

FrontRunner Manual

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FrontRunner Professional

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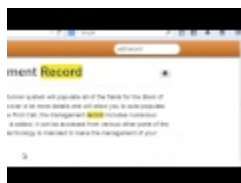
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Introduction

Welcome to the FrontRunner Professional Online Manual



This is your gateway to everything you need to know while working in your system.

The menu on the side lists the most common tasks associated with the system and how to access the information to create, edit, integrate, showcase, and print.

Please use the *Search* function at the top right if you don't see what you need in the menu. Once a keyword or phrase is entered, the pages with that keyword or phrase are listed and the words are highlighted in yellow on each applicable page.

✿ If you prefer to have a hard copy version of any page contained within this manual, select the *Print* icon at the top right. If you would prefer to download the entire manual for future reference or to print what you need for the office, click on *Download as PDF* below the left menu.

If you have any questions or require additional information, don't hesitate to contact us at support@frontrunner360.com.

Login to Your System

Enter the URL (ending in .frontrunnerpro.com) to access the login screen. The username and password must be entered every time you login. When asked if you would like the browser to save your password please choose the "Never for This Site" option. This will prevent unauthorized access to your data.

✿ Please note that usernames and passwords are case sensitive. (ex. password and Password are not the same).

Videos

Step-by-step videos are available for many features within the FrontRunner system. They are short-and-to-the point and can be found in the [FrontRunner Manual YouTube Playlist](#).

[New to the System? >>](#)

New to the System?

If you're new to FrontRunner and require a few quick tips to get you started on the main components of the system, the information below will help.



Login to Your System

Go to your website and click on Admin in footer of site (or enter the URL – ending in .frontrunnerpro.com – to access the login screen.) The username and password must be entered every time you login. When asked if you would like the browser to save your password please choose the “Never for This Site” option. This will prevent unauthorized access to your data.



Please note that usernames and passwords are case sensitive. (ex. password and Password are not the same).

Add a Record

Below is a brief step-by-step description to create / add a new record. For a more detailed description, please [visit the website record page](#):

- Main > Records
- Mouse over the 'Add a New Record' button at the top right. For a basic record, choose either Web Only or Book of Memories.
- Enter all basic information.
- Use dropdowns to select Place of Death and Clergy. If the locations are not visible, Add a new location.
- Choose from one of the three options for Donations: Family Preferred Charities, Charity of Your Choice, or No Donations
- Add Visitation, Service, Interment, Reception details.
- Enter the life story or obituary (information can be pasted from another source if already written).
- Click Save at the top right.

To choose a theme and add photos, select Book of Memories in the left menu. For a more detailed description, please [visit the Book of Memories page](#).

- On the Theme page, select a category to display all the available themes. Click on any of the themes to preview.
- Manage Photos – select Upload a New Photo and then Add to locate the photo(s) on your computer. If there is more than one photo, designate one of them as the primary by clicking on Set as Primary below the image.
- Save.

The record will publish to your website and automatically create a Book of Memories. If you do not see the record, return to 'Web Details' and on top right, click on Edit Record Settings. Make sure the first option (Publish to Web) is marked as Yes.

Edit a Record

Once you login, the Main > Records page displays. All current records will be visible. If you need to access another type of record, either enter the name in the Search box, click on the first letter of the deceased's last name, or choose from the left menu to display:

- Current Records
- Past Records
- All Records
- Standard Records
- Web Only Records
- Pre-Need Records

Once you locate the correct record, click on it to open. Navigate to the section that requires changes. Click on Save at top right to make the changes live.

Edit the Website

To make changes to your website content, open the Website tab at the top of your desktop. Navigate to the page that requires changes and (in most cases) click on Edit Content. Certain pages also contain header and footer sections; if so, buttons to edit those will appear at the top right. A detailed description of the editing capabilities (adding a photo, changing text, creating a hyperlink) can be found on the [Wireframe Editing page](#). To add / delete / hide / re-name a page, please refer to the [Manage Website section](#) of the manual.



Once changes have been made to the website, click Save at top right, **Publish** in the left menu, then the 'Publish' button in the top right. Until your changes are published, they will only be visible within administration mode and not on the live website.

Edit Website Home Page – Wireframe

If you have a wireframe website, the home page is full of widgets than can be easily edited by hovering over the section and clicking on Edit. More details about each section (including the Welcome Message) can be found in the [Wireframe Editing](#) section of the manual.

Videos

Step-by-step videos are available for many features within the FrontRunner system. They are short-and-to-the point and can be found in the [FrontRunner Manual YouTube Playlist](#).

[<< Introduction](#)

[New Pulse Dashboard >>](#)

~New~ Pulse Dashboard

In December 2014, FrontRunner officially released its new Pulse system. The video below explains one of the major changes we have made with the new software— the Dashboard.

With the dashboard your firm now has key information at your fingertips, without having to jump around to multiple screens. The new system will help you better understand the effectiveness of your online presence, with features such as:

- Our integration with your **Google Analytics** account gives your staff a snapshot of what visitors are doing on your website.
- The **Search History** section will help your staff better understand what families are looking for on your website.
- The new **Record Analytics** section displays information like your cremation rate, as well as the degree of activity that your Book of Memories memorial websites are receiving.

At FrontRunner we also believe in helping your business grow by providing you online tools to both generate revenue and save you money. You will have quick access to these tools on your dashboard:

- Our **Simply One** section demonstrates the commissions you are earning on your website
- The **Loyalty Reward** section provides quick access to your loyalty rewards account
- The **Staples Advantage** button offers an easy link to your Staples account login page. In partnership with Staples, FrontRunner has negotiated great discounts on office products for your firm!

On top of all this, you will have access to great features such as a daily calendar, event schedule, notification center, the message center, and a customizable quick links feature for you and your staff.

If you do not already have this feature turned on, please contact us for more information.

Please see the video below for an overview of the Dashboard features.



[<< New to the System?](#)

[Help Resources >>](#)

Help Resources

Please use the Help Desk section, found from your Main tab, when you have a question or technical issue with something in your system.

You will find a list of helpful tools we have to better serve our clients.

- User Manual
- [Frequently Asked Questions](#)
- [Policies](#)
- [Submit a Support Ticket](#)
- [Training Documentation](#)

[<< New Pulse Dashboard](#)

[Top Support Questions >>](#)

Top Support Questions

As you work your way through the FrontRunner system, you may come across a section that is new or you've never worked in before. This manual is intended to address any support issues that may arise but we thought it also might be helpful to outline the most common support questions. If you are unable to find the answers to any issues that may arise, don't hesitate to contact us by submitting a ticket via the form at the bottom of this page.

1. For some reason, I am no longer able to print forms. Why has this stopped working?

The majority of printing issues in the system stem from not having the latest version of Java installed on your computer or the web browser has disabled Java from running.

- **For clients using a PC:** Go to www.java.com and download and install the latest version of Java. Once that's done, in Firefox, check in "Tools", then "Add-ons" and then "Plugins". You should see an item named "Java Platform SE". Be sure that it is enabled.
- **For Mac users:** Apple has its own version of Java so check for any software updates. Once the software is up-to-date, try printing again.

You will now have to let your computer know that it's safe to run Java from your site.

For Windows users, click the "Start" icon in the lower left corner of your screen, and in the "Search for Programs" field enter "Java". You'll see one of the options listed is "Configure Java". Select that. In the window that opens, select the "Security" tab. The security is generally set to high, and it's best to leave it there. You'll also see an option to "Edit Site List". Select that and in the next window select "Add" and then enter the URL for your domain. You can copy and paste the address bar from your system log in page. It should look like this "[https://\(yourfuneralhome\).frontrunnerpro.com](https://(yourfuneralhome).frontrunnerpro.com)". Don't copy any other data past the "com". Click OK to complete. Once that's done, close it and you're done.

For Apple users, to access the Java console, open your System Preferences, then select Java. Once it opens, proceed with the same steps as above.

2. How do I add a local charity as the Family Preferred charity?

If you have searched the Master Database for a charity and can't find it, you will need to add it to your database. This often happens when you need to add a new trust fund for a family or if there is a small community organization that is not a registered charity.

Go to System Settings > Databases > Charities. All charities ever added will be visible. To add another one, click on “Add a Charity” in the upper right corner. Be sure to enter all necessary information including the fulfillment method. Once the charity is added, return to the record and click the drop down for Non-Charitable Organizations. Locate the charity and Add it to the Family Preferred list. Save.

3. Why aren't all the changes I made to the website showing up?

If you have made and saved your website changes within administration but those changes aren't visible on the live site, you probably missed the “Publish” step:

- First check to be sure the page or pages aren't “Hidden”. You can check that in the web editor site map.
- In the website editor, select Publish. The new screen will display the last published date. Select the Publish button. This process will send all the changes to your live site. If you have a larger website, the publishing process could take a minute or two.
- Once the Publish process is complete, check the live site. If you still don't see the changes, refresh your browser.

4. Why aren't the submitted condolence messages showing in the Book of Memories?

If a condolence message is not visible in the Book of Memories, it may have been marked as Private. To check that, open the record to edit:

- If it's a Standard record, select Book of Memories > Tributes to view all submitted messages. If a condolence message is marked as Private, that will be displayed with the message. To change that, select Edit beside the message and set the Private option to No. Save.
- In Web Only records, go directly to Tributes. Follow the same instructions as above.

There is also a chance that the person who posted a condolence didn't do so on the Book of Memories. They may have submitted to legacy.com or tributes.com and expected the condolence to be visible on the Book of Memories. You may want to do a Google search for the name of the deceased to see if there's anything on another site.

5. Why can't I post my story to the Book of Memories?

The system has a filter that checks all messages for inappropriate words. If it finds one, the story won't post. At times, the filter may seem a little oversensitive but it's best to be safe than sorry. If the filter is blocking a submission, you can still get the message to post to the Book of Memories by following these steps:

- In the Book of Memories, start the condolence or story submission process. Enter all the information and then type one letter in the message field. Submit that.

- Open the record and select Tributes. Find the message you just submitted and select Edit. Copy and paste the rest of the message and Save. This step will ensure the message is posted on the the Book of Memories.

6. How do I correct a mistake in a message or delete a message entirely from the Book of Memories.

Open the record. Any message submitted to a Book of Memories (Candle, Condolence, Donation, or Story) can be edited in the record.

- If it's a Standard record, select Book of Memories > Tributes. Locate the message that needs to be corrected (Edit) or removed (Delete). Save.
- In Web Only records, go directly to Tributes. Follow the same instructions as above.

7. I've added a new record but it's not appearing on the Current Services List and now I can't find it anywhere in the system. Where did it go?

Most often, if you are unable to locate a record that you saved in the system, the Date of Death was not added. That date is vital information in the system because it determines whether a record is Current or Past.

Go to "All Records" and enter the name of the deceased in the search field and click Search. Once the record is located, check to make sure the Date of Death has been entered correctly.

8. I lit a candle and want to pay by check/cheque. What is the mailing address?

Please make the check/cheque payable to FrontRunner Professional and send to the following address:

FrontRunner Professional
6A Clarence Street
Kingston, Ontario
Canada
K7L 5H8

9. I'm trying to pay for a memorial candle with my credit card but I continue to receive a message that the transaction is declined. What's going on?

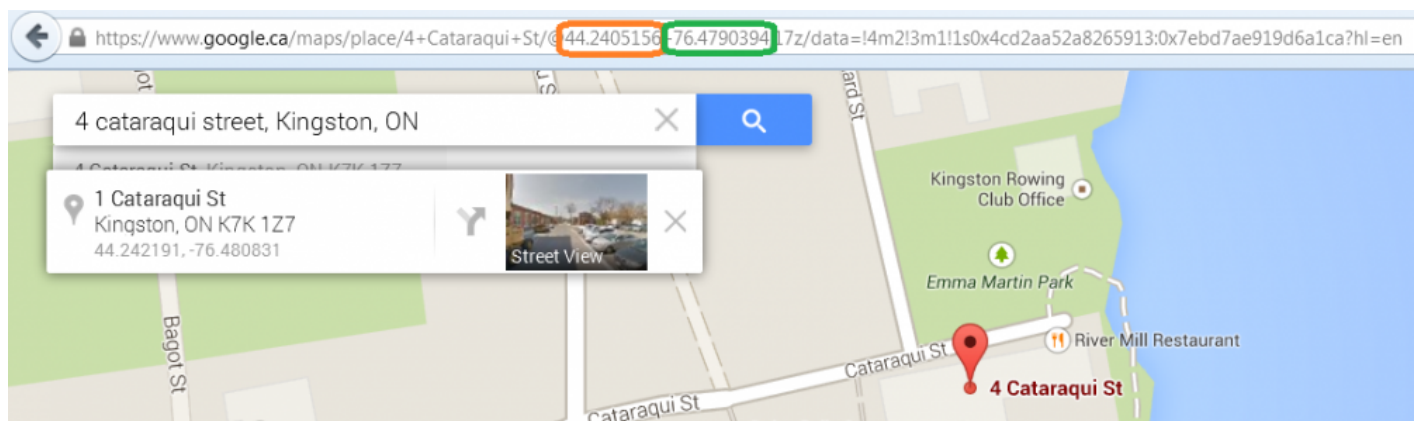
For the cardholder's protection, if the information entered is not an exact match with what the credit card company has on file, the transaction will be declined by the credit card company. Suggest the purchaser contact their credit card company to verify all information and, if necessary, enrol the card in their security process. (Verify by Visa / MasterCard SecureCode)

10. Why is Google Maps not showing the correct location?

Google Maps isn't perfect but there is an easy fix if the location is not displaying properly.

System Settings > Databases > Locations. Find the location and click on it to display all the information. If the address is correct, you will need to enter the GPS Coordinates for the location:

- Open Google Maps and find your exact location on the map.
- Right click and from the pop-up window, select "What's Here".
- Refer to the Google Maps search bar where you will see a set of numbers separated with a comma.
- Copy the first number (not the comma) and paste it in the first coordinate field.
- Copy the second number, including the hyphen at the beginning of the number. Paste that in the second field. Save and test the map again.



11. Why are there duplicate photos showing in the Book of Memories?

Open the record > Book of Memories > Manage Photos. Check the file names of the photos that have been uploaded. If there are any that have duplicate file names, they will have to be deleted, re-named, and then uploaded again.

12. Why is the Book of Memories getting spammed?

It's important to activate "captchas" in your system in order to prevent spam (computer generated posts with junk links and messages). There are several captcha options but we recommend the "Simple Math" captcha. To set the captcha for your system follow the steps below.

- Main > Book of Memories > Global BOM Settings.
- Go to the option labelled Captcha Preference for BOM pages.
- Set it to Simple Math (or Google or Candle Count).

To remove spam messages from the Book of Memories, go to the record and select Tributes where you can edit or delete any submitted message.

13. Why won't the DVD render? It's stuck!

If a DVD is stuck in render mode and won't complete, it may have something to do with special characters contained within the file names of photos. There may also be an issue if you've uploaded music for the video. Make sure that the file type is correct for the music. Please contact us to restart the video by submitting a ticket below.

14. Why is the Book of Memories link not posting to our funeral home Facebook page?

The Book of Memories link may not post if the connector hasn't been set up OR the connection is linked to your personal Facebook page rather than your business page.

To set up the Facebook connector, follow these steps:

- In the Main Tab select Book of Memories
- At the bottom of the second column of options, select Facebook Page Management.
- Read the Description and be sure you understand it before selecting Click Here to Begin.
- At the Facebook App, read the description and select the page option you prefer.
- Be sure to select your Facebook **business page** and not your personal page.
- Save.
- Close the tab and return to the FrontRunner system.
- Select the Facebook Record Management option. (Just "Facebook" in newer systems)
- Read the description for the explanation on how to use this section.
- The connector will check and upload any new listings every fifteen minutes.

Should you need to make changes to a listing, you can delete the original on your Facebook page and then Re-Post the updated listing.

15. How do charities receive any donations made through the Book of Memories?

My Tribute Gift handles all online credit card donations. The umbrella charitable organization receives and handles credit card donations for all registered charities in North America. The payment process takes approximately three weeks; the accumulated funds with all the details pertaining to each donation are sent directly to the charity.

If the donor has checked with the charity and the charity states that it never received the money, have them check for any donations from *My Tribute Gift*.

If you have concerns about any donations, you can contact My Tribute Gift directly at 1-855-355-8141, email info@mytributegift.org, or mail to 3495 14th Avenue, Markham, ON, L3R 0H4.

16. How do I turn off donations in the Book of Memories?

Open a record and go to Web Details > Donations. There are three options: “Family Preferred Charities”, “Display to Donor: Charity of your choice”, and “No Donations”. Select No Donations and the Donation option will be removed from the menu within the Book of Memories.

17. How do I remove a former employee from our staff web page?

Website > Edit > Site

Navigate to your staff page and click on Edit Content at top right

In the Staff Listing Control Panel, click on the employee’s name to be removed so it’s highlighted.

Hit Delete

If you would prefer to hide the listing rather than delete it entirely, edit the listing and choose No beside the Visible option. Save.

18. A visitor to our site stated that they lit a candle by credit card but they don’t see the candle lit on the website and they didn’t receive a receipt?

Sign in to the IMS and open the record for the deceased. Go to “Tributes” (in a Web Only record...in a Standard record go to Book Of Memories and then Tributes). In the Tribute section you will be able to see every condolence, shared story, donation, and candle message. If you don’t see the purchasers information and candle message there, you can check the Candle Log in your Simply One Account. That will show all candle purchases through your site in the date range that you set. If you can’t find the candle there, chances are the candle purchase was never completed. After taking those steps, if necessary, send a support ticket to us with all the details, including the name of the deceased, the name of the purchaser, and the date of the purchase, and we’ll see if there ever was a transaction completed.

19. I’m trying to log into my system but I keep getting an error. (Also, “We’ve just gotten a new computer and I can’t find the login page for our system”).

When logging in, be sure that you’re at the correct login page. Verify that the Customer ID number is definitely yours. We have seen people end up at the wrong login page and wonder why their credentials didn’t work. Also remember that the Username and Password are case sensitive, therefore, if you have any capitals in your Username or Password make sure you are entering it that way.

If you've lost the address for your login page due to getting a new computer or from a computer crash, simply go to the home page of your website, scroll right to the bottom of the page and click on "Admin". That will open the login page to your system in a new tab.

20. I keep getting an error message when trying to push records to FrontRunner from SRS, DA, etc.

Check to be sure that you've entered data in all required fields. Also check that you have entered everything correctly, especially email addresses. We generally see errors when a location address has been omitted or entered incorrectly.

21. How do I create a family login, and do families receive email notifications for photos, stories, condolences and donations?

In the first call sheet you will see a section labelled "Family Interactive Edition". Check the box that says "enable". Once you've done that it will generate a username & password, which you can change at any time. You'll also see a field labelled "Family Interactive and Condolence E-mail List". This is where you add the families email address so they receive photo, story, condolence and donation notifications. You can add as many email addresses as you need, just separate each address with a comma.

22. How do I add or remove a user from my system?

Log into the IMS and select System Settings. Once that opens, select "User Profiles" in the first column of options. The page will open to a list of the current users in your system.

To add a new user, click on the "Add User" icon in the upper right of the screen. Enter all their information and be sure to click Save.

To edit the information for a user, or to delete a user, click on their name and the information panel will open. Make the necessary changes and click Save. You'll also see the option in the upper right of the screen to "Delete", which will remove the user completely.

23. Visitors to our website have informed us that they uploaded photo's and stories but they don't see them in the Book of Memories.

In most cases, this is a result of the Photo / Story Approval System being turned on, either for a particular record, or for your entire site.

Log into the IMS and in the Main tab, select Book of Memories. In the second column of options you'll see the "Approve Photos" and "Approve Stories" options. If there are any items there, they will need to be approved or rejected. This will have to be done by the funeral home staff, or by family members that have been provided the login credentials for the Book of Memories.

To turn the approval system on or off for your entire system, once again, in the Main tab select Book of Memories, then Global BOM Settings. You'll see the setting option in the "Default Book of Memories Settings" section. They can be set to On or Off for all records.

You can also turn them On or Off for individual records if required. In the record under the "Book of Memories" Theme section, you'll see the option to either use the Global Settings, or turn the option on or off for that particular record.

[<< Help Resources](#)

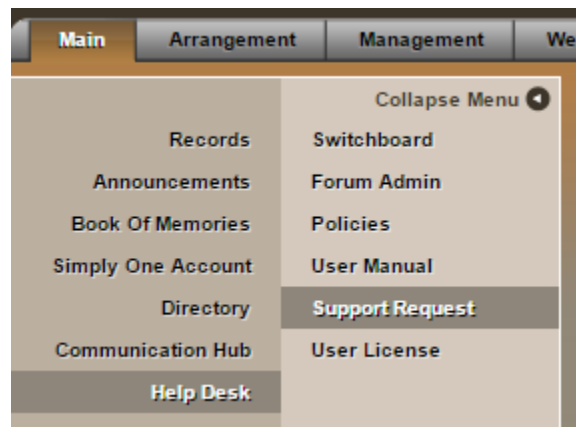
[Submit a Support Ticket >>](#)

Submit a Support Ticket

Please make sure you have checked our other [help resources](#) before submitting a ticket.

To submit a ticket to our support team, navigate to your Main tab > Help Desk > Support Request.

Choose your method of contact.



Fill out the requested fields and be as detailed as possible. Some detail may include:

- Record name
- The area of the system you are using
- Error message, if you received one

When complete, click the 'Send Request' button.

[<< Top Support Questions](#)

[Policies >>](#)

Policies

All FrontRunner policies related to billing, support, and cancellation are listed below. You will also find the ULA (User License Agreement), that outlines all details related to your account with FrontRunner. If you have any questions about any of the policies, don't hesitate to [contact your Success Coach](#).

- [Support Policy](#)
- [Cancellation Policy](#)
- [Payment Policy](#)
- [User License Agreement](#)

[<< Submit a Support Ticket](#)

[Support Policy >>](#)

Support Policy

We take our support policies seriously and when a customer is in need of help, we focus on their needs until a solution is found. With our funeral home background, we treat all Emergency Support requests with the same attention as our customers do when a family calls during their time of need!

Methods of obtaining support:

- **Email or request a phone call:** There is a support form you can fill out which will be emailed to our support team letting them know your question and whether you want an email or call back. Navigate to [Main > Help Desk > Support Request](#).
- **Live Chat:** If this feature is available in your system, you can request a live chat with a support representative. If the chat shows as offline, your question will be emailed to our support team.
- **Emergency After Hours Support:** Our support team is available by phone or email after hours. There is a \$65 fee per phone call (anytime outside of 8am-5pm EST, also including holidays).

[<< Policies](#)

[Cancellation Policy >>](#)

Cancellation Policy

FrontRunner Professional Cancellation Agreement

Confidential

This document contains proprietary information and may not be reproduced, transmitted, or translated in any manner without the specific consent of FrontRunner Professional. This includes third party competitor vendors. All of terms of cancelation are contained in your user license agreement which you agreed to upon activation and continued use of your software where you agreed to provide FrontRunner with 30 days' notice prior to cancellation.

Cancellation Policy Overview

We deeply regret your decision to cancel your system and services with FrontRunner Professional. We genuinely wish that you would have reached out to us and we could have resolved any Issues that may have caused this to happen. At FrontRunner we know your time is valuable and do not engage in the practice of unsolicited phone calls to try and sell you something. Rather, it is our hope that if you have any concerns or issues that you would like to address, that you feel free in contacting us at any time by phone or email and we will help resolve and Issues you are having. Our team of talented and experienced staff are always standing by to help you.

In today's competitive market, funeral firms are facing tremendous pressure from the endless number of new website and management companies, all claiming to have a better product that can save you money. Many use unscrupulous and deceitful tactics to confuse funeral homes that may not be technology savvy. Through Illegal tied selling practices, many funeral homes are being forced to switch their website or management software if they wish to continue to use software that their firm has been using for years. We hope this hasn't be the case with your firm. Furthermore, FrontRunner rigorlessly attempts to create meaningful shared revenue programs to help insure that our technology comes at little to no cost to our clients. Claims of companies citing to save you money, or provide a "no-cost" solution, are simply out of touch with all that our systems generate clients who use them. All these vendors disrespect the loyalty and trust families placed in your firm when providing them with a permanent Book of Memories™ Memorial website as part of your services and all negate the potential liability and backlash this can have with your families when trying to talk you into, or force you into switching.

Sometimes, our clients forget that the Book of Memories permanent memorial websites that have attracted so many new families over the years are very different than anything on the market and was the reason why

they chose FrontRunner over everyone else in the first place. They are cherished and embraced hundreds of thousands of families who use them on a regular basis to interact with family and friends. They were designed to instill loyalty between the families you serve and your firm. In turn FrontRunner had hoped for your loyalty in return.

Contrary to the claims of predatory website companies, the Book of Memories™ records contain information and settings entered by families behind the password protected area that simply cannot be reproduced or brought over in any another website provider. With so many families contacting FrontRunner directly to obtain their username and password for login, most clients have no idea of how many families will be impacted by the cancellation.

We designed our Cancellation Policy to try and help funeral directors avoid falling prey to these schemes and emphasize the consequences on your families and long term effects on the loyalty built in your community. If you find this cancellation policy tough, please understand that it is done so to try and help you avoid falling prey to these schemes.

This is an electronic form allowing you to fill out your details within the editable boxes.

The undersigned acknowledges that the cancellation of the software will result in:

1. Loss of Functionality

- The loss of all Book of Memories™ memorial websites of the deceased that family and friends financially supported through the memorial candle program and were told, through the firm's website, would remain on in perpetuity for future generations.
- The loss of features and functionality that families and the public engaged in with the firm's Book of Memories™ portion of their website, including but not limited to signing up for automated and real time notifications.
- The loss of username and passwords that have been assigned to families either from the firm or through direct contact with FrontRunner. Families will no longer be able to access or use the features and functionality of managing private messages and words of support, e-thank you cards, photo sharing, linkages and other operations.
- The loss of all private condolences saved behind the family login section.
- The immediate break in all linked sites within the social media space connected to the Book of Memories™.

- The loss of the automatic obituary postings as well as all previous postings of records on ObitsForLife.com / BookofMemories.com / ObitTree that families may have been charged by the funeral home to post.
- The loss of all services and solutions such as National and Regional branded programs that are only available to FrontRunner clients.
- The loss of any territory that the firm may have been protected under with the Exclusive client Program offerings of FrontRunner Products and Services.

2. Liability

The cancelation of your system will result in the immediate removal of the Book of Memories™ memorial websites that many families will be utilizing or logged into. Everything they have been working on behind their private logged in area will be lost. This will result in the loss of functionality that the family may be using.

