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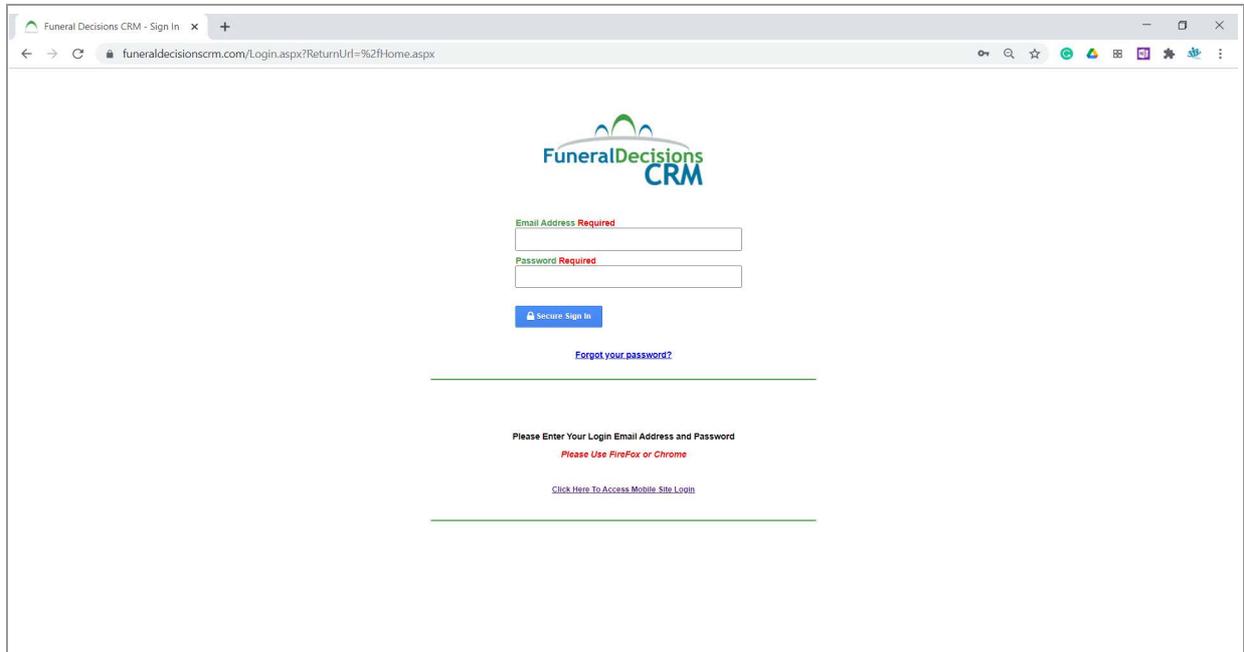
# Overview

# Logging In

FuneralDecisionsCRM

The login page

## Logging In...



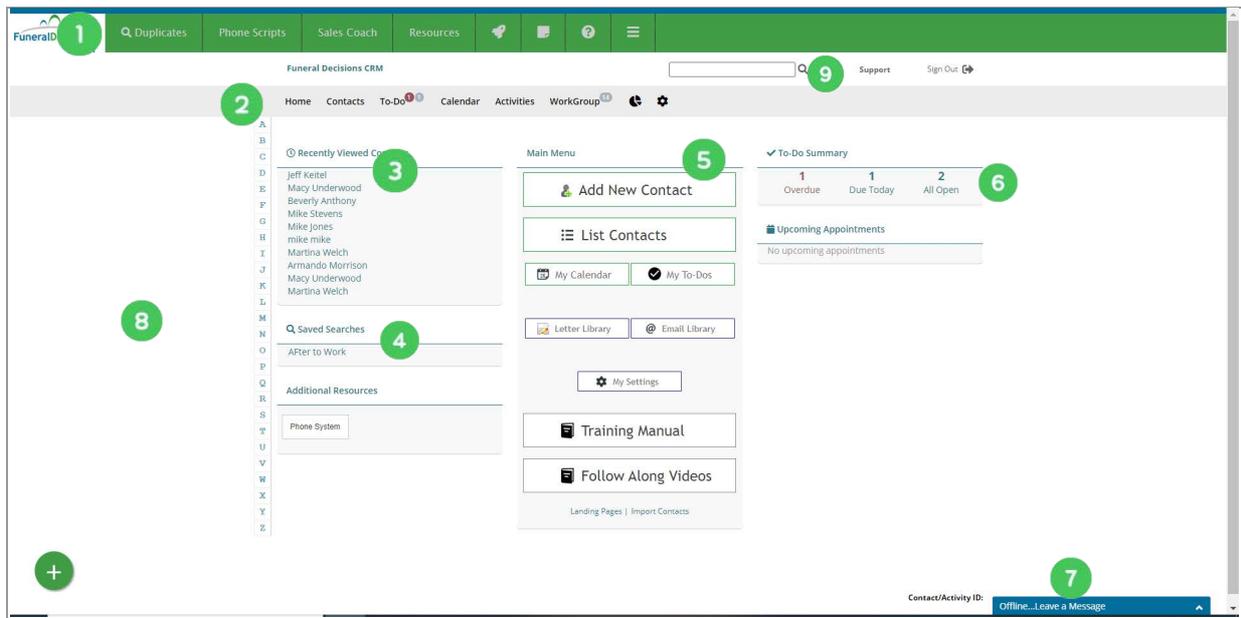
- 1.) Go To 'www.FuneralDecisionsCRM.com and enter your email address and password.
- 2.) Then click the "Secure Log In" button

# The Home Page

FuneralDecisionsCRM

This is the main page and the default page you are taken to when logging in.

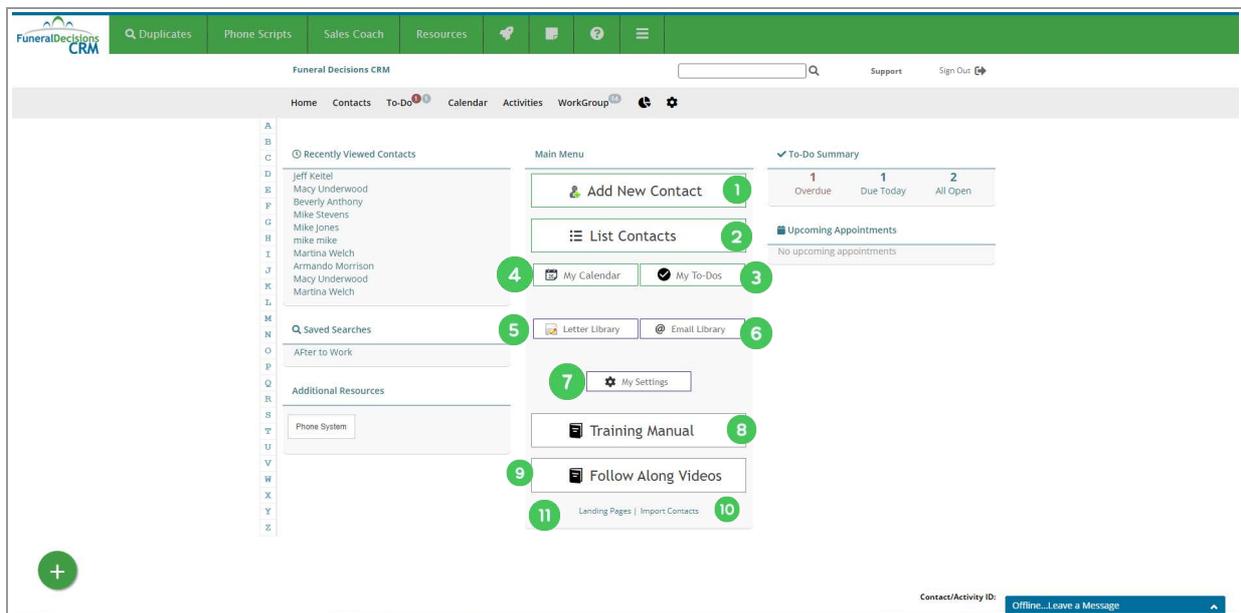
# Overview



This screen is your home page and is the page you are first taken to upon logging in. It is also accessible via the "Home" button on the gray menu bar. The main screen is made up of 9 main areas:

- 1.) Green Menu Bar - This contains system specific features and links
- 2.) Gray Menu Bar - This menu navigates to the same pages and the links in the Action Center
- 3.) Recent Contacts - Your 10 most recently accessed contacts show up here
- 4.) Saved Searches - If you are constantly filtering your contacts the same way, you are able to save those filters so that you can quickly find your contacts that all meet certain criteria
- 5.) Main Menu - This is the main area of navigation in FuneralDecisionsCRM
- 6.) To-Do Summary - This is a 'quick' view into your to-do list. It shows your number of overdue to-dos, the number that are due today, and how many you have open all together.
- 7.) Chat Box - this is where you can chat with an agent who can help with the CRM
- 8.) Rolodex - Accessible from every screen, this gives you a view into all of your contacts with last names that begin with the selected letter
- 9.) Search Box - Search for anyone from any screen with this search box. Definitely the most efficient way to quickly find contacts

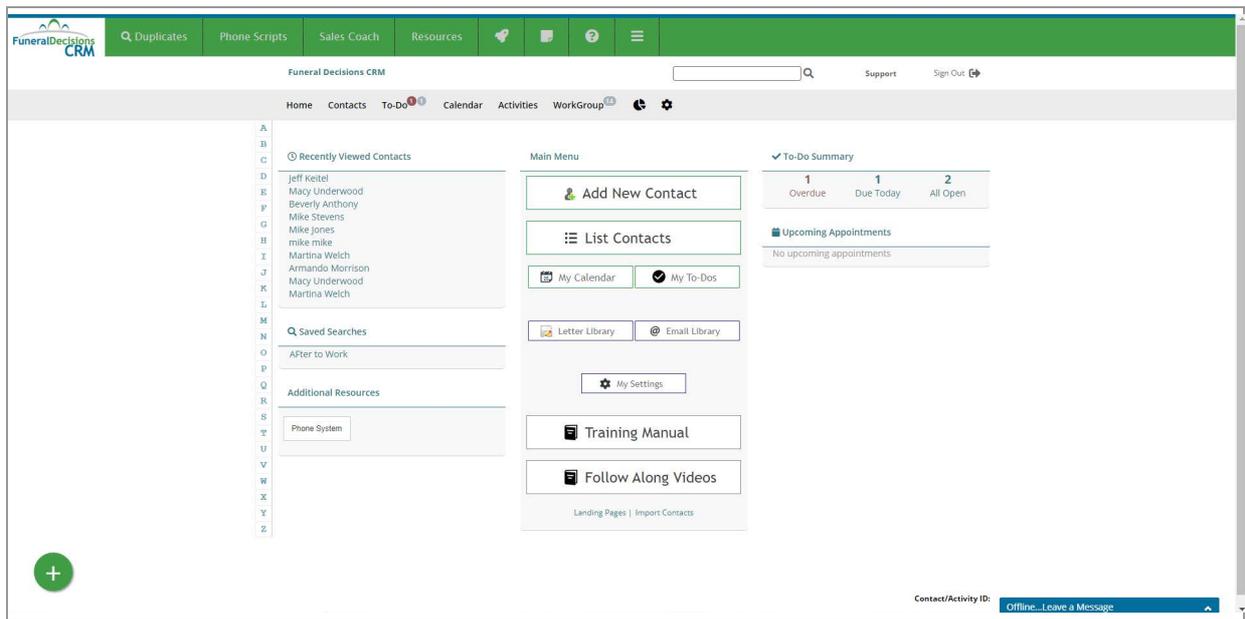
## Main Menu



The "Main Menu" is the main the navigation of the CRM. You can reach this screen anytime by clicking the "Home" button in the gray menu bar. The buttons in the main menu do the following:

- 1.) Add Contact - Takes you to the add contact screen
- 2.) List Contacts - Takes you to your list of contacts where you can access Basic or Advanced Search
- 3.) My To Do's - See your list of to-dos and filter by when they are due and type of to-do (no category, phone calls, emails or letters)
- 4.) My Calendar - Takes you to your calendar for a Monthly, Weekly or Daily view
- 5.) Letter Library - takes you to your letter templates
- 6.) Email Library - takes you to your email templates
- 7.) My Settings - Customize the system as you need to, turn on your Agenda Assistant, add Sources, etc
- 8.) Training Manual - Access the training manual
- 9.) Follow Along Videos- Browse our "Follow Along" training videos as a quick way to learn the system
- 10.) Import Contacts - Have contacts in a spreadsheet? Import them instantly
- 11.) Landing Pages - Need to create a web page about an upcoming seminar you are hosting or want to integrate our system with your current website...all done via landing pages

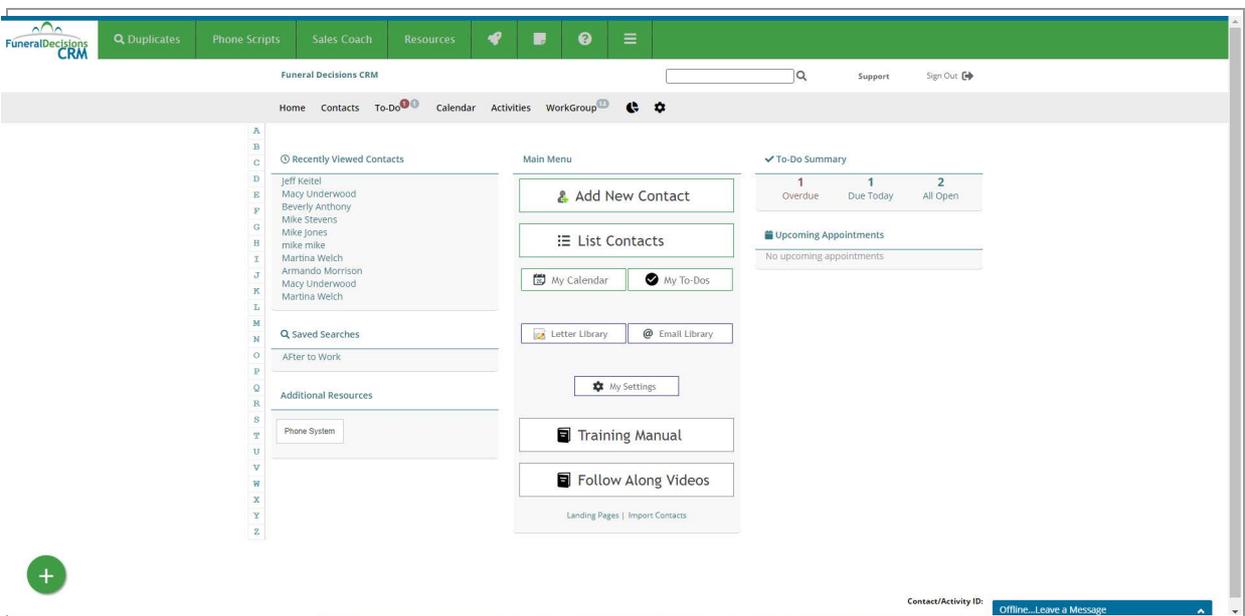
## Green Menu Bar



This upper level navigation includes some system specific functions.

For those in multi-counselor situation, the "Search For Duplicates" button underlined in blue is very important to utilize as it will search across all counselor systems to find duplicate leads.

## Gray Menu Bar



The gray menu bar is accessible on every screen and offers short cuts to the menu times in the Action Center. So clicking on the "Contacts" button in the gray menu bar will take you to the same place as "List Contacts" in the Action Center.

The "Home" button will take you to the Main Screen (shown above) and Action Center.

The "To-Do" button will show the number of Overdue To-dos you have (in red) and To-Dos due today (in gray).

The cog icon is the "Settings" option in this menu.

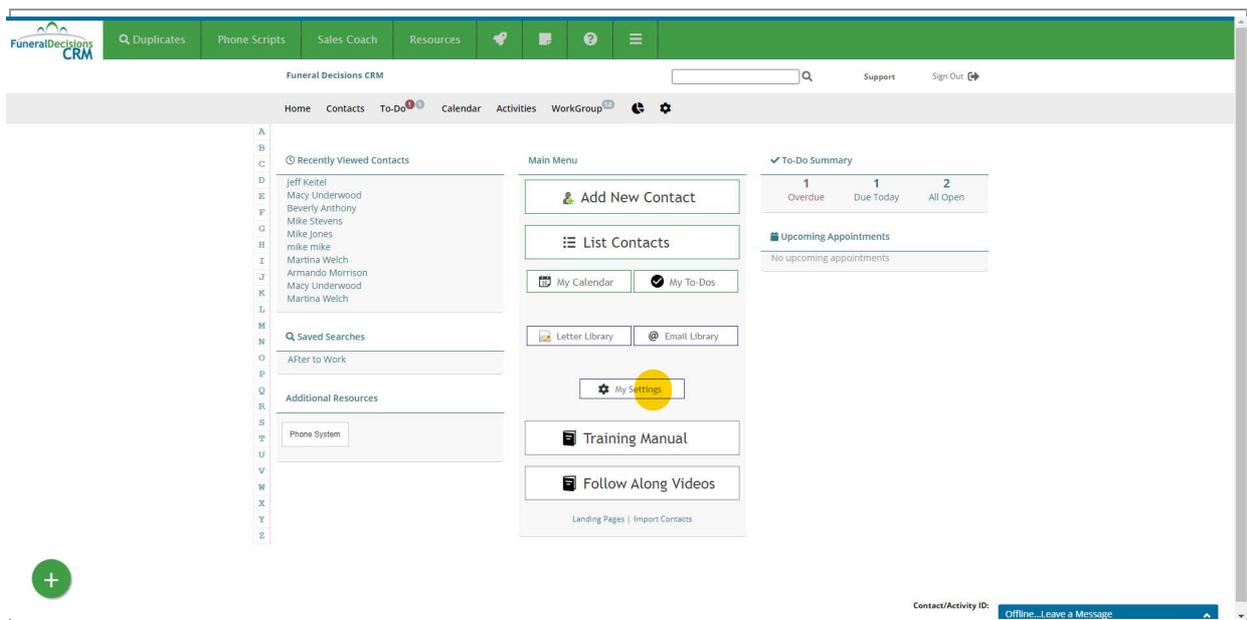
# Initial Setup

*FuneralDecisionsCRM*

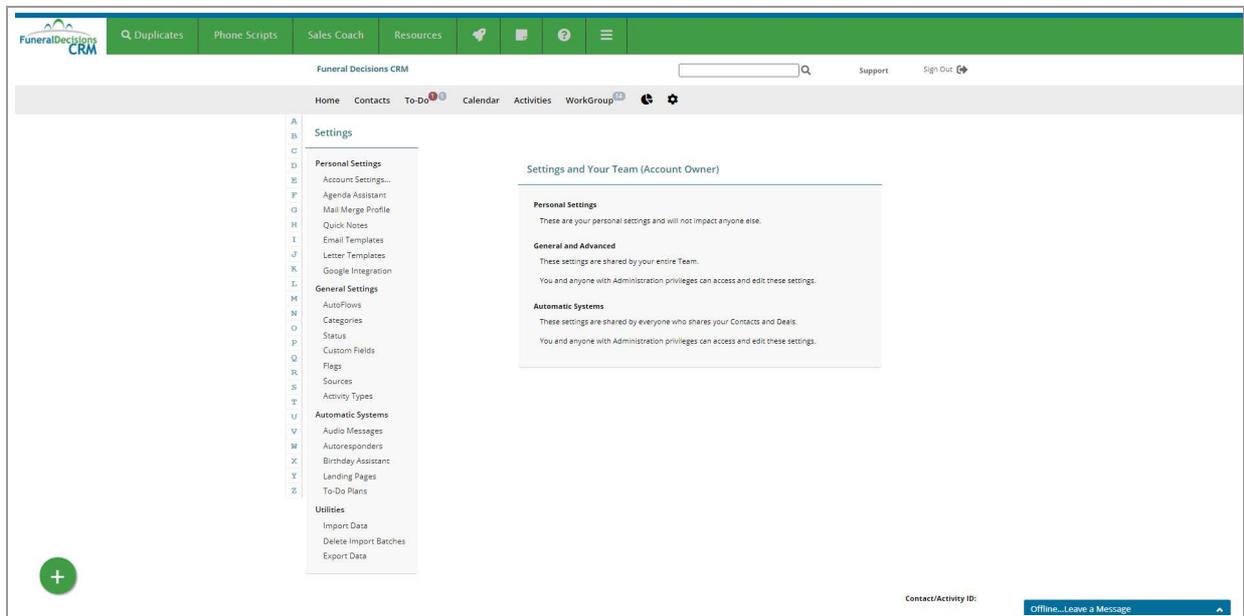
When you first login, you will want to do these two things right away. The first is the Agenda Assistant which will enable you to receive daily email reminders about appointments and to-dos.

The second is the mail merge profile which enables you to send emails and letters through the system.

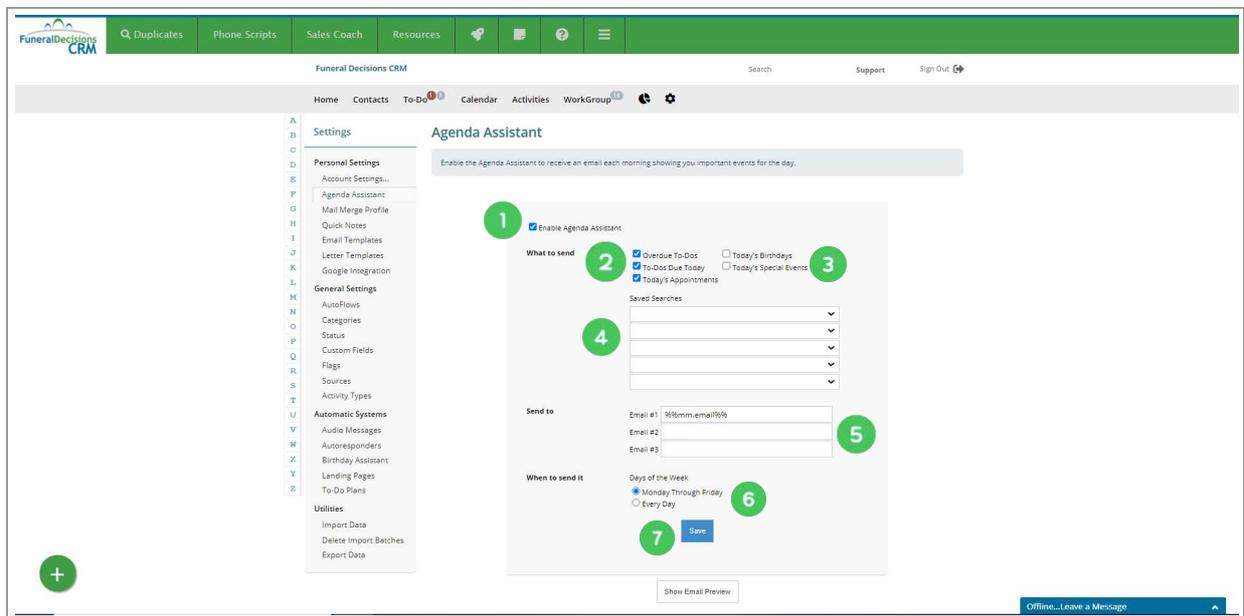
## Agenda Assistant (Daily Email Reminders)



Click on "Settings"



Click on "Agenda Assistant"



1. Check "Enable Agenda Assistant"
2. Check "Overdue To-Dos", "To-Dos Due Today", "Today's Appointments"
3. Check "Today's Birthdays" and "Today's Special Events" if you like to keep track of these
4. Add up to 5 saved searches
5. Enter up to 3 emails where you want your daily reminder sent
6. Choose "Every Day" or "Monday Through Friday"
7. Click on "Save"

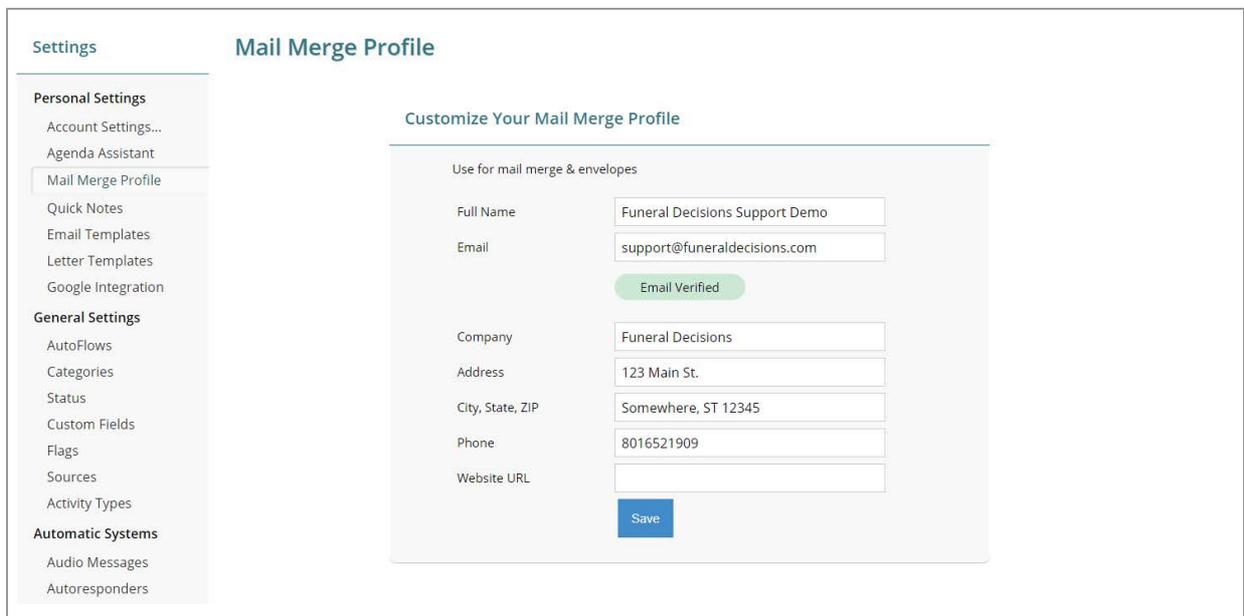
# Fill Out Your Mail Merge Profile

The screenshot shows the Funeral Decisions CRM interface. At the top, there is a navigation bar with options like 'Duplicates', 'Phone Scripts', 'Sales Coach', and 'Resources'. Below this is a search bar and 'Support' and 'Sign Out' links. The main navigation menu includes 'Home', 'Contacts', 'To-Do', 'Calendar', 'Activities', and 'WorkGroup'. A sidebar on the left lists various settings categories: Personal Settings, General Settings, Automatic Systems, and Utilities. The 'Mail Merge Profile' option is highlighted under Personal Settings. The main content area is titled 'Settings and Your Team (Account Owner)' and contains sections for Personal Settings, General and Advanced, and Automatic Systems. At the bottom right, there is a 'Contact/Activity ID' field and an 'Offline...Leave a Message' button.

Click on "Settings"

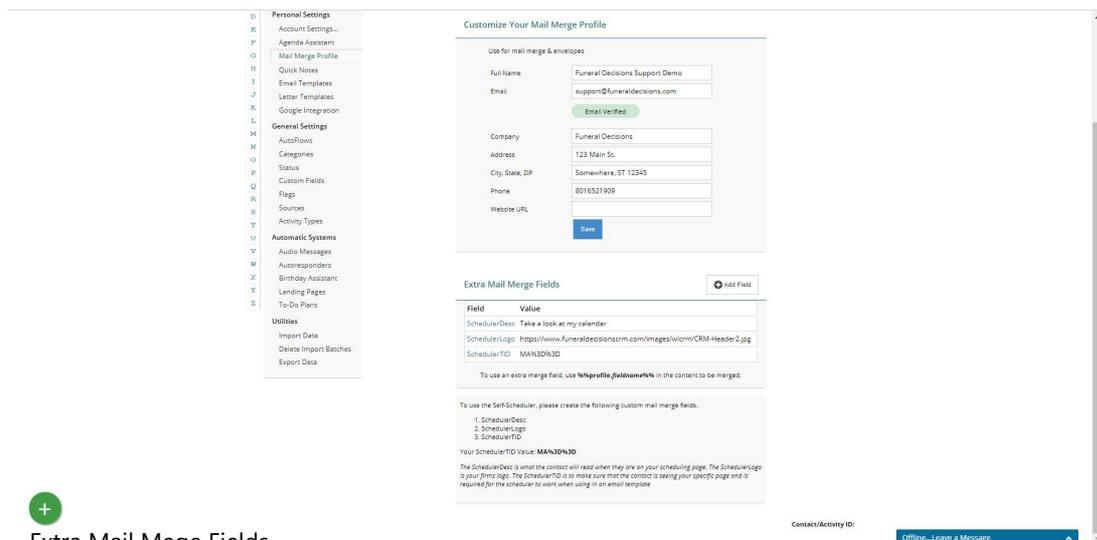
The screenshot shows the 'Customize Your Mail Merge Profile' page. The sidebar on the left is the same as in the previous screenshot, but 'Mail Merge Profile' is now selected. The main content area is titled 'Customize Your Mail Merge Profile' and contains a form for 'Use for mail merge & envelopes'. The form fields are: Full Name (Funeral Decisions Support Demo), Email (support@funeraldecisions.com), Company (Funeral Decisions), Address (123 Main St), City, State, ZIP (Somewhere, ST 12345), Phone (8016521909), and Website URL. There is a 'Save' button at the bottom of the form. Below the form is a section for 'Extra Mail Merge Fields' with an 'Add Field' button. A table shows the following fields and values: SchedulerDesc (Take a look at my calendar), SchedulerLogo (https://www.funeraldecisionscrm.com/images/v/crm/CRM-Header2.jpg), and SchedulerTID (MA%3D%3D). Below the table, there is a note: 'To use an extra merge field, use %ProfileFieldName% in the content to be merged.' At the bottom right, there is a 'Contact/Activity ID' field and an 'Offline...Leave a Message' button.

Click on "Mail Merge Profile"



1. Fill out your contact information
2. Click on "Save"

## Extra Mail Merge Fields



### Extra Mail Mege Fields

1. Follow the instructions at the bottom to set up this section. It is to allow the self scheduler to work

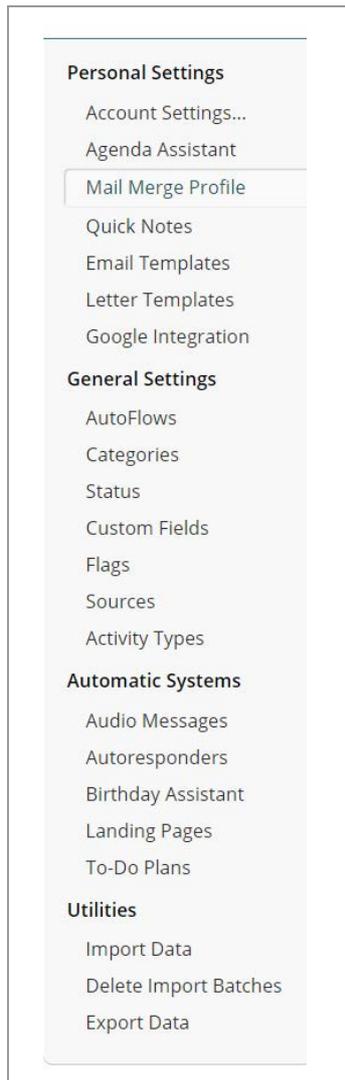
# Settings

FuneralDecisionsCRM

All settings are not available to everyone. If you are an administrator you will see this entire screen, if you are a counselor at a location with a sales manager, you will only see the top "Personal Settings" portion.

# Personal Settings

## Personal Settings

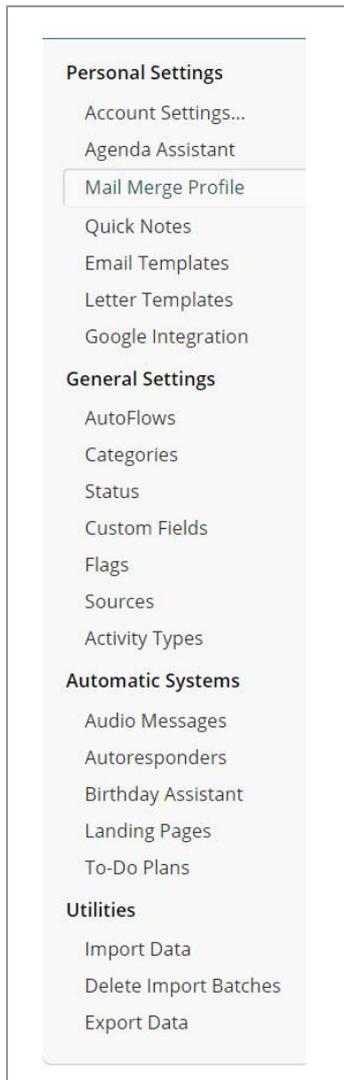


Personal settings are made up of 7 links, 6 of which are available to everyone:

- 1.) Account Settings - Only available to Administrators
- 2.) Agenda Assistant - Turn on or off your daily email reminders
- 3.) Mail Merge Profile - Your contact information. Required to send emails or letters from the system
- 4.) Quick Notes - Quick Notes are used when adding notes to a contact and are an easy way to minimize typing repetitive, generic notes (ie. "Called and left message")
- 5.) Email Templates - Add or edit your own email templates for use in the system
- 6.) Letter Templates - Add or edit your own letter templates for use in the system
- 7.) Google Integration - Hook your FuneralDecisionsCRM up to your Google Calendar for use in other calendars or your phone

# General Settings

## General Settings

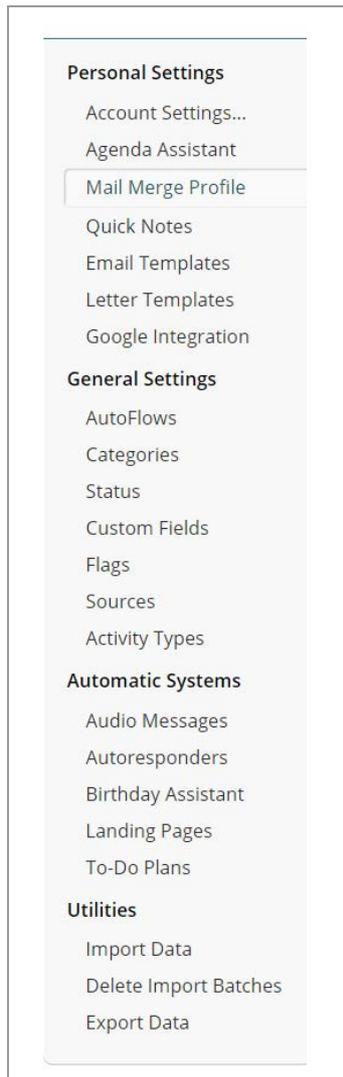


These are only accessible to Administrators

- 1.) AutoFlows - These enable sales and marketing automation when sending out emails
- 2.) Categories - Add/Remove contact categories
- 3.) Status - Add/Remove contact status
- 4.) Custom Fields - Add/Remove the custom fields on the contact record (these are the fields that show up below the contact information)
- 5.) Flags - Add/Remove contact flags (Flags are a great way to add additional filter-ability to contacts)
- 6.) Sources - Add/Remove contact sources
- 7.) Activities - Add/Edit/Remove Deals (See section on deals)

# Automatic Systems

## Automatic Systems

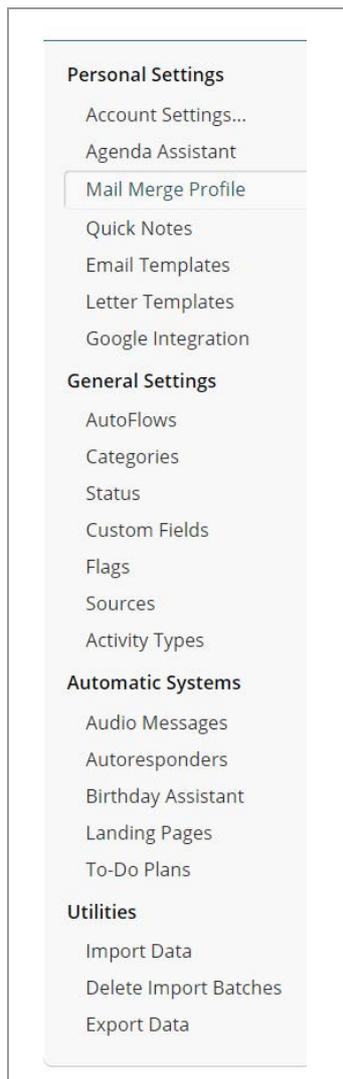


These are available to Administrators and Power Users

- 1.) Audio Messages - Embed audio messages into landing pages
- 2.) Autoresponders - Automatically send prewritten emails
- 3.) Birthday Assistant - Enable the system to automatically alert you to upcoming birthdays or automatically send emails to contact
- 4.) Landing Pages - Create web pages or embed forms into existing websites
- 5.) To-Do Plans - Create multi-step sales and marketing paths for contacts

# Utilities

## Utilities



These are available to Administrators and Power Users

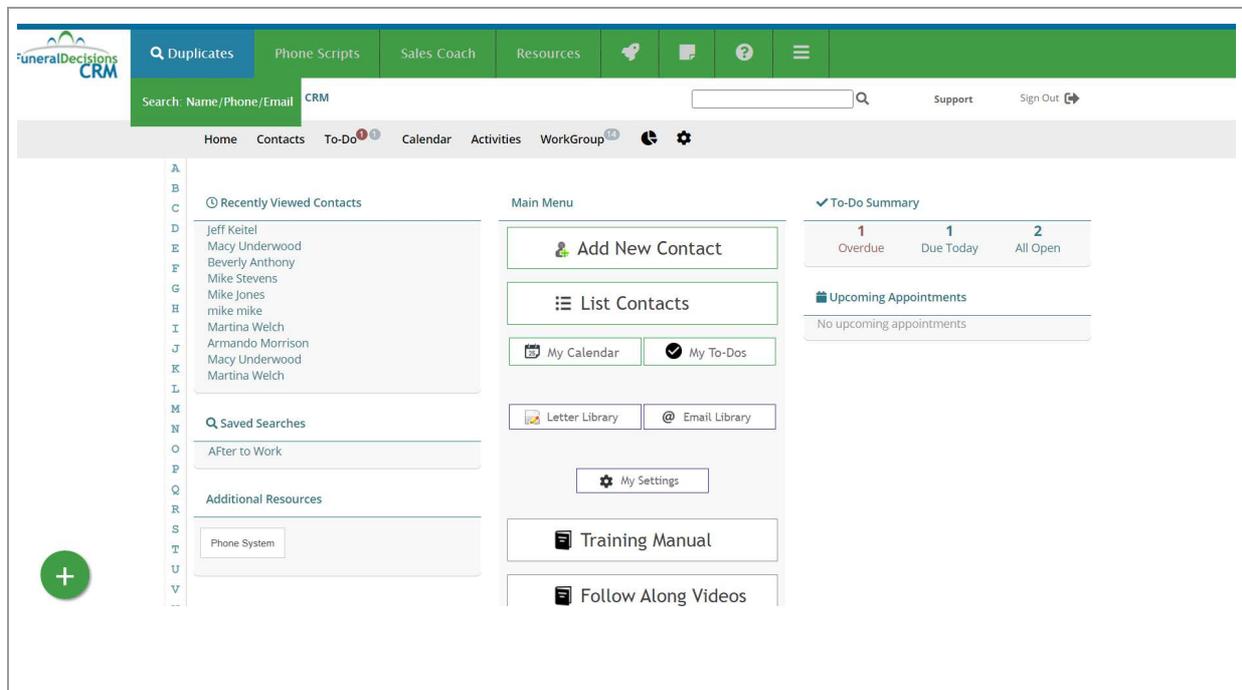
- 1.) Import Data - Instantly import bulk contacts from an Excel Spreadsheet
- 2.) Delete Import Batch - Delete contacts that were bulk imported
- 3.) Export Data - Export contacts and notes in your system

# Contacts

# Adding A New Contact

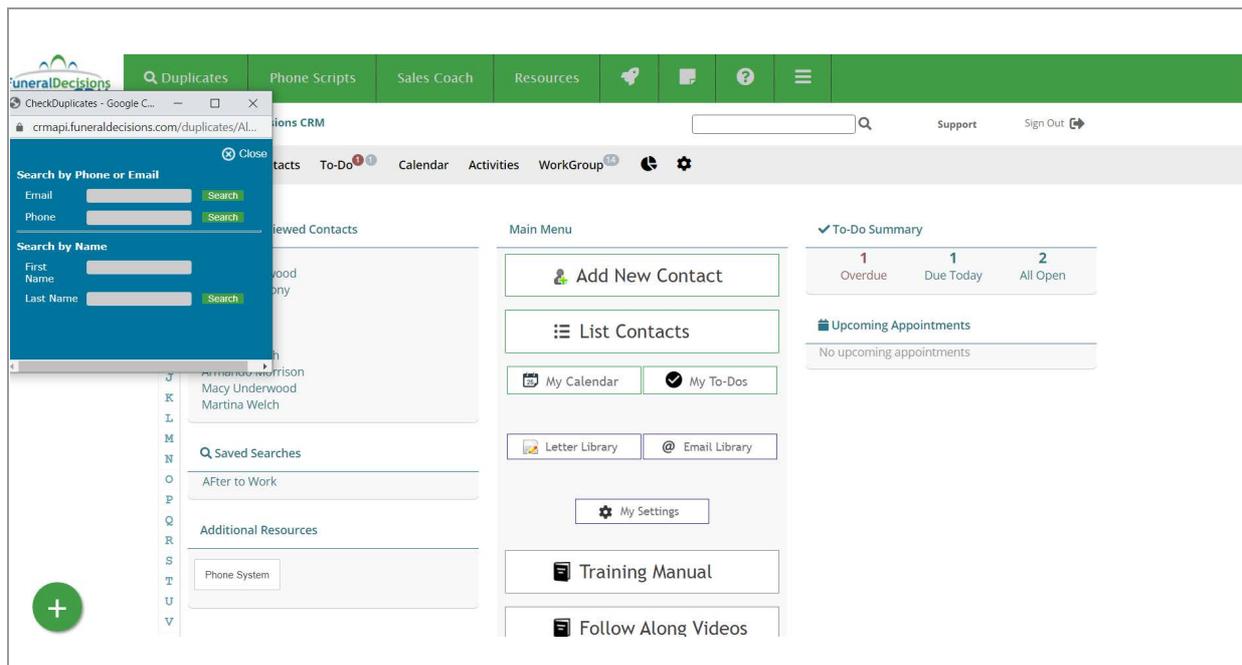
Add a new contact

(For Counselors) - Check For Existing Records



Before entering a contact, you should always check to see if a contact already exists in another counselor's database...

Click on the "Search For Duplicates" button in the green menu bar. There also be an autoflow to check for duplicates post entry

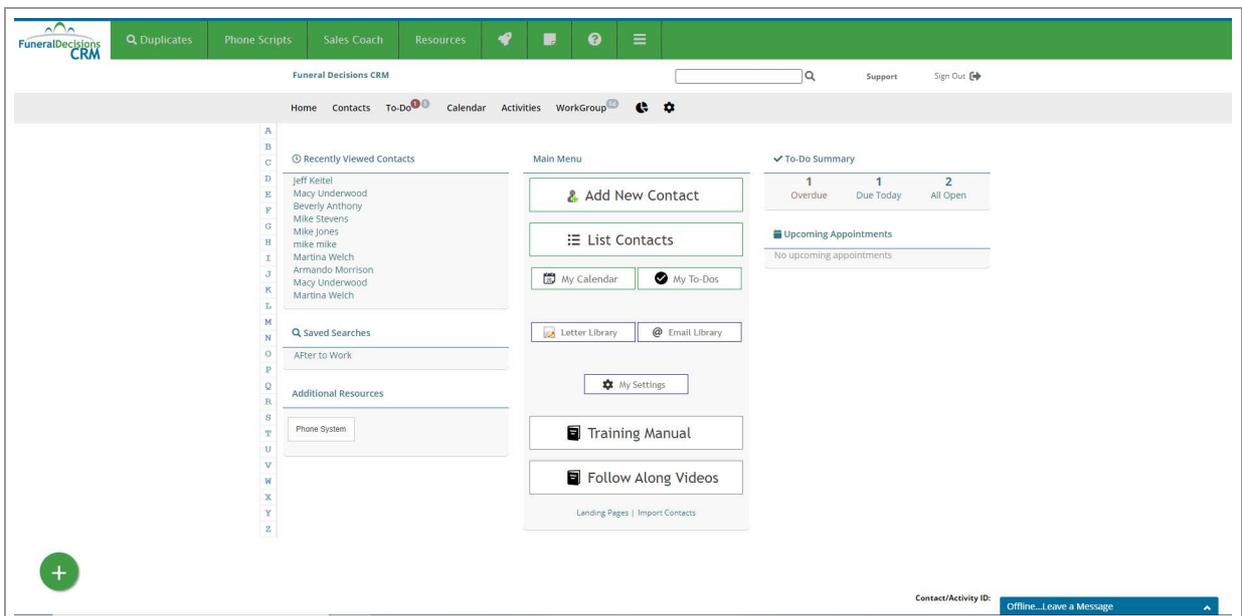


Type in either an email address, phone number or first and last names. Email and phone numbers are much more accurate as many people can exist with the same name. Then click the "Search" button that is associated with the information you entered.

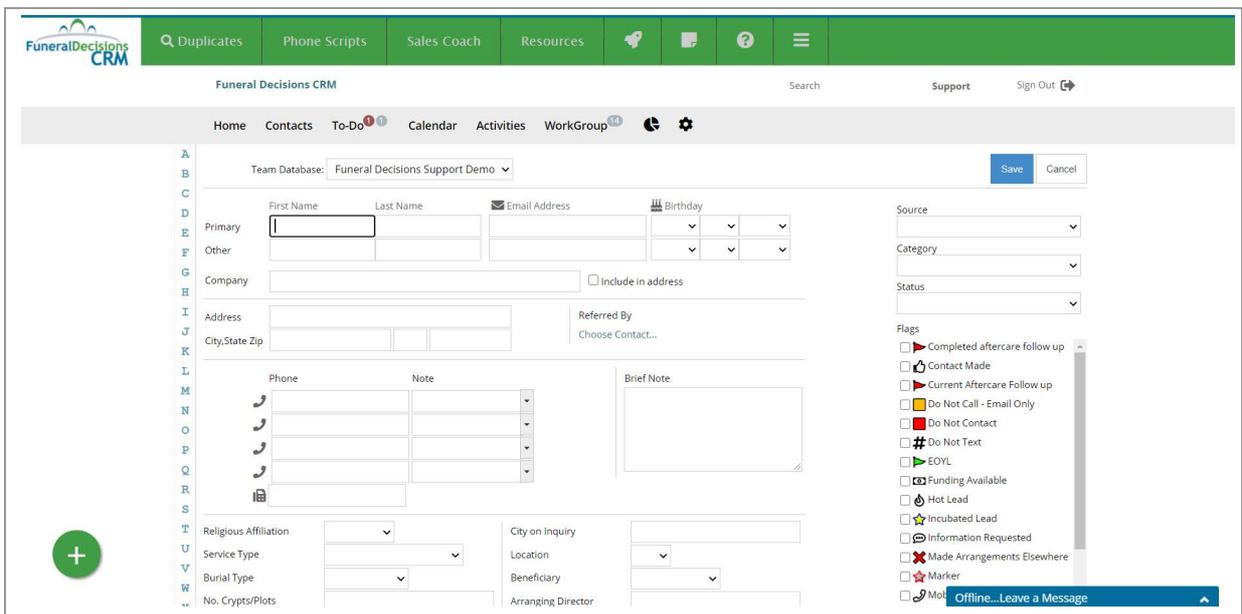


The search will either return "No Duplicates Found" or "Duplicates Found".

## Add the Contact



Now that it has been found there is no existing record, Click on "Add Contact"



1. Enter contact's information...name, email, phone, etc
2. Always enter a Source, Category and status

1. Enter in any additional information you may have about the contact down below
2. Click on "Save"

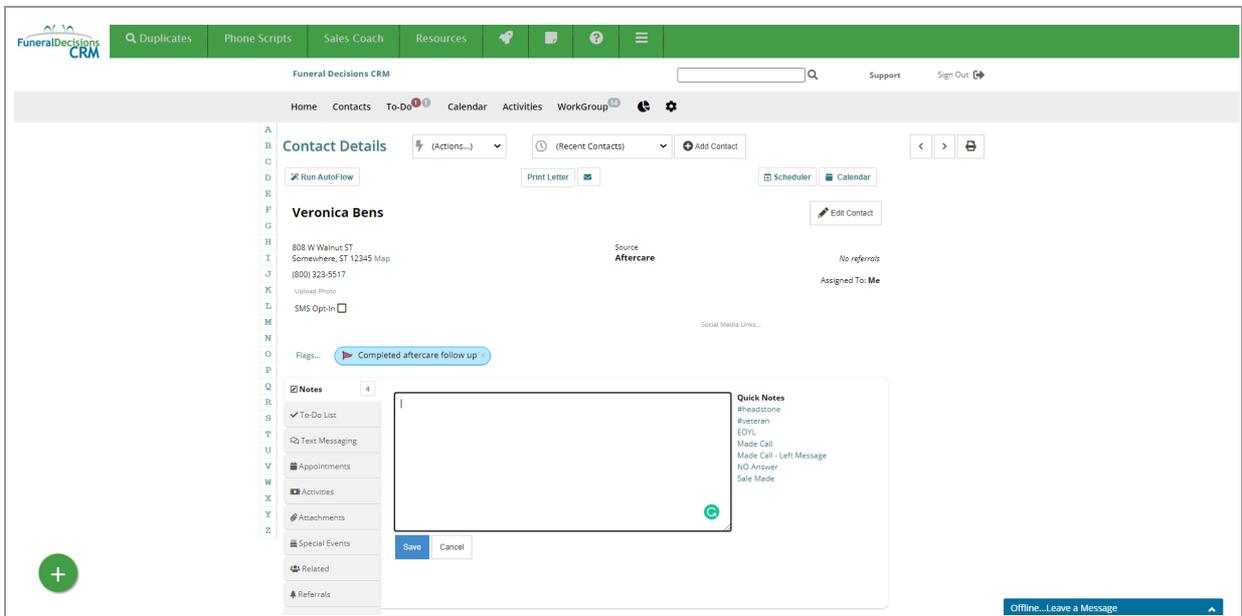
## Add A Note

FuneralDecisionsCRM

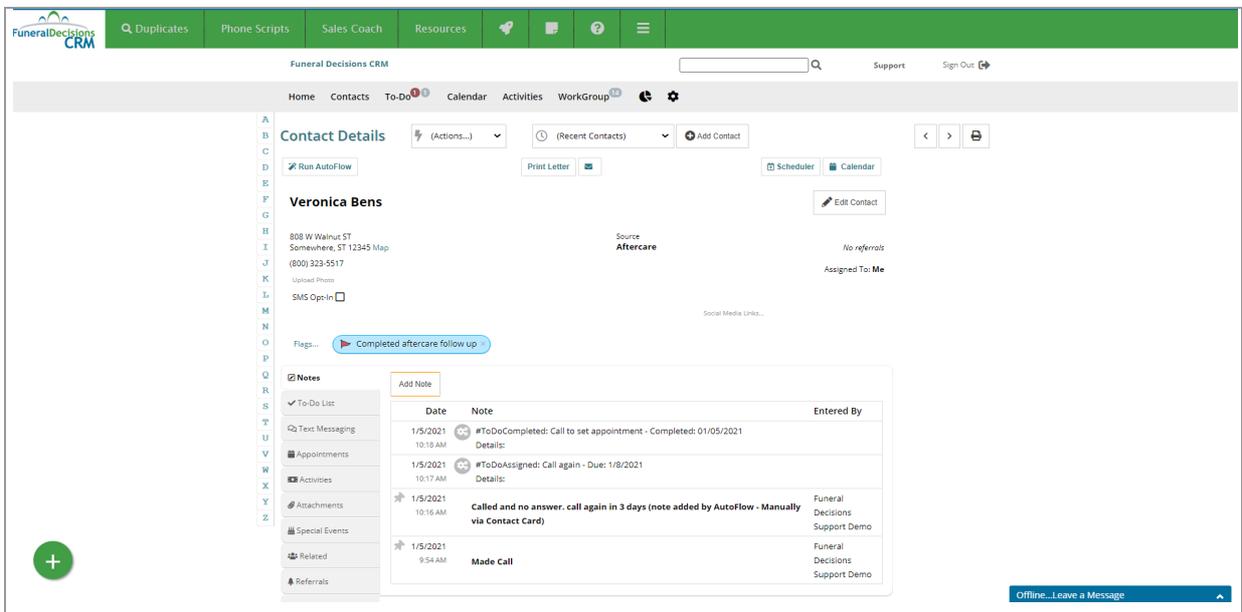
Add a note to your contact

| Date                 | Note  | Entered By |
|----------------------|---|------------|
| 1/5/2021<br>10:18 AM | #ToDoCompleted: Call to set appointment - Completed: 01/05/2021<br>Details: |            |
| 1/5/2021<br>10:17 AM | #ToDoAssigned: Call again - Due: 1/8/2021<br>Details:                       |            |

Whether you add a new contact or find an existing one, the default screen for a contact shows the notes. To add a new note...Click on "Add Note"



1. Enter in your note
2. Click on "Save"



After you click the save button you will be taken back out to the Notes view. You will see your note along with the date and time stamp it was entered.

The push pin icon next to the date will enable you to 'pin' your note so that it stays at the top. Notes are added in chronological order newest on the top.

## Add A To-Do

*FuneralDecisionsCRM*

Add a to-do/reminder to your contact

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

Contact Details (Actions...) (Recent Contacts) Add Contact

Run AutoFlow Print Letter Scheduler Calendar Edit Contact

**Veronica Bens**

808 W Walnut ST  
Somewhere, ST 12345 Map  
(800) 323-5517  
CLICK TO CALL

Source: Aftercare No referrals Assigned To: Me

Flags... Completed aftercare follow up

Add To-Do or add a To-Do Plan: (Select a To-Do Plan)

| Assigned To             | Priority | Due Date | Complete |
|-------------------------|----------|----------|----------|
| Call to set appointment | Normal   | 1/5/2021 | 1/5/2021 |

Offline... Leave a Message

1. Click on "To-Do List"
2. Click on "Add To-Do"

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

Contact Details (Actions...) (Recent Contacts) Add Contact

Run AutoFlow Print Letter Scheduler Calendar Edit Contact

**Veronica Bens**

808 W Walnut ST  
Somewhere, ST 12345 Map  
(800) 323-5517  
Upload Photo  
SMS Opt-In

Source: Aftercare No referrals Assigned To: Me

Flags... Completed aftercare follow up

Summary

Assigned To: Funeral Decisions Support Demo (owner)

Due Date

Details

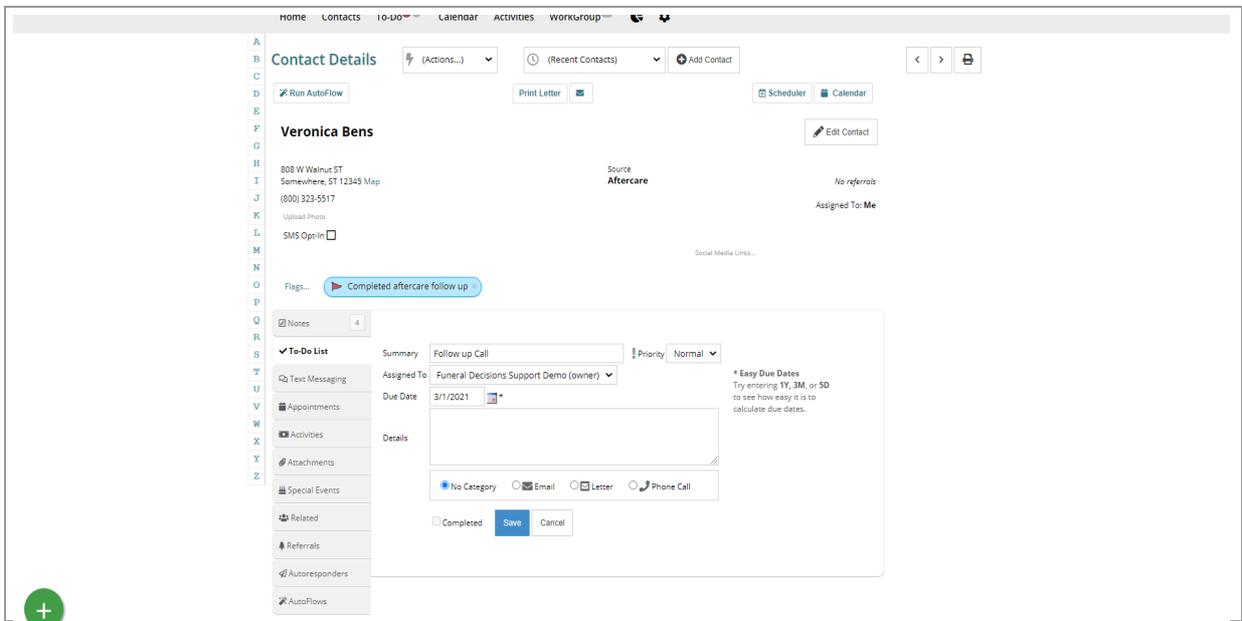
No Category  Email  Letter  Phone Call

Completed

\* Easy Due Dates  
Try entering 1Y, 3M, or 5D  
to see how easy it is to  
calculate due dates.

Offline... Leave a Message

1. Add your To-Do summary
2. Click on "Date" and select the due date

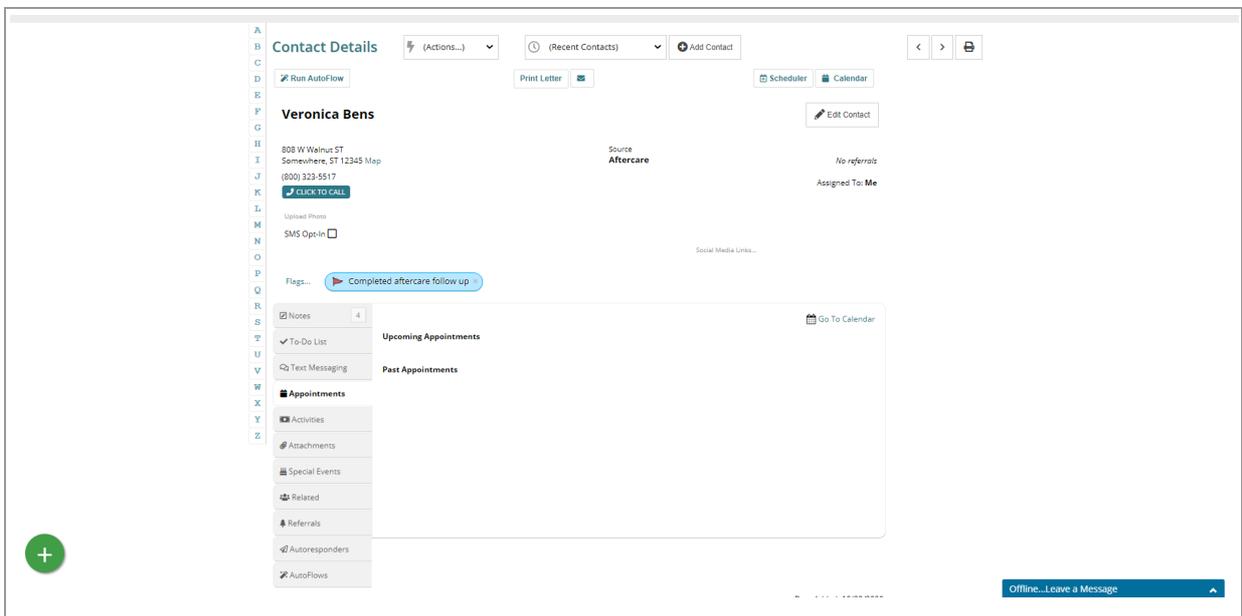


1. Select the category of the To-Do or leave as "No Category"
2. Click on "Save"

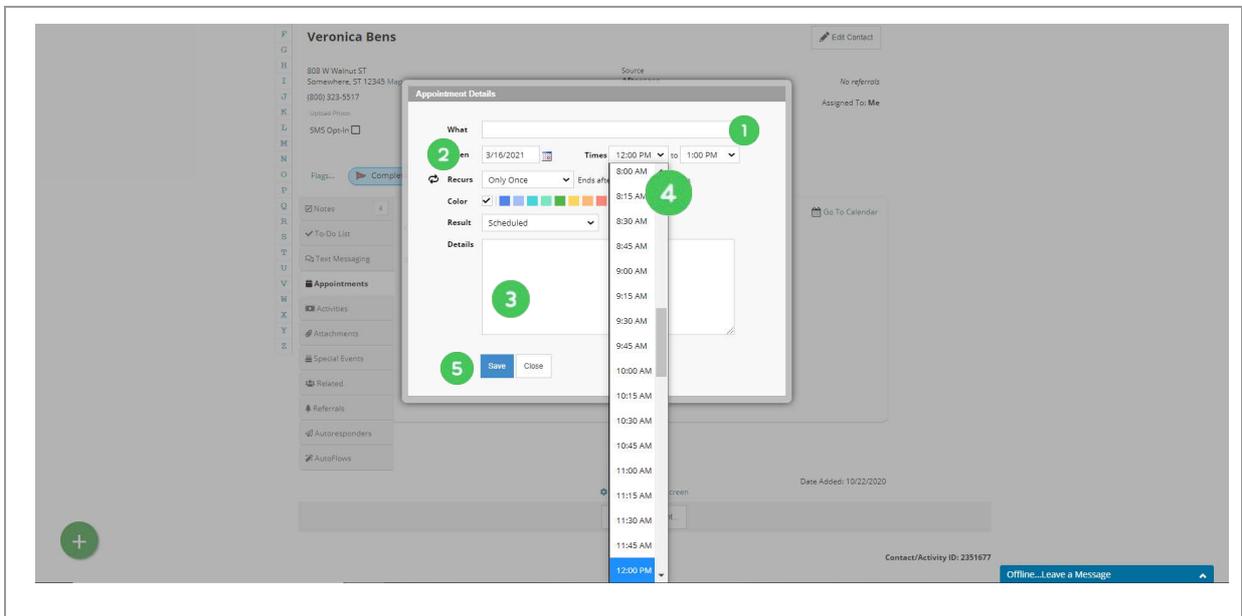
# Add An Appointment

FuneralDecisionsCRM

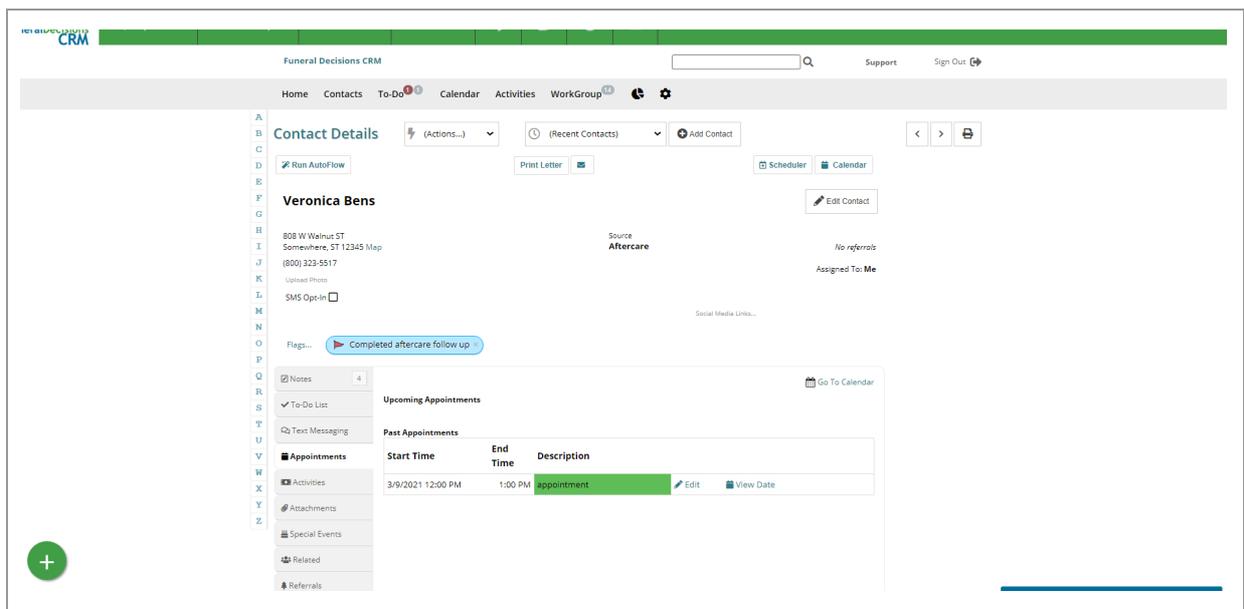
Add an appointment to your contacts



Click on "Make Appointment..." This is at the bottom of every contact screen, regardless of which tab you are in.



1. Enter the title for this appointment
2. Select the date
3. Enter in any details about the appointment
4. Select the Start and End Time for your appointment
5. Click on "Save"

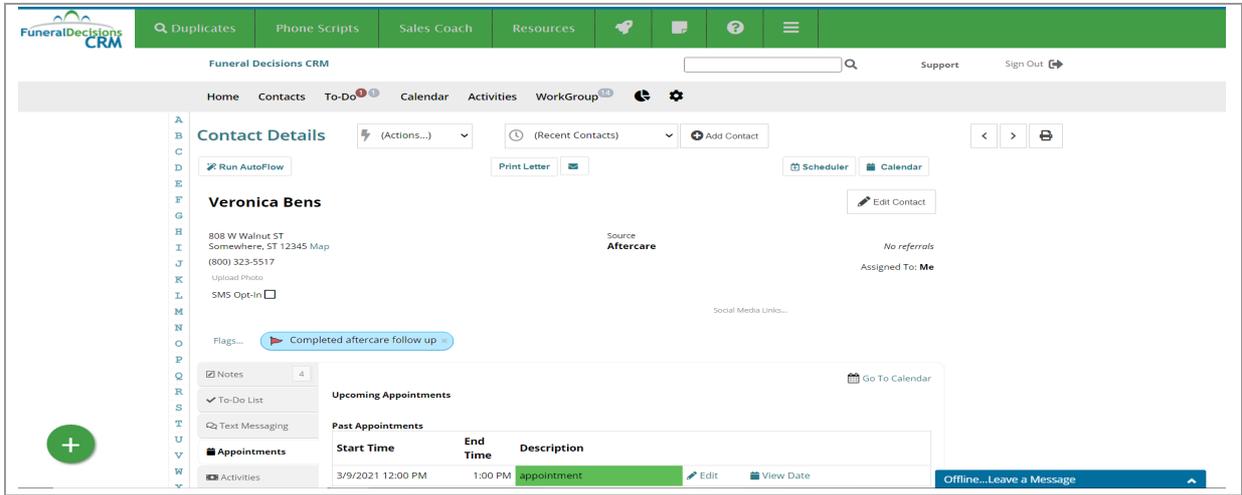


You can see the appointment in the "Appointments" tab on the contact record or up in the calendar.

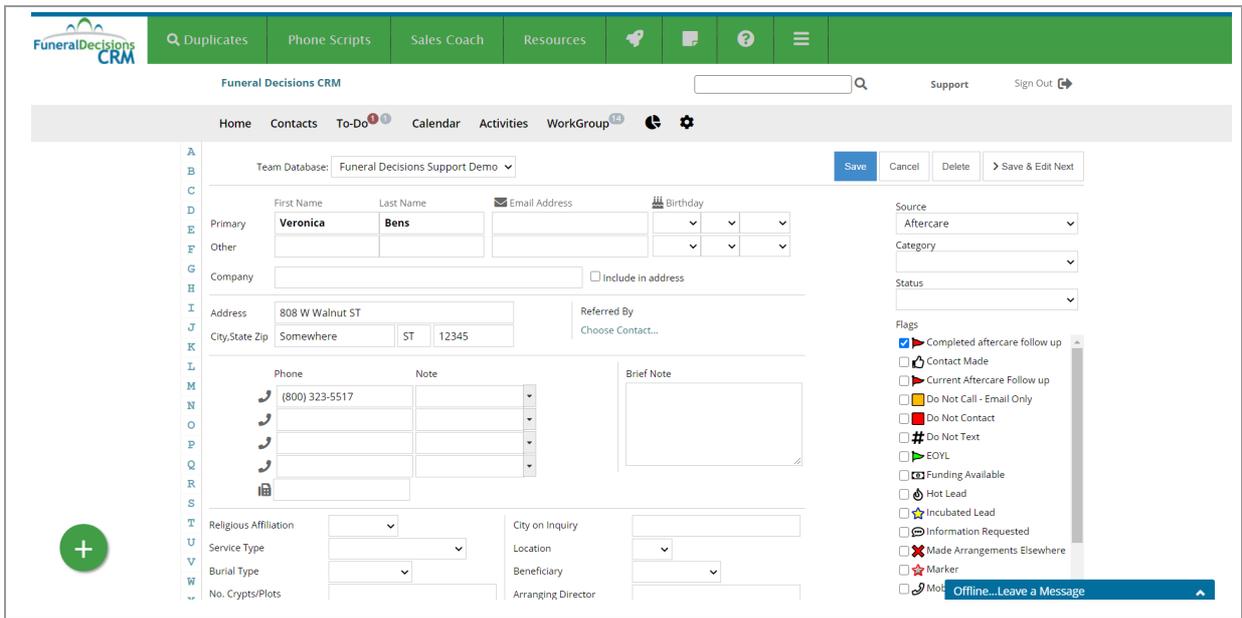
## Update A Contact

*FuneralDecisionsCRM*

Update an existing contact record.



1. Click "Edit Contact" button



1. Enter new information or edit existing
2. Click on "Save"

## Upload A File

FuneralDecisionsCRM

How to upload a file to a contact record.

Home Contacts To-Do Calendar Activities WorkGroup

Contact Details (Actions...) (Recent Contacts) Add Contact

Run AutoFlow Print Letter Scheduler Calendar Edit Contact

**Veronica Bens**

808 W Walnut ST  
Somewhere, ST 12345 Map  
(800) 323-5517  
Upload Photo  
SMS Opt-In

Source: Aftercare  
No referrals  
Assigned To: Me

Flags... Completed aftercare follow up

Notes Add Note

| Date              | Note   | Entered By                     |
|-------------------|--|--------------------------------|
| 3/16/2021 9:51 PM | #Appointment - Appt Time: 03/09/2021 12:00 PM<br>Status: Scheduled<br>Summary: appointment<br>Details: |                                |
| 1/5/2021 10:18 AM | #ToDoCompleted: Call to set appointment - Completed: 01/05/2021<br>Details:                            |                                |
| 1/5/2021 10:17 AM | #ToDoAssigned: Call again - Due: 1/8/2021<br>Details:  |                                |
| 1/5/2021 10:16 AM | Called and no answer. call again in 3 days (note added by AutoFlow - Manually via Contact Card)        | Funeral Decisions Support Demo |
| 1/5/2021 9:54 AM  | Made Call  | Funeral Decisions              |

Click on " Attachments"

FuneralDecisions CRM Duplicates Phone Scripts Sales Coach Resources Support Sign Out

Home Contacts To-Do Calendar Activities WorkGroup

Contact Details (Actions...) (Recent Contacts) Add Contact

Run AutoFlow Print Letter Scheduler Calendar Edit Contact

**Veronica Bens**

808 W Walnut ST  
Somewhere, ST 12345 Map  
(800) 323-5517  
CLICK TO CALL  
Upload Photo  
SMS Opt-In

Source: Aftercare  
No referrals  
Assigned To: Me

Flags... Completed aftercare follow up

Notes Attach New File Select a file from your computer; then click Upload Selected File.

Choose File No file chosen Upload Selected File

Attachments

Offline...Leave a Message

Click on "Browse..." to find the document you wish to upload

FuneralDecisions CRM Duplicates Phone Scripts Sales Coach Resources Support Sign Out

Home Contacts To-Do Calendar Activities WorkGroup

Contact Details (Actions...) (Recent Contacts) Add Contact

Run AutoFlow Print Letter Scheduler Calendar Edit Contact

**Veronica Bens**

808 W Walnut ST  
Somewhere, ST 12345 Map  
(800) 323-5517  
CLICK TO CALL  
Upload Photo  
SMS Opt-In

Source: Aftercare  
No referrals  
Assigned To: Me

Flags... Completed aftercare follow up

Notes Attach New File Select a file from your computer; then click Upload Selected File.

Choose File No file chosen Upload Selected File

Attachments

Offline...Leave a Message

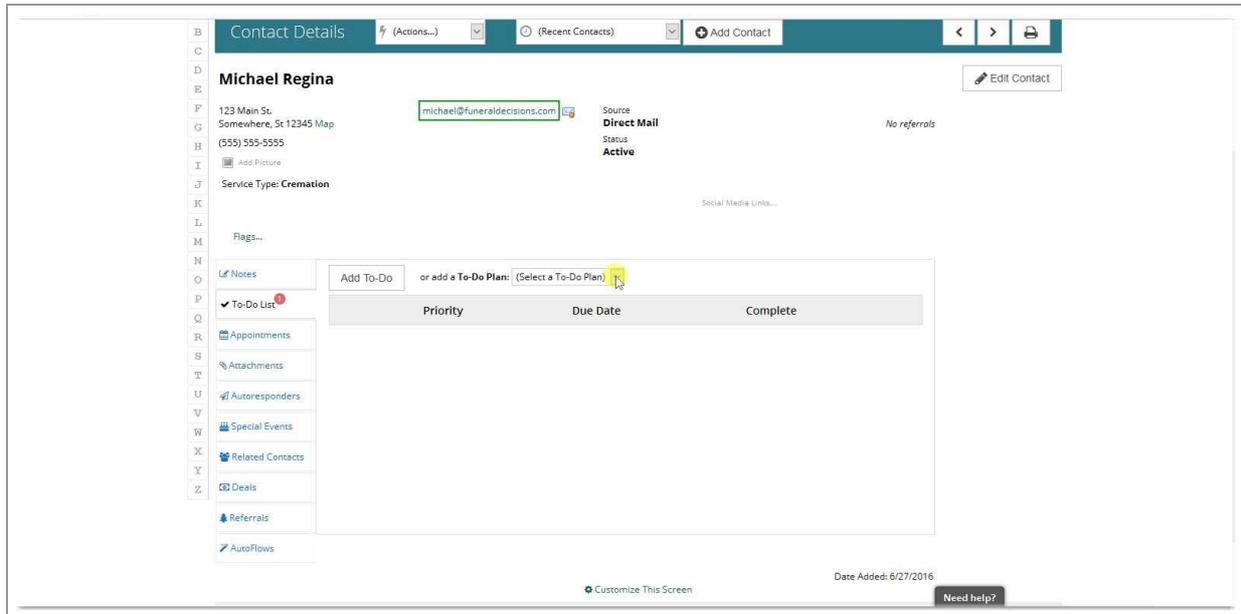
After you selecting the file, Click on "Upload Selected File". Your file will now be available in the contact record.

# Launch a To-Do Plan for a Single Contact

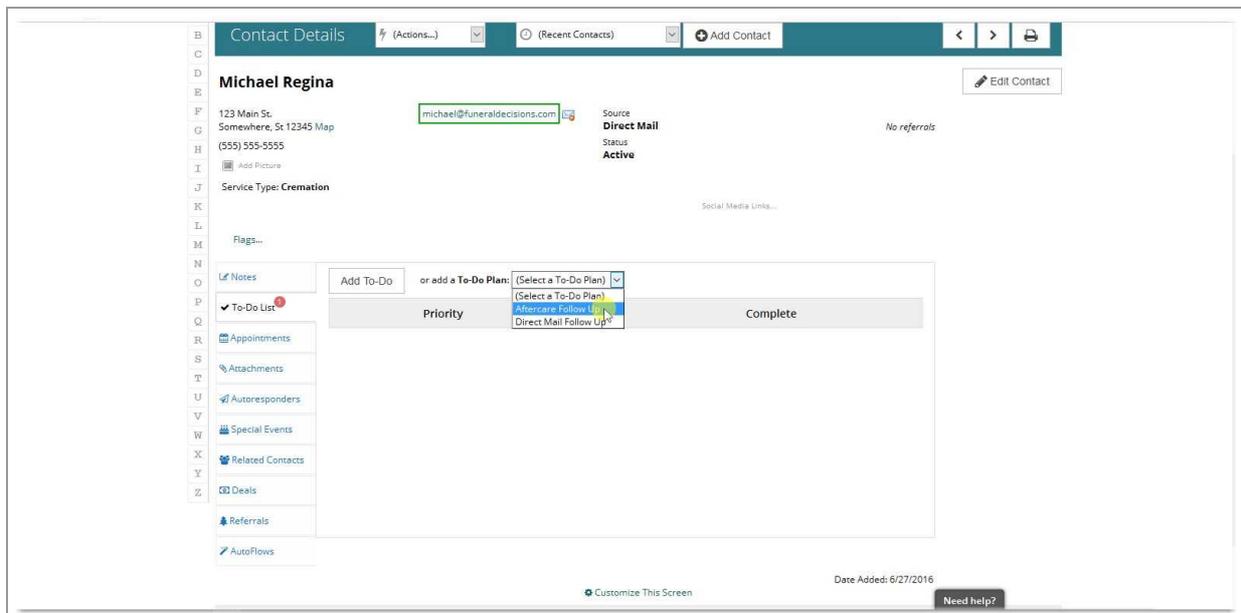
FuneralDecisionsCRM

Build a custom To-Do plan

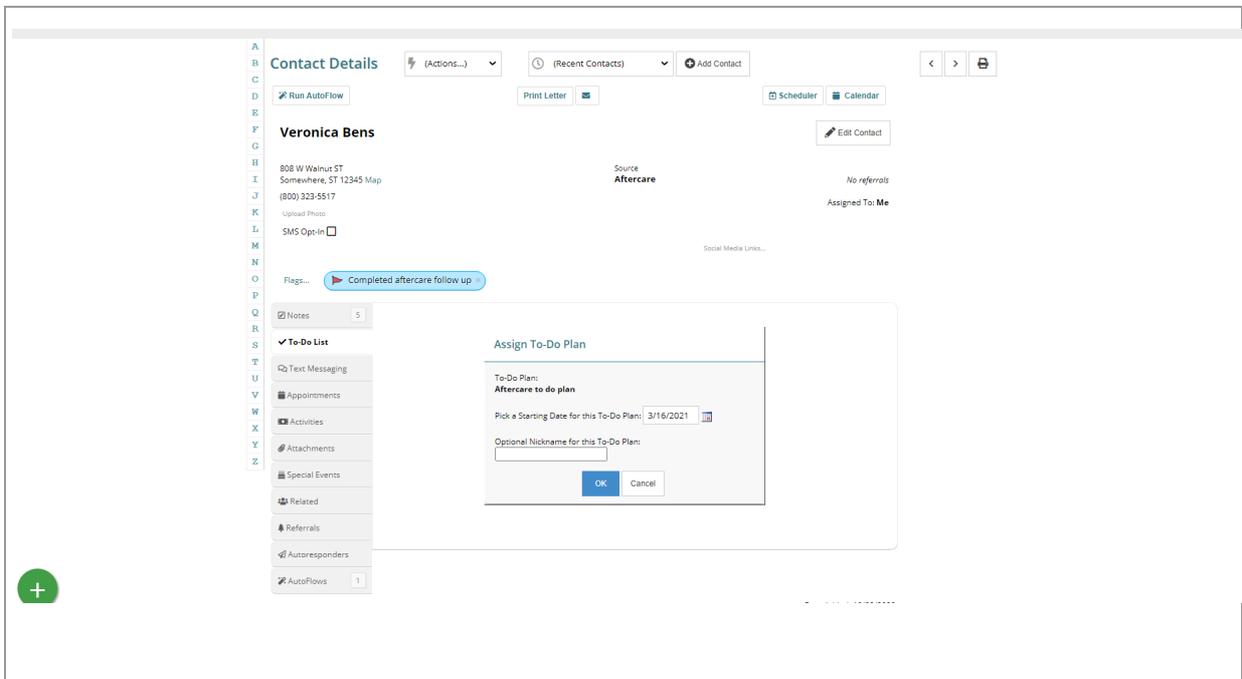
## To Launch the To-Do Plan for a Single Contact



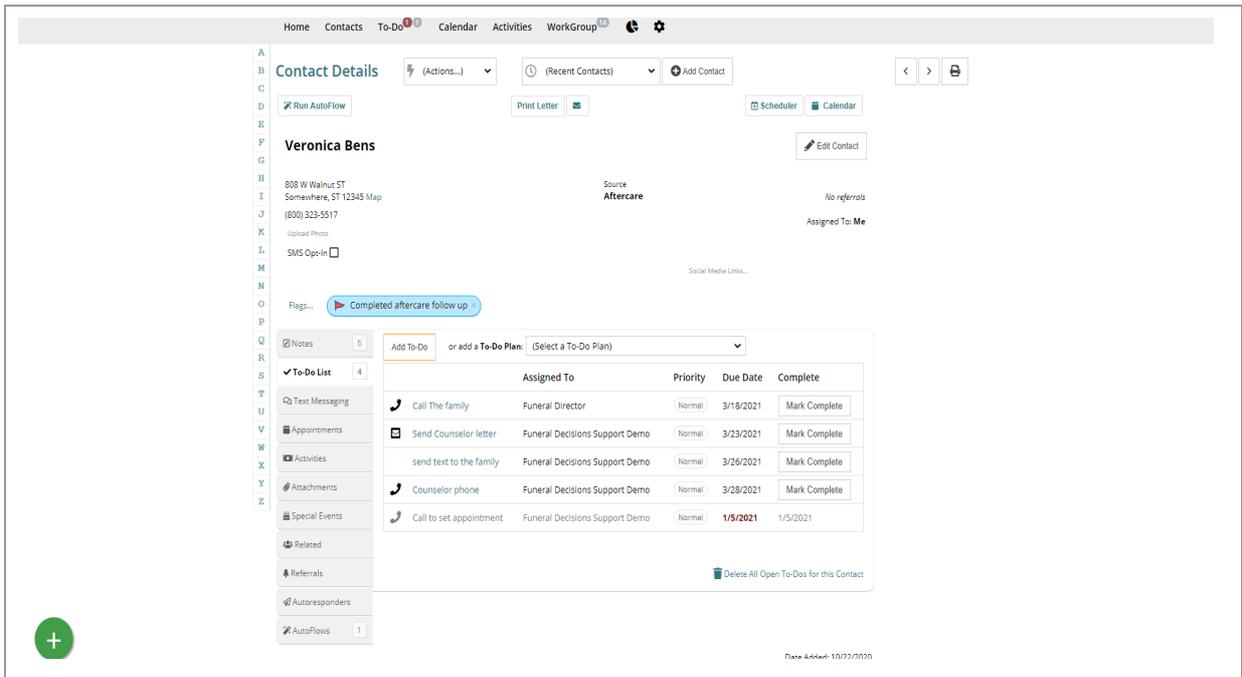
1. Go to the contact record, click on the "To-Do List" tab on the left side underneath "Notes"
2. Click the drop down menu titled "Select a To-Do Plan"



Select the To-Do Plan you wish to put the contact on.



Select the date and click "Ok". With To-Do plans you can post date or use a future date, it does not have to be the current day.



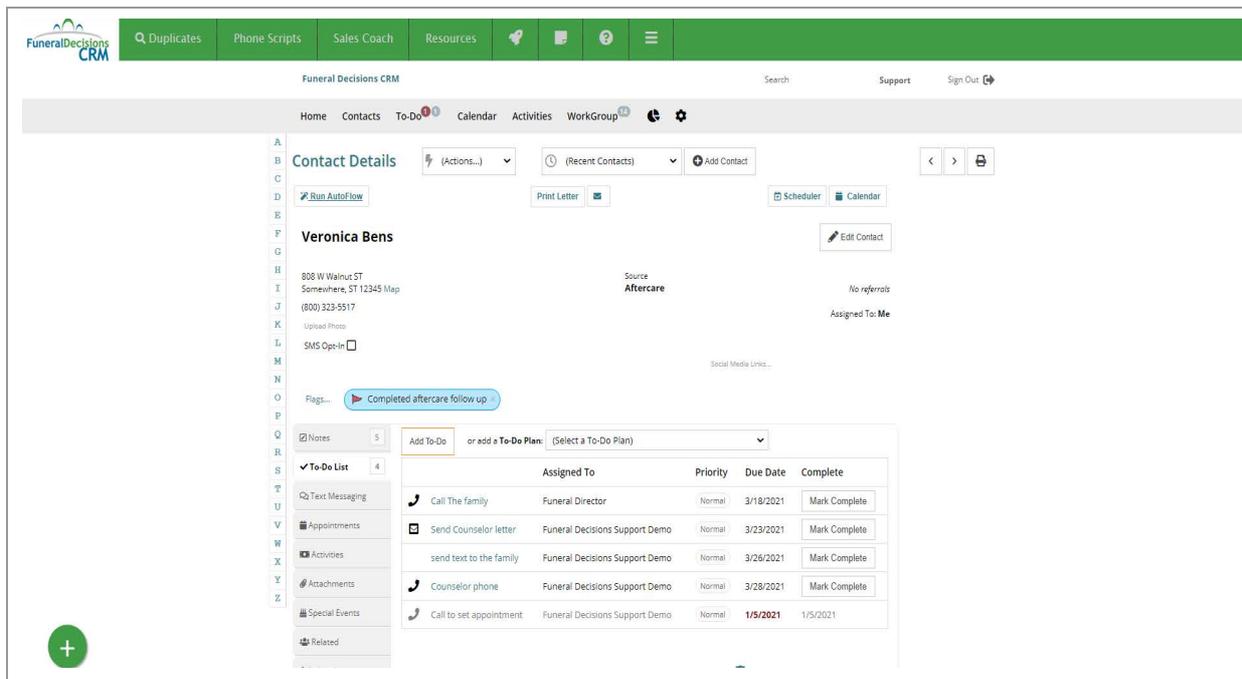
You will know see the plan steps show up in the to-do list with the predetermined intervals.

# Launch An Autoflow Single Contact

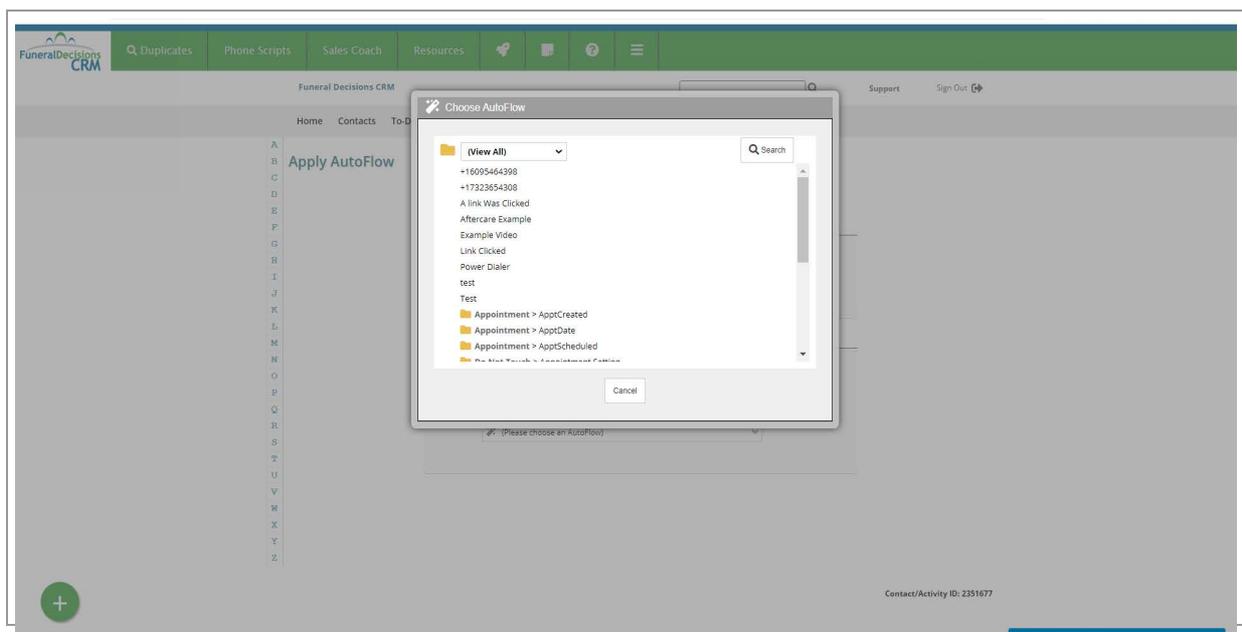
FuneralDecisionsCRM

Launch an Autoflow

# To Launch On an Autoflow for a Single Contact



Go into the contact record you wish to have on a campaign and click on the "Autoflow" tab



From the drop down menu, select the campaign you wish to run for the contact.

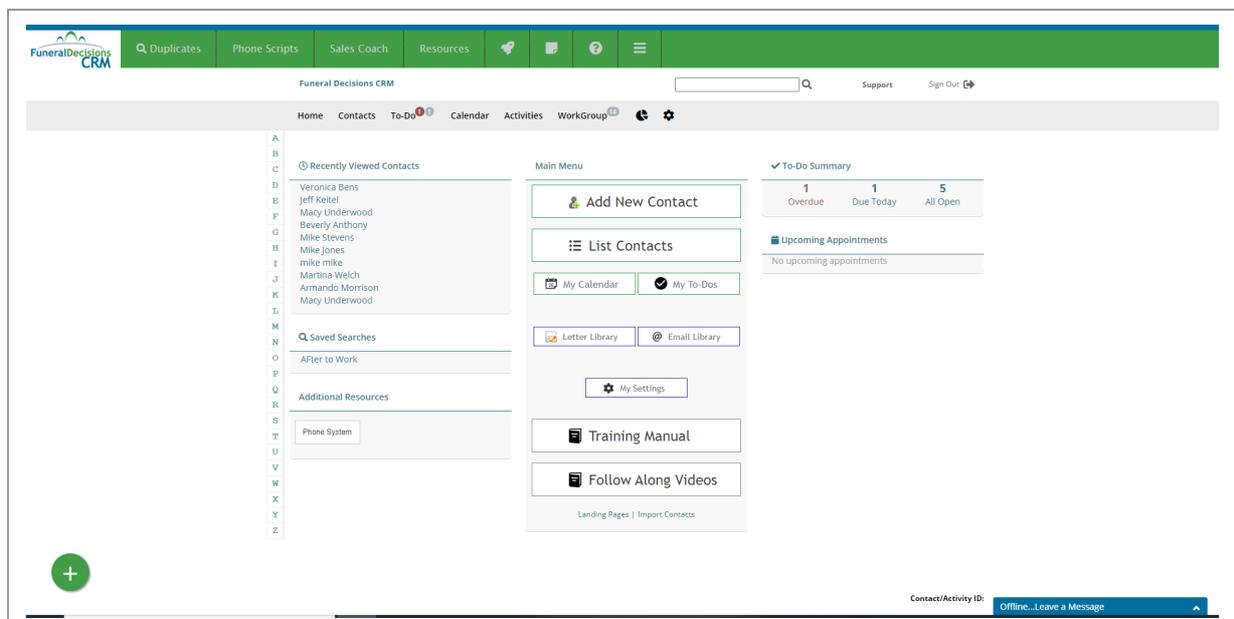
...and that's it!

