



USERS' GUIDE

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1 Introduction



From Association Computer Services, Inc., comes The Professional Programs, the complete solution for funeral homes of all sizes. Whether you handle 25 calls a year or 25 hundred, The Professional Programs reduce your paperwork, simplify your bookkeeping, and let you concentrate on delivering professional quality service.

As an introduction to our programs, we have provided tutorials which walk you through Printing Your First Prayer Card, Printing Your First Government Form, and Entering Your Prices.

The Professional Programs consist of modules that may be purchased separately. A single main menu leads to all of the modules.

Arranger Professional consists of three modules which may be purchased separately or together.

LedgerPRO is the electronic funeral ledger. It prepares all of the government forms including death certificates, burial permits, Veterans Administration claims and Social Security statements. Standard obituaries, clergy cards, and funeral ledgers as well as basic non-financial reports are also included.

A/R PRO is the accounts receivable module. It prepares at-need contracts, memoranda, and statements as well as financial reports.

P/N PRO is the preneed module. It prepares preneed contracts, and records and reports trust and insurance funding.

PrintPRO prepares memorial folders, prayer cards, acknowledgement cards, and register books. PrintPRO looks and works like LedgerPRO up until the point of printing when a different set of selections is presented.

The Main Menu also includes buttons across the bottom for Utilities, Registration, Introduction, and Close. Utilities are maintenance routines. When you purchase a module you will register it. Unregistered modules are available to you in demonstration mode so you may determine if you wish to purchase them. Clicking on Introduction brings up this page. Close exits the program.

ArrangerPro and PrintPro maintain one common set of data. If you own more than one module, you can enter the data in any module and, where appropriate, it will be there when you look up the same funeral in the other module. Of course, there are some differences between the data entry windows. For example, LedgerPro has medical information for the death certificates that is unnecessary in PrintPro. Speaking of unnecessary information, we can not repeat too often that software is a tool to prepare your paperwork and maintain your history; if the windows collect information that is unnecessary for your purposes, don't enter it.

ACS has long been a leader in funeral home software solutions. We began working with funeral directors in 1984 and incorporated ACS in 1986. For years we have been dealing with real people who use our products every day. We are proud to introduce the latest generation of our products.

2 Getting Started

2.1 Installing the Program

The Professional Programs are distributed on a CD-ROM. On many computers placing a CD in your drive is all you need to do to cause your computer to read the CD. So place the CD in your drive and wait a few moments to see if a menu appears on your screen. If nothing happens, you can make the menu appear by first double clicking on My Computer to display icons for your drives and then double clicking on the icon for your CD-ROM drive which will be identified by a picture of a CD.



The first option on the menu is Install. Click on this choice to begin the installation process. The menu contains options to display this documentation in on-screen and printable versions. The menu also contains a Release Notes choice which allows users installing an upgrade to see what has changed, and a Prior Versions choice for our existing customers wishing to reinstall their present version.

Once the installation begins, you will be able to change the directory into which the program will be installed. Unless you are an advanced user or on a network, we recommend you simply accept the normal location which is C:\Program Files\ACS. If you choose to install to a non-standard directory, you will have to remember to install every update to the same location. The installation will place an icon on your desktop which you will use to enter the program.

Because Windows Vista does not allow data files to be in the Program Files tree, the first time you start the program it will create a folder for the data. The default location of that folder is C:\ACS\Data folder although you can change this if you are on a network or if your computer has a drive other than C: for data.

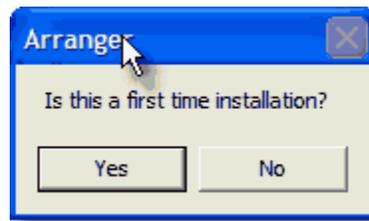
Network users may wish to install the program onto their server instead of accepting the normal location which would be onto the computer in which they inserted the CD. If the installation was on a shared drive, the program will work from the workstation which was used to make the installation without doing more. However, if you also wish to use other workstations, you will need to install the program to the shared drive from each workstation in order to install the Borland Database Engine (BDE) on the local drive. If you do not share the entire drive, do not allow the program to install to

\Program Files\ACS on the server. Instead install to \ACS (or to an ACS folder within a shared folder) and then mark the ACS folder as shareable with full access. You may then map a drive on each workstation to that folder, and then install the program from the workstation to the root folder of the mapped drive. When the program creates its data folder, be sure it creates it underneath the ACS folder you will be sharing.

You may also choose to install the software to the local drive of each workstation as well as to the shared drive, but then you must configure each workstation to find the data on the server. We recommend the first approach, installing the software from each workstation but always changing the place of installation from C: to the shared drive, except on Wide Area Networks where performance considerations may require multiple local copies of the software. Note, that simultaneous access to a single data set from multiple computers requires multi-user registration at extra cost.

2.1.1 Data Directory

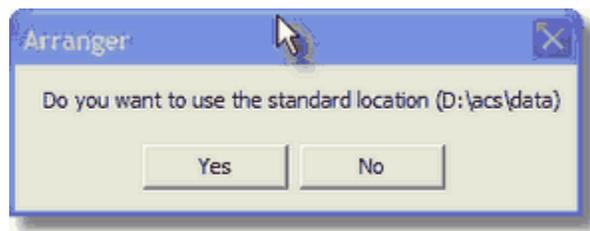
When you start the program for the very first time, it will realize that it does not know where to find its data. It will ask you to confirm that this is a first time installation.



Since it is, you will click on Yes. If a problem causes this message to display when this is not your first time installation, click on No and this message will appear.

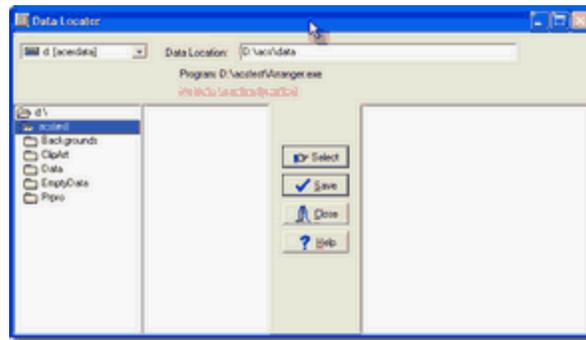


Usually rebooting with correct this problem. If not, click OK, close the program, restart it, answer Yes to the is this a first time installation question and proceed as if that were the case. Answering Yes will cause this message to appear.



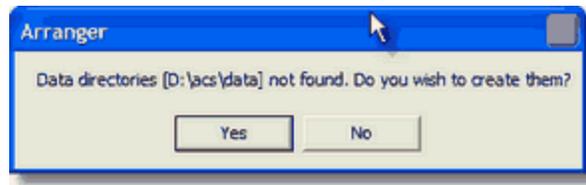
By default, the data location will be in a folder called \ACS\Data on the drive on which the program is installed. We recommend you accept this location unless you have a strong reason not to do so. The most common reason to make another selection would be that you are installing on a network and the data will be located on another computer. Another good reason would be if your computer is setup with a C: drive for programs and a D: drive for data or if you are putting the data on a shared external drive.

If you do decide to specify a custom location, the following window will appear.



Use the controls at the left to locate the drive and directory in which the data will be stored. Once the proper directory is highlighted, click on Select to specify that directory (if the directory does not yet exist, you may type it in the Data Location field at the top of the window), Save to store your selection, and then Close to close the Data Locator.

If the selected directory does not yet exist, which would be normal in a first time installation particularly if you chose to use the standard location, this message will appear.



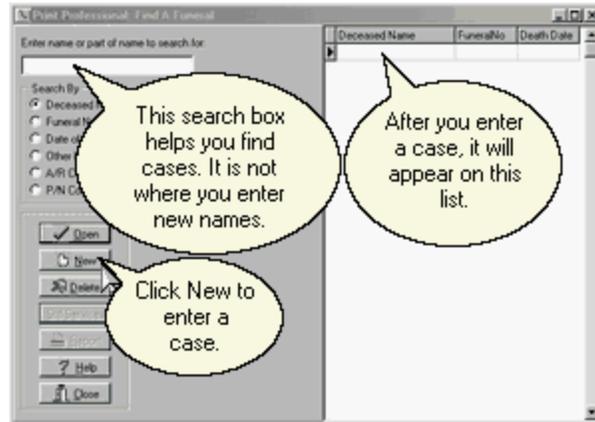
Click on Yes and the program will create the appropriate files in the selected location. If you realize that you have not specified the proper location, click on No.

2.2 Printing Your First Prayer Card

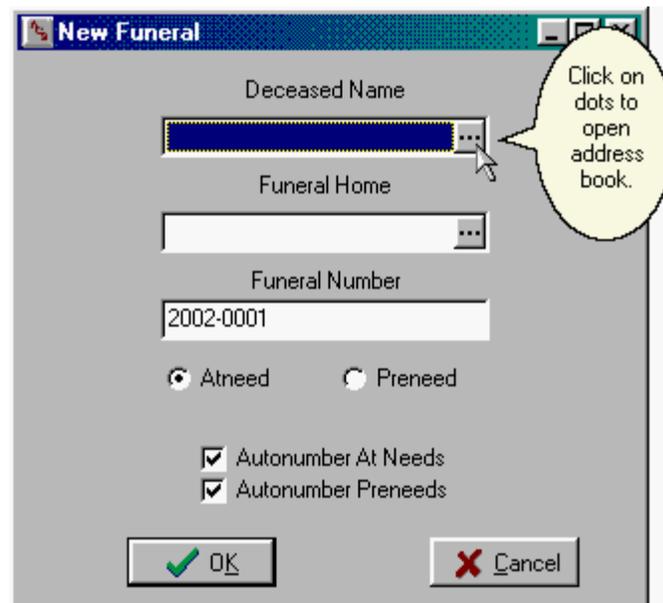
Double click on the Arranger icon on your desktop to bring up the program's Main Menu.



Click on the Print Pro button or press the P key to bring up the Find a Case Screen. Hitting the P key works because the P on the Print Pro button was underlined. Underlined characters on buttons mean that hitting that letter (or alt and that letter if you are in a place where hitting a letter would be interpreted as data) operate the button.



This is the Find a Case Screen. If you are just starting out you will not have any cases listed to Open yet, and so you should click on New to enter your first case.

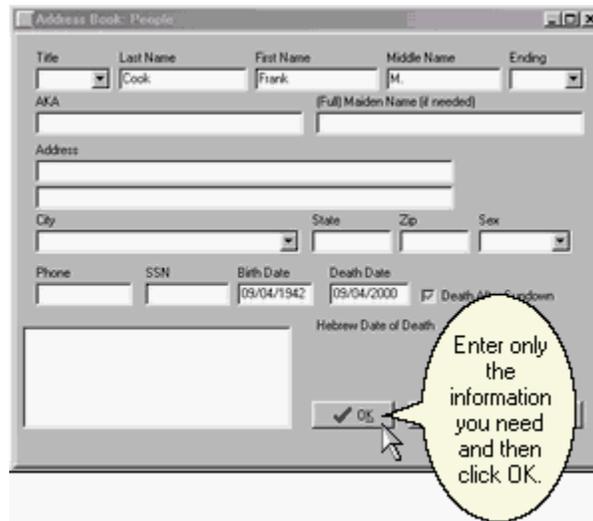


The first two fields have an ellipsis (three dots) at the right which tells you that they call for a Name or Place. Click on the ellipsis to bring up the Address Book.

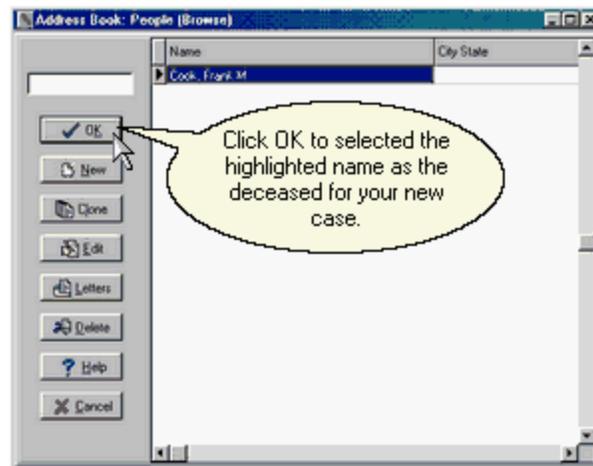


This is the Address Book where you look up people you have dealt with in prior cases. If you are just starting out, this will also be empty and you'll want to click on New again. However, if you had been using the program for a while, the person who is now deceased might have already been in your system as a relative in an earlier call, so you'd want to check your Address Book for the name before hitting New and creating a possible duplicate.

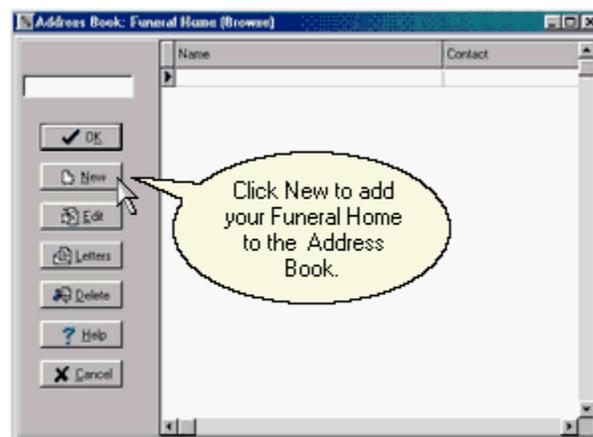
This is the screen for entering information about a person. Since our object is to do a Prayer Card, all we need to fill in is the name and the dates of birth and death. This screen is discussed in greater detail elsewhere.



When you have the information entered to your satisfaction, click on OK.



This took you back to the Address Book but now the person you entered is on the list. Click OK again to indicate that you wish to create a new case with that person as the deceased. The New Funeral Screen may appear briefly depending upon the speed of your computer, and then the program will automatically open the Address Book for you to specify the Funeral Home.



We have returned to the Address Book, but unlike before when we were shown People, this time we are shown Places. If this is our first time using this list, it will be empty and we need to click on New to enter our first Place.

Address Book: Funeral Home (Edit)

Name * Needed for registration

Contact

Address Code Register Unregister Print

City

Phone Fax Extra Information

License Location No.

OK Cancel Help Notes

Enter the information for your funeral home. Ignore the boxes about Registration. We will help you fill in those boxes after you decide to purchase the program. When you enter the phone numbers if you start with a (to enclose an area code), the program will enter the rest of the punctuation for you.

Address Book: Funeral Home (Edit)

Name * Needed for registration

Contact

Address Registration Code Register Unregister Print

City State Zip

Phone Fax Extra Information

License Location No.

OK Cancel Help Notes

Click on OK to save this information and return to the Address Book.

Address Book: Funeral Home (Browse)

Name	Contact
My Funeral Home	

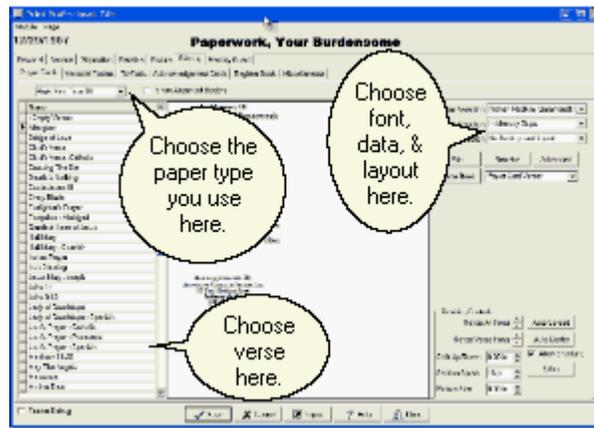
OK New Edit Letters Delete Help Cancel

Then click on OK again to use this location for your case.

The program has automatically entered a Funeral Number which you might want to change, but since we're just printing Prayer Cards we'll leave the number alone and click on OK. If you want to tell the program not to automatically number your cases, remove the check marks first.

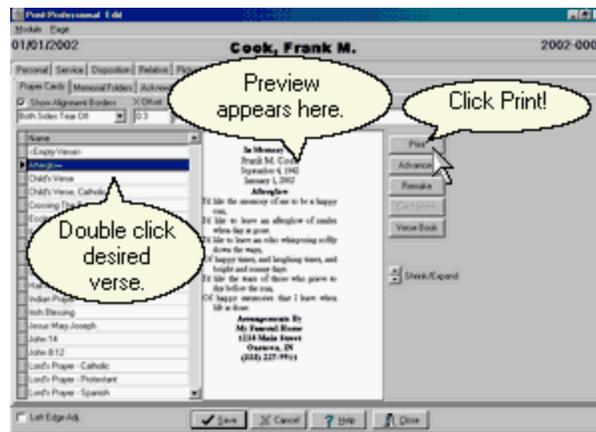
This opens our case and places us on the Personal Tab. At this point you may wish to click on the square box symbol in the upper right hand corner of the window to maximize the window. On many monitors, this window looks better maximized.

If we were printing Memorial Folders, Acknowledgements, Register Books, or Miscellaneous forms, we'd need to click on the intervening tabs to enter more data. However, since our object is to print a Prayer Card and we've already entered a name with dates of birth and death and a funeral home location, we can simply click on the Printing tab at the right end of the list of tabs.

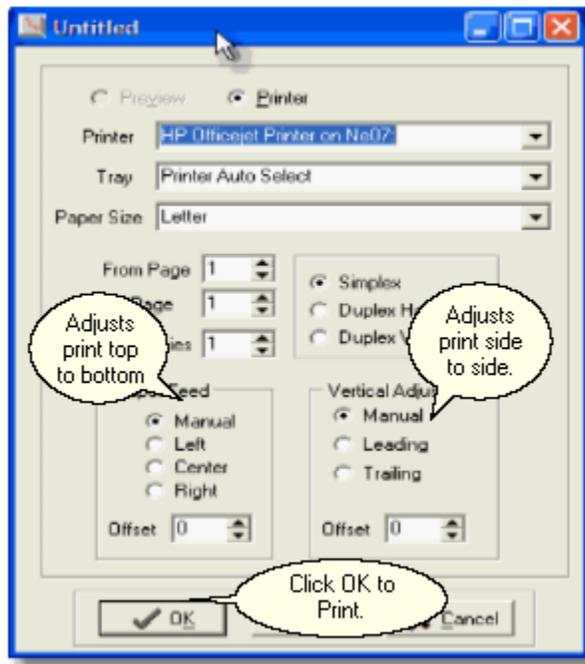


Several items on this screen have been set to standard values by default. Once you start using the program these values will be reset to reflect your most recent choices. You should see a list of verses on the left with the arrow indicating that the initial choice is "<Empty Verse>". Immediately above that is the paper size selection box which is initially set to "Both Sides Tear Off". This choice is for 8-up prayer cards on an 11" sheet of paper with a tear off strip on each side. Clicking the arrow to the right of this choice brings up a list with other choices. Further to the right you will see a selection for fonts which should be initially set to "Roman Small(Garamond)" and a selection for data which should be set to "Basic.pc". Later you'll want to experiment with other fonts and data choices; however, for now please accept the initial settings unless for some reason any of these boxes start out blank in your version. In that case, you will want to click on the arrow to the right of the blank selection and choose something, preferably our standard choice.

Double click on Afterglow in the verse list.



The card on the right will remake itself with the Afterglow verse. Now click on Print.



The Report Setup screen appears with your default printer selected and Copies set to 1. If you have more than one printer and need to change from the selected printer, you could click on Setup; otherwise simply click on OK to print your first sheet of cards. You would also use Setup to specify manual feed if your prayer cards are not in the paper tray. If you have not yet purchased the program, a message may appear warning you that the chosen funeral home location is unregistered. Do not be concerned about this message. It simply means that Sample will be printed on your output until we issue you a registration number on purchase. Click on OK in this warning.

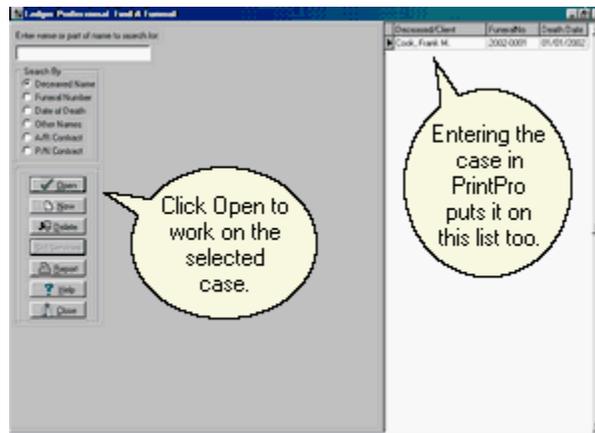
Finally, click on Close and Close again to return to the programs Main Menu, or click on Close a third time to return all the way to your desktop.

2.3 Printing Your First Government Form

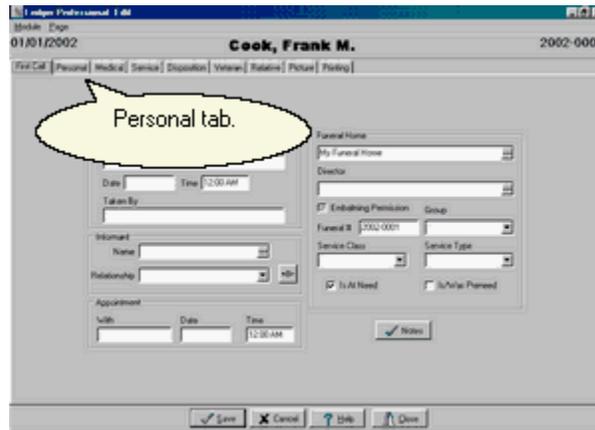
If you have just finished Printing Your First Prayer Card, you should be at the Main Menu. If not, Double click on the Arranger icon on your desktop to bring it up.



Click on the Ledger Pro button or press the L key to bring up the Find a Case Screen.



This time your list of cases should not be empty. The case you entered into PrintPro when you Printed Your First Prayer Card will already be on the list. Click on Open to use that case. If you skipped the section on Printing Prayer Cards, you will want to review the instructions in that section on entering your first case.



Again, you will want to be sure this window is maximized by clicking on the square box in the upper right hand corner. If the square box has been replaced by two boxes, your screen is already maximized.

We are going to print a Social Security Form (SS721), and so our first task will be to enter the necessary data that we skipped when we entered the case to print a prayer card. Click on the Personal tab to bring up that page.



Next click on the ellipsis (3 dots) to the right of the deceased's name. When the person screen

appears, go to the Sex field and specify Male or Female and to the SSN field to add in the Social Security Number.

Then, click on OK to return to the Personal tab. Now click on Relative.

A panel for the first relative is already there, and so you should click on the three dots in the name field to open the address book. Relatives whose names go on government forms must be in the address book. To create a panel for a second relative, click on New. You could also click on w/o Addr Book to add a relative without using the Address Book, but that is only recommended in situations where you are sure you will never need to use the name again or to add a reference that isn't a name such as "three grandchildren."

Our deceased is on the list, but now we need to click on New to add our Spouse. When the screen

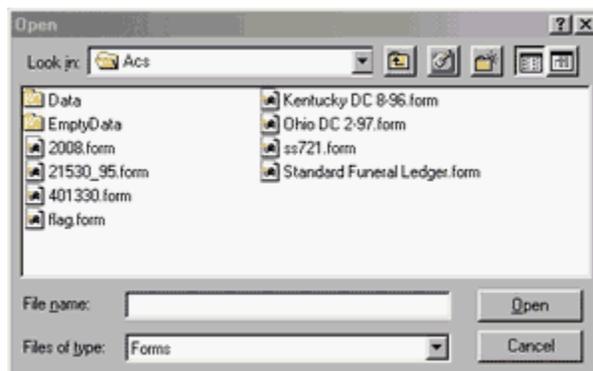
appears, add the necessary information. Then, click **OK** to return to the Address Book, then click **OK** again to return to the Relatives tab and in the field below the name type in Husband or Wife as appropriate. This relationship field is a List that starts out empty but builds as you use the program.



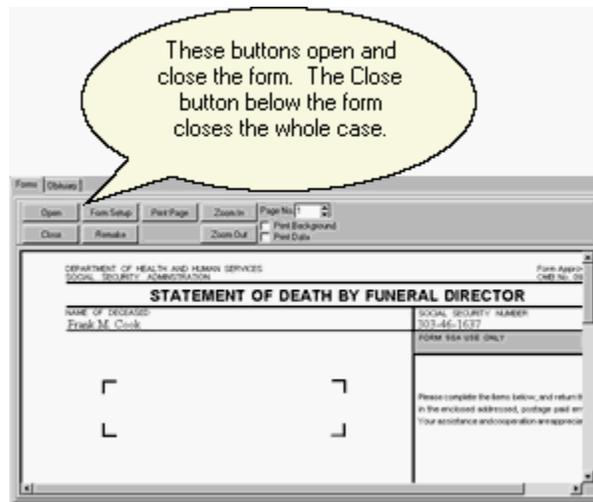
That's all the data we need for this form so click on the Printing tab.



Since this is our first form, the list of Installed forms is empty and we need to click on Install.



Find **ss721.form** in the list of available forms, click on it to highlight it and then click on **Open**. If you have not yet purchased the program, a message may appear warning you that the module or funeral home location is unregistered. Do not be concerned about this message. It simply means that Sample will be printed on your output until we issue you a registration number on purchase. Click on **OK** in this warning. The on-screen form will appear.



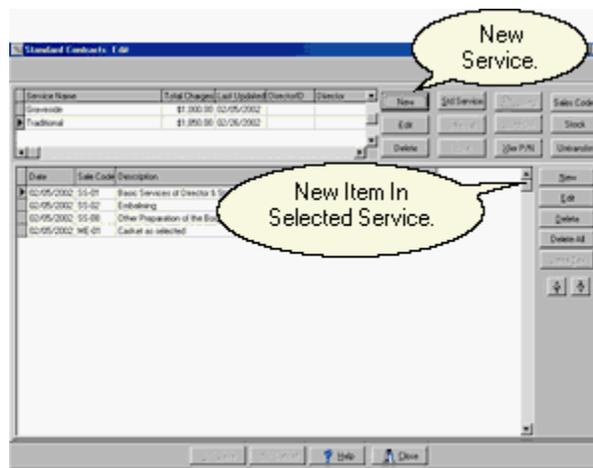
Scroll the form to satisfy yourself that it is filled in the way you want it to be. To print the form to paper, click on Print Page. When you are done, click on Close Document. You will return to the form list but now the SS721 will be on the list. The next time you wish to print a Social Security Form it will not be necessary to Install the form. After you have installed your forms, you will Select the particular form you wish to print from the list.

2.4 Entering Your Prices

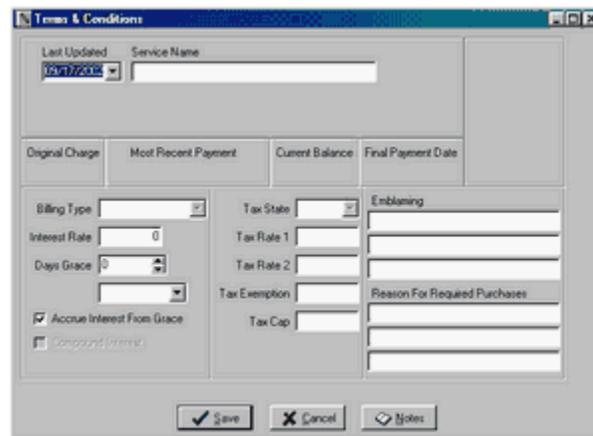
We highly recommend entering Standard Services as soon as possible. Each Standard Service is a list of items that may be copied into a contract. Standard Services are entered by selecting Std Services from the Find a Funeral Screen in A/R PRO or P/N PRO. The same Standard Services are available for you use in both at-need and preneed contracts.



Selecting this option brings up the Standard Services Editor.



The Editor looks very much like the Contract List although some buttons have been disabled. To enter a Standard Service click on New.



Enter a Service Name and Click on Save. Typical names for Standard Services are Traditional, Cremation, Graveside, Catholic, and Ship-Out. Any combination of items that you typically offer as a group is a candidate for a Standard Service. You should ignore the interest, sales tax, and disclosure fields as the program does not take this information from Standard Services.

Use the New Button at the right to add transactions to your service.