You have financially benefitted from utilizing the Book of Memories™ Memorial Websites that were promoted to the families and public you have served as being kept in perpetuity on your firm's site. The removal of these memorial websites may give rise to claims of liability from families and the public who purchased memorial candles through the firm's website to have the deceased's Book of Memories™ remain as a permanent memorial website, and / or believed they have paid to have these Book of Memories Websites remain in perpetuity as part of the services they paid your firm for in their contract with the funeral home. As such, by virtue of you cancelling your system, you agree to save FrontRunner Professional or any of its affiliates, partners or associates harmless from any potential litigation resulting from the cancellation of the software which could result in lost business or revenue to you, or from any third party or class action claims against the funeral home by any family or public for the lost services or commitments that result from the cancellation.

This liability, both morally and legally requires FrontRunner Professional to electronically notify all family members or member of the public who interacted with and continue to actively interact with these Memorial Websites and inform them that the funeral home has decided to cancel the continuation of the Book of Memories™ Memorial Website for their loved one.

3. Copyright material

You, as the client, acknowledged through the User License Agreement that your system was provided under license and that all content and graphics included with the system remain the property of FrontRunner Professional. Furthermore, you agree not to use or allow any copyright content and licensed graphics that were provided as part of the licensing of the FrontRunner software and owned by FrontRunner to be shared with any third party or new website provider in the creation of your new website. You acknowledge that

certain content such as, but not limited to, condolence messages, stories, poems and shared photos posted by the public may be copyright protected and should only be transferred with the express written consent of the individual or individuals who submitted this content. You further agree that your domain(s) and data cannot be transferred until all outstanding fees and liability sign-off is forwarded to FrontRunner via registered mail.

4. Fees on cancelation

The user acknowledges that there will be a one-time fee of **\$500 (Five hundred dollars) upon cancelation for a backup of the client's website data**. This fee is mandatory and website domains will not be released until paid. Any form of electronic scrapping of data by the client or their new website provider will be deem theft of data without the signoff and will be subject to swift legal action.

For any client cancelling their management system, the fee will be \$1,500 (One thousand Five Hundred Dollars) for a complete data backup of management data and contracts. Payment must be made in full first before data is released.

5. Loss of all services and solutions

Most clients fail to understand all of the integrated components of your website which makes it deferent than anything on the market and used to drive high Search Engine Rankings and more families to their firm. Cancellation of your Website or Management System with FrontRunner will result in the immediate loss of or access to all national and Regional Business Systems, Matrix listings and any other products or services offered by FrontRunner or its affiliated companies. In an effort to help you assist you, we will maintain your system for a period of (6) months and reinstate it at no charge should you find your new service provider is not living up to the expectations you were promised or the service you had become accustom to as a FrontRunner client, provided your territory is still open and territorial business systems are still available in your area.

*Note: In recent times, FrontRunner has been the victim of a relentless, calculated offensive orchestrated by a rival start-up, Funeral Tech. Formed by a small group of disgruntled former FrontRunner employees, most of whom were unable to distinguish themselves within FrontRunner's high-performance culture, Funeral Tech has launched a malicious, disruptive campaign aimed at undermining FrontRunner's credibility, both among its existing clients and within the funeral service community. These attacks have included corporate espionage, relentless attempts at poaching of employees, and engaging in gossip and sophomoric pranks at industry and public events. It has been malicious and hurtful to our entire family, our company and our valued employees. **As such, In order to help reinforce the gravity of your cancelation decision with going to this company, FrontRunner has adopted a tough policy that any existing client that chooses to support these types of business practices and ethics by moving to FuneralTech will forgo their ability to return or access any FrontRunner or its affiliates services or solutions in the future.** Funeral*

Tech has been provided with this cancelation policy and are aware of the ramifications to clients that switch to them.

As always, FrontRunner is committed to working closely with all clients to help resolve any issues or concerns they are having and we encourage you to speak with us prior to any consideration of cancelling your solution.

6. Alternatives to Cancellation

As an alternative to cancellation, we provide you with two options.

Switch to a no cost hosting starter website:

If the cancellation was financially motivated, or done in conjunction with misleading information that caused you to enter into a new contract with a different provider, we offer the option to continue with a free website with zero hosting over the term of the new contract you have signed, or in perpetuity after your contract is fulfilled.

Support all existing Book of Memories™ records online at www.BookofMemories.com or within your new website:

You may opt to keep all your existing Book of Memories™ records online at www.BookofMemories.com for a fee of \$30 per month. This will help avoid any fallout with families and the community after removing records that they supported financially.

If you would like to pursue either of these options, please speak to your Success Coach.

7. Working with Your Local Website Provider

If the decision to cancel is based on you wanting to deal with a local website provider, please know that as funeral professionals ourselves, we respect the importance in working with local companies.

Most local website providers admit that they do not have the expertise to program at the level of the FrontRunner website and provide all of the associated Inter linked websites facing consumers, and if they did, it would be cost-prohibitive to try and do so. However, there is still a lot your local website provider can do with your existing software. Many firms retain local website designers to create the look of the local funeral home's site. Other firms have their local provider manage the website and add all records and content. In addition, FrontRunner has available a plug in Book of Memories feature that your local website provider can easily install on your local website allowing you to maintain all past Book of Memories records, and the ability to continue to add new ones with each new family served. FrontRunner is always pleased to work closely with these local website providers. Talk to your Success Coach if this is something that would help you with your decision.

8. Cancellation Notice

I, the undersigned, acknowledges and accepts the conditions of the cancellation agreement

and am providing a signed copy of this agreement and a valid credit card to cover all fees applicable as set forth in this cancelation agreement. Upon receipt, we ask that FrontRunner unlock all domains you control for our firm.

[<< Support Policy](#)

[Payment Policy >>](#)

Payment Policy

To help ensure a proper billing system for our FrontRunner Professional clients, it is important to outline a payment policy that we feel will benefit yourself and your staff. If you have any questions regarding the payment policy, feel free to email accounting@frontrunner360.com.

All invoices may be viewed through your system. Billing notifications will also be sent to you by email and are expected to be paid within 15 days of the invoice date. Should any invoice exceed the allowable term, a late payment fee may be charged.


If you are a client outside of Canada, you will be billed in U.S dollars.

Late Payment Policy

1. 15 days overdue (30 days after invoice is issued): You will be notified within the system that the invoice is overdue.
2. 45 days overdue (60 days after invoice is issued): FrontRunner reserves the right to automatically deduct the overdue payment from your Simply One Account.
3. 75 days overdue (90 days after invoice is issued): You will be unable to access any features within your FrontRunner system until the invoice is paid in full. Once your invoice is paid, log out of the system and log back in to gain full access.
4. 105 days overdue (120 days after invoice is issued): FrontRunner reserves the right to shut down your website, meaning the website will no longer be visible online to the public.

Payment Options:

Checks / Cheques – Please allow 5 business days for payments to reach us by mail if mailed within Canada and 7-10 business days if mailed within the United States.

 Please make checks / cheques payable to:
FrontRunner Professional
6A Clarence Street
Kingston, Ontario
K7L 5H8, Canada

Please note that for any licensing and hosting fees, we only accept payment made by check / cheque if a client is set up on an annual account

Online payment (by credit card) – if you have not authorized FrontRunner Professional to automatically collect your invoices, and you wish to pay by credit card, you may request a pre-authorization form or you have the choice to pay your invoice online by accessing the administrative portion of your system. We accept Visa, MasterCard, and American Express. All credit card processing is completed by Internet Secure (IS). Internet Secure is a trusted third party processing company that FrontRunner Professional has used for more than 10 years.

Credit Card – the client is required to fill out a pre-authorization form and fax it in to 866-728-0681. This form requires details of your credit card number, address and signature. [Click here for a copy](#) of form or email accounting@frontrunner360.com.

Declined Credit Card Policy

It is the client's responsibility to update any new credit card information to prevent their credit card from being declined. Contact us as soon as you receive your new credit card information to avoid account disruption.

If a client's credit card declines, Internet Secure will notify the owner of the credit card automatically by e-mail. Clients will be subject to a \$25 administration fee.

[<< Cancellation Policy](#)

[User License Agreement >>](#)

User License Agreement

FrontRunner Professional – User License Agreement Amended – July 25, 2015

h3. INTRODUCTION

Please read this USER LICENSE AGREEMENT (“Agreement”) carefully and make sure that you fully understand it. You will have the opportunity to accept or reject the terms of this Agreement during the installation process. You may not activate or use any of the FrontRunner Solutions, herein after called “SOFTWARE”, unless you agree to the terms of this Agreement during the activation process. If you accept the terms of this Agreement and activate the SOFTWARE, you effectively become the USER. The SOFTWARE is a proprietary product of FrontRunner Professional Inc. (“FRP”). It is protected by copyright law and international treaty. Any loading, use, or operation of the SOFTWARE, other than as specifically permitted herein, is unauthorized and in violation of applicable copyright law and international treaty. For purposes of this agreement, SOFTWARE refers to the web based system and associated media (whether DVD, web-based or otherwise), printed materials, provided content, including online and electronic documentation, and all accompanying items. This Agreement may be modified from time to time by FRP at our sole discretion. Upon such modification, the modified agreement will be posted at all times within the Support Help Desk of the SOFTWARE for the USERS to review. Upon any modification to this Agreement, the USERS continued use of the SOFTWARE shall be governed by the modified Agreement and shall be deemed to be an acceptance of the modified Agreement, which for all purposes set forth herein shall be deemed the Agreement. If for any reason the USER does not agree to be bound by any of the modifications, the USER may not continue to use the SOFTWARE or the associated business programs and services affiliated with it.

1. SHARED REVENUE PROGRAMS

The USER will be provided with a number of Shared Revenue Programs which the USER may use. These shared revenue programs include, but are not limited to Memorial Candles, Heartfelt Sympathies Flower Ordering, Heart-in- Diamond, Sympathy Cards, and Sympathy Store. Your percentage of all revenues generated through your system will be placed in the respective Shared Revenue account for each program. Balances can be viewed at all times in your system. FRP reserves the right to debit any Shared Revenue Account for any amounts owing to or billed by FRP for services, including but not limited to hosting fees, support fees, additional service work, domain renewals and upgrades. The entire program is designed to allow clients to fund aggressive online strategies through these newfound revenues without having to spend from their general account.

2. LIMITATION OF USE OF THE SOFTWARE

The USER is authorized to only use the SOFTWARE for its intended purpose in the ordinary course of business solely for the benefit of the USER. The USER is not permitted to translate, disassemble, reverse, compile, or make derivative works of the SOFTWARE, nor may the USER modify or alter any portion of the SOFTWARE, including developing new functionality to the SOFTWARE. The USER shall not post, transmit, re-transmit or store material on or through any of the services or products, which in FRP's sole judgment is (i) in violation of any local, provincial, state or federal law or regulation, (ii) threatening, obscene, indecent, defamatory or that otherwise could adversely affect any individual, group or entity (collectively, "Persons") or (iii) violating the rights of any person, including real or potential infringement rights protected by copyright, trademark, trade secret, patent or other intellectual property or similar laws or regulations. The USER shall not upload any scripts into their hosting space or use the SOFTWARE for any unsolicited emailing or spam activities. The USER acknowledges that any unauthorized use of the SOFTWARE causing any disruption to the function of the web servers or breaches of security will result in a breach of this Agreement and may result in the immediate termination thereof. The USER may access and use the SOFTWARE from any computer at any location where there is an Internet connection. Where multiple user access is granted under the license, multiple individuals may log into the SOFTWARE simultaneously from multiple locations.

3. INTELLECTUAL PROPERTY RIGHTS

All title and intellectual property rights in and to the SOFTWARE (including but not limited to any images, content, photographs, animations, video, audio, music, text and applets, incorporated into the SOFTWARE), the accompanying printed materials, are owned or licensed by FRP. The SOFTWARE is licensed, not sold. In the event of any cancelation of use of the software, any copying or electronic scrape of any data, content, graphics or any other copyright or trademark materials by the USER or the USER's agent into any newly transferred website will constitute theft and will be governed by strict legal enforcement. All title and intellectual property rights associated with the content that is not contained in the SOFTWARE but may be accessed through use of the SOFTWARE, is the property of the respective content owner and may be protected by applicable copyright or other intellectual property laws and treaties. Use of any online services which may be accessed through the SOFTWARE may be governed by the respective terms of use relating to such services.

4. PASSWORD AND SECURITY

FRP shall provide an initial password and account designation for the USER. It is recommended that a USER change the initial password the first time the SOFTWARE is accessed and monthly thereafter. The USER is solely responsible for maintaining the confidentiality of the USER passwords and accounts, and is fully responsible for all activities occurring under the USER passwords or accounts. The USER agrees to notify FRP immediately if they notice unauthorized use of their password or account or any other breach of security. FRP cannot and will not be liable for any damage or loss arising from a USER's failure to comply with this section.

5. EQUIPMENT FOR YOUR USE

The USER shall be responsible for obtaining and maintaining all telephones, computer hardware, Internet access points and other equipment needed for access to and use of the SOFTWARE and for any/all charges related thereto.

6. SUPPORT

Basic support as provided with the SOFTWARE at no-charge and includes access to an online User Manual / Videos and the ability to contact FRP via email if the SOFTWARE is malfunctioning. Basic support also includes assisting a USER via e-mail or other electronic means with information on how to use the SOFTWARE. In the event that the USER cannot find the answer to a question through the Support Help Desk options, the USER may submit an email support request detailing the problem. Email support is checked frequently throughout the day however, FRP reserves the right to respond to support e-mails within a 48 hour period during regular business hours. Regular business hours are Monday – Friday, 8am to 5pm EST. Should the USER require support via phone, a fee of \$45 per incident during business hours and \$65 per incident after hours will be automatically charged against the USER'S portion of their Shared Revenue accounts.

7. TRAINING

Each System include a no-charge 2 day training session for up to (2) staff at the Technology Center located at 6A Clarence Street Kingston Ontario Canada. Additional One-on-one over the phone training can be purchased for an additional fee as well as training sessions at the FrontRunner Training Center located at 6A Clarence Street Kingston Ontario Canada.

8. CONTENT CONTROL

All content and graphics provided by FRP as part of the website and SOFTWARE shall remain the property of FRP and may not be reproduced or copied. All custom USER Content input by the USER and stored on FRP server computers shall at all times remain the property of the USER. All content submitted by the public will remain the property of the individual submitting and will be strictly protected against any unauthorized access or use by any FRP personnel or other agent without the express written consent of the author other than outside the normal course of server administration by the authorized server administrator. The USER will only use the SOFTWARE and services for lawful purposes and the USER will not store or provide any content, graphics, images or user content, or link to any material that violates foreign, federal, state or local law, or is deemed generally offensive. Should FRP become aware that the USER has violated this section, FRP may, at our option, remove the content, graphics, images or user content in violation and immediately terminate this Agreement. If hosting is terminated, FRP, at its sole discretion, may reinstate hosting upon adequate showing of the USER's right to use the content, graphics, images or user content. All content on the USER's website must be legally obtained and not in violation of copyright law. This includes content transferred by FRP from USER's existing website to the new FRP website, as well as all website content that is subsequently added by USER. If USER is unsure if content on their previous website is

copyrighted, USER should contact their previous website provider prior to transferring their content. FRP will not be held responsible for legal and/or financial charges resulting from a copyright infringement.

9. OTHER CONTENT OR SERVICES

Through the USER's use of the SOFTWARE, the USER may receive content or services provided through, or in connection with, individuals or entities other than FRP including, without limitation, data, links, articles, graphic or video messages, photographs, text, software, music, sound, graphics or other materials or services (collectively, the "Other Content or Services"). The USER understands and agrees that they will not obtain, as a result of the use of the SOFTWARE, any right, title or interest in or to such Other Content or Services delivered via the SOFTWARE or in any intellectual property rights (including, without limitation, any copyrights, patents, trademarks, trade secrets or other rights) in and to such Other Content or Services. FRP hereby expressly disclaims any liability for any such Other Content or Services, including but not limited to any errors or omissions in any such Other Content or Services, or for loss or damage or injury of any kind incurred as a result of the use of any such Other Content or Services posted, transmitted, advertised or otherwise made available to the USER through or in connection with the SOFTWARE.

10. MODIFICATIONS TO THE SOFTWARE

FRP reserves the right at any time to disable, enable, modify, or discontinue, temporarily or permanently, any features or functions of the SOFTWARE, with or without notice, obligation or liability to the USER or to any third party.

11. UPGRADES

FRP will continue to add new applications and features to the SOFTWARE to help ensure the USER always has the most advanced offerings on the market. Under the new Pulse Business System, all upgrades to the SOFTWARE will be at no-charge to the USER. In some cases however, new features or applications, products will be at an additional cost.

12. HOSTING / LICENSING FEES

FRP will provide dedicated server computers with an Internet address for storage and access of content, USER content, and the web based SOFTWARE, equivalent with best practices and reasonable commercial standards. FRP will employ best efforts in providing advance notice to USERS of scheduled server computer/network outages. Hosting fees will be billed annually or quarterly at the USER option. Hosting / Licensing fees will be subject to change. FrontRunner reserves the right to debit the USER's shared revenue accounts for any outstanding monies owed.

13. ADDITIONAL HOSTING FEES

The USER acknowledges that a number of National and Regional Marketing Business Systems added by the USER will require additional Hosting and Listings Fees over and above their normal system hosting fee.

14. MANAGED DOMAIN HOSTING

All domain names purchased through or switched to FRP will be registered to and owned by the USER. In consideration of the domain names purchased for the USER by FRP, the USER agrees to pay FRP at the time service is provided. The minimum period for the registration of a domain name will be one year. When the USER registers or transfers a domain name, the domain name(s) will be automatically renewed for an additional year unless FRP is previously advised of a change within 60 days of the renewal period. If for any reason FRP is not able to take the payment from the USER, and the USER fails to respond to our notices, the domain name registration will be allowed to expire. It is the USER's responsibility to keep their contact information current, along with payment method information and the expiration date if using a credit card.

15. EMAIL POLICY

FRP does not host or provide an email service but suggests the use of Google's email solutions. This is done to ensure peace of mind and maximum privacy to the USER and alleviates any concerns about emails being seen by FRP. Any fees incurred by the USER with regards to their Google accounts will be paid to Google directly. FRP does provide an initial account set-up service that will come at a cost to the USER. Any software set-up for mail clients such as Outlook, Thunderbird, etc. or any mobile mail clients are the sole responsibility of the USER.

16. DATA BACK-UP

FRP will back-up the SOFTWARE content and records in a commercially reasonable manner on a daily basis. FRP will not be responsible for lost content or lost User content. FRP will provide, at the USER's expense, an electronic copy of the backup content and records in a CSV file format upon written request. Standard back-ups are intended for disaster recovery, not the restoration of individual files. As with any software, traditional or web based, client data files can be accidentally deleted by USERS and may require re-input by USERS in these situations.

17. RECORD SCRAPES

If the USER requests a record scrape from their old management system or website, FRP will, for a fee, make every effort to accurately bring over the existing data. The USER understands and acknowledges that from time to time, other companies will rearrange or modify a USER's data to make it difficult, if not impossible, for FRP to successfully capture all information. As such, we request that the USER attempt to provide FRP with a clean, CSV-formatted file. The USER agrees to save FRP harmless if the data integrity and accuracy of the scraped records are not successfully reflected in the USER's new SOFTWARE. The USER further acknowledges that it is their responsibility to verify the records are correct and that the cost of the record scrape will still become due and payable even if the process is unsuccessful.

18. CONTENT SCRAPES

The USER understands and acknowledges that FRP will make every effort to bring content over from the client's existing website but cannot guarantee its accuracy unless provided in a digital Microsoft Word

Document provided to us by the client. Additionally, the USER agrees to save FRP harmless from any litigation resulting from the transfer of any copyright protected copy or images that have been used on their existing site, or that the client adds to their new website at any time in the future.

19. PAYMENT PLANS

The USER opting to use the payment option agrees to pay FRP the current published rate at the time of signing this Agreement. At the end of the payment option period, the USER will continue to pay a monthly fee for hosting / licensing of the SOFTWARE according to the terms and conditions published at the time of signing. The USER and FRP acknowledge that the monthly fee for hosting / licensing may be subject to change over time. The USER agrees that in the event of cancellation by either party prior the complete payment option period, the full amount of the remaining SOFTWARE price will become payable immediately. The USER also agrees to allow any revenue generated funds from the SOFTWARE to first go towards any outstanding balances owed to FRP.

20. DISCLAIMER OF WARRANTIES AND LIMITATION OF LIABILITY

Under no circumstances, including negligence, will FRP be liable to the USER or anyone else for any indirect, special, incidental, punitive, exemplary or consequential damages (including damages that arise from loss of anticipated revenue, loss of information or material of any kind, loss of profits, loss of business and injury to property, even if FRP have been advised of the possibility of such damages) that arise in connection with or as a result of USER's use or inability to use the SOFTWARE or liability with hosted domains. These include but are not limited to the USER's reliance on any materials, content, information, websites, software or products obtained on the website, or mistakes, omissions, interruptions, communications failures, deletion of files or emails, errors, defects, viruses, Trojan horses, delays in operation or transmission, or any failure of performance, or theft, destruction or unauthorized access to your records, programs or websites. Some states and provinces do not allow the exclusion or limitation of liability for consequential or incidental damages and in such states and provinces, FRP's liability is limited to the greatest extent permitted by law.

21. TERMINATION

FRP reserves the right to discontinue any Internet-based services provided to the USER or made available to the USER through the use of or in connection with the SOFTWARE if the USER does not abide by the terms and conditions of this Agreement or should any relevant remunerations, purchasing commitments and/or payments not be made by the USER to FRP. Furthermore, FRP reserves the right to terminate services to any USER that engages in any unnecessary, rude and abusive behavior with any FRP staff during the time of FRP's attempts to assist the USER. This Agreement may be terminated by the non-defaulting party if a party fails to perform or comply with this Agreement or any provision hereof. Either party may terminate this Agreement for convenience at any time upon the giving of thirty (30) days written notice.

22. SERVICE CANCELLATION

The USER may cancel the SOFTWARE by sending an e-mail to cancellation@FrontRunner360.com to request discontinuance of the SOFTWARE. The USER will be required to sign the SERVICE CANCELLATION AGREEMENT, which will be provided by FRP. The USER will also cease the use of and destroy all materials including graphics and content obtained from the SOFTWARE or from FRP. The USER is encouraged to review all of the legal requirements surrounding the cancellation of their system, as it may seriously impact existing families' usage, which could result in legal action against the USER by the family. The USER acknowledges that the FRP system is much more than a website; it is highly interactive SOFTWARE that allows by-the-minute interactivity with families, the public and the communities the USER serves depending on features selected. The USER will remain liable for all outstanding payments and fees due at the time of cancellation. The USER further agrees that the USER's domain and data cannot be transferred until all outstanding fees and liability sign-off is forwarded to FRP via registered mail.

23. MISCELLANEOUS

This Agreement will be governed by and construed under the laws of the Province of Ontario Canada without reference to its choice of law principles. The USER consents to the jurisdiction and venue of the courts of the Province of Ontario Canada.

24. ACCEPTANCE

By selecting the "I ACCEPT" button (On-Line User License Agreement), the USER hereby agrees to all terms contained within. Following acceptance, the button will no longer appear, indicating that the USER accepted this Agreement during activation.

[<< Payment Policy](#)

[Frequently Asked Questions >>](#)

Frequently Asked Questions

Here are topics of common questions regarding different areas of your system.

- [Book of Memories](#)
- [Forms](#)
- [General](#)
- [Management](#)
- [Memorial Candles for the Funeral Home](#)
- [Memorial Candles for the Purchaser](#)
- [Records](#)
- [Stationery](#)
- [Website](#)

[<< User License Agreement](#)

[Training Documentation >>](#)

Training Documentation

Below you will find a link to each system type. Within each, we have provided a breakdown of each of the training sessions that will take place. Click on each link for information on that topic. From there, you will find a print icon located in the top right. Please feel free to print off each section or bookmark this page for future help.

- [Book of Memories Standalone](#)
- [Perfect Website](#)
- [WebSuite](#)
- [Total Business Solution](#)

[<< Frequently Asked Questions](#)

[Book of Memories Standalone >>](#)

Book of Memories Standalone

For Book of Memories Standalone clients, we have provided a breakdown of each of the training sessions that will take place. Click on each link for information on that topic. From there, you will find a print icon located in the top right. Please feel free to print off each section or bookmark this page for future help.

Training 1: System Setup, Creating a Record, and Book of Memories Overview

- [Your FrontRunner Desktop](#)
- [Records](#)
- [Announcements](#)
- [Global BOM Settings](#)
- [Approve Photos](#)
- [Approve Stories](#)
- [SimplyOne Account](#)

System Setup

- [System Profile](#)
- [General Settings](#)
- [Flower Order Settings](#)
- [Frequent Charities](#)
- [Add & Edit Users in System](#)
- [Databases](#)

Create a Record

- [Intro to Creating a Record](#)
- [Family Login](#)
- [Add Place of Death](#)
- [Add Clergy](#)
- [Add Charitable Donations](#)
- [Add Service Details](#)
- [Add Notice](#)

Book of Memories Features

- [Select a Theme](#)
- [Add Photos](#)
- [Memorial Program](#)
- [Photographic Memories](#)
- [Service Recording](#)
- [Tributes](#)
- [Insignias](#)
- [Print Condolences](#)
- [Book of Memories Overview](#)

[<< Training Documentation](#)

[Perfect Website >>](#)

Perfect Website

For Perfect Website clients, we have provided a breakdown of each of the training sessions that will take place. Click on each link for information on that topic. From there, you will find a print icon located in the top right. Please feel free to print off each section or bookmark this page for future help.