Emails

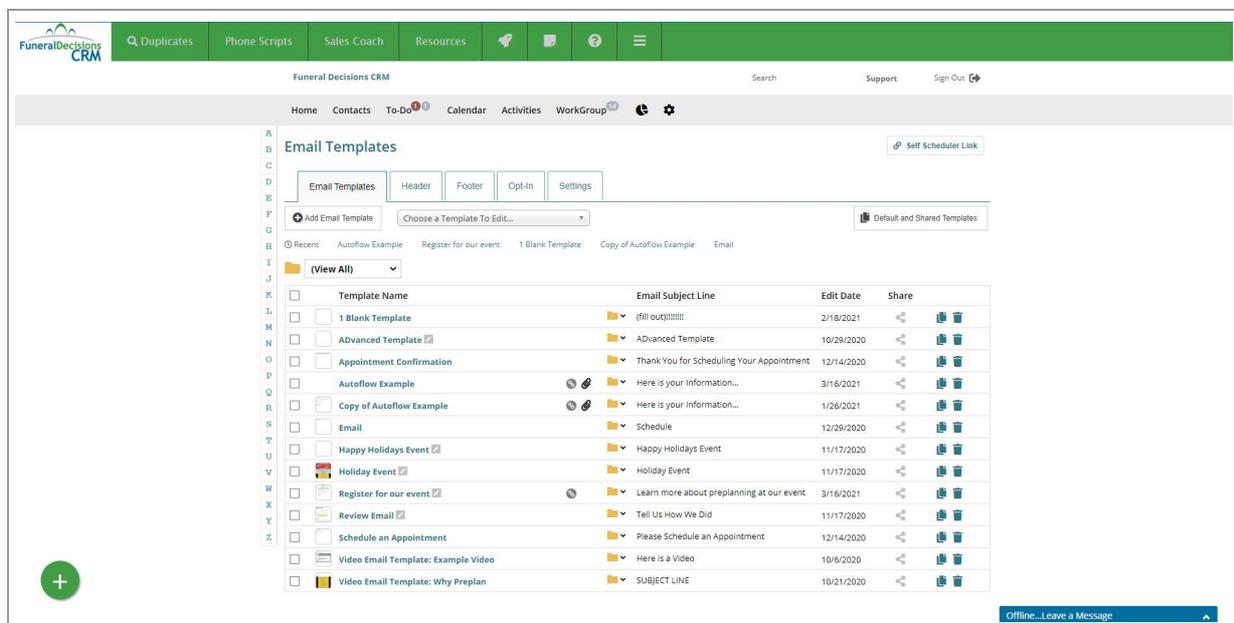
# Creating An Email Template (From Scratch/Word Doc)

FuneralDecisionsCRM

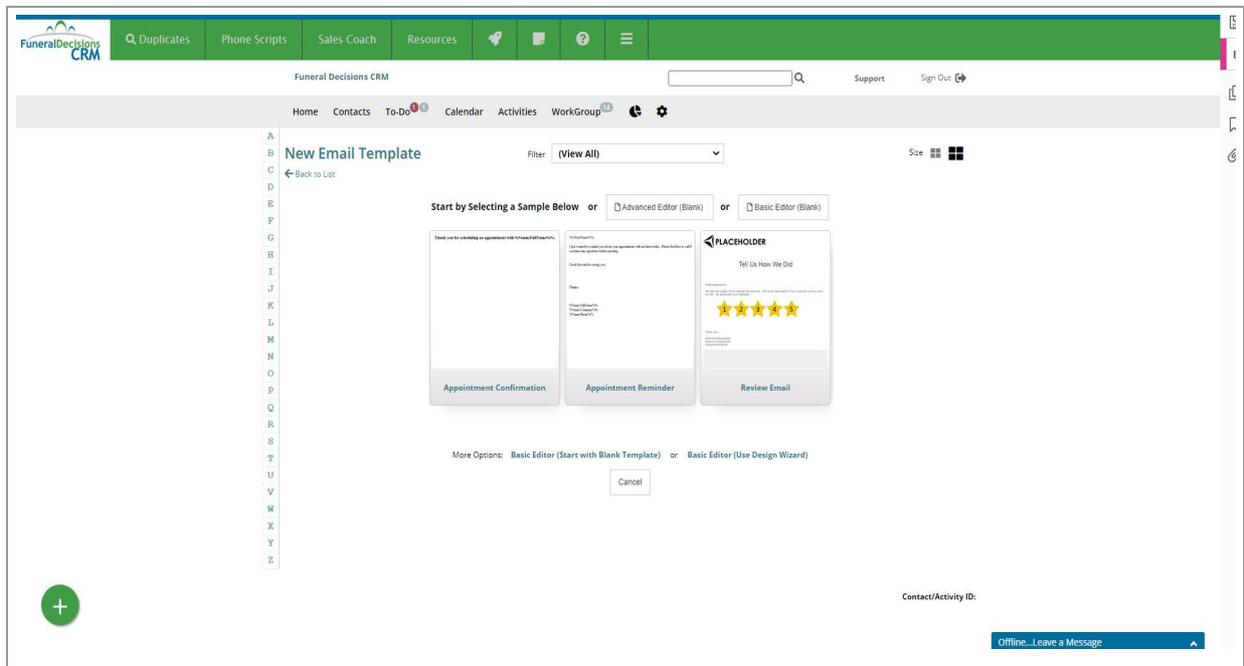
Adding a new email template to the system. It can be one you sit down and write from scratch or one you copy and paste in from another file.



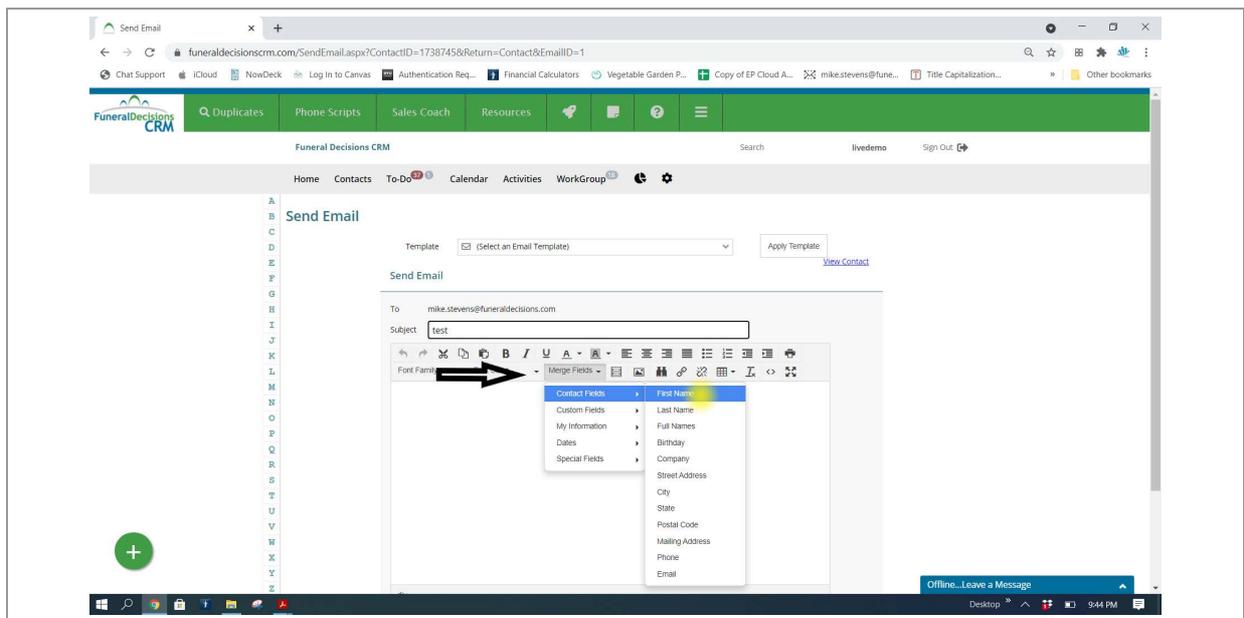
Click on "Email Library"



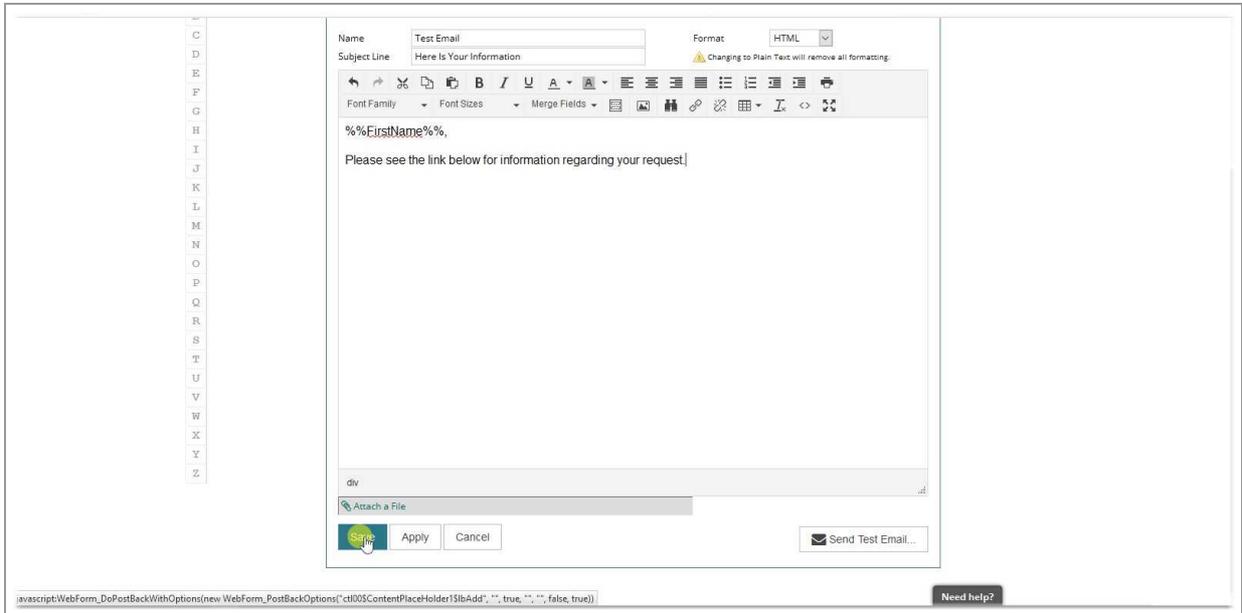
Click on the "Add Email Template" button



1. Select a sample template or advanced or Basic Editor
2. Enter the name of your template. This name is only for identifying the template in the system. It is not shown to the contact.
3. Enter the subject line. This is the email's subject line that the contact will see when they receive the email.



Always use Merge Fields when creating contacts. Merge Fields enable information from the contact record (ie First Name, Last Name, etc) to be pulled when sending the email. For example when sending an email blast to 200 people, you would not want to go in and add in two hundred names by hand. By using the Merge Fields option, the template will automatically pull out and add the names to the template of the 200 people you are sending the email to.

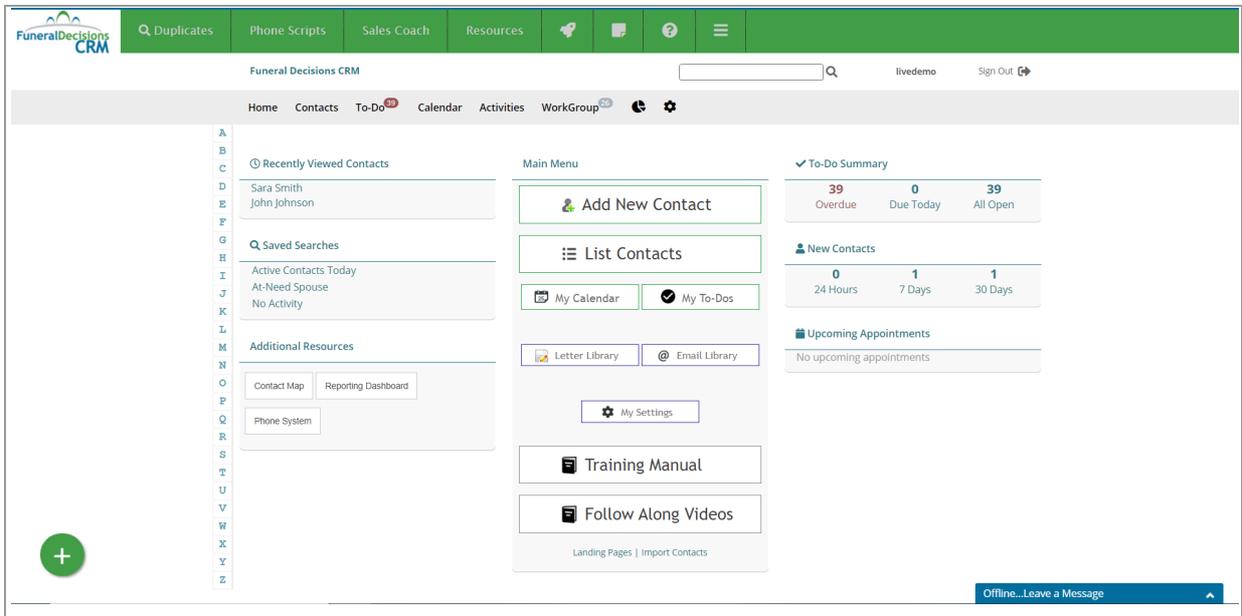


Type in your email or highlight and copy/paste it in from Word or other text file.  
Click on "Save"

# Adding a Shared Template or a Default Template

*FuneralDecisionsCRM*

Find and add a template supplied by your company, Funeral Decisions or a co-worker.



Click on "Email Library"

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

### Email Templates

Self Scheduler Link

Add Email Template Choose a Template To Edit...

Recent test Editor Example Loris Event Event Invite Jens Example

(View All)

| Template Name        | Email Subject Line           | Edit Date  | Share |
|----------------------|------------------------------|------------|-------|
| Editor Example       | Editor Example               | 12/15/2020 |       |
| Event Invite         | Event Invite                 | 5/12/2020  |       |
| Example Email        | Example Email                | 2/5/2019   |       |
| Facebook Reply       | Facebook Reply               | 12/18/2018 |       |
| Feb 2020 Invite      | Feb 2020 Invite              | 1/22/2020  |       |
| Henry's Email        | Henry's Email                | 1/22/2020  |       |
| Holiday Newsletter   | Holiday Newsletter           | 11/20/2018 |       |
| Hospice Newsletter   | Hospice Newsletter           | 4/17/2019  |       |
| Initial Response 1   | Funeral Services Information |            |       |
| Initial Response 2   | Funeral Services Information |            |       |
| January Event Invite | January Event Invite         | 12/12/2019 |       |
| JenniferTest         | JenniferTest                 | 7/16/2019  |       |

Offline...Leave a Message

Click on "Default and Shared Templates"

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

### Email Templates

Self Scheduler Link

Add Email Template Choose a Template To Edit...

Recent test Editor Example Loris Event Event Invite Jens Example

(View All)

| Template Name        | Email Subject Line           | Edit Date | Share |
|----------------------|------------------------------|-----------|-------|
| Editor Example       | Editor Example               |           |       |
| Event Invite         | Event Invite                 |           |       |
| Example Email        | Example Email                |           |       |
| Facebook Reply       | Facebook Reply               |           |       |
| Feb 2020 Invite      | Feb 2020 Invite              |           |       |
| Henry's Email        | Henry's Email                |           |       |
| Holiday Newsletter   | Holiday Newsletter           |           |       |
| Hospice Newsletter   | Hospice Newsletter           |           |       |
| Initial Response 1   | Funeral Services Information |           |       |
| Initial Response 2   | Funeral Services Information |           |       |
| January Event Invite | January Event Invite         |           |       |
| JenniferTest         | JenniferTest                 |           |       |

Select an Email Template to make a copy for your own use.

- Appointment Confirmation
- Appointment Reminder
- Review Email
- Shared Team Templates
- Editor Example
- Event Invite

7/16/2019 Offline...Leave a Message

Click on the desired template

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

### Email Templates

Self Scheduler Link

Add Email Template Choose a Template To Edit...

Recent test Editor Example Loris Event Event Invite Jens Example

(View All)

| Template Name        | Email Subject Line                  | Edit Date  | Share |
|----------------------|-------------------------------------|------------|-------|
| Appointment Reminder | Reminder: Appointment Today With Us | 3/22/2021  |       |
| Editor Example       | Editor Example                      | 12/15/2020 |       |
| Event Invite         | Event Invite                        | 5/12/2020  |       |
| Example Email        | Example Email                       | 2/5/2019   |       |
| Facebook Reply       | Facebook Reply                      | 12/18/2018 |       |
| Feb 2020 Invite      | Feb 2020 Invite                     | 1/22/2020  |       |
| Henry's Email        | Henry's Email                       | 1/22/2020  |       |
| Holiday Newsletter   | Holiday Newsletter                  | 11/20/2018 |       |
| Hospice Newsletter   | Hospice Newsletter                  | 4/17/2019  |       |
| Initial Response 1   | Funeral Services Information        |            |       |
| Initial Response 2   | Funeral Services Information        |            |       |
| January Event Invite | January Event Invite                | 12/12/2019 |       |

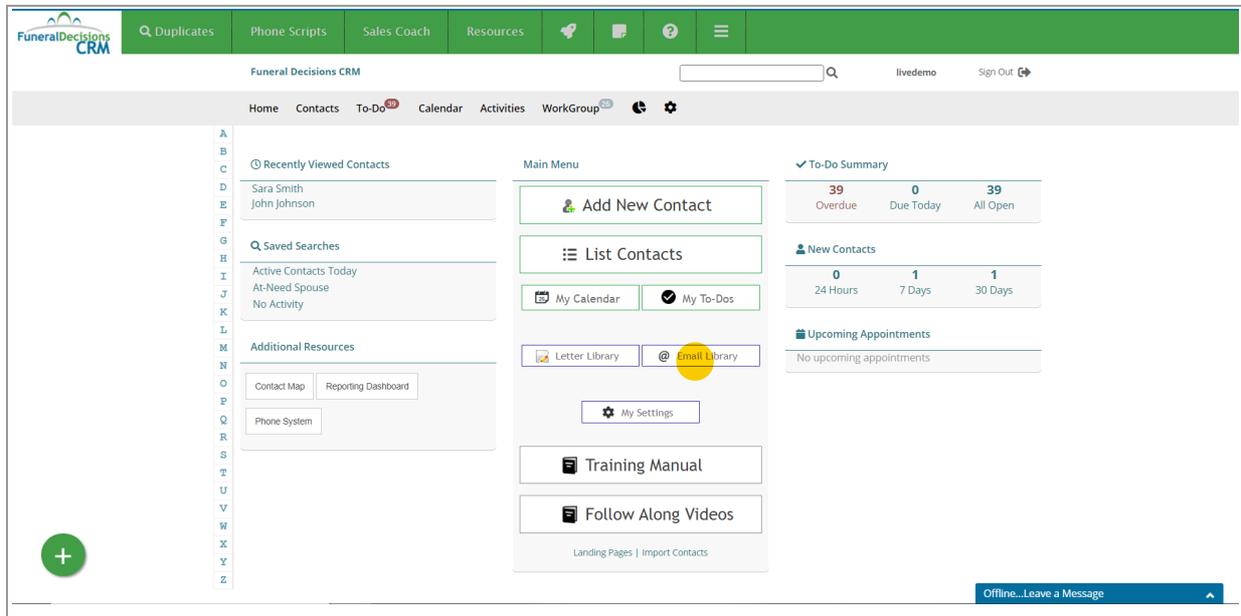
Offline...Leave a Message

The template is now added to your system and ready to use or edit

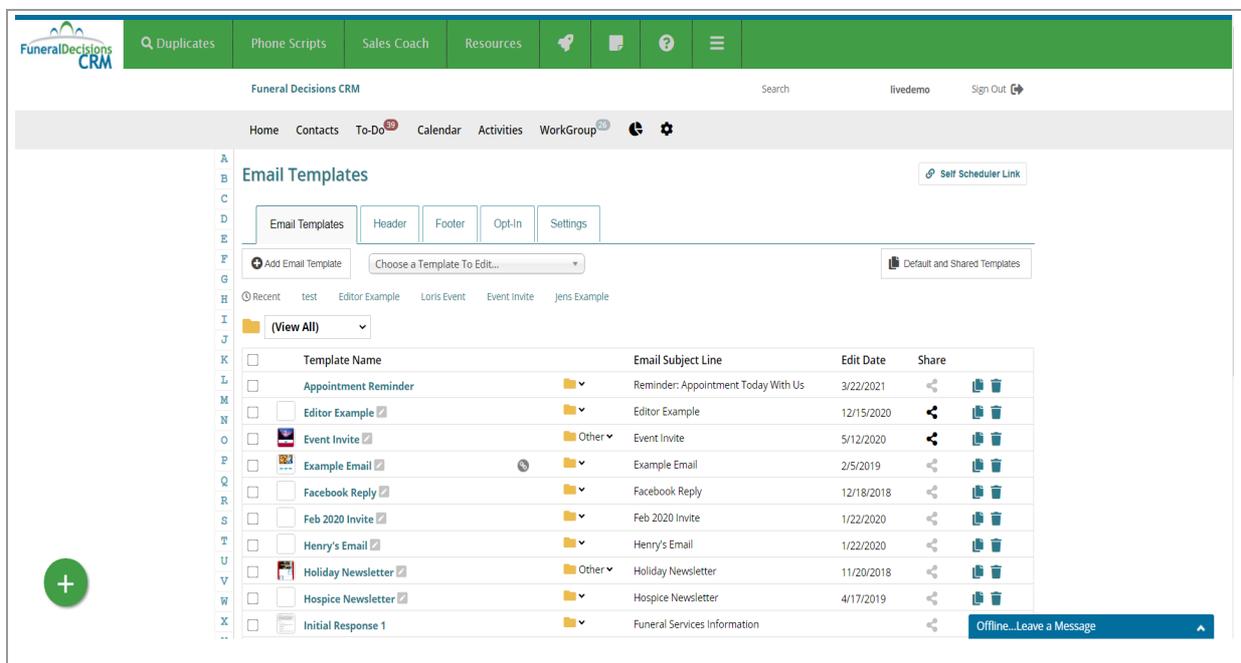
# Edit An Existing Template

FuneralDecisionsCRM

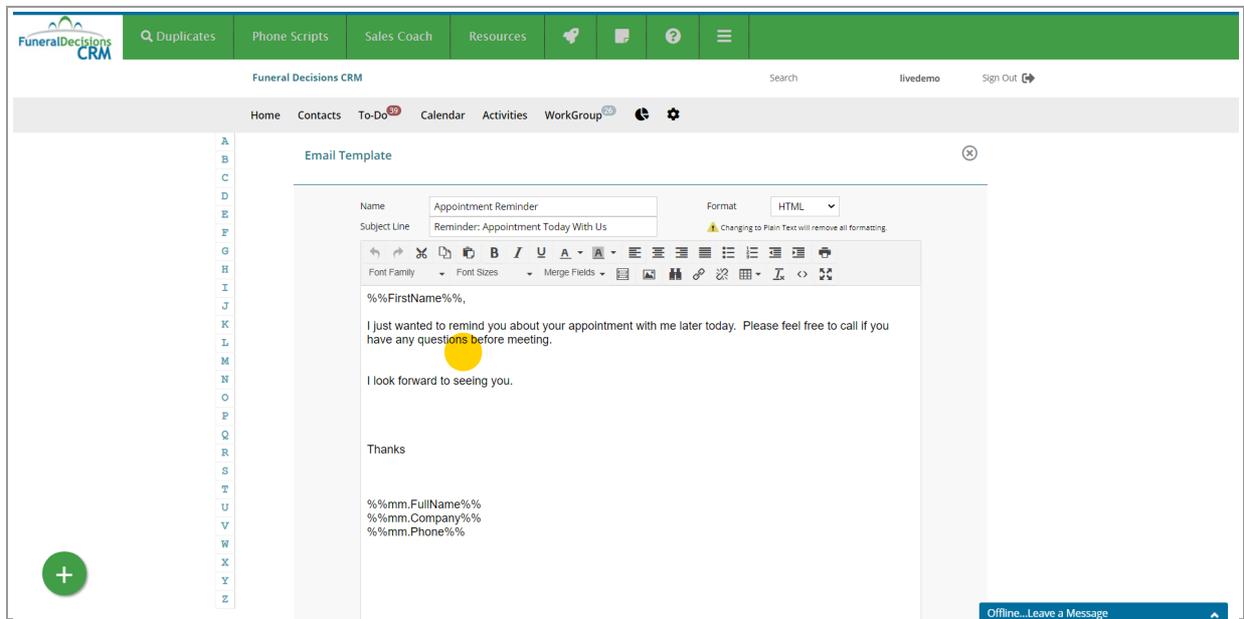
Edit a template that is currently in your template library.



Click on "Email Templates"



Click on the email template you wish to edit

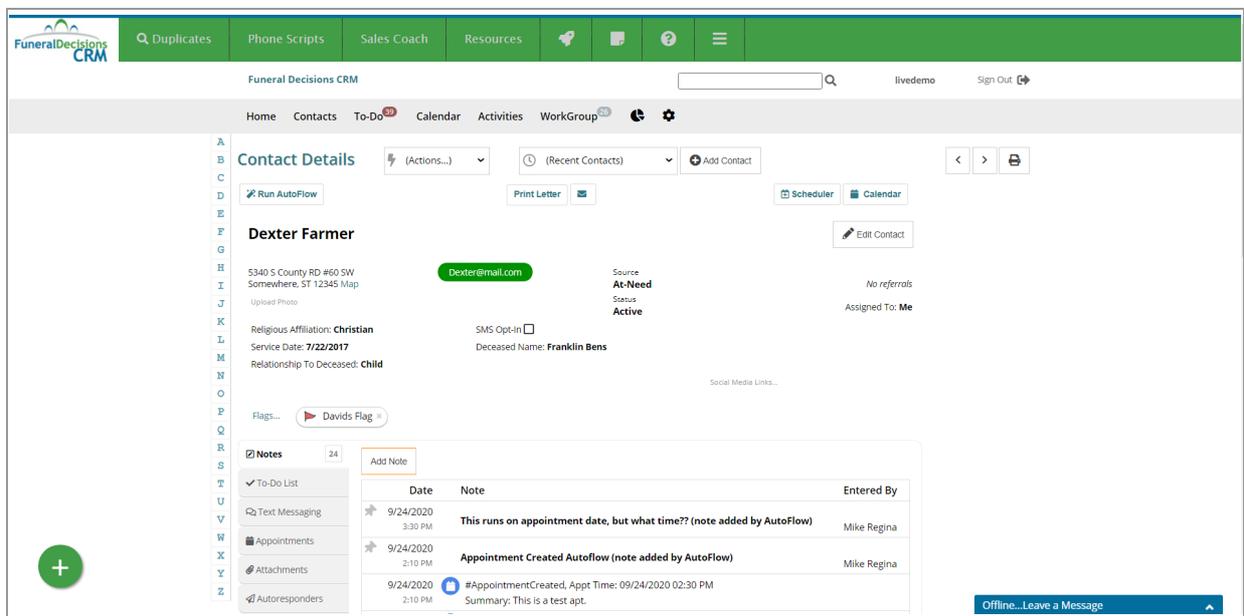


Edit the template as need and click "Save"

# Opt-In a Contact So You Can Send An Email

*FuneralDecisionsCRM*

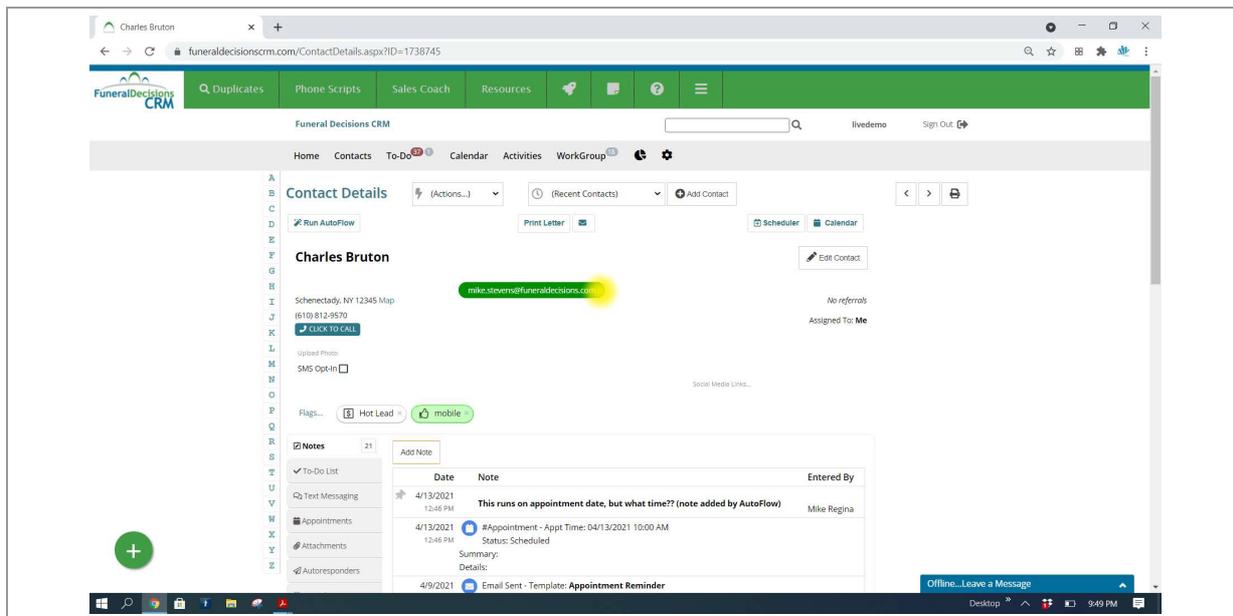
Before you can begin sending emails to a consumer, you'll need to opt-in their email address. The vast majority of the time, if someone gave you their email they are giving you permission to send them an email.



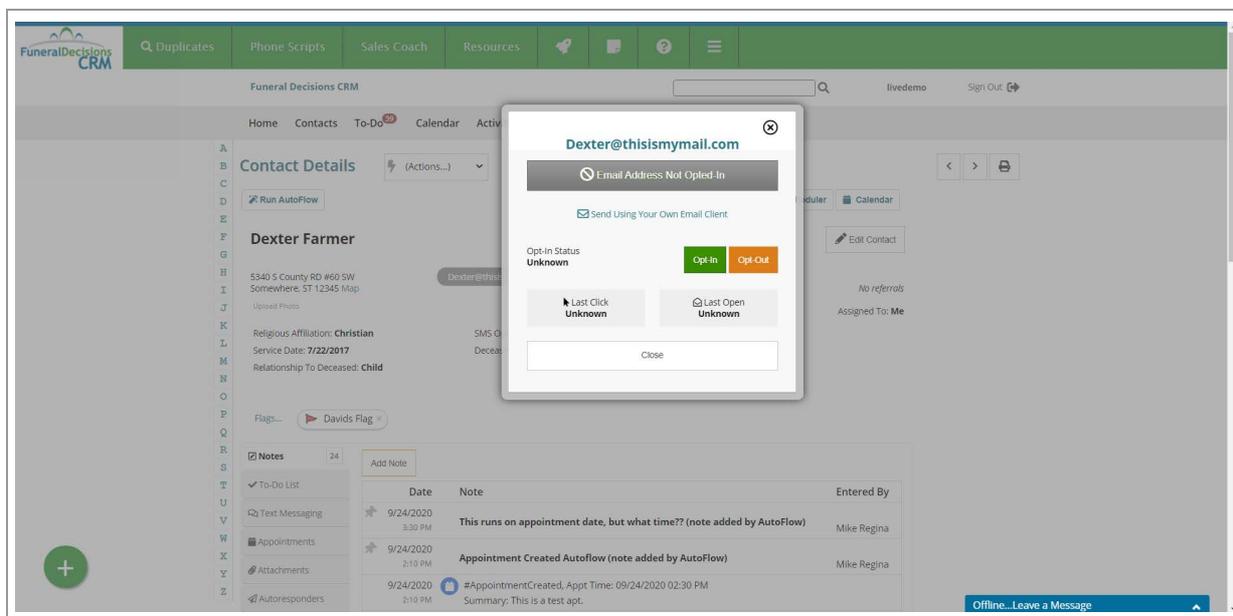
Notice how this email address is gray. This indicates that the contact's email is not opted-in and therefore cannot be sent emails.

To Opt-In a contact

# To Opt-In a contact



Click on Email of the contact

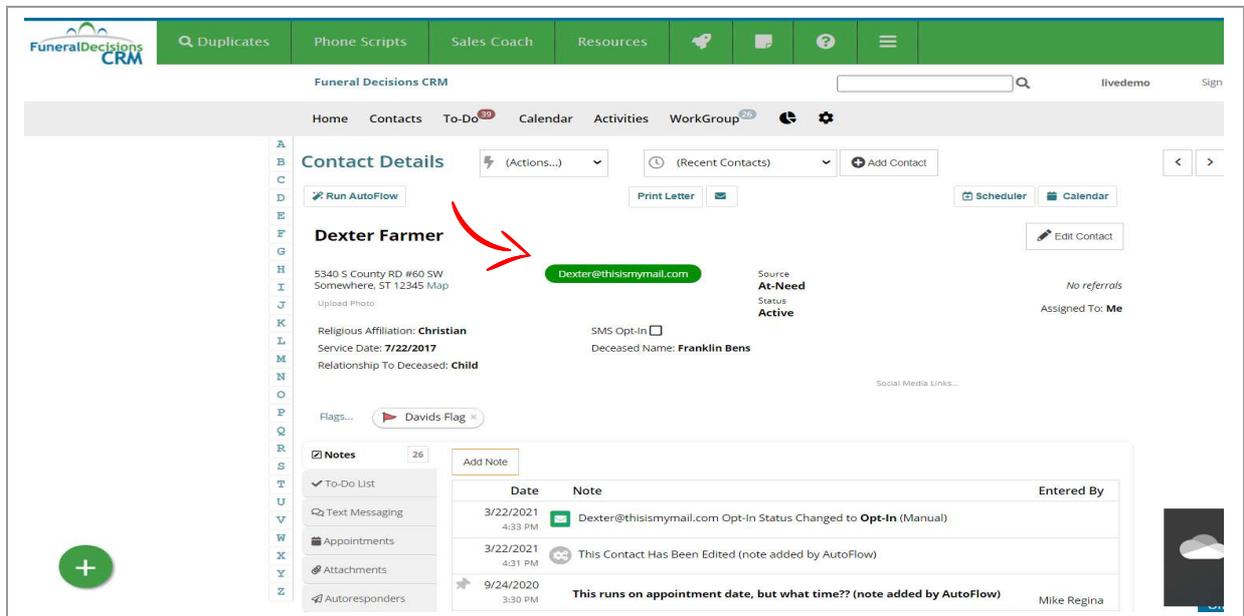


Click the Opt-in Button.

The screenshot displays the FuneralDecisions CRM interface. At the top, there is a navigation bar with tabs for 'Duplicates', 'Phone Scripts', 'Sales Coach', and 'Resources'. Below this, the main header shows 'FuneralDecisions CRM' and a search bar. The left sidebar contains a vertical list of letters from A to Z, with a green plus icon at the bottom. The main content area is titled 'Contact Details' and shows information for 'Dexter Farmer', including his address, religious affiliation (Christian), service date (7/22/2017), and relationship to the deceased (Child). A modal window is open in the center, titled 'Dexter@thisismymail.com'. It features a 'Send Email' button, an 'Opt-In Status' section with 'Opt In 3/22/2021 via Manual' and an 'Opt-Out' button, and two 'Unknown' buttons for 'Last Click' and 'List Open'. A 'Close' button is at the bottom of the modal. Below the contact details, there is a 'Notes' section with a table of notes:

| Date              | Note  | Entered By  |
|-------------------|---|-------------|
| 3/22/2021 4:33 PM | Dexter@thisismymail.com Opt-In Status Changed to Opt-In (Manual)        |             |
| 3/22/2021 4:31 PM | This Contact Has Been Edited (note added by AutoFlow)                   |             |
| 9/24/2020 3:30 PM | This runs on appointment date, but what time?? (note added by AutoFlow) | Mike Regina |

The opt-in button will disappear and the Email will turn green.

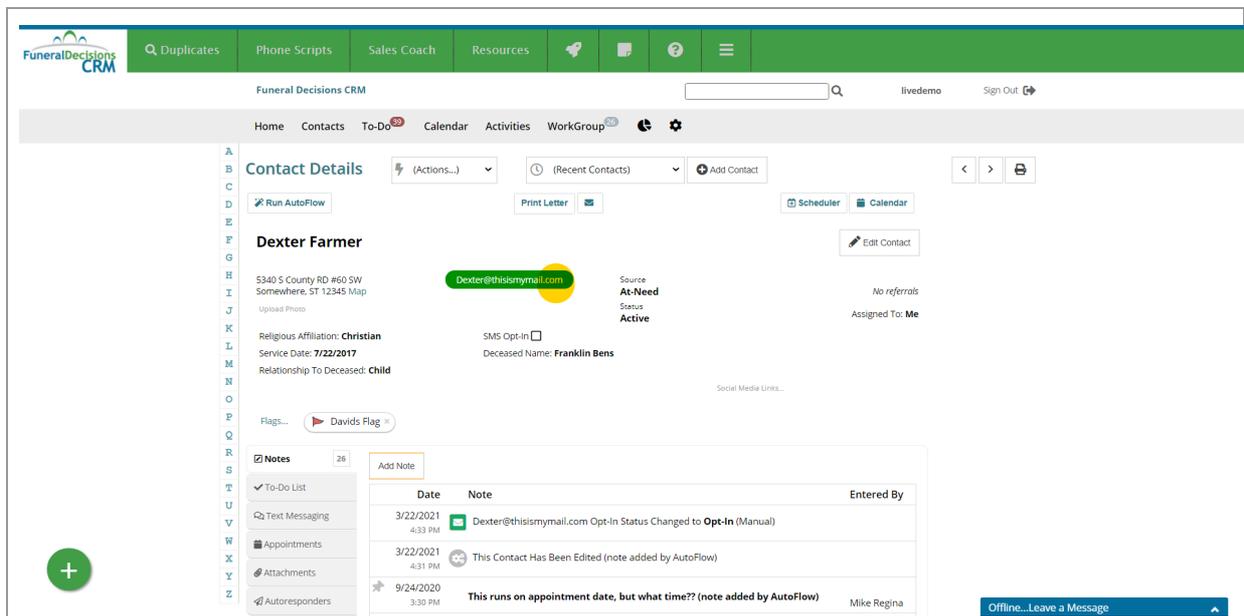


Notice the email is now green. You are now able to send this contact emails.

# Sending An Email

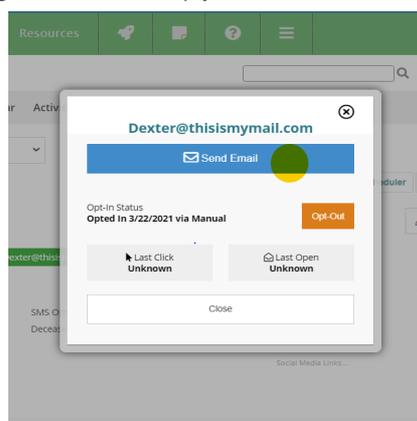
FuneralDecisionsCRM

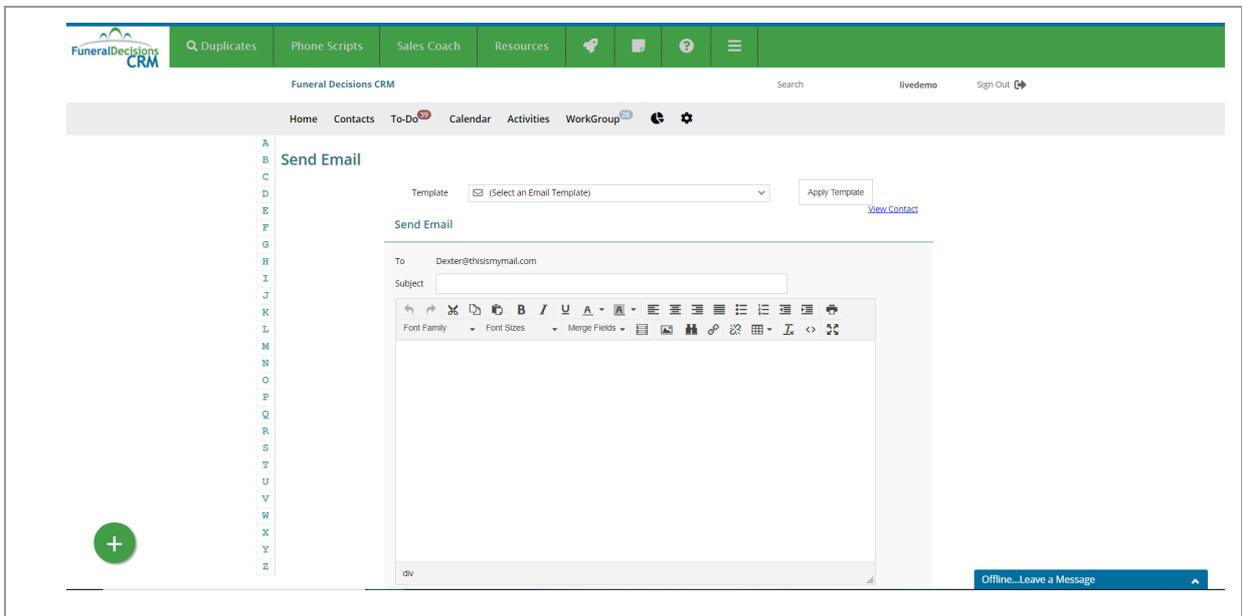
How to send an email to a single contact.



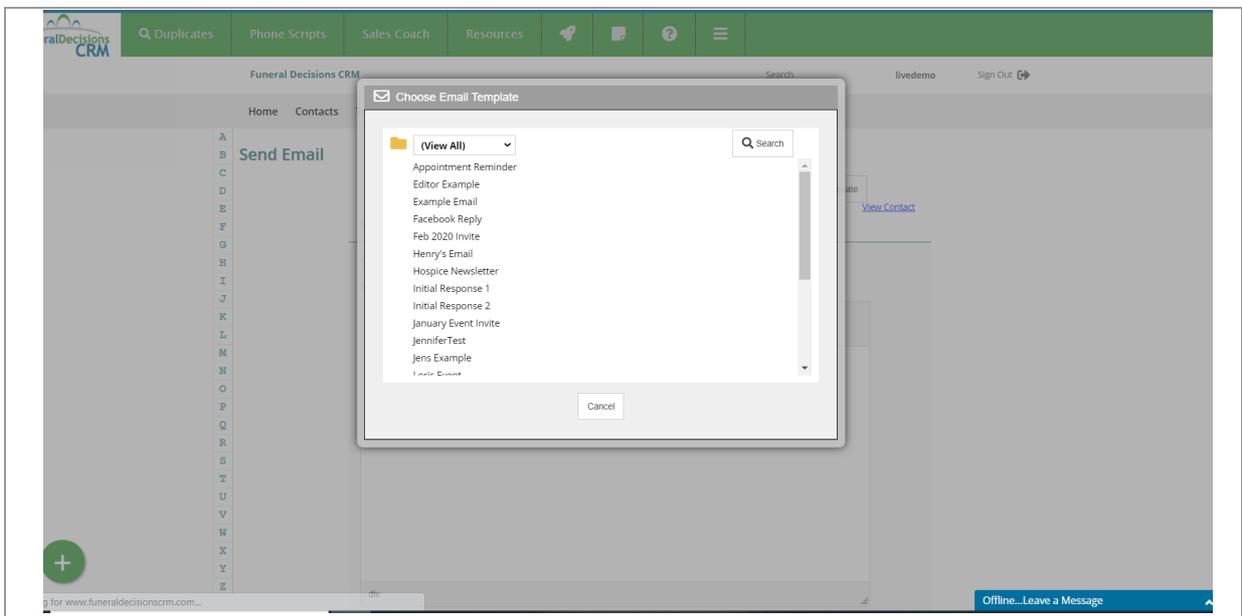
To send an email to an opted-in contact (they have a green email), simply click on their email.

Click on the send Email from this pop up box.



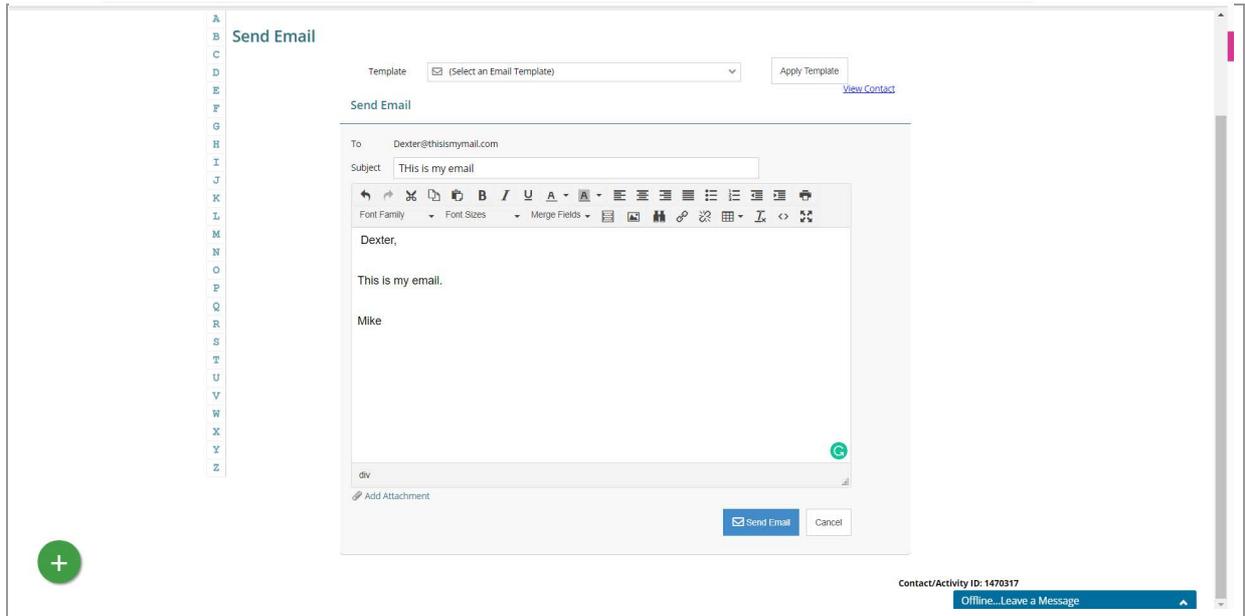


If you are sending an existing template 1.) click on the drop down menu directly above the email editor and then 2.) select your email template.

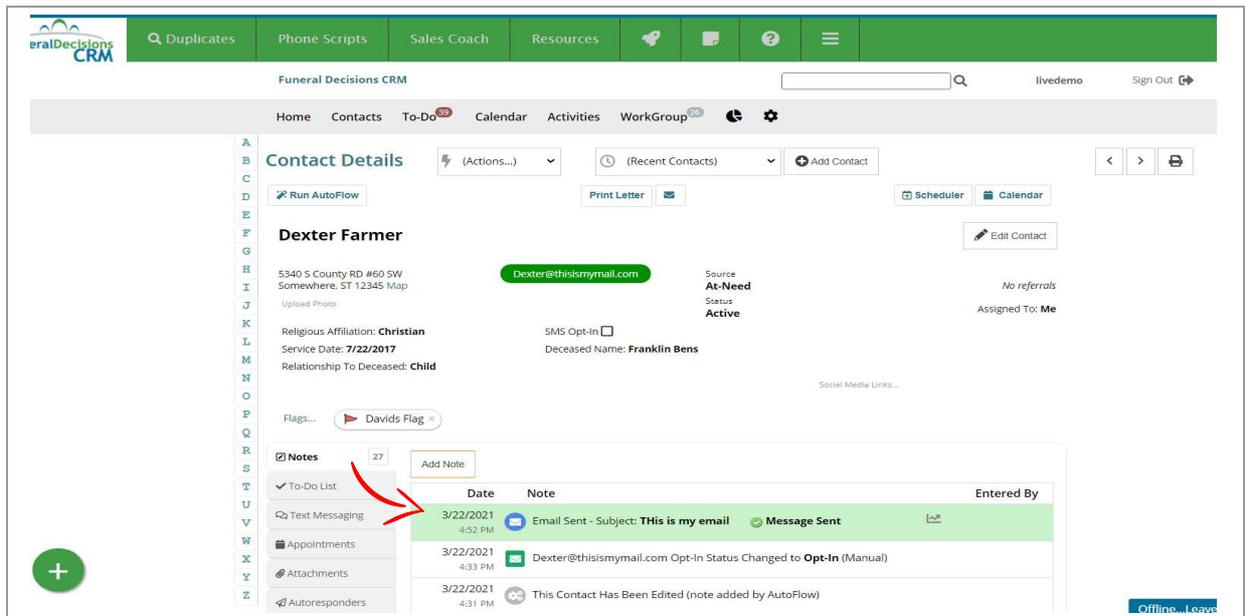


If you are writing an email from scratch then enter a subject line and then type your message in the email editor.

To add an attachment, simply click on the "Add Attachment" link below the editor and select your file.



Click "Send Email" to send the message.

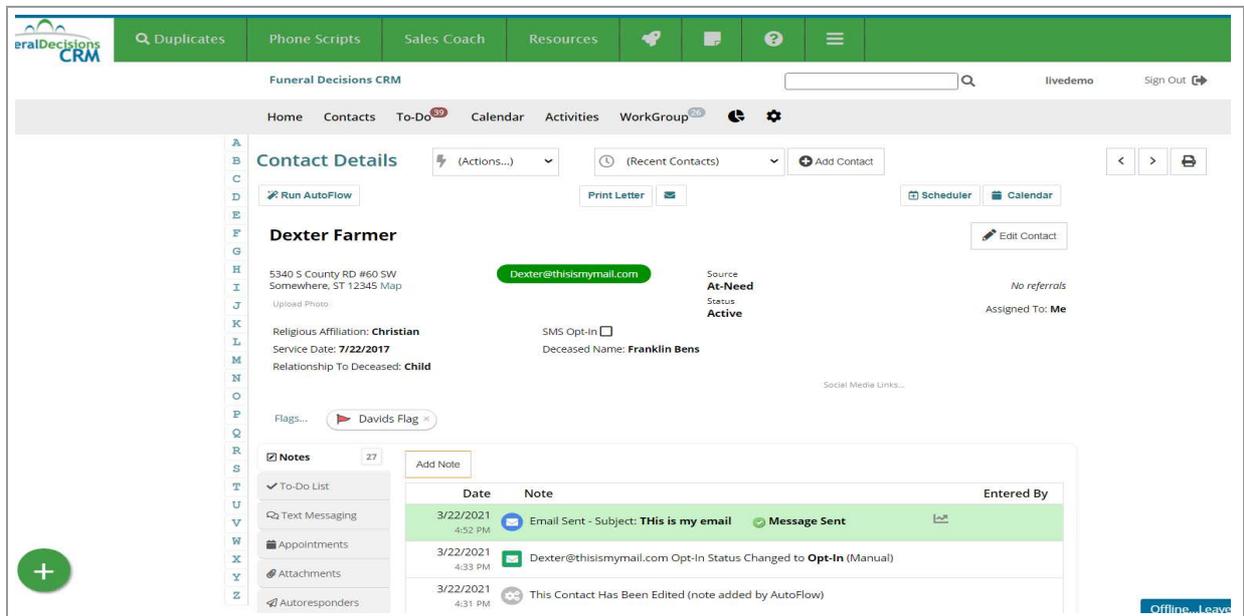


You will see the email shows up automatically in the notes section of the contact record.

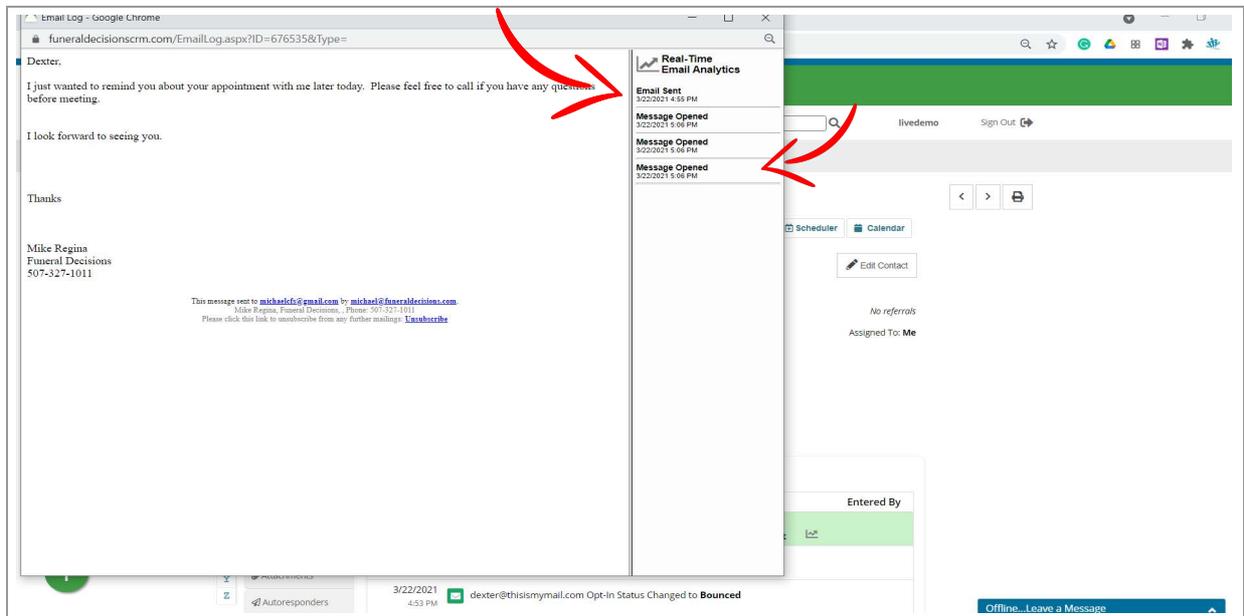
## Email Analytics

FuneralDecisionsCRM

Email analytics enable you to see exactly what was sent when to the contact, when the email was opened and if you included a link or attachment, when that was clicked/downloaded.



To access the analytics, 1.) go to the contact that you sent the email to.  
 2.) Click on the arrow/chart icon directly across from the "Email Sent:...." note.



This screen shows you the message sent and then the date/time stamp for when the email was sent, opened and clicked.

## Sending Email Blasts

FuneralDecisionsCRM

You can send an email to 100 people just as easy as you can to 1 person.

FuneralDecisions CRM

Home Contacts To-Do<sup>39</sup> Calendar Activities WorkGroup<sup>23</sup>

Contacts (Recent Contacts) Add Contact

Basic Search Advanced Search

Category Status Source Flag Team Database

Columns: My View Viewing all 36 records. Send Results to WorkGroup

| Name               | Status         | Last Note | Status    | Source        | Team Member | Email                |
|--------------------|----------------|-----------|-----------|---------------|-------------|----------------------|
| Smith, Sara        | Deceased       | 3/18/2021 |           | Register Book | Me          | sara@somethin.com    |
| Stevens, Mike      | Inactive       | 4/28/2020 | Sold      | Phone Shopper | Me          | mike@mail.com        |
| Farmer, Dexter     | Lost           | 3/22/2021 | Active    | At-Need       | Me          | michaelcfs@gmail.com |
| Smith, John        | Partial Sale   | 8/5/2019  |           |               | Me          | JohnaSmith@aol.com   |
| Bruton, Charles    | Sold           | 2/14/2020 |           |               | Me          |                      |
| Wasserburg a DE, . | Sort of Active | 5/10/2020 |           |               | Me          |                      |
| Mathews Wyatt, .   | (empty)        | 5/26/2020 |           |               | Me          |                      |
| Smith, Tara        | (not empty)    | 6/11/2020 | Active    | unknown       | Me          |                      |
| Wireless Caller, . |                | 8/10/2020 |           |               | Me          |                      |
| Wireless Caller, . |                | 8/10/2020 | 8/10/2020 |               | Me          |                      |
| Johnson, John      |                | 8/27/2020 | 8/27/2020 | Active        | Me          |                      |
| Smith, Tim         |                | 12/3/2020 | 12/3/2020 | Active        | Me          |                      |
|                    |                | 8/21/2018 | 8/27/2020 | Active        | Me          |                      |

Offline...Leave a Message

1. First you will need to filter your contacts. If you do not know how to filter contacts, please see how to filter and work with groups.
2. After you have your database filtered as needed, click on " Send Results to ClientTouch"

FuneralDecisions CRM

Home Contacts To-Do<sup>39</sup> Calendar Activities WorkGroup<sup>23</sup>

WorkGroup Clear Workgroup Add Everyone

Actions Add Contacts Remove Contacts Manage

Contacts in Workgroup: 36

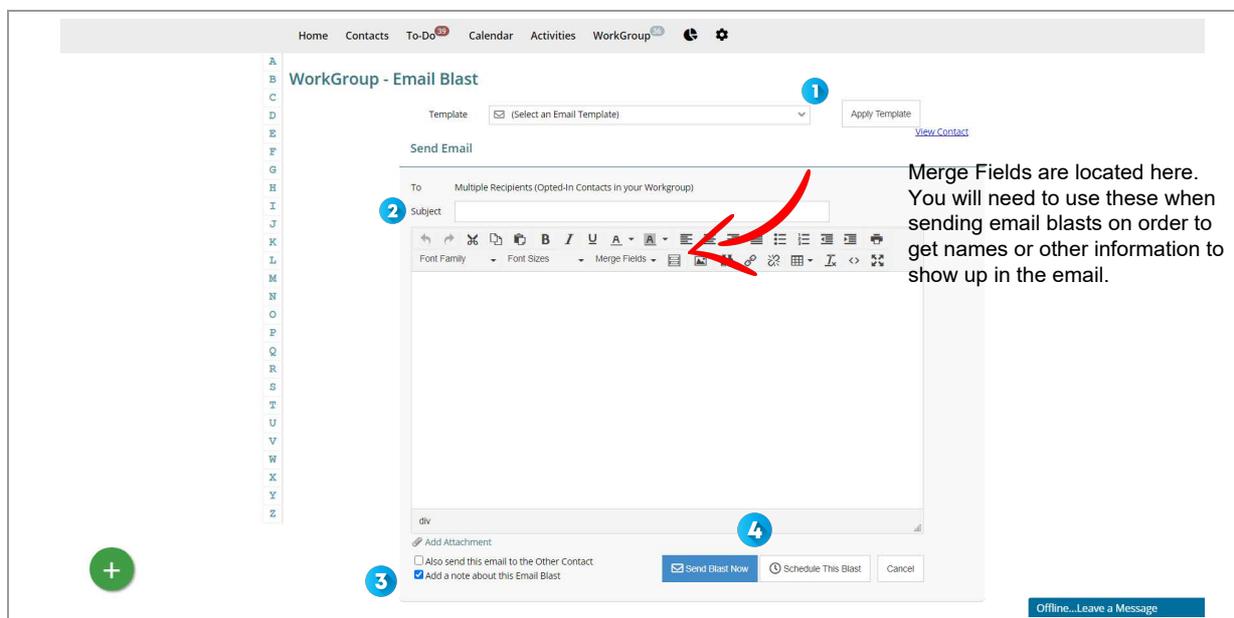
36 contact(s) added. 0 duplicates skipped. 0 excluded that were marked inactive.

Things You Can Do With Your Workgroup

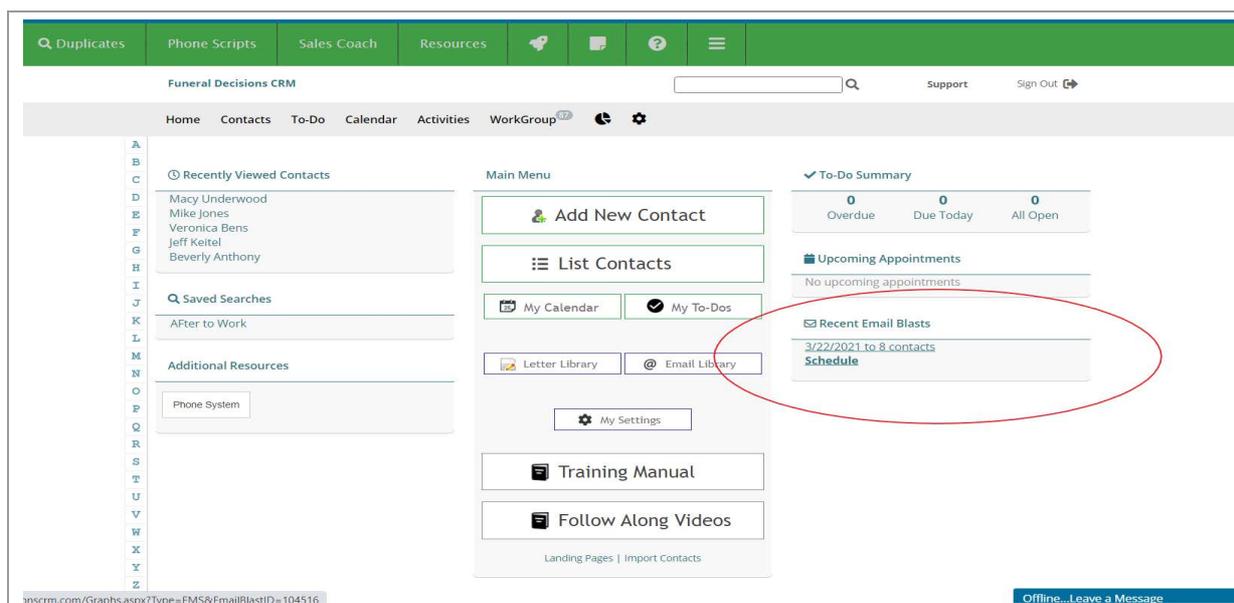
| Online                 | Offline        | Notes & To-Dos      | Utilities             |
|------------------------|----------------|---------------------|-----------------------|
| Email Blast            | Letters        | Batch Add Note      | Group Edit            |
| Email Opt-In Wizard    | Mailing Labels | Assign a To-Do      | Download Address List |
| Autoreponder Campaigns | Envelopes      | Assign a To-Do Plan | Export Data           |

Offline...Leave a Message

1. Note the number of contacts in the system. If you wish to remove specific users, you can do so with the "Remove Contacts" tab or the "Manage" tab.
2. Click on the "Email Blast" button.



1. Select your template OR if you are writing an email from scratch, go to step 2.
2. Enter your subject line and then type your email in the email editor. IMPORTANT...because you are sending an email to more than one person, you will need to use the Merge Fields in order to add the contact's name (or other information) to the email.
3. Check "Add a note about this Email Blast" so that a note gets appended to the contact's record.
4. Click "Send Blast Now" or "Schedule This Blast" to send at a later date.



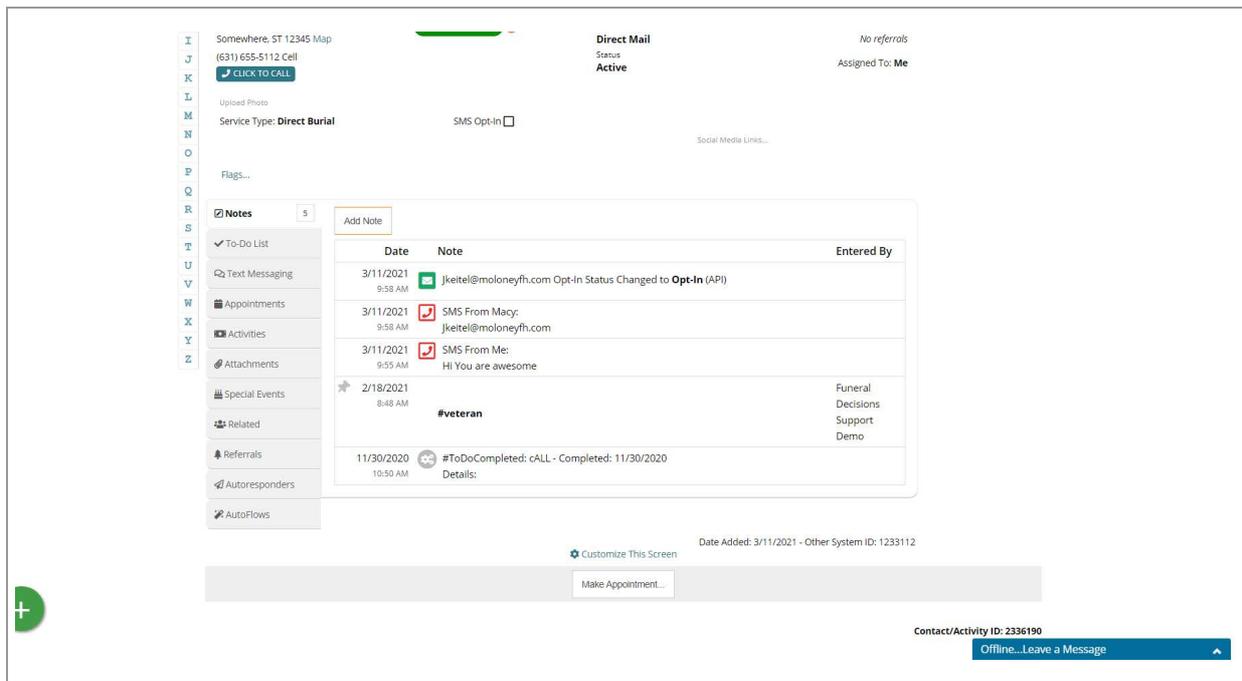
Information about the email blast shows up on the home page. You can view the open rate, click rate, and other metrics by clicking on the "Email Blast Analytics" link.

## Launch An Autoresponder Campaign

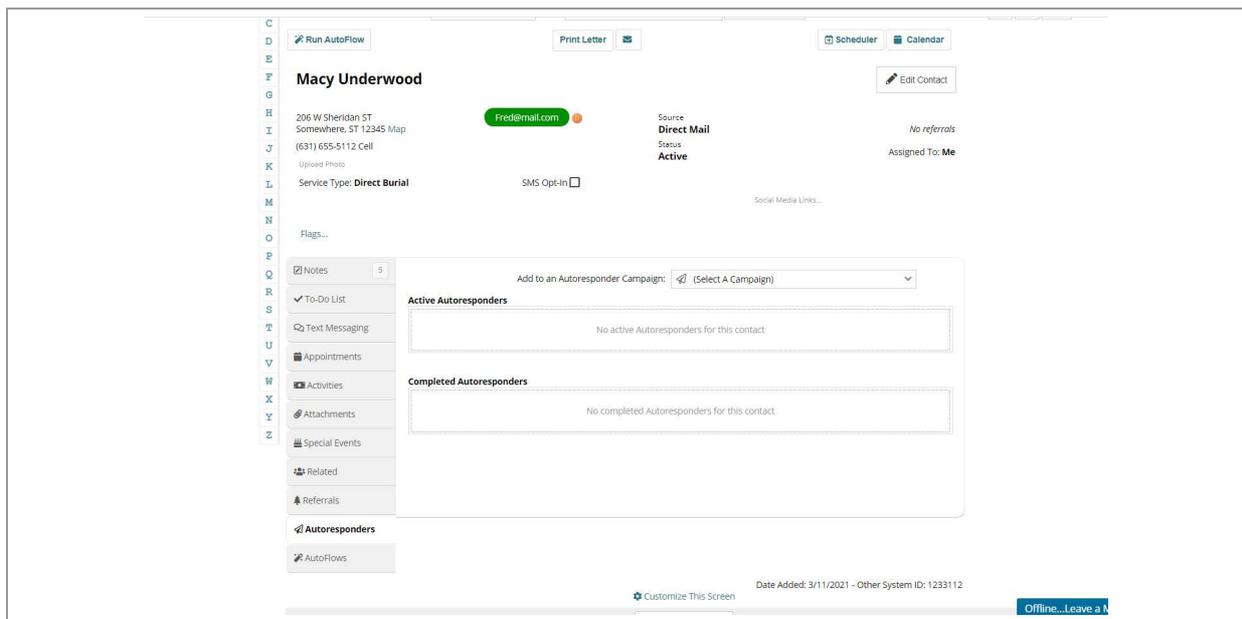
FuneralDecisionsCRM

Launch an autoresponder

# To Turn On an Autoresponder for a Single Contact



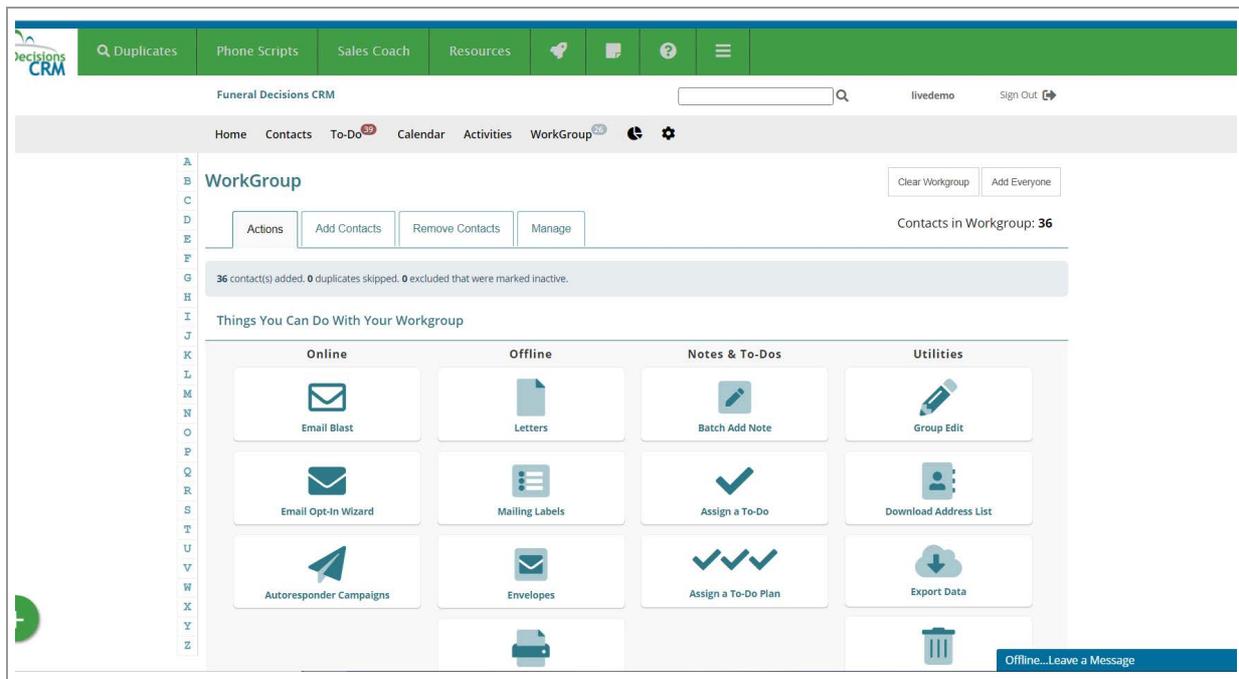
Go into the contact record you wish to have on a campaign and click on the "Autoresponders" tab



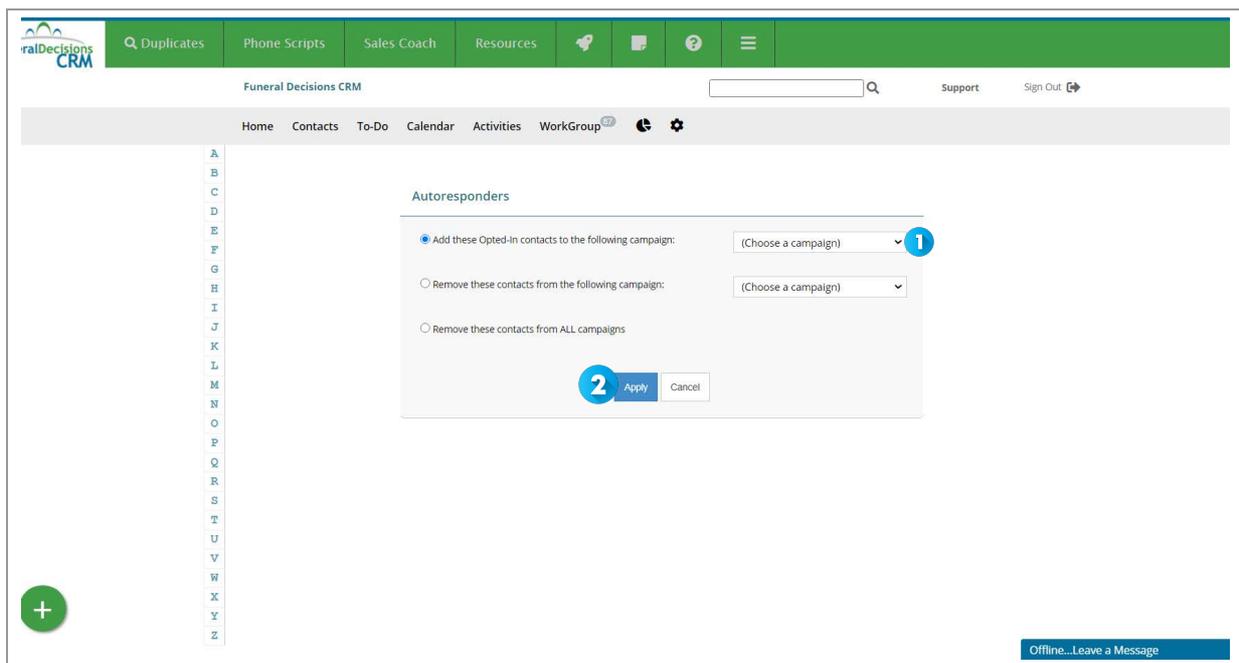
From the drop down menu, select the campaign you wish to run for the contact.

...and that's it!

# Put a Group of Contacts on a Campaign



1. Filter your contacts as needed (see tutorial on filtering if needed) and add to ClientTouch
2. Click on "Autoresponder Campaigns"



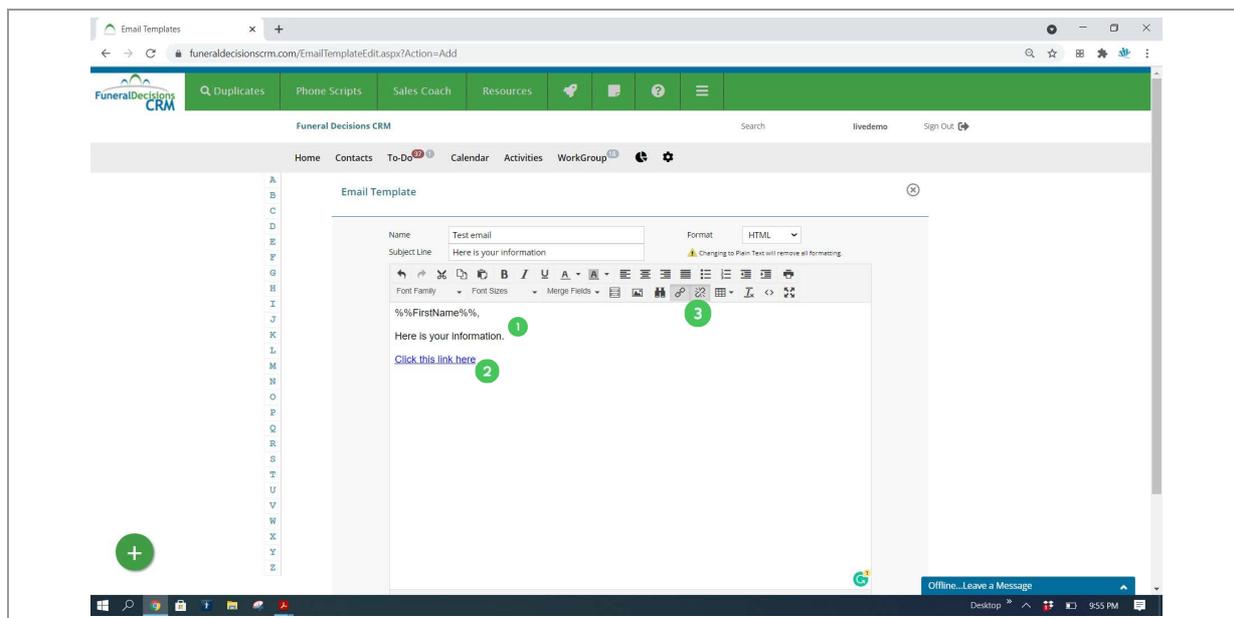
Then select the campaign name from the drop down (or likewise, remove them from a campaign) and click "Apply".

## Using Intelligent Links

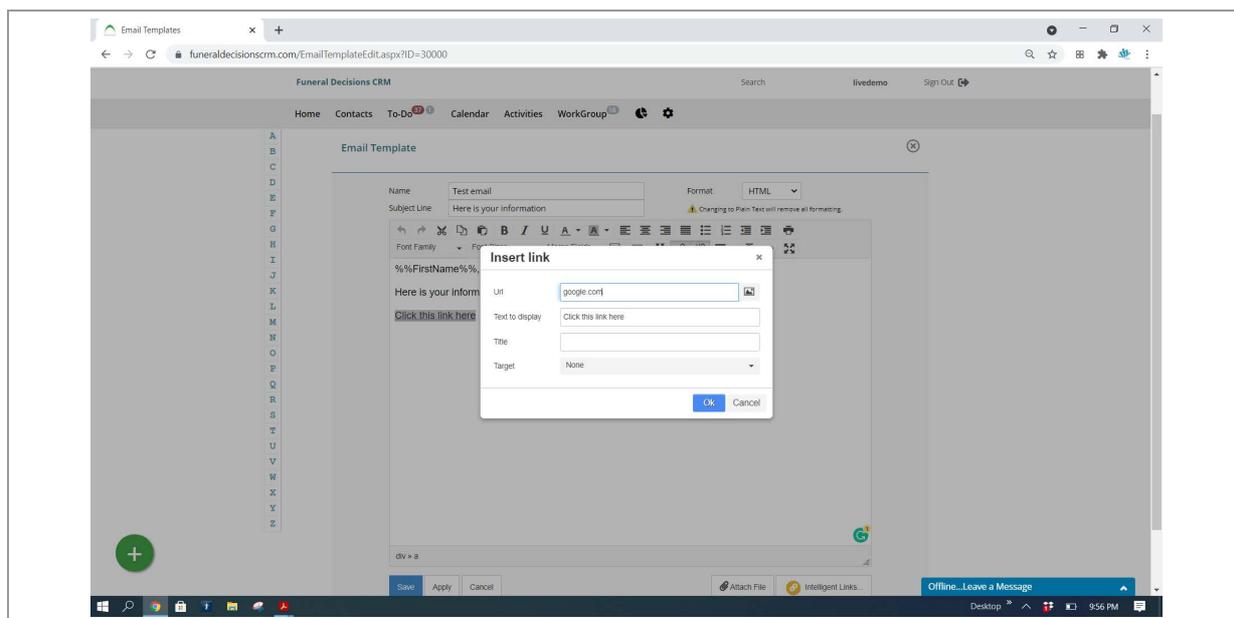
*FuneralDecisionsCRM*

Intelligent links are a great way to use the sales and marketing automation tools found in the system via link clicks in an email. Say for instance that you want to be alerted the second a person clicks on the link to the GPL that you sent them and flags them as being a 'hot lead'. This is what intelligent links do.

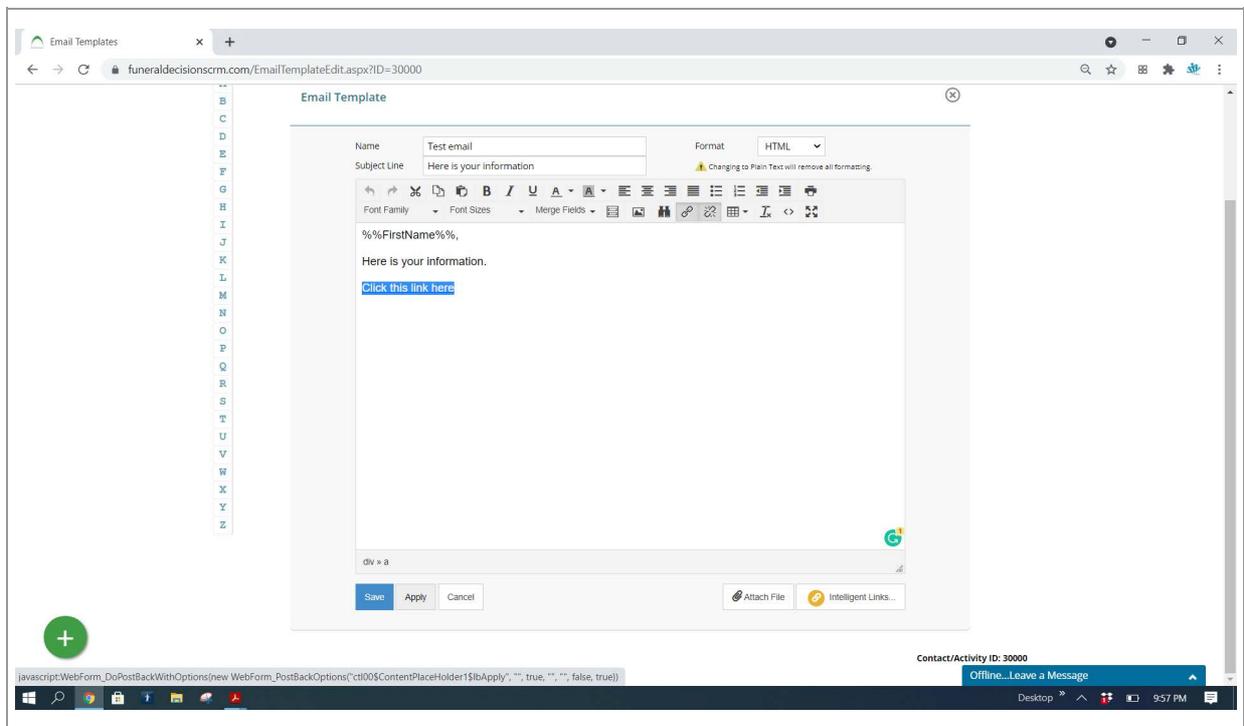
## Add an Intelligent Link to your template...



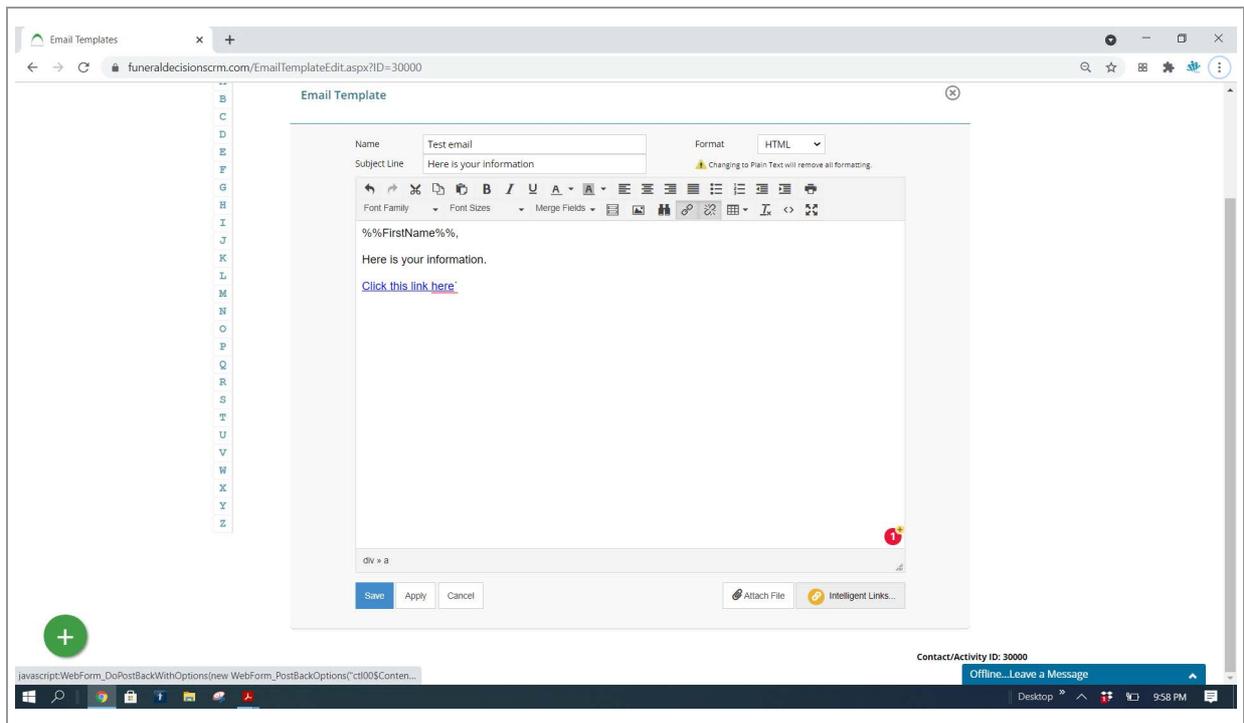
1. Write (or edit an existing) template
2. Highlight the text where the link is going to be
3. Click on the "Insert/Edit Link" button...it looks like a chain link.



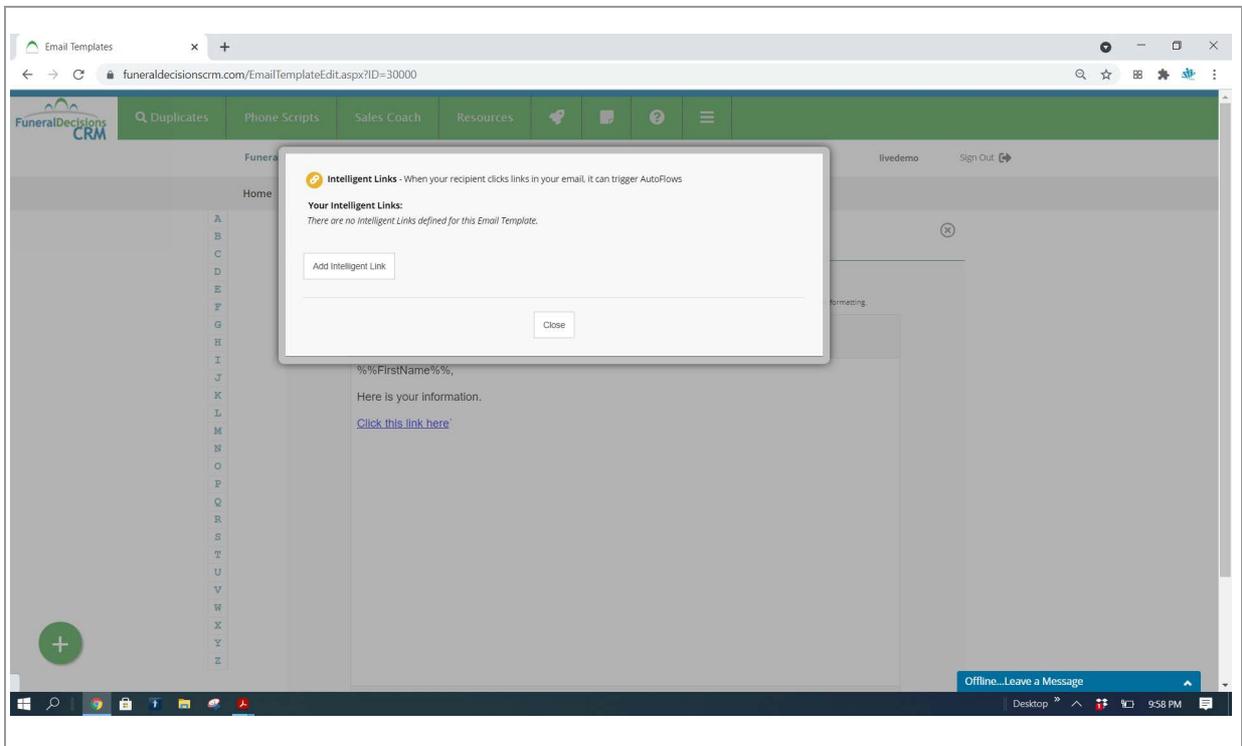
- Paste in the URL to the file (make sure you include the "http://")
- Click OK



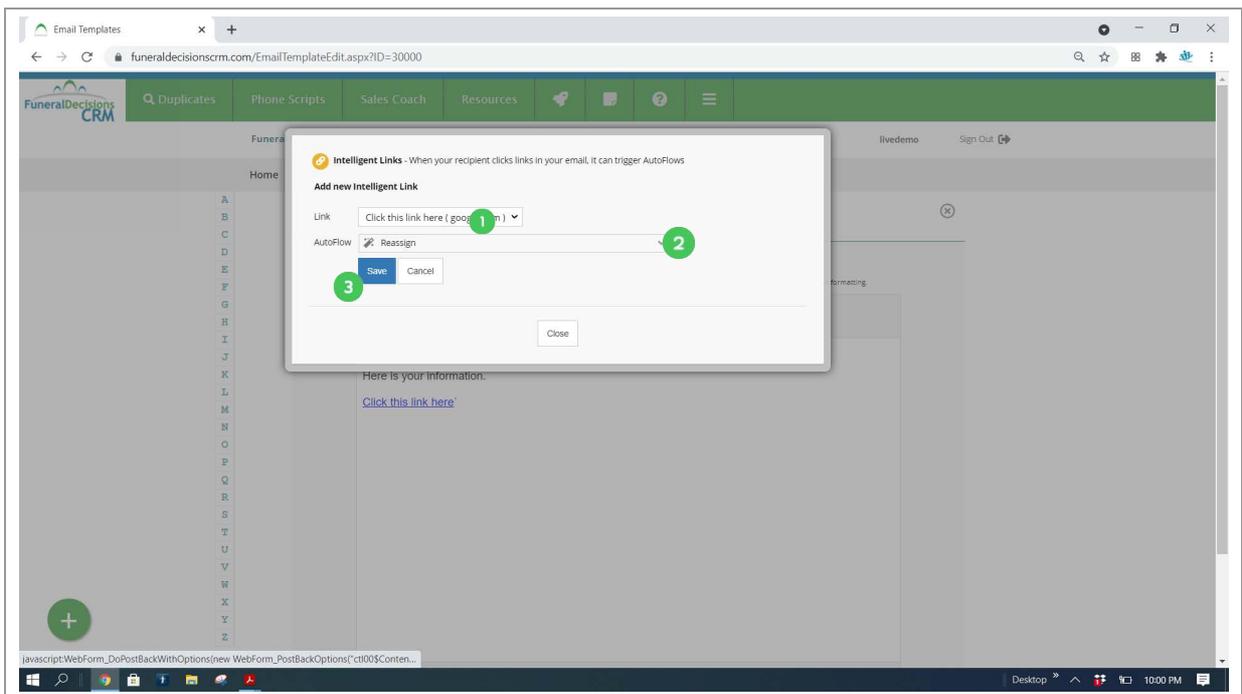
Click the "Apply" button



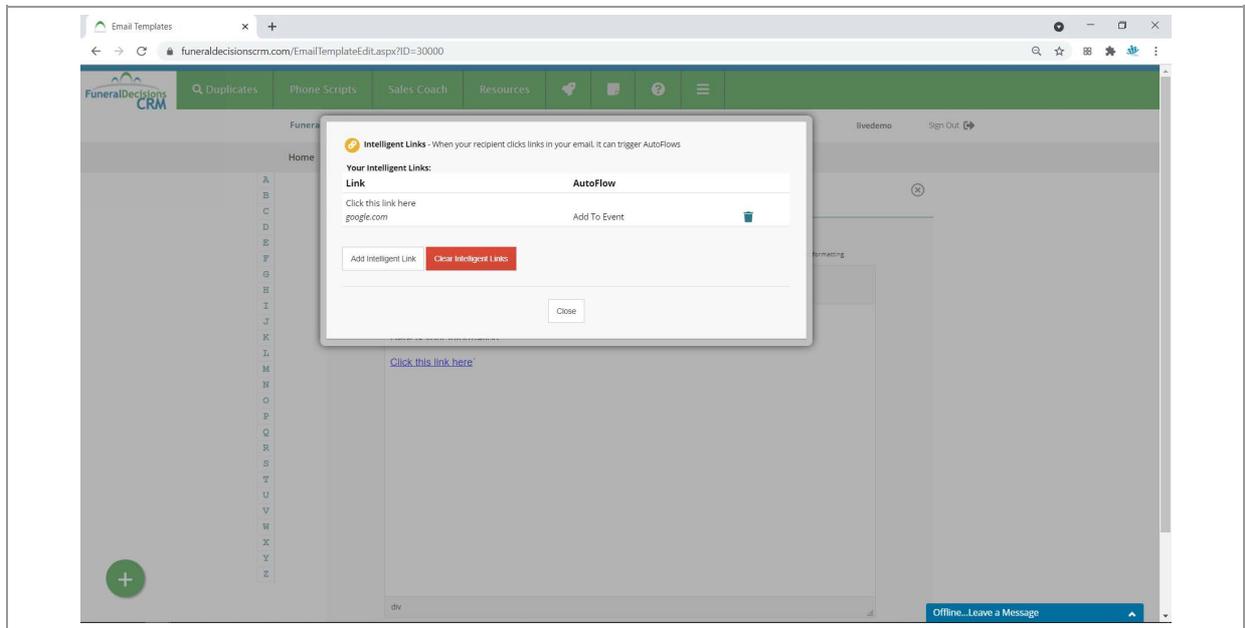
Now click on the "Intelligent Links..." button. Please note you need to click the "Apply" button before you can do this step.



