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Working with Cases and Files

Open an existing Case or File

1. On the Home tab, Click on either At-Need or Pre-Need in Open Group.
2. Double Click on the Case or File you wish to open.

Create an At-Need Case

Create a blank At-Need

1. On the Home tab, Click on At-Need in Open group.
2. On the Home tab, Click on New Record in New group.
3. Enter Name.
4. Click on Save.

Create an At-Need from a Pre-Need

1. On the Home tab, Click on At-Need in Open group.
2. Double-Click your At-Need case.
3. On the Home tab, click on Import Pre-Need, under the Tools group.
4. Double-Click on the Pre-Need file you wish to import.
5. Click on Import.

Add a Pre-Need to an existing At-Need

1. On the Home tab, Click on At-Need in Open group.
2. Double-Click the At-Need case you will be importing the Pre-Need into.
3. Under the Tools group, click on Import Pre-Need.
4. Double-Click on the Pre-Need file you wish to import.
5. Click on Import.

Create an At-Need from a Bundle

1. On the Home tab, Click on At-Need in Open group.
2. On the Home tab, Click on Import Bundle in the Tools group.
3. Double-Click on Bundle choice from menu on screen.
4. Click on Import.
5. Enter information for the case and save.

Add a bundle to an existing At-Need

1. On the Home tab, Click on At-Need in Open group.
2. Double-Click the At-Need case you want to add a bundle to.
3. On the Home tab, Click on Import Bundle in the Tools group.
4. Double-Click on Bundle choice from menu on screen.
5. Click on Import.

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Create a Pre-Need File

Create a blank Pre-Need

1. Click on Pre-Need from Open group on Home tab ribbon.
2. Click on New Record from New group on Home tab ribbon.
3. Enter Name.
4. Click on Save.

Create an Pre-Need from a Pre-Need

1. Click on Pre-Need from Open group on Home tab ribbon.
2. Double-Click your Pre-Need File.
3. Under the Tools group, click on Import Pre-Need.
4. Double-Click on the File you wish to import from.
5. Click on Import.
6. Re-enter Name information and Save.

Add a Pre-Need to an existing Pre-Need

1. Click on Pre-Need from Open group on Home tab ribbon.
2. Double-Click the Pre-Need File you will be importing into.
3. Under the Tools group, click on Import Pre-Need.
4. Double-Click on the File you wish to import from.
5. Click on Import.
6. Re-enter Name information and Save.

Create a Pre-Need from a Bundle

1. Click on Pre-Need from Open group on Home tab ribbon.
2. Under the Tools group, click on Import Bundle.
3. Double-Click on Bundle choice from menu on screen.
4. Click on Import.
5. Enter information for the case and save.

Add a bundle to an existing Pre-Need

1. Click on Pre-Need from Open group on Home tab ribbon.
2. Double-Click the Pre-Need File you want to add bundle to.
3. Under the Tools group, click on Import Bundle.
4. Double-Click on Bundle choice from menu on screen.
5. Click on Import.

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Add a New Record to a Case or File

You may add multiple records for the following Appointments, Survivors, Flights, Events, Pallbearers, Music, Family Cars, Staff, Professional Services, Merchandise, Cash Advances, Charges, Credits, Payments, Supplies, Funding, Insurance, Certified Copies, Disbursements, Orders, and Publishing.

1. On the Home tab, Click on At-Need or Pre-Need in Open group.
2. Double-Click your case or file.
3. On the left side listing, click on the item you want to create as a new record.
4. On the Home tab, Click on New Record in the new group.
5. Fill in the necessary fields for this record.

You may either choose to save this record or return and choose New Record to continue creating more records within this category, prompting you to save the New Record before creating the next. Additionally you may use the From List button to add Records to Contributions, Memberships, Music, Staff, Professional Services, Merchandise, Cash Advances, Supplies and Publishing.