Training 1: System Setup, Creating a Record, and Book of Memories Overview

Desktop/Main Overview

- [Your FrontRunner Desktop](#)
- [Records](#)
- [Announcements](#)
- [Global BOM Settings](#)
- [Approve Photos](#)
- [Approve Stories](#)
- [SimplyOne Account](#)

System Setup

- [System Profile](#)
- [General Settings](#)
- [Flower Order Settings](#)
- [Frequent Charities](#)
- [Add & Edit Users in System](#)
- [Databases](#)

Create a Record

- [Intro to Creating a Record](#)
- [Family Login](#)
- [Add Place of Death](#)
- [Add Clergy](#)
- [Add Charitable Donations](#)
- [Add Service Details](#)
- [Add Notice](#)

Book of Memories Features

- [Select a Theme](#)
- [Add Photos](#)
- [Memorial Program](#)
- [Photographic Memories](#)
- [Service Recording](#)
- [Tributes](#)
- [Insignias](#)
- [Print Condolences](#)
- [Book of Memories Overview](#)

Training 2: Website Editing

- [Intro to Website Editing](#)
- [Editing the Home Page](#)
- [Add Photo](#)
- [Create Link/Hyperlink](#)
- [Add Staff Members](#)
- [Add Facility Photos](#)
- [Add Products](#)
- [Add Business Listing](#)
- [Managing Your Website](#)
- [Organize Pages](#)
- [Create a New Page](#)
- [Page Settings](#)
- [Upload a File](#)
- [Making Your Website Changes Live](#)

Marketing Center

- [Ad Library](#)

[<< Book of Memories Standalone](#)

[WebSuite >>](#)

WebSuite

For WebSuite clients, we have provided a breakdown of each of the training sessions that will take place. Click on each link for information on that topic. From there, you will find a print icon located in the top right. Please feel free to print off each section or bookmark this page for future help.

Training 1: System Setup, Creating a Record, and Book of Memories Overview

Desktop/Main Overview

- [Your FrontRunner Desktop](#)
- [Records](#)
- [Announcements](#)
- [Global BOM Settings](#)
- [Approve Photos](#)
- [Approve Stories](#)
- [SimplyOne Account](#)

System Setup

- [System Profile](#)
- [General Settings](#)
- [Flower Order Settings](#)
- [Frequent Charities](#)
- [Add & Edit Users in System](#)
- [Databases](#)

Create a Record

- [Intro to Creating a Record](#)
- [Family Login](#)
- [Add Place of Death](#)
- [Add Clergy](#)
- [Add Charitable Donations](#)
- [Add Service Details](#)
- [Add Notice](#)

Book of Memories Features

- [Select a Theme](#)
- [Add Photos](#)
- [Memorial Program](#)
- [Photographic Memories](#)
- [Service Recording](#)
- [Tributes](#)
- [Insignias](#)
- [Print Condolences](#)
- [Book of Memories Overview](#)

Training 2: Website Editing

- [Intro to Website Editing](#)
- [Editing the Home Page](#)
- [Add Photo](#)
- [Create Link/Hyperlink](#)
- [Add Staff Members](#)
- [Add Facility Photos](#)
- [Add Products](#)
- [Add Business Listing](#)
- [Managing Your Website](#)
- [Organize Pages](#)
- [Create a New Page](#)
- [Page Settings](#)
- [Upload a File](#)
- [Making Your Website Changes Live](#)

Training 3: Virtual Showroom

- [Intro to Virtual Showroom](#)
- [Create a Virtual Showroom](#)
- [Edit a Virtual Showroom](#)
- [Launch a Virtual Showroom](#)

Marketing Center

- [Ad Library](#)

[<< Perfect Website](#)

[Total Business Solution >>](#)

Total Business Solution

Below is a breakdown of each of the training sessions that will take place. Click on each link for information on that topic. From there, you will find a print icon located in the top right. Please feel free to print off each section or bookmark this page for future help.

Training 1, part 1: System Setup

Desktop/Main Overview

- [Your FrontRunner Desktop](#)
- [Records](#)
- [Announcements](#)
- [Global BOM Settings](#)
- [Approve Photos](#)
- [Approve Stories](#)
- [SimplyOne Account](#)
- [Directory](#)

System Setup

- [System Profile](#)
- [General Settings](#)
- [Flower Order Settings](#)
- [Frequent Charities](#)
- [Databases > Charities](#)
- [Products](#)

Data Setup

- [Quickfill & System Data](#)
- [Employee Maintenance](#)
- [Obituary Templates](#)
- [Invoice Setup](#)

Pricing Setup

- [Package Pricing](#)

Arranging Director Admin

- [Change an At Need Contract Number](#)
- [Change a Preneed Contract Number](#)
- [Void an At Need Contract](#)
- [Void a Preneed Contract](#)
- [Delete an AddOn](#)
- [Sales Tax Setup](#)
- [Maintain Forms](#)
- [Define Default Data Field Visibility on Client Screens](#)
- [Configure Text Message Notifications](#)
- [Maintain Password and User Accounts](#)
- [Email Address\(es\) to Use for Obituary Communications](#)

Training 1, part 2: Create a Record, Book of Memories Overview

- [Create a Record](#)
- [Book of Memories Overview](#)

Training 2: Website Editing

- [Intro to Website Editing](#)
- [Editing the Home Page](#)
- [Add Photo](#)
- [Create Link/Hyperlink](#)
- [Add Staff Members](#)
- [Add Facility Photos](#)
- [Add Products](#)
- [Add Business Listing](#)
- [Managing Your Website](#)
- [Organize Pages](#)
- [Create a New Page](#)
- [Page Settings](#)
- [Upload a File](#)
- [Making Your Website Changes Live](#)

Training 3: Virtual Showroom

- [Create a Virtual Showroom](#)
- [Edit a Virtual Showroom](#)
- [Launch a Virtual Showroom](#)

Marketing Center

- [Ad Library](#)

[<< WebSuite](#)

[Getting Started with Your System >>](#)

Getting Started with Your System

Once you login to your FrontRunner system, you will be able to access everything you need to manage your records, website, forms, showrooms, stationery, dvd creator, the Book of Memories, marketing tools and so much more. The pages listed below cover off all aspects of your system settings, which need to be current at all times. The information entered here helps populate many of the various features throughout the system. You can access and update the settings at any time.

- [Your FrontRunner Desktop](#)
- [System Profile](#)
- [General Settings](#)
- [Flower Order Settings](#)
- [Frequent Charities](#)
- [Add & Edit Users in System](#)
- [Databases](#)
- [Product Database](#)
- [Billing Options](#)
- [FAQs on General Issues](#)

[<< Total Business Solution](#)

[Your FrontRunner Desktop >>](#)

Your FrontRunner Desktop

The Main desktop appears after login. The grey tabs across the top link to the main applications of the system and remain visible and accessible at all times. The information below covers the primary functions of left side menu items including Records, Announcements, Book of Memories Settings, SimplyOne (billing) account, Directory, and Help Desk.



The QuickLaunch button at the bottom left of your browser window provides quick access to different areas of this system including the Logout link.

[<< Getting Started with Your System](#)

[Records >>](#)

Records

This section allows you to quickly access or create a new record.

Navigate to Main > Records.

The Records section, by default, will display all current records. To view any other types of records, select a category from the secondary navigation.

Select the **Advanced Search** button, to widen the search to:

- First Name
- Last Name
- Client Number
- Date of Death
- Service Date
- Assigned Director – use the drop down to select the name of the funeral director. Note: These names pull from your [User Profiles](#).

The order of the records can be changed within the record search. Select any one of the column titles above the names.

Client Name	Client Number	Date of Death	Service Date	Branch	Web Status
-------------	---------------	---------------	--------------	--------	------------

Add a New Record ▼

Mouse over **Add a New Record** to see the types of records. Select one to begin creating a record:

- Standard Record – this type of record allows you to enter all detailed information required for forms.
- Web Only Record – this type of record allows you to enter information only needed for the website. You may choose the record for quick entry and switch to a standard record later.
- Pre-Need Record – this type of record allows you to pre-arrange a funeral. It can be switched from a pre-need to an at-need (standard record) at a later date.
- Book of Memories – this type of record can be used for families who have not used your services but would like a Book of Memories for their loved one. It will be posted on your website the same way as all others.

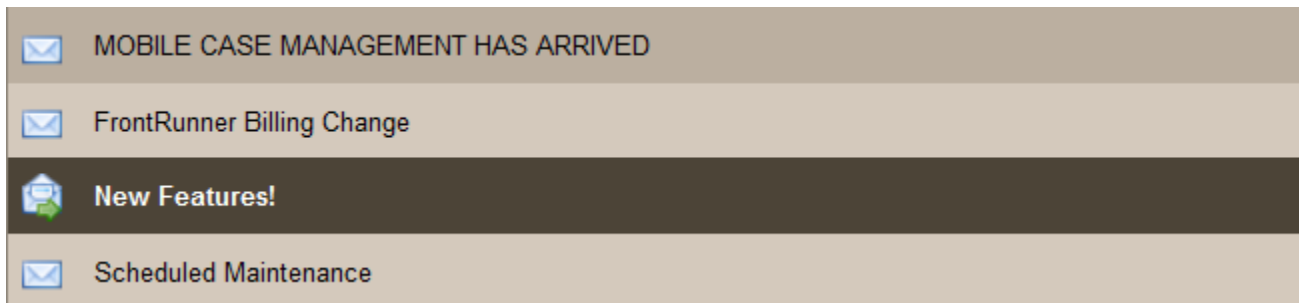
[<< Your FrontRunner Desktop /](#)

[Announcements >>](#)

Announcements

Check out the latest announcements from FrontRunner Professional.

Navigate to Main > Announcements.



When an announcement is selected, a pop-up window provides three options:

- Previous – will go to the previous message
- Archive Message – will save your messages in an archived section
- Next – will go to the next message

Archived messages will become visible if you select 'Show archived messages' found at the bottom of the announcements list. Once clicked, the archived announcements show at the bottom of the list.

[<< Records](#) /

[Book of Memories Settings >>](#)

Book of Memories Settings

Learn about the settings in your Book of Memories. Some of the information you will find in the secondary navigation is for information purposes only.

Navigate to Main > Book of Memories.

Below you will find a breakdown of other pages and how they work.

- [Global BOM Settings](#)
- [Approve Photos](#)
- [Approve Stories](#)

[<< Announcements](#) /

[Global BOM Settings >>](#)

Global BOM Settings

The Global Book of Memories section allows you to set up your captcha preference, date formats, rotation options for photo frame, and the approval process for photos and stories.

Navigate to your Main > Book of Memories > Global BOM Settings.

Global BOM Settings Save Settings

Global Book of Memories™ Settings

Settings in this section are in effect for all Book of Memories™ records on your site

Display BOM Tunnel Page ☒

Captcha Preference for BOM Pages Simple Math Captcha

Default Book of Memories™ Settings

All Settings in this section are in effect unless over-ridden by record-specific settings.

Photo Approval System Off for all records

Story Approval System Off for all records

BOM Menu DOB / DOD Format Mar 1, 2014

* NOTE: This setting will only affect the formatting of the date of birth and death located above the left-hand menu in TN, BOFL, and Bass Mollett themes. Other themes, which display the year of birth and death in the header, are not affected.

BOM Service Details DOB / DOD Format Saturday March 1st, 2014

* NOTE: This determines how the date of birth and death are displayed in the body of the service details page.

Photo Frame Images Primary Photo Only (No Rotation)

* NOTE: Active Photo Only will show the Primary Photo if it exists, or the first photo (if photo approval is on, must be an approved photo), or a placeholder image.

Global Book of Memories Settings

- **Display BOM Tunnel Page:** Check the box for a tunnel (main) page of the Book of Memories to open when a record is selected on the website.
- **Captcha Preference for BOM Pages:** In order to eliminate spam/junk messages from being submitted, a captcha will ensure that anyone who submits a form is in fact a real person. Click on the drop-down to choose one of the options. We recommend using Simple Math.

Default Book of Memories Settings

These are the default settings, which you can override, if necessary, within individual records on the Theme page > Book of Memories Settings.

- Photo Approval – choose 'On for all records' if you want the family or funeral firm to approve the photos before they go publicly on the Book of Memories.
- Story Approval – choose 'On for all records' if you want the family or funeral firm to approve the stories before they go publicly on the Book of Memories.
- BOM Menu DOB/DOD Format – select how the date of birth and date of death should appear (ex. 2014-06-30 or June 30, 2014)
- BOM Service Details DOB/DOD Format – select how the date of birth and date of death should appear (ex. 2014-06-30 or June 30, 2014) within the service details. This setting only applies to date formatting above the menu in specific themes.

! The above two settings (relating to date formats) will only affect the formatting located above the left-hand menu in TN, BOFL, and Bass Mollett themes. Other themes, which display the year of birth and death in the header, are not affected.

- Photo Frame Images (photo frame in top banner of Book of Memories) – select one of the following:
 1. **All Photos** – Every photo uploaded, to a record or by online visitors, will be placed in the rotation.
 2. **Primary Photo Only (No Rotation)** – Only the photo selected as the primary photo within a record will display.
 3. **Active Photo Only (No Rotation)** – Will display either the primary photo (if one has been designated), the first photo in [Manage Photos](#), or a place-holder image if no photos are added to a record.


[<< Book of Memories Settings](#) /

[Approve Photos >>](#)

Approve Photos

Any online visitor who shares a photo, and if the funeral home has the approval process turned on, will allow the funeral home to approve any photos that have been uploaded within the Book of Memories.

Navigate to your Main tab > Book of Memories > Approve Photos.

Approve Photos		
Approve	Remove	Preview (click to enlarge)
<input type="radio"/>	<input type="radio"/>	 <div style="float: right; width: 150px;"> <p>Title: <u>Waterfall</u></p> <p>Description:</p> </div>

For any photo(s) you approve, click inside the 'Approve' radio button beside the photo(s). For any photo(s) you do not approve, click inside the 'Remove' radio button beside the photo(s). To approve or reject all photos, use the buttons in the top right.

When complete, select the  button.

Any photos that were approved, will now appear within the Book of Memories.



If you wish to turn the approval process off, refer to the [Global BOM Settings](#) page. If you would like to leave the approval process up to the family, make sure you have [created and provided them with a login](#) to their loved one's Book of Memories.

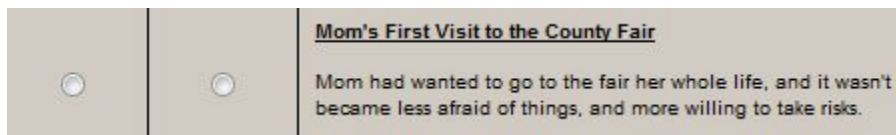
[<< Global BOM Settings /](#)

[Approve Stories >>](#)

Approve Stories

Any online visitor who shares a photo, and if the funeral home has the approval process turned on, will allow the funeral home to approve any photos that have been uploaded within the Book of Memories.

Navigate to Main > Book of Memories > Approve Photos.



For any photo(s) you approve, click inside the 'Approve' radio button beside the photo(s). For any photo(s) you do not approve, click inside the 'Remove' radio button beside the photo(s). To approve or reject all photos, use the buttons in the top right.

When complete, select the  button.

Any photos that were approved, will now appear within the Book of Memories.

* If you wish to turn the approval process off, refer to the [Global BOM Settings](#) page. If you would like to leave the approval process up to the family, make sure you have [created and provided them with a login](#) to their loved one's Book of Memories.

[<< Approve Photos](#) /

[Facebook Integration Setup >>](#)

Facebook Integration Setup

Facebook is a great tool for individuals, businesses, organizations, and brands to share their stories and connect with people, including potential clients.

Facebook Pages, like timelines, can be customized by adding apps, posting stories, hosting events, and more. Engage and grow your audience by posting regularly. People who like your Page and their friends will see updates in their News Feeds.

You can [create a Facebook page](#) through your personal account.

* Note: Only the official representative of an organization, business, celebrity or band is permitted to create a Facebook Page.



* If you would like to activate the Facebook Integration in your system, [contact your Success Coach](#).

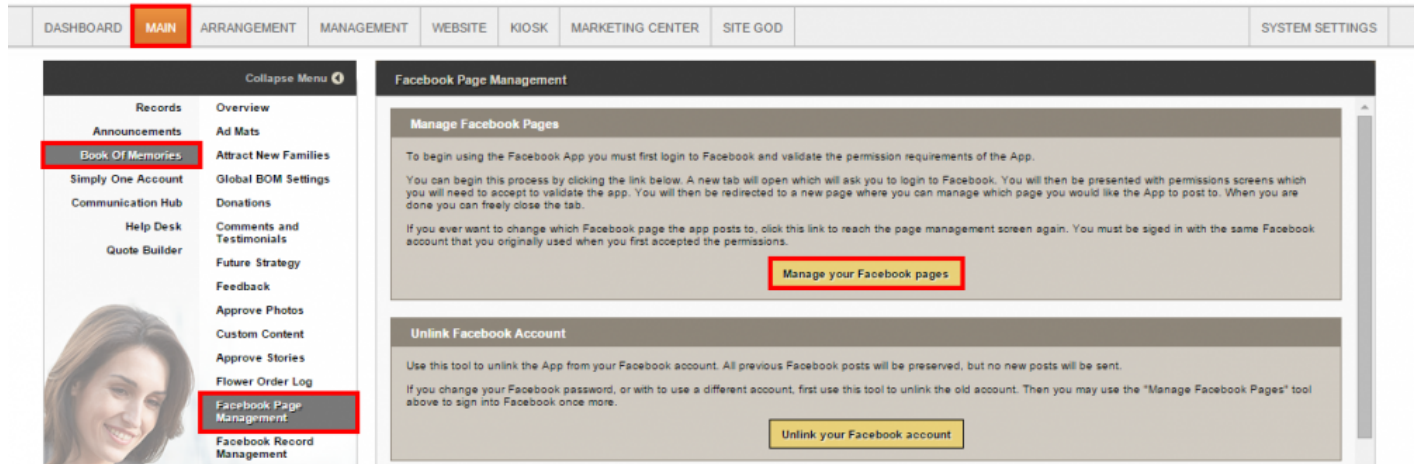
Facebook Integration

Funeral homes can easily post online obituaries to their Facebook Page through the Book of Memories with minimal set-up required. This will allow anyone who has liked your Facebook Page to view your recent services and connect to their Book of Memories on your website to read the full obituary, service details, leave condolences and also link back to your funeral home website. This is particularly helpful in communities where local newspapers don't publish every day and you want to be able to connect with your community at large faster.

Connect Your Facebook Page

Main > Book Of Memories > Facebook Page Management > Manage Facebook Pages

1. Under the section **Manage Facebook Pages**, select the **Manage your Facebook pages** to begin.



2. A new window will open with your Facebook account logged in. If you are not already logged in, please log in now.

3. You will be prompted with a couple of permission notifications. To proceed, please follow the prompts:

Obituaries will receive the following info: your public profile. ⓘ

[Review the info you provide](#)

🔒 This does not let the app post to Facebook.

[Privacy Policy](#)

Cancel

Okay

Prompt 1:



Obituaries would like to post to Facebook for you.
Who do you want to share these posts with?

 Friends ▼

Not Now

Okay

Prompt 2:

Obituaries would like to manage your Pages and publish as
Pages you manage.

[Choose what you allow](#)

Not Now

Okay

Prompt 3:

Prompt 4: If you have multiple profiles attached to one account (Personal & Business Pages), you will be asked to select which Page you would like to connect to. Use the dropdown for Page Options to select your Business Page.



Facebook App Save

Description

Thank you for connecting to the Facebook App.

We have accessed your account and have found the following pages under your Facebook login below. Please select which page you would like your obits posted to and then click 'Save'.

Once you have selected your page and clicked 'Save' it is safe to close this tab / window.

Page Options

☐ Use my main page

☒ Pages Available:

Disconnect your Facebook Page Account

Should you need to disconnect and unlink your Facebook Page account, select the Unlink your Facebook account. We have also provided a Troubleshooting help section under the Unlink Facebook Account section.

Unlink Facebook Account

Use this tool to unlink the App from your Facebook account. All previous Facebook posts will be preserved, but no new posts will be sent.

If you change your Facebook password, or wish to use a different account, first use this tool to unlink the old account. Then you may use the "Manage Facebook Pages" tool above to sign into Facebook once more.

[Unlink your Facebook account](#)

Facebook Troubleshooting

Facebook Record Log shows "Pending," even after clicking "Post all pending records:"

- Either no Facebook account was connected, or one was connected but not saved. Click "Manage your Facebook pages," follow any prompts that may appear, and make sure you click "Save" after selecting which page to post to.

Facebook posts to the wrong account:

- The Frontrunner app will attempt to connect to whatever Facebook account is currently logged in on your computer any time you click the "Manage your Facebook pages" button.
- To change the Facebook account used by the app, first [visit Facebook](#) and log out of any accounts. Then, click the "Unlink your Facebook account" button above to remove the incorrect Facebook account. Finally, click "Manage your Facebook pages" and sign in to the desired Facebook account. Make sure you accept all permissions, and click "Save" after selecting which page to post to. Frontrunner will remember this account once you click "Save," so you can sign out and use another Facebook account if you so desire.
- If you ever wish to manage your Facebook pages again, click the link once more. Ensure you are signed in to the correct Facebook account before you do this.

Facebook Record Log shows "Permissions Error" or something similar with a code of 200:

- Your Facebook permissions have been reset, or were not all accepted when they were connected. First, click the "Unlink your Facebook account" button above to remove your Facebook account, and then click "Manage your Facebook pages" to connect to Facebook once more. Make sure you accept all permissions, and click "Save" after selecting which page to post to.

Facebook Record Log shows a message with a code of 190:

- Something may have changed on your Facebook account, such as changing your password, or revoking permissions to the Frontrunner Obituaries app. First, click the "Unlink your Facebook account" button above to remove your Facebook account, and then click "Manage your Facebook pages" to connect to Facebook once more. Make sure you accept all permissions, and click "Save" after selecting which page to post to.

Post Obituary to Facebook

Web Only & Standard Record: [Click Here to Push Obituaries to Facebook](#)

Facebook Record Management



Facebook searches for new records every 15 minutes; your record will auto post at that time.

[Highlights ▾](#)

Status
 Photo / Video
 Event, Milestone +

K.W. Montroy Funeral Home
 Wednesday via Obituaries

Rose Harper - 2012-10-05
 Peacefully while in the loving presence of his family on October 5th, 2012. Beloved child of and . Cherished Brother of . Missed by his . Loving Grandfather of . Will be remembered by his children, . Visitation to be held at Friends Funeral Service, on October 9th, 2012, at 12:00pm - 1:45pm. Service to be held at K.W. Montroy Funeral Home, on October 9th at 2:00pm. If you so desire, donations to , , , or would be appreciated.

Zander Funeral Home
 Published: 2012-12-05 14:01:02 EST

[Like](#) · [Comment](#)

K.W. Montroy Funeral Home
 Wednesday via Obituaries

Joyce Barnes - 2012-08-21
 Joyce Marie Barnes, 73, passed away on August 21st, 2012, in Kingston, ON. she was born in Kingston, ON on December 14th, 1938 to the late and . Joyce is survived by her loving wife, Adam; Jonah; Lisa; ; Rebecca and Stephanie; ; Rebecca Barnes and Stephanie Barnes; ; . A Celebration of Joyce's Life will be held 2:00pm on July 13th at K.W. Montroy Funeral Home. In lieu of flowers, contributions can be made to Trust Fund for Alex Barnes, Diabetes Association, Cancer Society. Condolences may be shared at davisseawinds.com.

Zander Funeral Home
 Published: 2012-12-05 14:37:47 EST

[Like](#) · [Comment](#)

To update an obituary already posted to Facebook, delete the record from your Facebook page and then go to Main > Book Of Memories > Facebook Record Management. Click the Re-Post button to the right of the record.

Records				
Date of Death	Deceased Name	Last Posted Date	Post Status	
2012-12-05	Val Barnes		Ok	Re-Post
2012-11-22	Ronald Jones	2012-12-06 09:24:04	Ok	Re-Post
2012-10-01	Emily Hayworth	2012-12-06 09:25:06	Ok	Re-Post
2012-10-05	Rose Harper		Ok	Re-Post
2012-08-24	Mike Hepburn		Ok	Re-Post
2011-12-29	Rachel Shawley		Ok	Re-Post
2012-08-21	Joyce Barnes	2012-12-06 09:29:06	Ok	Re-Post



Note: The record will say 'Pending' until it auto posts to Facebook (15 minutes). There is no way to change how the information appears / displays in Facebook.

If you have a Twitter account and would like your obits to push to it as well, [download the Twitter app from your Facebook account](#). Anything that is posted to Facebook will then post to Twitter.

[<< Approve Stories](#)

[SimplyOne Account >>](#)

SimplyOne Account

This section provides the details of all revenue generation transactions (candle, flower, cards).

Navigate to Main > SimplyOne Account.

The account details all transactions related to the revenue generating features within the Book of Memories (candles, flowers, cards) and displays the amounts earned by your firm.

Balance Sheet

To view the overall Simply One Account balance sheet, choose specific dates or select one of the preset ranges: Today, Week So Far, Month To Date, or Year To Date. The information displayed covers what has been earned and spent during your dates selected.

Date Selection

Start Date (YYYY-MM-DD):

End Date (YYYY-MM-DD):

Select A Preset Date Range: Month To Date

[Reload Data](#)

[View Transaction Log](#)

Balance

Opening Balance	\$113.24
Change in Available Balance	\$63.74
Subtotal / Closing Balance	\$176.98

Given

Subtotal / Closing Balance	\$75.00
-----------------------------------	----------------

Earned

Opening Balance	\$880.87
Candle	\$63.74
Subtotal / Closing Balance	\$944.61

Spent

Subtotal / Closing Balance	\$842.63
-----------------------------------	-----------------

Transaction Log

Choose a specific date range and click on Reload Data. This will display all candle, flower and card transactions from that specific date range.

Date Selection					
Start Date (YYYY-MM-DD):	<input type="text" value="2014-01-01"/>	End Date (YYYY-MM-DD):	<input type="text"/>		
Select A Preset Date Range:	<input type="text" value="Year To Date"/>	<input type="button" value="Reload Data"/>	<input type="button" value="View Balance Sheet"/>		
Show <input type="text" value="10"/> entries			Search: <input type="text"/>		
Transaction Date	Account Class	Account	Transaction Type	Amount	Log Id
2014-01-02 12:40:10	Earned	Sympathy Card	SympathyCardTransfer	1.00	9338
2014-01-02 12:59:06	Earned	Sympathy Card	SympathyCardTransfer	1.00	9344
2014-01-04 09:27:09	Earned	Candle	CandleTransfer	12.75	930945
2014-01-04 18:22:14	Earned	Candle	CandleTransfer	12.75	934678
2014-01-05 17:41:02	Earned	Candle	CandleTransfer	12.75	943027
2014-01-06 12:07:46	Earned	Candle	CandleTransfer	12.75	949485
2014-01-06 14:26:38	Earned	Sympathy Card	SympathyCardTransfer	1.00	9482
2014-01-06 14:37:13	Earned	Candle	CandleTransfer	6.37	950374
2014-01-07 12:47:13	Earned	Sympathy Card	TransferReversal	-1.00	9344
2014-01-08 13:48:18	Earned	Candle	CandleTransfer	31.87	969823
<input type="button" value="Show All Classes"/>		<input type="button" value="Show All Accounts"/>	<input type="button" value="Show All Types"/>		
Showing 1 to 10 of 27 entries					
<input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="3"/> <input type="button" value="Next"/> <input type="button" value="Last"/>					

Candle Log

Select a specific date range and then 'Reload Data'. The Candle Log displays the purchaser, the name of the deceased, how much was spent, and how much your funeral home earned from each transaction.

