

Rolodex

There are many sections in Phoenix that pull directly from the Rolodex. For instance, the funeral homes and vet clinics you work with should all be inserted prior to entering a new case. This creates more efficiency.

Click Rolodex to open this section. By selecting a category, any corresponding businesses will be displayed in the lower table. You'll notice sections for email addresses and their website.

Category

- Ambulance Vendor
- Banks
- Benefit Provider
- Business Contact
- Cemetery**
- Church
- Competitor
- Contributions
- Crematory
- Embalmers

Contact

Business Name: Account #:

Name:

Address:

City: State: Zip:

County: Township:

Borough: Inside City Limit: ☐ No ☐ Yes ☒ Unk.

Work, Fax, Cell #:

Email:

Website:

Note:

Default Account: Tax ID #:

Click on the @ icon to send an email, and click the globe to access their website.

Click New to add a new contact under the category you've selected. To add a new category, click Edit Category, then New. Name your category, and what type of category this is, and click Save. In the Custom Data Fields section, you can enter any data fields you'd like to appear for this entry, such as a fee or hours of operation. Click Save, then the X in the top-right corner.

Custom Fields

If you need to store information beyond the basic contact information, you can create input boxes for those fields here.

Name	Type
Mausoleum Fee	Money
Opening Fee	Money
Graveside Fee	Money
Saturday Opening Fee	Money

Clicking the printer icon will print a full report of every category and subcategory within the section. If you want to send a letter, the envelope icon will create a preaddressed envelope.

Rolodex Contacts

Cemetery

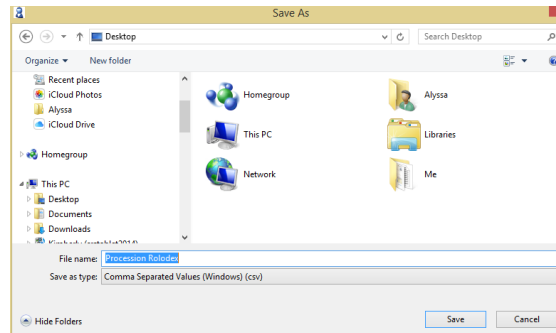
Business	Contact	Address
Allegheny Cemetery	Mr. John Q. Johns	778 Marshall I
Belle Vernon Cemetery		RD1 Main St.
Dade Memorial Cemetery		
East Side Cemetery		546 East Street
Fair Oaks District Cemetery		7300 Olive St.

Allegheny Cemetery
Mr. John Q. Johns
778 Marshall Road
Washington, Pennsylvania 15301

We found it very helpful to have your Rolodex entries in Outlook!

First, you need to create a file to export out of Proccession. Click Export in your Rolodex, and save your file.

* Be sure you're not clicking the Export icon at the top of Proccession!*



Next, open Outlook, click File, then Import. Select Import from Another Program or File. Select Comma Separated Values (Windows). Browse for your file, then choose Contacts for the destination folder, and Finish.

