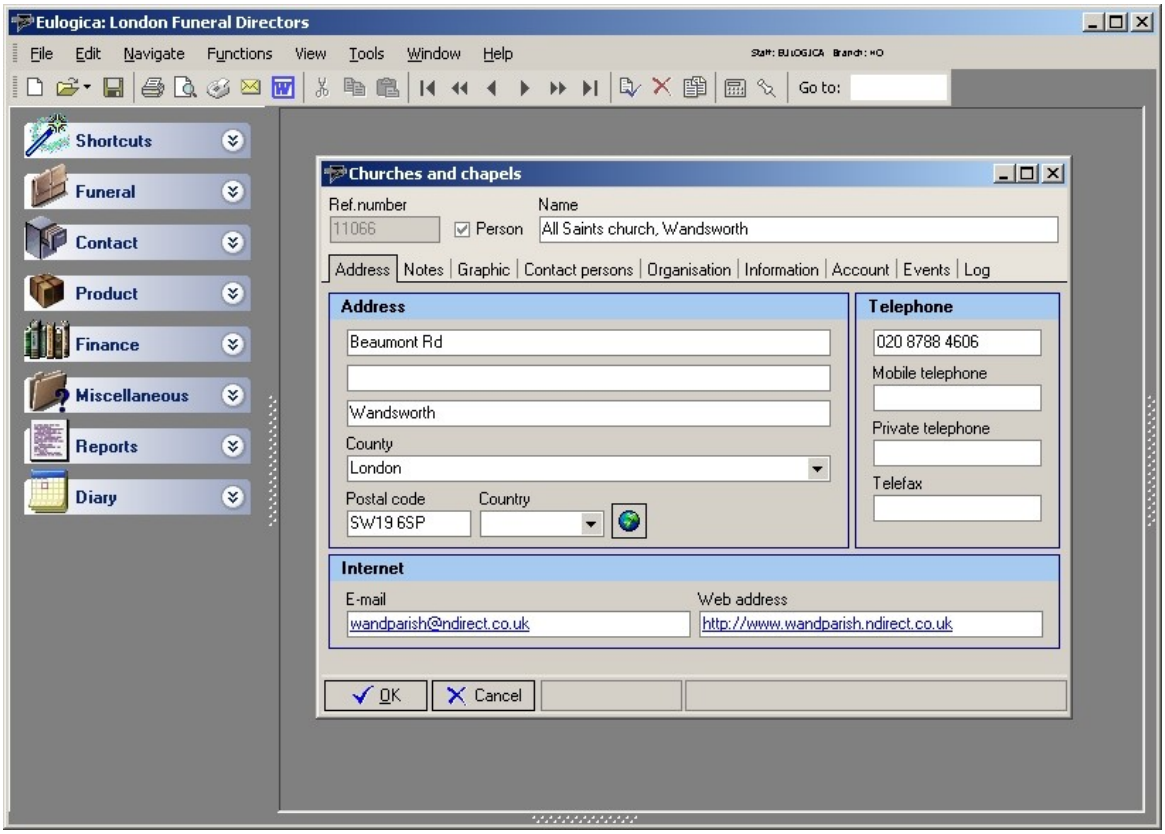
The sorting option will always revert to its default setting of **Name** the next time the contact files are opened using the main menu.

The screen shots below show the Charities contact file sorted by Town and then filtered using the letter 'n'.





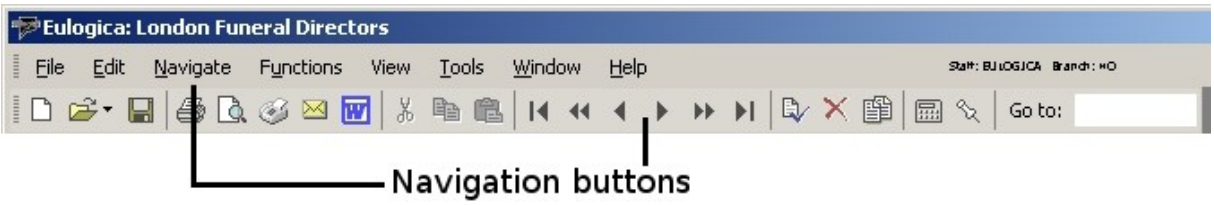
To select a particular record to view simply double click the entry or highlight the entry and click **Open** in the bottom of the screen. This will then open that particular contact record where all details can then be viewed. Some details are stored under the different tabs within the window and can be viewed by selecting the particular tab.



If a full postcode is entered in the address section and you have internet access, then by clicking on the **World** symbol a web browser will be opened and a street plan displayed.

Similarly by double clicking on an **E-mail** address this will open your default email programme and enter the email address automatically. By double clicking on the **Web address** a web browser will be opened and and the web address will automatically be entered.

Once you are in an actual contact record the **Navigation** buttons on the top menu can be used to move between records in the same contact group. The single left and right arrows move you 1 record either way in the contact group. The double arrows move you 10 records either way in the contact group and the arrows with the vertical line move you either to the beginning or the end of the contact group. These buttons, shown below, can be useful for browsing through records in a contact group.



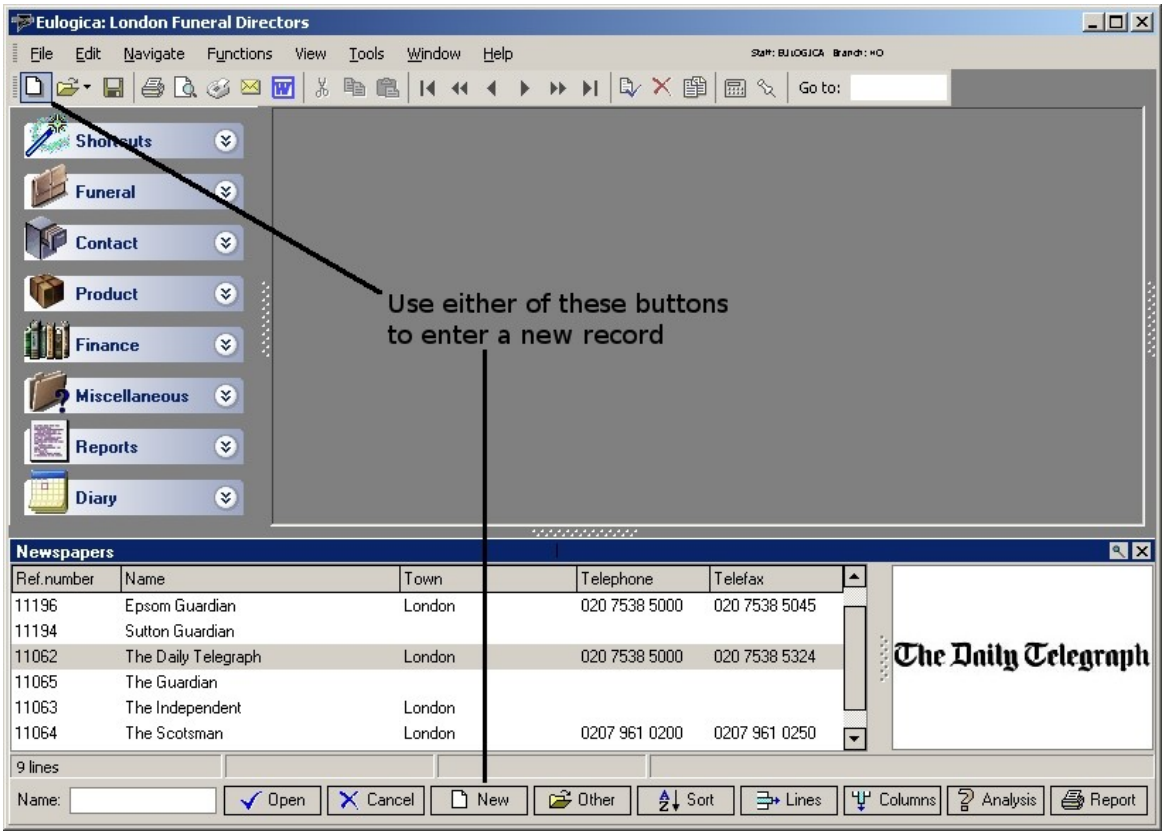
E.3 Amending contact records

Contact records are only of any use if they are kept up to date, deleted when they are no longer valid and added where needed. This section looks at adding, editing and deleting contact records.

E.3.1 Adding contact records

To add a contact record you must first of all open up the contact group where you want to add the record. Click on **Contact** in the main menu and then click on the desired contact group. This will then open up that particular contact list. In the bottom menu click on the **New** button. This will then open a blank contact record which can then be filled in with as many or as few details as you have available. Remember that there are different tabs for further information fields if required. Click **OK** in the bottom left hand corner of the window to close and save the new record. Further details can always be added at a later stage if so desired.

*The screen shot below shows the **Newspapers** contact group opened with the various options shown for adding a new record.*



As well as using the **New** button in the bottom menu you can also use the **File | New** option from the top menu or the standard windows **New** icon, also in the top menu.

Tip: if you are entering a number of new contact records in the same contact group, you can simply click either of the above options once you have completed a record. This will save the record you have just entered and open up a new blank record ready for data entry.

E.3.2 Editing contact records

Editing / amending contact records is very easy. Simply open up the contact record you wish to edit using **Contact** from the main menu, then select the contact group and finally open up the required record. Then simply make the necessary changes to the record. This may simply be changing a telephone number or adding in a post code perhaps.

After you have made all the changes you can then either opt to save the changes or not save the changes.

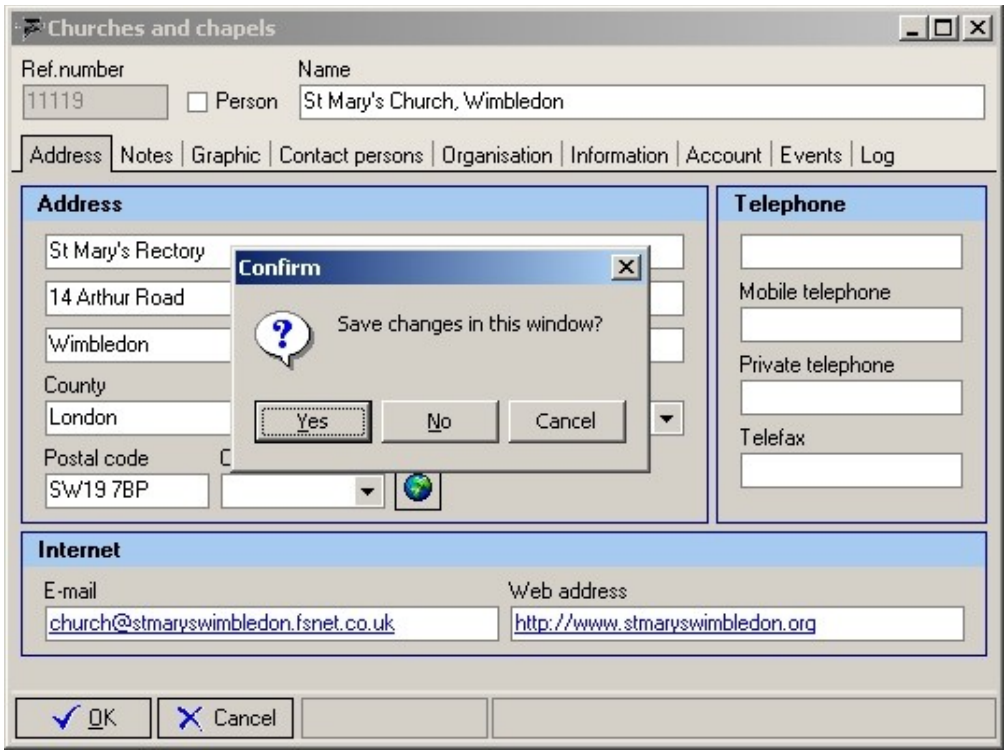
- **Saving the changes.** If you are happy with the changes made and wish to save these amendments click **OK** in the bottom left corner of the window. The changes will be saved and the window closed. Anybody else opening that particular record will now see the record with the changes that have just been made.

- **Not saving the changes.** If you decide you don't want to save the changes you have just made then click the **Cancel** button in the bottom of the window. You will then be asked if you want to save the changes you have just made and be given 3 options.

  - **Save changes in this window? Yes** – will save the changes and close the window.

  - **Save changes in this window? No** – will NOT save the changes and close the window.

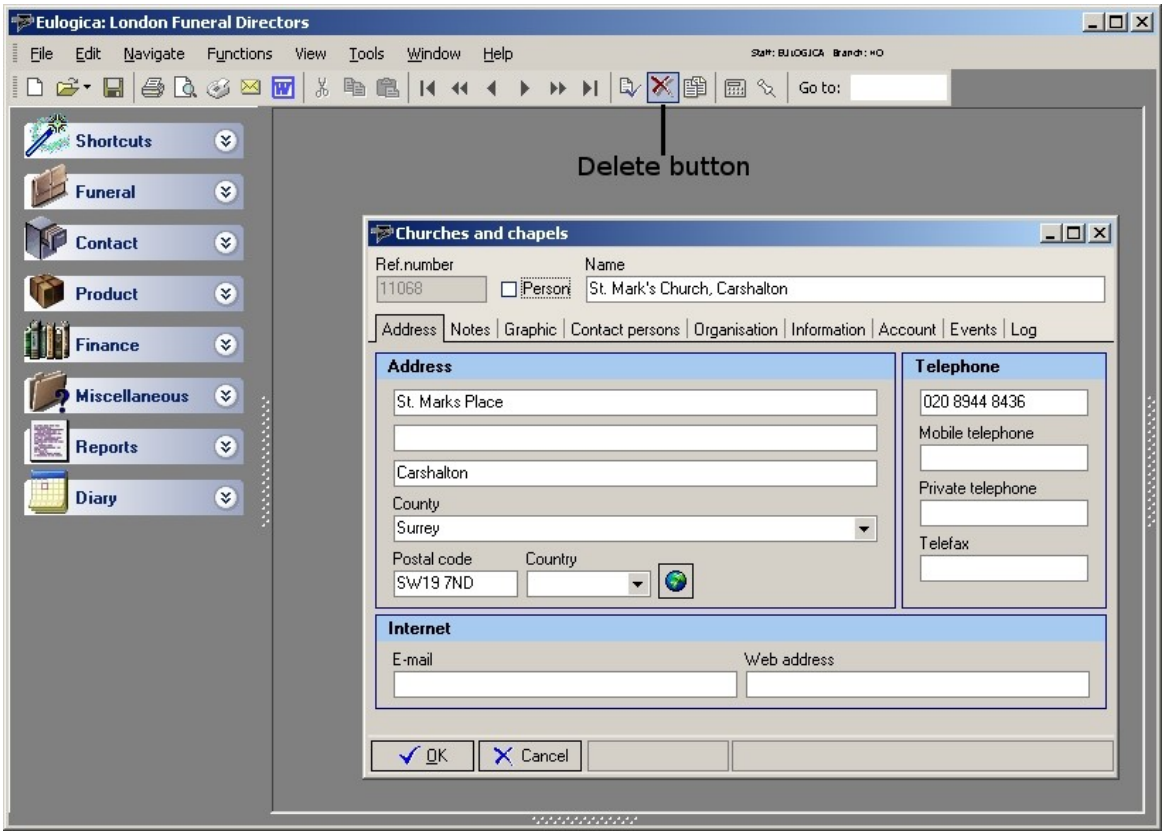
  - **Save changes in this window? Cancel** – will NOT save the changes, but will allow you to carry on editing the data in the window.



E.3.3 Deleting contact records

Records can be deleted if so desired. This is useful if the contact information is no longer relevant and you do not wish people to have reference to it. The software does not have a limit to how many records can be stored and it is NOT necessary to remove records which you may think you will not use again.

To delete a record first of all open up the contact record you wish to edit using **Contact** from the main menu, then select the contact group and finally open up the required record. If you are sure you wish to delete this record then click on the red **X** in the top menu.



Once you have clicked the **Delete** button you will then be asked to confirm that you really do want to delete this record.

- Selecting **Yes** will delete the record.
- Selecting **No** will cancel the delete request and continue to show the record.

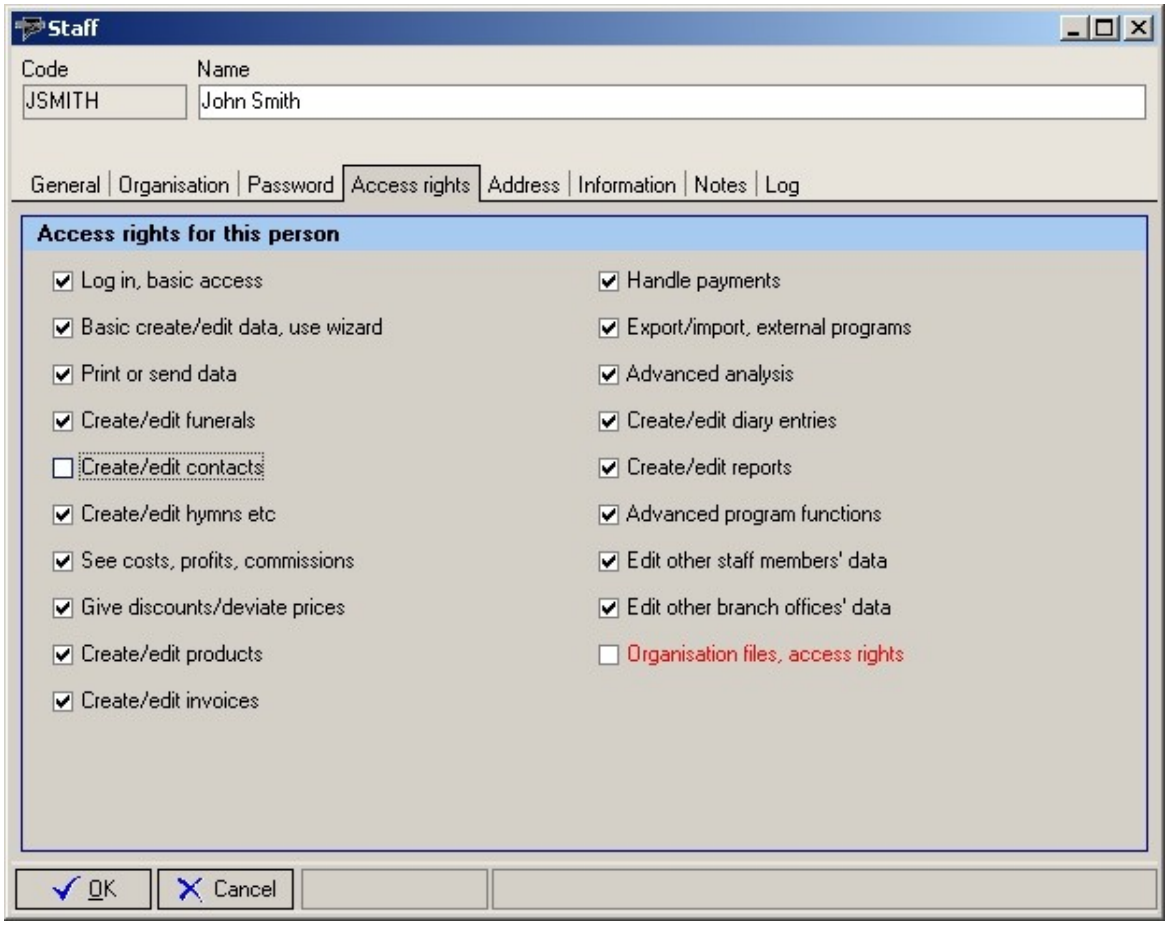
Important! There is no undelete button so please ensure that you do really want to delete the record.

E.3.4 Create / Edit contacts access rights

Access rights for creating and editing contacts can be changed for individual members of staff. Staff can either be given the rights to add, edit and delete contacts or not.

This is achieved by selecting **Tools | Organisation | Staff** from the top menu and then opening the relevant staff member. Once you have opened the staff member file select the **Access rights** tab. You will then be presented with a screen where various different access rights can be changed. Look for the **Create / edit contacts** check box and either check to give rights to add, edit and delete contacts or uncheck to take away those rights. Once finished click **Ok** to save the changes and make them active.

The screen shot below shows access rights removed for adding, editing and deleting contacts for staff member John Smith.



E.4 Other useful fields

As well as standard name, address and contact details, there are a few other fields within the Contact records which you may find useful. Some fields will be used for more advanced installations of Eulogica where there may be a number of branches grouped under a particular area for example. Simply ignore these fields if they are of no benefit to your particular installation. Listed below is a brief explanation of the various tabs and the fields found within those tabs.

E.4.1 Contact persons

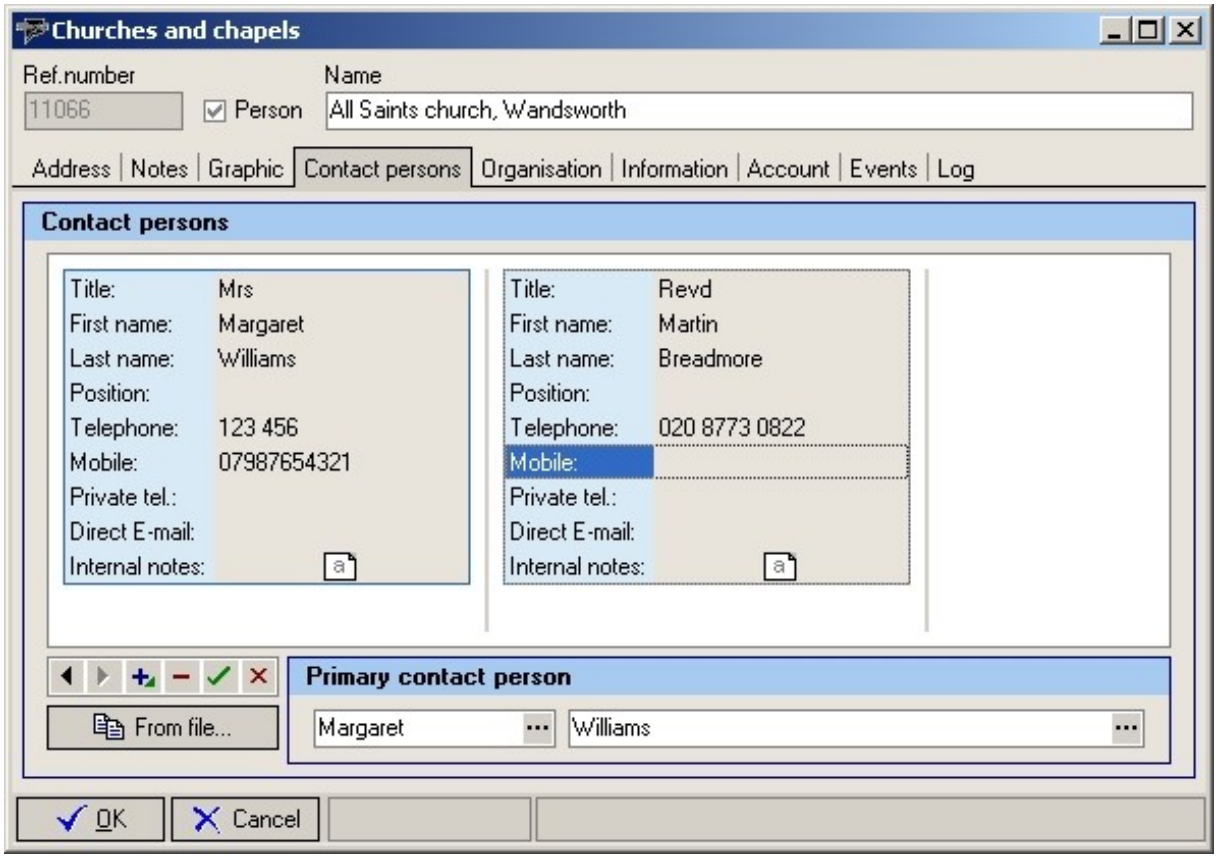
If the **Person** check box on the top line of the Contact record is not checked then the **Contact Persons** tab will appear. This allows you to have a Contact record which may be the name of a company. The **Contact persons** tab then allows you to record the names of various people within that company.

Simply use the **+ button** in the bottom left hand corner of the window to add a new contact person. This will create a new sub record with fields for Title, First name, Last name etc. Fill in the fields you have information for and then click on the **green tick** in the bottom left hand corner of the window. This contact person will then be added. Further contact persons can be added by simply clicking the **+ button** again and entering the details into a new sub record. To delete a contact person simply click inside the relevant record and click the **– button** in the bottom left hand corner of the window.

There is also a button labelled **From file**. This is specifically aimed at allowing you to copy details from perhaps the **Ministers, clergy** file into a **Church** contact file. For example, if you were adding the details of a specific Church, you could use the **From file** button to simply copy in previously entered details of a Minister into the **Contact persons** section of the Church contact file. Simply click on the **From file** button which will then open the **Ministers, clergy** file. Find the particular person you want to add to the Church contact persons file and double click their name. Their details will then be added to the Contact persons record. To choose contacts from a different file, such as Musicians, press the **Other** button at the bottom of the list and choose the file you want to look through.

The **Primary contact person** field can be used to highlight which of the entered Contact persons is the primary contact. By default this will be the first person entered in the Contact persons record. To change this simply click on the **3 dots** in either of the 2 fields in the **Primary contact person** part of the window. Clicking in the first field will open up all the Contact persons associated with this contact in first name order and clicking in the second field will open them in last name order. Double click on the one you wish to be the primary contact. Their name will now appear in the **Primary contact person** part of the window.

*The screen shot below shows one contact imported from the **Ministers, clergy** file using the **From file** button and another contact set as the **Primary contact person**.*



E.4.2 Organisation

The **Organisation** tab allows contacts to be grouped under various headings. This allows for larger organisations to group contacts into perhaps geographical area's or region's. When displaying a list of contacts there are options available in the **Lines** menu to limit the list to only the most relevant records:

Mine
My branch
My area
My region
My brand
All

These options are all relative to the details of the logged in user's Staff record. Hence it is possible to see e.g. only the churches in one user's Area, or only the graveyards associated with the Region.

Please note, for all types of records, changing the **Branch code** will also change the **Area**, **Region**, and **Brand code**, if such links exist in the **Branch file**. Changing the **Area code** will also change the **Region** and **Brand code**, if such links exist in the **Area file**. Changing the **Region code** will also change the **Brand code**, if such links exists in the **Region file**.

There is also the option to group contacts into **X**, **Y** and **Z groups**. These groups can be set up and a particular contact can be assigned to that group. For example, you may wish to set up the **X group** as a religion field. This would then allow you to categorise Ministers into various religious groups which have been set up. When displaying a list of contacts there are options available in the **Sort** menu to filter the list to what ever you choose. This would then allow you, using the **Sort** menu, to look up say all contacts in the Ministers file which you have set the **X group** to Methodist.

Please see your software supplier for further advice on using the **Organisation** tab.

E.4.3 Information

The Information tab is split up into 4 sections. These sections have various functions and are described below.

E.4.3.1 Free information

The **Free information** section simply has 3 lines labelled **Info 1**, **Info 2** & **Info 3**. Here you can type in free text (up to 50 characters) to describe something about the contact. The labels **Info 1**, **Info 2** & **Info 3** can be renamed in the **Tools | Preferences menu** – see your software provider for further information.

When displaying a list of contacts there are options available in the **Sort** menu to filter the list by **Info 1**, **Info 2** & **Info 3**. This would then allow you, using the **Sort** menu, to look up say all contacts in a file which you have set the **Info 1** field to a particular setting.

E.4.3.2 Finance

Within the **Finance** section there are 3 fields for editing.

- **Standard fee:** This can be set up by your software provider so that if this particular contact is used in a Funeral record the standard fee can be taken from the contact record. This is useful for contacts like Ministers which may all have slightly different fees.
- **Credit code:** This can be used to set up the payment terms for a particular contact. Currently this has not been implemented.
- **No VAT**: Currently this has not been implemented.

E.4.3.3 Associated with

This section has been designed for linking a Minister with a Church. By clicking on the 3 dots on either the **Ref. number** or **Ref. name** fields you will open up the Churches and Chapels contact file. Using **Ref. number** will open up the list in reference number order whereas using the **Ref. name** field will open the same list in name order. You can then simply double click the particular Church and these details will be copied into the **Associated with** window.

E.4.3.4 Various

Within the **Various** section there are 5 fields for editing.

- **Salutation**: This can be used for personalising particular letters to a contact. For example, you may know a particular Minister by first name terms and prefer to write to them as Dear John rather than Dear Rev John Smith. Using the **Salutation** field you would simply type in the name you wish to address the contact by and this would be used in the letters produced by Eulogica. Please see your software provider for further information.

- **Their reference**: Simply a field labelled **Their reference**. Currently this has not been implemented to appear in any documents, but can be used for your own on screen reference purposes.

- **Company number**: Simply a field labelled **Company number**. Currently this has not been implemented to appear in any documents, but can be used for your own on screen reference purposes.

- **District**: Simply a field labelled **District**. Currently this has not been implemented to appear in any documents, but can be used for your own on screen reference purposes.

- **Warning**: This field can be used to produce an on screen warning when a particular contact is used within a funeral record. Up to 50 characters can be entered and an on screen warning as shown below will appear. You may wish to use this as shown in the example below **('Please see the notes field')** to highlight to people that there is some important information regarding this particular contact.

E.4.4 Account

The **Account** tab will show any invoices and payments for a particular contact record. The main use for this is within the **Client** contact records, which get generated when a Funeral record is invoiced. See the **Invoicing** section for further details.

E.4.5 Events

The **Events** section is a place where events can be recorded for a particular contact. This should not be used to record information relating to particular funerals but general information about the contact.

Simply click the **New** button to add a new event. You can then fill in various fields to record details about the event. For example, you may want to use the **Type** field to record if it was a telephone call received or perhaps a meeting with the contact. You can also use the other fields to record date and time, a description of the event for ease of sorting for the information at a later date and perhaps some text. Once you have finished click the **OK** button to save the event. This will then be added to the list of **Events for this contact** and can be viewed, edited or deleted as desired.

E.4.6 Graphic

The Graphic tab can be used to store a photograph or logo associated with the contact. Simply **Right click** in the Graphic tab area to be given various options for loading graphics. Some options will be greyed out if no picture is currently loaded. These options include:

- **Cut:** Cuts the current picture from the **Graphics** tab but stores it in the clipboard for pasting.
- **Copy:** Copies the current picture form the Graphics tab and makes it available for pasting.
- **Paste:** Pastes in a picture from the clipboard.
- **Delete:** Deletes the current picture and does not store it in the clipboard.
- **Load...:** Opens up Explorer and allows you to search for a particular picture from your computer.
- **Save as...**: Opens up Explorer and allows you to save the current picture to your computer.

Please note that only JPEG images can be loaded into the contact file. Also, a maximum file size of approximately 50KB should be used to ensure that the performance of Eulogica is not affected. Using file sizes larger than this can significantly slow down the use of Eulogica as these files are loaded from the server.

E.4.7 Notes

The **Notes** tab is a place where simple text notes can be made. Simply enter the text you require in the **Internal notes** section.

E.4.8 Log

The **Log** tab keeps a history of when a contact record was created or changed and by which staff member. It does not record what changes where made but simply that the record has been changed. The main log file will also record if a contact record has been deleted. Please note that you may have to wait a few seconds for the log to appear after you have clicked on the **Log** tab.

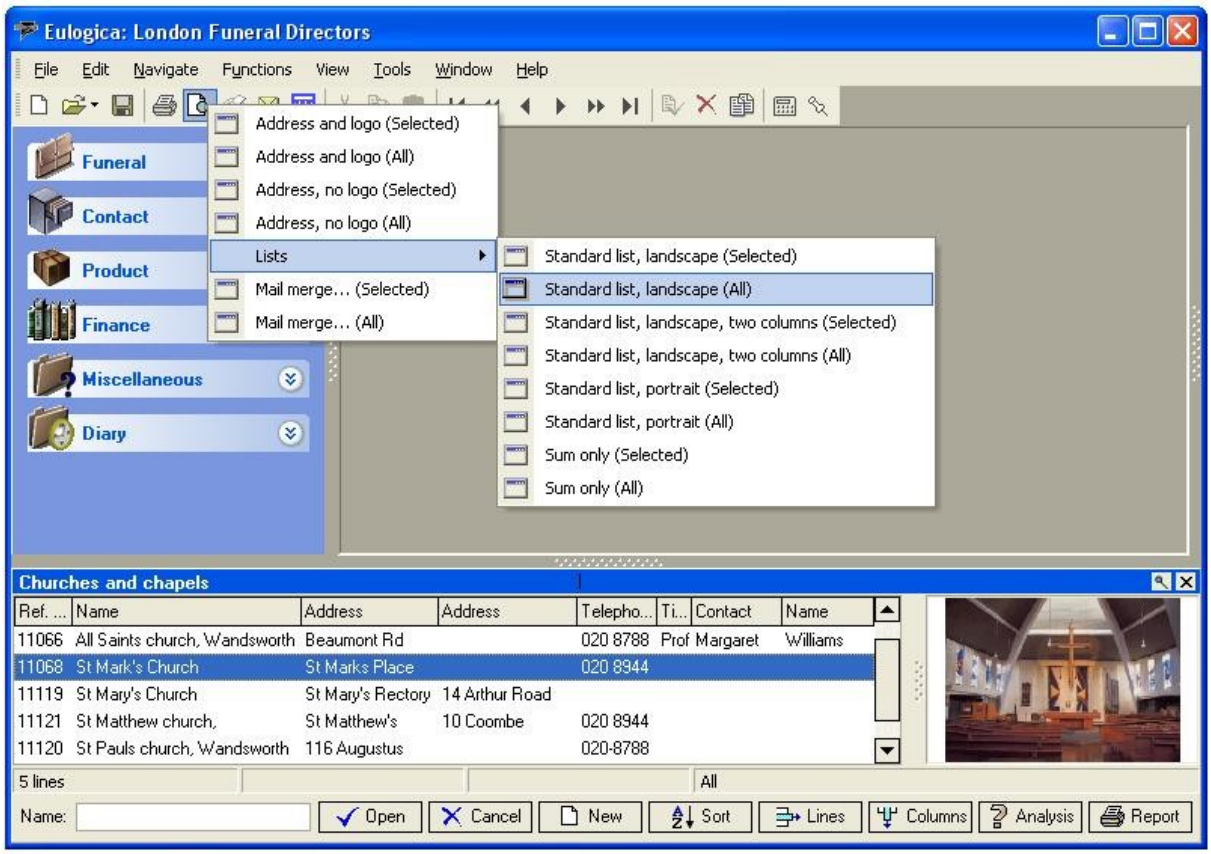
E.5 Printing contact details

As well as viewing contact details on screen, the contact lists for each group can be printed. First of all open up the contact list required by using **Contact** from the main menu and then selecting the required contact group. This will then open up that particular list of contacts. Click once on any record within the list to highlight a record. It does not matter which record you highlight, unless you only want to print details for just one record.

Next use either the **Print** button or the **Print preview** button in the top menu. The **Print** button will send the document straight to the printer for immediate printing, whilst the **Print preview** button will give you an on screen display before you decide to print. On selecting either of these buttons you will be presented with the same options.

From these options select **Lists** which will then give you various different printing options. Select the one desired and you will then either get a printout of the list or an on-screen preview which you can decide whether to print or not.

*The screen shot below shows the **Print preview** option selected along with the **Standard list, landscape (All)** option. This will preview all contact details within that contact group in a landscape format, as shown in the next screen shot.*



The screen shot below shows a sample of a contact list printed out in a landscape format.

Churches and chapels

Ref. No.	Name	Address	Address	Telephone	Title	Contact	Name
11066	All Saints church, Wandsworth	Beaumont Rd		020 8788 4606	Prof	Margaret	Williams
11068	St Mark's Church	St Marks Place		020 8944 8436			
11119	St Mary's Church	St Mary's Rectory	14 Arthur Road				
11121	St Matthew church, Wimbledon	St Matthew's House	10 Coombe Gardens	020 8944 1010			
11120	St Pauls church, Wandsworth	116 Augustus Road		020-8788 2024			

Count: 5

Please note that the contact list will be printed in the order shown on screen. The default sort option is by name, so this is how the list will be printed if no further action is taken. If you ask the software to sort on a different field then this is how the list will then be printed. Also, if you filter the list down to names beginning with the letter 'S', then the way the list appears on screen will be the way it is printed.

There are various different printing formats available, for example, landscape, landscape (two columns), portrait etc. These will print the same information, just in a different format.

Further details on the various printing options can be found in the Printing Options section.

F Products

F.1 Introduction

The Products section of Eulogica is a central database where your companies product details can be stored. Product records include a short description of the product for quick selection, a longer description if so desired for the invoice wording, price, a photograph of the product itself, accounting codes and many other details.

Product records can quickly be added, edited or deleted as required. Once changed all users will then see the updated details ensuring that everybody enters the correct products, prices and descriptions.

The product records are arranged into particular categories to enable easier funeral detail entry when adding a funeral record. For example, when entering coffin details in a funeral record you are only presented with products from the 'Coffin' category as you would not want to enter a hearse product here.

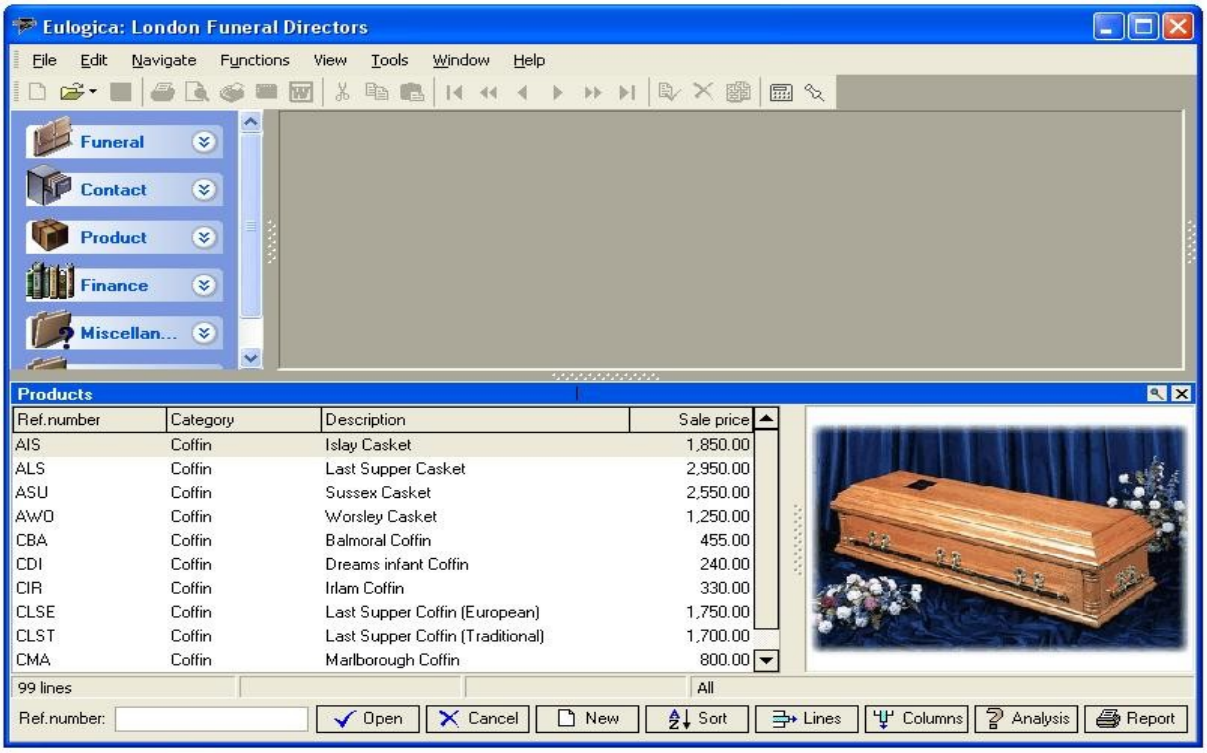
F.2 Accessing product records

To access the Product file simply select **Product** in the main menu followed by **Products**. A window will appear towards the bottom of the screen with a list of all products. This window can be resized by clicking and dragging the dotted zone located in the middle of the top of the window. Clicking once on the dotted zone will shrink the window down to the bottom of the screen. To reopen the window simply click on the dotted zone again which is now located right at the very bottom of the screen.

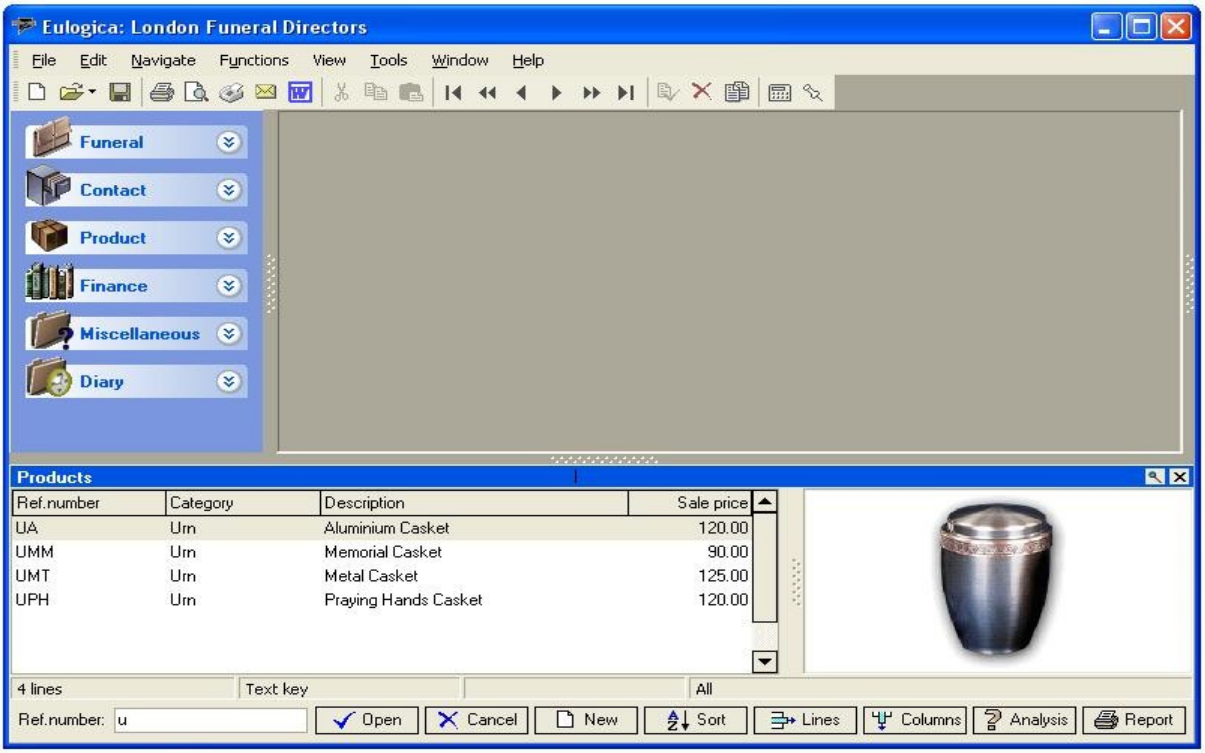
The product records can be scrolled up and down using the mouse and scroll bar, the cursor keys on the keyboard or the N**avigation** buttons in the top menu. To select a particular product record to view simply double click the entry or highlight the entry and click **Open** in the bottom of the screen.

Product records can be filtered to make it easier to find the one you are looking for. By default the product records are sorted in reference number order. You will see in the bottom left hand corner of the screen that there is a box titled **Ref. Number**. Here you can start to type in the product reference number you are looking for and the records will be filtered out.

*The screen shot below shows the **Products** list opened.*



*The screen shot shown below shows the **Product** list with the letter '**u**', typed in the reference number box. You will see that only product records with the reference number beginning with 'U' are now shown (this box is not case sensitive).*

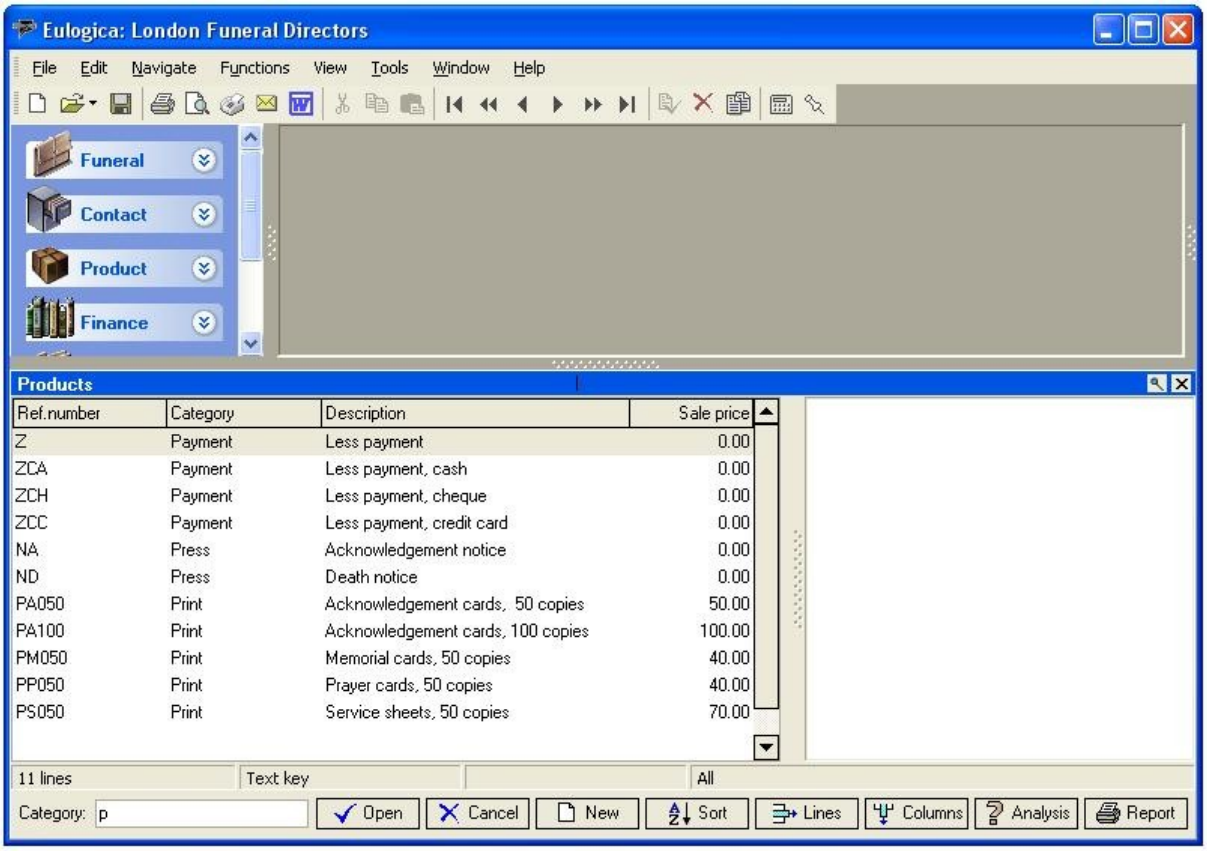


To remove the filter simply delete the characters entered in the name box and all the records will appear again.

It is also possible to sort the product records in other ways. To achieve this click on the **Sort** button in the bottom menu and select how you want to sort the records. Once you have selected your new option, the title of the filter box in the left hand corner will reflect this. The records will now be sorted under the heading you have chosen and if you type anything in the filter box it will be actioned on the new sort option.

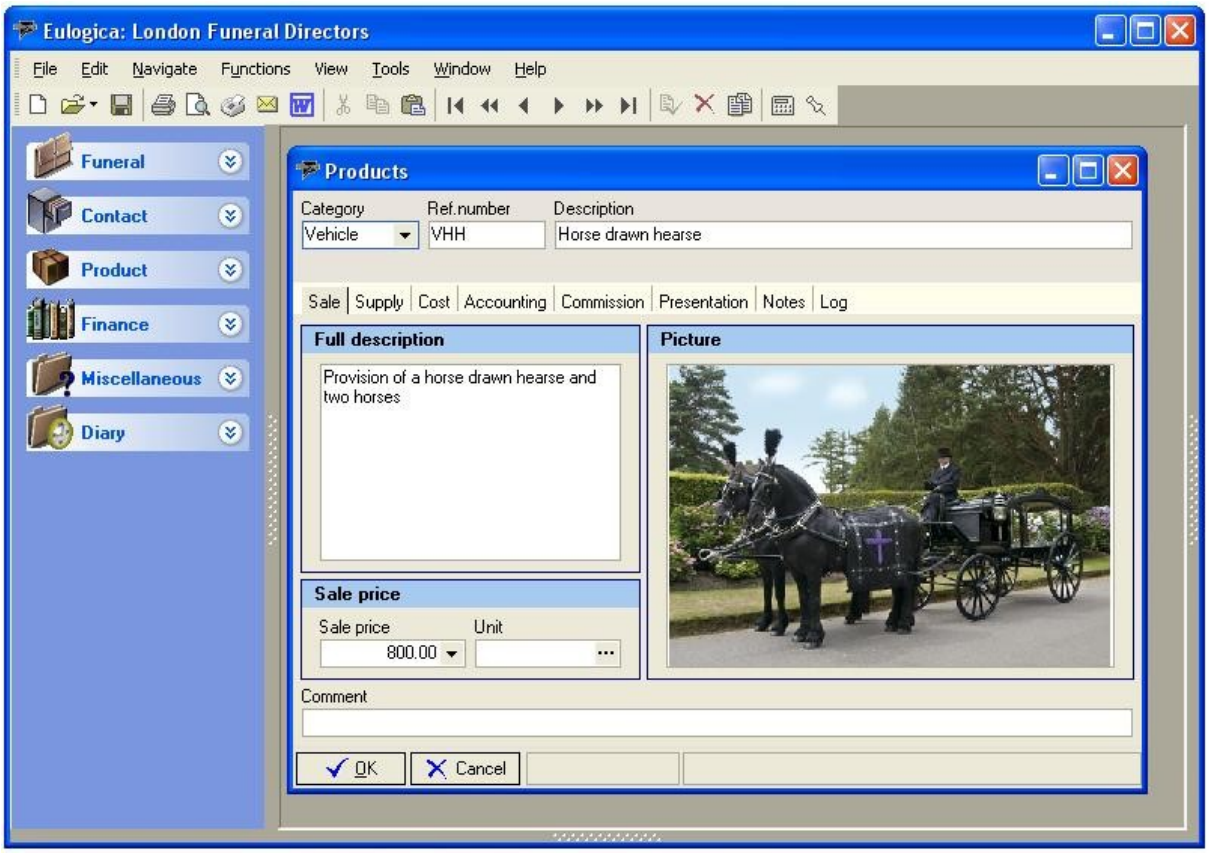
The sorting option will always revert to its default setting of **Reference number** the next time the product files are opened using the main menu.

*The screen shots below show the **Products** file sorted by Category and then filtered using the letter **'p'**. Only product categories staring with a 'P' are now displayed.*

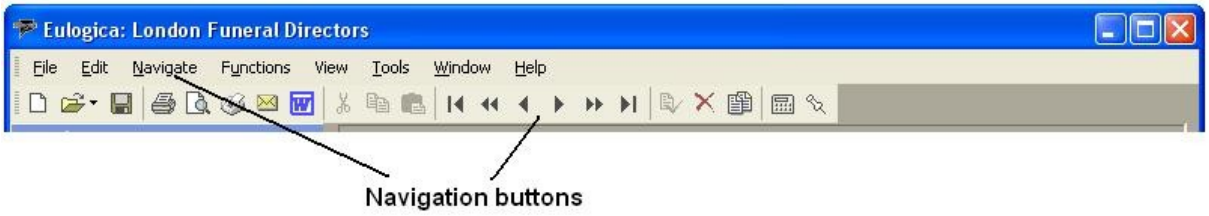


To select a particular product record to view simply double click the entry or highlight the entry and click **Open** in the bottom of the screen. This will then open that particular product record where all details can then be viewed. Some details are stored under the different tabs within the window and can be viewed by selecting the particular tab.

The screen shot below shows the Horse Drawn Hearse product record opened.



Once you are in an actual product record the **Navigation** buttons on the top menu can be used to move between records. The single left and right arrows move you 1 record either way. The double arrows move you 10 records either way and the arrows with the vertical line move you either to the beginning or the end of the products file. These buttons can be useful for browsing through product records.



F.3 Amending product records

It is vital to keep product records up to date. Product records are used to build up client invoices. To ensure that all staff are entering the correct product details with the minimum amount of manual intervention, it is important to keep things like prices up to date in the product files.

F.3.1 Adding product records

To add a product record you must first of all open up the product file. Click on **Product** in the main menu and then click on **Products**. This will then open up the product list. In the bottom menu click on the **New** button. This will then open a blank product record which can then be populated with data. There are different tabs for further information fields, but the main data is entered on the **Sale** tab. Details of the **Sale** tab data fields are given below.

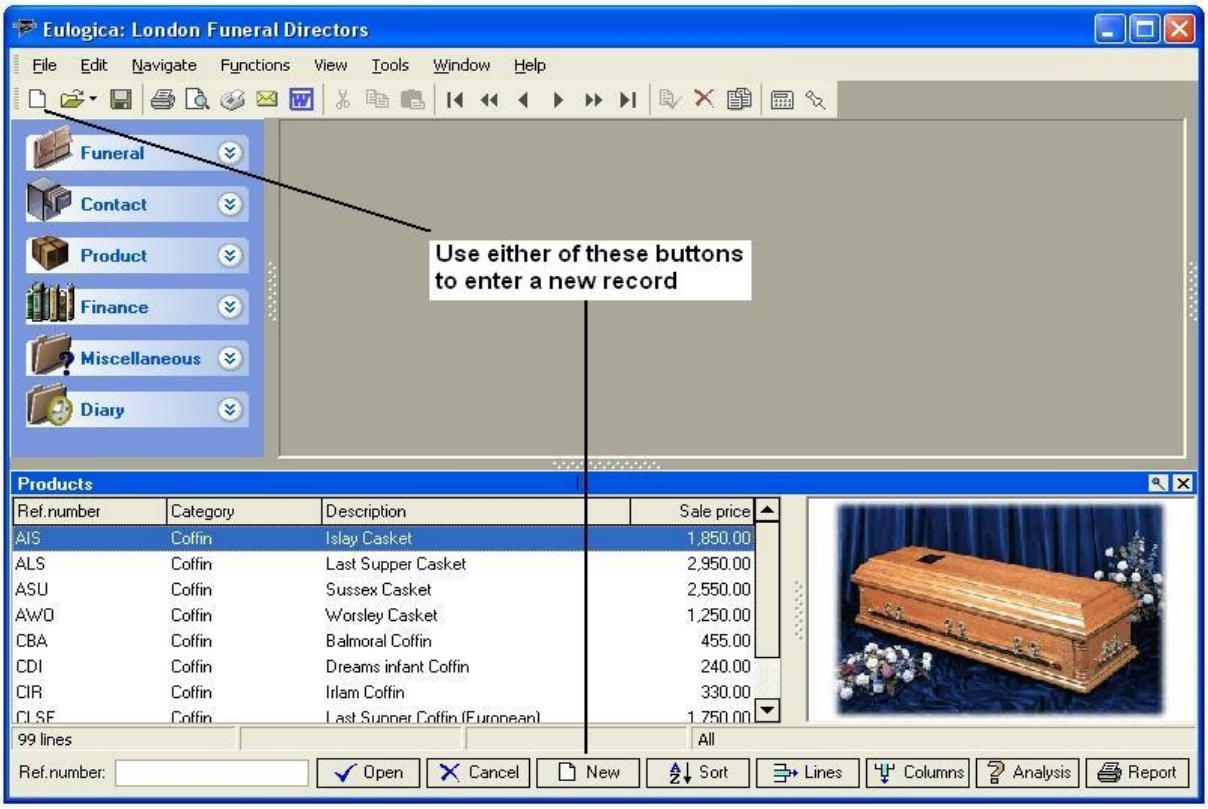
F.3.1.1Sale tab fields

•**Category:**	This is where you select which category you want a product to appear in. For example, you would put anything do with coffins in the **Coffin** category, whilst anything to do with vehicles would go in the **Vehicle** category. This will then dictate what products are shown in various data entry fields when adding a funeral.
•**Ref. number:**	The software will automatically generate a reference number but this can be manually over written, as long as each reference number is unique.
•**Description:**	A field for a short description of the product. This will be used to select the product when entering funeral details and will also be used on the wording for the invoice if no long description is present.
•**Full description:**	A more detailed description of the product can be entered here. This wording will then be used for the invoice.
•**Picture:**	A picture of the product can be entered here.
•**Sale price:**	The price that you will sell the item for.
•**Unit:**	Settings for some products may require the units to be changed. For example, for excess mileage the unit can be changed to miles.
•**Comment:**	Simply a comment box for internal reference only.

Once you have entered all the information click **Ok** in the bottom left hand corner of the window to close and save the new record. Further details can always be added at a later stage if so desired.

As well as using the **New** button in the bottom menu you can also use the **File | New** option from the top menu or the standard windows **New** icon, also in the top menu.

*The screen shot below shows the **Products** group opened with the various options shown for adding a new record.*



Tip: if you are entering a number of new product records, you can simply click either of the above options once you have completed a record. This will save the record you have just entered and open up a new blank record ready for data entry.

F.3.2 Editing product records

Editing / amending product records is very easy. Simply open up the contact record you wish to edit using **Product** from the main menu, then select the **Products** and finally open up the required record. Then simply make the necessary changes to the record. This may simply be changing the price or perhaps amending the wording for the invoice.

After you have made all the changes you can then either opt to save the changes or not save the changes.

Saving the changes. If you are happy with the changes made and wish to save these amendments click **Ok** in the bottom left corner of the window. The changes will be saved and the window closed. Anybody else opening that particular record will now see the record with the changes that have just been made.

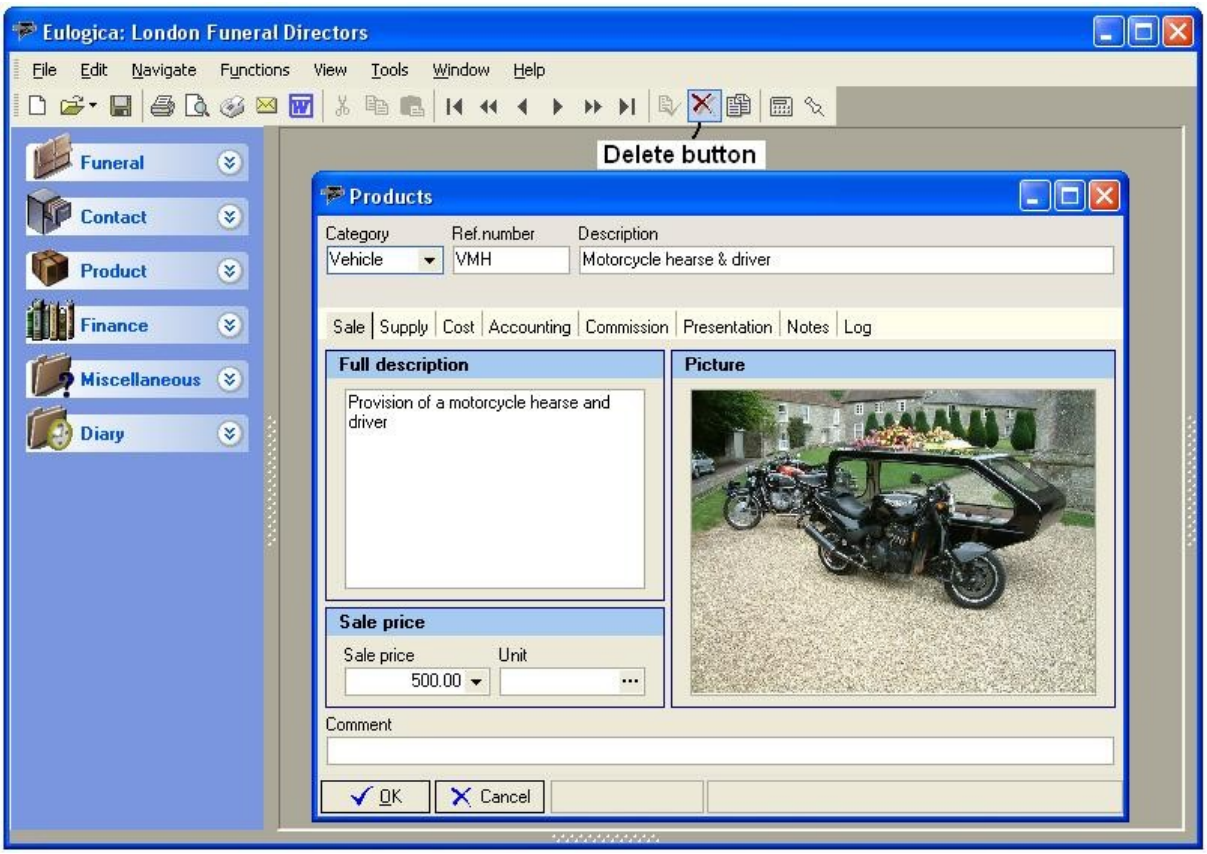
Not saving the changes. If you decide you don't want to save the changes you have just made then click the **Cancel** button in the bottom of the window. You will then be asked if you want to save the changes you have just made and be given 3 options.