Date Selection						
Start Date (YYYY-MM-DD):	<input type="text" value="2014-01-01"/>	End Date (YYYY-MM-DD):	<input type="text"/>			
Select A Preset Date Range:	<input type="text" value="Year To Date"/>	<input type="button" value="Reload Data"/>				
Show <input type="text" value="10"/> entries			Search: <input type="text"/>			
Order Id	Start Date	Deceased	Purchaser	Status	Cost	Earned
930945	2014-01-04 09:27:09			Credit	\$20.00	\$12.75
934678	2014-01-04 18:22:14			Credit	\$20.00	\$12.75
943027	2014-01-05 17:40:27			Paypal	\$20.00	\$12.75
949485	2014-01-06 12:07:21			Paypal	\$20.00	\$12.75
950374	2014-01-06 14:37:13			Credit	\$10.00	\$6.37
969823	2014-01-08 13:48:18			Credit	\$50.00	\$31.87
974029	2014-01-08 21:47:47			Credit	\$50.00	\$31.87
981120	2014-01-09 15:37:30			Credit	\$20.00	\$12.75
983144	2014-01-09 20:04:29			Credit	\$20.00	\$12.75
990535	2014-01-10 15:50:43			Cheque	\$20.00	\$12.75
Showing 1 to 10 of 20 entries						
<input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="Next"/> <input type="button" value="Last"/>						

Flower Log

Select a specific date range and then 'Reload Data'. The Flower Log displays the purchaser, the name of the deceased, how much was spent, and how much your funeral home earned from each transaction.

Date Selection

Start Date (YYYY-MM-DD):
End Date (YYYY-MM-DD):

Select A Preset Date Range:

Show entries
Search:

Order Id	Order Date	Deceased	Purchaser	Order #	Flower Cost	Earned
No Simply One Flower Orders Found for that Date Range.						

Showing 0 to 0 of 0 entries

Card Log

Select a specific date range and then 'Reload Data'. The Card Log displays the purchaser, the name of the deceased, how much was spent, and how much your funeral home earned from each transaction.

Date Selection

Start Date (YYYY-MM-DD):
End Date (YYYY-MM-DD):

Select A Preset Date Range:

Show entries
Search:

Order Id	Order Date	Deceased	Purchaser	Order Details	Earned
9338	2014-01-02 12:37:52			BOM Roses Sympathy	Reversed
9344	2014-01-02 12:57:36			BOM Roses Sympathy	Reversed
9482	2014-01-06 14:22:17			Rose In Sympathy	\$1.00
9738	2014-01-15 10:43:49			BOM Garden Sympathy	\$1.00

Showing 1 to 4 of 4 entries

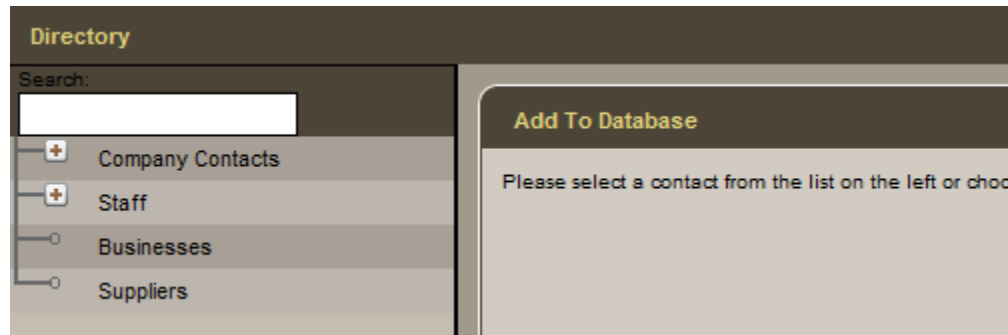
[<< Facebook Integration Setup](#)

[Directory >>](#)

Directory

The Directory section allows you to add / edit information for Company Contacts, Staff, Businesses and Suppliers.

Navigate to your Main tab > Directory.



Select the **Add Contact** button located at the top right.

Enter a name and choose a category.

Enter a 'payable to' name (optional).

Enter the mailing address and contact information.

When complete, click the **Save** button.

To edit a contact, select the **+** icon beside a category, select a contact, and make the changes. Click **Save** when done.

[<< SimplyOne Account](#) /

[System Profile >>](#)

System Profile

Your System Profile is where you enter all the location information for your funeral home,

! The System Profile is very important; it is the core source of information that populates many key areas of the website. It is also crucial to keep the information up-to-date at all times to continue receiving important updates.

Navigate to System Settings > System Profile > Profile.

Complete or modify the following information:

- Company Name
- Copyright Name
- Branch Name (allows the system to distinguish between multiple branches if the company name is the same)
- Business Code Number
- Funeral Home License Number
- Tax Number
- Call Volume (annual)
- Address information.
- Phone Number
- Fax Number (if applicable)
- Contact Person (primary contact)
- Contact Email – this is primary contact's email address, which will also be displayed on your website
- Website Address (URL)
- Email for Website Forms (email address where all forms submitted by online visitors should be sent; separate multiple addresses with comma and space)
- Email for QuickSearch Reports (email address to receive reports of searches done on website by online visitors; separate multiple addresses with comma and space)
- Email for billing information (email address to receive all invoicing; separate multiple addresses with comma and space)
- List the communities you serve (separate multiple communities with comma and space)
- List any additional keywords you would like to use that relate to your firm (ex. pre-arrangement, cremation, family owned, etc.)
- Show birthdays on the web (birth dates of deceased)

- Enable Death Anniversary Notification (email notification on 1st anniversary of the deceased's death anniversary).



Always remember to **SAVE** all changes before exiting the page.

If your funeral firm has more than one location (branch), make sure all are listed. If they are not, create a new profile using the [Add New Site Branch](#) button at the top right. If a location's profile is already open, you will not see this button until you save.

[<< Directory](#)

[General Settings >>](#)

General Settings

This page details how to define how long a record is set as current in your system and how to disable prices on our website with a single click of a button.

Navigate to System Settings > System Profile > General Settings.

General Settings

Funeral Module Settings

Number of days a record is current: 14

Guestbook Monitoring Email: info@funeralhometest.com

Product Catalog Module Settings

Disable all prices on the web ☒

Complete the Funeral Module Settings:

- Number of days a record is current: Select the number of days a record will be considered current on your website; after that number of days has passed, the record will be classified as a past service.
- Guestbook Monitoring Email (email address where all condolence messages will be sent).

Complete the Product Catalog Module Settings:

Disable all prices on the web: Check the box to hide all prices for products on your website.



Always remember to **SAVE** all changes before exiting the page.

[<< System Profile](#)

[Flower Order Settings >>](#)


Flower Order Settings

Heartfelt Sympathies

A Dignified Approach to Expressions of Sympathy

Heartfelt Sympathies offers respectful memorial options for families that demonstrate the love and support of family members and friends when they are needed most. This secure, online portal to personalized products allows visitors to order flowers, memorial cards, and send sympathy baskets.

Navigate to System Settings > System Profile > BOM Flower Order Settings.

Click on . All Heartfelt Sympathies participating florists in your area are listed at the bottom of the page. ([Contact Support](#) if you have a preferred florist that isn't listed.)

The florist configuration tool allows you to designate local florists as 'First Choice Florists' and 'Preferred Florists'.

Florist Configuration - Save

Your First-Choice Florist(s) will be tried first (in random order if there is more than one).
 If your First-Choice Florist(s) is/are unavailable to deliver an order, then your Preferred Florist(s) will be contacted for delivery.
 In the event that none of your chosen florists are able to deliver a particular order, Heartfelt Sympathies will work with other local florists to ensure order fulfillment for your clients.

First Choice Florists

Show 10 entries Search:

Member Code	Member Name	Address	City	State	Zip	Action
No data available in table						

Showing 0 to 0 of 0 entries ◀ Previous Next ▶

Preferred Florists

Show 10 entries Search:

Member Code	Member Name	Address	City	State	Zip	Action
No data available in table						

Showing 0 to 0 of 0 entries ◀ Previous Next ▶

Heartfelt Sympathy Florists in Lindsay, ON

Show 10 entries Search:

Member Code	Member Name	Address	City	State	Zip	FirstChoice	Preferred
75-0599AD	BRANCHING OUT	14 Cameron St W	CANNINGTON	ON	L0E1E0	First Choice	Preferred
75-2626AA	HILL'S FLORIST & GREENHOUSES	182 Lindsay St. S	Lindsay	ON	K9V2N3	First Choice	Preferred
75-5769AA	KAWARTHA LAKES CLASSIC FLOWERS & GIFTS	95 Kent St W	Lindsay	ON	K9V2N3	First Choice	Preferred

Showing 1 to 3 of 3 entries ◀ Previous Next ▶

✿ Florists can be added and removed from the First Choice and Preferred Florist lists at any time. Follow the instructions above to add and once added, the Remove button will become visible. Simply click on it to remove a florist from either section.

Click Save when done.

When an online visitor places an order:

- Heartfelt Sympathies will randomly select a florist (if more than one) from the First Choice list.
- If no First Choice florists are available to process and deliver an order, Heartfelt Sympathies will randomly select a florist from the Preferred list.

- In the event that none of your chosen florists are able to fulfill an order, Heartfelt Sympathies will work with other local florists to ensure the delivery is made.

For more information about Heartfelt Sympathies, contact support@heartfeltsympathies.com.

[<< General Settings](#)

[Frequent Charities >>](#)

Frequent Charities

The Frequent Charities section allows you to build a database of the commonly chosen charities. This will eliminate the need to search for a particular charity every time when creating records.

Navigate to System Settings > System Profile > Frequent Charities.

These are all registered charities and only accept payments by credit card.

Use the Charity bar to find a charity. Use the dropdown for State/Province and City to narrow your search. Click 'Search' when done.



Although a charity may be registered does not mean your local charity is. If your local charity is not found, you will need to add it into your [charities database](#).

Select the 'Add to Frequent' button.

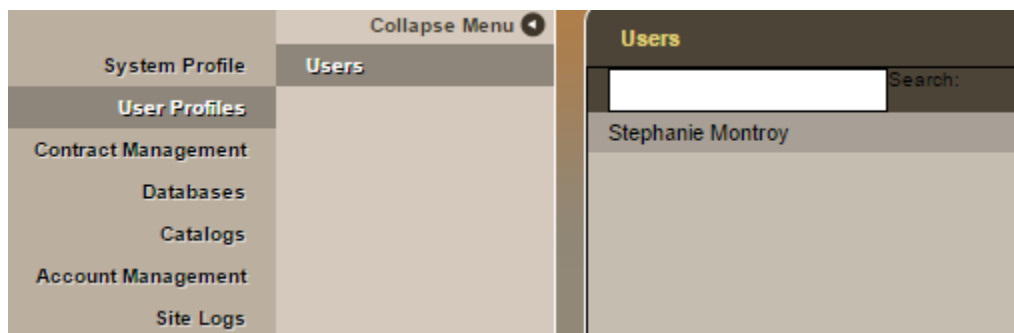
[<< Flower Order Settings](#)

[Add & Edit Users in System >>](#)

Add & Edit Users in System

- * It is highly recommended that each person logging into the system has his or her own individual User Profile. It only takes a few second to create a profile.

Navigate to System Settings > User Profiles > Users.



Select the 'Add User' button at top right and then complete the following mandatory fields:

- Username
- Password
- Security Question – enter a security question. If your login information is ever forgotten, this is how we verify it is you
- Answer – answer to your security question. If your login information is ever forgotten, this is how we verify it is you
- First Name
- Last Name
- Email Address
- User is an administrator (check if user requires access to view / edit other user profiles or system billing)
- Save your changes.

All users created in the system will be visible in the middle of your screen. To edit any of the profiles, click on a name and the edit screen will appear on the right. Save.

[<< Frequent Charities](#)

[Databases >>](#)

Databases

The database section in your FrontRunner system was created to help reduce the amount of time it takes to create records and utilize the many additional features. We recommend that you designate a period of time to build the database; once the information is added, it can be easily accessed from various parts of the system. Enter the information once – and you won't have to enter it again.

Navigate to System Settings > Databases.



The number of databases available depends on your FrontRunner system. All available options are listed below.

Physicians

1. Select the 'Add Physician' button at the top right.
2. Enter the name of a physician. Enter the registration number and contact information if this is pertinent to your record keeping.
3. Select whether the entry is a Medical Examiner or Certifier.
4. Save

Clergy Members

1. Select the 'Add Clergy Member' button at the top right.
2. Enter the name of a clergy member and email address. Add the additional contact information if this is pertinent to your record keeping.
3. Clergy Approves Receiving Anniversary Notifications – check the box if the clergy member approves.
4. Anniversary Notification – once an email address is entered and the box is checked that indicates the clergy member has approved receiving email notifications. The clergy member will receive notice one week prior to the anniversary of death for any record that he/she is associated.



Check the disable notification box if you do not want emails sent to this clergy member.

1. Save

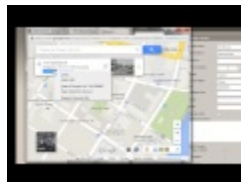
Charities

1. Select the 'Add Charity' button at the top right.
2. Visible (option to hide charity within the Book of Memories)
3. Name of Charity
4. Make Checks Payable To (only if different than name of charity)
5. Charitable Registration Number (located on the charity's website)
6. Select where check should be mailed
7. Complete the mailing address information only if the check will be sent to the charity.
8. Add any additional contact information if this is pertinent to your record keeping: the information will not display within the Book of Memories.
9. Save

Wake Services

1. Select the 'Add Wake Service' button at the top right.
2. Enter the name of a special service that can be held for a family (ex. Knights of Columbus, Holy Name, Rosary, etc...)
3. Save

Locations



1. Select the 'Add Location' button at the top right.
2. Add the street address, city, province/state and postal/zip in order to generate an accurate Google map.
3. Test Map to confirm accuracy. If not accurate, locate the GPS coordinates of the location.
4. GPS Co-ordinates (add only if address doesn't display properly in Google Maps)
5. Check the box if the location is inside city limits.
6. **Specify the type(s) of location. Check all that apply.**
7. Save

 **To find the GPS Coordinates of a specific location:** Right-click the location in Google Maps and select 'What's here?' The coordinates will appear under the search box.

Cities

Most cities are already entered in the system. Only add a city when it is not visible as a selection when creating a record, form, or stationery.

Industries

Add the name of an industry if you require the information to populate the fields for a record, form, or stationery.

[<< Add & Edit Users in System](#)

[Product Database >>](#)

Product Database

Add and edit all of your products and services. If you are a Matthews customer, all products will be pre-loaded into the product catalog for you.

Navigate to System Settings > Catalogs > Products.



If there are no categories on the left, add these before adding products.

Add Categories


Click the 'Add Categories' button. Enter the name (ex. Stainless Steel). Select the classification (ex. Merchandise: Caskets). Save.

Add Products

Select the 'Add Product' button at the top right. Select *click here to add image* to upload a picture. A window will pop-up. Select Browse and locate the image from your computer. Once the image opens, it will load in the window. Double-click on the image to load it to the box.

Enter information about the product and choose whether pricing information will be visible on the website. Choose the category that best suits this product. Save.

Edit Products

Use the  to expand all categories until you find the product to edit. Once selected, the product will appear on the right side of the screen. Save.



Note to Matthews clients: The information in grey, supplied in product specs, can not be edited.

Product Add-Ons

Go to the Product Add-Ons section to add pricing to all corners and cap panels in the catalog. (These are preloaded for Matthews clients.) [Add prices if using the Virtual Showroom](#), which showcases merchandise and pricing.

[<< Databases](#)

[Billing Options >>](#)

Billing Options

You can access all FrontRunner billing information at any time. If you have any questions regarding an invoice or one of the policies, don't hesitate to [contact Accounting](#).

Navigate to System Settings > Account Management.

- current invoices
- billing history
- billing inquiry (form submission)
- redemption history (credits redeemed)
- [payment policy](#)
- [cancellation policy](#)

There are various ways to pay an invoice. The buttons across the top of each invoice detail your options. Each invoice can also be printed for your records.

Simply One Available

The credit amount in your [SimplyOne Account](#) will display. The totals are calculated from the revenue generators within the Book of Memories (candles, flowers, cards).

Pay With Simply One

If there are Simply One credits/funds available, these can be applied toward the invoice. Click the button to redeem. If the total is less than the invoice, once redeemed, the remaining balance will display.

Pay With Credit Card

Once you choose to pay by credit card, you will be taken to a new screen where you can enter the card information.

Hosting Fees

FrontRunner offers quarterly or annual invoices. If you choose to pay by credit card, please [complete our pre-authorization form](#) and email it to accounting@frontrunner360.com or fax to 866-728-0681.

Quarterly Hosting Invoice: This option allows you to pay once every three months by credit card only.

Annual Hosting Invoice: This option allows you to pay by credit card or check/cheque.

If you would like to pay via check/cheque, please mail it to:

FrontRunner Professional, Inc.
6A Clarence Street
Kingston, ON Canada
K7L 5H8



To avoid late payment, please make sure you send the check/cheque at least 10 business days prior to the due date.

[<< Product Database](#)

[FAQs on General Issues >>](#)

FAQs on General Issues

Below are a list of common questions regarding general issues. If you are still unable to find a solution to any problem that you are experiencing, please contact support@frontrunnerpro.com.

Question: My password doesn't work anymore. I logged into the system earlier today but I can no longer access. What happened?

Answer: The usernames and passwords are case sensitive. You need to enter the information the same way it is set up in your system. If the issue persists, try logging in from another computer. This may be a computer error, not a system error.

Question: Can anyone access our system?

Answer: No. Only those people with profiles (that [include usernames and passwords](#)) have the ability to access the system.

Question: What security measures have been taken to prevent someone from accessing our system and changing the content?

Answer: In conjunction with the recorded log, users only have 3 attempts to log into the administration area of your system before being "locked out". If there are more than 3 unsuccessful attempts, our servers track the computer that the person is using and blocks any further attempts. Our improved security features require everyone to type in their username and password every time they log in. This helps prevent strangers from accessing your data.

Question: How long can I be logged into our system? Is there a time limit?

Answer: There is no time limit, however there is a "time out" limit for those who remain logged in but leave their computer. The limit is equal to 3 hours of non-activity time. We recommend logging out of your system whenever you step away from your computer. This will prevent unauthorized people from viewing, modifying or compromising your data.

Question: What happens when I have exceeded the "time out" limit?

Answer: You will know that the "time out" limit has been exceeded and you try clicking on any button or menu item in the system. You will be presented with the initial login screen. We recommend saving your

work and then logging out of the system whenever you step away from your computer. This will ensure no loss of your data and prevent unauthorized people from viewing, modifying or compromising your data.

Question: I am being asked to clear my cache. What does that mean and how do I do that?

Answer: The cache is where your browser files are stored so you don't have to download file every time you need them. When we update files, caches need to be cleaned because the cached data is out of date. Different versions will have different steps. [Try this link](#) – choose your web browser and version to access the appropriate steps for your computer.

Question: How do I take a screen shot?

Answer: To do a screen shot, open the page you need to capture and follow these instructions:

1. Press CTRL+SHIFT+Print Screen on your keyboard. Nothing will “happen” right away – wait as the screen shot is taken and placed on your clipboard.
2. Open Microsoft Paint (usually found under the Start Menu > Accessories)
3. In paint go to the “Edit” menu and select “Paste”
4. In paint go to the “File” menu and select “Save As”
5. Name the file and save it to a folder or your computer's Desktop.

Question: How do I change the time or date in my system?

Answer: The time and date in your FrontRunner system is tied directly to your computer clock, which adjusts to time zone and daylight savings settings. To change the time/date, click on the time/date display on your computer's task bar (usually located close to volume, battery and internet signal icons). The time/date settings can also be accessed and modified through your computer's Control Panel.

Question: Why does FrontRunner choose a minimum screen resolution of 1024×768 and how do I check/change my screen resolution to make sure my computer meets the minimum requirements?

The resolution of 1024 × 768 was chosen after determining the most common resolution as more people opt for larger monitors.

640 × 480pixels – .06% market share

800 × 600pixels – 4.5% market share

1024 × 786pixels – 37% market share

The remaining % are higher resolutions.

To change your monitor's resolution, visit the following [website that provides step by step instructions](#).

[<< Billing Options](#)

[Add / Edit / Remove a Deceased's Record >>](#)

Add / Edit / Remove a Deceased's Record

The information listed below will allow you to create a record, push it to your website, and automatically create a Book of Memories. A Basic Record includes most of the information that is required for the online tribute. (Once the basic record is created, navigate to the [Book of Memories](#) page). Record Management includes all the fields required for creating forms and stationery. Each record comes equipped with its own settings to – among other things – publish, reformat, delete, and push to Facebook.

- ✿ **Standard Records** include First Call fields and information to populate forms and stationery.
Web Only Records appear on the website and don't require a lot of information.
Pre-Need Records allow you to enter all pre-arrangement information.
Book of Memories Records contain the same data but are intended for families your funeral home has not served.

You can change any record type from one to another (if available in your system) at any time through the [Record Settings](#).

- ✿ If you need to edit an existing record, navigate to Main > Records to access all current, past, and pre-need records.

- [Create a Basic Record](#)
- [Create a Management Record](#)
- [Record Settings](#)
- [Post Your Obits to Facebook](#)
- [FAQ – Records](#)

Create a Basic Record

A Basic Record includes most of the information that is required for the online tribute. Once it's created, the information can be accessed on the website and the Book of Memories.



Create a Record

Navigate to Main > Records. Hover over the 'Add a New Record' button at the top right. For a basic record, choose either Web Only (families you have served) or Book of Memories (families you have not served).



Basic Information

- Branch: Select which branch, if more than one company location, is managing the service.
- Publish to Web: Once saved, the information will automatically publish to the website.
- Current/Past: Force to be current if, for example, a person passed away six months ago but the memorial takes place tomorrow. The record appears as a current service on your website. Note: change the status back to 'Automatic' following the service otherwise it will remain current forever.
- Enter the remaining basic information

✿ All date fields contain a calendar icon for quick entry. This tool is not recommended for the Date of Birth.

- Video Link: URL of a third party company's video tributes.
- Webcast Link: URL of a third party company's webcasting.

✿ Once all information is added to a basic record and saved, refer to the [Book of Memories](#) section that include information about adding photos, selecting a theme, adding insignias, etc.

- [Family Login](#)
- [Add a Place of Death](#)
- [Add Clergy](#)
- [Add Charitable Donations](#)
- [Add Service Details](#)
- [Add a Notice](#)

[<< Add / Edit / Remove a Deceased's Record](#)

[Family Login >>](#)

Family Login

More and more families are taking ownership of their loved one's Book of Memories and appreciate the opportunity to connect and engage with family and friends using these online tools.



Family Interactive Edition

The system automatically generates a **Family Username and Family Password**. (Both can be changed to what the funeral home or family prefers.)


Family Interactive Edition

☒ **Family Login Enabled**

Family Username:

Family Password:

Family Interactive and Condolence E-mail List
The e-mails below will receive notification of all condolences and family interactive login information and password updates.

 **Add E-mail**

This allows the family to login to their loved one's Book of Memories to view private condolences and flower cards, change the theme, approve any photos or stories (if the approval process is turned on), upload photos, share stories, and send e-thank-you cards to anyone who signs the guest book.

Family Interactive and Condolence Email List: Add the email addresses of any family members who would like to receive the family login information (and future login changes) and all condolences. If there is more than one address, click 'Add E-mail.' The condolences are sent once a day to email addresses entered. (All condolences are filtered for any inappropriate words.)

What does the family login allow access to do?

Once a family is logged in, there are numerous features that they have access to:

View Private Condolences – Families can view the private condolences left for them through the Book of Memories (posters have the ability to choose whether their condolence is submitted privately or publicly).

View PDF Flower Cards – Families can view details on the floral arrangements ordered through the Book of Memories.

Send E-Thank You Cards – Families can easily send e-thank you cards to anyone who has submitted a condolence, purchased a memorial candle or purchased a floral arrangement through the Book of Memories

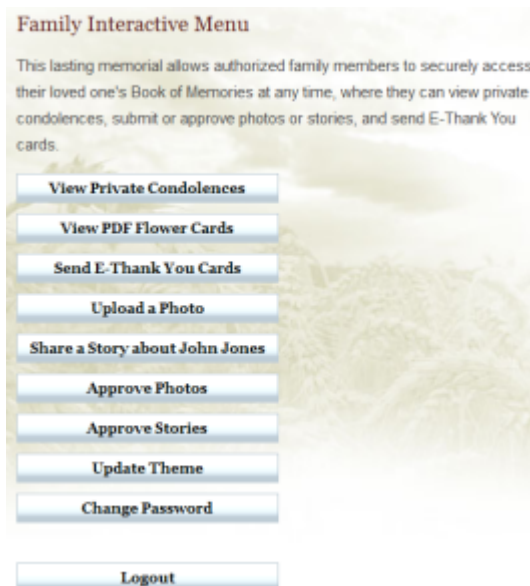
Upload a Photo

Share a Story about their loved one to the Book of Memories

Approve Photos or Stories posted to the Book of Memories If your funeral home is utilizing the Approval System, the family can also log in to approve photos or stories of their loved one.

Update the Book of Memories Theme – Families have the ability to change the look and feel of the memorial website by simply choosing a new theme.

Change Password – Families can update the password to their login family login.



* Condolences, stories or photos cannot be deleted through the family login. Only the funeral home has the ability to delete submissions. Condolences and Stories can be deleted from the [Tributes](#) section of a record. Photos can be deleted from the [Manage Photos](#) section of a record.

[<< Create a Basic Record](#)

[Add a Place of Death >>](#)

Add a Place of Death

Select the Place of Death location from drop-down or 'Add' a new location. A pop-up window will appear. To learn how to add a location, [refer to Databases](#). If the person passed away at home, check the box 'For Current Record Only' when adding the location.

[<< Family Login](#)

[Add Clergy >>](#)

Add Clergy

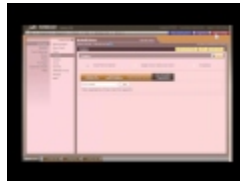
Select a Clergy Member from the drop-down or 'Add' a new clergy member. A pop-up window will appear. To learn how to add a clergy member, [refer to databases](#).

