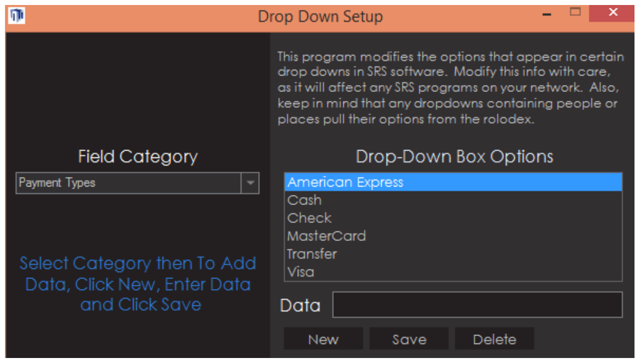
Drop Down Setup

You'll notice how all throughout Phoenix, there's a ton of drop downs to choose from. This makes it much easier so you don't have to manually type in more info. So, how do you manage and change those drop downs? Here's how:

On the bar at the top, click Settings, then the Crematory Info tab. Click the button for Set Up Drop Downs. The field categories are any kind of category you have for a dropdown in Phoenix. A great example is Client Type. This is found on the Client tab at the top right corner. It's a great tracking feature so you know how your clients are grouped.

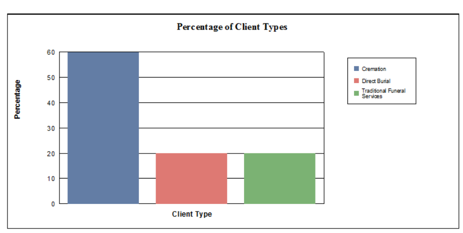
Another good example that tracks how clients find you is Case Originated. For example, you may be involved with a church, or if they found you from your website. By adding these to your drop downs, you can see the statistics in SRS Reports.



For the Client Type options, you can add or delete any option you'd like to appear. Right now, we have a few samples such as Burial and Cremation. Try adding a few more. It's simple to build dynamic lists throughout the program.

Now that you're a PRO at managing your drop downs, let's see why they're so important. Sure, they make it easier so you don't have to type, but they also do a few more things. Client Types, for example are a critical component in the E-View feature. By selecting the appropriate type for a case, E-View automatically builds your cutomized list of things to do for that specific client.

Client Type	Percent of Total	Count
Cremation	60.00%	3
Direct Burial	20.00%	1
Traditional Funeral Services	20.00%	1
	100.00%	**5**



Credit Card

Date	Note			Amount
01/08/2014				$5,000.00
08/29/2014				$5,630.00
10/20/2014				$1,000.00
11/11/2014				$2,282.50
		Credit Card Totals	**$**	**13,912.50**

Discount

Date	Note			Amount
06/17/2014	Discount Item: Vaults - Vault			$500.00
		Discount Totals	**$**	**500.00**

Here's another important use for the dropdowns. Navigate to the Billing section for a client, then the Payments and Adjustments tab. Under type for a payment, you can manage what kind of payment you'd like to accept within your funeral home such as checks, credit card types, and vouchers. You can generate a report using these as well. Find the payment report by type and click the printer icon. This will filter the various payment methods clients are using.