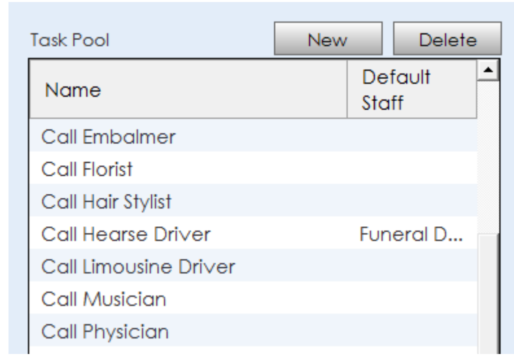
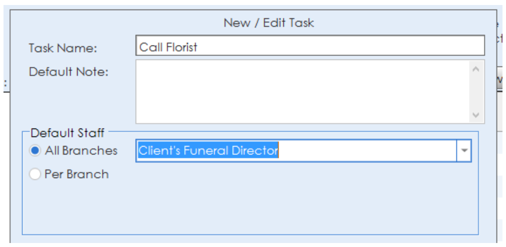
E-View

This feature is the simplest way to keep track of your day to day tasks and has a built-in calendar within your SRS software.

Before we jump in, let's learn how to build some tasks. Go to Settings, then the Tasks tab. Here is where you build your task pool. Start fresh and create a new task. Give your task a name. Think of your checklist on the back of your file folders for each of your clients. This is where you should start. Each one of these should be created in Tasks.

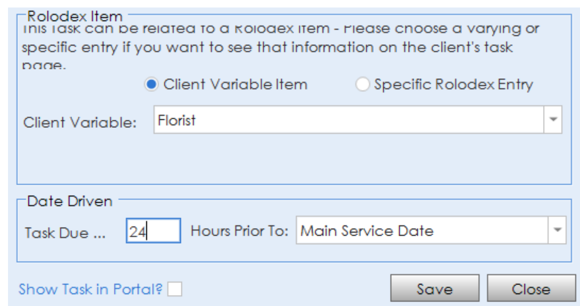
The Notes section is to type in any additional info for your task, although it's not necessary to type anything here.

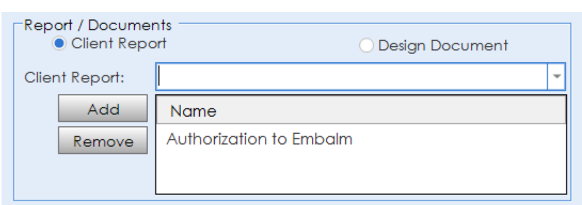




Use the drop down to assign a default staff member to the task. You can assign the staff member by branch, or for all branches. Meaning, if the same person will always be responsible for this task, select their name. If it's variable, like the funeral director in charge of their family, pick Client Director.

Under Rolodex Item, you will want to select client variable item if the contact is different for each case, such as Clergy. If you always want the same vendor to be selected, you can pick their Specific Rolodex Entry. Decide what date in the software you want this task driven from, and click save.

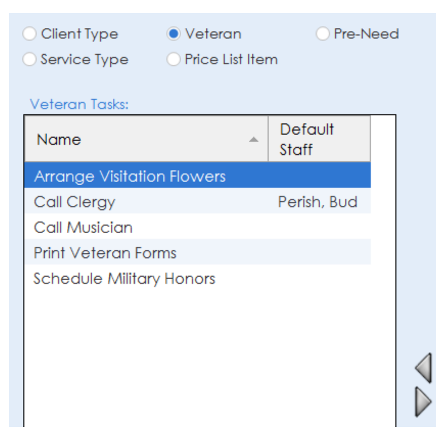




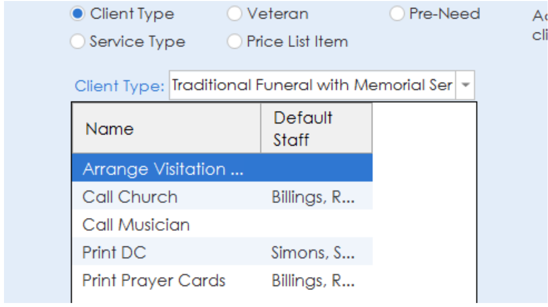
Now, let's try another that opens a form. Click new again and name the task. Assign your staff. In Reports/Documents, select Client Report to open authorizations or reports. Select Design Document for Printed Materials, such as Register Books and Prayer Cards. Be sure to click Add. Multiple reports/documents can be attached to a task. If you add one by mistake, just click Remove.

Keep going until all of your possible tasks are added in the Task Pool!

The left side is where you setup how different triggers automatically build tasks on each case. The goal is for a dynamic list to be generated for each case. For example, by selecting Veteran, you can see tasks for a vet including Print Veteran Forms and Schedule Military Honors. Move tasks in and out by using the arrows in the middle. Now, anytime the box is checked that client is a vet, we'll have this in E-View ready to print the forms!

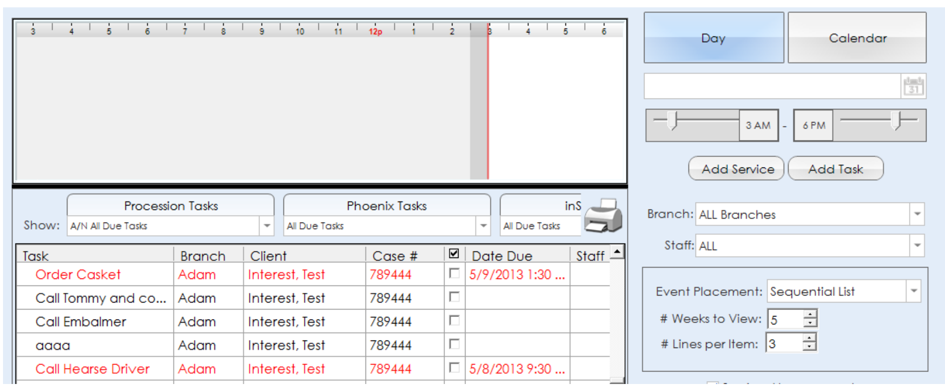


Your client types will be in a drop down also. When you select Traditional Funeral with Memorial Service as a client type, some logical tasks would be Print Prayer Cards and Call Church.



When tasks are completed, there will be a date and time stamp with accountability of who performed this action. You will enter a case just as you normally would, but now in the background, your list of tasks will continue to grow based on your entry. Forms that were attached will open when the box is checked that tasks are complete. Items with a Rolodex entry tied will easily show their contact info without having to search for it.

Where most of our clients start their day is by looking globally at their list of things to do versus picking through each case individually to complete their tasks. To do this, select E-View at the bar on the top. Your 2 different views are Day and Calendar. You can easily toggle back and forth. You will notice only tasks that are not completed will be on this list.



If they're in red, they're overdue or ready to fall through the cracks. You can see where it shows which branch, client, and staff member it belongs to. If you check the box that the task is finished, it'll date and timestamp the time of completion. If there's a Rolodex item for the task, click on the icon to bring up their contact info you attached earlier. If the task it to print something, checking the box will pull a print preview of that document.

Using these branch and staff drop downs are a way to filter all of these tasks you see. You can view the tasks either by a specific branch or by a staff member. Use the printer icon to print a list of all due tasks.