Add to a Record from the From List button

1. On the Home tab, Click on At-Need or Pre-Need in Open group.
2. Double-Click your case or file.
3. Choose any item category from the listing: Contributions, Memberships, Music, Staff, Professional Services, Merchandise, Cash Advances, Supplies and Publishing.
4. Click on the From List button in the new group.
5. Choose your item from the list at the left by one of the following methods: double-click on item, click and drag item over to right side of screen or click on item and press Enter on keyboard.

Add a Document or PDF to a Case or File

You may add a new Document to the following views: Cremation, Contract Summary, Account, Payments, Disbursements, Publishing and Register. Please notice that any section that uses documents will have a panel in the lower right quadrant of your screen titled Documents. Payments, Disbursements, and Register require you to first create a new record or open an existing record in order to create a new document.

1. On the Home tab, Click on At-Need or Pre-Need in Open group.
2. Double-Click your case or file.
3. On the Task Panel, click on the item you want to create a new document for, if working with Payments Disbursements or Publishing either create or open an existing record.
4. Fill in any necessary fields for this record and save.
5. On the Home tab, Click on Document or PDF in the New Group.
6. Browse to the template.
7. The document will auto-populate any merge fields.

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Create an Account

When an account is created, it not only creates an account but also any Certified copy orders .

1. Create an Account.
2. On the Home tab, Click on At-Need in Open group.
3. Double-Click your case.
4. On the Home tab, Click on Create Account in Tools Group.
5. Choose Yes to create a new account and migrate contact.

Importing a bundle

1. On the Home tab, Click on At-Need in Open group.
2. On the Home tab, Click on Import Bundle in the Tools group.
3. Double-Click on Bundle choice from menu on screen.
4. Click on Import.

Importing a Pre-Need file

1. Click on Pre-Need from Open group on Home tab ribbon.
2. Click on New Record.
3. Under the Tools group, click on Import Bundle.
4. Double-Click on Bundle choice from menu on screen.
5. Click on Import.

Adding Calendar Items

Adding can be done by double-clicking on the icons for Events, Flights, Family Cars and Appointments in the upper right side of screen.

An Appointment can also be added by double-clicking in the Calendar itself, on a specific time. This is the default choice for the Calendar.

To block out a specific length of time on the Calendar, Click on the start time, hold down the left mouse button and drag the mouse down to the end time.

Now you may either click on an icon for Events, Flights, Family Cars and Appointments, or holding down the shift key, double click within the highlighted area to create an Appointment.

Editing Calendar Items

To edit a Calendar item, double click on item to open it, make your changes and save.

To set a date range, you may either use the calendar to the right, or Today, Tomorrow, or This Week buttons, in the Date Range group on the Browse tab.

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Working with Lists

Any view that consists of a List, such as At Need Cases, Pre Need Files, Certified Copies, etc. can be manipulated, sorted and filtered to locate data.

Adding

1. On the left side of the screen click in the sub-group item you wish to add.
2. Click on the Home tab on the ribbon.
3. Click on New Record, in the New group on the Home tab.
4. Fill out New Record and choose Save from the Actions group on the Home Tab.

Editing

1. On the left side of the screen click on the sub-group item you wish to edit.
2. From the listing on the right side of screen double-click on the record you wish to edit.
3. Make changes to the record and then click on Save.

Deleting

1. On the left side of the screen click on the sub-group item you wish to edit.
2. On the right side of the screen click once on the item you wish to delete and choose Delete from the Actions group on the Home tab.
3. You may also right click on the item you wish to delete and choose Delete from the drop down menu.

Sorting

All List views can be sorted using the heading at the top of each column. Click on the column and you will see a gray icon appear (either an up or down arrow). This allows you to sort A-Z, Z-A, or numerically, highest to lowest, lowest to highest.

Filtering

For more precise data retrieval there are multiple filter fields across the bottom of the page, where data can be entered in any or all columns to pull specific records.