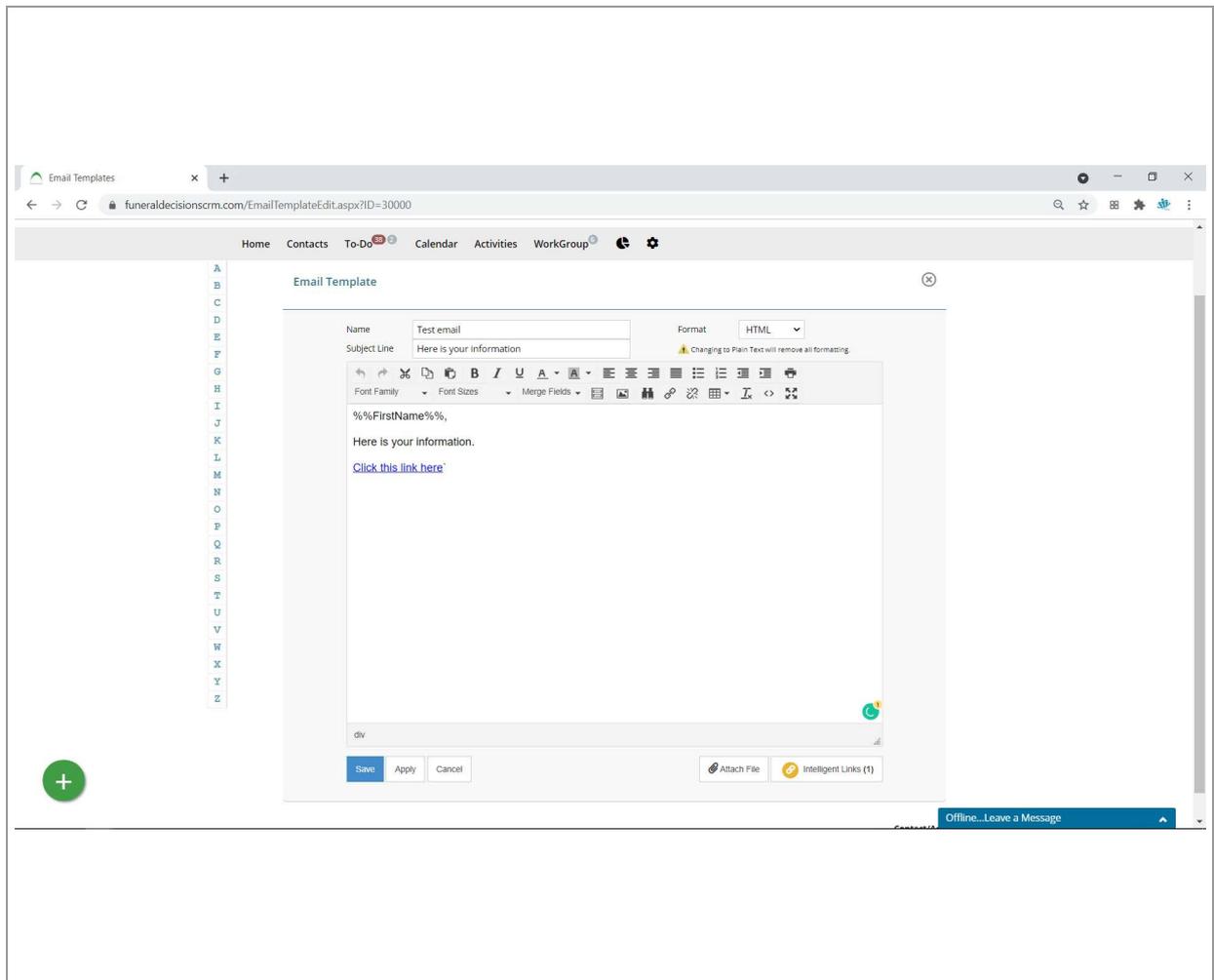
Then click "Add Intelligent Link"



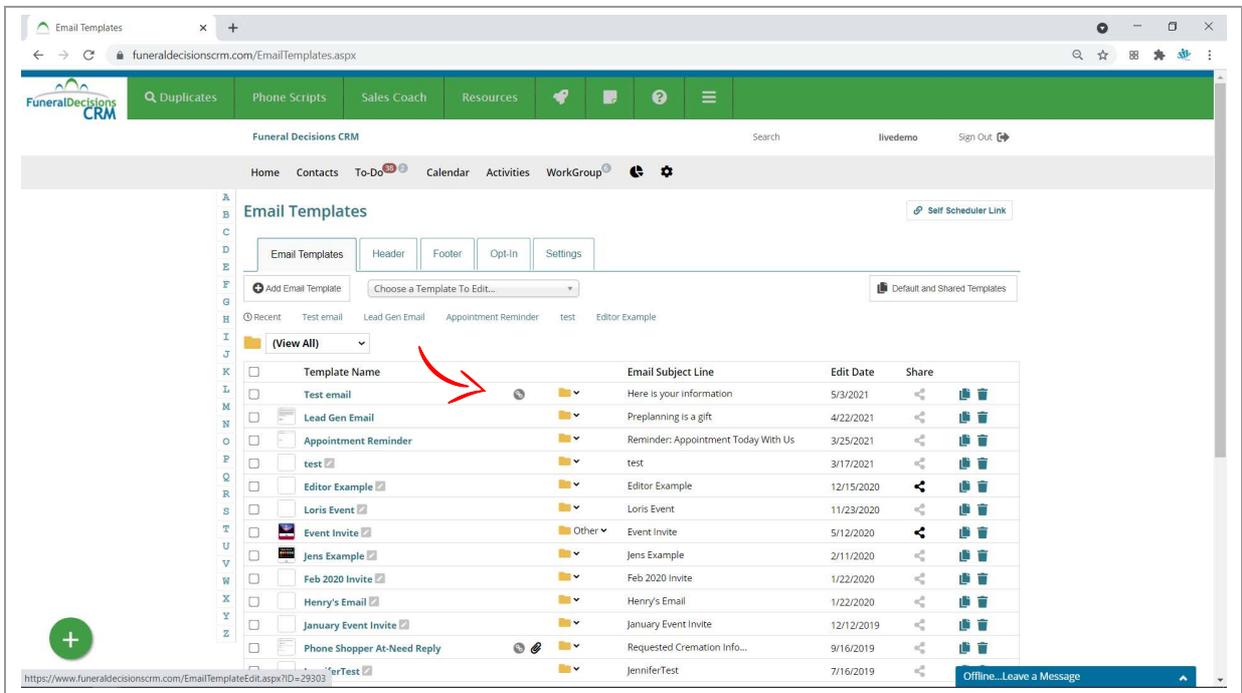
1. Select the link in your email that you want to turn into your "Intelligent Link". In this case, it's the link to the GPL document.
2. Select the AutoFlow (see the section on AutoFlows for more information about this)
3. Click "Save"



You will now see your Intelligent link show up...you can also add another one (if you have more than one link in your email) or clear them. Otherwise click "Close"



You will now see the number of Intelligent Links applied to this template. Click "Save".



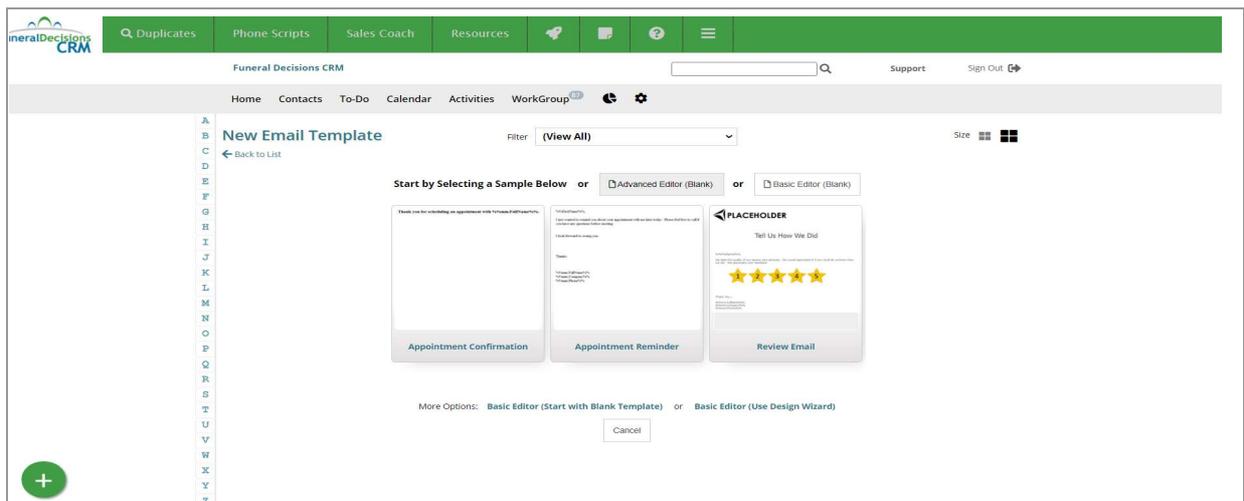
You will now see a 'link' icon in the template library next to any template that has Intelligent Links.

## Using Advanced Email Template Builder

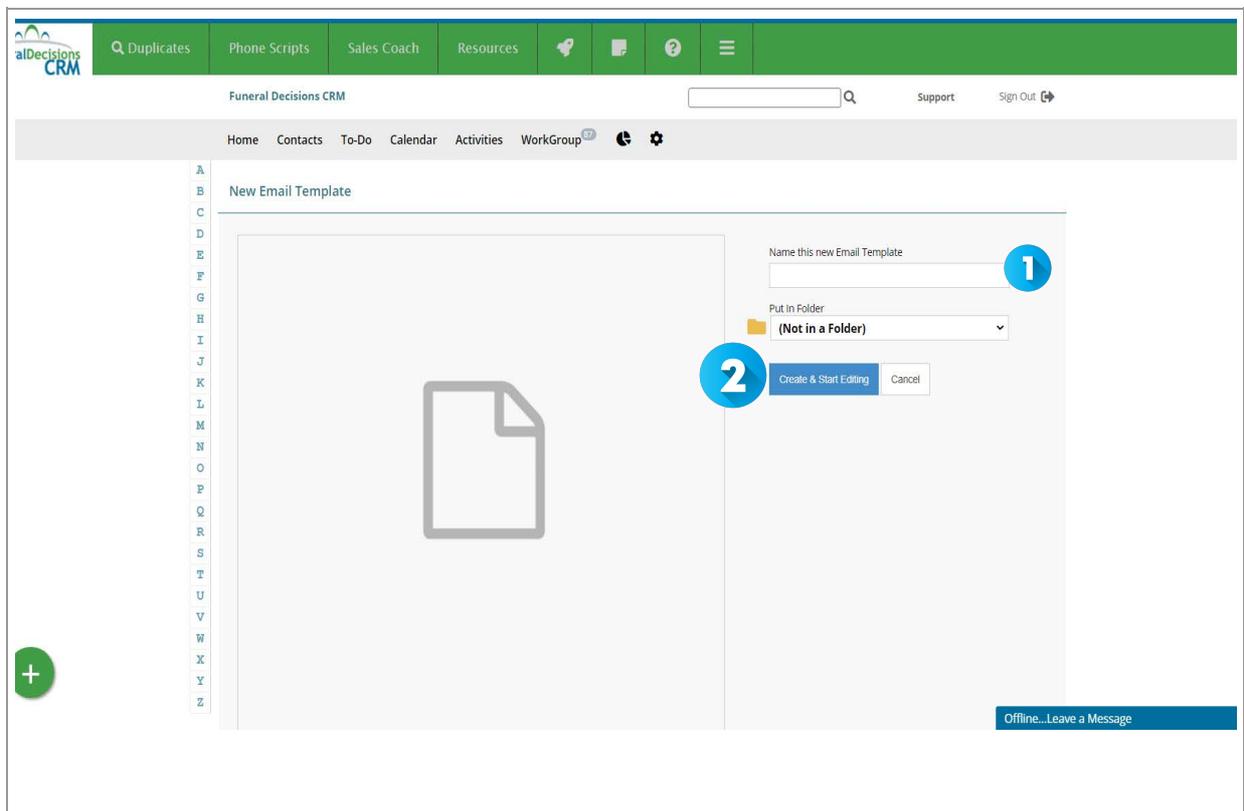
*FuneralDecisionsCRM*

The Advanced Email Editor is here to help you create professional looking HTML-based newsletters and other emails. You get there the same way you do for a Basic template, but Select Advanced Template

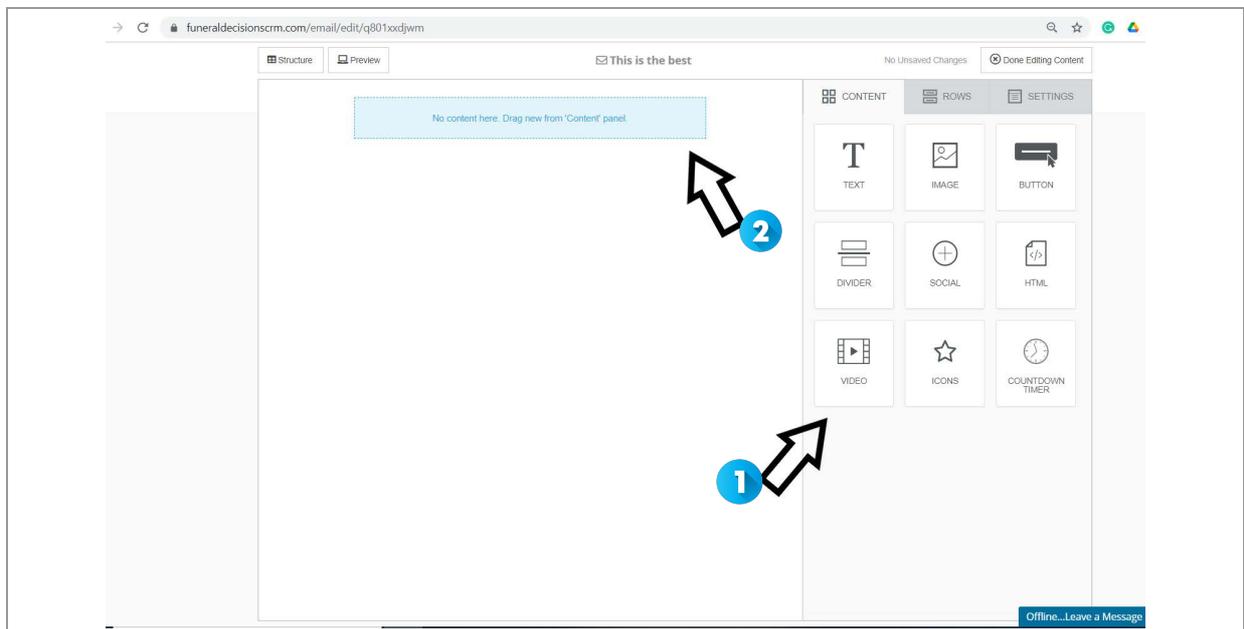
## Start an Advance Email



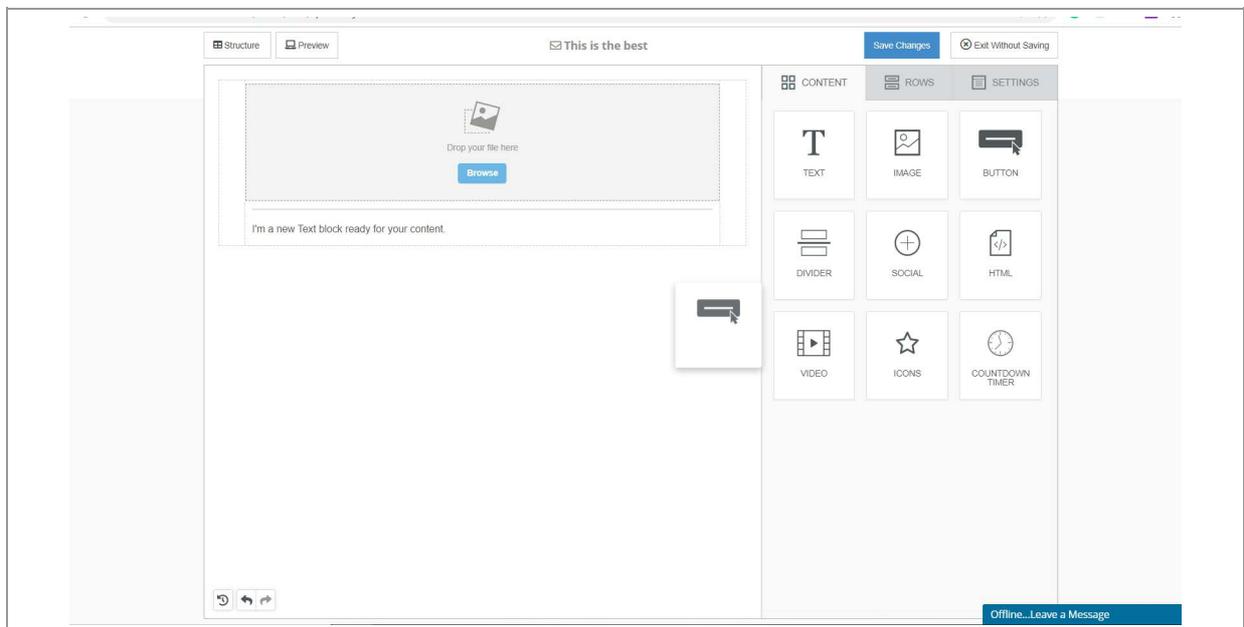
Select Advanced Letter Library



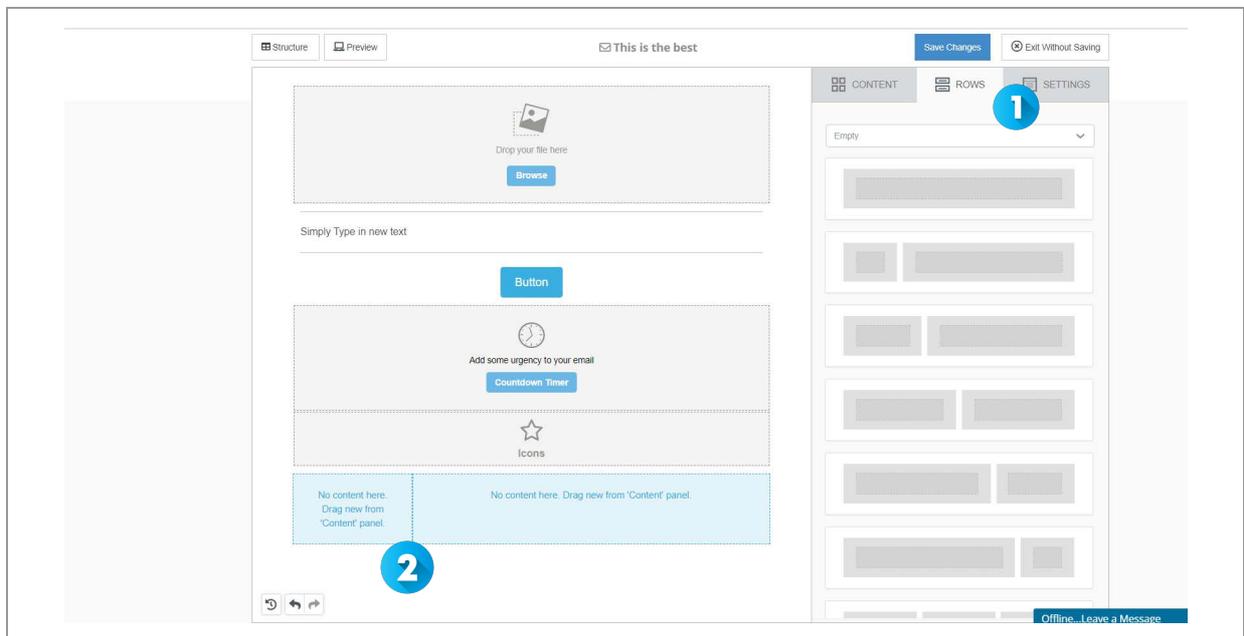
1. Name you email template and select the Folder that you want it added into.
2. Click Create & Start Editing



1. Drag the different parts from the Content Panel
2. Onto the email section of the Email template

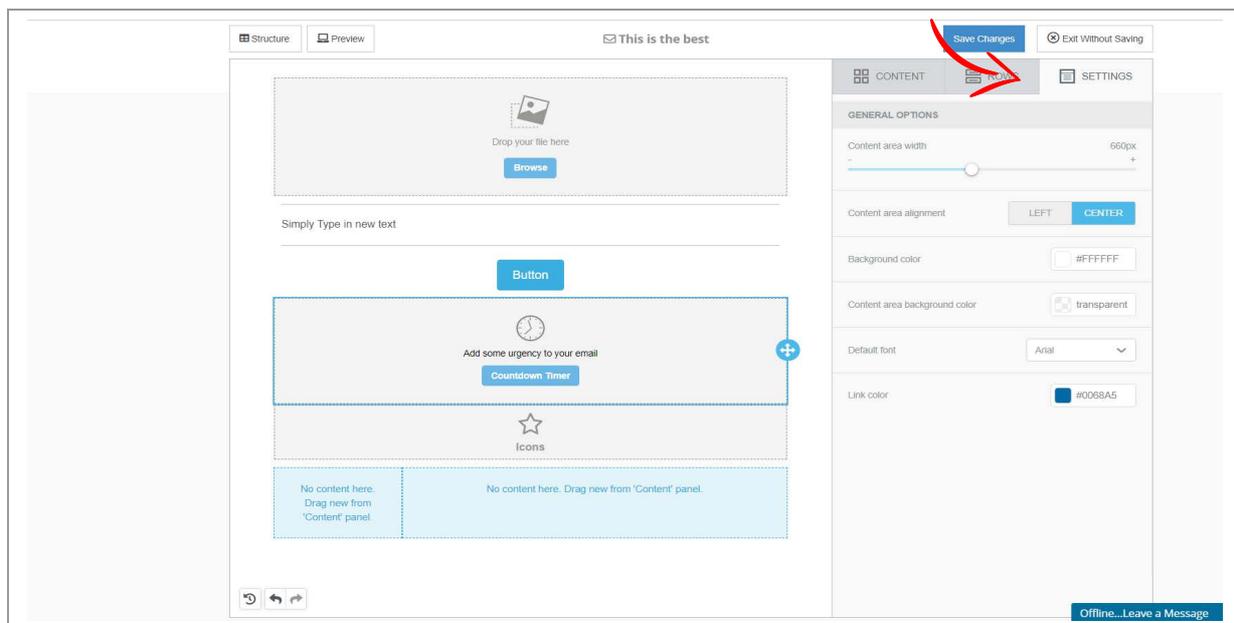


Drag and drop multiple elements into the email editor and re-arrange as needed.

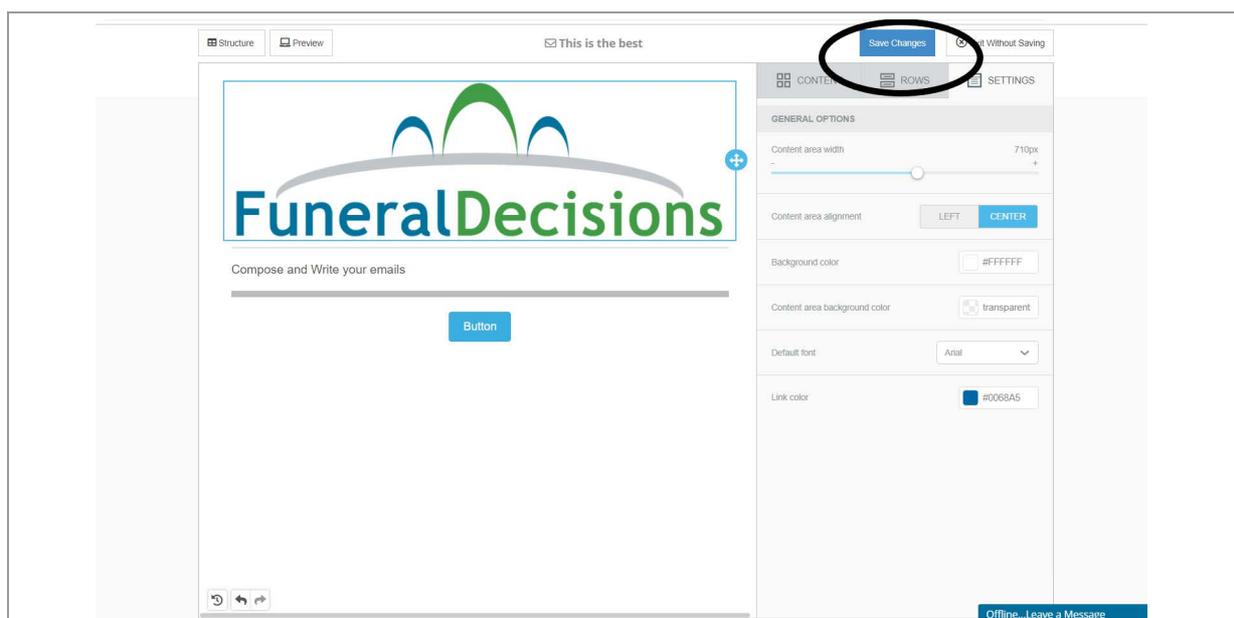


Once elements are added you need to go into and the different sections and edit them.

1. You can drag different rows and sections
2. Once you Drag it over it will Divide the sections into different style rows.

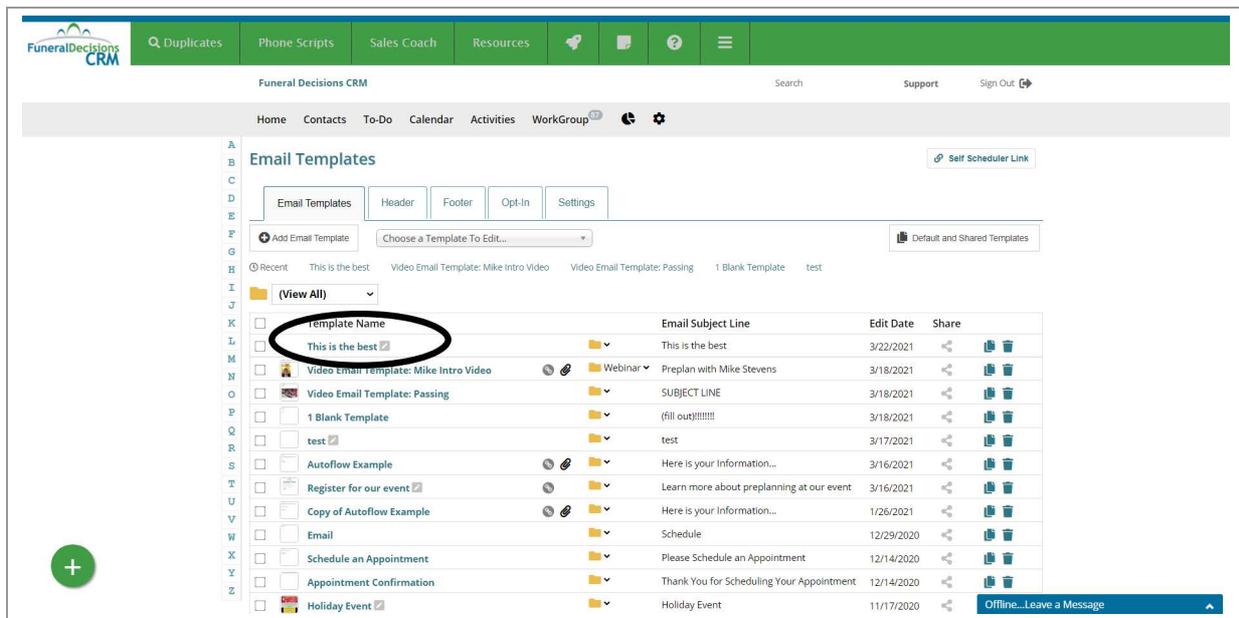


This can change the general setting of the email such as the size background color, fonts and link colors.

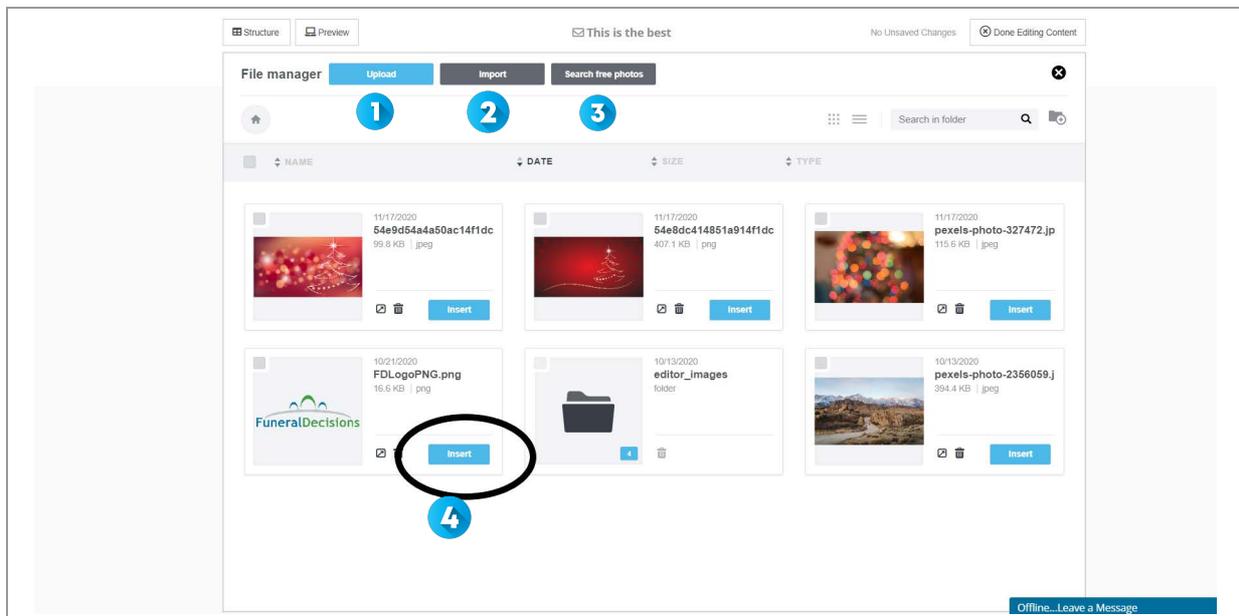


After all of the different edits always make sure to save the changes

# Automatically adds to templates

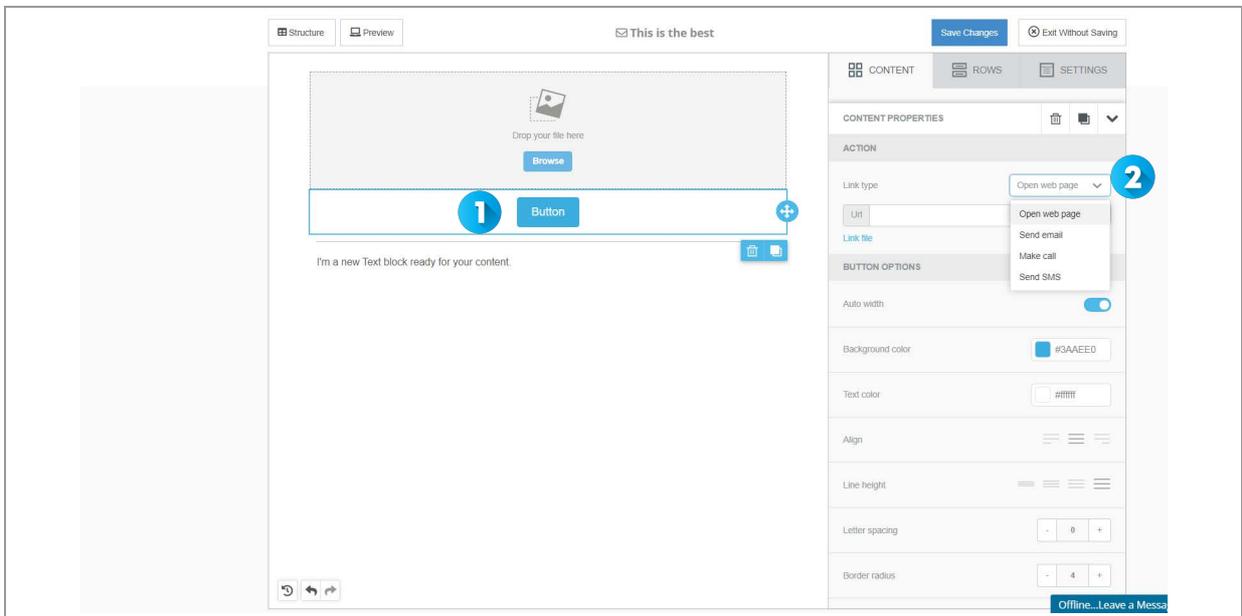


The Template is already to use.

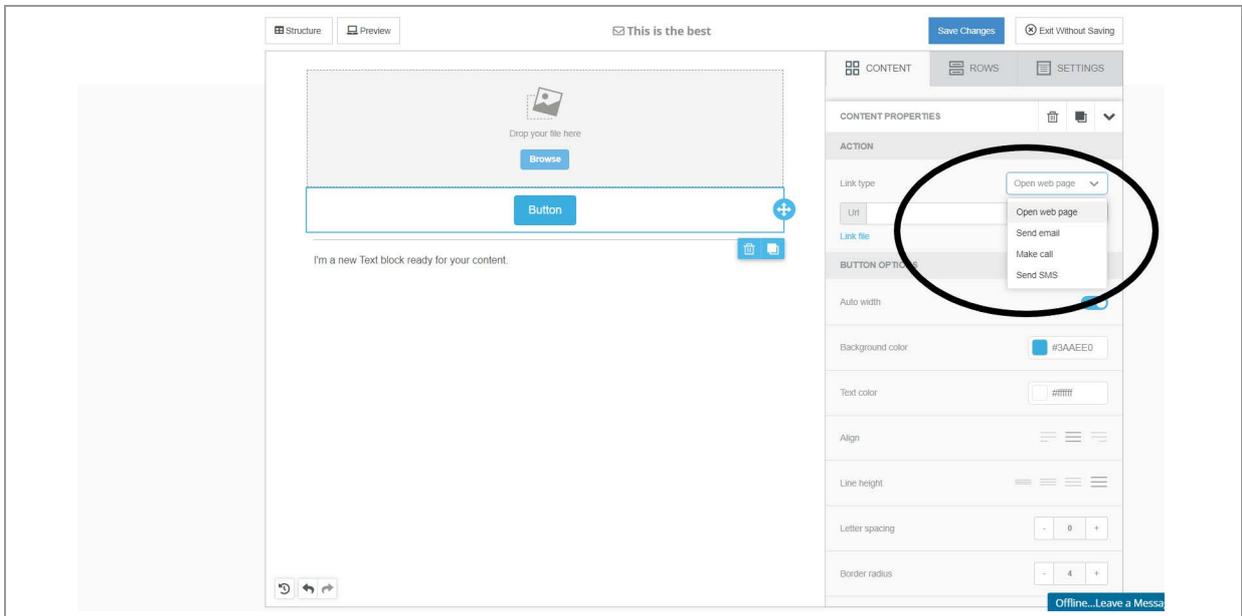


## Adding A Photo

1. Upload a file Picture from you Computer
2. Import a picture from Social media or the Internet
3. Get a photo from our a free database our photos
4. Insert the photo into the photo section of the email template



- Edit what the button does by
1. Selecting the button area
  2. Selecting the drop down

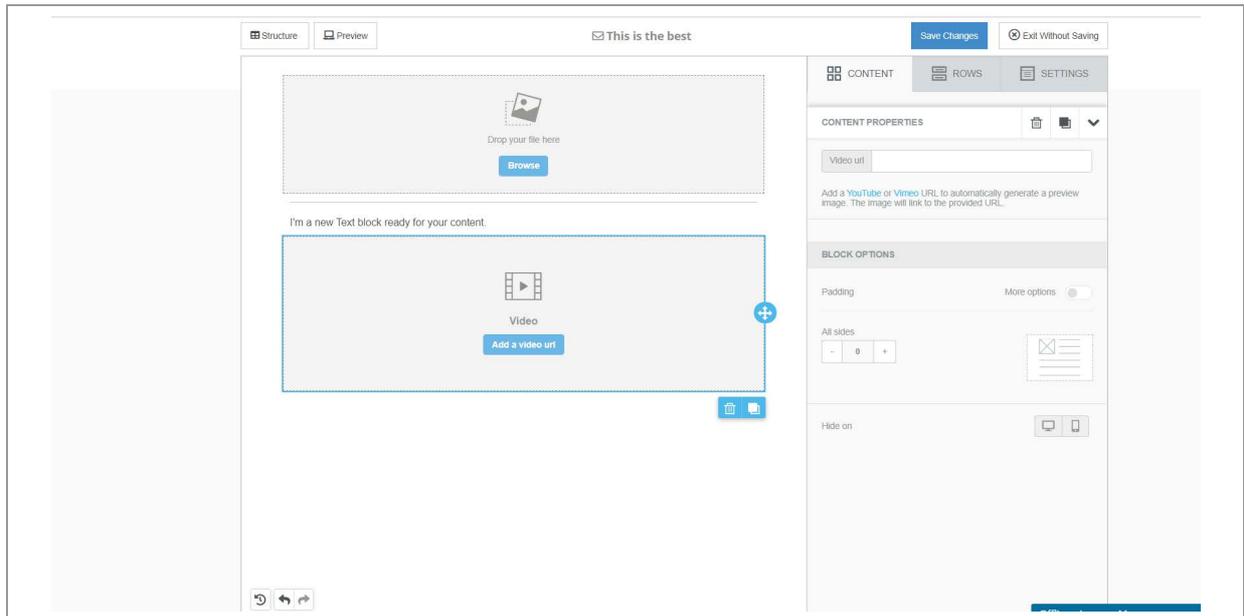


The button function can do several things:

1. Open a web page
2. Send an email to a specific address
3. Make a phone call
4. Send a text message

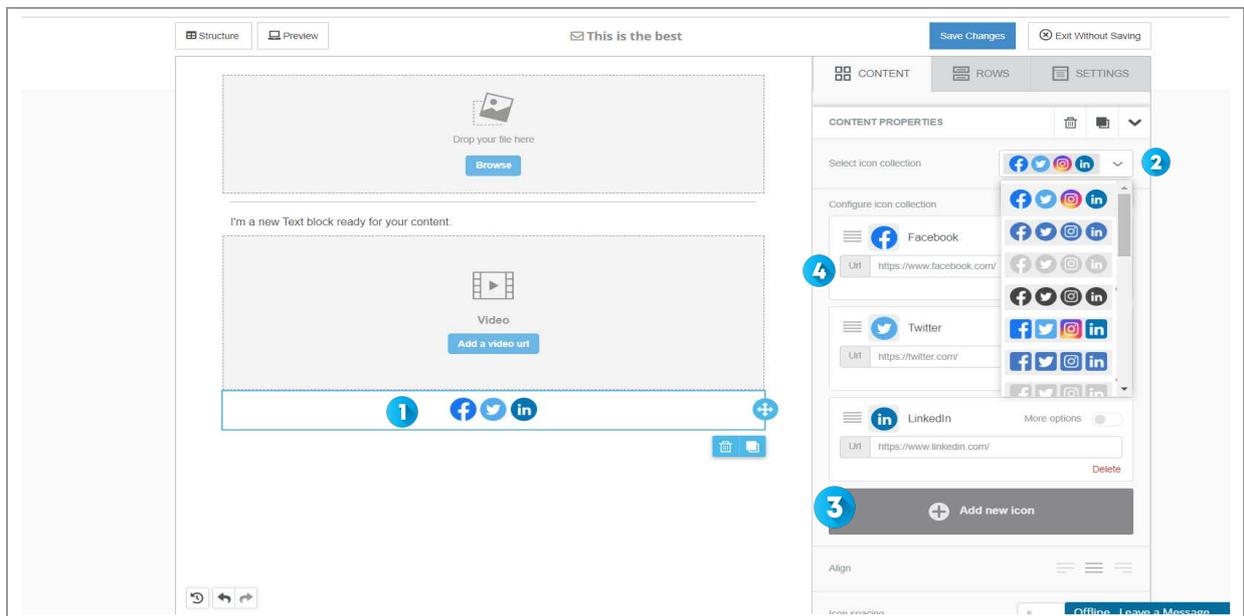
Click in the box that appears, and press 'Ctrl' and 'V' on your keyboard to paste the code.

Click the "Ok" button.



## Videos in your email

1. To add a video once the section has been added click the add a video url button
2. Copy and paste the video link or type in it and then click save changes



## Adding Social Media Buttons

1. The Social Media Buttons display here.
2. Choose the different colors or styles of buttons
3. Add or remove different icons
4. Enter the links you want added on your email

# Self-Scheduler

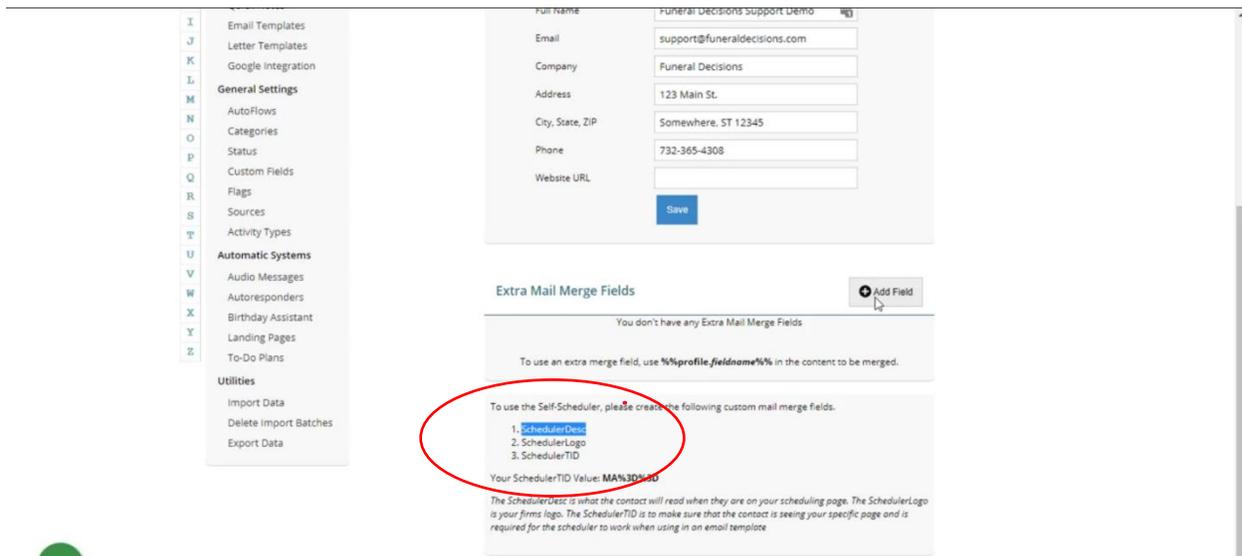
The Self-Scheduler allows you to send out a link to your families so they can schedule an appointment on their own time but add it right on to your calendar.

The screenshot shows a web interface for scheduling a 60-minute appointment. At the top, it says "Schedule a 60 minute Appointment" and "Your Name: Michael Regina". Below this is a calendar for December 2020 with the 14th selected. To the right, there is a "DATE" field showing "12/14/2020" and a list of "AVAILABLE TIMES" including 9:00a - 10:00a, 9:30a - 10:30a, 10:00a - 11:00a, 10:30a - 11:30a, 11:00a - 12:00p, 11:30a - 12:30p, 12:00p - 1:00p, 12:30p - 1:30p, 1:00p - 2:00p, 1:30p - 2:30p, 2:00p - 3:00p, 2:30p - 3:30p, 3:00p - 4:00p, 3:30p - 4:30p, 4:00p - 5:00p, and 4:30p - 5:30p. At the bottom, there is an "APPOINTMENT NOTE (OPTIONAL)" text area and a "+ ADD APPOINTMENT" button.

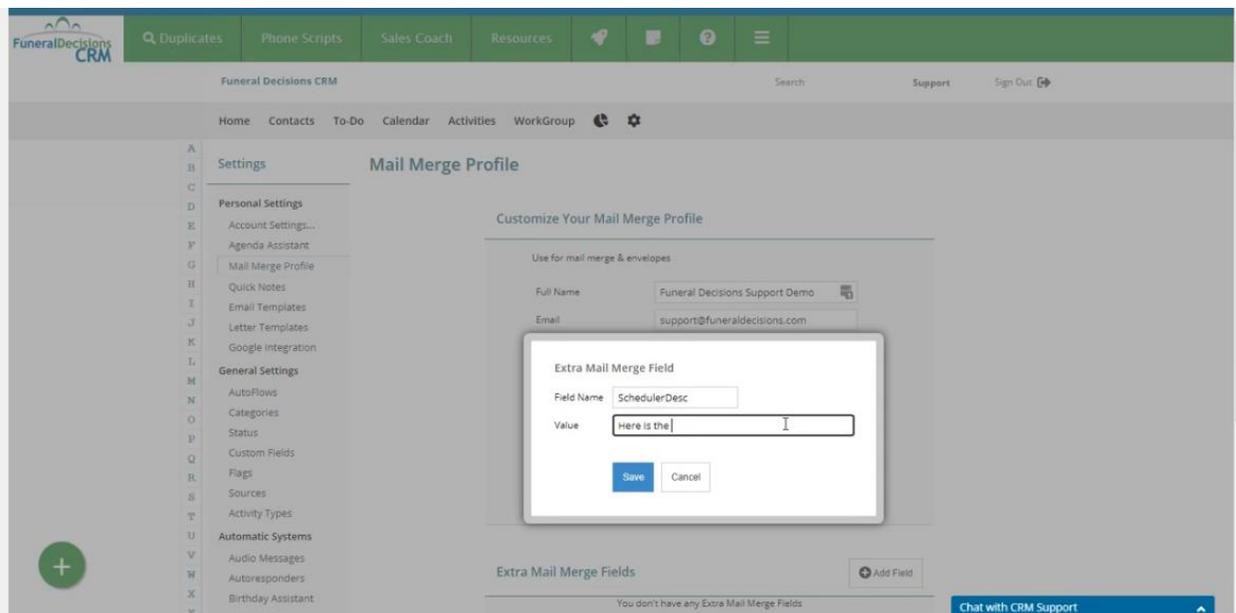
Here are the steps needed to make it work

Start by clicking the setting button

Next click the Mail Merge Profile Button and scrolly to the bottom of the screen



You Then are going to these 3 fields: Start by Clicking Add Field



1. Add the Field name as it shows in the Extra Mail Merge Fields start with "SchedulerDesc"
  1. Now add what you want the Calendar to say.
  2. Click Save

Letter Templates  
Google Integration

**General Settings**  
AutoFlows  
Categories  
Status  
Custom Fields  
Flags  
Sources  
Activity Types

**Automatic Systems**  
Audio Messages  
Autoresponders  
Birthday Assistant  
Landing Pages  
To-Do Plans

**Utilities**  
Import Data  
Delete Import Batches  
Export Data

Email: support@funeraldecisions.com  
Company: Funeral Decisions  
Address: 123 Main St.  
City, State, ZIP: Somewhere, ST 12345  
Phone: 732-365-4308  
Website URL:

**Save**

**Extra Mail Merge Fields** ➕ Add Field

| Field         | Value                              |
|---------------|------------------------------------|
| SchedulerDesc | Here is the scheduler description. |

To use an extra merge field, use `%profile.fieldname%` in the content to be merged.

To use the Self-Scheduler, please create the following custom mail merge fields.

- SchedulerDesc
- SchedulerLogo
- SchedulerTID

Your SchedulerTID Value: `MA%3D%3D`

*The SchedulerDesc is what the contact will read when they are on your scheduling page. The SchedulerLogo is your firms logo. The SchedulerTID is to make sure that the contact is seeing your specific page and is required for the scheduler to work when using in an email template*

Contact/Activity ID: Chat with CRM Support

Repeat for Field 2. Click add Field

FuneralDecisions CRM

Funeral Decisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

**Settings** **Mail Merge Profile**

**Personal Settings**  
Account Settings...  
Agenda Assistant  
Mail Merge Profile

**General Settings**  
AutoFlows  
Categories  
Status  
Custom Fields  
Flags  
Sources  
Activity Types

**Automatic Systems**  
Audio Messages  
Autoresponders  
Birthday Assistant

Customize Your Mail Merge Profile

Use for mail merge & envelopes

Full Name: Funeral Decisions Support Demo  
Email: support@funeraldecisions.com

**Extra Mail Merge Field**

Field Name: SchedulerLogo  
Value: N6c\_0HwKuzRap4LhQJzn5Z0y4eYAjw&usqp=CAU

**Save** **Cancel**

**Extra Mail Merge Fields** ➕ Add Field

| Field | Value |
|-------|-------|
|-------|-------|

Contact/Activity ID: Chat with CRM Support

1. Add "SchedulerLogo" as the field name Then for the Value this is a picture that has to have a URL (you can get this from right clicking on a logo on your website most of the time) Then Click Save

The 3<sup>rd</sup> field is very much the same except all of the information is already there for you. Click add field

Add the 3<sup>rd</sup> Field which is SchedulerTID for the field name but the Value is the code highlighted in the picture below.

## Extra Mail Merge Fields

+ Add Field

You don't have any Extra Mail Merge Fields

To use an extra merge field, use **%%profile.fieldname%%** in the content to be merged.

To use the Self-Scheduler, please create the following custom mail merge fields.

1. SchedulerDesc
2. SchedulerLogo
3. SchedulerTID

Your SchedulerTID Value: **MA%3D%3D**

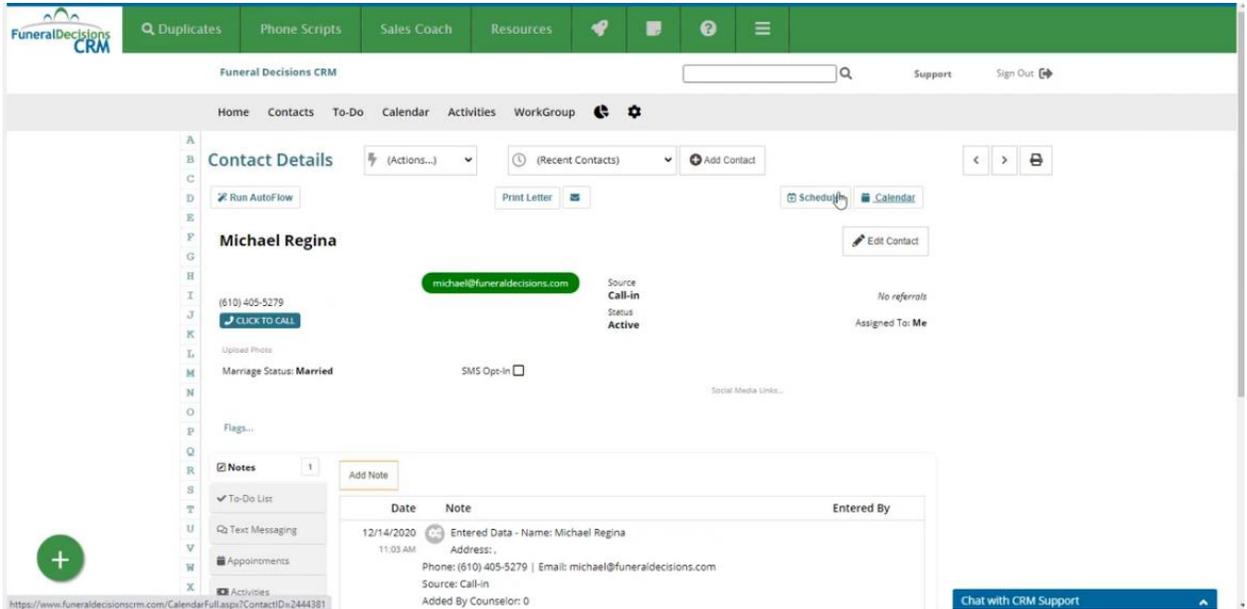
*The SchedulerDesc is what the contact will read when they are on your scheduling page. The SchedulerLogo is your firms logo. The SchedulerTID is to make sure that the contact is seeing your specific page and is required for the scheduler to work when using in an email template*

Offline.

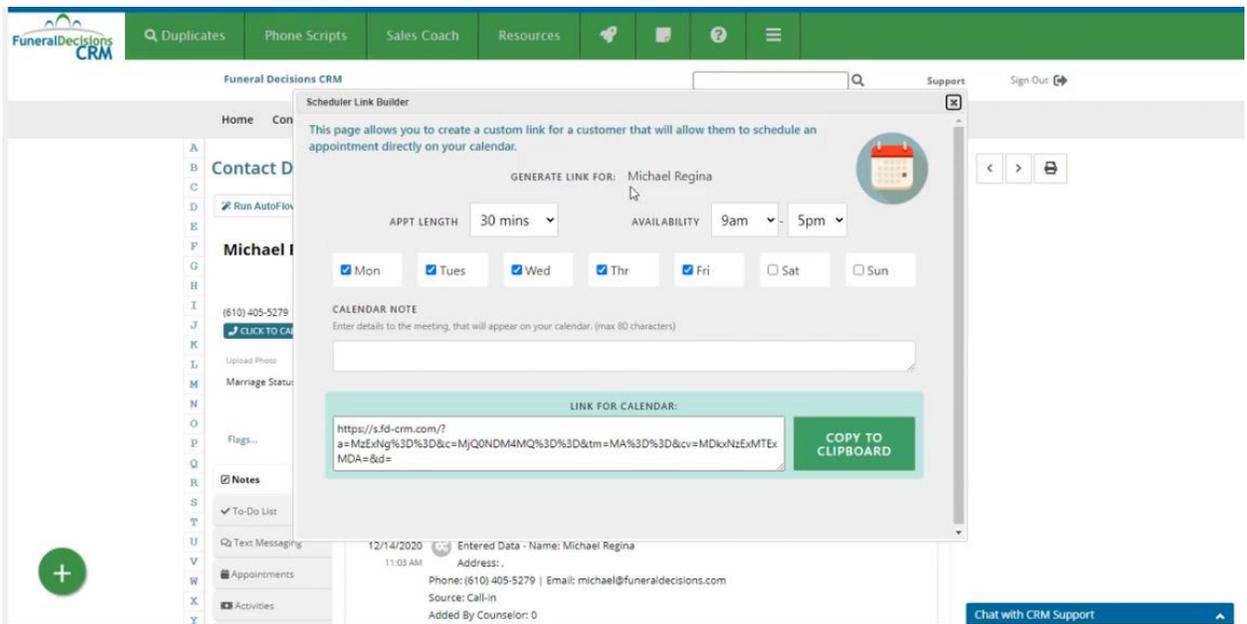
After this Field is saved you can now use the scheduler Link.

# Using the Scheduler Link

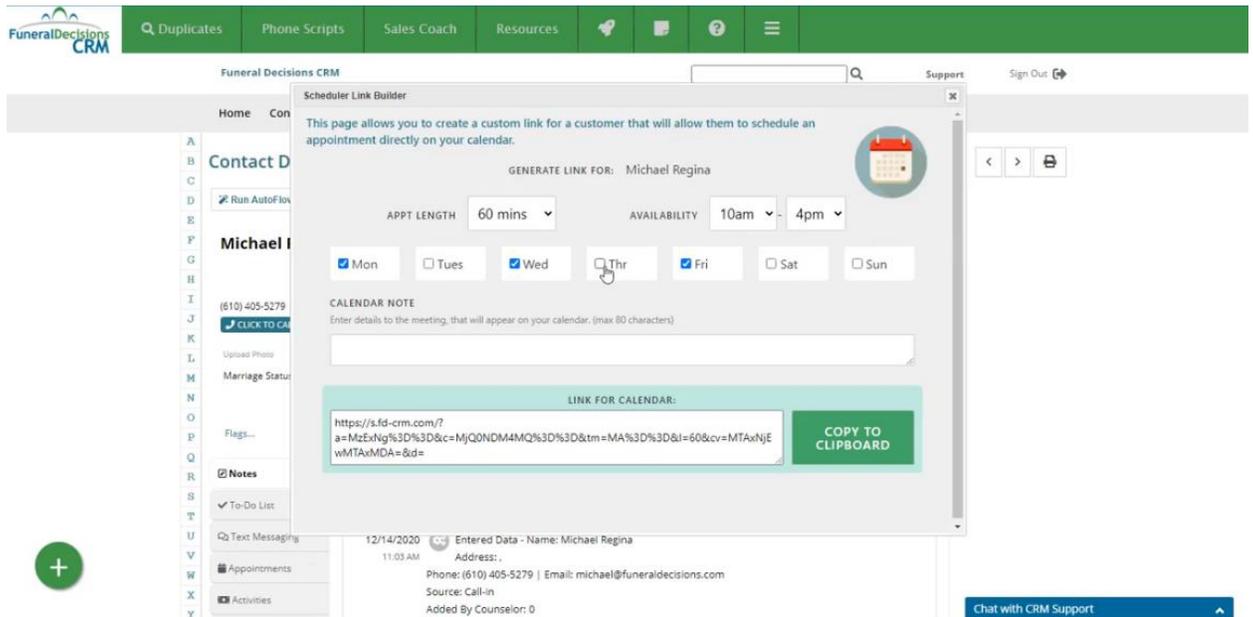
This is How you will use the Link for have clients self-schedule now that it is all set up.



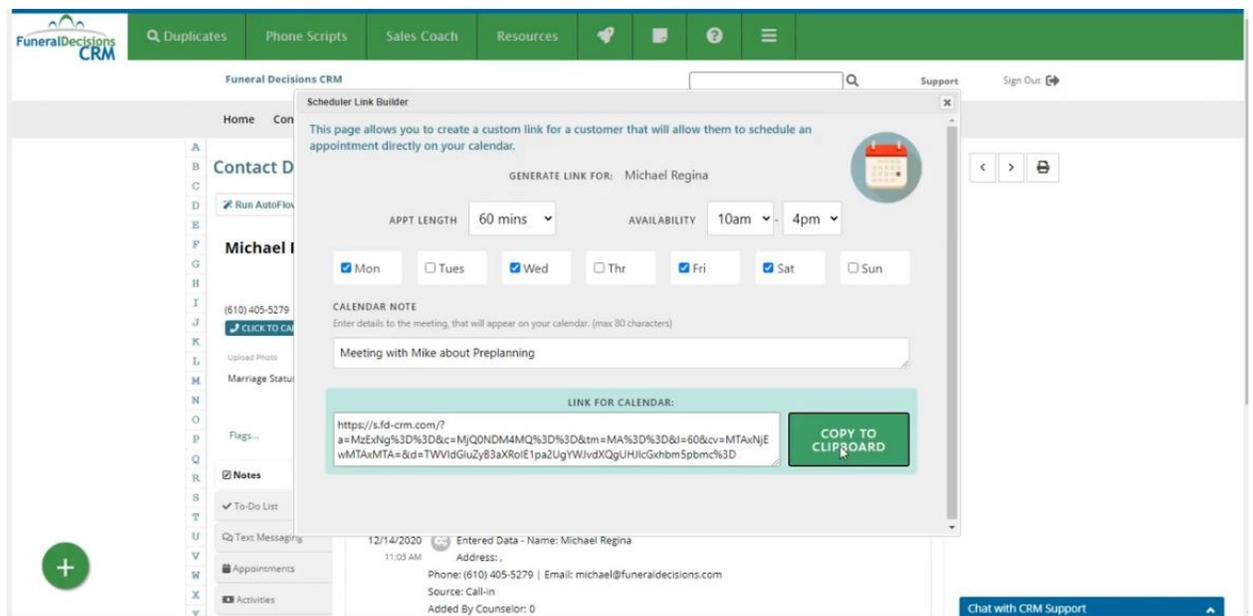
Click on the Scheduler Link From the Contact screen



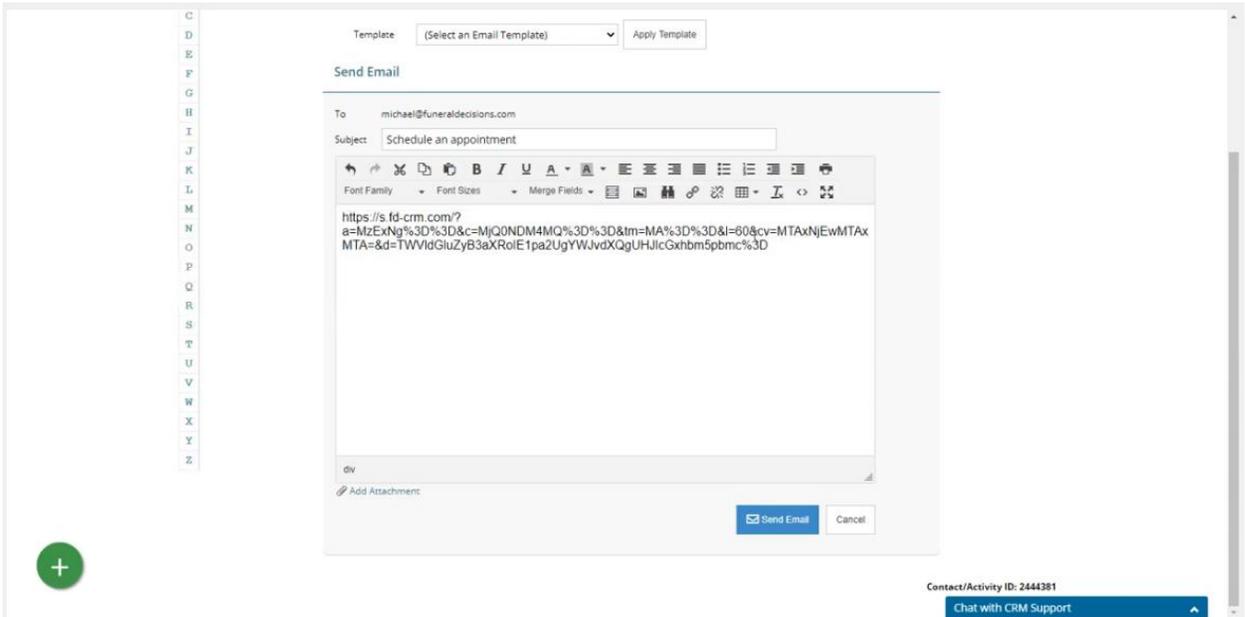
The box will pop up where you want to enter in all of your information



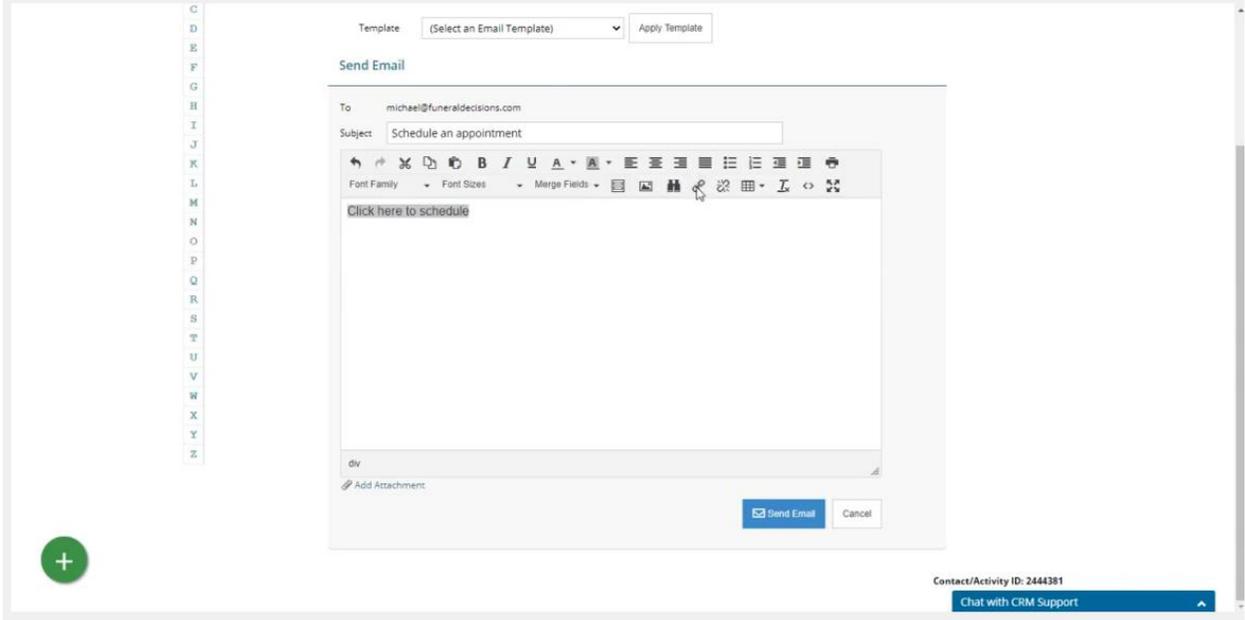
1. Fill out how long you want the appointment to be
2. Select you Availability by hour and days of the week
3. Add a note on what you want the Appointment to be about



You then are going to copy the link by clicking copy to clipboard.



You can then open up an email template and paste and create a link from there. ( See the email templates section to do this.)



You change the ugly link into a nice looking click here to schedule by using the link button on the email template.



## Schedule a 30 minute Appointment

Schedule an Appointment with Me

Your Name: Charles Bruton

| March 2021 |     |     |     |     |     |     |
|------------|-----|-----|-----|-----|-----|-----|
| MON        | TUE | WED | THU | FRI | SAT | SUN |
| 1          | 2   | 3   | 4   | 5   | 6   | 7   |
| 8          | 9   | 10  | 11  | 12  | 13  | 14  |
| 15         | 16  | 17  | 18  | 19  | 20  | 21  |
| 22         | 23  | 24  | 25  | 26  | 27  | 28  |
| 29         | 30  | 31  | 1   | 2   | 3   | 4   |
| 5          | 6   | 7   | 8   | 9   | 10  | 11  |

DATE (M/D/YYYY)

3/24/2021

AVAILABLE TIMES

- 10:00a - 10:30a
- 10:30a - 11:00a
- 11:00a - 11:30a
- 11:30a - 12:00p
- 12:00p - 12:30p
- 12:30p - 1:00p
- 1:00p - 1:30p
- 1:30p - 2:00p
- 2:00p - 2:30p
- 2:30p - 3:00p
- 3:00p - 3:30p
- 3:30p - 4:00p

APPOINTMENT NOTE (OPTIONAL)

+ ADD APPOINTMENT

You Then get a nice calendar that you can send out to families to Self Schedule themselves

# Use the Self Scheduler in an bulk email templates

The screenshot shows the FuneralDecisions CRM interface. The top navigation bar includes 'Duplicates', 'Phone Scripts', 'Sales Coach', and 'Resources'. The main menu has 'Home', 'Contacts', 'To-Do', 'Calendar', 'Activities', and 'WorkGroup'. The 'Email Templates' section is active, showing a list of templates with columns for 'Template Name', 'Email Subject Line', 'Edit Date', and 'Share'. A 'Self Scheduler Link' button is located in the top right corner of the template list area.

| Template Name        | Email Subject Line                  | Edit Date  | Share |
|----------------------|-------------------------------------|------------|-------|
| Appointment Reminder | Reminder: Appointment Today With Us | 3/22/2021  |       |
| Editor Example       | Editor Example                      | 12/15/2020 |       |
| Event Invite         | Event Invite                        | 5/12/2020  |       |
| Example Email        | Example Email                       | 2/5/2019   |       |
| Facebook Reply       | Facebook Reply                      | 12/18/2018 |       |
| Feb 2020 Invite      | Feb 2020 Invite                     | 1/22/2020  |       |
| Henry's Email        | Henry's Email                       | 1/22/2020  |       |
| Holiday Newsletter   | Holiday Newsletter                  | 11/20/2018 |       |
| Hospice Newsletter   | Hospice Newsletter                  | 4/17/2019  |       |
| Initial Response 1   | Funeral Services Information        |            |       |

You simply go to you email templates and click the Self Scheduler Link

The screenshot shows the 'Email Links' dialog box in the FuneralDecisions CRM. The dialog is titled 'Email Links' and contains the following information:

- GENERATE LINK FOR: MAIL MERGE
- APPT LENGTH: 30 mins
- AVAILABILITY: 9am - 5pm
- Days: Mon, Tues, Wed, Thr, Fri (checked); Sat, Sun (unchecked)
- CALENDAR NOTE: Enter details to the meeting, that will appear on your calendar. (max 80 characters)
- LINK FOR CALENDAR: `https://s.fd-crm.com/?e=%email%&tm=%profile.SchedulerTID%&a=Mj100Q%3D%3D&cv=MDxNzExMTExMDA=&d=`
- A 'COPY TO CLIPBOARD' button is located next to the link.

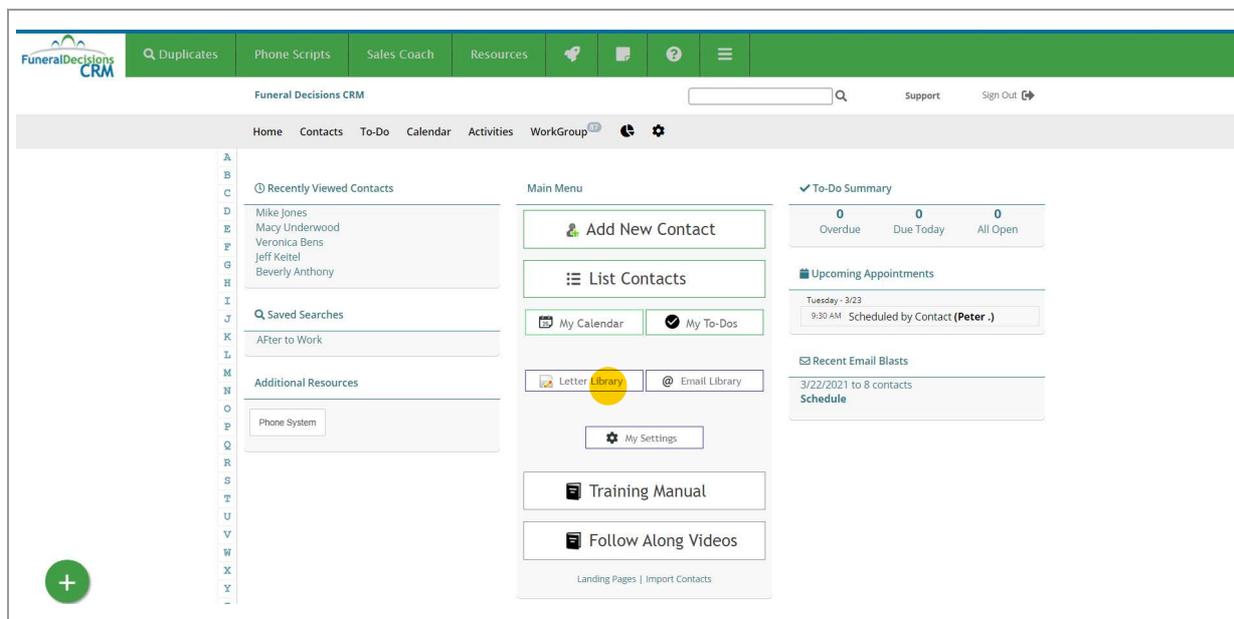
You then copy and paste the link in from the clipboard into an email template like shown before.

Letters

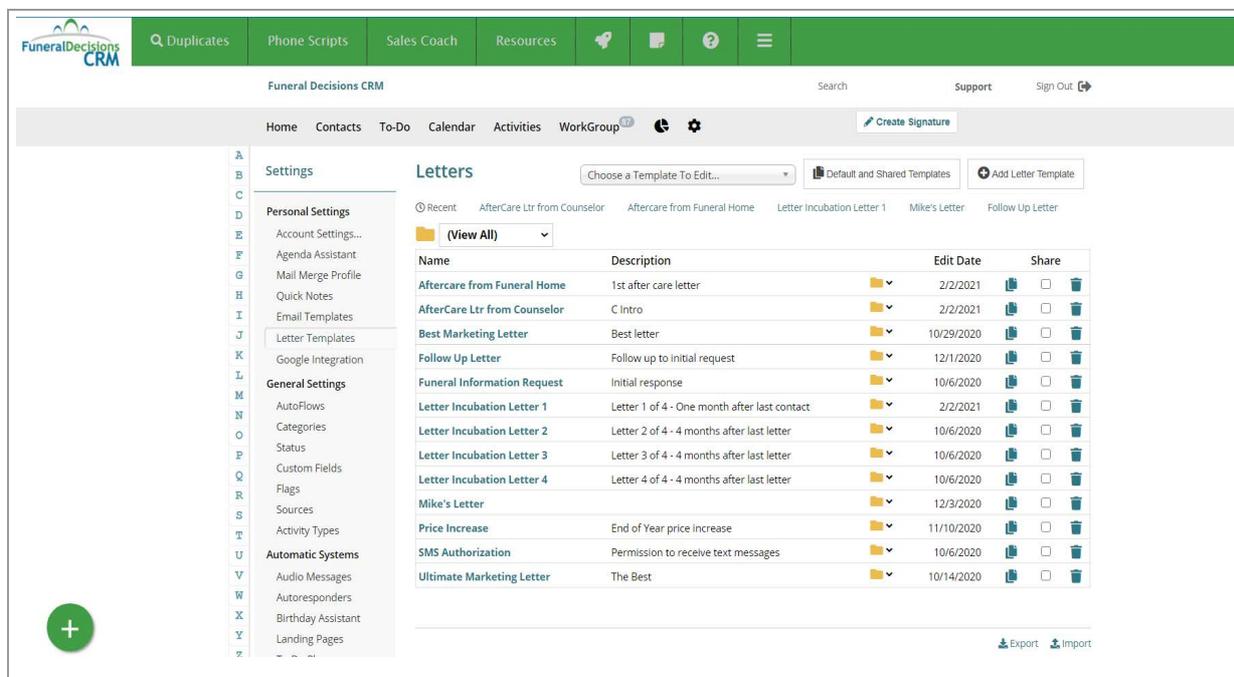
# Creating A Letter Template (From Scratch/Word Doc)

FuneralDecisionsCRM

Create a letter template to send to one or multiple contacts. It can be one you sit down and write from scratch or one you copy and paste in from another file.



Click on "Settings"



Then click "Letter Templates"

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

Settings

Letters

Choose a Template To Edit... Default and Shared Templates Add Letter Template

| Name                         | Description                                  | Edit Date  | Share |
|------------------------------|--|------------|-------|
| Aftercare from Funeral Home  | 1st after care letter                        | 2/2/2021   |       |
| AfterCare Ltr from Counselor | C Intro                                      | 2/2/2021   |       |
| Best Marketing Letter        | Best letter                                  | 10/29/2020 |       |
| Follow Up Letter             | Follow up to initial request                 | 12/1/2020  |       |
| Funeral Information Request  | Initial response                             | 10/6/2020  |       |
| Letter Incubation Letter 1   | Letter 1 of 4 - One month after last contact | 2/2/2021   |       |
| Letter Incubation Letter 2   | Letter 2 of 4 - 4 months after last letter   | 10/6/2020  |       |
| Letter Incubation Letter 3   | Letter 3 of 4 - 4 months after last letter   | 10/6/2020  |       |
| Letter Incubation Letter 4   | Letter 4 of 4 - 4 months after last letter   | 10/6/2020  |       |
| Mike's Letter                |  | 12/3/2020  |       |
| Price Increase               | End of Year price increase                   | 11/10/2020 |       |
| SMS Authorization            | Permission to receive text messages          | 10/6/2020  |       |
| Ultimate Marketing Letter    | The Best                                     | 10/14/2020 |       |

Click on " Add Letter Template "

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

Settings

Letter Template

Name Description

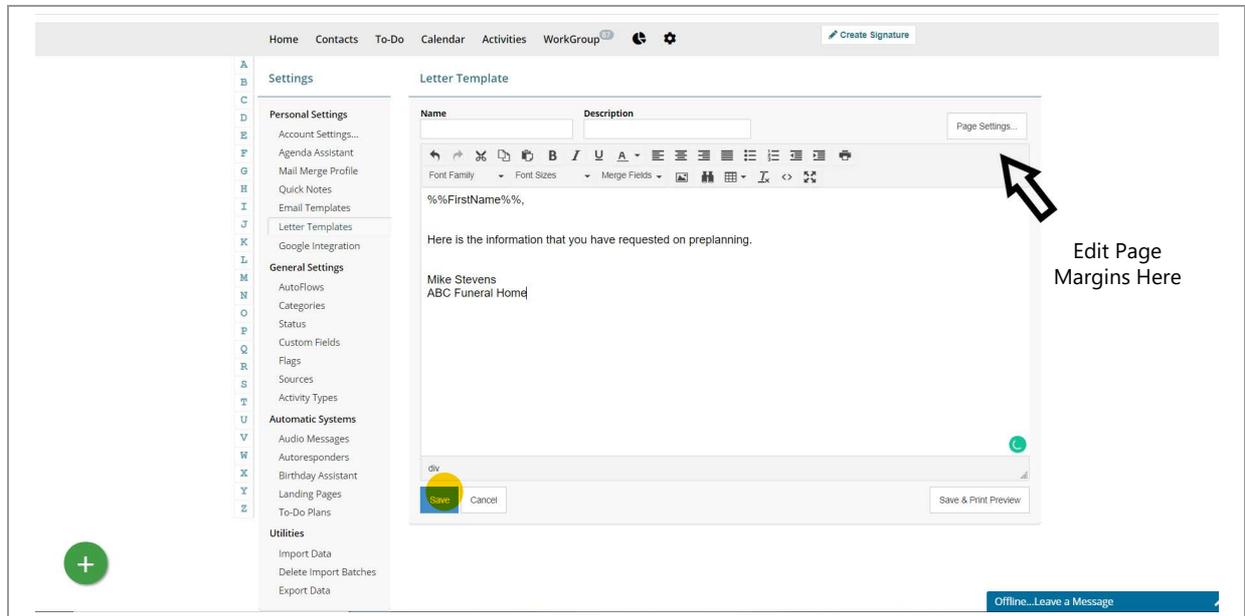
Font Family Font Sizes Merge Fields

Save Cancel Save & Print Preview

Enter the name of the template. This will not be seen by the consumer, it is only so you know what the template is.  
 OPTIONAL - Enter a description.

If you have an existing letter in Word or other file format, simply highlight everything and copy and paste it in the editor. If you are writing it from scratch, write it in the editor.

Unlike when sending an email to a single contact, you are unable to edit letter templates, so ALWAYS use Merge Fields when creating letters...regardless if its one written from scratch or one you copy and pasted in. Merge Fields enable information from the contact record (ie First Name, Last Name, etc) to be pulled when printing the letter. For example when sending a letter to 1 or 200 people, you would not want to go in and edit two hundred letters by hand. By using the Merge Fields option, the template will automatically pull out and add the name(s) to the template of the individual or the 200 people you are sending the letter to.



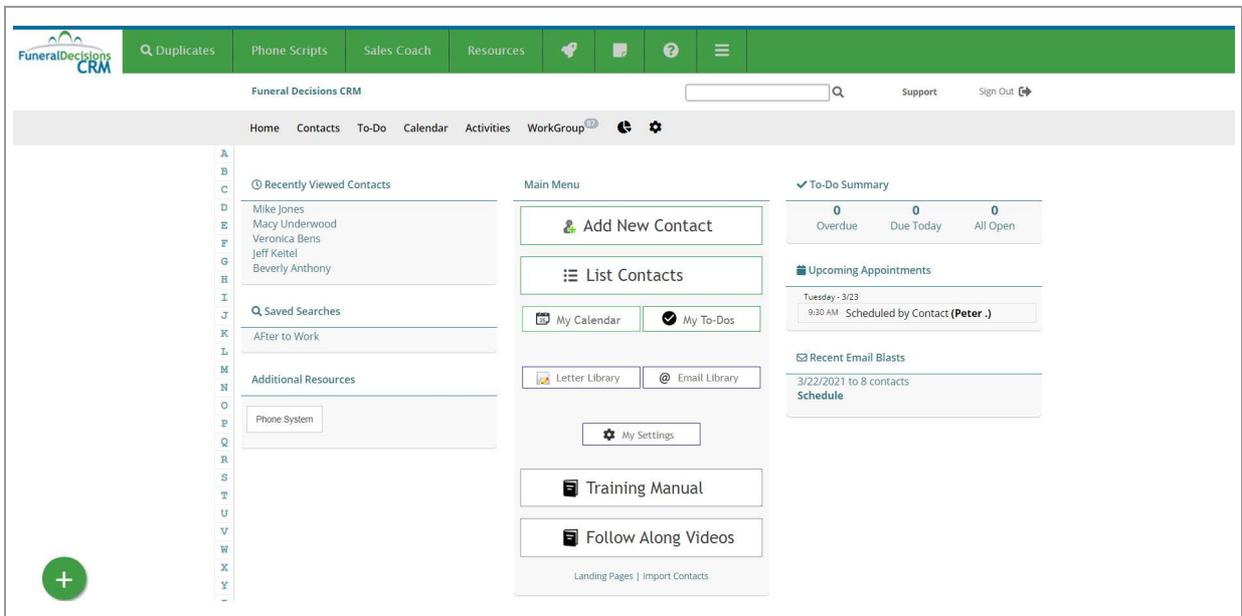
OPTIONAL - If you have preprinted stationery that you're using, you may want to make the margins different than the standard default.

Click on "Save"

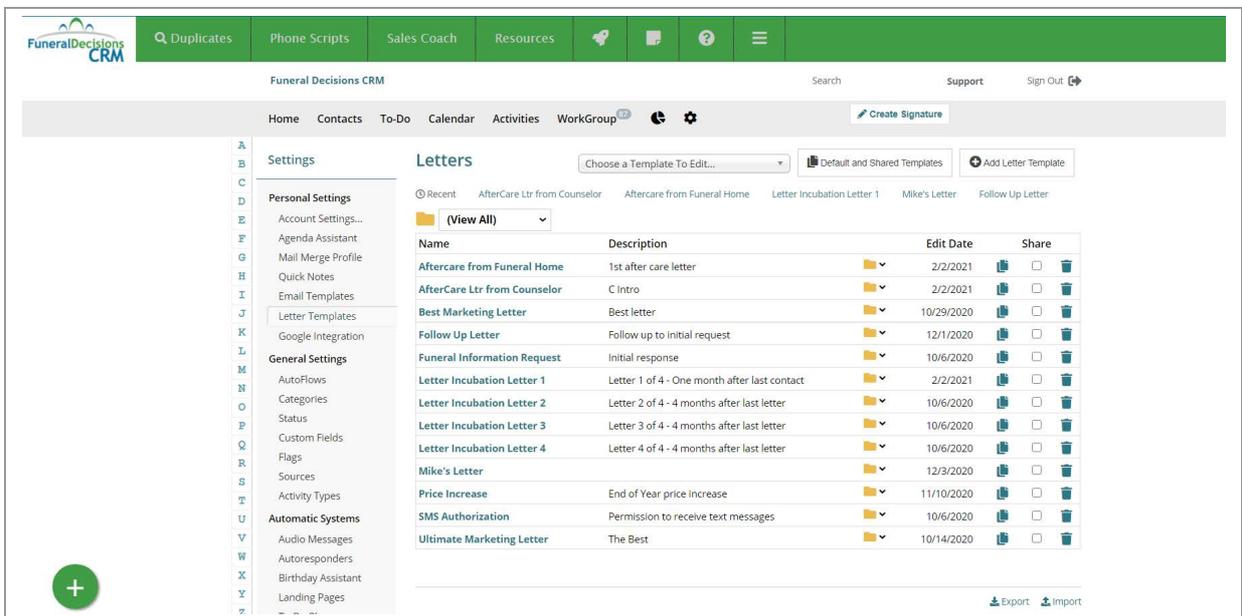
## Adding a Shared Template or a Default Template

*FuneralDecisionsCRM*

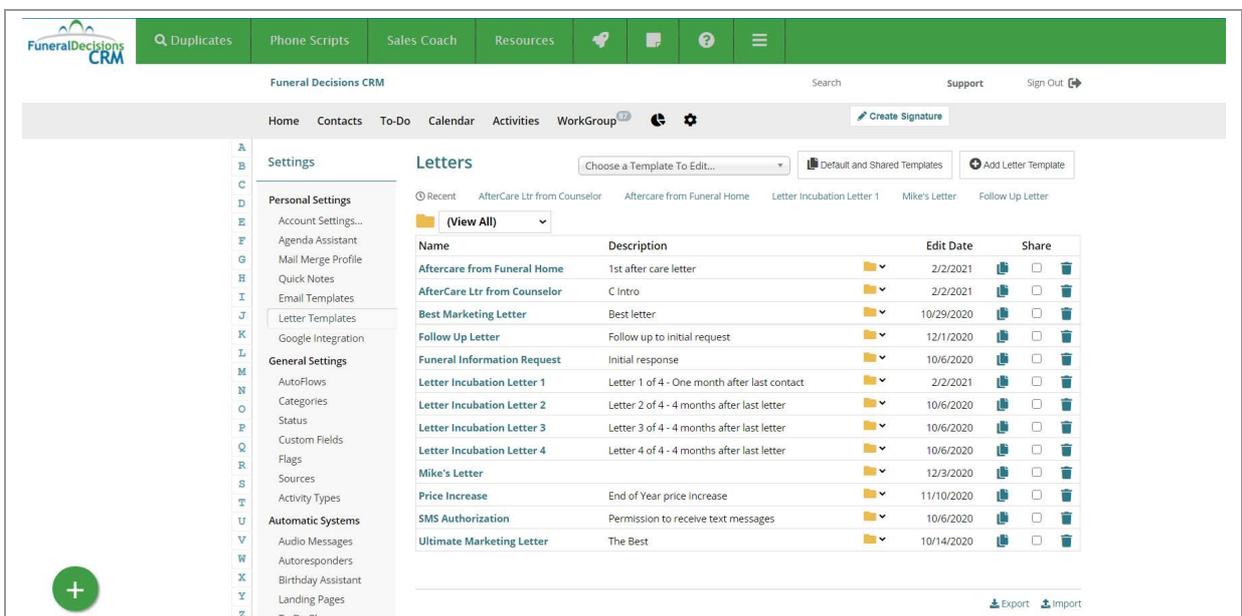
Download a template provided by your business or another user on your system.



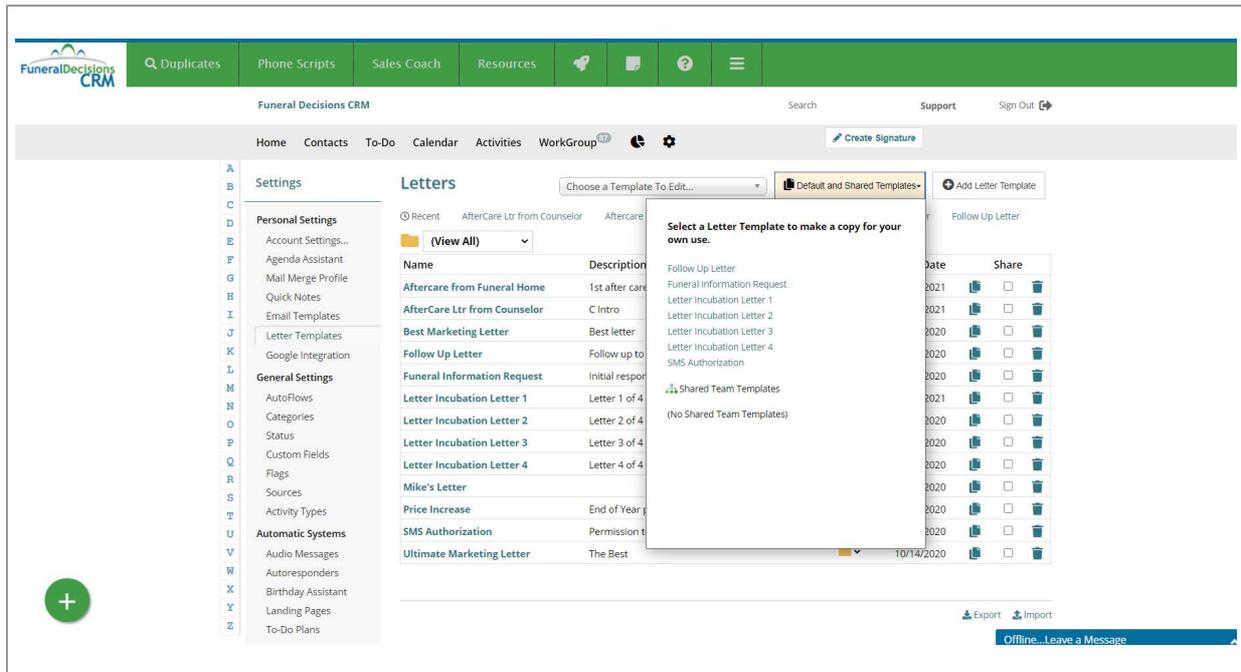
Click on "Customize the system just how you like it" edit in "Funeral Decisions CRM - Mozilla Firefox"



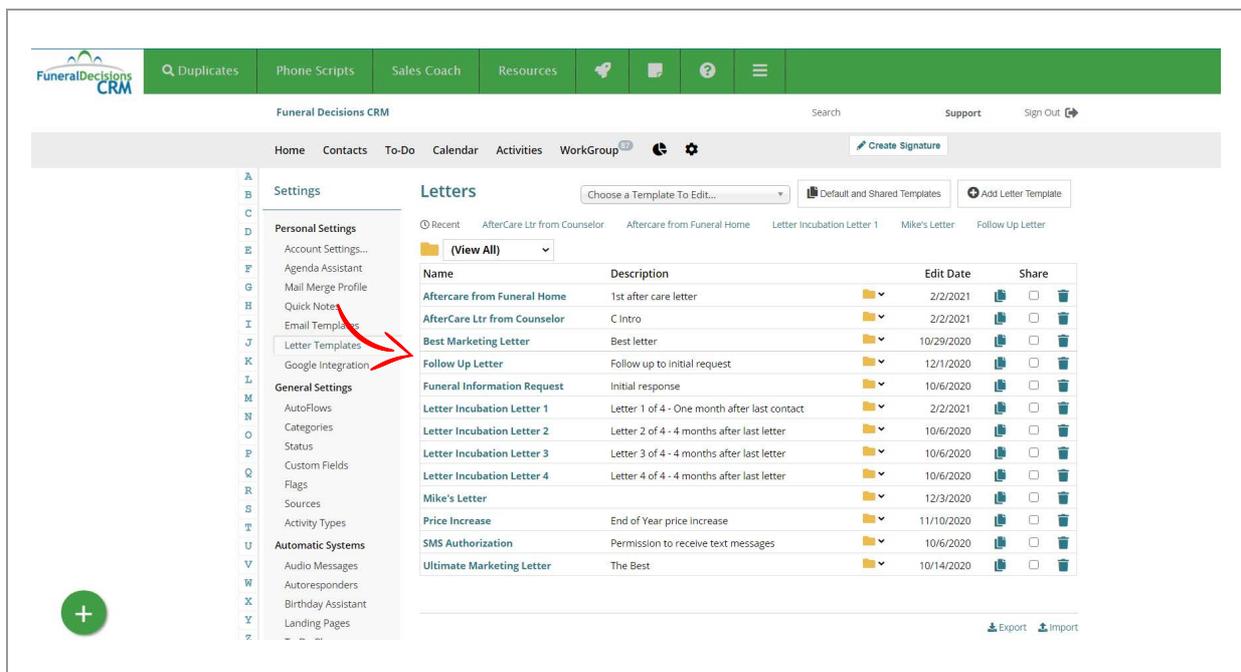
Click on "Letter Templates" edit in "Settings"



Click on " Default and Shared Templates" edit in "Letter Templates"



Click on the name of the template you wish to download into your library



The template is now added to your system and ready to use or edit.

## Edit An Existing Template

FuneralDecisionsCRM

Edit an existing letter template in your letter library.

Click on "Settings"

| Name                         | Description                                  | Edit Date  | Share                    |
|------------------------------|--|------------|--------------------------|
| Aftercare from Funeral Home  | 1st after care letter                        | 2/2/2021   | <input type="checkbox"/> |
| AfterCare Ltr from Counselor | C Intro                                      | 2/2/2021   | <input type="checkbox"/> |
| Best Marketing Letter        | Best letter                                  | 10/29/2020 | <input type="checkbox"/> |
| Follow Up Letter             | Follow up to initial request                 | 12/1/2020  | <input type="checkbox"/> |
| Funeral Information Request  | Initial response                             | 10/6/2020  | <input type="checkbox"/> |
| Letter Incubation Letter 1   | Letter 1 of 4 - One month after last contact | 2/2/2021   | <input type="checkbox"/> |
| Letter Incubation Letter 2   | Letter 2 of 4 - 4 months after last letter   | 10/6/2020  | <input type="checkbox"/> |
| Letter Incubation Letter 3   | Letter 3 of 4 - 4 months after last letter   | 10/6/2020  | <input type="checkbox"/> |
| Letter Incubation Letter 4   | Letter 4 of 4 - 4 months after last letter   | 10/6/2020  | <input type="checkbox"/> |
| Mike's Letter                |  | 12/3/2020  | <input type="checkbox"/> |
| Price Increase               | End of Year price increase                   | 11/10/2020 | <input type="checkbox"/> |
| SMS Authorization            | Permission to receive text messages          | 10/6/2020  | <input type="checkbox"/> |
| Ultimate Marketing Letter    | The Best                                     | 10/14/2020 | <input type="checkbox"/> |

Click on "Letter Templates"

FuneralDecisions CRM

Search Support Sign Out

Home Contacts To-Do Calendar Activities WorkGroup Create Signature

Settings

Personal Settings

- Account Settings...
- Agenda Assistant
- Mail Merge Profile
- Quick Notes
- Email Templates
- Letter Templates
- Google Integration

General Settings

- AutoFlows
- Categories
- Status
- Custom Fields
- Flags
- Sources
- Activity Types

Automatic Systems

- Audio Messages
- Autoresponders
- Birthday Assistant
- Landing Pages

Letters

Choose a Template To Edit... Default and Shared Templates Add Letter Template

Recent AfterCare Ltr from Counselor Aftercare from Funeral Home Letter Incubation Letter 1 Mike's Letter Follow Up Letter

| Name                         | Description                                  | Edit Date  | Share |
|------------------------------|--|------------|-------|
| Aftercare from Funeral Home  | 1st after care letter                        | 2/2/2021   |       |
| Aftercare Ltr from Counselor | C Intro                                      | 2/2/2021   |       |
| Best Marketing Letter        | Best letter                                  | 10/29/2020 |       |
| Follow Up Letter             | Follow up to initial request                 | 12/1/2020  |       |
| Funeral Information Request  | Initial response                             | 10/6/2020  |       |
| Letter Incubation Letter 1   | Letter 1 of 4 - One month after last contact | 2/2/2021   |       |
| Letter Incubation Letter 2   | Letter 2 of 4 - 4 months after last letter   | 10/6/2020  |       |
| Letter Incubation Letter 3   | Letter 3 of 4 - 4 months after last letter   | 10/6/2020  |       |
| Letter Incubation Letter 4   | Letter 4 of 4 - 4 months after last letter   | 10/6/2020  |       |
| Mike's Letter                |  | 12/3/2020  |       |
| Price Increase               | End of Year price increase                   | 11/10/2020 |       |
| SMS Authorization            | Permission to receive text messages          | 10/6/2020  |       |
| Ultimate Marketing Letter    | The Best                                     | 10/14/2020 |       |

Export Import

Click on the template you would like to edit

FuneralDecisions CRM

Search Support Sign Out

Home Contacts To-Do Calendar Activities WorkGroup Create Signature

Settings

Personal Settings

- Account Settings...
- Agenda Assistant
- Mail Merge Profile
- Quick Notes
- Email Templates
- Letter Templates
- Google Integration

General Settings

- AutoFlows
- Categories
- Status
- Custom Fields
- Flags
- Sources
- Activity Types

Automatic Systems

- Audio Messages
- Autoresponders
- Birthday Assistant
- Landing Pages
- To-Do Plans

Letter Template

Name: Follow Up Letter Description: Follow up to initial request Page Settings...

