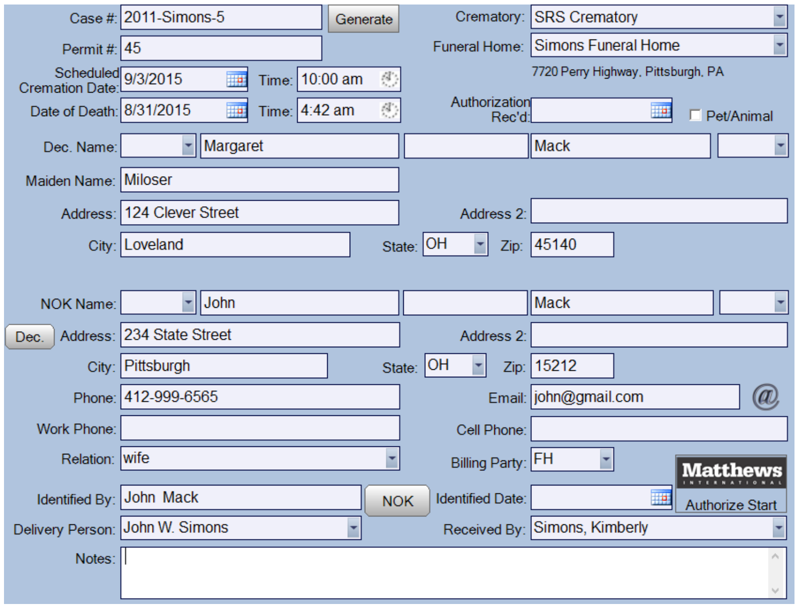
Client

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.



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.