[<< Add a Place of Death](#)

[Add Charitable Donations >>](#)

Add Charitable Donations

The Book of Memories offers online visitors an opportunity to make a charitable donation in the deceased's name. This easy-to-use feature is processed through My Tribute Gift Foundation and an official tax receipt is automatically generated and issued with every donation.



There are three donations options:

*Family Preferred Charities: *

1. **Select from Frequent List:** Once list is built, click the 'Add to Preferred Charities' to select for this record.
2. **Select from Master Database:** These are all registered charities and only accept payments by credit card. Use the search bar to find a charity then select the 'Add to Preferred Charities' button. If the charity is frequently chosen, 'Add to Frequent'. This will eliminate the need to search for a particular charity every time when creating records. Note: Use the dropdown for State/Province and City to narrow your search. Note: Local chapters of particular charities may not be included in the database.
3. **View Charities Selected:** Lists all charities designated as preferred charities for this record.
4. **Non-Charitable Organizations:** All non-registered charities added to your [Charities Database](#). Select and then 'Add'.

No Donations: The charitable donation option within Book of Memories is unavailable.

Display to Donor: Charity of your choice: Donor can choose to donate to any charity in the deceased's name. (Create a frequent list in the system to provide online visitors with a few ideas about local and popular charitable organizations.)

How much would you like to donate?

☒ \$50.00 ☐ \$100.00 ☐ \$250.00 ☐ Other \$

Select a Charity

The family appreciates your willingness to make a donation in remembrance of their loved one. They ask that you choose an organization you feel worthy of the gift by selecting from the popular charities or using the search box below. A record of your generous donation will become a permanent part of their loved one's Book of Memories™.

Choose from Our Popular Charities

Select Charity	- ALZHEIMERS SOCIETY INC
Select Charity	- AMERICAN HEART ASSOCIATION INC
Select Charity	- AMERICAN DIABETES ASSOCIATION INC
Select Charity	- AMERICAN NATIONAL RED CROSS
Select Charity	- AMERICAN CANCER SOCIETY INC
Select Charity	- AMERICAN LUNG ASSOCIATION
Select Charity	- NATIONAL HOSPICE FOUNDATION
Select Charity	- AMERICAN KIDNEY FUND INC
Select Charity	- CHILDRENS MIRACLE NETWORK
Select Charity	- HUMANE SOCIETY OF THE UNITED STATES

Or

Search for a charity

Charity:

Province/State: All Provinces/States ▼

City: All Cities ▼

Search

Selected Charity:

No Charity Selected

Proceed

[<< Add Clergy](#)[Add Service Details >>](#)

Add Service Details

The Service Details section of the Book of Memories automatically generates a Google map so online visitors can verify the location and directions to the visitation, service, interment and reception.

Visitations

Once the number of public visitations is selected, a corresponding number of sections will appear. Select the visitation location or Add a new location. A pop-up window will appear. To learn how to add a location, [please refer to Databases](#). Enter the dates and times. Follow the same steps for any private visitations.

Service

Select the service location or Add a new location. A pop-up window will appear. To learn how to add a location, [refer to Databases](#). Enter the date and time. If the service is private, check the box to Hide Service Date on Web.

Additional Services

To incorporate additional, personalized services in the Book of Memories, click on 'Additional Services' in the left menu. (If that is not an option in the record, [check with your Success Coach](#) to add it.) Once the page is accessed, 'Add New Service' at top right. The following fields are mandatory:

- Service Name
- Service Date
- Location
- Service Time

If the Location is new (has not been entered in the system), add the location name and address information. Add any additional information and Save. This information will be automatically added to the main and service details pages within the Book of Memories. This feature can be used to complement or replace the existing service and visitation fields.

Service Options

Information added here will be accessible if accessing stationery program.

Interment

Select the interment location or Add a new location. A pop-up window will appear. To learn how to add a location, [refer to Databases](#).

Reception

Select the reception location or Add a new location. A pop-up window will appear. To learn how to add a location, [refer to Databases](#).

[<< Add Charitable Donations](#)

[Add a Notice >>](#)

Add a Notice

Enter the Life Story or Obituary. The text can also be pasted from any program such as Microsoft Word. If information is added to both fields, only the obituary will display in the Book of Memories.

[<< Add Service Details](#)

[Create a Management Record >>](#)

Create a Management Record

While the basic records in the FrontRunner system will populate all of the fields for the Book of Memories, the management records cover a lot more details and will allow you to auto-populate forms and stationery. Starting with the First Call, the management record includes numerous sections and fields; once information is added, it can be accessed from various other parts of the system. The FrontRunner one-write technology is intended to make the management of your records that much easier.



Main > Records

Mouse over 'Add a New Record' at the top right and select either:

- **Standard Record** to enter all information required for forms.
- **Pre-Need Record** to enter all information required for pre-arrangement.



✿ It is helpful to separate the at-need and pre-need records into their own categories. The designation can be changed to at-need at any time by accessing the Record Settings.

- [First Call](#)
- [Deceased Info](#)
- [Consultation](#)
- [Family Information](#)
- [Military Information](#)
- [Life Story](#)
- [Services](#)
- [Cemetery](#)
- [Additional Services](#)
- [Donations](#)

- [Create Obituary/Send to Newspapers](#)

[<< Add a Notice](#)

[First Call >>](#)

First Call

Fill in all applicable information. FrontRunner's one-write technology will push content to corresponding locations throughout the system.

Deceased Information

- Branch – If more than one location, select which branch is managing the service.
- Salutation, Given Name, * Middle Name – include all middle names, Last Name, Suffix – if applicable, and Nick Name – This name will appear with surrounding quotations after the middle name(s).
- Gender – The template color will change to either green or pink.
- Marital Status
- Date of Death – Use the calendar icon for quicker entry.

Family Interactive Edition

- The system automatically generates a **Family Username and Family password**. (Both can be changed to what the funeral home or family prefers.) This allows the family to login to their loved one's Book of Memories to view private condolences and flower cards, change the theme, approve any photos or stories (if the approval process is turned on), upload photos, share stories, and send e-thank-you cards to anyone who signs the guest book.
- **Family Interactive and Condolence Email List:** Add the email addresses of any family members who would like to receive the family login information (and future login changes) and all condolences. If there is more than one address, click 'Add E-mail.' The condolences are sent once a day to email addresses entered. (All condolences are filtered for any inappropriate words.)

Place of Death

- Copy Address From – Use the dropdown to pull the same address information from another source.
- Place of Death – If the location is not contained within the dropdown, 'Add.' A pop-up window will appear. To learn how to add a location, [please refer to Databases](#).
- Country, State/Province, City – If the city location is not contained within the dropdown, Add . A pop-up window will appear. To learn how to add a city, [please refer to Databases](#).
- Address, Apt/Unit, Zip/Postal Code
- Locality is
- District/County/Township
- Medical Examiner – If the physician's name is not located within the dropdown, 'Add.' A pop-up window will appear. To learn how to add a physician, [please refer to Databases](#).

- Body Released
- Date Admitted
- Check one of the following: Residence, Nursing Home, Hospital, Hospice or Other.
- Hospice Facility Name – If applicable
- Inside City Limits
- Medical Record Number
- Transferred from other facility

Informant Information

- Copy Address From – Use the dropdown to pull the same address information from another source.
- Salutation, First Name, Middle Name – include all middle names, Last Name, Maiden Name – if applicable, and Suffix – if applicable.
- Email Address
- Phone Number, Cell Phone Number
- Country, State/Province, and City – If you do not see a city in the dropdown, 'Add.' A pop-up window will appear. To learn how to add a city, [please refer to the Databases.](#)
- Address, Unit / Apt, and Zip/Postal Code
- Relationship to the deceased

Next of Kin

- Copy Address From – Use the dropdown to pull the same address information from another source.
- Same as Informant – Check the box if the next of kin is the same as informant. If so, all informant information will automatically populate the fields below.
- Salutation, First Name, Middle Name – include all middle names, Last Name, Suffix – if applicable, and Maiden Name – if applicable.
- Email Address
- Relationship to deceased
- Phone Number and Cell Phone Number
- Country, State/Province, and City – If you do not see a city in the dropdown, 'Add.' A pop-up window will appear. To learn how to add a city, [please refer to the Databases.](#)
- Address, Unit / Apt, and Zip/Postal Code

Executor

- Copy Address From – Use the dropdown to pull the same address information from another source.
- Same as Informant – Check the box if the executor is the same as the informant. If so, all of that info will automatically populate the Executor fields.

- Salutation, First Name, Middle Name – include all middle names, Last Name, Maiden Name, and Suffix.
- Email Address
- Relationship to deceased
- Phone Number and Cell Phone Number
- Country, State/Province, and City – if the city is not contained in the dropdown list, 'Add.' A pop-up window will appear. To learn how to add a city, [please refer to the Databases.](#)
- Address, Unit / Apt, and Zip/Postal Code

Check List

- Date of Call – Use the calendar icon.
- Time of Call
- Authorization to Embalm

Use dropdowns to select how below will be obtained.

- Clothing
- Social Security Number/Social Insurance Number
- Parents Names
- Parents Birth Place
- Photos

Appointment

- Appointment Place
- Appointment Date – Use the calendar icon.
- Appointment Time
- Assigned Director
- Special Notes

[<< Create a Management Record](#)

[Deceased Info >>](#)

Deceased Info

Vital Information

Most of the information in this section will be populated if First Call information was entered. The following are fields not included within the First Call.

- Maiden Name – If applicable.
- Race
- Of Hispanic Origin
- Video Link – Enter the URL of a third party company used for video tributes. (There is no option to upload a video directly into this system.)
- Social Insurance Number/Social Security Number
- Religious Denomination

Residence Information

- Copy Address From – Use the dropdown to pull the same address information from another source.
- Country, State/Province, and City – if the city is not contained in the dropdown list, 'Add.' A pop-up window will appear. To learn how to add a city, [please refer to the Databases.](#)
- Address, Apt/Unit, Zip/Postal Code
- County
- Length of Residence – In years

Birth & Death Information

- Place of Birth (Facility)
- Country of Birth, State/Province of Birth, City of Birth – if the city is not contained in the dropdown list, 'Add.' A pop-up window will appear. To learn how to add a city, [please refer to the Databases.](#)
- Date of Birth, Date of Death, and Time of Death
- Age at Death Years – The age will automatically populate once the date of birth and date of death have been entered.
- Age Less Than a year
- Hospital Code
- Birth Certificate Number and Birth Certificate Issuer
- Death Occurred at Hospital – If applicable, select hospital department

Next of Kin

These fields will be populated if information was entered in the First Call fields.

[<< First Call](#)

[Consultation >>](#)

Consultation

Body Release Status

Select whether the body has been released and is ready to be picked up.

Personal Effects

- Personal Effects – Separate each with a comma.
- Clothing Special Instructions
- Jewellery Being Supplied.
- Jewellery Being Returned
- What and to whom – Enter what jewellery will be returned and to whom.
- Photos Provided
- Photos Returned
- Video Provided

Check List

These fields will be populated if information was entered in the [First Call fields](#).

Donations

There are three donations options:

Family Preferred Charities:

1. **Select from Frequent List:** Once list is built, click the 'Add to Preferred Charities' to select for this record.
2. **Select from Master Database:** These are all registered charities and only accept payments by credit card. Use the search bar to find a charity then select the 'Add to Preferred Charities' button. If the charity is frequently chosen, 'Add to Frequent'. This will eliminate the need to search for a particular charity every time when creating records. Note: Use the dropdown for State/Province and City to narrow your search. Note: Local chapters of particular charities may not be included in the database.
3. **View Charities Selected:** Lists all charities designated as preferred charities for this record.
4. **Non-Charitable Organizations:** All non-registered charities added to your [Charities Database](#). Select and then 'Add'.

How much would you like to donate?

☒ \$50.00
 ☐ \$100.00
 ☐ \$250.00
 ☐ Other \$

Select a Charity

The family appreciates your willingness to make a donation in remembrance of their loved one. They ask that you choose an organization you feel worthy of the gift by selecting from the popular charities or using the search box below. A record of your generous donation will become a permanent part of their loved one's Book of Memories™.

Choose from Our Popular Charities

Select Charity	- ALZHEIMERS SOCIETY INC
Select Charity	- AMERICAN HEART ASSOCIATION INC
Select Charity	- AMERICAN DIABETES ASSOCIATION INC
Select Charity	- AMERICAN NATIONAL RED CROSS
Select Charity	- AMERICAN CANCER SOCIETY INC
Select Charity	- AMERICAN LUNG ASSOCIATION
Select Charity	- NATIONAL HOSPICE FOUNDATION
Select Charity	- AMERICAN KIDNEY FUND INC
Select Charity	- CHILDRENS MIRACLE NETWORK
Select Charity	- HUMANE SOCIETY OF THE UNITED STATES

Or

Search for a charity

Charity:
 Province/State:
 City:

Selected Charity:

No Charity Selected

No Donations: The charitable donation option within Book of Memories is unavailable.

Display to Donor: Charity of your choice: Donor can choose to donate to any charity in the deceased's name. (Create a frequent list in the system to provide online visitors with a few ideas about local and popular charitable organizations.)

Family Interactive Edition

The system automatically generates a **Family Username and Family Password**. (Both can be changed to what the funeral home or family prefers.) This allows the family to login to their loved one's Book of Memories to view private condolences and flower cards, change the theme, approve any photos or stories (if the approval process is turned on), upload photos, share stories, and send e-thank-you cards to anyone who signs the guest book.

Family Interactive and Condolence Email List: Add the email addresses of any family members who would like to receive the family login information (and future login changes) and all condolences. If there is more than one address, click 'Add E-mail.' The condolences are sent once a day to email addresses entered. (All condolences are filtered for any inappropriate words.)

[<< Deceased Info](#)

[Family Information >>](#)

Family Information

Select 'Add Relation' located at the top right.

Fill in all applicable information:

- Relation Type
- Relation to deceased

Choose all that apply:

- Predeceased
- Contact
- Next of Kin
- Informant
- Executor

Enter information for this family member:

- Salutation, First Name, Middle Name, Last Name, Suffix, and Maiden Name – if applicable.
- Country, State/Province, and City – if you do not see a city contained in the drop down list, 'Add.' A pop-up window will appear. To learn how to add a city, please [refer to Databases](#).
- Address 1 & 2, Unit/Apt., and Zip/Postal Code
- Phone Number and Cell Number
- Email Address
- Birth Country, Province, City – if you do not see a city contained in the drop down list, 'Add.' A pop-up window will appear. To learn how to add a city, please [refer to Databases](#).
- Employer
- Date of Birth
- Add Relation Tasks, Occupation and Age
- Save



Once the Relation is added, the Family Information section will include the ability to Edit or Delete.

[<< Consultation](#)

[Military Information >>](#)

Military Information

Military Info

- Deceased in Military
- Branch of Service
- Date Enlisted and Date Discharged – Use calendar icon.
- Honorable Discharge
- Serial Number
- Veteran File Number
- Veteran Alias

Flag Recipient

- Person Receiving Flag
- Country, State/Province, and City – if you do not see a city listed in the drop down, 'Add.' A pop-up window will appear. To learn how to add a city, [refer to Databases](#).
- Address and Zip/Postal Code

Flag Applicant

- Military Remarks
- Country, State/Province, City – if you do not see a city listed in the drop down, 'Add.' A pop-up window will appear. To learn how to add a city, [refer to Databases](#).
- Address and Zip/Postal Code
- Relationship to the deceased

Flag Issue Point

- Name
- Country, State/Province, and City – if you do not see a city listed in the drop down, 'Add.' A pop-up window will appear. To learn how to add a city, [refer to Databases](#).
- Address and Zip/Postal Code
- Relationship to the deceased

[<< Family Information](#)

[Life Story >>](#)

Life Story

Career

- Education Level – highest level.
- Enter the type of work performed by the deceased.
- Select the industry the deceased was employed in. – if you do not see a industry listed in the dropdown, 'Add.' A pop-up window will appear. To learn how to add an industry, [refer to Databases](#).
- Type in any other careers.

Special Interests

List any sports or other interests.

Hobbies

List any hobbies.

Obituary

- Life Story – enter a life story.
- Obituary – copy and paste the obituary from any program used to write it.

If information has been entered into the Life Story and Obituary fields, only the obituary will appear in the Book of Memories.

[<< Military Information](#)

[Services >>](#)

Services

Visitation

- How Many Public Visitations – once selected, a corresponding number of public visitation sections will appear.
- Visitation Location – if a location name is not listed in the dropdown, 'Add.' A pop-up window will appear. To learn how to add a location, [please refer to Databases](#).
- Use the calendar icon to select the visitation date(s).
- Select the visitation times.
- How Many Private Visitations – once selected, a corresponding number of private visitation sections will appear.
- Use the calendar icon to select the visitation date(s).
- Select the visitation times – private visitation times will NOT show up on the deceased's Book of Memories.
- Visitation Extra Information
- Visitation Music Supplied
- Visitation Music

Wake Services

- How Many Wake Services – once selected, a corresponding number of wake service sections will appear.
- Select the wake service – if a wake service is not listed in the dropdown, 'Add.' A pop-up window will appear. To learn how to add a wake service, [refer to the Databases](#).
- Use the calendar icon to select the wake service date(s).
- Select the wake service time(s).

Service

- Service Location – if a location name is not listed in the dropdown, 'Add.' A pop-up window will appear. To learn how to add a location, [please refer to Databases](#).
- Service Time
- Service Date – use the calendar icon to select the date. If this is a private service, check the Hide Service Date box.
- Number of Church Pews Required (Family Members)
- Number of Church Pews Required (Guard)
- Number of Church Pews Required (Pall Bearers)

- Number of Church Pews Required (Other)
- Service Hymn
- Service Scriptures
- Service Extra Info. – add any extra information for the public.

Service Options

- To add a pall bearer (as many as required), type the name and 'Add.' The name will appear on the right. To remove, click on the name to highlight and then 'Remove.'
- To add music (as many as required), type the name and 'Add.' The song name will appear on the right. To remove, click on the name to highlight and then 'Remove.'

Clergy

Select the clergy member(s). If a clergy member is not listed in the dropdown, 'Add.' A pop-up window will appear. To learn how to add a clergy member, [refer to the Databases](#).

Disposition

- Type of Disposition
- Examiner Approved
- Location – if a location name is not listed in the dropdown, 'Add.' A pop-up window will appear. To learn how to add a location, [please refer to Databases](#).
- Disposition Date – Use calendar icon.
- Country, State/Province and City – if a city is not listed in the dropdown, 'Add.' A pop-up window will appear. To learn how to add a location, [please refer to Databases](#).
- Address and Zip/Postal Code
- Body Embalmed – Check the box if the body is being embalmed.
- Embalmer's Name & License

Reception

- Private Reception (will not appear on Book of Memories if private)
- Reception Location – if a location name is not listed in the dropdown, 'Add.' A pop-up window will appear. To learn how to add a location, [please refer to Databases](#).
- Reception Extra Info
- Reception Announcement

[<< Life Story](#)

[Cemetery >>](#)

Cemetery

Interment Location – if a location name is not listed in the drop-down, 'Add '. A pop-up window will appear. To learn how to add a location, [refer to the Databases](#).

Interment Extra Info – if applicable

- Cemetery Location – Gate
- Cemetery Location – Lot
- Cemetery Location – Section
- Cemetery Location – Gravesite

[<< Services](#)

[Additional Services >>](#)

Additional Services

To incorporate additional, personalized services in the Book of Memories, click on 'Additional Services' in the left menu. (If that is not an option in the record, [check with your Success Coach](#) to add it.) Once the page is accessed, 'Add New Service' at top right. The following fields are mandatory:

- Service Name
- Service Date
- Location
- Service Time

If the Location is new (has not been entered in the system), add the location name and address information. Add any additional information and Save. This information will be automatically added to the main and service details pages within the Book of Memories. This feature can be used to complement or replace the existing service and visitation fields.

[<< Cemetery](#)

[Donations >>](#)

Donations

These fields will be populated if information was entered in the Consultation fields.

Donations

☒ Family Preferred Charities
 ☐ Display to Donor: Charity of your choice
 ☐ No Donations

Select From Frequent List

Select From Master Database

View Charities Selected

Charitycancer society

Province / StateAll Provinces/States

City / TownAll Cities

Search

CANADIAN CANCER SOCIETY / SOCIETE CANADIENNE DU CANCER
 (CANADIAN CANCER SOCIETY BRITISH COLUMBIA AND YUKON DIVISION)

Add to Preferred Charities

✓ Added Frequent

CANADIAN CANCER SOCIETY / SOCIETE CANADIENNE DU CANCER
 (CANADIAN CANCER SOCIETY PRINCE EDWARD ISLAND DIVISION)

Add to Preferred Charities

Add to Frequent

CANADIAN CANCER SOCIETY / SOCIETE CANADIENNE DU CANCER
 (CANADIAN CANCER SOCIETY (NOVA SCOTIA DIVISION))

Add to Preferred Charities

Add to Frequent

CANADIAN CANCER SOCIETY / SOCIETE CANADIENNE DU CANCER
 (CANADIAN CANCER SOCIETY MANITOBA DIVISION)

Add to Preferred Charities

Add to Frequent

CANADIAN CANCER SOCIETY / SOCIETE CANADIENNE DU CANCER
 (CANADIAN CANCER SOCIETY SASKATCHEWAN DIVISION)

Add to Preferred Charities

Add to Frequent

<< < 1 2 3 4 5 6 7 8 9 10 > >>

There are three donations options:

Family Preferred Charities:

1. **Select from Frequent List:** Once list is built, click the 'Add to Preferred Charities' to select for this record.
2. **Select from Master Database:** These are all registered charities and only accept payments by credit card. Use the search bar to find a charity then select the 'Add to Preferred Charities' button. If the charity is frequently chosen, 'Add to Frequent'. This will eliminate the need to search for a particular charity every time when creating records. Note: Use the dropdown for State/Province and City to narrow your search. Note: Local chapters of particular charities may not be included in the database.
3. **View Charities Selected:** Lists all charities designated as preferred charities for this record.
4. **Non-Charitable Organizations:** All non-registered charities added to your [Charities Database](#). Select and then 'Add'.

Display to Donor: Charity of your choice:

Donor can choose to donate to any charity in the deceased's name.

No Donations:

The charitable donation option within Book of Memories is unavailable.

[<< Additional Services](#)

[Create Obituary/Send to Newspapers >>](#)

Create Obituary/Send to Newspapers

Once your obituary / notice template is created within the system, it takes minimal effort to produce a finished product once the standard record information is entered. You can then create a notice and submit it to newspapers with only a few clicks of the mouse.

Within your record, click Notices.

Notice Compiler

The obituary will automatically populate with all the vital statistics, service information, and visitation dates entered. The first notice created is called 'Notice 1' in the drop-down.



If you are sitting with the family, use the font drop-down to choose a larger size so it is easier to read.

- Select a template for the obituary.
- Choose a photo. Either add a new photo or choose from the drop-down list that contains each uploaded photo for the record. (Newspapers accept photo resolutions ranging from 150-200 dpi.)
- Include URL box to link to the deceased's Book of Memories.
- Check the Use Notice as Obituary on Web box to have the obituary appear on the website.
- To add more than one notice, 'Create a New Notice.'
- To add a new notice using the same template, Create a Copy.
- To delete a notice, choose an item from the drop-down and Delete Notice.



If your template is missing information: Once the content loads from the record, changes can be made. Often times, information is missing because it wasn't entered in the Family Information section of the record.

Newspaper Insertions

1. Use the Notice drop-down to select which notice to insert in a newspaper.
2. Select the 'Add a new Newspaper for insertion' button.
3. Select a newspaper.
4. Add New Date; user the calendar icon.

5. Enter any additional information.

- To change newspaper insertion dates: 'Remove'.
- To remove a newspaper and all of its information, 'Remove this Newspaper'.

Print the Summary/Approval Form

Use the Notice drop-down to select which notice to copy; this will generate a print preview.

- To print the notice: 'Print Full Notice Review'
- To print off a summary for the family to sign for approval, 'Print Summary / Authorization Form'.

Submit to Newspapers

Use the Notice drop-down to select which notice to submit. Select 'Email Submission' for each applicable newspaper.

The email address will be the main email address listed in your [System Profile](#).

Copyright Notice



It's recommended that a copyright notice is added to every notice to help protect your obituaries as intellectual property. A printable copy will be available.

Adding Newspapers/Setting up Templates

Newspaper Subscriptions

Navigate to System Settings > Notice Compiler > Newspaper Master List.

- Select the country and city to find the available newspapers.
- Select the newspaper name and Subscribe.

Navigate to System Settings > Notice Compiler > Newspaper Subscriptions.



By entering pricing information, the system will generate an estimated cost.

- Add
- Enter the newspaper Name, Address, State/Province, and Country
- Flat Rate (\$) – if applicable
- Number of Lines
- Extra Line Rate (\$) – if applicable
- Picture Rate (\$) – if applicable
- URL Rate (\$) – if applicable
- Footer Rate (\$) – if applicable
- Schedule – Select when the newspaper is published.
- Allows URL? – Select whether this newspaper allows a URL.
- Contact Information – Enter the contact name, email and phone number for up to three contacts for the newspaper.
- Save

Template Builder

Navigate to System Settings > Notice Compiler > Template Builder.

From the Select Template drop-down, choose 'New Template'; type in a name and whether to make the template the default template.



Use the + to select fields. Add a space between each field chosen.

- Deceased Info: First Name – space – Middle Name – space – Last Name
- Type the words 'passed away' in the box – space.
- Death Details: Date of Death – space.
- Type the words 'at the age of' – space.
- Click the Age (at death) field.
- Once your template is fully built, Save Template .

Edit an Existing Template

From the 'Select Template' drop-down, choose the template to edit. Click inside the white text box to edit. Use the + to locate the category field and click on it to add to the white box (where the cursor is located). Save Template.

[<< Donations](#)

[Create a Book of Memories Page >>](#)

Create a Book of Memories Page

The Book of Memories are beautiful and permanent online tributes of loved ones. A wonderful and easy way to preserve cherished memories, a Book of Memories is automatically created once a record is created in the FrontRunner system. Working with the family, funeral firms can further personalize each tribute with a unique theme, photos, and a slideshow. Online visitors can view service information, post and view condolences, share photos and stories, order floral arrangements, light a memorial candle and/or make a charitable donation in the deceased's name.

More and more families are taking ownership of their loved ones' Book of Memories and embracing all of the features as a way to connect with friends and relatives.

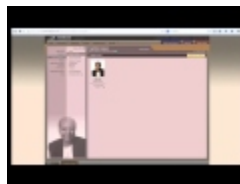
This section will help your firm learn how to personalize each Book of Memories and explain to families how the features work.