An example would be as follows: You need to search At Need Cases in order to pull up prayer card information from the husband's funeral. If you know the last name, simply type it in the Decedent column, at the very bottom. You can then further refine your results by typing DOD (date of death), at the bottom of that column. Or if you know the Disposition of the case you can search by that term. Multiple filters can be utilized to pull up detailed data on any given case, file or list. An additional search tool is the % symbol, used as a wildcard; it is helpful when looking for data of which you have some information but not all. An example would be as follows: You need to search At Need cases for a decedent whose first name is Diane, but you have no last name. By inputting %Diane in the Decedent column, FSM will pull up all instances of Diane, as first, last or middle name in the database allowing you to search a few records instead of hundreds.

Applying Date Ranges

These pre-set filters can be used to generate date specific reports in any List view, for any necessary purpose. There are seven pre-set filters available to sort data by dates:

1. Today – pulls in data for current day.
2. Tomorrow – pulls in data for tomorrow.

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3. This Week – pulls in data for this week.
4. Last Month – pulls in data for last month.
5. This Month – pulls in data for current month.
6. This Quarter – pulls in data for current quarter.
7. This Year – pulls in data for this year.
8. Custom Range – Specify begin and end.
9. Clear Range – Clears range.

Send To

The Send To section of the Browse Tab gives you multiple choices for the output of program information.

1. Print – Creates a standard Report and outputs to your choice of printer.
2. Chart – Applies to items on Tracking Button only - Creates a chart from data of your choice.
3. Excel – Creates a spreadsheet in Excel with data from current open document
4. Outlook – Program creates a PDF file, creates a new Outlook message and attaches PDF file to message.
5. Merge – Applies to items on the People Button only – Creates a Mail Merge with letters, envelopes, etc.
6. PDF – Creates a report in PDF format.
7. Report – Creates a Report in a standard format, if there are extended formats for the section you will be presented with a selection menu.

Working With Documents

The following are the views where you may create documents and the template examples available. Please note that these sections can be found throughout the application and provide a Documents storage area in the lower right quadrant of your screen view. These documents are specific to the case you are working in.

Account - Statements, Letters, and Envelopes

Contract - Contracts, Proposals and Statements

Cremation - Cremation Authorization, Cremation Certificate, and Cremation Envelopes

Disbursements - Checks

Payment - Receipt

Publishing - This view is one where you will be able to access the multiple folders of templates, specific to federal, state and funeral home needs.

Register – Checks

Creating Documents or PDF's

Create a New Document

1. Open your case or file.
2. Navigate to a view that will allow document/PDF creation.
3. Right-Click in the white area below any files in the Documents storage box.
4. Choose New and then Word Document.
5. A new file is created and you will be prompted to name it.
6. After naming your new file, double click to open it in Word and begin creating your document.

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Create a New Document or PDF from Template

1. Open your case or file.
2. Navigate to a view that will allow document/PDF creation.
3. Click on the Document or PDF Button in the New group.
4. Choose the template from the list.
5. A new file is created and opens for editing.

Edit an existing Document

1. Open your case or file.
2. Navigate to the view where your document is stored.
3. Double-Click on the Document you want to edit.
4. Make any edits or changes to the document.

Add Your Existing Document to a Case or File

You may want to do this for scanned documents pertinent to your case or file, such as military paperwork, birth or marriage certificates and photos.

1. Locate your existing document on your computer and copy it.
2. In Funeral Services Manager, click on the At-Need or Pre-Need Button, in the Open Group.
3. Double-Click to open the Case or File
4. Navigate to the view where you would like your document to be stored.
5. Right-Click in the white area below any files in the Documents storage box and choose paste.
6. Double click to open your document.

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Working With Merges

Creating Merges

Merges, unlike Documents are not specific to a case unless they are created within a case. The following are the views where you may create merges and the template examples.

Accounts Receivable - Statements, Letters, and Envelopes.

People - Letter, Envelope and Letter/Envelope combination.

Create a New Merge

1. Navigate to the Browse Tab for People or the Accounting Tab for Accounts Receivable.
2. Choose from the drop down lists on either button, i.e. Informants on People Button.
3. At this point you want to apply any filters and sorting.
4. Choose the Merge Button from the Send To Group.
5. Choose the Template you need from the dialog box.