Font Family Font Sizes Merge Fields

Dear %%FirstName%%,  
We recently responded to your request for information  
Sincerely,  
Mike

1

2 Save Cancel

Save & Print Preview

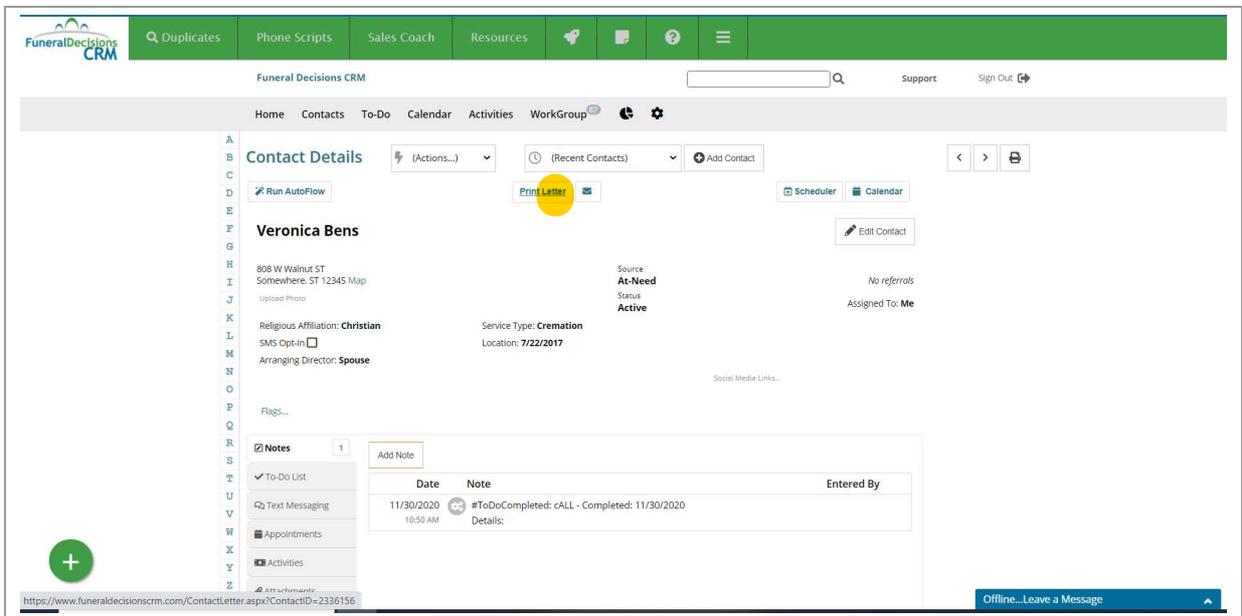
Offline... Leave a Message

1. Edit the template in the editor
2. Click on "Save"

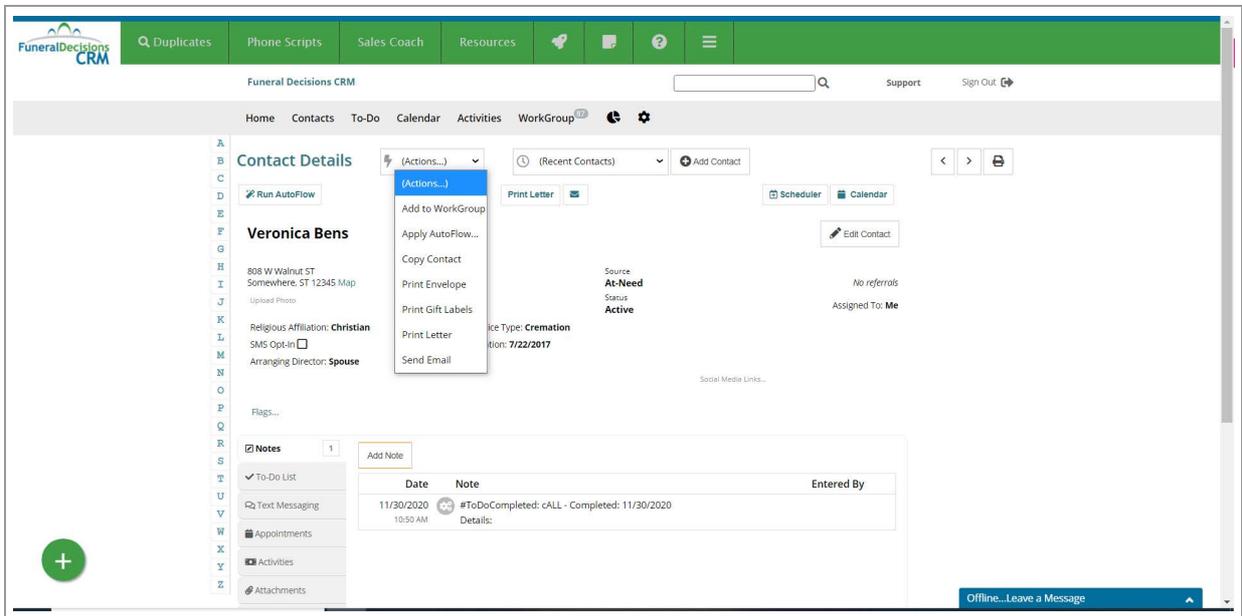
## Send A Letter To A Single Contact

FuneralDecisionsCRM

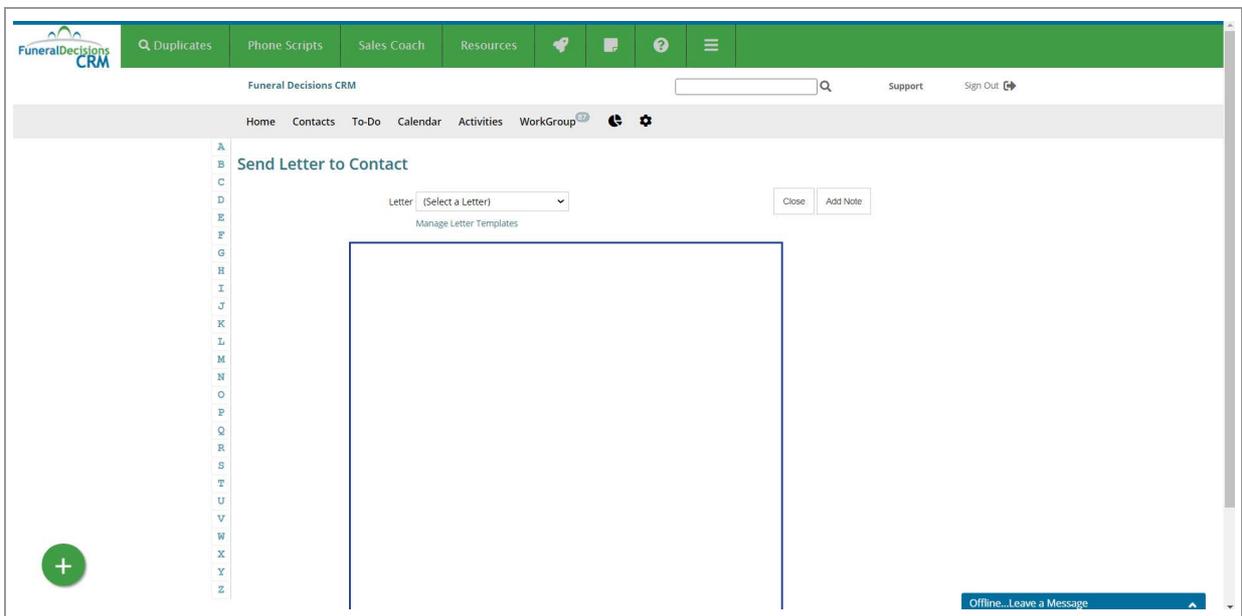
Print a letter to one person



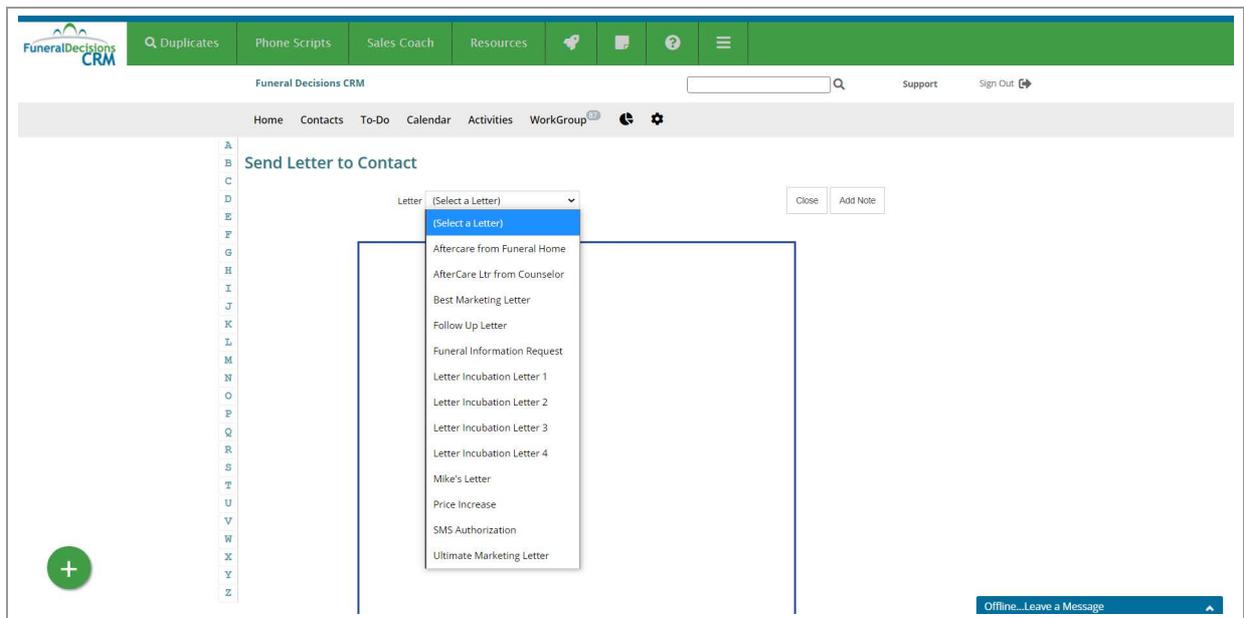
From the contact's record, click on the "Print Letter" button.



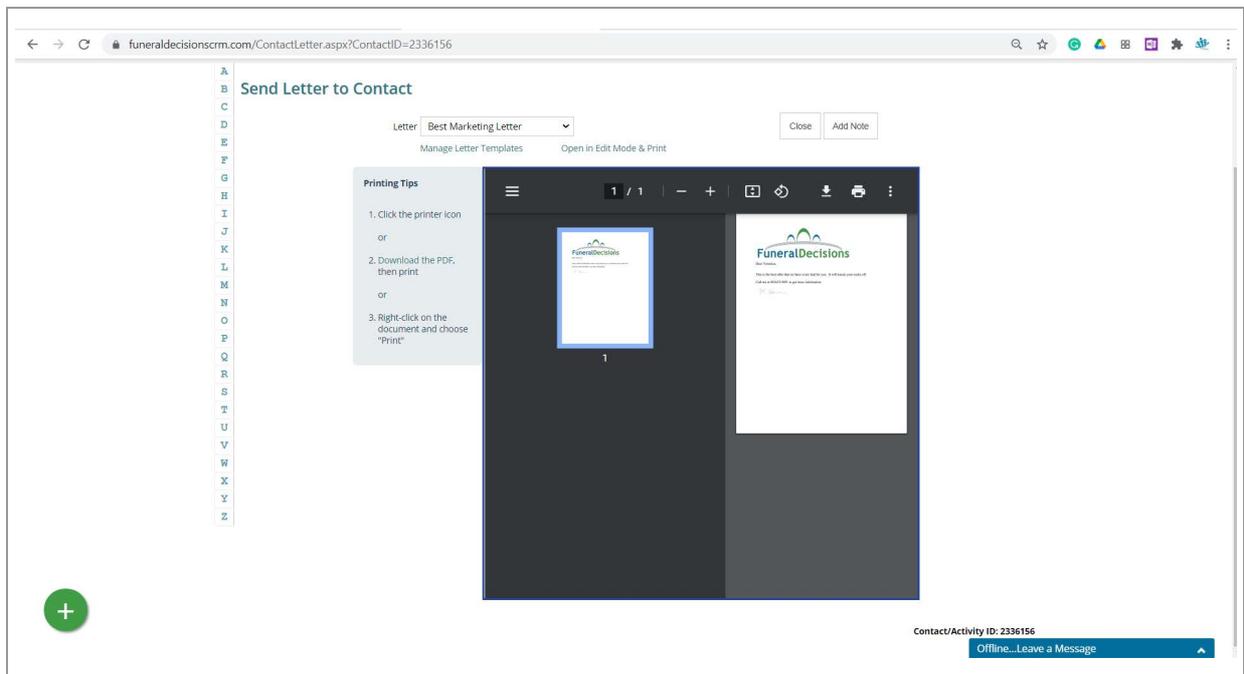
Or you can Select the "Print Letter" option.



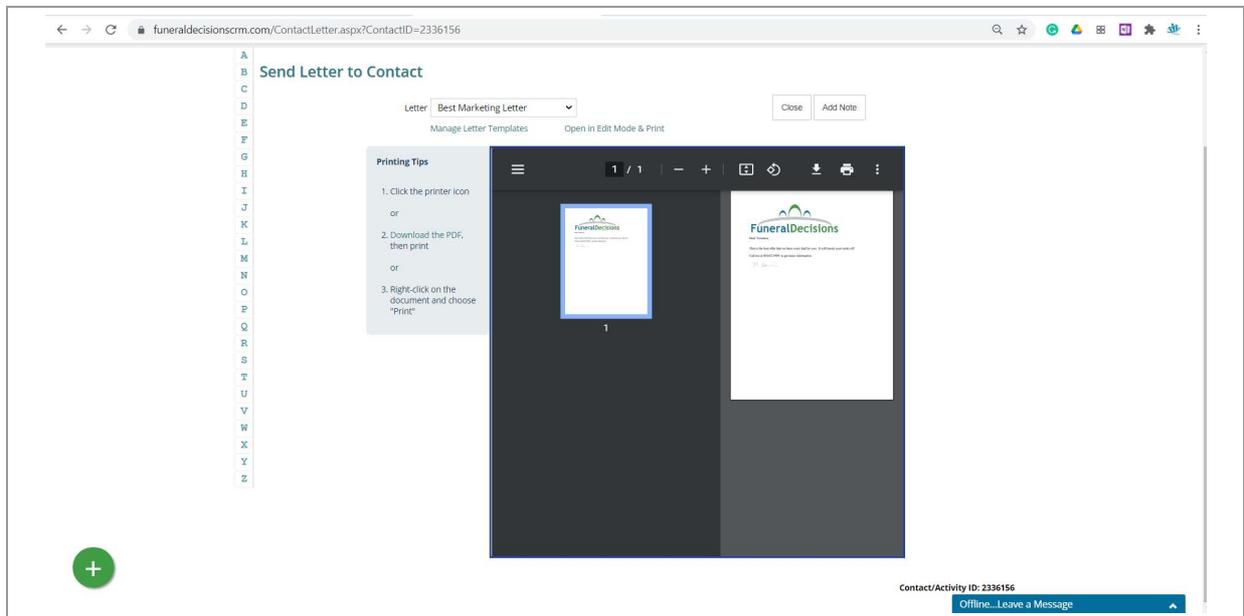
Click on the Letter drop down...



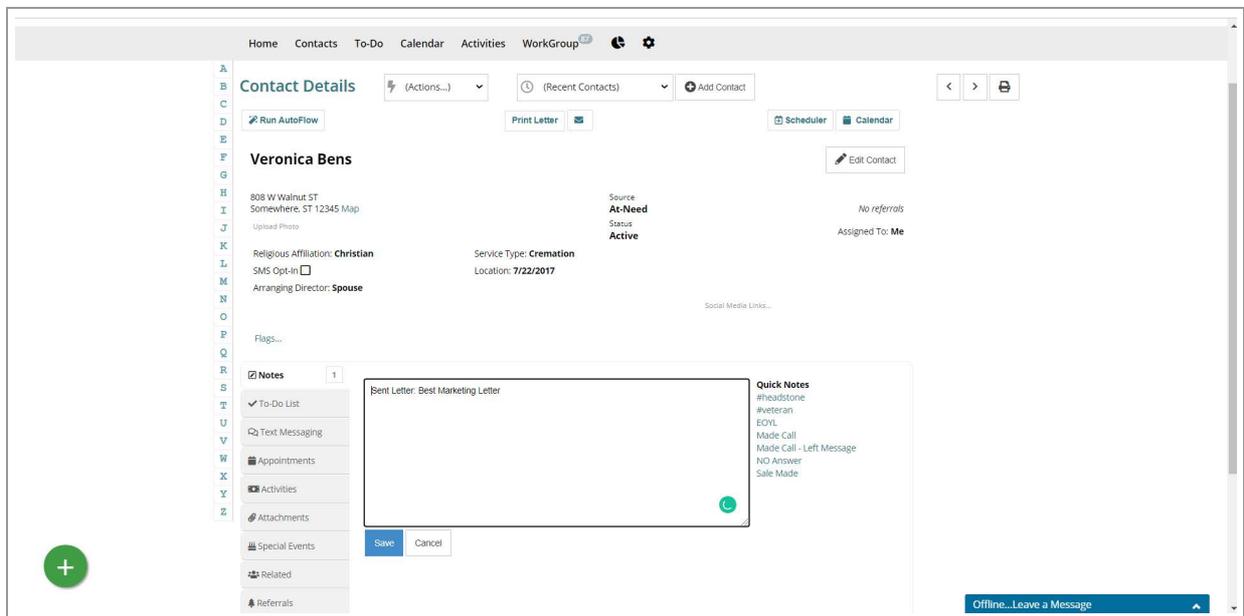
Select the template you wish to print.



The template will load in the blue box. You can print by the printer icon downloading it as a Pdf or right clicking and then printing.



After printing the letter, click on "Add Note"



Click on "Save".

# Sending A Letter To A Group Of People

*FuneralDecisionsCRM*

Send a letter to a group of people

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

Contacts (Recent Contacts) Add Contact

Basic Search Advanced Search

Category Status Source Flag Team Database

Columns: new view Viewing all 87 records. Send Results to WorkGroup

| Name             | Category  | Status              | Source      | Referrals |
|------------------|-----------|---------------------|-------------|-----------|
| , Peach          |           | Deceased            |             | 0         |
| , Peter          |           | Inactive            |             | 0         |
| , Test           |           | Lost                |             | 0         |
| Anthony, Beverly |           | Partial Sale        |             | 0         |
| Ayala, Hall      |           | PreArranged/Sold    | Direct Mail | 0         |
| Ayala, Hall      |           | PrePlanned/Not Paid | Aftercare   | 0         |
| Baxter, Connor   |           | Unknown             | Aftercare   | 0         |
| Baxter, Connor   |           | (empty)             | At-Need     | 0         |
| Bens, Veronica   |           | (not empty)         | At-Need     | 0         |
| Bens, Veronica   |           |                     | Aftercare   | 0         |
| Branch, Remedios | Somewhere | Active              | Direct Mail | 0         |
| Branch, Remedios | Somewhere |                     |             | 0         |
|                  | Somewhere |                     | Direct Mail | n         |

Offline...Leave a Message

1. First you will need to filter your contacts. If you do not know how to filter contacts, please see how to filter and work with groups.
2. After you have your database filtered as needed, click on " Send Results to Work Group"

Home Contacts To-Do Calendar Activities WorkGroup

WorkGroup Clear WorkGroup Add Everyone

Actions Add Contacts Remove Contacts Manage

Contacts in WorkGroup: 87

87 contact(s) added. 0 duplicates skipped. 0 excluded that were marked inactive.

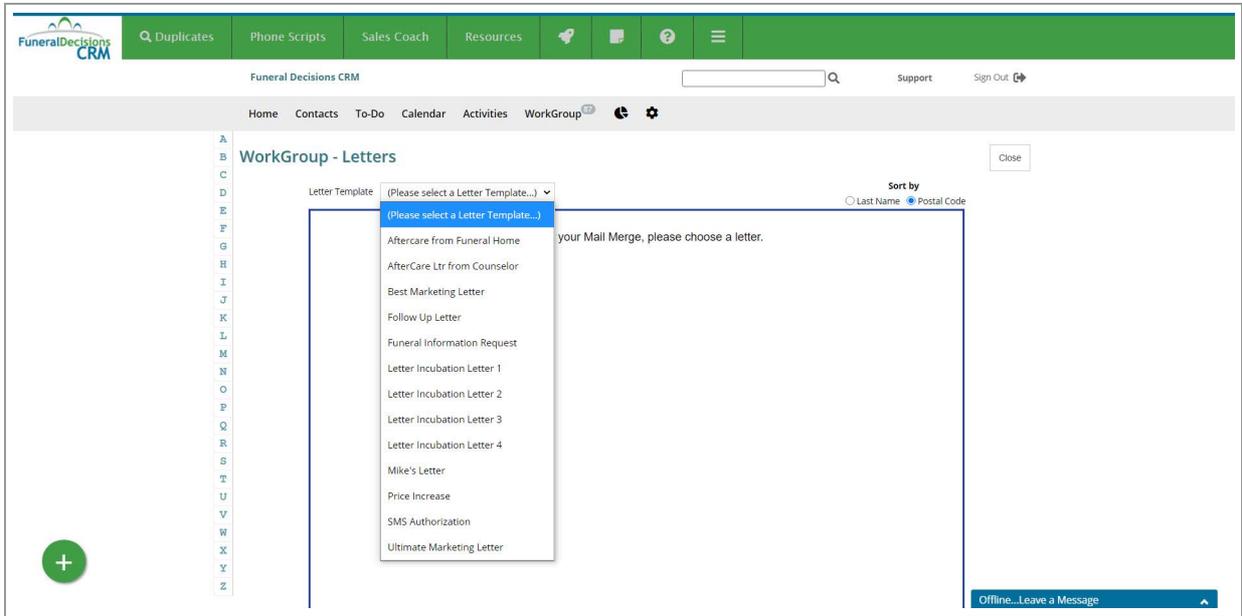
Things You Can Do With Your Workgroup

| Online                  | Offline                | Notes & To-Dos      | Utilities             |
|-------------------------|------------------------|---------------------|-----------------------|
| Email Blast             | Letters                | Batch Add Note      | Group Edit            |
| Email Opt-In Wizard     | Mailing Labels         | Assign a To-Do      | Download Address List |
| Autoresponder Campaigns | Envelopes              | Assign a To-Do Plan | Export Data           |
|                         | Printable Contact List |                     | Delete Contacts       |

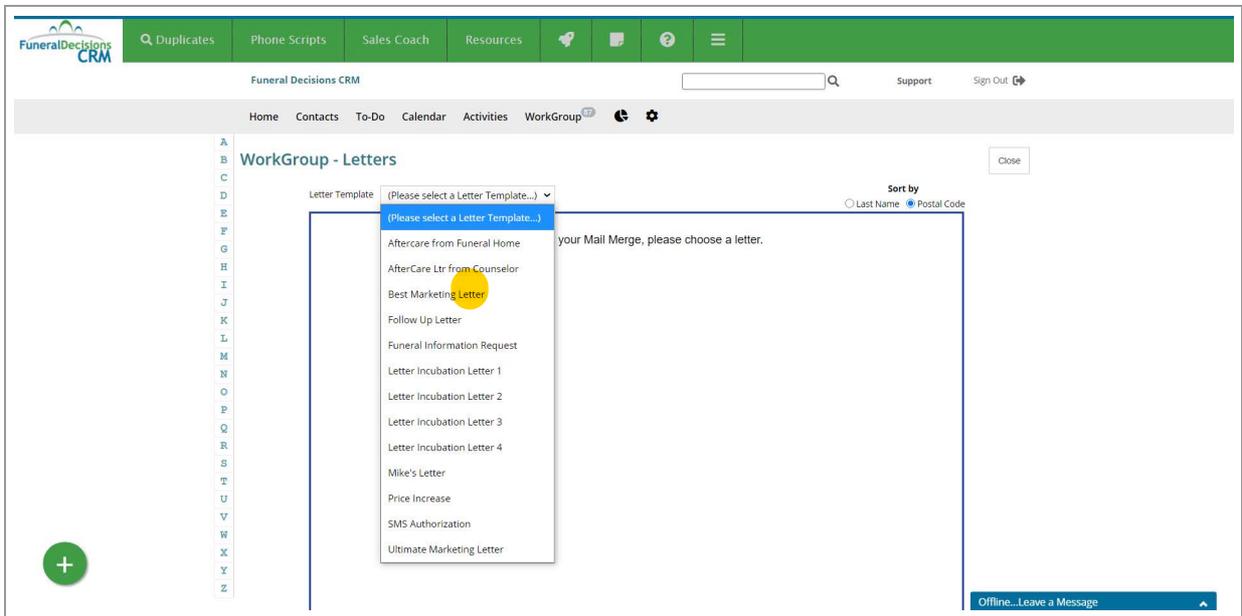
More Actions

Offline...Leave a Message

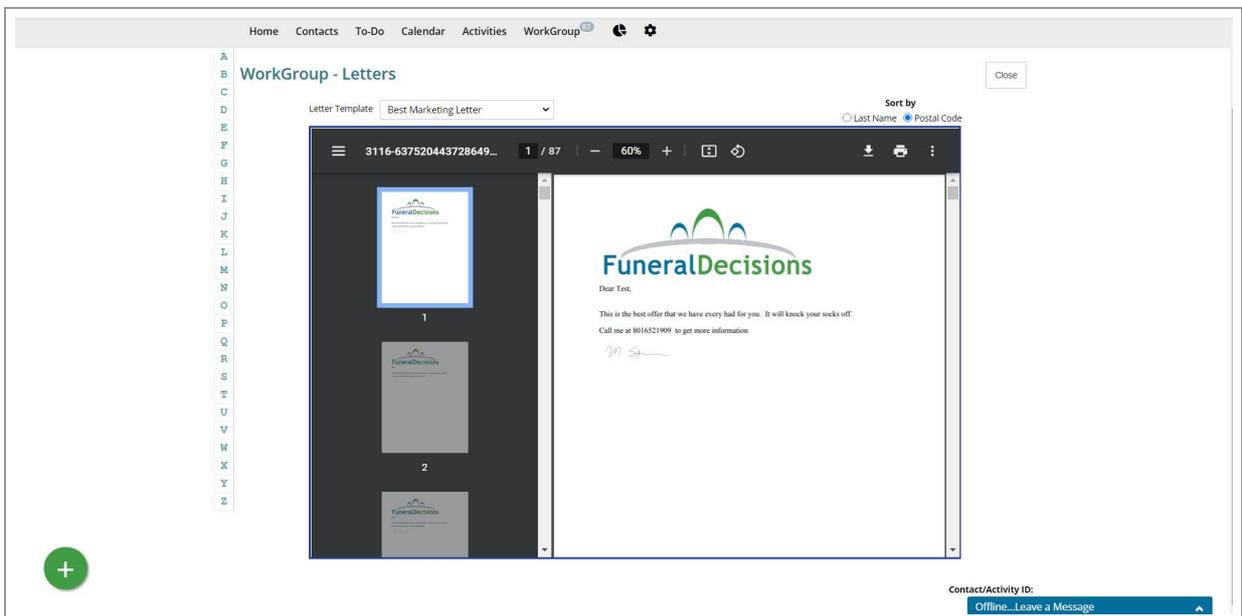
1. Note the number of contacts in the system. If you wish to remove specific users, you can do so with the "Remove Contacts" tab or the "Manage" tab.
2. Click on the "Letters" button.



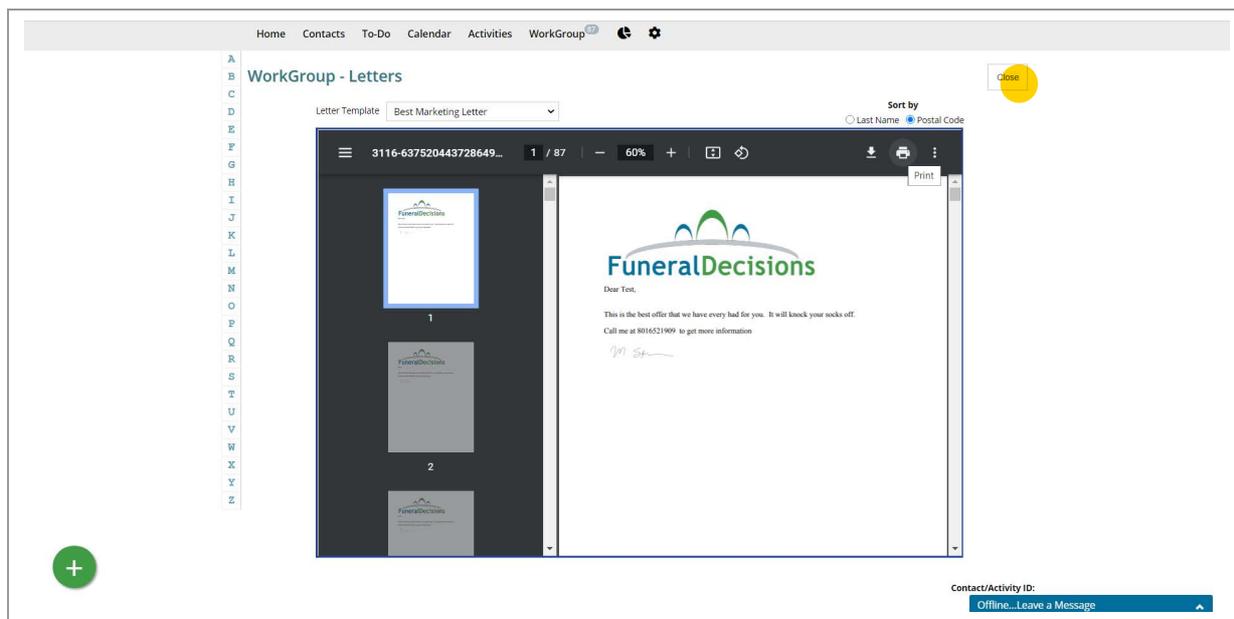
Click on the Letter Template drop down menu



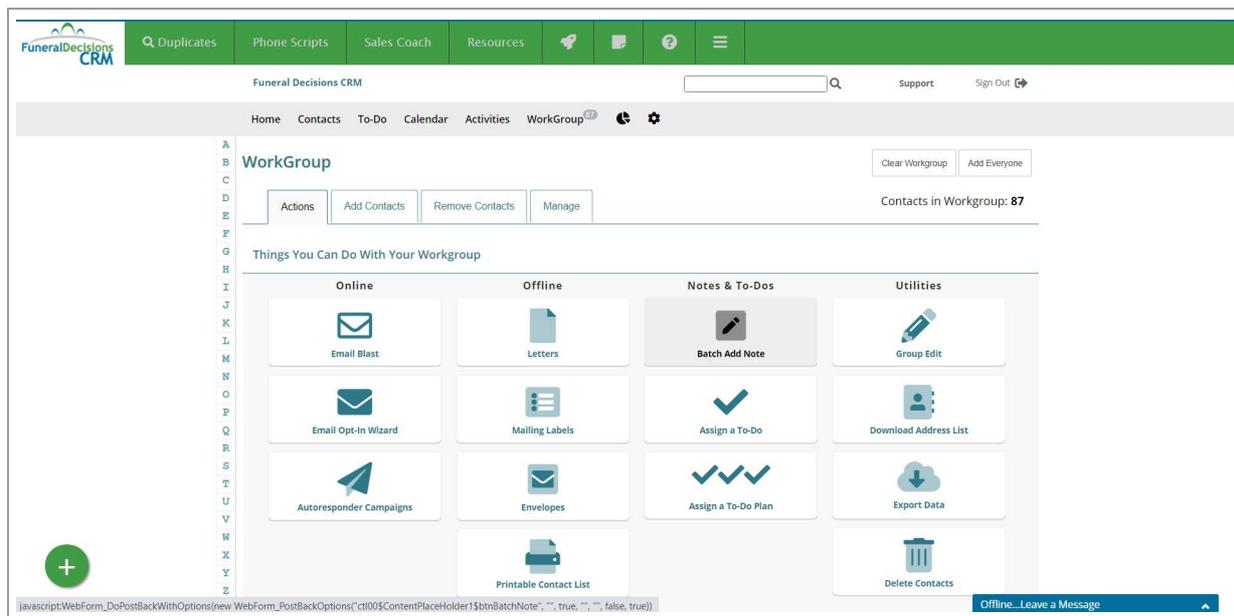
Select the letter template you wish to print out



The letters will show up in the blue box. You will see a printer icon in the upper right corner. You could also Push the arrow to download them as PDF's.



After you have printed your letters click on the "Close" Button.

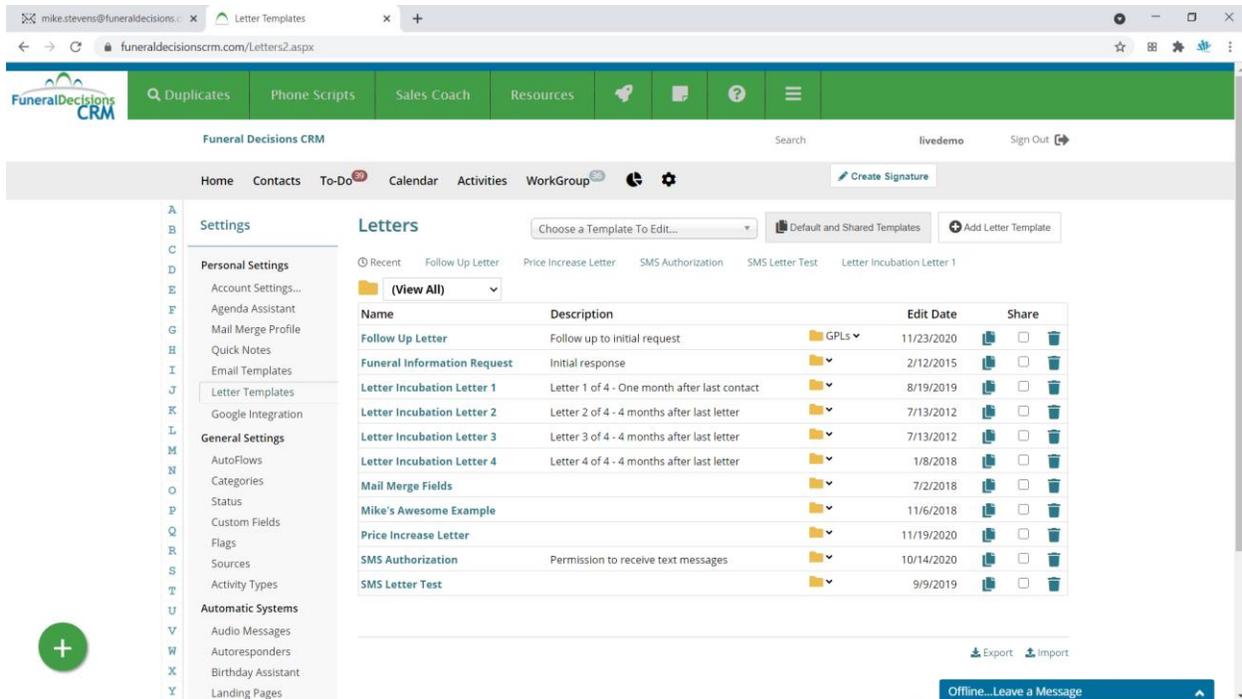


Next click on the "Batch Add Note" button.

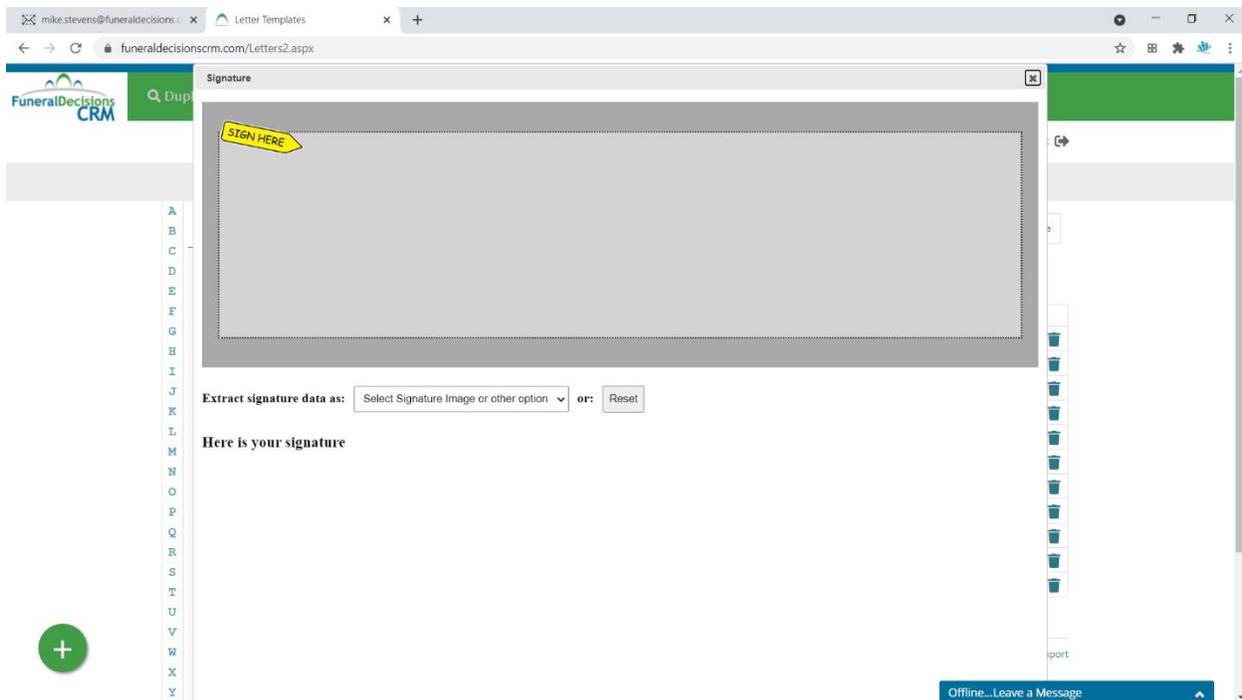
The screenshot displays the FuneralDecisions CRM web application. At the top, there is a green navigation bar with the logo and menu items: Duplicates, Phone Scripts, Sales Coach, Resources, and a hamburger menu. Below this is a secondary navigation bar with Home, Contacts, To-Do, Calendar, Activities, and WorkGroup. The main content area is titled 'WorkGroup - Batch Note'. A modal dialog box is open, titled 'Batch Note', with the instruction 'Add a Note to Each Contact in this Workgroup'. It features a large text input field, a green circular icon on the right, and 'Save' and 'Cancel' buttons at the bottom. A vertical alphabetical index (A-Z) is on the left, and a '+', 'Offline... Leave a Message' status bar is at the bottom.

Enter the name of the template that you sent and click "Save"

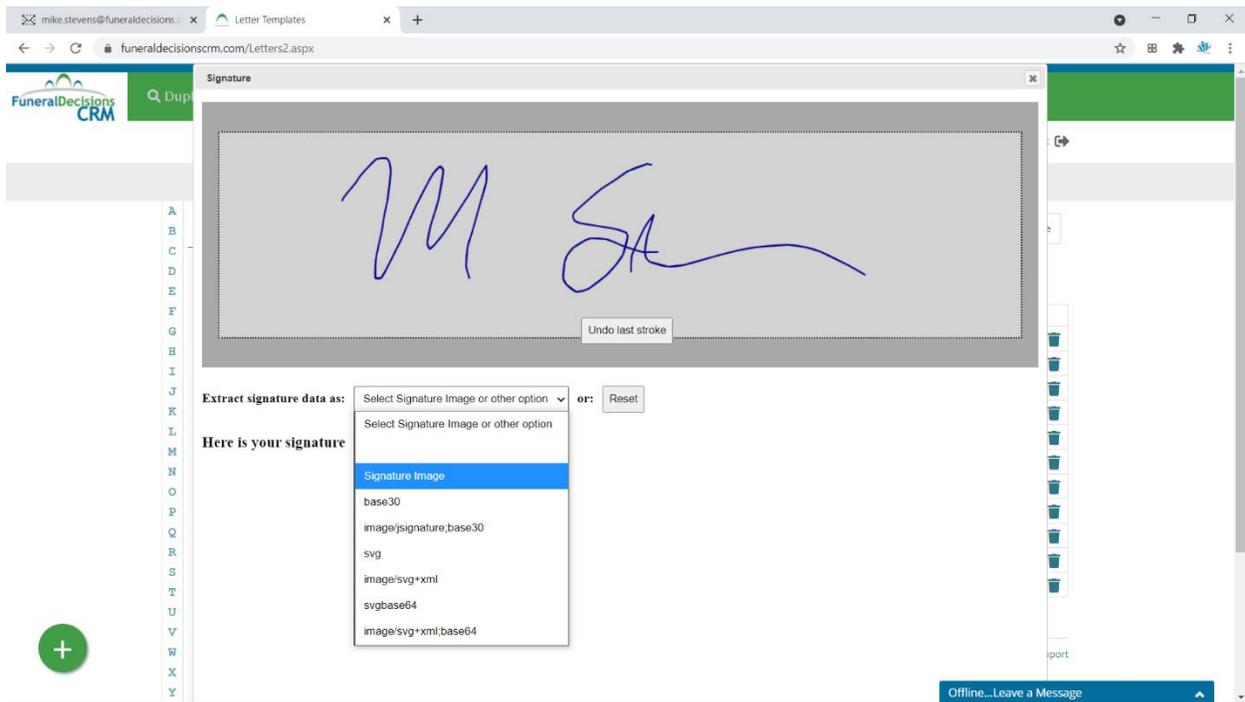
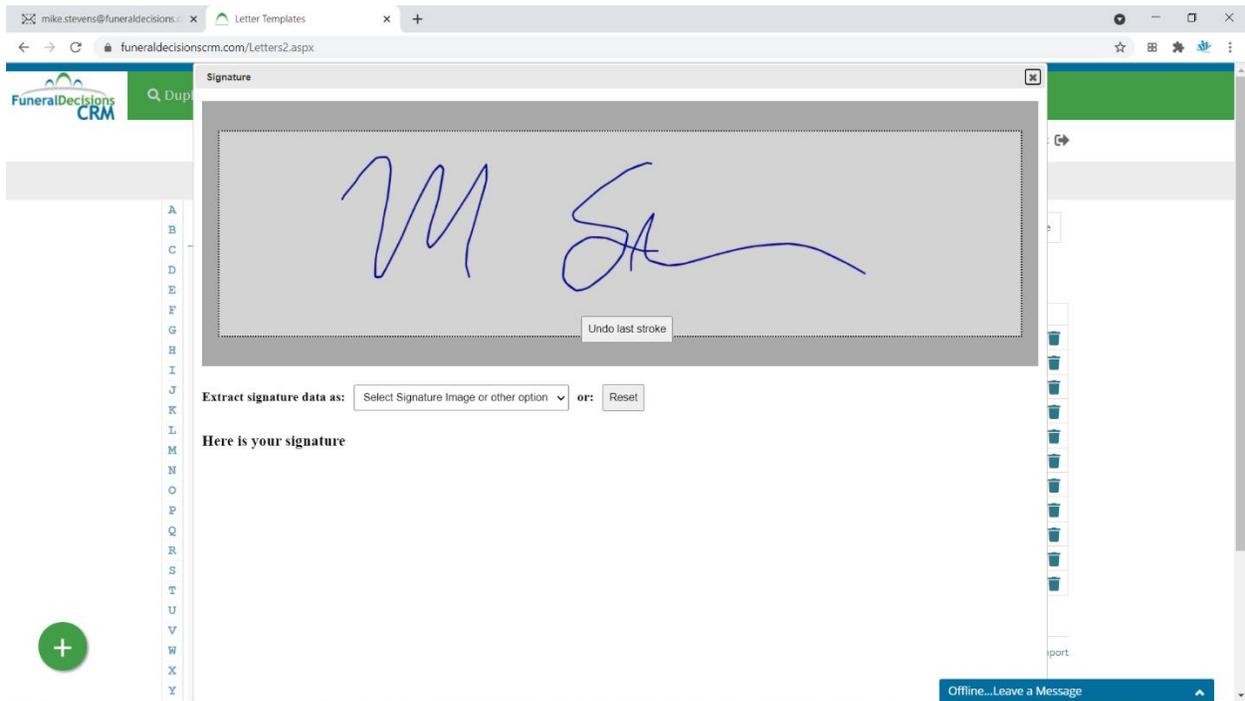
# Create a Digital Signature For a Letter Template



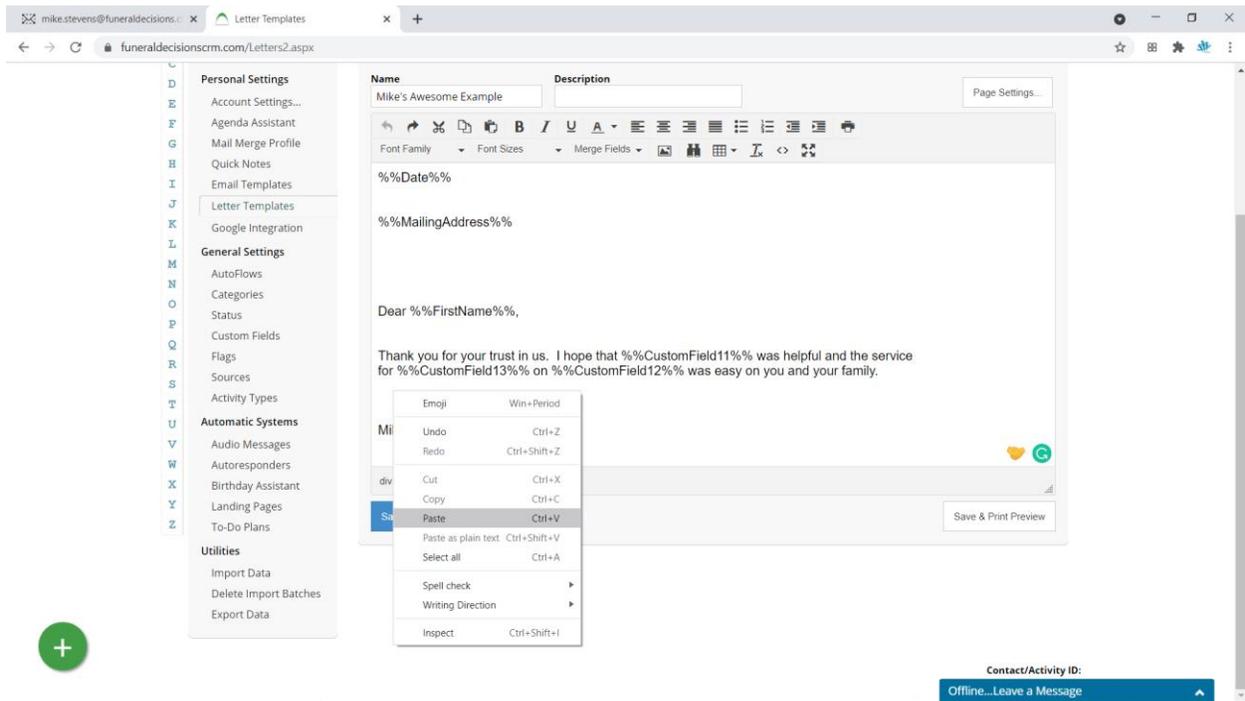
First you need to go to the Letter Template Section from the setting. Then select Create Signature.



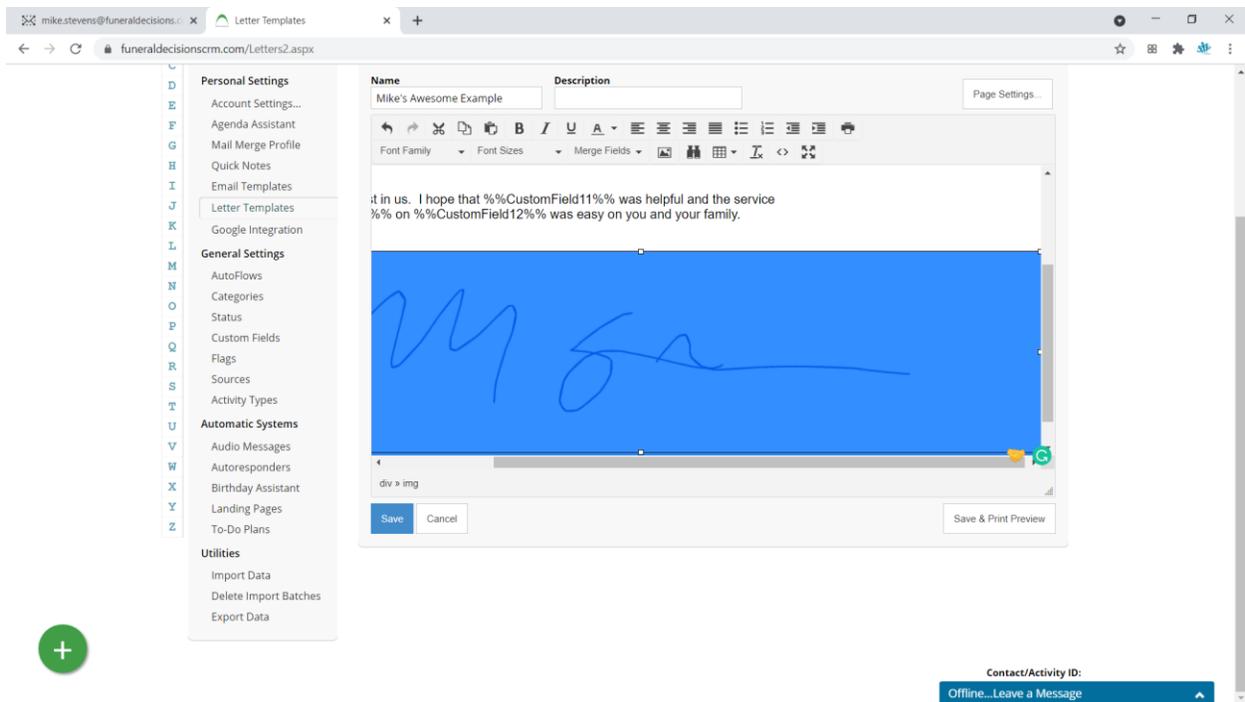
This Box will pop up for you to draw your signature right into the CRM. A touch screen device works best for this.



Once it is Drawn in you will select the extract signature drop down and select the Signature Image. You then will right click on the image that populates and copy it.



After opening a letter template you will paste the signature where you want it in the Letter.



You will then need to highlight and resize the image by grabbing the corners and shrinking the image down.

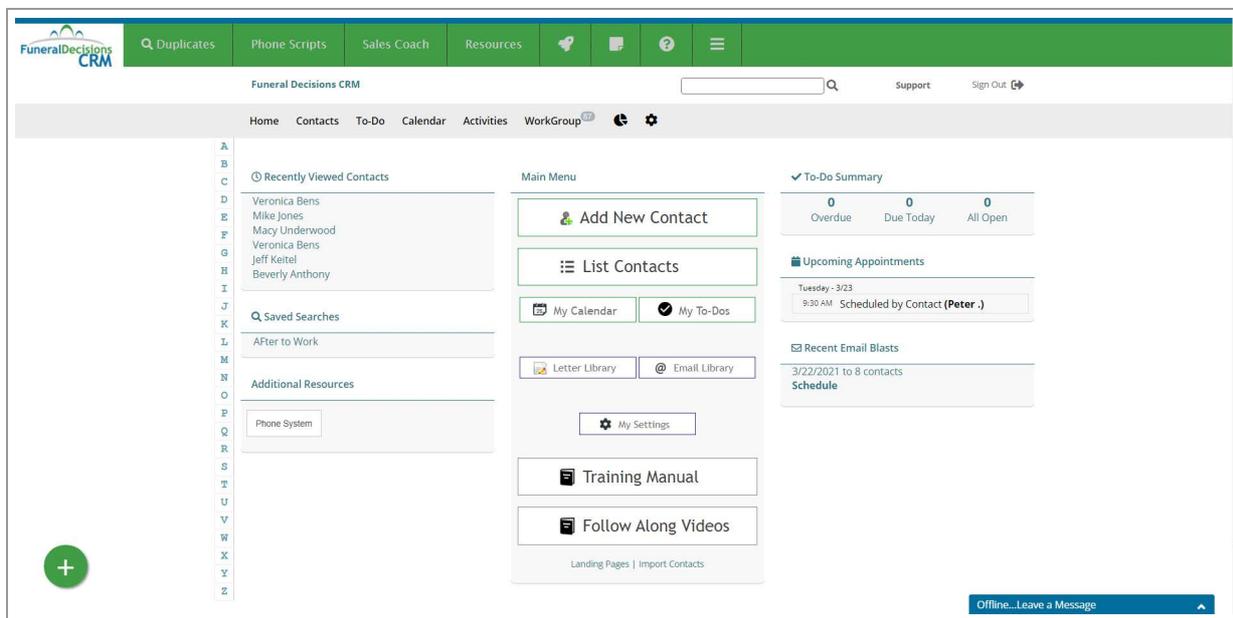
The screenshot shows a web browser window with the URL `funeraldecisionscrm.com/Letters2.aspx`. The application has a top navigation bar with links for Home, Contacts, To-Do, Calendar, Activities, and WorkGroup, along with a 'Create Signature' button. A left sidebar contains a navigation menu with categories: Personal Settings, General Settings, Automatic Systems, and Utilities. The 'Letter Templates' option is selected. The main content area is titled 'Letter Template' and contains a form with fields for 'Name' (filled with 'Mike's Awesome Example') and 'Description'. Below these is a rich text editor with a toolbar and a text area containing the following content:   
%%MailingAddress%%  
  
Dear %%FirstName%%,  
  
Thank you for your trust in us. I hope that %%CustomField11%% was helpful and the service for %%CustomField13%% on %%CustomField12%% was easy on you and your family.  
  
Mike  
  
The signature 'Mike' is followed by a blue 'Save' button and a grey 'Cancel' button. A 'Save & Print Preview' button is located at the bottom right of the editor area. A status bar at the bottom right indicates 'Offline - Leave a Message'.

Finally click save and you are ready to print send out letters

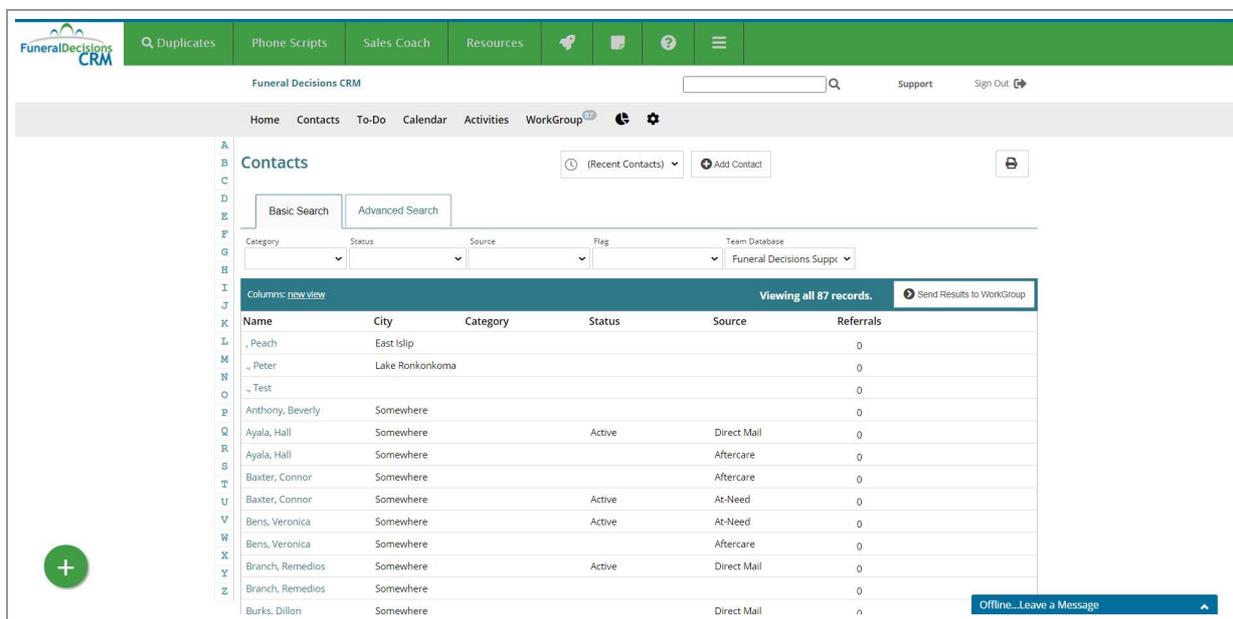
# Filtering Your Database

# Basic Filtering

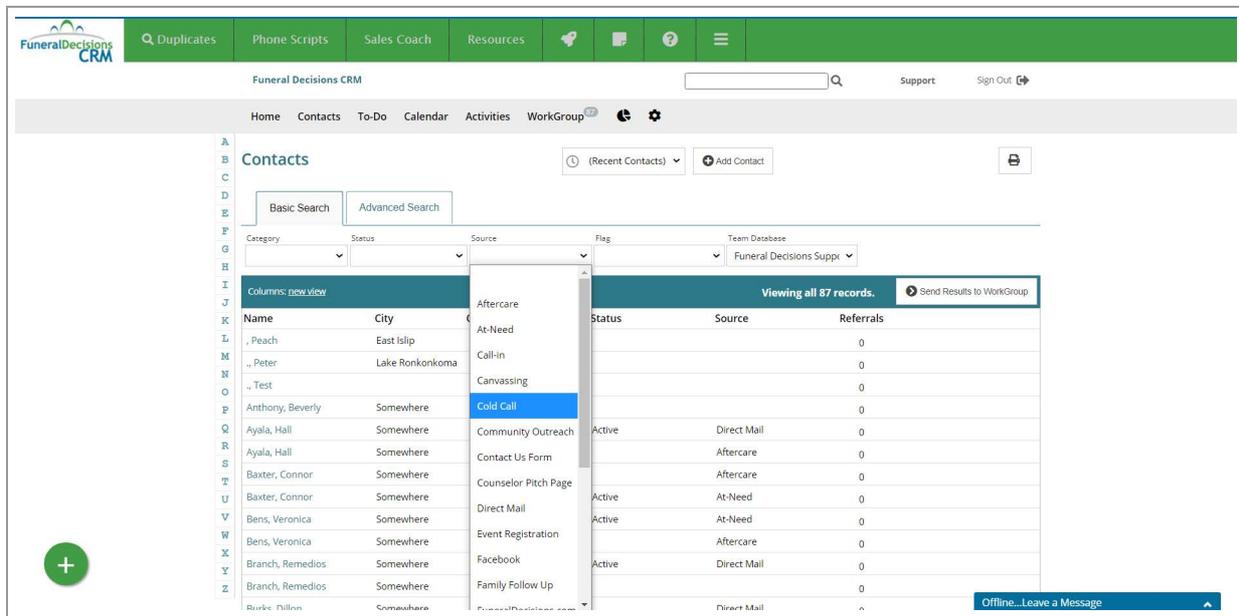
Basic filtering enables simple and quick database filtering. Perfect if you're looking for information by source, status, category or a flag.



Click on "List Contacts"



Now that you are looking at all of the contacts in your database, you will need to use one or a combination of the drop down menus to filter. In this example if we want to find all contacts from "Cold Call" we will click on the "Source" drop down.

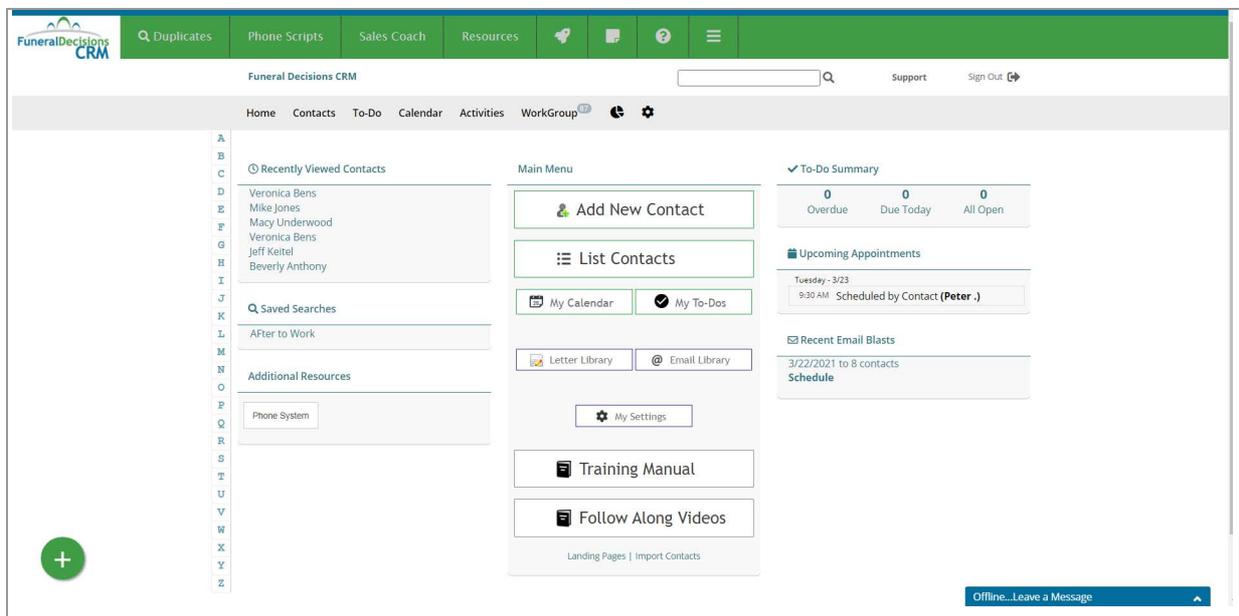


And then select "Cold Call" from the list of sources. From here we can click on "Send Results to Work Group" to work with this group or we can work with individual contacts.

# Advanced Filtering

*FuneralDecisionsCRM*

Sometimes we need to filter down to very specific segments of our database and the "Basic Filter" is just not enough. This is where the "Advanced Filter" comes in.



Click on "List Contacts"

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

Contacts (Recent Contacts) Add Contact

Basic Search Advanced Search

Category Status Source Flag Team Database

Columns: new view Viewing all 87 records. Send Results to WorkGroup

| Name             | City            | Category | Status | Source      | Referrals |
|------------------|-----------------|----------|--------|-------------|-----------|
| , Peach          | East Islip      |          |        |             | 0         |
| , Peter          | Lake Ronkonkoma |          |        |             | 0         |
| , Test           |                 |          |        |             | 0         |
| Anthony, Beverly | Somewhere       |          |        |             | 0         |
| Ayala, Hall      | Somewhere       |          | Active | Direct Mail | 0         |
| Ayala, Hall      | Somewhere       |          |        | Aftercare   | 0         |
| Baxter, Connor   | Somewhere       |          |        | Aftercare   | 0         |
| Baxter, Connor   | Somewhere       |          | Active | At-Need     | 0         |
| Bens, Veronica   | Somewhere       |          | Active | At-Need     | 0         |
| Bens, Veronica   | Somewhere       |          |        | Aftercare   | 0         |
| Branch, Remedios | Somewhere       |          | Active | Direct Mail | 0         |
| Branch, Remedios | Somewhere       |          |        |             | 0         |
|                  |                 |          |        | Direct Mail | n         |

Offline... Leave a Message

Click on the "Advanced Search" tab which is right next the "Basic Search" tab

FuneralDecisions CRM

Grouping Contact Details Custom Fields Campaigns

- Category
- Status
- Source**
- Any Flag
- Include If Assigned Flag
- Exclude If Assigned Flag
- Team Database
- Landing Page Source

- Add Date
- Edit Date
- Last Click Date
- Last Open Date
- Last Note Date

- Opt-In
- Email Opt-In Status

- First Name
- Last Name
- Other First Name
- Other Last Name
- Any Name
- Company
- Address
- City
- State
- Zipcode
- Any Phone #
- Email
- Other Email
- Age
- Other Age
- Brief Note
- Notes
- Other System ID

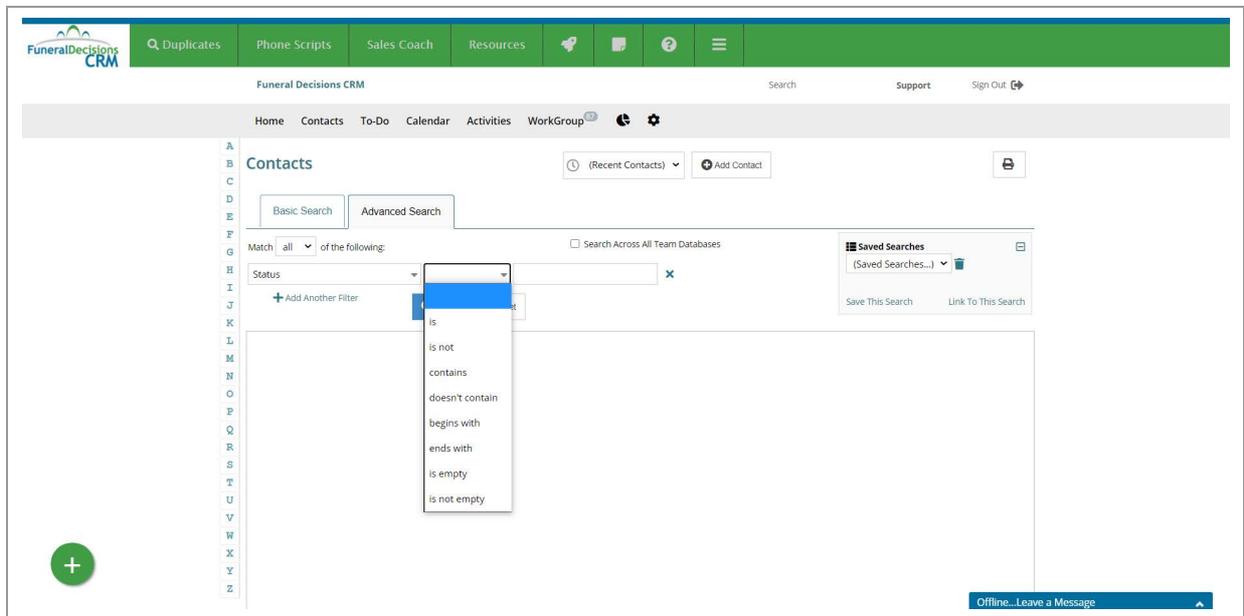
- Religious Affiliation
- Service Type
- Burial Type
- No. Crypts/Plots
- Burial Location
- Veteran
- Marriage Status
- Salutation
- Campaign
- SMS Opt-In
- City on Inquiry
- Location
- Beneficiary
- Arranging Director
- Deceased Name
- Date of Service
- Relationship To Deceased

- Active AutoFlow
- Completed AutoFlow
- Active Autoresponder
- Completed Autoresponder
- Has Any Active Autoresponder
- Has No Active Autoresponder
- Has Completed Any Autoresponder
- Never Assigned This Autoresponder
- To-Dos

- Other
- Has Upcoming Appointment
- In WorkGroup
- Incomplete Mailing Address
- Inactive

Offline... Leave a Message

Select the field that you want to filter on from the pop up menu.



Then select one of the options:

Is ...this is the same thing as equals

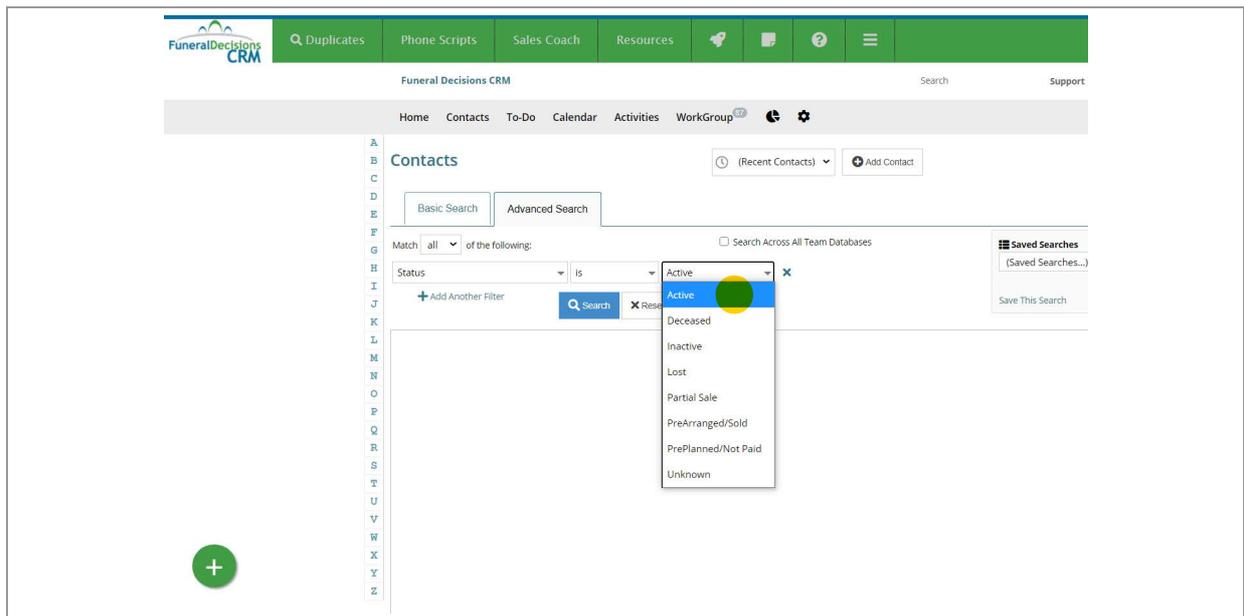
Is Not ...this is 'does not' equal

Contains ...this means that you only need to have part of the search string. So searching for a first name that contains "And" would return "Andy", "Andrew" and "Andrea"

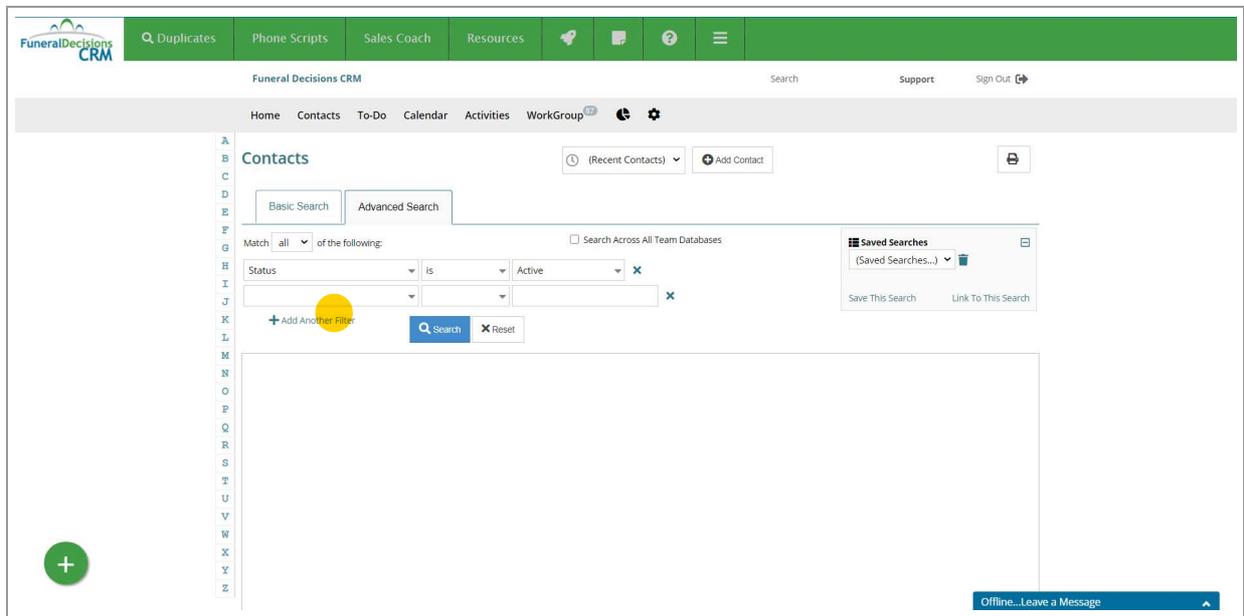
Doesn't Contain ...means that it cannot contain the search string.

Begins With ...will return all results that begin with your search

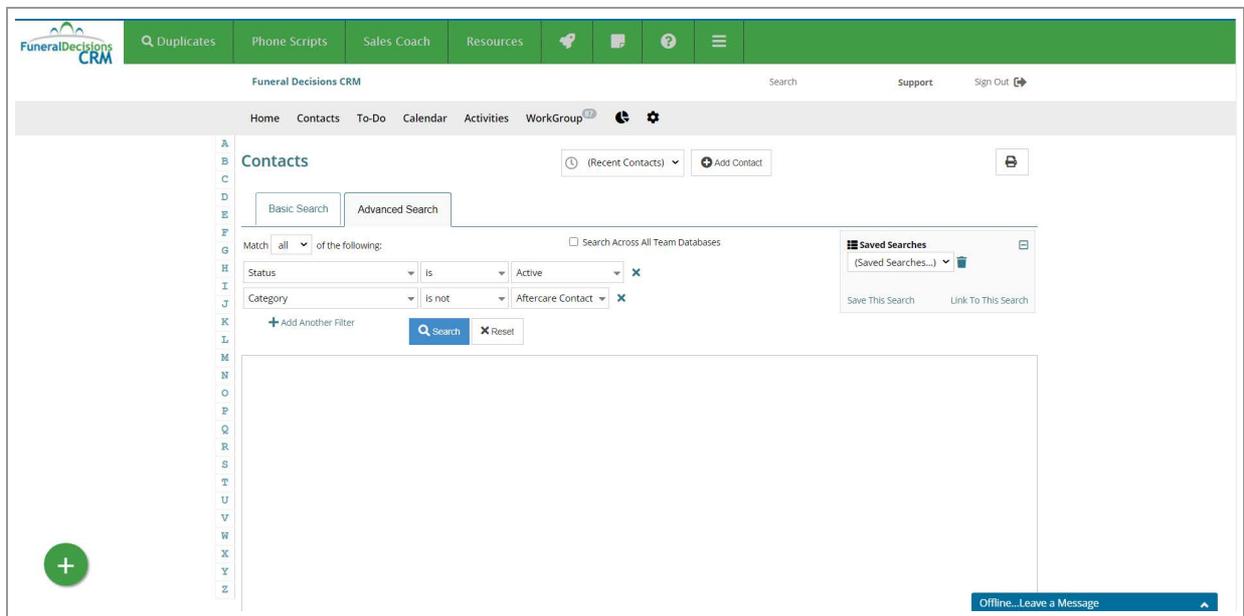
Ends With ...will return all results that end with your search



This third field will either turn into a drop down or remain as a text field you can type, depending on your search. Here it is a drop down, if it remains a text field, simply type in what you wish to search for.



1. To add another filter, simply click on " Add Another Filter ".
2. Repeat the process in the previous step.



1. You can add up to 6 filters.
2. Once you are finished adding filters, click on " Search ".

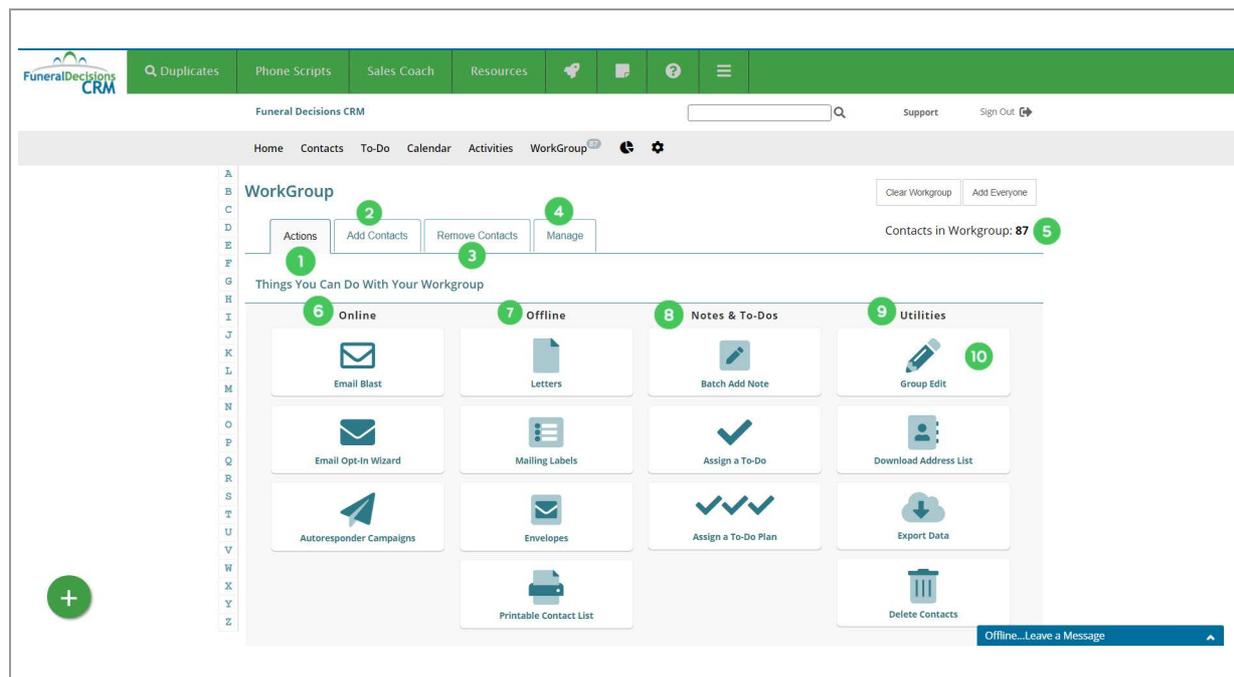
# Work Groups

# Overview

Workgroups is the way that FuneralDecisionsCRM allows you to work with groups of contacts in your database simply and quickly.

In order to use Work Groups, you will first need to filter your database and send those results to Work Groups. Please see the section on Filtering Your Database for this.

## The Work Groups Dashboard



- 1.) These are where your main actions are located
- 2.) This enables you to add additional contacts to the work group by source, status, flag, category, etc.
- 3.) This enables you to remove contacts from the work group by source, status, flag, category, etc.
- 4.) The 'Manage' tab lets you remove individuals from the work group one by one
- 5.) Here you can see how many contacts are currently in your work group
- 6.) "Online" actions column
  - a. Email Blast - send an email to your work group immediately or schedule it for up to a week in advance
  - b. Email Opt-In Wizard - Opt-in your contacts in bulk
  - c. Autoresponder Campaigns - Easily put your entire work group on an automated email series
  - d. Email List - Get all of the emails for your work group for use in other email systems
- 7.) "Offline" actions column
  - a. Letters - Print a letter template to the entire work group
  - b. Mailing Labels - Print out mailing labels for the entire work group. Uses Avery 5160/8160 labels.
  - c. Envelopes - Easily print out envelopes for the entire work group
  - d. Print out the names and addresses of your entire work group
- 8.) Notes & To-Dos
  - a. Batch Add Note - Add a note to the entire work group
  - b. Assign a To-Do - Add a single To-Do item to the entire work group
  - c. Assign a To-Do Plan - Add a To-Do Plan to the entire work group
- 9.) Utilities
  - a. Group Edit - Edit the Source, Status, Category, remove or add flags, and if you are a Manager, bulk move contacts between counselors.
  - b. Download Address List - Download an address list of your work group for use in other programs
  - c. Export Data - Export the contacts and notes for your work group
  - d. Delete Contacts - Delete all the contacts in your work group.
- 10.) Group Edit - this is a very important button for Managers. When needing to move multiple contacts between counselors, this is where you would complete that task.

# Saving Groups - Dynamic

FuneralDecisionsCRM

This allows you to search for individuals who match certain criteria and it will automatically add or remove contacts as their status changes.

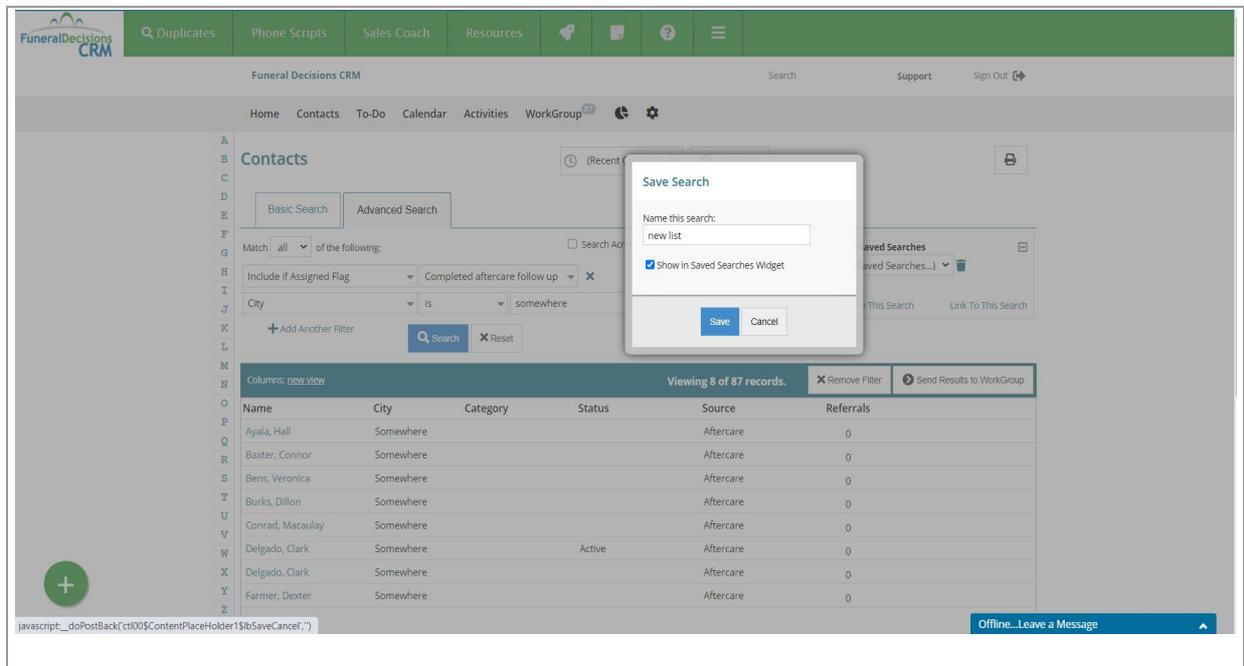
The screenshot shows the FuneralDecisionsCRM interface. The top navigation bar includes links for Duplicates, Phone Scripts, Sales Coach, Resources, and a menu icon. Below this is the 'Funeral Decisions CRM' header with search, support, and sign out options. The main content area is titled 'Contacts' and features a search bar with 'Basic Search' and 'Advanced Search' tabs. The 'Advanced Search' tab is active, showing a filter for 'City is somewhere'. A 'Saved Searches' box is visible on the right. Below the search filters is a table with 8 records, showing columns for Name, City, Category, Status, Source, and Referrals. The table data is as follows:

| Name             | City      | Category | Status | Source    | Referrals |
|------------------|-----------|----------|--------|-----------|-----------|
| Ayala, Hall      | Somewhere |          |        | Aftercare | 0         |
| Baxter, Connor   | Somewhere |          |        | Aftercare | 0         |
| Bens, Veronica   | Somewhere |          |        | Aftercare | 0         |
| Burks, Dillon    | Somewhere |          |        | Aftercare | 0         |
| Conrad, Macaulay | Somewhere |          |        | Aftercare | 0         |
| Delgado, Clark   | Somewhere |          | Active | Aftercare | 0         |
| Delgado, Clark   | Somewhere |          |        | Aftercare | 0         |
| Farmer, Dexter   | Somewhere |          |        | Aftercare | 0         |

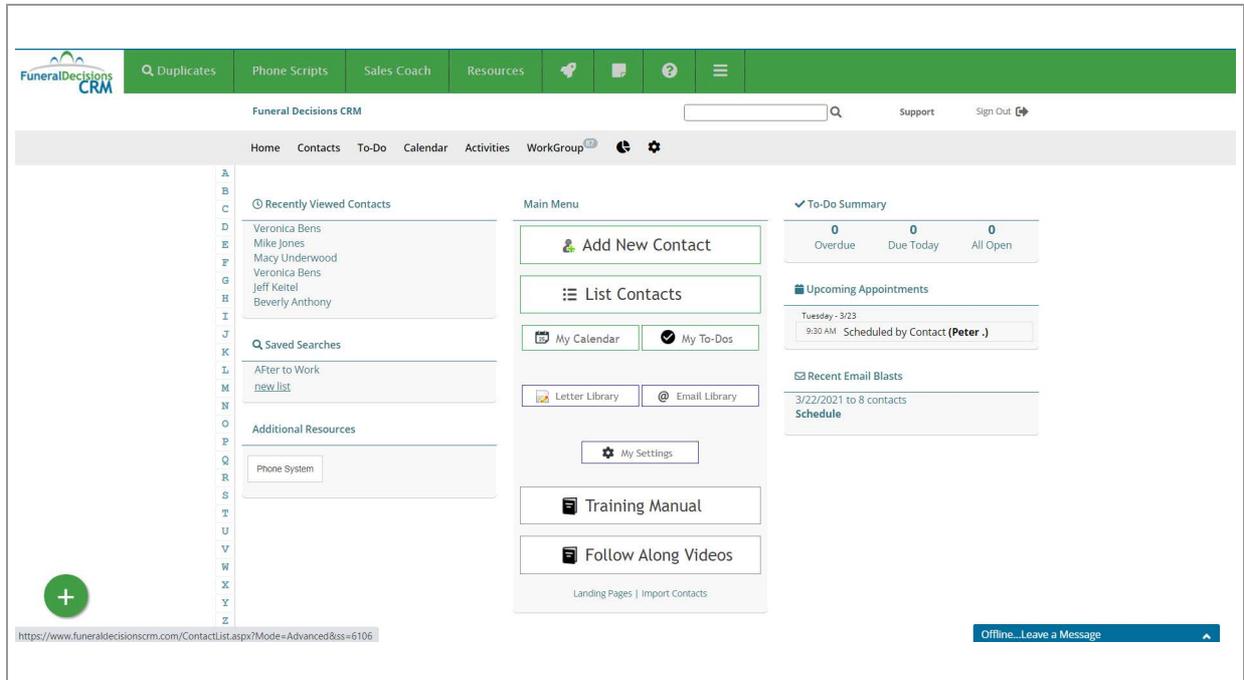
First create the filter that will give you the group you are looking for. This needs to be completed in the "Advanced Search" Tab. Once you have built the filter, click "Search".

This screenshot is identical to the previous one, but with a yellow circle highlighting the 'Save This Search' button in the 'Saved Searches' box on the right side of the search filters. The table data remains the same as in the previous screenshot.

To save this group (which will dynamically change based on new leads being added and existing leads falling out because of status changes), click on the "Save This Search" links in the "Saved Searches" box.



Type in the name of the Group and then click on the "Show On Home Page" box and then click "Save".



Your group will now be saved and a link to it will show up on the Home Page under "Saved Searches".

## Saving Groups - Static

*FuneralDecisionsCRM*

If you want to save a group that will not change, meaning the contact will always be apart of this group, there are two methods...one if you have administrator access and one if you do not.

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

Contacts (Recent Contacts) Add Contact

Basic Search Advanced Search

Match: all of the following: Search Across All Team Databases

Include if Assigned Flag Completed aftercare follow up

City is somewhere

Search Reset

Viewing 8 of 87 records. Remove Filter Send Results to WorkGroup

| Name             | City      | Category | Status | Source    | Referrals |
|------------------|-----------|----------|--------|-----------|-----------|
| Ayala, Hall      | Somewhere |          |        | Aftercare | 0         |
| Baxter, Connor   | Somewhere |          |        | Aftercare | 0         |
| Bens, Veronica   | Somewhere |          |        | Aftercare | 0         |
| Burks, Dillon    | Somewhere |          |        | Aftercare | 0         |
| Conrad, Macaulay | Somewhere |          |        | Aftercare | 0         |
| Delgado, Clark   | Somewhere |          | Active | Aftercare | 0         |
| Delgado, Clark   | Somewhere |          |        | Aftercare | 0         |
| Farmer, Dexter   | Somewhere |          |        | Aftercare | 0         |

Offline...Leave a Message

First build the filter that will give you the group you are looking for and click "Search".  
Next click the "Send Results to WorkGroup" button.

If you are an Administrator...

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

WorkGroup Clear WorkGroup Add Everyone

Contacts in Workgroup: 8

8 contact(s) added. 0 duplicates skipped. 0 excluded that were marked inactive.

Things You Can Do With Your Workgroup

| Online                 | Offline        | Notes & To-Dos      | Utilities             |
|------------------------|----------------|---------------------|-----------------------|
| Email Blast            | Letters        | Batch Add Note      | Group Edit            |
| Email Opt-In Wizard    | Mailing Labels | Assign a To-Do      | Download Address List |
| Autoreponder Campaigns | Envelopes      | Assign a To-Do Plan | Export Data           |

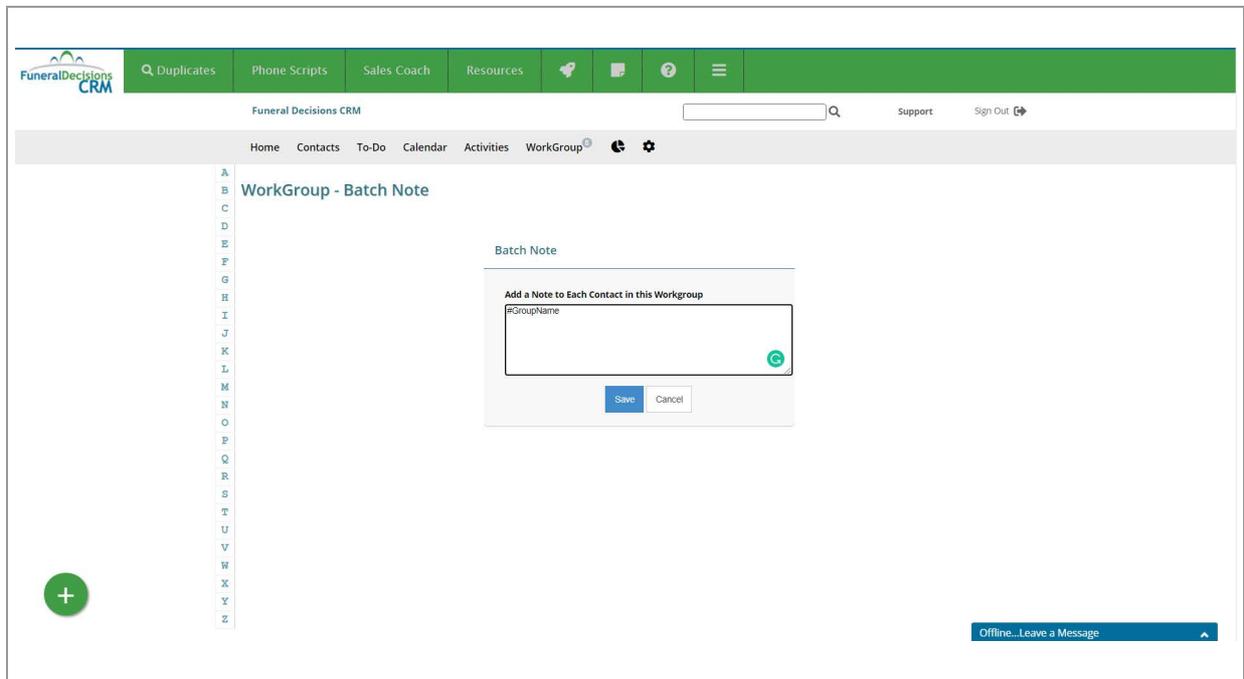
Offline...Leave a Message

If you have an administrator level access, then you should click on the "Group Edit" button.

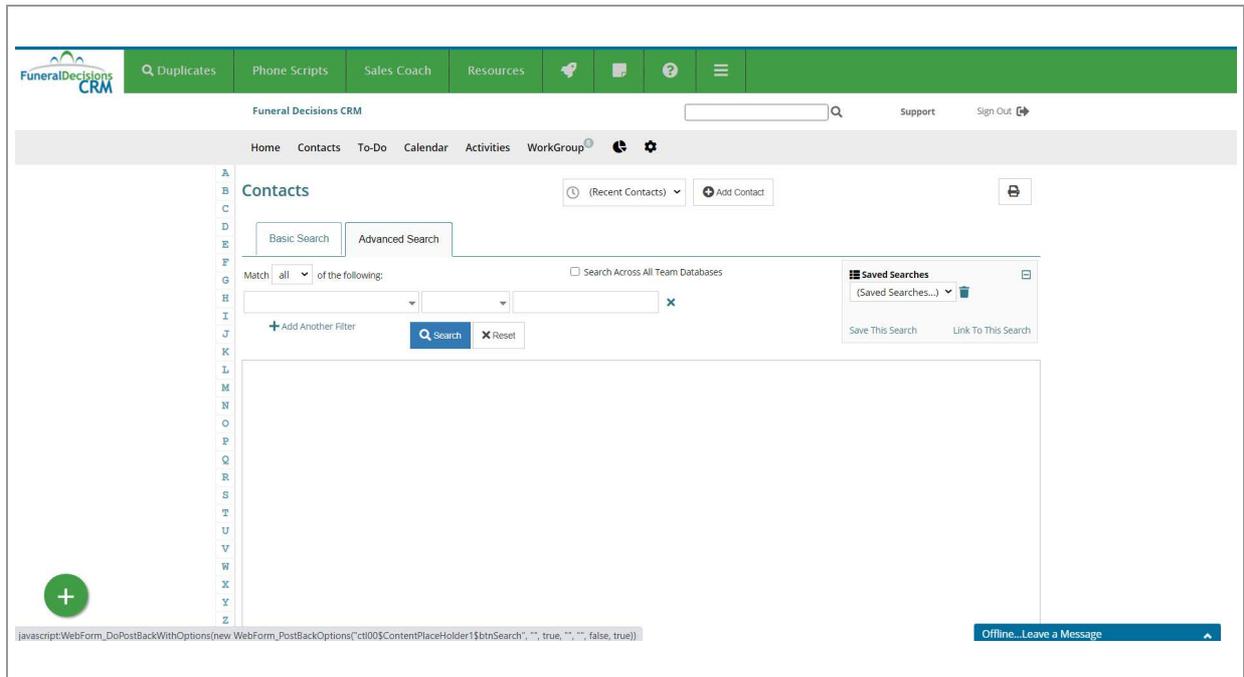
Next click on the "Add Flag..." drop down and select the flag that is the group's name. If you do not have a flag for this group yet, simply go to settings, create a flag, and then go back into Work Group and add the flag.