Once a record is open, further personalization options can be found in the Book of Memories section in the left menu.



At top right of your screen, click on 'Preview for Web' at any time to view and Save when complete.



- [Select a Theme](#)
- [Add Photos](#)
- [Memorial Program](#)
- [Photographic Memories](#)

- [Service Recording](#)
- [Tributes](#)
- [Insignias](#)
- [Print Condolences](#)
- [Book of Memories Features](#)
- [FAQs on Book Of Memories](#)

[<< Create Obituary/Send to Newspapers](#)

[Select a Theme >>](#)

Select a Theme

You can choose from dozens of themes to apply to a Book of Memories. The themes have been created to capture various interests and hobbies that will allow you to further personalize each online tribute.



Once a category is selected, the corresponding themes within that category will display. Click on any of the themes for a preview.

Additional options for this record:

Book of Memories Settings	
<input type="checkbox"/> Disable funeral home candle	Photo Approval System: Use Global Settings ▼
<input type="checkbox"/> Disable Anniversary Notifications for this record	Story Approval System: Use Global Settings ▼
<input checked="" type="checkbox"/> Include this record on the Veterans Memorial Wall	Set theme as default for: Male Records ▼
<input type="checkbox"/> Include this record on the Fallen Heroes wall	* Note: This will affect NEW records only
	Photo Frame Images: Use Global Settings ▼
	Global Photo Frame Image Setting: Use Global Settings
	* NOTE: Active Photo Only will show the Primary Photo if it exists, or the first photo (if photo approval is on, must be an approved photo), or a placeholder image.

- Disable funeral home candle box if you do not want your funeral home's name to appear on a candle.

- Disable Anniversary Notifications if you do not want the funeral home, clergy, or anyone who signs the guestbook to receive an anniversary notification for this record.
- Include this record on the Veterans Memorial Wall, if app is activated.
- Include this record on the Fallen Heroes Wall, if app is activated.
- Photo Approval System – change setting (On / Off) for this record only if different than the [Global BOM Settings](#).
- Story Approval System – change setting (On / Off) for this record only if different than the [Global BOM Settings](#).
- Set theme as default – allows you to set one theme as the default for all records, all male records, or all female records.
- Photo Frame Images (photo frame in top banner of Book of Memories) – select one of the following:
 1. **All Photos** – Every photo uploaded to a record will be placed in the rotation.
 2. **Primary Photo Only (No Rotation)** – Only the photo selected as the primary photo within a record will display.
 3. **Active Photo Only (No Rotation)** – Will display either the primary photo (if one has been designated), the first photo in [Manage Photos](#), or a placeholder image if no photos are added to a record.
- BOM Menu Date of Birth/Death Date Format – change date format setting for this record only if different than the [Global BOM Settings](#)
- BOM Service Details Page Date of Birth/Death Date Format – change date format setting for this record only if different than the [Global BOM Settings](#)

✿ The Fallen Heroes Wall was created to represent the services of those men and women who have given their lives in the line of duty as a police officer, firefighter, or emergency medical technician. Fallen Heroes also include military personnel, including Coast Guard and Army Reserve, who died in active service. The Veterans Memorial Wall includes the names of those who have had extensive experience in a particular field, especially military service.

Click on 'Preview for Web' to view and Save when complete.

[<< Create a Book of Memories Page](#)

[Add Photos >>](#)

Add Photos

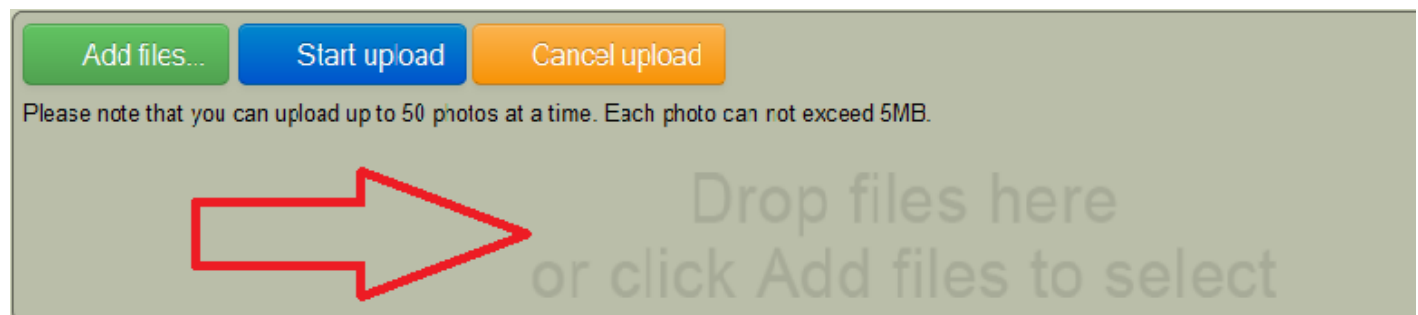
It's recommended that at least one photo is added to the Book of Memories; it will be displayed on your website's home page and in the top banner of the Book of Memories. More photos can be added to each record and can then rotate within the top banner of the Book of Memories (See [Global BOM](#) to adjust settings) and/or be used to create photographic memories (slideshow) and digital video tributes (DVTs).

Here are the key features:

1. Add up to 50 photos at a time
2. Drag and drop functionality means no more zip files
3. Photos can be rotated
4. 5 mb / photo file size limit
5. Upload .jpg, .gif, or .png files

Manage Photos

There are 2 options to add photos to a record.



Add Files

- A pop-up window will appear to locate the photo(s) on your computer.
- Either double click on the file or click once and hit open. (Up to 50 photos at a time can be uploaded.)
- Once all photos have been added, click on Start Upload

Drop Files (Drag & Drop)

- Locate the photo(s) on your computer and click once to highlight.
- Drag and drop the photos to where it says 'Drop files here...'
- Click on Start Upload

- 
- Hold down the shift key while clicking on photos to select multiple photos grouped together in one folder; use the Ctrl key to select multiple photos not grouped together in one folder.

Adjust Your Photos

Below each photo, there are a number of options:

- Click on the arrow buttons to **rotate image** counter-clockwise or clockwise.
- Once the images are loaded in the system, choose '**Set as Primary**' option below one of the photos. That primary photo will appear as background in left menu and depending on your [Global BOM Settings](#), can display as the first / only photo in the upper banner of the Book of Memories.
- **Adjust image focal point** – drag the box or use the corners to adjust the image focal point (center of photo) to ensure that the most important part of the image remains in view when displayed in the Book of Memories. For example, if a person's head is off to the side of the photo, it may not display properly unless adjusted. The focal area size is predetermined based on the Book of Memories theme chosen.
- **Edit Caption** to add a text description of the photo

Delete a Photo

Under each photo will be a link to delete. Click that to remove your photo.

[<< Select a Theme](#)

[Memorial Program >>](#)

Memorial Program

This feature allows you to upload a PDF file of the memorial program for those online visitors, unable to attend the service, to download from the Book of Memories.

- Browse on your computer to locate the PDF file and either double click on the file or click once and hit open.
- Upload memorial program.
- A message box will let you know that the file has uploaded.

[<< Add Photos](#)

[Photographic Memories >>](#)

Photographic Memories

This feature allows you to create a slideshow that will display in the Book of Memories. Each slideshow can include multiple photos and an audio selection.



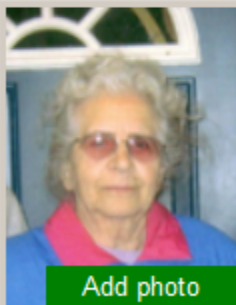
- Select a song from the Audio drop-down. Click on 'Preview Music' to listen to any of the options.
- Click 'Add Frame' to select photos.
- Click on any/all images that you would like to include in the slideshow. Select Done. Click on 'Upload New Photo' to upload additional pictures from your computer.

Add Photos to Photographic Memories

Click on images below to add them to your filmstrip, and then click 'Done' when you are finished.



3246321.JPG
709x887



3246322.JPG
544x696

- All selected photos will appear in the timeline. Hover over photos to access edit icons: delete, move right, move left.
- Save

[<< Memorial Program](#)

[Service Recording >>](#)

Service Recording

This feature allows you to upload an audio recording of the funeral service or eulogy (up to 9 MB / approximately 10-15 minutes). Book of Memories visitors can click on a link to listen to it at any time. This is a nice feature for those who were unable to attend the service.

- Browse to locate the audio file on your computer.
- Upload service recording
- A message will appear when the file has been uploaded.

[<< Photographic Memories](#)

[Tributes >>](#)

Tributes

This section allows easy access to view, edit, and delete:

- Memorial Candles
- Condolences
- Shared Stories
- Donations
- Memorial Trees

Every record contains this section, which allows your firm to make any necessary corrections for online visitors. Click on Edit for any tribute to make changes or Delete.

Condolences	
From:	Bill and Terry [redacted]
Date:	2015-01-29 16:29:38
Message:	Dear David and Mary and Your Families , My Deepest Sympathies To Everyone , David how nice it was to catch up with you on Tuesday , I would often as I said see your Mom when I was out and about. I have such wonderful memories of our days on the Boundry such great neighbors we had around us , And sad to see another one has passed away , But not sad to see that your Mom is at peace and that she does not have to suffer anymore and she can be forever in the arm,s of God. Take Care ...Terry [redacted]
From Email:	bcreech@[redacted]
Private Condolence:	Yes
<div>EditDelete</div>	

[<< Service Recording](#)

[Insignias >>](#)

Insignias

Affiliations can be applied to each record. The logos/emoles/images for church groups, service organizations, wars, nationalities, etc. are available. This feature is greatly appreciated by families that would like to highlight their loved ones' interests, passions, and favorite organizations.

The screenshot shows a web interface for managing affiliations. At the top, there's a section titled "Affiliations" with a sub-header "Affiliations Category". Below this, there's a dropdown menu labeled "Organization / Club / Symbol" and another dropdown menu labeled "Affiliations List" which currently shows "Rotary Club". Below these are two buttons: "Add Insignia" and "Remove Highlighted". In the center, there is a small image of the Rotary Club logo. Below this is a section titled "Affiliation Search". It contains a "Search for:" label, a text input field, a "Search" button, a large empty list box, and an "Add Insignia" button.

Either:

- Choose a category from the dropdown and all affiliations within that category will become visible in Affiliations List.
- Add Insignia
- Remove an insignia by clicking on the graphic to highlight and select 'Remove Highlighted'
- Save

Or:

- Type the affiliation name into the Affiliation Search field to access specific organizations within the list.
- Once located, click Add Insignia to display.
- Save

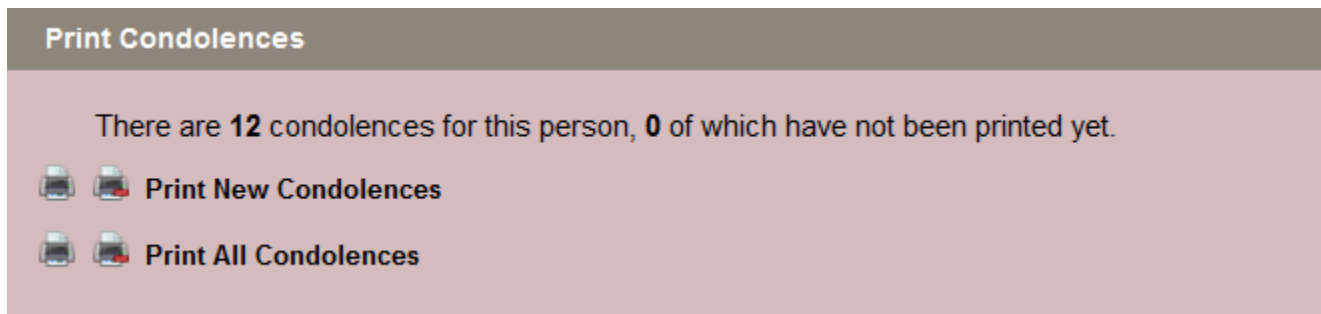
[<< Tributes](#)

[Print Condolences >>](#)

Print Condolences

This feature allows you to print NEW (all those that have not previously been printed) or ALL condolences for the family.

The page(s) can be printed with (printer icon without X) or without (printer icon with X) a watermark background. Once selected, the system creates a PDF file that can also be saved on your computer or emailed to the family.



[<< Insignias](#)

[Book of Memories Features >>](#)

Book of Memories Features

The information below will allow you to better understand how all the features within the Book of Memories work. If a family member or someone in the community calls / writes asking for more information, this page details best practices and how to access particular features.

Service Details

The Service Details page displays the location, date and time of the service and visitation(s).

Online visitors can access a map for each location listed; a detailed Google map will open in a new browser window where visitors can enter their start address to generate driving directions. Google pulls information entered in the locations database to generate these maps so it is important to enter the complete address information. If all information is entered correctly but the map is still not displaying the correct location, right click and move the marker and then enter the GPS settings. To find the GPS settings, enable in Google Maps (click on Maps Labs link – then LatLng Marker), save changes, right click on marker, and select Drop LatLng Marker.

Obituary/Notice

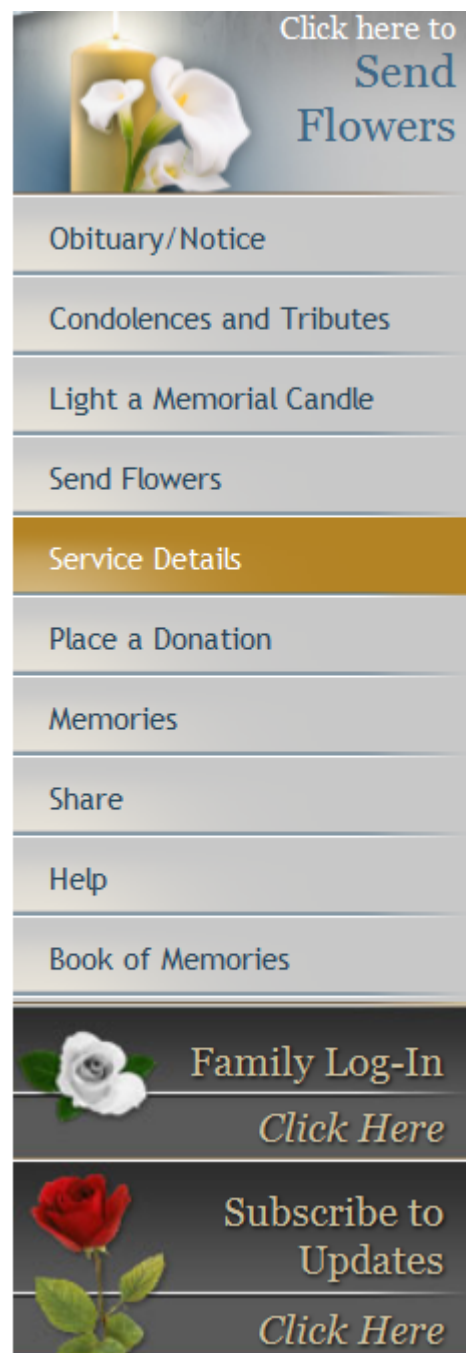
The obituary will display along with the primary photo selected.

Video Tribute

This section will appear if you are using the FrontRunner / Tukios DVD program or if a third-party URL is added to open a video (ex: YouTube).

Webcasting

This section will only appear if this app is activated in your system. Online visitors can click 'Watch Webcast' to view.



Condolences & Tributes

This section will show all condolence messages, candle messages, flower orders and donations. Once any of these messages have been entered in the Book of Memories, they can be viewed or modified by the funeral home administrators within the system's administration. Once changes are made, the message(s) will be immediately updated in the Book of Memories.

How to Send an Online Condolence

- Online visitors must enter their name and email address with the condolence message.
- There is an option to make the condolence message private. These messages will not be shown in the Book of Memories but families can access all messages, including private ones, through the Family Login feature or via email (within the [Family Interactive Edition](#)).
- Post Condolence
- Online visitor have the option to provide feedback about the Book of Memories.
- Online visitors can access the Condolences page where they have the option to make the condolence private (if originally set to be public), and modify or remove it completely.
- Anyone who leaves a condolence message has the option to be sent an email one week prior to the first anniversary of death.

Light a Memorial Candle

- Online visitors can choose to Light a Memorial Candle for 1 month, 1 year, or permanently.
- There are three payment options: check/cheque, PayPal, or credit card. (the 1 month option is not available if payment will be made by check/cheque)
- Add the name how it should be displayed on the candle.
- Enter a message up to 500 characters.

The next step will depend on the method of payment:

Check/Cheque:

Enter personal contact information and captcha information. Submit. Send check/cheque to the mailing address provided. If a payment has not been received within 14 days, the candle will be removed.

PayPal:

Select the country and state/province and enter captcha information. Check out with PayPal. Verify that all the information is correct – Complete Submission.

Credit Card:

Enter personal contact information and captcha information. Submit. Verify that all the information is correct – Proceed to Payment. Enter cardholder information (matches credit card statement) – Continue. A message will appear that states whether the transaction was approved or not. If the transaction is approved, the candle will then be displayed. If the transaction is declined, please visit www.memorialcandlesupport.com to find a solution.



Once a candle message has been placed within the Book of Memories, it can be viewed or modified by the funeral home through the system administration. Once changes are made, the message will be immediately updated in the Book of Memories.

Anyone who lights a Memorial Candle has the option to be sent an email one week prior to the death anniversary as a reminder that it has been one year since the passing of the deceased.

Send Flowers

The information that appears is based on what the funeral home has set for its BOM Flower Order Settings.

Plant a Memorial Tree

Planting a memorial tree is a thoughtful, unique way for your visitors to remember their loved ones who have passed away. The tree will be planted in the area of greatest need according to a planting schedule of the American Forests Organization/Canadian Institute of Forestry. The purchaser can choose to have a memorial card sent to their home, or a person of their choosing, and their name and message will be listed in the Book of Memories and on the Honoring a Life [website](#).

1. Enter the name of the person purchasing the tree
2. You can leave a message for the family, which will be made public. This step is optional. Click 'Continue to Checkout'.
3. Verify Item(s): Verify your item, and click Next.
4. Billing/Shipping: Fill out your billing and shipping information. Click Next.
5. Confirm Order: Confirm that your order and the details you entered are correct. Click Checkout, and you will be directed to pay via PayPal.
6. Payment: Enter credit card details, billing information and contact information. Click Pay Now.

Editing a Memorial Tree Message

If someone has purchased the planting of a Memorial Tree and they contact you to edit the message that they have left with the tree, you are able to do this for them:

1. Login to your system and go to the record that the memorial tree message was left for.
2. Click on Tributes in the left menu, and then Edit Memorial Tree on the right, for the message you need to edit. This will take you to your Honoring a Life dashboard.
3. Click the green Edit button, and edit the message.
4. Click Save.

Saving the changes will automatically publish the updated message to your website, as well as the [Honoring a Life website](#).



This does not edit the card. Please [contact Honoring a Life](#) to update the card.



If you have any questions about the program, please [contact Honoring a Life](#).

Send a Sympathy Card

Sympathy Cards within the Book of Memories are an interactive way for visitors to choose a card, personalize it, and then have it sent directly to the funeral home or the family for only \$5. All processing and shipping is handled by our partner Blue Bird.

- Once a theme for the card is chosen, additional options include: Date to Send Card, Add a Return Address, Add a Signature to the inside of card, Add a note to the inside of card.
- Fill out Recipient Information.
- Choose the quantity of cards required and Add to Cart.
- Continue Shopping, Clear Cart, Edit Billing Info or Checkout. After all billing information has been entered and the payment is made through a secure site, the information is sent to Blue Bird to prepare and distribute.

For inquiries regarding order status or delivery, [click here](#).

Place a Donation

Even though the donation process is straight-forward, these directions will help prepare administrators to handle any phone calls from donors-in-distress. Here's the simple 12-step process:

1. Enter the amount you would like to donate.
2. Choose the Family Preferred charity (if one has been noted) by clicking 'Select Charity.' If the family has not stated a preference, find a charity by using the search field.
3. Once the charity is chosen, the charity's information will display.
4. If the selected charity is correct, select the Proceed button.
5. Complete all fields under Donor Information.
6. Complete all fields under Payment Information.
7. Type in your name (individual, group, organization, company) and select the type of message from the Choose a Message drop down. Type in a message or paste a pre-written message into the Message field.
8. Select whether or not you would like to receive more information about the charitable organization.
9. Enter any additional notes to send to the charity.
10. When complete, select the Proceed button.
11. Verify that all the information is correct. Select Proceed.
12. The online notification will indicate that the transaction has been completed. A receipt will be sent via email.

How much would you like to donate?

☐ \$25.00 ☒ \$50.00 ☐ \$100.00 ☐ Other \$

Select a Charity

Choose from Family Preferred

★ Kris Foundation - **Select Charity**

Or Search for a charity

CANADIAN CANCER SOCIETY ONTARIO DIVISION

Selected Charity:

✓ CANADIAN CANCER SOCIETY ONTARIO DIVISION

Proceed



As part of the email notification system, your funeral home will be notified when a donation is made.

Memories

This section will display all stories and photos shared by family and friends. The slideshow is created by the funeral home and continues to build with photos uploaded by online visitors.

Email a Friend

The Email a Friend option enables a visitor to send a friend or family member a link to the deceased's Book of Memories.

- Enter name and email address.
- Enter friend's name and email address.
- Choose an Email Template by selecting one of the two available messages.
- Email Your Friend.

Share on Facebook

- Use the arrow buttons to Choose the Thumbnail image to be visible on the news feed. Check the box "No Thumbnail" if you would prefer that no image is displayed.
- Where it says Write something, enter a display title.
- From the Share dropdown, choose to share the link on your own timeline, on a friend's timeline, in a group, on a page you manage, or in a private message.
- Select the Share Link button to share the direct link to the deceased's Book of Memories.

Subscribe to RSS Feed

The RSS Feed section allows online visitors to subscribe to a Book of Memories to keep them updated on any changes.

- Use the drop down to select which program will run the RSS Feed. If your program is not within the list, select 'Choose Application' and locate the program on your computer.
- The links shown on the right are previous RSS Feeds. Select any one to open or 'Subscribe Now.'
- There are two options: Home Page is used if your web browser sets up this program as your home page and Google Reader is recommended if you do not have a home page as described above.
- Login to the program.
- The navigation on the left side will contain any subscriptions such as the RSS Feed (shown at bottom of image).

Share on Twitter

The Share on Twitter section allows online visitors to share a link to a Book of Memories with Twitter followers. Login to Twitter and the system will generate a tweet that contains the link. Your own message can be entered after the link. Click Tweet and then view.

Subscribe Via Email

This feature allows Book of Memories visitors to sign up for email notifications for any updates including new condolences, new stories, etc. The email notifications are sent once a day.

- Enter your email address and 'Subscribe to Updates.'

Upload a Photo

- Select Add Files.
- Locate the image(s) on your computer. Select up to 10 pictures (5 MB per picture) at a time. Click the first picture, hold the Control key down on your keyboard, then select the other pictures. If you only need one, either double-click the photo or click on it once and select the Open button.
- Enter a description for the photo(s).
- Start Upload.

! The funeral home has the option to either turn on or turn off the approval process. If the approval process is not activated, all photos will immediately load into the Book of Memories. If the approval process is on, the photo must be approved by the funeral home or family (from within the Family Login) before becoming visible to the public.

Upload a Story

Selecting a photo for the story is optional and you can choose from the available photos listed or upload your own in the 'Upload a Photo' section of the Book of Memories.

- Enter a name and email address.
- Select from the photos displayed.
- Enter the story title.
- Your Story – Write the story in the space provided or if it is located in another program, copy and paste into this section. Notice the Bold and Italics options for text. Also, if you paste the story in this field, click on the eraser in the menu to remove unwanted formatting from another program.
- Preview to review the story.
- Submit This Story or edit the information.
- Once the story is submitted, the online visitor will receive a thank you message.
- Close Window

! The funeral home has the option to either turn on or turn off the approval process. If the approval process is not activated, all stories will immediately load into the Book of Memories. If the approval process is on, the story must be approved by the funeral home or family (from within the Family Login) before becoming visible to the public.

Family Interactive Login

When a family uses their login capabilities, they will be able to:

- View and print all public and private condolences.
- View flower cards from all flower orders.
- Upload photos and stories.
- Approve photos and stories that have been shared by online visitors.
- Send e-thank you cards.
- Change the Book of Memories theme.
- Change the password for the family login.

Sending E-Thank You Cards

The E-Thank You Card system allows families to design and send an electronic thank you card to anyone who has included an email address with their condolence, candle, or donation.

- Next
- Select a card design by clicking on the image.
- Use the drop-down to add a preset message. Once the message is chosen, it can be edited.
- Enter the family's name and email address for replies.
- There will be a preview at the bottom. Review and make any corrections, if needed.
- Next
- Select all recipients of the e-card or Select All to include everyone.
- Next
- Review. Next
- Once sent, there will be a message stating that the e-card has been marked for delivery and should be received within 24-48 hours.

[<< Print Condolences](#)

[FAQs on Book Of Memories >>](#)

FAQs on Book Of Memories

Below are a list of common questions regarding the Book of Memories. If you are still unable to find a solution to any problem that you are experiencing, please contact support@frontrunnerpro.com.

Question: How do I delete/modify a condolence message, candle message, story, or donation written in the Book of Memories?

Answer: To hide, modify or delete a specific tribute saved within a particular record:

1. Open the record in question.
2. Navigate to Book of Memories > Tributes or Tributes > Modify Tributes.
3. Scroll to the tribute you need to delete/modify.
4. Select the 'Edit' or "Delete" button.
5. If editing, Save your changes.

Question: I am receiving condolences through my email but they are not appearing on the website. Why?

Answer: Visitors are able to specify whether a condolence is private or public. All condolences are emailed to family members but if the condolence is private, it will not be visible on the Book of Memories.

Question: Why am I not receiving condolence emails any more?

Answer: verify your email address in your settings.

1. Navigate to System Settings > System Profile > General Settings.
2. You will see a field called "Guest book monitoring e-mail". This is the funeral home email where all the condolences will be sent.
3. Make sure the email address is current and correct.
4. Click "Save Settings" at top right.

If the email address listed is correct, check your spam/junk mail folders.

Question: Why aren't the maps generated by Google Maps working for us?

Answer: If Google is not generating a correct map, check your locations database to ensure that all address information fields are filled out and correct. Google requires all information to generate the proper map.

1. Navigate to System Settings > Databases > Locations.
2. Click on the location name.
3. Verify all the information is correct.

If the information is correct, you can set up GPS Coordinates to help. To find the GPS Coordinates of a specific location: Right-click the location in Google Maps and select 'What's here?' The coordinates will appear under the search box.