- **Save changes in this window? Yes** – will save the changes and close the window.
- **Save changes in this window? No** – will NOT save the changes and close the window.
- **Save changes in this window? Cancel** – will NOT save the changes, but will allow you to carry on editing the data in the window.

F.3.3 Deleting product records

Product records can be deleted if so desired. This is useful if you no longer provide a particular product.

To delete a product record first of all open up the product record you wish to edit using **Product** from the main menu, then select the **Products** and finally open up the required record. If you are sure you wish to delete this record then click on the red **X** in the top menu.



Once you have clicked the **Delete** button you will then be asked to confirm that you really do want to delete this product record.

- Selecting **Yes** will delete the record.
- Selecting **No** will cancel the delete request and continue to show the record.

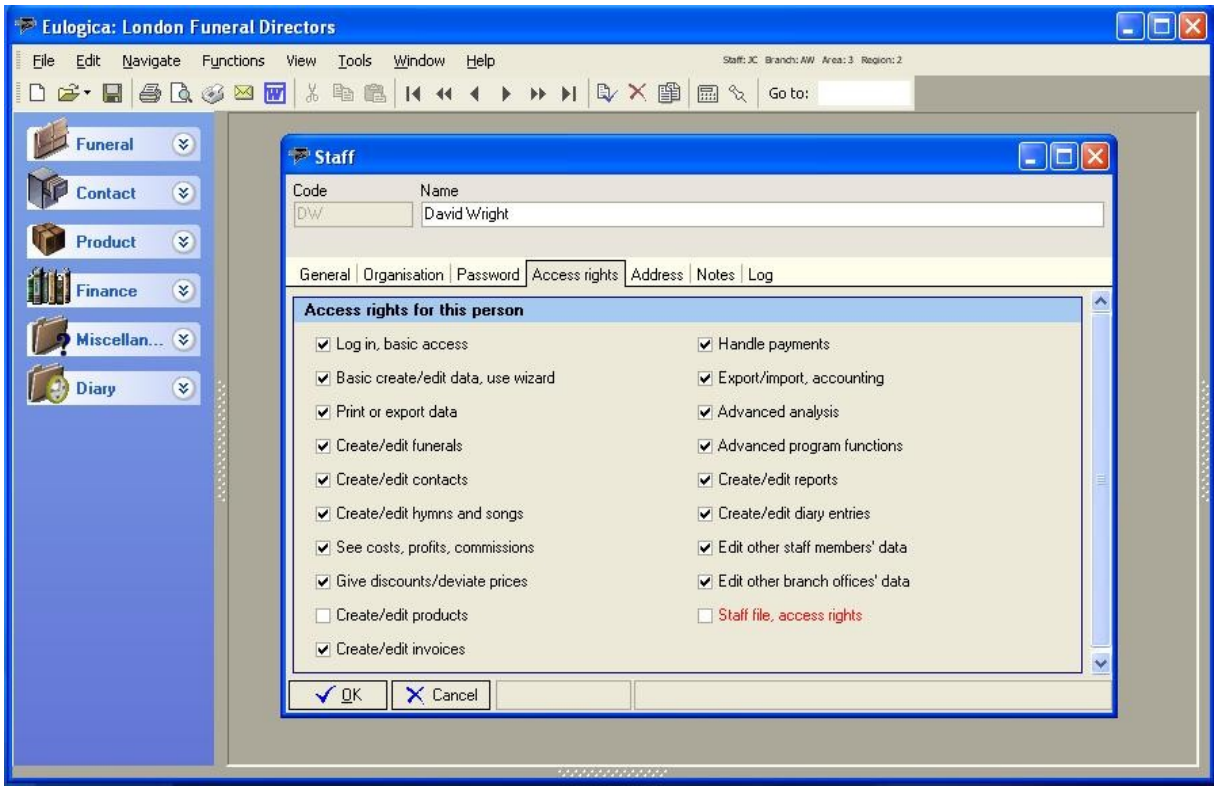
There is no undelete button so please ensure that you do really want to delete that record.

F.3.4 Create / Edit products access rights

Access rights for creating and editing products can be changed for individual members of staff. Staff can either be given the rights to add, edit and delete products or not. This is useful if you require only a few members of staff to be able to edit your companies product details.

This is achieved by selecting **Tools | Organisation | Staff** from the top menu and then opening the relevant staff member. Once you have opened the staff member file select the **Access rights** tab. You will then be presented with a screen where various different access rights can be changed. Look for the **Create / edit products** check box and either check to give rights to add, edit and delete products or uncheck to take away those rights. Once finished click **Ok** to save the changes and make them active.

The screen shot below shows access rights removed for adding, editing and deleting products for staff member David Wright.



F.4 Other useful fields

The **Organisation** tab allows products to be grouped under various headings. This allows for larger organisations to have different products only available in certain area's or region's. When displaying a list of products there are options available in the **Lines** menu to limit the list to only the most relevant records:

Mine
My branch
My area
My region
My brand
All

These options are all relative to the details of the logged in user's Staff record. Hence it is possible to see e.g. only the churches in one user's Area, or only the graveyards associated with the Region.

Please note, for all types of records, changing the **Branch code** will also change the **Area**, **Region**, and **Brand code**, if such links exist in the **Branch file**. Changing the **Area code** will also change the **Region** and **Brand code**, if such links exist in the **Area file**. Changing the **Region code** will also change the **Brand code**, if such links exists in the **Region file**.

There is also the **X**, **Y** and **Z groups**. These groups are mainly for use in the **Contact** files and are not implemented in the **Product** file.

Please see your software supplier for further advice on using the **Organisation** tab.

F.5 Printing product records

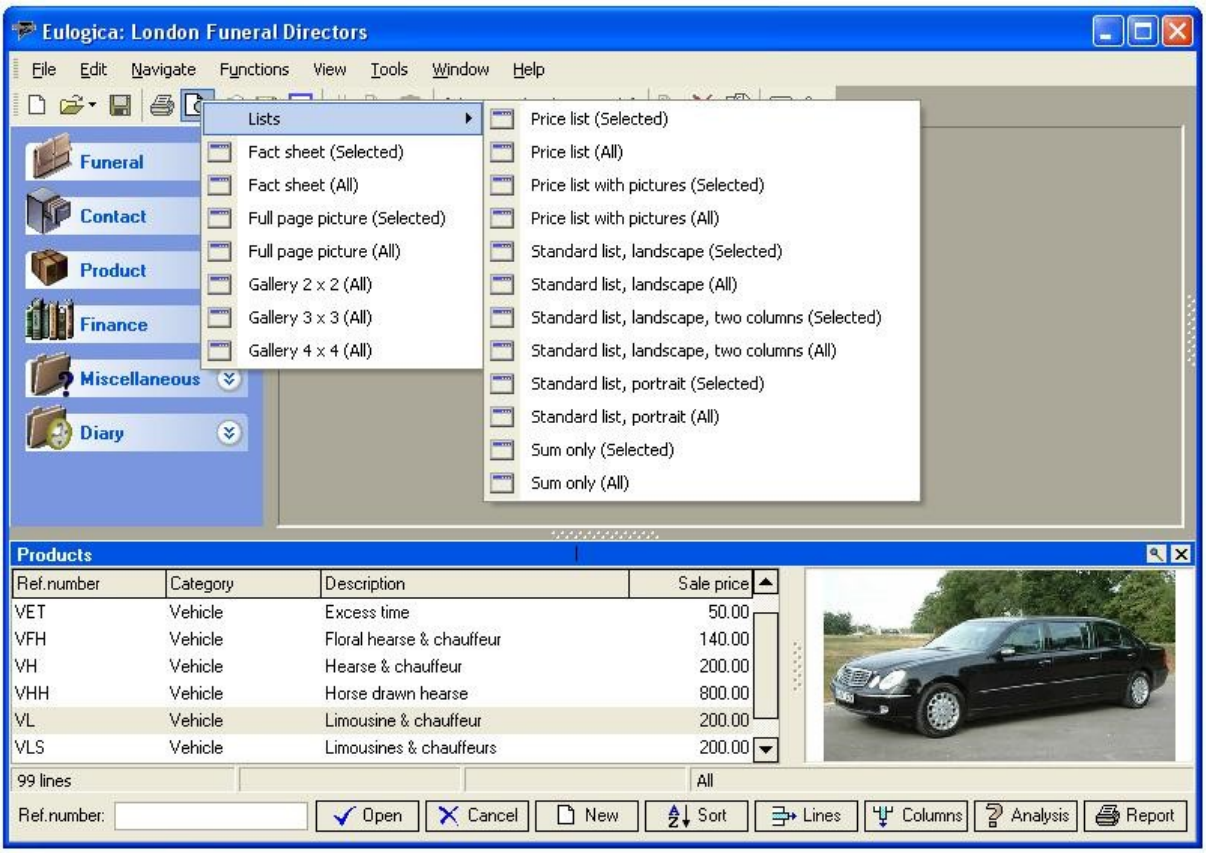
As well as viewing product details on screen, the product lists can also be printed. First of all open up the product list **Product** from the main menu and then selecting **Products**. This will then open up that list of products. Click once on any record within the list to highlight a record. It does not matter which record you highlight, unless you only want to print details for just one record.

Next use either the **Print** button or the **Print preview** button in the top menu. The **Print** button will send the document straight to the printer for immediate printing, whilst the **Print preview** button will give you an on screen display before you decide to print. On selecting either of these buttons you will be presented with the same options.

There are many options for printing the product lists, most of which are self explanatory. The options list are split into two sections. The first section is selected when pressing the **Print** or **Print preview** button. The second section (**Lists**), is then selected from the first section.

Some options have the word (**All**) and some have the word (**Selected**) after them. The (**All**) option will print all products in the product list, whereas the (**Selected**) option will only print the product highlighted in the product list.

The diagram below shows the two sections.

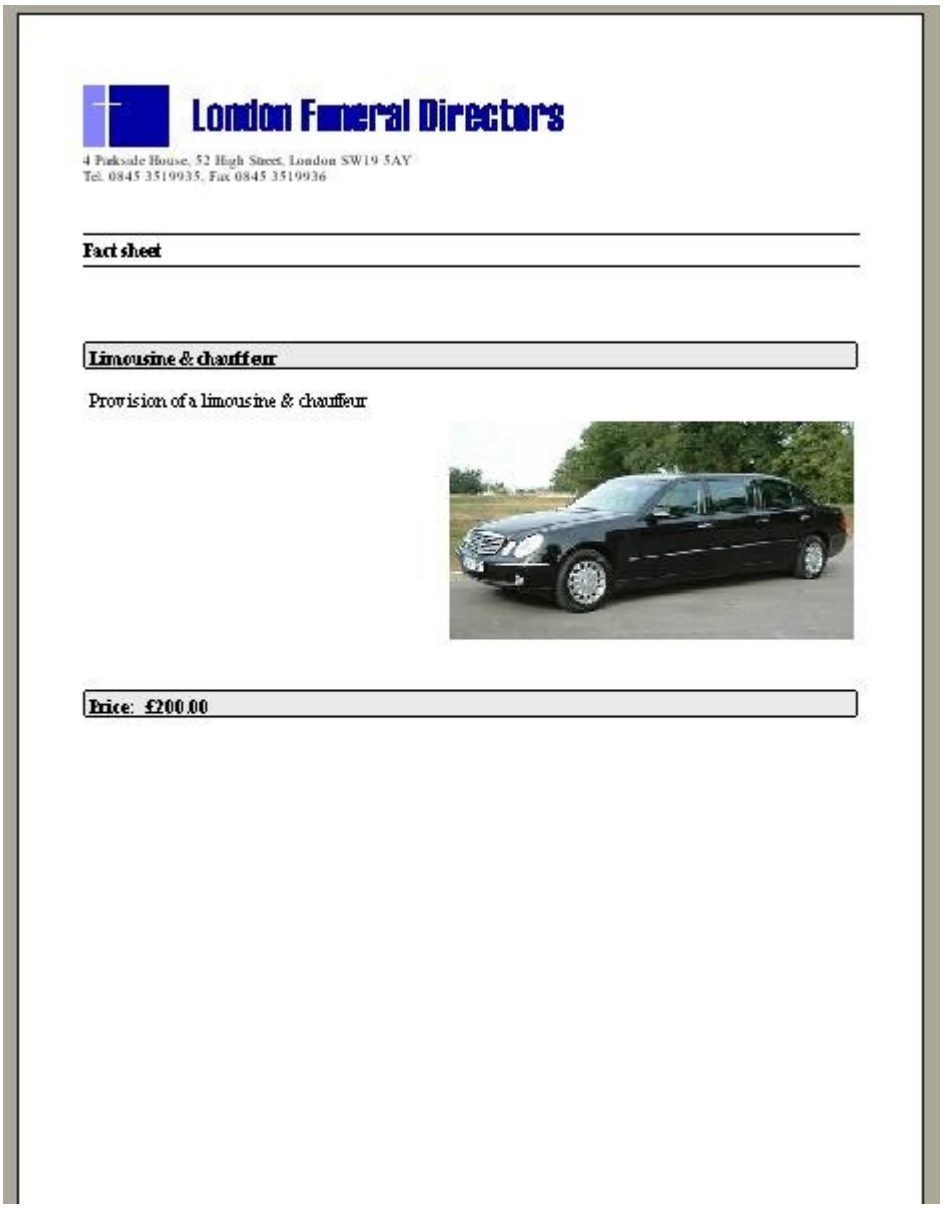


The first section includes the following options:

- **Fact sheet** — a print out of the product picture, description, full description and sale price.
- **Full page picture** — a full page print out of the product picture, description and sale price.
- **Gallery** — a number of product pictures, descriptions and sale prices on a single page (either 2 x 2 pictures, 3 x 3 pictures or 4 x 4 pictures).

The screen shots below show some examples of these print out options.

Fact sheet.



Gallery 2 x 2

Gallery 4 x 4

The second section (**Lists**) gives you various options to print out the product list with different columns and in different formats. For example, you can print a standard list, which includes Reference number, Category, Description and Sale price, in many different formats.

*The screen shots below shows the **Standard list, landscape (All)** option.*

Products

Ref number	Category	Description	Sale price
AIS	Coffin	Islay Casket	£1,850.00
ALS	Coffin	Last Supper Casket	£2,950.00
ASU	Coffin	Sussex Casket	£2,550.00
AWO	Coffin	Worsley Casket	£1,250.00
CBA	Coffin	Balmoral Coffin	£455.00
CDI	Coffin	Dreams infant Coffin	£240.00
CIR	Coffin	Irlam Coffin	£330.00
CLSE	Coffin	Last Supper Coffin (European)	£1,750.00
CLST	Coffin	Last Supper Coffin (Traditional)	£1,700.00
CMA	Coffin	Marlborough Coffin	£800.00
CRE	Coffin	Regency Coffin	£590.00
CSN	Coffin	Snowden Coffin	£780.00
CWO	Coffin	Woodlands Coffin	£800.00
CYO	Coffin	York Coffin	£395.00
D	Disb	Disbursement	£0.00
DBLG	Disb	Brick lined grave	£0.00
DC	Disb	Church fee	£0.00
DCE	Disb	Cemetery fee	£0.00
DCM	Disb	Church/minister and travelling fee	£150.00
DCR	Disb	Crematorium fee	£0.00
DD	Disb	Doctors fees for Cremation Certificates	£111.00
DGP	Disb	Grave preparation	£50.00
DICR	Disb	Interment of Cremated Remains	£0.00
DMI	Disb	Minister and travelling fee	£100.00
DVE	Disb	Verger fee	£50.00
FCP	Flower	Petite Cross	£75.00
FDH	Flower	Double heart	£140.00
FHPW	Flower	Peach And White Heart	£95.00
FHR	Flower	Red heart	£75.00

London Funeral Directors

*The screen shot below shows the **Price list with pictures (All)** option.*

Price list

Ref.	Description	Price
AIS	Islay Casket	£1,850.00
ALS	Last Supper Casket	£2,950.00
ASU	Sussex Casket	£2,550.00
AWO	Worsley Casket	£1,250.00
CBA	Balmoral Coffin	£455.00
CDI	Dreams infant Coffin	£240.00
CIR	Irlam Coffin	£330.00
CLSE	Last Supper Coffin (European)	£1,750.00
CLST	Last Supper Coffin (Traditional)	£1,700.00
CMA	Marlborough Coffin	£800.00

*The screen shot below shows the **Standard list, portrait (All)** option.*

Products

Ref number	Category	Description	Sale price
AIS	Coffin	Islay Casket	£1,850.00
ALS	Coffin	Last Supper Casket	£2,950.00
ASU	Coffin	Sussex Casket	£2,550.00
AWO	Coffin	Worsley Casket	£1,250.00
CBA	Coffin	Balmoral Coffin	£455.00
CDI	Coffin	Dreams infant Coffin	£240.00
CIR	Coffin	Irlam Coffin	£330.00
CLSE	Coffin	Last Supper Coffin (European)	£1,750.00
CLST	Coffin	Last Supper Coffin (Traditional)	£1,700.00
CMA	Coffin	Marlborough Coffin	£800.00
CRE	Coffin	Regency Coffin	£590.00
CSN	Coffin	Snowdon Coffin	£780.00
CWO	Coffin	Woodlands Coffin	£800.00
CYO	Coffin	York Coffin	£395.00
D	Disb	Disbursement	£0.00
DBLG	Disb	Brick lined grave	£0.00
DC	Disb	Church fee	£0.00
DCE	Disb	Cemetery fee	£0.00
DCM	Disb	Church/minister and travelling fee	£150.00
DCR	Disb	Crematorium fee	£0.00
DD	Disb	Doctors fees for Cremation Certificates	£111.00
DGP	Disb	Grave preparation	£50.00
DICR	Disb	Interment of Cremated Remains	£0.00
DMI	Disb	Minister and travelling fee	£100.00
DVE	Disb	Verger fee	£50.00
FCP	Flower	Petite Cross	£75.00
FDH	Flower	Double heart	£160.00
FHPW	Flower	Peach And White Heart	£95.00
FHR	Flower	Red heart	£75.00
FHWP	Flower	White And Pink Heart	£120.00
FPD	Flower	Personal Tribute Dad	£130.00
FPM	Flower	Personal Tribute Mum	£130.00
FPPL	Flower	Pink And Lilac Posy	£45.00

Please note that the product list will be printed in the order shown on screen. The default sort option is by Reference number, so this is how the list will be printed if no further action is taken. If you ask the software to sort on a different field then this is how the list will then be printed. Also, if you filter the list down to Reference numbers starting with the letter 'S', then the way the list appears on screen will be the way it is printed.

Further details on the various printing options can be found in the Printing section.

G Funerals

G.1 Introduction

The Funeral section of Eulogica is where you add in details of funerals, sundry orders, coroners removals, pre-paid funerals etc. The list of options under the Funeral category in the main menu will vary depending upon your companies individual installation. For example, you may or may not have a coroners removal section depending on whether or not you need this option.

To see the list of options available select **Funerals** in the main menu.

Below is a quick discussion of a selection of common files:

Sundry orders provides a separate file to record any additional work which is not part of a funeral. This may be work carried out for a client after a funeral has been invoiced. For example, the client may not have decided what to do with their loved ones cremated remains at the time of invoicing the funeral. Once this additional work has been carried out then a sundry order can be produced. You can also link a sundry order with a funeral order. This allows quick entry of names and addresses etc without having to enter all the details in again. Sundry orders may also be used for other miscellaneous orders, for example, the hire out of a limousine to another funeral director.

Removals provides a separate file to record and process removal operations that are not part of an actual funeral. This will be relevant for any Funeral Director who handles removals on behalf of hospitals, police, coroner, etc, or for another funeral business. This file should not be used for removals that are part of full funerals, as there is also a removal function in the main funeral window.

Floral Tributes provides a file to record clients' orders for Floral Tributes, typically in connection with full funerals, but ordered and paid for separately. When creating such an order, it is good practice to connect it to the main funeral – this will give a better overview later. This file should not be used for flowers that are ordered together with a main funeral, as there is also a Floral Tribute function in the main Funeral window.

Memorial masonry provides a file to record orders for memorial masonry, possibly connected to a funeral, but after the main funeral has been invoiced. Of course this file is also useful for any totally separate sales of masonry. It is not necessary to use this file for work that is part of a main funeral and ordered together with the actual funeral as there is also a Memorial masonry function in the main Funeral window.

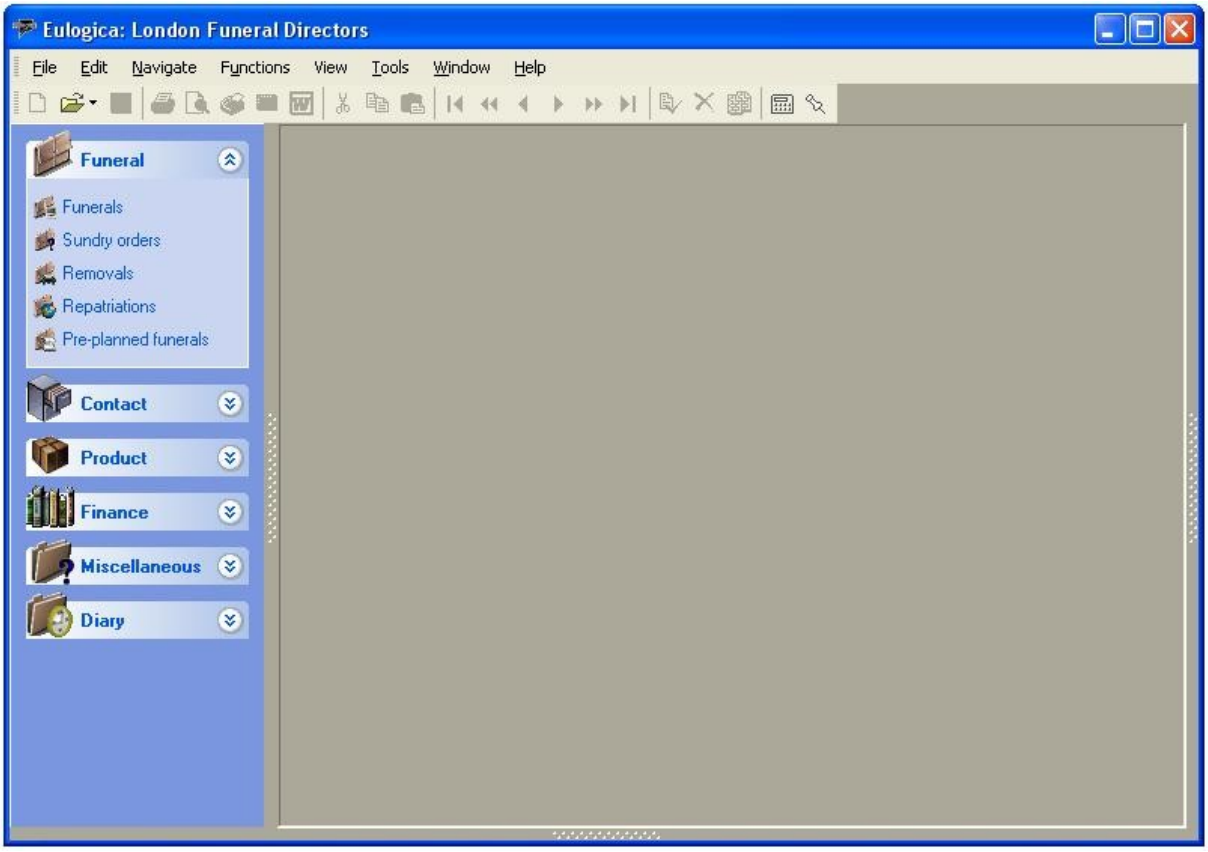
Repatriations provides a file to record export or import operations that are not full funerals. This will be relevant for companies that do repatriation work on behalf of other Funeral Directors. For a full funeral that is also a repatriation (with coffin, hearse etc) the main funeral file should be used, as it can also offers repatriation functionality (depending upon your particular configuration.

G.2 Accessing funeral records

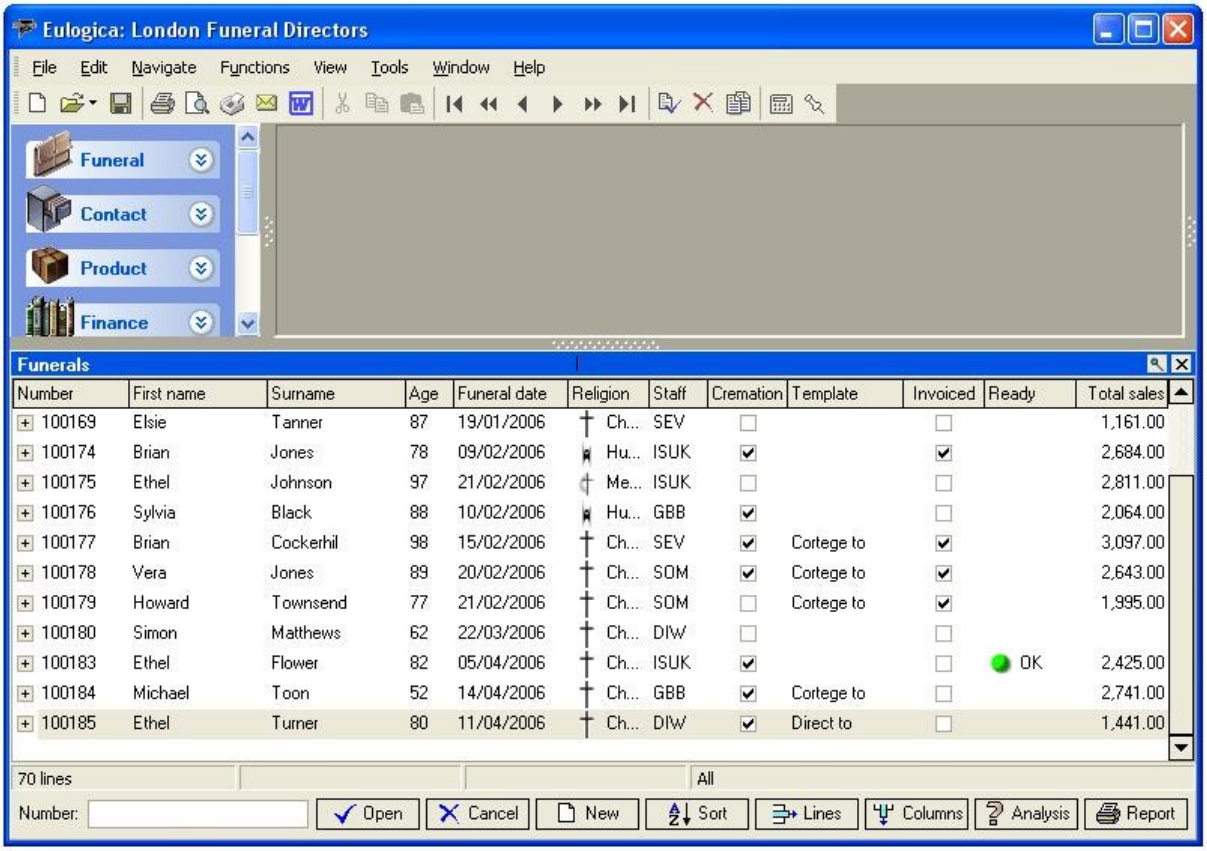
To access a particular funeral record first of all select **Funeral** in the main menu. You will then be presented with a list of the various funeral groups that have been set up for you. Simply click on the group you require to open those files. This section will focus on **Funerals** records, but all other options work in the same manner (the records are simply stored in a different area).

Once you click on the contact group you require, a window will appear towards the bottom of the screen with a list of those particular files. This window can be resized by clicking and dragging the dotted zone located in the middle of the top of the window. Clicking once on the dotted zone will shrink the window down to the bottom of the screen. To reopen the window simply click on the dotted zone again which is now located right at the very bottom of the screen.

*The screen shot below shows the **Funeral** list opened. In this particular example the options are **Funerals, Sundry orders, Removals, Repatriations** and **Pre-planned funerals**.*



*The screen shot below shows the **Funerals** files opened.*



The funeral records can be scrolled up and down using the mouse and scroll bar, the cursor keys on the keyboard or the navigation buttons in the top menu. To select a particular funeral record to view simply double click the entry or highlight the entry and click **Open** in the bottom of the screen. The number of funeral records in the file is shown in the bottom left hand corner of the screen. In the previous screen shot it showed 70 lines, indicating 70 records.

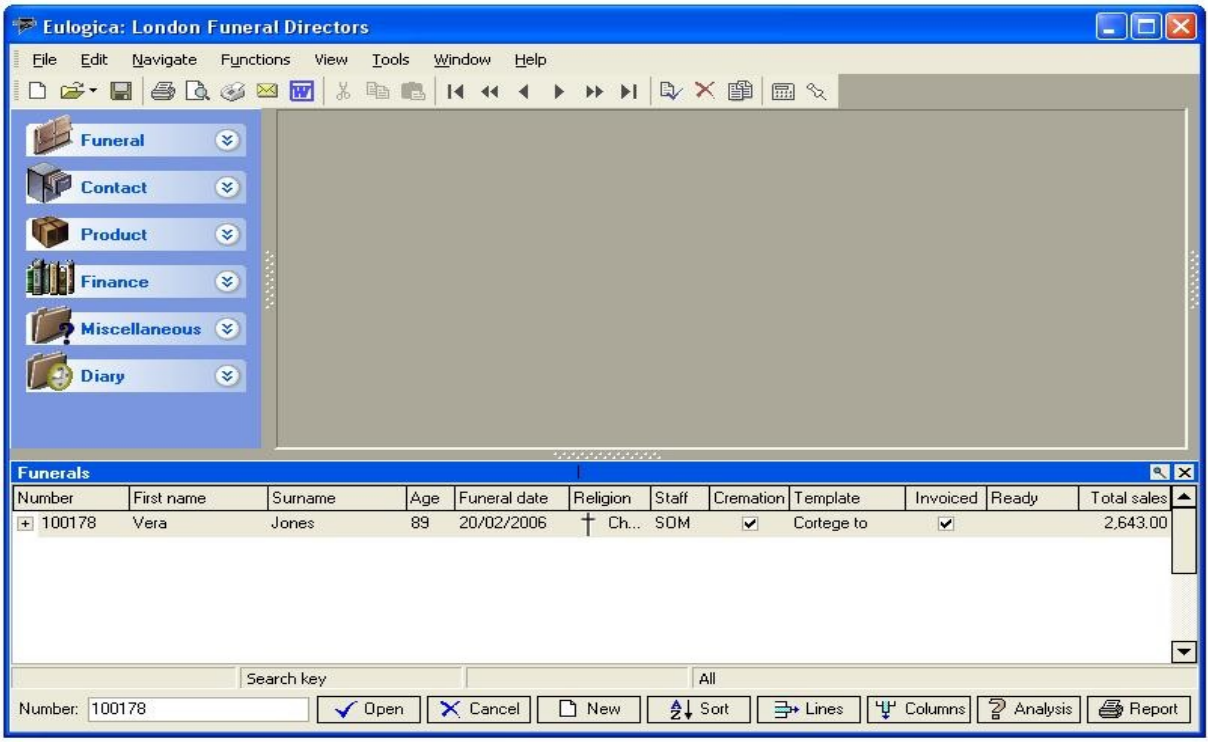
Where there are many funeral records, you can filter the records down to make it easier to find the one you are looking for. By default the funeral records are sorted in Number order. You will see in the bottom left hand corner of the screen that there is a box titled **Number**. Here you can type in the number of the funeral record you are looking for and the records will be filtered out. You must type in the full funeral reference number for the record to be filtered.

It is also possible to sort the funeral records in many other ways. To achieve this click on the **Sort** button in the bottom menu and select how you want to sort the records. Once you have selected your new option, the title of the filter box in the left hand corner will reflect this. The records will now be sorted under the heading you have chosen and if you type anything in the filter box it will be actioned on the new sort option.

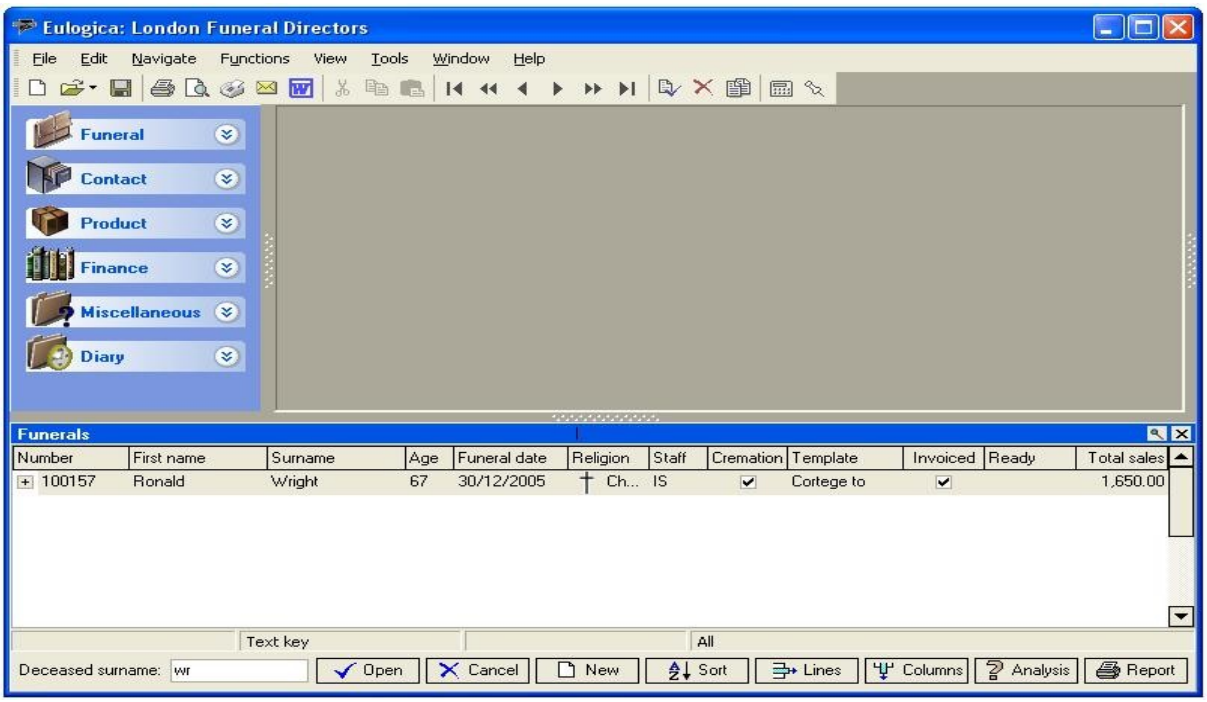
To clear the filter simply delete the text entered into the filter box.

The sorting option will always revert to its default setting of **Number** the next time the funeral files are opened using the main menu.

*The screen shot below show the **Funeral** list with the reference number '100178' typed in the Number box.*

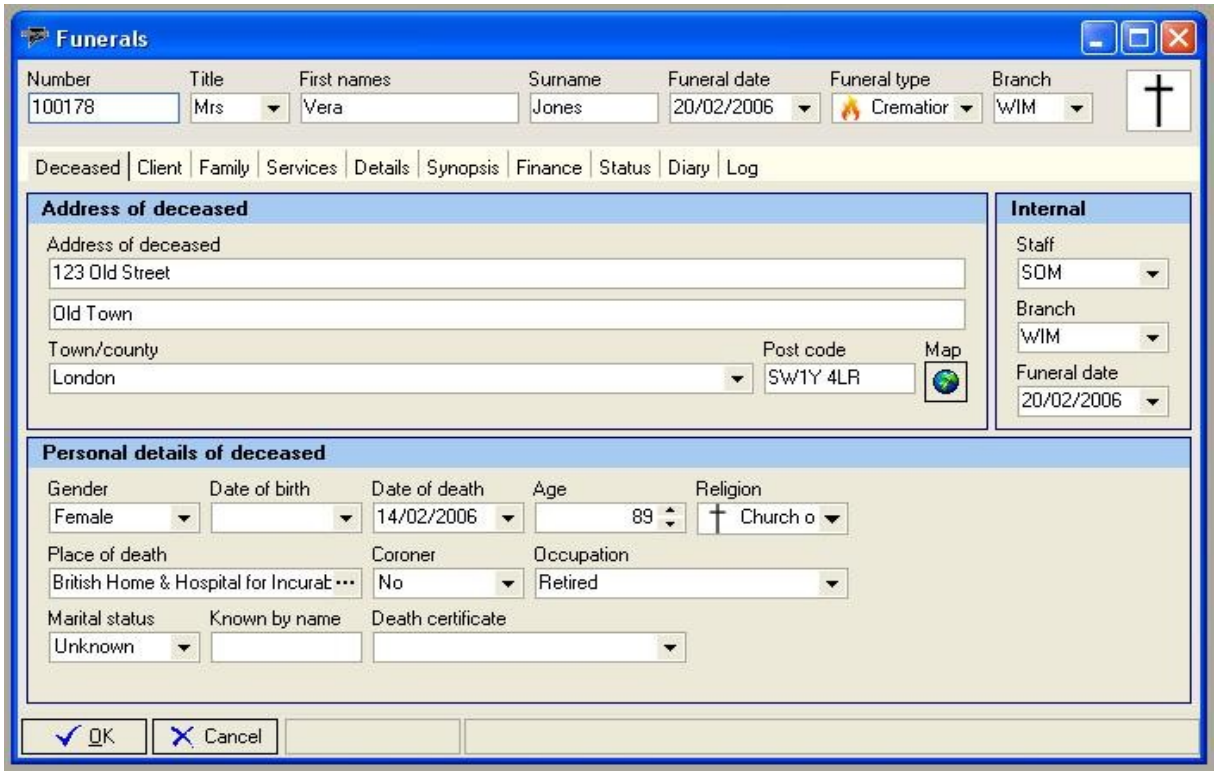


*The screen shot below shows the **Funeral** list with the **Sort** option set to 'Deceased surname' and the letters '**wr**' typed in the filter box. Only records where the deceased's surname begin with the letters 'Wr' are now shown (this box is not case sensitive).*



To select a particular funeral record to view simply double click the entry or highlight the entry and click **Open** in the bottom of the screen. This will then open that particular funeral record where all details can then be viewed. The funeral record window is split up into different tabs to accommodate all the various data fields.

*The screen shot below shows a **Funeral** record window opened up.*



G.3 Amending Funeral records

G.3.1 Introduction

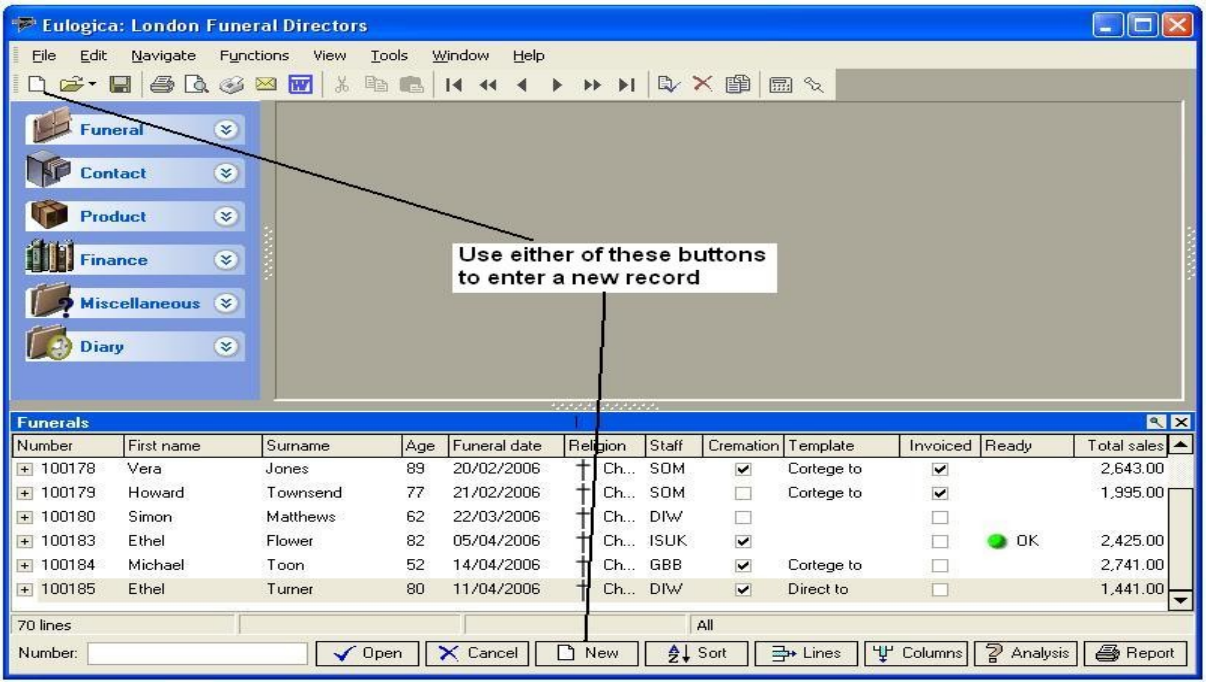
Obviously you will need to add new funeral records as funeral orders are taken as well as updating funeral records as further information is gathered. Occasionally you may also need to delete a particular funeral record from your system. This section looks at the basic steps required to perform all these actions.

G.3.2 Adding Funeral records

To add a funeral record you must first of all open up the funeral group where you want to add the record. Click on **Funeral** in the main menu and then click on **Funerals (**as we are focusing on funerals in this section). This will then open up the funeral list. In the bottom menu click on the **New** button. This will then open a blank funeral record which can then be filled in. The funeral window has various tabs for all the different fields required.

Once you have completed entering the funeral details, or as many of the funeral details you have at this time, click **Ok** in the bottom left hand corner of the window to close and save the new record. Further details can always be added at a later stage.

The screen shot below shows the various options for adding a new funeral record.



G.3.3 Editing Funeral records

Editing / amending funeral records is very easy. Simply open up the funeral record you wish to edit using **Funeral** from the main menu, then select the **Funerals** and finally open up the required funeral record. Then make the necessary changes to the record.

After you have made all the changes you can then either opt to save the changes or not save the changes.

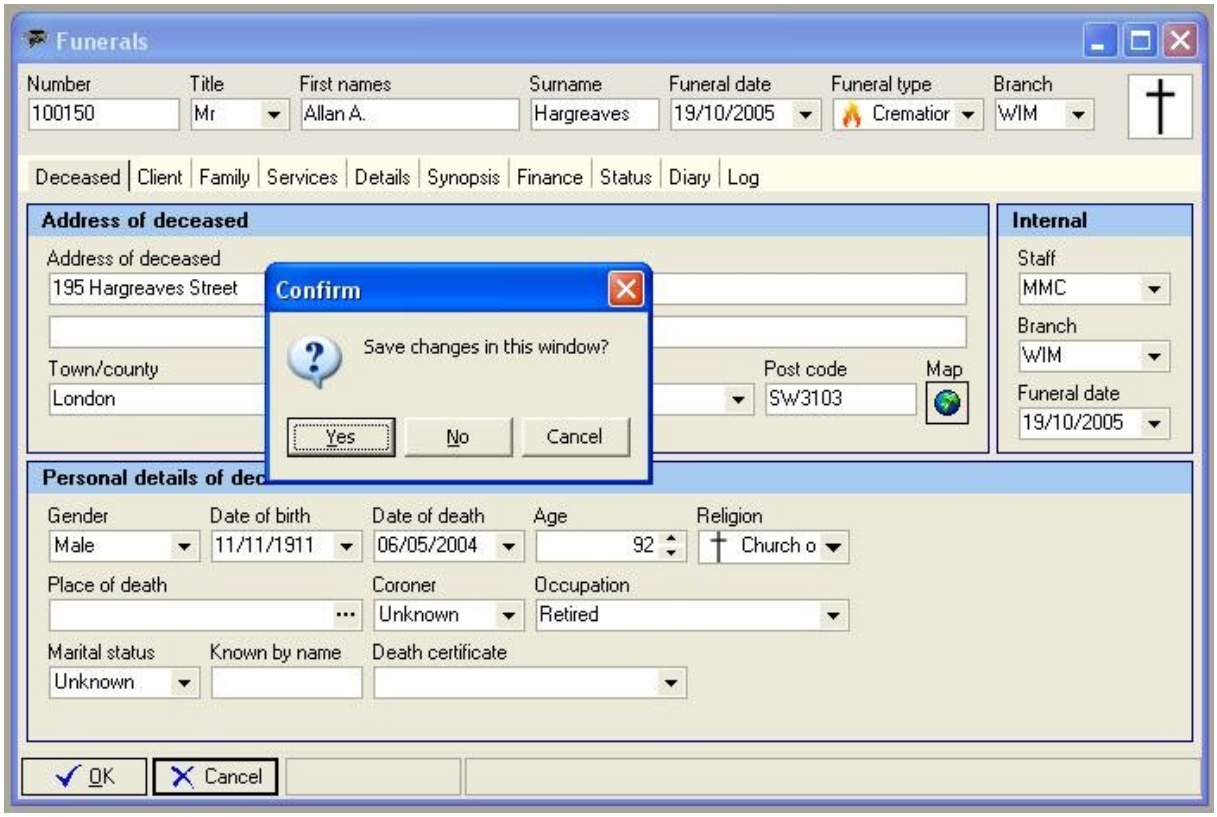
- **Saving the changes.** If you are happy with the changes made and wish to save these amendments click **Ok** in the bottom left corner of the window. The changes will be saved and the window closed. Anybody else opening that particular funeral record will now see the record with the changes that have just been made. If you have made changes that affect the diary, then the diary will also be updated.

- **Not saving the changes.** If you decide you don't want to save the changes you have just made then click the **Cancel** button in the bottom of the window. You will then be asked if you want to save the changes you have just made and be given 3 options.

  - **Save changes in this window? Yes** – will save the changes and close the window.

  - **Save changes in this window? No** – will NOT save the changes and close the window.

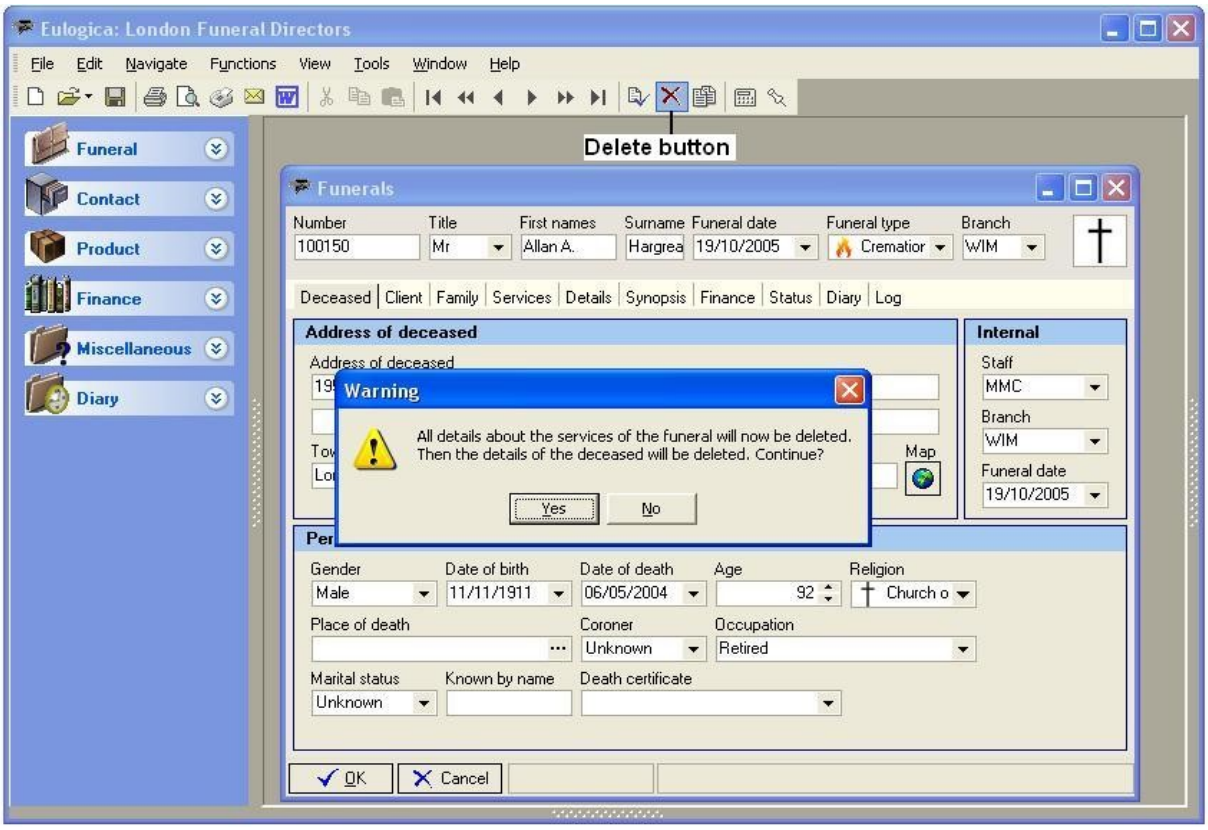
  - **Save changes in this window? Cancel** – will NOT save the changes, but will allow you to carry on editing the data in the window.



G.3.4 Deleting Funeral records

If you really need to, the Funeral records can be deleted. The software does not have a limit to how many funeral records can be stored and it is NOT necessary to remove funeral records.

To delete a funeral record first of all open up the record you wish to edit using **Funeral** from the main menu, then select **Funerals** and finally open up the required record. If you are sure you wish to delete this record then click on the red **X** in the top menu.



Once you have clicked the **Delete** button you will be given a warning that you are about to delete all details about the services for this funeral and that the details of the deceased will also be deleted.

- Selecting **Yes** will delete the record.
- Selecting **No** will cancel the delete request and continue to show the record.

Confirming **Yes** in the previous stage will produce a **FINAL** confirmation that you want to delete the record.

- Selecting **Yes** will delete the record completely – there will be no more warnings.
- Selecting **No** will cancel the delete request and continue to show the record.

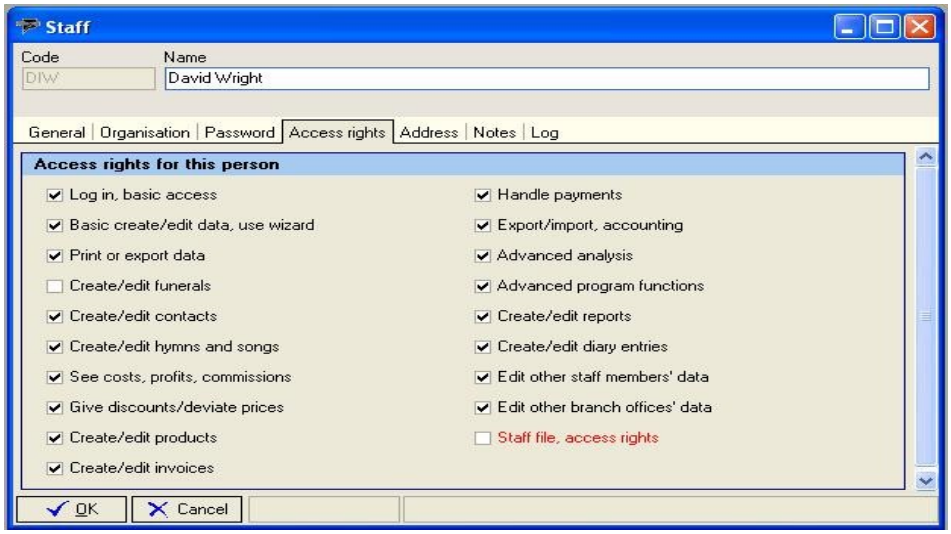
There is no undelete button so please ensure that you do really want to delete that record.

G.3.5 Create / Edit funerals access rights

Access rights for creating and editing funerals can be changed for individual members of staff. Staff can either be given the rights to add, edit and delete funerals or not. This option can be useful if you require some staff to only have access to view funeral records.

This is achieved by selecting **Tools | Organisation | Staff** from the top menu and then opening the relevant staff member. Once you have opened the staff member file select the **Access rights** tab. You will then be presented with a screen where various different access rights can be changed. Look for the **Create / edit funerals** check box and either check to give rights to add, edit and delete funerals or uncheck to take away those rights. Once finished click **Ok** to save the changes and make them active.

The screen shot below shows access rights removed for adding, editing and deleting funerals for staff member David I. Wright.



G.4 Printing from Funeral records

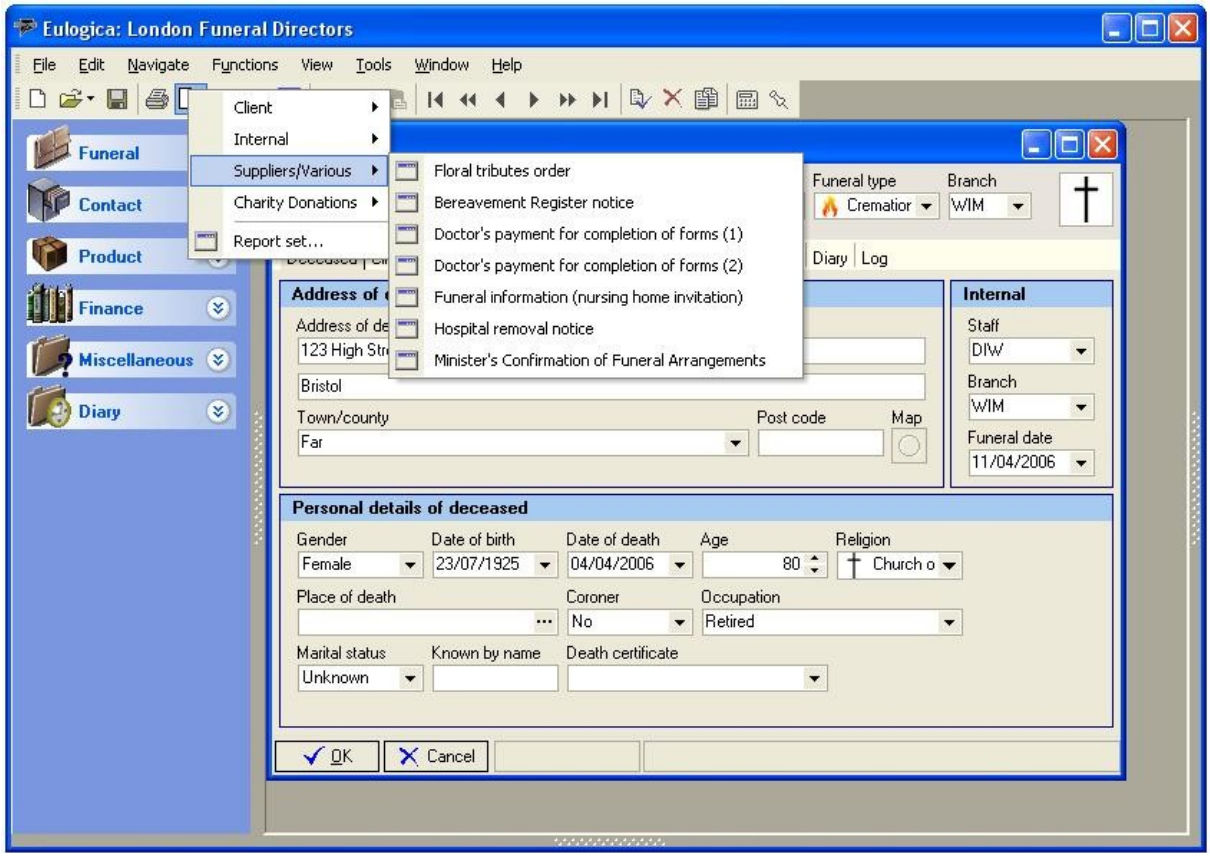
After entering all the funeral details you will obviously want to generate various documents for printing. This section provides an overview of printing funeral documents from a funeral record.

First of all open up the funeral record required by selecting **Funeral** from the main menu and then selecting **Funerals**. Open up the funeral record you wish to generate documents for.

Next use one of the print options in the top menu. For immediate printouts use the **Print** button which will send the document straight to the printer. For an on screen display of the document before printing use the **Print preview** button which will give you an on screen display before you decide to print. You can also use the **E-mail**, **Fax** or **Word** button options. On selecting any of these buttons you will be presented with the same options but will output the document in different ways.

The options for printing will vary for each funeral depending on what sort of funeral it is and what services have been added. For example, if you added the Charity donations service in the funeral then you will be given the option to printout various letters to do with charity donations. If you didn't select this service then you will not be given any print options to do with charity donations.

The screen shot below shows the print preview button selected and the various options available.



Further details on the various printing options can be found in the Printing Options section.

H Funeral window

H.1.1 About the window

In the top of the window you will discover a small number of fields that relate to the identification of the funeral. Generally the funeral reference number and the name of the deceased will be found here. The selection of fields is customisable, so you might find other fields on your screen, for example a staff code. The religious symbol in the upper-right corner is simply a reminder of the religion associated with the deceased. (The religion can be selected near the bottom of this window in the Personal details of the deceased.)

The fields in the top of the window stay fixed while the contents of the window are organised into pages, selected with tabs at the top of each page. Just click on the keywords **Deceased**,, **Client, Family** and so on to see the various pages.

Please notice the **OK** and **Cancel** buttons in the bottom of the window. The rule is that you should press **OK** when you are done with the entire window, and want to close it and save your changes. You can click Cancel to close without saving. Clicking the **X** in the right corner of the window has the same meaning as clicking **Cancel**.

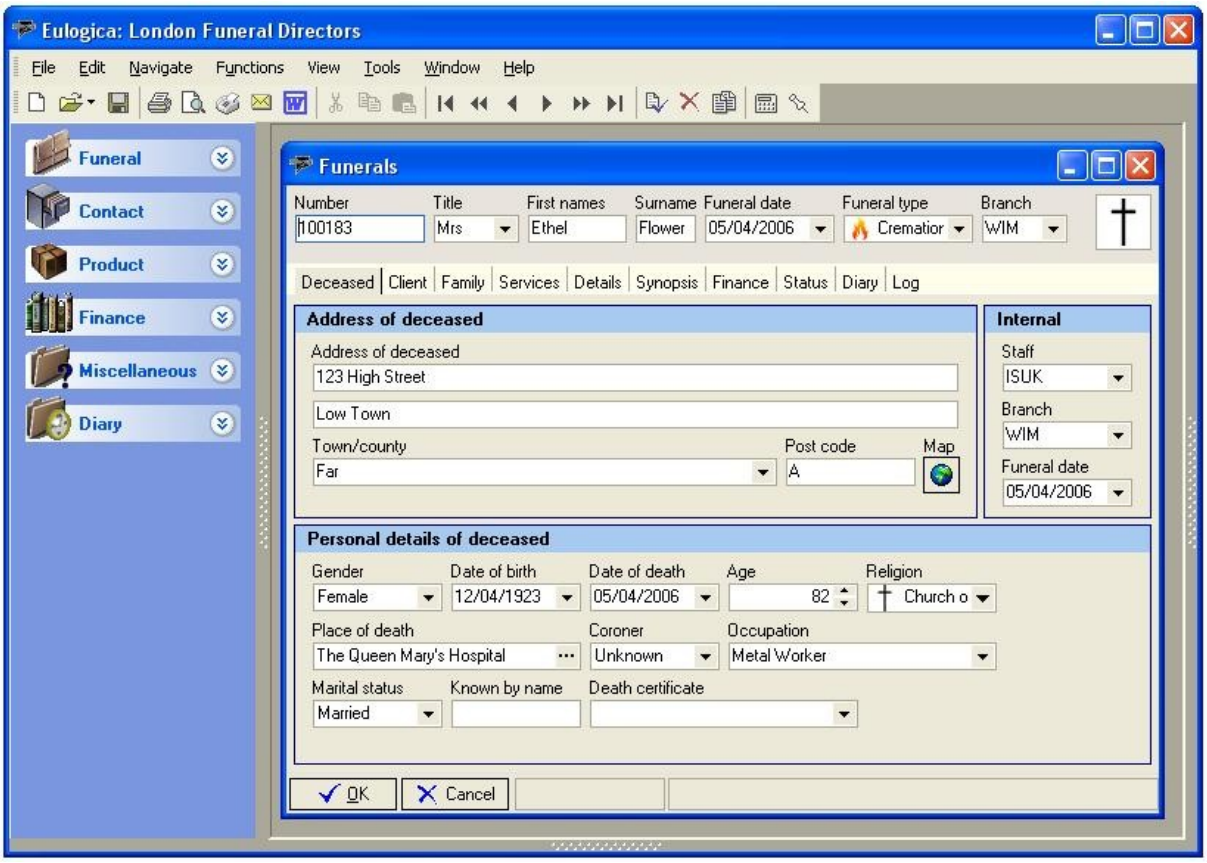
Please note that in order to go from one tab to the next, **OK** should not be clicked. If you want to save your work to the computer's hard disk at any particular stage, click the diskette symbol on the tool bar in the top left corner of the main window. There is generally no need to save your work like this, however, as it is frequently saved automatically anyway.