If you are a Counselor...

If you have a counselor with out the ability to create custom flags, then you should click on the "Batch Add Note" button.



Type in the name of the group as one word, starting with a hash tag...so "#GroupName". This will make it searchable in the notes section. Then click "Save".



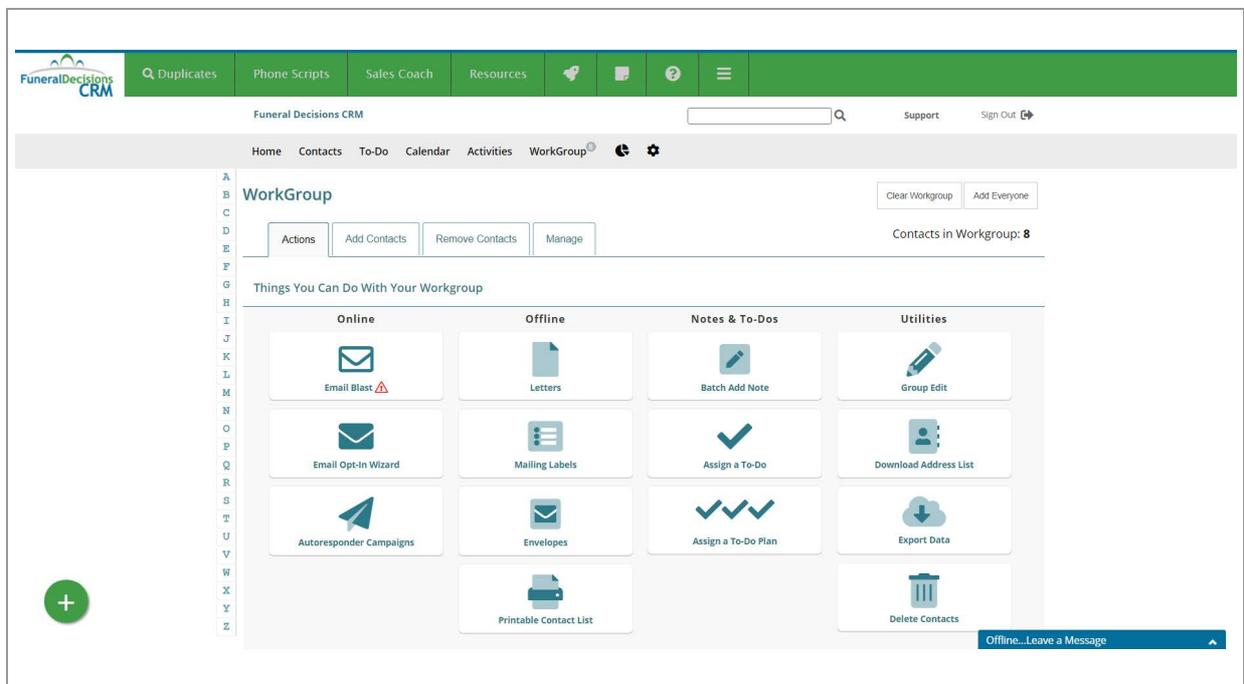
Now that you have the group created tagged...anytime you need to access that group go to "Advanced Search" and search by flag or by note. If you used the note method your search would look like the above where "Note" "Contains" "#GroupName". If you used a flag you can simply use "Basic Search" or the "Advanced Search" on that flag.

Enter the name of the template that you sent and click "Save"

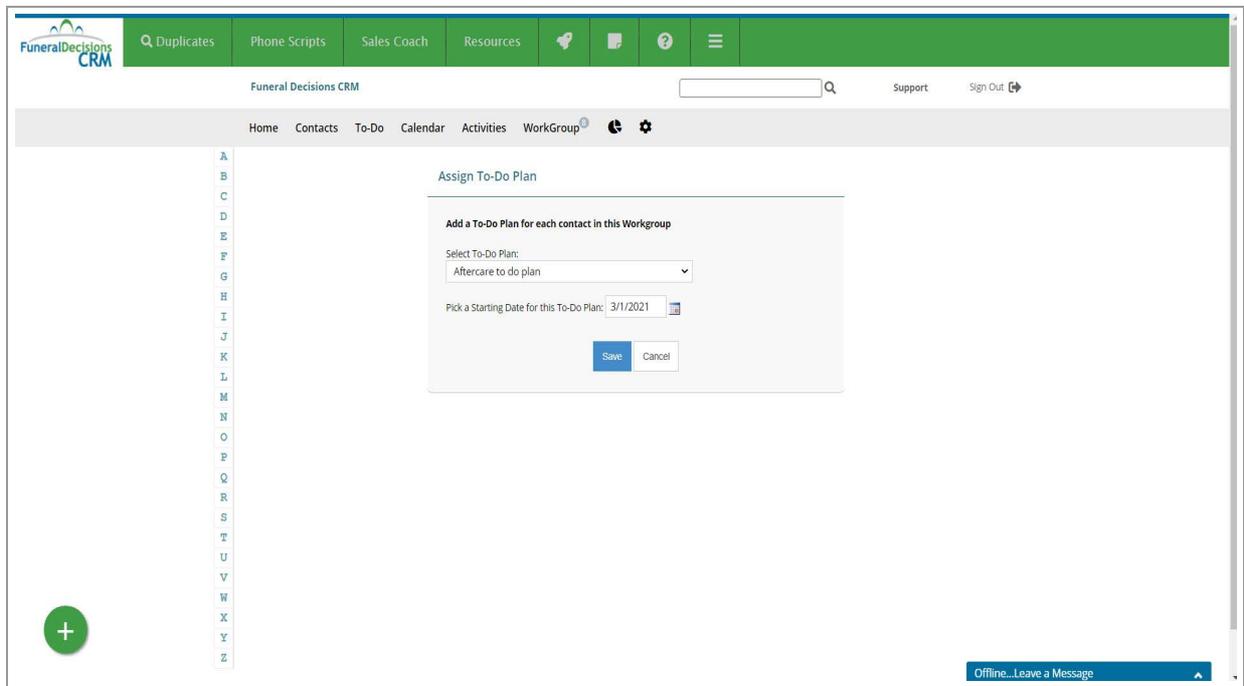
# Launch a To-Do Plan for a Group of Contacts

*FuneralDecisionsCRM*

Add a To-Do Plan to a group of contacts.



1. Filter for your contacts and add them to Work Group
2. Click on the "Assign a To-Do Plan" button under the "Notes & To-Dos" column



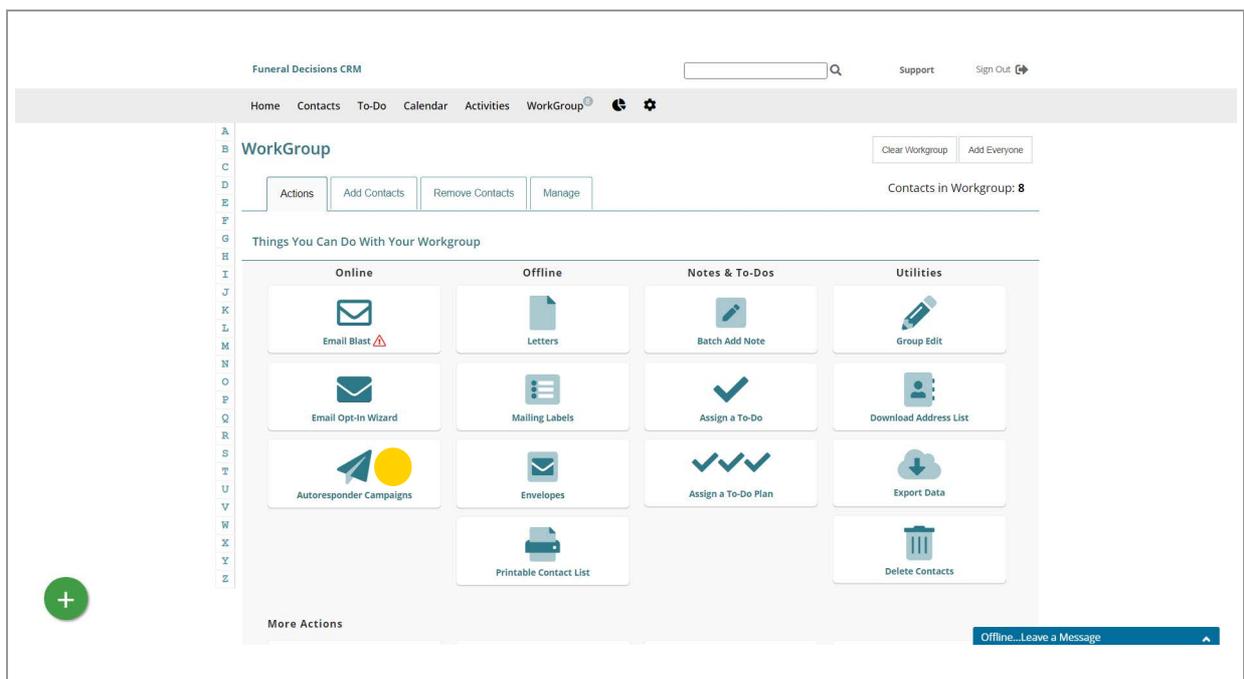
Select the To-Do plan you wish to add and the starting date, then click "Save".

# Launch An Autoresponder Campaign - Groups

*FuneralDecisionsCRM*

Launch an autoresponder

Put a Group of Contacts on a Campaign



1. Filter your contacts as needed (see tutorial on filtering if needed) and add to ClientTouch
2. Click on "Autoreponder Campaigns"

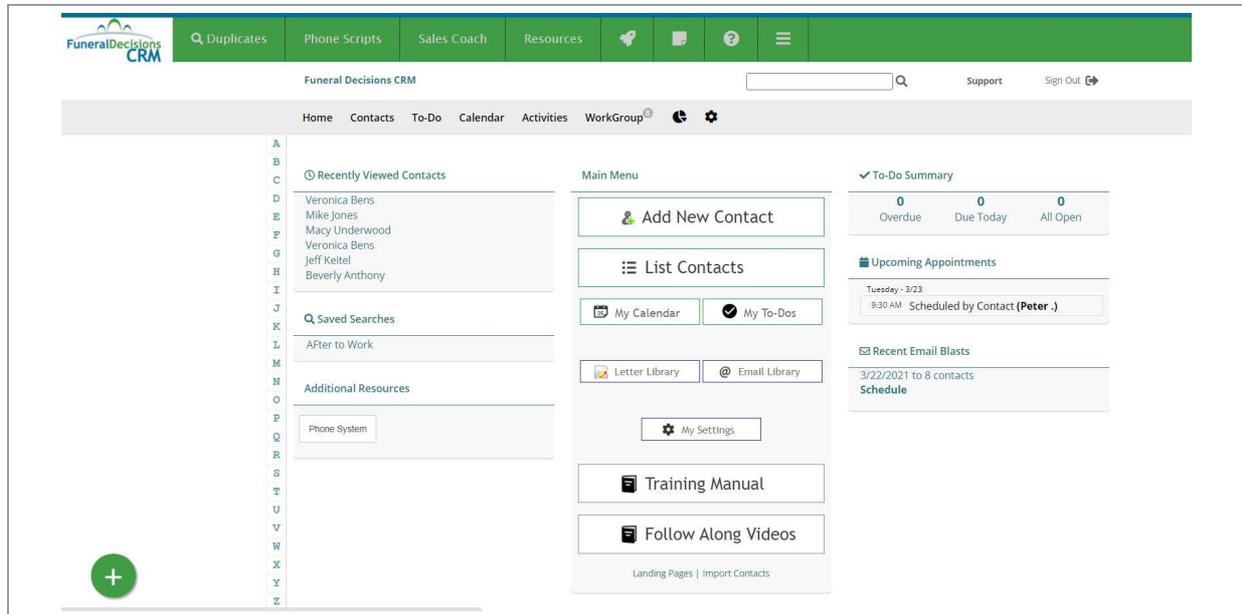
The screenshot displays the FuneralDecisions CRM interface. At the top, there is a green navigation bar with the logo and menu items: Duplicates, Phone Scripts, Sales Coach, Resources, and icons for help, search, and settings. Below this is a search bar and 'Support' and 'Sign Out' links. A secondary navigation bar includes 'Home', 'Contacts', 'To-Do', 'Calendar', 'Activities', and 'WorkGroup'. The main content area features a vertical alphabetical index (A-Z) on the left and a central 'Autoresponders' dialog box. The dialog box has three radio button options: 'Add these Opted-in contacts to the following campaign:' (selected), 'Remove these contacts from the following campaign:', and 'Remove these contacts from ALL campaigns'. Each of the first two options has a dropdown menu labeled '(Choose a campaign)'. A green circle with the number '1' is positioned above the first dropdown. At the bottom of the dialog, there is a green circle with the number '2' next to 'Apply' and 'Cancel' buttons. A '+ ' button is visible in the bottom left corner of the main interface, and an 'Offline...Leave a Message' button is in the bottom right.

Then select the campaign name from the drop down (or likewise, remove them from a campaign) and click "Apply".

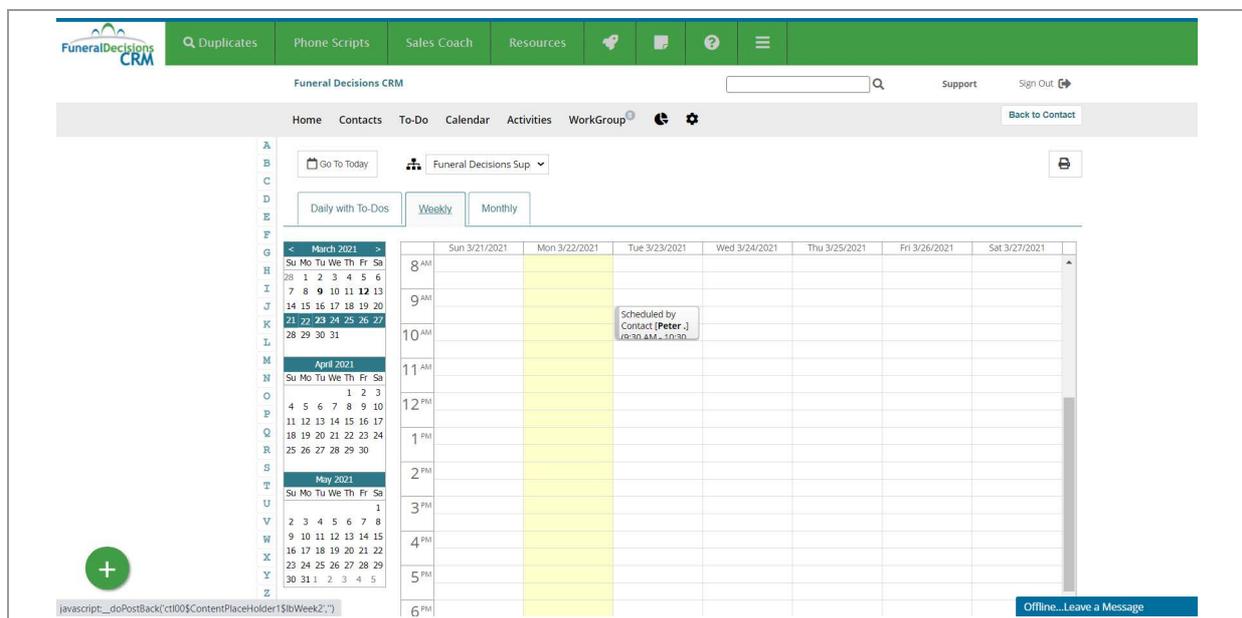
# The Calendar

# Overview

Using the FuneralDecisionsCRM calendar.

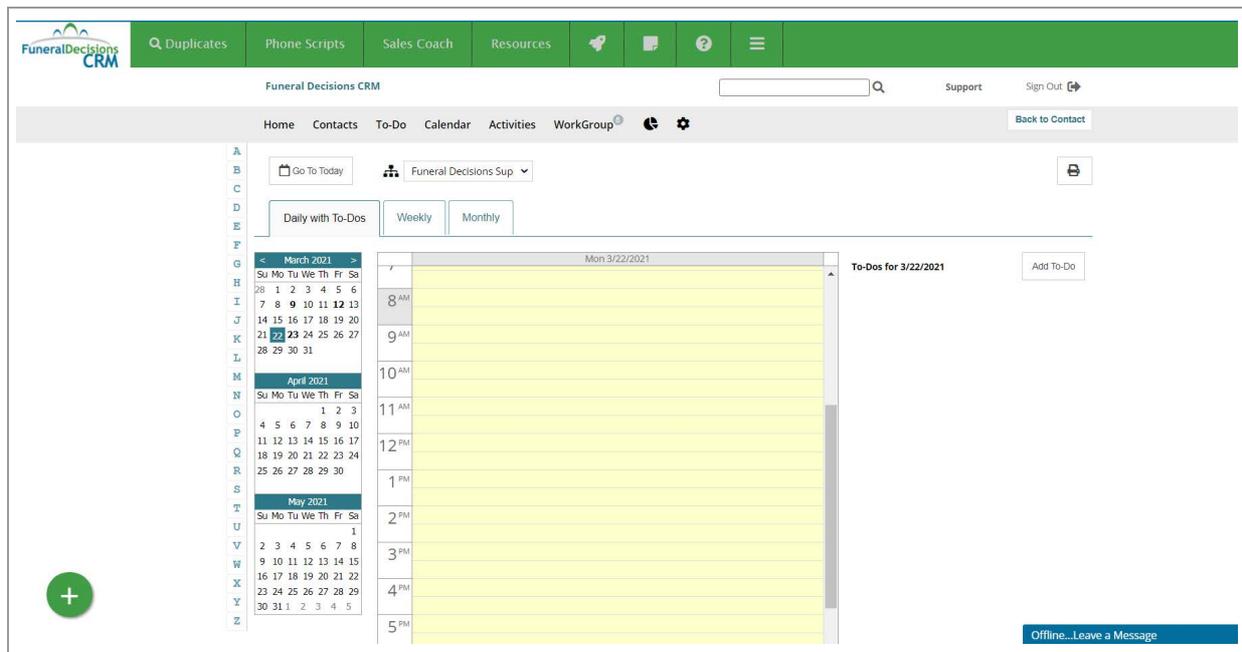


Click on "Calendar" in the "Action Center" or in the gray menu bar.



There are three views in the calendar. Daily with To-Dos, Weekly, or Monthly. Weekly allows you to view time slots as show above. You can also drag and drop the appointment into a different day or time slot by clicking and holding on the left hand edge of the appointment.

# Daily View



The Daily with To-Dos view gives you a complete look into the day, broken up into 30 minute time slots. You can also see your To-Dos for the day on the right hand side, directly next to the calendar.

## Error

*FuneralDecisionsCRM*

Getting an error?

Oops!



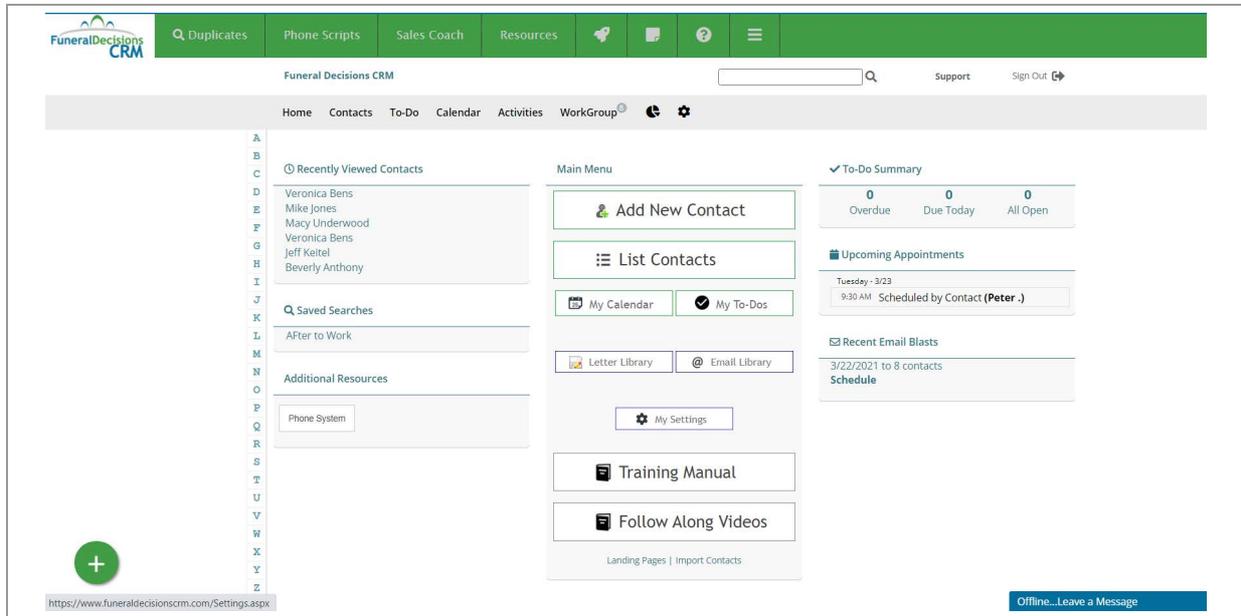
Every now and again you might receive this error in the calendar. For some reason some browsers have issues with being zoomed in or out too much and viewing the calendar. To prevent this from occurring, simply click Ctrl and 0 (zero). This will reset the zoom in your browser and will stop the error from occurring.

# Integrate with Google Calendars

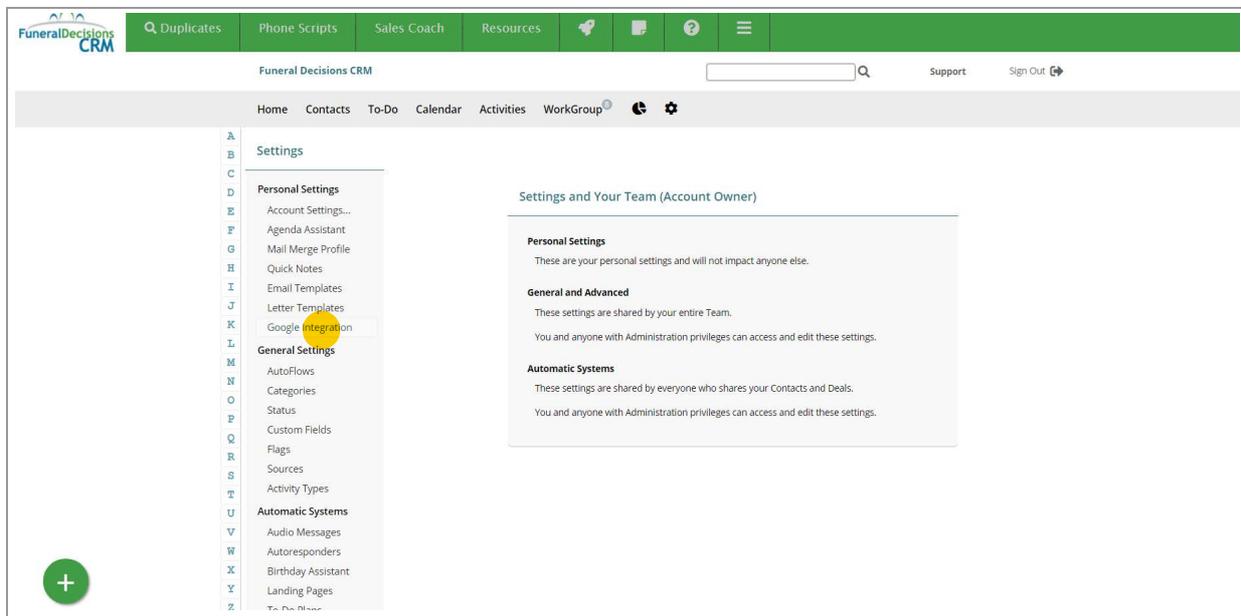
FuneralDecisionsCRM

Integrate your CRM calendar with Google Calendars so that you can see your appointments on your phone, Outlook Calendar or anywhere else.

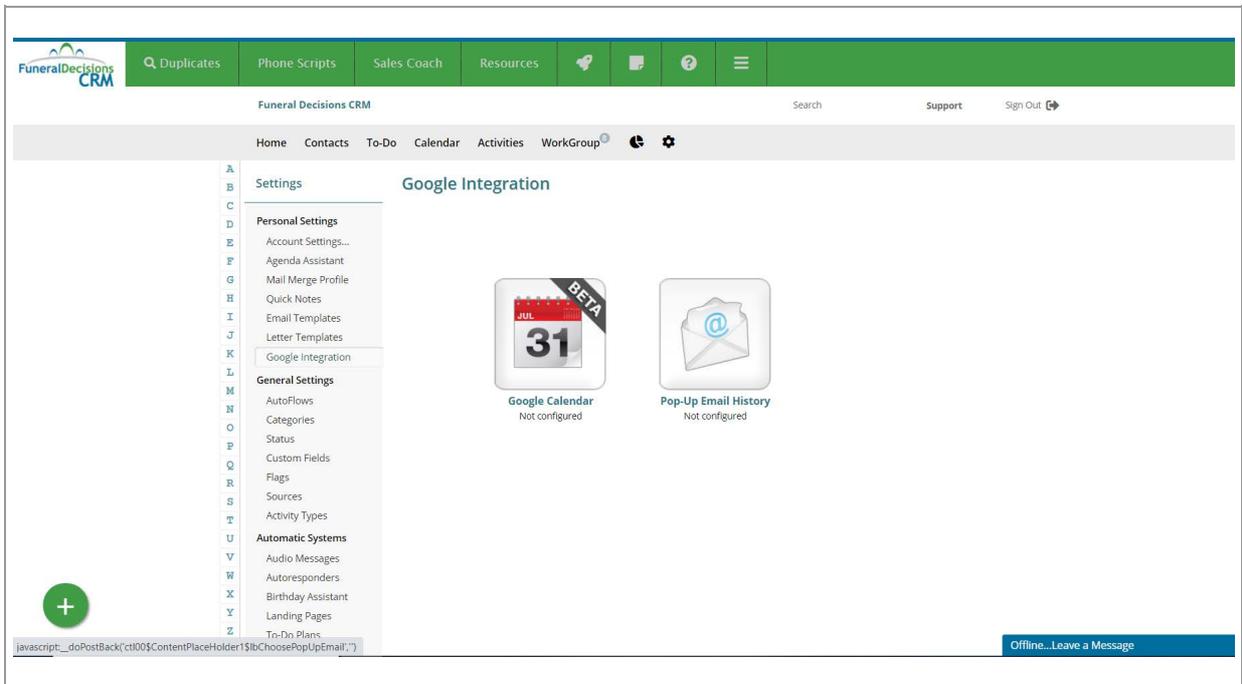
## How to Integrate with Google Calendars



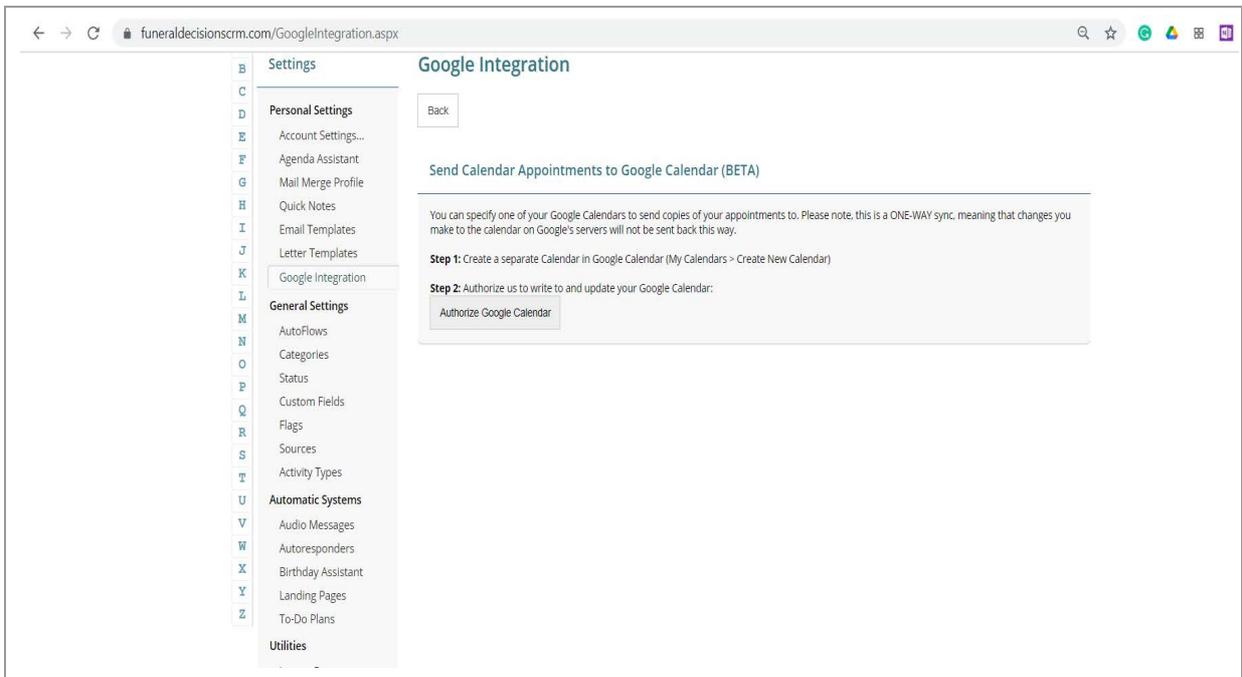
Click on "Settings".



Click on "Google Integration".



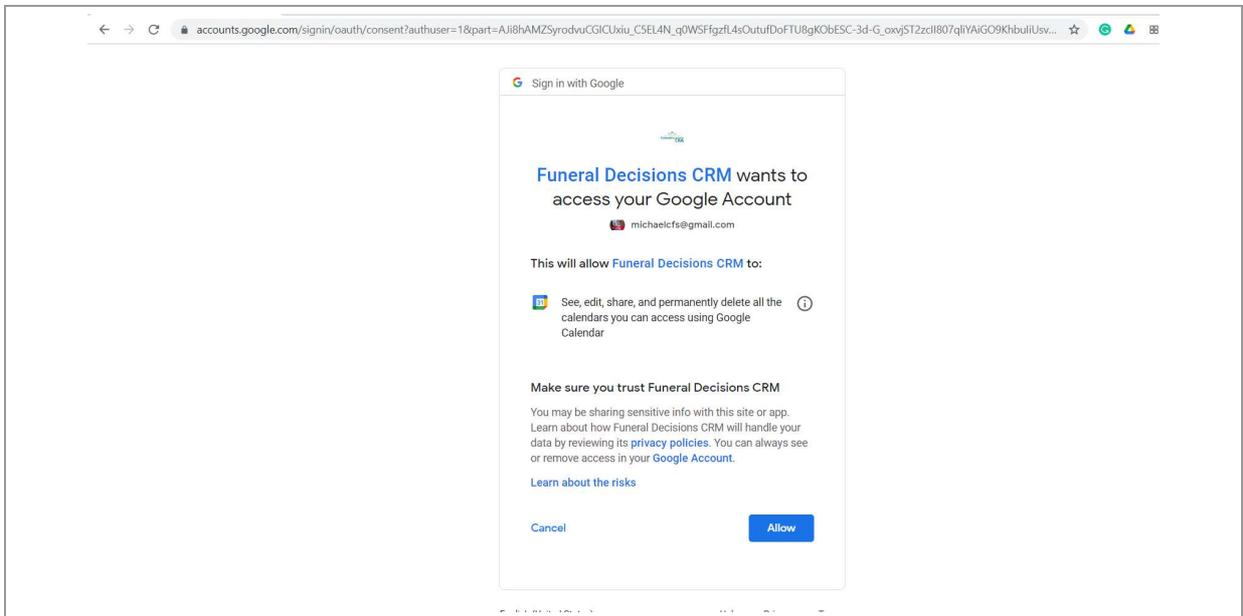
Click on "Google Calendar".



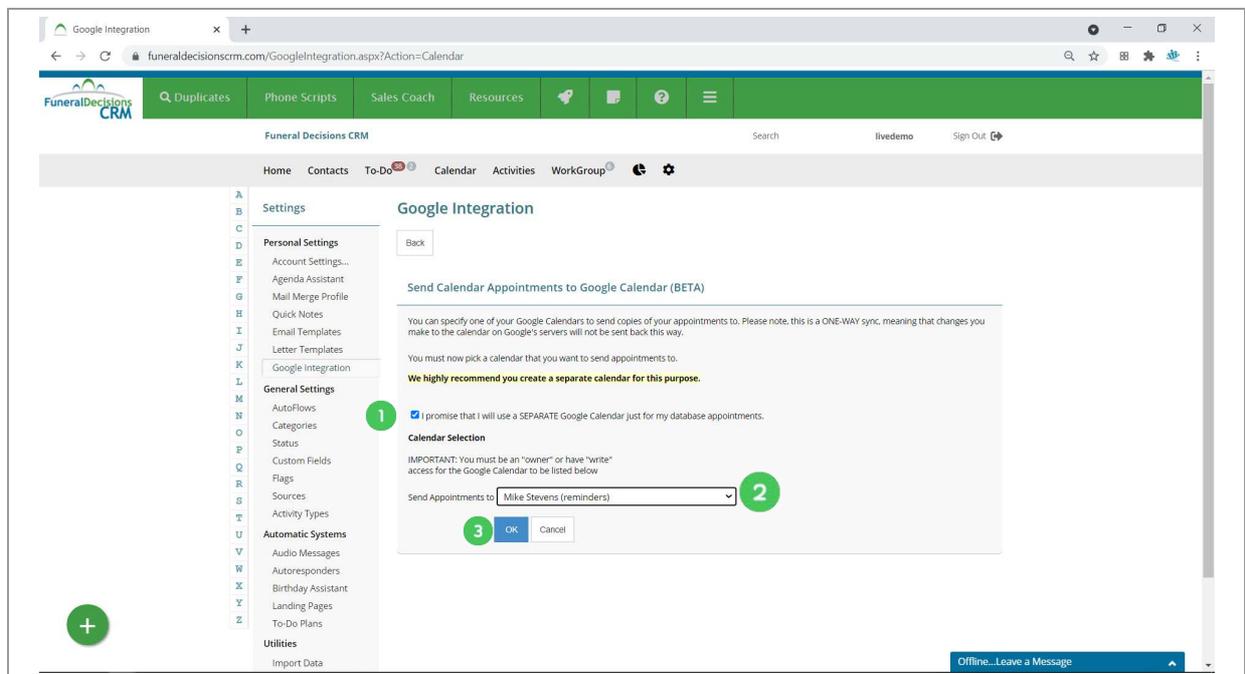
Click on "Authorize Google Calendar"



Select or login to your Google Account.



Click on "Allow" button in "Request for Permission"



- 1.) Click the check box for "I promise that I will use a SEPARATE Google Calendar just for my database appointments".
- 2.) When the drop down menu appears, select the calendar you want to use. If you do not have a separate one, you will need to go into Google and create it.
- 3.) Select Ok. If another popup appears asking you to reconfirm, click "Ok" or "Yes".

...you're now sending all of your appointments to Google.

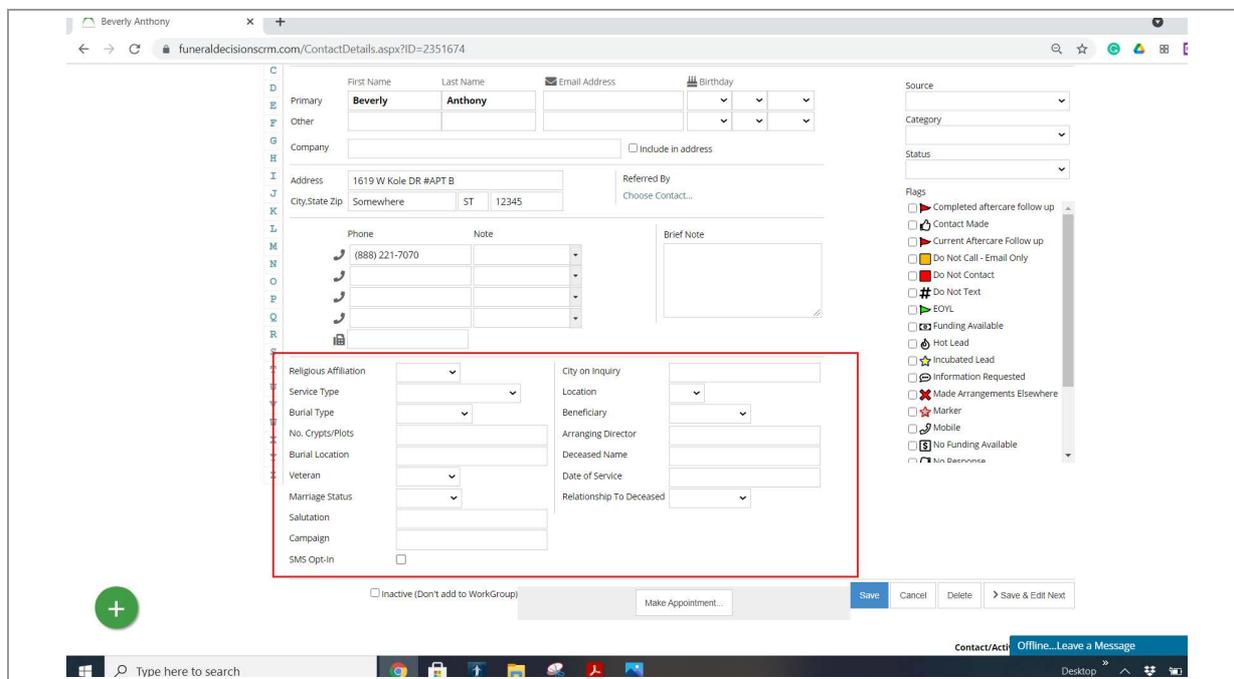
# Customizing The System (Administrator Level Users)

# Customizing The Data Fields

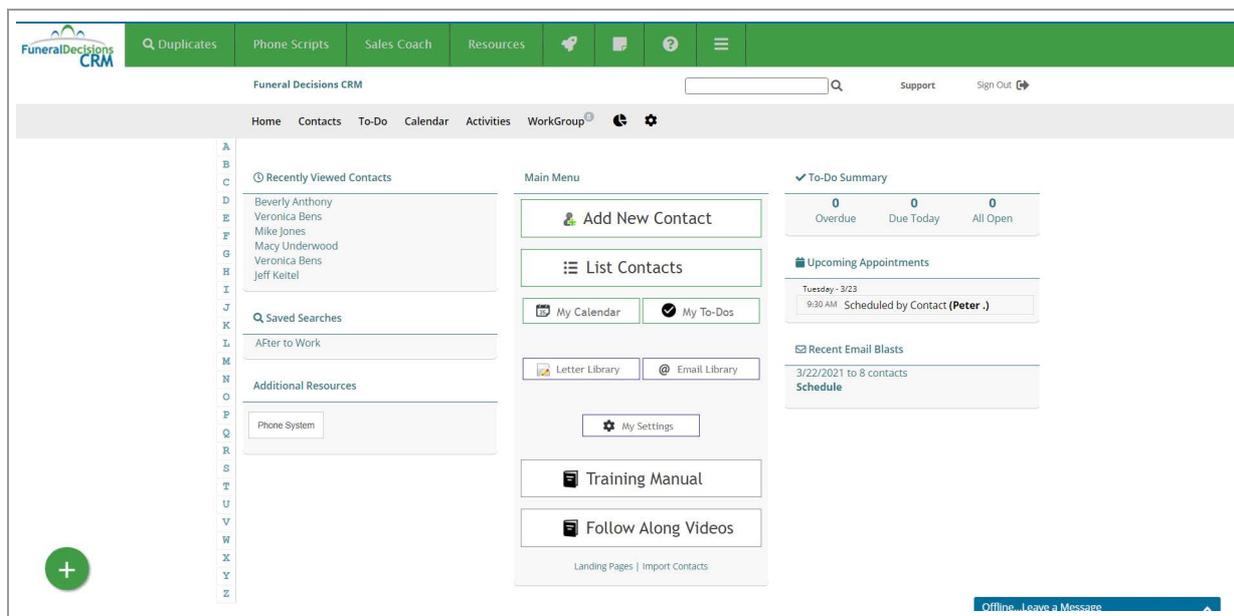
FuneralDecisionsCRM

As an administrator level user, you can customize the fields that show up in the contact record easily.

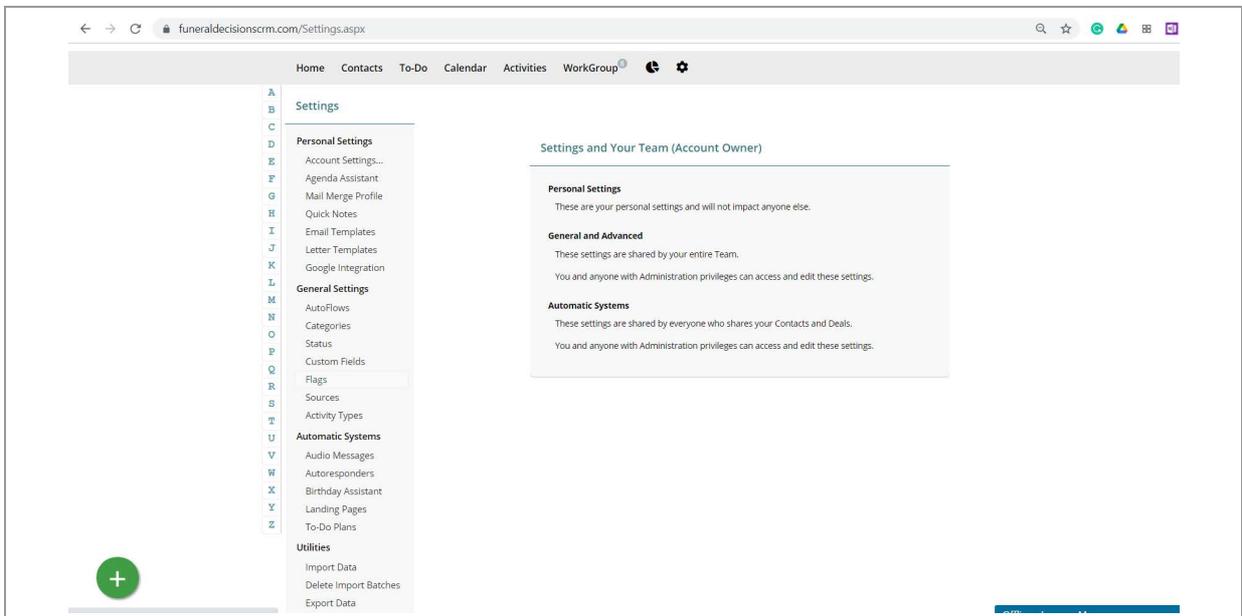
Customize these extra fields...



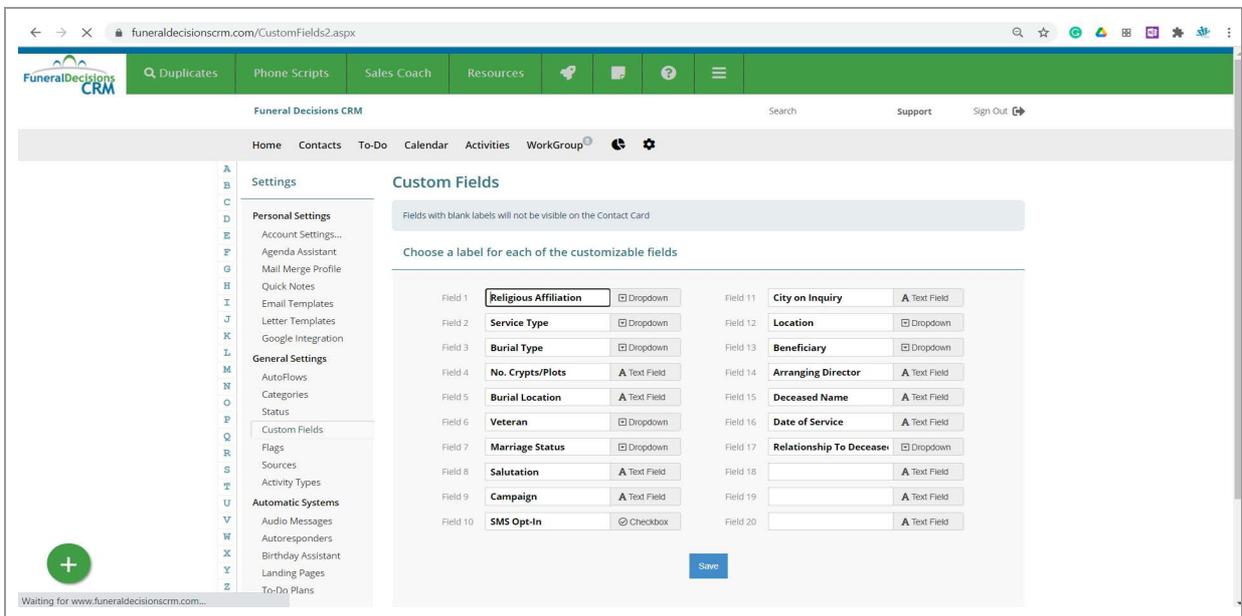
Here we will show you how to customize your system so that you are capturing information that is important to your funeral home/cemetery.



Starting from the "Home" screen...Click on "Settings".



Click on "Custom Fields".



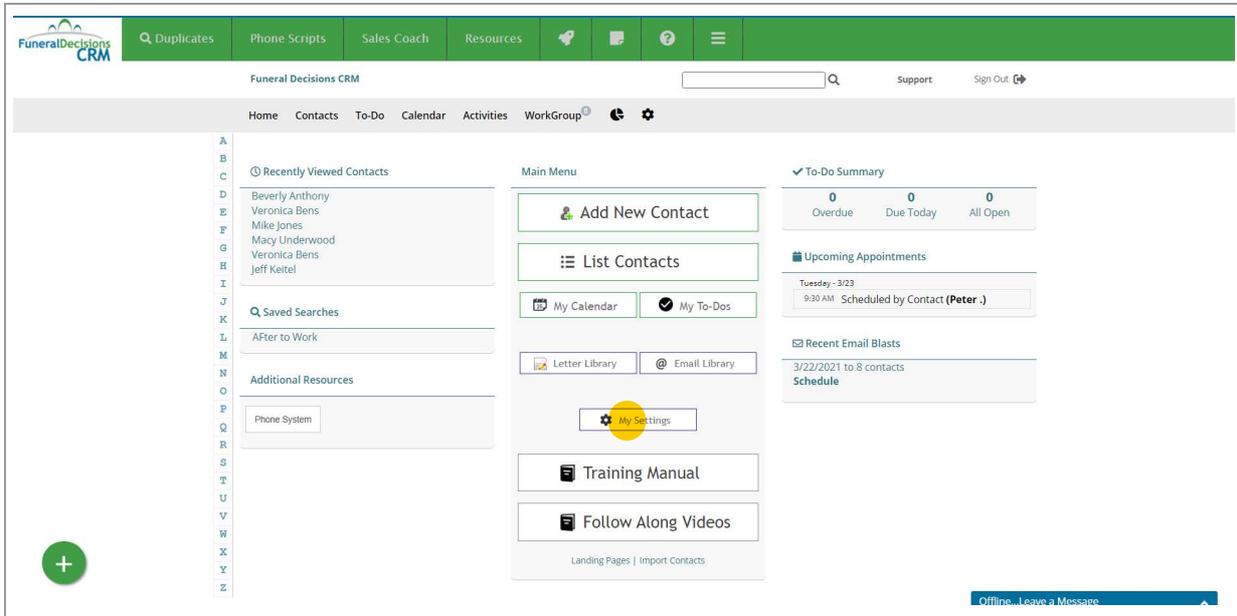
Enter the label for the field that you want to add or remove/edit existing fields. Remember that if you change a field that has existing data in it, the data will not change...there will just be a mismatch between the label and then data type. For Example...Religious Affiliation gets changed to Pet Owner and you have contacts that have Christian, Jewish, etc already there...that data will continue to be there even though it is now called "Pet Owner".

Once done Click on "Save".

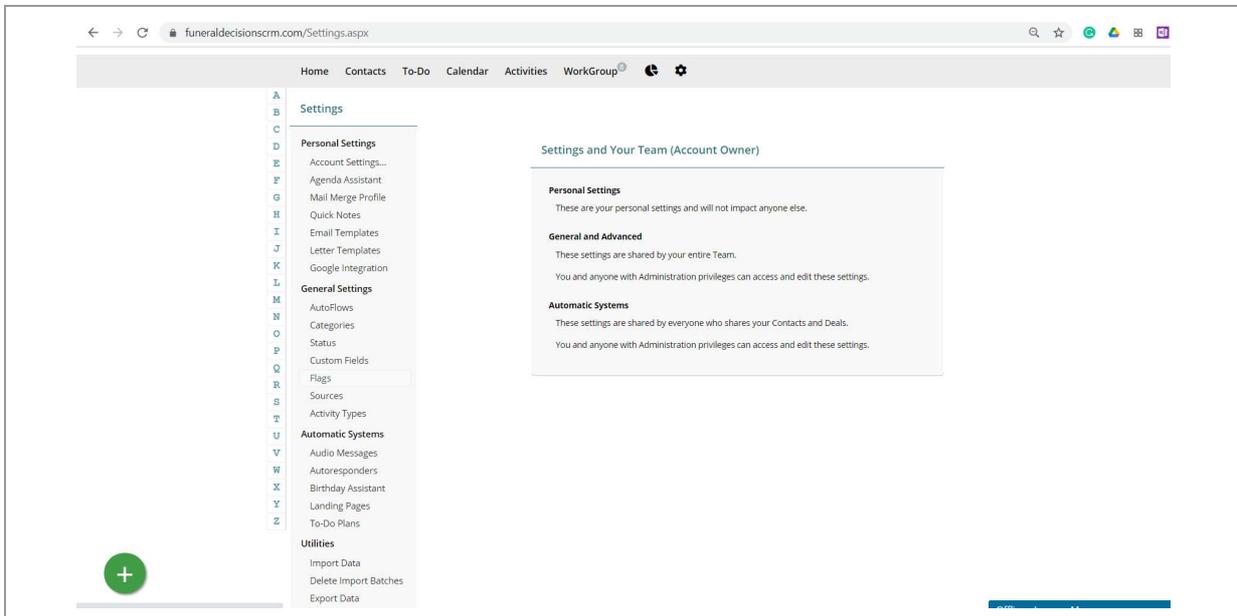
## Adding a Flag

*FuneralDecisionsCRM*

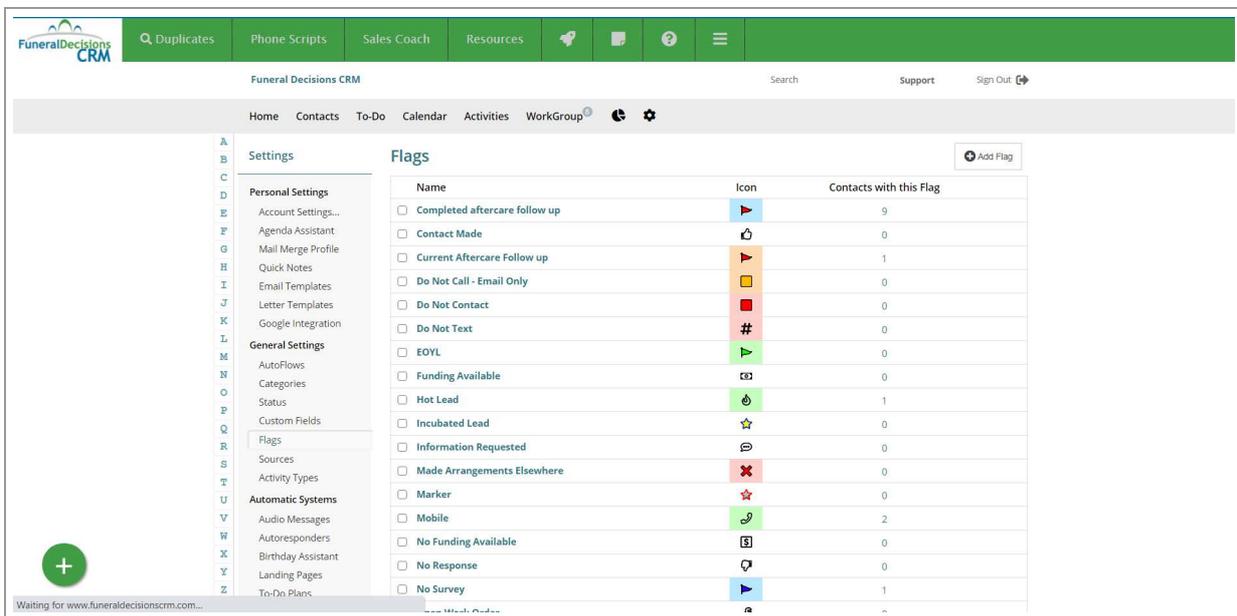
Flags are a great way to tag contacts and assist with filtering.



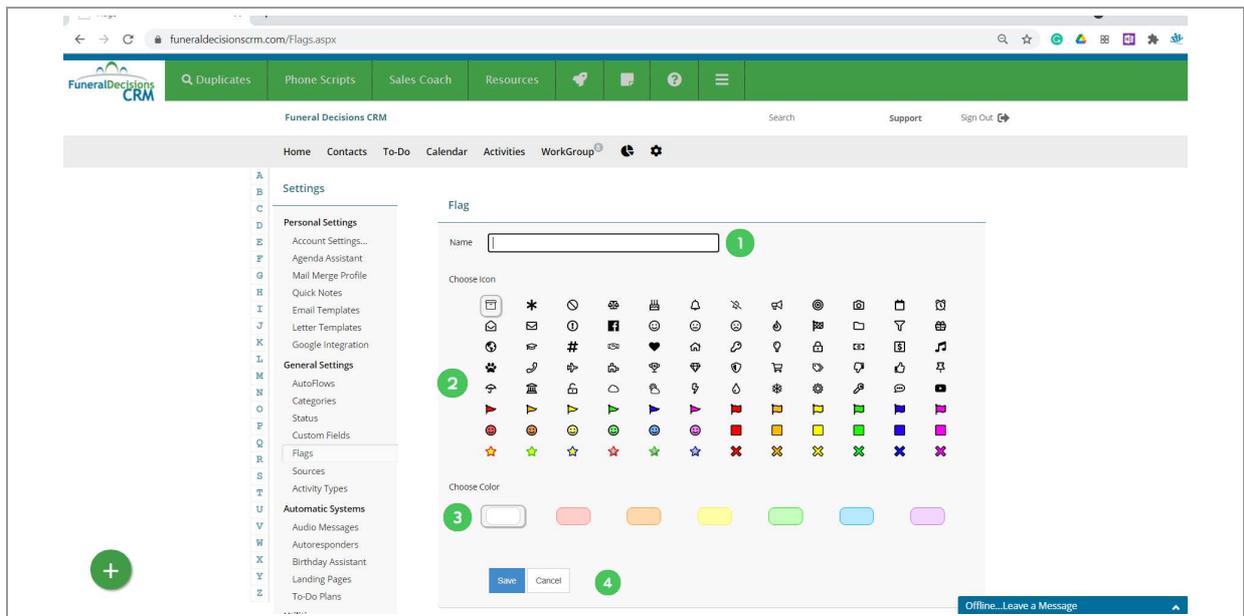
Click on "Settings"



Click on "Flags"



Click on " Add Flag"

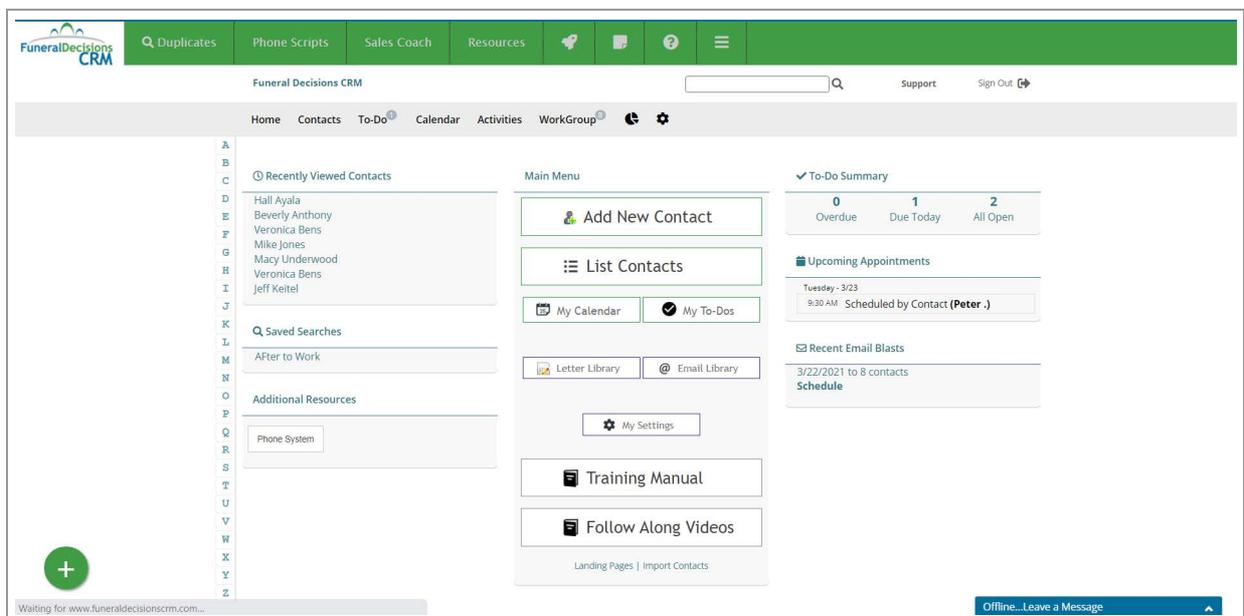


1. Enter the name of your flag
2. Select the flag icon you would like to use
3. Choose the color
4. Click on "Save"

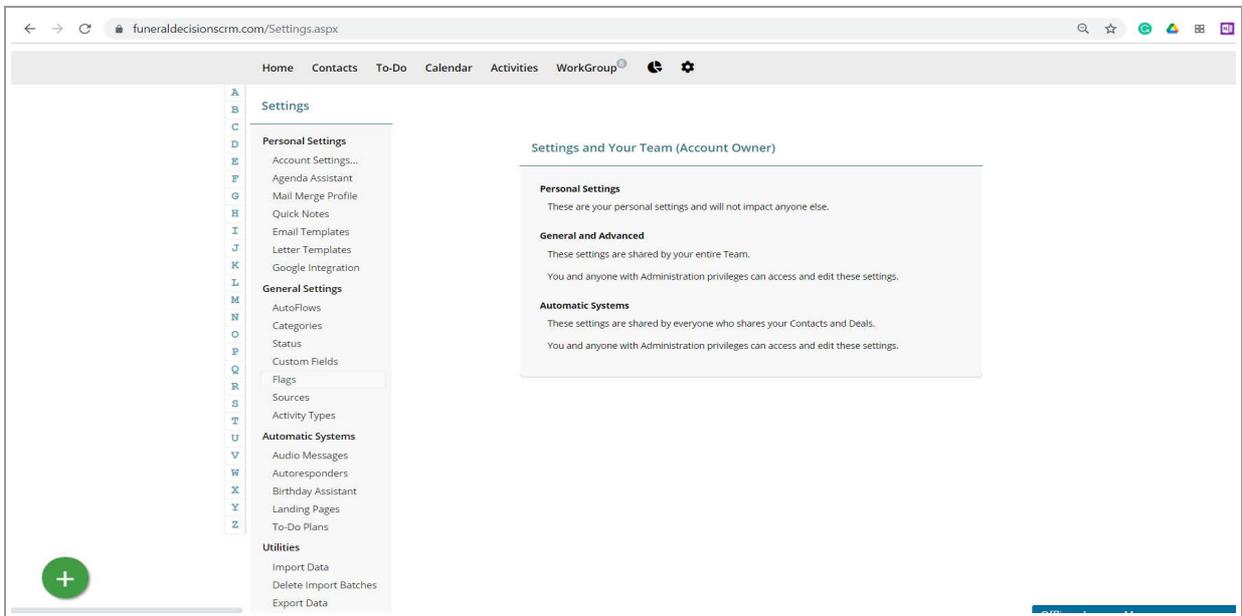
# Add/Edit Sources/Status/Categories

FuneralDecisionsCRM

Add, Edit or Delete Existing Sources, Statuses, or Categories. The process is identical for all three of these. In this example we use Sources, but it would be no different for Status or Category.

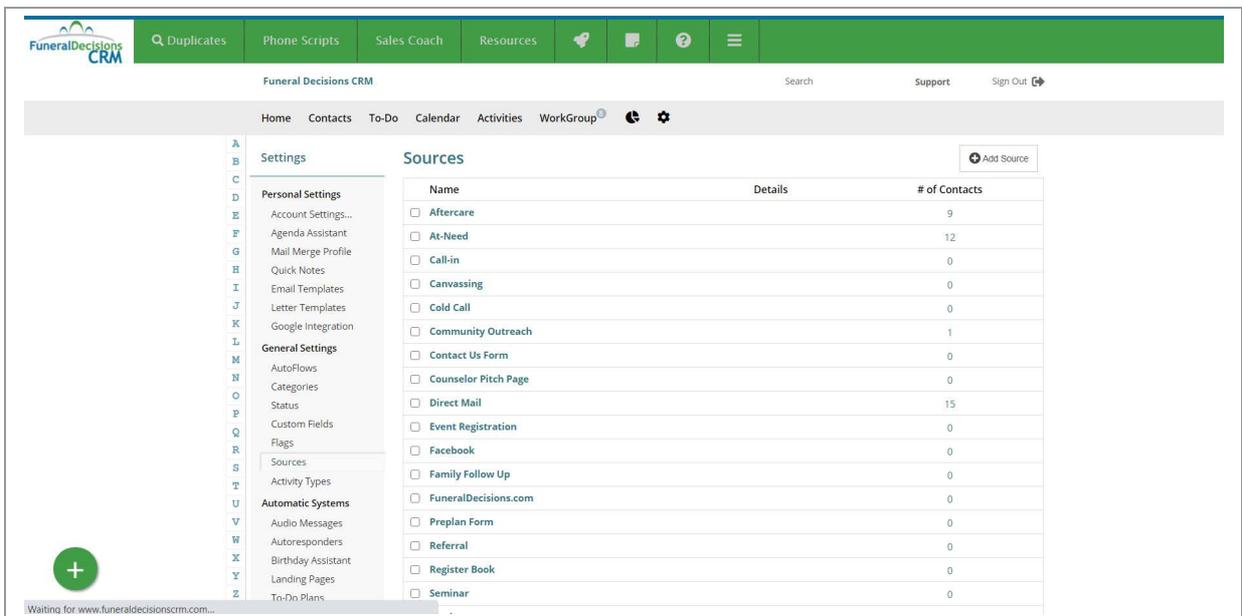


Click on "Settings" edit in "Funeral Decisions CRM"



Click on "Sources" edit in "Settings"

To Add a New Source



Click on " Add Source"

funeraldecisionscrm.com/Sources.aspx

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

Settings

Personal Settings

- Account Settings...
- Agenda Assistant
- Mail Merge Profile
- Quick Notes
- Email Templates
- Letter Templates
- Google Integration

General Settings

- AutoFlows
- Categories
- Status
- Custom Fields
- Flags
- Sources
- Activity Types

Automatic Systems

- Audio Messages
- Autoresponders
- Birthday Assistant
- Landing Pages
- To-Do Plans

Source

1 Name

Details

2 Save Cancel

1. Type in the name of your new Source and (optional) details
2. Click on "Save"

## To Edit The Source

funeraldecisionscrm.com/Sources.aspx

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

Settings

Sources

| Name  | Details | # of Contacts |
|---|---------|---------------|
| <input type="checkbox"/> Aftercare            |         | 9             |
| <input type="checkbox"/> At-Need              |         | 12            |
| <input type="checkbox"/> Call-in              |         | 0             |
| <input type="checkbox"/> Canvassing           |         | 0             |
| <input type="checkbox"/> Cold Call            |         | 0             |
| <input type="checkbox"/> Community Outreach   |         | 1             |
| <input type="checkbox"/> Contact Us Form      |         | 0             |
| <input type="checkbox"/> Counselor Pitch Page |         | 0             |
| <input type="checkbox"/> Direct Mail          |         | 15            |
| <input type="checkbox"/> Event Registration   |         | 0             |
| <input type="checkbox"/> Facebook             |         | 0             |
| <input type="checkbox"/> Family Follow Up     |         | 0             |
| <input type="checkbox"/> FuneralDecisions.com |         | 0             |
| <input type="checkbox"/> Preplan Form         |         | 0             |
| <input type="checkbox"/> Referral             |         | 0             |
| <input type="checkbox"/> Register Book        |         | 0             |
| <input type="checkbox"/> Seminar              |         | 0             |

Offline...Leave a Message

Click on the source name

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

Settings

**Personal Settings**

- Account Settings...
- Agenda Assistant
- Mail Merge Profile
- Quick Notes
- Email Templates
- Letter Templates
- Google Integration

**General Settings**

- AutoFlows
- Categories
- Status
- Custom Fields
- Flags
- Sources
- Activity Types

**Automatic Systems**

- Audio Messages
- Autoresponders
- Birthday Assistant
- Landing Pages
- To-Do Plans

**Source**

1 Name Call-in

Details

2 Save Cancel Delete

1. Change the name and details
2. Click on "Save"

## To Delete An Existing Source

FuneralDecisions CRM

Home Contacts To-Do Calendar Activities WorkGroup

Settings

**Personal Settings**

- Account Settings...
- Agenda Assistant
- Mail Merge Profile
- Quick Notes
- Email Templates
- Letter Templates
- Google Integration

**General Settings**

- AutoFlows
- Categories
- Status
- Custom Fields
- Flags
- Sources
- Activity Types

**Automatic Systems**

- Audio Messages
- Autoresponders
- Birthday Assistant
- Landing Pages
- To-Do Plans

**Utilities**

- Import Data
- Delete Import Batches
- Export Data

| Name  | Details | # of Contacts |
|---|---------|---------------|
| <input type="checkbox"/> Aftercare            |         | 9             |
| <input type="checkbox"/> At-Need              |         | 12            |
| <input type="checkbox"/> Call-in              |         | 0             |
| <input type="checkbox"/> Canvassing           |         | 0             |
| <input checked="" type="checkbox"/> Cold Call |         | 0             |
| <input type="checkbox"/> Community Outreach   |         | 1             |
| <input type="checkbox"/> Contact Us Form      |         | 0             |
| <input type="checkbox"/> Counselor Pitch Page |         | 0             |
| <input type="checkbox"/> Direct Mail          |         | 15            |
| <input type="checkbox"/> Event Registration   |         | 0             |
| <input type="checkbox"/> Facebook             |         | 0             |
| <input type="checkbox"/> Family Follow Up     |         | 0             |
| <input type="checkbox"/> FuneralDecisions.com |         | 0             |
| <input type="checkbox"/> Preplan Form         |         | 0             |
| <input type="checkbox"/> Referral             |         | 0             |
| <input type="checkbox"/> Register Book        |         | 0             |
| <input type="checkbox"/> Seminar              |         | 0             |
| <input type="checkbox"/> Seminars             |         | 6             |
| <input type="checkbox"/> Walk-in              |         | 0             |
| <input type="checkbox"/> Website              |         | 0             |

Select: All | None  Delete Selected Sources

2

Contact/Activity ID: Offline... Leave a Message

1. Check the box next to the source you wish to delete
2. Click on " Delete Selected Sources "

To-Do Plans (Administrator/Power  
User Level Users)

# About To-Do Plans

FuneralDecisionsCRM

To-Do plans were known as 'marketing paths' in other older systems. FuneralDecisionsCRM gives you complete control over these paths.

## What are To-Do Plans...

### To-Do Plan

Name

2 Steps in this To-Do Plan

| Step # | Summary | Schedule |            | Assigned To   |
|--------|---------|----------|------------|---------------|
| 1      | call    | 1D       | Phone Call | Contact Owner |
| 2      | letter  | 5D       | Letter     | Contact Owner |

Items scheduled for "0 Days" will be scheduled on the To-Do Plan's starting date. "1 Day" is the day after the starting date and "-1 Day" is the day before the starting date.

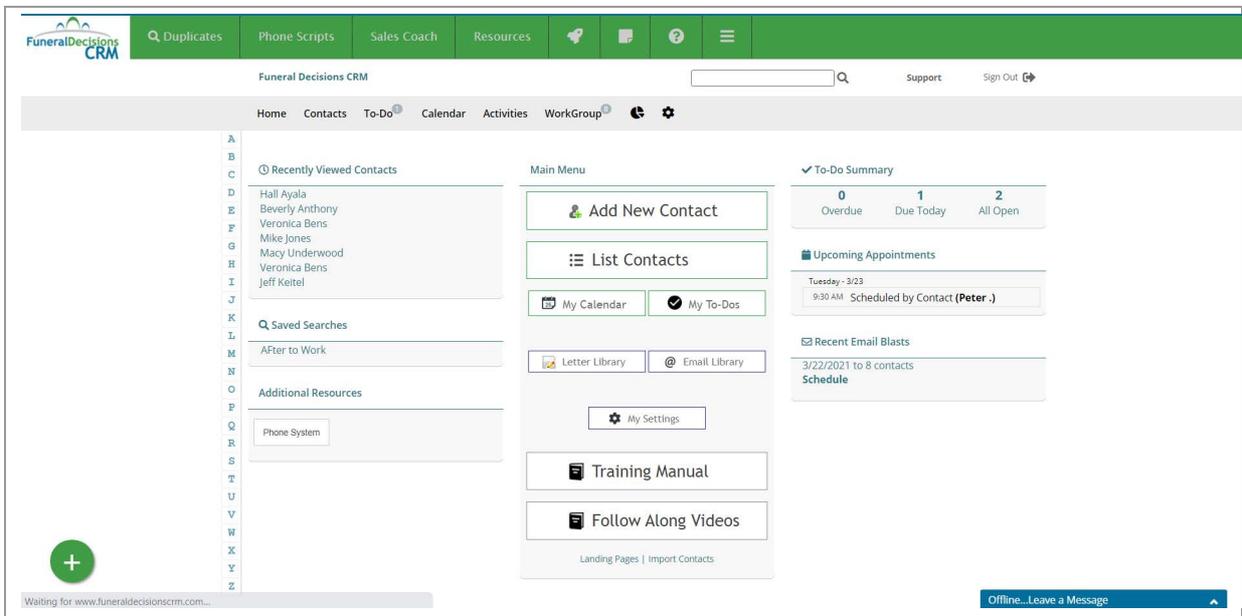
All scheduled days are from the starting date, not from the previous item completed.

To-Do plans are essentially the same thing as 'marketing paths' from other systems. To-Do plans in FuneralDecisionsCRM are predefined follow up activities that take place within certain intervals. Unlike other systems however, FuneralDecisionsCRM allows you to create your own To-Do plans or paths and they can be any combination of letters, emails, phone calls or anything else you'd like. You are in complete control of the follow up procedure.

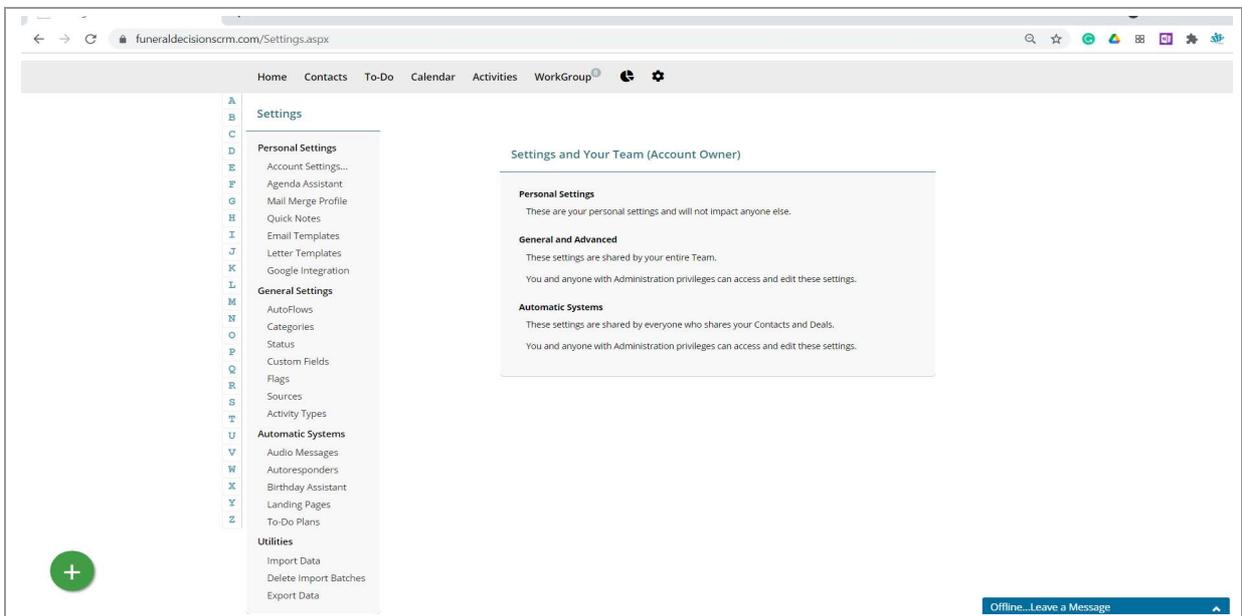
## Build a To-Do Plan

FuneralDecisionsCRM

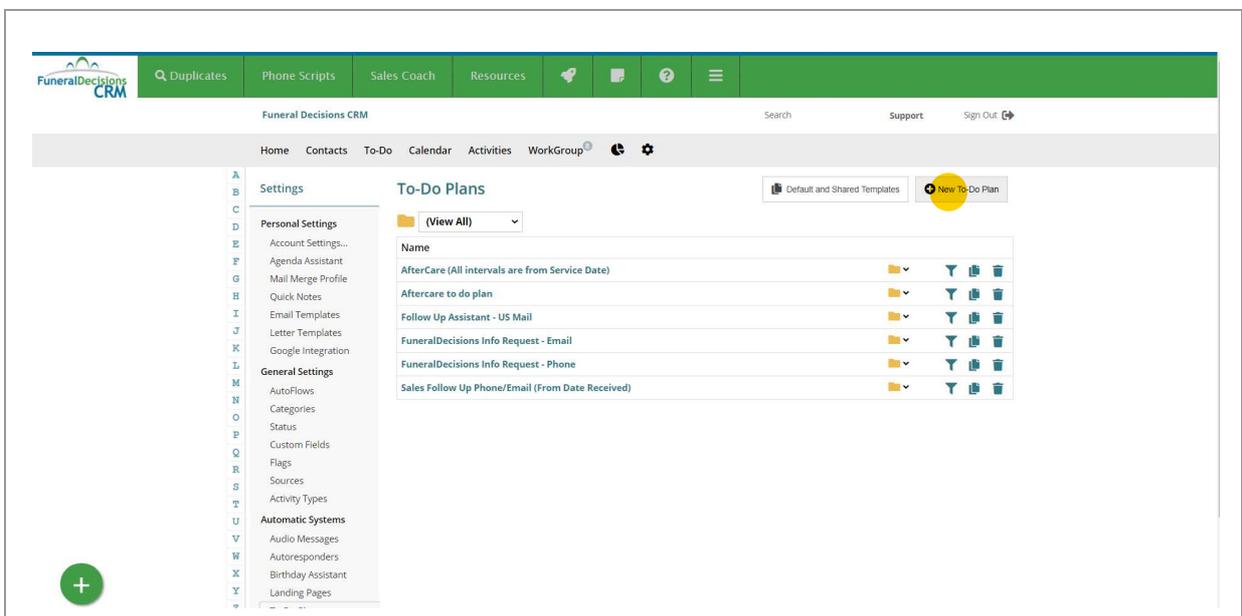
Build a custom To-Do plan



Click on "Settings"



Click on "To-Do Plans"



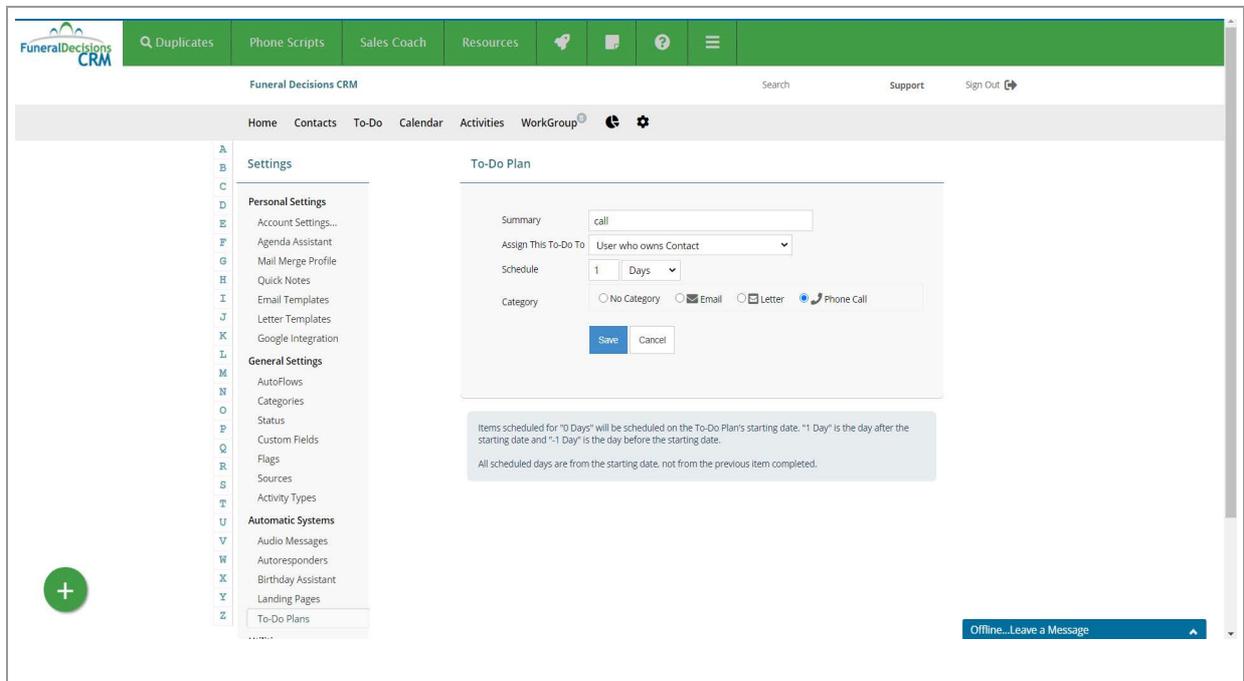
Click on " New To-Do Plan "

The screenshot shows the FuneralDecisions CRM interface. The top navigation bar includes 'FuneralDecisions CRM', 'Duplicates', 'Phone Scripts', 'Sales Coach', 'Resources', and utility icons. The main navigation bar shows 'Home', 'Contacts', 'To-Do', 'Calendar', 'Activities', and 'WorkGroup'. The left sidebar lists settings categories: Personal Settings, General Settings, and Automatic Systems. The 'To-Do Plans' option is selected. The main content area displays the 'To-Do Plan' configuration for 'follow up'. It shows 'No Steps in this To-Do Plan' and an 'Add a Step' button. The 'Save' button is highlighted with a yellow circle. A 'Delete' button is also visible. A help text box explains scheduling rules for '0 Days' and '-1 Day'.

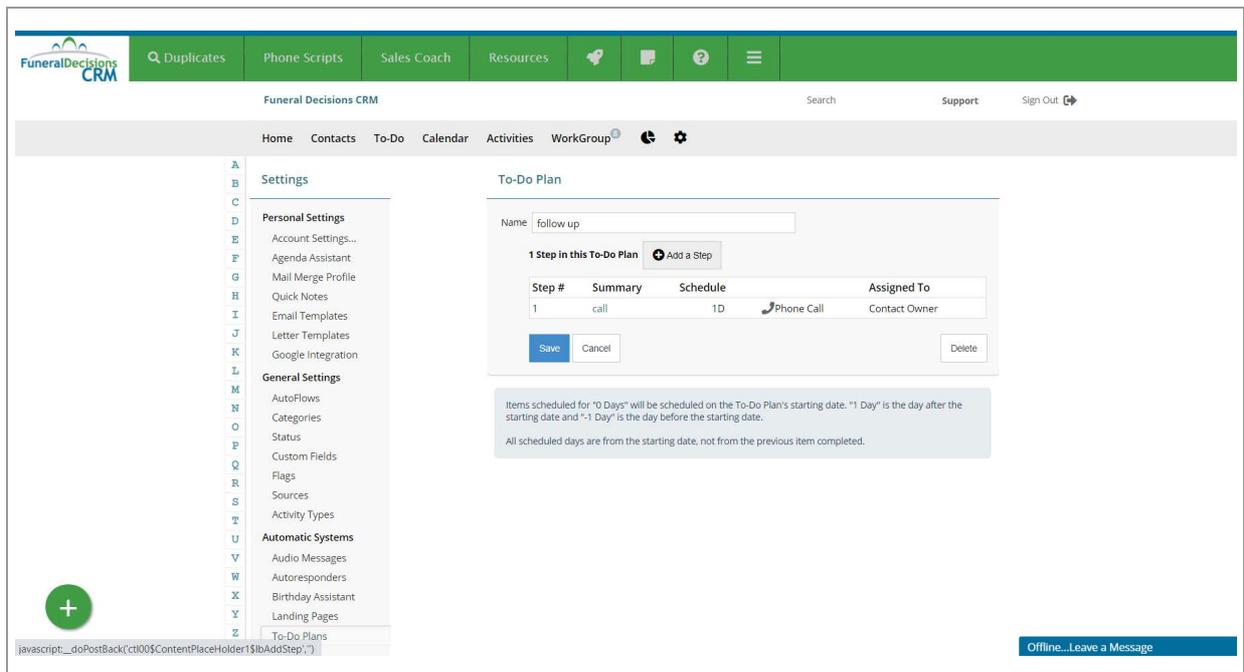
Type the name of your To-Do Plan and click "Save"

This screenshot is identical to the previous one, showing the 'To-Do Plan' settings page. The 'Name' field now contains 'Follow up'. The 'Add a Step' button is highlighted with a yellow circle, and the 'Save' button is also highlighted with a yellow circle. The rest of the interface remains the same.

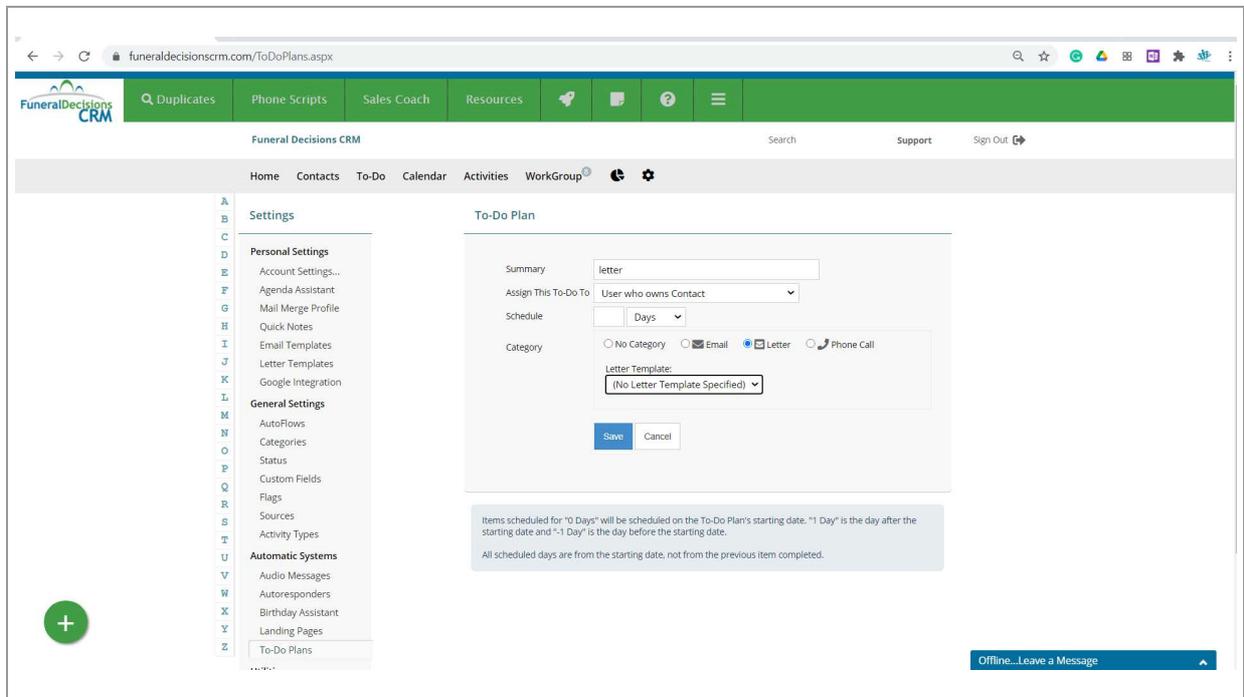
Now add a step by clicking the "Add a Step" button.



Enter in the Summary, the day from when the To-Do plan is assigned that this step should take place, the category (and if an email or letter, you can select the template if needed), and then click "Save".

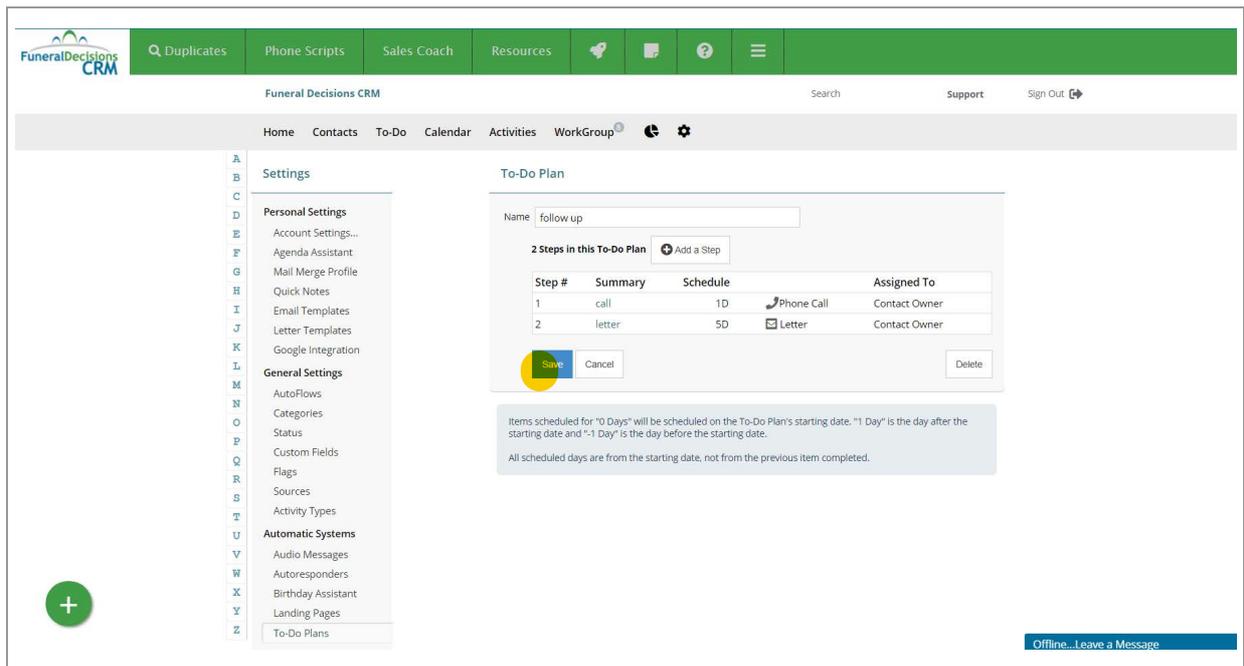


Click "Add a Step" to add an additional step if needed. To-Do Plans can be a single step if you wish.



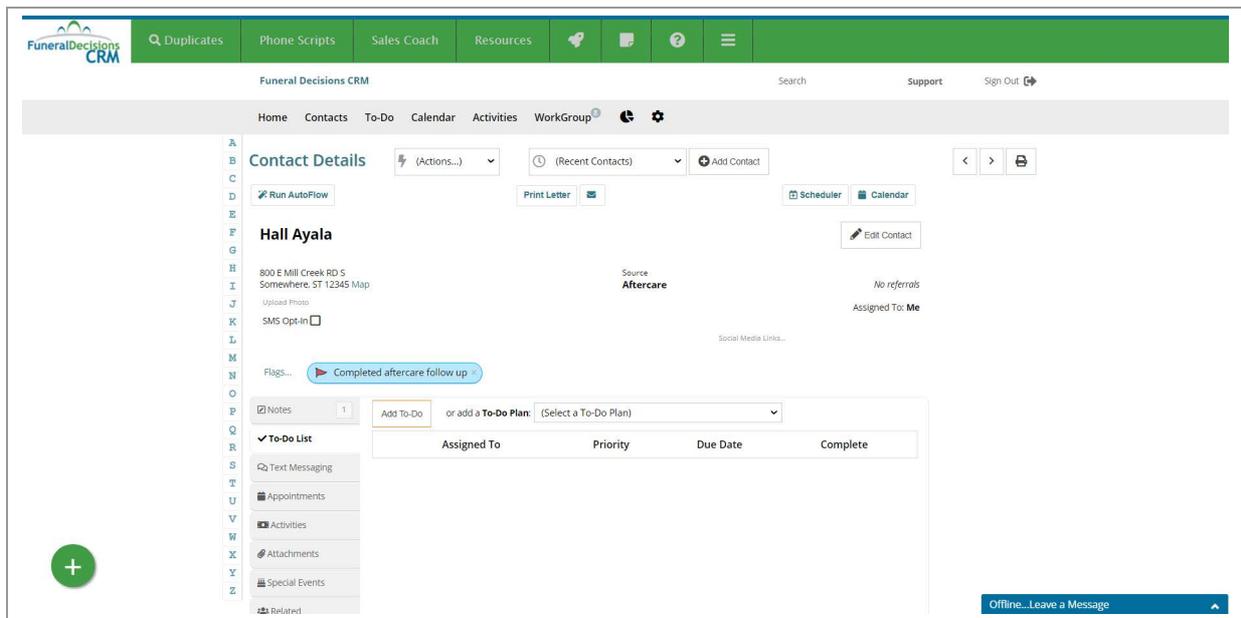
Fill out the information for the next step and click "Save".

IMPORTANT: All scheduled days are from the starting date, not from the previous item completed. So item two will be 5 days from the starting date, not the previous step.