Question: How can I set up a Book of Memories for a family even though the service was not with our funeral home?

Answer: A Book of Memories works the same way as a Web-only Record.

1. Navigate to your Main > Records.
2. Mouse over the 'Add a New Record' button at top right.
3. Select the 'Book of Memories' option.

To learn how to add this type of record, refer to the [Create a Book of Memories Page](#) section.

Question: Why aren't the photos and stories shared by families appearing in the Book of Memories?

Answer: The approval process for photos and stories is currently on in your system. These need to be approved by either the family, from within the Family Login, or the funeral home, from within the [Approve Photos](#) or [Approve Stories](#) section, before they become visible in the Book of Memories.

Question: How does a family member remove a photo that has already been approved and is visible in the Book of Memories?

Answer: The family is not able to remove a previously approved photo. The funeral home can do this by opening the record and navigating to Book of Memories > Manage Photos. Click on the 'Delete' link located under the photo that needs to be removed.

Question: Why is there no picture appearing for a record listed on the Current Services page?

Answer: Each record needs one photo designated as the primary picture.

1. Open the record and navigate to Book of Memories > Manage Photos.
2. Select 'Set as Primary' under one photo.

The picture will then load at the left and appear on the Current Services page.

Question: How do I completely remove the candles from the Book of Memories?

Answer: There is no way to completely remove the candle images from the Book of Memories. Please feel free to visit our [Memorial Candles](#) section for more information.

Question: Can we remove the verification code in the Book of Memories? It can be hard to read.

Answer: It can be removed however, we highly recommend choosing a different captcha (verification box) instead to prevent spam emails from posting in the Book of Memories.

1. Navigate to your Main > Book of Memories > Global BOM Settings > Captcha Preference for BOM Pages.
2. There are four options:
 - Do not display Captchas (removes the verification box)
 - Google Re-captcha (standard Google verification)
 - Simple Math (ex. what is 12+11)
 - Candle Count (ex. enter the number of lit candles at the top of the page)
 - When complete, click Save Settings.

Question: I do not want the Book of Memories home page displayed when a deceased's name is clicked on. How can we set up the link to go immediately to the Book of Memories?

Answer Yes, you can turn off the home page.

1. Navigate to your Main > Book of Memories > Global BOM Settings.
2. Remove check from the 'Disable BOM Tunnel Page' box.
3. Click Save Settings at top right.

Question: How can I help a family that keeps receiving an error message when trying to post a story/condolence to the Book of Memories.

Answer: Error messages can be caused by our security filters blocking the posting. The system's filter checks all messages for inappropriate words. If one is found, the message won't be posted. The filters are overly sensitive but it's better to be safe than sorry. If the filter blocks a submission, funeral homes can post a message for the family. In the Book of Memories, start the condolence or story submission process. Enter all the information such as name and email address of person submitting then enter one letter in the message field. Submit.

1. Go to the record > Book of Memories > Tributes.
2. Locate the message and select Edit.
3. Copy and paste the rest of the message into the field and Save.

The message will then be visible on the Book of Memories.

Question: What happens when people make a donation through the Book of Memories? When do the charities receive their money?

Answer: My Tribute Gift handles all credit card donations for all registered charities in North America through the Book of Memories. The "umbrella" charity organization processes the payments every three weeks and sends the accumulated funds to the charity with all the details pertaining to each donation. Those charities registered on ACH (direct deposit) will receive the funds faster than those that are mailed checks. The My Tribute Gift website offers ACH registration and a secure login for the charity to directly access their donation data at any time. The charity can find current info on all the donations, check on funds waiting to be processed from the site, and have funds deposited directly to account with as few delays as possible. Charities can find out more information at the My Tribute Gift website. If you have concerns about any donations, contact My Tribute Gift. Contact information is below.

1-855-355-8141

info@mytributegift.org

3495 14th Avenue, Markham, ON, L3R 0H4

www.mytributegift.org

Question: Is there a way to upload a large number of photos to a record all at once?

Answer: Yes.

1. Go to the folder on your computer that contains the photos you want to upload.
2. Highlight all of the photos that you want to add to the record and then right click.
3. In the pop-up window, go to "Send to" and select "Compressed (zipped) folder".
4. Give the folder a name you'll remember.
5. Go to Manage Photos within the record and select "Upload New Photo".

6. Click “Add” and select the compressed folder.
7. Finish the upload process and all photos contained in that zipped file will be added to the record.

Question: How do I help a person who says their credit card is good but the transaction is declined when trying to light a candle?

Answer: Transactions are either accepted or declined by the credit card company. If what the card holder entered doesn't match exactly what the credit card company has on file for that card, the transaction will be declined for the card holder's protection. In situations like this, it's best to suggest that the person contact their credit card company to verify that their information is correct.

Question: Why are some people who are trying to pay for a candle directed to a web page asking them to enter a lot of personal information?

Answer: FrontRunner is not asking for or storing any personal information. This is a security feature set up by credit card companies. Visa has Verify by Visa. Master Card has Secure Code. There are various other security features created by credit card companies. Should a person contact you about this, suggest that they contact their credit card company or to visit their website for more information.

Question: How do I add a local charity as the Family Preferred charity?

Answer: If you have searched the Master Database for a charity and can't find it, you will need to add it to your database. This often happens when you need to add a new trust fund for a family or if there is a small community organization that is not a registered charity.

Go to System Settings > Databases > Charities. All charities ever added will be visible. To add another one, click on “Add a Charity” in the upper right corner. Be sure to enter all necessary information including the fulfillment method. Once the charity is added, return to the record and click the drop down for Non-Charitable Organizations. Locate the charity and Add it to the Family Preferred list. Save.

Question: How do I correct a mistake in a message or delete a message entirely from the Book of Memories?

Answer: Open the record. Any message submitted to a Book of Memories (Candle, Condolence, Donation, or Story) can be edited in the record.

- If it's a Standard record, select Book of Memories > Tributes. Locate the message that needs to be corrected (Edit) or removed (Delete). Save.
- In Web Only records, go directly to Tributes. Follow the same instructions as above.

Record Settings



Records can be edited or deleted at any time.

The Edit Record Settings buttons is visible once a record is open in **Web Details**. There are multiple options:

Edit Record Settings

Post to

Edit Record Settings

Post to Facebook:

No

Publish to web:

Yes

MyASD Locations :

No

Current / Past :

Automatic (based on date of service / v

File Number:

KMFH-2015-02-04-1

Deceased in Military:

No

Person Making Call:

Informant

Branch:

Zander Funeral Home

Note: Branch selection has been added to the Basic Deceased Information Area.

Delete Record

Save

Cancel

Facebook:

If your firm has a Facebook account and the [set up is complete](#), the app can be integrated within the Pulse system to ensure that when a Book of Memories goes live, the link to it will post to your Facebook page. If you do not app this app and would like more information, please [contact your Success Coach](#): success@frontrunner360.com.

Publish to Web:

When the record is ready to publish to the Book of Memories, set to Yes.

Current/Past:

Force a record to be current if, for example, a person passed away six months ago but the memorial takes place tomorrow. The record can be forced to be current and will appear as a current service on the website.

Note: The status needs to be changed back following the service otherwise it will remain as current forever.

File Number:

The number is automatically generated: initials of the funeral home, the date the record is created, and the record number for that day. This number can be replaced with your funeral home's own filing numbers.

Deceased in Military

Person Making Call

Branch

Mode – Web Only or Standard

Service For – Adult, Infant, Still Born, or Other.

Status

Type of Disposition

Service Type



Delete Record – option is visible on Edit Records Settings pop-up.

[<< FAQs on Book Of Memories](#)

[Add Record to Fallen Heroes Wall >>](#)

Add Record to Fallen Heroes Wall

The Fallen Heroes Wall was created to represent the services of those men and women who have given their lives in the line of duty as a police officer, firefighter, or emergency medical technician. Fallen Heroes can also include military personnel, including Coast Guard and Army Reserve, who died in active service.

✿ To activate this feature in the system, [contact your FrontRunner Success Coach](#).

To add the deceased's name to the Fallen Heroes Wall, open the Record > Book of Memories > Theme.

Check the box beside 'Include this record on the Fallen Heroes Wall' in the Book of Memories settings section.

✿ This field will not be available to check in separate management company systems. It can only be accessed through the record in FrontRunner.

Book of Memories Settings	
<input type="checkbox"/> Disable funeral home candle	Photo Approval System Use Global Settings ▼
<input type="checkbox"/> Include this record on the Veterans Memorial Wall	Story Approval System Use Global Settings ▼
<input checked="" type="checkbox"/> Include this record on the Fallen Heroes wall	Set theme as default for: Select record type ▼
<small>* Note: This will affect NEW records only</small>	

Select the 'Save' button.

[<< Record Settings](#)

[Add Record to Veterans Memorial Wall >>](#)

Add Record to Veterans Memorial Wall

The Veterans Memorial Wall allows you to add the names/records of those who have had extensive experience in a particular field, especially military service, to a wall/page on your website.

✿ If you would like to activate this feature in the system, [contact your FrontRunner Success Coach](#).

To add the deceased's name to the Veteran Memorial Wall, open the Record > Book of Memories > Theme.

Check the box beside 'Include this record on the Veterans Memorial Wall' in the Book of Memories settings section.

✿ This field will not be available to check in separate management company systems. It can only be accessed through the record in FrontRunner.

Book of Memories Settings	
<input type="checkbox"/> Disable funeral home candle	Photo Approval System Use Global Settings ▼
<input checked="" type="checkbox"/> Include this record on the Veterans Memorial Wall	Story Approval System Use Global Settings ▼
<input type="checkbox"/> Include this record on the Fallen Heroes wall	Use Free Candles for this record <input checked="" type="checkbox"/>
	Set theme as default for: Male Records ▼
<small>* Note: This will affect NEW records only</small>	

Select the 'Save' button.

[<< Add Record to Fallen Heroes Wall](#)

[Post Your Obits to Facebook >>](#)

Post Your Obits to Facebook

Facebook is a great tool for individuals, businesses, organizations, and brands to share their stories and connect with people, including potential clients.

Facebook Pages, like timelines, can be customized by adding apps, posting stories, hosting events, and more. Engage and grow your audience by posting regularly. People who like your Page and their friends will see updates in their News Feeds.

You can [create a Facebook page](#) through your personal account.



Note: Only the official representative of an organization, business, celebrity or band is permitted to create a Facebook Page.



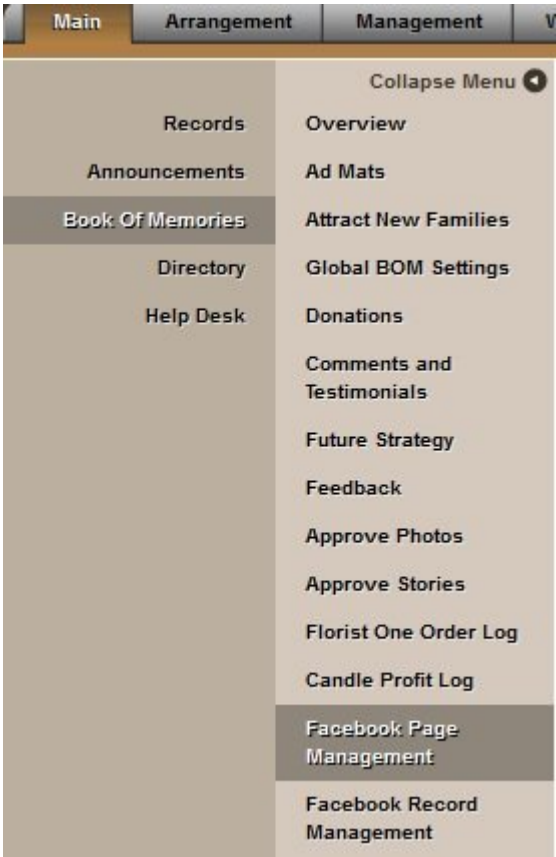
If you would like to activate in your system, [contact your FrontRunner Success Coach](#).

Facebook Integration

Funeral homes can easily post online obituaries to their Facebook page through the Book of Memories with minimal set-up required. This will allow anyone who has liked your Facebook page to view the Book of Memories summary, read the obituary, and link to the funeral home website. This is particularly helpful in communities where local newspapers don't publish every day.


Main > Book Of Memories > Facebook Page Management.

Follow the instructions and select the Click Here to Begin button. This will open your Facebook page. Click the Go To App button.




* Note: Make sure your name is listed under the About This App section. The funeral home page will be chosen in the next step.

Learn more about how apps work now.



Obituaries
Obituaries


[Go to App](#) [Cancel](#)

 1 friend and 4 other people use this app

ABOUT THIS APP

You are logging into Obituaries as [Shelby Young](#).

Who can see posts this app makes for you on your Facebook timeline: [?]

 Friends ▼

THIS APP WILL RECEIVE:


- Your basic info [?]

By proceeding, you will be taken to facebook.frntrunnerpro.com · [Report App](#)

Only the funeral home or business page where obituaries will post are displayed in the 'Manage Your Pages' section. Click the 'X' to the right of any additional pages to remove them.


Leave the Post on your behalf section as is.


Obituaries would also like permission to:




Manage your pages
Obituaries may login as any of your 1 Pages, including:

- CDE Funeral Home





Post on your behalf
This app may post on your behalf, including status updates, photos and more.



[Allow](#) [Skip](#)

Click Allow. A new page will ask for verification of which page(s) will post obituaries. Select your funeral home page and click Save. Click OK to return to the FrontRunner system.

Post Obituaries on Facebook

Open a record and click on Edit Record Settings. Select Yes – Post to Facebook and then Save.

Edit Record Settings

System Switch

Post to Facebook: Yes ▼

Publish to web: Yes ▼

Current / Past : Automatic (based on date of service / vi: ▼

File Number: TS2-2012-12-07-2

Deceased in Military: No ▼

Person Making Call: Informant ▼

Branch: Montroy Funeral Home ▼

Note: Branch selection has been added to the Basic Deceased Information Area.

Delete Record Save Cancel

Facebook searches for new records every 15 minutes; your record will auto post at that time.

[Highlights ▾](#)

Status
 Photo / Video
 Event, Milestone +

What's on your mind?

K.W. Montroy Funeral Home
 Wednesday via Obituaries

Rose Harper - 2012-10-05

Peacefully while in the loving presence of his family on October 5th, 2012. Beloved child of and . Cherished Brother of . Missed by his . Loving Grandfather of . Will be remembered by his children, . Visitation to be held at Friends Funeral Service, on October 9th, 2012, at 12:00pm - 1:45pm. Service to be held at K.W. Montroy Funeral Home, on October 9th at 2:00pm. If you so desire, donations to , , , or would be appreciated.

Zander Funeral Home
Published: 2012-12-05 14:01:02 EST

[Like](#) · [Comment](#)

K.W. Montroy Funeral Home
 Wednesday via Obituaries

Joyce Barnes - 2012-08-21

Joyce Marie Barnes, 73, passed away on August 21st, 2012, in Kingston, ON. she was born in Kingston, ON on December 14th, 1938 to the late and . Joyce is survived by her loving wife, Adam; Jonah; Lisa; ; Rebecca and Stephanie; ; Rebecca Barnes and Stephanie Barnes; ; . A Celebration of Joyce's Life will be held 2:00pm on July 13th at K.W. Montroy Funeral Home. In lieu of flowers, contributions can be made to Trust Fund for Alex Barnes, Diabetes Association, Cancer Society. Condolences may be shared at davisseawinds.com.

Zander Funeral Home
Published: 2012-12-05 14:37:47 EST

[Like](#) · [Comment](#)

To update an obituary already posted to Facebook, delete the record from your Facebook page and then go to Main > Book Of Memories > Facebook Record Management. Click the Re-Post button to the right of the record.

Records				
Date of Death	Deceased Name	Last Posted Date	Post Status	
2012-12-05	Val Barnes		Ok	Re-Post
2012-11-22	Ronald Jones	2012-12-06 09:24:04	Ok	Re-Post
2012-10-01	Emily Hayworth	2012-12-06 09:25:06	Ok	Re-Post
2012-10-05	Rose Harper		Ok	Re-Post
2012-08-24	Mike Hepburn		Ok	Re-Post
2011-12-29	Rachel Shawley		Ok	Re-Post
2012-08-21	Joyce Barnes	2012-12-06 09:29:06	Ok	Re-Post

Page 162 of 589



Note: The record will say 'Pending' until it auto posts to Facebook (15 minutes). There is no way to change how the information appears / displays in Facebook.

If you have a Twitter account and would like your obits to push to it as well, [download the Twitter app from your Facebook account](#). Anything that is posted to Facebook will then post to Twitter.

[<< Add Record to Veterans Memorial Wall](#)

[Mobile Case Management >>](#)

Mobile Case Management

Whether controlled on a smaller cell phone screen or a larger screen such as an iPad or tablet, the Mobile Manager uses responsive technology that auto-adjusts its sizing to be highly functional on any sized device. Some of the features include the ability to add new deceased records, edit existing records, create and modify obituaries, view today's service schedule, access a rolodex of business contacts, submit support requests, access past death records through an easy-to-use search function, and view system announcements.

This app is for the use of our funeral home clients, not their families.

✿ If you would like to have access to this app, [contact your FrontRunner Success Coach](#).

- If you don't have a mobile site, click on Admin at bottom of page.
- If you do have a mobile site, click on 'Full Site' and then scroll to 'Admin' at bottom of page.

Once you click on 'Admin', the login screen will appear. To save the site as a bookmark/icon on your iPhone*:

- Hit the share icon.
- Select 'Add to Home Screen'
- Select what you would like to call the icon.
- Select 'Add' or 'Save'

To save the site as a bookmark on your Android phone*:

- Save to Bookmarks
- Choose a label name.
- Select 'Add to Home Screen'.
- Select 'Add' or 'Save'

✿ These directions will vary depending on the type of smartphone and browser being used.

Enter your Username and Password to access the system.

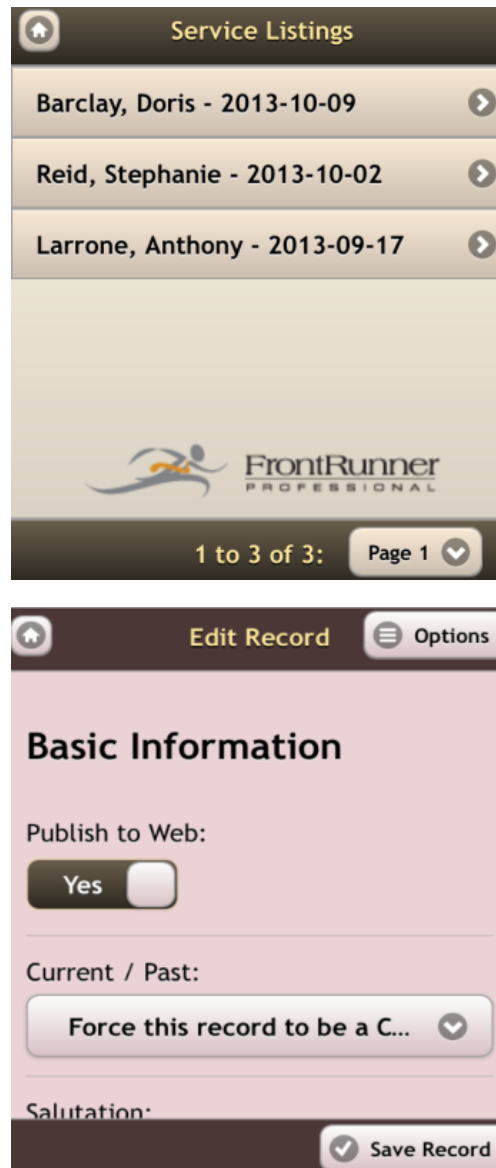
The image displays two screenshots of the IMS Mobile application interface. The top screenshot is the login screen, featuring a dark header with 'IMS Mobile' in yellow. Below the header, there are labels for 'Username:' and 'Password:' followed by input fields with placeholder text 'Enter your Username' and 'Enter your Password'. A 'Login' button is positioned below the password field. At the bottom, there is a logo for 'FrontRunner PROFESSIONAL'. The bottom screenshot shows the main menu after login, with a similar dark header. It contains four large buttons: 'View Records', 'Create Record', 'View Schedule', and 'Logout' (which includes a small 'x' icon). The 'FrontRunner PROFESSIONAL' logo is also present at the bottom.



Click on the 'Home' Button at top left of screen at any time to return to the main screen.

Choose to View Records – Create Record – View Schedule – or Logout

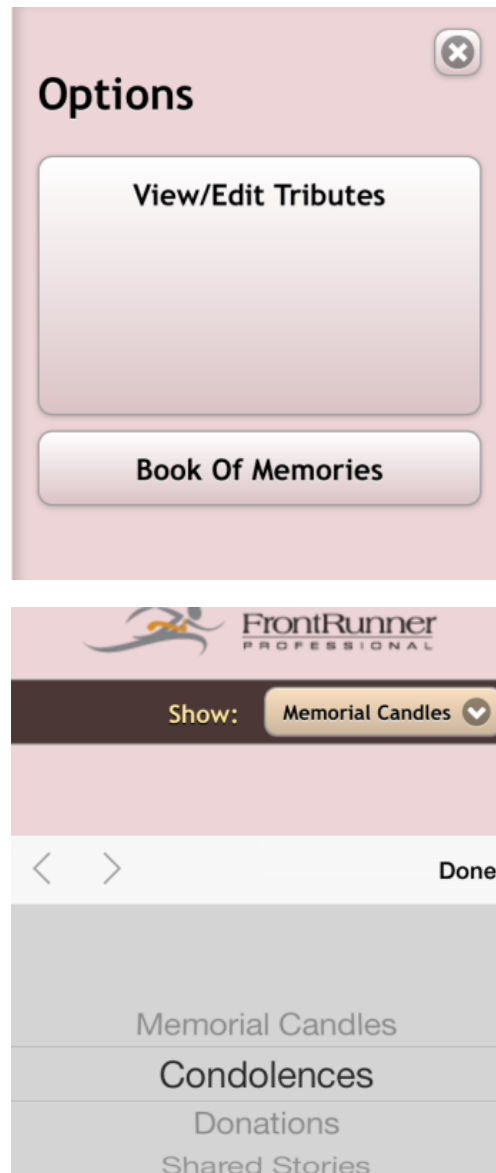
View or Edit Records: All records will be listed. Click on the one to view or edit. All Basic Information will be accessible to change. Scroll down to the section that requires changes and enter the information. Press 'Save Record' at bottom right of screen.



To access additional options, press 'Options' at top right of screen.

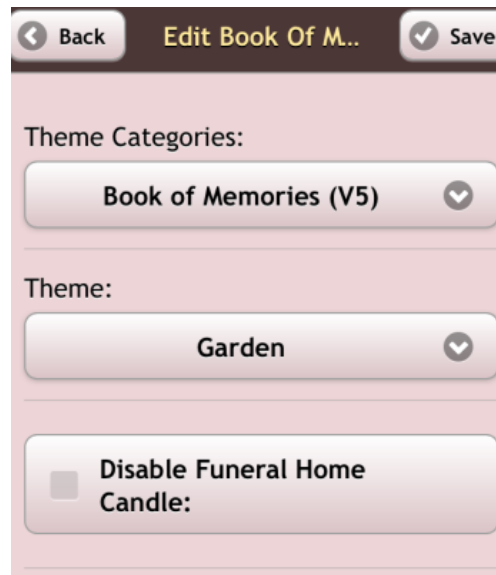
Press 'View/Edit Tributes to access 'Memorial Candles'. Press the 'Memorial Candles' arrow button at bottom right of screen to access 'Condolences', 'Donations', and 'Shared Stories'.

Press the 'Back to Record' button at top left of screen to return to the 'Edit Record' screen.



To change the Book of Memories theme, choose the 'Category' and then 'Theme' to select. Scroll down to see all other available options:

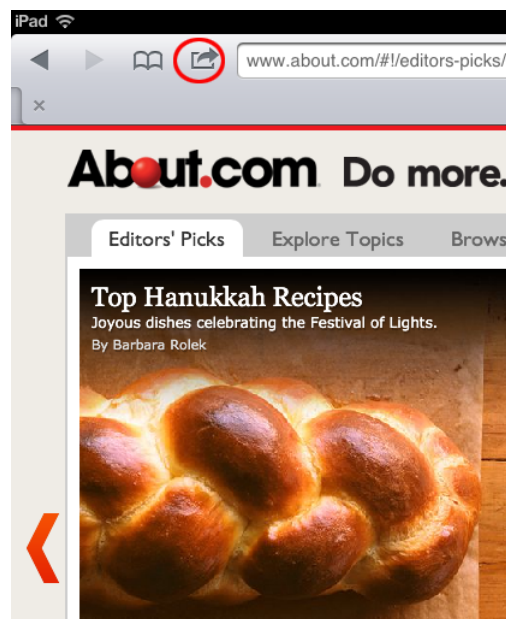
- Disable Funeral Home Candle
- Disable Anniversary Notification
- Photo & Story Approval System Settings
- Press 'Save' at top right of screen when complete.
- Press 'Back' at top left of screen to return to the 'Edit Record' page.



To access today's schedule, press Services, Visitations, or Dispositions from the schedule screen.



Note: Add to home screen or bookmark on newer devices (top) or on older devices (bottom):



[<< Post Your Obits to Facebook](#)

[FAQs on Records >>](#)

FAQs on Records

Below are a list of common questions regarding records. If you are still unable to find a solution to any problem that you are experiencing, please contact support@frontrunnerpro.com.

Question: I am trying to upload an image but it's not working. What am I doing wrong?

Answer: The most common reason why an image won't load, is its size. Before uploading, please ensure that the size of the image is equal to or smaller than 1280×1024 pixels. Optimizing images for the web is also recommended. This can be done by adjusting the DPI to 150 or lower. Also, it's important to note that the bigger the image, the longer it will take to load for your online visitors. Another common problem is photo file names. The names should not contain any special characters (commas, #, &, apostrophes, etc..) otherwise the image may break. Rename the photo using only numbers and letters before uploading it into the system.

Question: I've just created a new record and I can't find it under Current Services. Where did it go?

Answer: There are two reasons that a new record may not be saved as a Current Service.

1. The date of death was not entered and saved. Without a date, the system is not instructed to place the record in the Current Services category and will instead file it under Past Services category by default.
2. The date of death is prior to the number of days a record is considered current in your system. This can be adjusted through a) System Settings > Profile > General section > Number of days a record is current or b) Record > Web Details > Basic Information > Current/Past. This will force a record to be current within the system but change it back following the service otherwise it will remain 'current' forever.