Create a Merge from a Template

1. Navigate to the Browse Tab for People or the Accounting Tab for Accounts Receivable.
2. Choose from the drop down lists on either button, i.e. Informants on People Button.
3. Choose the Merge Button from the Send To Group.
4. Choose the Template you need from the dialog box.

Create a Merge from a Blank Template

1. Navigate to the Browse Tab for People or the Accounting Tab for Accounts Receivable.
2. Choose from the drop down lists on either button, i.e. Informants on People Button.
3. Choose the Merge Button from the Send To Group.
4. Choose the Template labeled Blank from the dialog box.
5. Add Merge Fields as needed from the Mailings Tab.

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The Office Button

Login

1. Click Login to open the Login screen.
2. Enter Username and Password.
3. Click Login button to log into Funeral Services Manager.

Logout

1. Click on Logout to log out of Funeral Services Manager.
2. From here you may leave the program running and available for login.
3. Click on the Office Button and choose Exit to close the program.

Change Password

1. Click to open the Change Password screen.
2. You will be prompted for your current Password, enter here.
3. You will be prompted for your new Password, enter here and then again to verify.
4. Choose Change to complete the process.

Activate

1. Click to open the Activate screen.
2. You will be prompted for the Product Key, enter here.
3. Click Activate.

Connect

1. Click to open the Connect screen.
2. You will be prompted for Server Connection information.
3. You will need the Server IP Address and instance name(if necessary).
4. You will need the Database name.
5. You will need the Username and Password for the Server (You may need your Systems Administrator to set this up for you).
6. Once the information is filled in click Connect to complete the connection process.

Update

Click here to check for software updates. If an update is available, you will be prompted to update your software. Follow any onscreen commands to update.

Administration

This will only be enabled if a user has administrative access. This allows preferences and lists to be set up for your specific company. Full information is available in The Administration section of this document

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The Office Button

Manage Templates

On the Office Button, this is a button that allows you to access, create and manage templates. Templates allow you to create any documents that you may need to run your business such as, but not limited to: statements, letters, bills, receipts and forms. Templates are customized through a Merge function, which allows information from the database to merge data into the template that pertains to a specific case or file. Please note that when creating a template; if you do not immediately choose a folder, a dialog box with choices will appear: Account, Accounts Receivable, Contact, Cremation, Disbursement, Payment, People, Publishing or Register. Choose one of these according to your need. This will create a document in the specific folder and make necessary merge fields available to you.

Edit an existing Template

5. Click on the Office Button.
6. Click on the Manage Templates Button.
7. Choose the folder that your template is stored in, i.e. Account, Accounts Receivable, Contact, Cremation, Disbursement, Payment, People, Publishing or Register.
8. Double click on the document you wish to edit.
9. Make any edits or changes to the document which do not require merge fields.
10. In order to add Merge Fields, you must go to the Mailings Tab and choose Insert Merge Field to place fields as needed in your document.

Create a New Template

6. Click on the Office Button.
7. Click on the Manage Templates Button.
8. Choose the folder in which you will store your template, i.e. Account, Accounts Receivable, Contact, Cremation, Disbursement, Payment, People, Publishing or Register.
9. In the white area below any files, right click and choose New and then Word Document.
10. A new file is created and you will be prompted to name it.
11. After naming your new file, double click to open it in Word and begin creating your template.
12. In order to add Merge Fields, you must go to the Mailings Tab and choose Insert Merge Field to place fields as needed in your document.

Create a Template from your Document

1. Locate your existing document on your computer and copy it.
2. In Funeral Services Manager, click on the Office Button.
3. Click on the Manage Templates Button.
4. Choose the folder that your template is stored in, i.e. Account, Accounts Receivable, Contact, Cremation, Disbursement, Payment, People, Publishing or Register.
5. In the white area below any files, right click and choose paste.
6. Double click to open your document in Word.
7. As with Creating a New Template you must go to the Mailings tab and choose Insert Merge Field to place fields as needed in your document.
8. When finished, save your document and it will be automatically saved into the correct folder.

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About

Here you will find information about your version of Funeral Services Manager, including your status and copyright info. Choose Alt + C to close screen.