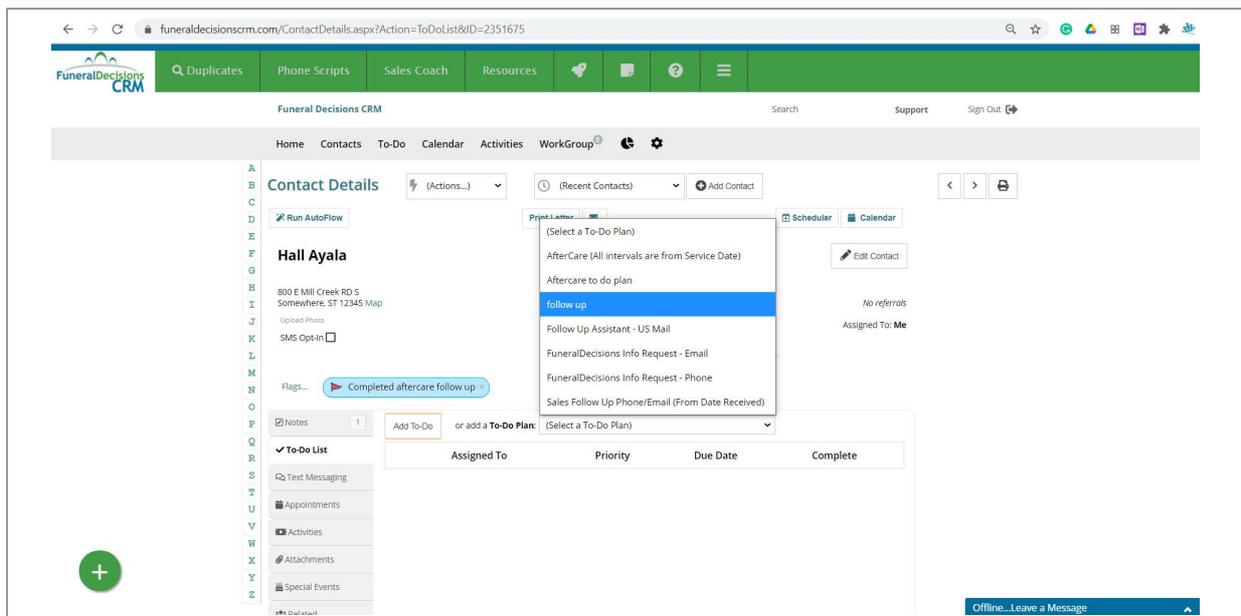


Add as many steps as needed and click "Save"

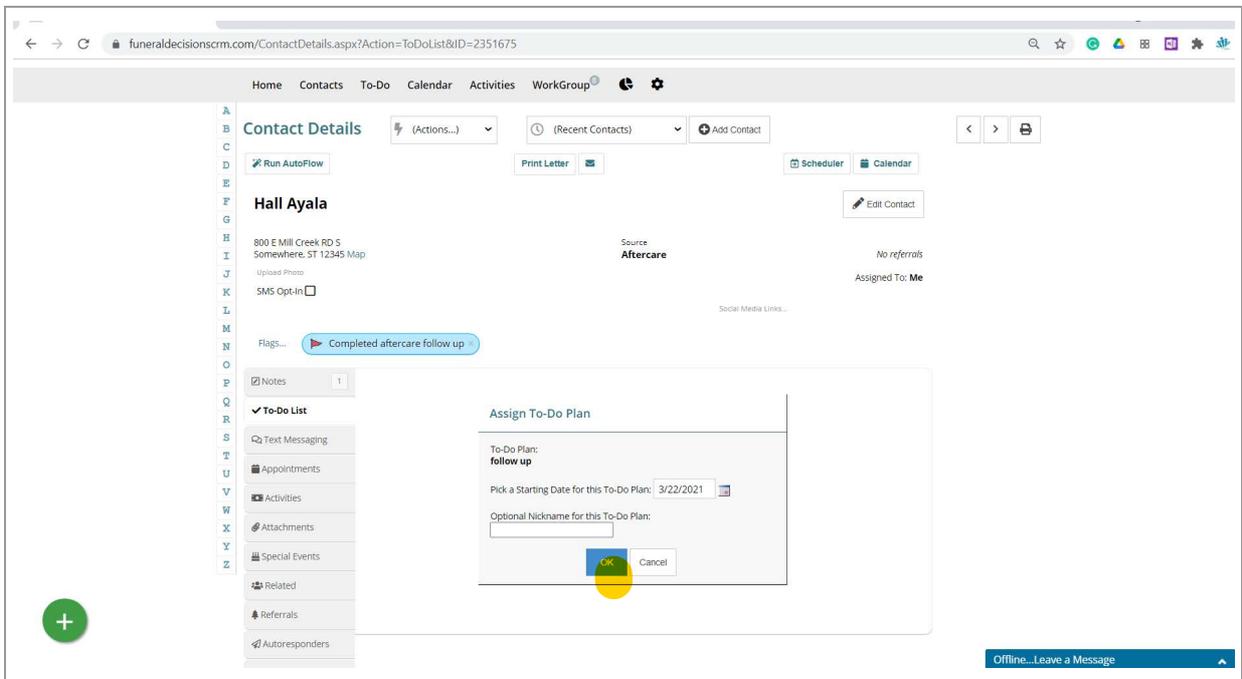
# To Launch the To-Do Plan for a Single Contact



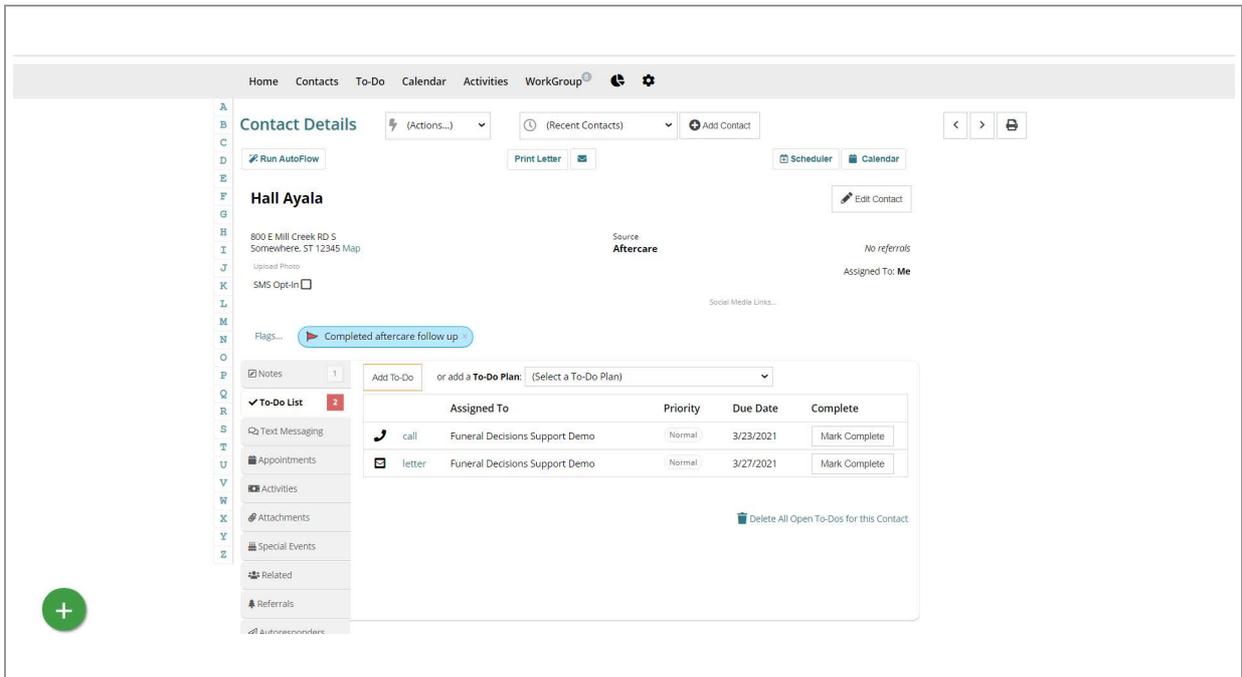
1. Go to the contact record, click on the "To-Do List" tab on the left side underneath "Notes"
2. Click the drop down menu titled "Select a To-Do Plan"



Select the To-Do Plan you wish to put the contact on.



Select the date and click "Ok". With To-Do plans you can post date or use a future date, it does not have to be the current day.

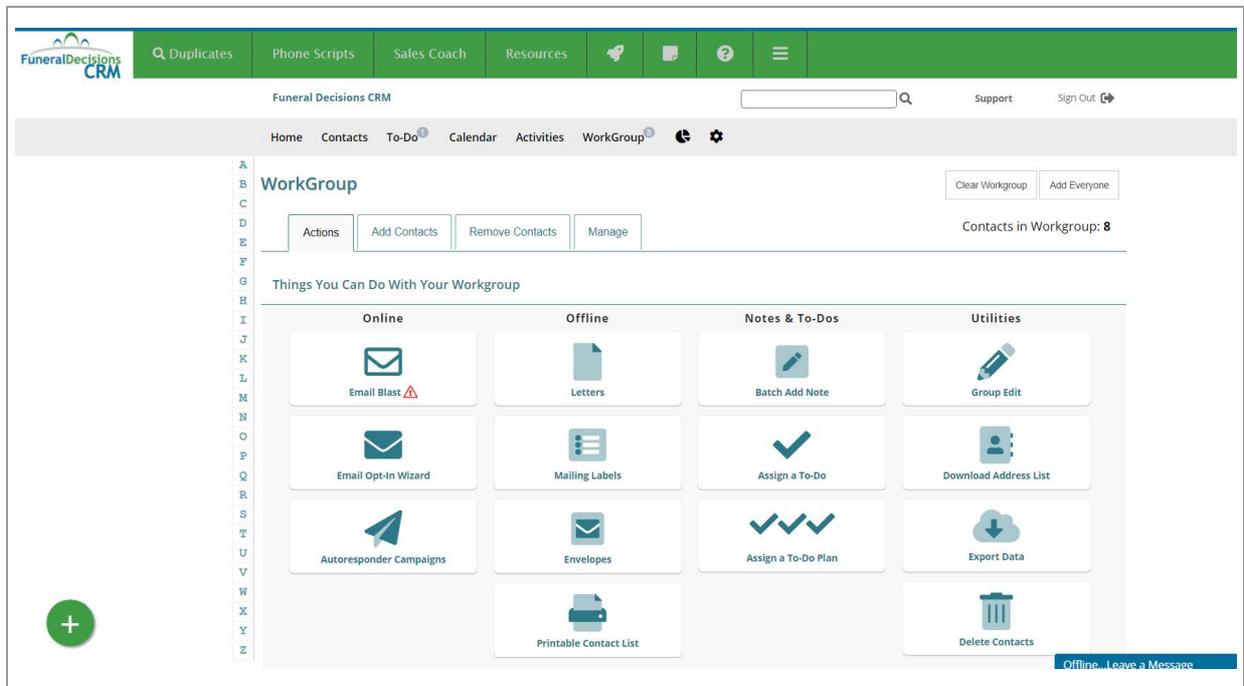


You will know see the plan steps show up in the to-do list with the predetermined intervals.

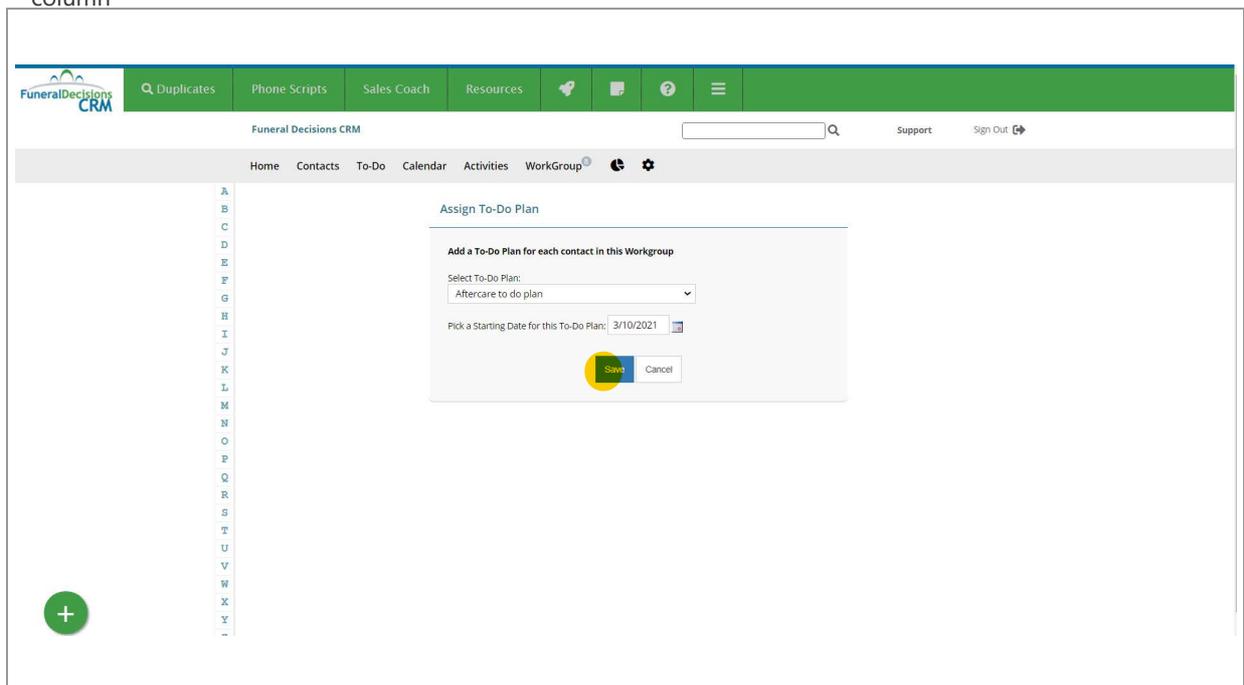
## Launch a To-Do Plan for a Group of Contacts

*FuneralDecisionsCRM*

Add a To-Do Plan to a group of contacts.



1. Filter for your contacts and add them to Work Group
2. Click on the "Assign a To-Do Plan" button under the "Notes & To-Dos" column



Select the To-Do plan you wish to add and the starting date, then click "Save".

# Landing Pages

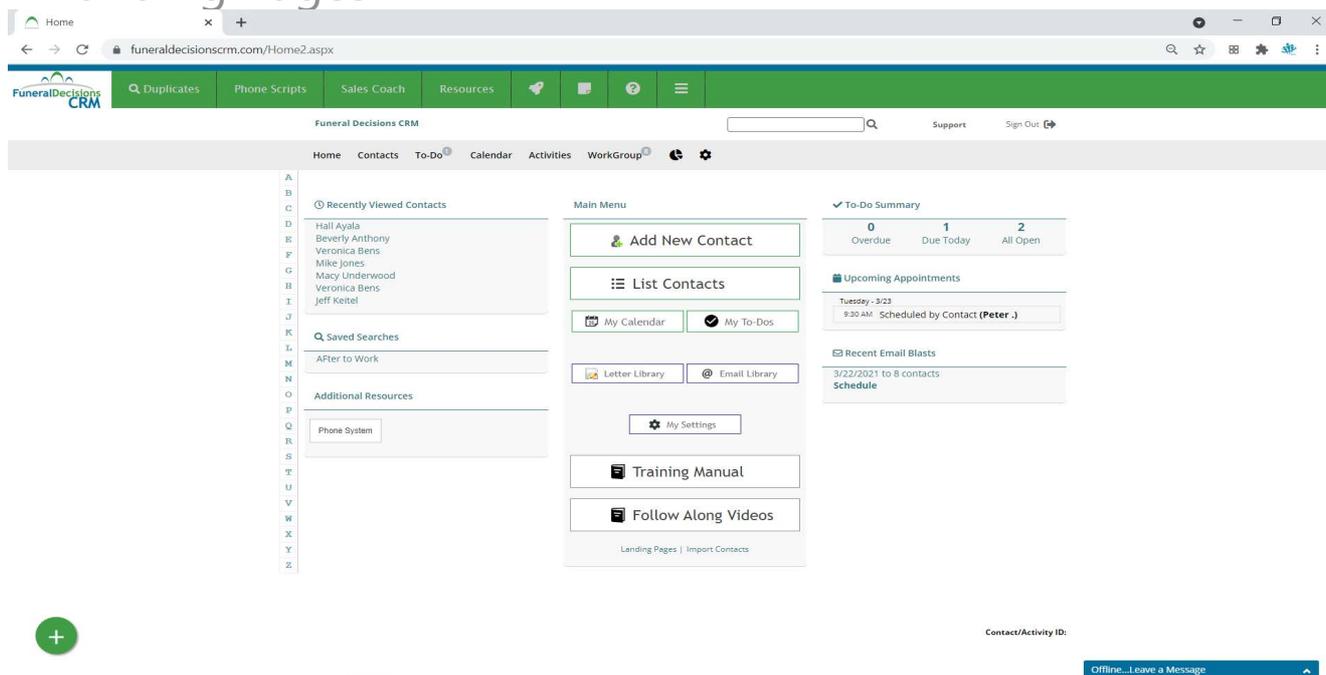
# About Landing Pages

FuneralDecisionsCRM

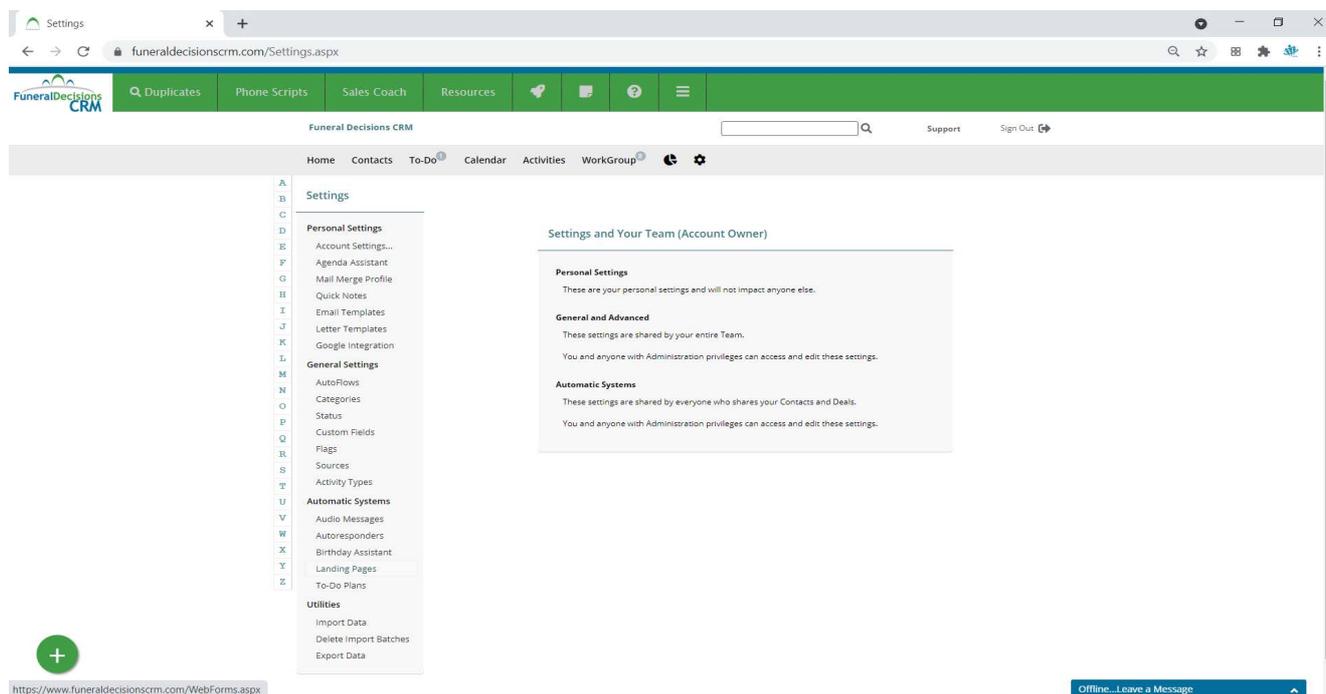
Landing pages are here for two main things. The first is the ability to create a webpage based around a marketing activity. A perfect example would be a seminar that you are having and would like to provide information about it to individuals, but you don't have the ability to edit your existing website.

The second use for landing pages is the ability to integrate the CRM with your website, Facebook page, or any other digital marketing channel you might be using.

## Landing Pages



First Click on Settings



Next click on the Landing page

# Landing Pages

The screenshot shows the 'Landing Pages' management screen in the Funeral Decisions CRM. At the top, there is a navigation bar with 'Home', 'Contacts', 'To-Do', 'Calendar', 'Activities', and 'WorkGroup'. Below this is a search bar and 'Support' and 'Sign Out' links. The main content area is titled 'Landing Pages' and features a '+ Create New Landing Page' button. A table lists existing landing pages with columns for Name, Edit Date, and Leads. The table contains the following entries:

| Name                               | Edit Date | Leads |
|------------------------------------|-----------|-------|
| Mobile-Specific Form (Responsive)1 | 3/23/2021 | 0     |
| 1                                  | 3/23/2021 | 0     |
| Responsive Page                    | 3/23/2021 | 0     |
| Appointment Setting                | 3/23/2021 | 0     |
| Test                               | 3/18/2021 | 4     |
| Moloneyfh.com                      | 3/18/2021 | 0     |
| Jan 2021 Thank you page            | 1/26/2021 | 0     |
| Example Page                       | 1/26/2021 | 0     |

Click on the Create Landing Page

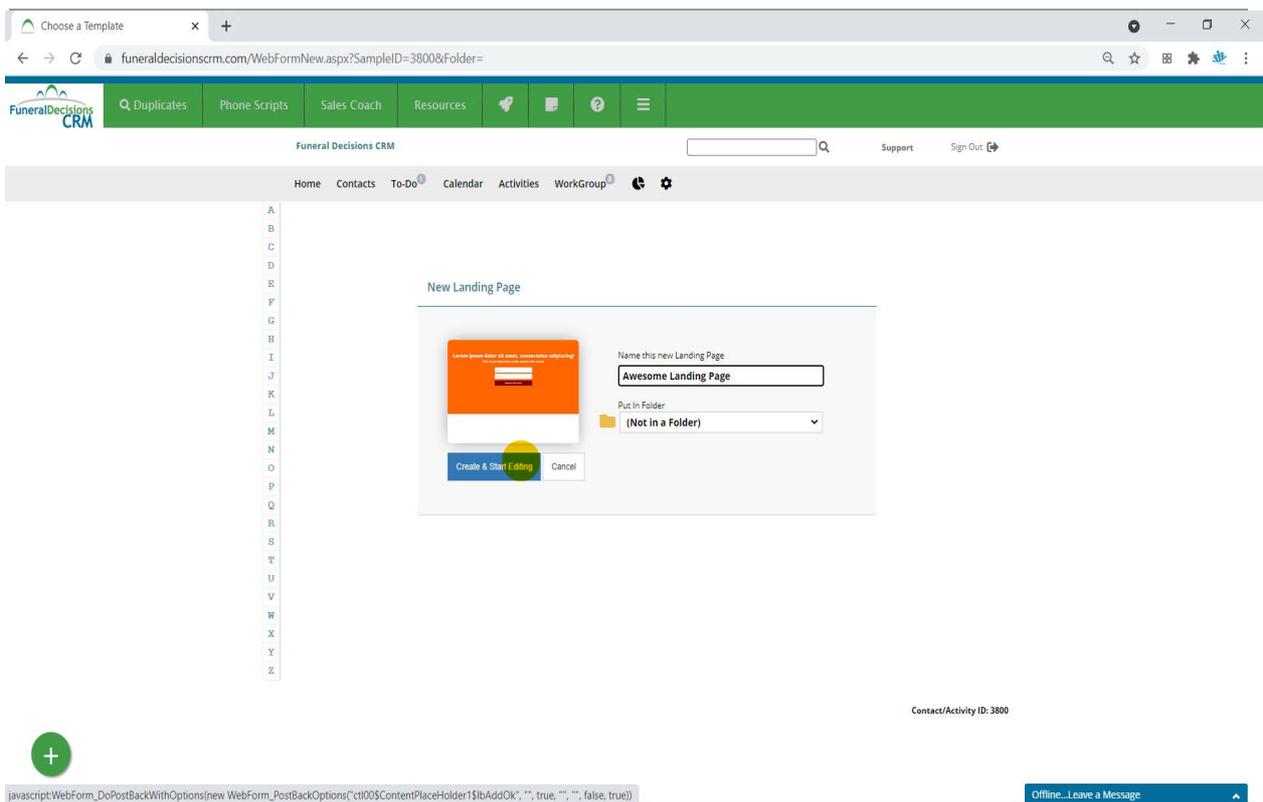
The screenshot shows the 'Choose a Template' dialog box. It is titled 'New Landing Page' and contains a 'Filter (View All)' dropdown. Below the filter, there are several template cards to choose from:

- Counselor Pitch Page
- Mobile-Specific Form (Responsive)
- Offer Landing Page
- Register Book
- Responsive Page
- Thank You Page
- Classic / Legacy Landing Page

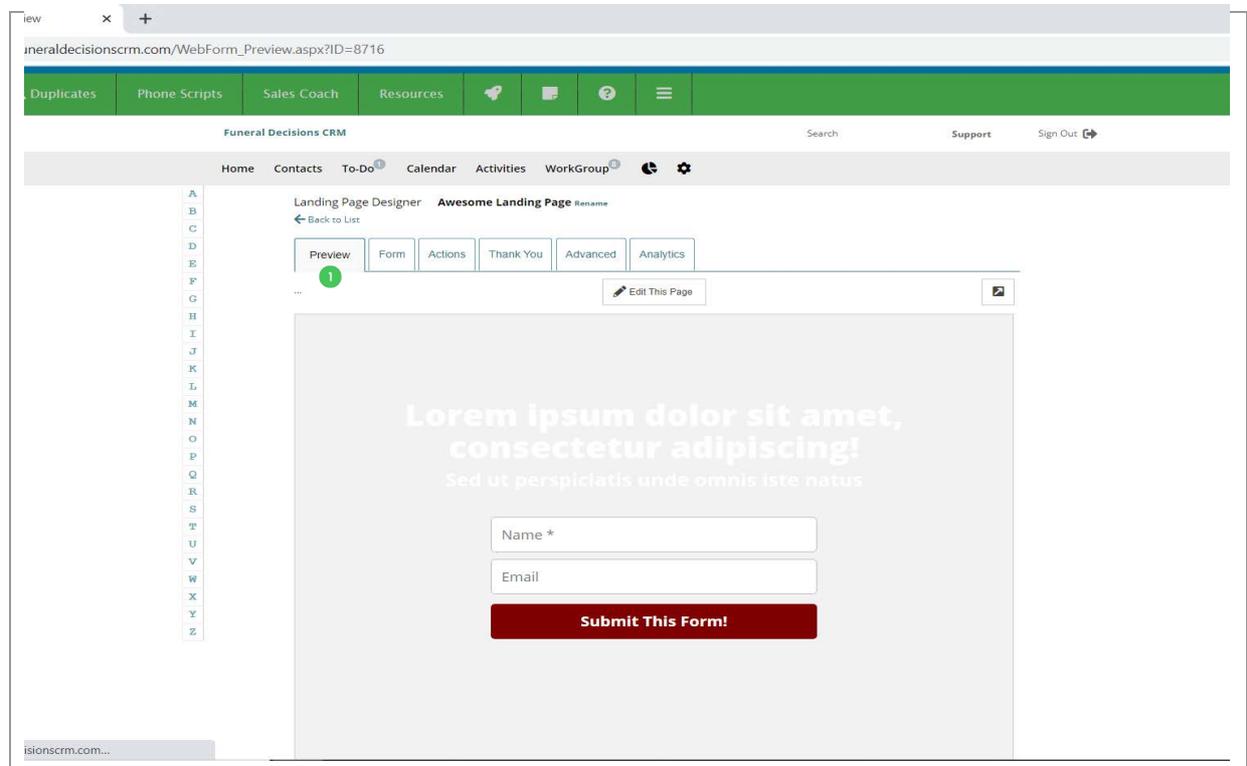
A 'Cancel' button is located at the bottom of the dialog. The background shows the CRM interface with a search bar and 'Support' and 'Sign Out' links.

Select a Template to start from

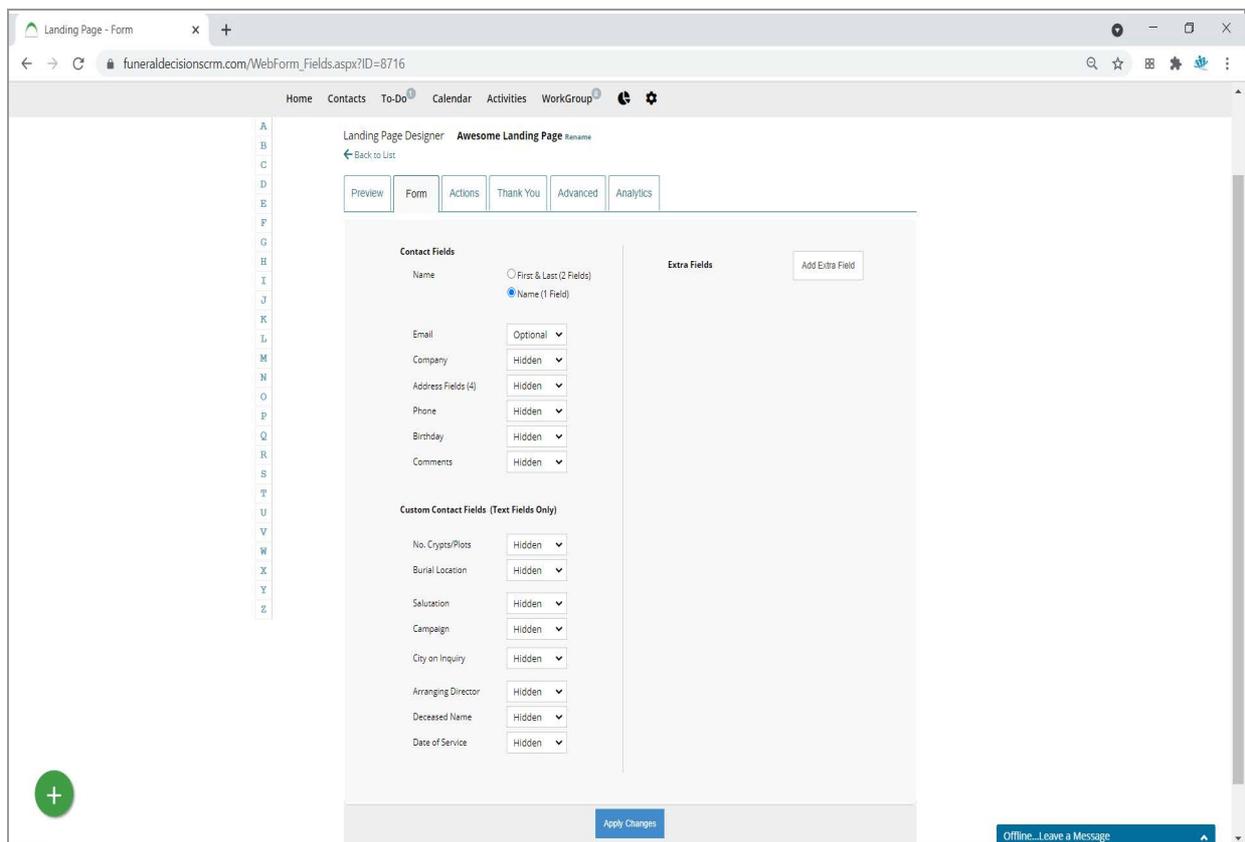
# Header Tab



Name you landing page and click "Create & Start Editing"  
Landing Page Designer

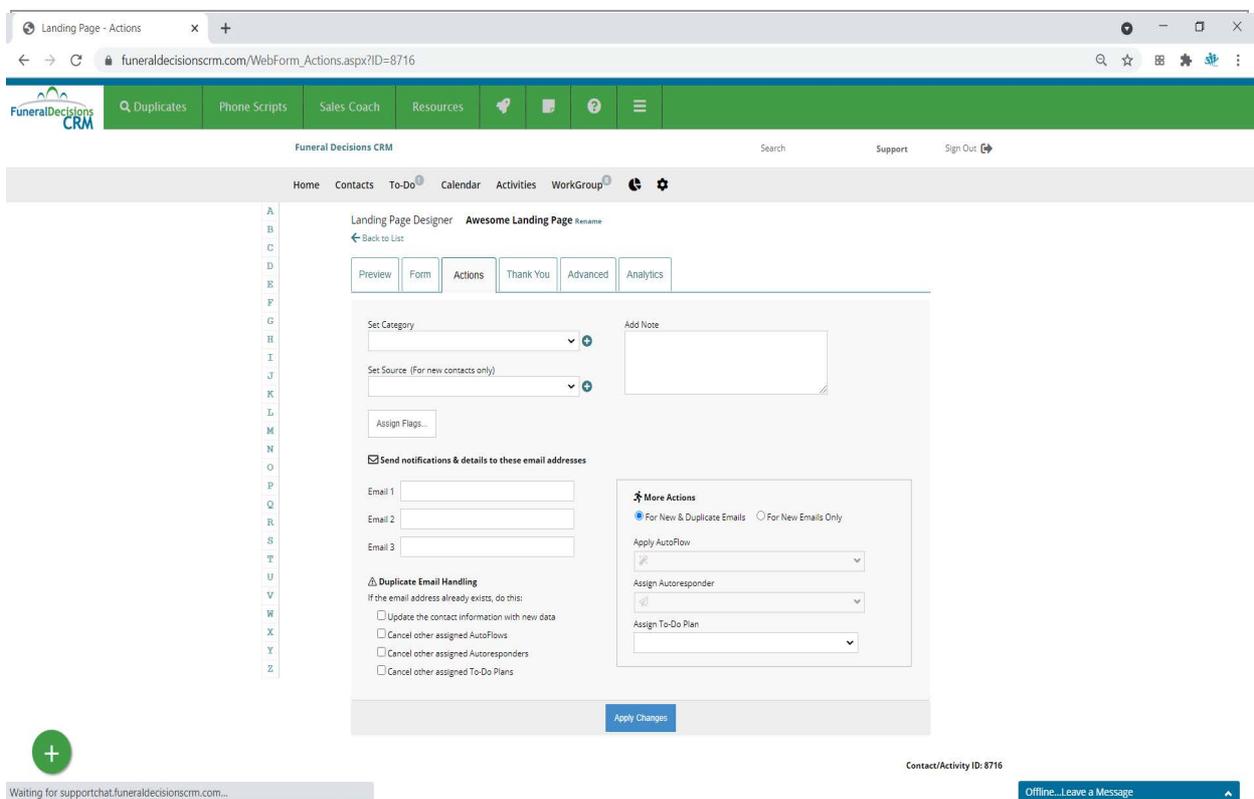


1. Preview Tab is where you preview the Landing page, Click the Arrow to see It in Full Page view



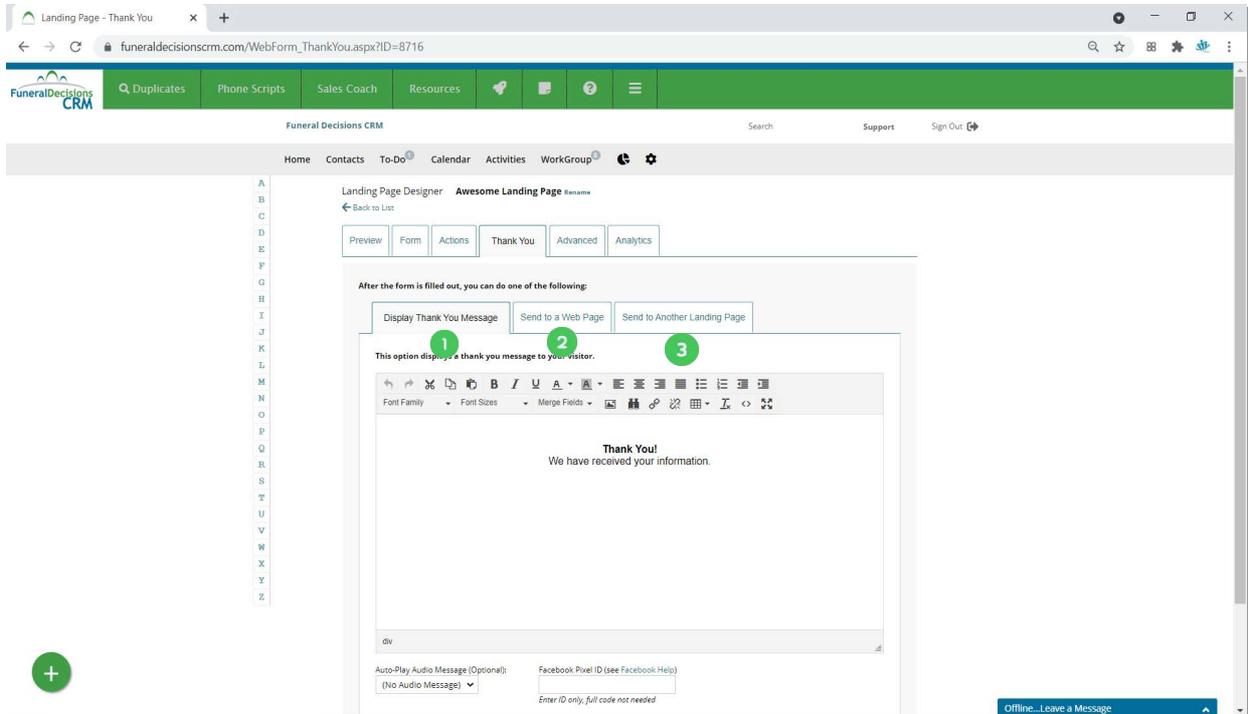
The Form section is where you add different fields to your Landing Page.

## Actions Tab



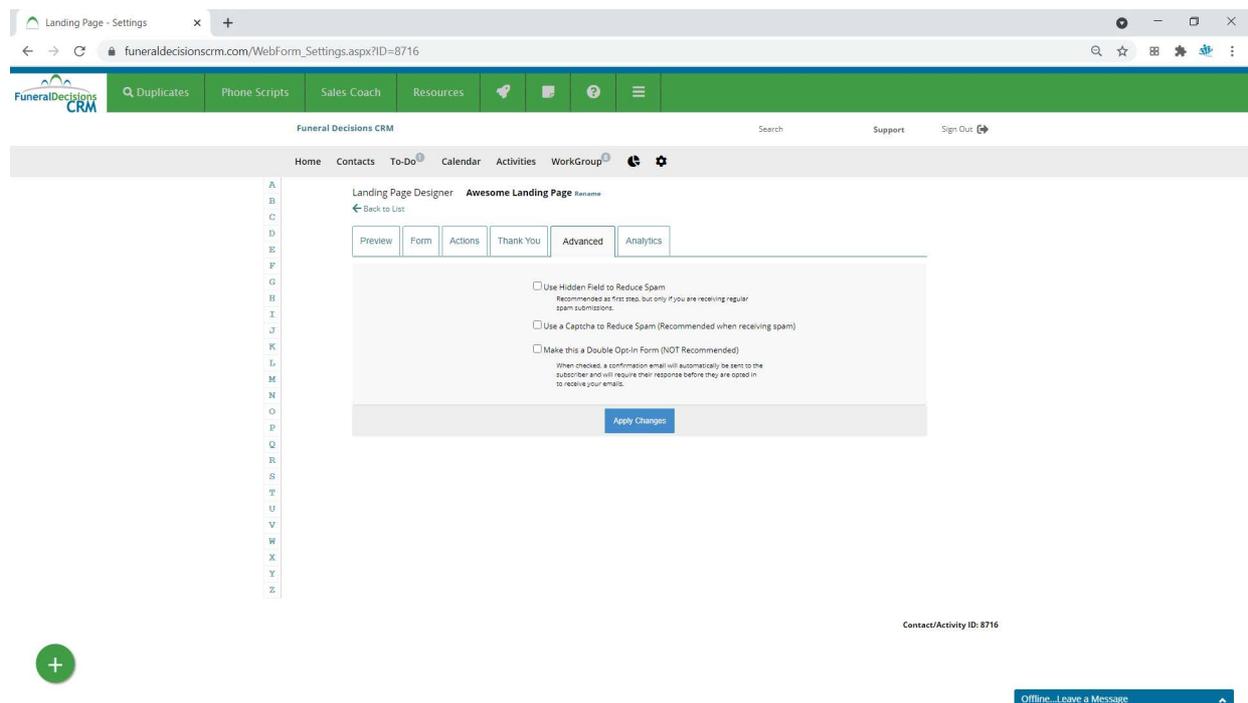
The Actions tab is where you can define what the system does to a contact after the form is submitted. You can see that there are a couple of actions that can be taken: You can Set Categories, Sources, and notes, etc.

# Thank You...what happens after they hit submit



1. You can display a thank you message. This can include images, videos or anything else you would show on a webpage.
2. Send to Another Webpage. If you have a thank you page already on your funeral home/cemetery's website then just paste that in the field.
3. Send to Another Landing Page. If you would like to create a multi-step form, you can do it with this option.

## Advanced Tab



These are some advanced options you can select, such as changing the title of the page that shows up to the visitor,

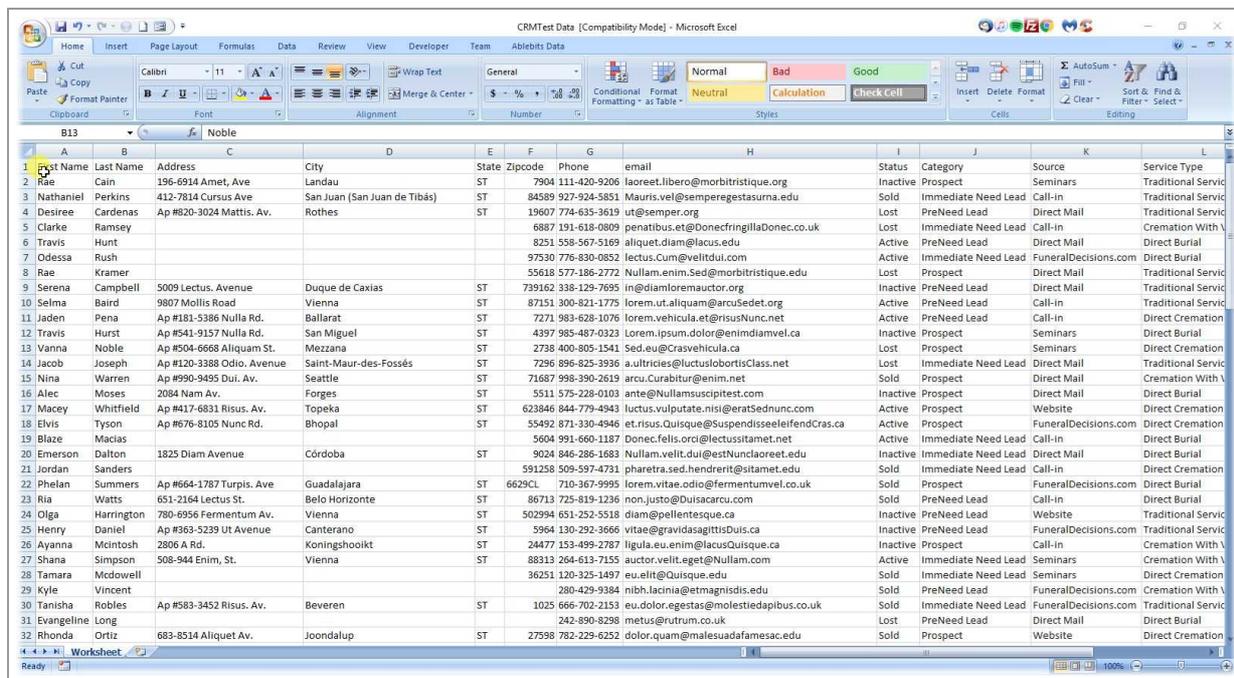
# Importing Contacts

# Getting Your Excel File Ready To Import

FuneralDecisionsCRM

FuneralDecisionsCRM allows you to import files from other systems easily via CSV files, which are excel file saved in the CSV format. This shows you how to get your excel spreadsheet ready to go.

## Your Excel File...

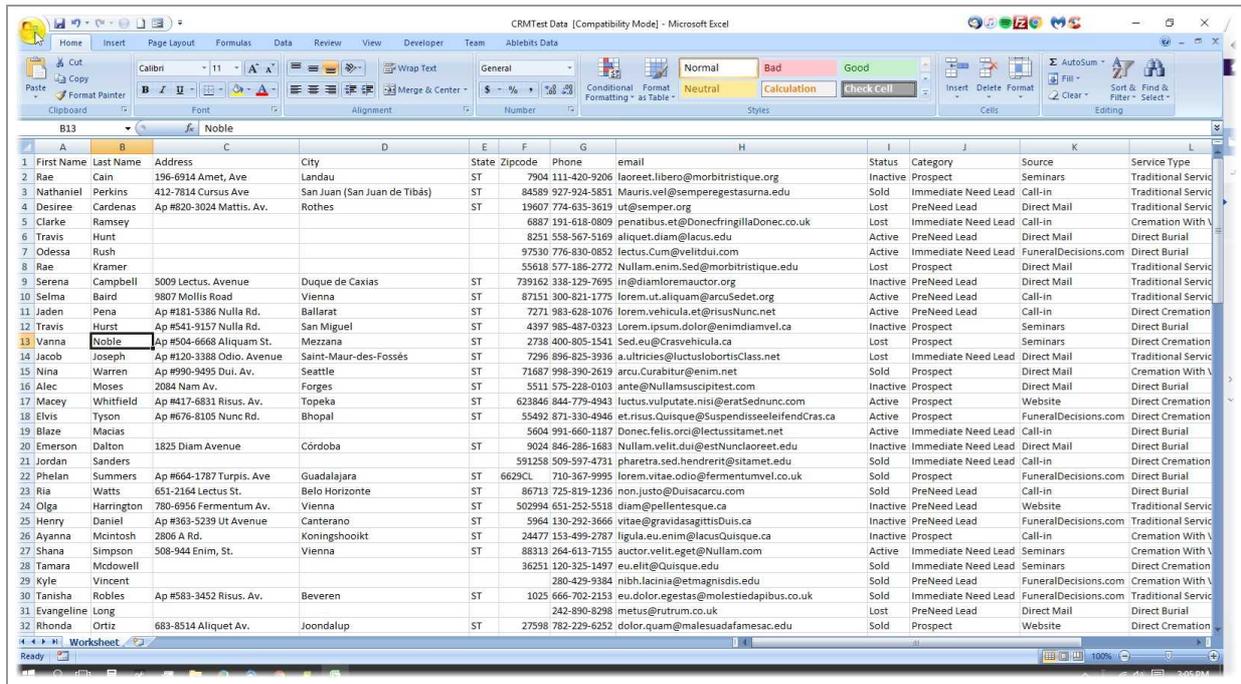


| 1  | First Name | Last Name  | Address                   | City                         | State | Zipcode | Phone        | email                                      | Status   | Category            | Source               | Service Type       |
|----|------------|------------|---------------------------|------------------------------|-------|---------|--------------|--|----------|---------------------|----------------------|--------------------|
| 2  | Rae        | Cain       | 196-6914 Amet, Ave        | Landau                       | ST    | 7904    | 111-420-9206 | laoreet.liberom@morbitristique.org         | Inactive | Prospect            | Seminars             | Traditional Servic |
| 3  | Nathaniel  | Perkins    | 412-7814 Cursus Ave       | San Juan (San Juan de Tibás) | ST    | 84589   | 927-924-5851 | Mauris.vel@sempergestasurna.edu            | Sold     | Immediate Need Lead | Call-in              | Traditional Servic |
| 4  | Desiree    | Cardenas   | Ap #820-3024 Mattis. Av.  | Rothas                       | ST    | 19607   | 774-635-3619 | ut@semper.org                              | Lost     | PreNeed Lead        | Direct Mail          | Traditional Servic |
| 5  | Clarke     | Ramsey     |                           |                              |       | 6887    | 191-618-0809 | penatibus.et@DonecingillaDonec.co.uk       | Lost     | Immediate Need Lead | Call-in              | Cremaation With V  |
| 6  | Travis     | Hunt       |                           |                              |       | 8251    | 558-567-5169 | aliquet.diam@lacus.edu                     | Active   | PreNeed Lead        | Direct Mail          | Direct Burial      |
| 7  | Odessa     | Rush       |                           |                              |       | 97530   | 776-830-0852 | lectus.Cum@velitdui.com                    | Active   | Immediate Need Lead | FuneralDecisions.com | Direct Burial      |
| 8  | Rae        | Kramer     |                           |                              |       | 55618   | 577-186-2772 | Nullam.enim.Sed@morbitristique.edu         | Lost     | Prospect            | Direct Mail          | Traditional Servic |
| 9  | Serena     | Campbell   | 5009 Lectus. Avenue       | Duque de Caxias              | ST    | 739162  | 338-129-7695 | in@diamloremmauctor.org                    | Inactive | PreNeed Lead        | Direct Mail          | Traditional Servic |
| 10 | Selma      | Baird      | 9807 Mollis Road          | Vienna                       | ST    | 87151   | 300-821-1775 | lorem.ut.aliquam@arcusSedet.org            | Active   | PreNeed Lead        | Call-in              | Traditional Servic |
| 11 | Jaden      | Pena       | Ap #181-5386 Nulla Rd.    | Ballarat                     | ST    | 7271    | 983-628-1076 | lorem.vehicula@arcusNunc.net               | Active   | PreNeed Lead        | Call-in              | Direct Cremaation  |
| 12 | Travis     | Hurst      | Ap #541-9157 Nulla Rd.    | San Miguel                   | ST    | 4397    | 985-487-0323 | lorem.ipsum.dolor@enimdiamvel.ca           | Inactive | Prospect            | Seminars             | Direct Burial      |
| 13 | Vanna      | Noble      | Ap #504-6668 Aliquam St.  | Mezzana                      | ST    | 2738    | 400-805-1541 | Sed.eu@Crasvehicula.ca                     | Lost     | Prospect            | Seminars             | Direct Cremaation  |
| 14 | Jacob      | Joseph     | Ap #120-3398 Odio. Avenue | Saint-Maur-des-Fossés        | ST    | 7236    | 896-825-3936 | a.ultrices@luctuslobortisClass.net         | Lost     | Immediate Need Lead | Direct Mail          | Traditional Servic |
| 15 | Nina       | Warren     | Ap #990-9455 Dui. Av.     | Seattle                      | ST    | 71687   | 998-390-2619 | arcu.Curabitur@enim.net                    | Sold     | Prospect            | Direct Mail          | Cremaation With V  |
| 16 | Alec       | Moses      | 2084 Nam Av.              | Forges                       | ST    | 5511    | 575-228-0103 | ante@Nullamsuscipitest.com                 | Inactive | Prospect            | Direct Mail          | Direct Burial      |
| 17 | Macey      | Whitfield  | Ap #417-6831 Risus. Av.   | Topeka                       | ST    | 623846  | 844-779-4943 | luctus.vulputate.nisi@eratSednunc.com      | Active   | Prospect            | Website              | Direct Cremaation  |
| 18 | Elvis      | Tyson      | Ap #676-8105 Nunc Rd.     | Bhopal                       | ST    | 55492   | 871-330-4946 | et.risus.Quisque@SuspendisseleifendCras.ca | Active   | Prospect            | FuneralDecisions.com | Direct Cremaation  |
| 19 | Blaze      | Macias     |                           |                              |       | 5604    | 991-660-1187 | Donec.felis.orci@lectussitamet.net         | Active   | Immediate Need Lead | Call-in              | Direct Burial      |
| 20 | Emerson    | Dalton     | 1825 Diam Avenue          | Córdoba                      | ST    | 9024    | 846-268-1683 | Nullam.velit.dui@estNuncloaeret.edu        | Inactive | Immediate Need Lead | Direct Mail          | Direct Burial      |
| 21 | Jordan     | Sanders    |                           |                              |       | 591258  | 509-597-4731 | pharetra.sed.hendrerit@sitamet.edu         | Sold     | Immediate Need Lead | Call-in              | Direct Cremaation  |
| 22 | Phelan     | Summers    | Ap #664-1787 Turpis. Ave  | Guadalajara                  | ST    | 6629CL  | 710-367-9995 | lorem.vite.odio@fermentumvel.co.uk         | Sold     | Prospect            | FuneralDecisions.com | Direct Burial      |
| 23 | Ria        | Watts      | 651-2164 Lectus St.       | Belo Horizonte               | ST    | 86713   | 725-819-1236 | non.justo@Duisarcu.com                     | Sold     | PreNeed Lead        | Call-in              | Direct Burial      |
| 24 | Olga       | Harrington | 780-6956 Fermentum Av.    | Vienna                       | ST    | 502994  | 651-252-5518 | diam@pellentesque.ca                       | Inactive | PreNeed Lead        | Website              | Traditional Servic |
| 25 | Henry      | Daniel     | Ap #363-5239 Ut Avenue    | Canterano                    | ST    | 5964    | 130-292-3666 | vitae@gravidasagittisDuis.ca               | Inactive | PreNeed Lead        | FuneralDecisions.com | Traditional Servic |
| 26 | Ayanna     | Mcintosh   | 2806 A Rd.                | Koningshooikt                | ST    | 24477   | 153-499-2787 | ligula.eu.enim@lacusQuisque.ca             | Inactive | Prospect            | Call-in              | Cremaation With V  |
| 27 | Shana      | Simpson    | 508-944 Enim. St.         | Vienna                       | ST    | 88313   | 264-613-7155 | auctor.velit.eget@Nullam.com               | Active   | Immediate Need Lead | Seminars             | Cremaation With V  |
| 28 | Tamara     | McDowell   |                           |                              |       | 36251   | 120-325-1497 | eu.elit@Quisque.edu                        | Sold     | Immediate Need Lead | Seminars             | Direct Cremaation  |
| 29 | Kyle       | Vincent    |                           |                              |       | 280     | 429-9384     | nibh.lacinia@etmagnisdis.edu               | Sold     | PreNeed Lead        | FuneralDecisions.com | Cremaation With V  |
| 30 | Tanisha    | Robles     | Ap #583-3452 Risus. Av.   | Beveren                      | ST    | 1025    | 866-702-2153 | eu.dolor.egestas@molestiedaplibus.co.uk    | Sold     | Immediate Need Lead | FuneralDecisions.com | Traditional Servic |
| 31 | Evangelina | Long       |                           |                              |       | 242     | 890-8298     | metus@rutrum.co.uk                         | Lost     | PreNeed Lead        | Direct Mail          | Direct Burial      |
| 32 | Rhonda     | Ortiz      | 683-8514 Aliquet Av.      | Joondalup                    | ST    | 27598   | 782-229-6252 | dolor.quam@malesuadafamesac.edu            | Sold     | Prospect            | Website              | Direct Cremaation  |

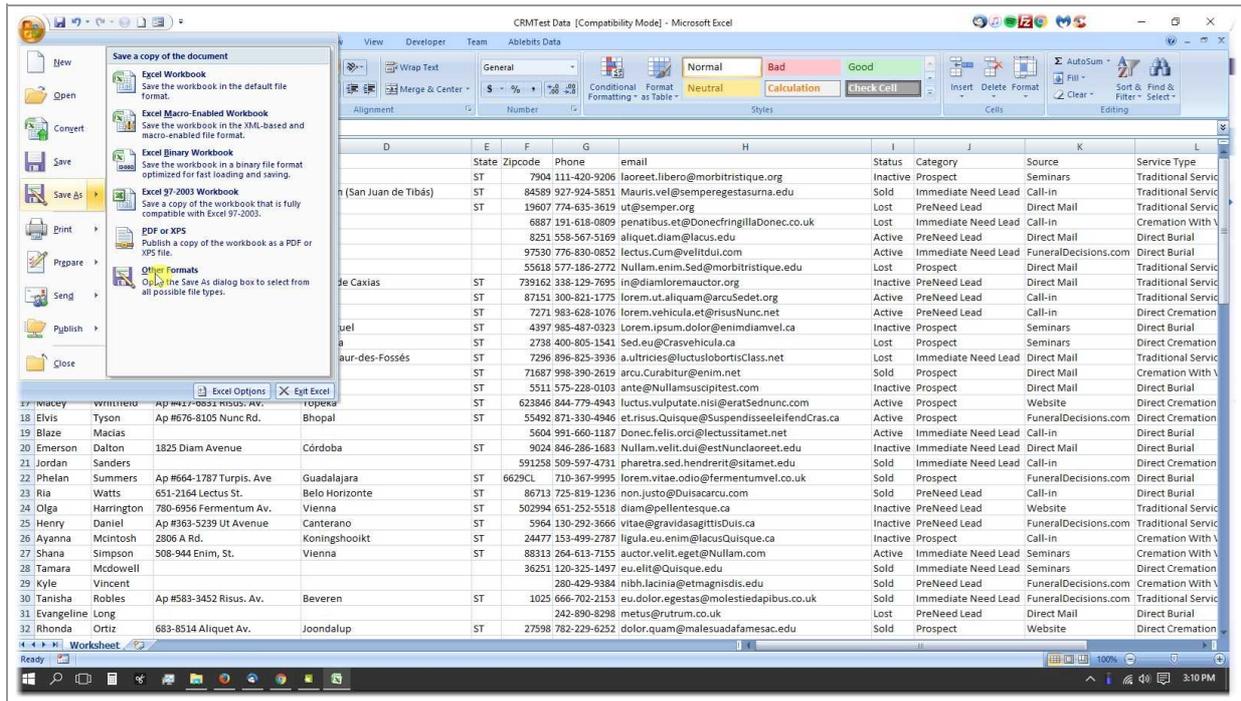
There are a couple of things to keep in mind before importing a list of contacts in the CRM system.

1. The first row needs to be the column headings. There cannot be any empty rows above this first row or in between records.
2. Names need to be split into First Name and Last Name columns. The system will not import names correctly if the first and last name are in the same cell.
3. Address, City, State, and Zip need to all be in different columns. Files that have city, state and zip in the same cell will not import correctly.

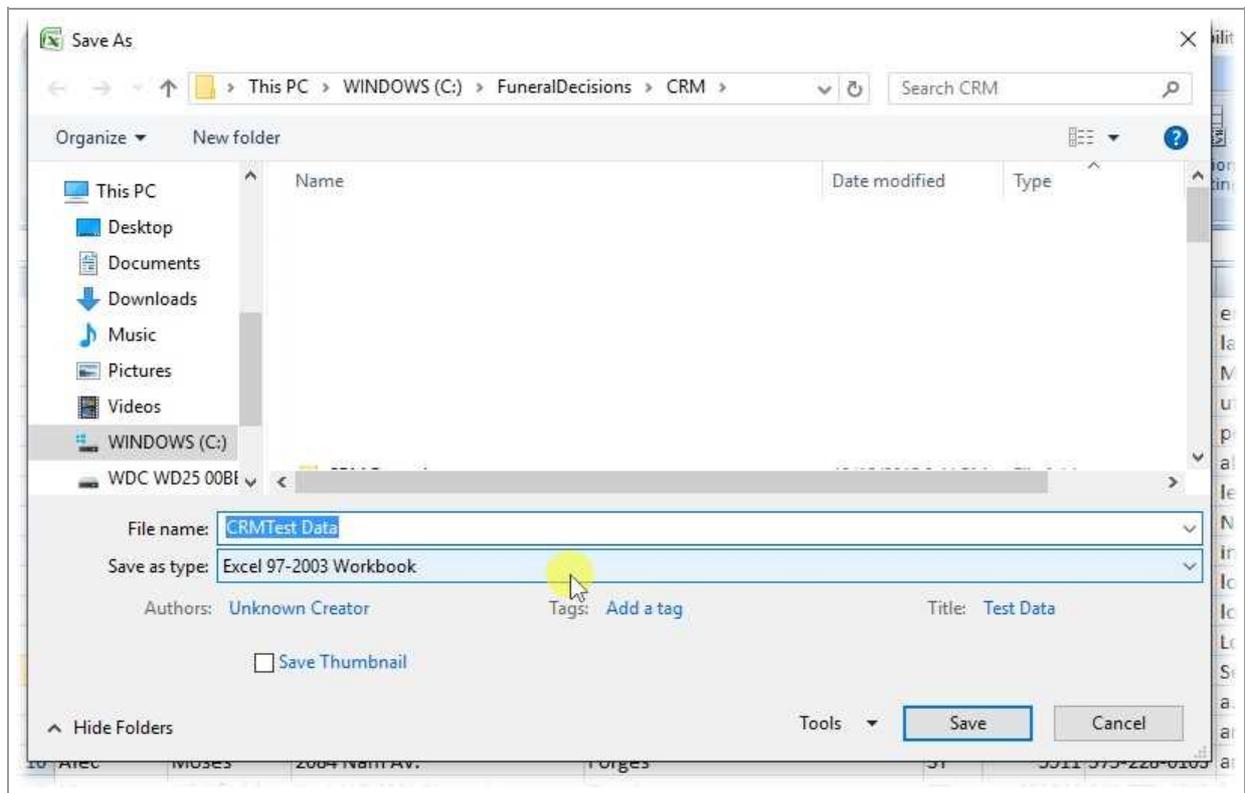
# Saving as a CSV file...



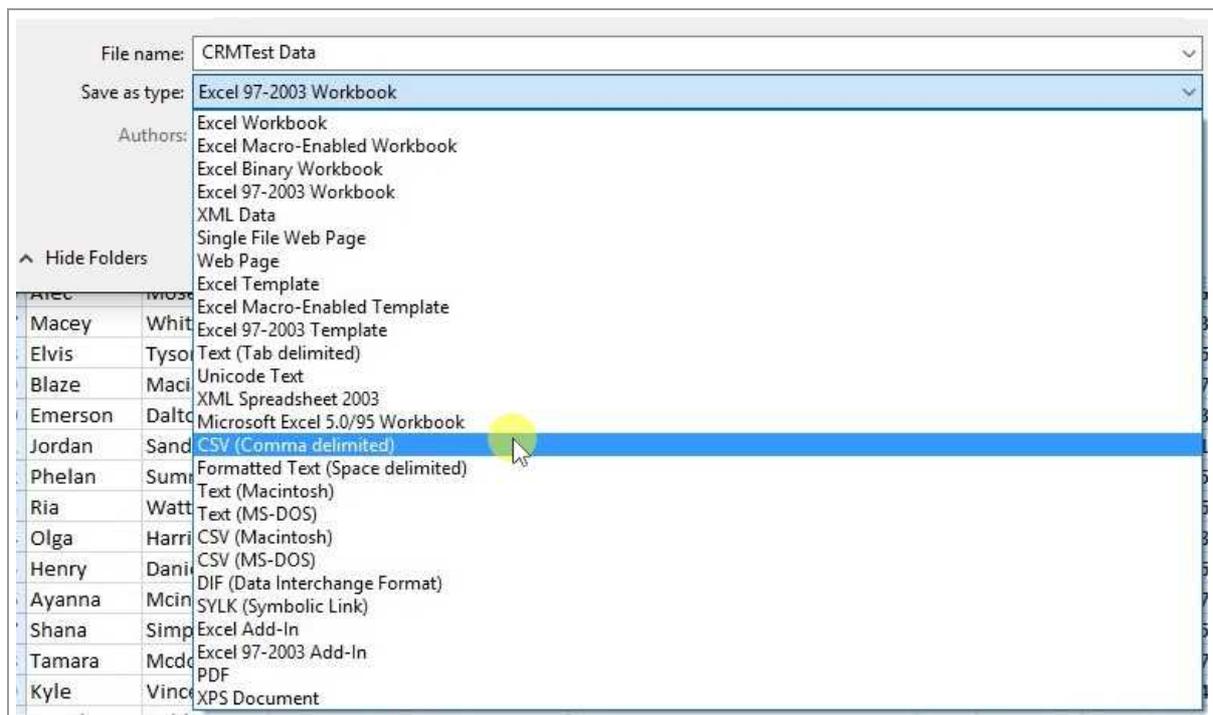
Depending on what version of Excel you have the process may be slightly different..  
Click on "Office Button" (Upper left hand corner)



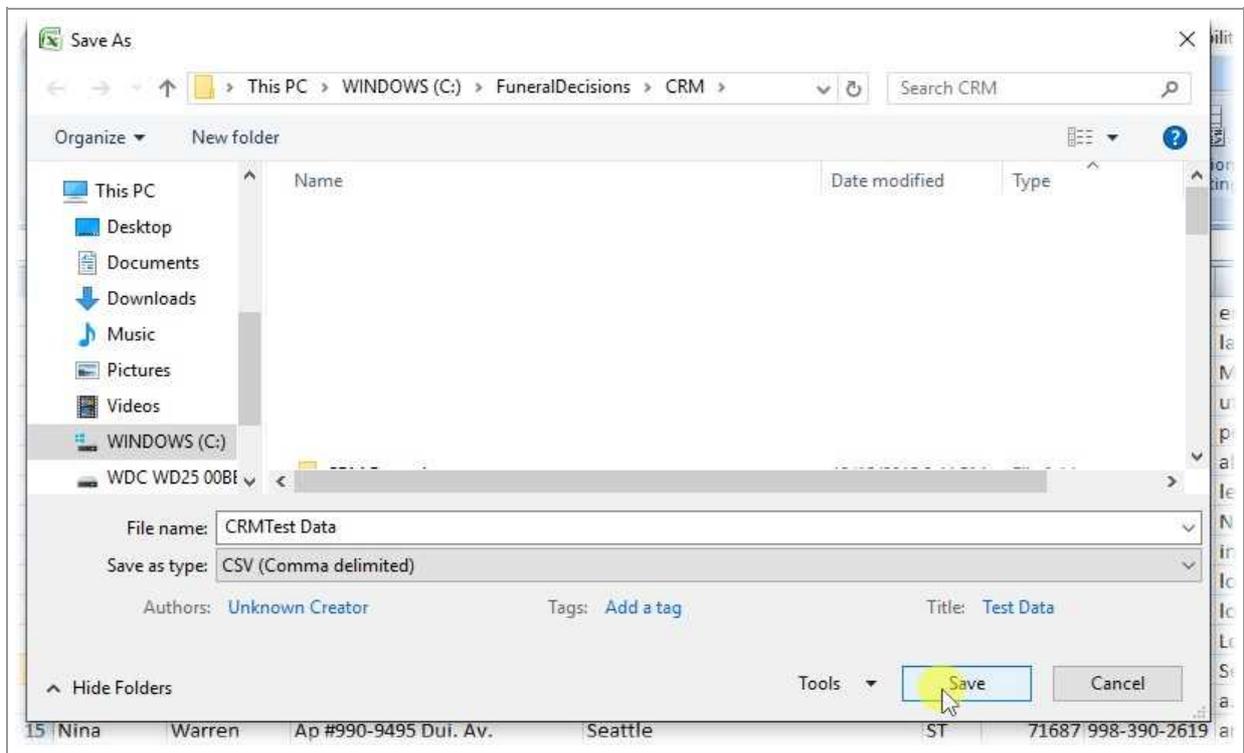
Go to "Save As" and select "Other Formats"



1. Select the folder where you wish to save the file.
2. Type a new file name or leave as is.
3. Click on the "Save as type:" dropdown menu.



Select the "CSV (Comma delimited) " item



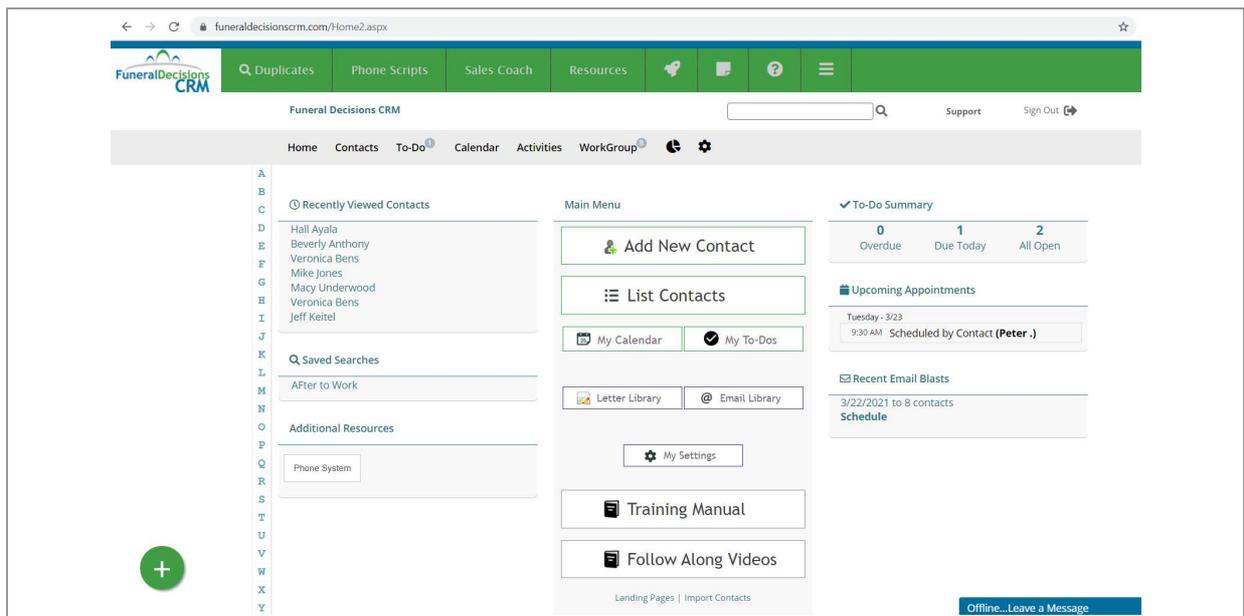
Click on "Save" button

# Import Contacts In Bulk

*FuneralDecisionsCRM*

With FuneralDecisionsCRM it is easy to import contacts from another database or that are in an excel spreadsheet. It is important to note that the file must be saved as a CSV file.

## Import Contacts



Click on the "Import Contacts" button on the "Home" screen or from the "Settings" menu.

You can import basic demographic data from another database by following these steps:

**First...**

Use the Export function in your old system to get your data into a .CSV file format.

**Next...**

**Assign**

Team Database:

Category:

Status:

Source:

Flag:

**Advanced Options**

Enable import of Categories, Source, and Flags.  
WARNING: Enabling this option will create library entries for any new data encountered in your import file. This has the potential to create a lot of extra library entries if your source data has 'garbage' data in it, or if you map the wrong fields to the categories, source & flags fields.

Allow duplicate records to be imported for this imported file.

**Option for managers/administrators only.**  
 If all leads are going to a single counselor, select that counselor. If going to different counselors, import into your database and assign from there.

**Finally...**

Upload your contacts here:  No file selected.

[Need help?](#)

1. Check "Enable import of Categories, Source, and Flags."(If all of your contacts are the same status and from the same source you can use the drop down menus, otherwise check this box and ignore the drop downs).
2. Check "Allow duplicate records to be imported for this imported file"

You can import basic demographic data from another database by following these steps:

**First...**

Use the Export function in your old system to get your data into a .CSV file format.

**Next...**

**Assign**

Team Database:

Category:

Status:

Source:

Flag:

**Advanced Options**

Enable import of Categories, Source, and Flags.  
WARNING: Enabling this option will create library entries for any new data encountered in your import file. This has the potential to create a lot of extra library entries if your source data has 'garbage' data in it, or if you map the wrong fields to the categories, source & flags fields.

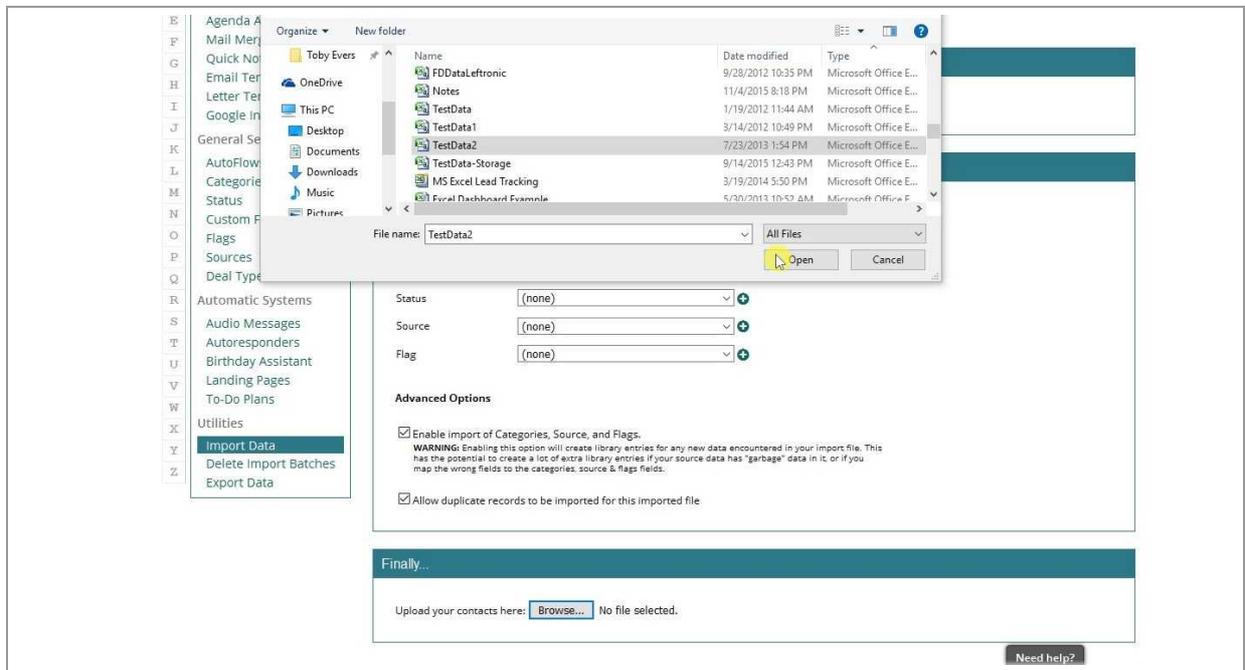
Allow duplicate records to be imported for this imported file.

**Finally...**

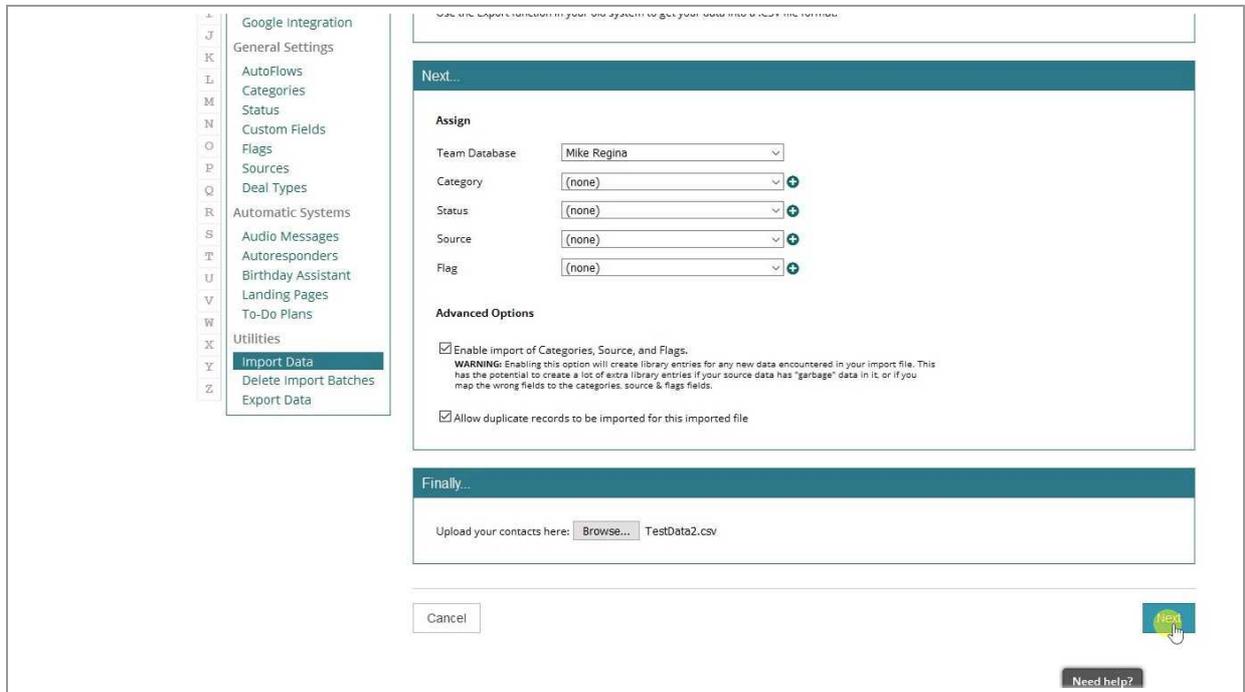
Upload your contacts here:  No file selected.

[Need help?](#)

Click the "Browse" button to select your CSV file



Select your file and click "Open"



Then click "Next"

# Mapping Data

Here is a sampling of data in the file you are about to import. Look at the columns on the left and then select the correct field from the menu on the right. Once you have done this for all of the data elements, then click "Import" below.

If your file has column headers, we have attempted to help you with the mapping based on the data you are importing. PLEASE verify and/or fix our mapping attempt as this is not an exact science.

| Sample Data From Your File  | Put Data Into This Field |
|---|--------------------------|
| First Name, Brenden, Adara, Freya, Serena, Latifah, Omar, James, Boris, Patience, Caldwell, Luciu...  | > > First Name           |
| Last Name, Munoz, Logan, Caldwell, Brooks, Crane, Burt, Stanley, English, Waters, Nieves, Frank,...   | > > Last Name            |
| Address, Ap #422-8536 Magna. Street, 7557 Sem Avenue, P.O. Box 772, 8682 Lorem, Rd., P.O. Box 120...  | > > Address              |
| City, Cranston, Hazleton, Independence, Charlottesville, Arlington, Waukegan, St. George, Murfree...  | > > City                 |
| State, Pennsylvania, Louisiana, IA, Vermont, Tennessee, North Carolina, OK, KY, Tennessee, Oregon...  | > > State                |
| Zip, 46636, 90233, 64225, 34543, 17375, 92232, 88239, 95306, 65394, 41421, 68295, 26040, 19391, 1...  | > > Postal Code          |
| Email, enim@Vivamusnibh.edu, Aenean.egestas@Proinnon.edu, varius@Inmipede.ca, feugiat@IberoProin...   | > > Email                |
| Phone, 1-737-352-2163, 1-469-116-4317, 1-606-309-7300, 1-660-210-9187, 1-770-462-2357, 1-264-809-...  | > > Home Phone           |
| Birthday, 3-Sep-41, 21-Jul-73, 3-Jan-70, 31-Aug-54, 9-Mar-74, 7-Nov-35, 3-Mar-51, 29-Jun-56, 5-Jul... | > > Birthday             |
| Service Type, Funeral, Burial, Funeral, Burial, Burial, Burial, Cremation, Funeral, Cremation, Cr...  | > > (Skip this field)    |

Need help?

FuneralDecisionsCRM will automatically try to map the fields in your CSV file to fields in the system...however this does not always work. When the system does not know what a field in the CSV file is, then it will show up as "Skip this field" in the drop down. To make sure it gets imported correctly, click on the drop down and select the field in FuneralDecisionsCRM that matches up with the field in the CSV file.

Then scroll down and click "Run Import"

FuneralDecisions CRM

Search For Duplicates Help Using The System Other Resources Custom Quote Builder FD-Drive Contact Support SharePoint Server Email Builder

Funeral Decisions CRM demo@foundation.com Sign Out

Home Contacts To-Do Calendar Deals ClientTouch

Settings

Personal Settings

Account Settings... Agenda Assistant Mail Merge Profile Quick Notes Email Templates Letter Templates Google Integration

General Settings

AutoFlows Categories Status Custom Fields Flags Sources Deal Types

Automatic Systems

Audio Messages Autoresponders Birthday Assistant Landing Pages To-Do Plans

Import Success

Contacts Imported: 100  
Skipped (Duplicate): 0

Send Imported Contacts to ClientTouch

It's a good idea to check a few contacts that were just imported to make sure everything came over correctly.

If you see problems and want to delete this import, you can easily remove the contacts you just imported.

To delete an import, go to **Settings > Delete Import Batches**.

Need help?

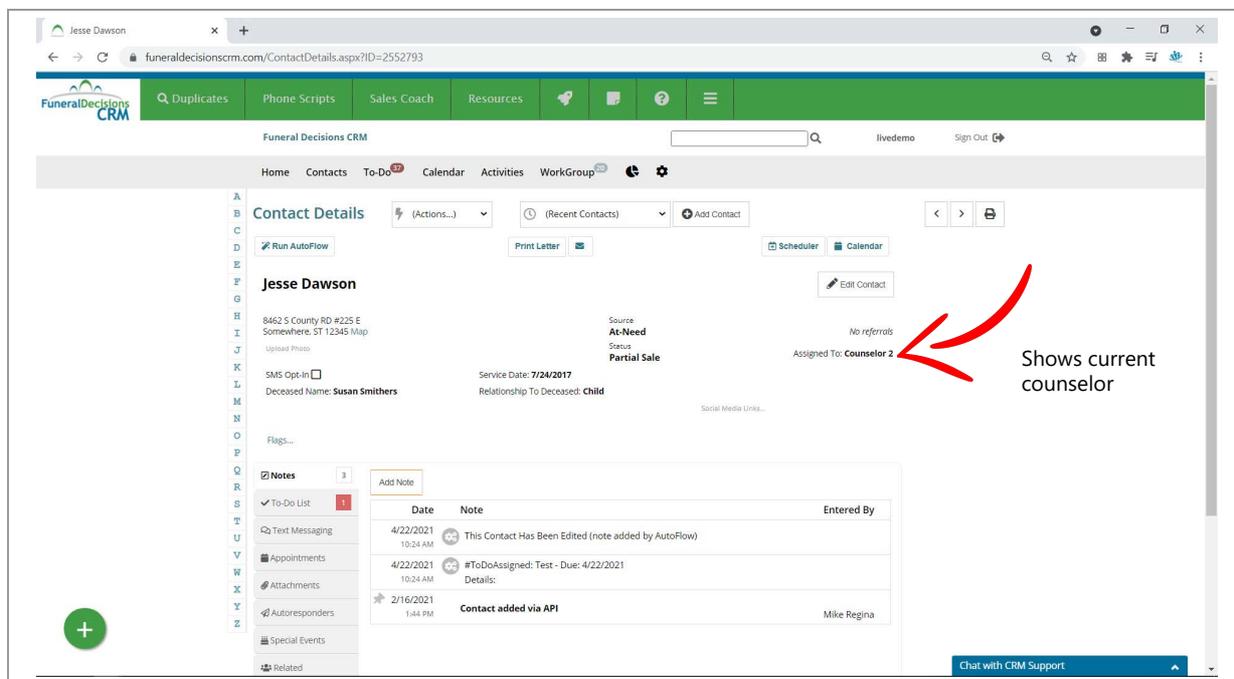
After you import the settings, you will see if there were any issues with the import. You also have the ability to send those contacts to **Work Group** to bulk add to-dos, notes, or anything else.

# Re-Assigning Leads (Administrators Level Users)

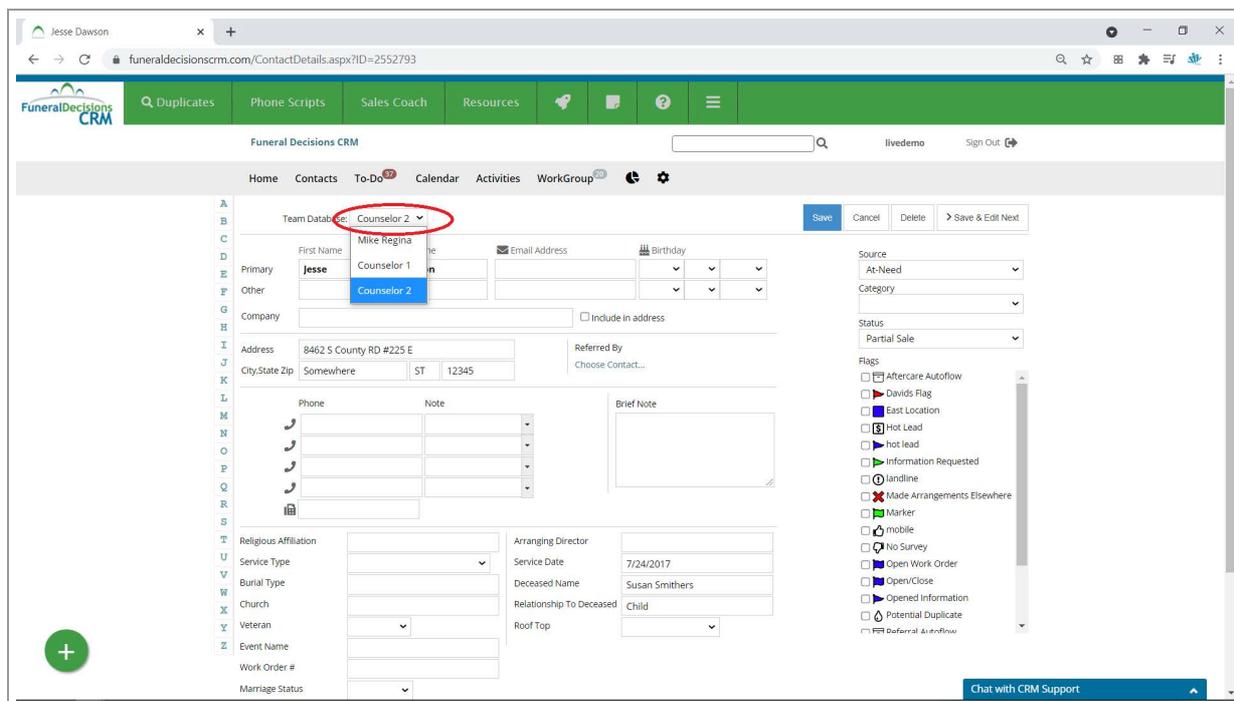
# Re-Assign A Single Contact

When you need to re-assign a contact from one counselor (or your own database) to another counselor.

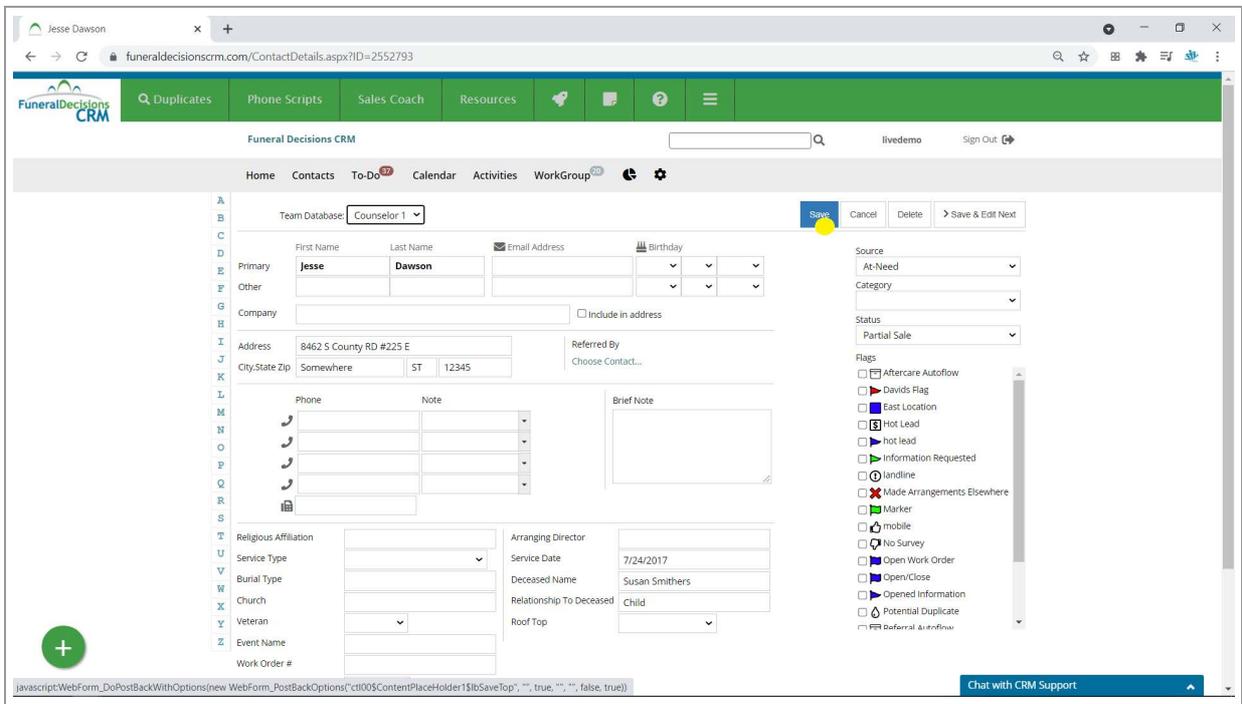
## To Re-Assign a Single Contact



1. Go to the contact record. You will see who it is currently assigned too.
2. Click on the "Edit Contact" button, which is located above the "Assigned To:" label.



Once you are in the contact Editor, you will find a drop down directly above the First and Last name of the contact called "Team Database". Simply click on that drop down menu and select the new counselor the lead should be assigned too.



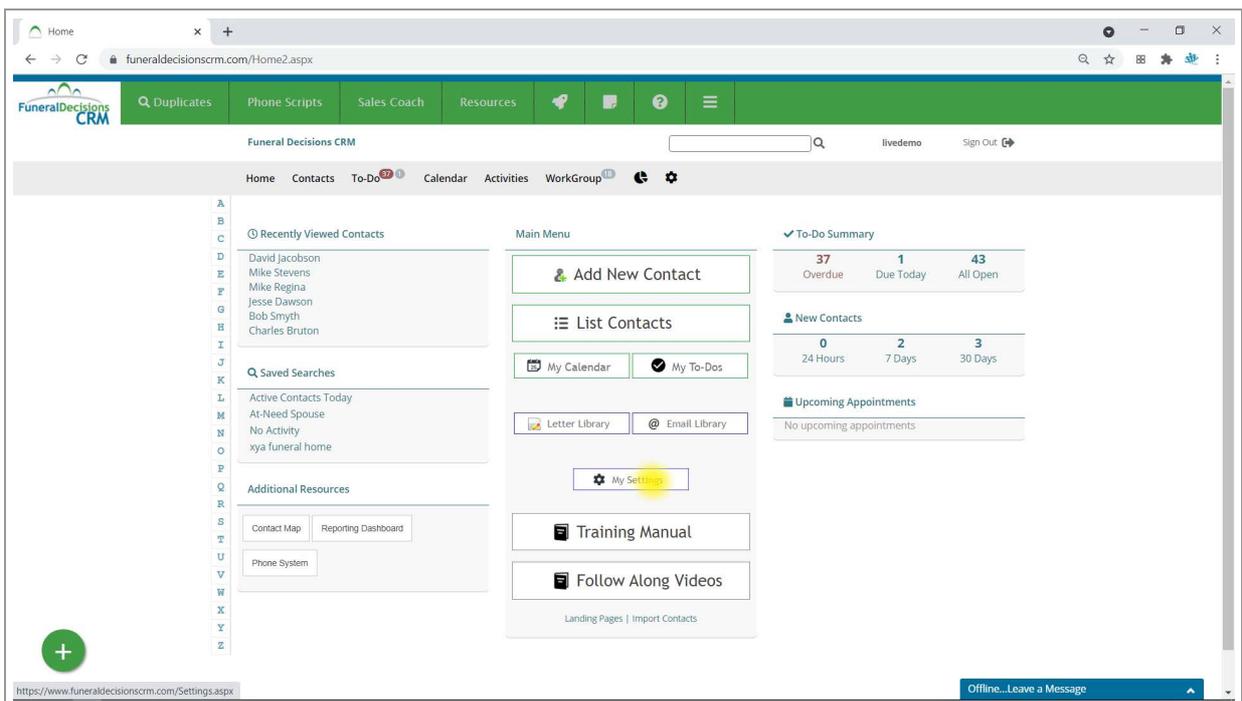
Click on "Save". The lead is now moved to the new counselor's database.

# Re-Assign Multiple Contacts

*FuneralDecisionsCRM*

Easily re-assign leads in bulk. In this example, we will move leads from one counselor to another. In order to move a more specific group...ie people in a certain status, source or any combination of any criteria, refer to the section on filtering contacts.

## To Move Leads From One Counselor To Another



From the Home Screen...Click on "List Contacts"

FuneralDecisions CRM

Home Contacts To-Do<sup>27</sup> Calendar Activities WorkGroup<sup>23</sup>

Contacts (Recent Contacts) Add Contact

Basic Search Advanced Search

Category Status Source Flag Team Database

Columns: My View All 39 records. Send Results to WorkGroup

| Name               | Add Date  | Last Note  | Status       | Source         | Team Member |
|--------------------|-----------|------------|--------------|----------------|-------------|
| Bruton, Charles    | 3/5/2019  | 4/13/2021  |              |                |             |
| Conrad, Macaulay   | 5/21/2018 | 3/25/2021  | Active       | DM - Newspaper |             |
| Dawson, Jesse      | 5/21/2018 | 2/17/2020  | Partial Sale | At-Need        | Me          |
| Estrada, Kenyon    | 5/21/2018 | 3/25/2021  | Active       | Seminars       | Me          |
| Farmer, Dexter     | 5/21/2018 | 4/9/2021   | Active       | At-Need        | Me          |
| Fitzpatrick, Halla | 5/21/2018 | 8/27/2020  | Active       | At-Need        | Me          |
| Fowler, Mira       | 5/21/2018 | 3/25/2021  | Active       | DM - Newspaper | Me          |
| Higgins, Jasper    | 5/21/2018 | 10/23/2019 | Active       | At-Need        | Me          |
| Houston, Angelica  | 5/21/2018 | 1/14/2020  | Active       | At-Need        | Me          |
| Jacobson, David    | 4/29/2021 | 4/29/2021  | Active       |                | Me          |
| Johnson, John      | 8/27/2020 | 3/25/2021  | Active       | Cold Call      | Me          |
| Knowles, Cruz      | 5/21/2018 | 10/23/2019 | Active       | At-Need        | Me          |
| Mathews Wyatt, .   | 5/26/2020 | 3/25/2021  |              |                | Me          |
| Mckay, Harriet     | 5/21/2018 |            |              | At-Need        | Me          |

Offline...Leave a Message

Click on the "Team Database" drop down and select the counselor who has the leads you want to re-assign from.