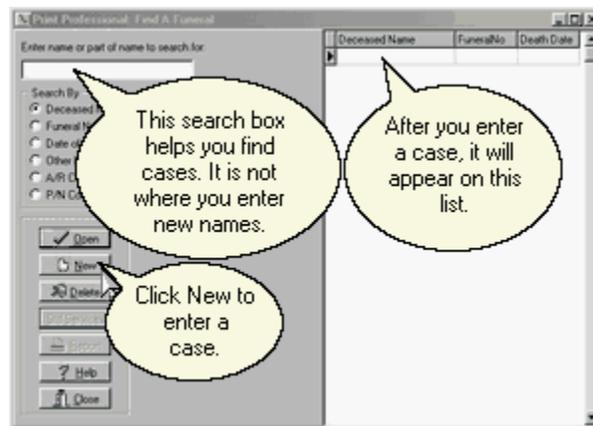
Notice that the Standard Services page has a Standard Services button at the top of it. You may use this feature to copy one Standard Service into another one.

3 Data Entry Basics

3.1 Navigation

3.1.1 Find a Funeral

The Find a Funeral Window is substantially identical in all modules. The column headings vary slightly and some buttons are not available in every module, but the main functions are the same.



From this window you may click on Open to Open an Existing Funeral, New to Create a New Funeral, or Delete to Delete an Existing Funeral. Clicking on Help opens this help window, and Close returns you to the Main Menu.

Reports are available in LedgerPRO, A/R PRO, and P/N PRO. Standard Services are only applicable to A/R PRO and P/N PRO.

3.1.2 Open a Funeral

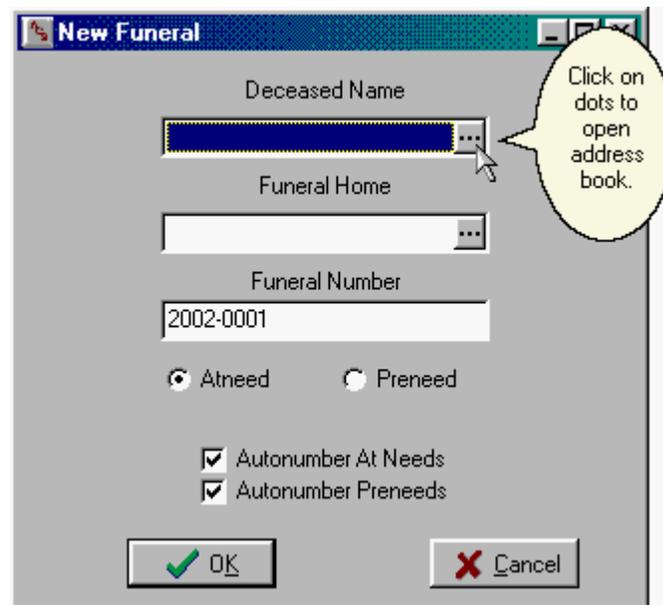
Clicking on Open from the Find a Funeral Window will open the highlighted Funeral. So before you click on open you will want to highlight the correct Funeral. Initially your Funerals will be listed in alphabetical order beginning with the A's. However, you may change the list to be ordered by Funeral Numbers or Dates of Death, by names other than the Deceased's, or by at-need or preneed Contract Numbers. Simply use the radio buttons in the upper left hand corner of the window to select the order you prefer.

At first, your list will be short and you will find it easy to simply scroll to the Funeral of your choice. When your list gets longer though, you'll want to be able to jump into the middle. Simply begin typing where it says Enter a Name or Part of a Name and the list will scroll to display cases matching what you have typed. While the Field says Name, it is really a general purpose locator. So if you've chose to sort your list by Funeral Numbers, you'll want to type a number or the beginning of a number rather than a name. Similarly if your list is sorted by date, you'll type a date.

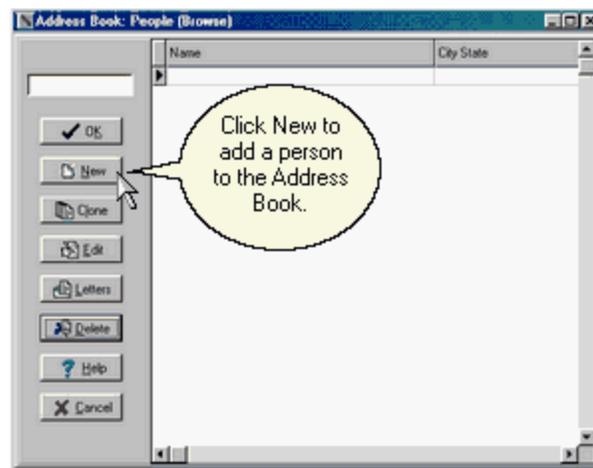
Once the Funeral you want appears in the list, click on it to highlight it and then click on Open. You may also simply double-click the highlighted entry.

3.1.3 Creating a New Funeral

Clicking on New from the Find a Funeral Window will create a New Funeral. You can create a New Funeral from any module. Once you have created it in one module if you need to use it in another module you should Open and not create it a second time.



The first step is to specify the name of the Deceased and so so click on the ellipsis (3 dots) to the right of the Deceased Name Field and your Address Book opens. You see a list of all the People whose names are already in your computer.



At first the list will be empty and you will need to click on New to add your first person. If you only have a few names you will be able to see all of them immediately, but when your list becomes long you will need to enter the beginning of the last name to scroll the list to the proper part of the alphabet. If you see that the name is already on your list, click on it to highlight it and click OK. You may also double-click on the name. If the name is not on your list, click on New to open the People Entry Window.

The screenshot shows a form titled 'Address' with the following fields and callouts:

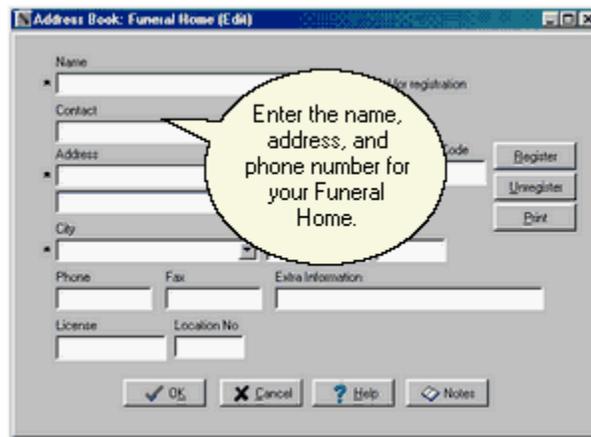
- Title:** A dropdown menu with a callout bubble containing 'Mr., Mrs., Dr., etc.'
- First Name, Middle Name, Ending:** Three text input fields.
- AKA (Full Maiden Name if Added):** A text input field.
- Address:** A text input field with a callout bubble containing 'Last name.', 'First name.', and 'Middle name.'
- City, State, Zip, Sex:** Four dropdown menus.
- Phone, SSN, Birth Date, Death Date:** Four text input fields.
- Death After Sundown:** A checkbox.
- Date of Death:** A text input field with a callout bubble containing 'Use numbers for dates.'
- Buttons:** 'OK', 'Cancel', and 'Help' buttons at the bottom.

This is a good place to remind you that you don't need to fill in every field just because it is there. Think about the things you plan to print and fill in the information you need and skip the rest unless you have to need to record the information for future use. Fill in the fields and then click on OK. You will be returned to the list of People and your new name will have been added. Now you may click on OK again to select that name as your Deceased.

After you have chosen the name, the New Funeral Window will appear briefly with your chosen name included and then the Address Book will open again automatically to allow you to specify your Funeral Home location.

The screenshot shows a window titled 'Address Book: Funeral Home (Browse)'. It features a table with columns 'Name' and 'Contact'. On the left side, there is a vertical toolbar with the following buttons: 'OK', 'New', 'Edit', 'Letters', 'Delete', 'Help', and 'Cancel'. A callout bubble points to the 'New' button with the text: 'Click New to add your Funeral Home to the Address Book.'

We have returned to the Address Book, but unlike before when we were shown People, this time we are shown Places. If this is our first time using this list, it will be empty and we need to click on New to enter our first Place. Once you have entered your funeral homes, you need only select them from this list.



Enter the information for your funeral home. Ignore the boxes about Registration unless you are on the phone with a support technician. If you begin a phone number with a (to enclose the area code, the program will add the rest of the punctuation automatically. Click on OK to save this information and return to the Address Book.



Then click on OK again to use this location for your case.

Funeral Numbers are optional. You'll probably want to enter them if you are using LedgerPRO, A/R PRO, or P/N PRO, but ignore them if you are only using PrintPRO. The program automatically supplies a number in the format shown above. If you do not want the program to autonumber, remove one or both of the check marks on this screen. If you want automatic numbering but use a different format, leave the check marks but change the number for your first case. The program will assign a number one higher for your next case.

A radio button allows you to specify that the case is a preneed. The default value will be at-need cases unless your are in P/N PRO.

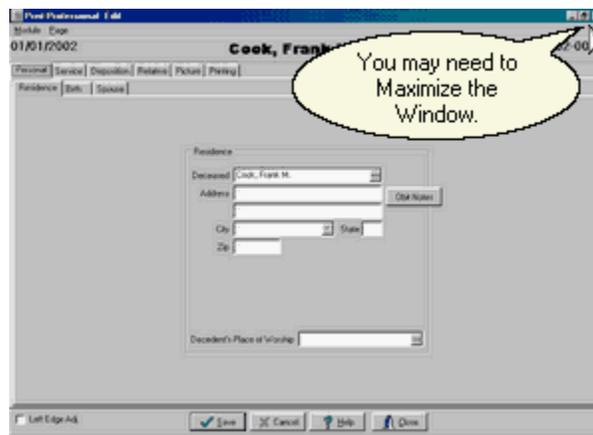
When all of the information is correct, click OK to create the new case.

3.1.4 Deleting a Funeral

Clicking on Delete from the Find a Funeral Window will delete the highlighted Funeral. The process of locating a Funeral and highlighting it is identical whether you then wish to Delete it or you wish to Open it.

3.1.5 The Tabbed Notebook

After you have opened or created a funeral in LedgerPRO or PrintPRO, The Tabbed Notebook will appear. The Notebook will have minor differences depending upon which module you are using.



Clicking on the tabs at the top of the window, cause that tab to move to the front. In the illustration, the Birth tab of the Personal tab is in front. As you can see, the Personal tab is a notebook within a notebook.

The spaces on the middle of the tab sheet are for the display and entry of data. They are called Fields. The process of data entry depends upon the type of field. The field types are Names and Places, Masked Fields, Lists, Check Boxes, and Notes.

At the bottom of the tabbed notebook, you will find buttons saying Save, Cancel, Help and Close. You may press a button by clicking on it with your mouse. Also many buttons have a letter in their name underlined. For example, the S in Save is underlined. This means the button may also be pressed by holding down the Alt key and tapping that letter. Saves stores the changes you have made to the data. Cancel restores the data to the values that were there when you opened the notebook. Clicking on the Help Button will display this information page. Close returns you to the Find a Funeral window.

A Module Menu at the top left allows you to move between Modules without having to return to the Main Menu and reselecting your case. You stay in the same case when you use the Module Menu.

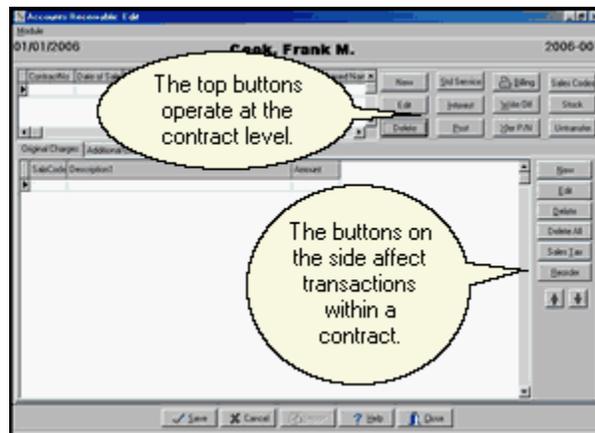
A Page Menu to the right of the Module Menu provides an alternate way to move between tabs.



Since the Page Menu has hot-keys (the underlined letters), it provides a way to move between tabs with the keyboard rather than the mouse.

3.1.6 The Contract List

After you have opened or created a funeral in A/R PRO or P/N PRO, The Contract List will appear. The List will have minor differences depending upon which module you are using.



The top portion of this window displays the list of contracts and has buttons which operate on an entire contract. The bottom portion of the window displays the transactions for the contract which is highlighted in the top portion.

A funeral may have more than one contract. A second contract might be used to separate items to be paid by different people, to separate selections from a guaranteed prearrangement from selections added at-need, or to reflect the sale of an item purchased after the service such as a monument.

3.1.7 The Module Menu

Once you have found a funeral in any module, you may use the Module Menu to switch to another module within the same funeral. Just click on the word Module in the upper left hand corner of the program and this menu will appear.



Your current module will be highlighted and checked. Just click on the module you want to switch to or use the hot-keys.

3.2 Fields

3.2.1 Names and Places

Fields for the entry of Names and Places have an ellipses at the right. This is the symbol with three dots.

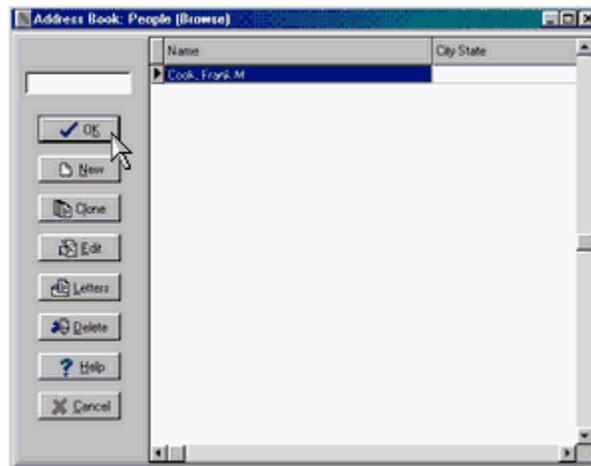


You will also find fields with a triangle at the right.



These fields are connected to Lists and not to Names and Places.

When the field is empty, clicking on the ellipses with your mouse (or holding down the Alt key and tapping the down arrow key) will bring up a list of People or Places that are already in your computer. The particular list displayed will depend upon the field that you started from. Thus, a field calling for a name of a relative will lead to the basic People list, while a field calling for a clergy's name will lead to a list of Professionals, and a field calling for a cemetery will lead to a list of places. We refer to these lists as your Address Book.



If the name you desire is already in the list, simply locate it and click on OK. At first, your lists will be short and you'll be able to scroll up and down to see if the name is there. When your lists become longer, you'll want to type part of the name in the box in the upper left hand corner of the list screen to jump down the list alphabetically. To avoid duplication, you should always look for the name to be sure it's not already there before adding new names.

If the name you want does not appear, press **N**ew and a window will appear to allow you to enter the information. You may also use **C**lone to create a new person retaining the last name and address from a prior person; **C**lone is a convenience when adding family members.

Fill in the fields and Click on OK to add the Name or Place to your list. Then click on OK again to select that name and return to the original field. The selected name will now appear in the field.

Once a name or place has been selected and filled into the field, clicking on the ellipses will lead you directly to the data entry screen for that person or place rather than to the list of names or places.

You may change information as needed and then click on OK to save it.

3.2.2 Masked Fields

Some fields are masked. This means they contain formatting information.

Date and Time fields are both masked. The punctuation appears automatically and inappropriate information will be rejected. The slashes will not appear properly, however, if you fail to type in leading zeros. So September 4th should be typed in as 0904. If you type the year in as 2 digits, such as 00 for 2000, the computer will make an assumption about what century you intend and fill in a 4 digit year. Typing in all 4 digits of the year is a foolproof method of insuring the right year, but typing in 2 digits will work too as long as you remember to look to see that the computer completed the date as you intended.

Social Security number fields and telephone number fields are also masked. With telephone numbers, entering a (as the first character to precede the area code will allow you to simply key in the digits and the program will add the spaces and punctuation.

3.2.3 Lists

Fields with a triangle on the right lead to Lists.

There are also fields with an ellipses at the right.

These fields lead not to Lists but to Names and Places.

When you click on the triangle, a list of appropriate entries for the field will appear. This list will also

appear if you hold down the Alt Key and tap the Down Arrow Key, or once there is a list if you simply begin typing in the field.

When the list appears, you may use your mouse or the arrow keys to highlight your selection and then hit Enter or double click on it to close the list and put your choice in the field.

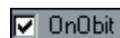
Some lists are predefined. For example, The Sex field in the illustration contains only two predefined choices: Male or Female.

Other lists are User Defined. For example, the City list will initially be empty but entries will be automatically be added to the list as you use the program. If you right click on a user list field (click on it with your right hand mouse button), a dialog box will appear allowing you to maintain your list.

You can safely maintain your lists without worrying about messing up your older cases as the information from these lists is copied into each case. So if you have some cities, for example, in your lists that are far away from your funeral home, you may safely delete them without worrying about losing the city information in the cases for which those cities were entered.

3.2.4 Check Boxes

Fields whose only possible entry is a check mark are called Check Boxes.

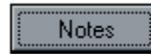


If you click on such a field with your mouse, the check mark will toggle on and off. By toggling we mean that if the field is empty clicking on it will put in the check mark, and if the field already has a

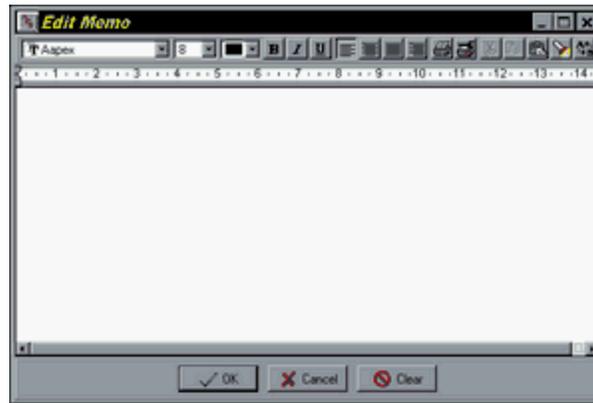
check mark clicking on it will remove it. You may also toggle the check mark with the space bar.

3.2.5 Notes

Buttons that say Notes lead to Note Fields.



Clicking on these Buttons opens a mini-word processor where you can enter paragraphs of information using the fonts and formatting you desire.



After you have written your notes and clicked on OK, you will return to the original window and now the Note Button will be checked.

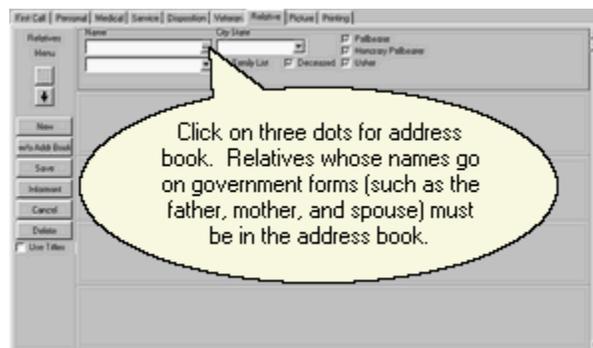


This mark signals you that information has been entered into this particular Note field.

3.3 Lists of People

3.3.1 Family and Friends

People are entered into the Relatives list from this window.



When you click on New, a empty person record will be added to the top of the list and the Address Book will appear so that you can locate the name. Fill in the fields of the empty record as appropriate. The name field is a Person Field; however, if you want to find a person from the list but change the

way the name appears for this case, you may do so. For example, you might want to find John Smith in the Address Book but change the name in your Relatives list to read Mr. and Mrs. John Smith.

You may also simply type in an entry without using your Address Book at all. For example, you might want to type in "3 Grandchildren" or "Several Nieces and Nephews" and you wouldn't want these phrases stored in the Address Book. To do this, either click on New to add a Relative and use Cancel to close the Address Book, or click on w/o Addr Book to add a record without bringing up the Book at all. The name of the spouse, mother, and father must be entered into the Address Book for use on government forms.

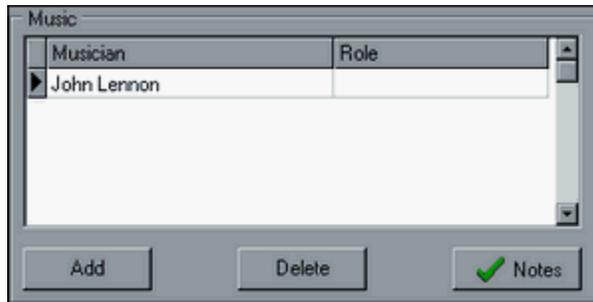
The relationship and city field are List Fields, and the remaining fields are Check Boxes.

Relatives are printed in the order they appear on this list which would initially be the order in which you chose to enter the names. However, the order may be changed. To move an entry, click on it and then click on the Red Up Arrow Symbol to move the name higher in the list or the Red Down Arrow Symbol to move it lower.

The Informant Button provides a quick way to copy the information for one of the family members to the Informant. Simply highlight the person who is to serve as the Informant and click on the button to copy the information to the First Call Tab. You may also do a similar operation in the other direction by first entering the Informant on the First Call Tab and then clicking a red arrow there to copy the information to the Family list.

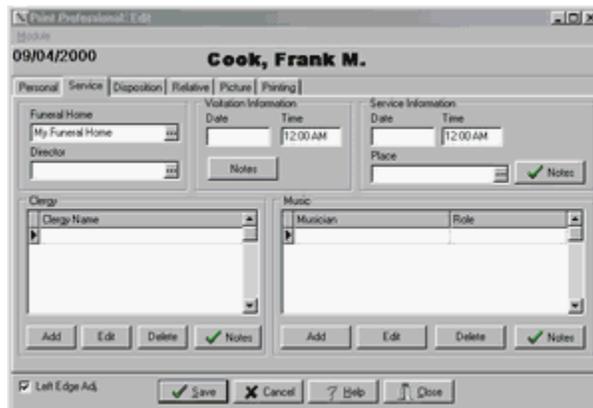
3.3.2 Clergy and Musicians

The names of Clergy and Musicians are added into lists.



The Add Button adds a name to the list and the Delete Button removes a name. The Notes button below the Musicians list is a Note field for the entry of the Musical Selections.

If you click on a name in these lists, it will be highlighted and an ellipses will appear.



Doing so reveals that these names are actually Name Fields. Like all name fields you may click on the ellipses to bring up the underlying Person information from your Address Book.

Similarly, when you click on the Role Field in the musicians list, a triangle will appear revealing that this field is a List.

4 LedgerPRO

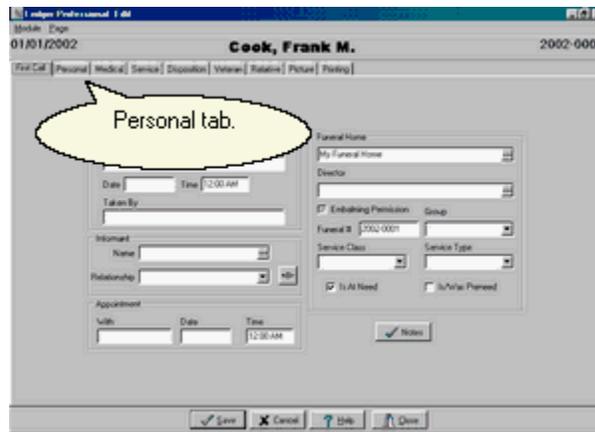
4.1 Overview

LedgerPRO is the electronic funeral ledger. It prepares all of the government forms including death certificates, burial permits, Veterans Administration claims and Social Security statements. Standard obituaries, clergy cards, and funeral ledgers as well as basic non-financial reports are also included. LedgerPRO looks and works like PrintPRO up until the point of printing when a different set of selections is presented.

When you chose LedgerPro from the Main Menu, you will be taken to the Find a Funeral Window.

4.2 First Call Tab

When you open a case in LedgerPRO, the Tabbed Notebook has the First Call Tab selected.



The Informant, Funeral Home, and Funeral Director are selected from the Address Book. Dates and Times are Masked Fields. Relationship, Group, Service Class and Service Type are all Lists. The Group list is initially empty. This field is a bonus field used in grouping cases for reports. Common uses for this field are zip codes, or town names, or church membership. A Note field is also available.

The red arrow to the right of the Informant is a short cut key. Clicking on this arrow will copy the Informant to the Family page.

4.3 Personal Tab

The Personal Tab has 3 sub-tabs in PrintPRO and 4 in LedgerPRO.



When you first click on the Personal Tab, the Residence sub-tab will be displayed. The address information is displayed for your convenience; but you can not edit these fields. If you wish to change the deceased's residence information, you must click on the ellipsis to the right of the name field to bring up the Address Book.

Clicking on the Birth sub-tab displays information about the deceased's birth.



The dates of birth and death are displayed from the Address Book and the Age is automatically calculated for you from those dates.

Clicking on the ellipsis to the right of Father or Mother will open the Address Book.

Type in the City & State for Birth and Death. As you begin to type, the program will look for the letters in the List of cities. You can also click on the arrow symbol without typing to go directly to the list.

The third sub-tab is Spouse.



The screenshot shows the 'Ledger Professional Edit' window for 'Cook, Frank M.' on '09/04/2000'. The 'Spouse' tab is selected. The form contains the following fields:

- Name: [Text Field]
- Place of Marriage: [Text Field]
- Date of Marriage: [Text Field]

Buttons at the bottom: Save, Cancel, Help, Close.

The name of the spouse is not actually entered here but it is displayed here for your convenience. The name is entered on the Relatives Tab using Husband or Wife as the Relationship. Here you may type in the Place and Date of Marriage if these are relevant to the documents you wish to print.

LedgerPRO adds a Misc sub-tab with additional fields that are relevant to government forms.



The screenshot shows the 'Ledger Professional Edit' window for 'Cook, Frank M.' on '09/04/2000'. The 'Misc' sub-tab is selected. The form is divided into two sections:

- Demographics:**
 - Education: [Text Field]
 - Origin: [Text Field]
 - Race: [Text Field]
 - Marital Status: [Dropdown Menu]
 - Citizenship: [Text Field]
 - Hispanic
- Employment:**
 - Industry: [Text Field]
 - Occupation: [Text Field]
 - Employer: [Text Field]
 - How Many Years?: [Text Field]

Buttons at the bottom: Save, Cancel, Help, Close.

4.4 Medical Tab

Selecting the Medical Tab displays:

The screenshot shows the 'Certificates' tab in the LedgerPRO software. The window title is 'Ledger Professional: Edit' and the subject is 'Cook, Frank M.' with the date '09/04/2000'. The 'Certificates' tab is active, showing fields for 'Date of Death' (Died: 09/04/2000, 12:00 AM; Pronounced: / /, 12:00 AM), 'Place of Death' (Hospital, Place of Death: Hospital/Residence/Other?, Other Place), and 'Manner of Death' (Autopsy, Released, Findings). There are also fields for 'City', 'County', 'Locality', and 'Township'. Buttons for 'Save', 'Cancel', 'Help', and 'Close' are at the bottom.

This information is used for your death certificate. Many of the fields lead to the Address Book or to Lists and a few are Check Boxes.

The Place of Death field is used for check boxes on the certificates. The similar looking Hospital/Residence/Other field is used to specify which of those three possible locations contains the address for the place of death to be used on the certificate.

Local practice varies considerably on what medical information is filled in by the funeral home and what is filled in by the Doctor when he signs the form. Simply leave blank any fields that will contain information which the Doctor will provide. If you find you want to record such information for historical purposes but not have it printed on the certificate, call our support department and arrange for an adjusted form that will not print the information the Doctor will provide even if you have entered it in your computer.

4.5 Service Tab

Clicking on the Service Tab displays:

The screenshot shows the 'Service' tab in the LedgerPRO software. The window title is 'Print Professional: Edit' and the subject is 'Cook, Frank M.' with the date '09/04/2000'. The 'Service' tab is active, showing fields for 'Funeral Home', 'Director', 'Violation Information' (Date, Time), 'Service Information' (Date, Time, Place), and 'Music' (Clergy Name, Musician, Role). There are also buttons for 'Add', 'Edit', 'Delete', and 'Notes'. A checkbox for 'Left Edge Ad.' is at the bottom left. Buttons for 'Save', 'Cancel', 'Help', and 'Close' are at the bottom.

The Funeral Home will be filled in from the information you supplied when you Created the Funeral. The Director's name on the left and the Place of Service on the right have ellipses which means they will be filled in from the Address Book.

