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# Funeral Services Manager Configuration Guide

## Overview

These interfaces allow for configuration of lists throughout the application. Configuration of these lists will improve data entry speed and accuracy. Where appropriate lists are pre configured with sample data but can be modified to accommodate particular needs.

Creating and modifying the included templates is essential to producing printed materials quickly and accurately. You may want to utilize your logo or different fonts, colors etc. More about this can be found in the User Guide under the Manage Templates section of The User Guide.

## Administration

### Application

#### Preferences

Shared Folders sets the path for shared documents and templates.

Status Colors sets the colors and text used to indicate status of individual records.

### Company

#### Bank Accounts

Populates Account in the Disbursement and Register views.

#### Locations

Populates Location information in the Case view.

Name of Funeral Home is used to create forms, reports and documents and should reflect the name as it should appear.

The Code field allows you to differentiate between locations as well different case types i.e. Cases, Sales, Monument Orders etc.

#### Staff

Populates staff used in multiple views throughout the application. It includes the roles the staff members perform, access to the application and user permissions. Staff members may be entered without any permissions to use the application, for use in tracking roles and duties performed. Any staff member with a Username and Password will automatically have access to the Home Tab. Permissions for the Browse Tab and the Accounting Tab and Administrative privileges are all given by checking the appropriate boxes on the individual's Staff view.

## Miscellaneous

### Contract Terms

Populates Terms in the Contract Summary view.

### Education Levels

Populates Level in the Education view.

### Event Roles

Populates Role in the Family Car and Staff views.

### Marital Status

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Populates Status in Marital Status view.

## Register Transactions

Populates Type in the Register view.

## Relations

Populates Relation in the Survivor, Informant and Purchaser views.

## Service Times

Populates Time in the Events view.

## Titles

Populates Titles in multiple views.

## Progress

### Certified Copies

Populates Progress in the Charges view.

### Cremation

Populates Progress in the Cremation view.

### Funding

Populates Progress in the Funding view.

## Types

### Account

Populates Status in the Account view.

### Appointment

Populates Type in the Appointment view.

### Aftercare

Populates Type in the Aftercare view.

### Case/File

Populates Case or File types used in the Case view.

### Container

Populates Container in the Cremation view.

### Credit

Populates Type in the Credit view.

### Event

Populates Event Types in the Event view.

### Music

Populates Music Types in the Music view.

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## Place of Death

Populates Types of Places of Death in the Death view.

## Publishing

Populates Publishing Item Types in the Publishing view.

## Locations

### Clothing

Populates clothing storage locations in the Personal Effects view.

### Remains

Populates Remains locations in the Cremation view.

### Effects

Populates personal effects storage locations used in the Personal Effects view.

## Methods

### Disposition

Populates Disposition Types in the Method view.

### Filing

Populates Filing Status Types in the Funding view.

### Payment

Populates Payment Types in the Payment view.

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## The Directory

### People

#### Clergy

Populates the Officiant entry in the Events view.

#### Hairdressers

Populates the Hairdresser entry in the Hairdressing view.

#### Musicians

Populates the Artist entry in the Music view.

#### Physicians

Populates the Physician entry in the Vital Statistics view.

### Entities

#### Airlines

Populates the Airline Name entry in the Flight view.

#### Airports

Populates the Departure Airport entry in the Flight view.

#### Cemeteries

Populates the Location entry in the Events view and Cemetery entry in the Cemetery view.

#### Charities

Populates the Contributions entry in the Contributions view, through the From List button on the Home tab.

#### Medical Facilities

Populates the Place of Death entry in the Death view.

#### Florists

Populates the Florists entry in the Flowers view.

#### Funding Agencies

Populates the Company Name entry in the Funding view.

#### Funeral Homes

Populates the Name entry in the Other Funeral Home view.

#### Insurance Companies

Populates Name in the Insurance view.

#### ME Districts

Populates Examiner in the Method view.

#### Newspapers

Populates Media Name in the Publishing view.

#### Organizations

Populates Member Of in the Memberships view.

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## Religious Affiliation

Populates Religious Affiliation in the Memberships view.

## Service Places

Populates Location in the Event view.

## Vendors

Populates Vendor Name in the Merchandise Line Item view.

## Miscellaneous

### Music

Populates Title in the Music view.

### Zip Codes

Populates Zip in multiple views.