

# Client

This section is for adding a client's personal information. Some information found on this tab include your custom case number, date and time of death, and the funeral home or the veterinarian clinic this case came from.

The screenshot shows a web-based form for entering client information. The form is organized into several sections with labels and input fields. At the top, there's a 'Case #' field with the value '2011-Simons-5' and a 'Generate' button. Next to it is a 'Crematory' dropdown menu set to 'SRS Crematory'. Below this, a 'Permit #' field contains '45', and a 'Funeral Home' dropdown is set to 'Simons Funeral Home'. The address '7720 Perry Highway, Pittsburgh, PA' is displayed. The 'Scheduled Cremation Date' is '9/3/2015' at '10:00 am', and the 'Date of Death' is '8/31/2015' at '4:42 am'. There are calendar and clock icons for these dates. An 'Authorization Rec'd' field is empty, and a 'Pet/Animal' checkbox is unchecked. The 'Dec. Name' is 'Margaret' and the 'Mack' field is empty. The 'Maiden Name' is 'Miloser'. The 'Address' is '124 Clever Street', 'City' is 'Loveland', 'State' is 'OH', and 'Zip' is '45140'. The 'NOK Name' is 'John' and the 'Mack' field is empty. The 'Dec.' button is highlighted. The 'Address' is '234 State Street', 'City' is 'Pittsburgh', 'State' is 'OH', and 'Zip' is '15212'. The 'Phone' is '412-999-6565', 'Email' is 'john@gmail.com', 'Work Phone' is empty, 'Cell Phone' is empty, 'Relation' is 'wife', and 'Billing Party' is 'FH'. The 'Identified By' is 'John Mack' and the 'Identified Date' is empty. The 'Delivery Person' is 'John W. Simons' and the 'Received By' is 'Simons, Kimberly'. The 'Notes' field is empty. A 'Matthews INTERNATIONAL' logo is visible in the bottom right corner.

**Case Number:** You can manually enter the case number, or we can use your formula to calculate the next number for you by clicking generate.

**Entering a Date and Time of Death:** Here, time of death can also be entered. The arrangement date and time are entered here as well. These fields can be manually enter, or use the calendar and clock dropdown to select the appropriate date and time.

**Personal Information:** The name is entered as well as other contact information. Enter the client's street address. When entering city, state, and zip, you can enter just the zip then either click in a different field or press tab on your keyboard. The city and state will generate based off of the zip code you entered.

**NOK Information:** Here you'll enter contact information for the next of kin for this case. Their relation to the deceased is also entered in this section. If their residence is the same as the deceased, simply click the Dec. button to populate the address.

**Notes:** Enter any notes you'd like in this section regarding this client. Any notes entered can be printed onto a summary page.

## Custom Data Fields

Custom Data allows you to enter any fields, dropdowns, or checkboxes you'd like to see in your software. Here, you can create charts or track information important to your business. If you haven't purchased Custom Data to create your own fields, a checklist will appear that allows staff members to initial, date, and add notes regarding items on that list.