To move between fields on any page you can either use the mouse to click in the field or use the 'Tab' key to move to the next field.

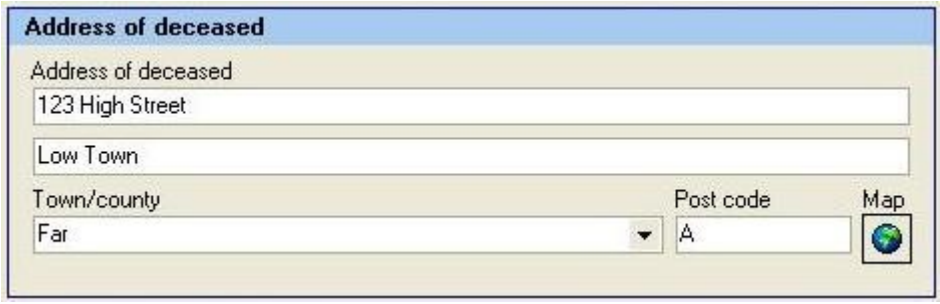
Finally, be advised that the size of the funeral window may be changed. Just use the mouse to drag the edges. The content will adapt, and for some of the pages, it is beneficial to use a larger window.

H.1.2 The Deceased page

The first page/tab you will see in the Funeral window contains information about the deceased. In the example shown below there are 3 sections to this page, *Address of deceased*, *Personal details of deceased* and *Internal*. These fields are configurable and may not appear exactly the same on your screen. The fields within each section are also configurable so these may also differ from what you see on your screen.



Address of deceased is self explanatory. The first 2 lines are simply entered by typing in the details. The third line you can either type in the *Town/county* or you can use the drop down selection box by clicking the down arrow at the end of the box. This will give you a few options of various towns and counties. This selection box can be edited. The *Post code* box is where you fill in the post code part of the deceased address. If the <u>full</u> post code is entered then the small world icon under *Map* will appear. If you have Internet access this will allow you to click on the world icon which will then open your Internet browser, for example, Microsoft Internet explorer, which will then give you a map of the address. Please note that unless a full post code is entered the map feature will not give you a correct map. If no post code is entered then the world icon will be greyed out and unusable.

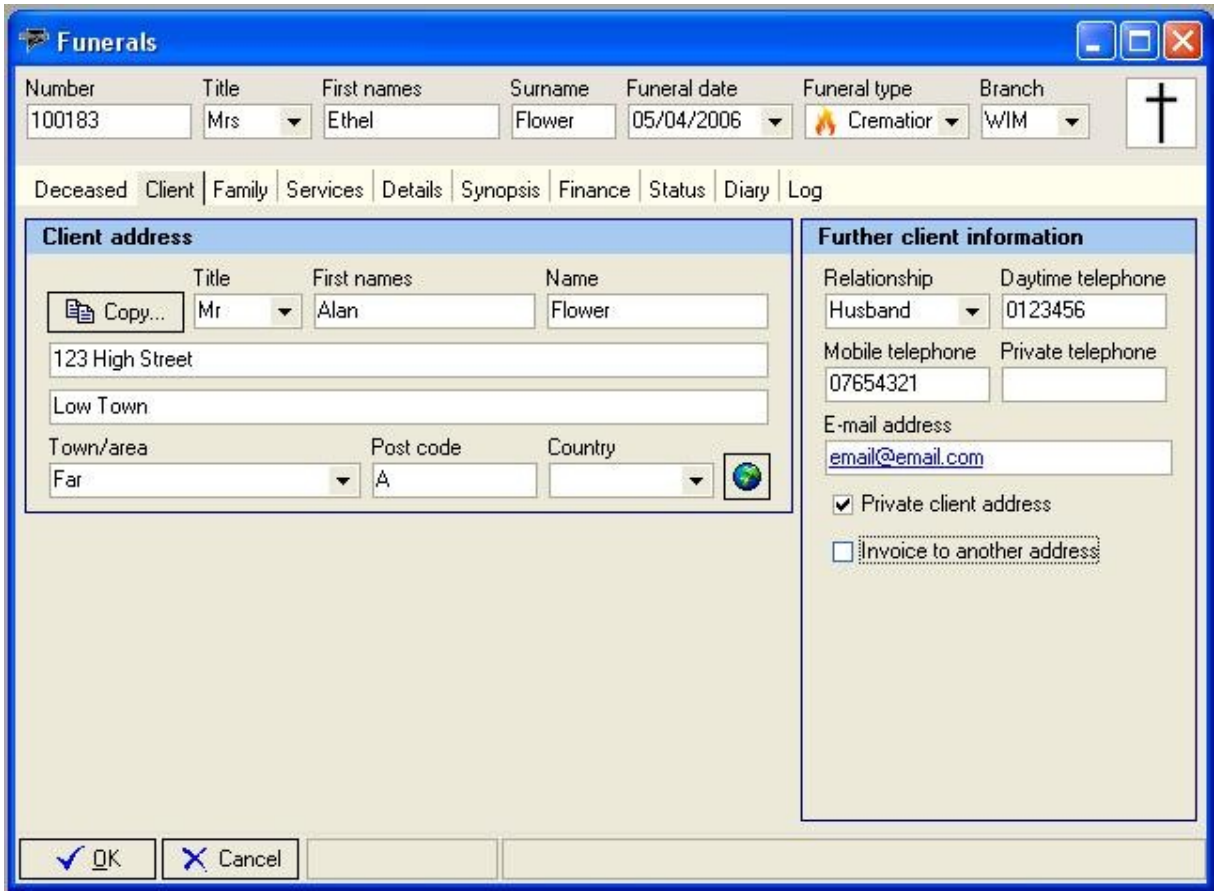


Personal details of deceased is also fairly self explanatory. Again, these fields are configurable and may be slightly different to what you see on your screen. Where fields have a small down arrow at the end of the box, they are generally selection boxes. For example, *Gender* and *Marital status* are simple selection fields. The occupation field you can either type in the occupation or select from the most

common *Occupations* using the small down arrow. The *Date of death* field can be entered in two different ways. You can either type the date of death in the following format – day / month / year, for example, 30th November 2005 would be entered as 30112005. You do not need to enter the slashes '/' as the software will automatically fill those in for you. Alternatively you can click on the down arrow at the end of the *Date of death* field and a calendar will be displayed. You can then simply click on the date from the calendar. Should you need to change the month or year of the calendar, this is achieved by clicking on the small arrows either side of them. To enter today's date from the calendar simply click the *Today* button in the bottom left of the calendar. To clear the date field click the *Clear* button in the bottom right of the calendar.

H.1.3 The Client page

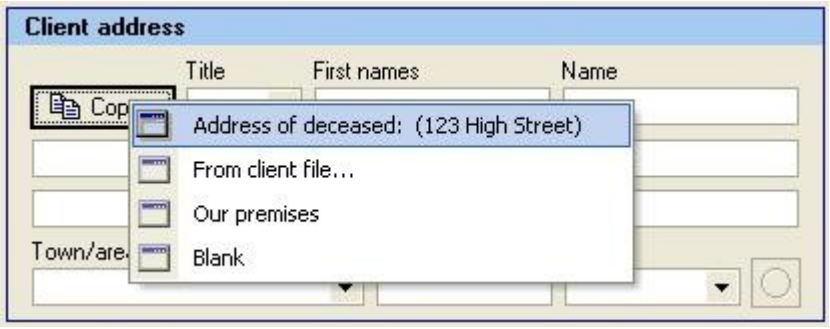
Clicking on the 'Client' tab will bring you to the page where you enter the details of the person arranging the funeral. This might not be the same as the next of kin whose details will be entered in the next section. The Client page is initially set out in 2 sections as shown in the screen shot below.



A third section will also become visible if you check the invoice to be sent to another address check box.

H.1.3.1 Client address

Client address is self explanatory and the various details are filled in the same as the deceased address. There is, however, a feature built into this page which allows you to copy the same details as that of the deceased's address without having to type out all the details again. To copy the deceased address details simply click the **Copy** button and you will be presented with various address options as shown in the screen shot below.



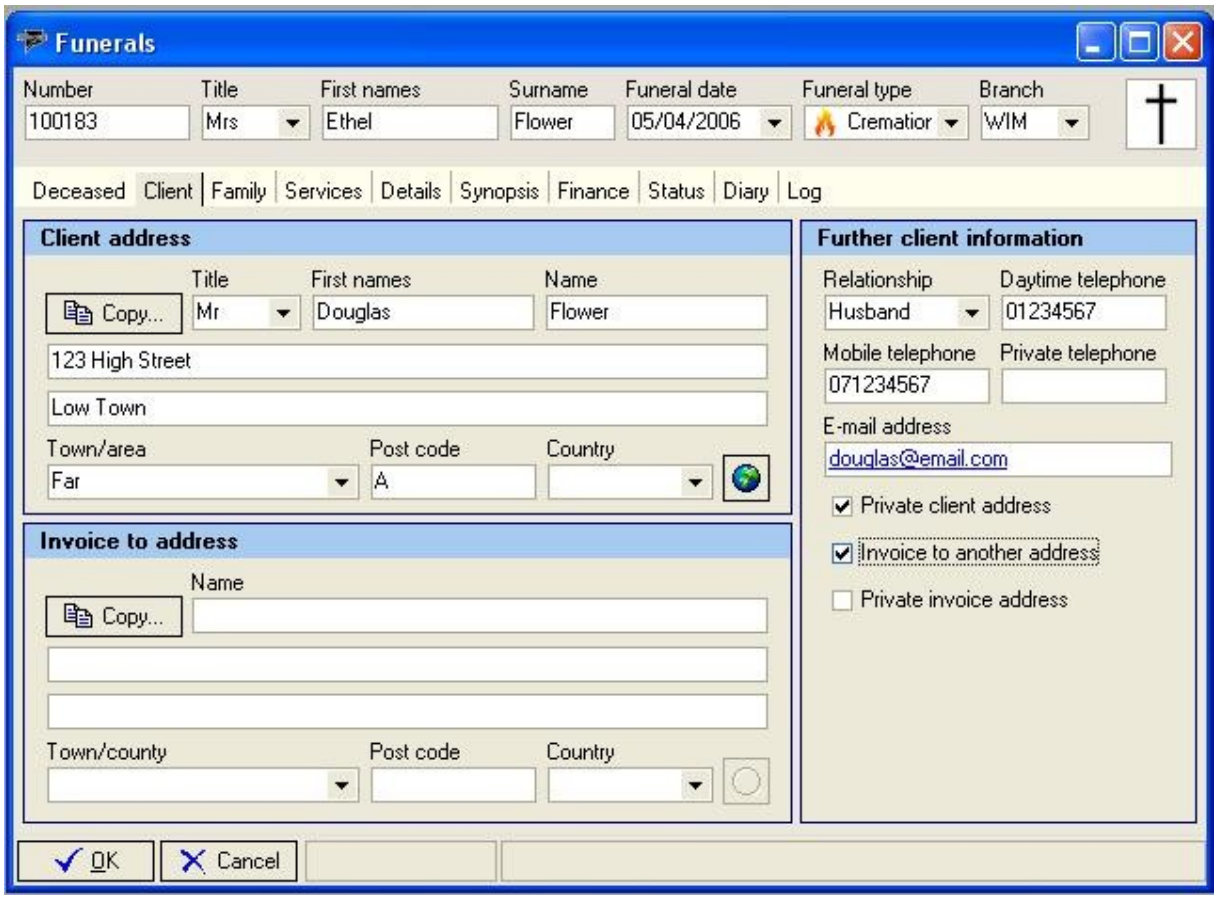
These options are basically any other address details you have previously entered along with an option 'From client file', 'Our premises' and 'Blank'. In this case the other option shown 'Address of deceased: (89 Johnson St)' was entered as the deceased s address on the previous section. To select this address for copying simply highlight the address and single click. This will fill in the address field along with the Surname field. Please note that if you want to copy an address you must click the Copy button before filling in any other details. If you fill in the name and then click Copy the name will be erased.

H.1.3.2 Further client information

The **Further client information** is a section where relationship to deceased can be entered along with contact telephone numbers and an email address. There are also 2 tick boxes labelled 'Private client address' and 'Invoice to another address'.

The 'Private client address' is checked by default. If you uncheck the box the 'Title' and 'First name' fields from the Client address box are removed. This is to enable you to enter the name of a solicitors for example rather than a persons name.

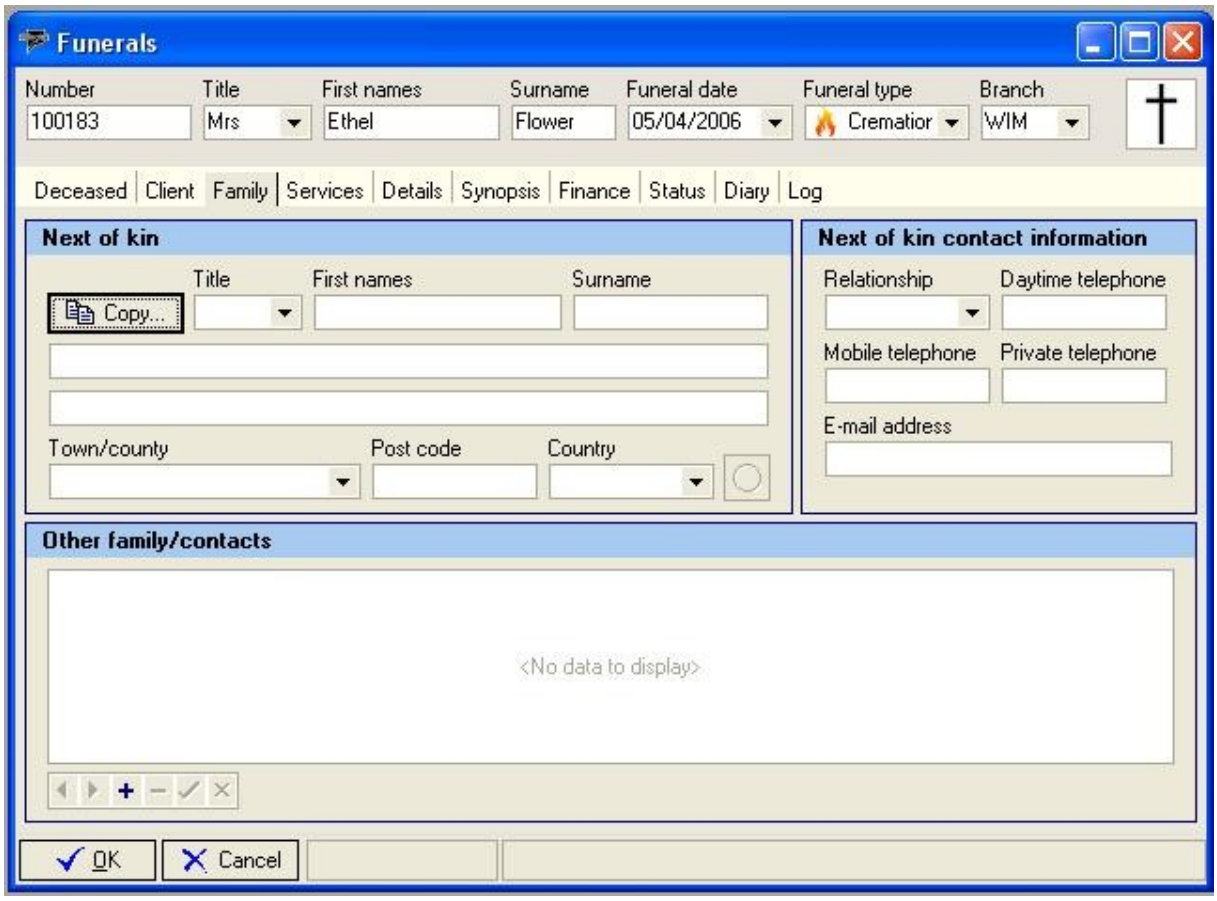
The 'Invoice to another address' is unchecked by default. If you require the invoice to go to an address other than the clients address, then you simply tick this box. You are then presented with space to enter a separate invoice address as shown below. You also get another option 'Private invoice address' which works the same way as mentioned above.



Selecting a different invoice address will amend your document printouts. Invoices will now go to the **Invoice to address**, whilst other documents such as Client confirmation will continue to be addressed to the **Client address**.

H.1.4 The Family page

Clicking on the 'Family' tab will bring you to the place where the deceased s next of kin details are held. This may or may not be the same as the client. For example, the next of kin of the deceased may be the spouse, but the son or daughter is arranging the funeral. An example of the 'Family' page is shown below.

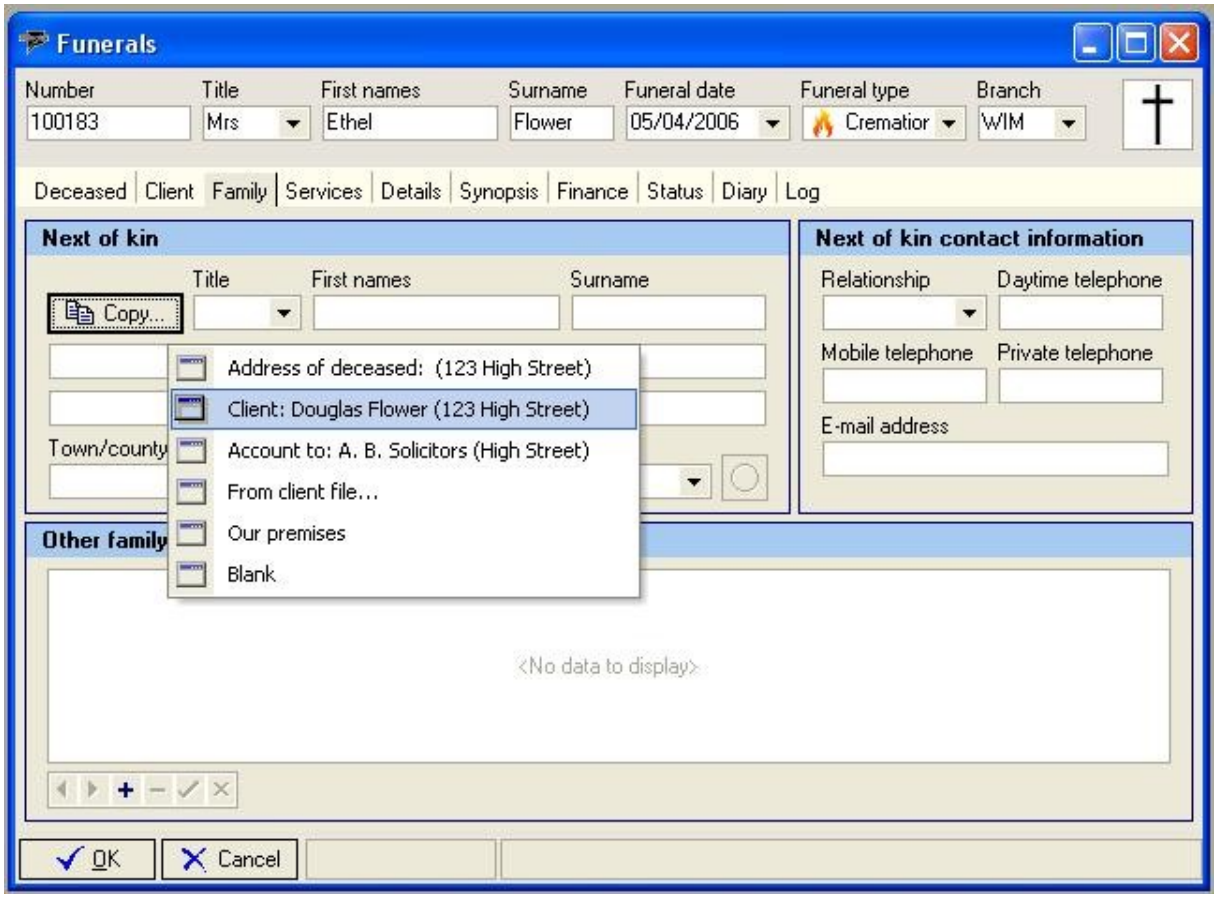


Again, there is a simple '**Copy**' button which allows you to quickly fill in all the details if they are the same as a previously entered address. Clicking on '**Copy**' will give you a few options.

If you select 'Address of deceased' then the address details will be copied from the deceased s details.

If you select 'Client', then all the details will be copied from the 'Client' page. This will include name, address, relationship and all contact information. This is a very quick way of filling in this information in the majority of funeral arrangements as the Client and Next of Kin will, more often than not, be the same.

*The screen shot below shows the '**Copy**' button selected and ready to click to copy the Client details.*



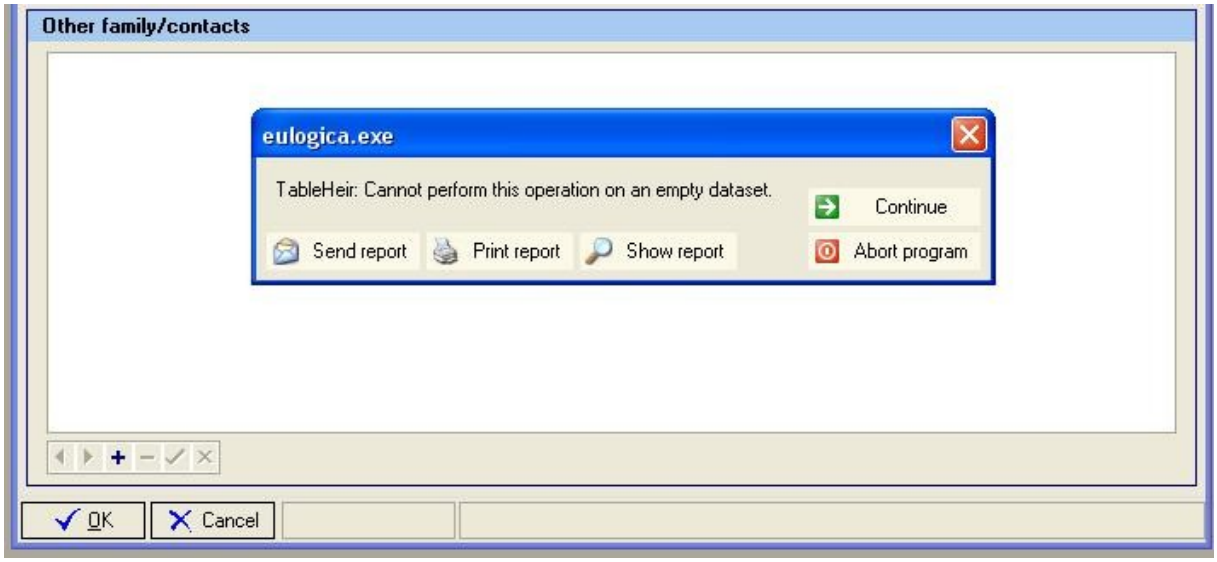
There is another field in the Family page labelled 'Other family/contacts'. Details of other family members/contacts may be recorded here. There is no limit to the amount of other family contacts that may be added.

To add details to this record you must first of all click on the '+' (add) symbol in the bottom left hand corner of the screen. This will then open a window, as shown below, where further contact details can be added.

Once you have filled in the relevant details you should click on the green tick to save the file. If you need to edit the details then simply click on the relevant field, amend the data and click the green tick to save. If you wish to delete the whole record then click somewhere within the record and then click the red '-' (minus) symbol. You will then be asked to confirm your actions.

To add another contact record, click the '+' (add) symbol, enter the new details and then click the green tick. To change the size of the contact record move the mouse over the grey line to the edge of the record, click and hold and resize the record window. If you have more records than can be shown on the screen you can either use the window bar at the bottom of the screen or the two left & right arrows to navigate along the records.

Please note, if you try and delete a record where you have entered no data you will be given a warning as shown below. Please click on the green continue button to continue working.



H.1.5 The Services page

The Services page is where you select the basic structure of the funeral. This page is made up of three sections. The top section is where **General** details are entered, then, on the left are the **Available services** and on the right the **Services for this funeral**.

Services are the individual items which make up a funeral. For example, a very simple funeral may consist of the following services: Arrangement, Removal of deceased, Doctors, Coffin, Conductor, Hearse, Cremation, Minister at funeral, Disposal of CR's.

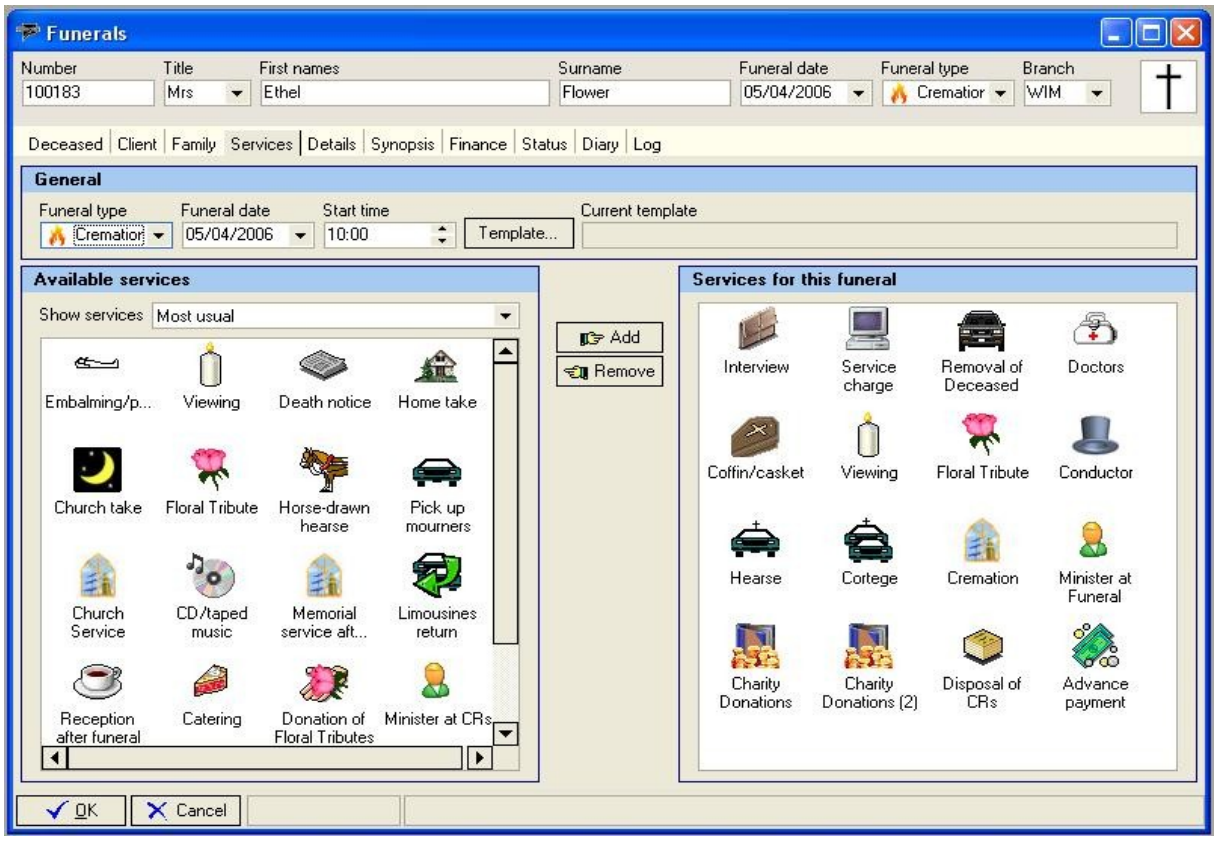
A more elaborate funeral may have additional services such as Death notice, Home take, Floral tributes, Cortege, Church service, Catering, Acknowledgement notice etc. If these service are added, then you will be able to fill in specific details about these services as described in the next section.

An example of a service which will almost always be used for a funeral is the 'Coffin' service. As most funerals have some form of coffin, this service will need to be added to allow you to enter the coffin details. As already mentioned, entering specific details will be discussed in the next section.

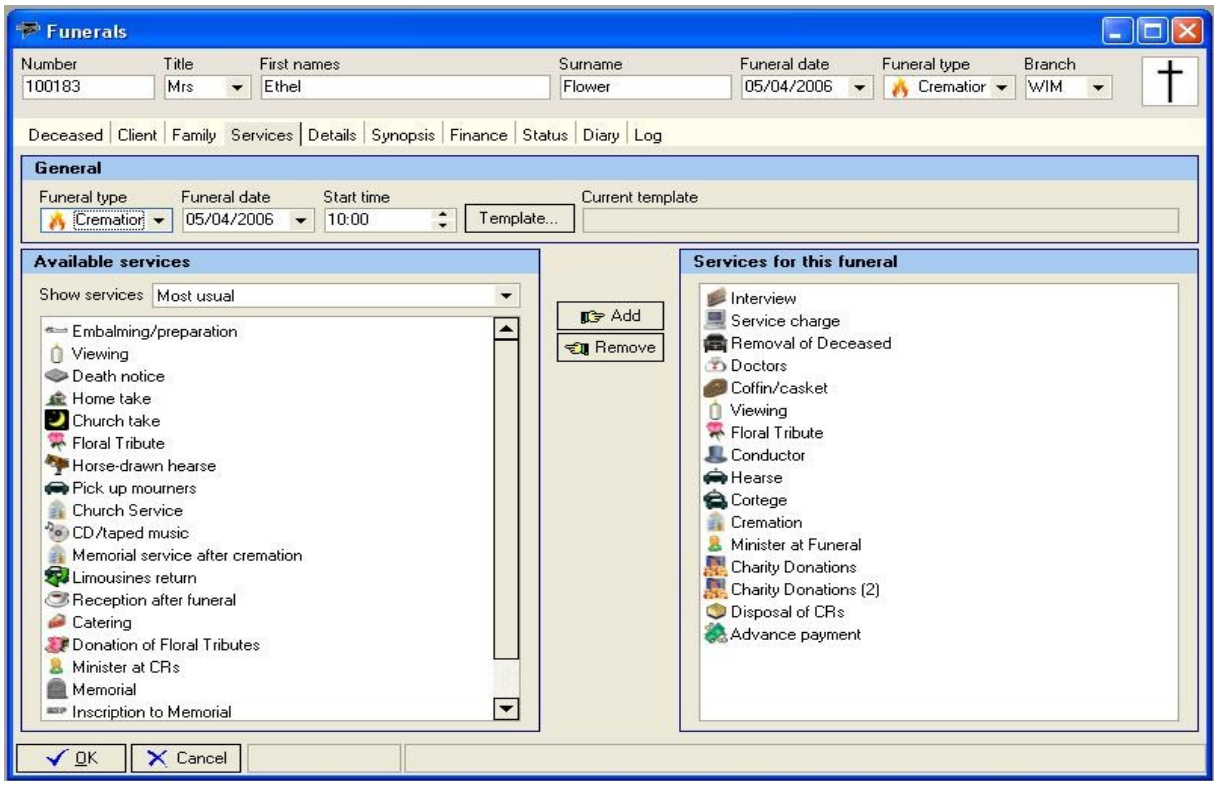
An example of a service which may not be on all funerals is the 'Death notice' service. If there is to be no death notice for a particular funeral, then this service would not need to be added and therefore you will not be asked to fill in any details for this service later on.

You can choose to view small or big icons in the Services menu. Just select **View | Big icons in windows.** That is, click the View menu, then click the menu item “Big icons in windows”. Note: this will also change the icons in the 'Details' page.

*The screen shot below shows '**Big icons in windows**' selected.*



*The screen shot below shows '**Big icons in windows**' NOT selected.*



H.1.5.1 General

It is important that this section is filled in before the services are selected. The General section includes fields for Funeral type (Cremation, Burial or other), Funeral date and Start time. These are core details which some of the services will depend on.

Funeral type: Cremation, Burial or Other. This selects which services and templates will be available to use.

Funeral date: Sets the date of the funeral. The date can be entered using the keyboard or by using the small down arrow on the right hand side of the field to open up a calendar.

Start time: This sets the time at which you want staff available for this funeral and also where the block diary entry for the funeral will start. For example, if the funeral is to leave your premises at 09:30 then you may want your Conductor and staff to be available for this funeral from 09:00 to close the coffin and load up etc. In this case you would set the **Start time** to 09:00

Note: As was mentioned above, the **Funeral** date and **Start** time are core details of the system. If you come back to this section and change either the **Funeral date** or **Start time** you will be presented with a pop up box as shown below. This is just informing you that you are about to change some of the core information and it could take a few seconds. Simply click **OK** and wait until the blue bar in the bottom finishes updating first the services and then the tasks. While it is updating the services and tasks you will have the egg timer symbol for your pointer and the blue bar at the bottom of the screen will

gradually get bigger. Following completion of these updates the egg timer will return to the normal pointer and you can then carry on working.

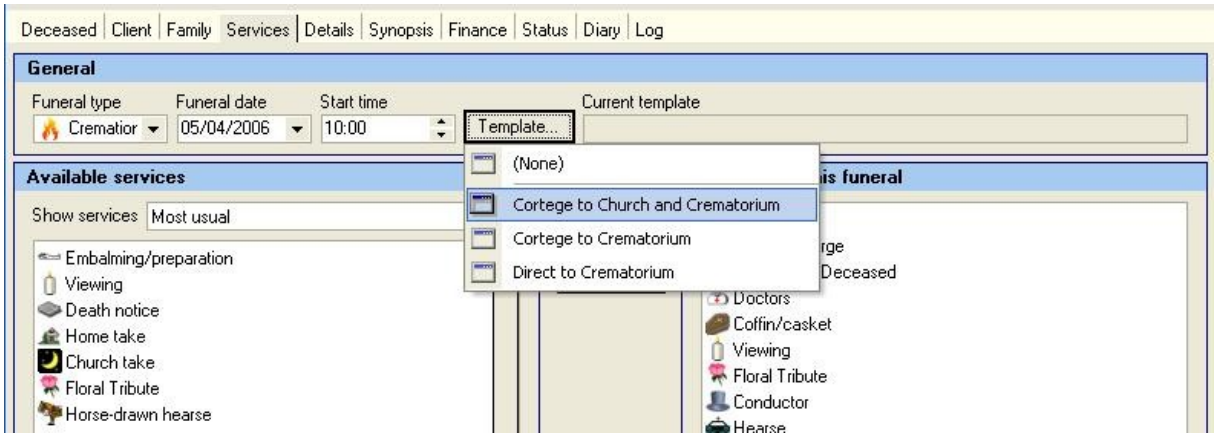
The screen shot below shows the pop up box informing you that core information is about to be changed.

H.1.5.2 Service Templates

Once these details have been entered a Template can then be selected. Templates will vary depending on what type of funeral you have selected and also how your system has been configured. Templates are designed to enable the user to be able to easily select the most common services associated with a funeral.

To use Templates simply click on the **Template...** button and select the most appropriate template from the list. The services set up in this template will then be moved across into the **Services for this funeral** window. Once this has been done the template in use will show in the field just to the right of the **Template..** button, labelled **Current template**. Contact the software supplier if you want to discuss any reconfiguration of the templates.

*The screen shot below shows a sample **Template** selection.*

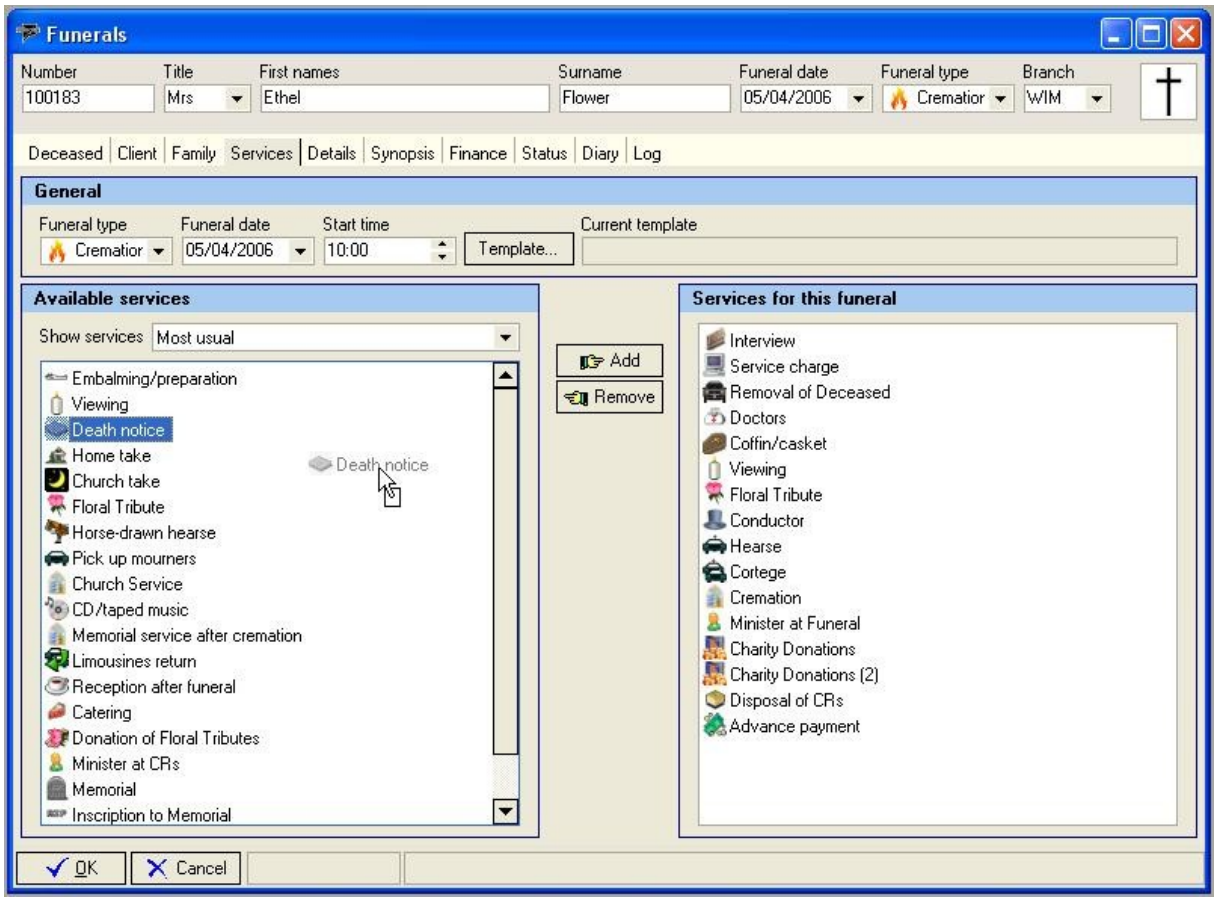


H.1.5.3 Adding / Removing individual services

If other services are required after you have selected a particular template, then simply select the service you require from the **Available services** window and drag it across to the **Services for this funeral** window. To do this, left click on the service required and then drag it across anywhere into the right hand window and unclick the left mouse button.

The same also applies if you wish to remove a service from the **Services for this funeral** window, i.e. remove the service for this particular funeral. Select the service you wish to remove in the **Services for this funeral** window and drag it across to the **Available services** window. This will then remove any reference to this service for this particular funeral.

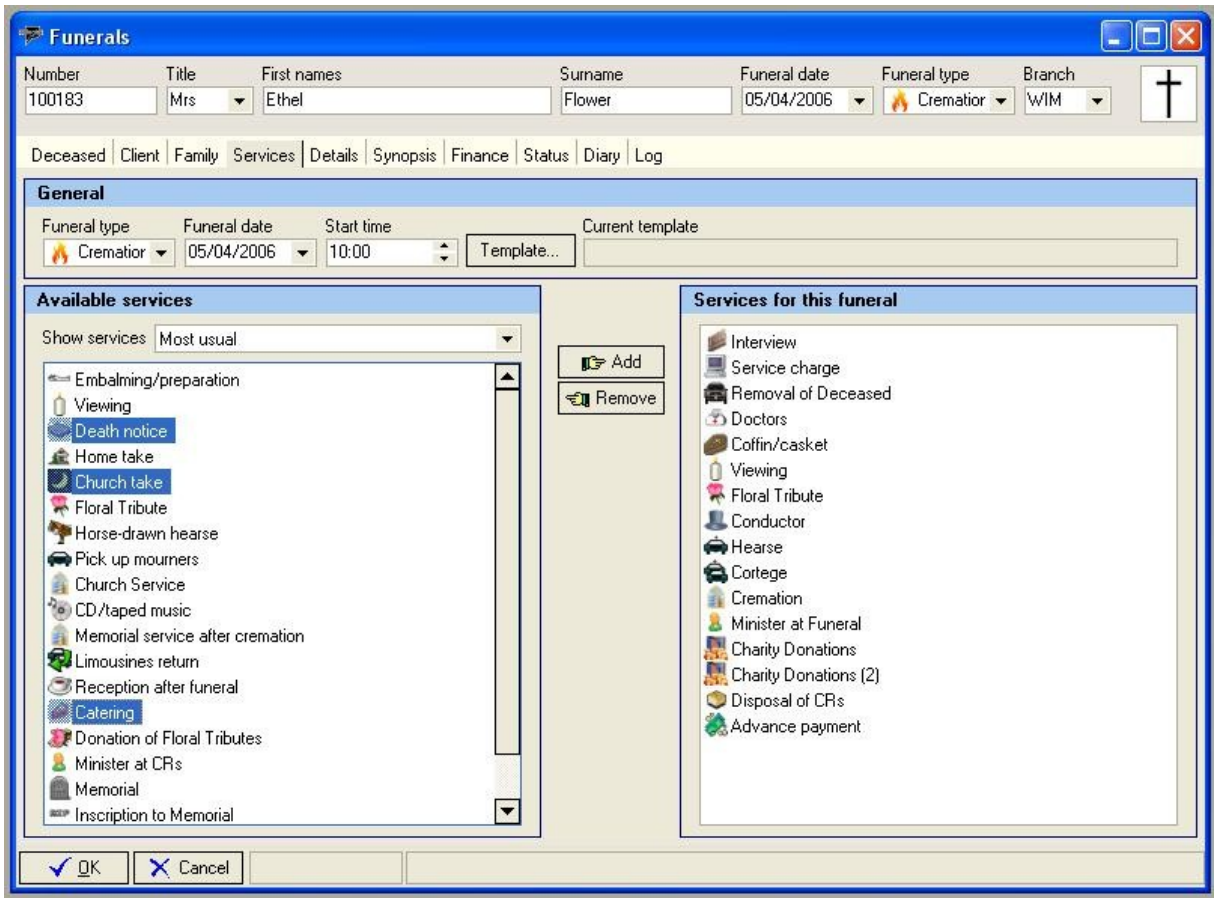
*The screen shot below shows the 'Death notice' service being dragged across from the **Available services** window to the **Services for this funeral** window.*



Multiple services can also be dragged across at the the same time. Press and hold **Ctrl** whilst using the left mouse button to select the services on the left. Once you have selected the ones you want use the left mouse button on any one of the selected services and drag them to the right hand window. All the highlighted services will then be moved into the **Services for this funeral** window.

Again, the same also applies if you want to remove multiple services from a funeral. Simply select the services on the right and then drag them across to the left. All the highlighted services will then be removed form this particular funeral.

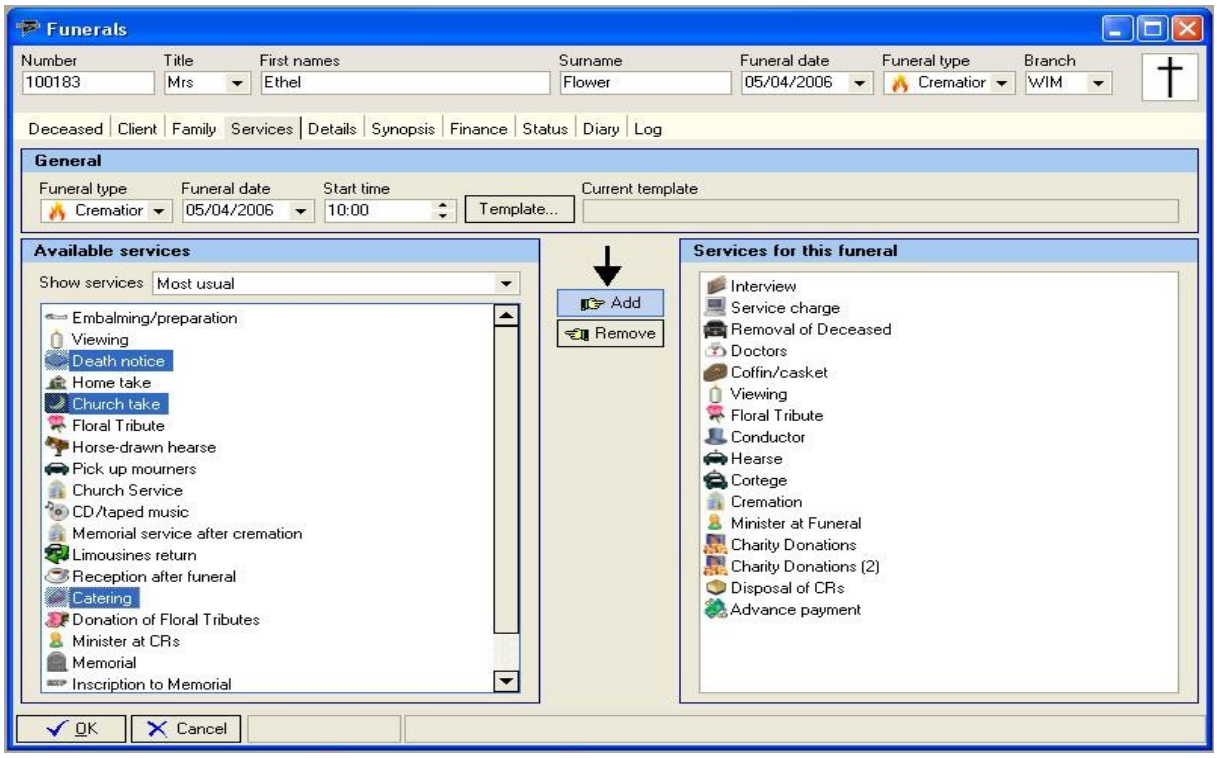
The screen shot below shows the 'Death notice, Church take, and Catering' services being selected, ready for dragging across to the ***Services for this funeral*** *window.*



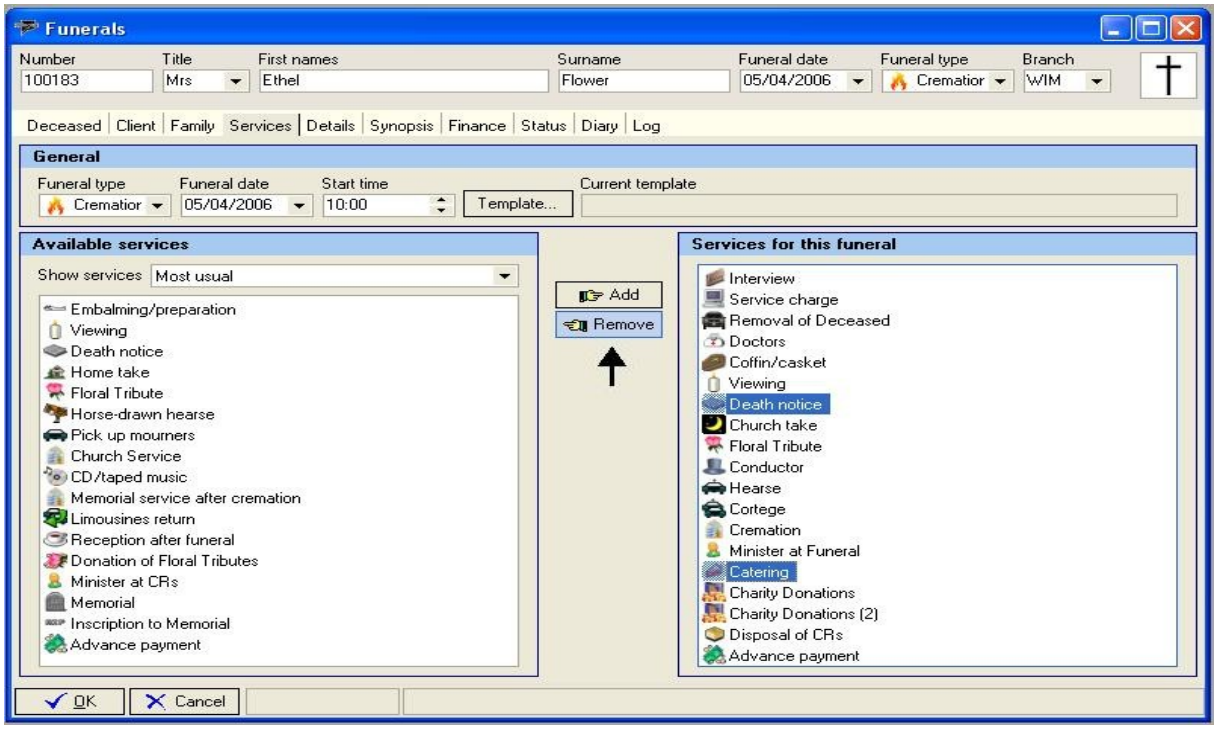
Alternatively you can add a service by clicking on it in the **Available services** window and then clicking the **Add** button in between the 2 windows. To select multiple services at the same time, press and hold **Ctrl** whilst selecting the services and then click the **Add** button.

The same applies for removing services. You can select the service or services in the **Services for this funeral** window and then click the **Remove** button in between the 2 windows. All the highlighted services will then be removed.

*The screen shot below shows 'Death notice, Church take and Catering' services being added using the **Add** button.*



*The screen shot below shows 'Death notice and Catering' services being removed using the **Remove** button.*

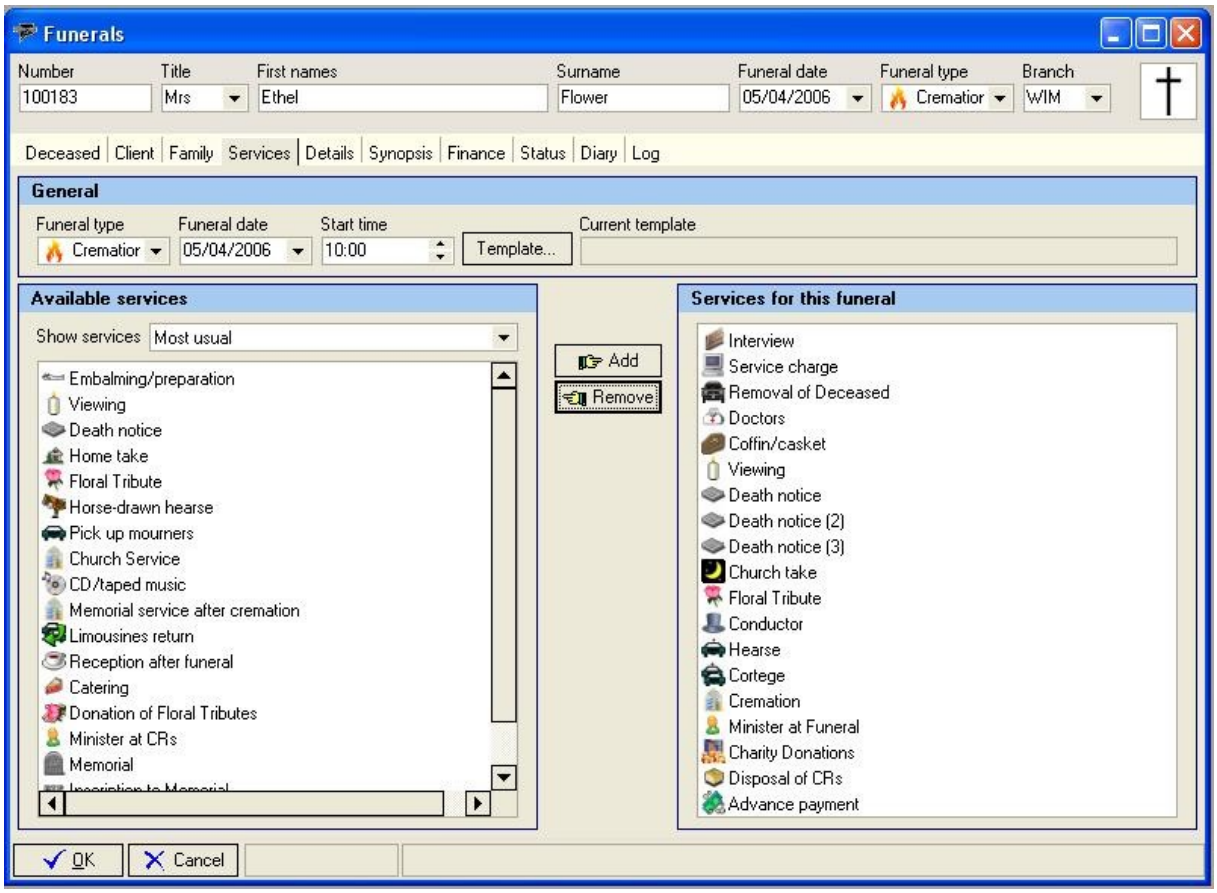


H.1.5.4 Adding multiple services

Some services can only be added once, whereas other services can be added multiple times. For example, the 'Coffin/casket' service can only be added once as you will generally only need one coffin. Once this service has been added to the **Services for this funeral** window, it will disappear from the **Available services** window.

An example of a service which can be added multiple times is the 'Death notice' service. You may want to put a death notice in 2, 3 or more different newspapers. These may all have the same wording, or they may be different. They may all be published on the same day or they may be different. Having the ability to add multiple 'Death notice' services enables you to cope with all these different scenarios. After adding the 'Death notice' service to the **Services for this funeral** window you will notice that it doesn't actually disappear from the **Available services** window. You can now add another 'Death notice' service to the **Services for this funeral** window. If you do this it will be added and called 'Death notice (2)' or 'Death notice (3)' etc depending on how many you have already added. It will also never disappear from the **Available services** window so you can add as many as you like.

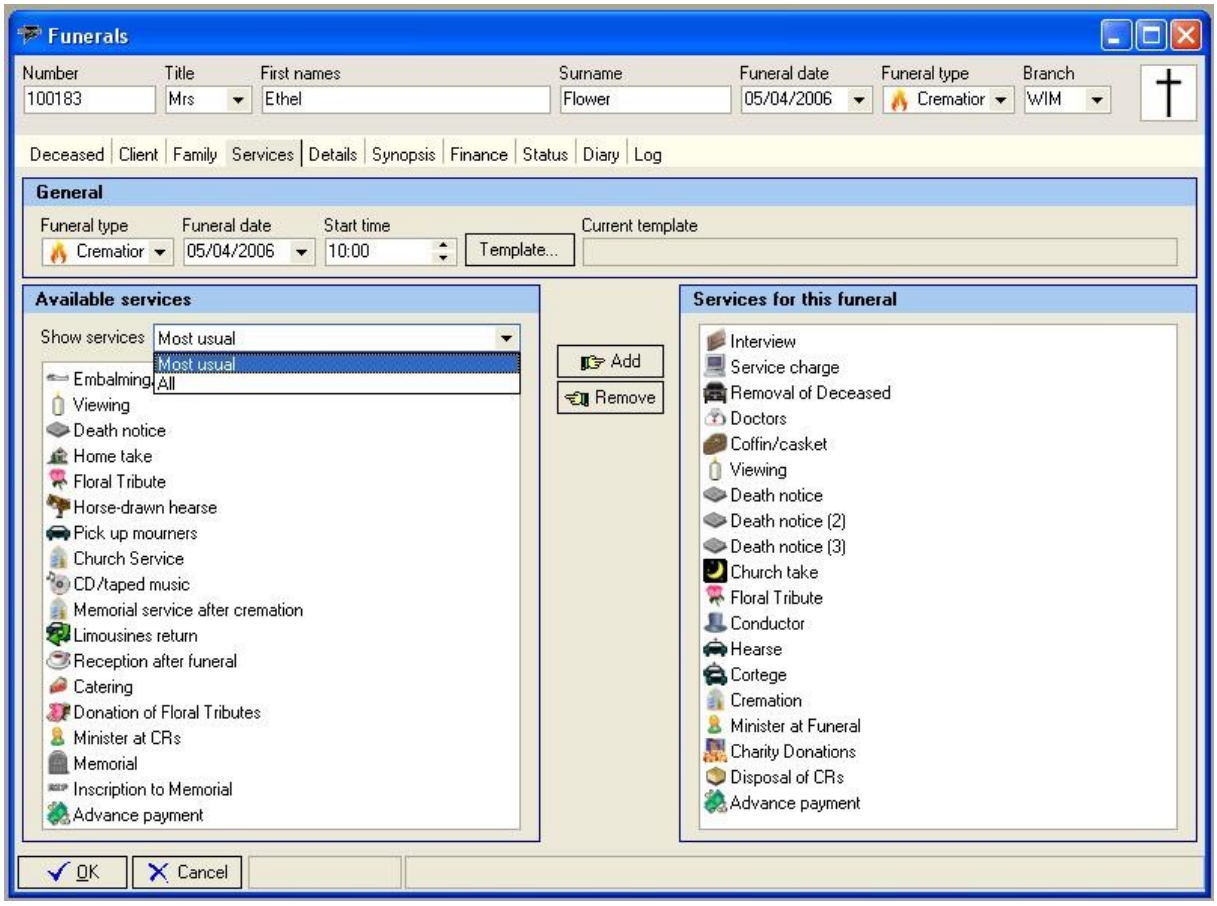
*The screen shot below shows that the 'Death notice' service has been added 3 times and is still available in the **Available services** window. Also note that the 'Coffin/casket' service is no longer available in the **Available services** window as it has already been added to this funeral.*



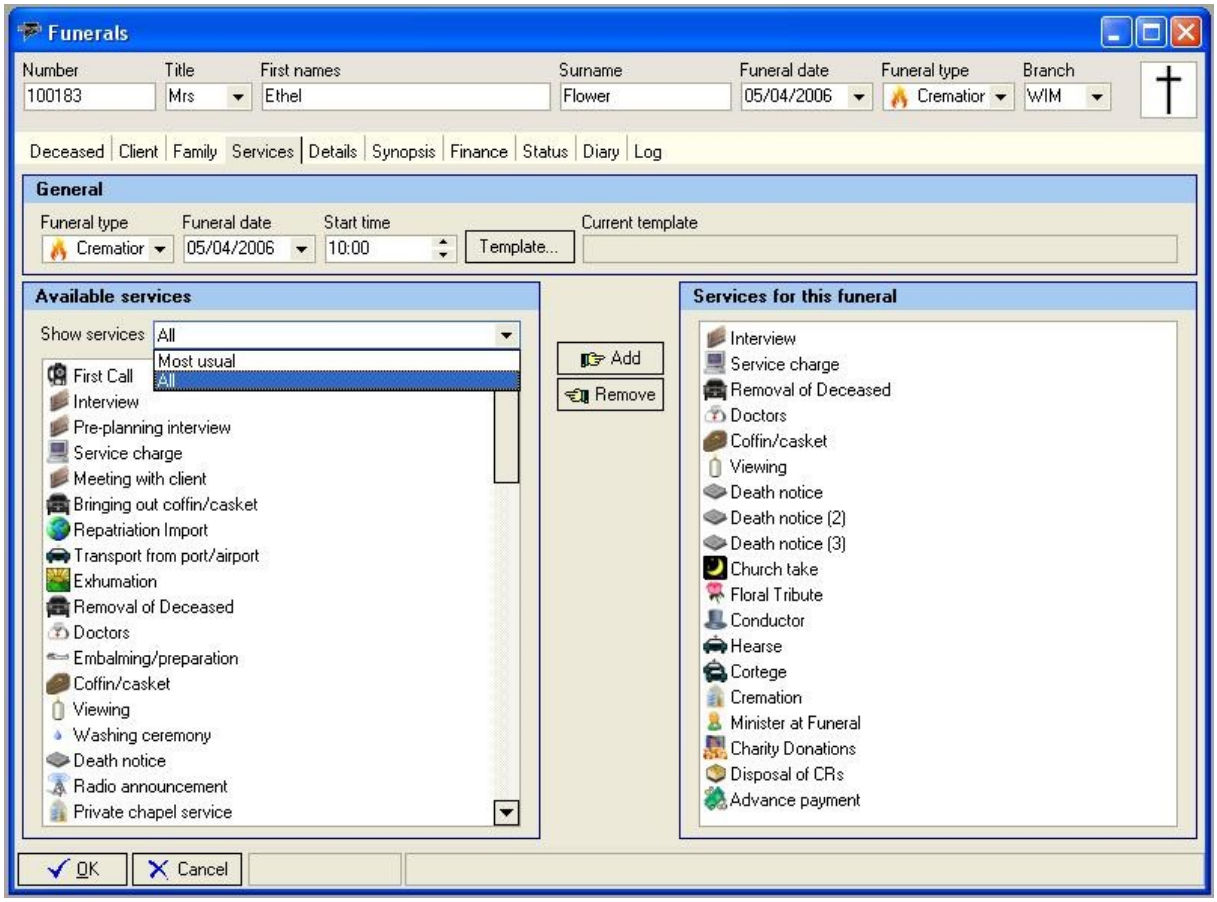
H.1.5.5 Most usual / all services

In the **Available services** window you will also notice a drop down menu called **Show services**. There are only two options here, the default option being **Most usual** and the second option being **All**. This menu determines whether you see the services most usual for your company or the complete list of services available. The option **Most usual** is basically a filter which hides the services you will only use occasionally and stops you having to search through the long list of services for the ones you are most likely to use everyday. If a particular service is required for a funeral which is not in your **Most usual** list, then simply select **All** to be presented with the complete service list. For example, the 'Cryonic suspension' service is probably not needed for most of your funerals and so won't be included in the **Most usual** services list. If, however, you need to add that service to a particular funeral, simply select **All** services in the **Show services** menu and then scroll down the list to find the service. It can then be added in the normal way. Please contact your software supplier if the **Most usual** filter needs amending.