In LedgerPRO, the Funeral Home and Director appear both on this page and the First Call Tab but the information is identical. In PrintPRO, there is no First Call Tab so the information must be entered here.

The Clergy and Music sections are Lists of People. The Date and Time fields are Masked.

This Tab includes several Notes fields. These fields allow you to type paragraphs of information for inclusion on your cards.

4.6 Disposition Tab

Clicking on the Disposition Tab displays:

The Cemetery is a Place. The Method of Disposition is a List. The Date and Time field are Masked. The Grave Location may simply be typed in. A Note field is provided for additional information concerning the disposition. Flowers and Shiva (special information for Jewish services) are also Note fields. Several Fields appear on this Tab in LedgerPRO that do not appear in PrintPRO.

4.7 Veteran Tab

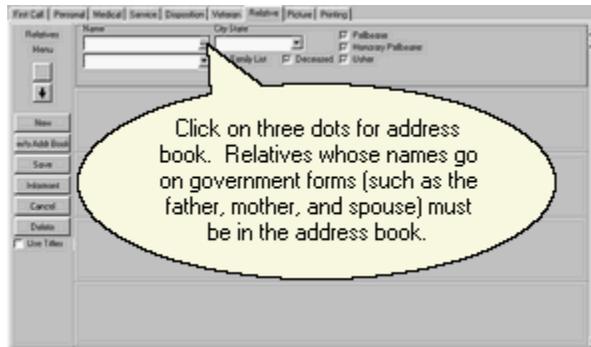
When you select the Veteran Tab, this window appears.

This data is used for Veteran's Administration Forms. Many of the fields are Lists. A Note field is provided on the general sub-tab.

The data is organized by Form Number. If you do not plan to file a particular form, there is no reason to complete that sub-tab.

4.8 Relative Tab

People are entered into the Relatives list from this window.



When you click on New, a empty person record will be added to the top of the list and the Address Book will appear so that you can locate the name. Fill in the fields of the empty record as appropriate. The name field is a Person Field; however, if you want to find a person from the list but change the way the name appears for this case, you may do so. For example, you might want to find John Smith in the Address Book but change the name in your Relatives list to read Mr. and Mrs. John Smith.

You may also simply type in an entry without using your Address Book at all. For example, you might want to type in "3 Grandchildren" or "Several Nieces and Nephews" and you wouldn't want these phrases stored in the Address Book. To do this, either click on New to add a Relative and use Cancel to close the Address Book, or click on w/o Addr Book to add a record without bringing up the Book at all. The name of the spouse, mother, and father must be entered into the Address Book for use on government forms.

The relationship and city field are List Fields, and the remaining fields are Check Boxes.

Relatives are printed in the order they appear on this list which would initially be the order in which you chose to enter the names. However, the order may be changed. To move an entry, click on it and then click on the Red Up Arrow Symbol to move the name higher in the list or the Red Down Arrow Symbol to move it lower.

The Informant Button provides a quick way to copy the information for one of the family members to the Informant. Simply highlight the person who is to serve as the Informant and click on the button to copy the information to the First Call Tab. You may also do a similar operation in the other direction by first entering the Informant on the First Call Tab and then clicking a red arrow there to copy the information to the Family list.

4.9 Picture Tab

The Picture Tab communicates with TWAIN compliant scanners to acquire pictures. It also lets you manage Clip Art by moving the selector below the picture from Deceased Pic to Clip Art.

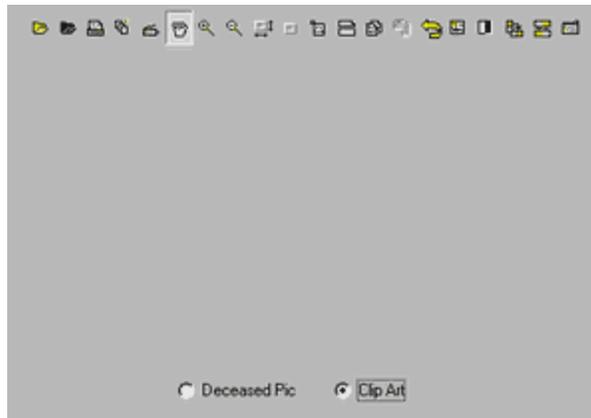


As you move your mouse over the icons, they will tell you what they do. For example, the first icon is for opening files. You would use this if the picture had already been scanned and was on your computer as a file. The second icon saves pictures to a file format. The program will save the pictures into a database and you do not need to also save them as a file unless you want to use them in other programs. The third icon will print the image. The fourth icon triggers your scanner while the fifth allows you to specify which scanner to use. Next are several icons that deal with zooming and the clipboard. Then there are icons to invert or rotate images. The final icon leads to the effect manager.

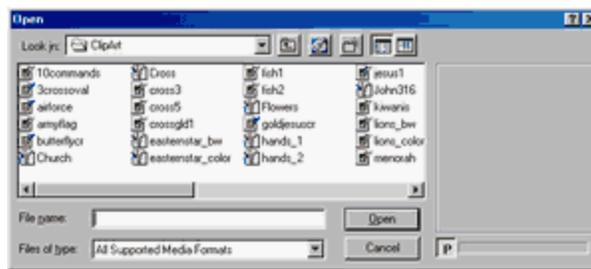


This screen provides advanced options to alter your picture. Some of the choices are fairly obvious in meaning; for example, Borders allows you to enclose your picture with a border and to specify its shape and color. Other choices are mysterious, and experimentation is the best way to learn what they do. We have included help topics written by the author of the effect manager (we purchased this part of the program from an outside company) which may be helpful if you wish to explore the advanced options.

Changing the selector to Clip Art produces:



Once again you have a row of controls. Clicking on the first icon will open folders.



This displays the images the Clip Art folder. It is not necessary to select the Art you wish to use here. This is the place where you work with your images. You could delete an image, rename it, or open it and use the controls to add effects. You use Advanced to control the actual image printed in a particular print job.

You can use the Scan Image Control to add images to this folder. You could also download images from the internet or purchase them on cd and place them into this folder.

4.10 Forms

LedgerPro prints government forms and basic service forms. Examples of government forms are Death Certificates, VA Claims, and Social Security Forms. Basic service forms include Funeral Ledgers and Obituaries.

When you click on the Forms tab in LedgerPro, a list of installed Forms will appear. Installing and printing your first form is discussed at length in the tutorial: Printing Your First Government Form.

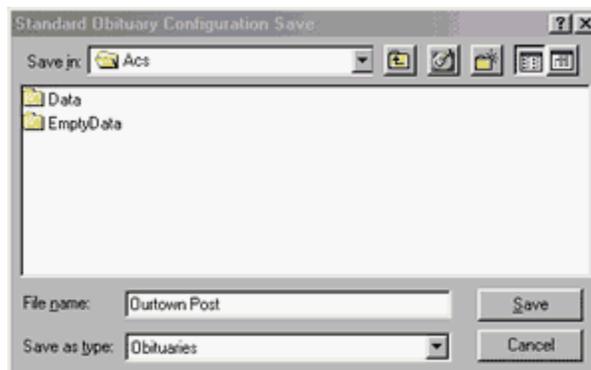
Do not be concerned if a particular government form is not included on your CD. We have a large inventory of forms programmed for our earlier versions and are moving them into this version on a state by state basis. If you decide to purchase the program, we will immediately begin work on translating the forms. This normally only takes a few weeks although if you are in a state that allows the form to be printed on plain paper it may take longer to obtain health department approval of our facsimile form.

4.11 Obituaries

Obituary printing provides for a great deal of user customization.



After you decide which information should be included, you should click on Save Settings and give them a name.



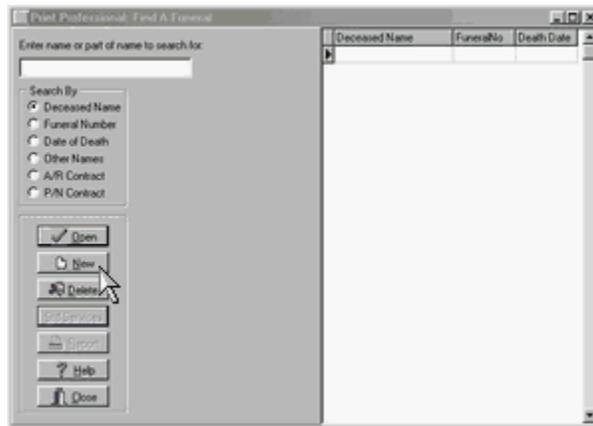
We suggest naming your Obituary configurations with the names of your newspapers. Once you have saved a configuration you can call it back up using the list to the left of the Save Setting button. You may want to save different setups for the various newspapers in your area.

Some newspapers insist on very specific obituary formats. If your newspaper will not accept any of the variations that are possible here, mail us a copy of the form and we determine if a custom format is possible and quote a price.

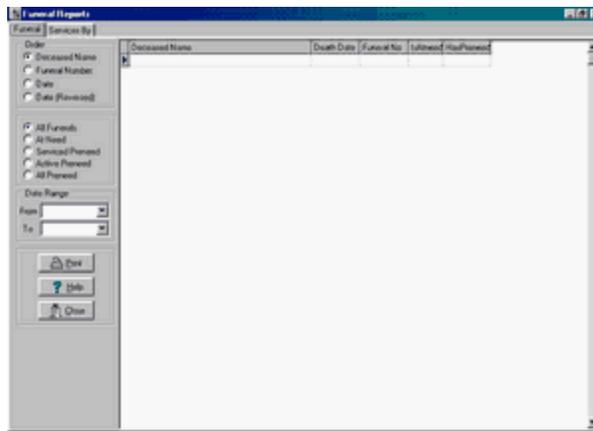
4.12 Basic Reports

Reports list information on more than one Funeral. Accordingly, they are printed not from within an individual Funeral but from the list of Funerals. Basic reports are in LedgerPro. At-need financial reports are printed from the list of Funerals in A/R Pro, and preneed financial reports are printed from the list of Funerals in P/N Pro.

Basic reports are printing by clicking on the Report Button on LedgerPRO's Find a Funeral Screen.



Doing so produces the Report Menu.



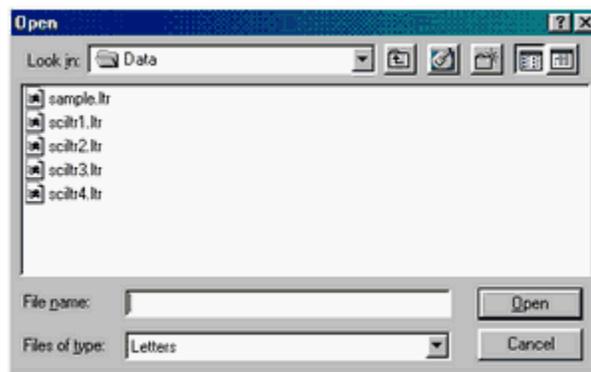
Funeral reports list basic information about cases meeting the criteria you specify. Services By reports group the cases by people or professionals.

4.13 Letters

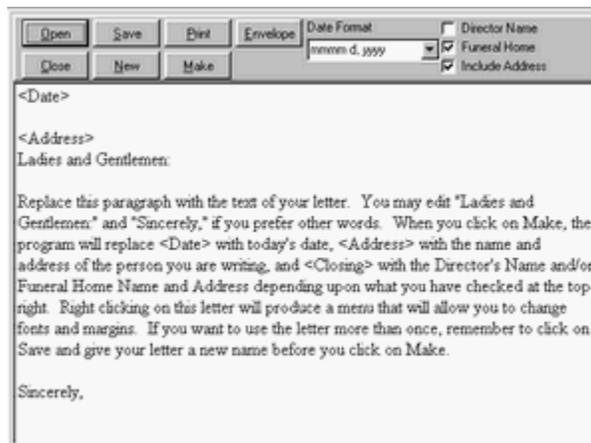
Letters may be printed from many places in the program. A Letters Button appears in the Address Book so that you can send a letter to anyone you have dealt with. Letters may also be sent to the Payors in a Contract. Pressing any Letters Button leads to:



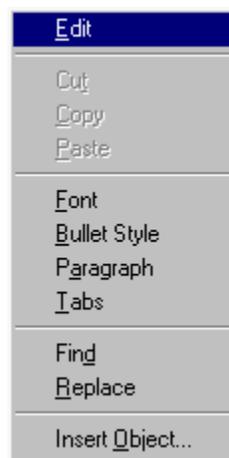
Click on Open to bring up the list of stored Letters.



We suggest you start by looking at sample.ltr although you will eventually want to look at the other letters which are designed for use in billing, too. When you open sample.ltr, you will return to the previous window.



As you can see, sample.ltr contains a basic letter format with instructions in the place of the body. Erase the body of the letter and replace it with your desired text. You may also change the formatting by clicking on the letter with your right hand mouse button to bring up a menu.

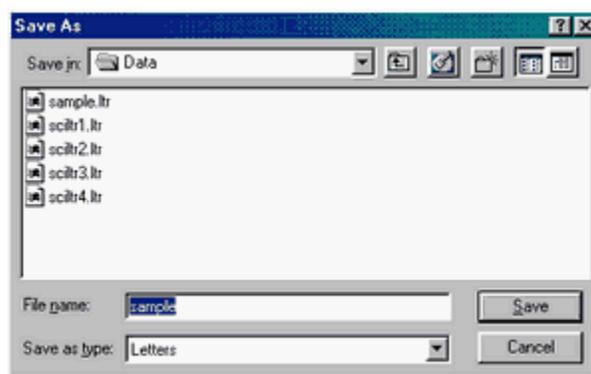


Choosing Edit from this menu will bring up an alternate editing screen with a toolbar. Choosing Font will let you change the font. Bullet Style will format a list of items. Paragraph will adjust margins and indentations. Tabs sets tabs.

As you see, sample.ltr includes structural items in brackets like <Date>. These are Tags. When you click on Make these tags will be replaced with data. <Date> becomes today's date. <Address> becomes the name and address of the person to whom the letter is being sent. Closing becomes the name of the person signing the letter. You may change the font to be used for the data by changing the font on the Tag. You may also move the tag. For example, if you want the date to be centered or right justified, you would highlight the tag, right click to bring up the menu, and then choose Paragraph. Use the drop down list and the check boxes at the upper right of the screen to format the <Date> and <Closing>, respectively.



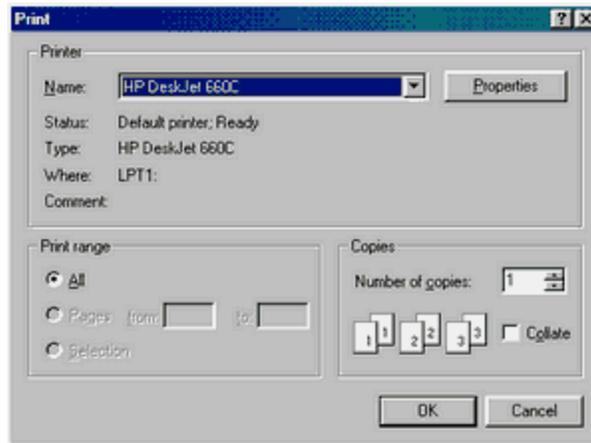
When the letter is to your satisfaction click on Save. Always save before using Make so that your Tags and not the instance data are saved.



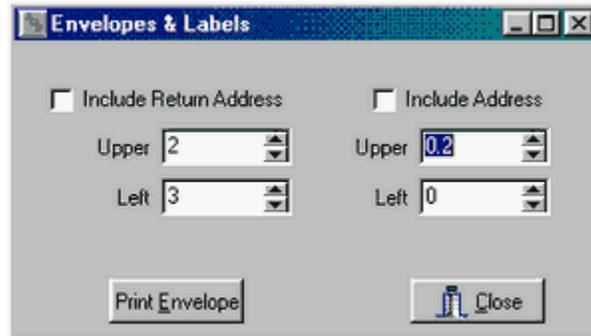
If you were to just click save at this point, you would overwrite the sample letter and lose the instructions. Also, when you next updated your program, your letter would be overwritten with our sample letter. So, change the name to something appropriate before saving.

New clears the screen so that you may type a fresh letter. Close does not close the current letter; it closes the entire letter writing process taking you back to the prior screen.

Print brings up the Windows printer dialog.



Envelope leads to a dialog



where you may position the addresses before printing.

5 A/R PRO

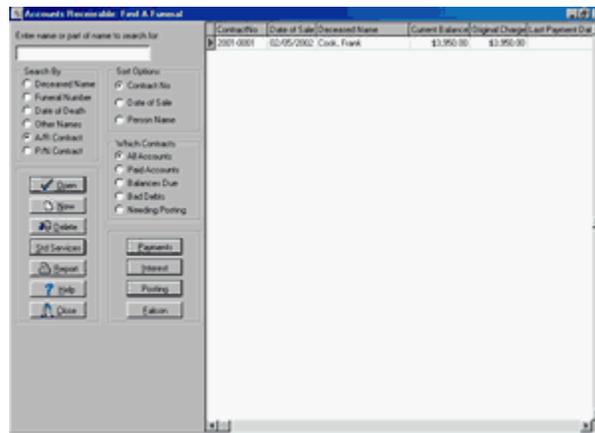
5.1 Overview

A/R PRO is for accounts receivable. This is where you enter the financial information for your at-need calls, and print bills, statements, and financial reports.

When you chose A/R Pro from the Main Menu, you will be taken to the Find a Funeral Window.

While a person may only have one Funeral, they may have more than one A/R Contract. Why would you want a second contract? You might sell a monument before or after the service and want to bill for it separately. You might want to keep the items that had been prearranged on one contract, and use a second contract for additions purchased at the time of need. You might have items that you want to bill to another funeral home instead of the family. You might have had multiple preneed contracts funded differently that you want to keep separate on the at-need side. We are sure you can think of even more reasons for multiple contracts.

The process of creating the Funeral is the same in each module. However, when you open the Funeral in A/R PRO, you will be brought to a screen which lists all of the Contracts for that deceased.



Notice that in the above illustration Search By has been changed from Deceased Name to A/R Contract. You may choose how to Search by clicking on your selection. Searching By A/R Contract reveals information and choices that are specific to the A/R module.

5.2 Creating, Editing, or Deleting a Contract

To create a New Contract, click the New Button at the top of the Contract List Window



to bring up the New/Edit Contract Window.

The funeral number will be supplied as the contract number but you can change it. If you didn't assign a funeral number, you will need to insert a contract number.

Enter the funeral director, funeral home location, and billing type then correct the Date of Sale and the interest and sales tax information, if necessary, and press Save.

The Date of Sale is the date that will appear on the Statement of Goods and Services Selected. Transactions on the Original Charges tab will carry this date unless you change it.

The Funeral Director and the Funeral Home location are Places to be selected from your Address Book.

Billing Type is useful for separating contracts into groups. For example, you can identify contracts that have been referred to collection or ones that have insurance. A Billing Type of Normal means that no other type has been specified.

The Interest Rate field contains the Annual Percentage Rate. Days Grace is the number of days you allow before you charge interest. Once you fill in this field, a date appears in the next field identifying the end of the grace period. If you check Accrue Interest From Grace, interest will be charged from the end of the grace period. If you do not check this box, interest will not be charged until after the grace period ends but once interest is charge it will be charged from the original contract date. Thus, if you use a 30 day grace period, checking this box will charge 30 days less interest. If you check Compound Interest, interest will be charged on interest; otherwise, interest will be charged only on principal. Interest is always calculated on the basis of a 365 day year with any changes in the balance being taken into account day by day.

The three checkboxes on the right (Needs Posting, Was Preneed, and Bad Debt) are normally checked for you by the program when appropriate. The Original Charge, Most Recent Payment, Current Balance, and Final Payment Date are also calculated for you by the program.

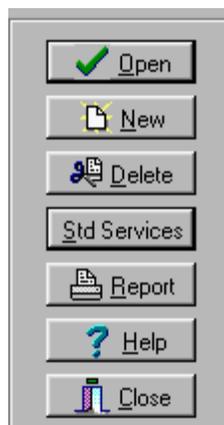
Embalming and Reason for Required Purchases are the FTC disclosures to be printed on the Contract (Statement of Goods and Services). If you handwrite this form with the family, you do not need to fill in these fields unless you want a record of the disclosures.

If you need to Edit a Contract you have already created, highlight your contract and click on the Edit Button at the top of the List Window to bring back the New/Edit Window.

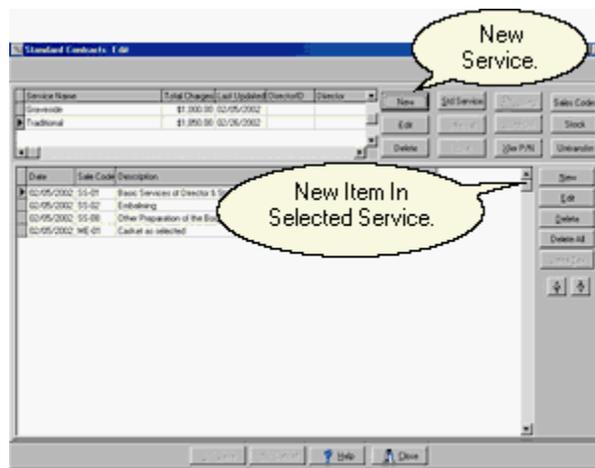
You Delete a Contract by highlighting it and clicking on the Delete Button at the top of the List Window.

5.3 Standard Services

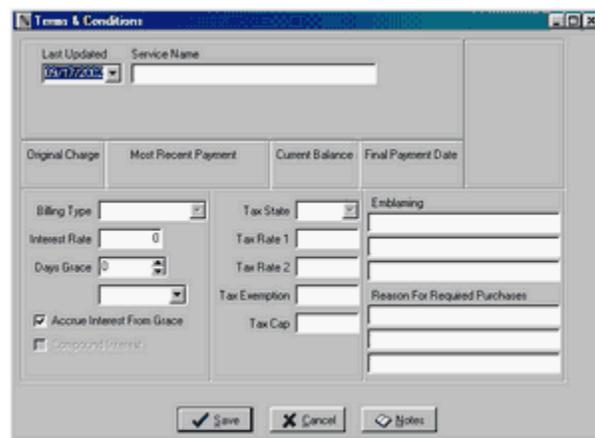
We highly recommend entering Standard Services as soon as possible. Each Standard Service is a list of items that may be copied into a contract. Standard Services are entered by selecting Std Services from the Find a Funeral Screen in A/R PRO or P/N PRO. The same Standard Services are available for you use in both at-need and preneed contracts.



Selecting this option brings up the Standard Services Editor.



The Editor looks very much like the Contract List although some buttons have been disabled. To enter a Standard Service click on New.



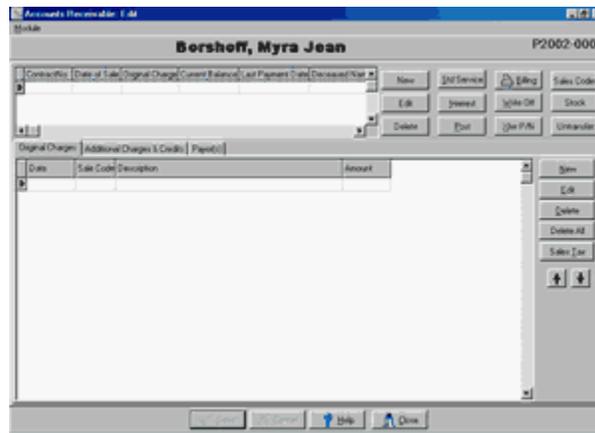
Enter a Service Name and Click on Save. Typical names for Standard Services are Traditional, Cremation, Graveside, Catholic, and Ship-Out. Any combination of items that you typically offer as a group is a candidate for a Standard Service. You should ignore the interest, sales tax, and disclosure fields as the program does not take this information from Standard Services.

Use the New Button at the right to add transactions to your service.

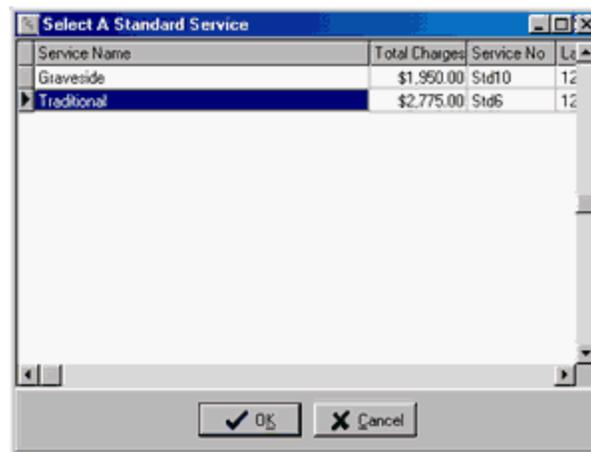
Notice that the Standard Services page has a Standard Services button at the top of it. You may use this feature to copy one Standard Service into another one.

5.4 Creating, Editing, or Deleting Transactions

Once you have created a Contract or a Standard Service, you can add transactions to it.



Using Standard Services greatly simplifies the process of adding transactions. If you have created Standard Services, just click on the Standard Services Button at the top of the Accounts Receivable Edit Screen and a list of your Services will appear.



Select the Service name that is most appropriate and click **OK** and all of the transactions from that Standard Service will be copied into your Contract or Service. Yes, you can copy one Standard Service into another one or copy more than one Standard Service into a single Contract.



Notice that this Standard Service included a transaction for a Casket without a price. Including items without prices in your Standard Services simplifies completing the actual contract. Select the Casket Item and click on the Edit button to the right of the transactions to bring up the screen to edit this transaction.

Fill in the price or better yet enter a Stock Number and click on Save or Add Another. Either button will add the revised item to the list. Add Another clears the Edit Window so you can create more transactions while Save takes you back to the transaction list.

Clicking on the New Button to the right of the transaction list opens the same Transaction Window we just discussed. When we saw this window before the Sales Code (ME-01) had been filled in from the Standard Service, but when you enter a new transaction you will begin by specifying this code. In a new contract the first charge is normally of type SS-01, the Basic Services of Director and Staff. SS indicates Services Staff. The casket charge was an ME or Merchandise Item. Other types are SU (Services - Use of Facilities), SA (Services - Auto), SP (Services - Package), CA (Cash Advances), etc.

Stock provides a short cut for filling in all the other fields for this item. Click on the three dots to bring up the stock list for items matching the specified Sales Code.

Two taxable checkboxes are provided. Your State may not charge Sales Tax in which case you may ignore these checkboxes. If your State taxes some items and not others, check the Taxable1 box on the items subject to tax. Some States have more complicated tax rules which bring both checkboxes into use. By default Taxable 1 is checked for Merchandise items; you may change the default conditions of the Tax checkboxes by modifying the Sales Codes.

The Posted checkbox indicates whether the transaction has been sent to an integrated bookkeeping program. It is not normally necessary to check or uncheck this box manually.

The On Contract checkbox indicates whether the transaction is part of the Original Contract or belongs in Additional Charges and Credits. You may have noticed that tabs above the transactions carry these designations. Normally you will place a transaction on one tabsheet or the other by selecting that tab before you add the transaction; however, you can move a transaction to the other tabsheet by adding or removing the check in the On Contract box.

Additional Charges and Credits does not mean items over and above your standard offering. It means items selected after the FTC mandated contract was prepared. Payments not made at the time of the original contract would go into Additional Charges and Credits as would Interest. While payments may be added within the contract just as any other item, they may also be added using the Payments Button that appears on the Find A Funeral Window when Search By is set to A/R Contracts.

Separate Buttons are provided to Delete and to Delete All. The first button deletes only the selected transaction which Delete All deletes all of the items in a single step.

The red arrows pointing up and down allow you to change the order of the transactions. Select a

transaction and click on the up arrow to move it higher in the list or the down arrow to move it lower.

When you have entered all of your contract items, you add Sales Tax by clicking on the Sales Tax button at the top of the screen. This will add tax using the rates entered into the contract taking into account the checkboxes in the individual items. Interest transactions are also added using a button at the top of the screen.

5.5 Payors

Payors are entered within the contract.

The screenshot shows a software window with four tabs: 'Original Charges', 'Additional Charges & Credits', 'Payor(s)', and 'Funeral Detail'. The 'Payor(s)' tab is active. On the left, there is a list box with the names 'Buckle, Big' and 'Curry, Amelia'. On the right, there are input fields for 'Address' (containing '1234 Main Street'), 'Phone', and 'Indemnity, Basic (40%)'. There are buttons for 'New', 'Edit', 'Delete', and 'Envelope'.