FuneralDecisions CRM

Home Contacts To-Do<sup>27</sup> Calendar Activities WorkGroup<sup>23</sup>

Contacts (Recent Contacts) Add Contact

Basic Search Advanced Search

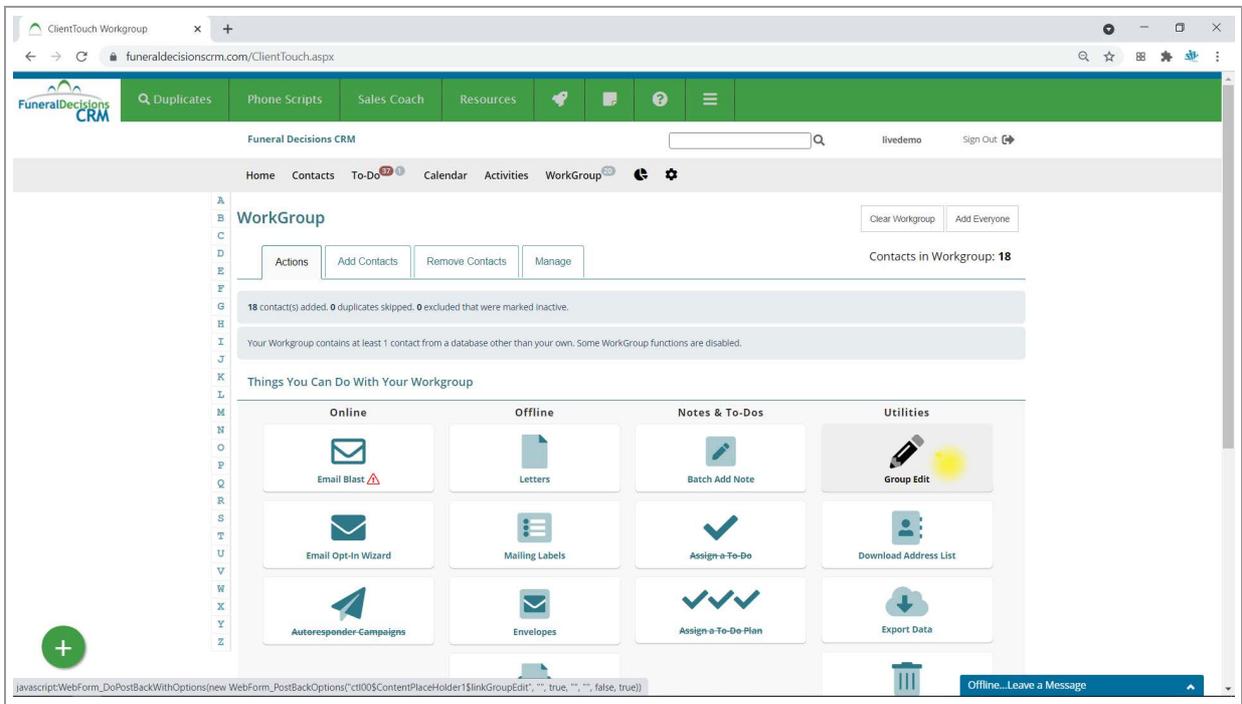
Category Status Source Flag Team Database

Columns: My View Viewing all 18 records. Send Results to WorkGroup

| Name               | Add Date  | Last Note | Status       | Source         | Team Member |
|--------------------|-----------|-----------|--------------|----------------|-------------|
| ..                 | 2/16/2021 | 2/16/2021 |              |                | Counselor 1 |
| ..                 | 2/16/2021 | 2/16/2021 |              |                | Counselor 1 |
| Bruton, Charles    | 2/16/2021 | 2/16/2021 |              |                | Counselor 1 |
| Bruton, Charles    | 2/23/2021 | 2/23/2021 |              |                | Counselor 1 |
| Dawson, Jesse      | 2/23/2021 | 2/23/2021 | Partial Sale | At-Need        | Counselor 1 |
| Delgado, Clark     | 5/21/2018 | 2/5/2021  | Active       | DM - Newspaper | Counselor 1 |
| Fitzpatrick, Halla | 2/16/2021 | 2/16/2021 | Active       | At-Need        | Counselor 1 |
| Fitzpatrick, Halla | 2/23/2021 | 2/23/2021 | Active       | At-Need        | Counselor 1 |
| Higgins, Jasper    | 2/16/2021 | 2/16/2021 | Active       | At-Need        | Counselor 1 |
| Higgins, Jasper    | 2/23/2021 | 2/23/2021 | Active       | At-Need        | Counselor 1 |
| Knowles, Cruz      | 2/16/2021 | 2/16/2021 | Active       | At-Need        | Counselor 1 |
| Knowles, Cruz      | 2/23/2021 | 2/23/2021 | Active       | At-Need        | Counselor 1 |
| Mckay, Harriet     | 2/16/2021 | 2/16/2021 |              |                | Counselor 1 |
| Mckay, Harriet     | 2/23/2021 | 2/23/2021 |              |                | Counselor 1 |

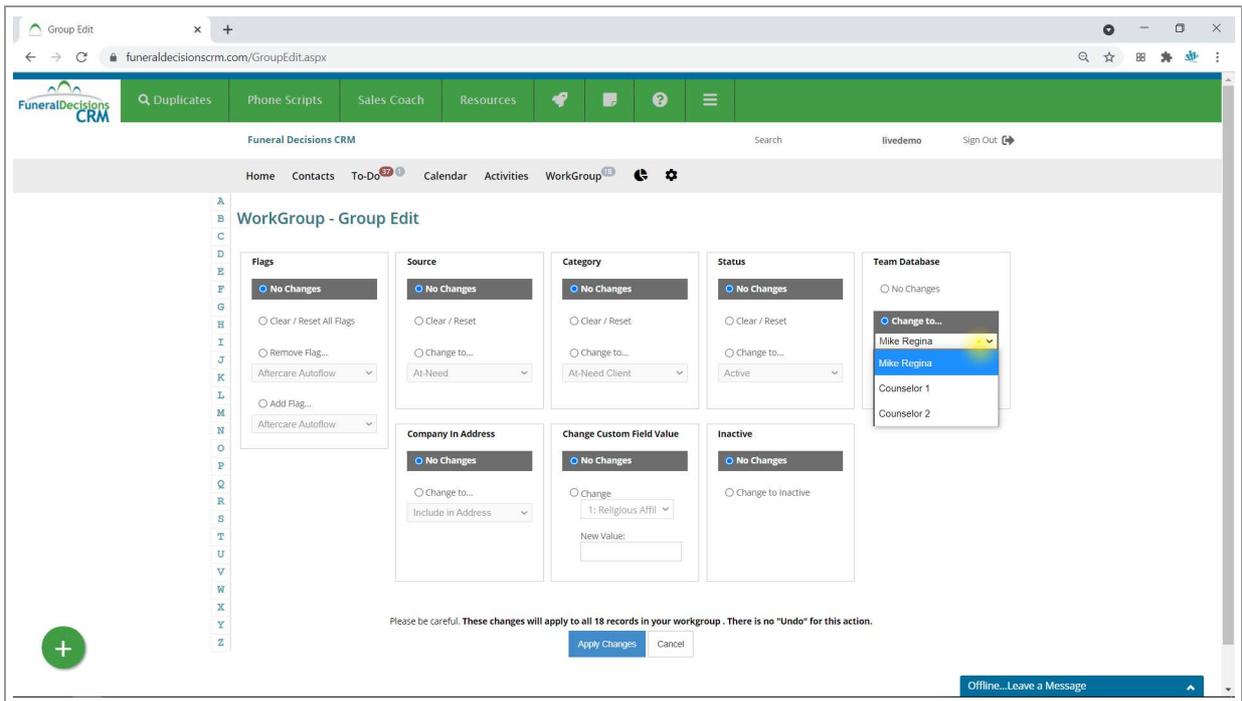
Offline...Leave a Message

You will now be looking at their leads. Click on " Send Results to Work Group".



NOTE: If you have contacts already in Work Group, the system will ask you if you want to create a new group or combine with the existing. You will want to select "Create New Group".

Once in the WorkGroup menu, click on the "Group Edit" button located under the "Utilities" section.



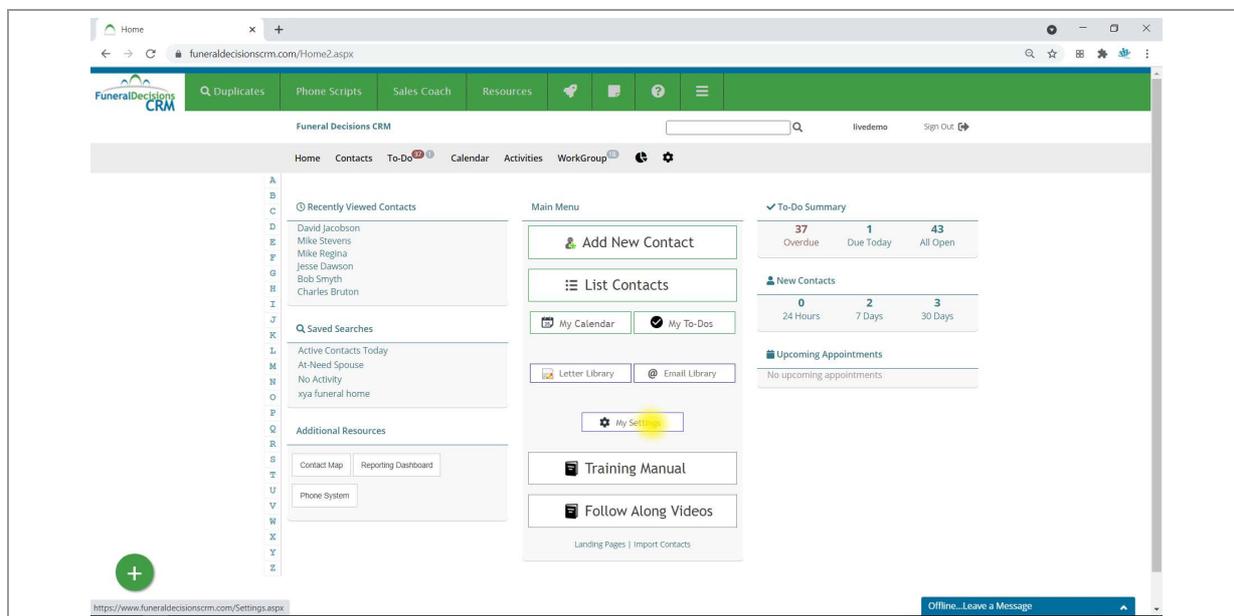
Under the "Team Databases" column, you will want to select the radio button next to "Change to...". You will then select the counselor where the leads should be re-assigned to.



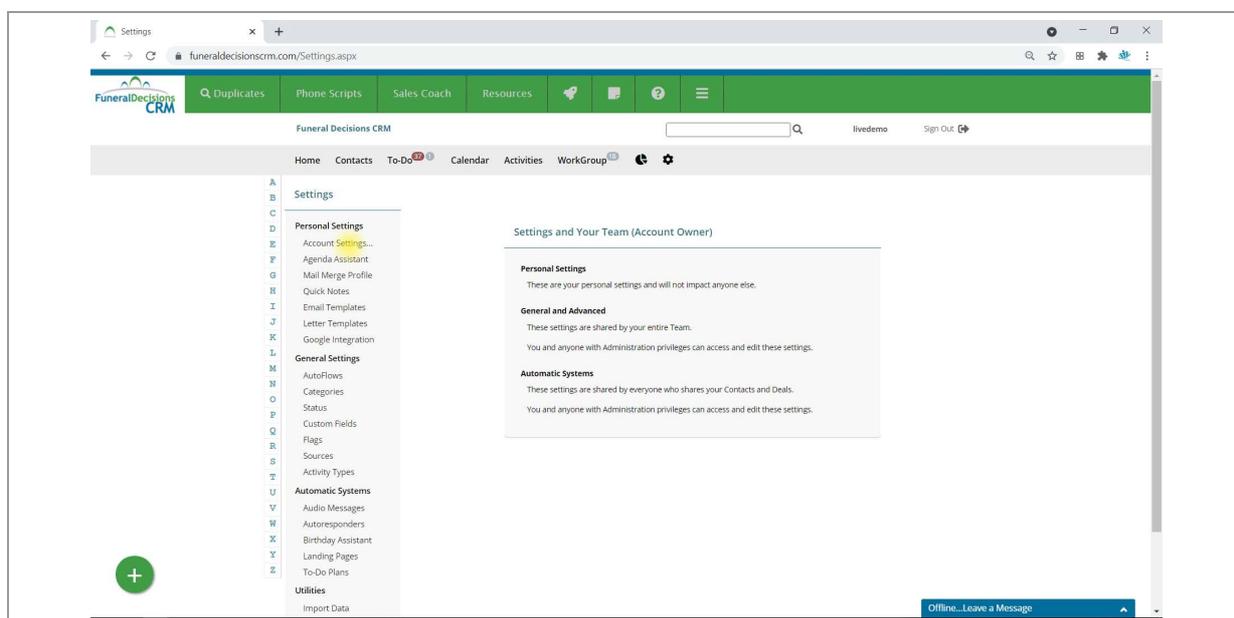
# User Management (Administrator Level Users)

# Adding New Users

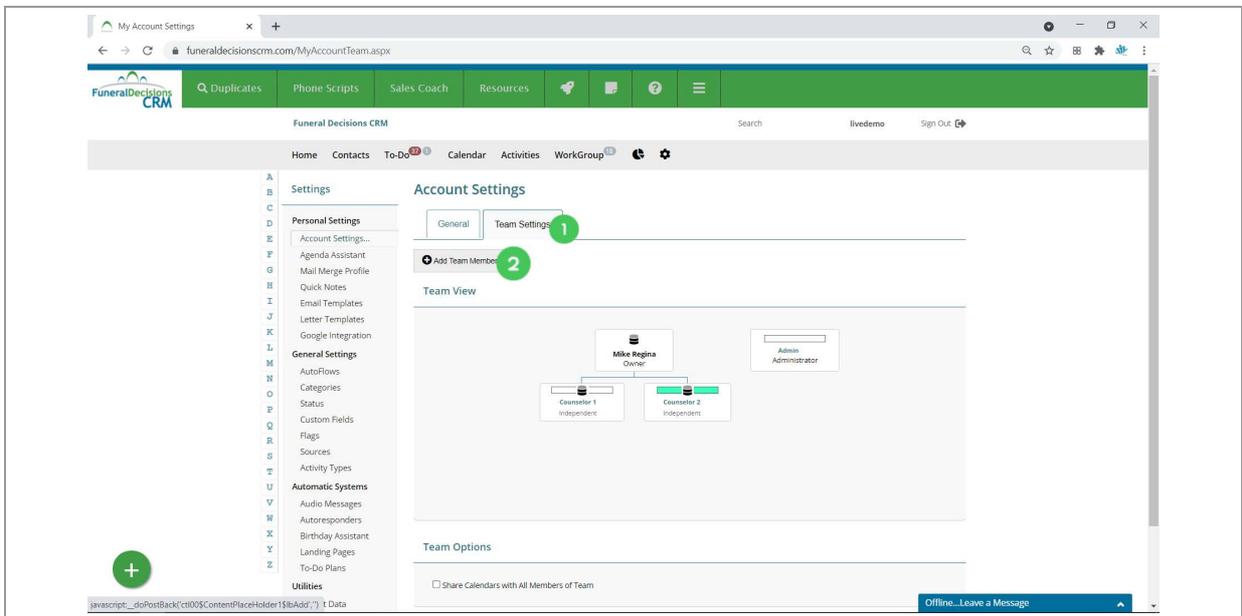
Administrators have the ability add and delete users.



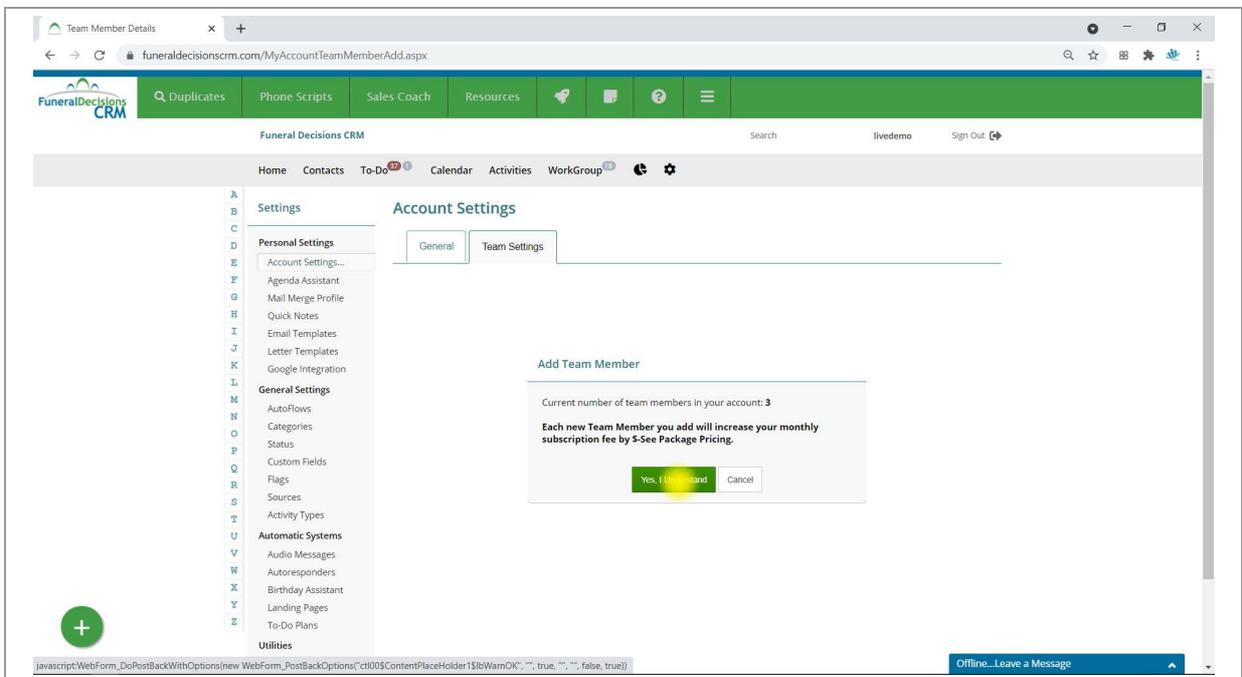
Click on "Settings"



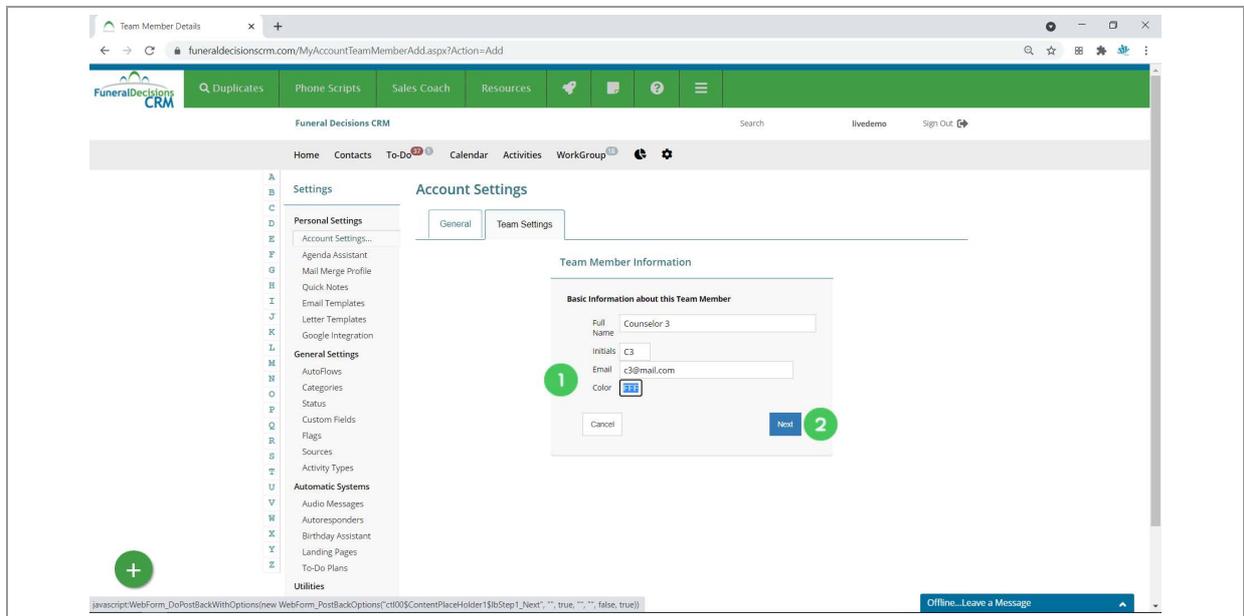
Click on "Account Settings..."



1. Click on "Team Settings"
2. Click on " Add Team Member "

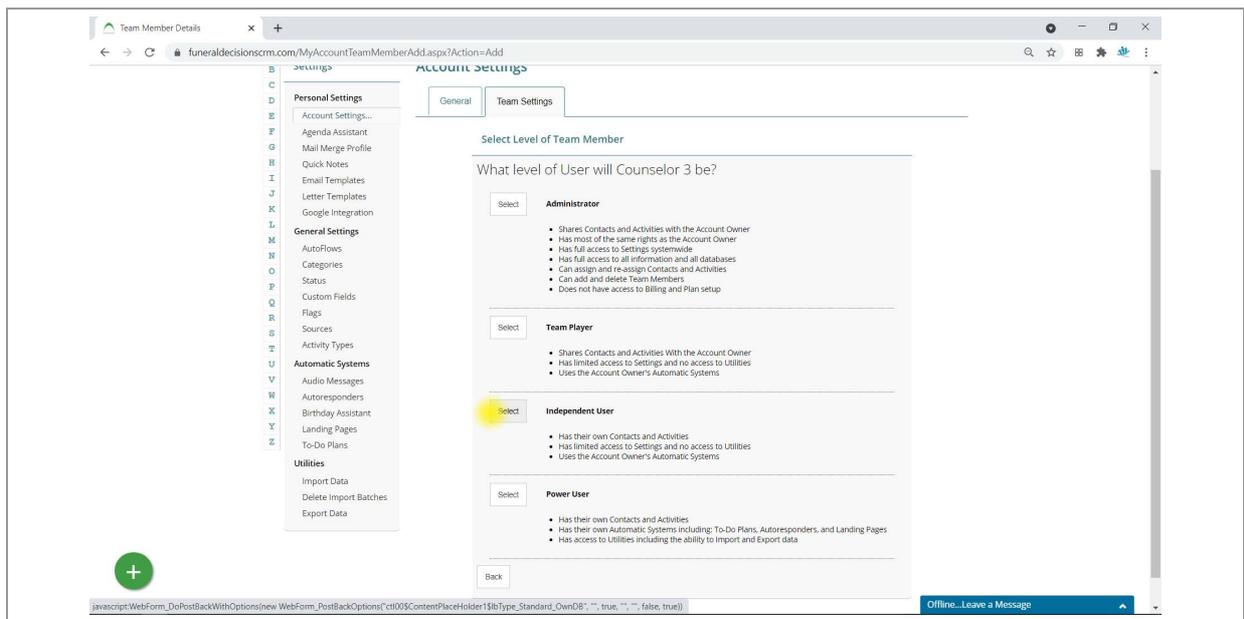


Click the "Yes, I Understand" button

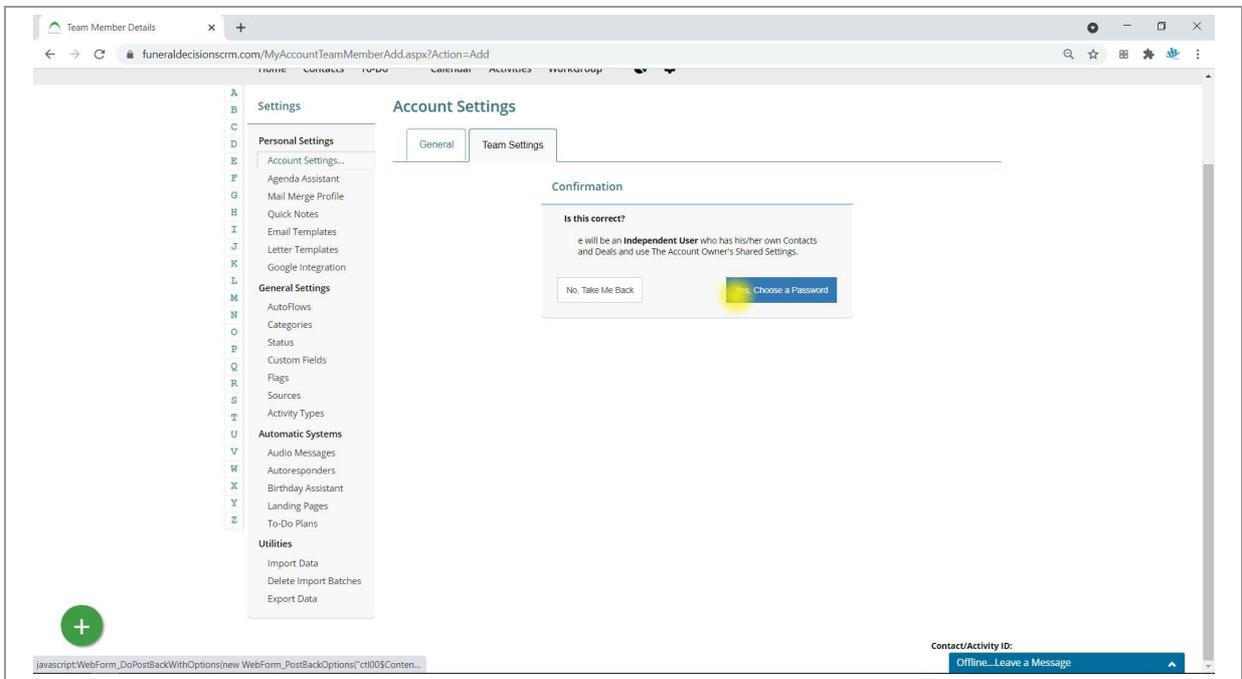


1. Enter the counselor's name, initials and email address to be used for logging in (this can be a completely arbitrary email if needs be)
2. Click "Next"

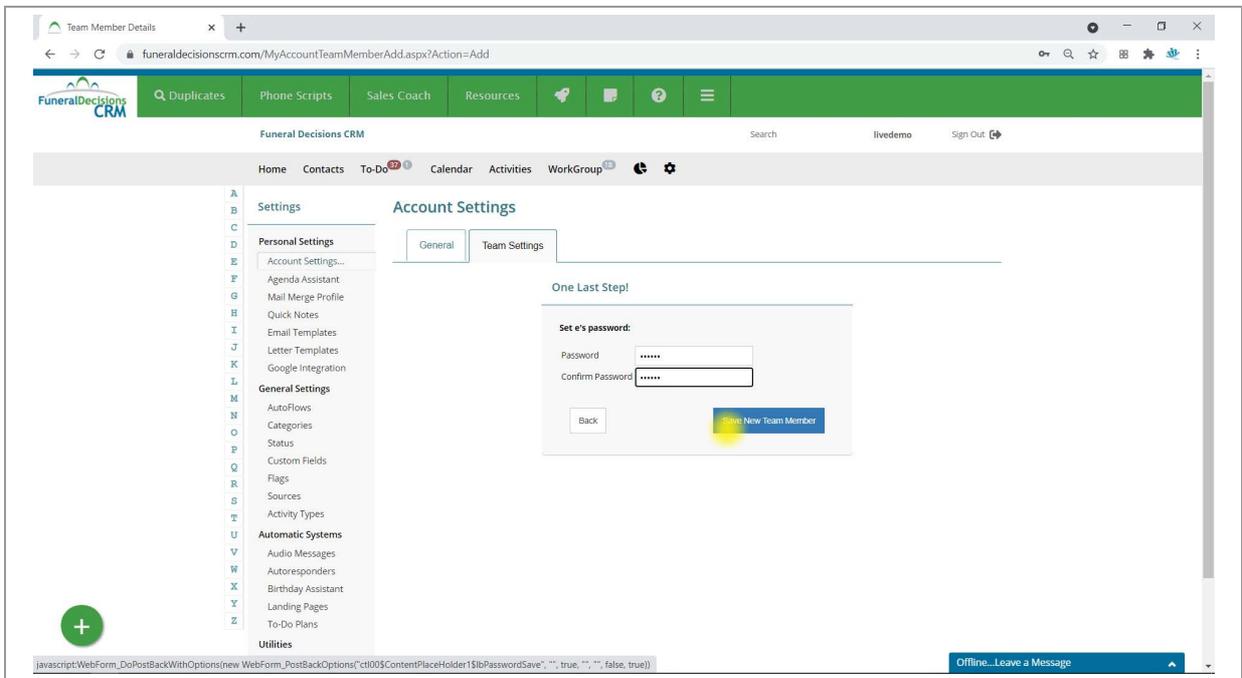
## User Type...



Select the user type for the new user by clicking the "Select" button next to the user type. In a typical situation you'll only be choosing "Administrator" for those you wish to have full access to all leads or "Independent User" for those users who should only see their own leads. If you have questions about the other types, please call us.

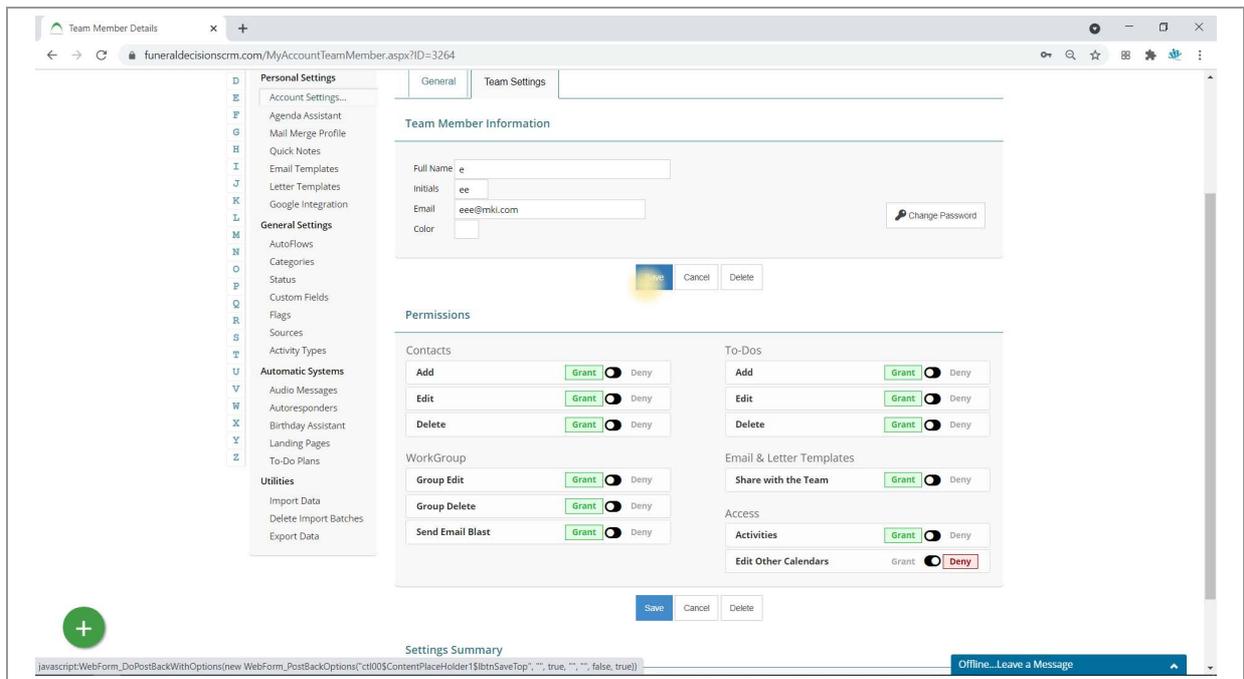


Now click the "Yes, Choose a Password"



Enter the desired password and click "Save New Team Member"

# Permissions



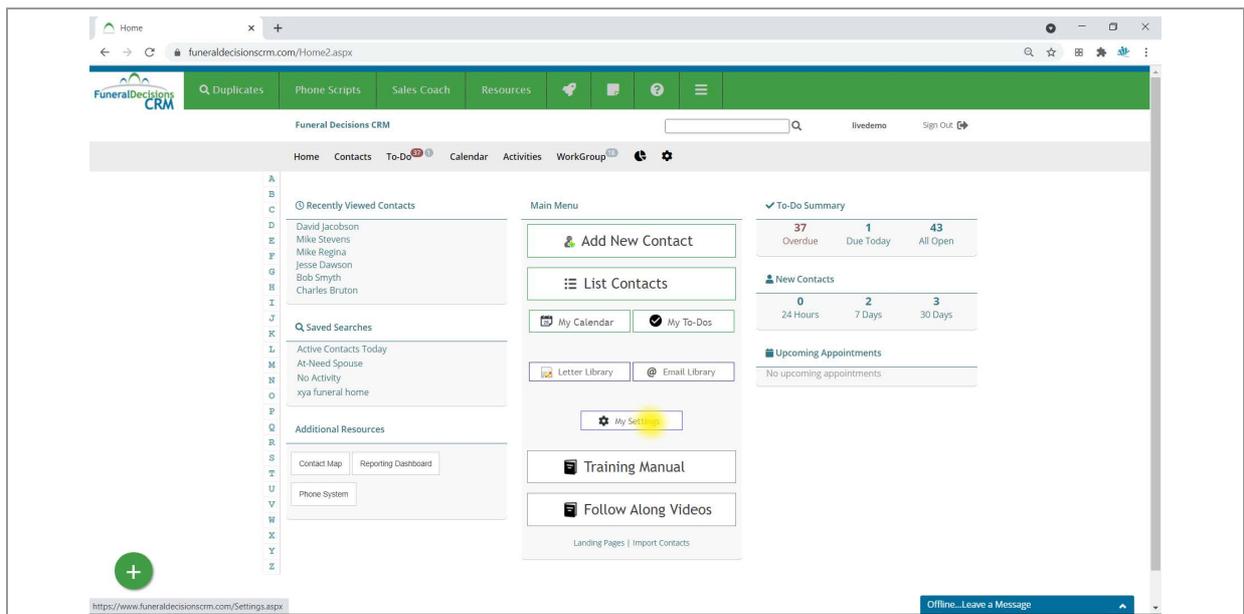
You can toggle specific permissions if needed for this user. We recommend keeping everything on, however there might be situations where you might want to turn off the ability to delete contacts and To-Dos.

Then click "Save"

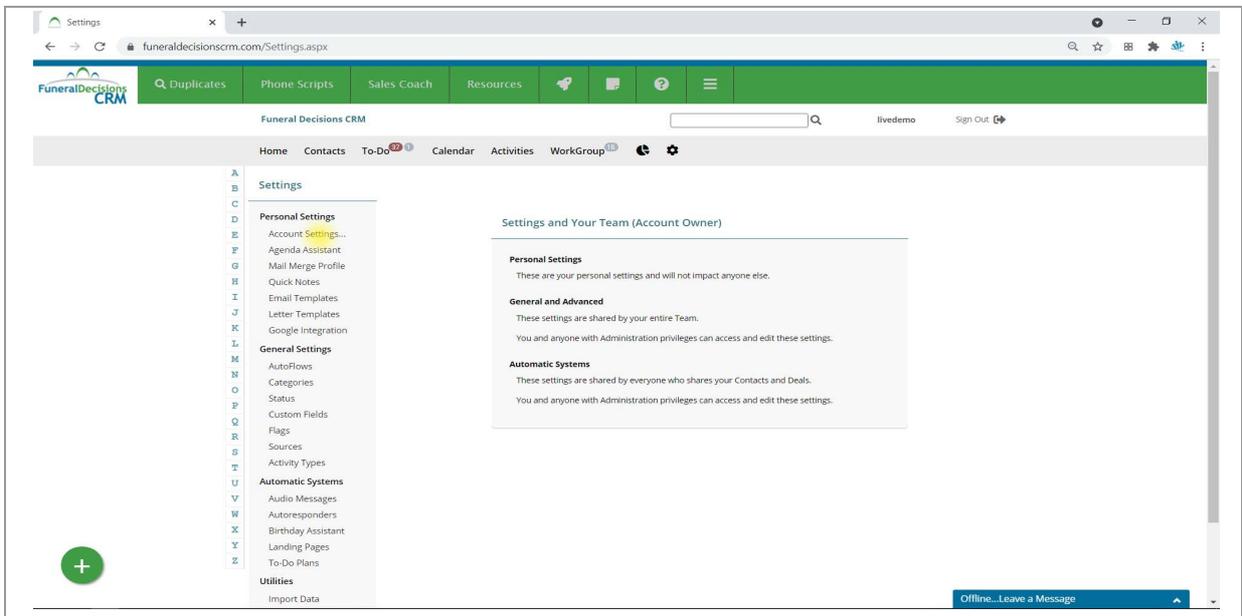
# Deleting Users

*FuneralDecisionsCRM*

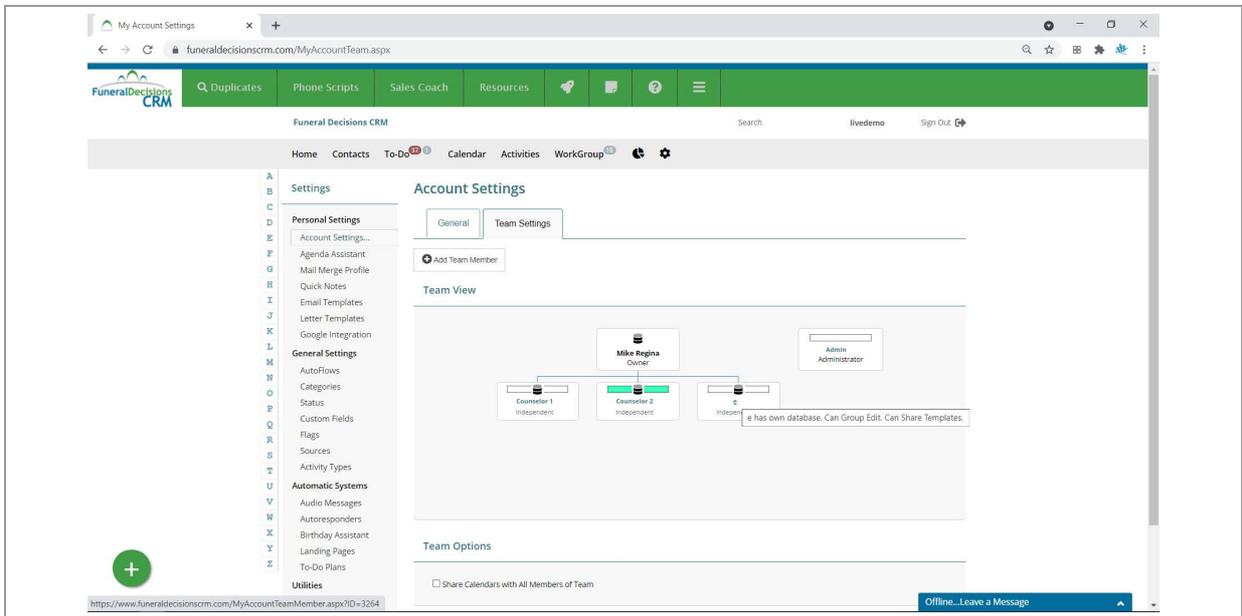
Delete an existing user



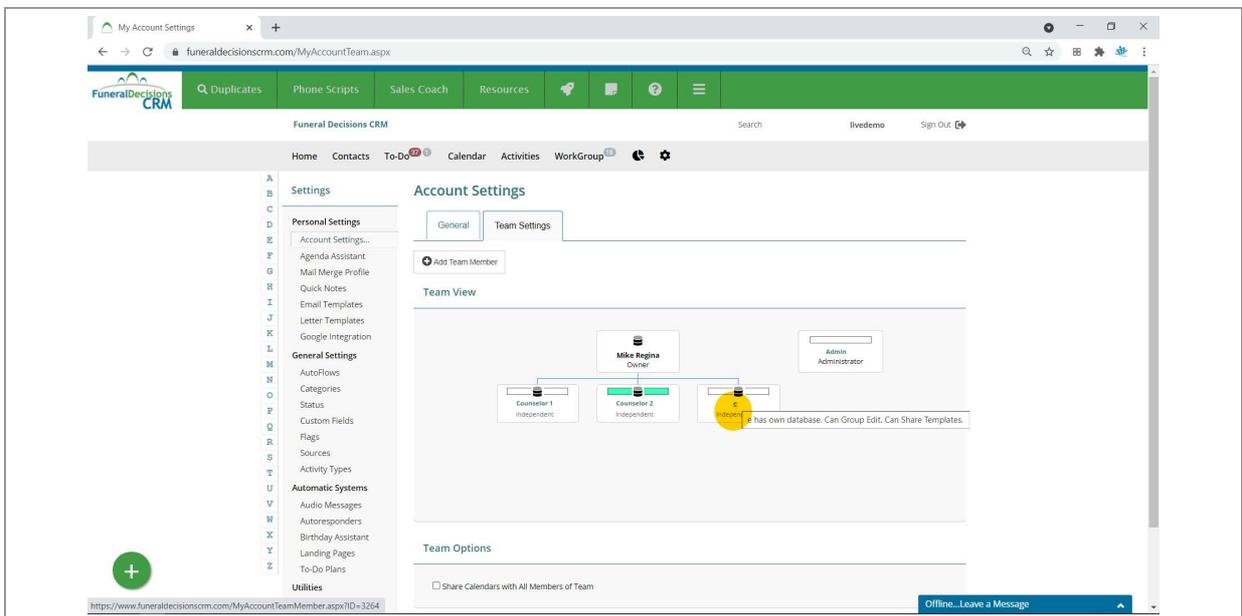
Click on "Settings"



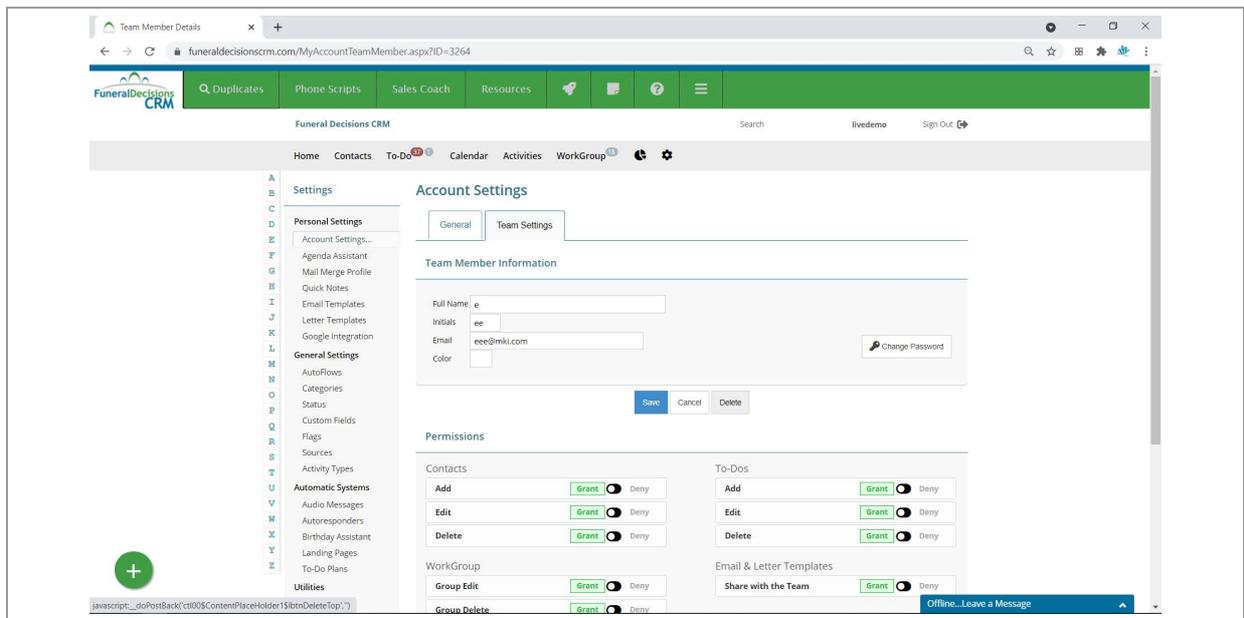
Click on "Account Settings..."



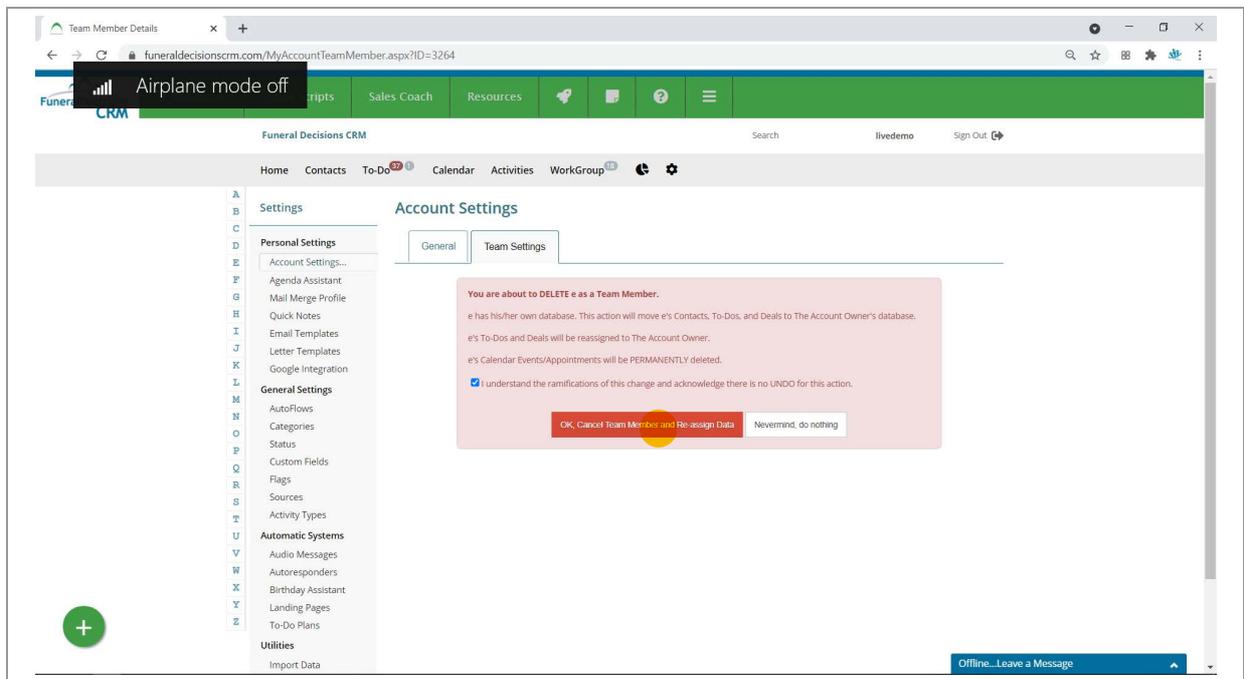
Click on "Team Settings"



Click on the user's name you wish to delete



Click on "Delete"



Check the "I understand the ramifications..." box and then click the "Ok, Cancel Team Member and Re-assign Data"

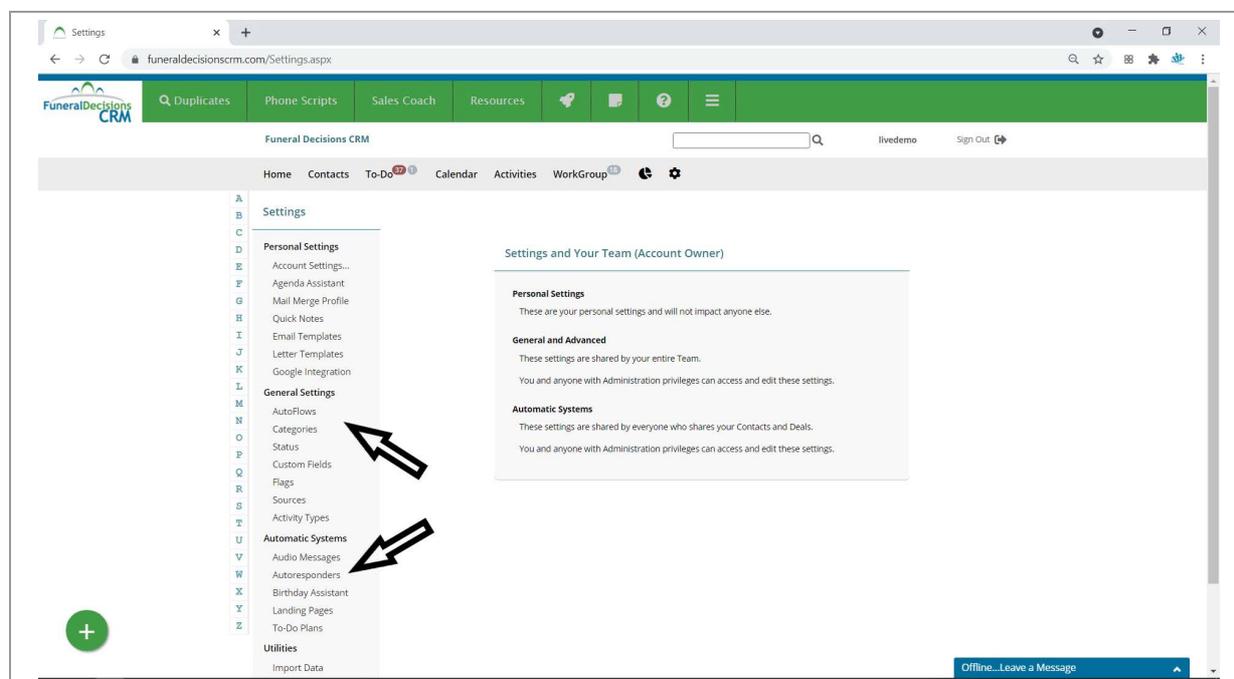
# System Automation (Administrator/Power User Level Users)

# What Is System Automation

FuneralDecisionsCRM

Get the system to do work for you.

In General...



FuneralDecisionsCRM offers a level of automation that enables you to off-load some of the work to the system. This automation is primarily around using emails. The first is AutoFlows, which allows any number of things to happen to a contact either through a manual launch of the AutoFlow or when someone clicks a link on an email. It can change status, add a flag, send new emails, turn off autoresponders, etc.

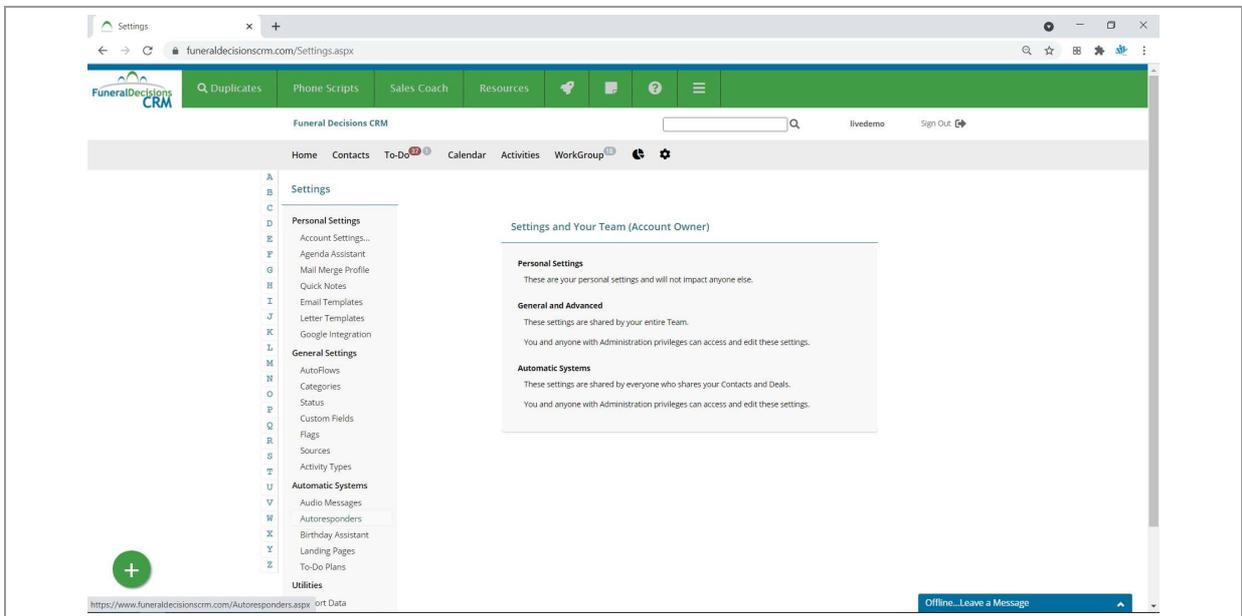
The second is the Autoresponder capability. The name of this is a little misleading, as its purpose isn't to automatically respond to someone like an "out of office" message does...although it can. The primary function is to automatically send out a series of prewritten emails in predetermined intervals automatically. A perfect example is an Aftercare/Grief follow up email series that goes out every week for an entire year. That's 52 emails, one every week.

## Create Autoresponder Campaigns

FuneralDecisionsCRM

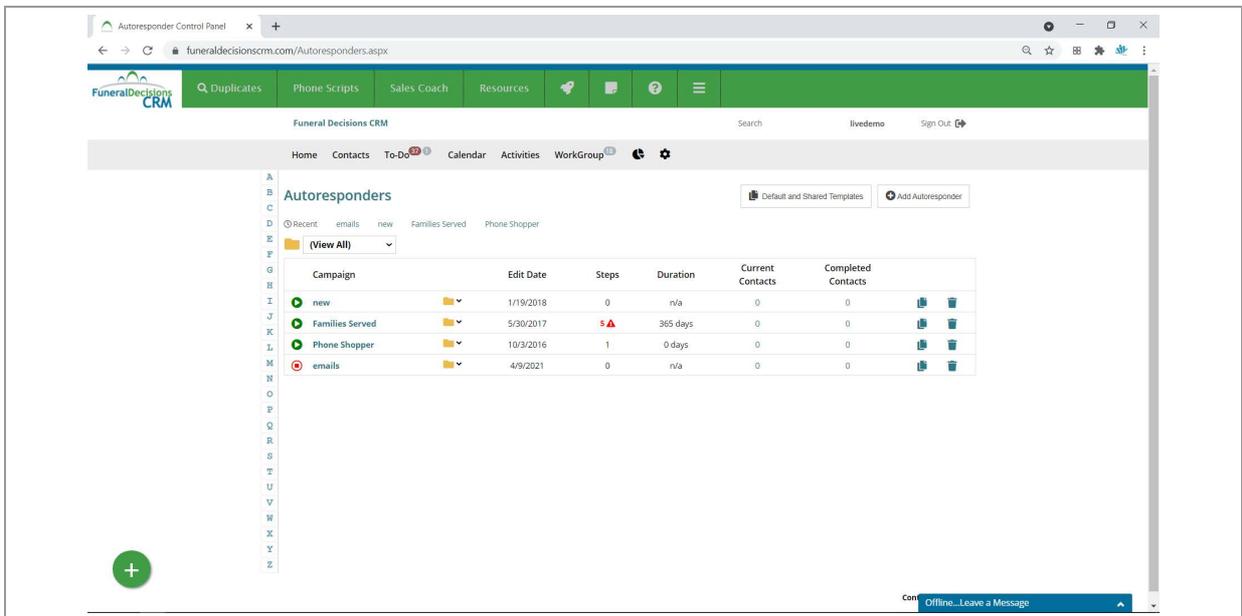
First we will cover Autoresponders. In order to use an autoresponder, you need to have an email or series of emails prewritten and stored in the Email Templates.

If you do not have your email or emails written, please do that first.

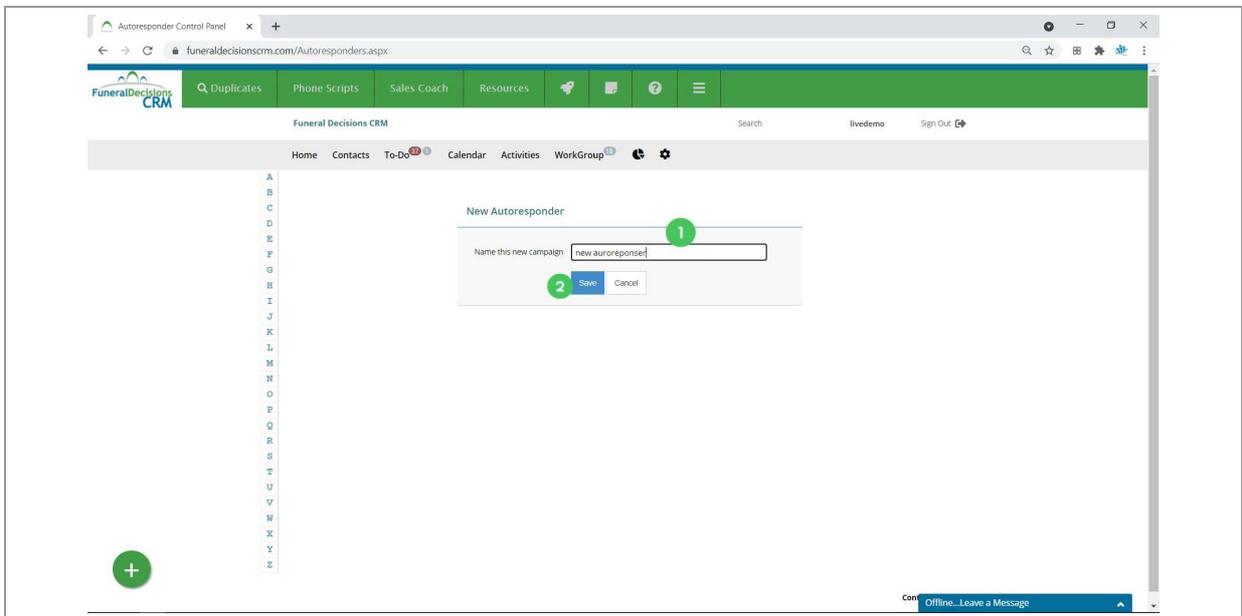


Click on "Autoresponders" from the "Home" screen.

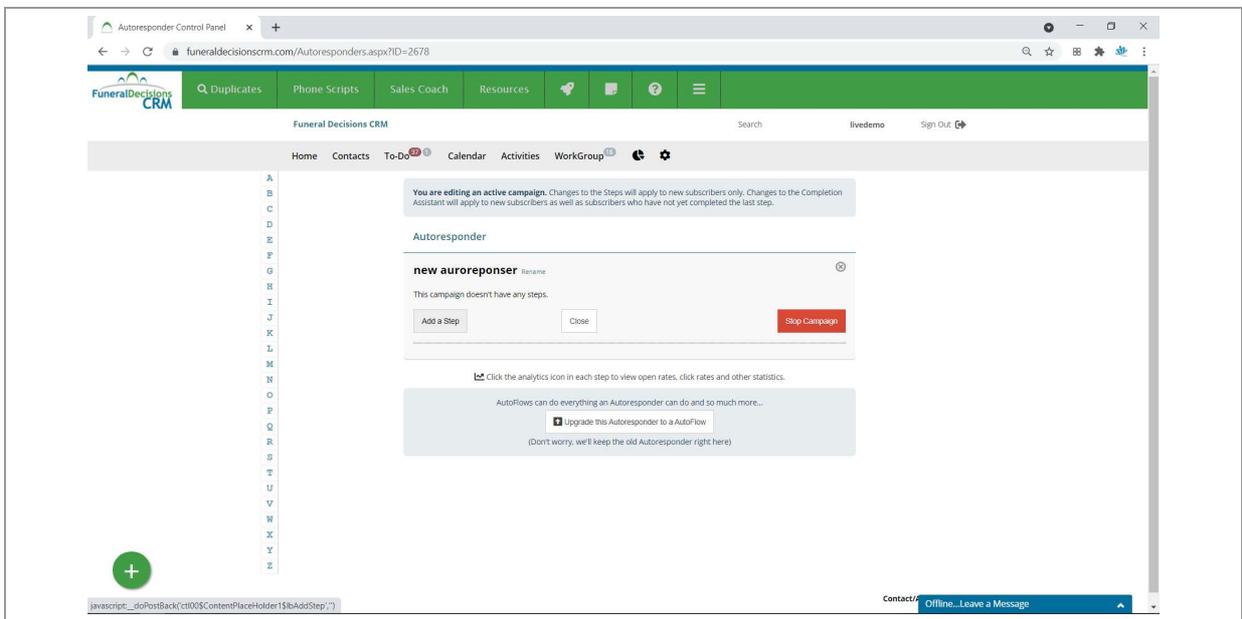
...you can also click "Settings" and access it via the settings menu.



Click on " Add Autoresponder"

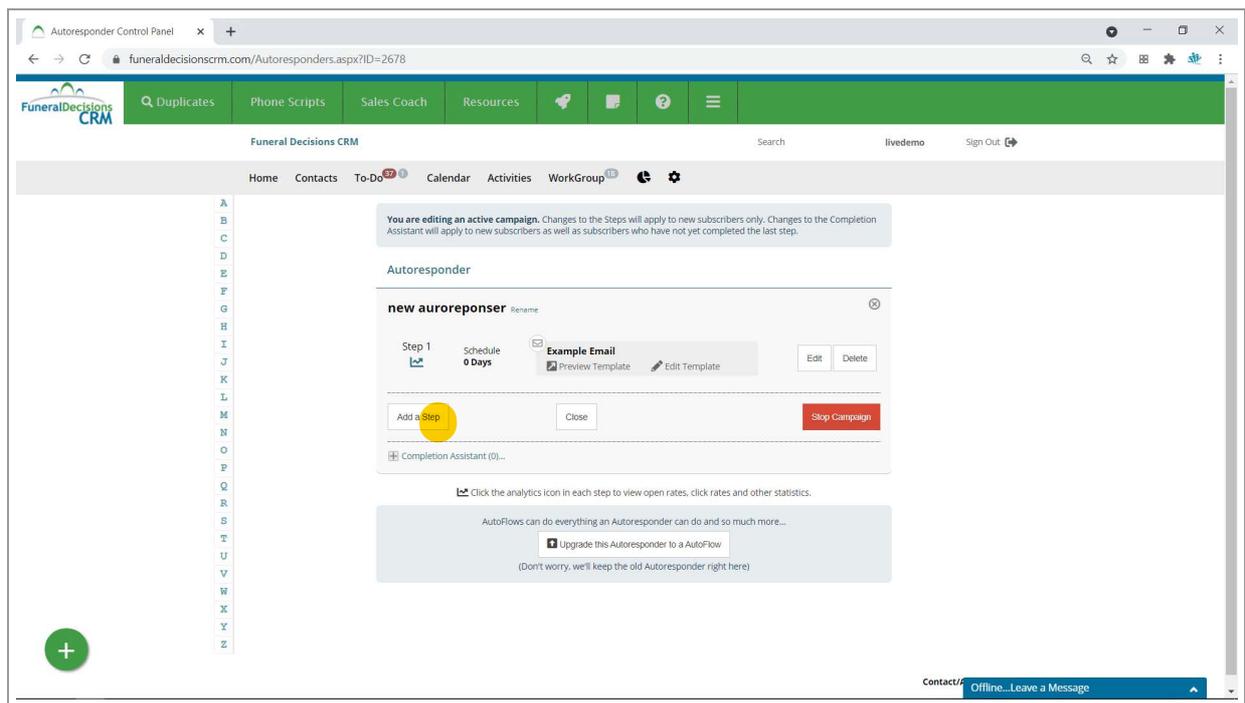


1. Type in the name of your Autoresponder campaign
2. Click on "Save"

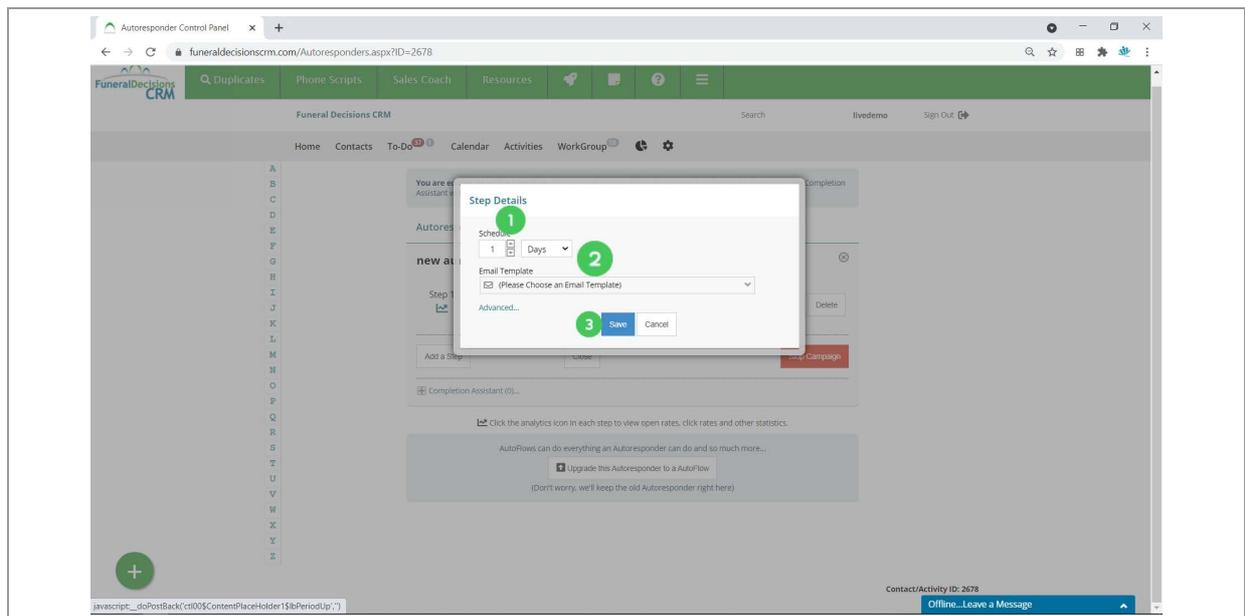


Click on "Add a Step"

1. Select what the initial delay should be. If you put "0" days it will go out the day you assign the autoresponder.
2. Select the email template that needs to go out. If you do not do this, your autoresponder will NOT work.
3. Click Save.



To add the second email, click "Add a Step"

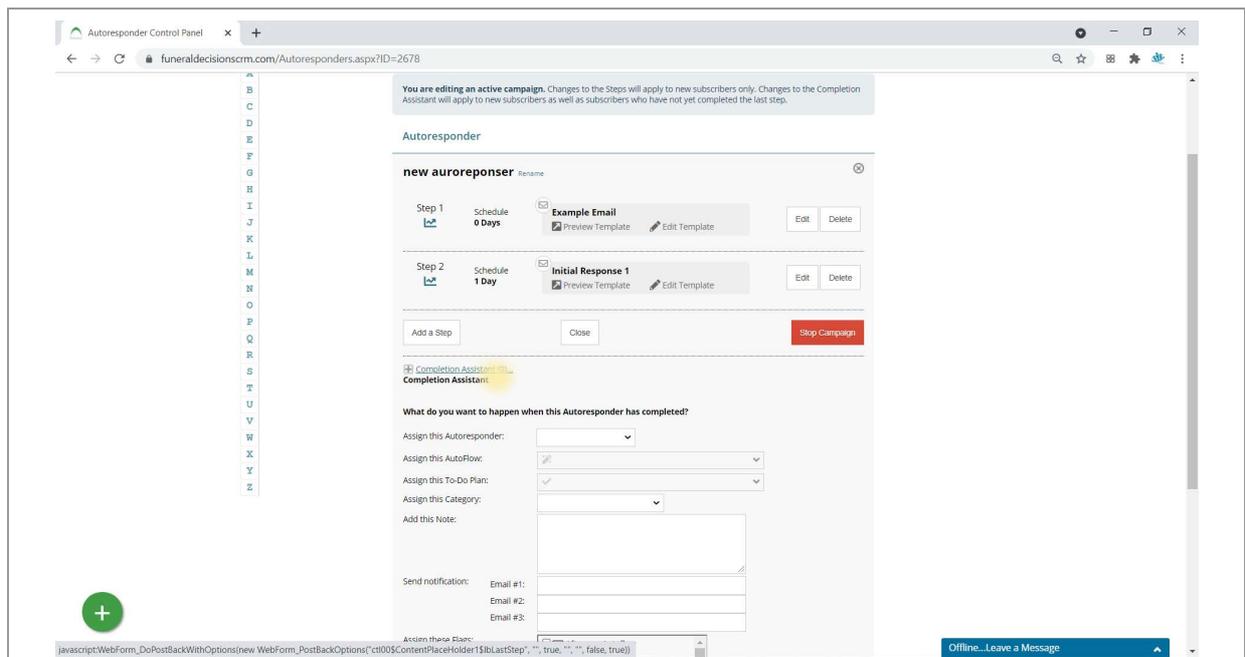


1. Select the interval for the next email. NOTE: The interval is from when the autoresponder is first turned on for a contact and not from the previous email. So for example, if you have 7 emails that should go out every day, you would not put "1 Days" down for the schedule for all seven emails. You would put 1 down for the first, 2 down for the second, 3 down for the third, and so on. Just remember, the interval is NOT from the previous email sent, it is from the date the autoresponder is initially turned on.

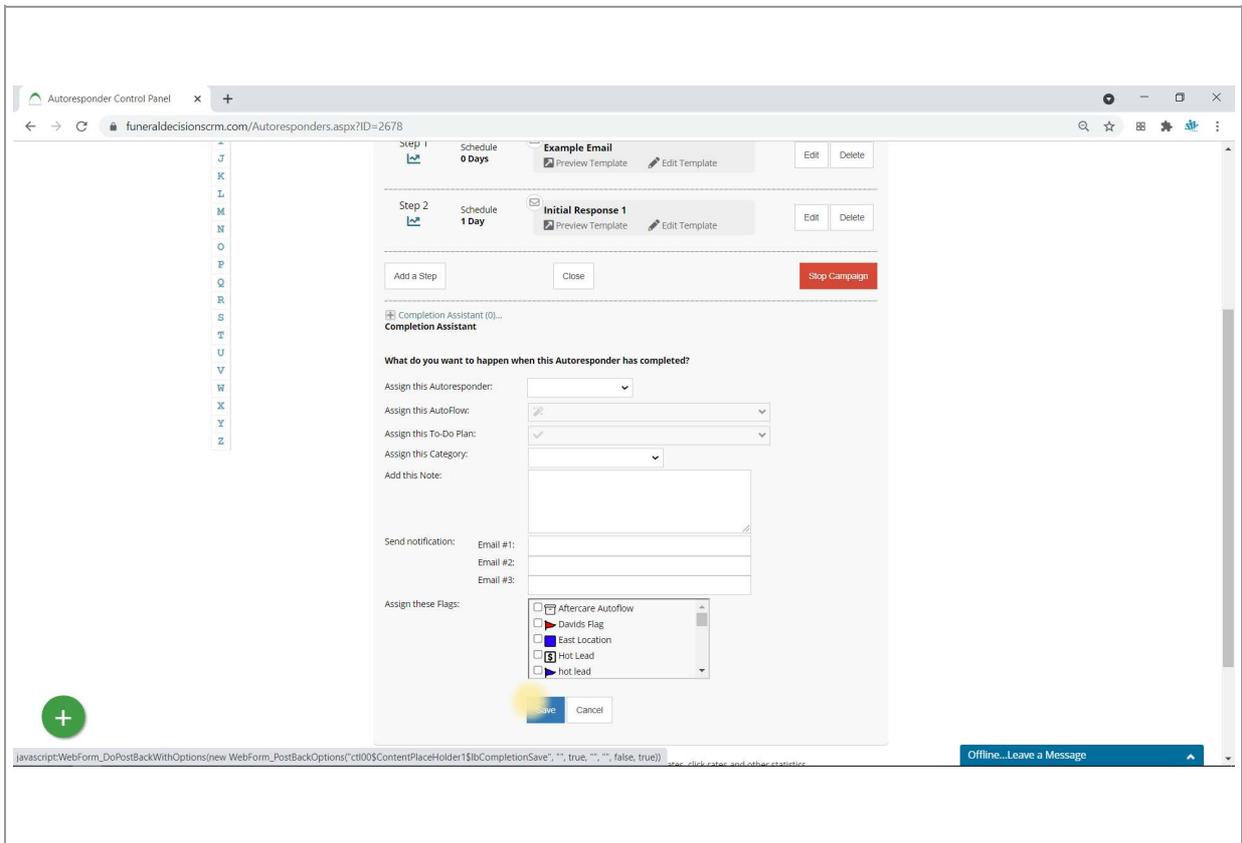
2. Select the email template.
3. Click Save.

Repeat the steps as needed...

## Completion Assistant...

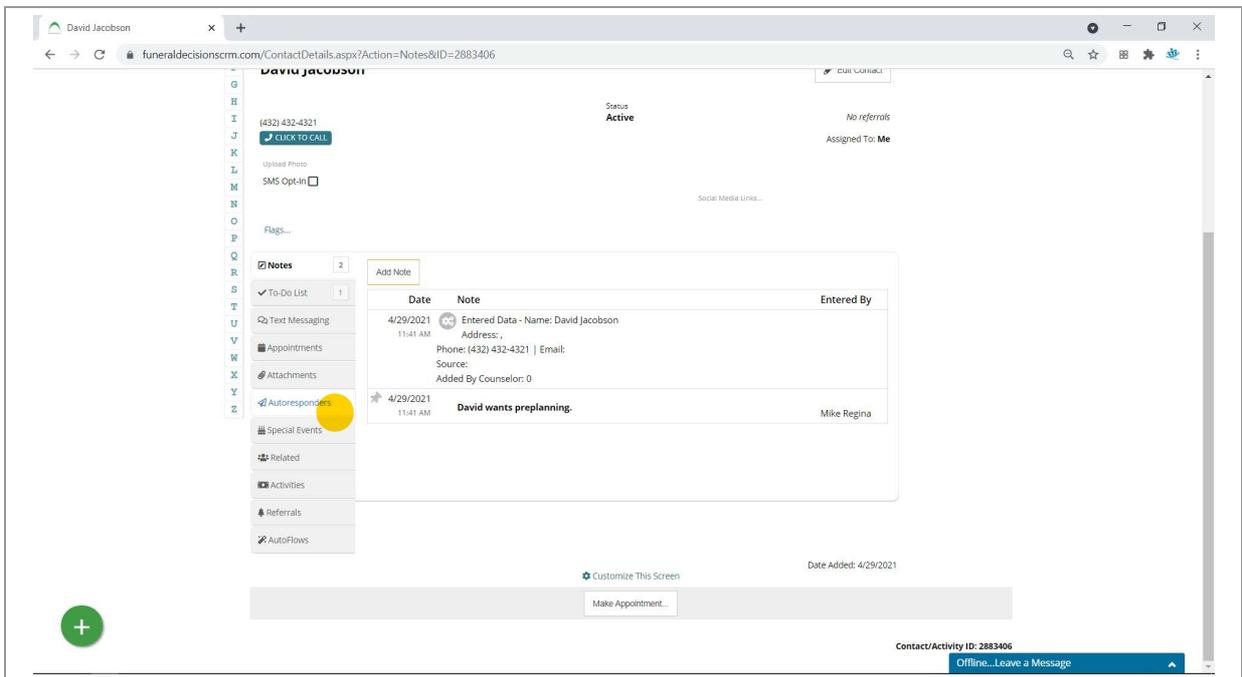


The "Completion Assistant" allows the system to turn on another autoresponder, assign a to-do plan, change the category, add a note, send a notification email to you, or add flags to the contact once the entire series has been sent out. To enable this, click on the "Completion Assistant" link below the "Add a Step" button.

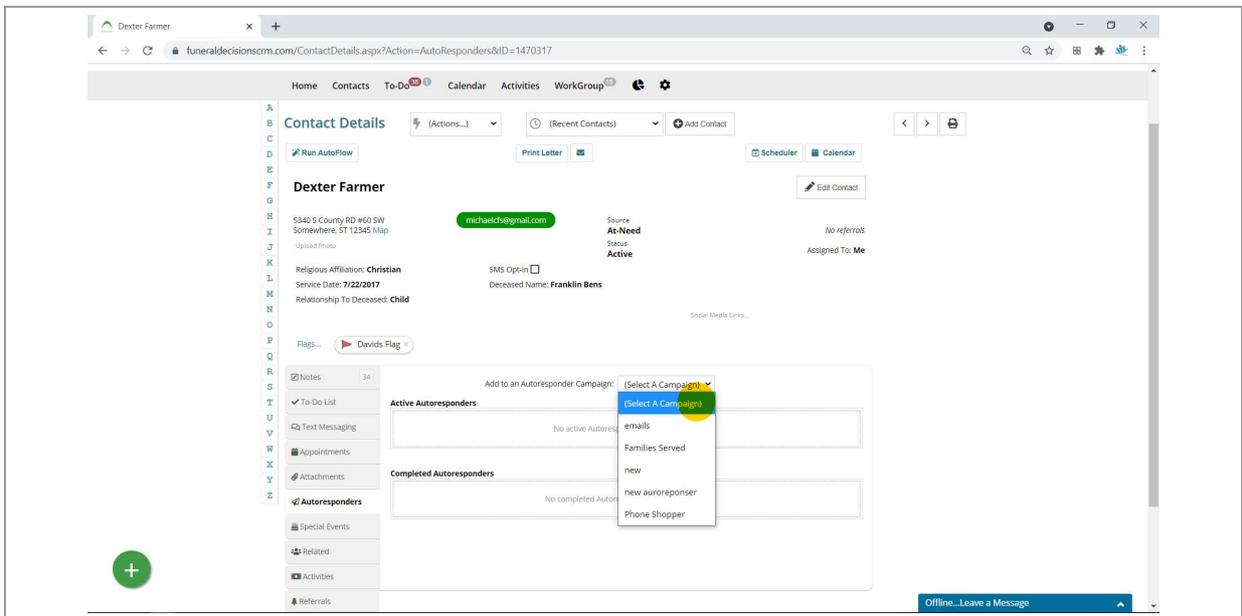


Select what you would like the "Completion Assistant" to do and click the "Save" button.

## To Turn On an Autoresponder for a Contact



Go into the contact record you wish to have on a campaign and click on the "Autoreponders" tab



From the drop down menu, select the campaign you wish to run for the contact.

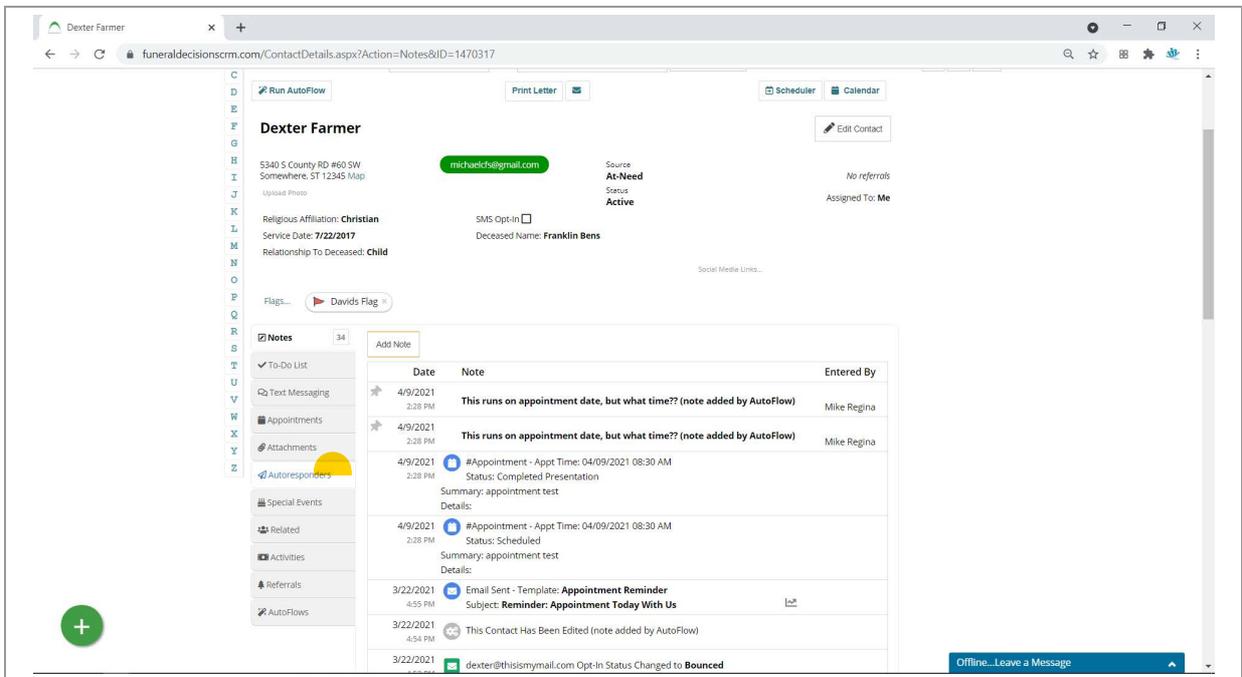
...and that's it!

# Launch An Autoresponder Campaign

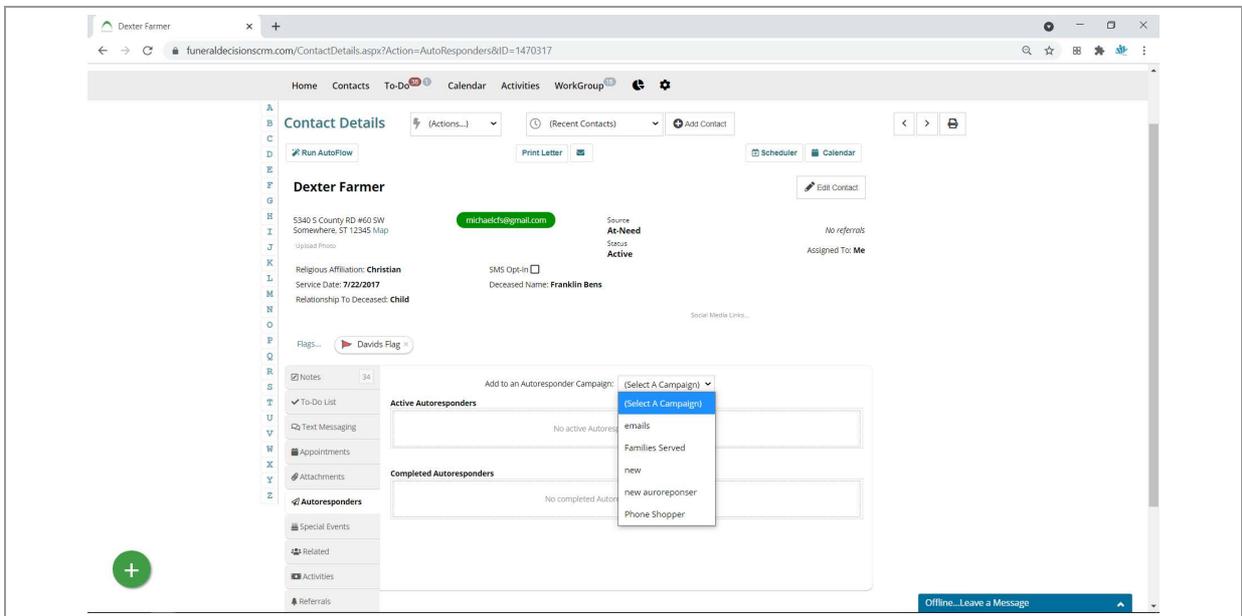
FuneralDecisionsCRM

Launch an autoresponder

## To Turn On an Autoresponder for a Single Contact



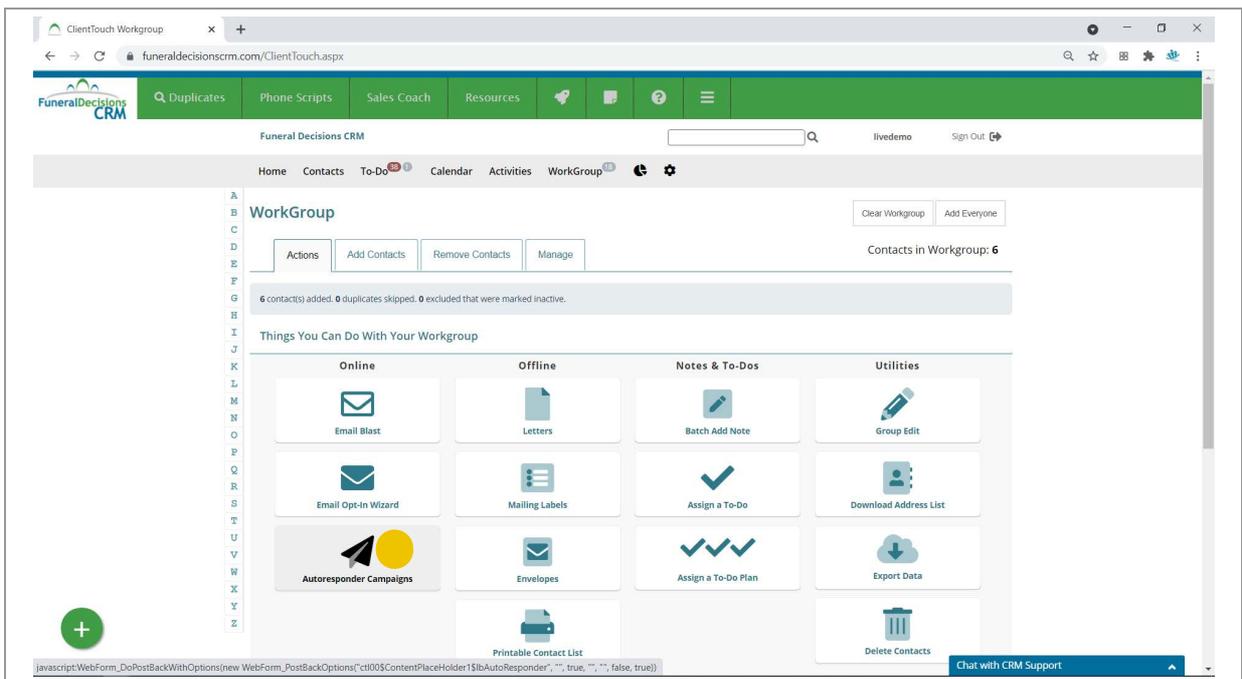
Go into the contact record you wish to have on a campaign and click on the "Autoresponders" tab



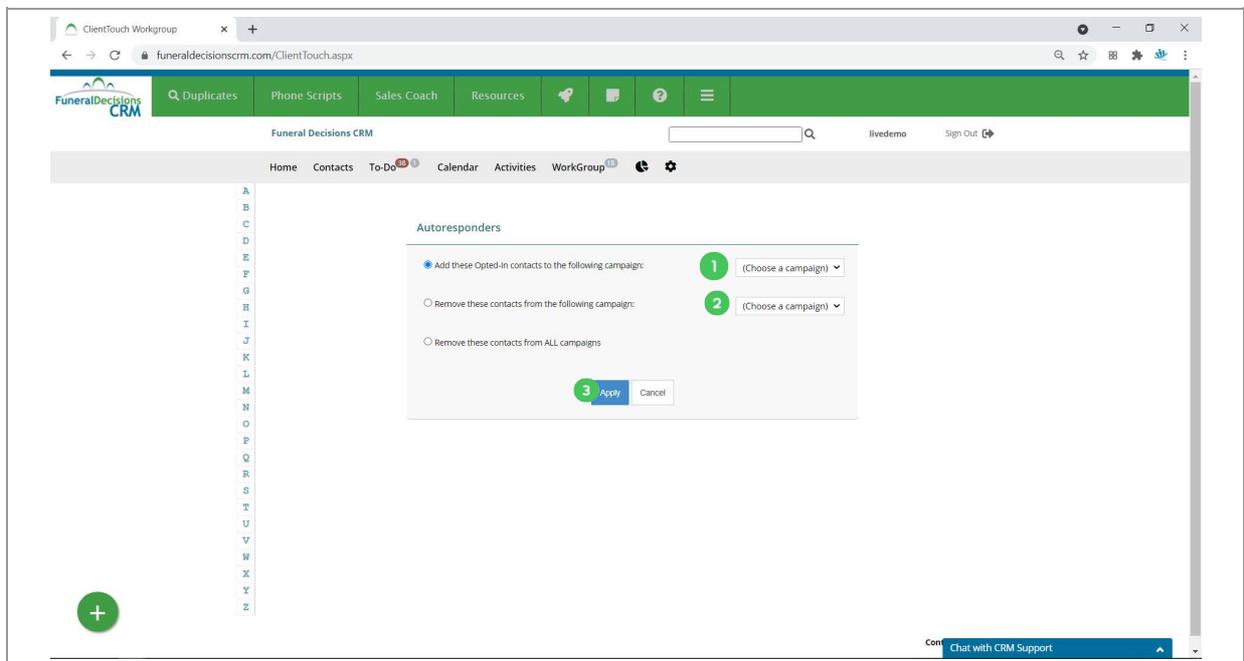
From the drop down menu, select the campaign you wish to run for the contact.

...and that's it!

## Put a Group of Contacts on a Campaign



1. Filter your contacts as needed (see tutorial on filtering if needed) and add to ClientTouch
2. Click on "Autoreponder Campaigns"



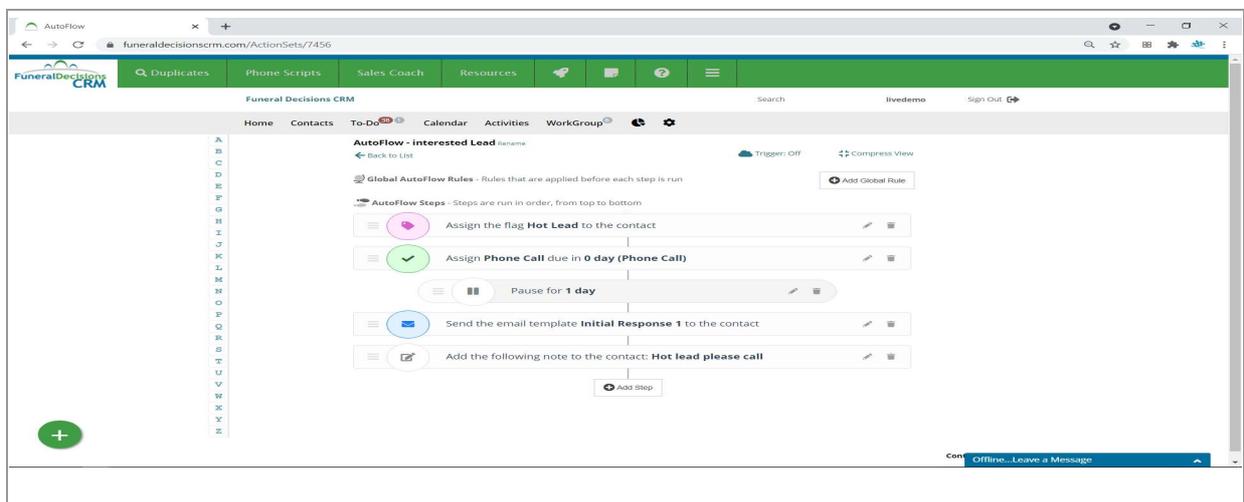
Then select the campaign name from the drop down (or likewise, remove them from a campaign) and click "Apply".

# What is an AutoFlow

*FuneralDecisionsCRM*

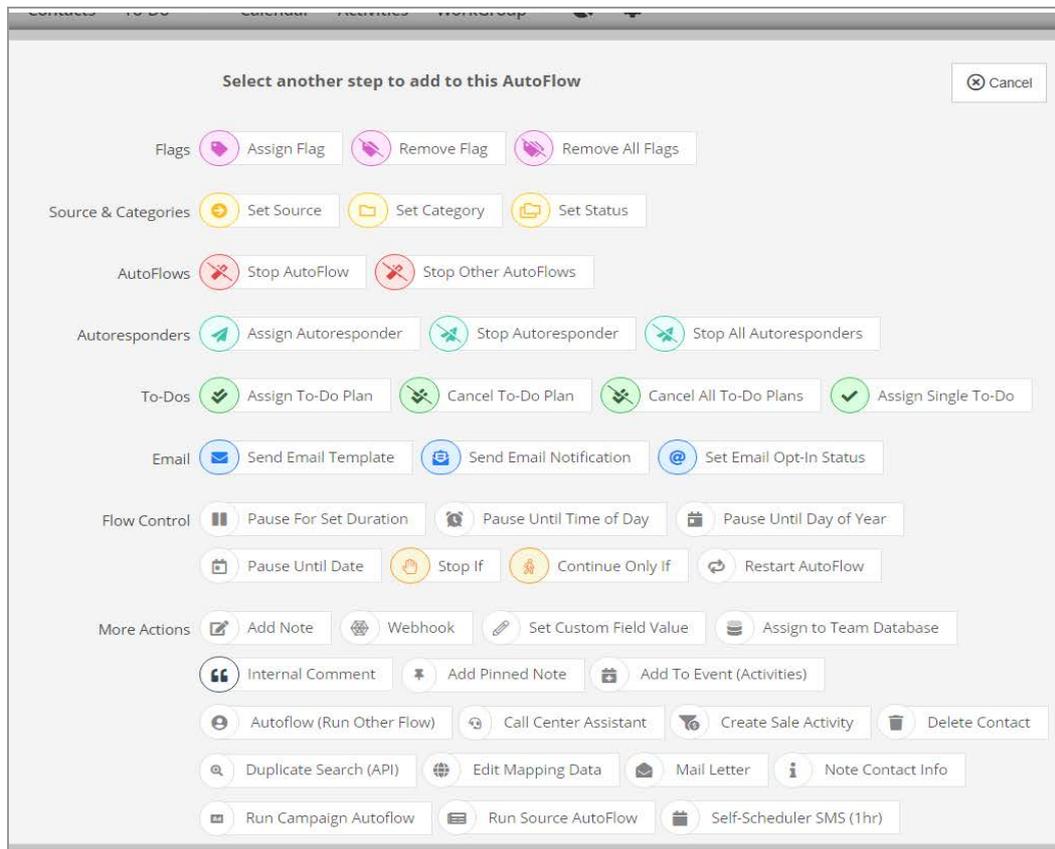
AutoFlows are a great way to maximize system resources and automation tools.

## About AutoFlows...



AutoFlows are a portion of system automation that enables a series of actions to be applied to a contact or a group of contacts via a manual launch or from a link click on an email (see intelligent links).