*The screen shot below shows the **Available services** window with the **Most usual** option selected in the **Shows services** menu. Notice that in this case, all the services fit in the window.*

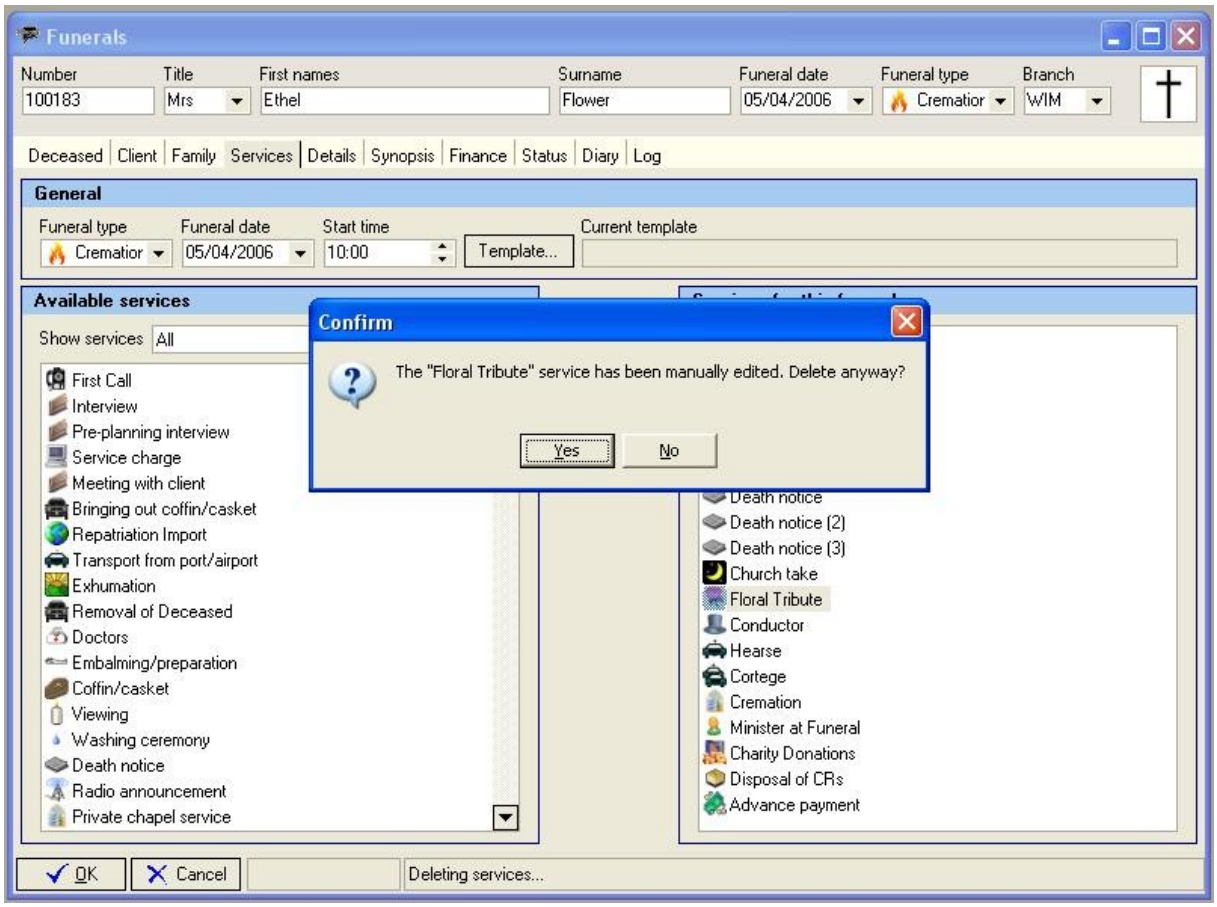


*The screen shot below shows the **Available services** window with the **All** option selected in the **Shows services** menu. Notice now that all the services will not fit in the window and there is now a scroll bar to enable you to look up and down the extensive services list.*



Once you have finished creating the basic structure of the funeral, you move to the **Details section** where you can then enter specific details for each of the services. You can add and remove services at any time whilst the funeral is unlocked, i.e. not invoiced. If you try and remove a service where you have already entered some details, for example, one of the 'Death notice' services where you have selected the newspaper, date for publication and wording, then you will be warned of this fact and asked to confirm that you really want to remove the service.

The screen shot below shows the warning if you try to remove a service for which you have already entered specific details.

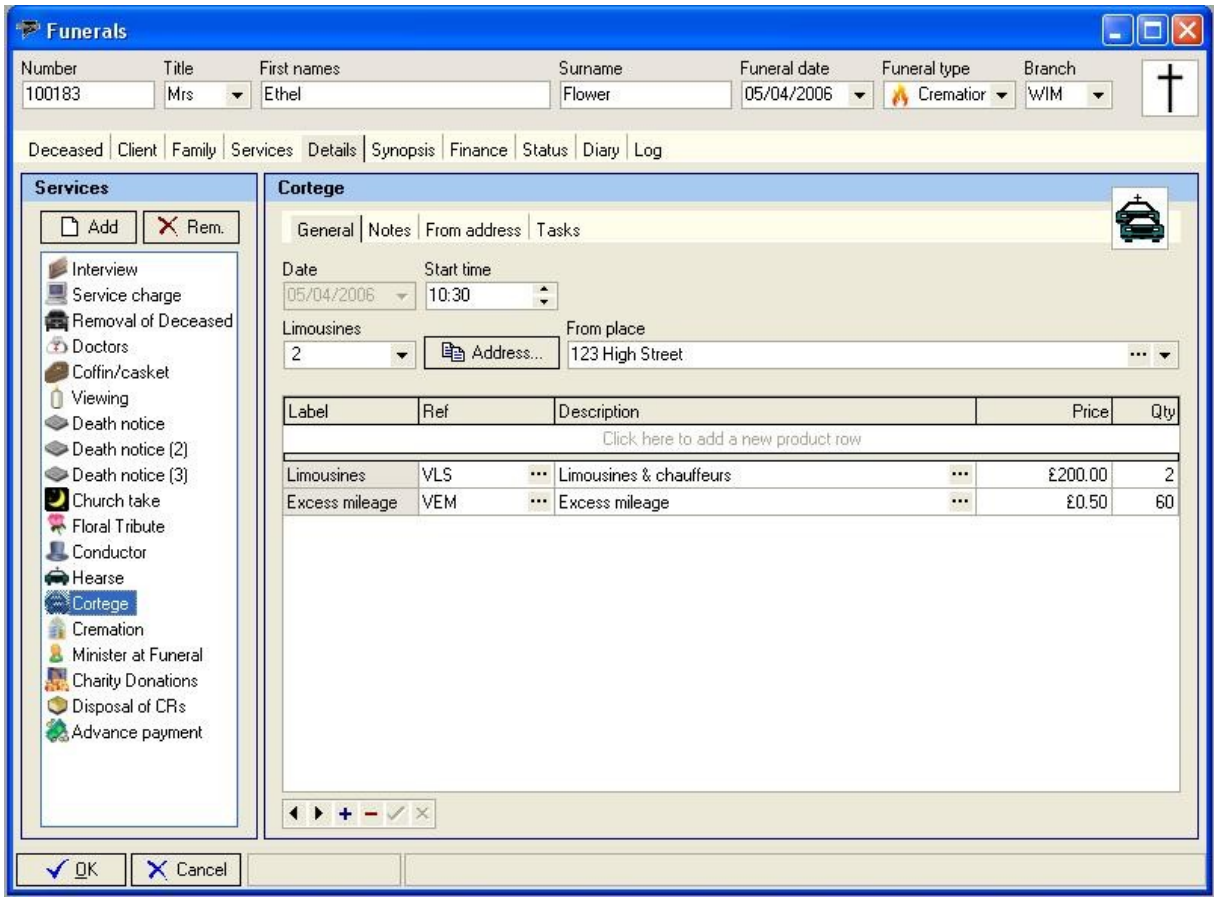


H.1.6 The Details page

Once you have added the main services required for a funeral, the Details page is where you can then fill in specific information about each of those services. Some of the services will need very little information adding, whereas others may require much more detail to be entered. Many of the services will have been configured for your specific company and may not appear the same as the examples shown here. It is important to enter information both fully and correctly in these fields as certain fields dictate what is printed on certain documentation.

The Details window is basically made up of 2 separate windows. On the left is the list of Services you added in the Services window, and on the right the window where specific details can be entered for the selected service.

The screen shot below shows the Details page with the 'Cortege' service selected on the left with the specific details of that service on the right hand side.



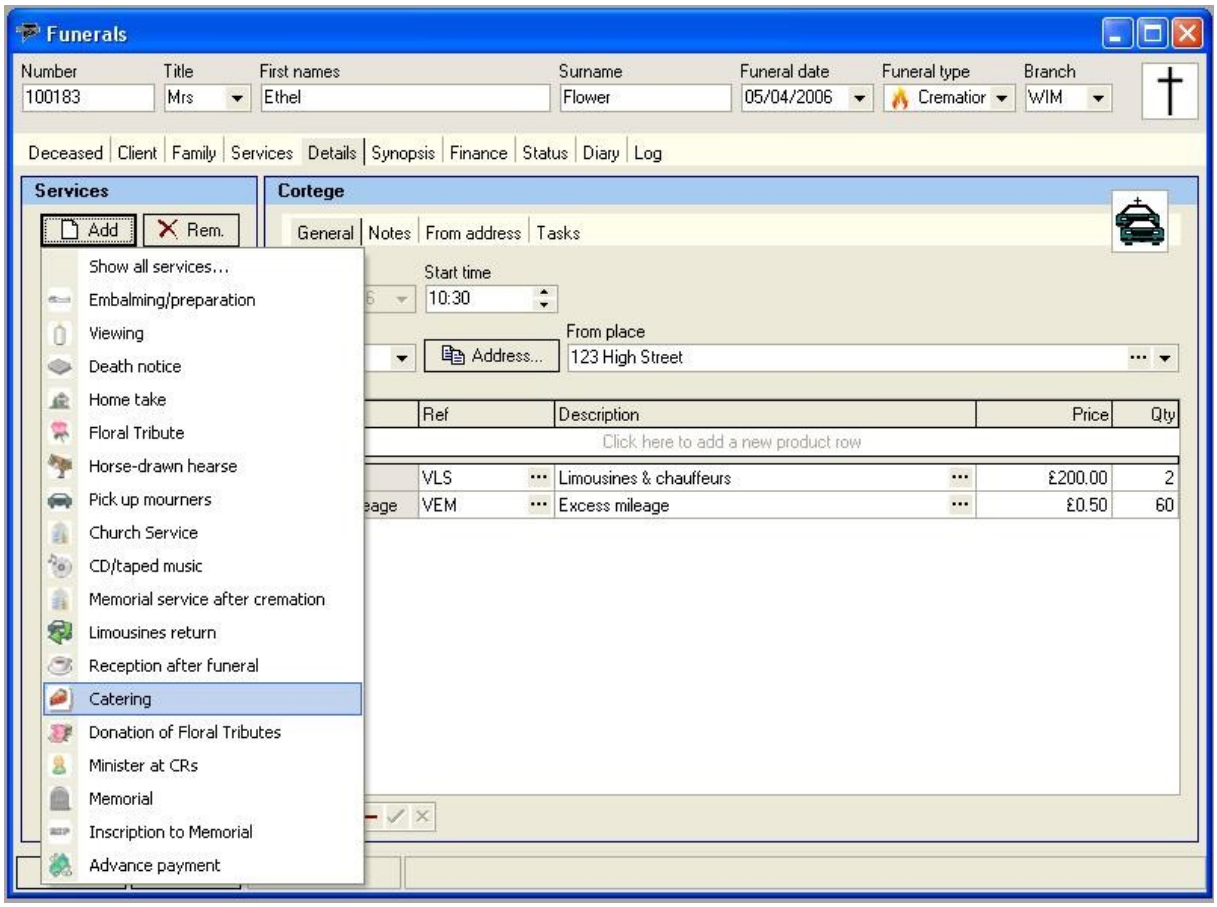
H.1.6.1 Services window

The services window consists of 2 buttons labelled **Add** and **Rem**, and a window with the list of services previously added. The **Add** and **Rem** buttons can be used to add or remove services as you did on the services page. This allows for quick and easy editing of single services without having to switch back to the Services page.

The services are selected by simply left clicking on the required service. This will then highlight that service and show the details on the right hand side. The title and the icon in the right hand side window will change to reflect the service you have selected.

If you need to add an additional service simply left click on the **Add** button. You will then be presented with a list of the Most common services, similar to the Services page. Select the service you wish to add by moving the mouse over the service you require and left clicking it. This service will then be added to your list of services for this funeral.

The screen shot below shows the Details page with the 'Catering' service highlighted ready for adding.

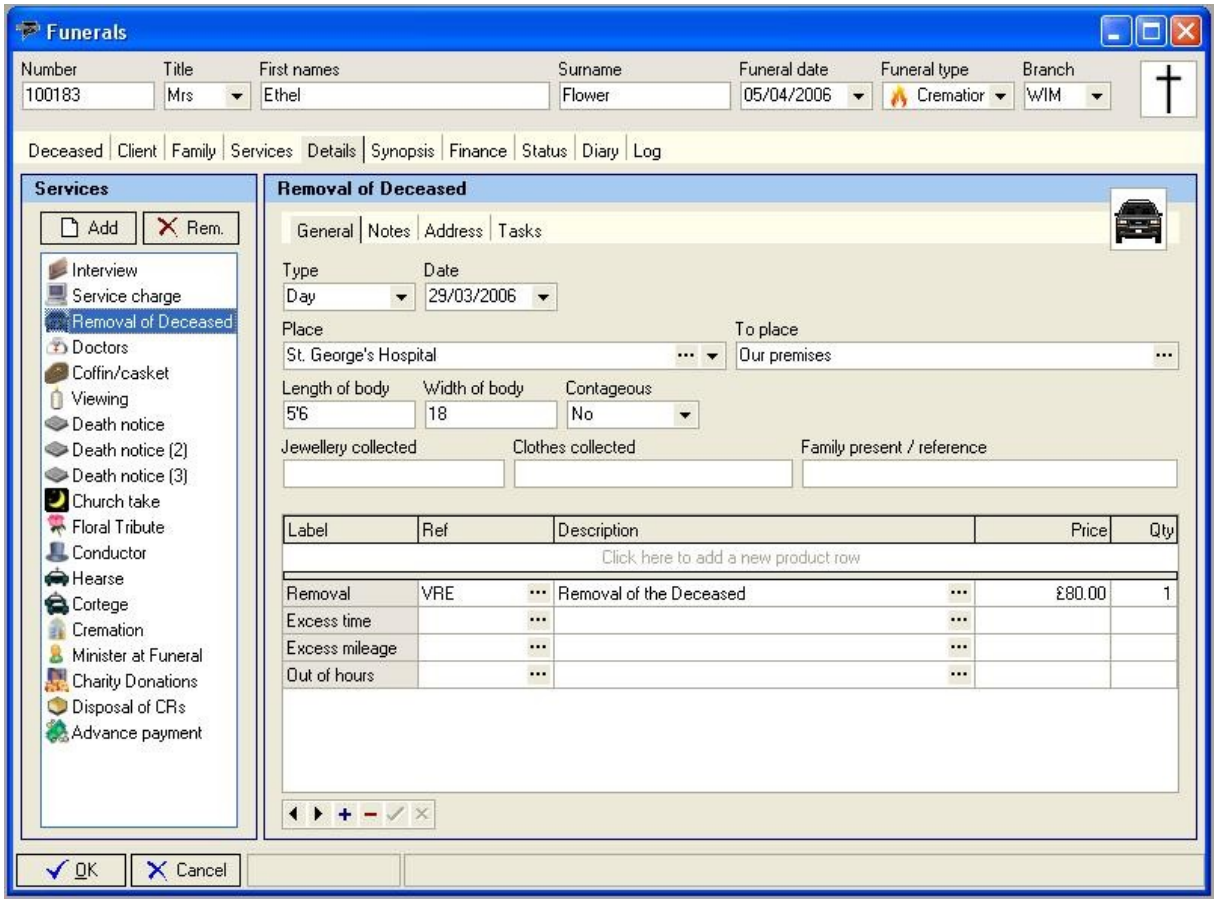


If a service is required which is not in the Most usual list of services, then simply click the **Show all services...** option at the top of the list. This will open up a long list of services which you can scroll up and down using the little arrows at the very top and very bottom of the list. Once you have found the service you require simply left click on it to add the service.

H.1.6.2 The Details page – General

This is the window where you fill in the various details about a particular service. The layout and amount of fields to complete will change for all the different services. For example, the 'Removal' service may have fields for what type of removal it was. This may consist of options like Daytime removal, night time removal or a weekend removal. It may also have fields for where the removal was from, and where it was to, along with body size etc. This will all depend on your particular installation and how the system has been configured to suit your company. Towards the lower half of the window is the place where specific products and prices can be entered. This section will be looked at later.

The screen shot below shows the 'Removal' service details page.



The way data is entered into the different fields will also vary depending on what type of data the field is set up to contain. For example, the data entered into time and date fields has to be entered in a specific way. Address fields have options to enable you to easily select certain addresses or to simply type in the address. Some fields are plain text where you can type in some free information and other fields are set up to allow you to select from a list of items. The different ways are detailed below:

Date fields

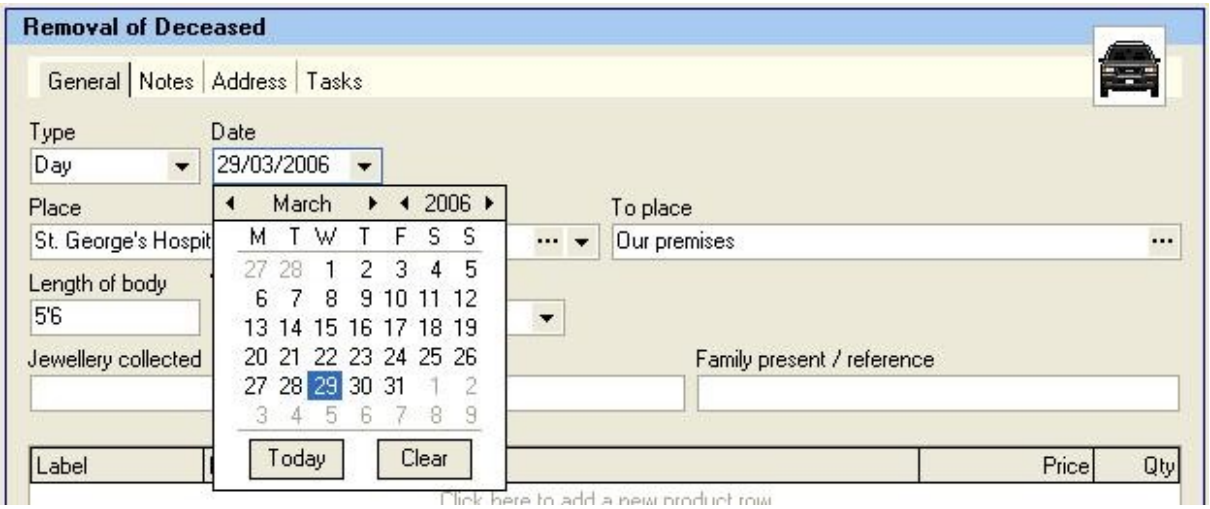
The date can be entered in 2 ways. You can either type the date in manually, or select a date from the calendar. The date will be shown in the format Day, Month, Year. For example, the 16th March 2006 will be shown as 16/03/2006 and the 9th January 1970 will be shown as 09/01/1970.

To enter a date manually you simply type the date without the /'s. For example, to enter 9th January 1970 simply type 0901970 in the date field and the system will insert the /'s. If you miss out the first 2 digits of the year, in this case 19, the system will attempt to fill in the correct century. If a year is entered without the first 2 digits and it ends in the numbers 00 to 29, the system will enter the date as 2000 to 2029. If a year is entered without the first 2 digits and it ends in the numbers 30 to 99, the system will enter the date as 1930 to 1999. It is better to enter the year in the full format so that no errors occur.

The second way of entering the date is to click on the small down arrow to the right of the date field, which will then open up the calendar. The current month of the current year will open up by default and the current date will be highlighted. You can then either left click on a date shown, or use the small arrows either side of the month and year to scroll backwards and forwards through the months

and years. Once you get to the month and year you require left click on the date for it to be entered. There are also buttons at the bottom of the calendar to allow you to select today's date, or clear the date field.

The screen shot below shows a calendar from a date field.

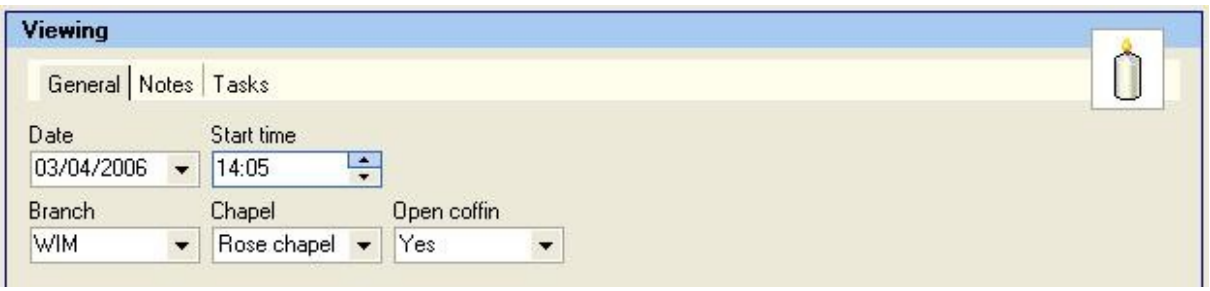


Time fields

The time can also be entered in 2 ways. The easiest way is to simply type in the time required. It must be noted that all times are entered using the 24 hour clock format. If you want to enter 2:15PM then you must enter 14:15. If you enter 02:15 then any documents produced will refer to 2:15AM rather than 2:15PM. The diary entry generated by the system will also be incorrect. So, to enter a time, click in the box and highlight the the whole time field. Now enter the time using the 24 hour clock format.

The second way of entering the time is to use the small up and down arrows to the right hand side of the field. By clicking either the up and down arrows a time of 00:00 will be entered in the time field. You can then use the up & down arrows to scroll up and down the hours. If you click the cursor in the minutes part of the time field (anywhere to the right of the :) then you will be able to scroll up and down the minutes. The hours will also change as you come to :59 and are scrolling up or :00 and you are scrolling down.

The screen shot below shows a time field being populated.

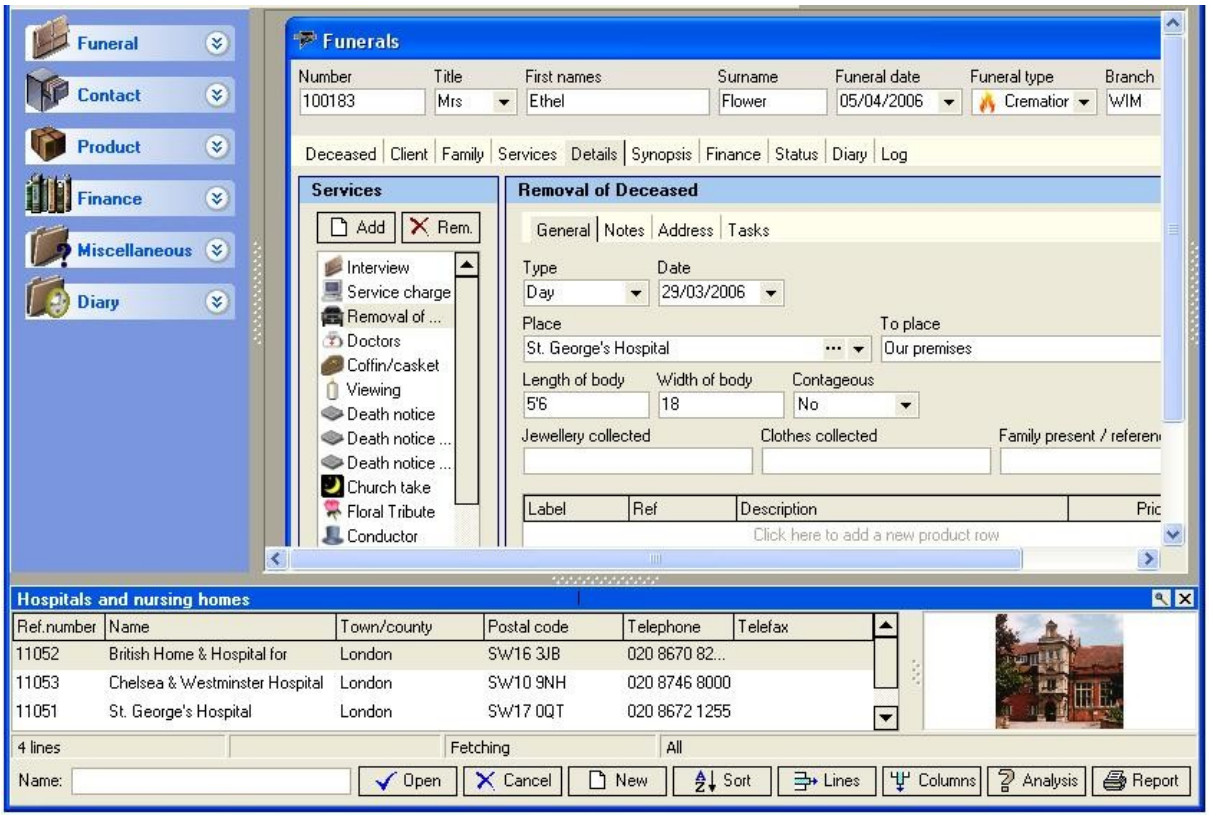


Address fields

Address fields are shown as a single line. For further details of the address you will need to look at the Address page as shown further on in this section. The single line address field gives you a quick view of where the address is. There are generally 3 ways to enter data into this field. You can either type the address in manually, or you can select from 2 different area's. It is best to select the address if possible to ensure the correct details are entered.

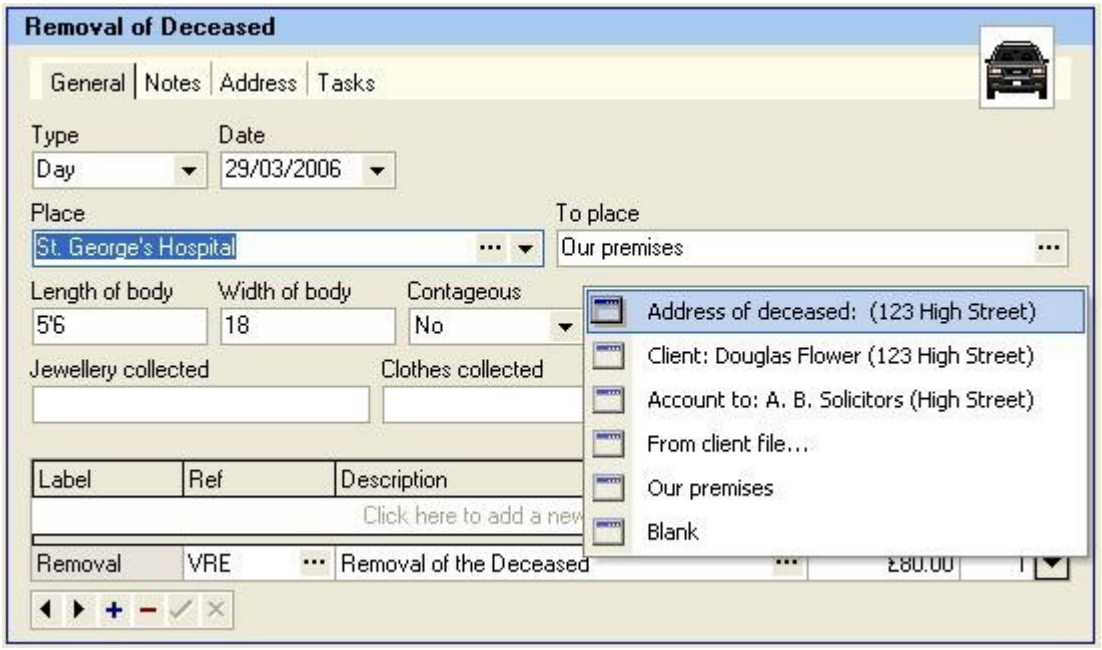
On the right hand side of the address field there are generally 2 'buttons'. One is three dots **...**, and one is a down arrow. By clicking on the 3 dots you will open a Contact file that is generally associated with the service you are in. For example, if you click the 3 dots in the 'Removal' service you will open up the 'Hospitals & nursing homes' file, whereas if you are in the 'Cremation' service you will open up the 'Crematoria & cemeteries' file. You can then scroll through the list and select the place you are looking for. The details will then be entered into that field.

The screen shot below shows one of the contact files opened after clicking the three dots in the address field of 'Place'. An address can now be selected from the list.



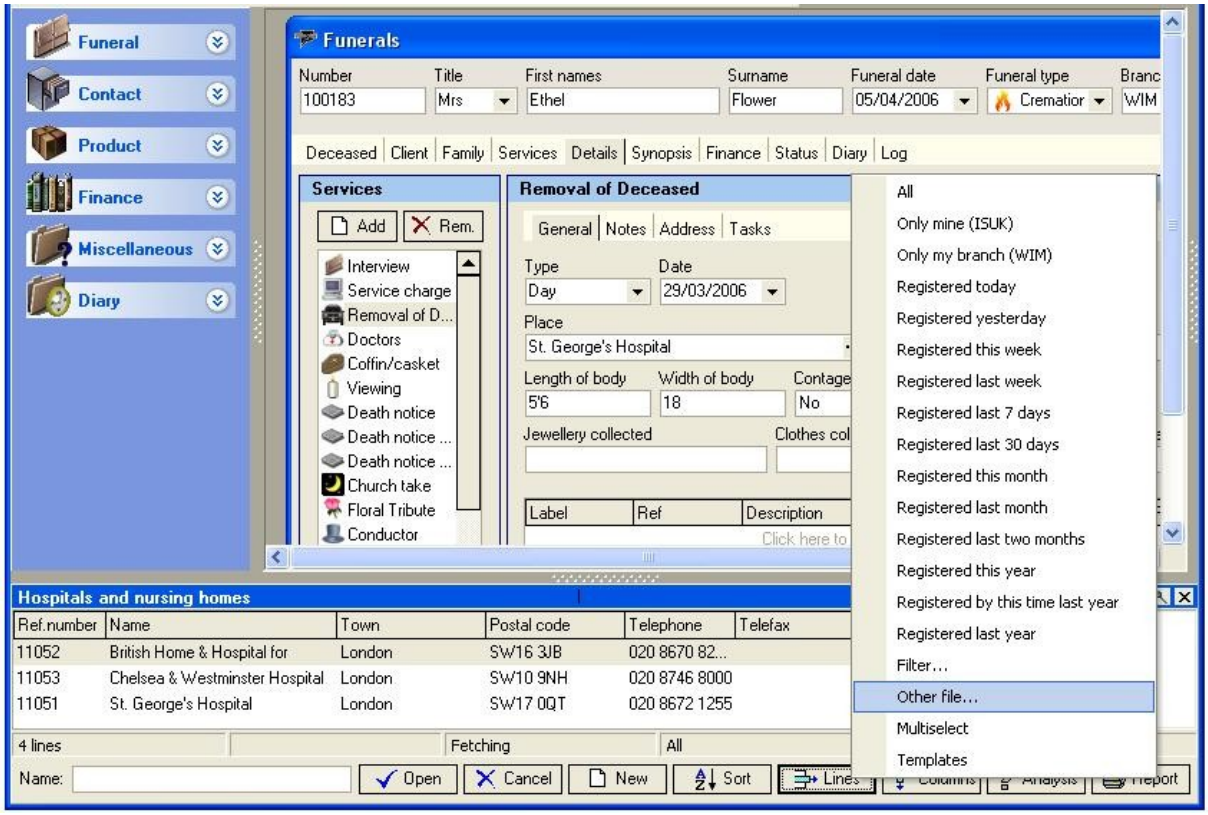
By clicking the small down arrow at the right hand side of the address field you will open up a list consisting mainly of addresses you have already entered for this funeral. This option has the same functionality as the *Copy* button as used in the Client & Next Of Kin pages discussed earlier.

The screen shot below shows list of addresses available when clicking on the small down arrow.



You can then select any of the addresses and the details will be filled in the address field. As well as previous addresses entered for this funeral you will also be presented with 3 other options. These options are 'From client file...', 'Our premises' and 'Blank'. The 'From client file' will open up your existing client contacts file. This contact file lists existing clients whose details have already been entered into the system. You can either select an address off this list or use the *Lines* button in the bottom right of the file and then select 'Other file...'. This will then give you the option to open one of your other contact files to find an address.

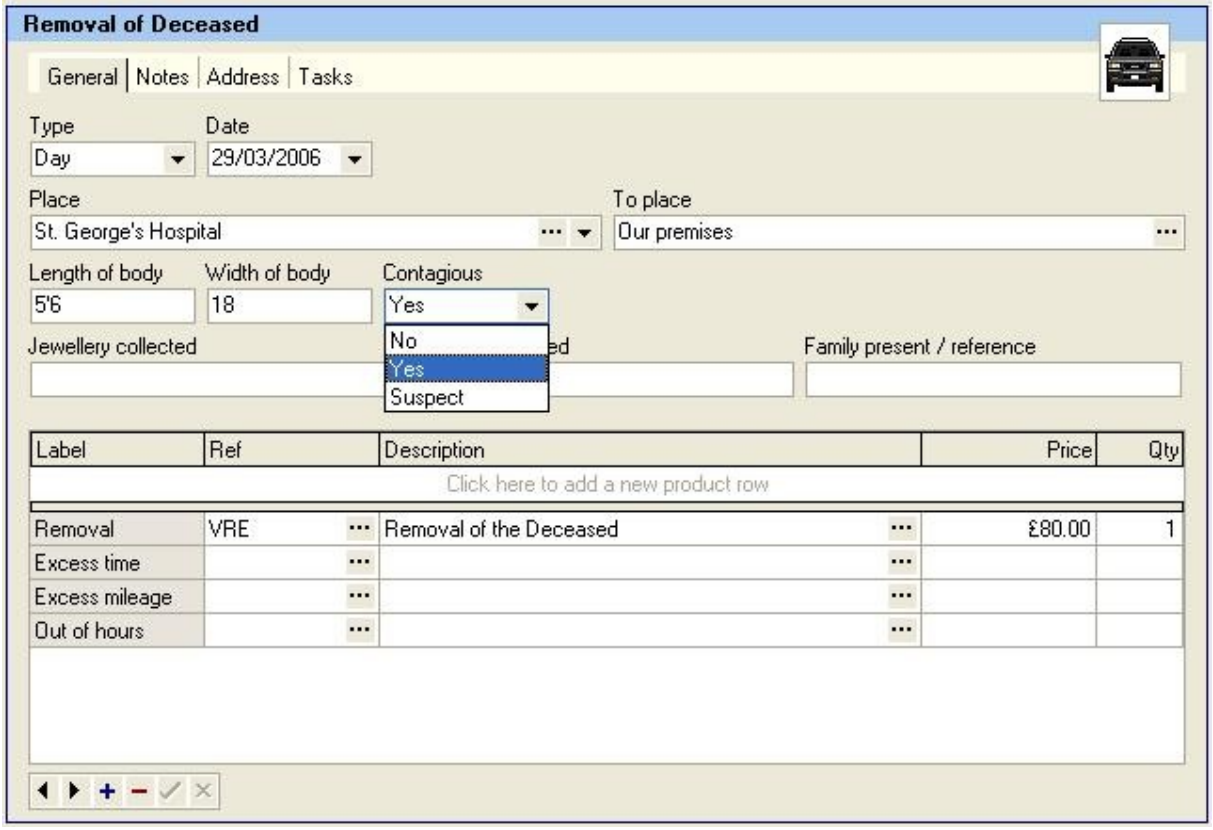
*The screen shot below shows the '**Other file...**' option highlighted following selection of the **Lines** button in one of the contact files. Selecting this will give you the option to open up any one of your contact files. This function is available whenever a contact file is opened, by using the **Lines** button.*



Option type fields

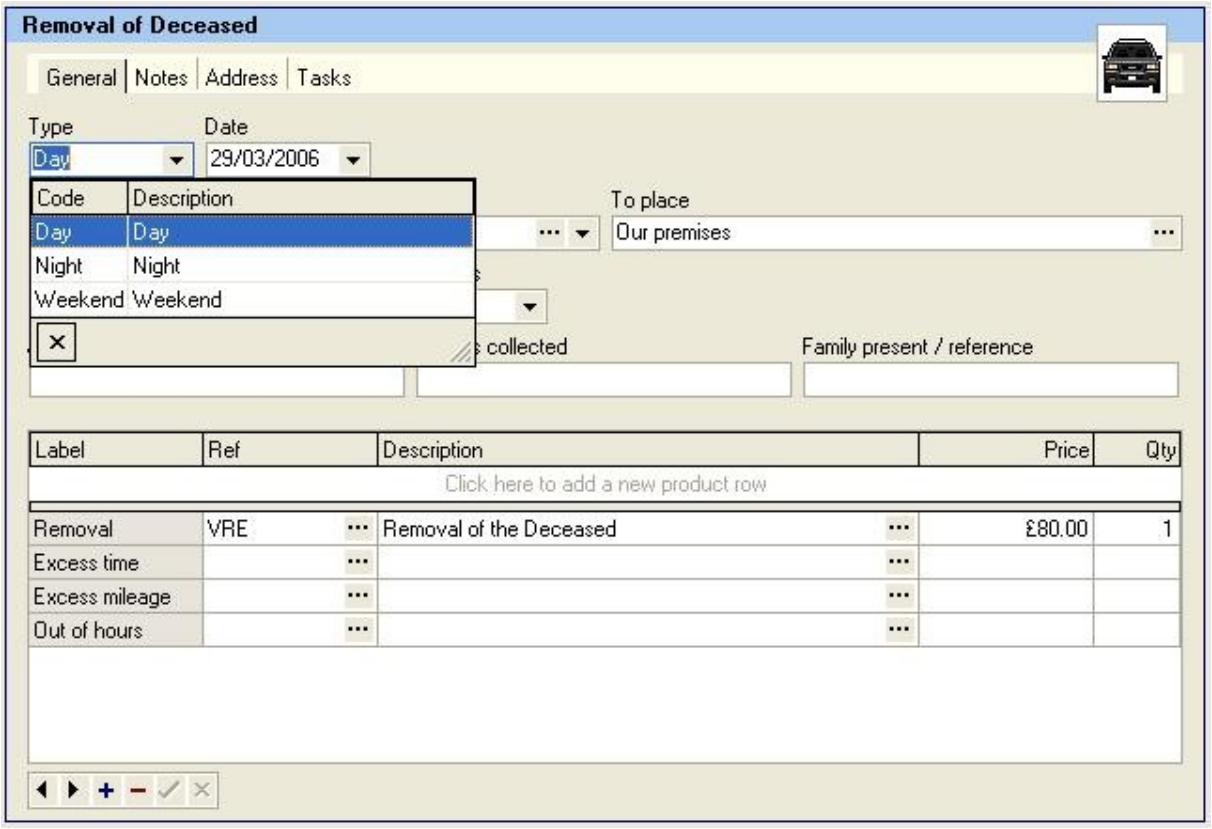
Option fields allow you to choose from predefined options. An example of this is the 'Contagious' field in the 'Removal' service. This basically allows you to choose 'No', 'Yes' or 'Suspect'. Simply click on the small down arrow to be presented with the available options.

The screen shot below shows the available options for the 'Contagious' field.



Some option fields are linked to the Product part of the window. This means that when you select a particular option, a particular product will automatically be inserted in one of the product lines. In this particular configuration of the 'Removal' service, the option field 'Type' is linked to a product line. There are 3 different options, 'Day', 'Night' and 'Weekend'. Each of these options is linked to a different product. All are obviously removals, but they all carry a different price. As already mentioned, selecting a particular option will automatically fill in the product line, but the product line can be manually changed if required. To manually change the product lines click on either set of the 3 dots (...) on the product line. This will then open up the product file. You can then manually select the product you require. The sale price can always be changed manually as well. This will only affect the particular funeral you are making the changes in.

The screen shot below shows the 'Type' field selected to 'Day'. Note that the product line has been automatically entered with the standard removal price. Selecting 'Night' or 'Weekend' would fill in a different product and price.



General text fields

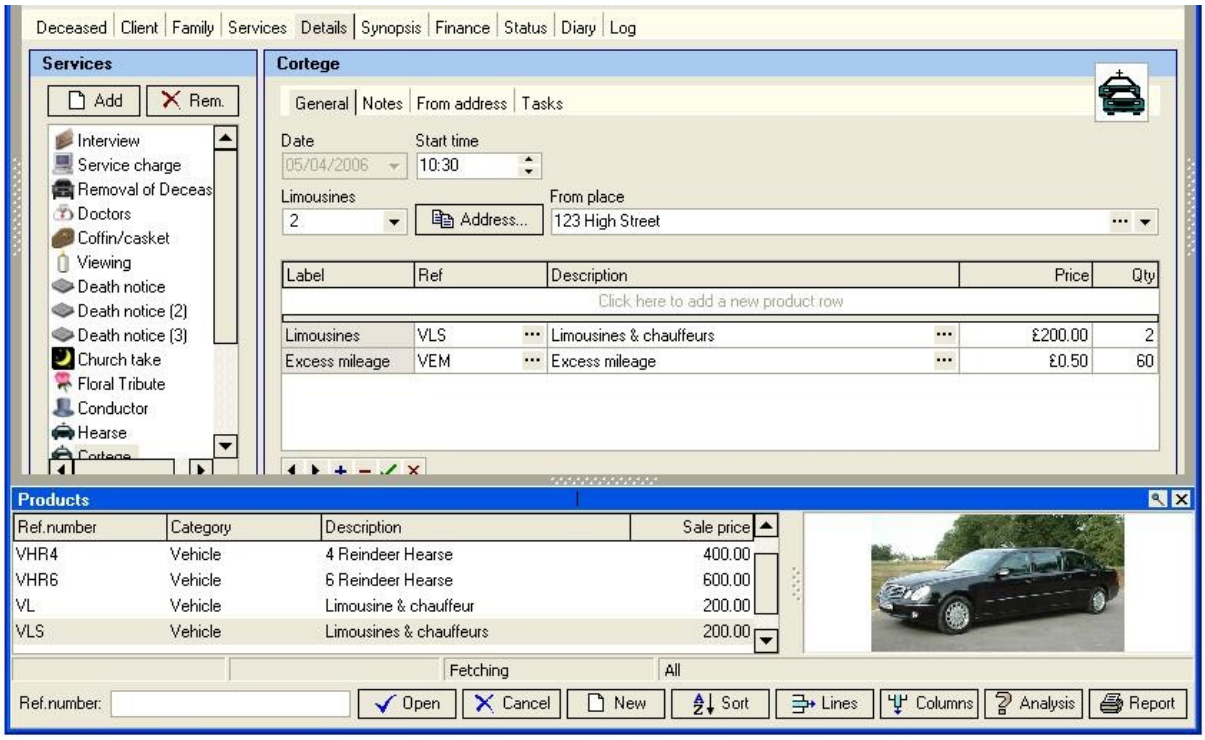
Fields without any buttons at the right hand side are generally plain text fields. Here you simply type in the data you require. For example, the size of the body is simply typed in.

Products

The lower part of the General window is where products and prices can be entered for a service. Not all services will carry the product section as products and prices may not be part of a service. For example, the 'Interview / arrangement' service does not carry any products in this case. The service is there simply for recording where and when the interview took place. This can be used to populate the diary and can also be used at a later date for analysing the funeral data.

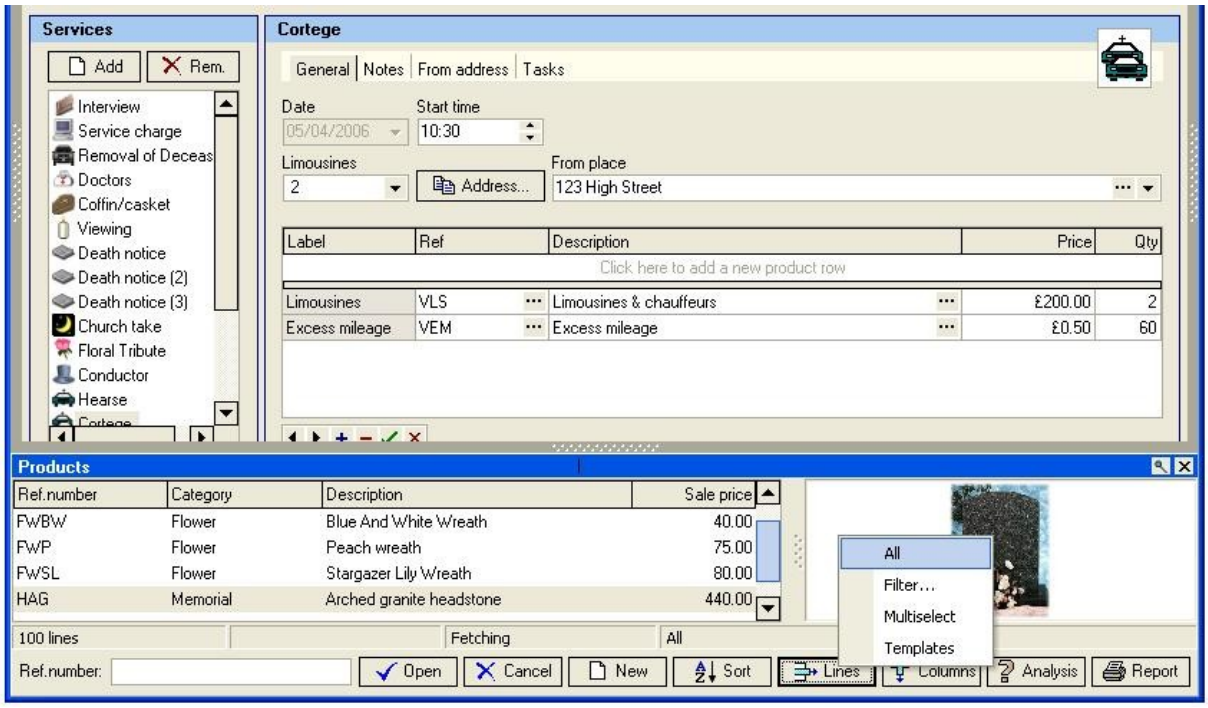
To select a product line you simply click on either set of the 3 dots (...) on the product line. The first set of 3 dots will open up the product file in *Reference number* order, whilst the second set will open up the same product file in *Description* order. The product file may also be filtered. For example, if you are in the Cortege service then the product file will generally be filtered to show the *Vehicle* category of products only. This makes product selection easier as you do not have to look through the whole list of products.

The screen shot below shows the product file opened in the Cortege service and only displaying products in the Vehicle category.



You can of course select to view the whole product file if you need to. Simply select the **Lines** button in the bottom of the screen and then select **All**. The whole product list will now be displayed for selection.

*The screen shot below shows the **Lines** button selected, along with the **All** option.*



The product line can also be manually typed into if so desired. This is not advisable as it may affect analysis of data at a later stage. Prices can however be adjusted as required. Changing the price will only affect the funeral you have changed it on.

H.1.6.3 The Details page – Notes

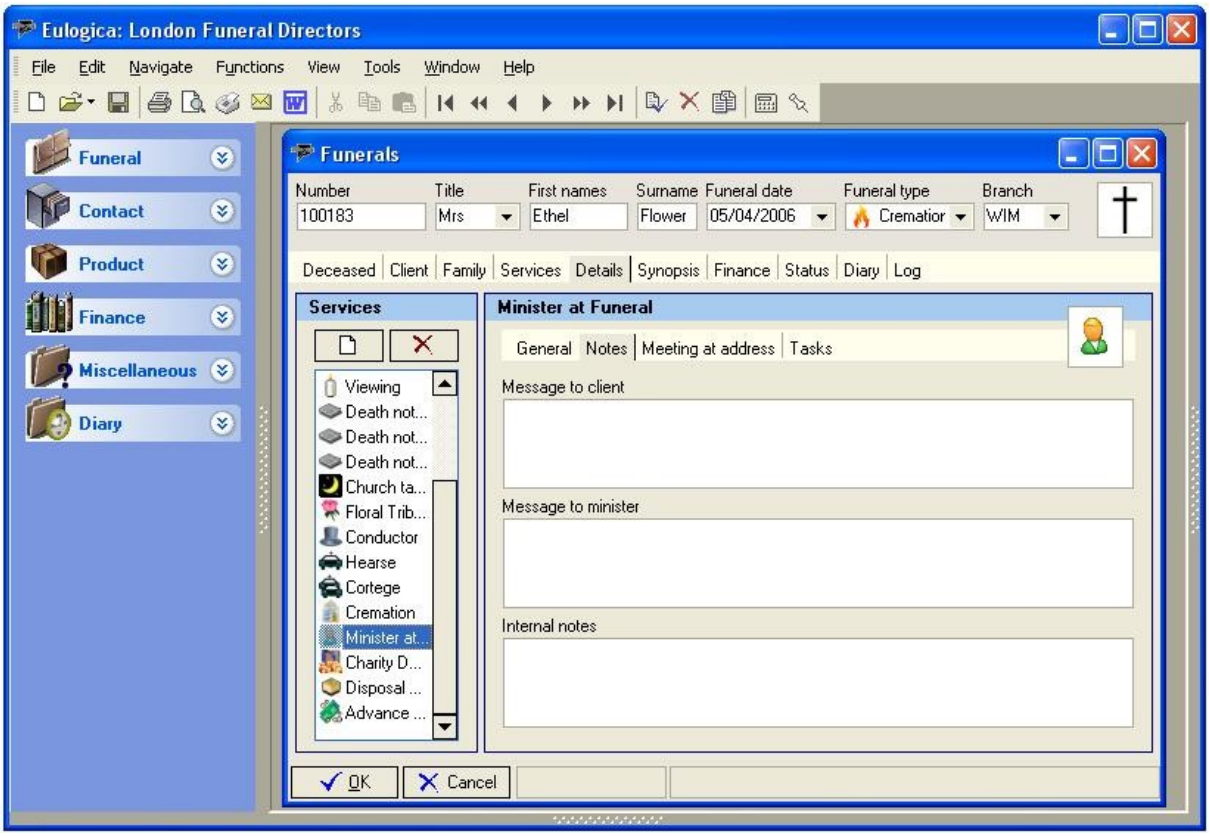
The 'Notes' page is available for all services. This is an area where you can write additional text that you may want either the client, minister or internal people etc to see. This text will then appear on certain printouts which are available to you. The service you have selected will dictate what 'Notes' fields are available. Most services will have the fields labelled 'Message to client' and 'Internal notes'. Other services will also have additional fields. For example, the 'Minister' service will have an additional field labelled 'Message to minister' and the 'Charity donations' service will have an additional field labelled 'Message to charity'.

Basically, the field labelled 'Message to client' will printout on documents like the client confirmation letter. So, if you wanted to add some additional text about a particular service that you wanted the client to see, you would enter it here.

Similarly, if there is something you only wanted printed on internal documents, like a work sheet or coffin request, then you would type the information in the internal notes field. It must be noted that these 'Notes' fields are available for all services, but filling in text in one particular field will not necessarily ensure it is printed on a certain document. For example, any text entered in the 'Internal notes' field of the 'Hearse' service will not print any additional text on either the 'Removal form' or the 'Coffin request'. To get additional internal notes printed on these forms you must use the 'Internal notes' field in the relevant service. In the case getting additional text on the 'Coffin request' form, you

would use the 'Internal notes' field on the 'Coffin/casket' service. Likewise, to get additional text on the 'Removal form' you would use the 'Internal notes' field on the 'Removal' service.

Where a particular service has additional notes fields for things like the Minister, Charity, Supplier etc, then filling in these fields will generally put additional text on documents specific to that person. For example, on the 'Ministers' service there is a notes field labelled 'Message to minister'. If you fill in this field then the text will appear on the ministers confirmation letter, however, it will not appear on the client confirmation letter. The same applies for all other specific notes fields like the 'Message to charity' notes field on the 'Charity donations' service etc.



H.1.6.4 The Details page – Address

Where there is an address field on the 'General' page then there will also be a separate address page. This simply gives the full address details if selected from one of the many contact files. This page also gives you the *Map* button which allows you to use the internet and your web browser to display a map of the address. Please note that an internet connection is needed to enable this service to work.

H.1.6.5 The Details page – Tasks

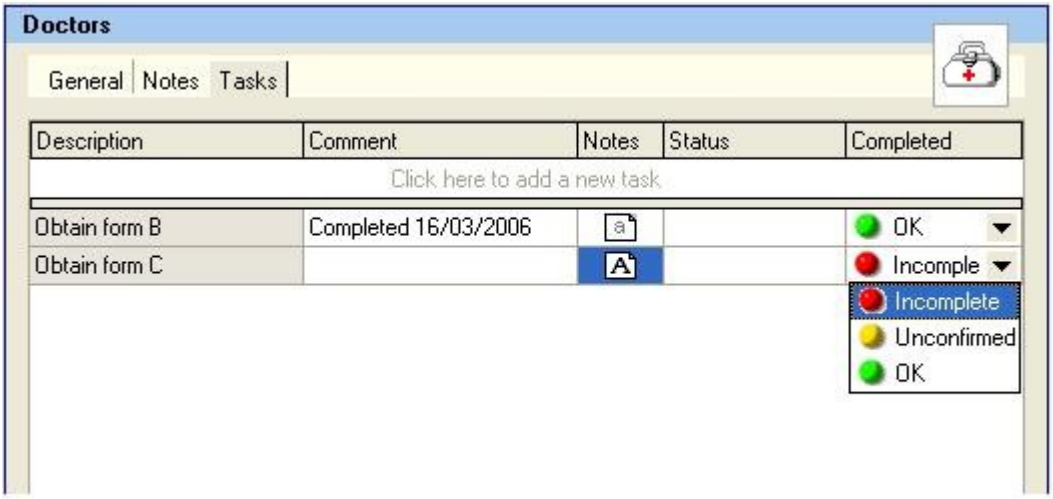
Each service can have either a single task, or multiple tasks associated with it. This allows an electronic check list to be created for a funeral. The tasks can be set up to suit your own company and preference. Contact your software provider if you require tasks to either be set-up or amended. It is not something which has to be used and will not affect the way the system works in anyway.

The tasks can be viewed in 3 ways. Firstly, by selecting the particular funeral, going to the Details page and then looking at the Tasks page for a particular service. This will only show you the tasks for the selected funeral and the selected task.

Secondly, you can view the lists of all tasks for a particular funeral by selecting the funeral and then viewing the 'Status' page.

Thirdly, under the main menu, Miscellaneous menu is an option for viewing all incomplete tasks. This will present you with a list of all incomplete tasks for all funerals.

An example of the task function can be seen in this example of the 'Doctors' service. This service is used when Forms B & C are required for cremation. It allows you to enter the Doctors details and also enter the price for the cremation forms.



As can be seen from the above screen shot, the Task page is made up of five columns:

Description: a description of the actual task. This will be set up by your software provider.

Comment: a small text field for you to add a comment.

Notes: a larger text field to enable a much longer comment to be added. You will notice that in the above example the Notes icon for the first task has a lower case 'a', whereas the Notes icon for the second task has an upper case 'A'. The upper case 'A' denotes that there is text in this field.

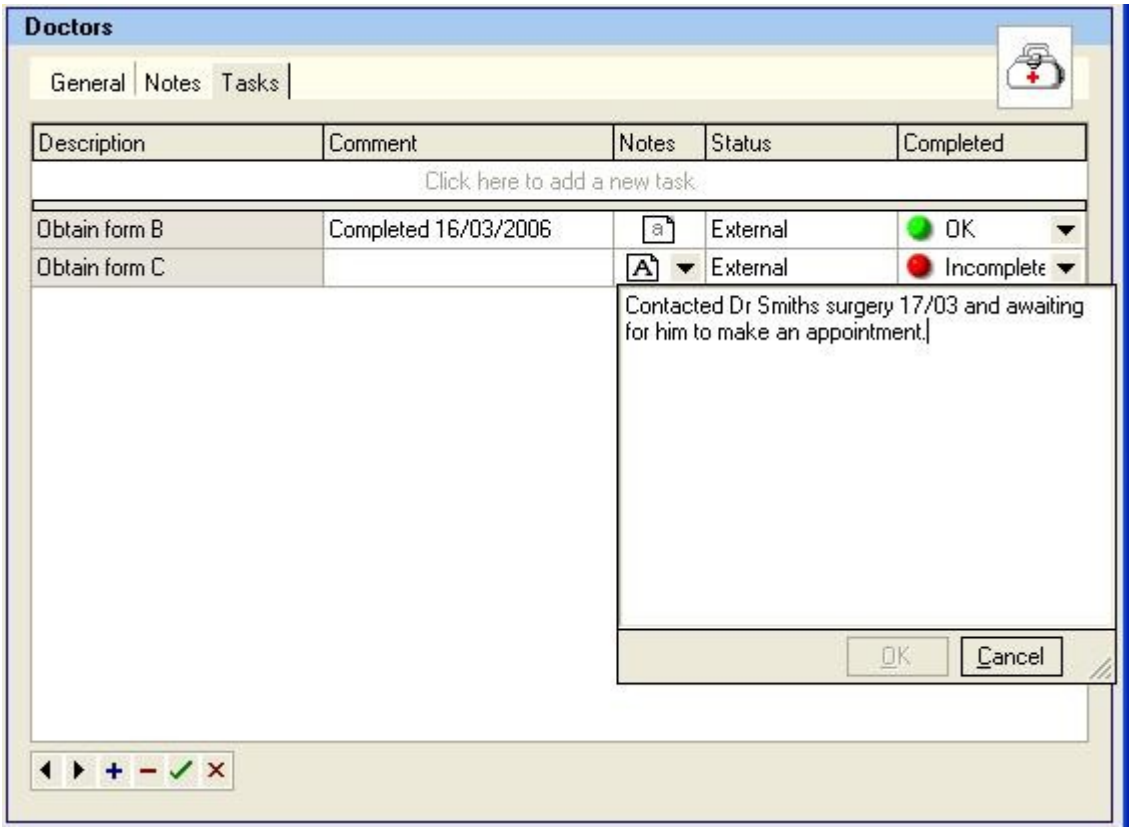
Status: an option field currently set up to show 'External', 'Family' or 'Internal'. These options can be edited.

Completed: an option field with the following options:

- Incomplete: Use when task not completed
- Unconfirmed: Use when partially completed
- OK: Use when complete and no further action required

This particular set-up of the 'Doctors' service has 2 tasks associated with it. The first task is to 'Obtain form B' and the second is to 'Obtain form C'. As can be seen, the first task is completed and a short comment has been added. There is also no text in the longer comment field of this task. However, the second task is still marked as incomplete and also has text in the long comment field. By clicking on the '**A**' symbol in the notes column you can view / edit the text in this field.

The screen shot below shows the contents of the long text field.