A contract may have more than one payor.

5.6 Funeral Detail

A fourth tab in the transaction area is labeled Funeral Detail. The same information appears in at-need and preneed contracts although the other tabs are labeled slightly differently depending up which module you are using.

The screenshot shows the 'Funeral Detail' tab in the software window. It contains several fields: 'Funeral #' (with a dropdown menu), 'Group' (with a dropdown menu), and a checkbox for 'At/In Preneed'. Below these are 'Service Class' and 'Service Type' dropdown menus. At the bottom, there is a checkbox for 'Enabling Permission' and a 'Notes' button with a checkmark icon.

This tab provides access to some fields that are normally entered in LedgerPRO. These fields are used in reports. They may be accessed here if you find that more convenient or you do not own LedgerPRO.

5.7 Sales Tax

To add Sales Tax, click the Sales Tax button on the right hand side of the Original Charges tab sheet.

Date	Sub Code	Description	Amount
12-05-2002	15-01	Basic Services of Director & Staff	\$1,500.00
12-05-2002	15-02	Embalming	\$150.00
12-05-2002	15-08	Other Preparation of the Body	\$200.00
12-05-2002	ME-01	Casket as selected	\$2,000.00
12-05-2002	15-01	State Sales Tax	\$100.00

The rules for calculating Sales Tax are determined by the Contract and the individual items. The tax rates are specified in the Contract.

The Tax State is the two letter abbreviation for the State whose tax rules apply to this contract. Tax Rate 1 is the rate which will be applied to Items which have Taxable 1 checked. Tax Rate 2 will be applied to Items with Taxable 2 checked. Exemption and Cap are only needed in a few states so if these terms are unfamiliar, you probably should skip these fields.

The following screen shows a merchandise item with Taxable 1 checked.

By default Taxable 1 is checked for Merchandise items; you may change the default conditions of the Tax checkboxes by modifying the Sales Codes.

5.8 Interest

To add Interest to a single contract, click the Interest button at the top of the Contract List.



To add Interest to all of your contracts, click on the Interest button which appears on the left of the Find a Funeral Window when you set Search By to A/R or P/N Contracts.



The rules for calculating interest are specified in the Contract.

The Interest Rate field contains the Annual Percentage Rate. Days Grace is the number of days you allow before you charge interest. Once you fill in this field, a date appears in the next field identifying the end of the grace period. If you check Accrue Interest From Grace, interest will be charged from the end of the grace period. If you do not check this box, interest will not be charged until after the grace period ends but once interest is charge it will be charged from the original contract date. Thus, if

you use a 30 day grace period, checking this box will charge 30 days less interest. If you check Compound Interest, interest will be charged on interest; otherwise, interest will be charged only on principal. Interest is always calculated on the basis of a 365 day year with any changes in the balance being taken into account day by day.

5.9 Billing

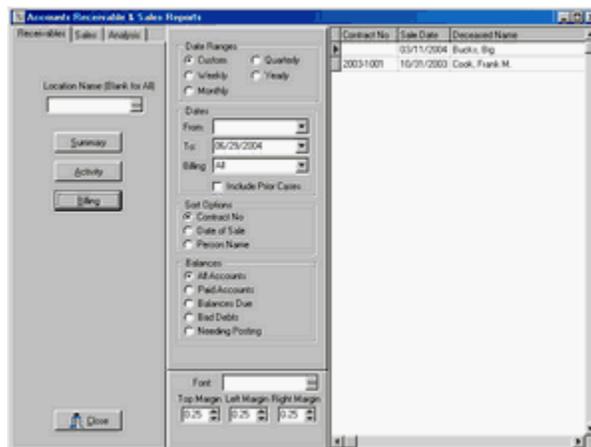
Two different buttons lead to billing. If you want to bill a single case, you would use the Billing Button at the top of the Contract Screen.



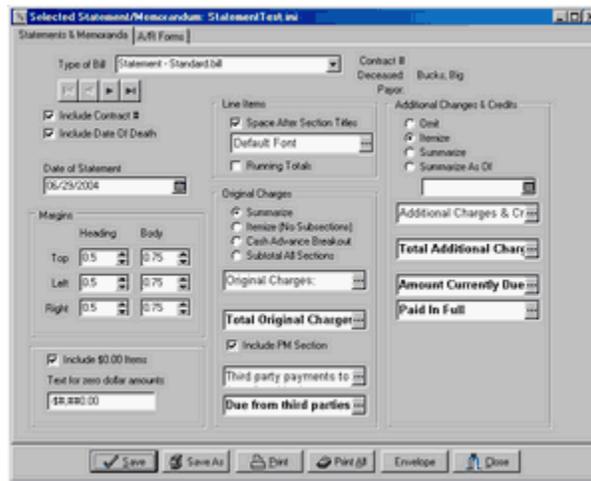
If you want to bill a batch of cases, you would first click on Report from the A/R PRO or P/N PRO Find a Funeral Screen.



Then you would use the screen that appears to identify the batch,



and then click on Billing. This brings up the same screen that appears when you select billing from the Contract Screen.

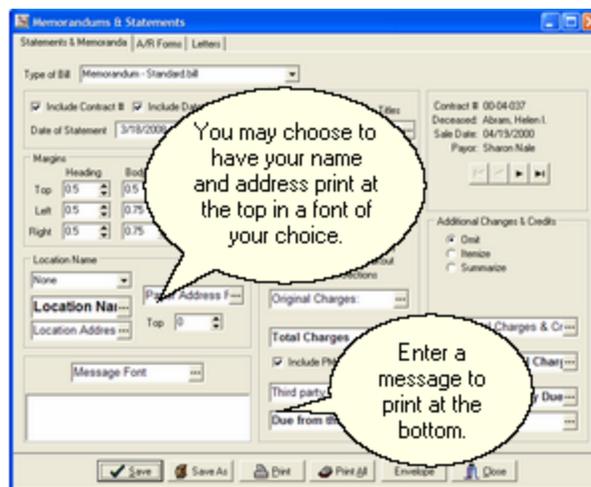


Several predefined Billing Formats are provided. Use the Type of Bill Field to select one.



Memorandums print the transactions from the Original Contract while Statement include the Additional Charges and Credits. We suggest you begin by printing out each of the predefined formats to see which you like best. As you do so, you will see that selecting a Type of Bill fills in the various fields in the Billing Screen.

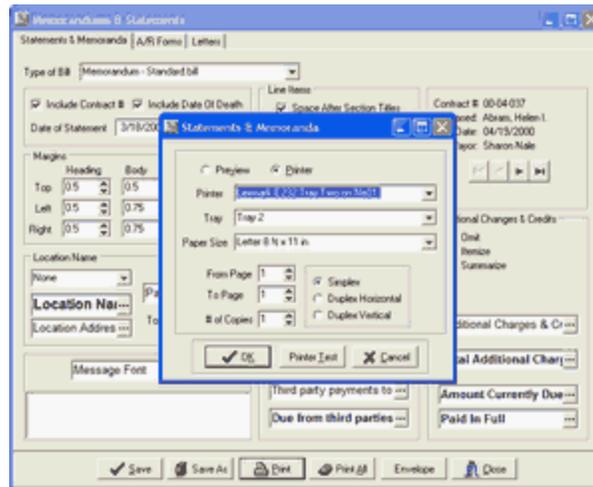
Below the margins fields, you will find a section headed Location Name. In our formats None has been selected which would be appropriate if you are printing on your letterhead. Of course, you may have to adjust the top margin to bring the printing down below your pre-printed heading. If you wish to print your bills on plain paper, you can change this field to print your main office name and address or the name and address of the particular location which handled this service. Clicking on the triple dots will allow you to change the fonts.



A message area is in the lower left hand corner. Several special key words are available for your use in messages. <date> will be replaced with the current date. <sold> will become the contract date. <grace> will become the date interest begins. <due> will become the current balance. <apr> will become the interest rate.

After you have selected a format (or formats) that you will use, you may change the fields and Save them or use Save As to give your own name to the modified format. For example, you might choose to use Save As to create a series of statements with messages of increasing severity to use as the case becomes older.

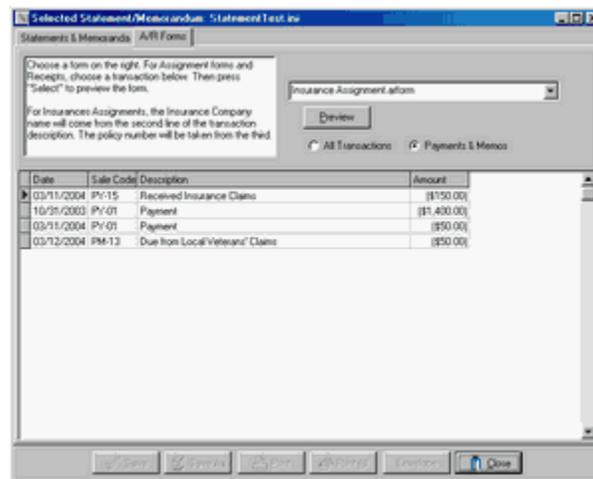
With the format selected, click on Print to bring up the Printer Dialog.



Set the Destination to Printer or Preview, set the tray and the number of copies, and click OK.

5.10 A/R Forms

A second tab under Billing is labeled A/R Forms. The same tab appears under at-need and preneed although the available forms differ.



Here you may print Insurance Assignments and Contracts (Statements of Goods & Services).

When you first come to this tab, Insurance Assignment will be selected. The assignment form assumes you have entered a transaction in the amount to be assigned. Click on the appropriate transaction from the list and select Preview.

To print a Statement of Goods and Services, select that form from the pull down list.

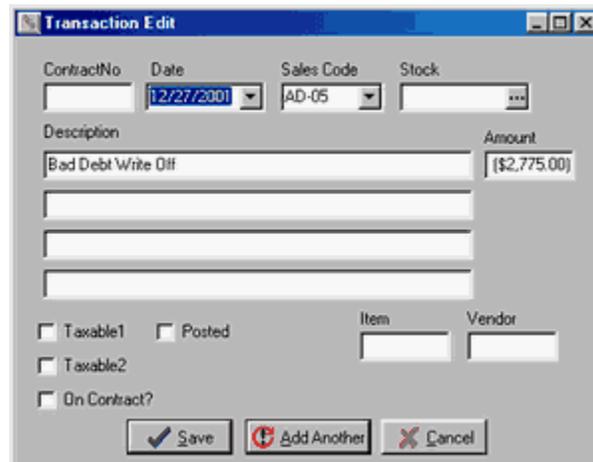


5.11 Write Off

At the top of the Contract Edit screen, you will find a one step Write Off button. Clicking on it first presents a confirmation box.



If you chose to continue, the program will propose the entry of a transaction bringing the balance to zero.



When you save this transaction, the program will also check the Bad Debt box in the contract.

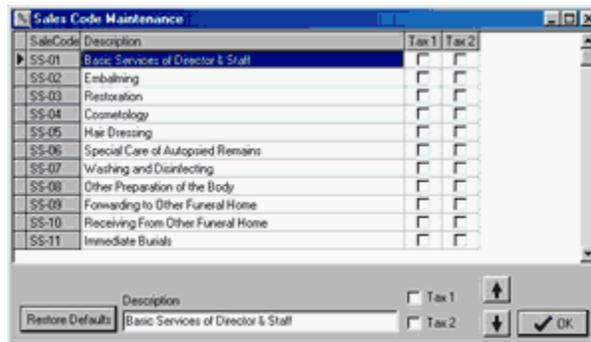
There is also a Write Off button on the A/R find a funeral window which may be used to Write Off a number of cases at one time.

5.12 Post

The Post Button transfers unposted transactions from the selected contract to supported bookkeeping programs. There is also a Post Button that appears on the Find a Funeral Window when you Search By A/R Contracts; this Post Button is for posting all of your contracts at one time. Posting is an optional feature.

5.13 Sales Codes

The Sales Code Button at the top of the Contract Edit Screen allows you to modify the list of Codes.



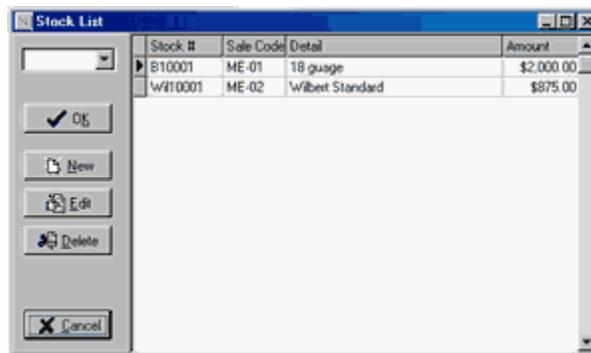
You may change the descriptions of the codes to suit your needs. We recommend you limit your changes to changing the wording leaving the basic meaning of each item unchanged.

You may also change the tax checkboxes to reflect the rules of your state. By default, service items have both tax boxes unchecked and merchandise items check Tax 1.

Up and down arrows are provided to allow you to move items up and down in the list. When transactions are added to a contract, they are inserted in the order provided here with Service Items first. Changing the order here changes where they will be inserted into new contracts. The order of existing contracts will not be affected.

5.14 Stock

The Stock Button at the top of the Contract Edit Screen allows you to create Stock Numbers.



When you click on New to add an item, you will be presented with a screen very similar to the transaction edit screen.

The screenshot shows a 'Transaction Edit' window with the following fields and values:

- Sales Code: ME-01
- Stock No: B10001
- Description: Casket as selected
- Amount: \$2,000.00
- Detail: 18 guage
- Vendor: Batesville Casket Company
- Serial No: (empty)
- Taxable1:
- Taxable2:

Buttons at the bottom: Save, Add Another, Cancel.

Stock numbers provide a convenient way to preenter your selections. Most people create stock numbers for their caskets and perhaps their vaults, but numbers can be created for items within any sales code. We recommend the use of stock numbers for all merchandise to facilitate more detailed reporting.

Note that all full four lines of description for each item are provided. The default descriptions provided in the Sales Codes are only one line long. For example, the default description for a casket is "Casket as Selected". If you prefer to present the family with a detailed description of the particular casket they choose, we suggest you enter the longer description into your Stock List.

The Detail field is where you put the description you use for the item internally. The above example shows "18 guage" in the detail field and "casket as selected" in the description field. You might have noticed that "18 guage" also appeared in the list of Stock Items which appeared earlier in this help item. Use the Detail field to help you identify the item to your staff and the long description field to identify the item for the family. The Detail field is used for reports while the Description field is used in billing.

5.15 Transfer Pneed to At-Need

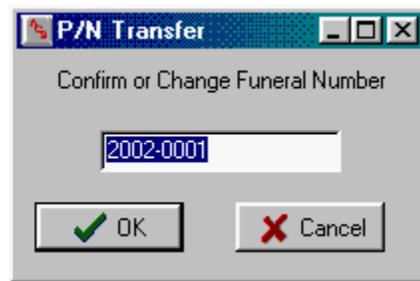
To transfer a Pneed Contract to At-Need, click on the Xfer P/N Button at the top of the Contract List.

The screenshot shows a grid of buttons:

New	Std Service	Billing	Sales Codes
Edit	Interest	Write Off	Stock
Delete	Post	Xfer P/N	Untransfer

You may perform this operation in P/N PRO and push the Contract over to A/R PRO, or you may perform the operation in A/R PRO pulling the Contract over from P/N PRO. There is also an Untransfer Button which will reverse the operation in case you transfer a contract by mistake.

When you transfer a Contract, you may change the Funeral Number if desired.

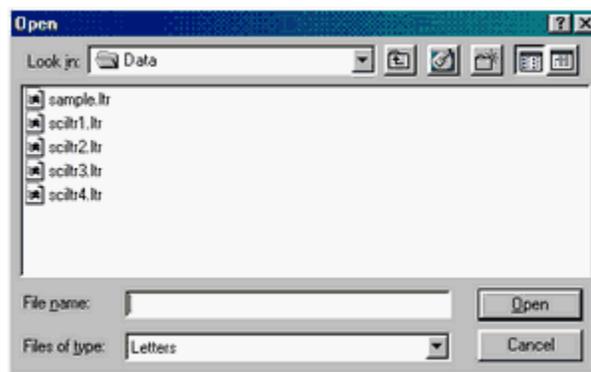


5.16 Letters

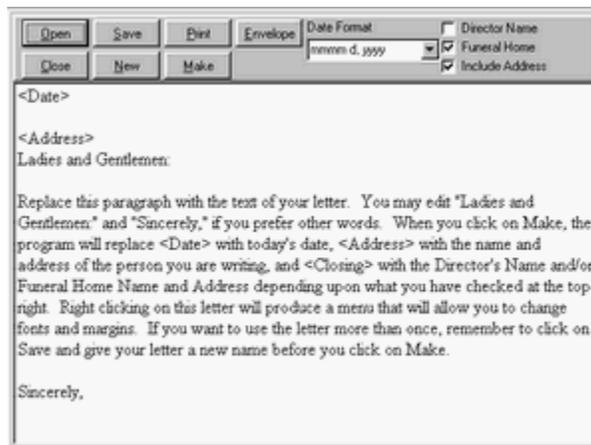
Letters may be printed from many places in the program. A Letters Button appears in the Address Book so that you can send a letter to anyone you have dealt with. Letters may also be sent to the Payors in a Contract. Pressing any Letters Button leads to:



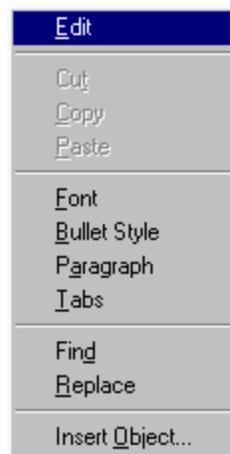
Click on Open to bring up the list of stored Letters.



We suggest you start by looking at sample.ltr although you will eventually want to look at the other letters which are designed for use in billing, too. When you open sample.ltr, you will return to the previous window.



As you can see, sample.ltr contains a basic letter format with instructions in the place of the body. Erase the body of the letter and replace it with your desired text. You may also change the formatting by clicking on the letter with your right hand mouse button to bring up a menu.

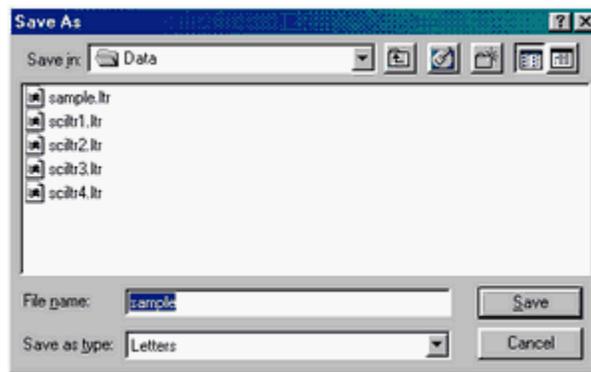


Choosing Edit from this menu will bring up an alternate editing screen with a toolbar. Choosing Font will let you change the font. Bullet Style will format a list of items. Paragraph will adjust margins and indentations. Tabs sets tabs.

As you see, sample.ltr includes structural items in brackets like <Date>. These are Tags. When you click on Make these tags will be replaced with data. <Date> becomes today's date. <Address> becomes the name and address of the person to whom the letter is being sent. Closing becomes the name of the person signing the letter. You may change the font to be used for the data by changing the font on the Tag. You may also move the tag. For example, if you want the date to be centered or right justified, you would highlight the tag, right click to bring up the menu, and then choose Paragraph. Use the drop down list and the check boxes at the upper right of the screen to format the <Date> and <Closing>, respectively.



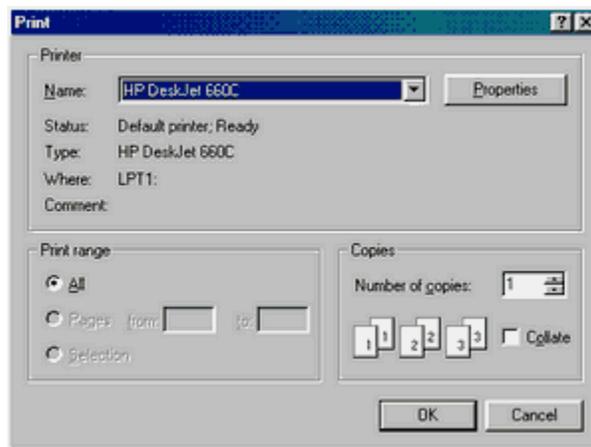
When the letter is to your satisfaction click on Save. Always save before using Make so that your Tags and not the instance data are saved.



If you were to just click save at this point, you would overwrite the sample letter and lose the instructions. Also, when you next updated your program, your letter would be overwritten with our sample letter. So, change the name to something appropriate before saving.

New clears the screen so that you may type a fresh letter. Close does not close the current letter; it closes the entire letter writing process taking you back to the prior screen.

Print brings up the Windows printer dialog.



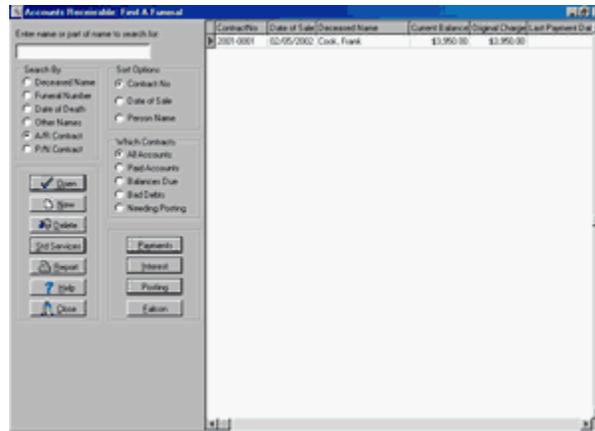
Envelope leads to a dialog



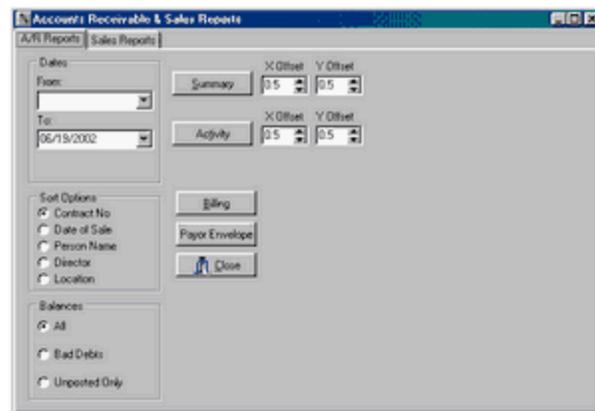
where you may position the addresses before printing.

5.17 At-need Reports

At-need reports are printing by clicking on the Report Button on A/R PRO's Find a Funeral Screen.



Doing so produces the Report Menu.



A/R Reports provide information about who owes you money on a specified date. Sales Reports provide information about how much business you did in a certain time period.

6 P/N PRO

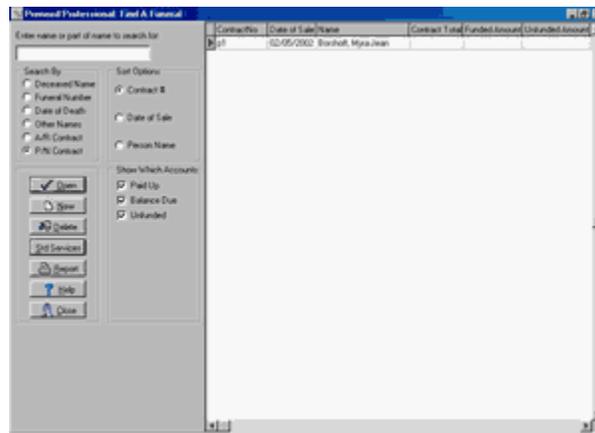
6.1 Overview

P/N PRO is for preneed. This is where you enter the financial information for your preneeds, and print bills, statements, and financial reports.

When you chose P/N Pro from the Main Menu, you will be taken to the Find a Funeral Window.

While a person may only have one Funeral, they may have more than one P/N Contract. They might have multiple prearrangements made at different times.

The process of creating the Funeral is the same in each module. However, when you open the Funeral in P/N PRO, you will be brought to a screen which lists all of the Contracts for that deceased.



Notice that in the above illustration Search By has been changed from Deceased Name to P/N Contract. You may choose how to Search by clicking on your selection. Searching By P/N Contract reveals information and choices that are specific to the A/R module.

6.2 Creating, Editing, or Deleting a Contract

To create a New Contract, click the New Button at the top of the Contract List Window



to bring up the New/Edit Contract Window.

The funeral number will be supplied as the contract number but you can change it. If you didn't assign a funeral number, you will need to insert a contract number.

Enter the funeral director, the funeral home location, funding type, taxability, and status; and then correct the Dale of Sale, if necessary, and press Save.

The Date of Sale is the date that will appear on the Statement of Goods and Services Selected. Transactions on the Original Charges tab will carry this date unless you change it.

The funeral director and the funeral home location are Places to be selected from your Address Book. Funding type, taxability, and status are selected from Lists.

If you need to Edit a Contract you have already created, highlight your contract and click on the Edit Button at the top of the List Window to bring back the New/Edit Window. You will always want to Edit your Contracts if the funding type is other than unfunded as additional fields appear with a preneed contract after you have specified trust or insurance funding.

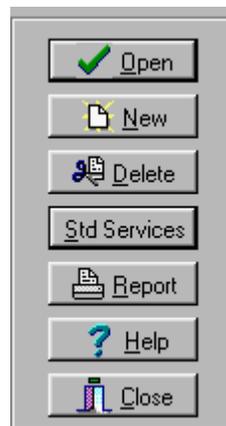
The screenshot shows the 'Preneed Contract' window with the 'Trust Details' tab selected. The form contains the following fields: Contact, Instrument, Account No, Certificate No, Redemption, Interest, TaxID, Receipt, and a checked 'Revocable' checkbox. At the bottom, there are 'Save' and 'Cancel' buttons.

The screenshot shows the 'Preneed Contract' window with the 'Insurance Details' tab selected. The form contains the following fields: Agent Name, Sale Location, Policy Number, Plan Name, Commission Rate, Commission Paid, Commission Owed, Premium, Face Value, Interest, Counselor Rate, Counselor Paid, Counselor Owed, Cycle, Discount, and Rebate. At the bottom, there are 'Save' and 'Cancel' buttons.

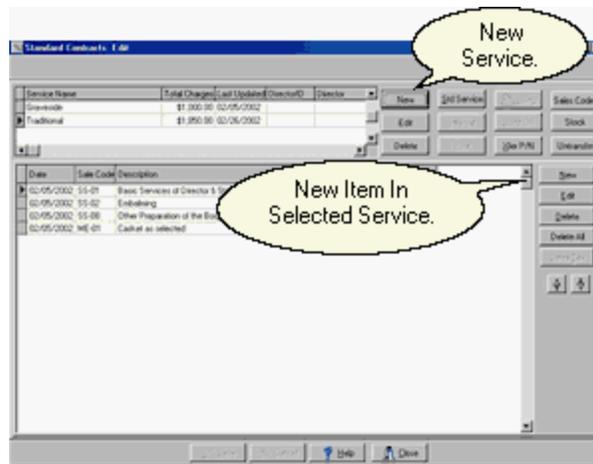
You Delete a Contract by highlighting it and clicking on the Delete Button at the top of the List Window.

6.3 Standard Services

We highly recommend entering Standard Services as soon as possible. Each Standard Service is a list of items that may be copied into a contract. Standard Services are entered by selecting Std Services from the Find a Funeral Screen in A/R PRO or P/N PRO. The same Standard Services are available for you use in both at-need and preneed contracts.



Selecting this option brings up the Standard Services Editor.



The Editor looks very much like the Contract List although some buttons have been disabled. To enter a Standard Service click on New.