The Home Tab

Actions

Save

Saves current work to case or file.

Refresh

Refreshes view and info for application.

Save & Close

Saves current work and closes view.

Delete

Deletes current view, record or document.

Open

At-Need

Opens a list of At-Need cases.

Pre-Need

Opens a list of Pre-Need files View.

Calendar

Opens a calendar view of the day's events, appointments etc., can also view by week, month or custom range.

Control Center

Opens to allow you to see your entire case at-a-glance.

New

New Record

Create a New record.

From List

Create a New record from a list.

Document

Create a new Document in the following views: Cremation, Contract Summary, Account, Payments, Disbursements, Publishing and Register.

PDF

Create a new PDF in the following views: Cremation, Contract Summary, Account, Payments, Disbursements, Publishing and Register.

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Tools

Create Account

Create an account for the current case or file.

Import bundle

Import specific bundled pricing to the current case or file.

Import Pre-Need

Import Pre-Need file information to the current case or file.

Clipboard

Cut

Cut text from records or documents.

Copy

Copy text in records or documents.

Paste

Paste text cut or copied from records or documents.

Text

The Text group allows you to utilize Rich Text Formatting within any Notes section of a record. Rich Text Formatting includes changing the Font type, size and style, alignment, line spacing, spelling and list numbering.

The Browse Tab

Category

The Directory Button

Please see the configuration Section of this document.

The Calendar Button

The Calendar Button allows you to see at a glance, appointments, services, cars and flights that are scheduled on any day or range of days. It is a split button which gives you a grid view by clicking on the top portion and a list view by clicking on the bottom portion.

In the grid view, you have the ability to see the current day at a glance or you can choose what you want to view from the monthly calendars to your right. The monthly calendar can be used to choose date ranges by clicking your mouse on the start day and dragging it across and down to include the range you want. The Calendar will highlight those days and display in grid view to your left. The Calendar then defaults to this view the next time you open the screen.

In order to return to a single day format, you will need to click on the Today button in the Date Range group on the Browse Tab. You will notice that Tomorrow and This Week are also available as choices for the Calendar.

The bottom portion of the split button gives you a list of what is available to add to the Calendar view.

1. Appointments – This sets up an Appointment in the Calendar and can be created in or out of a case or file.
2. Events – This sets up an Event in the Calendar, created only within a case or file.
3. Family Cars – This sets up Family Cars in the Calendar, created only within a case or file.

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4. Flights – This sets up a Flight in the Calendar, created only within a case or file.

The Inventory Button

The top portion of the split button gives you the Inventory Summary. This is a listing of all Merchandise Items that are marked Stocked. It is a way to keep track of items you frequently order, if desired. These items may or may not be associated with a case.

The bottom portion of the split button gives you a drop-down menu with two choices:

Inventory Expended – This is a listing of all Merchandise Items that have been used. They may or may not be associated with a case.

Inventory Ordered – This is a listing of all Merchandise Items that have been ordered. They may or may not be associated with a case.

Stocked Merchandise Items

In order to have a Merchandise Item show on the Inventory Summary, you must first set it up by checking the Inventory box when it is created. To do this, you must have rights to the Accounting Tab.

Choose Itemized Pricing under Tools Group and then choose your Item from the Merchandise List to the left. You may either create a new Merchandise Item from List or double-click to open an existing Item. When you have the item screen open, simply check the Inventory box located to the right of Product at the top of the entry. In order to remove any Merchandise Item from the Inventory uncheck the Inventory box.

The People Button

The top portion of the split button gives you a list of all People associated with any case or file. The bottom portion of the split button gives you six specific lists of People, which are as follows:

1. Informants – A listing of Informants for each case or file.
2. Officiants – A listing of Officiants for each case or file.
3. Pallbearers – A listing of Pallbearers for each case or file.
4. Physicians – A listing of Physicians for each case or file.
5. Purchasers – A listing of Purchasers for each case or file.
6. Survivors – A listing of Survivors for each case or file.