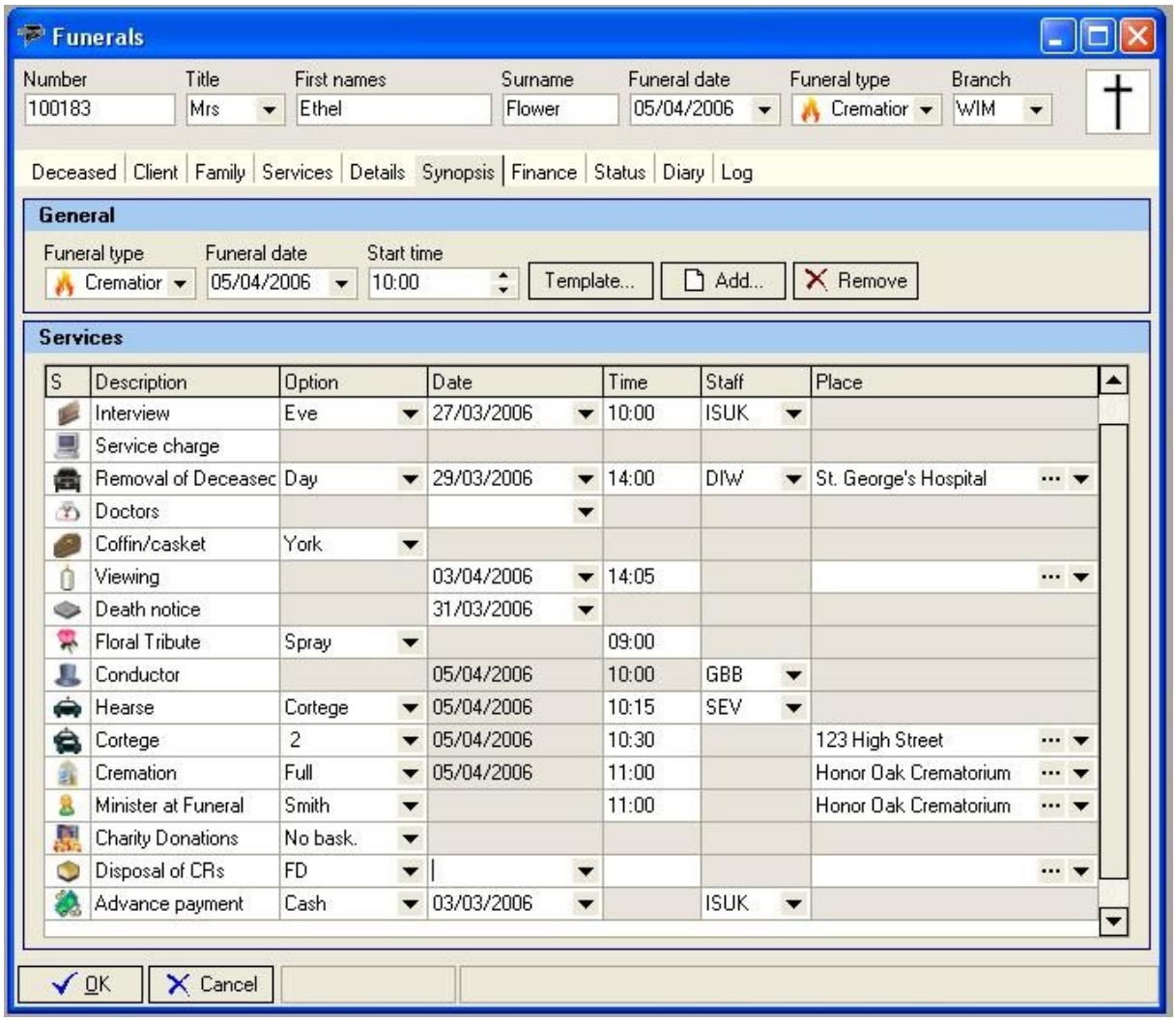


H.1.7 The Synopsis page

The synopsis page shows an overview of certain items of all the selected services. These items include time and date fields, place fields and certain option fields. The synopsis page is a good place to look at all the various timings for a funeral without having to switch between the different services. Details can be edited in the synopsis page and they will be reflected in the individual services.

It can look very confusing at first, but after studying the page for a while and using it you may find it very useful.

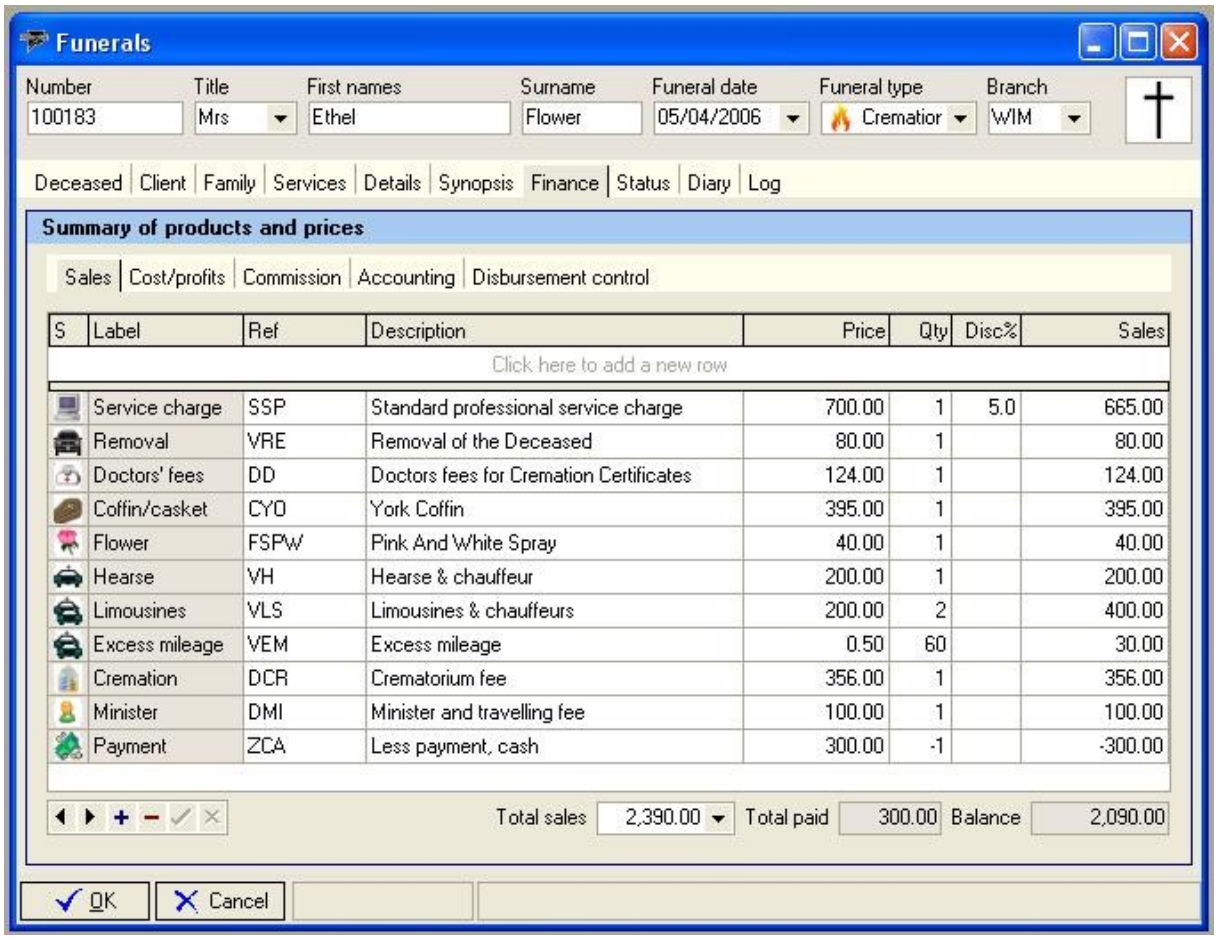
The screen shot below shows a sample Synopsis page.



H.1.8 The Finance page

The Finance page shows an overview of all the products and prices within a funeral. As you enter the details and prices of the various services, this page is then created. The prices in the Finance page are editable and will reflect in the individual services. Again, any prices changed here will only affect the particular funeral you are in. Any changes to price should be made in the *Price* column rather than the *Sales* column. You can also change the quantity of items, as well as entering a particular discount. Simply enter the percentage discount you want to give in the *Disc%* column and the software will calculate the sale price.

The screen shot below shows an example of the Finance page.

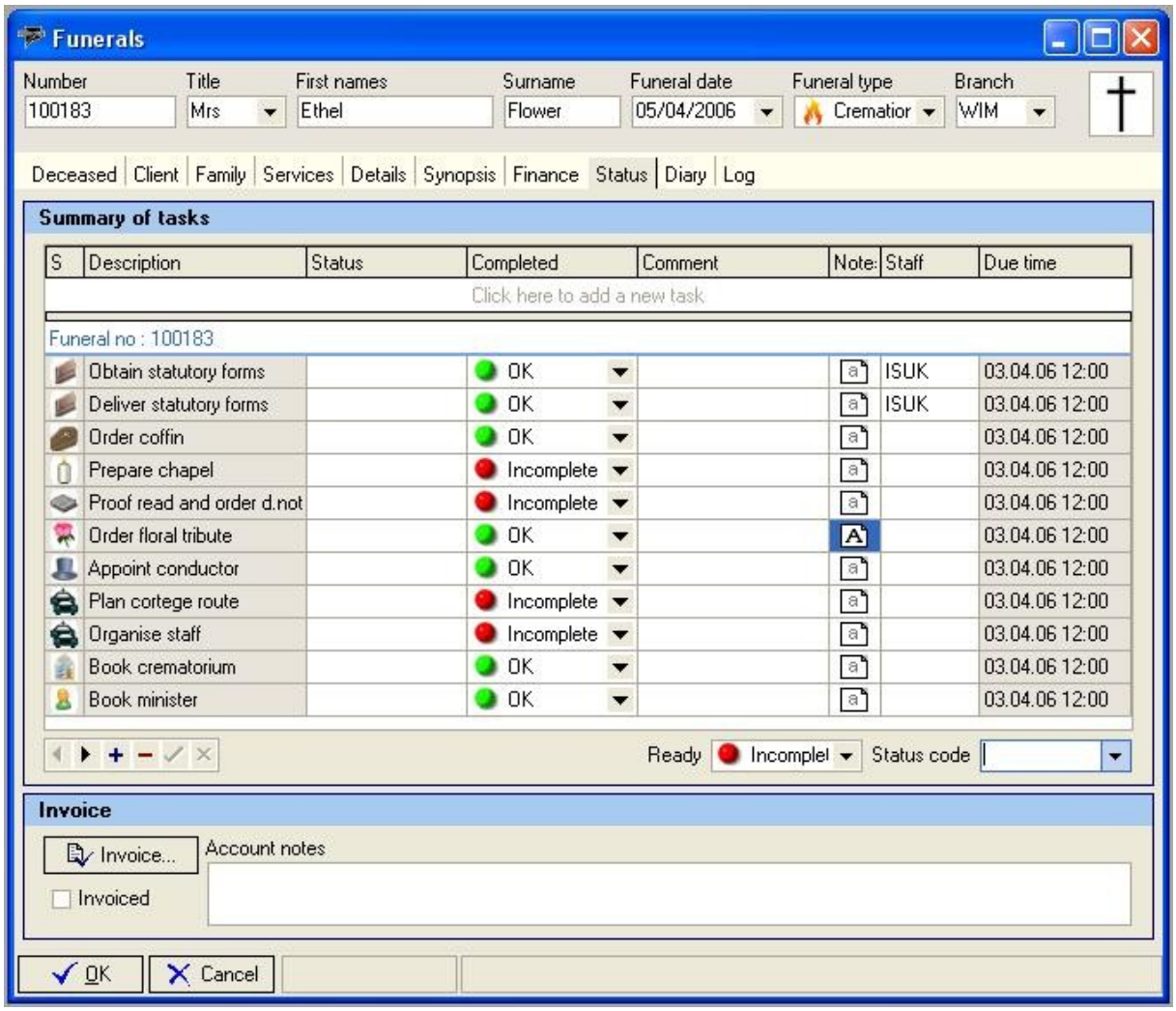


S	Label	Ref	Description	Price	Qty	Disc%	Sales
	Service charge	SSP	Standard professional service charge	700.00	1	5.0	665.00
	Removal	VRE	Removal of the Deceased	80.00	1		80.00
	Doctors' fees	DD	Doctors fees for Cremation Certificates	124.00	1		124.00
	Coffin/casket	CYO	York Coffin	395.00	1		395.00
	Flower	FSPW	Pink And White Spray	40.00	1		40.00
	Hearse	VH	Hearse & chauffeur	200.00	1		200.00
	Limousines	VLS	Limousines & chauffeurs	200.00	2		400.00
	Excess mileage	VEM	Excess mileage	0.50	60		30.00
	Cremation	DCR	Crematorium fee	356.00	1		356.00
	Minister	DMI	Minister and travelling fee	100.00	1		100.00
	Payment	ZCA	Less payment, cash	300.00	-1		-300.00

H.1.9 The Status page

If you decide to use the tasks as described in **The Details page – Tasks** then this page will show all the tasks for this particular funeral. This page has the same functionality as the Tasks tab in the Details page but simply shows all the tasks involved with a funeral.

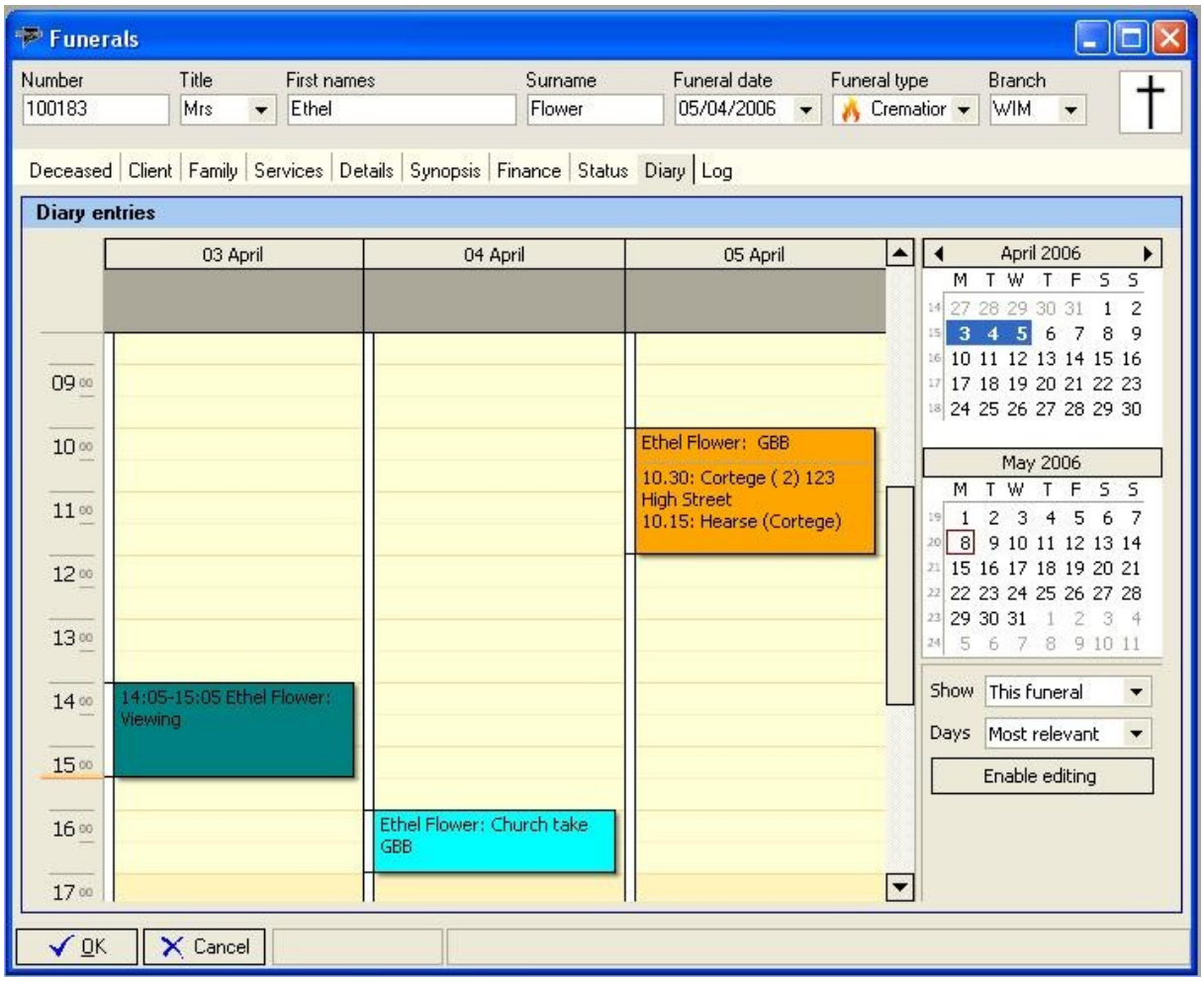
The screen shot below shows a sample Status page.



H.1.10 The Diary page

The diary page has the same functionality as the main diary but simply filters out all other entries except the ones to do with the selected funeral.

The screen shot below shows a sample 'Funeral' diary page.



I Invoicing

I.1 Introduction

Once a funeral is complete and ready for invoicing you can use Eulogica to generate the invoice and then keep track of payments and outstanding invoices. You can also use Eulogica to generate reminder letters and make notes of any reminders you have sent or phone calls you have made to a client.

Eulogica creates a separate invoice with its own invoice number for each funeral you enter. This is a separate number to the funeral reference number and depending on your installation you may or may not wish this to be visible on the actual invoice. The reason for creating a separate invoice number is to ensure an accurate accounting record is kept if any changes need to be made to the invoice once it has been raised.

Once you have raised an invoice and posted the invoice, you 'lock' that invoice in Eulogica. This ensures no changes can be made to that particular invoice as it has been posted to the client. Should you need to make changes to the invoice after this time, a credit note for that invoice can be generated which will also have its own invoice number. The funeral record can then be amended and a new invoice can be raised. This ensures an accurate record of all changes are kept and so a particular funeral record with one 'funeral' reference number can have more than one invoice number.

A separate Client contact record is also generated when you invoice a funeral and is added to the Client contact list. This will allow you to look at the account history of this particular client to keep track of what has been invoiced and what payments have been made. There are various ways to access the Client contact file, one of them being by going directly to **Contact | Clients** and selecting the particular client. You can also access these records directly from the **Funeral** record, the **Invoice** and the **Accounts receivable** section. These will be explained in the relevant sections.

I.1.1 Preparing to invoice

Once you are ready to invoice a client you should check that all details entered in the funeral record are correct. Some of these details will be used to generate the address for the invoice along with specific wording to appear on the invoice. This will depend upon the configuration of your system. Prices will also need to be carefully checked and an overview of all prices can be seen on the **Finance** tab of the Funeral record. It is also important to ensure that the Funeral reference number is correct, as once the funeral is invoiced this number cannot easily be changed.

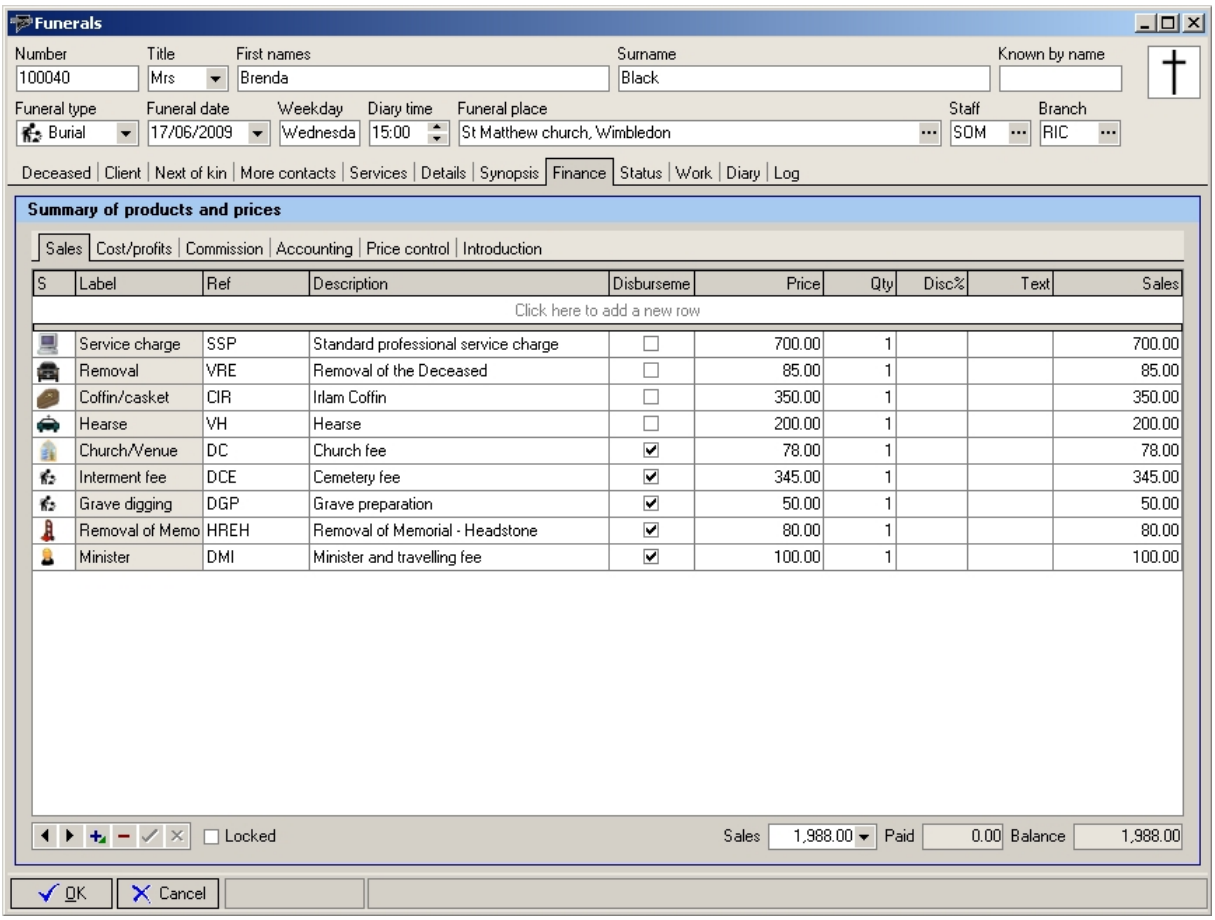
Within the **Finance** tab there are various other tabs. The main ones to use are the **Sales** tab which is initially shown by default, and the **Accounting** tab.

I.1.1.1 Finance – Sales tab

The 'Sales' tab gives an overview of all products and prices previously entered in the 'Details' section. Here you can see the icon where the product has been added, the reference number of the product, the description of the product, if it is a disbursement, the price, the quantity, any discount given and finally the total sales price of that product line.

Items may be changed in the **Finance - Sales** tab and these will then be reflected back in the 'Details' section. At the bottom of the page you will also see the total sale price, the total of any payments already made and a balance payable. You can also change whether or not a product is a disbursement by ticking the box in the disbursements column for that product row.

*The screen shot below shows an example of the **Finance - Sales** page.*



I.1.1.2 Finance – Cost/Profits tab

The **Cost/Profits** tab againshows an overview of all the products and prices previously entered. However, along with the sale price of each product, here you can see the cost price and profit levels for each product. At the bottom of the window there are total for cost, profit and profit %.

I.1.1.3 Finance – Accounting tab

The **Accounting** tab again shows an overview of all the products and prices previously entered. The difference is that only the total sales price of each product line is shown. Additional information is shown with regards to nominal codes (used for accounting purposes), whether the product is a professional charge or a disbursement and VAT related information. Depending on your installation, prices may have been set exclusive or inclusive of VAT. This will change what amounts are shown in the VAT columns. The following list gives more detail about some of the accounting columns.

Category: shows what category a particular product has been set up in.

Nominal code: shows what nominal code has been allocated to a product.

Index: shows the sorting order of the products, explained below.

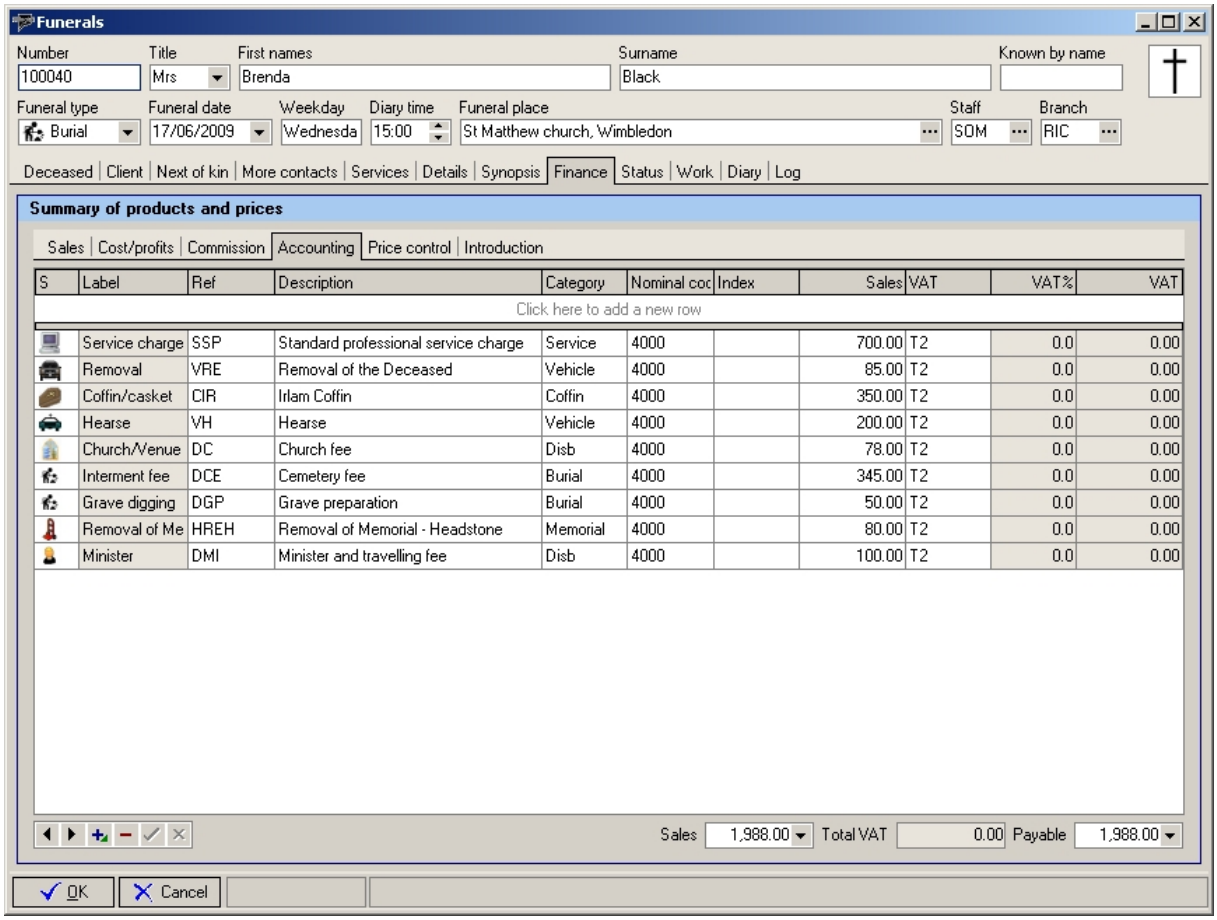
Sales: the total sales price of a product, including any multiplications of quantity.

VAT: what VAT code a particular product has.

VAT %: what rate the VAT is set at.

VAT: what the actual VAT amount is.

All the above values can be changed and these will then be reflected throughout the funeral record.
*The screen shot below shows an example of the **Finance - Accounting** page.*



The main reason for using the **Accounting** tab is to ensure products are set up correctly to be either a disbursement or a professional charge and that the correct VAT codes are set (should this be applicable to your installation). These parameters are initially set up when the products are entered in the product file. Occasionally entering a product manually might require that these parameters are amended to ensure the item is placed in the correct place on the invoice and also that the VAT amounts are correct (if applicable). Note that, depending on your invoice style, changing the **Disb**(ursement) setting will affect where a product appears on the invoice. Further to this, changing the **Index** value will change the order that the products will appear on your invoice. The higher the index value, the further down the list the item will appear.

For example, if you wish for a specific item to appear at the end of your disbursements list then make sure the Index value for that disbursement product is higher than that of any other disbursements.

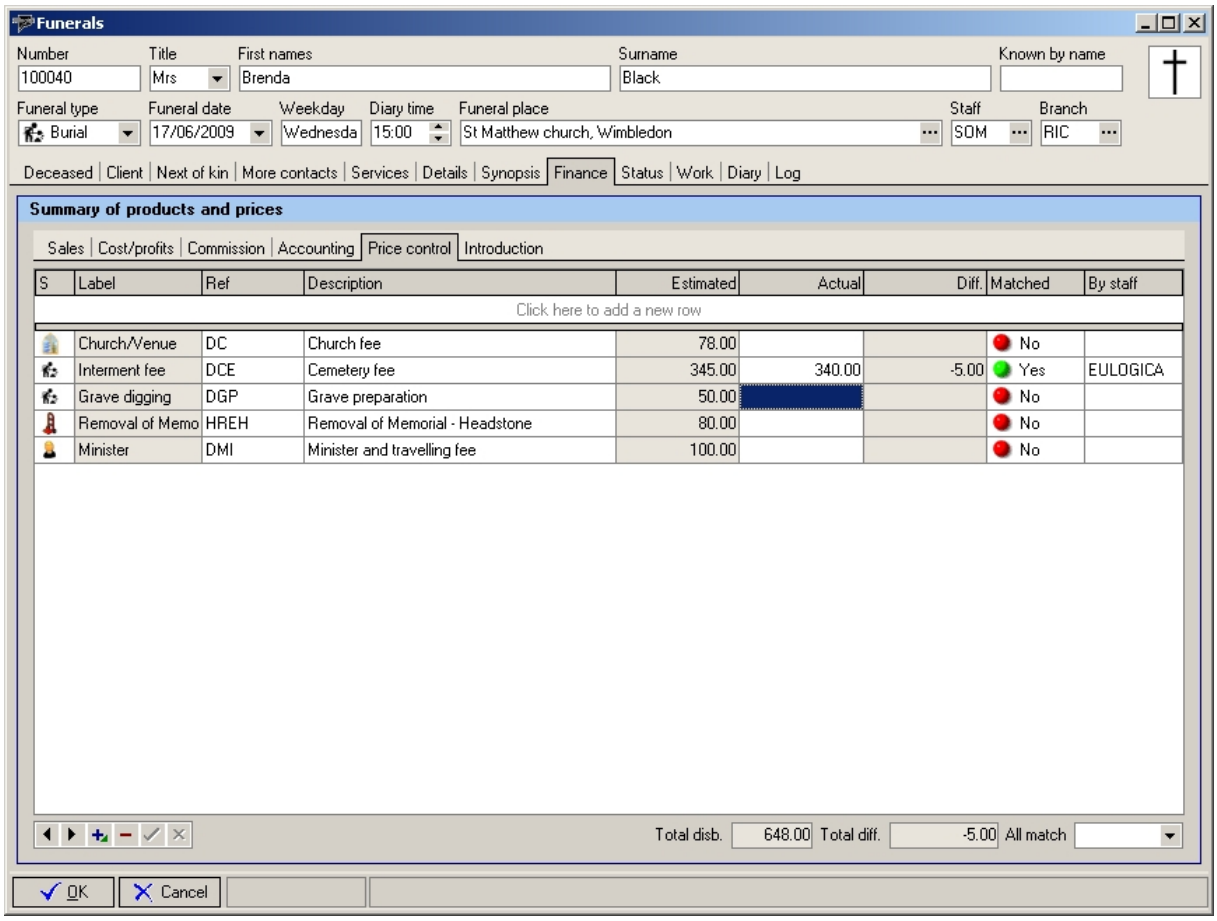
I.1.1.4 Finance – Price control tab

The Price control tab is designed to enable you to fill in any estimated disbursement costs with the correct amount once a sales invoice is received from your supplier.

For example, an estimated price might have been given for a Death notice which was slightly different to the actual price when the invoice from the newspaper is received. Filling in the correct amount in the **Actual** column of the **Price control** tab will change the actual price (including the price in the individual icon) but leave the estimated price in the **Estimated** column which was given initially. The actual price could simply be entered in the **Sales** tab or the actual icon of the service, but this will not record the initial price given to the client on the estimate.

As the actual prices are entered in the **Price control** section, any differences, either plus or minus, are shown in the **Diff.** column. The **Matched** status will then go to green and the staff initials are also recorded. At the bottom of the screen **Total disbursements** are shown. The **Total difference** box will change as actual prices are entered. Also, there is the **All match** box which is a manual Yes / No option for your own benefit.

*The screen shot below shows an example of the **Finance - Price control** page.*



I.2 Raising the invoice

Once you are happy with all the figures etc, it is time to raise the invoice. To do this you must now move to the **Status** tab within the funeral window. At the bottom of the **Events** section you will see the **Action** button. Click this button to show the list of options available. At this point you should have two options – **Create client record** and **Raise invoice**. You will notice other options that are not available. Some of these will become available when the invoice has been raised.

*The screen shot below shows the **Action** button on the **Status** tab.*

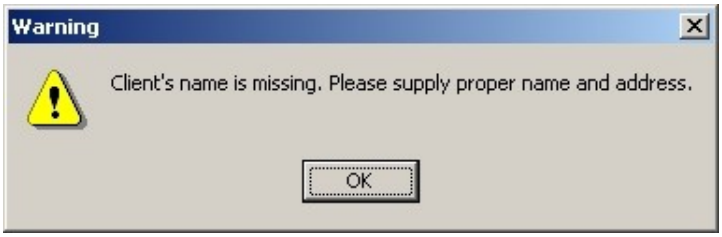
In the above screen shot you will notice that the **Locked** label is not yet ticked. This shows that this funeral has not yet been invoiced. Clicking this tick box will give you the same options as pressing the **Action** button.

To invoice the funeral simply click on the **Action** button and choose **Raise invoice**. You will then be presented with a warning as shown below. This is basically telling you that this funeral record will now be locked and that further changes to the finances on the funeral record will not be possible. Items like charity donations will still be available for editing however.

Selecting **No** will simply mean you will remain in the funeral record without raising an invoice.

Selecting **Yes** will raise a new invoice and close the funeral record.

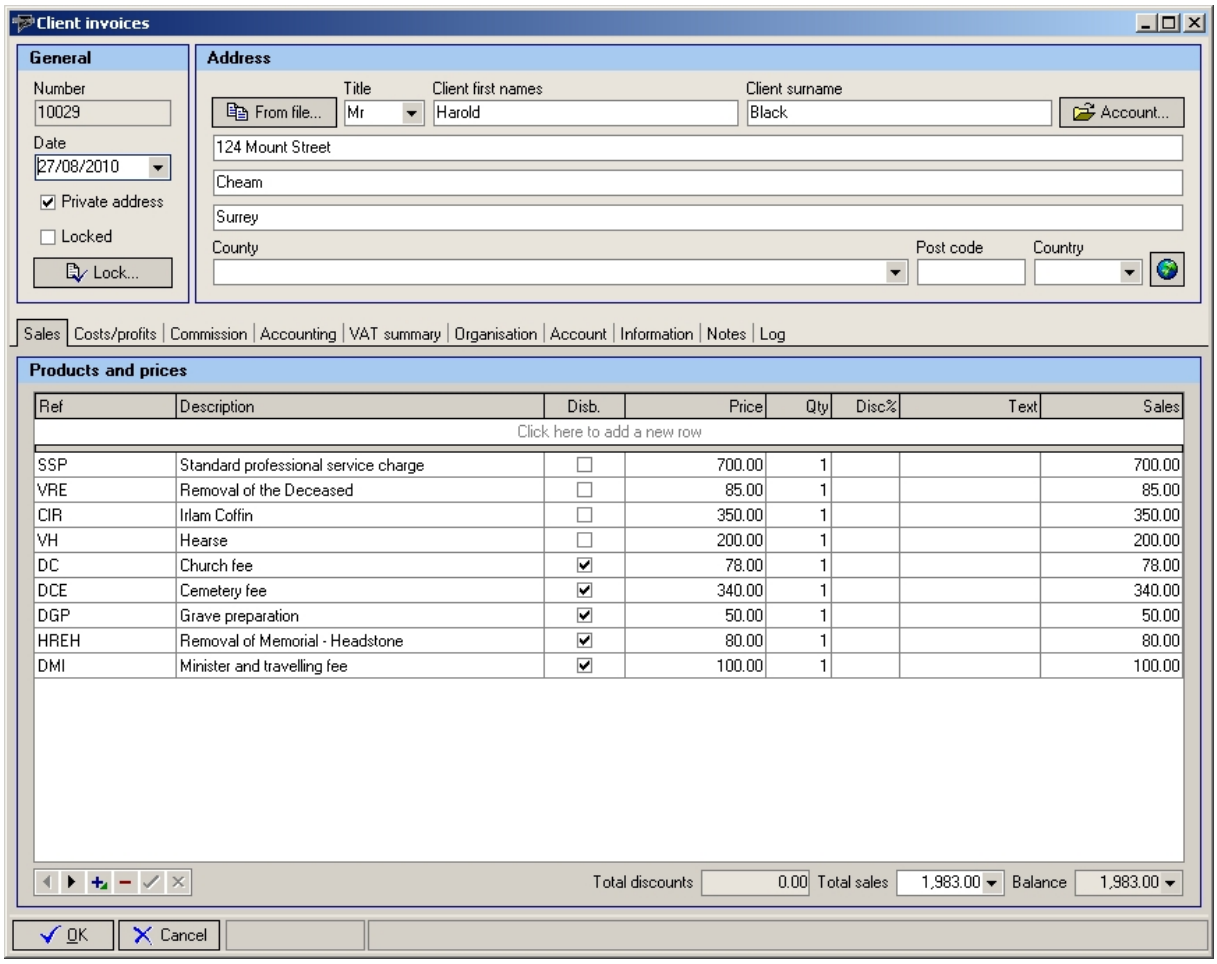
If you have not entered the clients name or post code you will be presented with warnings as shown below.



If you selected to **Invoice to another address** in the Client tab, then you will also get similar warnings if the Invoice to name or post code are missing. The system will accept a 'space' as a post code if you do not know the post code of the Client or Invoice to address. This is simply a feature to try and ensure post codes are entered.

If the client details are correct the funeral window will close and you will be presented with a new window containing the clients name and address, the various products from the funeral record and various tabs, some of which are identical to the funeral record **Finance** tab as described earlier.

The screen shot below shows an example of the invoice screen.



One of the things which you may want to amend in the Invoice window is the **Invoice date** which can be found in the **General** section. By default this is the date you raise the invoice but can be set up to default to the **Funeral date** if so desired. To amend simply use the small arrow next to the date to open a calendar or type the date in the date field.

The only other items you may wish to change are located in the **Account** tab and the **Organisation** tab**.**

I.2.1.1 Account tab

The main items you may wish to change in the **Account** tab are as follows:

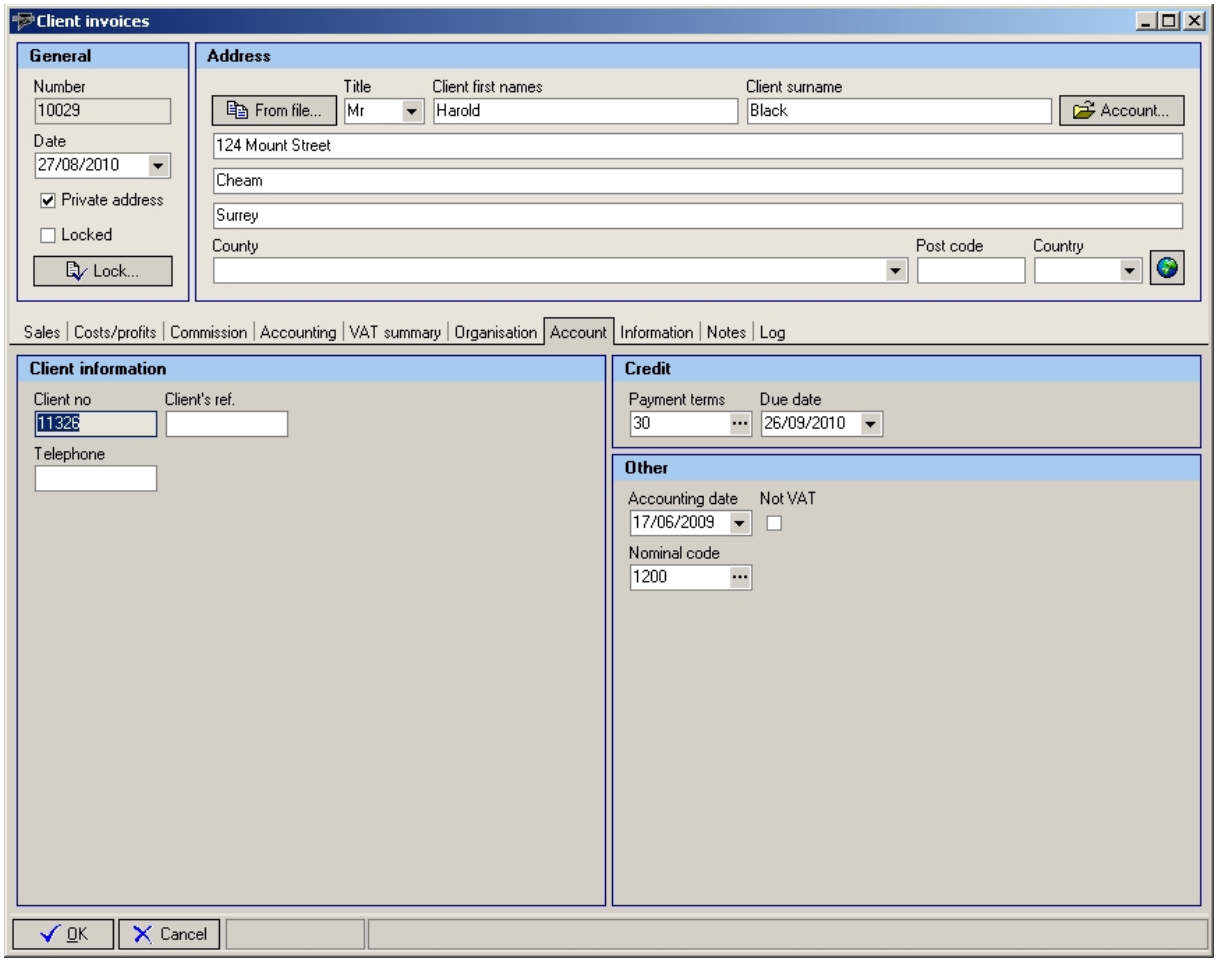
Accounting date: this can be set as a default to either the Invoice **date** or the **Funeral date**, but can also be amended manually. This will be used if transferring data to an accounts package.

Payment terms: these can be set up as a default to your standard credit terms. This will then affect the **Due date** field.

Due date: this will initially depend upon the **Invoice date** and the **Payment terms**, but can also be amended manually should you need to do so. Later on you can use

the **Due date** to filter out unpaid invoices which are past the due date. This can be useful for quickly checking outstanding accounts.

*The screen shot below shows an example of the **Account** tab in the invoice window.*



I.2.1.2 Organisation tab

Fields in the **Organisation** tab will generally be taken from the funeral record. This will ensure the correct letterheads are generated if your system is set up to do this.

The main items you may wish to change in the **Organisation** tab are as follows:

Staff: this can be set to take the staff member from the funeral record or the staff member who is raising the invoice. This can also be amended manually.

Branch: this can be set to take the branch code from the funeral record. This can also be amended but depending on your configuration this may affect any generated letterheads.

Please note, for all types of records, changing the **Branch code** will also change the **Area**, **Region**, and **Brand code**, if such links exist in the **Branch file**. Changing the **Area code** will also change the **Region** and **Brand code**, if such links exist in the **Area file**. Changing the **Region code** will also change the **Brand code**, if such links exists in the **Region file**. These can all affect what letterhead is generated if your system is set up to generate letterheads.

The **Organisation** tab also allows the invoice list to be filtered. When displaying a list of invoices there are options available in the **Lines** menu to limit the list to only the most relevant records:

Mine
My branch
My area
My region
My brand
All

Please see your software supplier for further advice on using the **Organisation** tab.

I.2.1.3 Information tab

You will notice that the **Funeral number** is shown in the **Information** tab with an **Open** button next to it. This allows you to see which funeral record this invoice has been raised from and also to open that record by clicking on the **Open** button.

The **Description** field allows you to change the invoice description. This is shown when you ook at lists of invoices, such as **Accounts Receivable**, in Eulogica.

The **Introduction** box allows you to enter additional text that will appear in the letter part of the invoice when it is printed. For example, you could use this to enter a paragraph that is specific to the client.

I.2.1.4 Printing invoices and cover letters

To print the invoice, any covering letters and envelopes simply use one of the print options in the top menu.

For immediate printouts use the **Print** button which will send the document straight to the printer. For an on screen display of the document before printing use the **Print preview** button which will give you an on screen display before you decide to print. You can also use the **E-mail**, **Fax** or **Word** button options. On selecting any of these buttons you will be presented with the same options but will output the document in different ways.

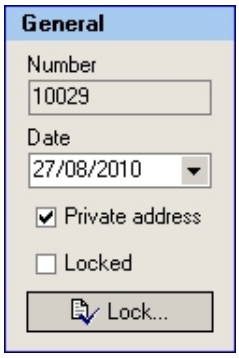
I.2.1.5 Locking invoices

Once you have printed the invoice and any other related documents the invoice must then be locked. Locking an invoice has 2 purposes.

Firstly it stops any further changes being made to the invoice. Once you have posted off an invoice you do not want anybody changing amounts otherwise you will have a discrepancy.

Secondly, the invoiced amount then gets moved into the **Accounts receivable** section of Eulogica. This then allows you to monitor what money has been invoiced and if any of that money is outstanding (i.e. Past your normal terms of payment).

*To lock the invoice, click on the **Lock** button as shown below.*



You will then be presented with a warning as shown below. This is basically telling you that this invoice will now be locked and that further changes will not be allowed.

Selecting **No** will simply mean you will remain in the invoice without locking it.

Selecting **Yes** will lock the invoice and move the outstanding invoice amount to the **Accounts receivable** section of Eulogica.

Once you have locked the invoice you will then see a tick in the **Locked** field. If you then try and make any changes to this locked invoice you will be presented with a warning, as shown below.

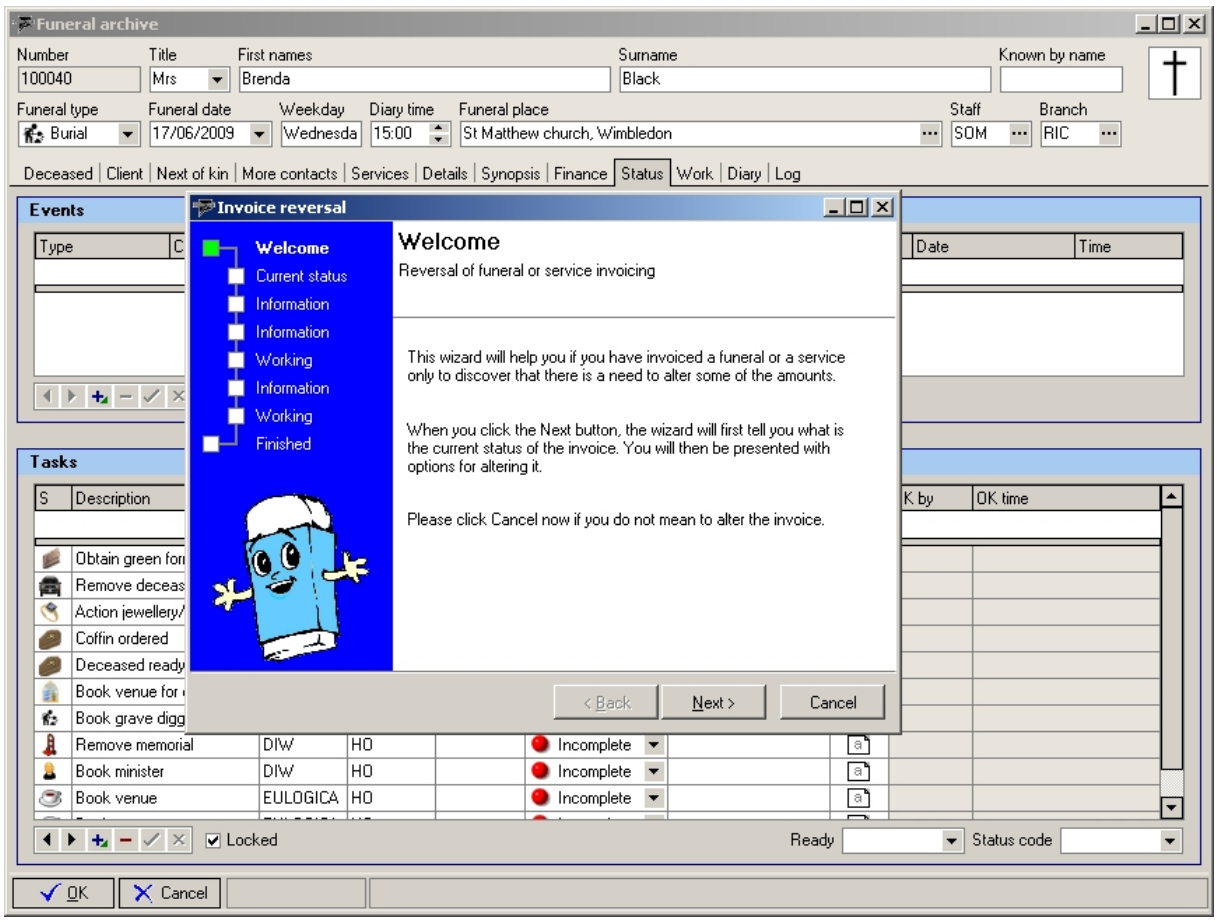
I.3 Correcting invoice errors after locking

If there is a mistake with an invoice or if something needs changing after the invoice has been locked, you will not be able to edit the details on this invoice (or the funeral record).

To make a change to an invoice you will need to credit the invoice and then re-invoice with the correct details. This ensures that an accurate history is kept of all invoice details and that an invoice cannot simply be amended in a haphazard fashion.

Within Eulogica there is the **Reversal wizard**, accessed from the funeral record, which will take you through the process of crediting an invoice. This will basically generate a credit note for the invoice, attempt to remove both the initial invoice and the credit note from Accounts receivable and finally unlock the funeral record ready for editing and then re invoicing.

Access to the **Reversal wizard** can be found by pressing the **Action** button in the **Status** tab of the **Funeral record**. You will notice that the options that appear when you press the **Action** button are now different from before the invoice was raised. Choose the **Reverse invoice** option and the **Invoice reversal wizard** will start up.



The wizard will then guide you through the process of crediting the invoice and unlocking the funeral. The steps are shown below:

- **Welcome**

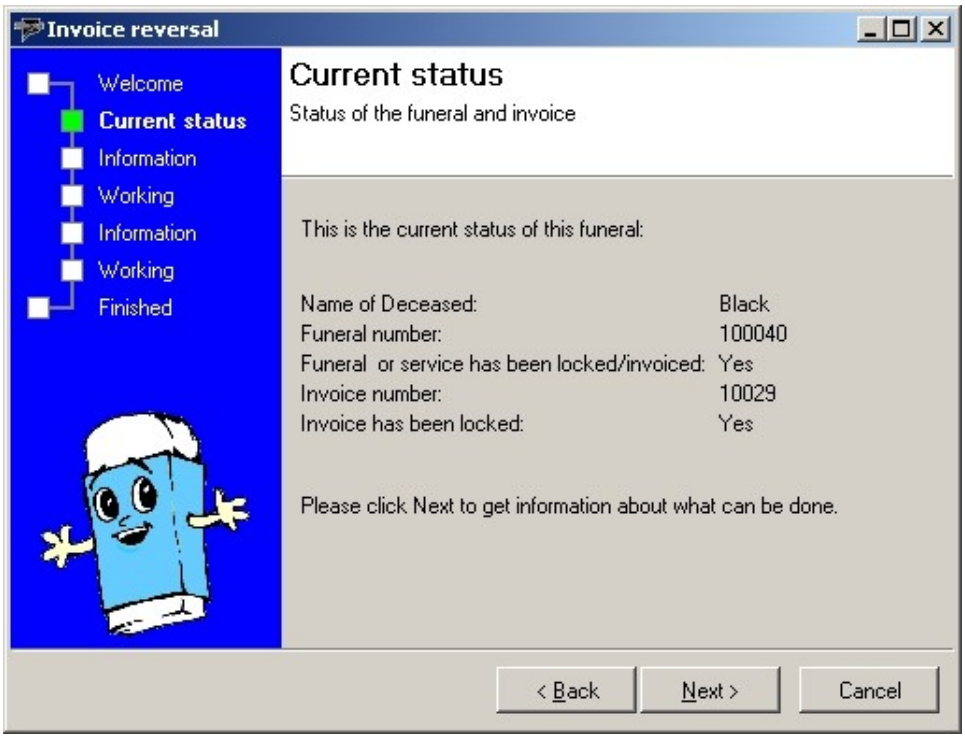
  This is basically a welcome screen telling you what the wizard is for. Click **Next** to continue or **Cancel** to close the wizard.

- **Current status**

  This gives you an overview of the invoice you are about to credit and also the funeral record which is then to be unlocked. Click **Next** to continue or **Cancel** to close the wizard. **Back** takes you to the previous wizard screen.

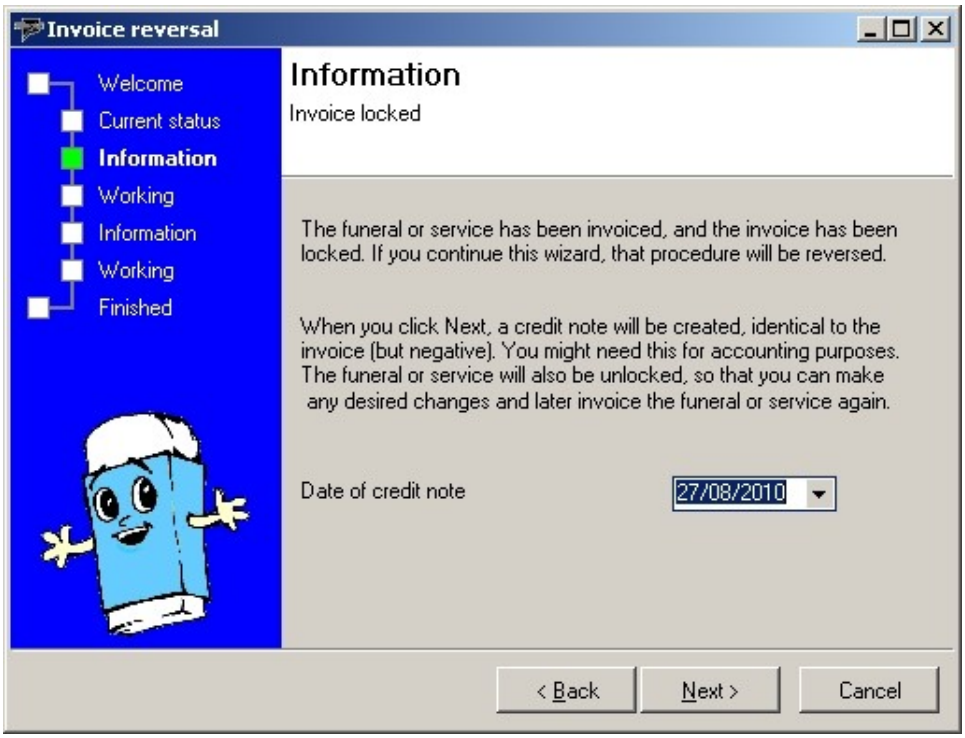
  - It should be noted that the invoice to be credited needs to have been locked to allow the wizard to work. If it not locked you will be warned about this and the wizard will go no further. Simply lock the invoice and start again.

The screen shot below shows the Current status page.



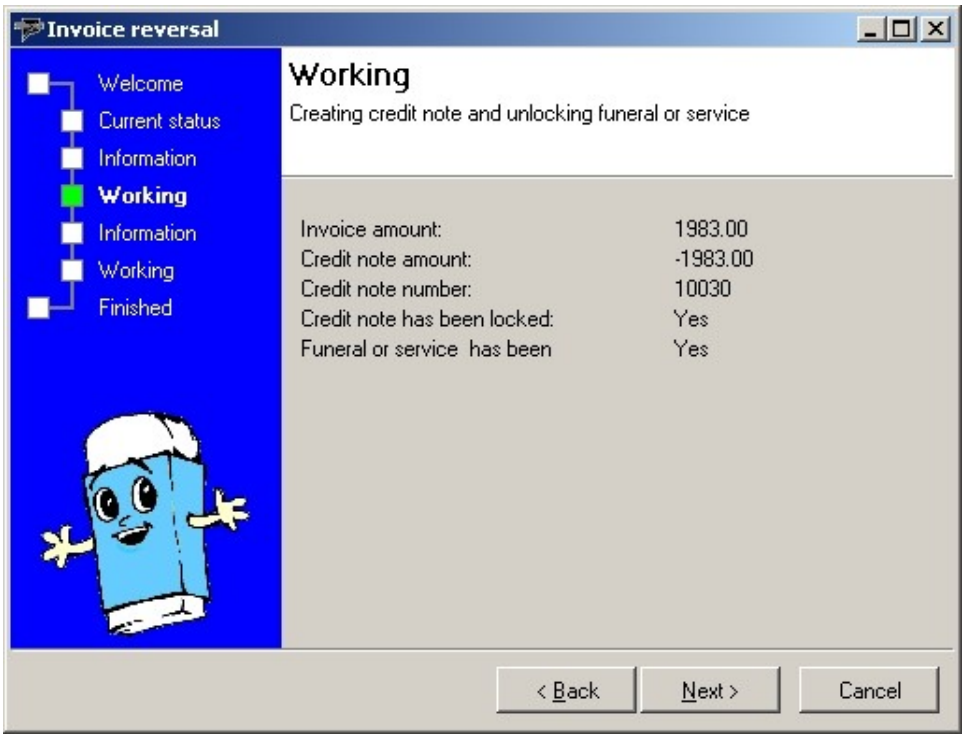
- **Information**

  This lets you know whether the wizard can continue or not depending on if the invoice is locked. If the invoice is not locked the wizard will inform you that changes can be made directly on the invoice. You can do this, however, the funeral finance record information will no longer tally with the invoice. It is best to ensure the invoice is locked and let the wizard take you back to unlock the funeral, make the changes there and then re-invoice.



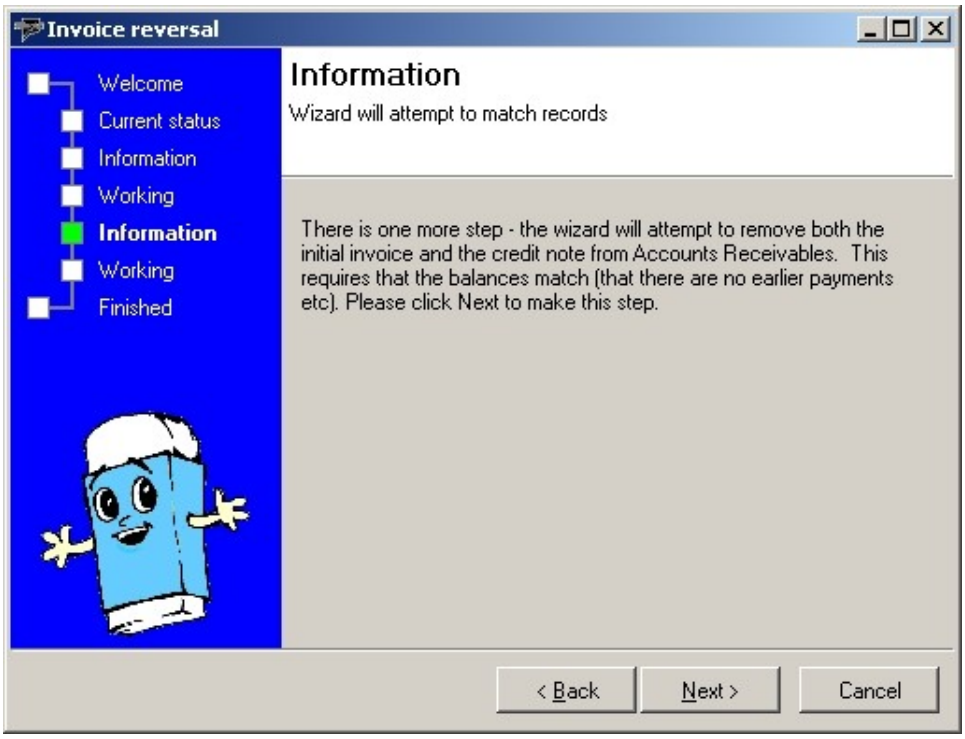
- **Working**

  The wizard will then create a credit note for the invoice. This is basically a negative of the invoice. It will also be given its own reference number. It will then lock the credit note and unlock the funeral to allow editing.