Last Updated: 02/17/2002

Service Name: _____

Original Charge: _____ Most Recent Payment: _____ Current Balance: _____ Final Payment Date: _____

Billing Type: _____ Interest Rate: 0 Days Grace: _____

Tax State: _____ Tax Rate 1: _____ Tax Rate 2: _____ Tax Exemption: _____ Tax Cap: _____

Enblaming: _____

Accue Interest From Grace Compound Interest

Reason For Required Purchases: _____

Buttons: Save, Cancel, Notes

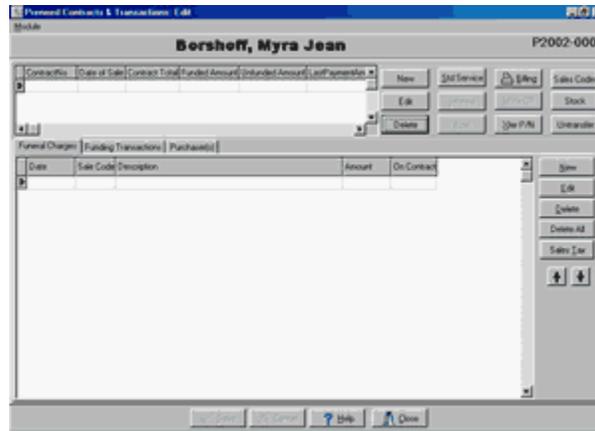
Enter a Service Name and Click on Save. Typical names for Standard Services are Traditional, Cremation, Graveside, Catholic, and Ship-Out. Any combination of items that you typically offer as a group is a candidate for a Standard Service. You should ignore the interest, sales tax, and disclosure fields as the program does not take this information from Standard Services.

Use the New Button at the right to add transactions to your service.

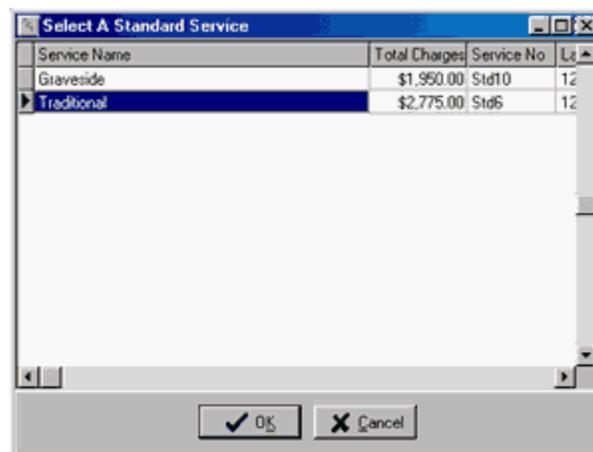
Notice that the Standard Services page has a Standard Services button at the top of it. You may use this feature to copy one Standard Service into another one.

6.4 Creating, Editing, or Deleting Transactions

Once you have created a Contract or a Standard Service, you can add transactions to it.



Using Standard Services greatly simplifies the process of adding transactions. If you have created Standard Services, just click on the Standard Services Button at the top of the Accounts Receivable Edit Screen and a list of your Services will appear.



Select the Service name that is most appropriate and click **OK** and all of the transactions from that Standard Service will be copied into your Contract or Service. Yes, you can copy one Standard Service into another one or copy more than one Standard Service into a single Contract.

Date	Sub Code	Description	Amount	On Contract	Spec
12/05/2002	SS-01	Basic Services of Director & Staff	\$1,500.00	True	
12/05/2002	SS-02	Embalming	\$190.00	True	
12/05/2002	SS-08	Other Preparation of the Body	\$200.00	True	
12/05/2002	ME-01	Casket as selected		True	

Notice that this Standard Service included a transaction for a Casket without a price. Including items without prices in your Standard Services simplifies completing the actual contract. Select the Casket Item and click on the Edit button to the right of the transactions to bring up the screen to edit this transaction.

ContractNo	Date	Sales Code	Stock No
2001-0001	12/17/2001	ME-01	...
Description		Amount	
Casket as selected			
Detail		<input checked="" type="checkbox"/> Taxable1 <input type="checkbox"/> Taxable2 <input checked="" type="checkbox"/> On Contract? <input checked="" type="checkbox"/> Posted	
Vendor		...	
Serial No			
<input checked="" type="button"/> Save		<input type="button"/> Add Another	
		<input type="button"/> Cancel	

Fill in the price or better yet enter a Stock Number and click on Save or Add Another. Either button will add the revised item to the list. Add Another clears the Edit Window so you can create more transactions while Save takes you back to the transaction list.

Clicking on the New Button to the right of the transaction list opens the same Transaction Window we just discussed. When we saw this window before the Sales Code (ME-01) had been filled in from the Standard Service, but when you enter a new transaction you will begin by specifying this code. In a new contract the first charge is normally of type SS-01, the Basic Services of Director and Staff. SS indicates Services Staff. The casket charge was an ME or Merchandise Item. Other types are SU (Services - Use of Facilities), SA (Services - Auto), SP (Services - Package), CA (Cash Advances), etc.

Stock provides a short cut for filling in all the other fields for this item. Click on the three dots to bring up the stock list for items matching the specified Sales Code.

Two taxable checkboxes are provided. Your State may not charge Sales Tax in which case you may ignore these checkboxes. If your State taxes some items and not others, check the Taxable1 box on the items subject to tax. Some States have more complicated tax rules which bring both checkboxes into use. By default Taxable 1 is checked for Merchandise items; you may change the default conditions of the Tax checkboxes by modifying the Sales Codes.

The Posted checkbox indicates whether the transaction has been sent to an integrated bookkeeping program. It is not normally necessary to check or uncheck this box manually.

Funding transactions go on that tab sheet. This is where you would enter deposits to trusts. While deposits may be added within the contract just as any other item, they may also be added using the

Payments Button that appears on the Find A Funeral Window when Search By is set to P/N Contracts.

Separate Buttons are provided to Delate and to Delete All. The first button deletes only the selected transaction which Delete All deletes all of the items in a single step.

The red arrows pointing up and down allow you to change the order of the transactions. Select a transaction and click on the up arrow to move it higher in the list or the down arrow to move it lower.

When you have entered all of your contract items, you add Sales Tax by clicking on the Sales Tax button at the top of the screen. This will add tax using the rates entered into the contract taking into account the checkboxes in the individual items. Interest transactions are also added using a button at the top of the screen.

6.5 Purchasers

Purchasers are entered within the preneed contract.

A contract may have more than one purchaser.

6.6 Funeral Detail

A fourth tab in the transaction area is labeled Funeral Detail. The same information appears in at-need and preneed contracts although the other tabs are labeled slightly differently depending up which module you are using.

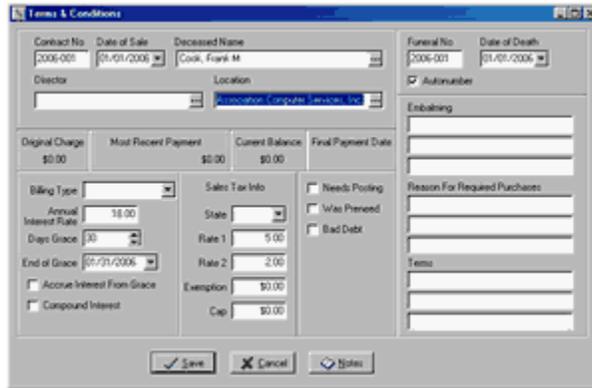
This tab provides access to some fields that are normally entered in LedgerPRO. These fields are used in reports. They may be accessed here if you find that more convenient or you do not own LedgerPRO.

6.7 Sales Tax

To add Sales Tax, click the Sales Tax button on the right hand side of the Original Charges tab sheet.

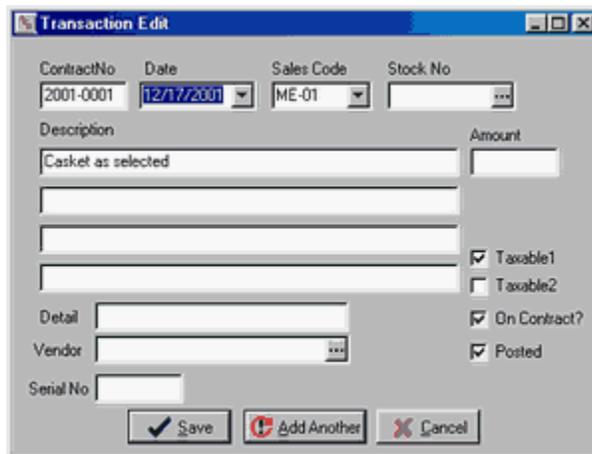


The rules for calculating Sales Tax are determined by the Contract and the individual items. The tax rates are specified in the Contract.



The Tax State is the two letter abbreviation for the State whose tax rules apply to this contract. Tax Rate 1 is the rate which will be applied to Items which have Taxable 1 checked. Tax Rate 2 will be applied to Items with Taxable 2 checked. Exemption and Cap are only needed in a few states so if these terms are unfamiliar, you probably should skip these fields.

The following screen shows a merchandise item with Taxable 1 checked.



By default Taxable 1 is checked for Merchandise items; you may change the default conditions of the Tax checkboxes by modifying the Sales Codes.

6.8 Billing

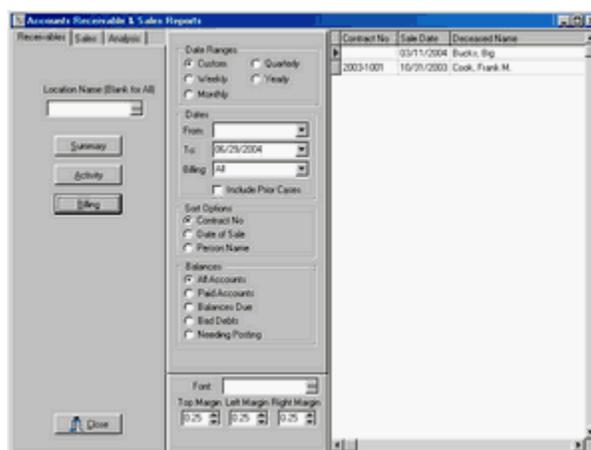
Two different buttons lead to billing. If you want to bill a single case, you would use the Billing Button at the top of the Contract Screen.



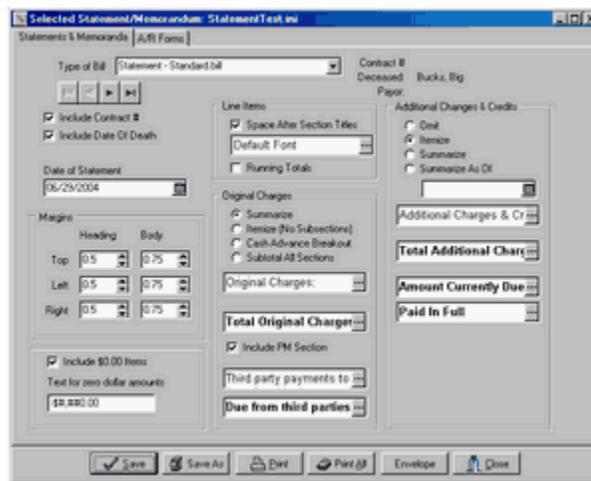
If you want to bill a batch of cases, you would first click on Report from the A/R PRO or P/N PRO Find a Funeral Screen.



Then you would use the screen that appears to identify the batch,



and then click on Billing. This brings up the same screen that appears when you select billing from the Contract Screen.



Several predefined Billing Formats are provided. Use the Type of Bill Field to select one.



Memorandums print the transactions from the Original Contract while Statement include the Additional Charges and Credits. We suggest you begin by printing out each of the predefined formats to see which you like best. As you do so, you will see that selecting a Type of Bill fills in the various fields in the Billing Screen.

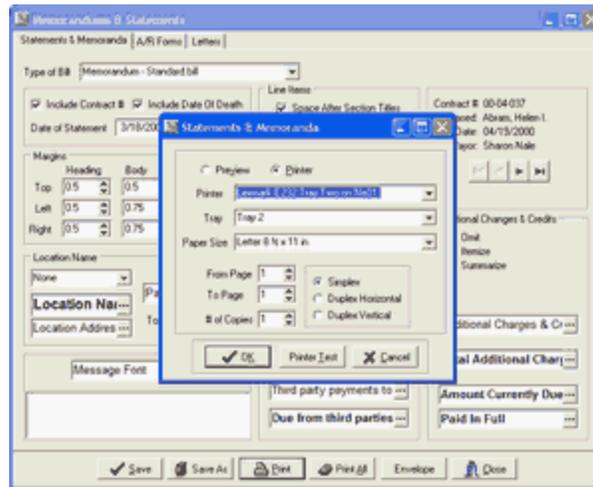
Below the margins fields, you will find a section headed Location Name. In our formats None has been selected which would be appropriate if you are printing on your letterhead. Of course, you may have to adjust the top margin to bring the printing down below your pre-printed heading. If you wish to print your bills on plain paper, you can change this field to print your main office name and address or the name and address of the particular location which handled this service. Clicking on the triple dots will allow you to change the fonts.



A message area is in the lower left hand corner. Several special key words are available for your use in messages. <date> will be replaced with the current date. <sold> will become the contract date. <grace> will become the date interest begins. <due> will become the current balance. <apr> will become the interest rate.

After you have selected a format (or formats) that you will use, you may change the fields and Save them or use Save As to give your own name to the modified format. For example, you might choose to use Save As to create a series of statements with messages of increasing severity to use as the case becomes older.

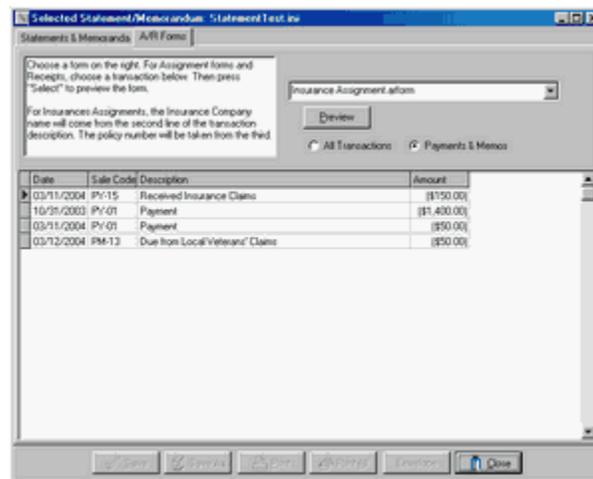
With the format selected, click on Print to bring up the Printer Dialog.



Set the Destination to Printer or Preview, set the tray and the number of copies, and click OK.

6.9 P/N Forms

A second tab under Billing is labeled A/R Forms. The same tab appears under at-need and preneed although the available forms differ.



Here you may print Insurance Assignments and Contracts (Statements of Goods & Services).

When you first come to this tab, Insurance Assignment will be selected. The assignment form assumes you have entered a transaction in the amount to be assigned. Click on the appropriate transaction from the list and select Preview.

To print a Statement of Goods and Services, select that form from the pull down list.



6.10 Sales Codes

The Sales Code Button at the top of the Contract Edit Screen allows you to modify the list of Codes.



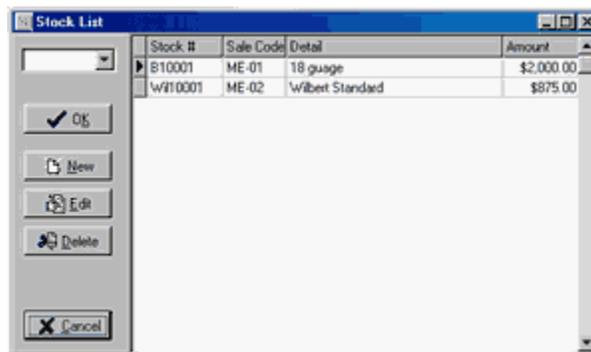
You may change the descriptions of the codes to suit your needs. We recommend you limit your changes to changing the wording leaving the basic meaning of each item unchanged.

You may also change the tax checkboxes to reflect the rules of your state. By default, service items have both tax boxes unchecked and merchandise items check Tax 1.

Up and down arrows are provided to allow you to move items up and down in the list. When transactions are added to a contract, they are inserted in the order provided here with Service Items first. Changing the order here changes where they will be inserted into new contracts. The order of existing contracts will not be affected.

6.11 Stock

The Stock Button at the top of the Contract Edit Screen allows you to create Stock Numbers.



When you click on New to add an item, you will be presented with a screen very similar to the transaction edit screen.

The screenshot shows a 'Transaction Edit' window with the following fields and values:

- Sales Code: ME-01
- Stock No: B10001
- Description: Casket as selected
- Amount: \$2,000.00
- Detail: 18 guage
- Vendor: Batesville Casket Company
- Serial No: (empty)
- Taxable1:
- Taxable2:

Buttons at the bottom: Save, Add Another, Cancel.

Stock numbers provide a convenient way to preenter your selections. Most people create stock numbers for their caskets and perhaps their vaults, but numbers can be created for items within any sales code. We recommend the use of stock numbers for all merchandise to facilitate more detailed reporting.

Note that all full four lines of description for each item are provided. The default descriptions provided in the Sales Codes are only one line long. For example, the default description for a casket is "Casket as Selected". If you prefer to present the family with a detailed description of the particular casket they choose, we suggest you enter the longer description into your Stock List.

The Detail field is where you put the description you use for the item internally. The above example shows "18 guage" in the detail field and "casket as selected" in the description field. You might have noticed that "18 guage" also appeared in the list of Stock Items which appeared earlier in this help item. Use the Detail field to help you identify the item to your staff and the long description field to identify the item for the family. The Detail field is used for reports while the Description field is used in billing.

6.12 Transfer Pneed to At-Need

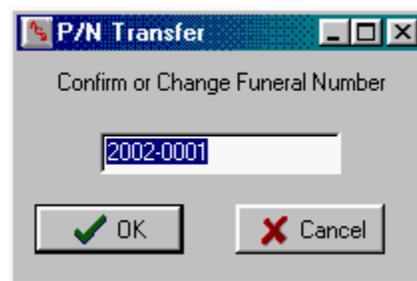
To transfer a Pneed Contract to At-Need, click on the Xfer P/N Button at the top of the Contract List.

The screenshot shows a grid of buttons:

New	Std Service	Billing	Sales Codes
Edit	Interest	Write Off	Stock
Delete	Post	Xfer P/N	Untransfer

You may perform this operation in P/N PRO and push the Contract over to A/R PRO, or you may perform the operation in A/R PRO pulling the Contract over from P/N PRO. There is also an Untransfer Button which will reverse the operation in case you transfer a contract by mistake.

When you transfer a Contract, you may change the Funeral Number if desired.

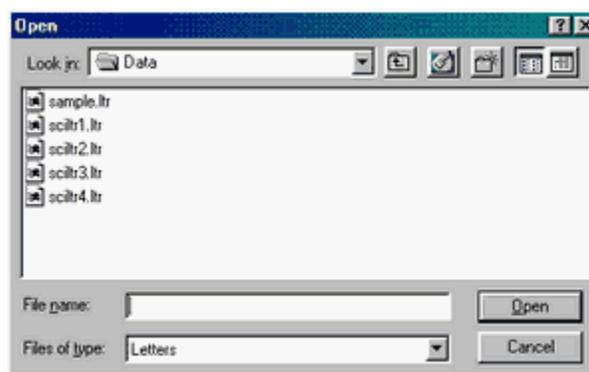


6.13 Letters

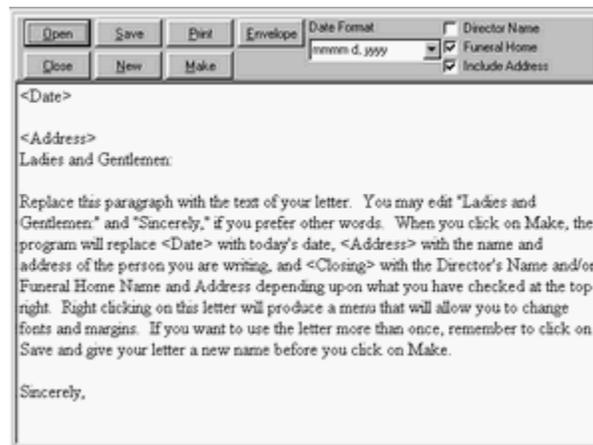
Letters may be printed from many places in the program. A Letters Button appears in the Address Book so that you can send a letter to anyone you have dealt with. Letters may also be sent to the Payors in a Contract. Pressing any Letters Button leads to:



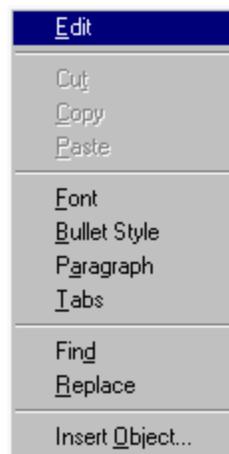
Click on Open to bring up the list of stored Letters.



We suggest you start by looking at sample.ltr although you will eventually want to look at the other letters which are designed for use in billing, too. When you open sample.ltr, you will return to the previous window.



As you can see, sample.ltr contains a basic letter format with instructions in the place of the body. Erase the body of the letter and replace it with your desired text. You may also change the formatting by clicking on the letter with your right hand mouse button to bring up a menu.

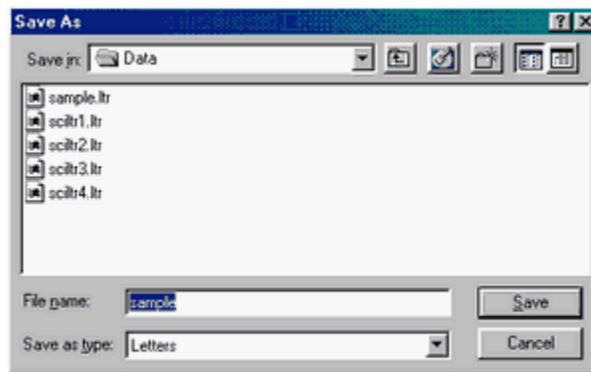


Choosing Edit from this menu will bring up an alternate editing screen with a toolbar. Choosing Font will let you change the font. Bullet Style will format a list of items. Paragraph will adjust margins and indentations. Tabs sets tabs.

As you see, sample.ltr includes structural items in brackets like <Date>. These are Tags. When you click on Make these tags will be replaced with data. <Date> becomes today's date. <Address> becomes the name and address of the person to whom the letter is being sent. Closing becomes the name of the person signing the letter. You may change the font to be used for the data by changing the font on the Tag. You may also move the tag. For example, if you want the date to be centered or right justified, you would highlight the tag, right click to bring up the menu, and then choose Paragraph. Use the drop down list and the check boxes at the upper right of the screen to format the <Date> and <Closing>, respectively.



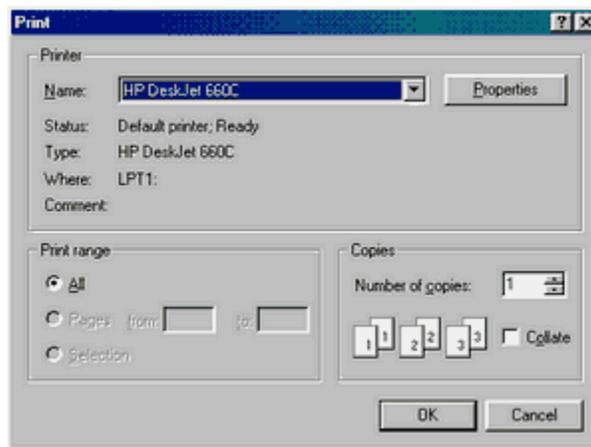
When the letter is to your satisfaction click on Save. Always save before using Make so that your Tags and not the instance data are saved.



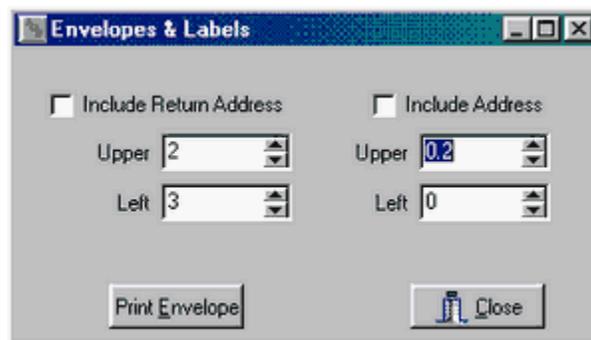
If you were to just click save at this point, you would overwrite the sample letter and lose the instructions. Also, when you next updated your program, your letter would be overwritten with our sample letter. So, change the name to something appropriate before saving.

New clears the screen so that you may type a fresh letter. Close does not close the current letter; it closes the entire letter writing process taking you back to the prior screen.

Print brings up the Windows printer dialog.



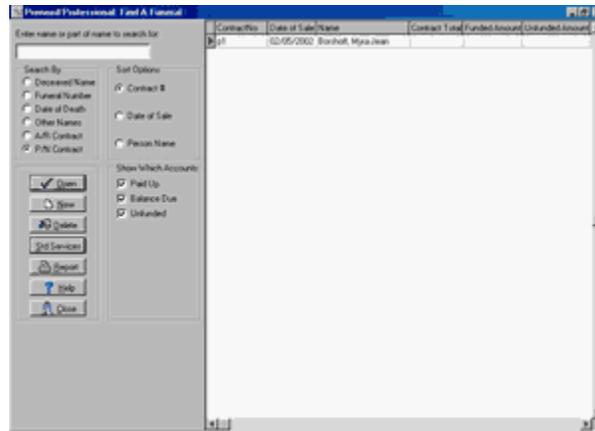
Envelope leads to a dialog



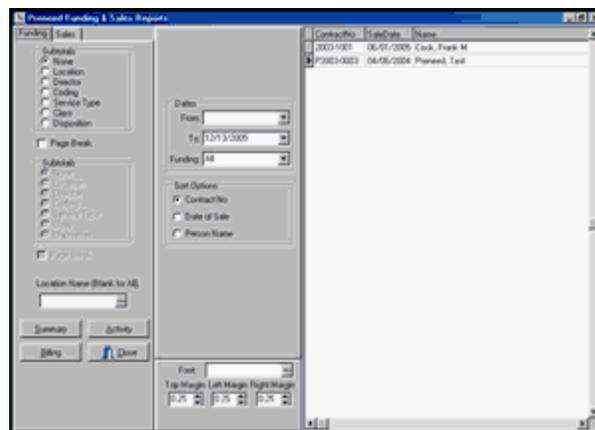
where you may position the addresses before printing.

6.14 Preneed Reports

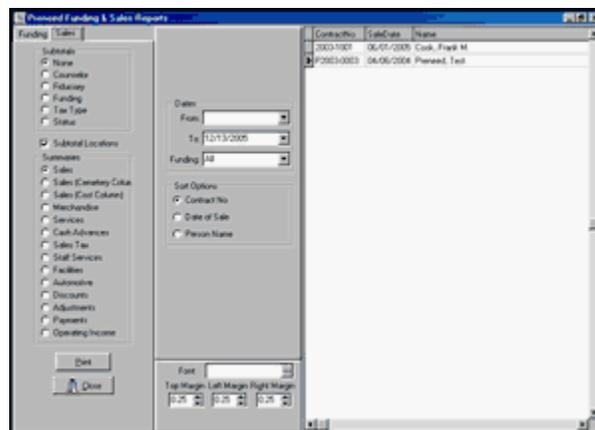
Preneed reports are printing by clicking on the Report Button on P/N PRO's Find a Funeral Screen.



Doing so produces the Report Menu.



Funding Reports provide information about the funding transactions from the cases you prearranged. For example, a report of this type might show amounts deposited to trust accounts.



Sales Reports provide information about the selections from the cases you prearranged in a certain

time period. The Sales Reports show the same kind of information you are used to seeing on an At-Need Sales Report such as casket sales.

7 PrintPRO

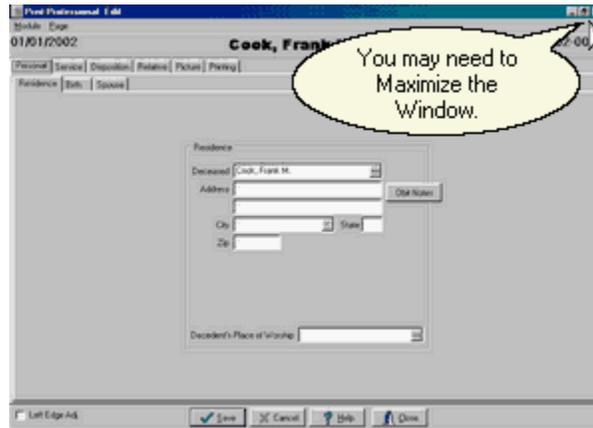
7.1 Overview

PrintPRO prepares memorial folders, prayer cards, acknowledgement cards, and register books. PrintPRO looks and works like LedgerPRO up until the point of printing when a different set of selections is presented.

