

Adding Spaces to an Owner

The first step to adding a space to an owner is to open that person's case information. Start by clicking Search on the top toolbar. Here, you can search from a number of criteria, including name. Double click to select that person.

The screenshot shows a search results window. On the left, a sidebar lists 'Person's Relationships' with entries: Harvey Best (brother), John Best (mother), Mary Best (grandmother), and Vesta Best (grandmother). Below this are sections for 'Billing', 'Trust', and 'Person's Graves'. The main window displays a search form with fields for 'Person Identification #', 'Person First Name', and 'Last Name' (containing 'Best'). A 'Search' button is present. Below the form, it says 'Limit Search to Selected Cemetery: ☒ Mapping Demo Cemetery' and '7 People with 38 Places Used'. At the bottom, a yellow bar shows 'Best, Adam' with address '6021 Wallace Road - Westford, PA 15090' and an 'Invoice' link.

Next, navigate to your map. Here, you can simply select the grave that person wishes to purchase. After clicking the appropriate grave, right click and select Add Grave to Invoice. Select the invoice you wish to add it to, or click New Invoice. You'll receive a confirmation message this has worked successfully. Click Billing, then the Purchasers section. Now you can see that person is the purchaser for that grave.

The screenshot shows a 'Purchasers' window. It has tabs for 'Invoice Notes', 'Invoice Taxes', 'Miscellaneous', 'Purchasers', and 'Associated Graves'. The 'Purchasers' tab is active, showing a table with columns 'Name' and 'Prim.'. The table lists 'Best, Adam' with a checked 'Prim.' box and 'Best, Mary' with an unchecked 'Prim.' box. Below the table is a 'Remove Selected Purchaser' button.

On the left side, click View (that selected grave). Here, you can simply drag and drop the person from the left side to the owner. All you need to do is align the green person icon to the blank icon next to Owner Information. Another option is to click the new icon. From here, you can manually enter a new person, or select the person whose information you just entered.

The screenshot shows the 'Owner Information' and 'Space Information' sections. The 'Owner Information' section has a dropdown for 'Best, Vesta'. The 'Space Information' section shows 'Section G, 251.2'. The 'Occupant Information' section shows 'Best, Adam - DOD: 10/15/2014'. The 'Invoice Information' section shows '2 Unique Invoices' and 'Most Recent Invoice on: 4/2/2015'. On the right, a map shows two graves: an orange one labeled 'Best, A 2' and a red one labeled '1'.

A box will pop up asking if this is new or additional ownership for that selected grave. Choose the appropriate button. All information will then populate and forms can be printed.