

## Services

On this page, you can enter all events planned for a client.

Your default visitation times can be changed in Settings. By utilizing these buttons, the only information needed to be manually entered is the date and clergy.

Enter any notes that apply to this client's service(s).

You can enter as many clergy as you'd like, but they must be added to the Rolodex first.

The screenshot shows a web form for entering service events. At the top is a table with columns: Type, Date and Time, End Time, and Location. The first row shows 'Funeral Ceremony', '9/25/2015 10:00 ...', and 'Pine Grove Memorial Gardens'. Below the table are input fields for Type (dropdown), Date (calendar icon), Start Time (clock icon), End Time (clock icon), Location (dropdown), Director (dropdown), and Notes (text area). There are 'New', 'Save', and 'Delete' buttons. Below these are 'Default 1st Visitation' and 'Default 2nd Visitation' buttons. A section for clergy is titled 'You can attach any number of clergy to a service.' and includes a 'Clergy:' dropdown, a list of clergy members (e.g., 'Dennis, Father - No Phone'), and a '< Remove' button.

### Visitation Preparation

The Visitation Preparation tab is where you enter all information regarding preparation work. Any clothing, jewelry, flower, etc. information is entered here. This form can be printed as well. Fees for Florist and Hairdresser will populate based off of that person's Rolodex entry.

The screenshot shows a form for visitation preparation. It includes dropdowns for '1st Viewing F.D.' (Simons, Scott), 'Clothing Source' (Family Provides), 'Under Garments' (Family Provides), 'Purchased Clothing', 'Photo Info', 'Jewelry Location' (With Clothing), 'Jewelry Placement', 'Jewelry Return to Family', 'Jewelry To Be Buried', 'Glasses' (No), 'Cosmetics' (Natural), and 'Cosmetics Instructions'. On the right side, there are dropdowns for 'Hair Stylist' (Stylist, Sammy), 'Day/Time', 'Stylist Fee' (\$30.00), 'Hair Description', 'Florist' (Ken's Flowers), 'Florist Fee' (\$50.00), 'Flower Description', 'Effects to Family', and 'Effects to Dispose'.

### Pallbearers and Music

Pallbearers and Music displays charts of anyone who is selected in Family and Friends as a Pallbearer or an Honorary Pallbearer.

If someone needs to be added to this list, click the Rolodex icon to navigate back to Family and Friends.

The music selection is entered here as well. Use the drop down to select the song, or type it in manually. Use the drop down next to performer to see the options from your Rolodex. If you don't see the performer you wish to use, type in their name. When you click or tab out of this data field, you'll have the option to save to your Rolodex for future use.

Select the performer's title. This list can be edited in Drop Down Setup in Settings.

If the song selection is on a CD, select the Track Number.

Use the drop down to select where this is being performed, whether it's the chapel, graveside, etc.

Any notes can be entered in the Notes section.

Be sure to save when finished.

The screenshot shows a form for pallbearers and music. It has a 'Pallbearers' section with a Rolodex icon and a table with columns: Name, Pallbearer, and Honorary Pallbearer. Below this is a 'Music' section with a table with columns: Track #, Selection, Performer, Performer Title, and Where Performed. The first row shows 'Amazing Grace', 'Mary H.A. Lamb', 'Soloist', and 'Chapel'. Below the table are dropdowns for 'Selection' (Amazing Grace), 'Performer' (Mary H.A. Lamb), 'Perf. Title' (Soloist), 'Track #' (dropdown), and 'Where Performed' (Chapel). There is a 'Note' text area and 'New', 'Save', and 'Delete' buttons.