When you chose PrintPro from the Main Menu, you will be taken to the Find a Funeral Window.

7.2 Personal Tab

The Personal Tab has 3 sub-tabs in PrintPRO and 4 in LedgerPRO.



When you first click on the Personal Tab, the Residence sub-tab will be displayed. The address information is displayed for your convenience; but you can not edit these fields. If you wish to change the deceased's residence information, you must click on the ellipsis to the right of the name field to bring up the Address Book.

Clicking on the Birth sub-tab displays information about the deceased's birth.



The dates of birth and death are displayed from the Address Book and the Age is automatically calculated for you from those dates.

Clicking on the ellipsis to the right of Father or Mother will open the Address Book.

Type in the City & State for Birth and Death. As you begin to type, the program will look for the letters in the List of cities. You can also click on the arrow symbol without typing to go directly to the list.

The third sub-tab is Spouse.

The name of the spouse is not actually entered here but it is displayed here for your convenience. The name is entered on the Relatives Tab using Husband or Wife as the Relationship. Here you may type in the Place and Date of Marriage if these are relevant to the documents you wish to print.

LedgerPRO adds a Misc sub-tab with additional fields that are relevant to government forms.

7.3 Service Tab

Clicking on the Service Tab displays:

The Funeral Home will be filled in from the information you supplied when you Created the Funeral. The Director's name on the left and the Place of Service on the right have ellipses which means they will be filled in from the Address Book.

In LedgerPRO, the Funeral Home and Director appear both on this page and the First Call Tab but the information is identical. In PrintPRO, there is no First Call Tab so the information must be entered here.

The Clergy and Music sections are Lists of People. The Date and Time fields are Masked.

This Tab includes several Notes fields. These fields allow you to type paragraphs of information for inclusion on your cards.

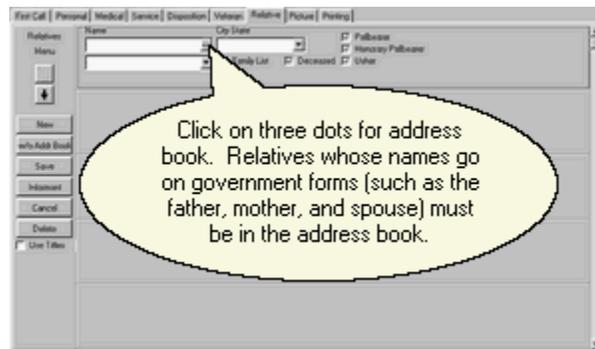
7.4 Disposition Tab

Clicking on the Disposition Tab displays:

The Cemetery is a Place. The Method of Disposition is a List. The Date and Time field are Masked. The Grave Location may simply be typed in. A Note field is provided for additional information concerning the disposition. Flowers and Shiva (special information for Jewish services) are also Note fields. Several Fields appear on this Tab in LedgerPRO that do not appear in PrintPRO.

7.5 Relatives Tab

People are entered into the Relatives list from this window.



When you click on New, a empty person record will be added to the top of the list and the Address Book will appear so that you can locate the name. Fill in the fields of the empty record as appropriate. The name field is a Person Field; however, if you want to find a person from the list but change the way the name appears for this case, you may do so. For example, you might want to find John Smith in the Address Book but change the name in your Relatives list to read Mr. and Mrs. John Smith.

You may also simply type in an entry without using your Address Book at all. For example, you might want to type in "3 Grandchildren" or "Several Nieces and Nephews" and you wouldn't want these phrases stored in the Address Book. To do this, either click on New to add a Relative and use Cancel to close the Address Book, or click on w/o Addr Book to add a record without bringing up the Book at all. The name of the spouse, mother, and father must be entered into the Address Book for use on government forms.

The relationship and city field are List Fields, and the remaining fields are Check Boxes.

Relatives are printed in the order they appear on this list which would initially be the order in which you chose to enter the names. However, the order may be changed. To move an entry, click on it and then click on the Red Up Arrow Symbol to move the name higher in the list or the Red Down Arrow Symbol to move it lower.

The Informant Button provides a quick way to copy the information for one of the family members to the Informant. Simply highlight the person who is to serve as the Informant and click on the button to copy the information to the First Call Tab. You may also do a similar operation in the other direction by first entering the Informant on the First Call Tab and then clicking a red arrow there to copy the information to the Family list.

7.6 Picture Tab

The Picture Tab communicates with TWAIN compliant scanners to acquire pictures. It also lets you manage Clip Art by moving the selector below the picture from Deceased Pic to Clip Art.

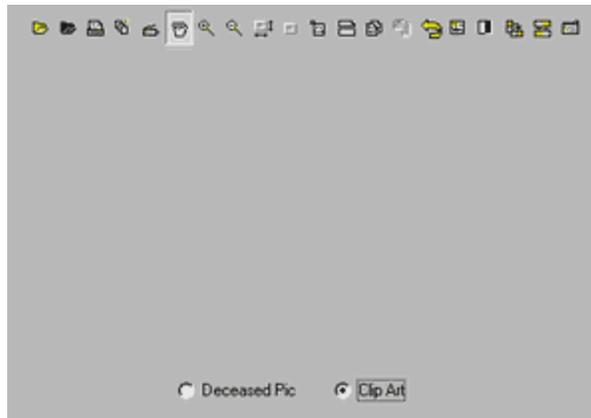


As you move your mouse over the icons, they will tell you what they do. For example, the first icon is for opening files. You would use this if the picture had already been scanned and was on your computer as a file. The second icon saves pictures to a file format. The program will save the pictures into a database and you do not need to also save them as a file unless you want to use them in other programs. The third icon will print the image. The fourth icon triggers your scanner while the fifth allows you to specify which scanner to use. Next are several icons that deal with zooming and the clipboard. Then there are icons to invert or rotate images. The final icon leads to the effect manager.

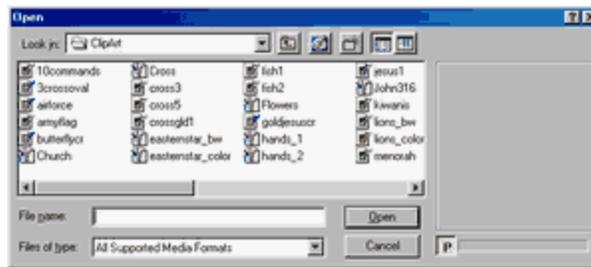


This screen provides advanced options to alter your picture. Some of the choices are fairly obvious in meaning; for example, Borders allows you to enclose your picture with a border and to specify its shape and color. Other choices are mysterious, and experimentation is the best way to learn what they do. We have included help topics written by the author of the effect manager (we purchased this part of the program from an outside company) which may be helpful if you wish to explore the advanced options.

Changing the selector to Clip Art produces:



Once again you have a row of controls. Clicking on the first icon will open folders.



This displays the images the Clip Art folder. It is not necessary to select the Art you wish to use here. This is the place where you work with your images. You could delete an image, rename it, or open it and use the controls to add effects. You use Advanced to control the actual image printed in a particular print job.

You can use the Scan Image Control to add images to this folder. You could also download images from the internet or purchase them on cd and place them into this folder.

7.6.1 Filters and Effects

Filters and Effects

On the Filters and Effects window select the name of the effect (the folder) you want to apply to the image. After you have modified the image, chose an option from the Filters and Effects Manager to save or discard your changes.

AutoContrast

Bleed

Borders

Border Fade

Blur

Bright

Color
Image

Mirror

Mosaic

Motion Blur

Noisify

Oil Paint

Page Curl

Paste

Color Palette

Dark

Despeckle

Edge Detection

Engrave

Enhance

Extrude

Gamma

Gray Area

Half Tone

Hue and Saturation

Invert

Jiggle

Pinch Hole

Polar

Rotate

Sharp

Soft

Spray

Tile Maker

Threshold

Transitions

Warp

Wave

WhirlPool

7.6.1.1 Auto Contrast

Auto Contrast

To create Auto Contrast effect click Correction | AutoContrast or select AutoContrast folder.
Follow direction on the folder.

Tip

The Auto Contrast effect will give you better contrast by making the darks darker and the lights lighter. In general, the Auto Contrast gives a good result when a simple contrast adjustment is needed to improve an image's contrast.

7.6.1.2 Bleed

Bleed

To create Bleed effect click Deformation | Bleed or select Bleed folder.
The easy way to Bleed the Image is to use the slider control to adjust the RGB Value between -255 to 255.

Tip

Bleed causes the image's color palette to expand depending on the value that you select. The Bleed is applied inside the image instead of outside the image. Use this when you want to intensify the colors of an image.

7.6.1.3 Borders

Borders

To create Borders effect click Image | Borders or select Borders folder.
Choose border shape from Shape list;
choose the thickness of the border by scrolling the Effects Manager bar ;
press the Use Mask Color button and choose border color.

7.6.1.4 Border Fade

Border Fade

To create fade effect click Image | Border Fade or select Border Fade folder.

Choose the size of the faded border you desire from Edge scroll bar ;

press the Use Custom Color button and choose the color you desire or use the color of this window.

Tip

You can fade the Image from the Border towards the center of the Image depending on the value selected from 1 to 300 .

7.6.1.5 Blur

Blur

To create blur effect click Deformation | Blur or select Blur folder.

Select the value of blur filter by scrolling the Value scroll bar.

Tip

The Blur filter softens any hard contrast in the parts of the image where significant color transitions occur.

The Blur filter smoothes transitions by averaging the pixels next to the hard edges of the defined lines and shaded areas. Begin by Blurring by small degrees at first, starting at value 10 to check for quality or desired effect.

7.6.1.6 Bright

Bright

To create bright effect click Correction | Bright or select Bright folder.

Select the value of bright filter by scrolling the Value scroll bar.

Tip

Using the Bright effect is the easiest way to make generalized adjustments to the tonal range of the image. Sliding towards the positive values adds light to the image.

7.6.1.7 Color

Color

To settle the color effect click Correction | Color or select Color folder.

Choose Color dithering method ;

choose Number of colors by sliding bar to value desired.

7.6.1.8 Palettes

Palettes

Only high cost video systems are able to simultaneously display every possible color at every location on the screen. Most video boards display a limited number of colors. About a megabyte of video memory is needed to support 256 colors. Because of the limited numbers of colors that can be shown at one time, video boards must keep track of which colors to use. The 256 colors that can be shown at one time are selected from a range of more than 16 million possibilities. That range of colors is determined by the video board's use of three bytes of

information to specify the red, green, and blue elements of color. Limiting the choices to 256 colors in the palette at one time cuts the memory needed down to one megabyte. In addition the color of a pixel can be changed by just specifying one byte of information, the new palette entry number. This is faster than specifying three bytes for the RGB value of every pixel.

Each image you display has its own logical palette. The system palette determines which color actually appears on your screen. When the application wants to activate its own color, it must load its own logical palette into the system palette.

If the image stored in 24 bit, that means in 16.7 million color resolution and you display it on the system which supports just 16 bit or less the OS will be confused what color to display. To adjust the page you convert the image to the system palette, to the colors which do not exceed 256.

7.6.1.9 Color Palette

Color Palette

To select the color [palette](#) Palettes effect, click Correction | Color Palette or select Color Palette folder.

Increase the color palette if it is suggested by the application.

Choose the color from Color Palette box or directly from the page (click on it).

Change the color by dragging R,G,B scroll boxes.

You can first Save Palette to File and then use this palette to apply to another images.

From drop-down list choose the method to change images and click Apply button.

7.6.1.10 Dark

Dark

To create dark effect, click Correction | Dark or select Dark folder.

Select the value of dark filter by scrolling the Value scroll bar.

Tip

Using the Dark effect is the way to make generalized adjustments to the tonal range of the image.

For example sliding towards the positive values adds blackness.

The color is reduced as darkness added.

7.6.1.11 Despeckle

Despeckle

To create despeckle effect, click Correction | Despeckle or select Despeckle folder.

Change the value in the Value scroll box.

Tip

This option allows the filling in of missing pixels on the color page. If the image has missing pixels on it, you can visually determine what value to choose, how many pixels around the missing one should be seen by application to achieve the correct color.

Bit resolution, or pixel fix, is a measurement of the number of bits of stored information per pixel. Bit resolution determines how much color information is available for each pixel in the file. Greater pixel fix means more available colors and more accurate color representation in the image.

7.6.1.12 Edge Detection

Edge Detection

To determine intensity of Edge Detection click Image | Edge Detection or select Edge Detection folder.

Choose a Value between 1 to 100 using the scroll box.

Tip

Use the Edge Detection effect to intensify outlines of high contrast while darkening areas of low contrast. You can set sensitivity of edge detection by value.

7.6.1.13 Engrave**Engrave**

To make an Engraved image, click Deformation | Engraved or select Engraved folder. Choose a Value on the slider control between 1 to 10.

Tip

The value from 1 and up to value 10 deletes the color and generalizes areas into high and low tones, the more the value, the thicker the Engraved line.

7.6.1.14 Enhance**Enhance**

To set Enhance filter, click Correction | Enhance or choose Enhance folder.

Tip

Use the Enhance filter to increase or decrease RGB values among areas of different colors and shades.

7.6.1.15 Extrude**Extrude**

To create extrude effect, click Deformation | Extrude or select Extrude folder. Select the value of extrude effect by scrolling the Value scroll bar.

Tip

Extrude - creates a waffle iron effect on the image. Extrude value allows you to monitor size of pyramid.

7.6.1.16 Gamma**Gamma**

To make Gamma correction, click Correction | Gamma or select Gamma folder. Select the value of gamma effect by scrolling the Value scroll bar.

Tip

In Gamma correction you can make gradual adjustments to the brightness or contrast of an image. Adjusting the gamma lets you change the brightness values of the middle range of gray tones without dramatically altering the shadows and highlights.

□

7.6.1.17 Gray Area

Gray Area

To apply gray area effect, click Image | Gray Area or select Gray Area folder.
Make selection and follow direction on the screen.

Tip

Gray effect can be applied to whole image,
It mixes the black and white to gray tone.

7.6.1.18 Half Tone

Half Tone

To create half tone, effect click Correction | Half Tone or select Half Tone folder.

Tip

Half tone, the reproduction of a continuous - tone image on a device which does not directly support continuous output.
This is done by displaying or printing a pattern of small dots which, from a distance, can meld optically to simulate the desired output color or intensity.
It is possible to change Pixel Angle and Cell size.

7.6.1.19 Hue and Saturation

Hue and Saturation

To create Hue and Saturation effect click Correction | Hue and Saturation or select Hue and Saturation folder.
Choose the color and change Hue, Saturation, and Bright value.

7.6.1.20 Invert

Invert

To create Invert effect, click Image | Invert or select Invert folder.

Tip

The Invert effect reverses the positive and negative areas of an image. You can use this effect to turn a positive into a negative or to create a positive image from a scanned negative.

7.6.1.21 Jiggle

Jiggle

To create Jiggle effect click Deformation | Jiggle or select Jiggle folder.
Choose the Shape of deformation and the value of Period or Amplitude.

Tip

The Period controls the squiggle and the Amplitude controls the stretch or pull effect sometimes doubling or tripling the image.

7.6.1.22 Mirror

Mirror

To create Mirror effect click Image | Mirror or select Mirror folder.
Choose the Vertical or Horizontal position of the image.

7.6.1.23 Mosaic

Mosaic

To create Mosaic effect click Deformation | Mosaic or select Mosaic folder.
Choose two of four different mosaic types, adjust the Size, Space, Light, Height appearance and Random position of mosaic cells.

Tip

The Mosaic effect groups pixels into different blocks.
The cell size is the width of a cell in pixels. The pixels in a given block are the same color, and the colors of the blocks represent the colors in the selection.

7.6.1.24 Motion Blur

Motion Blur

To create Motion Blur effect, click Deformation | Motion Blur or select Motion Blur folder.
Choose one of three Motion Groups: Motion Zoom, Motion Rotate, and Motion Line.

Tip

The Motion Blur effect blurs the image to reproduce a simulation of movement. The effect of this filter is analogous to taking a picture of a moving object with a fixed exposure time.
* Motion Zoom- blurs the edges of the border towards the center.
* Motion Rotate-blurs from the edge to center in a rotating fashion.

7.6.1.25 Noise Effect

Noise Effect

To create Noise effect, click Deformation | Noisify or select Noisify folder.
Choose the Red, Blue, and Green value to specify the appearance of random picked pixels on the image.
Choose the Gray value of Pixels to have only gray dots on the image.
Choose either Uniform or Gauss (more blur) method.

7.6.1.26 Oil Paint

Oil Paint

To create Oil Paint effect, click Deformation | Oil Paint or select Oil Paint folder.
Choose Value on the slider control between 1 to 100.

7.6.1.27 Page Curl

Page Curl

To create Page Curl effect click Deformation | Page Curl or select Page Curl folder.
On the Shading panel you have the choice to use:

the Foreground or Background color;
the shade under the curl;
the value of shading transparency.

On the Background panel you can choose to use Foreground color or background color.

You can choose to Keep the image under the curl.

On the Orientation panel you can choose the Vertical or Horizontal alignment of the curl.

On the Location panel you can choose the corner on which the curl will appear.

7.6.1.28 Paste Image

Paste Image

To create Paste Image effect, click Deformation | Paste Image or select Paste Image folder.

To paste the image from the file, select the location of the file and the image will automatically load

To paste the image from the clipboard, copy it to the clipboard and then press the button Paste Image From Clipboard.

To paste the image from the scanner, press the button Select Twain Source, then Acquire Image.

This executes the Twain Manager, provided by your twain device vendor, and acquires a single image.

7.6.1.29 Pinch Hole

Pinch Hole

To create Pinch Hole effect click, Deformation | Pinch Hole or select Pinch Hole folder.

To Pinch a Hole in the Image, use slider control. To adjust size of hole choose a Value between -20 to 0.

Tip

The Pinch Hole rotates the center of image so that the center disappears.

7.6.1.30 Polar

Polar

To create Polar effect, click Deformation | Polar or select Polar folder.

By Choosing Inverse, you can flip the image referring to the vertical line of symmetry.

By Choosing Backwards, you can flip the image referring to the horizontal line of symmetry.

By Changing the Angle value you can turn the image on given angle.

By Sliding the Value scroll box you are squeezing the image from the corners toward the center.

Tip

This effect gives a view of the image as if you are standing on the on North Pole and looking down.

7.6.1.31 Rotate

Rotate

To create Rotate effect, click Image | Rotate or select Rotate folder.

Press the Background Color button and choose the color.

Slide Angle scroll box and find desired value of angle.

Tip

The Rotate effect rotates the image according to the horizontal and vertical limits set in the Rotate dialog box. The rotation is applied as if the image were three-dimensional.

7.6.1.32 Sharp

Sharp

To create Sharp effect click Correction | Sharp or select Sharp folder.
Choose the value in the Value scroll box.

Tip

The Sharp effect provides more definition to blurry images by applying sharpening only when an edge is found. The Sharp effect preserves the overall smoothness of the image and focuses on only the edges.

7.6.1.33 Soft

Soft

To create Soft effect, click Correction | Soft or select Soft folder.
Choose the value in the Value scroll box.

Tip

The Soft effect provides the opposite of the Sharp effect. It smoothes the edges between the colors.

7.6.1.34 Spray

Spray

To create Spray effect, click Deformation | Spray or select Spray folder.
Choose the value in the Random and in the Value scroll boxes.

Tip

The Spray effect does not depend on the palette of the image. It randomly chooses colors.
The Spray effect applies the palette as if from a spray can.

7.6.1.35 Tile Maker

Tile Maker

To create Tile Maker effect, click Image | Tile Maker or select Tile Maker folder.

Tip

The Image is quartered and duplicates of each quarter are positioned at each corner. By using this effect, you can create a complete image in each corner of the image. The intersected areas may interfere with each other.

7.6.1.36 Threshold

Threshold

To create Threshold effect, click Image | Threshold or select Threshold folder.
Choose the value in the Value scroll boxes.
Choose the Anti-Aliasing effect if you wish to smooth the edges.

Tip

By choosing the Value you determine the Threshold. If the value of one of the RGB parts of the color is bigger than the value of the Threshold, then it transforms to a value of 255. If it less than the value of the threshold, it transforms the value to 0.
That means that the hue (red, green or blue) will transform into the pure color.

7.6.1.37 Transitions

Transitions

To create Transitions effect, click Transition menu or select Transition folder.

Choose the value in the Delay and in the Thickness scroll boxes.

Choose the transition effect, select the radio buttons:

- * None
- * Horizontal- Image is loaded using Horizontal bands.
- * Vertical - Image is loaded using Vertical bands.
- * Diagonal - Image is loaded by using bands from opposite corners.
- * Squares - Image is loaded to appear in a checkerboard pattern.
- * Rectangle - Image is loaded from border to center in bands.

Tip

Delay determines the speed.

Thickness determines the shape of the effect.

7.6.1.38 Warp

Warp

To create Warp effect, click Deformation | Warp or select Warp folder.

Change the value of ScaleFac to smear pixels of the image.

Change the value of Displacement Scaling factor to enlarge the distance between the pixels.

Change the Vector Rotate value to select the direction of the rotating.

7.6.1.39 Wave

Wave

To create Wave effect, click Deformation | Wave or select Wave folder.

Change the value of Wave Length, Phase, and Amplitude by sliding the scroll box indicator.

Choose the Smear Waves to smooth the edges between colors.

Tip

Waves spread out from the center of the selected area to the periphery.

Setting Wave Length, Phase and Amplitude gives the length and phase and amplitude of the wave.

This effect recreates an image which looks as if a stone is thrown into a pond.

7.6.1.40 WhirlPool

WhirlPool

To create WhirlPool effect click Deformation | WhirlPool or select WhirlPool folder.

Choose the value in the Value scroll box.

Tip

WhirlPool effect rotates the pixels of the image around the center of a selected area.

7.6.2 Filters and Effects Manager

Filters and Effects Manager

[Hide Selection](#)

Reset Selection
Reload
Preview
Apply
Stop
Close and Save
Close and do not Save
Save Setting on Exit

7.6.2.1 Hide Selection

Hide Selection

The Hide Selection makes the selected area invisible.

If you wish not to see the [selected area, the Rubberband](#) Selected_area_the_Rubberband , press the button Hide Selection.

7.6.2.2 Selected area, the Rubberband

Selected area, the Rubberband

The selected area is the rectangle where the effect may be applied.

7.6.2.3 Reset Selection

Reset Selection

Press Reset Selection button to choose another selected area.

7.6.2.4 Reload

Reload

Press Reload button to change the image after it had been previewed.

The previous image which was in memory will appear.

7.6.2.5 Preview

Preview

Press Preview button if you would like to see a preview of how the effect will look.

In this case the changed page will not be stored in the main memory.

7.6.2.6 Apply

Apply

Press Apply button to store the effect to the master image.

After you have applied the image, you will no longer be able to load the original image.

7.6.2.7 Stop

Stop

While applying the effect you can press Stop button to stop process of image's transformation. It will be the cause the program to recover the original image as quickly as possible.

7.6.2.8 Close and Save

Close and Save

Press Close and Save button to close Filters and Effects window. Now you can see the effect which has been applied to the image and saved to memory. The Thumbnails will be marked as "changed".

7.6.2.9 Close and do not Save

Close and do not Save

Press Close and do not Save to close Filters and Effects window. You can see that the effect has not been saved in the memory.

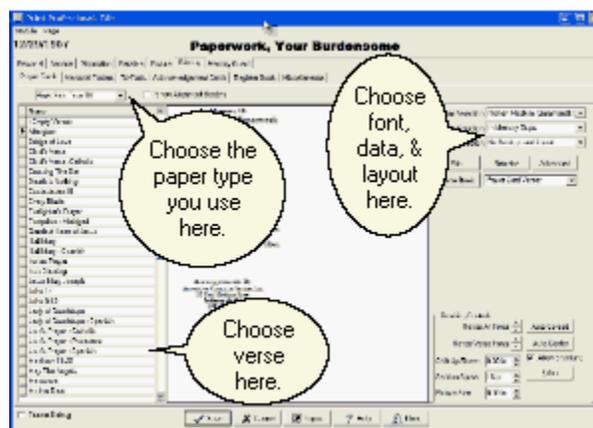
7.6.2.10 Save Setting on Exit

Save Setting on Exit

Click File | Save Setting on Exit to keep the Filters and Effects window unchanged. Next time you open the Filters and Effects window, the same folder will be opened, with the same size of the selected area, and the same size of the window.

7.7 Prayer Cards

When you click on the Printing Tab, the Prayer Card sub-tab will be displayed.



Show Alignment Borders is a Check Box. Placing a check here will cause boxes to print around your cards. You wouldn't normally do this when you were actually printing to your Prayer Card Stock, but sometimes the boxes are useful when you print to a plain piece of paper or wish to adjust margins.

The List field that initially displays "Both Sides Tear Off" is the Paper Size List. All of the popular variations of 8 up prayer cards are on the list. In addition there is a Custom Card Size choice which

when selected allows you to use the Card Stock Button at the right of the screen to specify a custom configuration.

Below the Card Size list is the Verse List. Double clicking on the name of the verse will incorporate it into your card - unless you've chosen a Data Set without a Verse. It is best to select your Font, Data, and Layout Sets before choosing your verse. To add your own verses to the list, click on Verse Book.

The Select Fonts List allows you to choose the Font Set, Select Data chooses the Data Set, and Select Layout chooses the Layout. We have pre-configured a number of Sets that we think are attractive but you may create more using the Advanced Button.

Fonts Sets are described with names like Old English Small(OldEnglish) or Bold-Old English Small(Opulent Bold-OldEnglish). In the first example, all of the printing is in an Old English font in a small size. Normally you would want a small size for Prayer Cards unless your verse was very short. The program will shrink a large font to avoid overflowing a card but will not expand a small font; it does, however, adjust spacing between sections to even out white space. The second OldEnglish in parentheses is the actual name of the font. In the second example, two fonts are listed. The first font, Bold, indicates the font for headings while the second font, Old English, is for the data. In parentheses we see that the actual name for what we are calling Bold is Opulent Bold.

Data Sets are described with names like In Memory Of, In Memory Of - Picture Top, and Name. In Memory Of is our standard layout. In Memory Of - Picture Top includes the picture from the picture page at the top. Name includes only the name of the deceased and would normally be used over a background on the front side of a card.

Layout sets are described with names like No Background, and Background. If you are printing the inside of a card, you would normally choose the No Background Layout. However, selecting a Background will allow you to print the outside of the card if you are starting with a plain piece of paper. Choosing a Background would also be appropriate if you were producing a memorial tribute rather than a traditional prayer card.

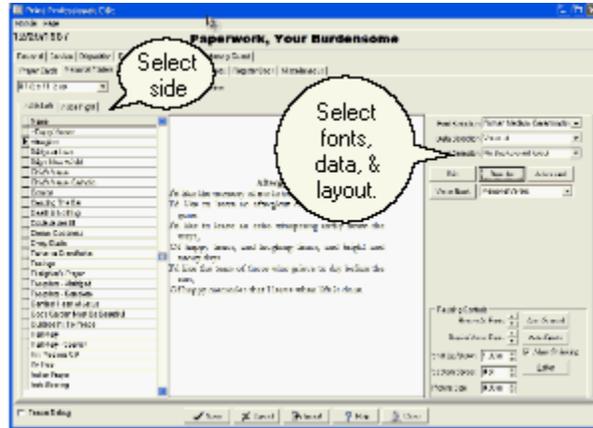
Do not use a Data Set that includes a picture when you choose a Layout Set with a Background. If you want to have a picture of the deceased appear over a background, choose a Data Set with just text and choose a Layout Set with both a background and a foreground picture. Adjust the Text Margins and the Foreground Picture position so that the text and the picture do not overlap. Checking Show Alignment Borders will draw boxes to aid in making these measurements.

When you return to a Funeral, the window will display the card as you last printed it. You will be able to print more by simply clicking on Print. If you've made changes in the data though, you'll first need to click on the Remake Button to have the program recreate the card with the changed data. Changing Items on this windows such as the Font Set will also cause the card to remake. Some care needs to be exercised here though. While the program will display the card exactly as it was printed (it saves an image of the card), the program does not know the name of the verse you selected or the values of the List Fields you chose and so these items may not correspond to the actual saved card. In fact, they will correspond to the last funeral you worked on rather than the saved funeral which is normally a convenience in entering new funerals which may trip you up if you aren't careful. So you'll need to make sure these items are as you want them before you click on Remake.