The Tracking Button

The Tracking Button provides a drop-down menu that gives you the ability to track various data pertaining to specific cases. The different lists available are as follows:

1. Cremations – Allows you to track progress of cremations on each case.
2. Certified Copies – Allows you to track progress of certified copy orders.
3. Disbursements – Allows you to track cash advances paid for each case.
4. Escorts – Allows you to track status and confirmation of escorts on each case.
5. Grave Opening – Allows you to track status and confirmation of grave opening on each case.
6. Publishing – Allows you to track status and type of published goods on each case.
7. Special Details – Allows you to view all cases with Special Details –Instructions for Staff.

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The Accounting Tab

Tools Group

The first section on the Accounting tab, Tools is made up of four sub-groups; Itemized Pricing, Bundled Pricing, Finance Charges and Register. It is used for creating records that will be continually used in cases or files. Items are listed here in an alphabetical directory format for fast information retrieval. Simply create the record once and it will be usable in any case or file you create. The process for Adding, Editing and Deleting is the same throughout the Tools group on the Accounting Tab.

Itemized Pricing

These are items that you frequently use to create contracts. Itemized Pricing contains General Pricing and Merchandise Pricing.

General

1. Cash Advances
2. Professional Services
3. Property
4. Supplies

Merchandise

1. Caskets
2. Clothing
3. Miscellaneous
4. Monuments
5. Printing
6. Urns
7. Vaults

Bundled Pricing

Bundled Pricing contains services, merchandise and cash advances bundled together in a pre- made package. Combine services, merchandise and cash advances into saved bundles, which can be imported into cases or files. Double click to open created bundles or go to the Home Tab to create a new bundle using New Record.

Bundled Pricing consists of four sections:

1. Summary – Name and information pertaining to bundle.
2. Professional Services – Professional Services used in bundle.
3. Merchandise – Merchandise used in bundle.
4. Cash Advances – Cash Advances needed in bundle.

Finance Charges

Apply Finance Charges to accounts. Finance charge parameters must be set up in the Account view in order for Finance Charges to be applied.

Register

Register contains the working bank register for cash advances, disbursements and payments tracking. This is a working check/disbursement/deposit register for accounting purposes, allowing you to keep careful track of your disbursement accounts.

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Reporting Group

The second group on the Accounting Tab, Reporting, is made up of the Pre Need, At Need and Accounts sub-groups. It is used for pulling summary reports or specific queries by using the search fields at the bottom of the view screen.

Pre Need

The Pre Need Button is a two part button; the top portion is a Summary Report. The bottom portion is a listing of four specific queries that will assist you in tracking costs, ordering and insurance funding. The Pre Need sub-group consists of five sections:

Summary – A list of all files, searchable by field and exportable to other file formats.

Services – A list of all Services only items, searchable by field and exportable to other file formats.

Merchandise – A list of all Merchandise only items, searchable by field and exportable to other file formats.

Cash Advances – A list of all Cash Advance items, searchable by field and exportable to other file formats.

Funding – A list of all files that utilize Funding and the status of applications, payments and cancellations.

At Need

The At Need Button is a two part button; the top portion is a Summary Report. The bottom portion is a listing of four specific queries that will assist you in tracking costs, ordering and insurance funding. The At Need sub-group consists of five sections:

Summary – A list of all cases, searchable by field and exportable to other file formats.

Services – A list of all Services only items, searchable by field and exportable to other file formats.

Merchandise – A list of all Merchandise only items, searchable by field and exportable to other file formats.

Cash Advances – A list of all Cash Advance items, searchable by field and exportable to other file formats.

Funding – A list of all files that utilize Funding and the status of applications, payments and cancellations.

Accounts

The Accounts Button is a two part button; the top portion is a Summary Report. The bottom portion is a listing of three specific queries that will assist you in tracking balances, charges and payments. The Accounts sub-group consists of four reports:

Summary – A list of all Accounts, searchable by field and exportable to other file formats.

Accounts Receivable – A List of all Accounts with balances due exportable to other file formats.

Funding Receivables – A list of all Accounts that utilize Pre Funding

Transactions - A list of all Transactions, Payments, Charges and Credits.