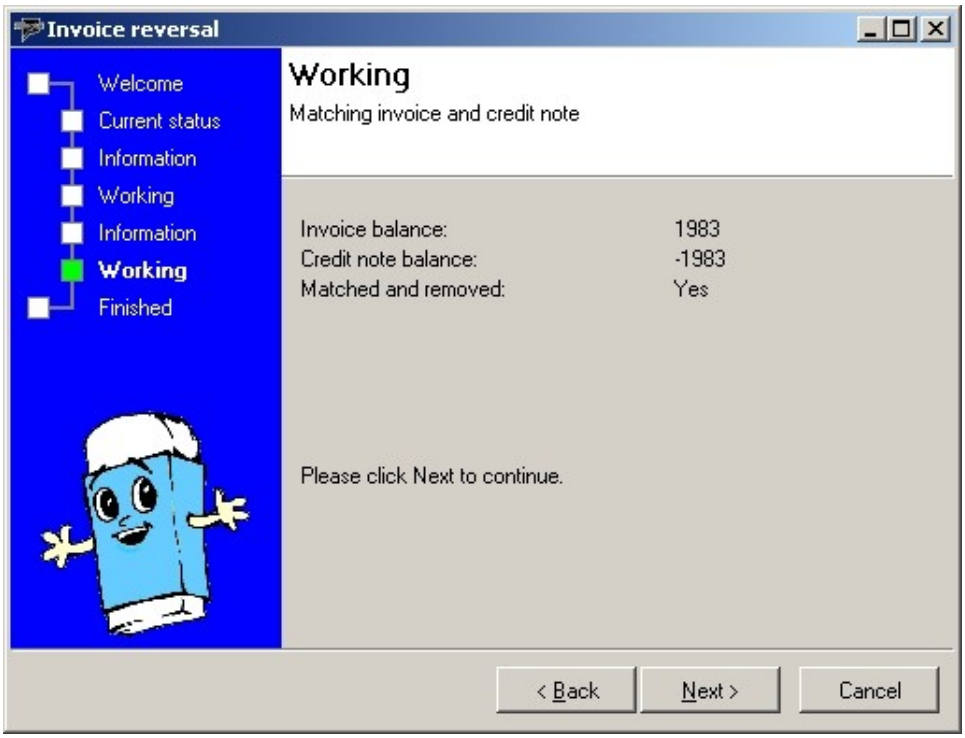
- **Information**

  The wizard will now attempt to remove both the initial invoice and credit note from **Accounts receivable**. This requires that the balances match and there were no earlier payments. If the balances do match they will be removed from **Accounts receivable**. If they don't and you have made a payment, the wizard will not remove them and you will need to make manual negative payments to ensure the **Accounts receivable** list is cleared. The original payment should then be made again once the amended invoice is raised.



- **Working**

  The wizard will now match the invoice balance and the credit note balance. If they do match, they will be removed form the **Accounts receivable** list. If they don't you will get a warning and they won't automatically be removed from the **Accounts receivable** list.



- **Finished**

  The wizard has now finished. You will now be given the option to view the credit note by clicking the **Open** button. Finally, click the **Finish** button to close the wizard.

The funeral record is now unlocked and changes can be made. Once you have made the necessary changes go to the **Status** tab, click the **Action** button and choose **Raise invoice**. You will then go through the normal steps to invoice the funeral. This will be a completely new invoice and will have its own unique invoice number. All invoice (and credit note) numbers will be shown on the **Client | Account** tab.

The screen shots below show a typical credit note (simply a minus quantity for all products) and a Client | Account tab showing the initial invoice being credited and the amended invoice. Note they all have unique invoice numbers.

Client invoices

General

Number: 10030

Date: 27/08/2010

Private address

Locked

Lock...

Address

From file... | Title: Mr | Client first names: Harold | Client surname: Black | Account...

124 Mount Street

Cheam

Surrey

County | Post code | Country

Sales | Costs/profits | Commission | Accounting | VAT summary | Organisation | Account | Information | Notes | Log

Products and prices

Ref	Description	Disb.	Price	Qty	Disc%	Text	Sales
Click here to add a new row							
SSP	Standard professional service charge	☐	700.00	-1			-700.00
VRE	Removal of the Deceased	☐	85.00	-1			-85.00
CIR	Irlam Coffin	☐	350.00	-1			-350.00
VH	Hearse	☐	200.00	-1			-200.00
DC	Church fee	☑	78.00	-1			-78.00
DCE	Cemetery fee	☑	340.00	-1			-340.00
DGP	Grave preparation	☑	50.00	-1			-50.00
HREH	Removal of Memorial - Headstone	☑	80.00	-1			-80.00
DMI	Minister and travelling fee	☑	100.00	-1			-100.00

Total discounts: 0.00 | Total sales: -1,983.00 | Balance: -1,983.00

OK | Cancel

Clients

Ref.number: 11326 | Person | Title: Mr | First names: Harold | Name: Black | Honours:

Address | Notes | Graphic | Organisation | Information | Account | Events | Log

Invoices and payments

Date	Text	Number	Description/Deceased	Invoice	Payment	Balance
27/08/2010	Invoice	10029	Reversed Funeral 10004	£1,983.00		£0.00
27/08/2010	Invoice	10030	Reversed Funeral 10004	-£1,983.00		£0.00
27/08/2010	Invoice	10031	Black, Brenda (Funeral a	£2,103.00		£2,103.00
				£2,103.00	£0.00	£2,103.00

Show: All history

OK | Cancel

I.4 Viewing raised invoices

There are 2 ways of viewing invoices which have already been raised. You can go directly to the invoice section where all invoices are stored or you can go to the funeral record section and view the invoice from a particular funeral record.

I.4.1.1 Viewing invoices from the Finance menu

From the **Main menu** select the **Finance** section and then **Client invoices**. You will then be presented with a list of both locked and not locked invoices. You can then select a particular invoice to view by double clicking or highlighting and clicking the **Open** button.

You can also sort the invoices in the usual manner by using the default **Number** field to enter an invoice number or by using the **Sort** button and whatever field you select from the **Sort** menu.

Using the **Lines** button you can also filter the invoices down by selecting one of the predefined filters. For example, you may filter the invoices to show only those which are '**Not locked**' or those '**Registered in the last 7 days**' etc. After filtering you can then also use the **Sort** function to sort on only those invoices you have filtered.

I.4.1.2 Viewing invoices from the funeral record

If you open up a funeral record and go to the **Status** tab you will be able to see if the funeral has been invoiced or not by looking at the **Locked** tick box. If the funeral has already been invoiced then there will be a tick in the box. The status of this tick box may also be shown on the list of funerals.

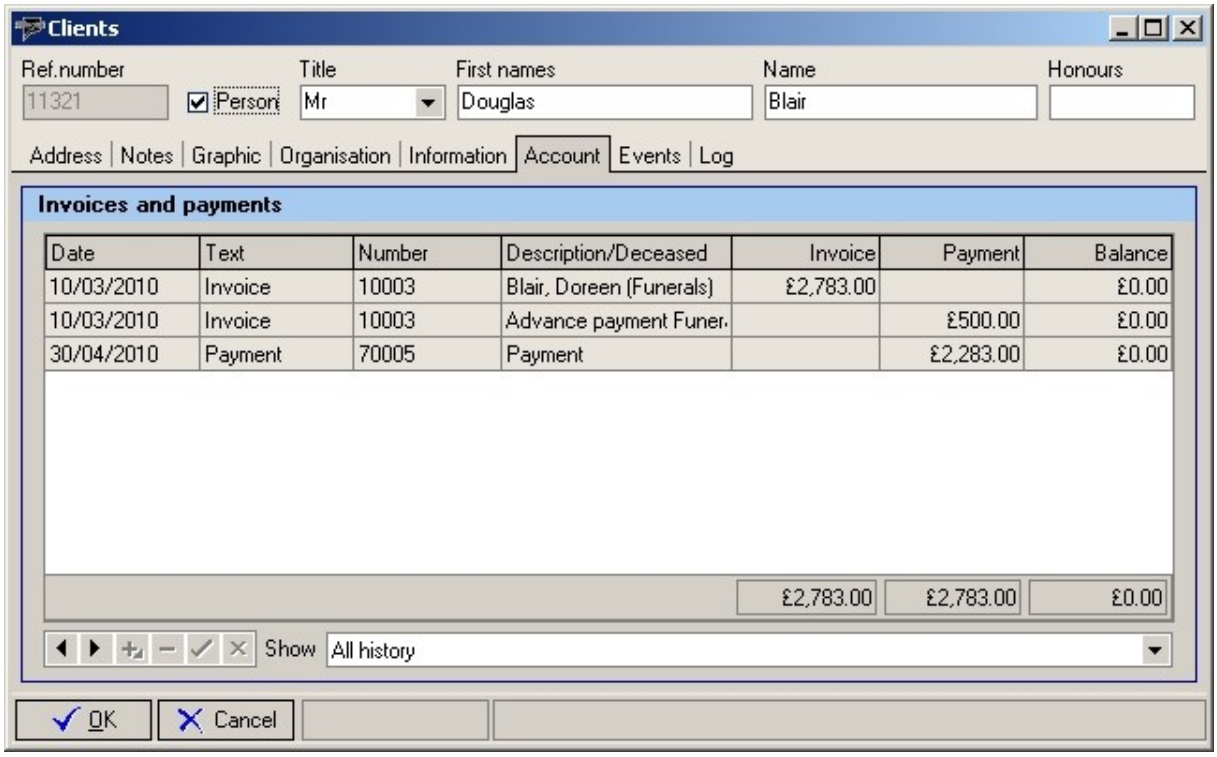
Click the **Action** button and if the funeral has been invoiced you can choose **Inspect invoice**. This option will close the funeral file and open up the invoice file.

I.5 Viewing Client Account details

As previously described, once a funeral has been invoiced, a Client record is generated from the client or 'Invoice to' details. This is kept in the **Clients** section of the **Contact files**. The reason for generating this file is so that account information can be kept and easily found for an individual client. This will then show what the client has been invoiced and also what payments they have made.

The Client contact records can be found from various places. They can be accessed by going directly to **Contact | Clients** and selecting the particular client. Once you have selected the client, click on the **Accounts** tab to view the invoice and payment history of this particular client.

*The screen shot below shows the **Client Account** tab for a particular client. This example shows the original invoice on 10 March 2010 with an advance payment also on that date. It also shows a further payment on 30 April 2010 with a total of what has been invoiced, what has been paid and the balance remaining.*



You can also access the **Client | Account** tab indirectly as follows:

- **Funeral record** — From the **Status** tab within a Funeral record there is a button labelled **Action**. Once a Funeral has been invoiced, the option **Inspect account** will be available when you click this. Choosing this option simply takes you to the **Contact | Client | Account tab** as if you had gone there from the **Contact** menu. This option will be greyed out until the funeral is invoiced and the **Client contact** record is generated.

- **Invoice record** — On the **Invoice record** there is a button labelled **Account** just to the right of the clients name. Clicking on it simply takes you to the **Contact | Client | Account tab** as if you had gone there from the **Contact** menu.

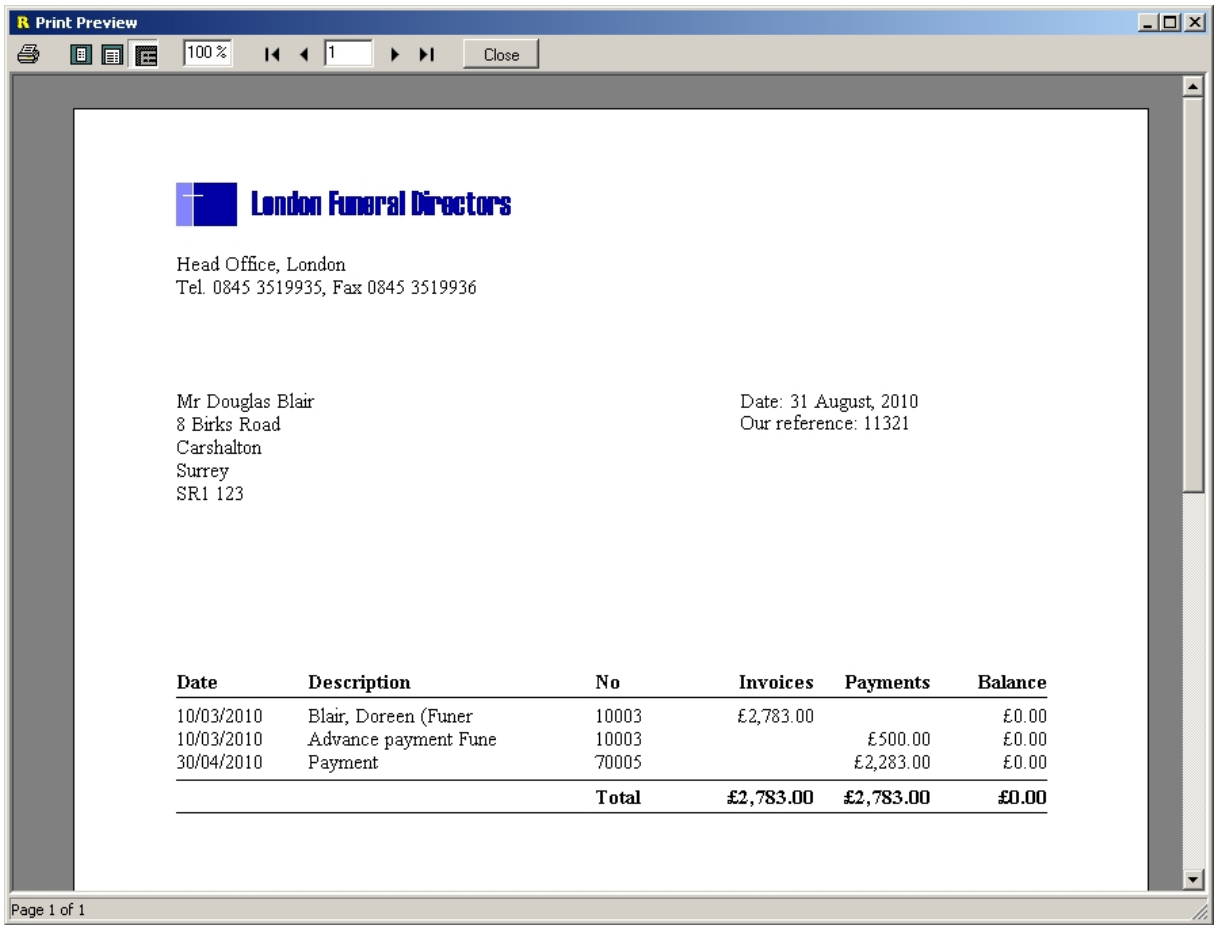
- **Accounts** — Open either an **Accounts receivable** or an **Accounts settled** record. In the **General** tab, inside the **Client** part of the window, there is a button marked **Open**. Clicking on this button will take you to the **Client contact** record where you can then click on the **Account** tab to view the information.

I.5.1.1 Printing Client Account details

A summary of the Client account details can be printed by simply opening the particular Client contact record and printing in the normal way.

For immediate printouts use the **Print** button which will send the document straight to the printer. For an on screen display of the document before printing use the **Print preview** button which will give you an on screen display before you decide to print. You can also use the **E-mail**, **Fax** or **Word** button options. On selecting any of these buttons you will be presented with the same options but will output the document in different ways.

*The screen shot below shows an example of the **Account summary** print out.*



J Accounts

J.1 Introduction

Accounts is split into two sections. There is **Accounts receivable** and **Accounts settled**. The Accounts receivable section shows a list of any invoices which are outstanding (assuming the invoices have been locked – raised invoices which have not been locked will not appear in the **Accounts receivable** list). The **Accounts settled** section shows all invoices which have been paid and settled.

These two sets of records are exactly the same, it is simply that the ones stored in **Accounts receivable** are not fully paid, whereas the records stored in **Accounts settled** have been fully paid.

J.2 Accounts receivable

As previously described, once an invoice has been raised and locked, it will then show in the **Accounts receivable** section until it is paid off. The Accounts receivable section will then allow you to find out how much money is owing to you and also give the options of generating reminder letters and keeping notes of what reminder letters / phone calls etc have been made.

J.2.1 Accessing Accounts receivable

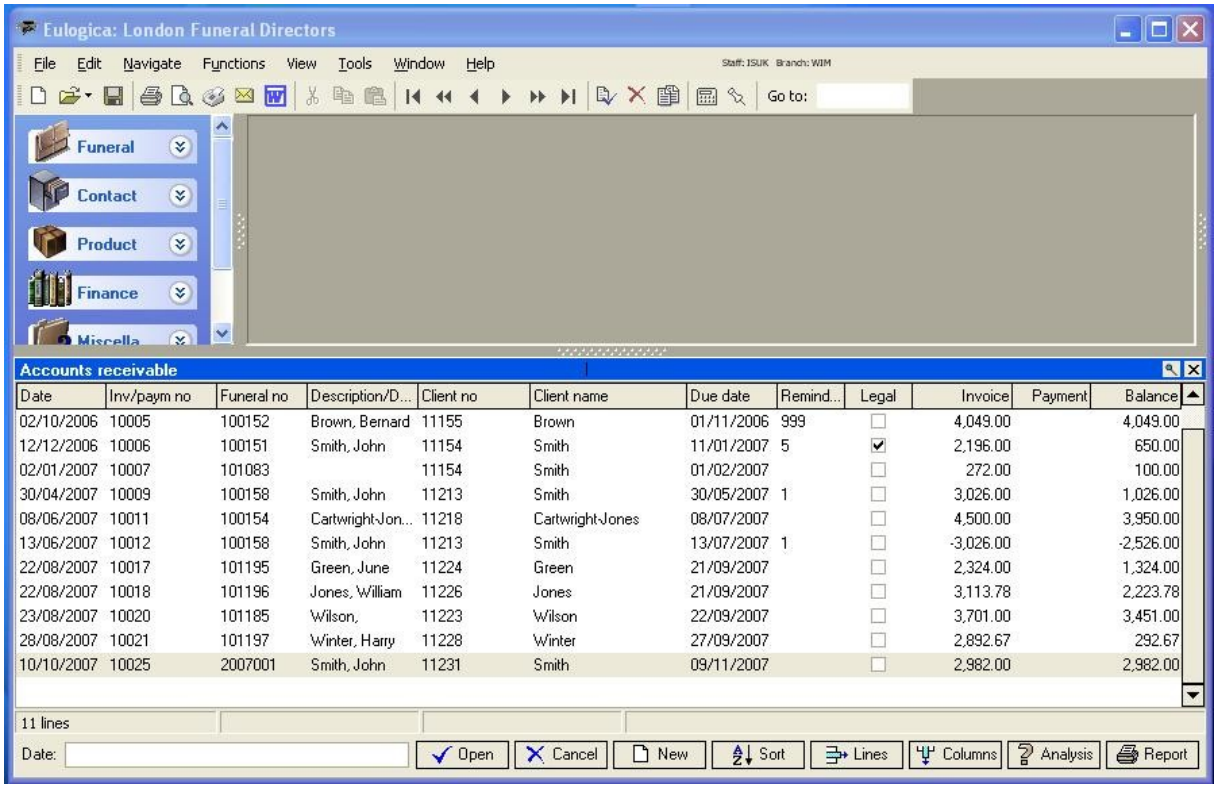
To view the Accounts receivable list select **Finance | Accounts receivable** in the main menu.

A window will appear towards the bottom of the screen with a list of the outstanding accounts. This window can be resized by clicking and dragging the dotted zone located in the middle of the top of the window. Clicking once on the dotted zone will shrink the window down to the bottom of the screen. To reopen the window simply click on the dotted zone again which is now located right at the very bottom of the screen.

The Accounts receivable list shows basic financial information. The first column shows the invoice date, followed by the invoice number and funeral reference number. There is then a short description of the record, for example, deceased's name etc. The Client no. and name are also shown. The Client number is automatically generated when a funeral is invoiced and the client is added to the Client contact list.

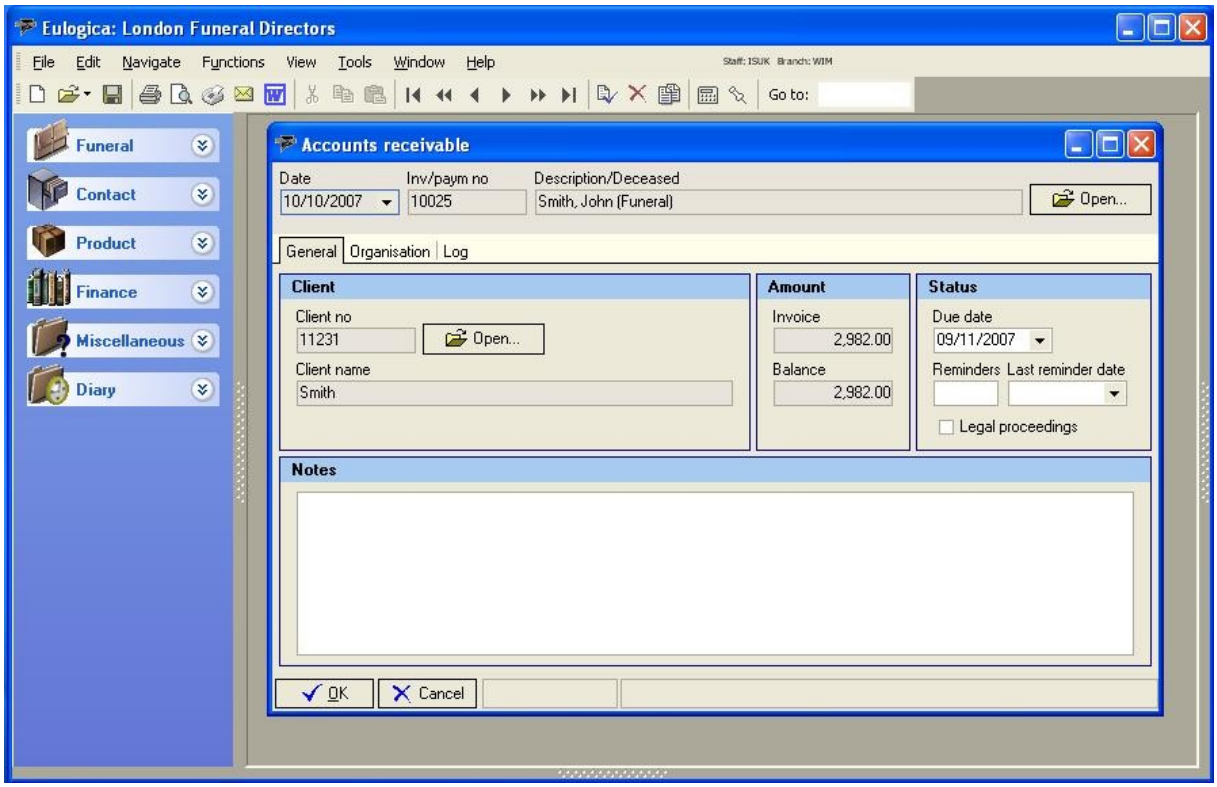
The **Due date** column shows the date on which the account should be paid by. This will be automatically calculated depending on your standard payment terms. The due date can be edited for each individual invoice (See **Raising the invoice - Due date** to edit this when generating the invoice and also below to amend once the invoice has been raised).

*The screen shot below shows the **Accounts receivable** list opened.*



To open a particular record simply highlight and double click, or highlight and click the **Open** button. You will then be presented with a new window where you can make notes about the actions you have taken to follow up this account.

*The screen shot below shows an **Accounts receivable** record opened.*



As can be seen, this window is laid out in various sections. These sections are described below:

The top line of the record has information about the date of the invoice, the invoice number, a description of what the invoice is for and also an **Open** button which will then open the invoice this record is linked with. These fields are not editable.

J.2.1.1 General tab

The **General** tab is split into 4 sections:

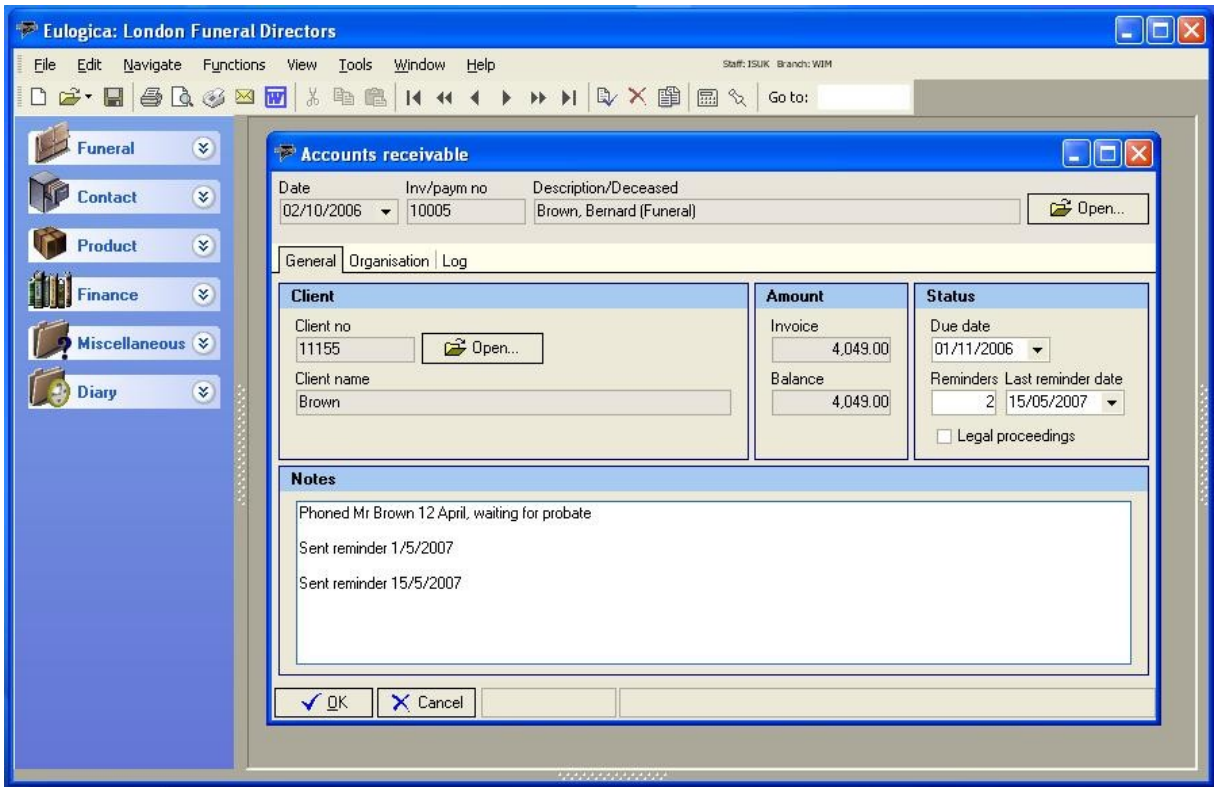
- **Client** This section shows the **Client number**, the **Client name** and has an **Open** button which will open up this particular client record. From here you can then look at the **Client Account** tab. These fields are not editable.
- **Amount** This section shows the original total **Invoice** amount and also the outstanding **Balance**. These fields are not editable.
- **Status** This section has 4 fields which are all editable.
    - The **Due date** field is automatically calculated depending on your standard payment terms. This, however, can be amended if so desired. Simply enter the due date.
    - The **Reminders** field is designed to enter the number of reminders sent. For example, if you had sent 2 reminders, then you would simply enter '2' in this field. This will then also show on the **Accounts receivable** list giving a quick overview when viewing the list.

- The **Last reminder date** simply allows you to use the date field to enter the date you sent the last reminder letter.

- The **Legal proceedings** check box, again, is designed to enable you to mark an account which has had to be passed to some form of debt collection agency. Simply click in the box to toggle the tick. This will also show on the **Accounts receivable** list therefore giving a quick overview when viewing the list.

- **Notes** The **Notes** section is simply an area where you can make notes about the actions taken when following this account up. This may include, for example, telephone calls made and received with regards to the particular account. Notes should also be made here of reminder letters sent etc.

The screen shot below shows an example of an Accounts receivable record with added notes etc.



J.2.1.2 Organisation tab

The **Organisation** tab shows the details of which **Branch**, **Area**, **Region** and **Brand** the particular record relates to. These fields are copied through from the original Funeral record and Invoice record. These fields are not editable.

J.2.2 Sorting Accounts receivable lists

The Accounts receivable list can be filtered and sorted in the usual way. The entries in the Accounts receivable list are sorted by invoice date as a default. Using the **Sort** button the list can be sorted by other options to aid in finding a particular record.

Using the **Lines** button, the list can be quickly filtered using the various predefined options. The main use of the **Lines** button, however, is the **Past due** filter (at the top of the list when the **Lines** button is used). This will basically filter the list to only show those accounts which are past the due date. This helps when deciding which clients need a reminder letter sending. Further information on sending reminders can be found later on in this section.

J.2.2.1 Printing Accounts receivable lists

By using the standard list feature on the **Accounts receivable** list, an overview of monies outstanding can be obtained.

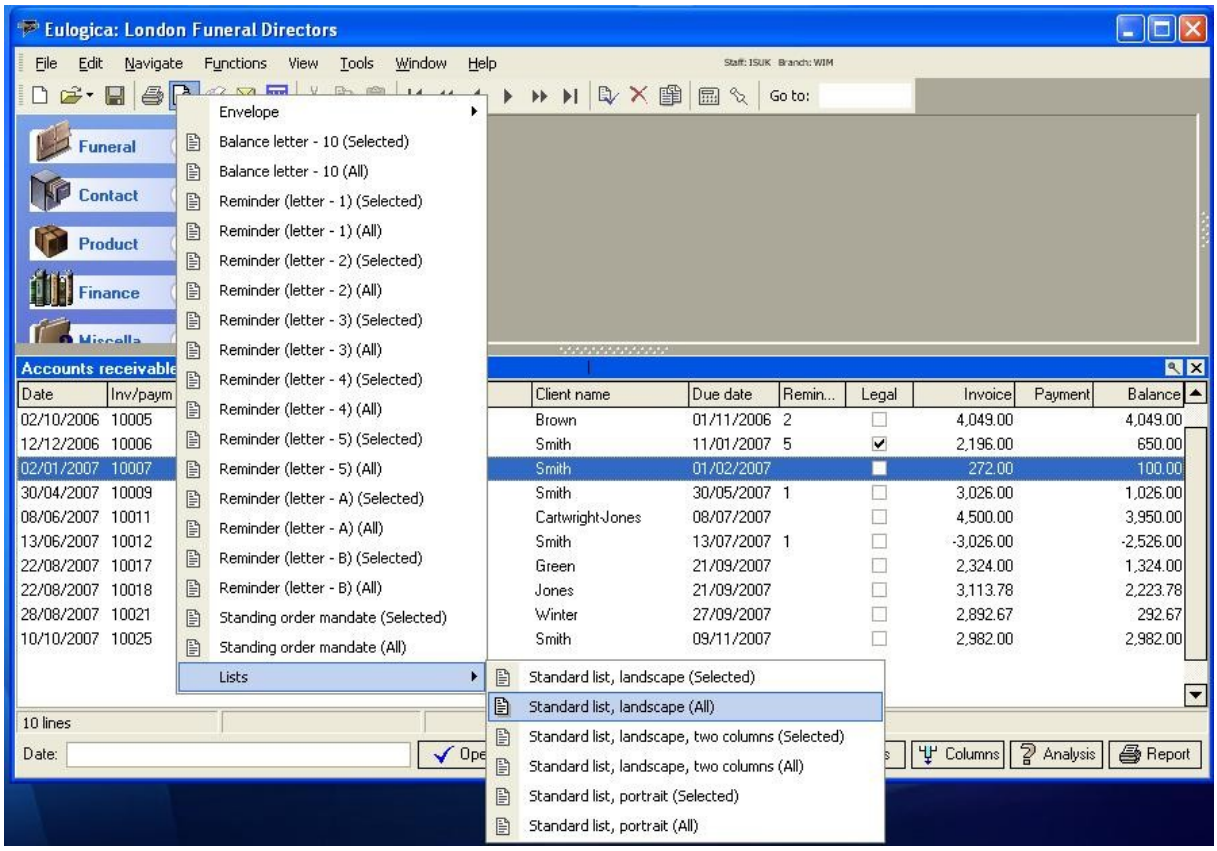
First of all decide what part of the list you would like to print. This will mainly be either the whole list or a filtered list showing all accounts past the due date. Next, using the standard **Print** buttons select **Lists** and then one of the options shown. There are various options and layouts available so simply decide which will be the best option for your requirements. The options are fairly self explanatory.

For each print layout / style there are a further 2 options. These are as follows:

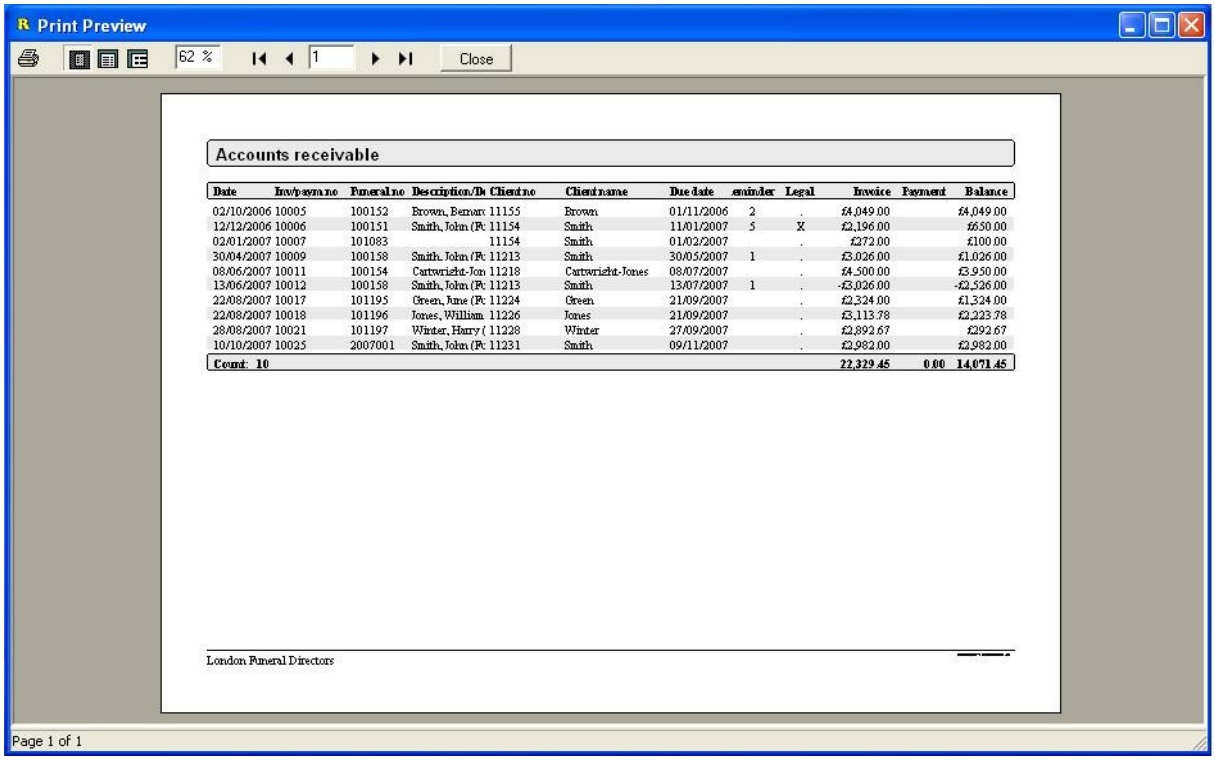
- **(All)** This will include all the entries in the list. For example, if your Accounts receivable list contains 15 entries, then each of these entries will be printed on the list and where applicable, totals of monies outstanding will be calculated from all these entries.

- **(Selected)** This will only include the highlighted entry on the list. For example, if your Accounts receivable list contains 15 entries, only the highlighted entry will be printed and where applicable, the total will simply be this one entry.

*The screen shot below shows the **Standard list, landscape (All)** document about to be previewed.*



*The screen shot below shows the actual print preview for the above selection. Note the **Reminder** and **Legal** columns and the **total** in the bottom right of the document.*



J.2.3 Reminders

The individual **Accounts receivable** records allow you to make notes and keep track of what actions have been taken when ensuring accounts are paid. For example, you can use the notes section to enter details of any telephone conversations you may have had with a client when following up an invoice.

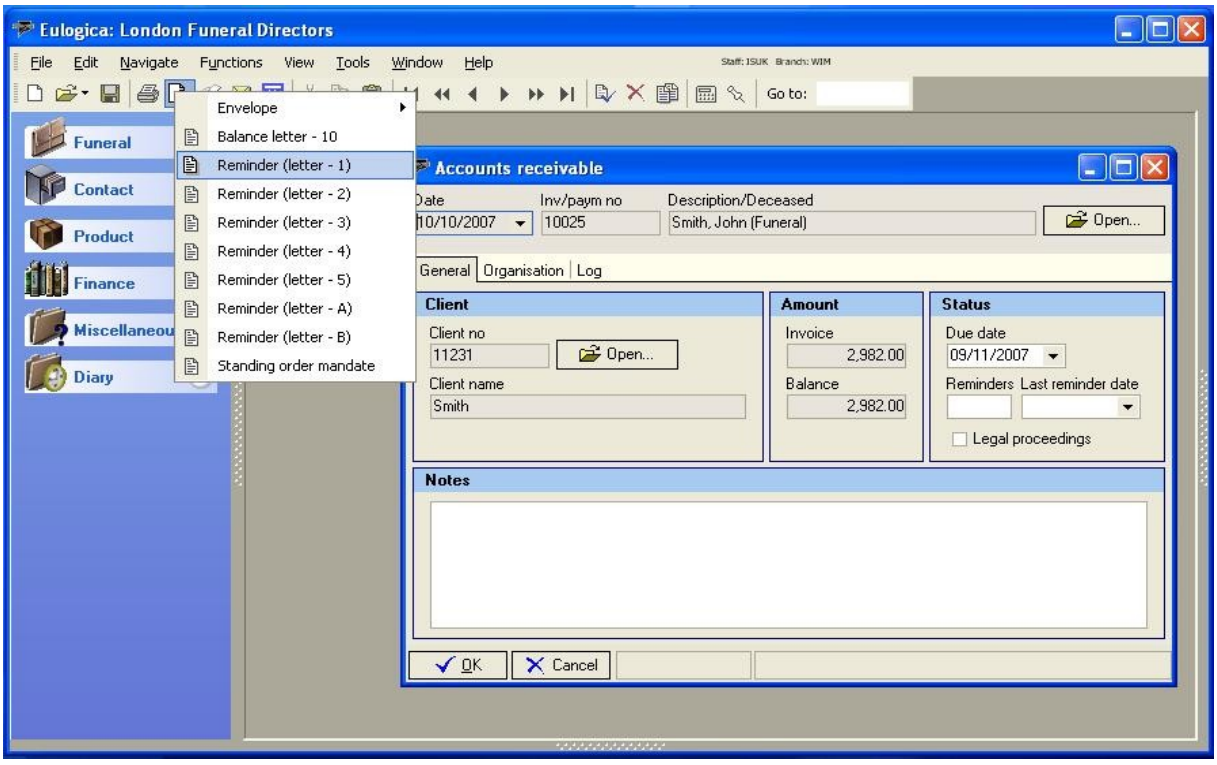
You can also use the notes section to keep track of when you last sent a reminder to a client, and which particular reminder letter you sent. There are also a few other fields within an **Accounts receivable** record to allow you to record how many reminder letters you have sent, the date you last sent a reminder letter and also a check box for marking if you have taken legal proceedings. Some of these fields can be shown in the **Accounts receivable** list to give you an instant overview of what actions have been taken on a list of accounts rather than have to open each individual record separately. Obviously, for further details on a particular client the individual record will have to be opened to view the manual notes section.

Open the **Accounts receivable** record by double clicking on the entry or highlighting and clicking the **Open** button. From here you can then make notes about which reminder letter you have sent or perhaps a telephone call you made.

J.2.3.1 Printing reminder documents

To print off reminder letters simply use the **Print** buttons in the normal way. You will be presented with a list of documents which are available for printing. These reminder documents will be related to the particular record which you currently have open. Please remember to manually make a note of which letters you have sent in the **Notes** section. Eulogica will not automatically record which documents you have printed.

*The screen shot below shows **Reminder (letter 1)** about to be previewed.*



J.3 Accounts settled

Once an account has been fully paid, the account record simply gets moved out of the **Accounts receivable** section and put in the **Accounts settled** section. This ensures that the **Accounts receivable** section only ever shows accounts which are outstanding.

The **Accounts settled** section is not something which will be used in the everyday use of Eulogica. It is better to use the **Contact | Client | Account** tab to check on an individual account status. The Accounts settled section does, however, preserve any notes made when the account was outstanding. For example, any of the fields in the **Status** or **Notes** parts of the window which were populated when the account was unpaid will be kept exactly as they were. The record will simply now be accessible via the **Accounts settled** section. Further notes can still be added if so desired.

There may be more than one entry in the Accounts settled list for a particular invoice. If an advance payment was made and entered in the funeral record, this will have its own entry in the Accounts settled list and the payment will be shown in the **Payment** column.

There may also be entries with the description **Reversed** in the **Description** column and a negative entry in the **Invoice** column. This is where the **Reversal** feature in the Funeral record has been used to credit the whole invoice and unlock the funeral record for editing and then re invoicing.

J.3.1 Accessing Accounts settled

To view the Accounts settled list select **Finance | Accounts settled** in the main menu.

A window will appear towards the bottom of the screen with a list of the paid accounts. This window can be resized by clicking and dragging the dotted zone located in the middle of the top of the window. Clicking once on the dotted zone will shrink the window down to the bottom of the screen. To reopen the window simply click on the dotted zone again which is now located right at the very bottom of the screen.

K Payments

K.1 Introduction

When a payment for a funeral account is made, this should be entered into Eulogica in order to accurately keep track of what accounts are outstanding in the **Accounts receivable** section. Payments for individual accounts can be made fully in one payment or any number of smaller payments can also be made at any time.

Whilst ever there is money outstanding on an Account, this account will remain in the **Accounts receivable** list. There may be times, for example, when the bulk of the account is paid and just a few pence is left outstanding. You may decide that you wish to write off these few pence without taking payment from the client. If, however, you simply enter the payment for the exact money received, this will leave an amount outstanding and this will then remain in the **Accounts receivable** list for ever more. Eulogica has the option to write off an amount entered by you without marking it as money received. This will then clear the account and it will be moved from the **Accounts receivable** list to the **Accounts settled** list. A record of the amount written off will be kept with this particular client payment.

K.2 Accessing Client payments

To view the Client payments list select **Finance | Client payments** in the main menu.

A window will appear towards the bottom of the screen with a list of all Client payments made. This window can be resized by clicking and dragging the dotted zone located in the middle of the top of the window. Clicking once on the dotted zone will shrink the window down to the bottom of the screen. To reopen the window simply click on the dotted zone again which is now located right at the very bottom of the screen.

The Client payments list shows basic financial details about payments made. The columns show the payment reference number, the date the payment was made, how the payment was made, whether the payment has been locked, the total amount and a description.

You should not worry too much about this list as it is simply a place where all payments are stored. Again, you should use the **Contact | Client | Account** tab for checking an individual account status.

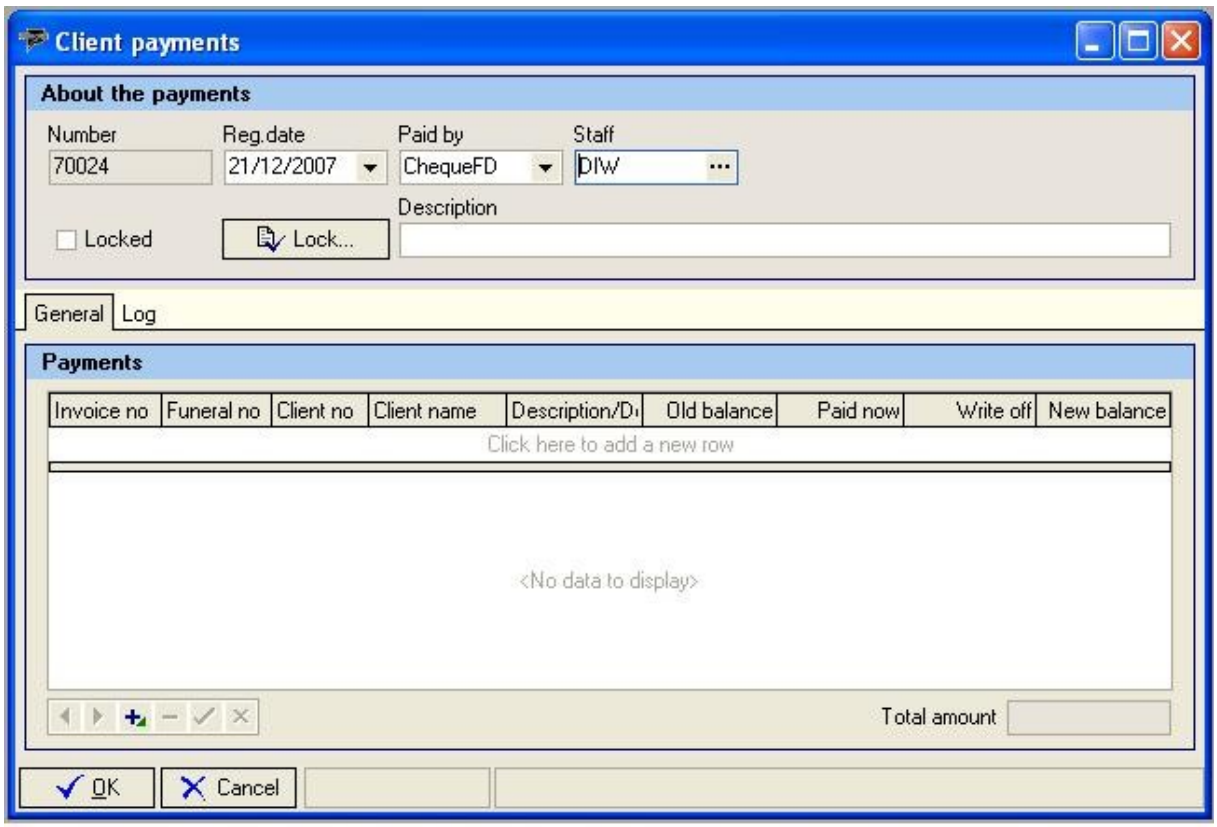
K.3 Making payments

Please note that payment records can contain any number of payments and these payments can be to different funeral accounts. It is up to you how you wish to enter payments to suit your way of working. For example, you can simply enter one payment per record if you so wish. You could also enter any number of payments to one payment record for perhaps a particular day. Another option may be to enter all cash received in a day onto one payment record and all cheques received onto another payment record.

Which ever way you decide to enter payment they will all be allocated to their correct invoices and the payments will also be shown on the **Contact | Client | Account** tab.

Select **Finance | Client payments**. This will open up the Client payments list as described earlier. Now click the **New** button at the bottom of the screen. This will open up a new client payment record ready for entering the payment details.

*The screen shot below shows a new **Client payment** record.*



The top part of the window includes details **About the payments**. These include the following fields:

- **Number** — This is automatically generated and cannot be amended. It is simply a reference number for the client payment record.
- **Reg. date** — This is the date the payment is being entered onto Eulogica. Today's date will automatically be entered, but this can be amended.

- **Paid by** This field can be used to enter how the payment was made. You do not have to enter any details into this field if you do not wish to.
- **Staff** This field allows you to record which member of staff entered the payment. By default this will be the person currently logged onto Eulogica.
- **Locked check box** This shows whether the payment has been locked. Once a payment has been locked no further changes can be made.
- **Locked button** This is used to lock the payment record once you have entered all the details, including the actual payments. Please note that once you lock a payment changes cannot be made to this particular record. If a mistake is made, a negative payment will have to be made to correct the mistake. This ensures a complete history is kept of all payment entries.
- **Description** This can be used to enter some description about the payment. This may be something to do with the funeral if you are making one payment entry or it could perhaps be the name of a branch thereby denoting that this batch of payments was for that particular branch.

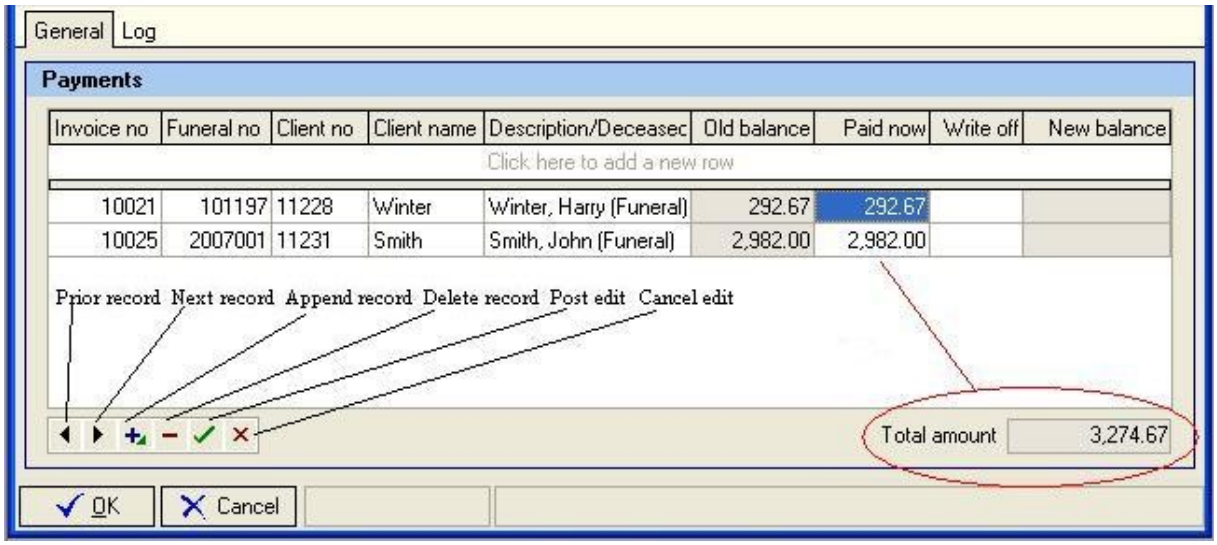
The bottom part of the window includes details about the actual **Payments.** Here multiple payment entries can be entered line by line if so desired. The field headings are fairly self explanatory.

- **Invoice no** The invoice reference number.
- **Funeral no** The funeral reference number.
- **Client no** The client reference number. You will remember that this client contact record is automatically generated when the funeral is invoiced.
- **Client name** The name of the client.
- **Description** A description of what the invoice is for.
- **Old balance** The amount actually outstanding on the account. This field is not editable.
- **Paid now** The amount being paid now. By default, the full outstanding amount is automatically filled in here. This can be amended by simply entering the amount actually being paid.
- **Write off** This field is used when you wish to write off part of the invoice as described in the introduction to this section. It will be recorded as being written off but it will deduct the amount from the balance remaining. This will then allow you, for example, to write off an amount for whatever reason and so not have the account sitting in the **Accounts receivable** list for ever more.
- **New balance** This field will show the new balance taking into account the **Paid now** and **Write off** fields. If there is nothing left to pay then this field will remain blank. If a client has overpaid then a negative amount will appear in the field. The account will also remain in the **Accounts receivable** file with a negative balance. A negative payment will be needed to clear this account.

The buttons in the bottom left hand side of the window are for moving up and down the payment entry lines, adding another payment, deleting a payment, confirming a payment edit or cancelling a payment edit.

The **Total amount** field in the bottom right hand side of the window is the total of all the **Paid now** entries.

*The screen shot below shows the payment edit buttons and the **Total amount** field*



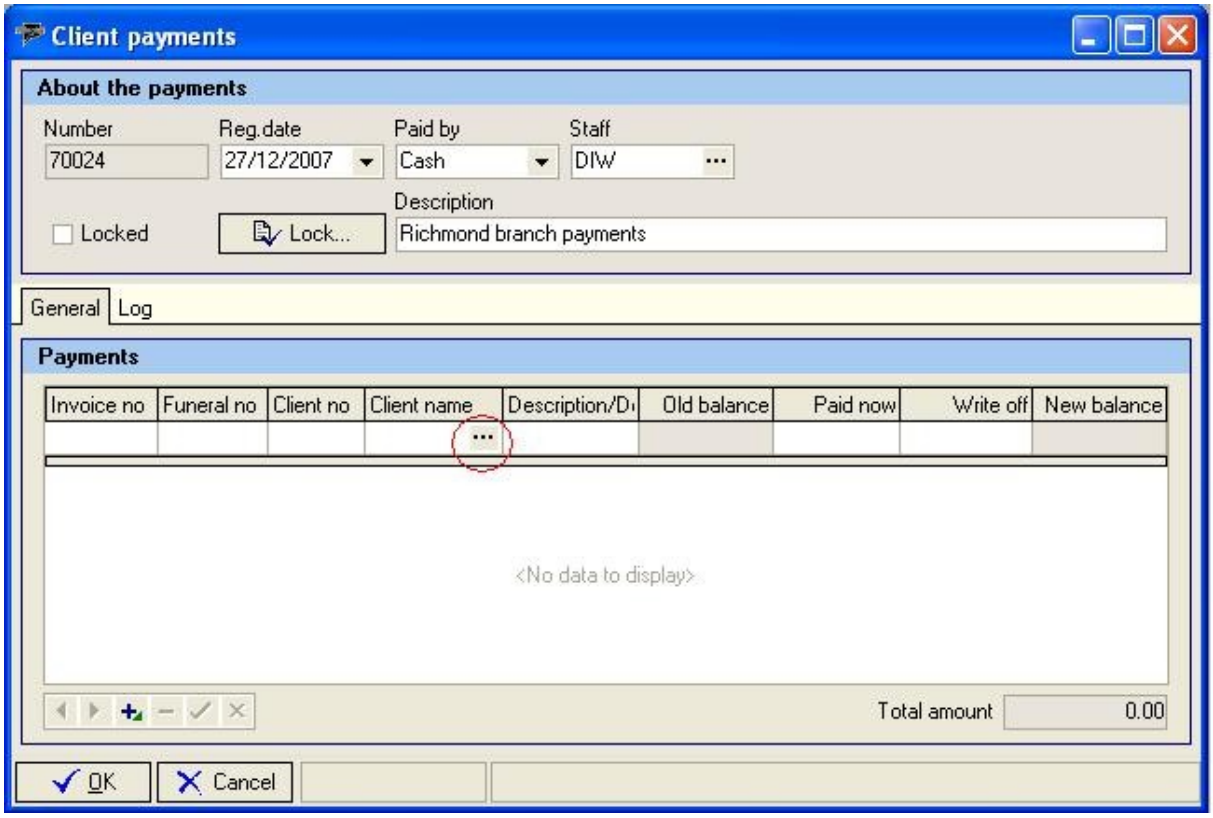
Fill in the top part of the window with the required information.

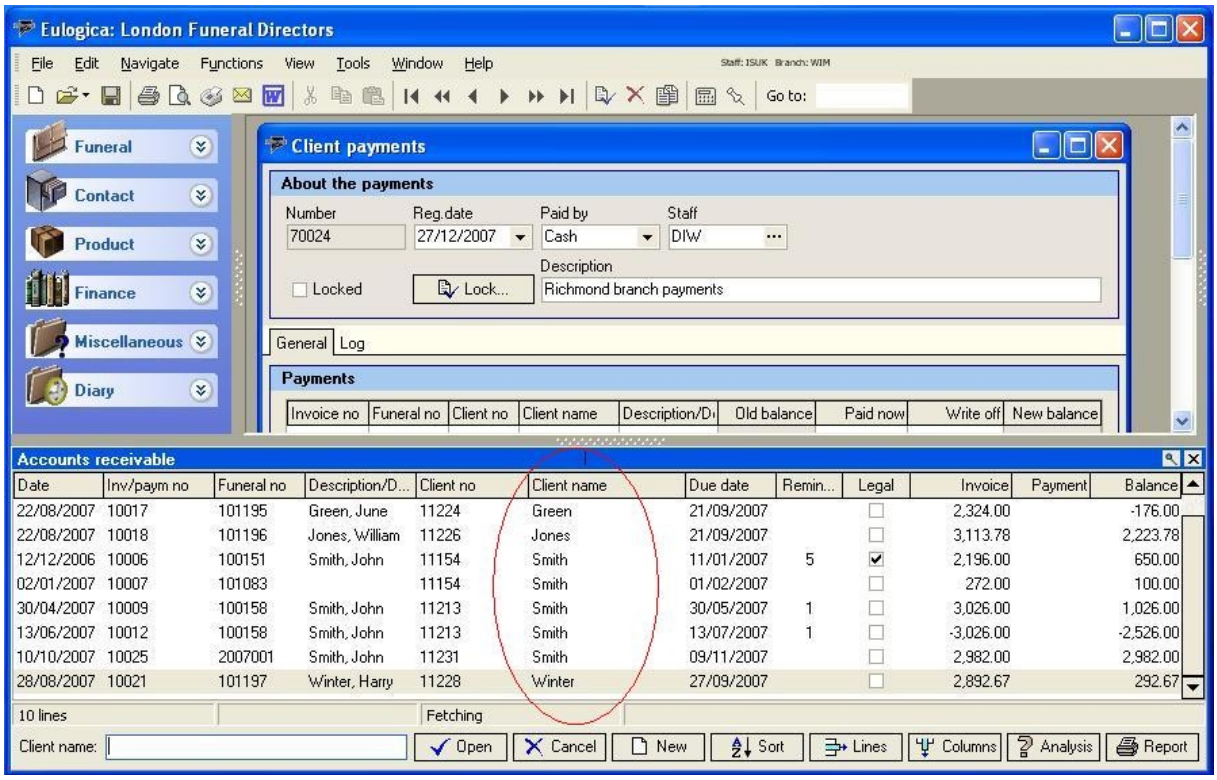
To fill in the **Payments** part of the window you need to click in the line underneath the column headings where it says in grey **'Click here to add a new row'.** You can click directly under either **Invoice no, Funeral no, Client no, Client name** or **Description**. A button containing 3 dots will then appear under the heading you have selected. Clicking on this button with the 3 dots will then open up the **Accounts receivable** list.

If you clicked under the Client name heading and opened the 3 dots button from there, the **Accounts receivable** list will be opened in Client name order.

The same **Accounts receivable** list will open if you clicked under any of the other headings but the list would then open up in the order of the heading you clicked under.

*The screen shots below show the **Client name** heading being used to open up the **Accounts receivable** list and then the actual Accounts receivable list sorted in Client name order.*





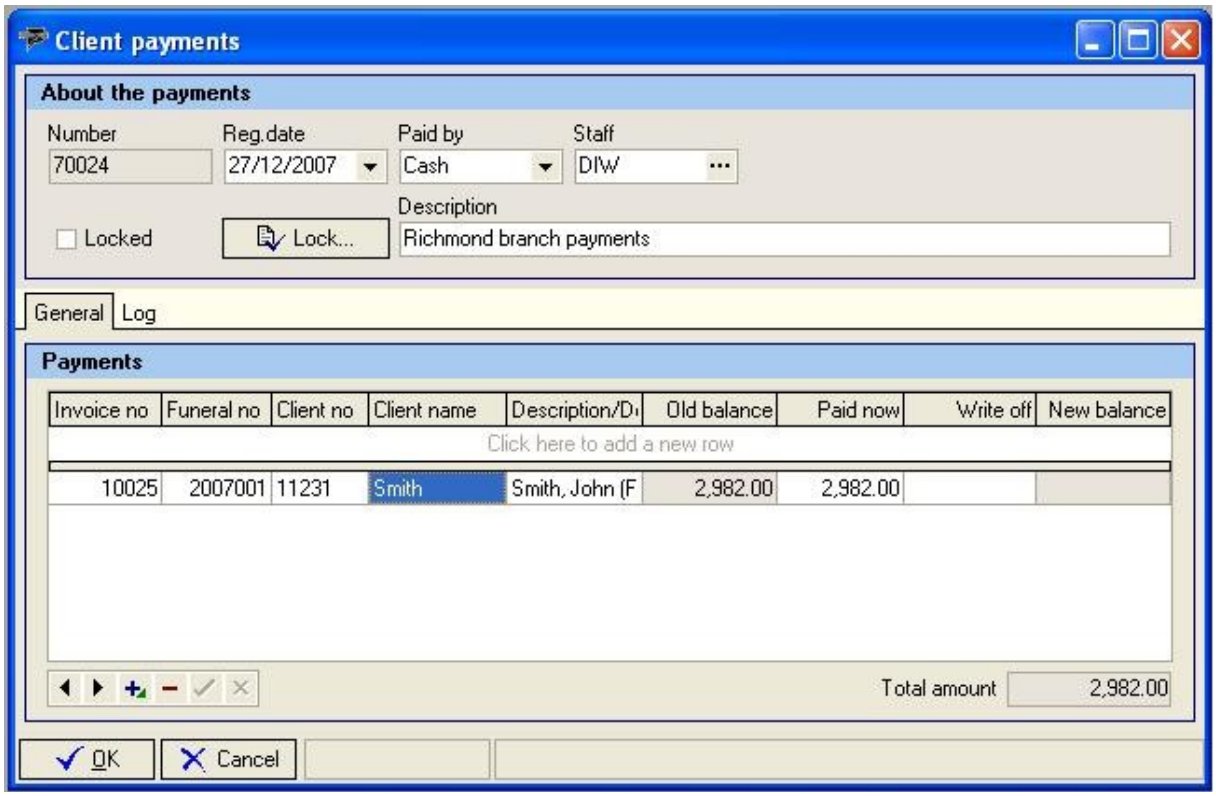
Next, select the particular account which you are entering the payment for. To do this simply **double click** on the appropriate entry or highlight the entry and click the **Open** button. This will then populate the payment line with all the details from the **Accounts receivable** list. The **Old balance** will automatically be entered and the **Paid now** field will be automatically populated with the full amount owing. If the client is not paying the full amount then the **Paid now** field should be edited by simply typing in the actual amount they are paying.