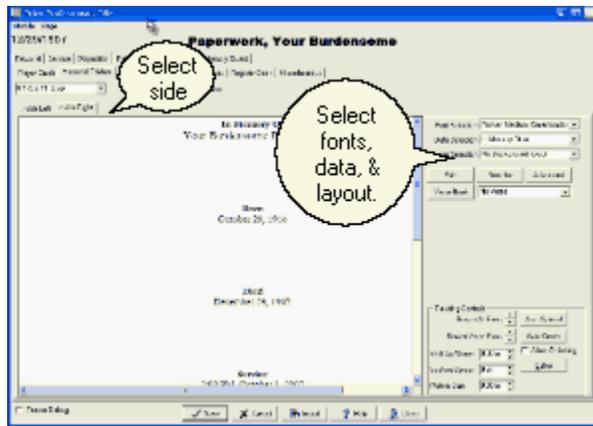
The Resizing Controls allow you to fine tune the spacing. When the card is as you wish, click Print and the Printer Window will appear.

7.8 Memorial Folders

When you click on the Memorial Folders sub-tab under the Printing Tab, the Inside Left sub-sub tab will be displayed.



The Inside Right window is very similar.



Show Alignment Borders is a Check Box. Placing a check here will cause boxes to print around your cards. You wouldn't normally do this when you were actually printing to your Memorial Folder Stock, but sometimes the boxes are useful when you print to a plain piece of paper or wish to adjust margins.

The List field that initially displays "8 1/2 x 11 2-up" is the Paper Size List. All of the popular variations of memorial folders are on the list. In addition there is a Custom Card Size choice which when selected allows you to use the Card Stock Button at the right of the screen to specify a custom configuration.

The Verse List will appear on the left unless the Verse Type Selector is set to "No Verse." Double clicking on the name of the verse will incorporate it into your card - unless you've chosen a Data Set without a Verse. It is best to select your Font, Data, and Layout Sets before choosing your verse. To add your own verses to the list, click on Verse Book.

The Select Fonts List allows you to choose the Font Set, Select Data chooses the Data Set, and Select Layout chooses the Layout. We have pre-configured a number of Sets that we think are attractive but you may create more using the Advanced Button.

Fonts Sets are described with names like Old English Small(OldEnglish) or Bold-Old English

Small(Opulent Bold-OldEnglish). In the first example, all of the printing is in an Old English font in a small size. Normally you would want a medium size for the Inside Right. The length of your verse, or the size of your picture, will determine whether to use a medium a small or even a large on the Inside Left. Good design suggests using the same fonts on both sides but not necessarily the same size. The program will shrink a large font to avoid overflowing a card but will not expand a small font; it does, however, adjust spacing between sections to even out white space. The second OldEnglish in parentheses is the actual name of the font. In the second example, two fonts are listed. The first font, Bold, indicates the font for headings while the second font, Old English, is for the data. In parentheses we see that the actual name for what we are calling Bold is Opulent Bold.

Data Sets are described with names like In Memory Of, In Memory Of - Picture Top, Name, and Verse. In Memory Of is our standard data set for the right side. In Memory Of - Picture Top includes the picture from the picture page at the top. Name includes only the name of the deceased and would normally be used over a background on the front side of a card. Verse is the standard data set for the left side.

Layout sets are described with names like No Background, and Background. If you are printing the inside of a folder, you would normally choose the No Background Layout. However, selecting a Background will allow you to print the outside of the folder if you are starting with a plain piece of paper. Choosing a Background would also be appropriate if you were producing a memorial tribute rather than a traditional memorial folder.

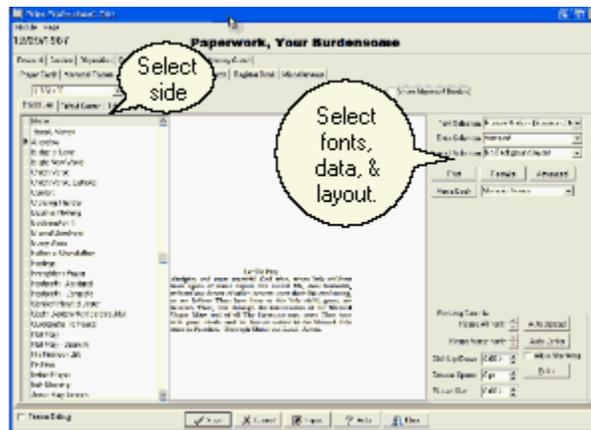
Do not use a Data Set that includes a picture when you choose a Layout Set with a Background. If you want to have a picture of the deceased appear over a background, choose a Data Set with just text and choose a Layout Set with both a background and a foreground picture. Adjust the Text Margins and the Foreground Picture position so that the text and the picture do not overlap. Checking Show Alignment Borders will draw boxes to aid in making these measurements.

When you return to a Funeral, the window will display the folder as you last printed it. You will be able to print more by simply clicking on Print. If you've made changes in the data though, you'll first need to click on the Remake Button to have the program recreate the folder with the changed data. Changing Items on this windows such as the Font Set will also cause the card to remake. Some care needs to be exercised here though. While the program will display the folder exactly as it was printed (it saves an image), the program does not know the name of the verse you selected or the values of the List Fields you chose and so these items may not correspond to the actual saved folder. In fact, they will correspond to the last funeral you worked on rather than the saved funeral which is normally a convenience in entering new funerals which may trip you up if you aren't careful. So you'll need to make sure these items are as you want them before you click on Remake.

The Resizing Controls allow you to fine tune the spacing. When the card is as you wish, click Print and the Printer Window will appear.

7.9 Tri-Folds

When you click on the Memorial Folders sub-tab under the Printing Tab, the Tri-Fold Left sub-sub tab will be displayed.



The Tri-Fold Center and Tri-Fold Right sub-sub tabs are identical to the Tri-Fold Left sub-sub tab.

Tri-Folds are currently designed to print landscape on letter sized paper. If you need to use a different paper size, let us know and we will add a paper-size selector.

Show Alignment Borders is a Check Box. Placing a check here will cause boxes to print around your folders. You wouldn't normally do this when you were actually printing to your Memorial Folder Stock, but sometimes the boxes are useful when you print to a plain piece of paper or wish to adjust margins.

The Verse List will appear on the left unless the Verse Type Selector is set to "No Verse." Double clicking on the name of the verse will incorporate it into your card - unless you've chosen a Data Set without a Verse. It is best to select your Font, Data, and Layout sets before choosing your verse. To add your own verses to the list, click on Verse Book.

The Select Fonts List specifies the Font Set, Select Data specifies the Data Set, and Select Layout specifies the Layout Set. We have pre-configured a number of Sets that we think are attractive but you may create more using the Advanced Button.

Fonts Sets are described with names like Old English Small (OldEnglish) or Bold-Old English Small (Opulent Bold-OldEnglish). In the first example, all of the printing is in an Old English font in a small size. Normally you would want a medium size for the Inside Right. The length of your verse, or the size of your picture, will determine whether to use a medium a small or even a large on the Inside Left. Good design suggests using the same fonts on both sides but not necessarily the same size. The program will shrink a large font to avoid overflowing a card but will not expand a small font; it does, however, adjust spacing between sections to even out white space. The second OldEnglish in parentheses is the actual name of the font. In the second example, two fonts are listed. The first font, Bold, indicates the font for headings while the second font, Old English, is for the data. In parentheses we see that the actual name for what we are calling Bold is Opulent Bold.

Data Sets are described with names like Verse - Picture (Top). Selecting a Data Set with more information suggests using a smaller size Font Set. Which data set you use on each tab, may depend upon how you plan to fold the paper.

Layout sets are described with names like No Background, and Background. If you are printing the inside of a folder, you would normally choose the No Background Layout. However, selecting a Background will allow you to print the outside of the folder if you are starting with a plain piece of paper. Which tabs will be on the inside and which will be on the outside, depend entirely upon how you choose to fold the paper.

Do not use a Data Set that includes a picture when you choose a Layout Set with a Background. If you want to have a picture of the deceased appear over a background, choose a Data Set with just text and choose a Layout Set with both a background and a foreground picture. Adjust the Text Margins

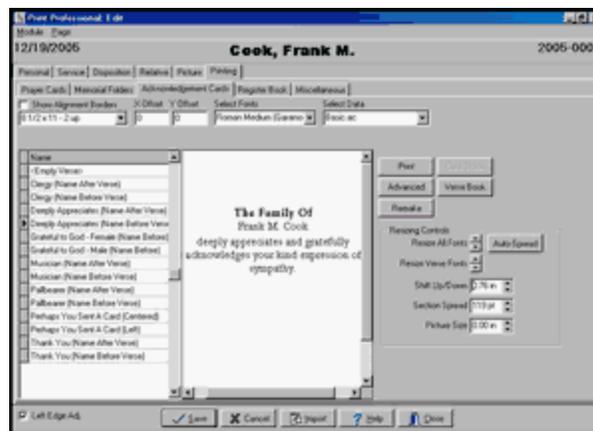
and the Foreground Picture position so that the text and the picture do not overlap. Checking Show Alignment Borders will draw boxes to aid in making these measurements.

When you return to a Funeral, the window will display the card as you last printed it. You will be able to print more by simply clicking on Print. If you've made changes in the data though, you'll first need to click on the Remake Button to have the program recreate the card with the changed data. Changing Items on this windows such as the Font Set will also cause the card to remake. Some care needs to be exercised here though. While the program will display the card exactly as it was printed (it saves an image of the card), the program does not know the name of the verse you selected or the values of the List Fields you chose and so these items may not correspond to the actual saved card. In fact, they will correspond to the last funeral you worked on rather than the saved funeral which is normally a convenience in entering new funerals which may trip you up if you aren't careful. So you'll need to make sure these items are as you want them before you click on Remake.

The Resizing Controls allow you to fine tune the spacing. When the card is as you wish, click Print and the Printer Window will appear.

7.10 Acknowledgement Cards

When you click on the Acknowledgement Card sub-tab of the Printing Tab, this window will be displayed.



Show Alignment Borders is a Check Box. Placing a check here will cause boxes to print around your cards. You wouldn't normally do this when you were actually printing to your Acknowledgement Card Stock, but sometimes the boxes are useful when you print to a plain piece of paper or wish to adjust margins.

The List field that initially displays "8 1/2 x 11 - 2 up" is the Paper Size List. All of the popular variations of acknowledgement cards are on the list. In addition there is a Custom Card Size choice which when selected allows you to use the Card Stock Button at the right of the screen to specify a custom configuration.

Below the Card Size list is the Verse List. Double clicking on the name of the verse will incorporate it into your card - unless you've chosen a Data Set without a Verse. It is best to select your Font and Data Set before choosing your verse. To add your own verses to the list, click on Verse Book.

The X and Y Offsets move the print on the page. X is for left or right and Y is for up and down. You may move left or up from zero with negative numbers. The offset is in inches, but you shouldn't need to use any offset unless your cards are slightly off size and then small adjustments like .10 or .005 should be sufficient.

The Select Fonts List specifies the Font Set and Select Data specifies the Data Set List. We have preconfigured a number of Sets that we think are attractive but you may create more using the Advanced Button.

Fonts Sets are described with names like Old English Small(OldEnglish) or Bold-Old English Small(Opulent Bold-OldEnglish). In the first example, all of the printing is in an Old English font in a small size. Normally you would want a large size for Acknowledgement Cards unless your sentiment is very long. The program will shrink a large font to avoid overflowing a card but will not expand a small font; it does, however, adjust spacing between sections to even out white space. The second OldEnglish in parentheses is the actual name of the font. In the second example, two fonts are listed. The first font, Bold, indicates the font for headings while the second font, Old English, is for the data. In parentheses we see that the actual name for what we are calling Bold is Opulent Bold.

Data Sets are described with names like Name After Verse. Some verses are designed for the name to follow it and some expect the name to come first. Be sure to select a Data Set with the name in the right place for the verse you chose.

When you return to a Funeral, the window will display the card as you last printed it. You will be able to print more by simply clicking on Print. If you've made changes in the data though, you'll first need to click on the Remake Button to have the program recreate the card with the changed data. Changing Items on this windows such as the Font Set will also cause the card to remake. Some care needs to be exercised here though. While the program will display the card exactly as it was printed (it saves an image of the card), the program does not know the name of the verse you selected or the values of the List Fields you chose and so these items may not correspond to the actual saved card. In fact, they will correspond to the last funeral you worked on rather than the saved funeral which is normally a convenience in entering new funerals which may trip you up if you aren't careful. So you'll need to make sure these items are as you want them before you click on Remake.

The Resizing Controls allow you to fine tune the spacing. When the card is as you wish, click Print and the Printer Window will appear.

7.11 Register Books

When you click on the Register Book sub-tab of the Printing Tab, this window will be displayed.



Show Alignment Borders is a Check Box. Placing a check here will cause boxes to print around your cards. You wouldn't normally do this when you were actually printing to your Register Book Card Stock, but sometimes the boxes are useful when you print to a plain piece of paper or wish to adjust margins.

The List field that initially displays "6.5 x 9" is the Paper Size List. Both of the standard book sizes are

on the list. In addition there is a Custom Card Size choice which when selected allows you to use the Card Stock Button at the right of the screen to specify a custom configuration.

The Select Fonts List specifies the Font Set and Select Book specifies the Book Set List. We have preconfigured a number of Sets that we think are attractive but you may create more using the Advanced Button. Actually there are two Advanced Buttons for Register Books. On the left is a Button for the Book which lets you name the pages to be included, and on the right is a Button for the selected Page which lets you define the information that appears on it.

Fonts Sets are described with names like Old English Small(OldEnglish) or Bold-Old English Small(Opulent Bold-OldEnglish). In the first example, all of the printing is in an Old English font in a small size. Normally you would want a extra large size for Register Books. The program will shrink a large font to avoid overflowing a card but will not expand a small font; it does, however, adjust spacing between sections to even out white space. The second OldEnglish in parentheses is the actual name of the font. In the second example, two fonts are listed. The first font, Bold, indicates the font for headings while the second font, Old English, is for the data. In parentheses we see that the actual name for what we are calling Bold is Opulent Bold.

The predefined Books are Blank Pages, Centered Titles, and Left Titles. Blank Pages prints the entire page including the Title at the top. Centered Titles assumes that the top heading is centered and centers the data below it. Left Titles assumes that the top heading is at the left and aligns the data to the left as well. All of these sets are for "computer interiors". If you have books that have preprinted lines for typewriters, you should contact your book company and ask about exchanging the pages for computer interiors. Most suppliers will do this at no charge.

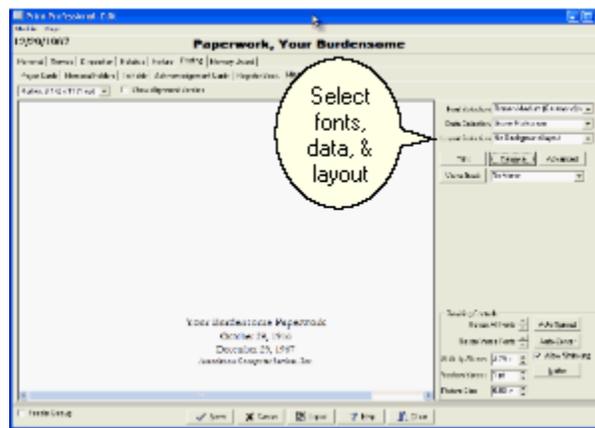
Do not use a Data Set that includes a picture when you choose a Layout Set with a Background. If you want to have a picture of the deceased appear over a background, choose a Data Set with just text and choose a Layout Set with both a background and a foreground picture. Adjust the Text Margins and the Foreground Picture position so that the text and the picture do not overlap. Checking Show Alignment Borders will draw boxes to aid in making these measurements.

When you return to a Funeral, the window will display the book as you last printed it. You will be able to print more by simply clicking on Print. If you've made changes in the data though, you'll first need to click on the Remake Button to have the program recreate the card with the changed data. Changing Items on this windows such as the Font Set will also cause the card to remake. Note that there are two Remake Buttons, one for the whole book and one for the selected page.

The Resizing Controls allow you to fine tune the spacing. When the book is as you wish, click Print. You may print the whole book by clicking on the Print button in the left column or a single page by clicking in the right column and the Printer Window will appear.

7.12 Miscellaneous

When you click on the Miscellaneous sub-tab of the Printing Tab, this window will be displayed.



Show Alignment Borders is a Check Box. Placing a check here will cause boxes to print around your cards. You wouldn't normally do this when you were actually printing to your forms, but sometimes the boxes are useful when you print to a plain piece of paper or wish to adjust margins.

The List field that initially displays "8 1/2 x 11 - 1 up" is the Paper Size List. The list includes sizes appropriate for signs, grave markers, and book marks. In addition there is a Custom Card Size choice which when selected allows you to use the Card Stock Button at the right of the screen to specify a custom configuration.

The Select Fonts List specifies the Font Set, Select Data specifies the Data Set, and Select Layout specifies the Layout Set. We have preconfigured a number of Sets that we think are attractive but you may create more using the Advanced Button. Be sure to select Font, Data, and Layout Sets appropriate to your particular job. Different Data Sets have been provided for the various paper types used on this Tab. Also, you will want to select a Font Set with an appropriate size.

Fonts Sets are described with names like Old English Small(OldEnglish) or Bold-Old English Small(Opulent Bold-OldEnglish). In the first example, all of the printing is in an Old English font in a small size. Normally you would want a large size for a Sign but a small size for a bookmark. The program will shrink a large font to avoid overflowing a card but will not expand a small font; it does, however, adjust spacing between sections to even out white space. The second OldEnglish in parentheses is the actual name of the font. In the second example, two fonts are listed. The first font, Bold, indicates the font for headings while the second font, Old English, is for the data. In parentheses we see that the actual name for what we are calling Bold is Opulent Bold.

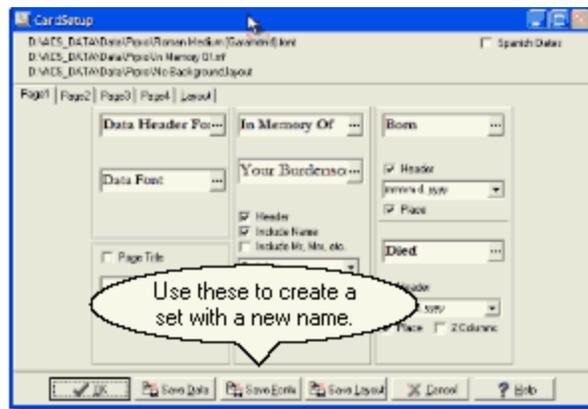
Layout sets are described with names like No Background, and Background. Do not use a Data Set that includes a picture when you choose a Layout Set with a Background. If you want to have a picture of the deceased appear over a background, choose a Data Set with just text and choose a Layout Set with both a background and a foreground picture. Adjust the Text Margins and the Foreground Picture position so that the text and the picture do not overlap. Checking Show Alignment Borders will draw boxes to aid in making these measurements.

When you return to a Funeral, the window will display the card as you last printed it. You will be able to print more by simply clicking on Print. If you've made changes in the data though, you'll first need to click on the Remake Button to have the program recreate the card with the changed data. Changing Items on this windows such as the Font Set will also cause the card to remake. Some care needs to be exercised here though. While the program will display the card exactly as it was printed (it saves an image of the card), the program does not know the name of the verse you selected or the values of the List Fields you chose and so these items may not correspond to the actual saved card. In fact, they will correspond to the last funeral you worked on rather than the saved funeral which is normally a convenience in entering new funerals which may trip you up if you aren't careful. So you'll need to make sure these items are as you want them before you click on Remake.

The Resizing Controls allow you to fine tune the spacing. When the card is as you wish, click Print and the Printer Window will appear.

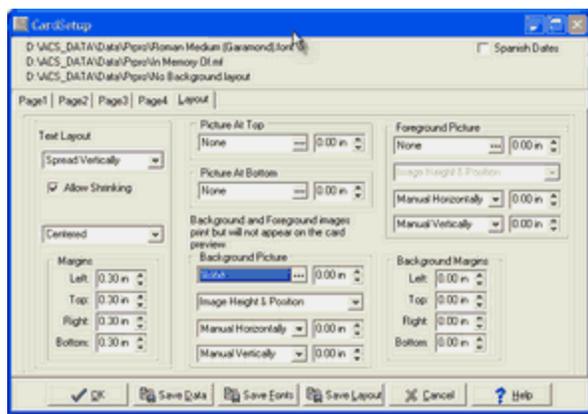
7.13 Advanced

When you click on Advanced in any of the printing sections of PrintPRO, a screen something like this will appear.



Here you may change the words that are used for titles, control what data appears, and specify fonts. A check box at the top of the page allows you to specify that dates will be formatted in Spanish.

An important feature allows you to change the way the items will be spaced on the page. These controls are on the last tab in Advanced which is labeled Layout.



A selector in the upper left hand corner of the page lets you choose from three types of vertical spacing for the text. Centered Vertically locates the text a little above center as we think this is more pleasing to the eye than using the exact center. Spread Vertically adjusts the spacing between sections to fill the entire space. Choosing Manual Spacing causes two additional fields for the Top Offset and Spacer size to appear. The next selector allows you to choose whether the text will be centered horizontally or aligned to the left or right margin. As this is written, Acknowledgement Cards are all centered horizontally, but this may have changed by the time you read this as we plan to add the horizontal spacing control everywhere.

The choices you make in the Text Layout section of this page are all stored in your Data Set. The second column allows you to specify whether there will be a picture at the top or the bottom. These settings are also part of the data set and the pictures you select will be part of your preview.

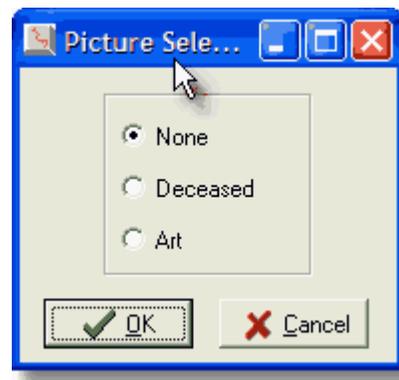
The remaining items on this tab store in the Layout Set. The margins set at the bottom of the first column define the area in which the text will appear. You will probably not need to change Margins on Prayer Cards or Memorial Folders unless you are using a background image or your printer is clipping the output near the edges of the paper. All printers have an area at each edge of the paper in which they can not print. To determine whether you need to adjust the margins to compensate for your printer's unprintable area, print a job on plain paper with the Show Alignment Borders Box checked. If the printer has cut off the boxes that show the text area, adjust the margins until all sides of all of the boxes print. The program fits the text into the margins defined here so counter-intuitively it may be necessary to define a bigger rather than a smaller bottom margin to keep keep your printer from clipping the bottom edge.

With Acknowledgement Cards and Register Books, adjusting margins is the preferred way to deal with pages with panels or borders. You might want to bring down the top margin to clear a pre-printed heading, or bring in one side margin to clear a border, or both side margins to shorten the lines of text in your verse.

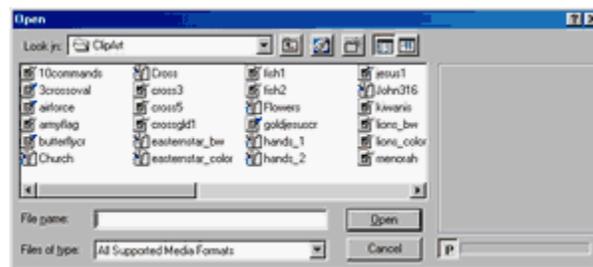
The Advanced section also allows you to specify pictures and clip art and set their sizes. You can separately specify pictures at top or bottom using fields that look like:



When you click on the 3 dots at the right of these fields, you will see



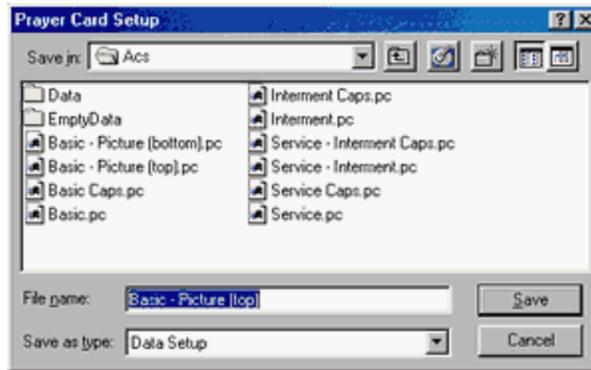
Select None and click OK for no picture. Select Deceased and click OK for a picture of the Deceased. Select ClipArt and click OK to bring up the screen to choose your Clip Art.



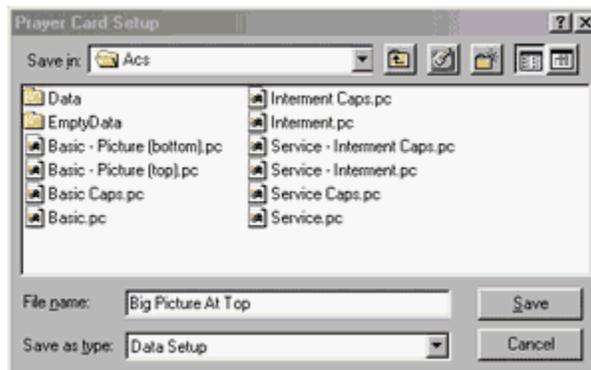
Click on the image of your choice to highlight it, and then click Open to copy the name of your image into the picture field.

A word of caution is required. If you select say Basic and Roman Small and make changes here and exit by simply clicking on OK, you will be changing the Sets we defined for you. If later you install an update, your changes will be lost. The solution is to save your changes into a new Set with a name of

your choosing. Say for example you wish to make a special Set with a larger than normal picture without losing your regular setup. The best way to do this is to first choose a Data Set with a picture, say Basic - Picture (top), click Advanced, change the Pic Height as you wish and click on Save Data to bring up the Setup screen.



If you simply hit save, it would overwrite your existing file and we don't want that. So first choose a new file name like Big Picture At Top and type it in the File name box. It would be a good practice to select names that are distinct from the names we use. Good choices might be Frank's Big Picture At Top or CookFH Big Picture At Top.



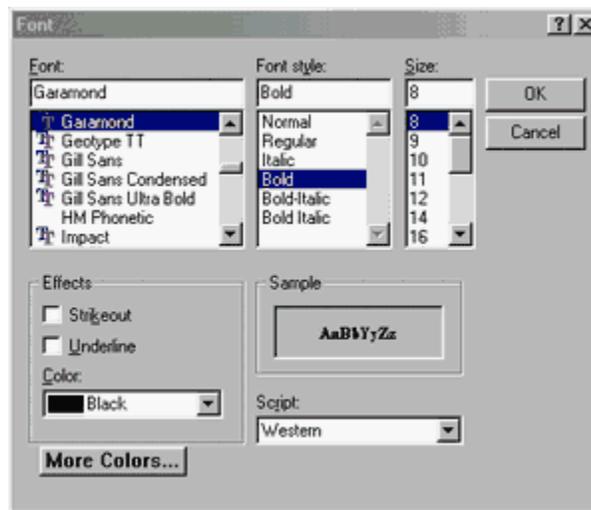
Now when you click on Save and return to Advanced you will see that the Selected Data Set has changed to your new name.



Then when you click on OK to close the Advanced Screen you will see that your new Data Set has been added to the Select Data List and is available to be selected in the future without having to go into Advanced at all.



A similar procedure would allow you to make a new font set. In advanced, click one of the ellipses to bring up a Font selector dialog to change the font for the field you selected.

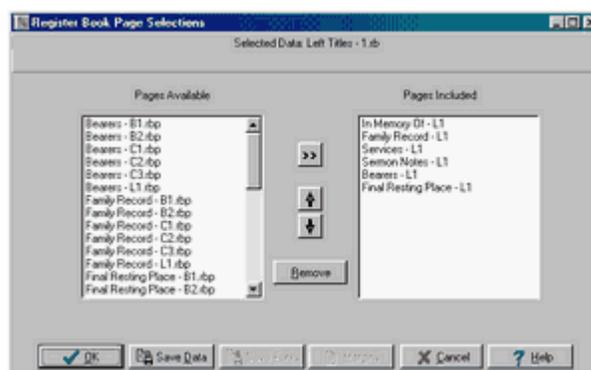


All of the fonts installed on your computer will appear in the list. You may also specify a Color other than Black and you can even click on More Colors to bring up a Custom Color Dialog to exactly match the color of a particular ink.

