Memorial Folders

All of our Printed Materials follow the same basic design rules. What that means to you is that once you learn one, you'll understand them all. So now, it will be a cinch to do prayer cards, register book, clergy record, acknowledgment, bulletins, and other custom docs.

Let's start with you clicking on the Printed Materials button. If you're using an image for your memorial folder, you'll want to attach that first. Click browse and find the client's picture to insert. Make sure you crop and edit the picture to the way you like it before attaching it in Procession.

Next, select your Memorial Folder Prayer using this dropdown. If there's a prayer you want to use, but don't see it in the dropdown, click edit. Here you can edit existing prayers, or add new ones.

After your image is attached and you've selected the prayer you want to use, click on Memorial Folder. Use the drop down under global templates to select the template you want to use. The clients' information will populate along with the prayer you already selected. We have created a few sample templates for 1-up and 2-up Memorial Folders. You can edit our templates, duplicate them and create new ones.

If everything looks the way you'd like it to, click the printer icon to pull up a print preview then print your memorial folder. If not, you can always make any changes and adjustments.


To create new text, simply click Add Text. To edit existing text on your folder, double click on the text and a box will pop up. The left side offers available text fields that can set to automatically insert on the Memorial Folder. There is about every single text field you've typed on a person's case available.

* When a template is setup once, it can be used on all cases you enter in SRS by saving it in the Global Templates.

So, for example, if you want the deceased's First Name and Last Name to be at the top of the Memorial folder, simply place your cursor where you want the text to appear and find the section for Deceased. Notice that if you single click, it defines what will populate on this case. If you double click, it places it to be merged on the template. The middle box is where you can type any text and any merge fields. Click the arrow button in the middle of these boxes to see information populate. You can edit the font and font size. Click done when you're finished. You can resize and adjust the text box you created by clicking on it, drag the right bottom corner of the box, and resizing.

Now add an image. By clicking Add Image, you have the option to add the default image you've assigned to this case. If you want to add a different image, such as your logo or background images, click From File. This opens your directory of all the pictures and images on your computer. Just drag and drop the picture to where you want it. You can even layer a picture behind text by clicking on the image then use the Move Back or Bring Forward buttons. If you'd like a picture lighter or watermarked, we have an opacity bar to fade it in the background.
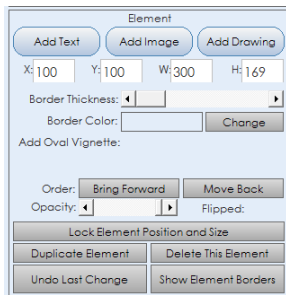

The next button for editing is Add Drawing. Use this for lines, boxes, and borders. Select the shape of your drawing from the drop down, then you can adjust the color and width of your drawing.
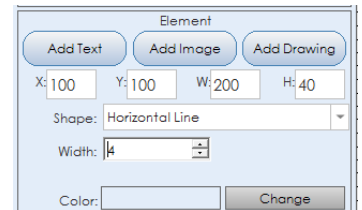
You can align the boxes inside a page by holding the Control button and dragging your mouse over the groups of text. Right click and select the alignment you'd like.

When you're all finished with this Memorial Folder, decide if you want to permanently save it in Global Templates for future use on other clients. Otherwise, save it under THIS CLIENT'S DOCUMENTS, so you will have a copy of what you've created for this specific client. Type in a name for it, then click Save Copy. It's important not to save this under Global Templates unless you want to save this layout and text for every client when you select this template.
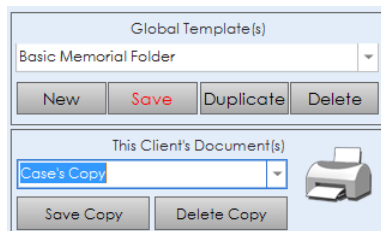
You can create multiple page sizes and layouts by going into the Settings option. This is where you go to adjust the document size and layout to your printer's settings. The system will know what adjustments to make when you click on the various design options.