Next you need to confirm the payment entry is either OK, by clicking the **green tick (Post edit)** button or not OK by clicking the **red x (Cancel edit)** button.

If you click the **green tick** then the **New balance** field will be calculated (assuming the full amount is not being paid) and the **Total amount** field will be calculated.

If you click **the red x** the line will be deleted.

*The screen shot below shows a payment which has been entered and confirmed with the **green tick**. You will see the **New balance** field is nothing and the **Total paid** field has been calculated.*

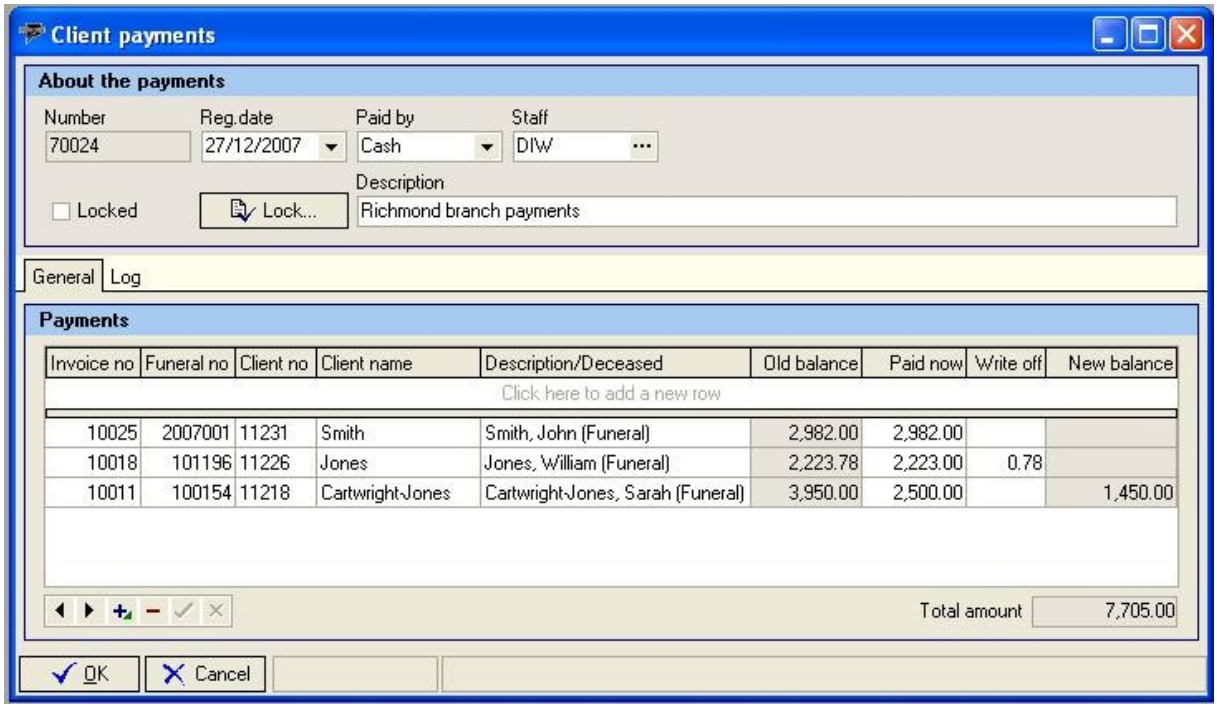


Payments can still be added, deleted or edited until the whole Payment record is locked.

To add another payment line, simply click again where it says '**Click here to add a new row**' and follow the same procedure for this payment. When you click the **green tick** to confirm this payment, the **Total amount** field will then be recalculated.

To delete a particular payment within the payment record, simply click once somewhere in the actual payment line and then click the **red minus (Delete record)** button. You will be asked to confirm you wish to delete this record.

The screen shot below shows a payment record with 3 payment entries.



- The first entry is paying the full amount so the **New balance** is blank.
- The second entry is paying almost the full amount with the pence part written off and again, the **New balance** is therefore blank.
- The third entry is a part payment leaving a **New balance** to pay.
- The **Total amount** has been calculated as the total of the **Paid now** fields and hasn't taken into account the **Write off** amount.

K.3.1 Locking payments

Once you are happy with the payment entries, the whole payment record should be locked. This has 2 purposes.

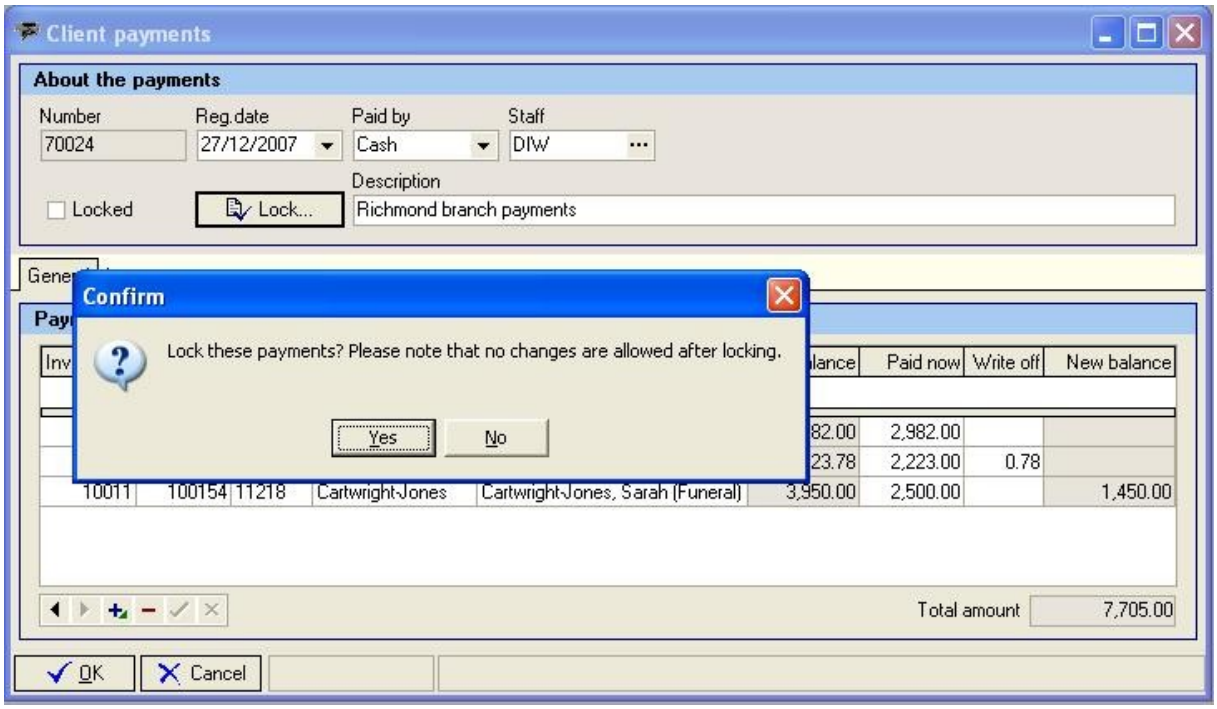
- Firstly, it stops the entries being edited or deleted.
- Secondly, the **Accounts receivable** and **Accounts settled** lists are updated. These lists will **NOT** be updated until the payment record is locked.

To lock the payment record simply click on the **Lock** button. You will then be given a warning that no further changes will be possible after locking. To continue select **Yes** and to cancel select **No**.

Please note that the payment record can be 'OK'd' without locking the actual payment record. If you do click the **OK** button without first locking the record it will simply be saved in the **Client payments** list as not locked. You can then open it at a later time and add, delete or edit payments. You may wish to

do this if you are entering payments on a daily basis and wish to wait until the end of the day to see if any further payments come in before actually locking the record. Please be aware, as mentioned earlier, that the **Accounts receivable** and **Accounts settled** will not be updated until the payment record is locked.

*The screen shot below shows a payment record where the **Lock** button has been clicked. This is the warning to confirm you wish to lock the record.*

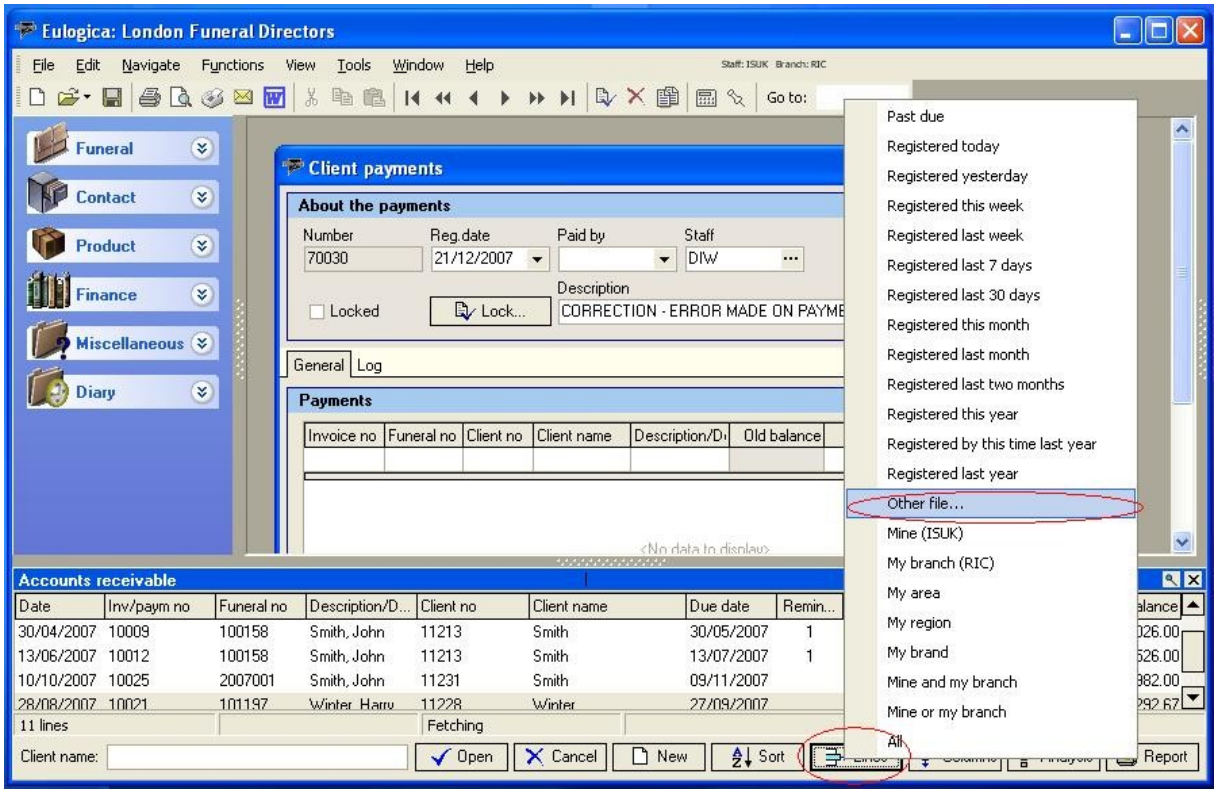


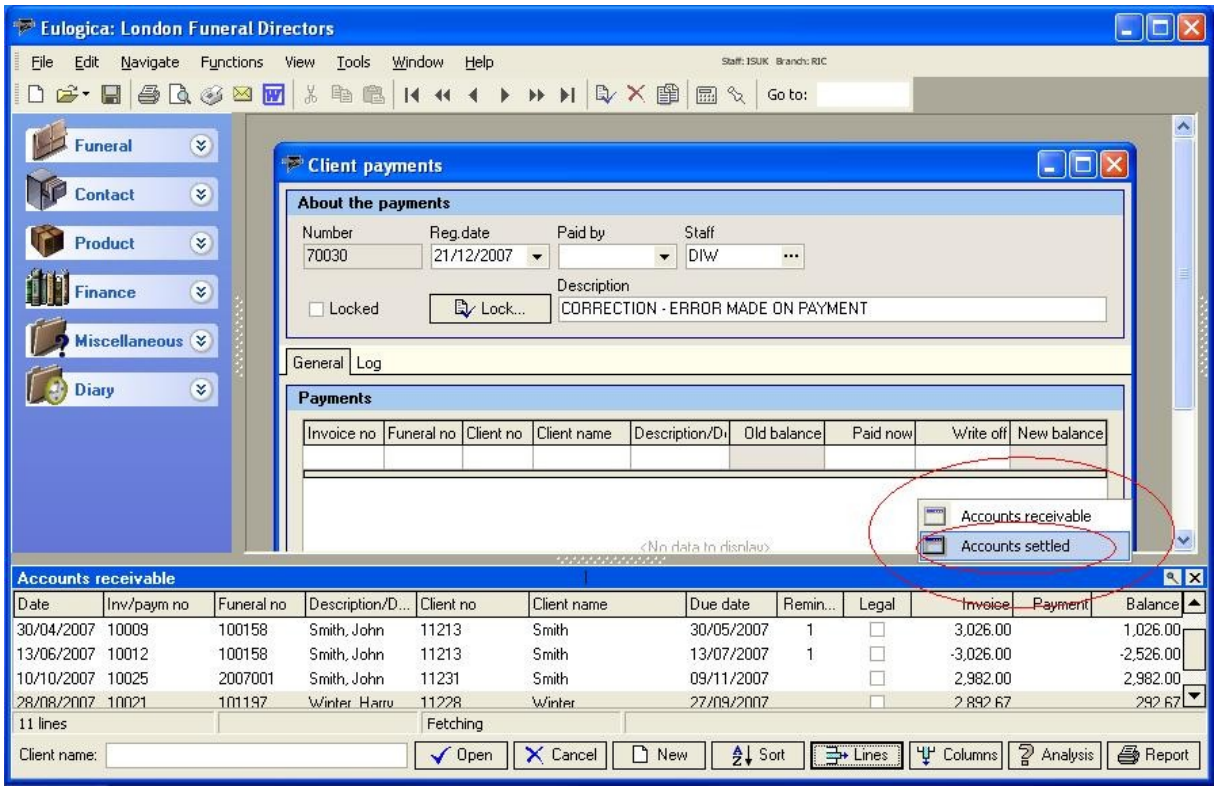
Should you attempt to edit a payment record after it has been locked, you will be presented with the following warning.

K.3.2 Correcting payment errors after locking

Should you make an error when entering payment details and then lock the payment record, you will not be able to edit the details on this payment.

To correct the error you will have to create a negative payment to cancel the payment details made in error. To do this simply create a new payment record and reselect the same invoice into the payment. If you paid the account fully in error and the invoice in no longer available in the **Accounts receivable** list, you will have to use the **Lines** button and then select **Other file**. You will then be presented with the option to select the **Accounts settled** file where you will then find the invoice.





Select the invoice payment to be corrected and enter the negative amount of the previous payment (the one made in error). This will now cancel out the previous payment. Please note that it is advisable to make some note in the **Description** field that you are correcting a mistake for future reference.

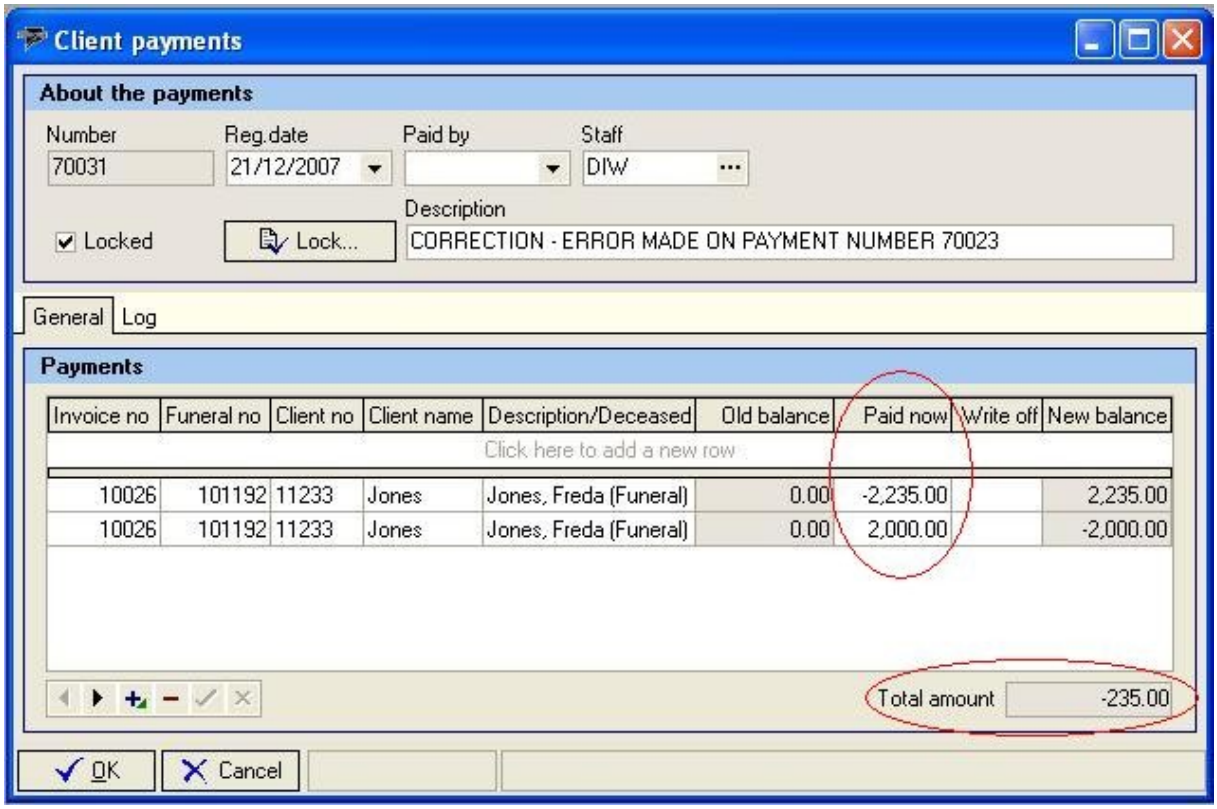
You now have 2 options:

- You can lock the payment which will then update the **Accounts receivable** and **settled** lists and basically move the account back into the **Accounts receivable** list (assuming you paid the invoice in full). You can then make a new payment, select the invoice in the usual manner from the **Accounts receivable** list and then enter the correct payment in the **Paid now** field. The **New balance** field should then show the correct amount outstanding. **Lock** this payment record and you should now have corrected the mistake.

  or

- You can create a second payment entry in the same payment record for the correct amount. As the payment record has not yet been locked the **Accounts receivable** and **settled** will not have been updated and the invoice may still be in the **Accounts settled** list. You will therefore need to use the **Lines** button again, select **Other file** and then select **Accounts settled** to find the invoice in question. Then simply enter the correct payment in the **Paid now** field. Please note that the **New balance** fields will not show correctly yet as the payment record has not yet been locked and so the **Accounts receivable** and **settled** lists have not been updated with either payment. **Lock** the whole payment record and the **Accounts** lists will then be updated with both payments and you should now have corrected the mistake.

The screen shot below shows a negative payment entry to cancel out the previously incorrectly entered payment and then a second entry in the same payment record for the correct amount. This particular example assumes and incorrect initial payment of £2235 which should actually have been £2000. Note that the ***Total amount*** *for this payment record shows -£235.*

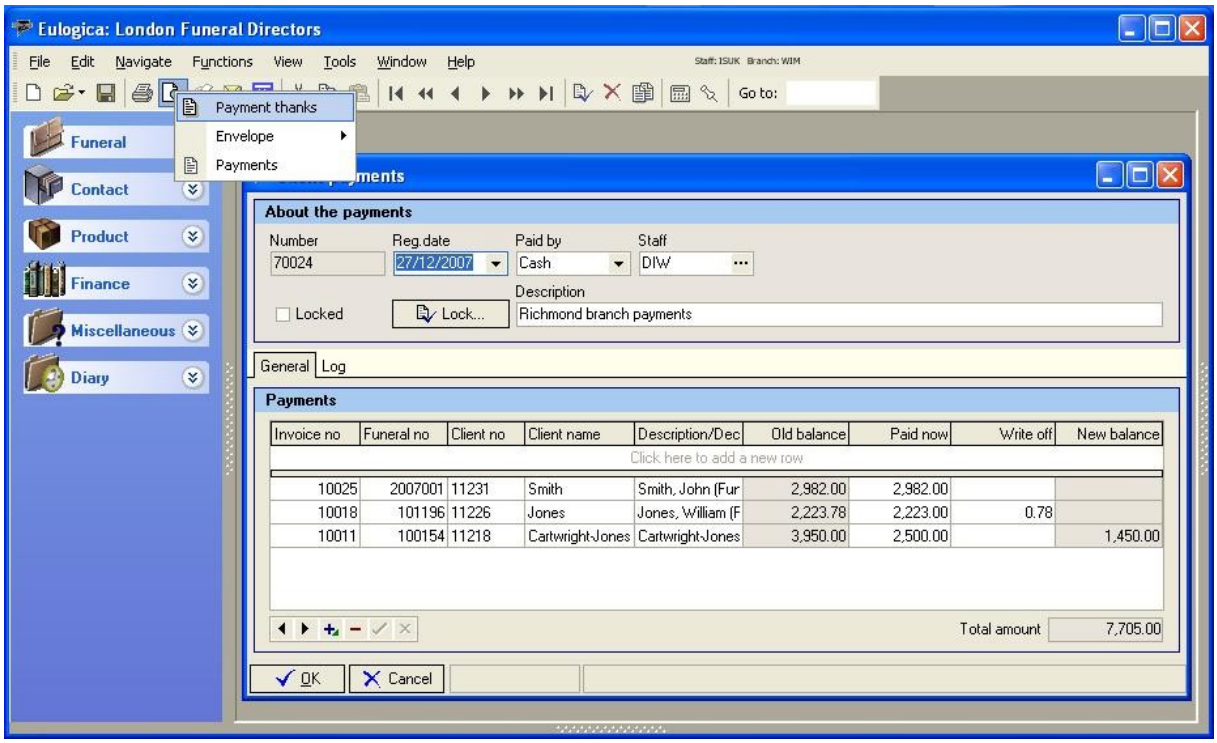


K.3.3 Printing from payment records

Documents can be printed from client payment records. These include a receipt to the client and an internal overview of the payments made within a record.

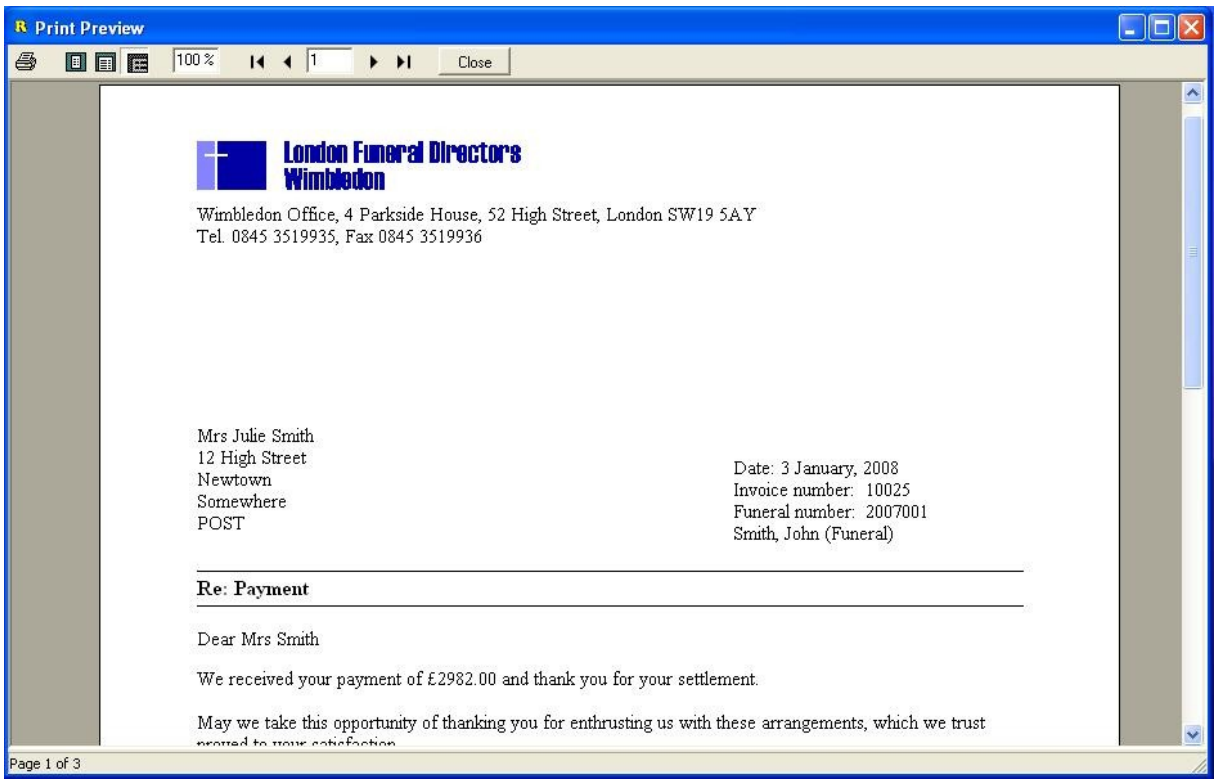
Printing is carried out in the usual way using the various **Print** buttons.

*The screen shot below shows a **Print preview** of the **Payment thanks** document being selected.*



If you have made a number of payments within a payment record (as shown above), each payment will generate a client receipt. Simply select the **Payment thanks** document and you will be presented with a receipt for each client.

The screen shots below show the various receipts generated for the payment record above. Note how the second receipt shows a full settlement but does not mention the write off amount and the third receipt shows a partial settlement with the outstanding amount also shown.



Print Preview

London Funeral Directors
Wimbledon

Wimbledon Office, 4 Parkside House, 52 High Street, London SW19 5AY
Tel. 0845 3519935, Fax 0845 3519936

Mrs Julie Smith
12 High Street
Newtown
Somewhere
POST

Date: 3 January, 2008
Invoice number: 10025
Funeral number: 2007001
Smith, John (Funeral)

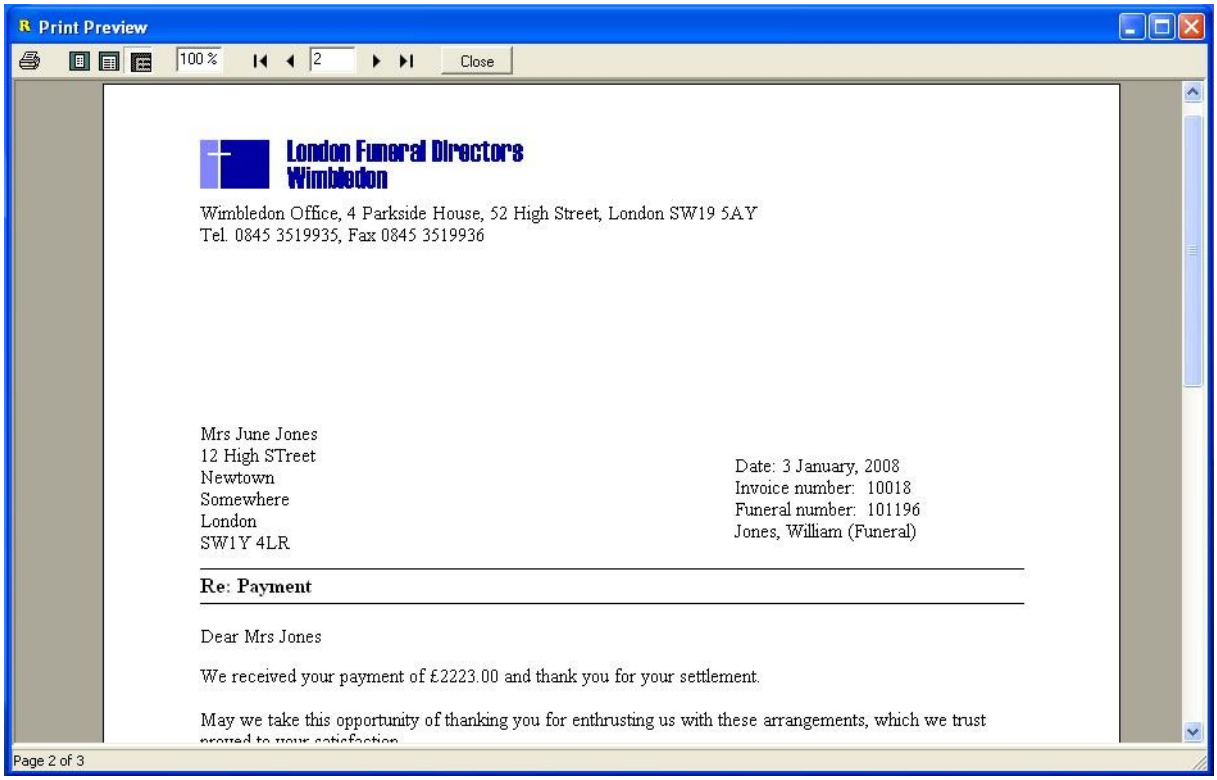
Re: Payment

Dear Mrs Smith

We received your payment of £2982.00 and thank you for your settlement.

May we take this opportunity of thanking you for enthrusting us with these arrangements, which we trust

Page 1 of 3



Print Preview

London Funeral Directors
Wimbledon

Wimbledon Office, 4 Parkside House, 52 High Street, London SW19 5AY
Tel. 0845 3519935, Fax 0845 3519936

Mrs June Jones
12 High STreet
Newtown
Somewhere
London
SW1Y 4LR

Date: 3 January, 2008
Invoice number: 10018
Funeral number: 101196
Jones, William (Funeral)

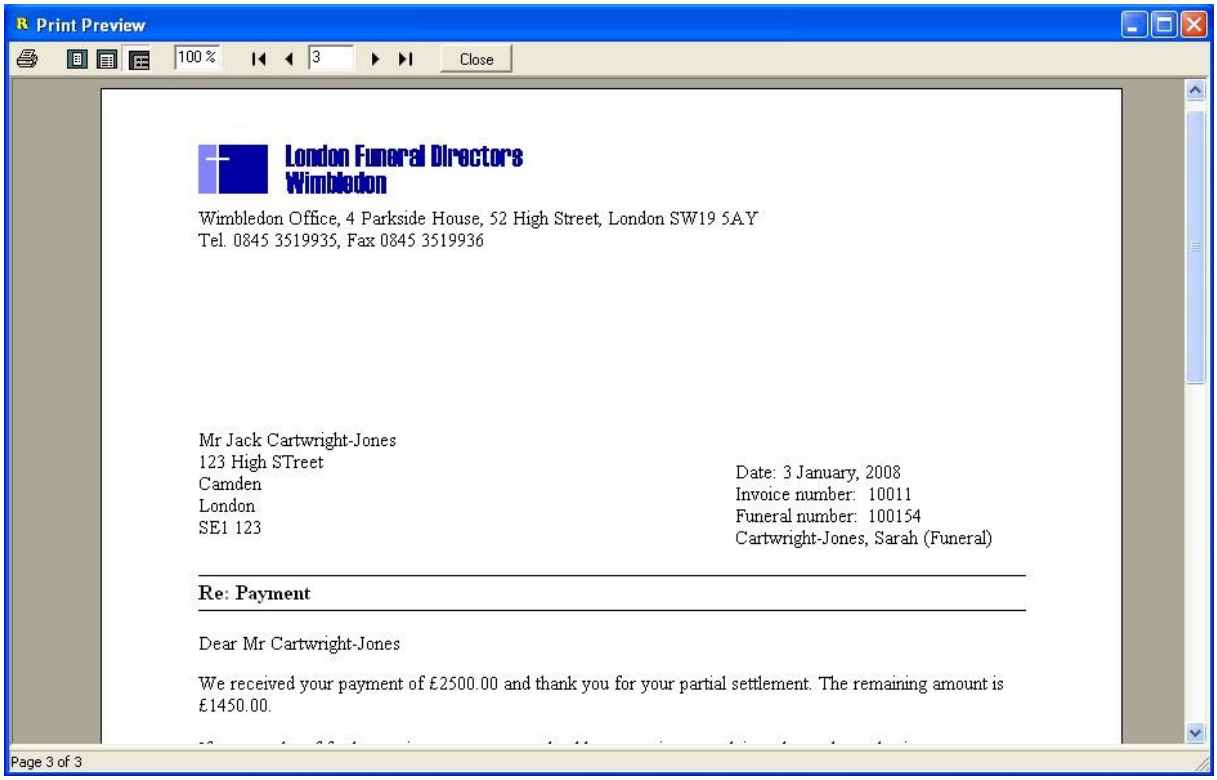
Re: Payment

Dear Mrs Jones

We received your payment of £2223.00 and thank you for your settlement.

May we take this opportunity of thanking you for enthrusting us with these arrangements, which we trust

Page 2 of 3



Print Preview

London Funeral Directors
Wimbledon

Wimbledon Office, 4 Parkside House, 52 High Street, London SW19 5AY
Tel. 0845 3519935, Fax 0845 3519936

Mr Jack Cartwright-Jones
123 High STreet
Camden
London
SE1 123

Date: 3 January, 2008
Invoice number: 10011
Funeral number: 100154
Cartwright-Jones, Sarah (Funeral)

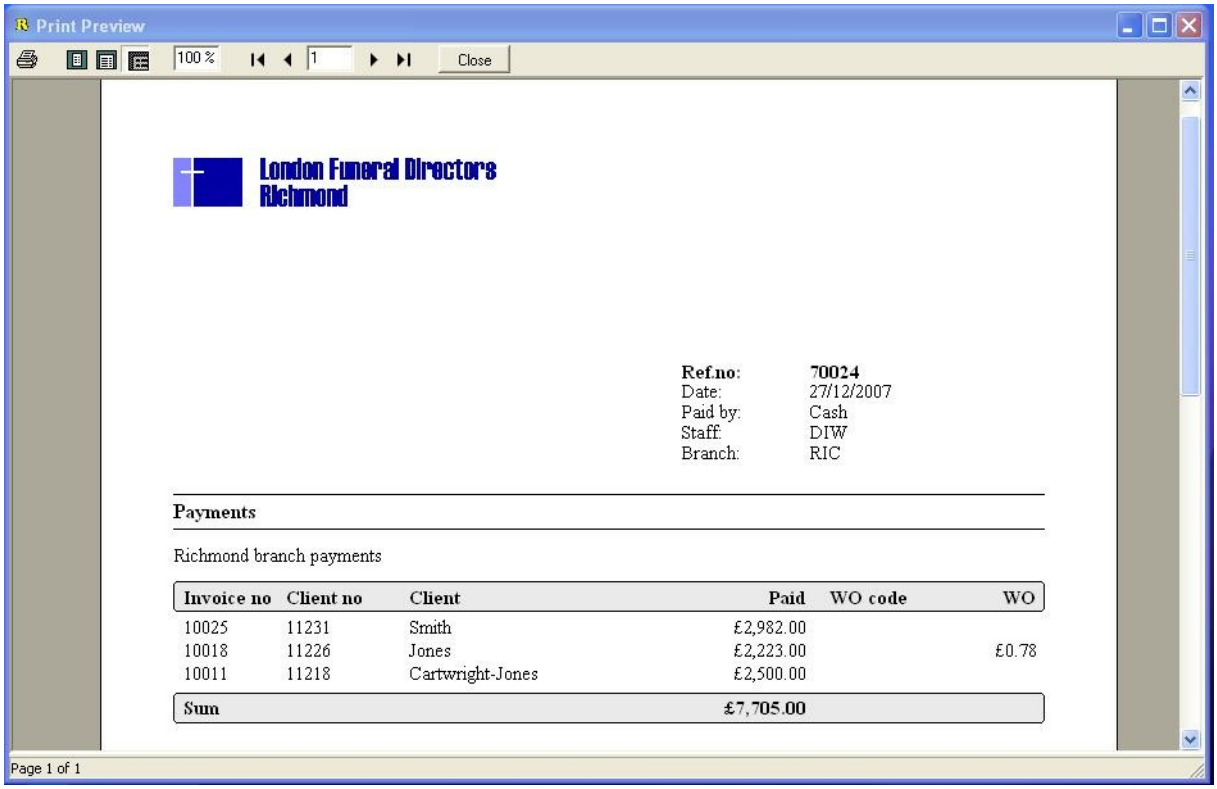
Re: Payment

Dear Mr Cartwright-Jones

We received your payment of £2500.00 and thank you for your partial settlement. The remaining amount is £1450.00.

Page 3 of 3

An internal type document is also available to print which is simply an overview of the payment record. Simply select **Payments** using the usual **Print** buttons.



Print Preview

London Funeral Directors
Richmond

Ref.no: **70024**
Date: 27/12/2007
Paid by: Cash
Staff: DIW
Branch: RIC

Payments

Richmond branch payments

Invoice no	Client no	Client	Paid	WO code	WO
10025	11231	Smith	£2,982.00		
10018	11226	Jones	£2,223.00		£0.78
10011	11218	Cartwright-Jones	£2,500.00		
Sum			**£7,705.00**		

Page 1 of 1

L Printing Options

L.1 Introduction

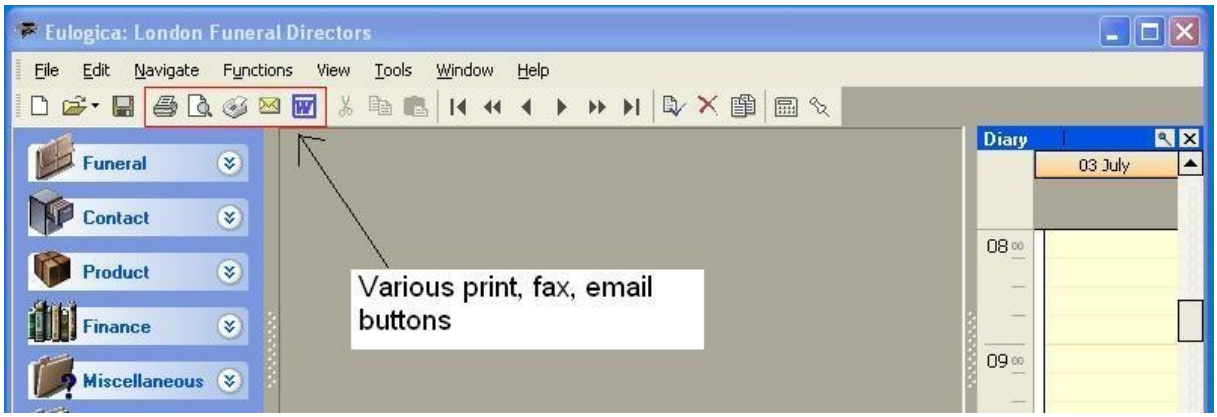
There are various ways of producing documents in Eulogica. They can be printed directly to the printer, previewed prior to printing, faxed, emailed or opened in a word processing package (e.g. Microsoft Word or OpenOffice Writer). The faxing and emailing options will depend upon the set-up of your system.

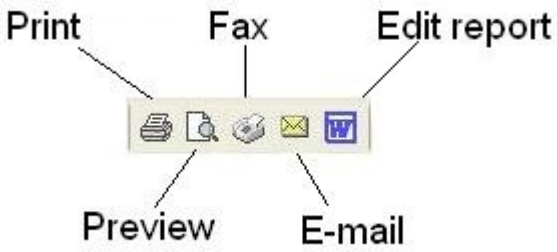
Accessing the various options for producing documents is the exactly the same procedure no matter what document you are trying to print. For example, if you are wanting to print off a client confirmation letter you must first of all open the particular funeral you are interested in. You will then be given the options to print various documents relating to this funeral.

If you are trying to print something from the diary you must open up the diary to the day(s) required and then select the required print option.

The various printing, faxing and emailing option buttons etc are visible in the top of the window.

The screen shots below shows the location of the various print, fax, email buttons and what they are.





All the buttons present you with the same document options depending on which window you have open. If you have a particular funeral window open, then each button will present you with the various documents which are available for printing etc. The only difference between the buttons is where the document is produced.

L.1.1 Print

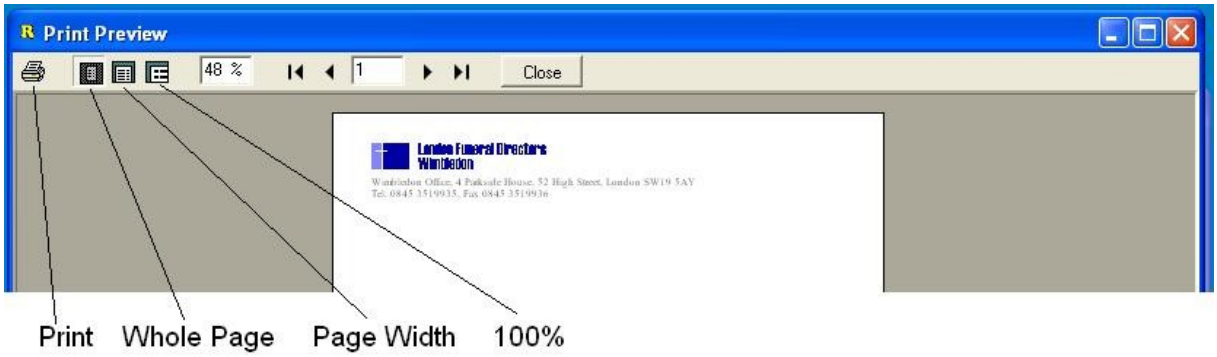
The first button is the direct print button. This option will send whatever particular document you have selected straight to the default printer.

L.1.2 Preview

The second button is the preview button. This option allows you to view the selected document on screen before printing. You can change the size of the preview by using the 3 buttons in the top left of the window to give either a 'Whole page' view, 'Page width' view or '100%' view. You can also change the percentage by typing the desired percentage in the percentage box and pressing 'Enter' on the keyboard.

You can also view any other pages within the particular document by using the arrow buttons to scroll through the various pages (assuming the particular document has more than one page).

The screen shot below shows the various viewing option buttons.



If you are happy with the results and want to print the document you can then click the 'Print' button at the far top left of the window. If you do not wish to print the document simply click the 'Close' button.

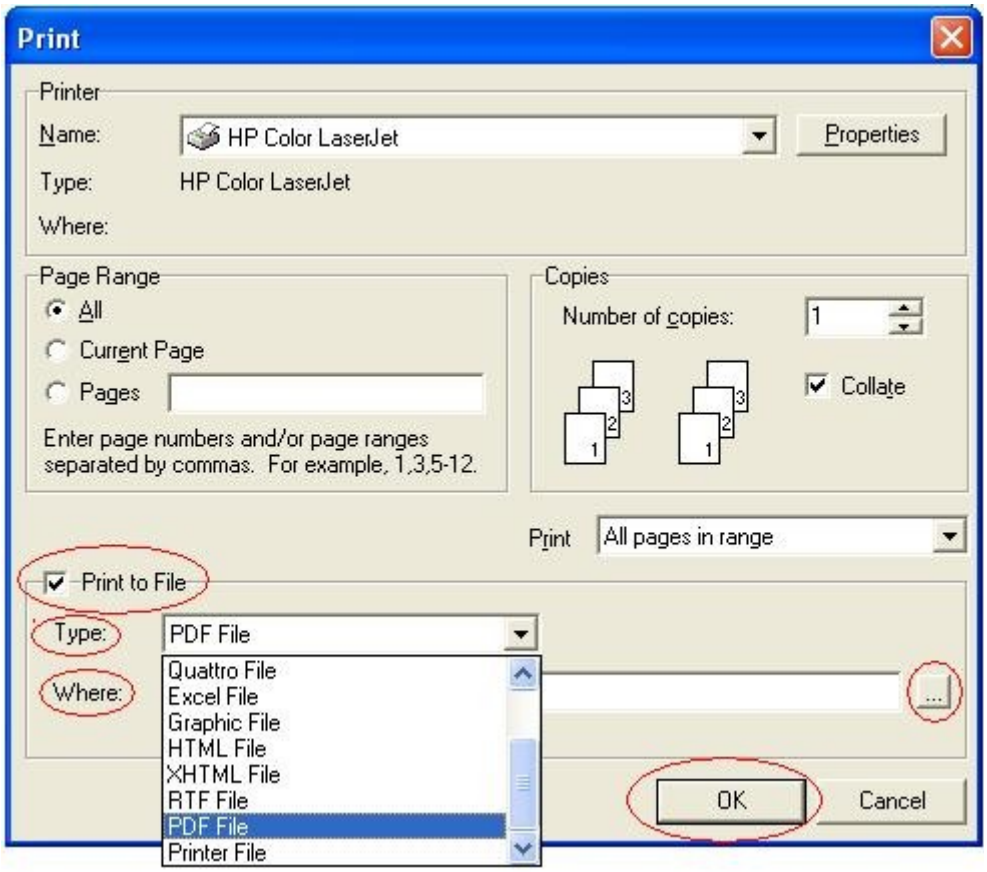
L.1.2.1 Exporting a document to a file

Using the Print preview button also gives you the option to export documents to various formats. These formats include PDF documents, Excel documents, HTML documents and a few others.

To export a document to a file, first of all you need to use the **Print preview** option. This will open up the document you have selected for viewing on the screen. Next click the **Print** button in the top left of the screen.

You will then be presented with the usual Windows print window. Here you can choose your printer, decide which pages to print and how many copies to print etc. You are also given the option to **Print to file** in the bottom of this window. Click in this box and you will then be given the option to choose what type of file you want to save the document as and also **Where** you want to save it to. Select the **Type** and use the button containing the 3 dots at the end of the **Where** field to choose where you want to save the file to. Then click **OK** to save the file (**Cancel** to cancel without saving). The document can then be found by using your normal Windows explorer to open the file.

*The screen shot below shows the Print window and the options available when the **Print to file** tick box is selected.*



L.1.3 Fax

If your computer system is set up to enable you to fax directly from your PC, then using this button will start your fax software and give you the option to fax the selected document.

L.1.4 E-mail

If your system is set up to allow you to use an email program to send emails from your PC, then using this button will open up a new email window and attach a PDF file of the selected document. You can then fill in the recipients email address and type in any other message you desire in the body of the email. The recipient will need a program like Adobe to be able to view the PDF file. For general information about PDF files, see http://www.adobe.com.

L.1.5 Edit Report

Using the Edit Report button will open up the particular document in a word processing package such as Microsoft Word. If desired, this will enable you to make changes to the report before printing.

Please note that once you have opened a document in a word processing package such a Microsoft Word, any changes made within the word processing package will not be saved or reflected in Eulogica.

M Work

M.1 Introduction

Eulogica has a staff allocation system, whereby a member of staff can be allocated to a certain job. This can help with organising the tasks for each day and knowing when someone is not available for a job. The Work system is built into the Funeral window, as well as individual service icons. It can also be used freely, for any odd jobs that are not necessarily associated with a funeral.

The Work records can be used so that you can see exactly who will be doing what, and at which times, throughout a funeral. This could be right from the initial preparations through to the very last tasks. You can keep track of how much each job will cost. For example, you may have casual staff working one day and want to make a note of how much you have agreed to pay them – this can be entered as a Work record and you have details of the times, amounts and names of the staff.

M.2 Allocating Work

M.2.1 Locations of Work records

There are 3 places where you can view and allocate Work records. These are as follows:

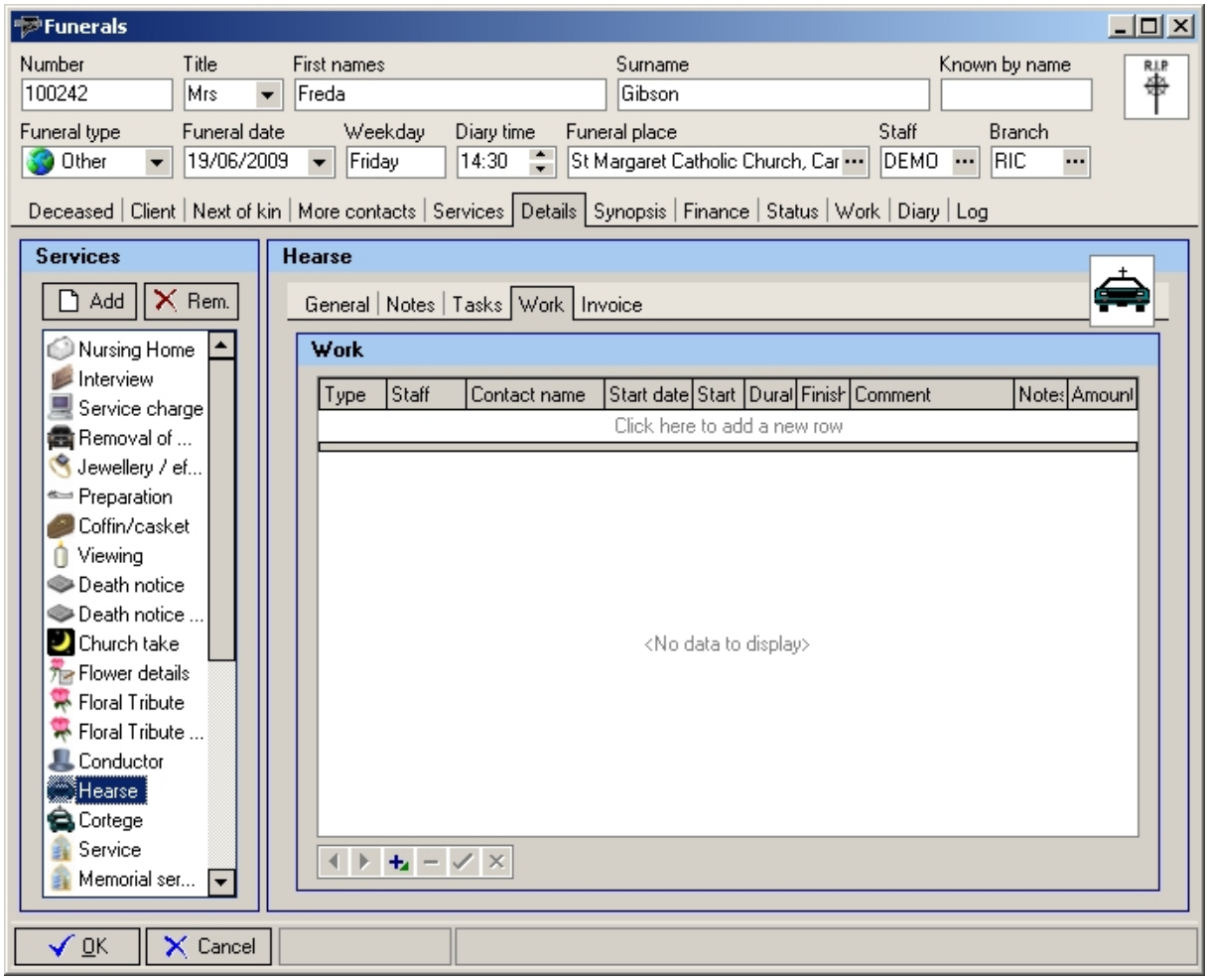
- **Funeral record** — Open a Funeral record and you will see the **Work tab**.
- **Funeral Details tab** — Open a Funeral record and go to the **Details tab**. You will notice that each Service has its own **Work tab**. These are reflected in the **Work tab** of the funeral.
- **Miscellaneous | Work** — On the main menu, open the **Miscellaneous** menu. Here there is the option **Work**. This will open a list of all the Work items across the system. Here you can press the **New** button to create a new Work item.

Work records are all stored in one big list. The 3 methods above are the various ways of viewing and adding to this list. If you add a Work record in the Details tab, it will show in the Funeral | Work tab and also in the Miscellaneous | Work list.

M.2.2 Creating a new Work record

M.2.2.1 Creating Work records in the Funeral Details tab

The most common method of entering a Work record would be through the **Details tab** within a Funeral window. Open a Funeral as usual and go to the **Details tab**. Choose the service for which you want to allocate a member of staff, for example the **Hearse** icon. You will notice the **Work** tab for this icon. The screen shot below shows this tab, currently empty of Work records.



A good example of a Work record for the Hearse icon would be to add the driver of the hearse. Click on the line that says “Click here to add a new row”. Click in the **Type** column and you will be shown a list of all the Work Types in the system. These can be changed and added to, which will be described further on in this manual. Choose the type of Work you are allocating, in the example here this would be Driver.

When you select a Type, some of the other values will be filled in, which you can now change. To help speed the process of adding Work to a Funeral file, the default **Start date** for the Work record will match the date field on the **General tab** of the Service icon, or the **Funeral date** if this does not exist. You now need to select the **Staff** member that is doing the work. By default this is the person that is logged into Eulogica.

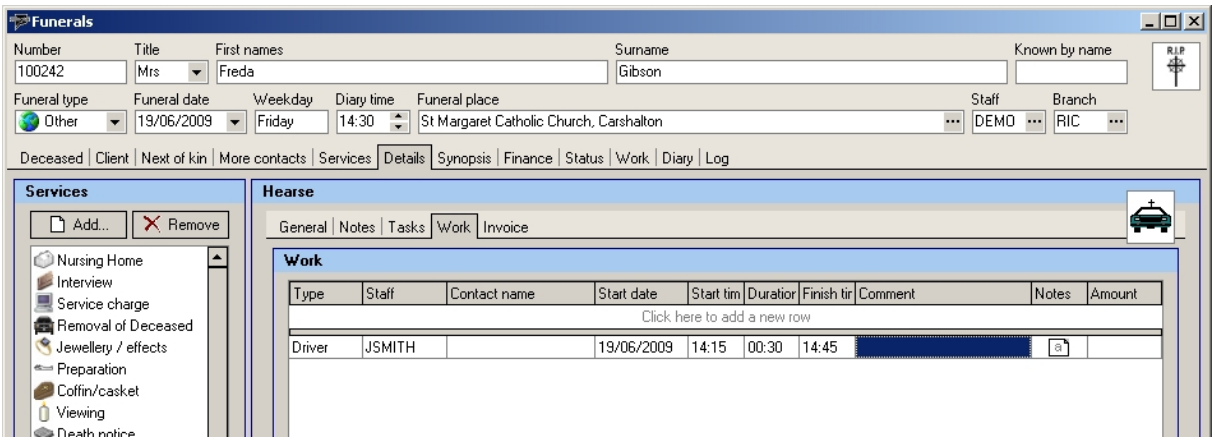
If required, you can also enter a **Contact name**, such as an external company or person.

The next options would be to enter the times involved with the Work. You can enter a **Start time** and then either a **Duration** or **Finish time**. Depending on which of these you fill in, the other will be calculated for you.

The **Comment** and **Notes** fields can be filled in to provide additional details.

The **Amount** field can be used to enter either the cost or the wage for the Work. For example, you can put the wage for any work done by casual staff.

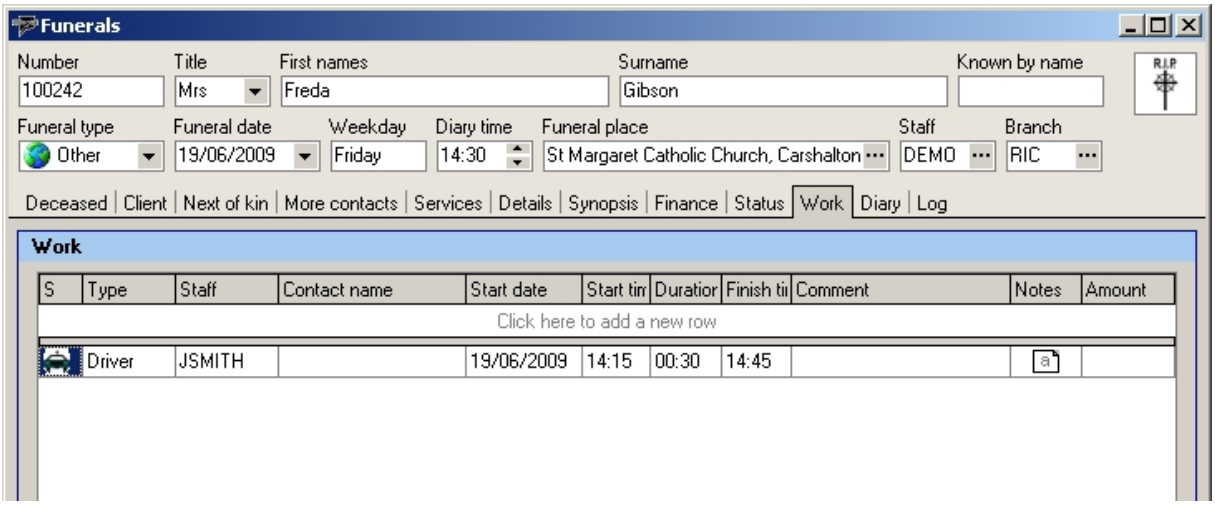
The example of adding a Driver to the Hearse service is shown completed in the screen shot below.



A **Start time** of 14:15 has been entered, 15 minutes before the funeral start time, with a **Duration** of 30 minutes. The **Finish time** is filled in automatically.

M.2.2.2 Creating Work records in the Funeral Work tab

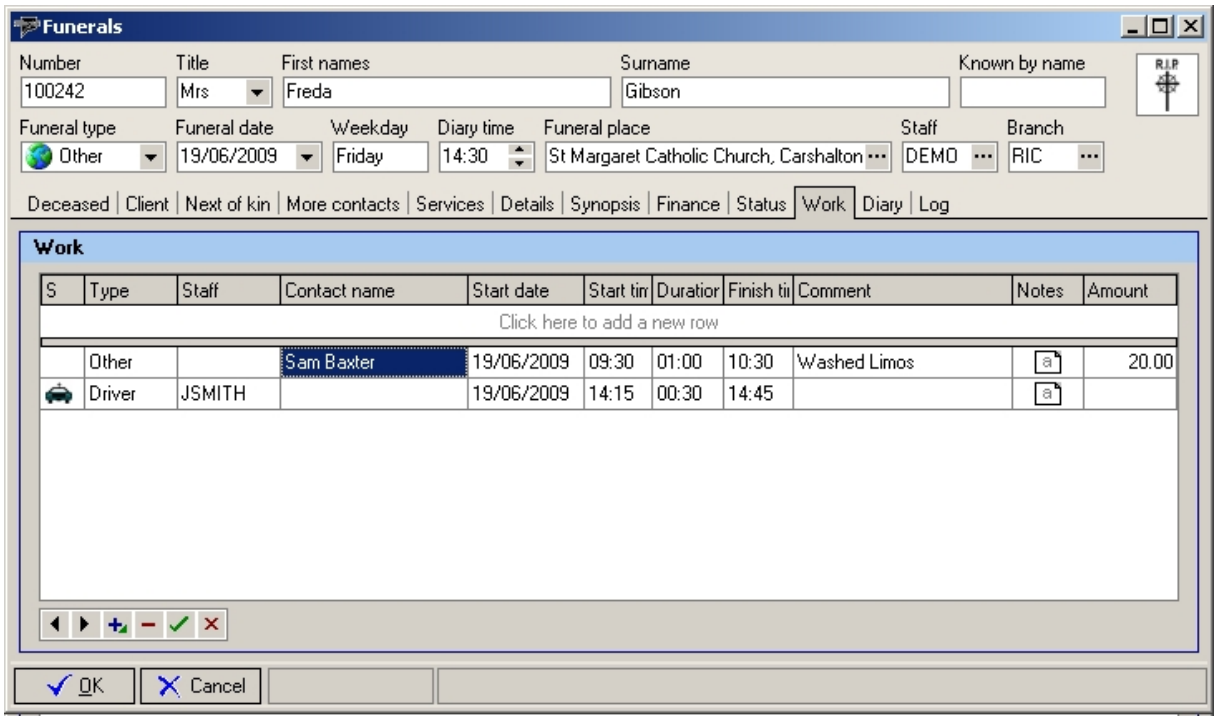
The next method of entering a Work record is through the **Work tab** within a Funeral window. Open a Funeral as usual and you will notice the **Work** tab. The screen shot below shows this tab, which already contains the Work record entered in the **Details** the above example.



The columns in this version of the **Work tab** are the same as the others, with the addition of the **S** column, which shows the icon of the **Service** if the Work record was added directly to a Service via the **Details tab.**

To add a new Work record either click in the top row that says “Click here to add a new row” or click the plus sign at the bottom-left of the window, shown below.