A similar procedure allows you to create your own layout sets. The layout sets store whether there will be a background or foreground picture. These pictures are distinct from the basic one that appears in the text. A background picture will be behind the text. A foreground picture will be in front of the background. Neither of these pictures appear with the text in the preview.

Do not use a Data Set that includes a picture when you choose a Layout Set with a Background. If you want to have a picture of the deceased appear over a background, choose a Data Set with just text and choose a Layout Set with both a background and a foreground picture. Adjust the Text Margins and the Foreground Picture position so that the text and the picture do not overlap. Checking Show Alignment Borders will draw boxes to aid in making these measurements.

The Register Books Tab contains two Advanced Buttons. The Advanced Button on the right is for adjusting what appears on a particular page. It operates just like the Advanced Buttons on the other tabs. The Advanced Button on the left is for adjusting what pages appear within a given book layout.



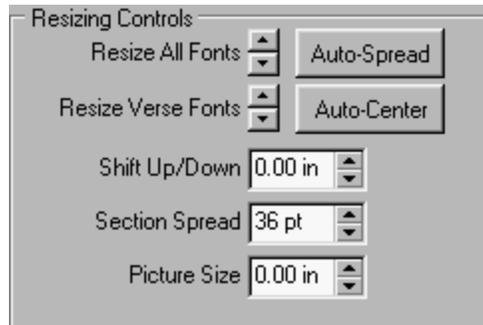
To add a page to the Book, highlight it on the left and click on the >> key to move it to the right. To remove a page from the Book, highlight it on the right and click on Remove. The up and down arrow keys allow you to reorder the pages.

If you use a particular customized Register Book layout, you will want to use the SaveData feature to save your Book and Pages under a unique name so that they will not be overwritten when you update

the program. This is a three step process. First, use the SaveData under Page Advanced to save each page to a new name such as "In Memory Of - MyFuneralHome." Second, use the SaveData under Book Advanced to create a new Book name such as "MyRegisterBook." Finally, use the controls in Book Advanced to remove the standard pages from the list of included pages in MyRegisterBook and to replace them with the MyFuneralHome pages.

7.14 Resizing Controls

After the program has created your card, you may use the resizing controls to adjust the spacing. The values which initially appear in these fields reflect the spacing choices made in Advanced.

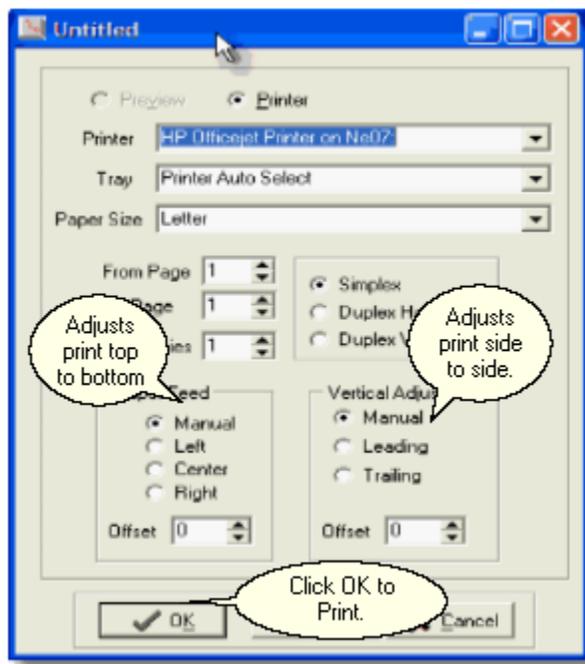


Be aware that the initial layout created by the program is likely to fill the available space. This means that if you wish to use the controls to increase font sizes, you will need to reduce the section spread and vice versa. The Auto-Spread and Auto-Center buttons recalculate and reset the numbers in the controls for the top spacing and the section spread. You might use one of these buttons after changing the font or picture size.

Some cards have two pictures. The picture control normally adjusts the top picture. However, if you click on the bottom picture, the picture size control will switch and adjust the bottom one.

7.15 Printer Adjustments

When you click on Print the first time, the Printer Window appears with your default printer selected and Copies set to 1.



If necessary you may change the printer, tray, or paper size. Otherwise, simply click on OK to print your first sheet of cards. If you have not yet purchased the program, a message may appear warning you that the chosen funeral home location is unregistered. Do not be concerned about this message. It simply means that Sample will be printed on your output until we issue you a registration number on purchase. Click on OK in this warning.

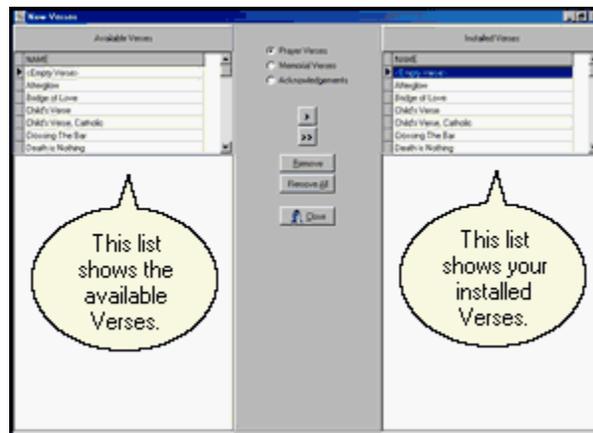
After the first printing, the program will remember the printer you used previously rather than the Windows Default Printer. The program remembers separately the printer you last used for Prayer Cards, Memorial Folders, etc.

The Paper Feed setting moves the print on the page from side to side. The Vertical Adjustments moves the print on the page from top to bottom. If you are using a full letter sized form, it should not be necessary to change these settings. You will only change these settings when your paper is less than a full 8.5" wide or 11" tall.

Some printers feed narrow paper by leaving the left edge stationary and having a single slider on the right that moves in to hold the paper in place. Other printers have two sliders to feed the paper in the center. Still others keep the right edge stationary. Choose Left, Center, or Right depending upon your printer. Manual enables the Offset spin edit in the unlikely event you need to enter a more precise adjustment.

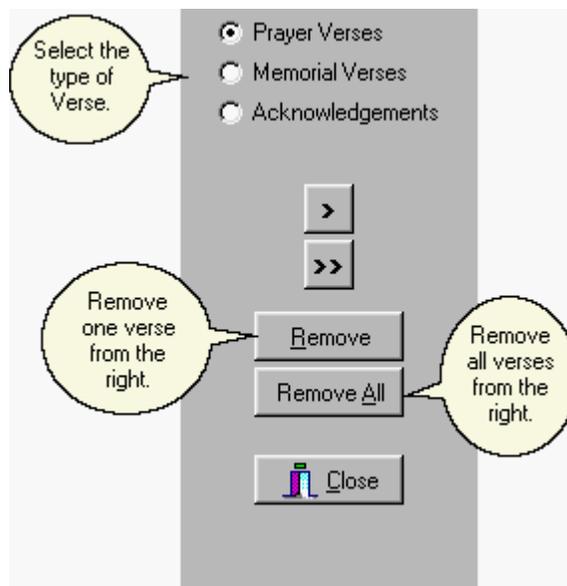
Some printers print on short paper as if missing paper is at the Leading edge of the sheet while others act as if the missing paper is at the Trailing edge. Vertical Adjustment compensates for this difference by moving the print from top to bottom. Again, Manual enables the Offset spin edit in the unlikely event you need to enter a more precise adjustment.

Note that when we say top to bottom or side to side, we mean with respect to the direction the paper is moving through the printer and not as you look at the finished product. Prayer Cards print landscape (sideways in the printer) which means that while the Vertical Adjustment is in the direction of the paper travel, it will move the print side to side as you look at the finished cards. Memorial Folders print portrait and there Vertical Adjustment moves top to bottom as you look at the finished cards. We have found a number of printers that require the Vertical Adjustment to be set on Trailing for Prayer Cards and Leading for Memorial Folders. While this sounds complicated, once you have these settings the way you want them, the program will remember them for the next time.

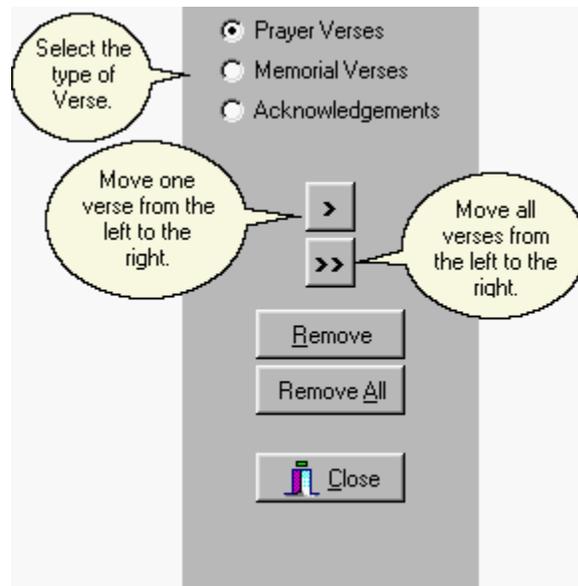


The Verse Book was created when you first installed the program. Since that time, you may have added your own custom verses or removed or modified some of the verses that were originally installed. You may have also installed updated versions of the program with new Verse Book files; however, that installation did not over-write your modifications. Instead, the latest version of the Verse Book was copied to a different location on your hard disk: the EmptyData Folder. The Master List displays the Verses from the EmptyData Folder on the left, and the Verses from the Data Folder on the right. Controls in the center allow you move Verses from the left to the right thereby making them available for use.

You can not have two verses with the same name so before you can add a Verse you may need to remove one. Controls in the center allow you to remove one Verse or All Verses. First use the radio buttons at the top of the center selection to choose to display Verses for Prayer Cards, Memorial Folders, or Acknowledgment Cards.



To remove all the installed verses to start over, click on **Remove All**. To remove a single verse from the list of installed verses, first click on the desired verse in the right hand list to highlight it and then click on **Remove**.



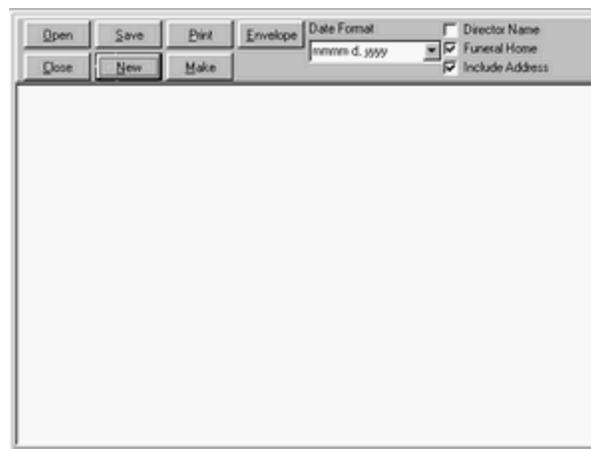
If you chose to remove all of the Verses from the right, you can replace them all from the left by clicking on the double arrow symbol (>>). To add a single verse, first click on it in the left hand list so that it is highlighted, and then click on the single arrow symbol (>).

You can use the Master List to accomplish several purposes. You might want to remove a custom verse you entered for a particular family. You might want to remove Spanish Verses if you do not serve that community. You might want to add a Verse that we have added after your original installation. You might want to remove the installed version of a Verse and reinstall our latest version of the same Verse. You might even want to reinstall the <Empty Verse> if you turned it into a custom verse before you learned how to add a new verse for that purpose.

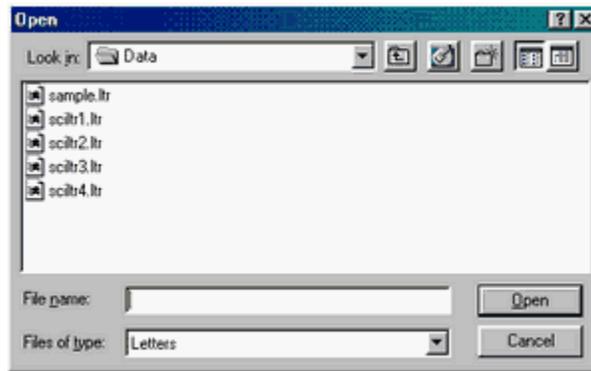
Clicking on Close with return you to the Verse Book.

7.17 Letters

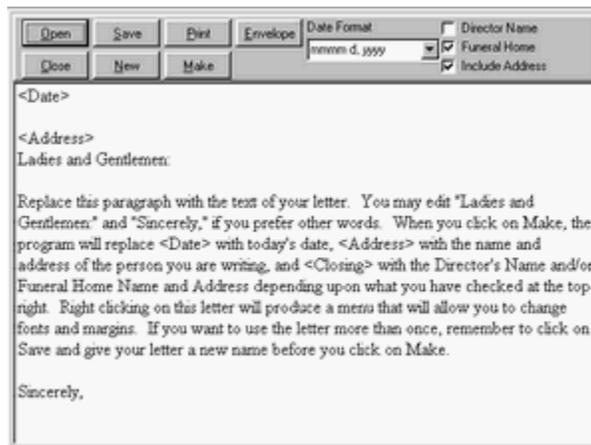
Letters may be printed from many places in the program. A Letters Button appears in the Address Book so that you can send a letter to anyone you have dealt with. Letters may also be sent to the Payors in a Contract. Pressing any Letters Button leads to:



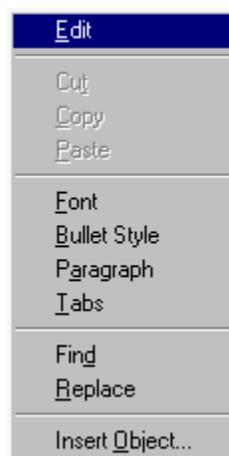
Click on Open to bring up the list of stored Letters.



We suggest you start by looking at sample.ltr although you will eventually want to look at the other letters which are designed for use in billing, too. When you open sample.ltr, you will return to the previous window.



As you can see, sample.ltr contains a basic letter format with instructions in the place of the body. Erase the body of the letter and replace it with your desired text. You may also change the formatting by clicking on the letter with your right hand mouse button to bring up a menu.



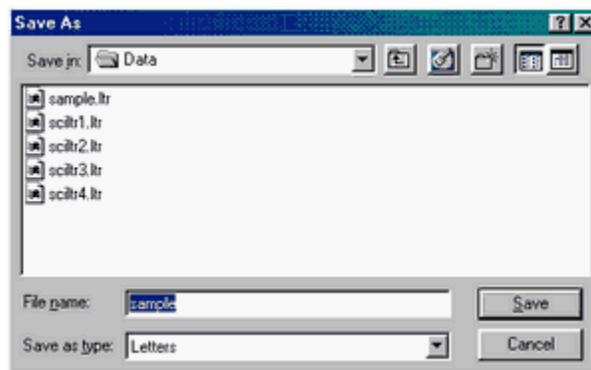
Choosing Edit from this menu will bring up an alternate editing screen with a toolbar. Choosing Font will let you change the font. Bullet Style will format a list of items. Paragraph will adjust margins and

indentations. Tabs sets tabs.

As you see, sample.ltr includes structural items in brackets like <Date>. These are Tags. When you click on Make these tags will be replaced with data. <Date> becomes today's date. <Address> becomes the name and address of the person to whom the letter is being sent. Closing becomes the name of the person signing the letter. You may change the font to be used for the data by changing the font on the Tag. You may also move the tag. For example, if you want the date to be centered or right justified, you would highlight the tag, right click to bring up the menu, and then choose Paragraph. Use the drop down list and the check boxes at the upper right of the screen to format the <Date> and <Closing>, respectively.



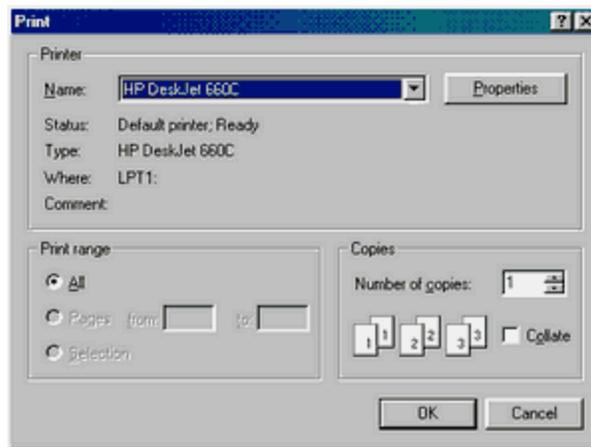
When the letter is to your satisfaction click on Save. Always save before using Make so that your Tags and not the instance data are saved.



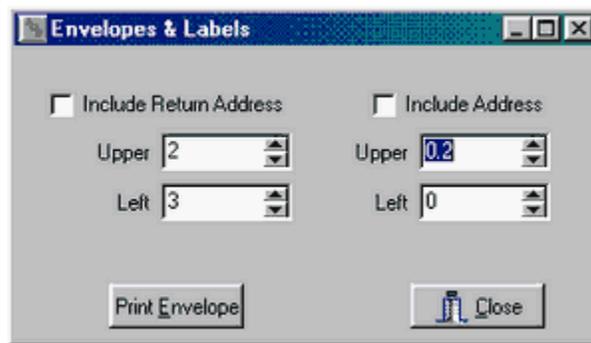
If you were to just click save at this point, you would overwrite the sample letter and lose the instructions. Also, when you next updated your program, your letter would be overwritten with our sample letter. So, change the name to something appropriate before saving.

New clears the screen so that you may type a fresh letter. Close does not close the current letter; it closes the entire letter writing process taking you back to the prior screen.

Print brings up the Windows printer dialog.



Envelope leads to a dialog

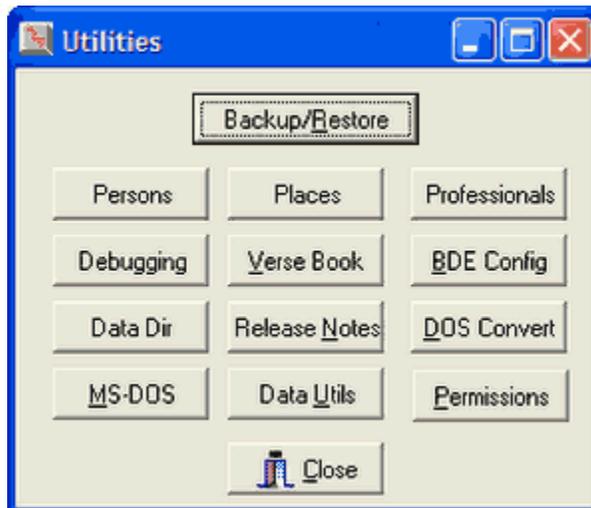


where you may position the addresses before printing.

8 Utilities

8.1 Overview

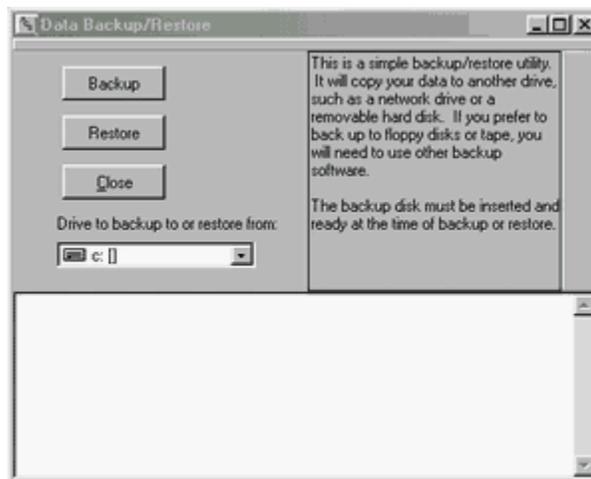
When you select Utilities from the Main Menu, you open the Utilities Menu.



Backup/Restore is a basic option to save your data. Persons, Places, and Professionals all allow you to do maintenance on your Address Book without having to go into a case. Debugging, BDE Config, MS-DOS, Data Utils, and DOS Convert would normally only be used with the aid of a support technician. Permissions allows you to create a security system to control access to the program.

8.2 Backup/Restore

This is a basic backup and restore program which simply copies your data to or from another drive. It is useful if you have a removal drive such as a Zip or Zap drive or if you have a Local Area Network. If you have a tape backup system, you would use the software that came with the tape instead of or in addition to this utility.



Click on the arrow to the right of the drive symbol to bring up a list of available drives. The click on Backup to copy your data to that drive or on Restore to copy data on that drive back over your program. You should not choose Restore unless there is something wrong with your working data as it will overwrite your data with the copy from the other drive.

8.3 Address Book

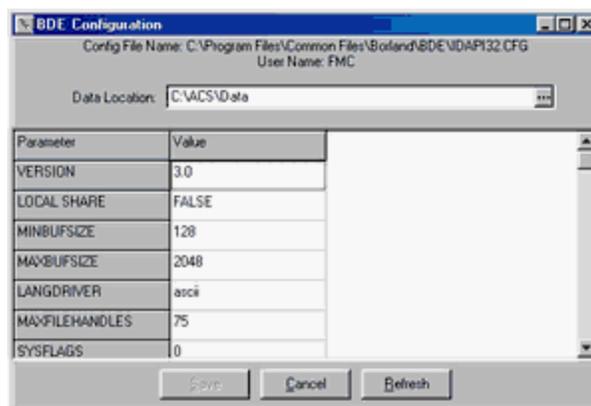
The Address Book Utility allows you to work on your lists of Names and Places without calling up a funeral. Specify whether you want to work on your list of People, Professionals, and Places and then you may Add, Delete, or Edit the names on that list. You may also print Letters from the Address Book.

8.4 Debugging

This option is provided for our support technicians. It allows them to turn on some testing features to help them diagnose problems.

8.5 BDE Config

The BDE Config Utility allows you to alter the settings of the Borland Database Engine. You would not normally alter these settings unless instructed to do so by the ACS Support Department.



Network users will have occasion, however, to change the Data Location. When you install the program, the Data Location will be set to a Data Folder underneath the Folder in which you chose to install the program. If you are on a large or Wide Area Network, you may choose to actually install the program on every workstation as well as on the server. In that case, you would change the Data Location in this window from every workstation so that it points to the Data on the server. Our preferred method of network installation, however, is to install the program onto the server again and again from each workstation. That will allow the installation program to create icons and configure the BDE properly on each workstation so that you do not need to change anything here.

8.6 MS-DOS

This utility allows you to leave the program and "shell out" to an MS-DOS prompt. It is normally only used by support technicians and advanced users.

8.7 Data Utils

Several data utilities are provided. It is good practice to backup before performing any data utility.



Upgrade is a routine operation performed after you have installed a new version of the program. It makes any changes that may be necessary in the data base structures because of changes in the program.

Pack Data removes the space taken by deleted records from your files. It is good practice to Pack periodically.

Reindex repairs the index files for your data.

Clear Prpro empties the files that stores images of your prayer cards, etc, and your picture file. It does not empty the underlying data so it is possible to remake the cards if you know what verse was used. If you print pictures on your cards, the image file can become big quickly and that can cause problems. This utility will first ask you if you want to clear out data files. Yes will clear the files that store the previews. A second question will ask if you also want to clear the picture file. Yes will erase all of the pictures from your old cases. You should click No on this second question if you are not experiencing trouble on the Picture Tab. If you aren't experiencing problems, it is probably sufficient to choose to Pack the Data rather than Clear these files.

The other utilities would normally only be used if directed to do so by an ACS support technician.

8.8 DOS Convert

This utility will convert data from earlier versions of Arranger. It is in final testing. If you would like a conversion program for some other funeral home software program, call us and we will investigate the feasibility and cost.

8.9 Permissions

For security reasons, the first two steps in setting up a system of permissions require a call to ACS Support. We will change your registration code to enable the security system feature and give you a password which will allow you to create the first users. Once security has been enabled, a Log On screen will appear whenever you start the program.



A drop down list will allow you to select the User from the names you have defined. You will not be able to enter the program until you have correctly entered the password for that User.

Users are created and their powers are defined by selecting Permissions from the Utilities Menu. The first time you attempt to access Permissions no users will have yet been defined so Support will give you a special password good for that day only which will allow entry.



You should first create a Master User with access to the entire program. Enter a name and password for this User, click on the Check All Button to give this User all the possible permissions, and click on Save. The Master User can be given any name you wish. You could call it Administrator, but you do not have to do so. You may use your own name.

Blank passwords will not be saved. The program will not limit your choice of a password, but you should be aware that the most secure passwords are a combination of letters, numbers, and symbols. Using your birthday, your phone number, your child's name, your pet's name, your favorite football team, or any other password that people who know you are likely to guess, is not secure. A trick some people use to create a password that is both secure and easy to remember is to replace some of the letters in a word with numbers. For example, you might spell dog with a zero instead on an o. Of course, your actual password should be more complex.

Next enter a name and password for another user, click on the Clear All Button to uncheck the permissions, check on only the permissions you wish this user to have, and then click on Save. Do not check the Security box for any User other than the Master User. Any user who has Security checked can access the Permission screen and give themselves additional access.

The bold faced boxes with the module names, LedgerPro, AR Pro, etc., control access to the entire module. If a user does not have one of these boxes checked, he will not be able to access that module at all. For example, if you wanted a particular user not to be able to access AR Pro, you would not check that box. If you want the user to be able to access the module but to limit the things he can do within the module, you would check the bold faced box for that module but leave some or all of the boxes underneath the bold faced box unchecked. For example, you might choose to check the AR Pro box for a certain user but not check the Reports box underneath the AR Pro box which would allow the particular user to use the module but would block their access to AR Reports.

If a User attempts to access a part of the program to which he does not have access, the Log On screen will reappear. The Master User could then grant one time access by entering the Master User name and password. If you forget your Master password, ACS Support can give you special password good for that day only which will allow you to create a new password; however, for obvious reasons, we will only give these passwords to the owner of the firm.

9 Trouble Shooting

Table Unavailable Because of Previous Error

This error message indicates a problem with an index. Choose Utilities, Data Utilities, and Re-Index.

Blob Error or Corrupt File Message

These error messages are normally followed by a file name of containing either prpro or rb (If the file name is not prpro or rb and it ends in mdx, the corrupt file is an index file and you should Re-Index.). Choose Utilities, Data Utilities, and Clear Prpro. You will answer the first question yes but you can say no to the second question about deleting picture files. If that does not solve your problem, try the process again saying yes to the second question about picture files.

Clicking on Remake in PrintPRO Does Not Produce a Preview

The preview file is probably corrupt. Choose Utilities, Data Utilities, and Clear Prpro. You will answer the first question yes but you can say no to the second question about deleting picture files.

A Scanned Picture Does Not Appear on the Picture Tab

The picture file is probably corrupt. Choose Utilities, Data Utilities, and Clear Prpro. You may say no to the first question about deleting data files, but you will need to say yes to the second question about deleting picture files.

Field-Id missing

If you have recently installed an upgrade, this error may mean you failed to run a necessary upgrade utility. If not, it is probably a false error generated by a corrupt preview file and you should follow the instructions above for clearing Prpro.

Unable to Find Working Directory

If you are on a network, this is probably a legitimate error indicating that your network drive mapping

has been lost. Recreate the map to the server. If you are not on a network, this error can be caused if you have opened multiple copies of the program without realizing it. The easiest cure is to Shut Down your computer. As the computer shuts down, you may see multiple copies of the program attempt to close and you may need to choose End Now.

The Program Disappears when you Open a Case

You probably turned off your computer when the program was minimized and now the program thinks it should open minimized. Look above the Start Button and see if there is an Arranger Icon there. If so, click on the icon and locate the choice to maximize the program.

Unable to open Temp.acs

You are trying to open a second copy of the program and you are not registered for the multi-user version. If you are on a network, check to see if someone else is using the program. If you are not on a network, look above the Start Button to see if you have a copy open and minimized. Your screen saver might have minimized the program when you were away from your desk.

10 Registration

ACS software ships in a Demonstration Mode which allows you to try it before you choose to buy it. Registration is done with the help of the ACS Support Department after you have paid for your software. It is not necessary to use this Utility prior to purchase; however, some aspects of the program will be different until you do so. For example, "Sample" will be printed on Forms if either the Module or the Funeral Home is unregistered.