## What Can AutoFlows Do?



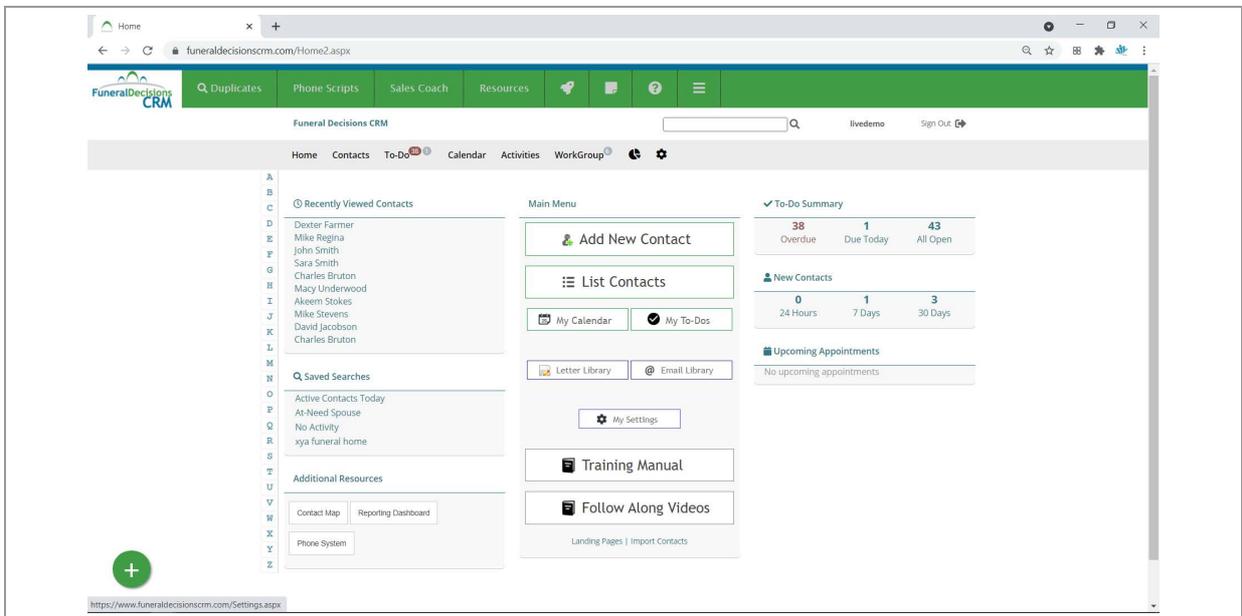
When you are adding a step to an AutoFlow you can do any of the following to a contact plus more:

1. Assign a specific flag
2. Remove a specific flag
3. Remove all flags
4. Change the Source
5. Change the Category
6. Change the Status (via Category 2)
7. Assign a specific Autoresponder
8. Stop a specific Autoresponder
9. Stop all Autoresponders
10. Assign a specific To-Do Plan
11. Cancel a specific To-Do Plan
12. Cancel all To-Do Plans
13. Assign a single one-time To-Do
14. Send an Email (from your template library) to the contact
15. Send an email notification to yourself or someone else.
16. Set the contact's Opt-In status
17. Add a Note to the contact record
18. Pause or delay before the next step by minutes, hours, days or weeks
19. Stop other AutoFlows

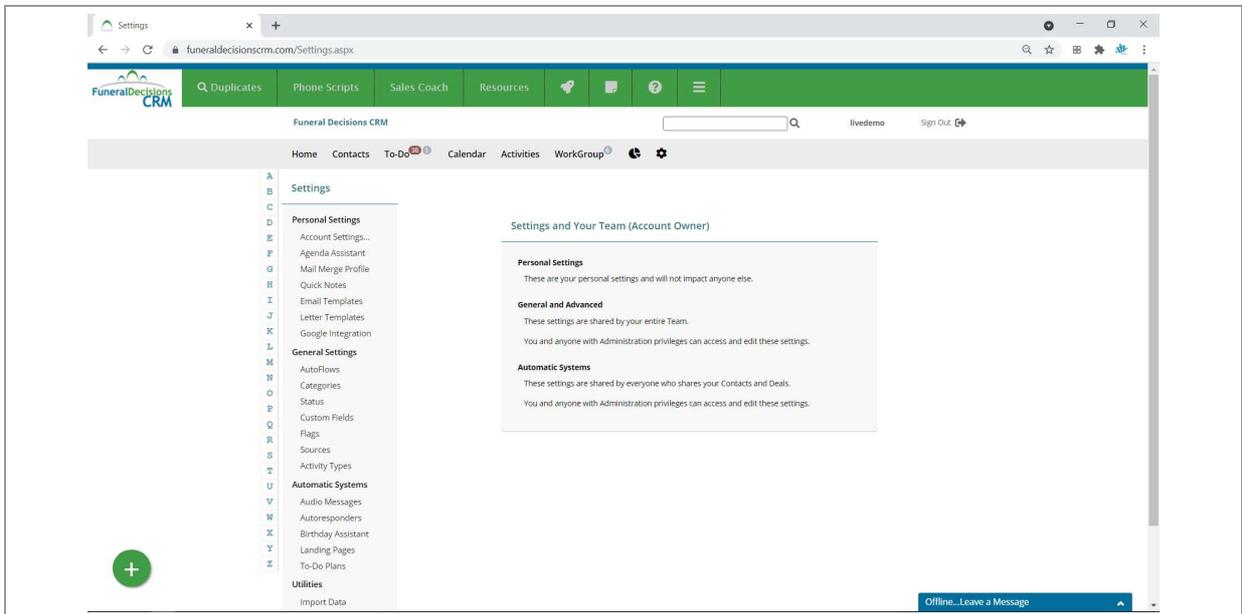
## Building an AutoFlow

*FuneralDecisionsCRM*

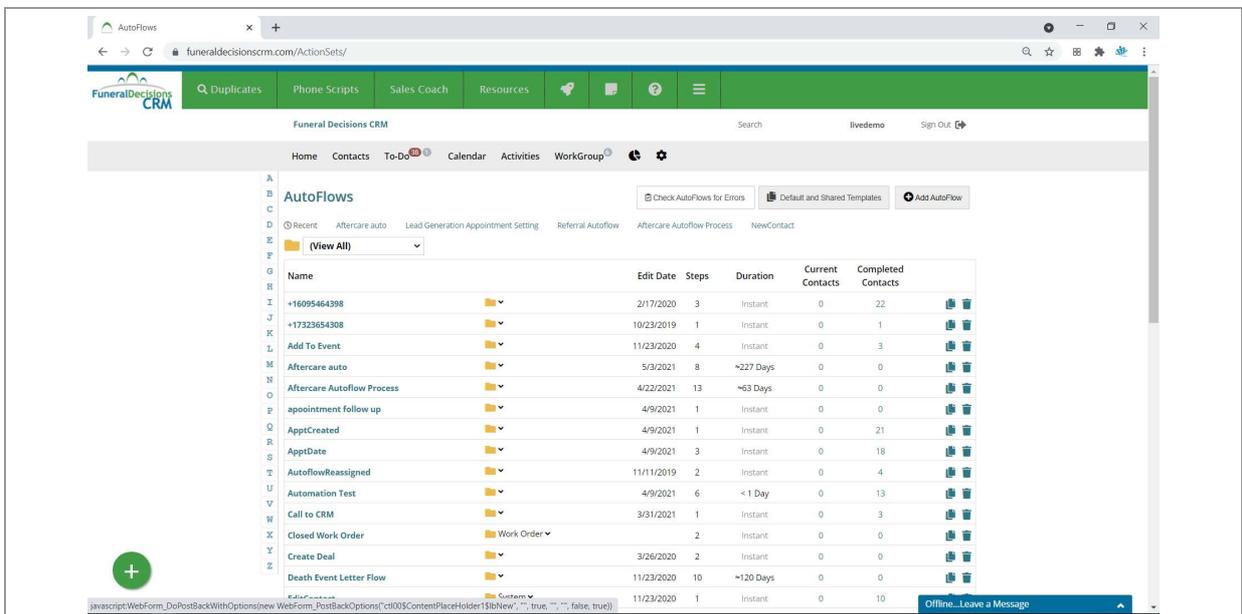
Build automation into your system



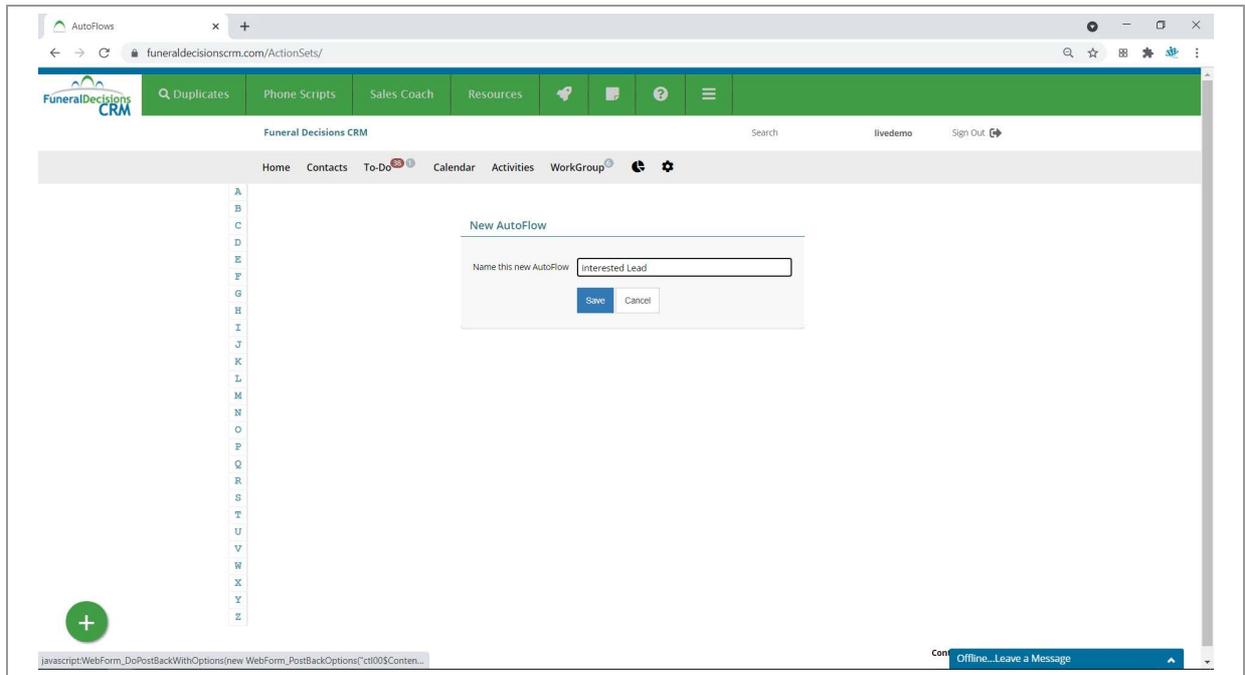
Click on "Settings"



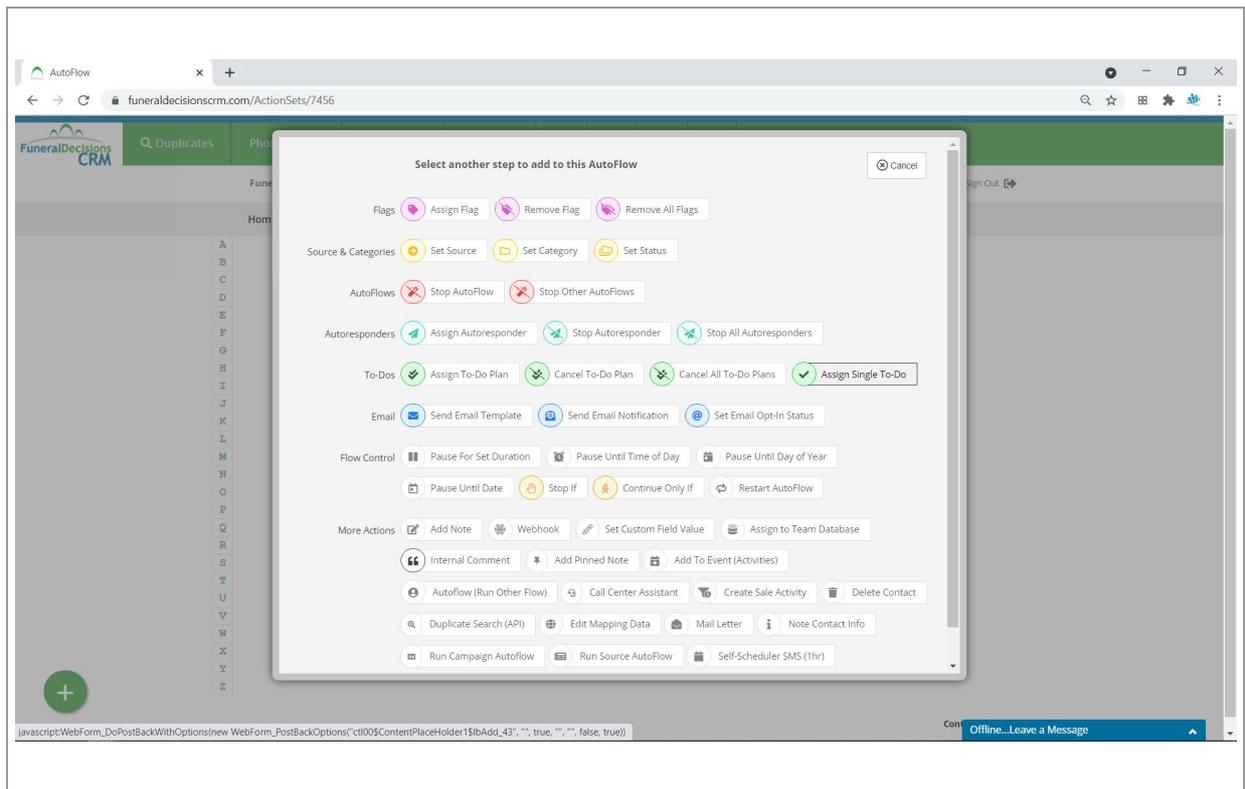
Click on "AutoFlows"



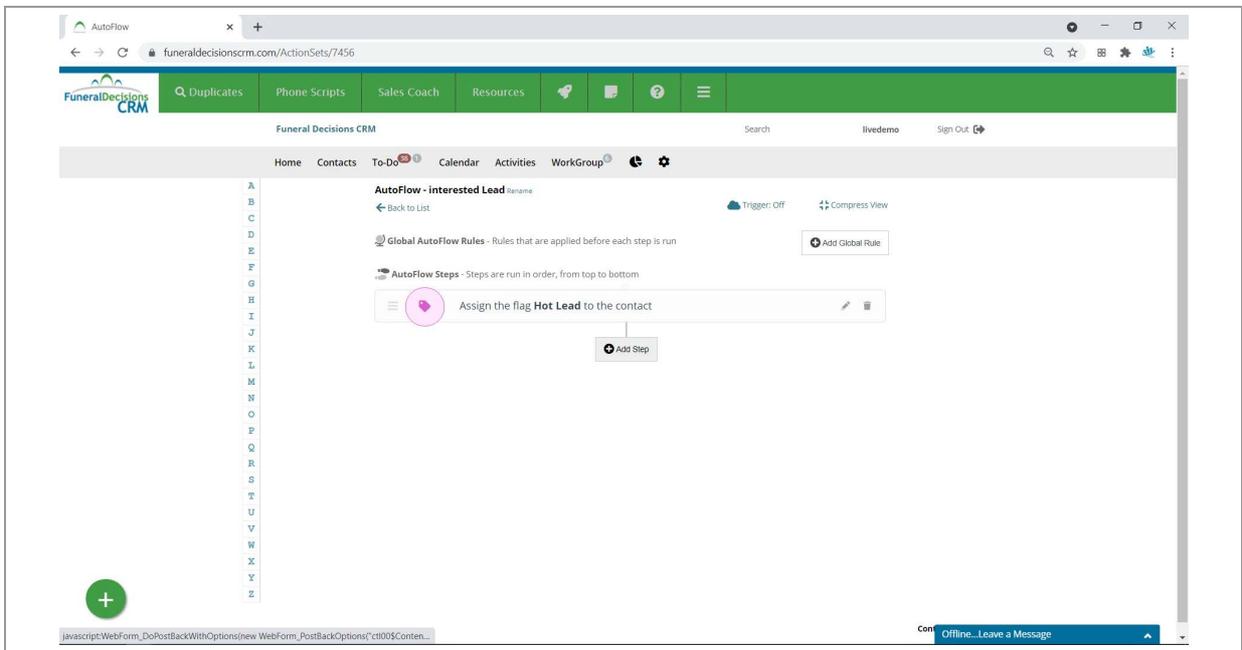
Click on " Add AutoFlow"



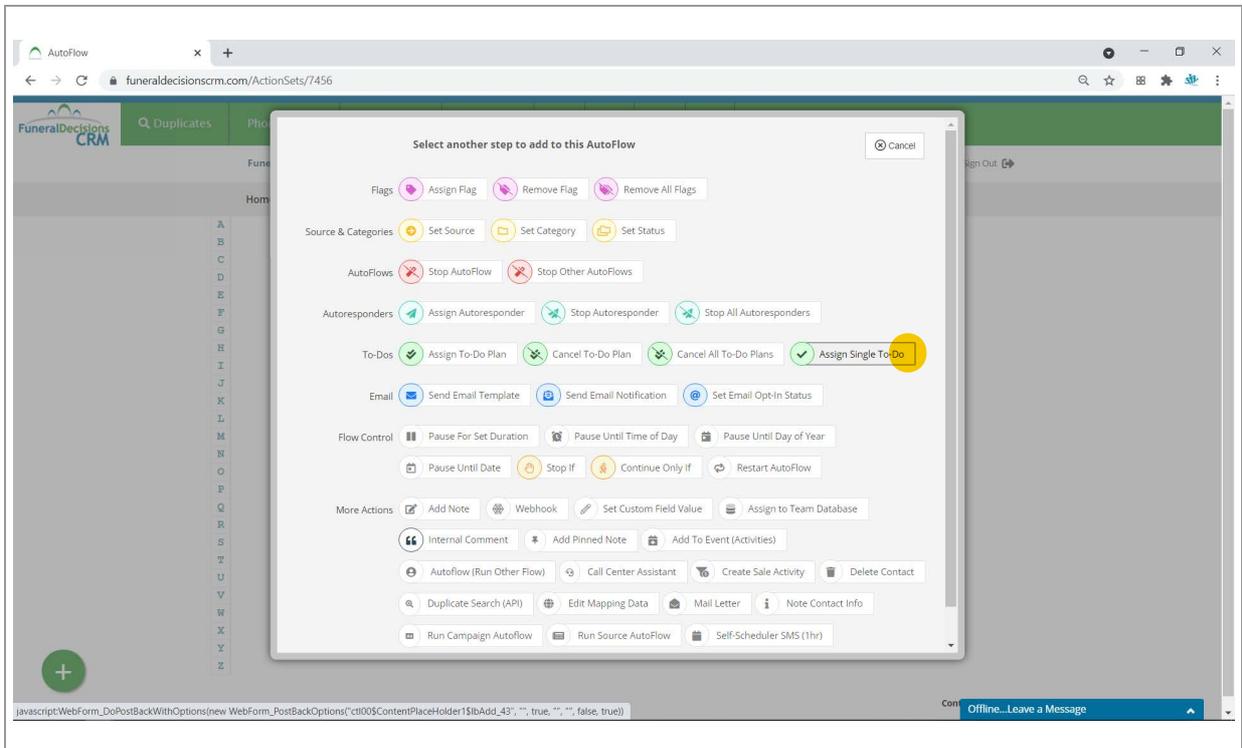
Enter the name of your AutoFlow and then click "Save".



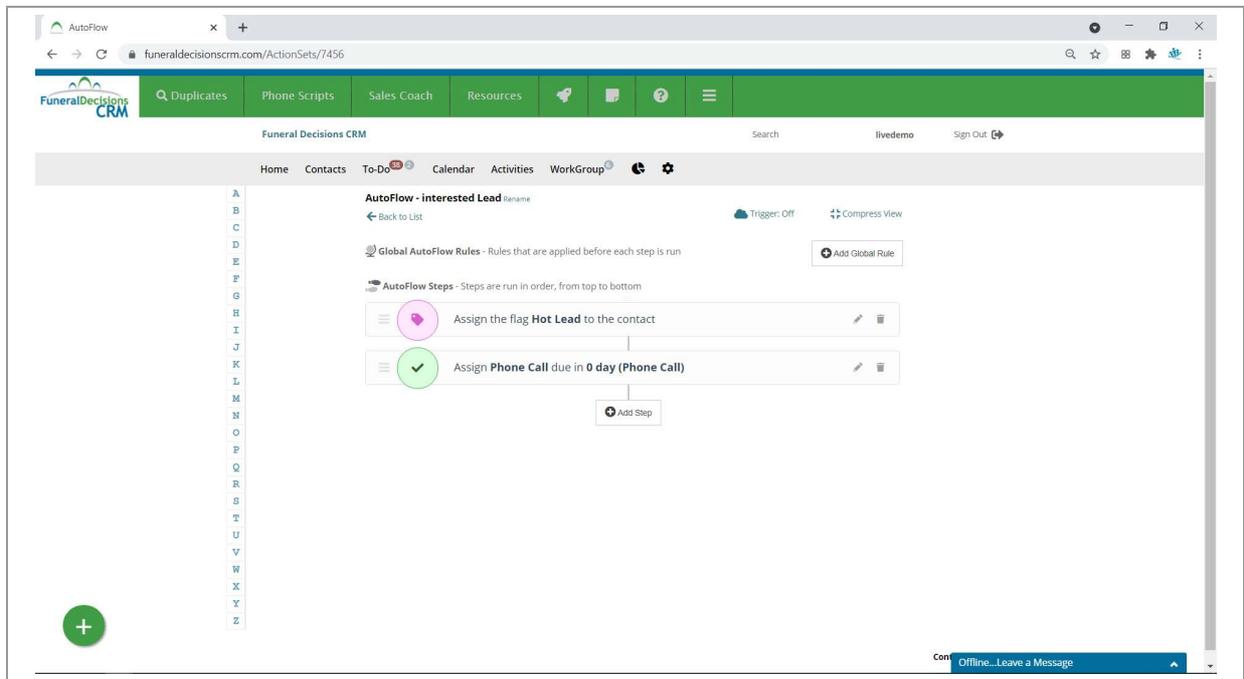
Click on the first action that you would like to be applied to the contact when the AutoFlow is run (either manually or via Intelligent Link...this example will be for an Intelligent Link).



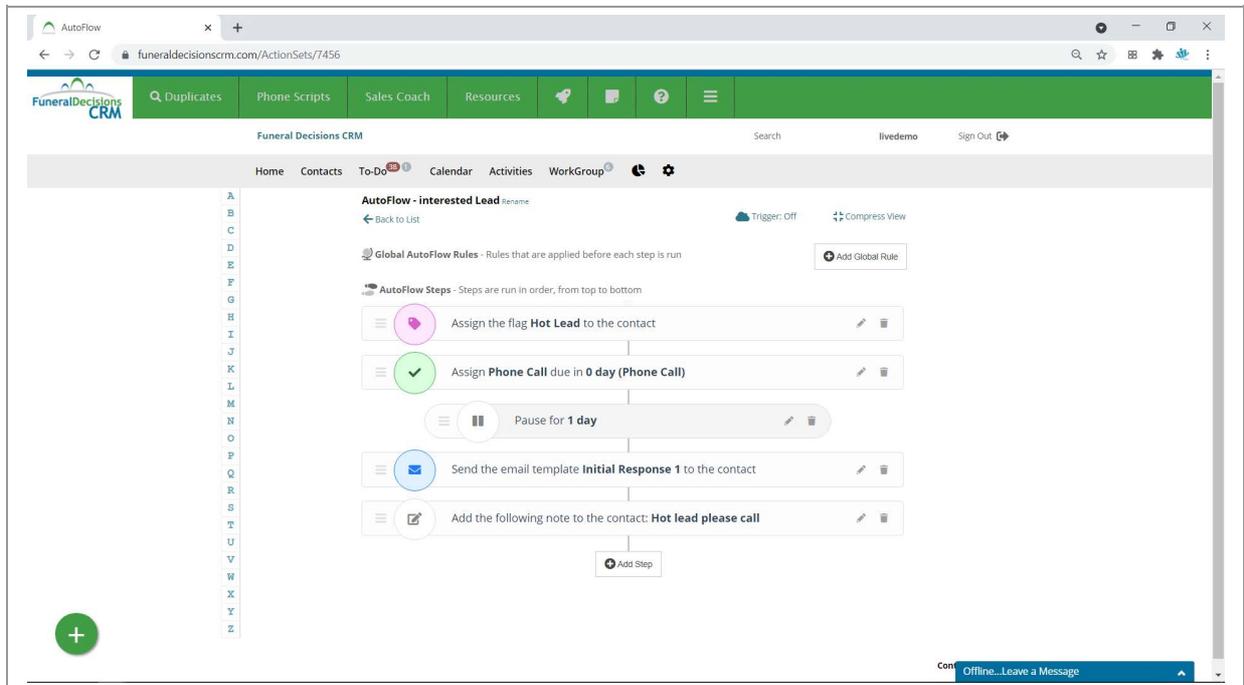
Once your first action is added, click "Add Step" to add another action.



Click on the next action you would like...



Continue adding steps until your AutoFlow is complete.



Once your AutoFlow is complete click the "Back to List" link.

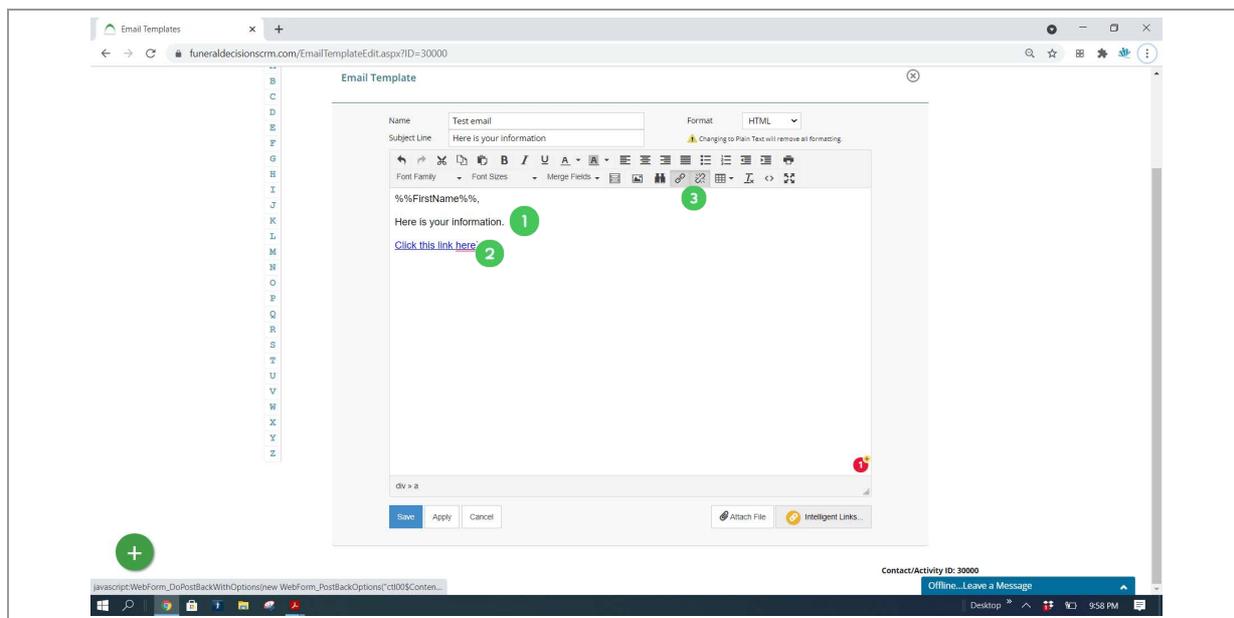
You can now launch your AutoFlow with an Intelligent Link or manually.

## Use Intelligent Links and AutoFlows

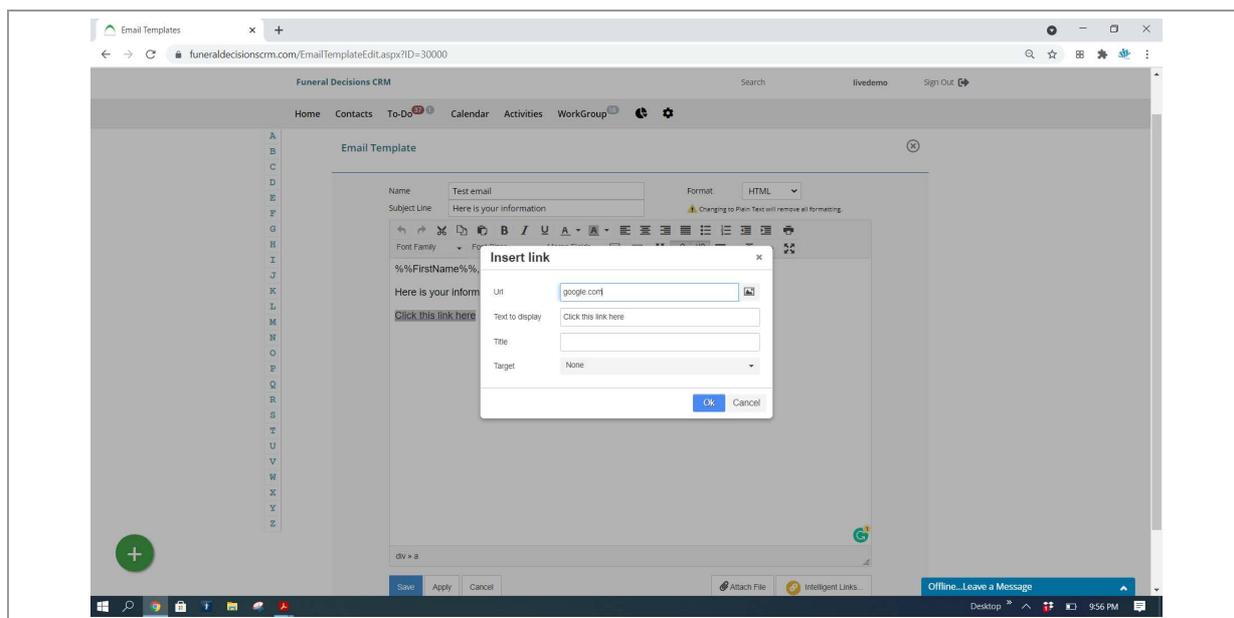
*FuneralDecisionsCRM*

Intelligent links are a great way to use AutoFlows in the system via link clicks in an email. Say for instance that you want to be alerted the second a person clicks on the link to the GPL that you sent them and flags them as being a 'hot lead'. This is what intelligent links do by launching a predefined AutoFlow.

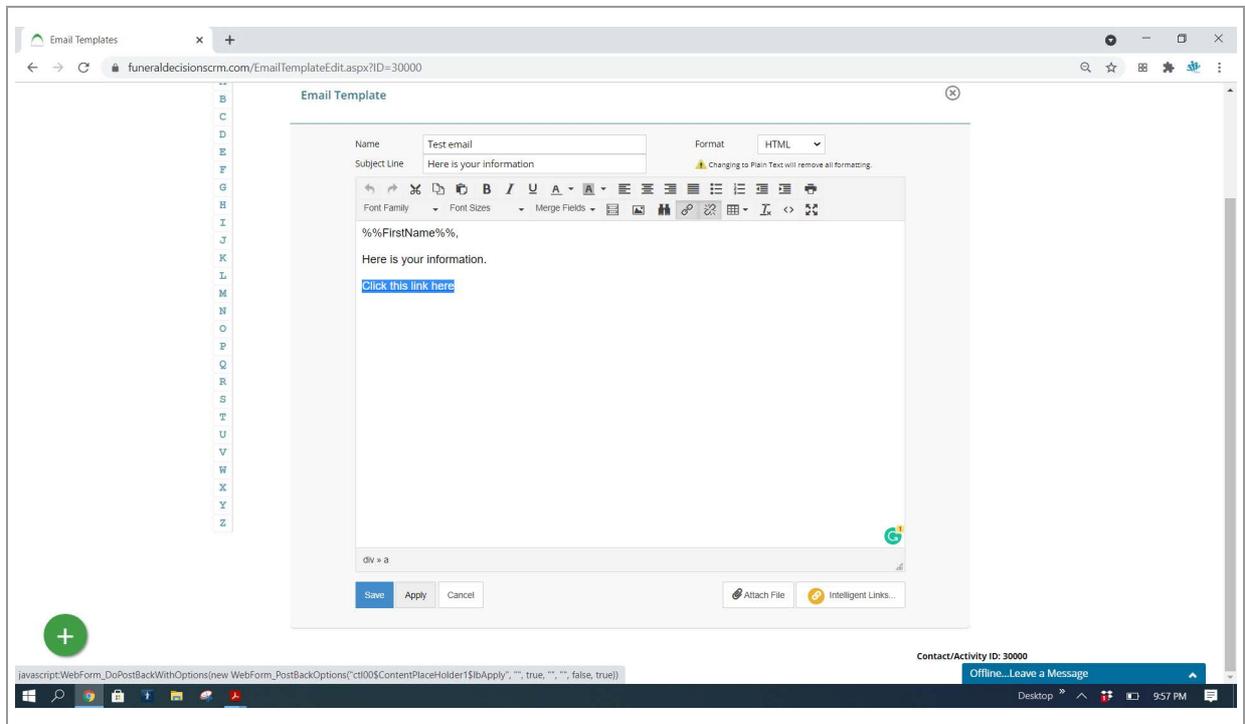
## Add an Intelligent Link to your template...



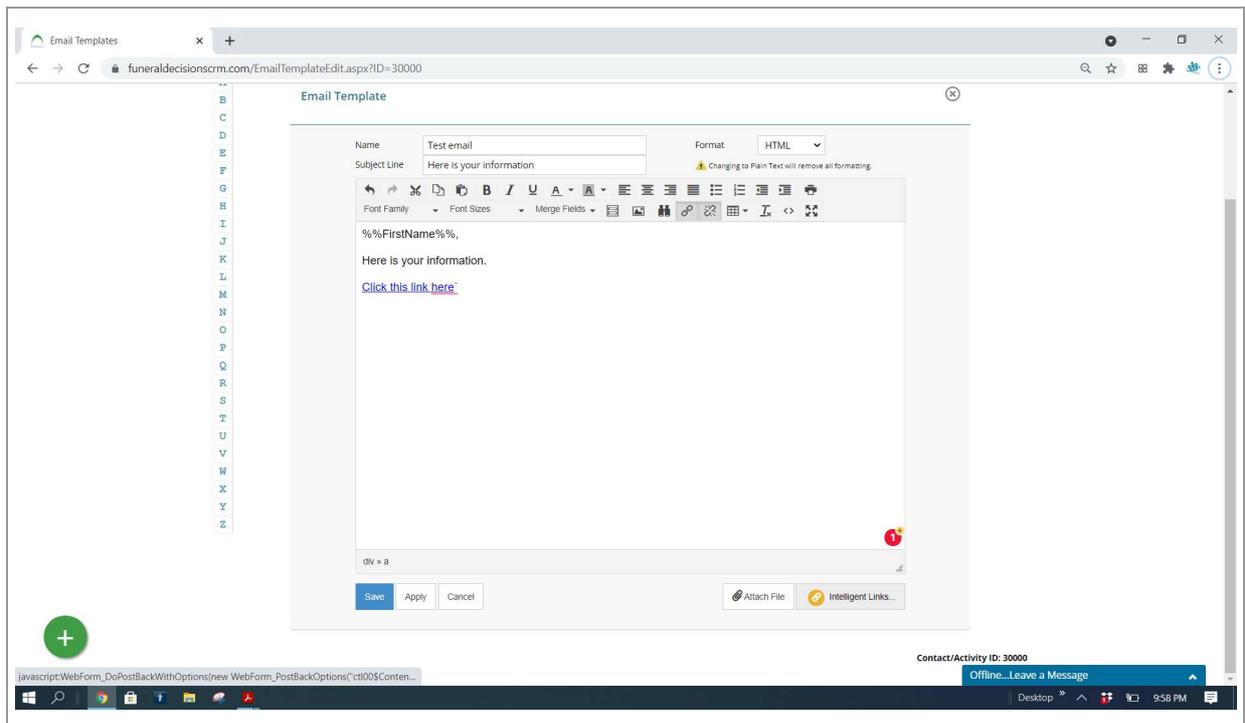
1. Write (or edit an existing) template
2. Highlight the text where the link is going to be
3. Click on the "Insert/Edit Link" button...it looks like a chain link.



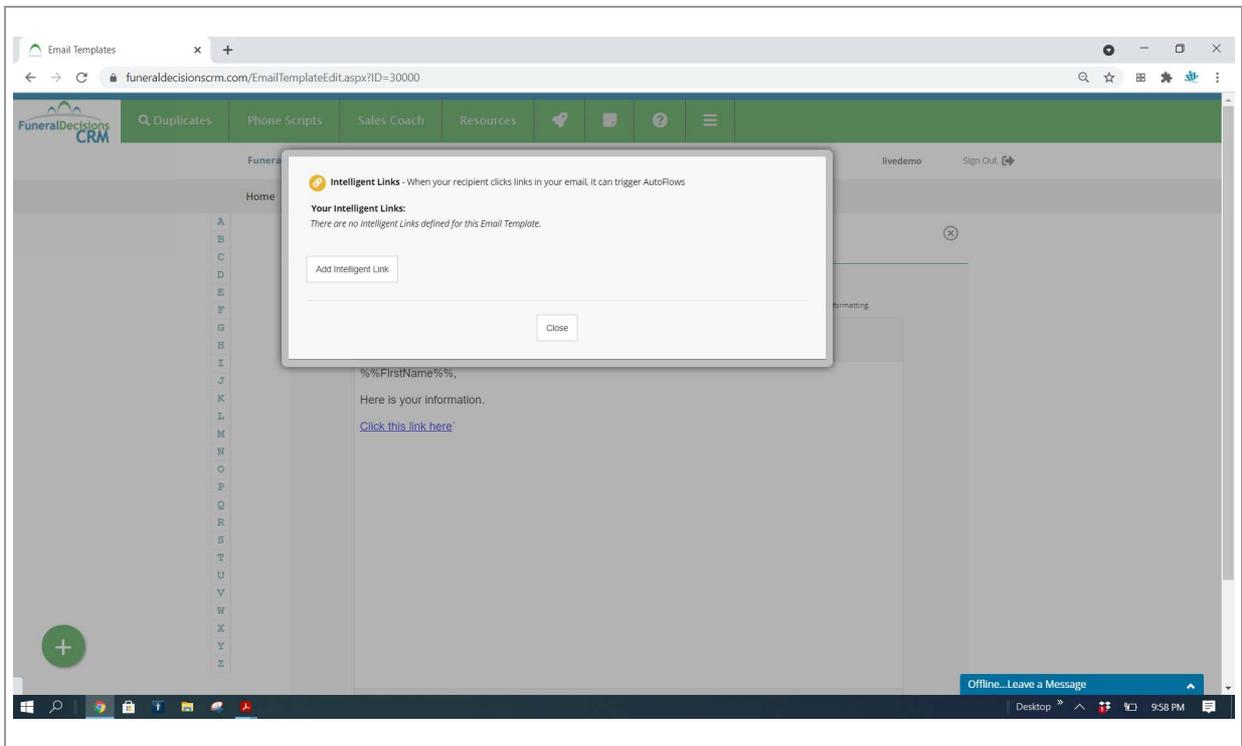
- Paste in the URL to the file (make sure you include the "http://")
- Click OK



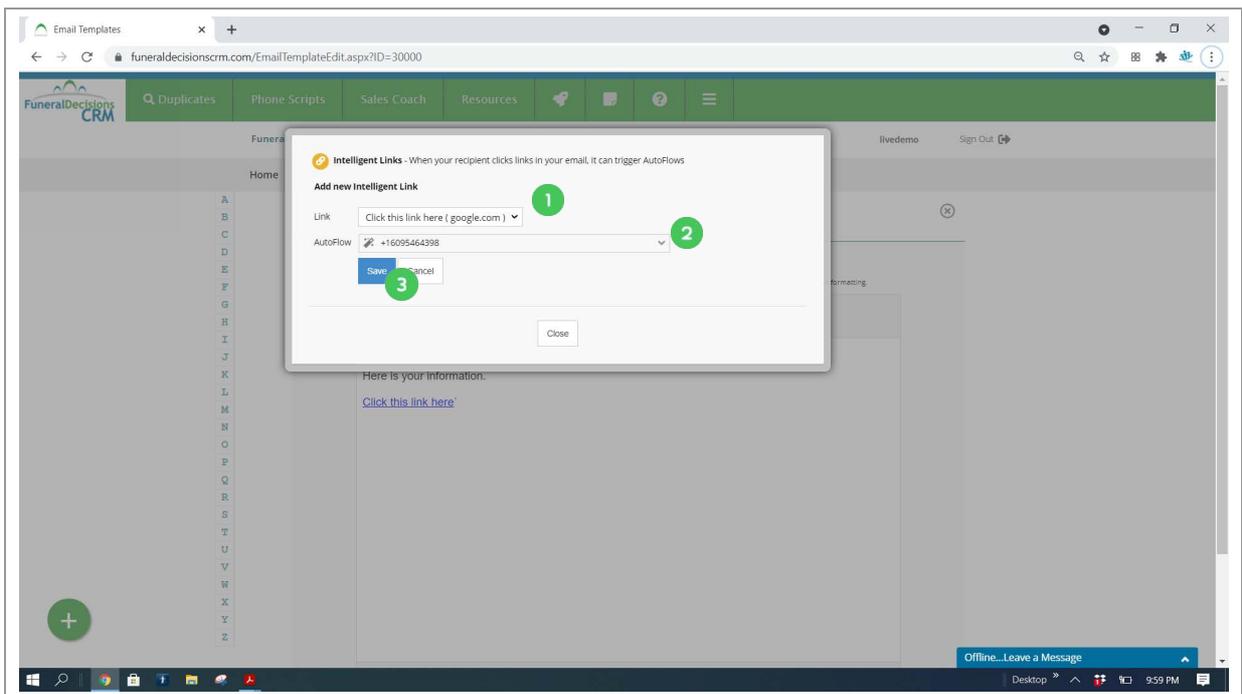
Click the "Apply" button



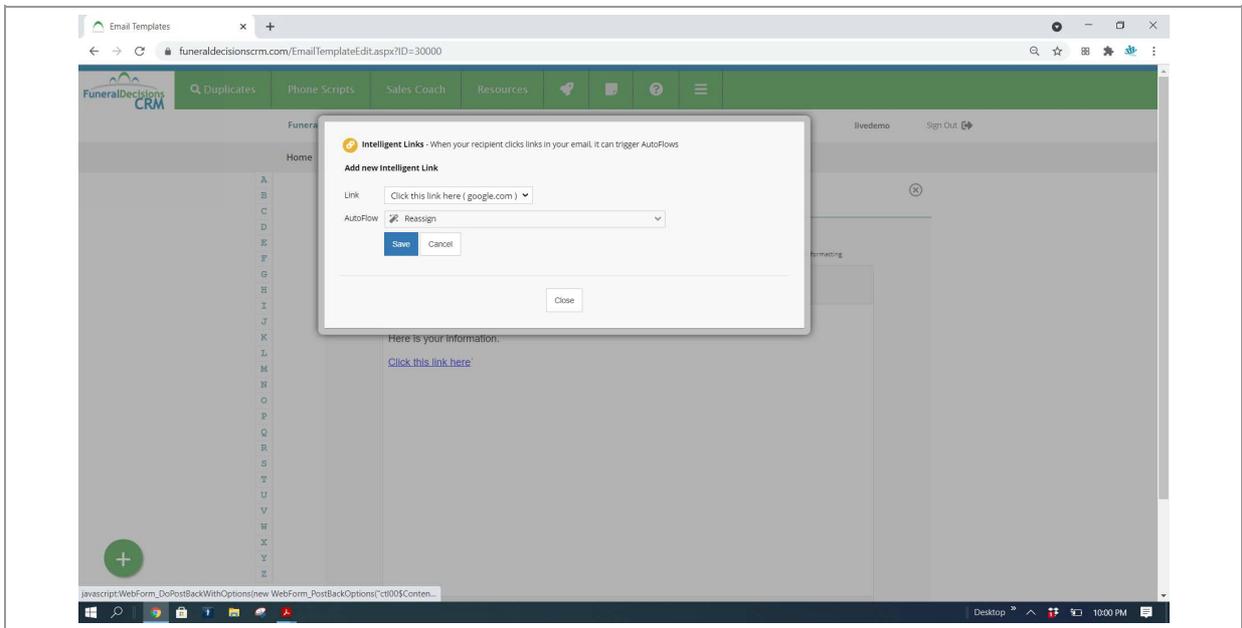
Now click on the "Intelligent Links..." button. Please note you need to click the "Apply" button before you can do this step.



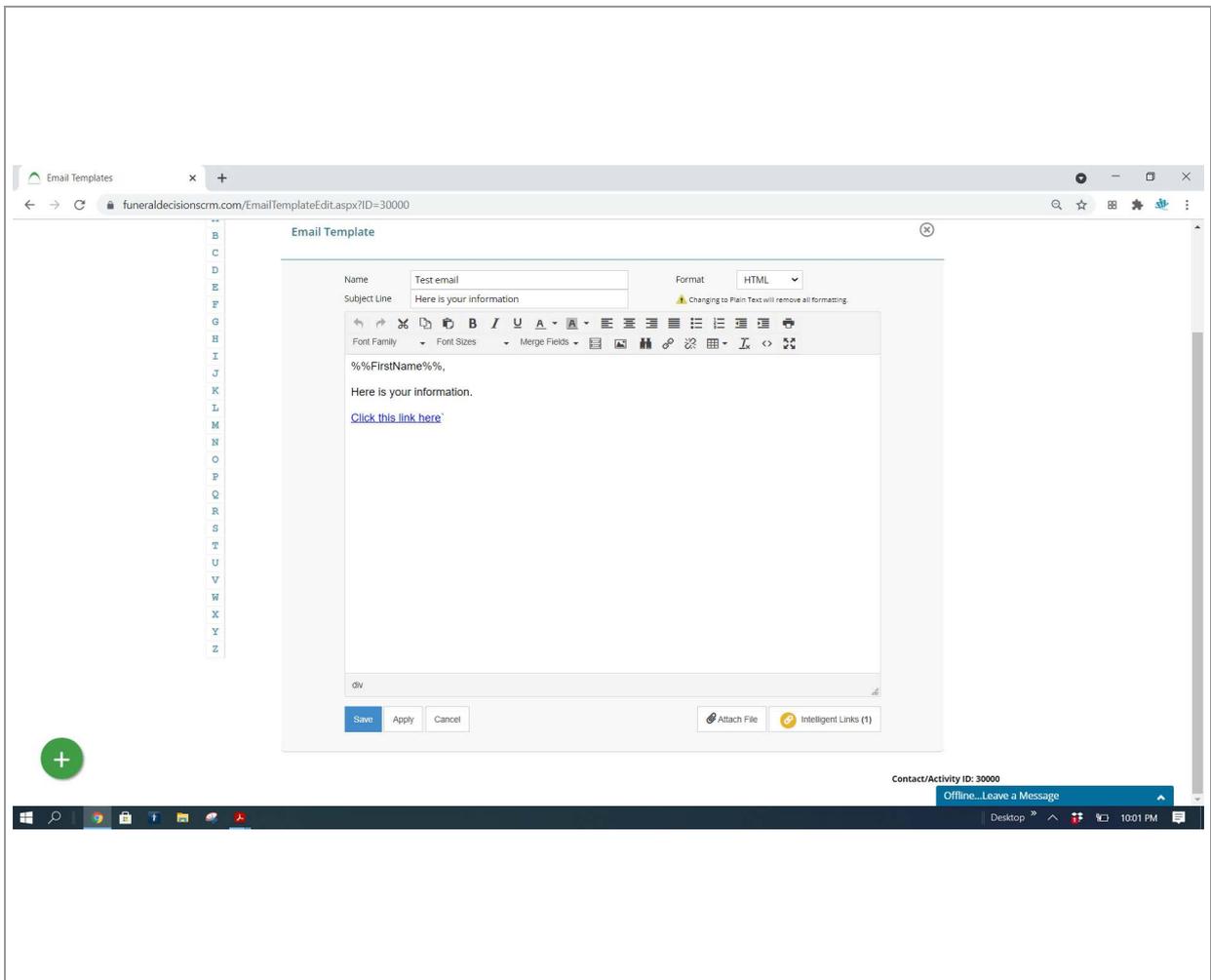
Then click "Add Intelligent Link"



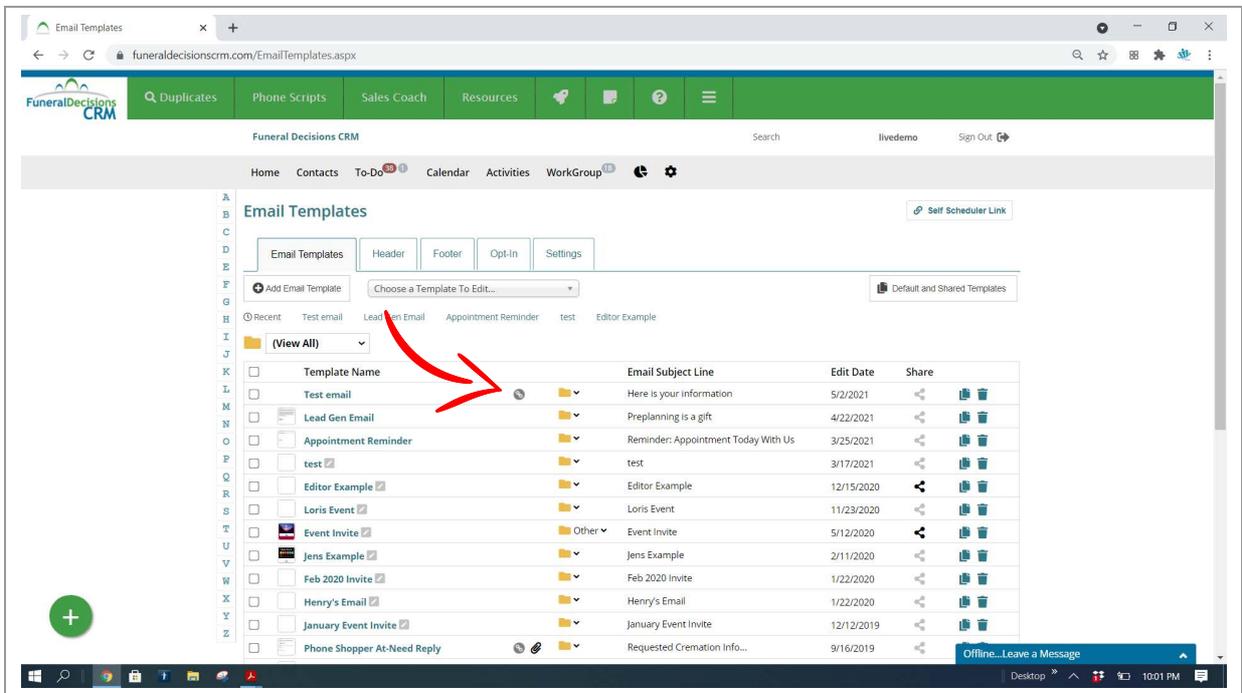
1. Select the link in your email that you want to turn into your "Intelligent Link". In this case, it's the link to the GPL document.
2. Select the AutoFlow (see the section on AutoFlows for more information about this)
3. Click "Save"



You will now see your Intelligent link show up...you can also add another one (if you have more than one link in your email) or clear them. Otherwise click "Close"



You will now see the number of Intelligent Links applied to this template. Click "Save".



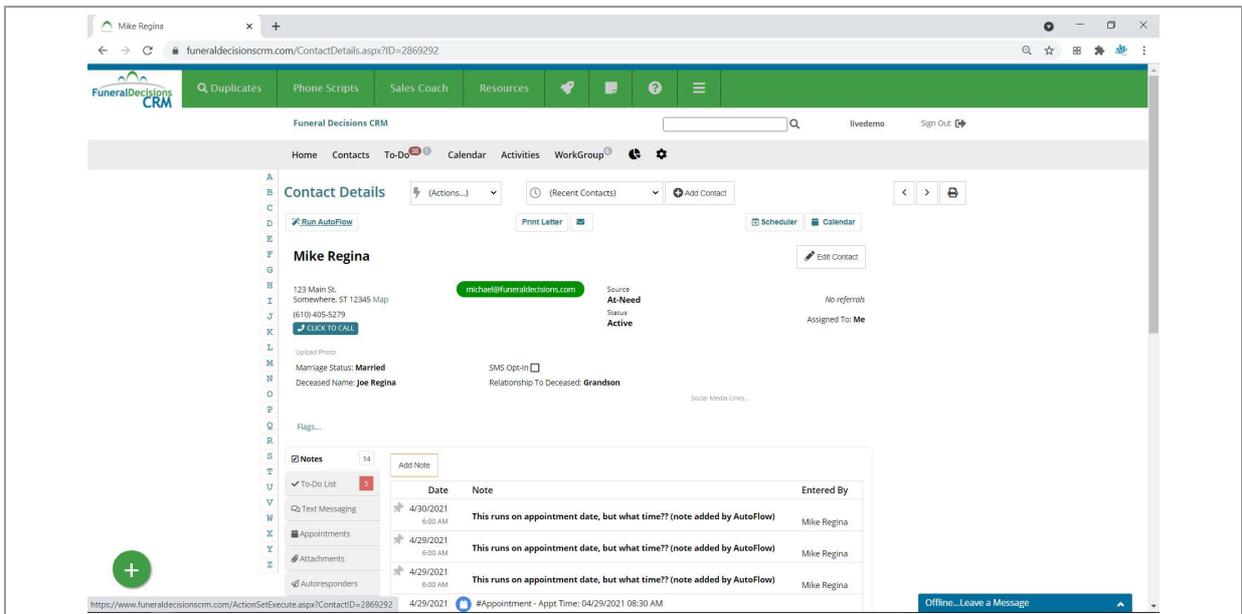
You will now see a 'link' icon in the template library next to any template that has Intelligent Links.

# Launch AutoFlow Manually

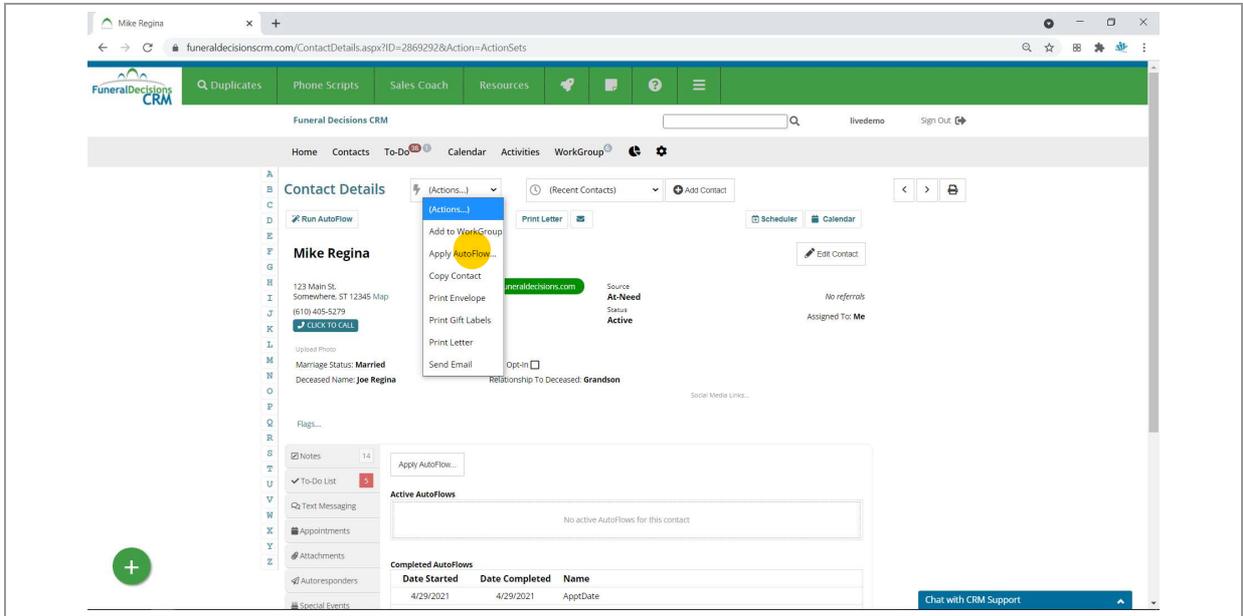
*FuneralDecisionsCRM*

Run an AutoFlow Manually

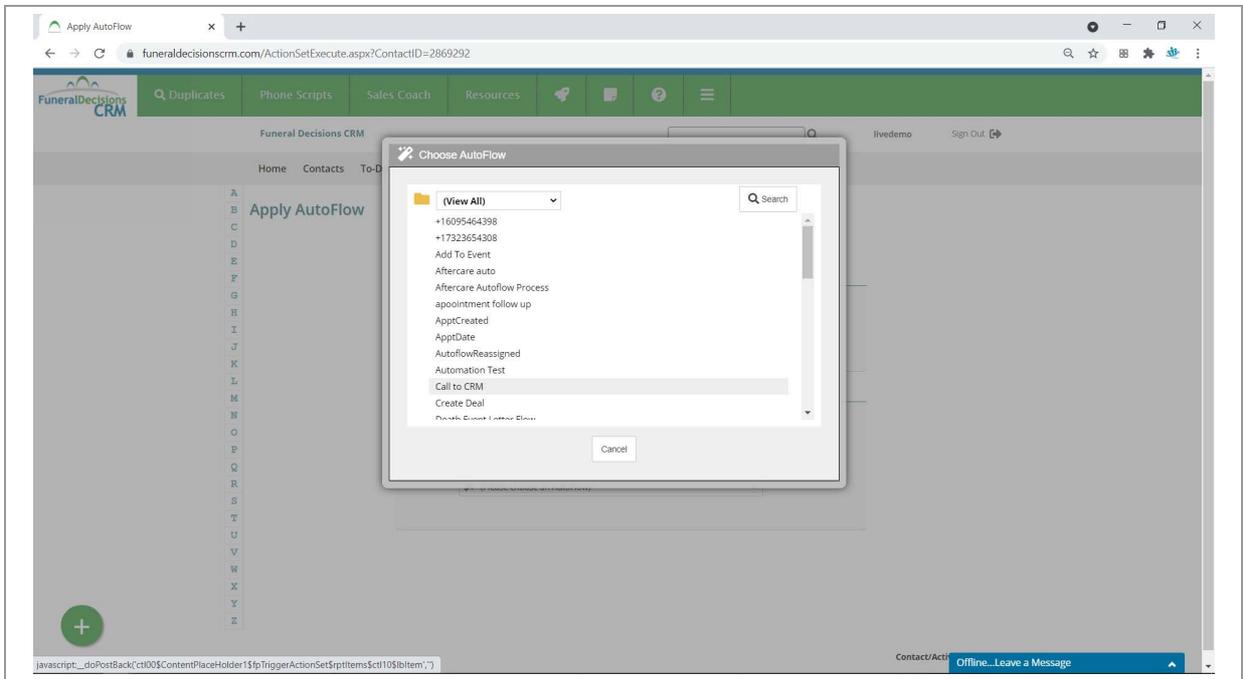
To Launch an AutoFlow Manually...



From the contact record, click on the Run Autoflow Button



Or select it from the drop down.



Click "Apply" next to the AutoFlow you wish to run

FuneralDecisionsCRM Mobile

# Adding FuneralDecisionsCRM To Your Phone

*FuneralDecisionsCRM*

FuneralDecisionsCRM works great on your Android, iPhone or Windows based smartphone! In this example we'll add it to an iPhone but the process is pretty much identical on Android.

Keep in mind that our app is a "Web App", which means there is nothing to download from the App Store and allows us to keep the mobile experience between Android and iPhone identical.

Open Your Browser

---

Verizon

3:41 PM



Sonos



Apple Apps



Safari



Phone



Messages



Mail



Camera

If you're on an iPhone open up Safari, if you use Android then open up whichever browser you typically use.

m.funeraldecisionscrm.com



Cancel

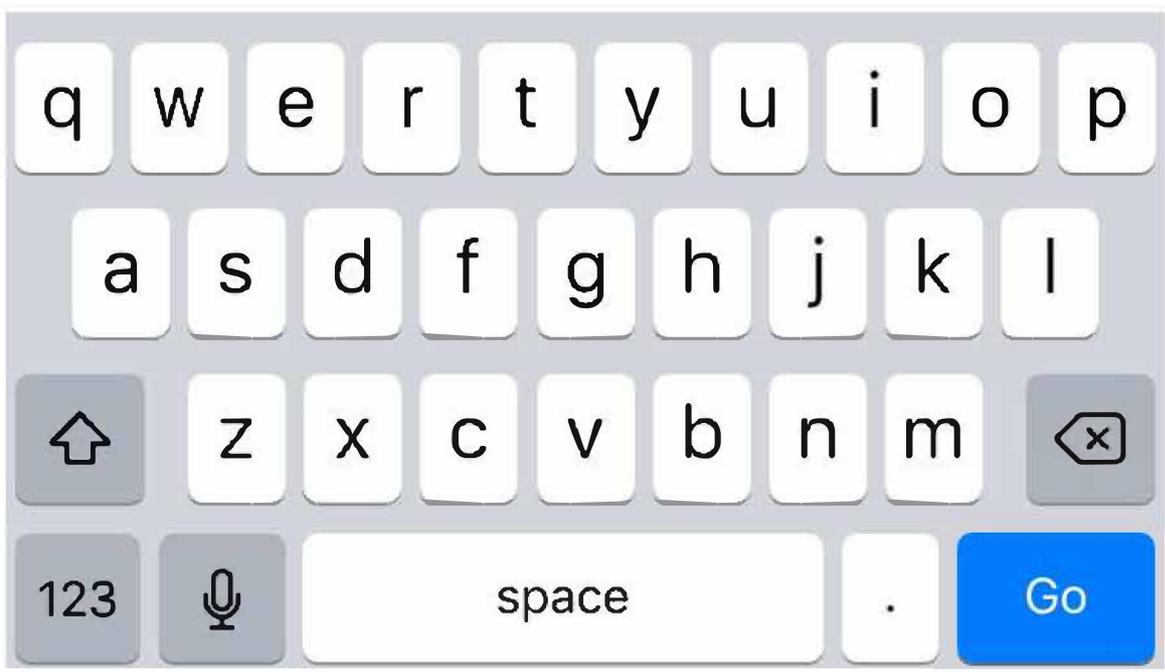
### Google Search

m.funeraldecisionscrm.com

### On This Page (no matches)

Find "m.funeraldecisionscrm.com"

Search results area with horizontal lines.



---

Type "m.funeraldecisionscrm.com" in the URL/Search Bar. Typically when you are on your computer you type, 'www.funeraldecisionscrm.com'...for the mobile site you will simply type 'm' instead of 'www'.

Mobile Contacts

**ACCOUNT LOGIN**

Email Address:

Michael@funeraldecisions.com

Password:

Log In

[View Full Site](#)



---

You will now see a login screen. On the bottom of the screen you will see some browser options. Press on icon of what looks like a box with an arrow coming out if it.

Mobile Contacts

ACCOUNT LOGIN

Email Address:

**AirDrop.** Tap to turn on Wi-Fi and Bluetooth to share with AirDrop.

Reminders    Add to Notes    Message    Mail

Add Bookmark    Add to Reading List    Add to Home Screen    Print



Cancel

---

This will then bring up a menu (Android's menu is similar). Press the "Add to Home Screen" button.



Cancel

Add to Home

Add



CRM



<https://www.funeraldecisionscrm...>

An icon will be added to your home screen so you can quickly access this website.

"CRM"



---

Type in a name for the web app such as "CRM" or "FDCRM"

Verizon

3:42 PM



Sonos



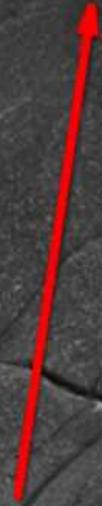
Apple Apps



Safari



CRM



Phone



Messages



Mail



Camera

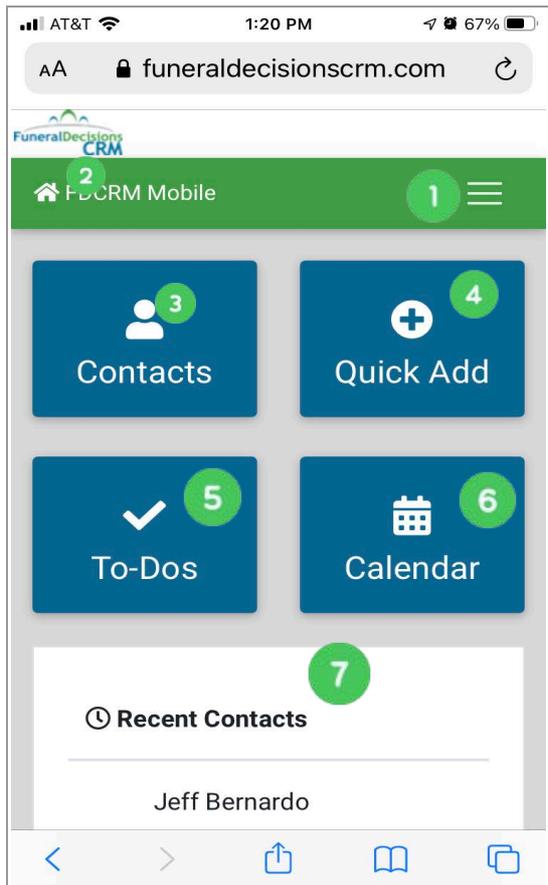
You will now see the icon show up on your screen just like any other app you download.

# Mobile App Overview

*FuneralDecisionsCRM*

Using the mobile app on your phone

## Home Page Overview



1. Hamburger Menu - brings up additional options
2. Home button - pressing here will take you to the home screen from most pages
3. Contacts - takes you to a screen where you can browse contacts alphabetically
4. Quick Add - enter basic information about a person and add to your database (First name, last name, contact info, status, source, and category)
5. To-Dos - see your To-Dos and filter by when they are due
6. Calendar - see all appointments 60 days out and add new ones
7. Recent Contacts - your most recently accessed contacts, whether they were on the mobile app or you computer

## Quick Add

AT&T 1:20 PM 67%

funeraldecisionscrm.com

FuneralDecisions CRM

FDCRM Mobile

### Add Contact

First Name Last Name

Email

Other First Name Other Last Name

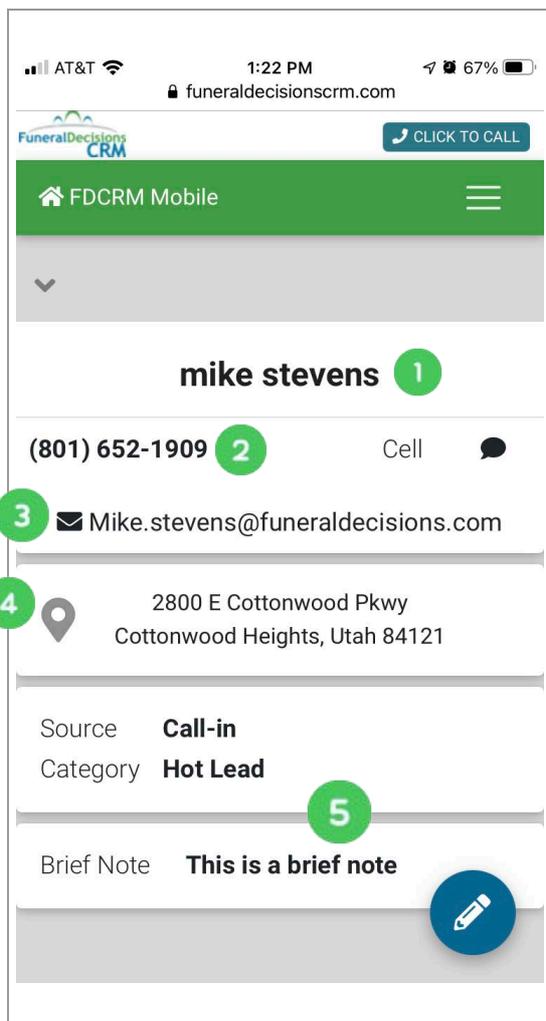
Other Email

Company

Phone 1 Note

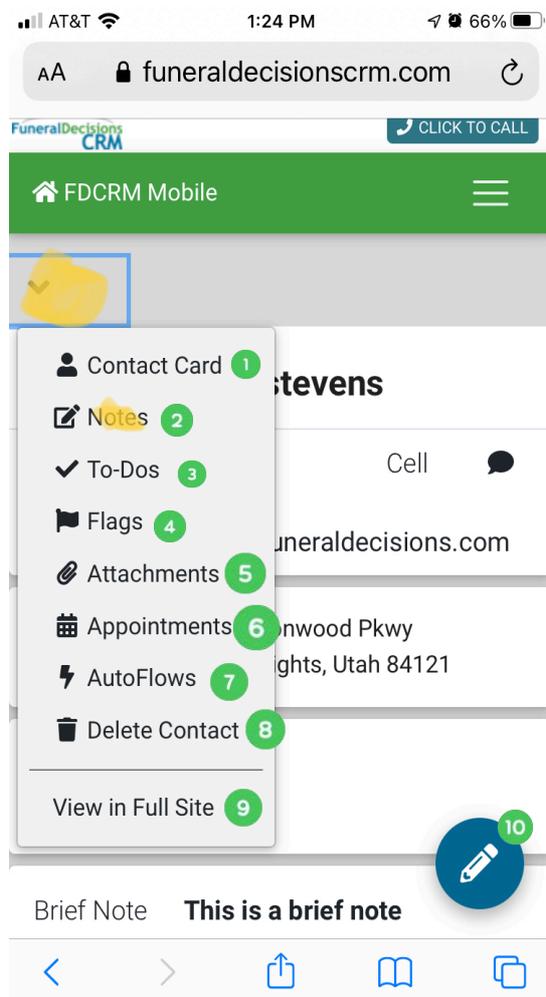
Quick Add gives you an easy and convenient way to quickly add contacts to your database on your phone. Simply press the "Quick Add" button on the home screen. Here you can add a person's name and contact information, along with a source, category, status and brief note. Press "Save Contact" at the bottom of the page when completed.

## Contact Screen Overview



When you go into a contact, this is the screen you will be presented with. It is a fairly simple screen with only the most important things available.

1. Contact's Name
2. Contact's Phone Number - this is a press-able link and will dial the person's number without you needing to remember it or copy and paste it. If marked as a cell phone you can also click the message link to send a text message
3. Contact's Email Address - also a press-able link. This will send an email through your phone's email account however. If you wish to send through FuneralDecisionsCRM, you will need to press the "Open Contact On Full Site" link at the bottom of the screen
4. Contact's Address - another press-able link. This will integrate with your phone's mapping system and give you turn by turn directions to the contact's house.
5. Source, Status, Category and Brief Note



Hitting the down arrow brings up additional options

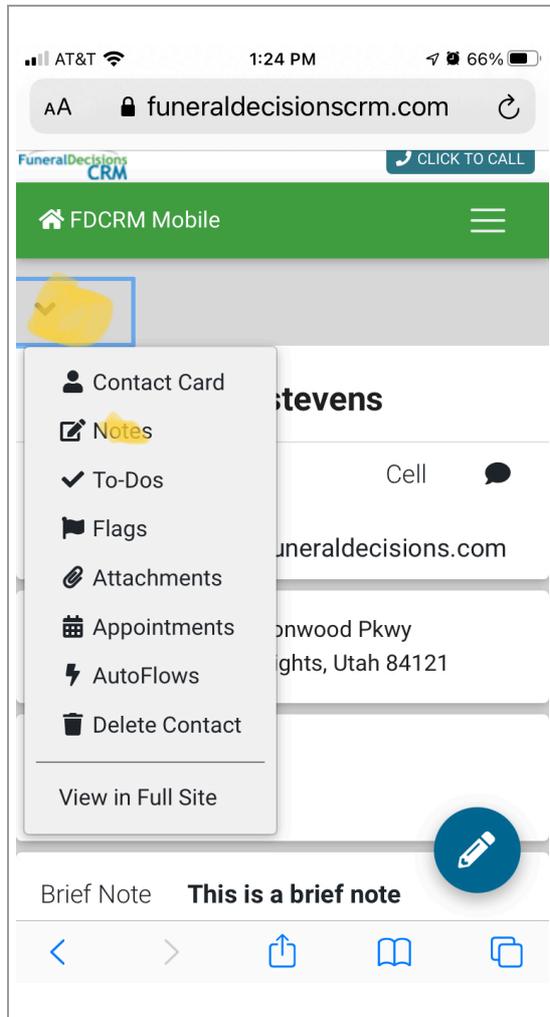
1. Contact Card
2. Notes section
3. To Do's for contact and to schedule a to do for the contact
4. flags to add
5. Attachments
6. Appointment for contacts and to schedule appointments
7. Start an auto-flow
8. Delete contact ( only if admin user)
9. View full site
10. Click this icon to edit the contact

# Neat Trick - Add a Note Using Dictation

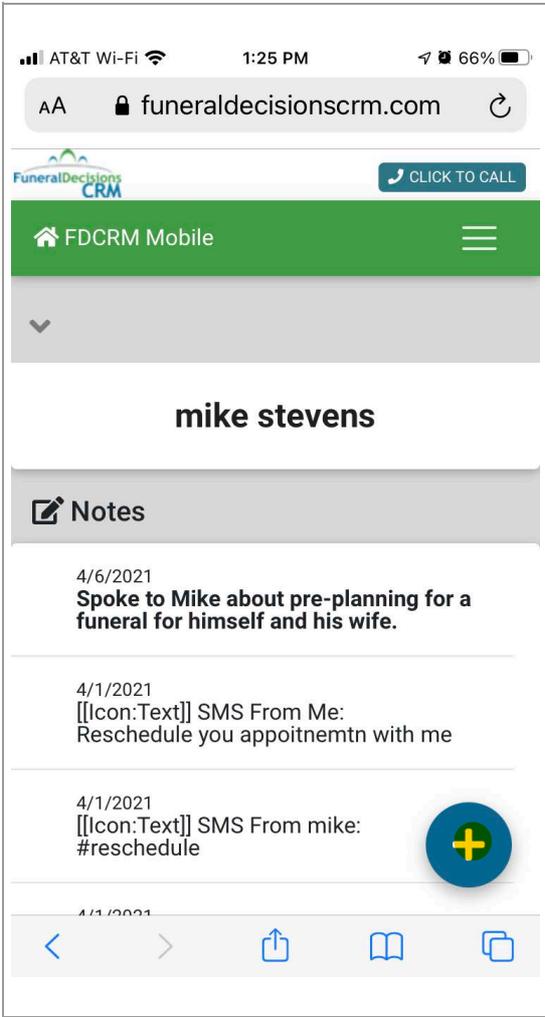
FuneralDecisionsCRM

So you can't type on your computer...or you're on your phone a lot and can't type that quickly...and you just got off the phone with someone and have a long note to make on their record. Don't worry...Voice-to-Text works great on our web app! Voice-to-Text is found on almost every new smartphone and operating system available.

We show you with an iPhone.



From the contact's record, press the "Notes" button



Then press the "Add Note" button

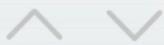
AA

funeraldecisionscrm.com



Enter your new note

SAVE



Done

I

The

Yes

Q

W

E

R

T

Y

U

I

O

P

A

S

D

F

G

H

J

K

L



Z

X

C

V

B

N

M



123



space

return

---

Press inside of the text box to bring up your keyboard. Now press the microphone button. On the iPhone (and iPad) it is directly next to the space bar. On Android phones it could be in a couple of different locations, including next to the spacebar.

# mike stevens

## Notes

Enter your new note

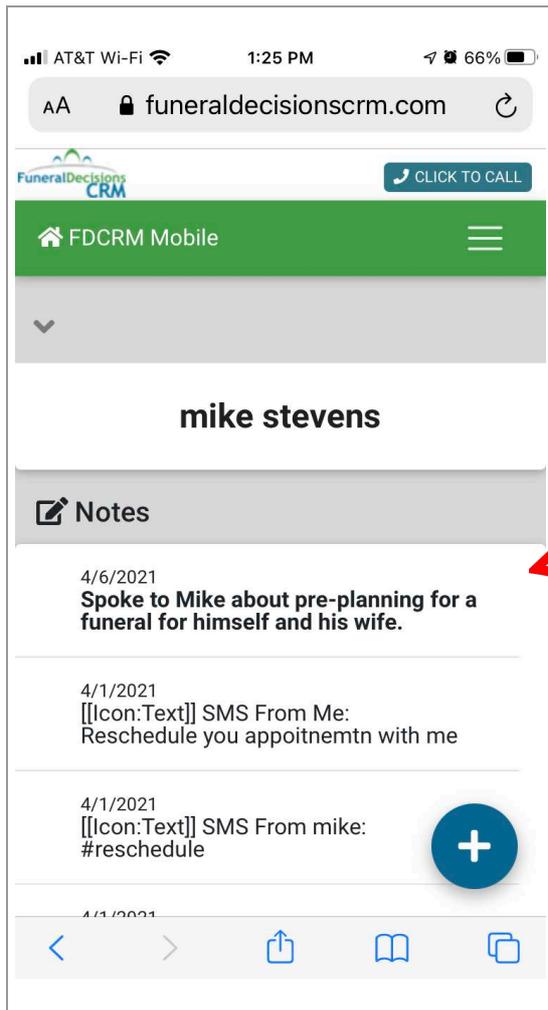
**Spoke to Mike about pre-planning for a funeral for himself and his wife.**

SAVE

CANCEL

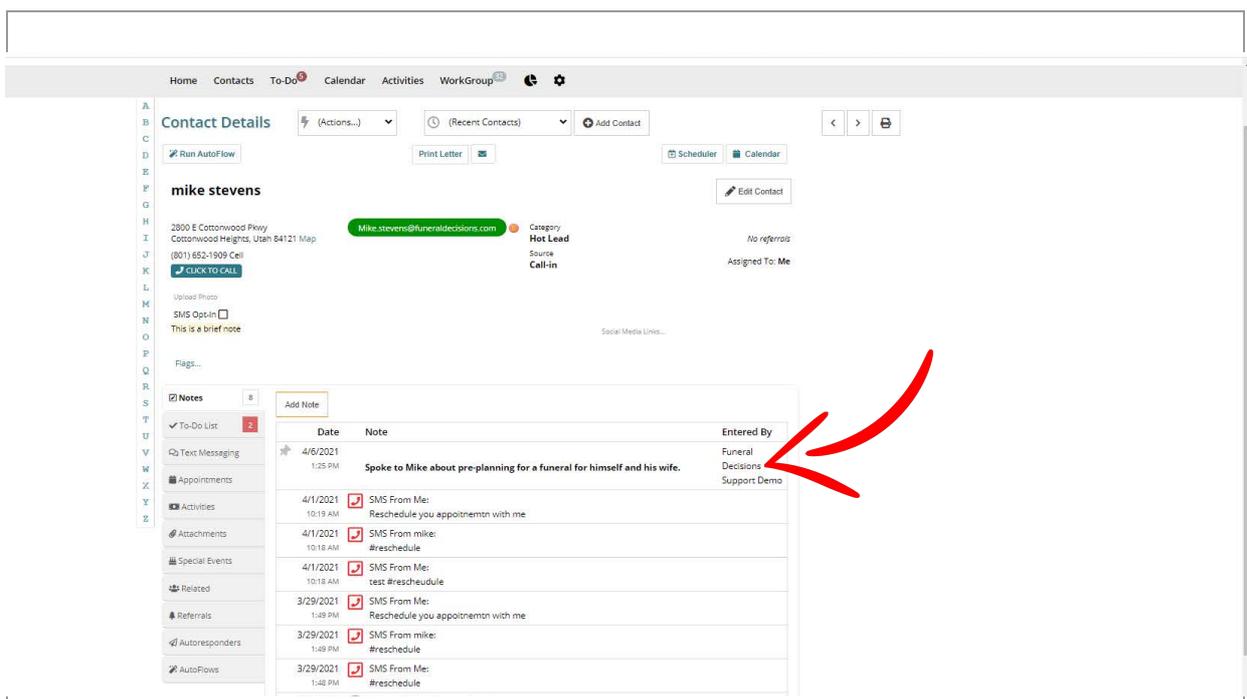


Now speak into your phone. Once you've made your note and have checked to make sure the phone has registered your note correctly, press the "Save Note" button.



You will now see your note show up at the top of screen, above older notes.

And It's On Your Computer Too...



If you go to your computer, you'll see that the note is there as well.

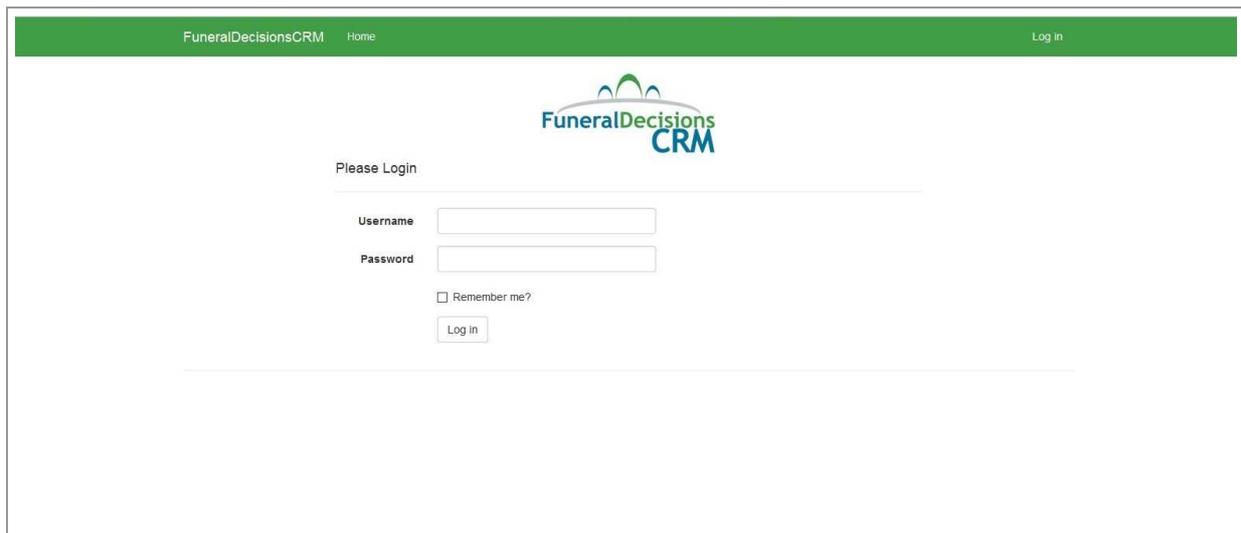
Reduced Capability User

# Overview

*FuneralDecisionsCRM*

FuneralDecisionsCRM offers two types of user profiles. The Full Featured User, who needs all of the capabilities of the system and the Reduced Capability User. The Reduced Capability User typically only needs to be able to view contacts in the database and make some minor edits or add Notes and To-Dos for sales and other full featured users.

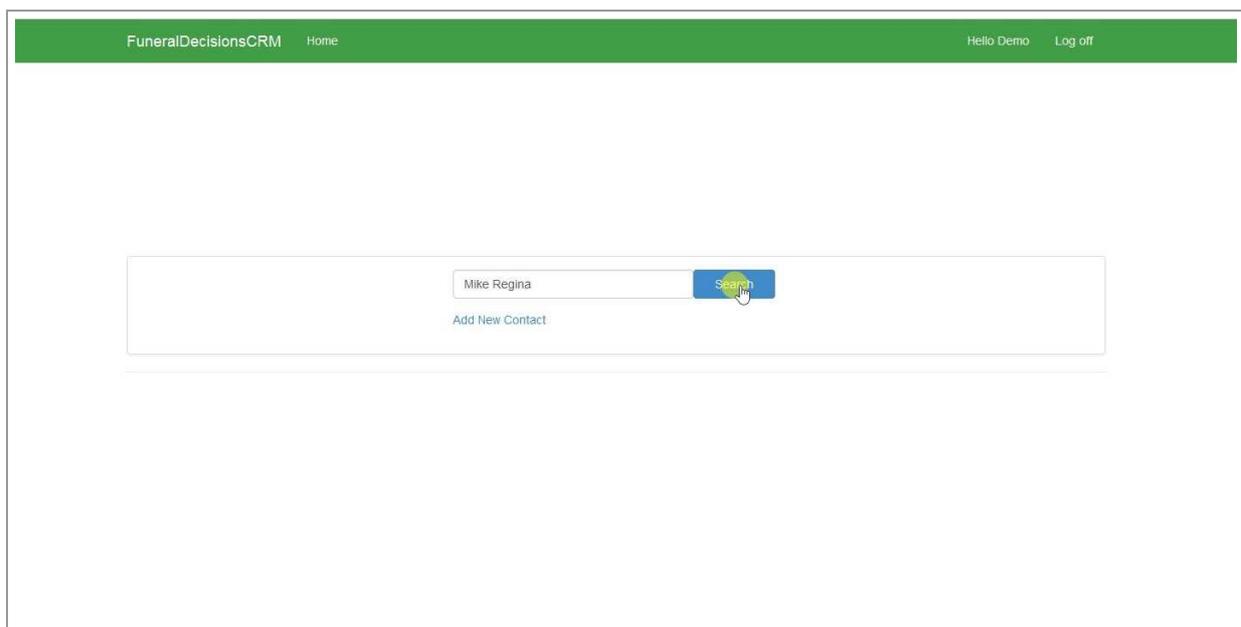
## Logging In...



The screenshot shows the login page of the FuneralDecisionsCRM system. At the top, there is a green navigation bar with the text "FuneralDecisionsCRM Home" on the left and "Log in" on the right. In the center, the "FuneralDecisions CRM" logo is displayed. Below the logo, the text "Please Login" is shown. The login form includes a "Username" field, a "Password" field, a "Remember me?" checkbox, and a "Log in" button.

1. Go to "http://crmuser.funeraldecisionscrm.com". Please note there is no 'www' on this URL.
2. Enter your user name and password and click "Log In"

## The Main Page

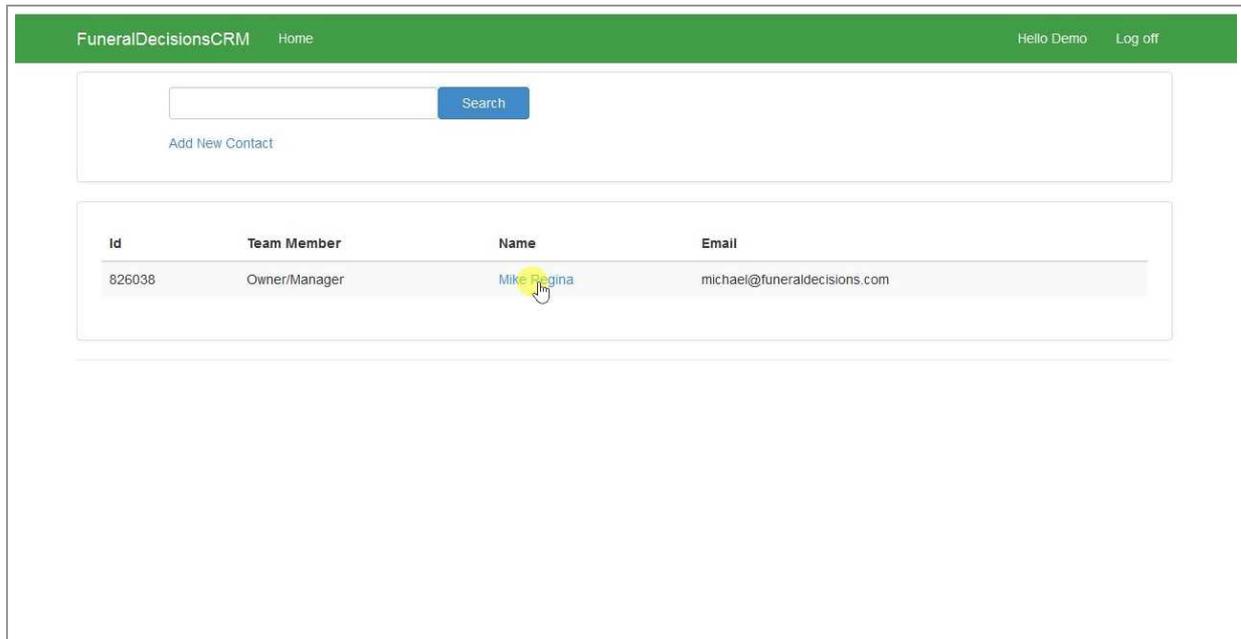


The screenshot shows the main page of the FuneralDecisionsCRM system. At the top, there is a green navigation bar with the text "FuneralDecisionsCRM Home" on the left and "Hello Demo Log off" on the right. In the center, there is a search bar with the text "Mike Regina" entered. To the right of the search bar is a blue "Search" button. Below the search bar, there is a link that says "Add New Contact".

The main page is setup to be extremely straight forward. There is only one main thing to do here and that is to search for a contact. You will also see a link below that says "Add New Contact" (in most cases)...this will allow you to add a new contact to the system.

Type in the person's name you are searching for and click "Search"

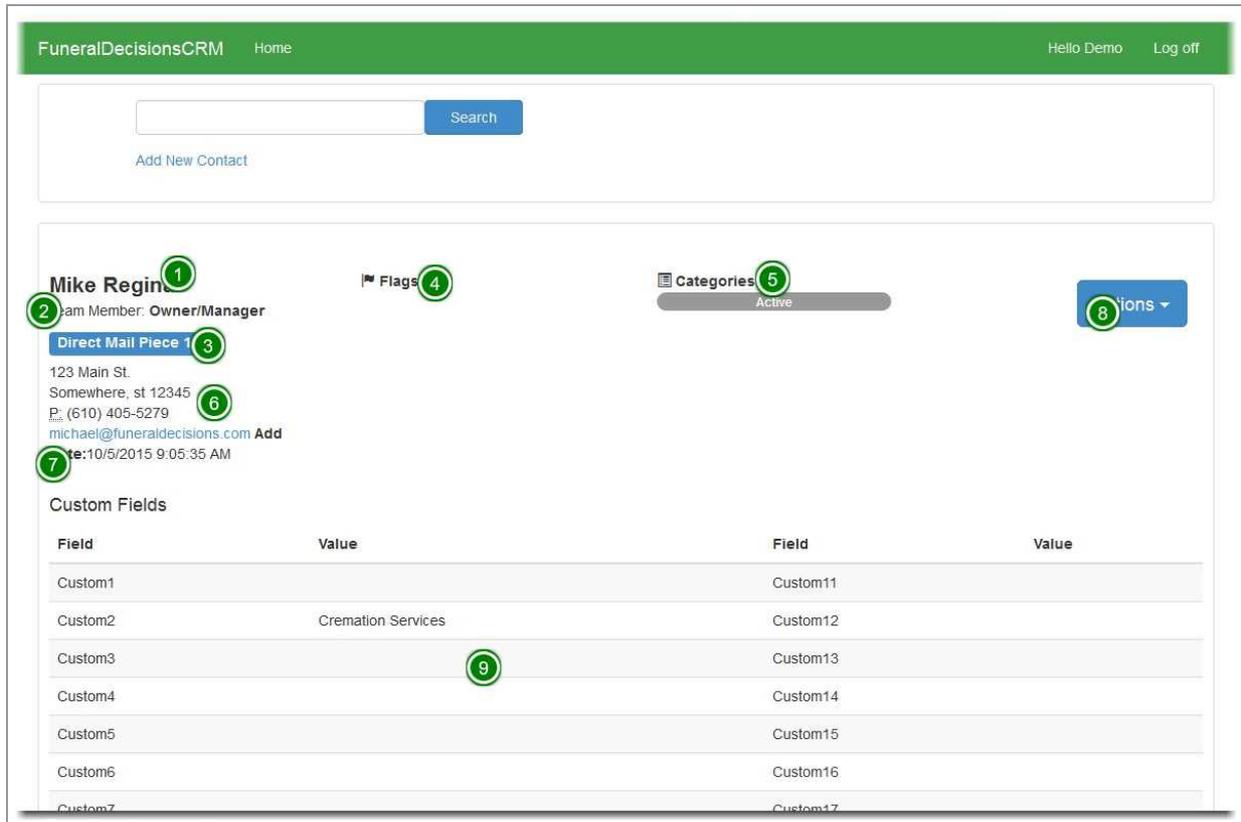
# Contacts List



You will then be taken to the list of contacts that matched your search (especially if you only type in a first or last name). This screen will show you the CRM system ID for the contact, which counselor they are assigned too, their full name and email address.

To access their contact record, click on their name.

## The Contact Record



The contact page shows all of the information available in the full featured CRM system.

1. Contact Name
2. Assigned Counselor
3. Source
4. Flags
5. Status and Category
6. Address, Phone number and Email

- 7. Date Added
- 8. Available Actions (See Available Actions)
- 9. Custom Fields

## The Contact Record (...continued)

|          |          |
|----------|----------|
| Custom9  | Custom19 |
| Custom10 | Custom20 |

**Notes** 1

| Date                  | Note                             |
|-----------------------|----------------------------------|
| 10/17/2015 9:34:15 AM | Thank You - From the XX Family   |
| 10/10/2015 9:34:54 AM | Did You Receive Our Information? |
| 10/8/2015 9:33:41 AM  | Did You Receive Our Information? |
| 10/6/2015 9:34:26 AM  | Thank You - From the XX Family   |
| 10/5/2015 9:26:46 AM  | Funeral Services Information     |
| 10/5/2015 9:18:18 AM  | Here's Info...                   |

**To Do Plan Steps** 2

| Due Date   | Completed Date | Summary  | Status | Priority |
|------------|----------------|--|--------|----------|
| 10/18/2015 |                | Send Initial Email                             | open   | 3        |
| 10/25/2015 |                | 2nd Follow Up                                  | open   | 3        |
| 11/1/2015  |                | Adjust Marketing Path - Incubation or Customer | open   | 3        |

- 1. Contact Notes
- 2. To-Dos assigned

# Available Actions

*FuneralDecisionsCRM*

Each Reduced Capability User has different actions available to them, you'll see yours in the contact record, under the "Actions" button.

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Your options will vary based on what capabilities you have as a user.

1. Edit Contact - edit the contact's information (name, address, phone, custom fields)
2. Add Contact Note - add a note to the contact.
3. Edit Flags - remove or add new flags
4. Edit Categories - change the status and category
5. Assign To Do Plan - assign a predefined To-Do Plan to the counselor
6. Add To Do - assign a single To Do item to the counselor
7. Run Action Set - run a predefined automation task (See System Automation)