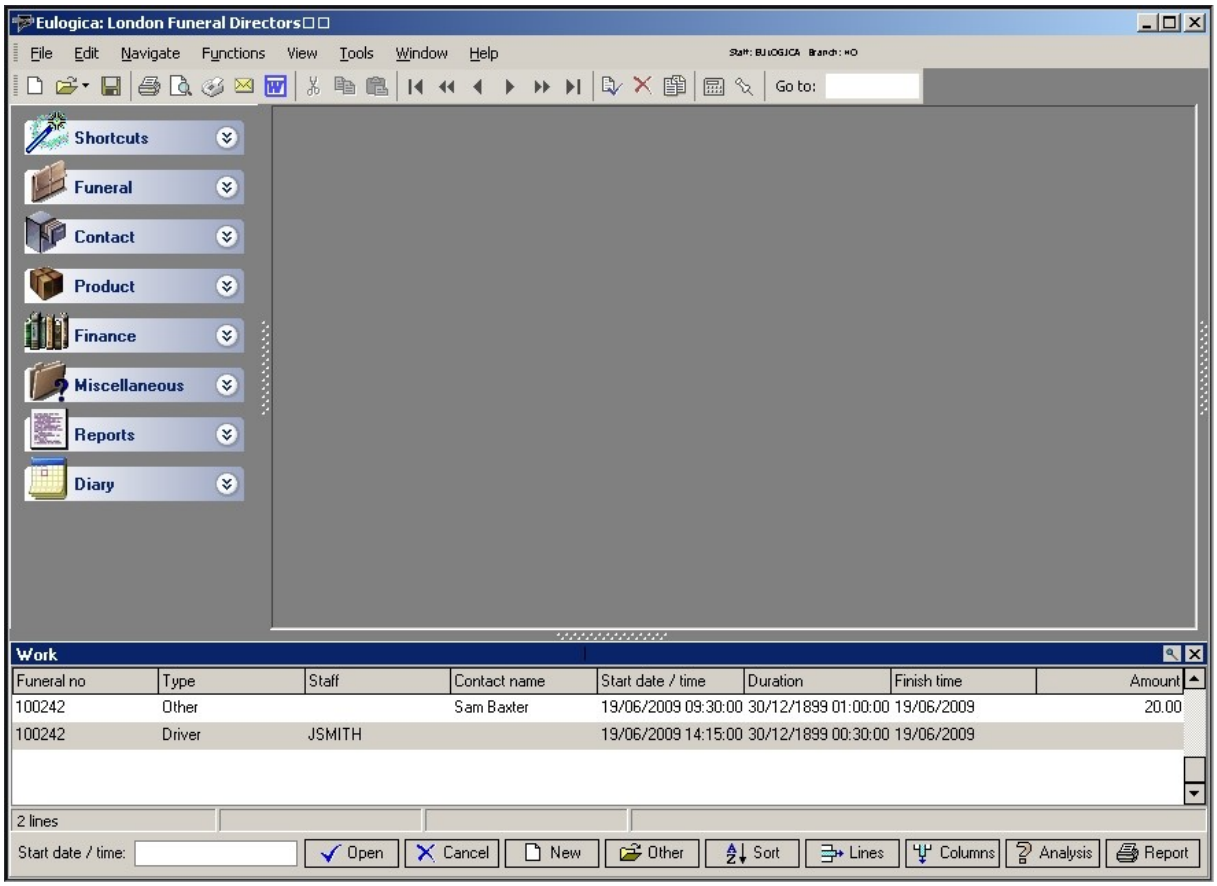
You can now enter the details as per the previous example. The only differences here are that the **S** column will not be given an icon and the **Start date** will not be automatically filled in.



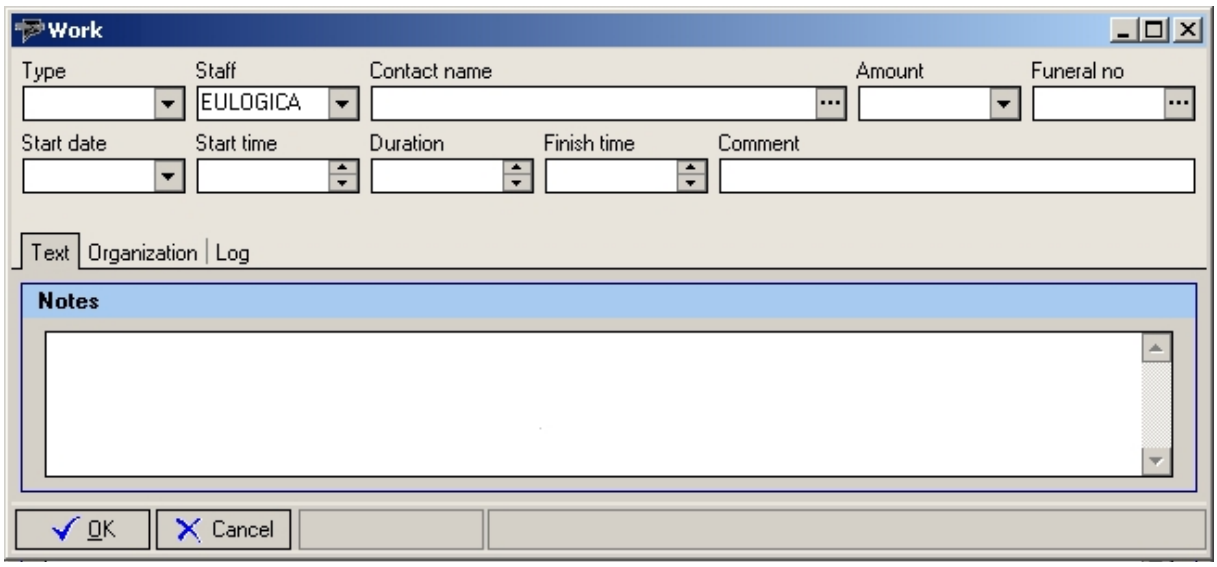
In this example the **Job type** has been set to Other. The **Staff** field has been cleared and the **Contact name** field has been filled in with the name of a casual staff member. To specify the work being done the **Comment** field has been filled in to say “Washed Limos”. The **Amount** has been filled in to reflect the payment given to the staff for the work.

M.2.2.3 Creating a Work record directly through the Main Menu

The third method of creating a Work record is through the **Main Menu**. Open the **Miscellaneous** section of the **Main Menu** and click on **Work**. This will open the list of all the Work records in the system. The screen shot below shows this list, where the 2 Work records entered in the previous examples can be seen.



Press the **New** button at the bottom of the screen to open a blank **Work** window, shown below.



The **Work** window has the same fields as when entering a Work record from the Funeral window. The additional **Funeral no.** field allows you to choose a Funeral file from the system by pressing the button with the three dots on it. This will not bring up the list of Funerals – it will display all the separate Service icons from all the funerals. This allows you to tie the Work record to a specific Service icon. Choose the service from the list and press **Open**..

When you have entered all the information you need, press the **OK button** to save the changes and close the window. The Work record will be accessible from the **Miscellaneous | Work** menu.

If you specified a **Funeral no.** by choosing a Service icon from the list the Work record will be shown in the funeral record.

N Letters

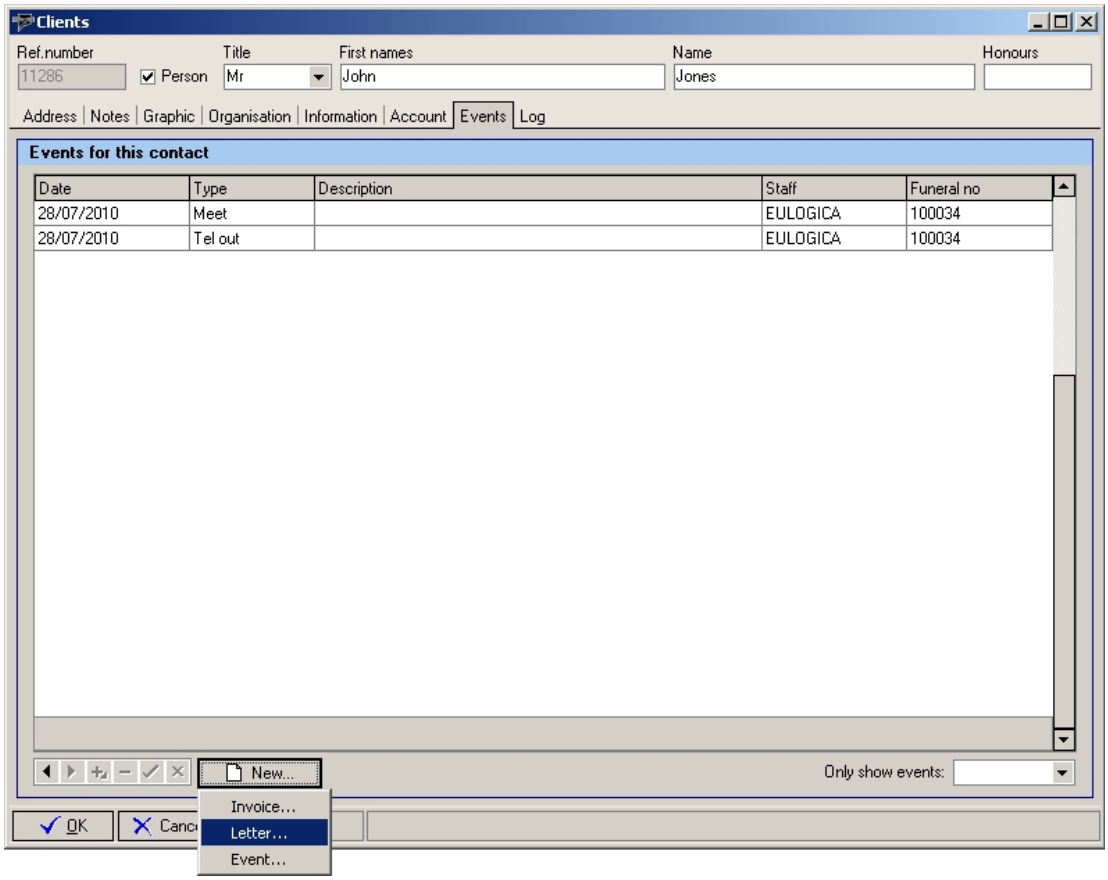
N.1 Writing a letter in Eulogica

You can use Eulogica to write up letters, bringing in the address details straight from the database. You can also set up standard letters so that the wording you regularly write is brought straight in for you. Each letter can be marked as sent and is tracked in the Events list of the contact it was sent to. This means that a history of your communication is kept in the system for easy reference.

There are two ways of starting a new letter to a contact – direct from the Contact File or as a blank letter from the Main Menu.

N.1.1 Creating a letter from a contact file

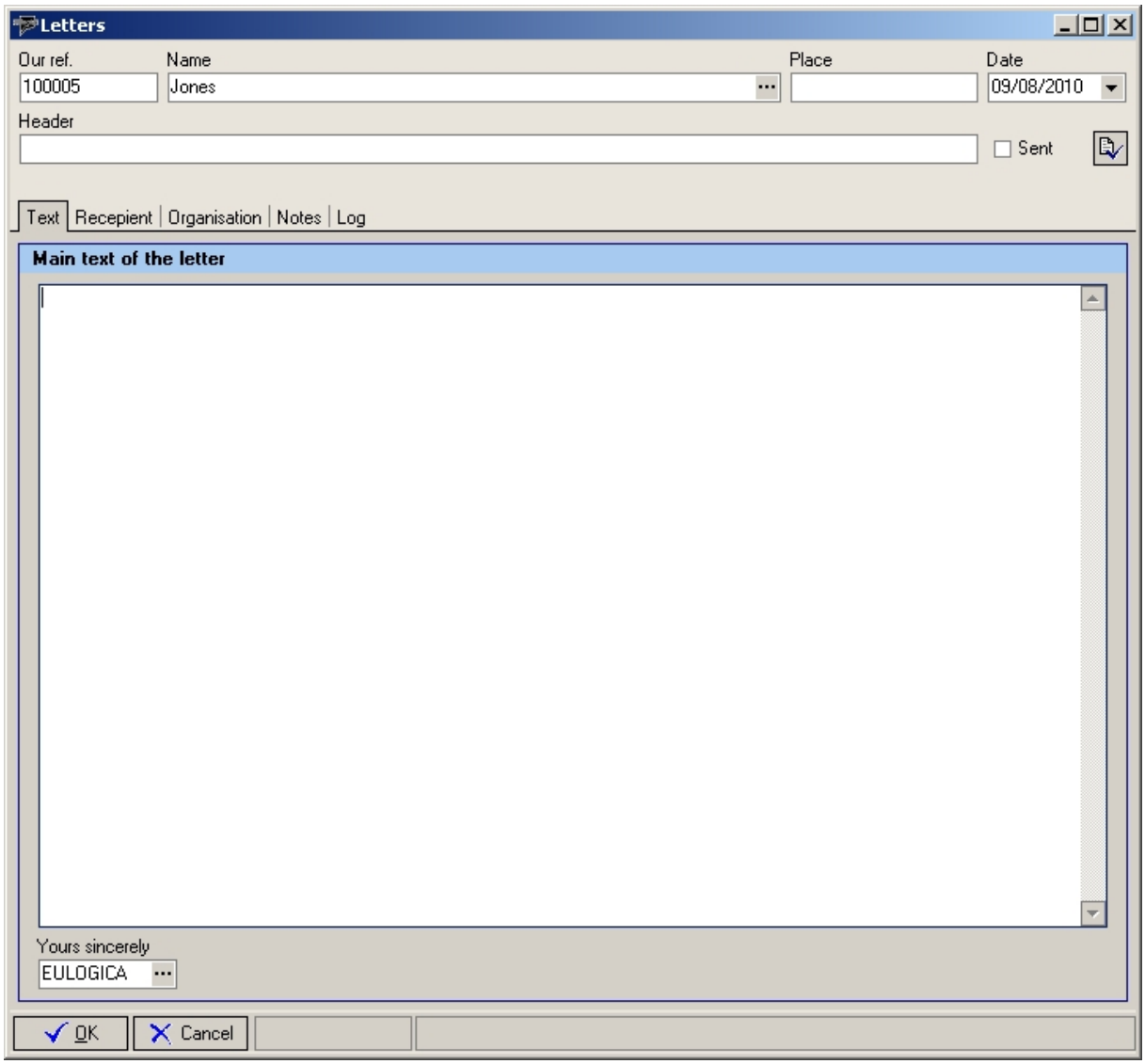
To create a letter from a contact file you first need to open the contact file, either from the client or a supplier from within a funeral or from **Main Menu | Contacts**, choosing the required category and then finding the contact you want. With the contact file open, go to the **Events** tab. If you press the **New...** button at the bottom you will be presented with various options, one of which is **Letter...**, as shown below. This will bring up a new blank letter, with the contact details filled in for you.



N.1.2 Creating a letter from the Main Menu

On the **Main Menu**, open the **Miscellaneous** menu and select **Letters**. This will bring up a list of all the letters that have been created, in the same way that Funerals or Contacts are displayed. You will be able to see the date of the letter, references, header and if the letter has been marked as sent, along with branch and staff details and, of course, the recipient. As with creating a new funeral or contact file, press the New button at the bottom of the list, or the New button at the top-left of the screen. If you have templates set up you will be able to choose which to use, for a blank letter choose "**(None)**". This will open up a blank letter, or a letter based on a template if you chose a template. Note that if there are no templates set up you will not get any options and a blank letter will be created.

N.1.3 The Letter window



The screenshot above shows a new blank letter. The **Our ref** field is generated automatically but can be changed if necessary. The **Yours sincerely** box is based upon the person who is logged in, but can be changed and is where you set the sender of the letter. The **Date** field is filled in with the current date. If you create a new letter from a contact file, the **Name** field will be filled in for you. The **Header** field is where you will fill in the subject line for the letter.

N.1.4 Choosing a recipient

To choose who you are sending a letter to you must first specify the contact file. To do this click on the button with three dots, to the right of the **Name** field. This opens the Clients contact list. Choose a client by double-clicking on them or selecting them from the list and pressing the **Open** button. If you want a contact from another list, such as Churches and Chapels or Doctors, click the **Other** button at the bottom right and choose the contact file necessary from the options that appear. You can then choose the correct contact as usual.

When you have chosen your contact the **Name** field will be filled in and the letter's recipient is set to the person marked as **Main Contact** within the contact file. You can change this by going to the **Recipient** tab and clicking on either of the buttons with three dots next to the Contact person first name and Contact person surname fields. This will bring up a list of names from the **More Contacts** tab of the contact file. If you chose the button for first name then the list will be sorted by First name and by Last name if you chose the surname button. Double click the person or select them and press **Open** to choose the recipient you want.

N.1.5 Saving a letter for later

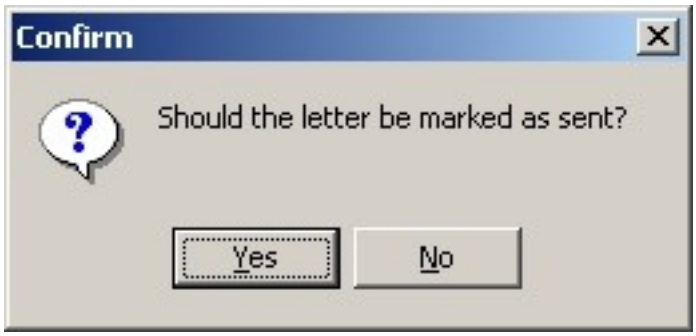
If you wish to save your letter and come back to it later you can click th **OK** button at the bottom of the letter window. This will ask you if the letter should be marked as sent. Unless you have printed and sent your letter, choose No. This will save your letter and close the letter window. If you choose Yes the letter will be marked as sent before it is saved.

To open the letter again, on the **Main Menu** open the **Miscellaneous** menu and select **Letters**. This will bring up a list of all the letters that have been created. Locate your letter in the list and either double-click it or select it and press the **Open** button.

N.1.6 Printing and marking a letter as sent

Once your letter is ready you can print or email in the usual manner. For more information on this please see the Printing Options section. When you have sent the letter you can either tick the **Sent** tick box or press the button next to this, shown here:

You can also press the **OK** button in the bottom left, which will also ask you if you wish to mark the letter as sent. Whichever option you take, you will be asked this question:



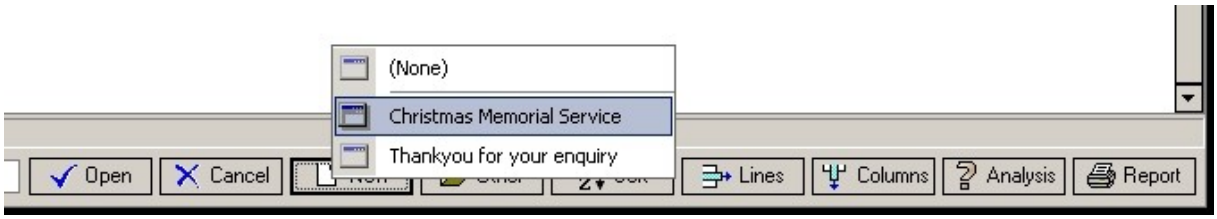
Choosing Yes will mark the letter as sent, which also marks an Event in the contact file saying that this letter has been sent.

N.2 Letter Templates

The system can store templates for use when writing letters. These can be used to bring in a standard set of text which can then be edited as necessary.

N.2.1 Creating a letter from a template

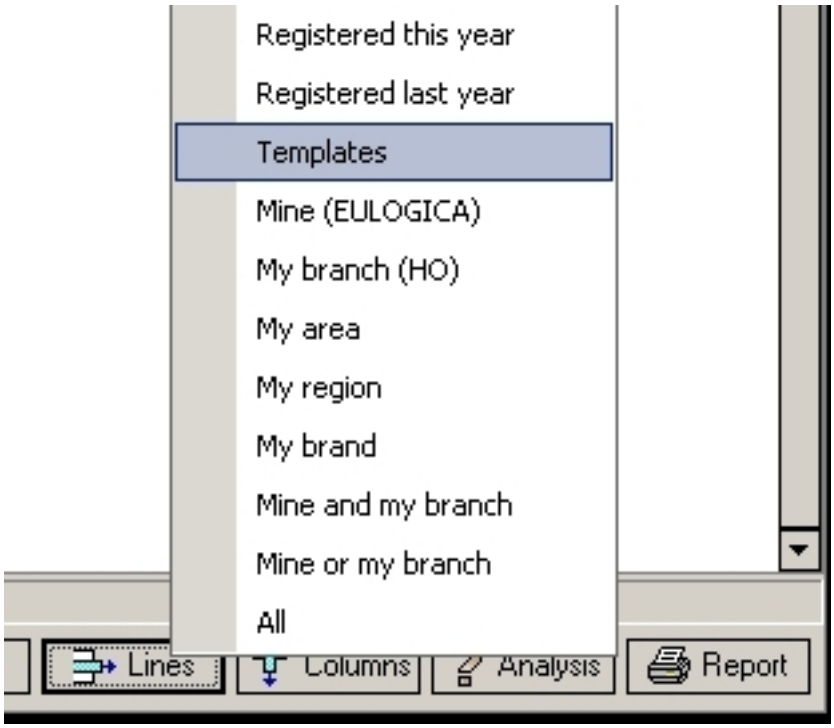
On the **Main Menu**, open the **Miscellaneous** menu and select **Letters**. This will bring up a list of all the letters that have been created, in the same way that Funerals or Contacts are displayed. As with creating a new funeral or contact file, press the New button at the bottom of the list, or the New button at the top-left of the screen. If there are any templates stored in the system, you will be given a list to choose from when you click **New** as shown below.



Selecting a template from the list will create a new letter, ready to edit, with the text and header line as per the template. All you have to do is choose a contact to send it to and you are ready to send it. You can also edit the text for the individual letter before sending, if necessary.

N.2.2 Creating a new template

To create a new template go to the **Main Menu**, open the **Miscellaneous** menu and select **Letters**. This will bring up a list of all the letters that have been created. Now press the **Lines** button at the bottom right and choose **Templates** from the options that pop up.



This will change the list from displaying the letters in the system to displaying the templates instead. Here you can press the **New** button which will bring up what looks like a blank letter. You can write your letter as usual, giving it a header and putting text in the body. Do not fill in the other fields at this point though. When you are done, press the **OK** button. At this point you will be asked to give a name to the template. Enter a name and press **OK** or press **Cancel** to go back to editing the template. The template will then appear in the list of options when you go to create a new letter.

N.2.3 Editing an existing template

To edit an existing template, go to the **Main Menu**, open the **Miscellaneous** menu and select **Letters**. This will bring up a list of all the letters that have been created. Now press the **Lines** button at the bottom right and choose **Templates** from the options that pop up. This will change the list from displaying the letters in the system to displaying the templates instead. Find the template you want to edit in the list and select it. If necessary you can change the name of the template at this point, or just press the **Open** button to bring up the template ready to edit.

Simply alter the text as you wish and press the **OK** button to save your changes and close the window.

N.3 The Multiple Letter Wizard

Eulogica has a useful way for you to send the same letter to a batch of contacts. This is called the Multiple Letter Wizard and can save a lot of time. One use for this could be to send all your clients from the last year a letter about a Christmas memorial service.

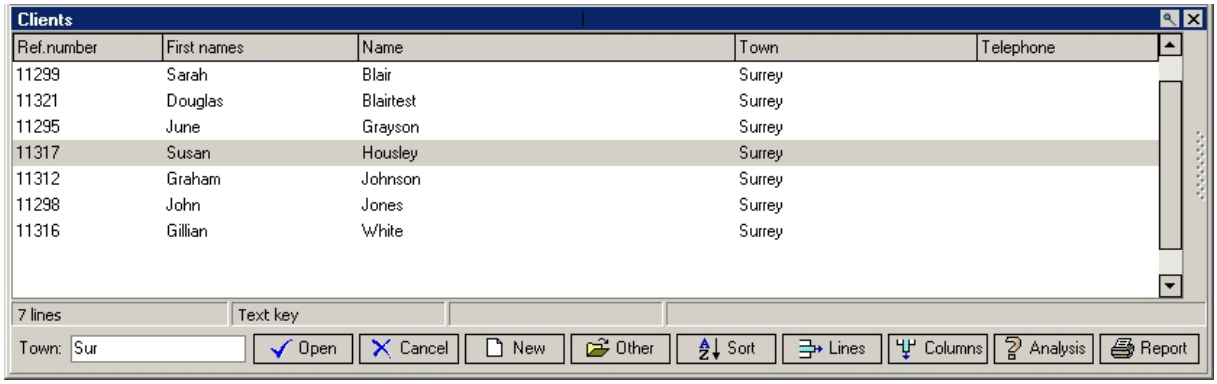
N.3.1 Create a letter template to use

The Multiple Letter Wizard uses the letter templates for creating letters so you need to create your letter beforehand. Follow the steps in the previous section to do this. It will be possible to edit the text of an existing template when going through the wizard.

N.3.2 Preparing the recipients list

The first step when using the Multiple Letter Wizard is to prepare your list of recipients. To do this, open a list of contacts from the **Main Menu**. This could be any of the lists that have a clients or contacts in them. If using a funerals list, letters will be addressed to the clients of invoiced funerals.

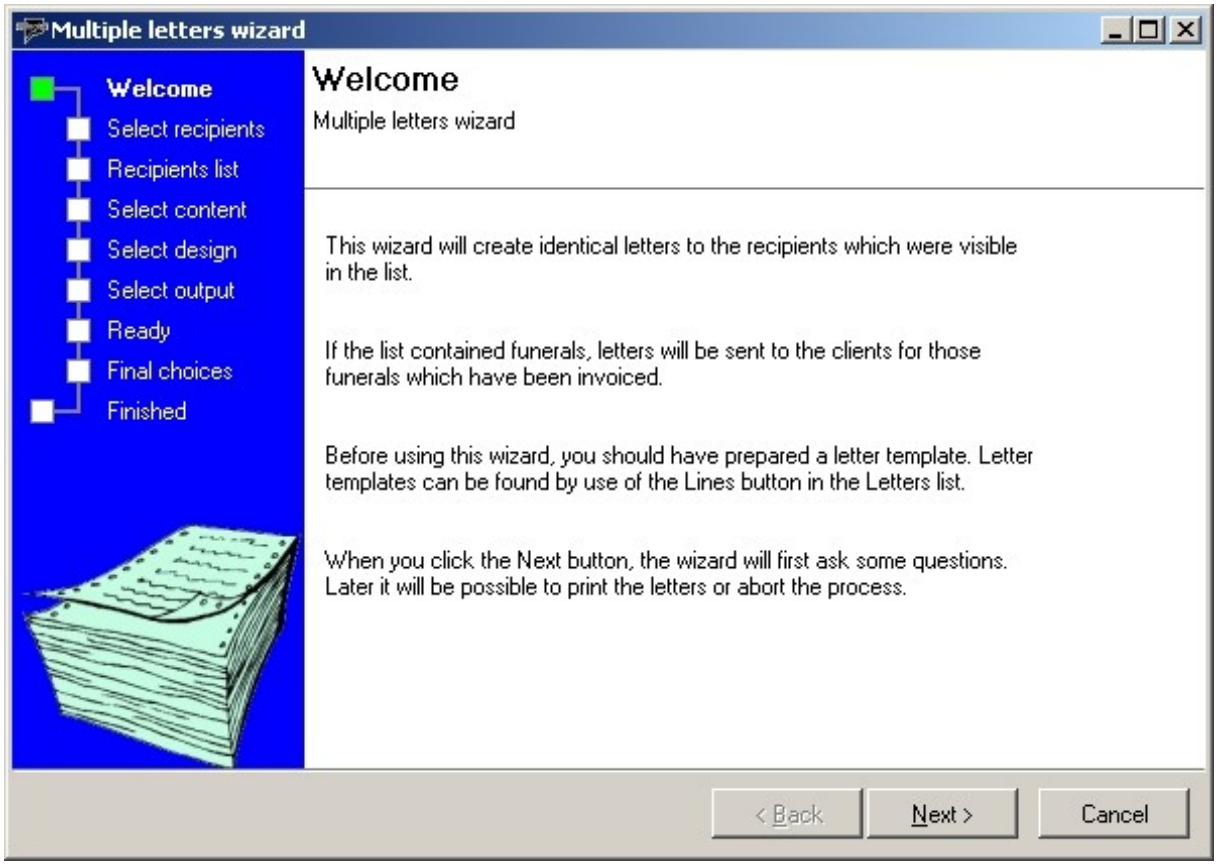
The next step is to filter the list and sort it so that it represents the list you wish to send your letters by using the **Sort** button, as described in **Section E** of this manual. The screenshot below shows a list of Clients (**Main Menu | Contact | Clients**) filtered by town.



N.3.3 Starting the wizard

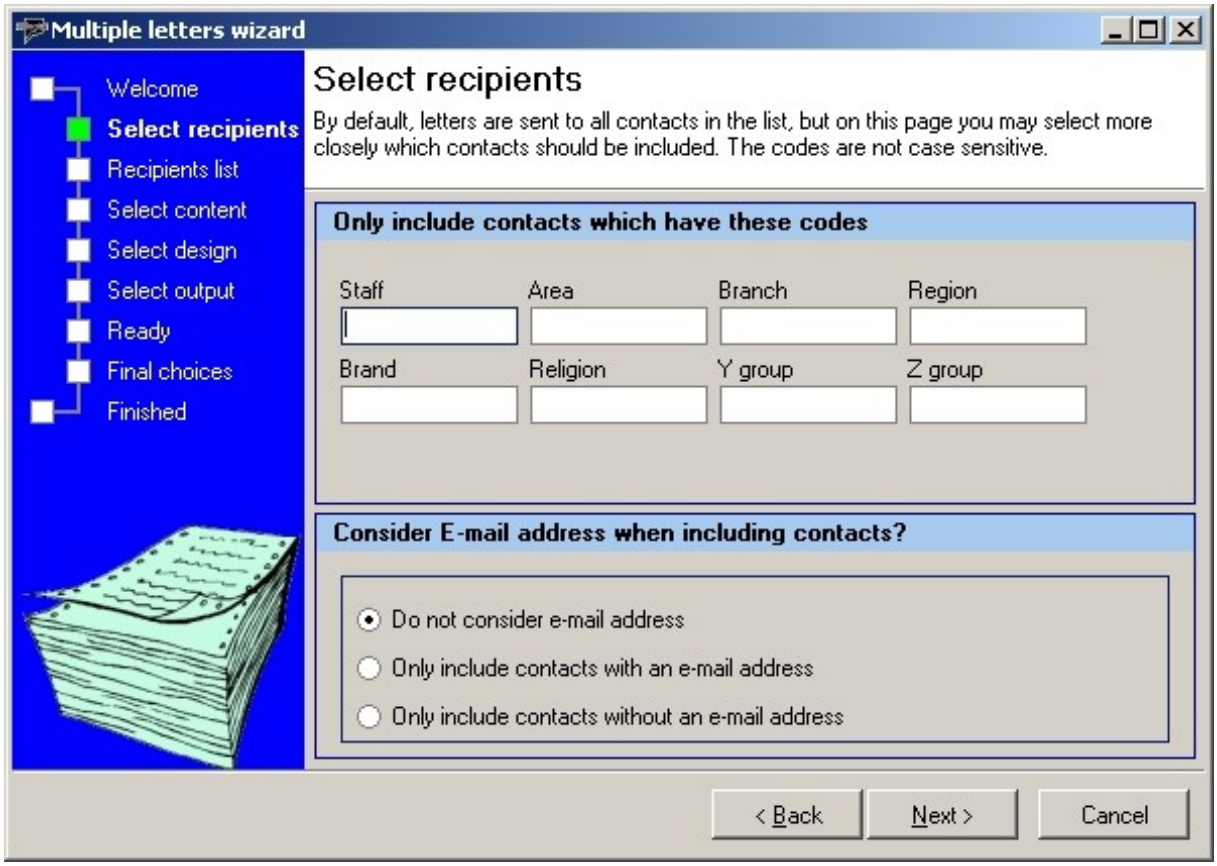
With your list of contacts ready, click on the **Functions** menu at the top of the screen and choose **Multiple letters wizard**

This will start the wizard and you will see the Welcome screen, shown below, which gives you an introduction to the wizard.



On the left hand side you can see your progress through the wizard. Press the **Next** button to continue.

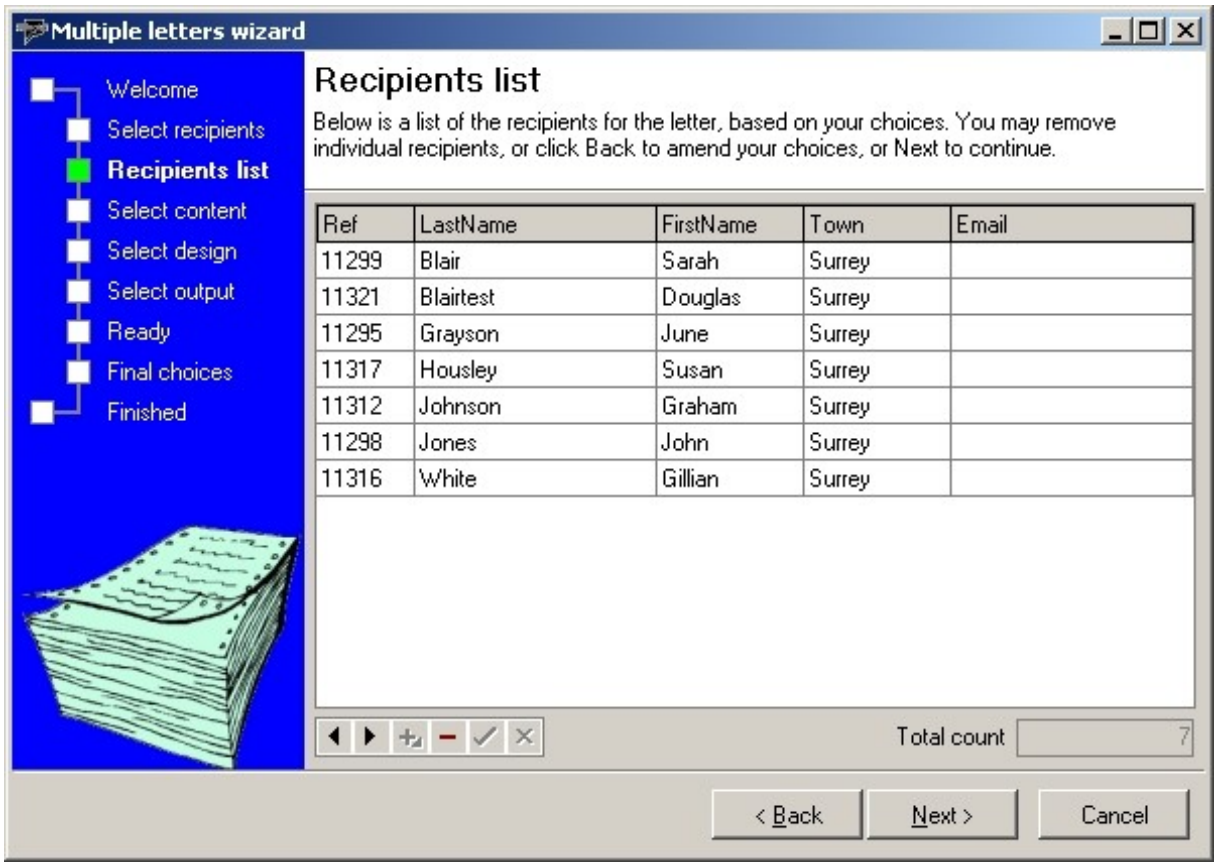
The next screen allows you to filter you list further. There are options that are based on the **Organisation** tab of the contact file, such as the staff member that is responsible, the area, branch , region or brand, the religion of the contact or two of the custom “group” fields.



The bottom section of this screen allows you to find only the contacts with or without an email address. Choosing to only include contacts with an e-mail address will clean the list up if you wish to only email the letters. Choosing to only include contacts without an e-mail address would be useful if you have already sent one batch of letters by email and now wish to send to the remaining contacts by post. If you only wish to post the letters then choose the do not consider e-mail address option.

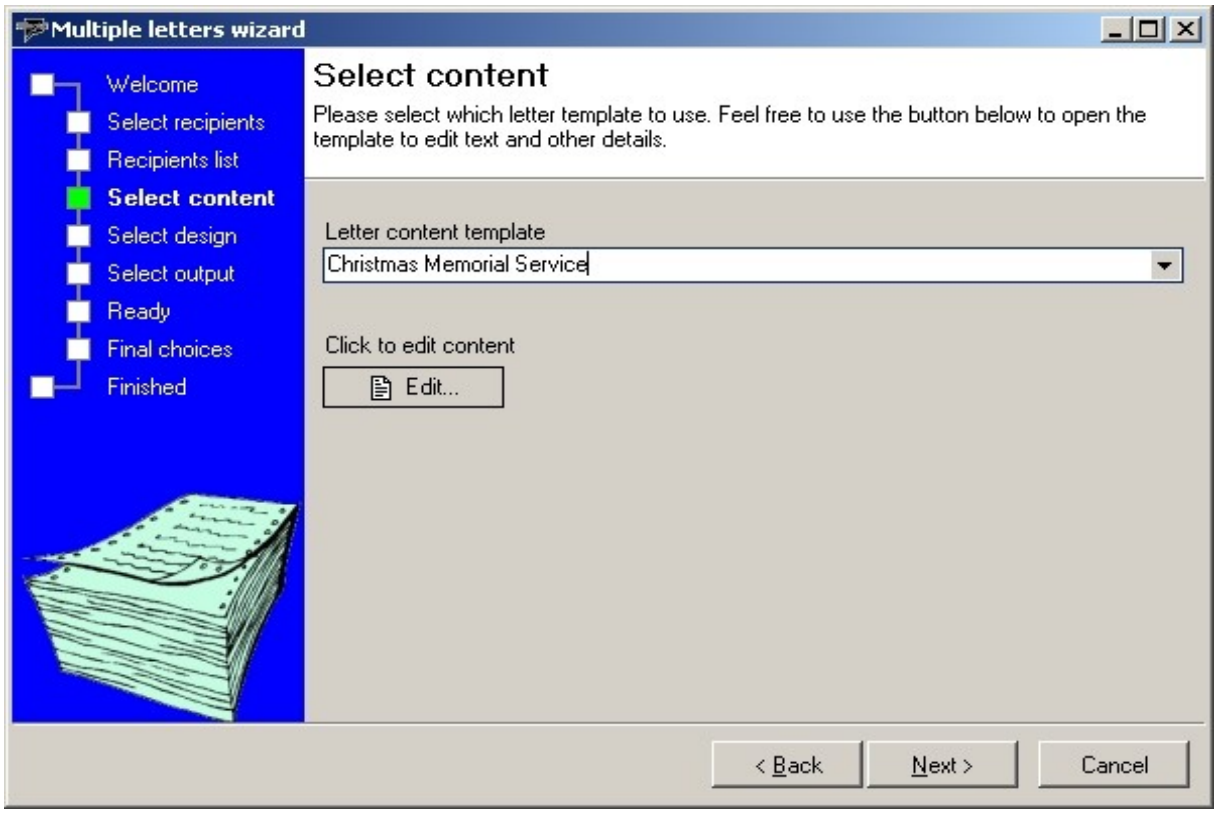
Press **Next** to continue.

The next screen shows you all the contacts that meet your criteria. Here you can remove individual recipients from the list. To remove a recipient from the list, click on their line and then press the red minus button at the bottom of the screen, shown here.



When you are happy with your list of recipients, press the **Next** button to continue.

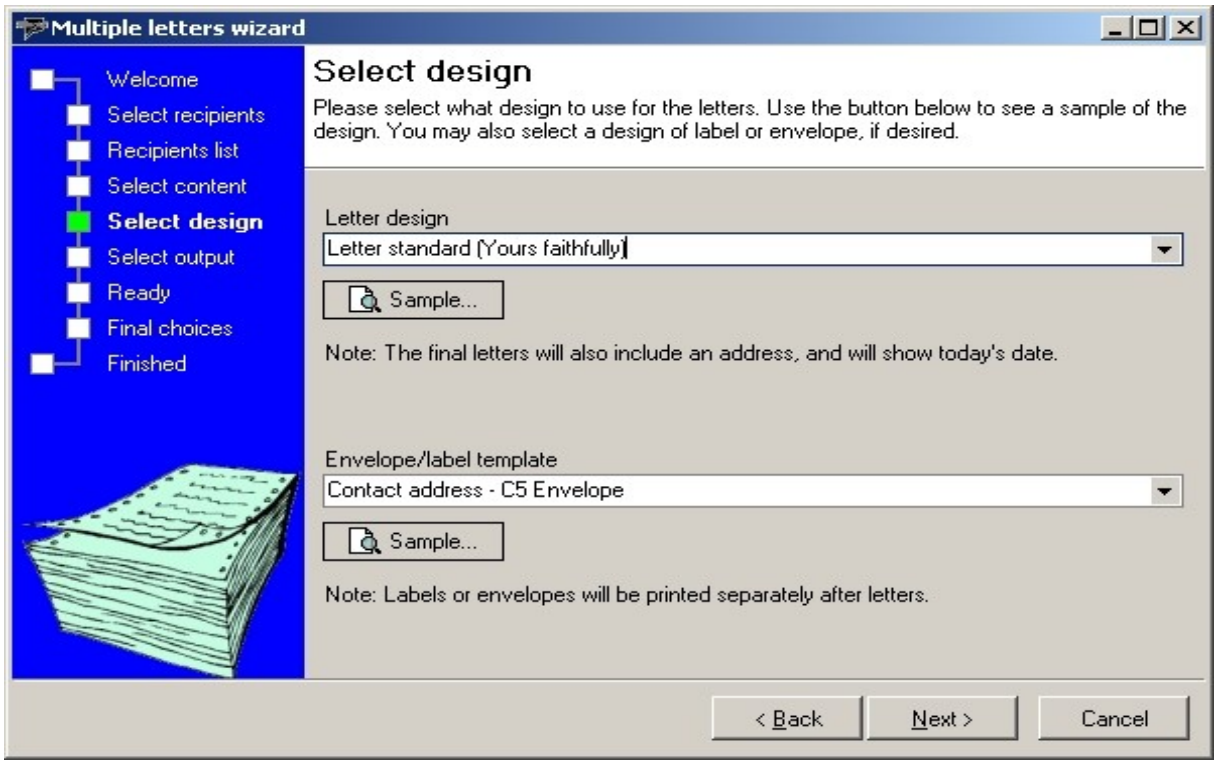
The next screen, shown below, asks you to choose the template for your letter. The drop-down list displays the templates you can choose from.



The **Edit** button allows you to change the text of the letter. This is useful if your template is set up but for this one instance you want to add something extra, or change some wording. By pressing **Edit** you can also change the date which will appear on the letter and who the letter is being sent from. It is always useful to press **Edit** and check that your letter is written how you wish.

Press **Next** to continue to the next step.

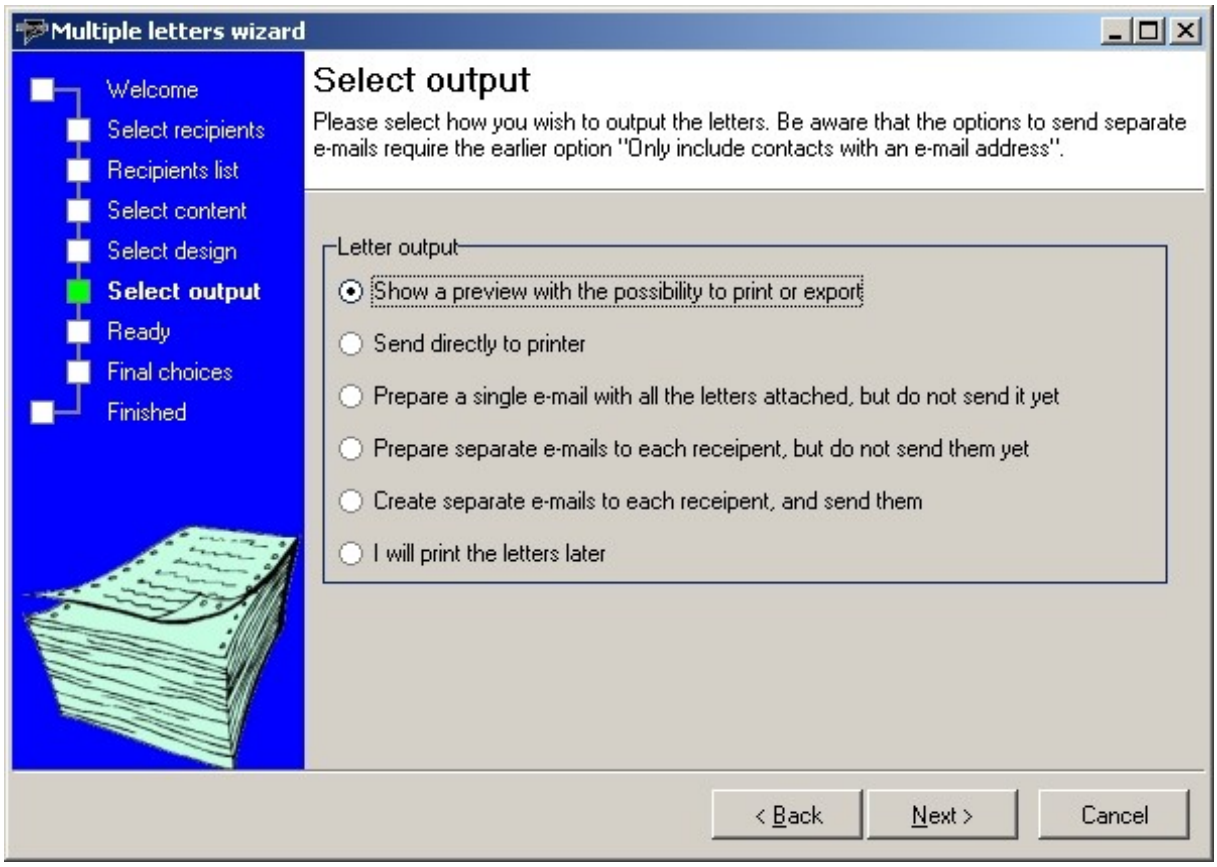
The next step is shown below. This is where you choose the design for your letter and also for your envelopes if you require them. Choose the designs you wish to use from the drop-down boxes. You can press the **Sample** buttons to preview the letter in the selected style.



If you do not wish to print envelopes as well then clear all of the text out of the **Envelope/label template** box by selecting the text and pressing the delete key.

When you have chosen your templates, press **Next** to continue.

The next screen gives you your options for how you wish to generate the letters.



The options are:

- **Show a preview with the possibility to print or export** – this will generate the letters and bring a print preview of them. From this you can then print or export the document as required.

- **Send directly to the printer** – this will generate the letters and print them out, without a print preview.

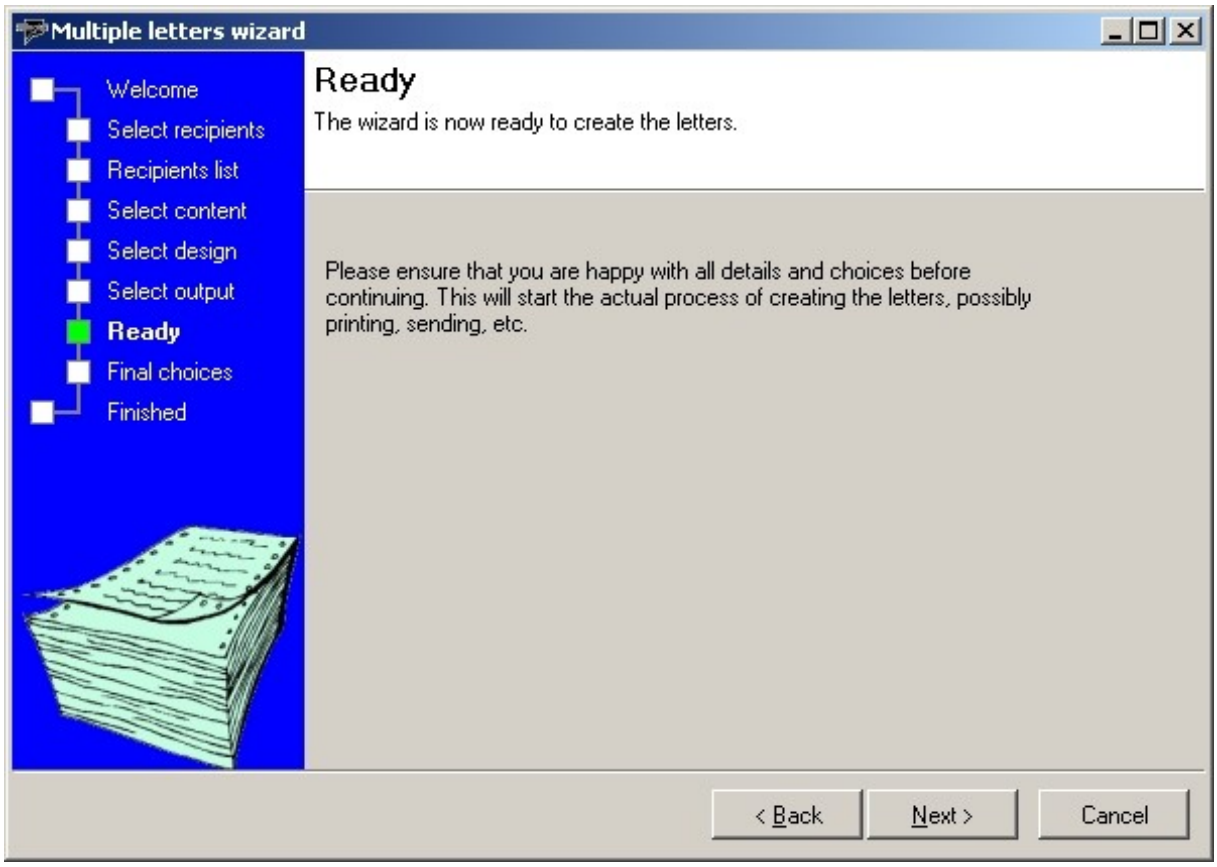
- **Prepare a single e-mail with all the letters attached, but do not send it yet** – this will generate the letters and create a single pdf document, attaching it to a new email.

- **Prepare separate e-mails to each recipient, but do not send them yet** – this will generate the letters and attaches each one as a pdf to a new email to each recipient. The emails will open so that you can edit them before sending.

- **Create separate e-mails to each recipient, and send them** – this will do the same as the above option, except this time the emails will be sent automatically.

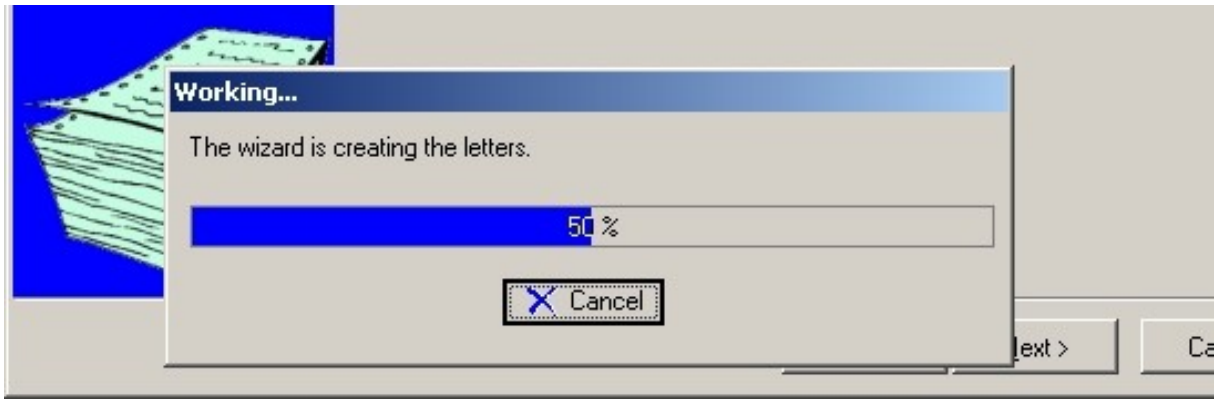
- **I will print the letters later** – this option generates the letters but does not do anything further with them.

When you have chosen the option necessary, click the **Next** button to move to a confirmation screen.

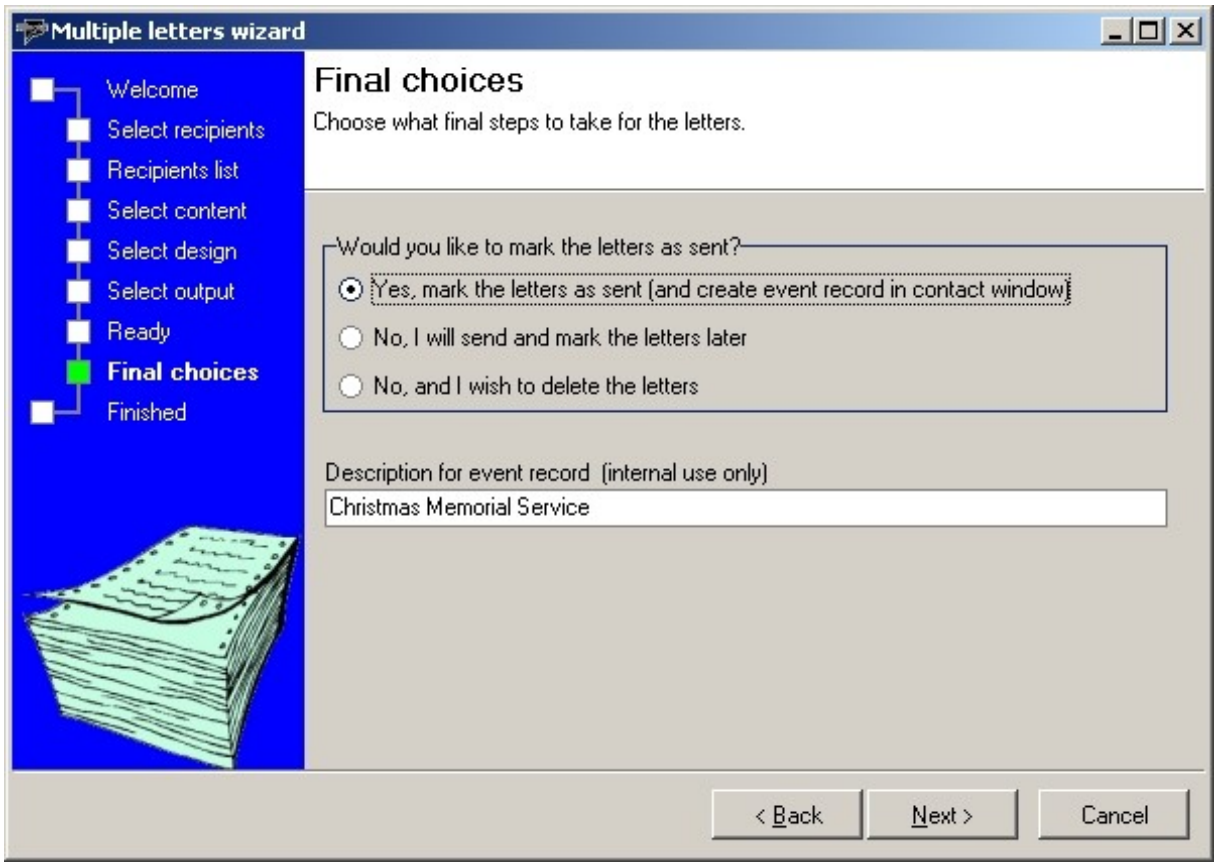


This screen is asking you to make sure you are happy with your settings, as pressing the **Next** button will execute the option you chose for generating the letters.

Press **Next** to generate the letters, or use the **Back** button to go through the previous stages.



When the wizard generates the letters, each one is added to the **Main Menu | Miscellaneous | Letters** list. When the wizard has finished doing this you will be presented with a print preview if you chose that option. If you chose to generate the envelopes as well these will be generated when you close the print preview. If you chose to have emails generated this will be done at this stage.



This last set of questions asks you how you wish to mark the letters within the system. The three options are:

- **Yes, mark the letters as sent (and create event record in contact window)** – this option will mark all the letters as sent and also create an event record in each of the contacts that was in the list.

- **No, I will send and mark the letters later** – this will leave the letters marked as 'not sent' and will not create an event for each contact. The letters will be in the letters list under **Main Menu | Miscellaneous | Letters**.

- **No, and I wish to delete the letters** – this will remove the letters from the letters list and leave no record that you created the letters.

Press the **Next** button to execute your option and finish the wizard. You will see a final confirmation screen that tells you the wizard is finished. Press the **Finish** button to close the wizard.

O Remote Support

Part of the Eulogica software includes a way for the Eulogica support team to connect onto your computer to provide support over the Internet. This is called EuRemote and can only run with the user's permission and connects to the Eulogica support servers, meaning it is a secure method of providing support.

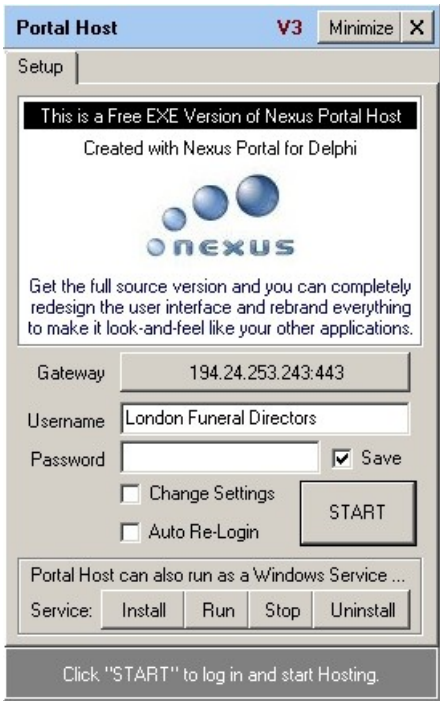
O.1 Starting Remote Support

To launch the remote support tool, within Eulogica go to the **Help** menu and select **Remote support**.

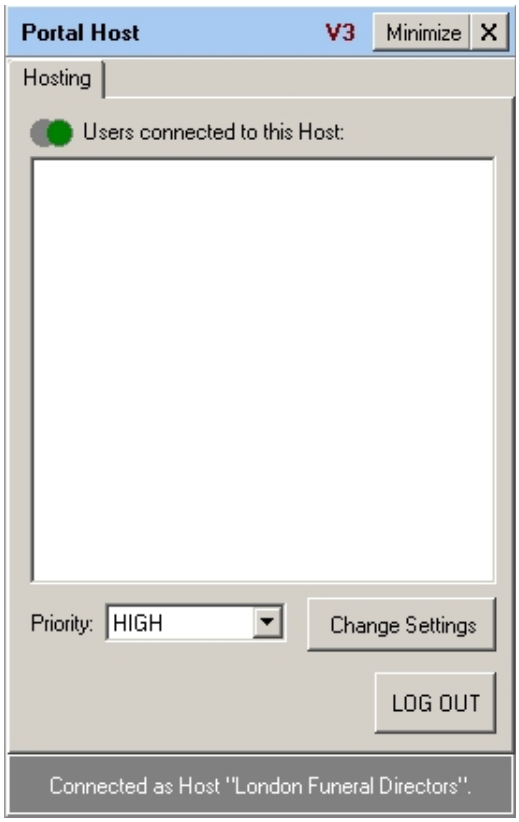
This will lead to a question asking if you wish to allow the remote support tool to run, shown below.

Press **OK** to launch the support tool, or **Cancel** to stop the process.

The remote tool will now open and you will presented with a screen as shown below.



Press the **Start** button and a member of the Eulogica support team will be able to connect to your computer. This will enable them to see your screen and use your computer as if they were sat at your computer with you. You will still be able to see what is happening on your screen. The screen shots below show the Remote Support tool before and after the Eulogica support staff has connected.



Support not connected to your computer.

Support is connected to your computer.

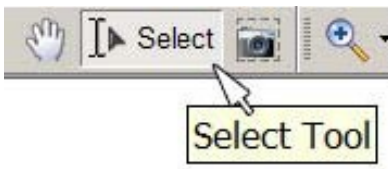
P Appendix

P.1 Extracting text from a PDF file

The emailing option in Eulogica creates a copy of the printed document in Portable Document Format and attaches this to the email. Adobe® PDF is the published specification used by standards bodies around the world for more secure, reliable electronic document distribution and exchange. PDF files look exactly like original documents and preserve the fonts, images, graphics, and layout of any source file — regardless of the application and platform used to create it. They can be shared, viewed and printed by anyone, on any system, using free Adobe Reader® software — regardless of the operating system, original application, or fonts. PDFs have full text search features for locating words, bookmarks, and data fields in documents, and Eulogica report content within a PDF file can be extracted and manipulated for use in other document formats.

There are 2 ways to extract content from a Eulogica report PDF:

A. To copy text from a PDF document, you must first change the pointer from the **Hand Tool** to the **Select Tool**. In the Acrobat Reader tool bar, the Hand Tool is selected by default. Click the Text Select Tool button on the tool bar. When the Text Select Tool is selected, the Hand-pointer is replaced by a standard text-editing I-beam pointer.



To select text in the PDF document, hold down the left mouse button and drag until the desired text is highlighted. Copy the selected text by:

- Clicking the ***right*** mouse button and selecting Copy
- By pressing Ctrl+C on the keyboard
- By clicking the Copy button on the Acrobat tool bar

The text of an entire PDF document may be selected by placing the I-beam anywhere within the PDF document and clicking the ***right*** mouse button and choosing the "Select All" option. It is not necessary to select text with the mouse prior to clicking Select All. When the desired text has been copied, open or return to the word processing application and paste the selected text by:

• Clicking the ***right*** mouse button and selecting Paste
• Pressing Ctrl+V
• Clicking the Paste tool bar button in the word processing application

Click the Hand Tool button on the Acrobat Reader tool bar to resume scrolling through the PDF document.

B. In Adobe Reader® 7.0, there is an option in the "File" menu to "Save As Text", which will create a file containing all the text from the PDF, formatted only in rough paragraphs.