Question: I have set a record to be current but it is not showing up on the home page of my website. Why?

Answer: The home page will only list a certain number of names. Example: If you go to the current services page on your website, the specific record may be on page 2 listed as the 12th record. Your home page may only show 8 records.

Question: How can I show more records on my Current Services page?

Answer: Login to your system and navigate to Website. Go to Current Services page and click Edit Page Details > Edit Content. You will see a drop down for “Number of records per page”. Choose a number and then click on Save.

Question: How can I sort the records on my website by service date?

Answer: Login to your system and navigate to Website. Go to Current Services and click on Edit Page Details > Edit Content. You will see a drop down for “Current Funeral listing order”. Choose ‘By date of death’; ‘By last name’; or ‘Service date’. Save.

Question: The information I’m entering is not saving properly. How can I fix this?

Answer: If you are experiencing save issues, please make sure you only have one browser window open at a time. If that isn’t the problem, try clearing your cache ([refer to the FAQ – General](#)) or close all windows and navigate back to your site login page. By following any one of these steps, you should be able to save the information without any issues.

Question: How do I delete a funeral record?

Answer: There are times that you may need to delete a funeral record from the system. However, if you only want to remove the funeral record from the website, simply hide the record instead.

To hide a record:

1. Open the record.
2. Select the “Edit Record Settings” button at the top right.
3. Change the “Publish to Web” drop-down menu to No.

To completely delete a record from the system:

1. Open the record.
2. Select the “Edit Record Settings” button at the top right
3. Click the “Delete Record” button.

Question: We create our own videos. How can I upload them into records?

Answer: There is currently no option to upload your videos into the system. If you use another third-party company, copy its URL into your record in the Video Link field. However, there are two options within the system to [create Digital Video Tributes](#). [Contact your Success Coach](#) for more information.

Question: Why can't I see the new file number I have added to a record?

Answer: File numbers are automatically generated when a new record is created. These numbers can be changed at any time but your browser may not immediately update the information.

This can be resolved by a 'refresh' or a 'cache clear'.

1. To refresh, press F5 on your keyboard or click the refresh button at the top of your browser. If a refresh does not work, proceed to step 2.
2. Clear your cache by going to Tools at the top of your browser > Options. The various browsers use different settings but you will be presented with options to view or delete Browsing History. This will clear the browser's memory and the new file number will be visible the next time the record is loaded.

Question: How can I find an older record that is not appearing within the list?

Answer: To locate an older record in the system, go to Main > All Records. This will display all records in the system. Type in the name in the search box or click on the first letter of the deceased's last name. There is also an Advanced Search option to filter your search by name, client number, service date and/or date of death.

Question: How can I change the length of time that records are listed as 'current'?

Answer: To adjust the length of time that records are listed as current:

1. System Settings > System Profile > General Settings.
2. Change the days to a smaller or greater number.
3. Save.

Question: How can I delete a record?

Answer: To delete a record, open the record through the Main tab.

1. Click on "Edit Record Settings" at top right.
2. Click on "Delete Record" at bottom right in new window.

Question: How can family members receive condolence emails?

Answer: When a record is created, funeral homes have the option to build a condolence email list. Any emails listed will receive condolences once a day. There are various reasons why families are not receiving these emails:

- The email address was spelled incorrectly in the record
- The email addresses were not separated by commas when they were entered. *Note there are no spaces in the comma separated list. Example: john@smith.com,mark@smith.com,debbie@smith.com
- The emails have not been sent by the system yet.

If this issue persists, [contact us](#) to trace and verify the e-mails sent.

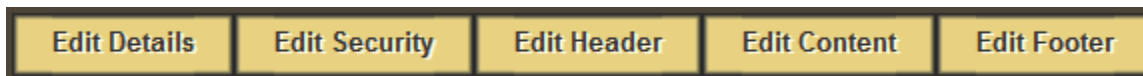
Edit / Publish Your Website

You can access the administration of your website at any time to add, edit, and delete content; rename, hide, or move pages; and update your messaging and links for online visitors. Changes can be made and published quickly.

Navigate to your Website tab in the top menu of the system to display your website's home page.

* To maximize the screen for editing, select **Collapse Menu** above the menu on left. You can Expand the Menu at any time to access menu items.

To make changes to a website page, navigate to the page. Depending on the page module, you will see one of two menu options:



- Edit Details: Edit the page title, enter search keywords and descriptions, and access all of the modules. Modules are different page types that determine how the page will function.
- Edit Security: Access security to apply secure (login) access to a page outside of administration.
- Edit Header: Add additional content to the top of the page.
- Edit Content: This button is used most often to change the page content (text, pictures, hyperlinks).
- Edit Footer: Add additional content to the bottom of the page.



Mouse over 'Edit Page Details' to access:

- Edit Content: This button is used most often to change the page content (text, pictures, hyperlinks).
- Edit Details: Edit the page title, enter search keywords and descriptions, and access all of the modules. Modules are different page types that determine how the page will function.

- Edit Security: Access security to apply secure (login) access to a page outside of administration.
- [Web Page Editing](#)
- [Manage Web Page Settings & Files](#)
- [Advanced Website Editing](#)
- [Wireframe Editing](#)
- [Publish Website](#)
- [FAQs on Website](#)

Web Page Editing

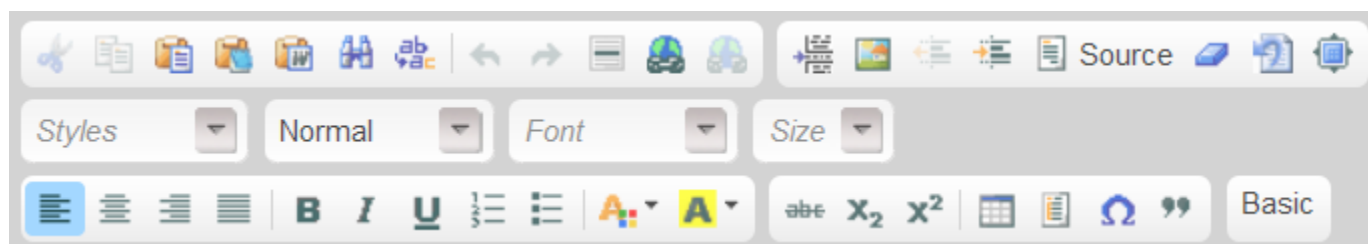
Basic Website Editing

A WYSIWYG module (What You See Is What You Get) is the default module for all new pages and functions like Microsoft Word.

* Most pages use the WYSIWYG editor within the main body, header and/or footer. While the page loads, some code will appear for a brief time; this is the HTML generated by the module.



Edit Page – Click on the **Advanced** icon to access all menu feature icons of this module.



Type in text to the page or copy and paste from another source.

! If you are copying and pasting from another source it is highly recommended to copy and paste into Note Pad first, then copy and paste into your Web page.

Once complete, the font, font size, font style and color of the text can be changed BUT this is not necessary. The website design incorporates a default font and font size to ensure a consistent look on all pages.

Text Styling Options: bold, italic, underline or strike-through

Styles: Apply pre-defined combinations of various formatting options to block and inline elements.

Normal: Apply pre-defined block-level combinations of various formatting options.

Font: Change the typeface, font size, color, or background color of the text.

Text Layout: Set alignment to left, center, right or justified.

Rich Text: Create a numbered or bulleted list.

Other Basic Editing Topics:

- [Add a Photo](#)
- [Create a Link/Hyperlink](#)

[<< Edit / Publish Your Website](#)

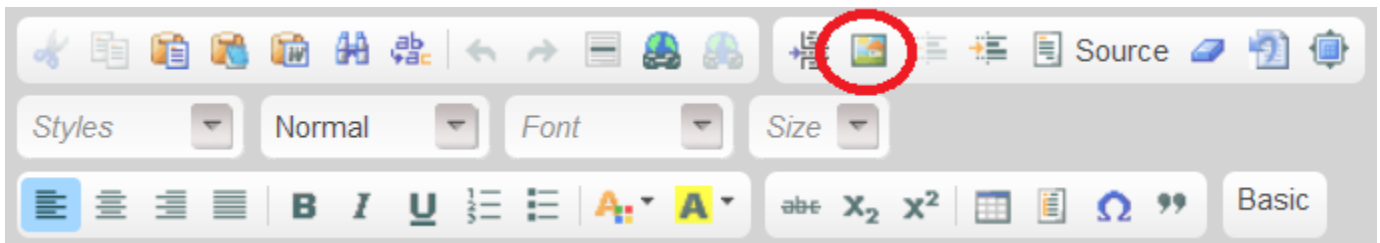
[Add a Photo >>](#)

Add a Photo



Place the cursor where you would like the picture to display either on a new line (larger image) or at the beginning of a paragraph (text to wrap around a smaller image).

Select the **Advanced** icon then the Image – Insert an Image icon.



A pop-up window will appear with the following options:

My Images

These images are currently loaded in the system. Scroll through until you find the image you need; click to highlight and click on OK.

Upload Image

My Images Upload Image

Select a file to upload from your local hard drive





Choose a file to upload: Browse... No file selected.

(Valid file types are: GIF, JPEG and PNG)

Upload to the Unsorted category

Description:

Additional image enhancement options

☒ Auto-resize large images ☐ Change width to ___ pixels

☒ Auto-optimize to 60 % quality ☐ Change height to ___ pixels

Cancel Ok

Browse to the file on your computer and open. There are several ways to adjust the image:

- Auto-resize large images – forces the image to be contained within the actual width of the page.
- Auto-optimize to 60% quality – adjusts the quality of the image to make it faster to download (lower quality = faster download).
- Change width to ___ pixels – use one of two sizes: 250 for smaller images if you want text to wrap around or 450 if the image is to appear the full width of the page. You can always shrink down once the image is on your page.
- Change height to ___ pixels – the height will automatically adjust when width of image is changed (do not adjust both the width and the height otherwise the image will be distorted).


Image Properties

Once the image appears on your page, double click on it or right click to access > Image Properties.

Image Properties

Image InfoLinkAdvanced

URL

Alternative Text 

Width


Height




Border

HSpace

VSpace

Alignment

Preview




- **Alternative Text:** Add text to describe photo in the event that the image doesn't display properly for online visitor and to help with search engine optimization.
- **HSpace:** Add padding (pixels) to the right/left side of the photo (recommend 10) to create space between image and text.
- **VSpace:** Add padding (pixels) to the top/bottom side of the photo. (recommend 10) to create space between image and text.
- **Alignment** – select whether the image will sit on the right or on the left. This option is used when you have a smaller image on your page.

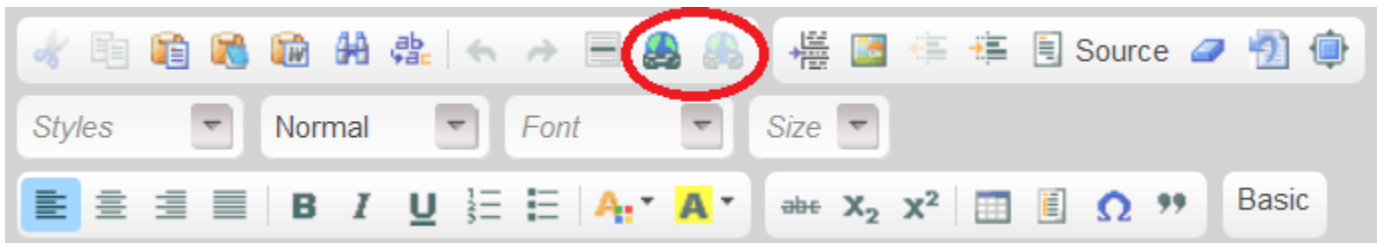
[<< Web Page Editing](#)[Create a Link/Hyperlink >>](#)

Create a Link/Hyperlink

It only takes a few seconds to create a hyperlink to another page on your website, an external website or email address, or a file.



Highlight text or a graphic to link and click on the Link icon in menu:



A pop-up window will open. Choose from one of the link options:

1. My Site – link to any page on the website.
2. External or Email Link – link to an email address or URL. *Note: when linking to an external website, check 'Open link in new window'.
3. File from my Folder – link to a file (ex: PDF). Note: The file must first be loaded into the system before linking to it. [Click here for information on how to upload a file.](#)

If you need to edit the link once it's created, right click the link. Link: Change the URL and/or set the Target to determine how the link will open (ex New window (_blank) option will open the link in a new browser window).

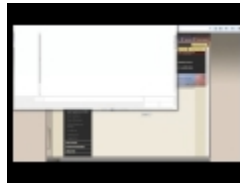
To delete a link, highlight the link and click the icon to the right of the Link button in the menu.

[<< Add a Photo](#)

[Add Staff Members >>](#)

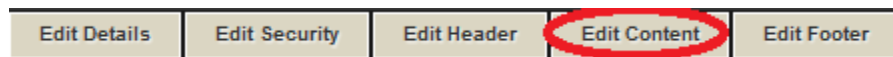
Add Staff Members

The Staff Directory module allows you to easily add information about your staff as well as pictures. Fill in the fields and the module will generate a professional page that features names, titles, images, bio and contact information.

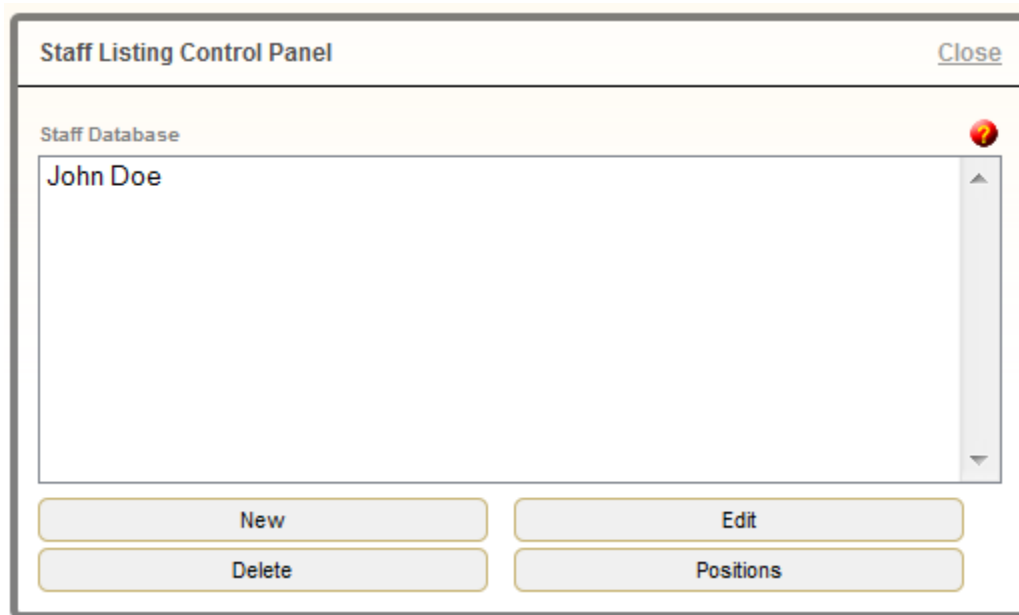


Navigate to the staff page on your website. If you require a new page, refer to [Create a New Page](#).

Click 'Edit Content' to access the Staff Listing Control Panel.

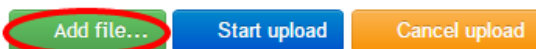


- New – add a new staff member.
- Edit – edit an existing staff member listing.
- Delete – delete an existing staff member listing.
- Positions – change the order of how the staff members are listed on the page.

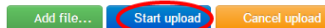
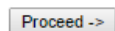


* Only those fields with information added will be visible on the page:

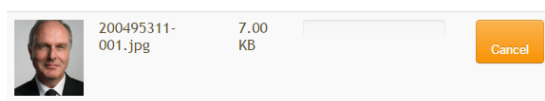
- Visible – This can be useful if, for example, a particular staff member is on leave and you don't want to delete the listing from the directory.
- Position – Ignore – it's much easier to adjust this by clicking on 'Positions' within the Control Panel
- Layout – Specify whether the person's picture will appear on the left or the right of the text description.
- Picture – Upload Picture > Add File > Start Upload > Proceed



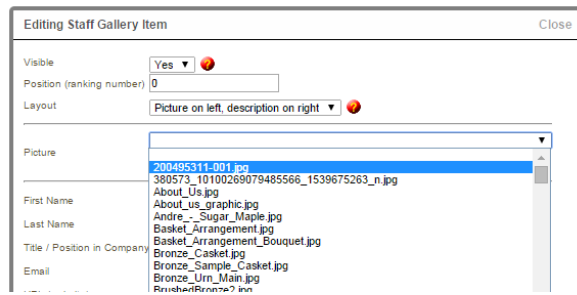
Please note that the photo can not exceed 2MB.



Please note that the photo can not exceed 2MB.



Then select the image filename from the dropdown list.



- First Name, Last Name, Title / Position in Company
- Email, URL (website), Toll Free Phone, Office Phone, Fax Number, Home Phone, Mobile Phone.
- Description – a short summary (bio) of the individual or the job they perform.
- Edit 'MORE INFO' Page – This will open a WYSIWYG page to enter a more detailed description (bio) of the staff member that will open from the listing.
- Save

[<< Create a Link/Hyperlink](#)

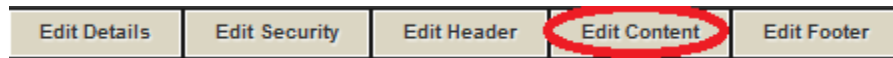
[Add Facility Photos >>](#)

Add Facility Photos

The Picture Gallery module displays images and descriptions.

Navigate to the Facilities page on your website. If you require a new page, refer to [Create a New Page](#).

Click 'Edit Content' to access the Picture Gallery control panel.

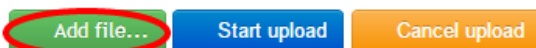


- New – add a new picture
- Edit – edit an existing picture
- Delete – delete an existing picture
- Positions – change the order of the pictures on the page

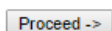
Available fields within each picture listing:

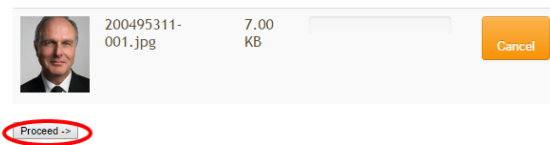
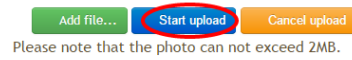
- Visible/Hidden – If an image is hidden, it remains within the control panel but not visible to online visitors.
- Position – Ignore and use the Positions option within control panel.
- Layout – Determine whether an image will display on the left or right of the descriptions.
- Action when clicked – Select if the picture will open normally, full page or in a new window.
- Picture – Upload Picture to load photos to the website. The main picture should be a larger version of the thumbnail size.

To upload a picture, Upload Picture > Add File > Start Upload > Proceed

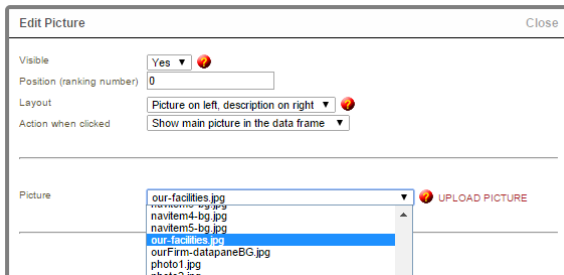


Please note that the photo can not exceed 2MB.





Then select the image you uploaded from the drop-down menu.



- Title – Choose the font, font size, color and effect
- Description – Choose the font, color and effect
- Save

Edit Picture [Close](#)

Visible

Yes

Position (ranking number)

Layout

Picture on left, description on right

Action when clicked

Show main picture in the data frame

Picture

[UPLOAD PICTURE](#)

Title

Font

Arial

Size

2

Color

Effect

Bold

Description

Font

Arial

Size

2

Color

Effect

Save

[<< Add Staff Members](#)[Add Products >>](#)

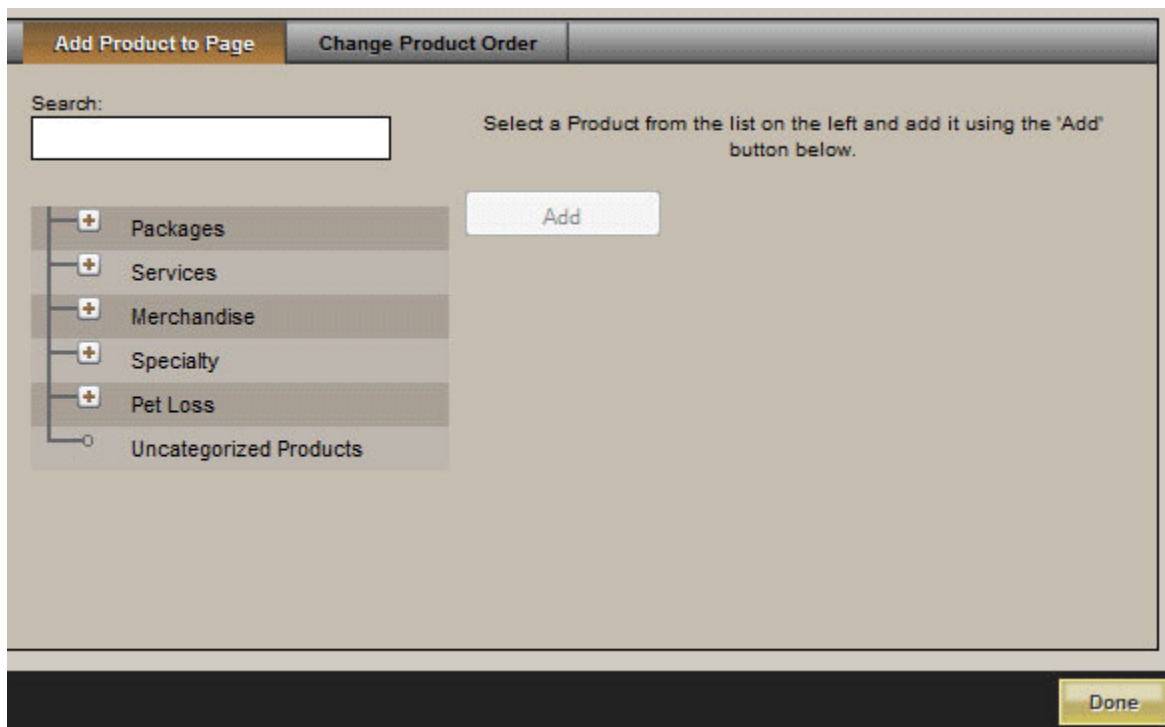
Add Products

The Integrated Product Catalog displays products added to the Product Database. Various products are pre-loaded into the system but more items can be added at any time.



Navigate to a product page on your website. If you require a new page, refer to [Create a New Page](#).

Add Product



A pop-up window will appear. Use the + to expand the categories until a particular product is located. When a product is selected, the image will load on the right with the name and code. To add that product to the page, Add. Repeat until all products for a page are added.

Change Product Order

There are 4 options:

1. A-Z – list the products alphabetically.
2. List according to pricing (high to low).
3. List according to pricing (low to high).
4. Drag and drop within the list.

When complete, Apply and Done.

To delete a product from the page, select Remove from below the image.

[<< Add Facility Photos](#)

[Manage Web Page Settings & Files >>](#)

Manage Web Page Settings & Files

See one of the topics below to manage your website's page settings or upload a file.

- [Organizing Web Pages](#)
- [Create a New Page](#)
- [Page Settings](#)
- [Upload a File](#)

[<< Add Products](#)

[Organize Web Pages >>](#)

Organize Web Pages

Create, move, rename, re-parent or delete web pages. The website navigation can be restructured within minutes.

Navigate to Website > Manage > Site Map.

The Site Map is presented in a tree style layout. All pages contained within the menus across the top or left side of the site are arranged in the order they appear.

Floating Pages are those pages not contained within the navigation. They can only be accessed via a link.



Arrow buttons:

- Dark arrow button pointing right: represents a menu item that has child pages. Click arrow to expand the menu and reveal all the pages below.
- White arrow button pointing right: represents a menu item that has no child pages.
- White arrow button pointing down: represents an expanded menu.

Move a Page > Select the MOVE button beside the page you would like to move. Select the MOVE HERE button where the page needs to be located.

Rename a Page > Click on any page name to change the name. A pop-up will appear. Replace Label name with new page name.

Delete a Page > Select the TRASH button beside the page to be deleted. Please note: this will permanently delete the page.

Hide a Page > Select the HIDE button beside the page to hide. When a page is hidden, its name will be surrounded by brackets within administration. The page won't be visible to the public.

Unhide a Page > Select the UNHIDE button beside the hidden page to unhide. The brackets surrounding

the page name will disappear.

Undo/Redo a Change > Use this feature to reverse changes made in the Site Map. Anytime an action is performed in the Site Map, it can be undone.

Save



Top Menu Navigation: This navigation level is not accessible to edit.
Main Navigation: These pages are visible within the left or middle menus.

[<< Manage Web Page Settings & Files](#)

[Create a New Page >>](#)

Create a New Page

Quickly add a new page to your website.

Navigate to Website > Manage > Site Map.

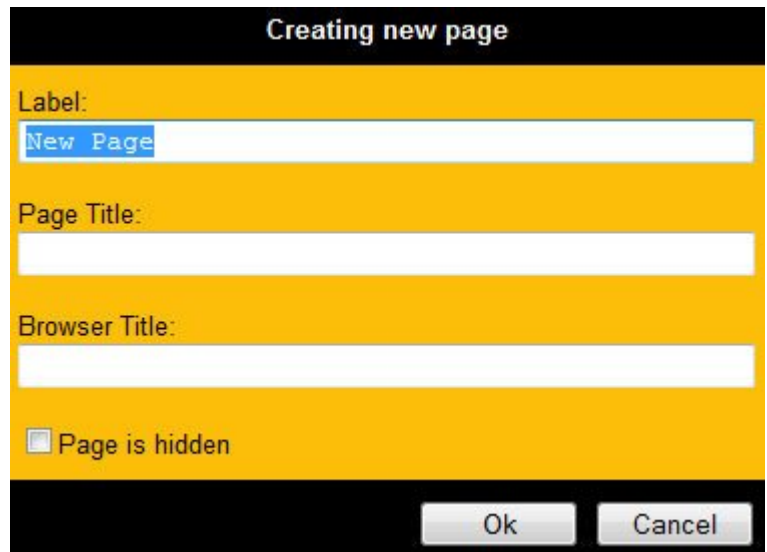
An ADD link is found within each section of the Site Map. Click on any of the arrows to show the child pages/sub-pages to locate the section where the new page will be created. Click the ADD link at bottom of that section. A pop-up will appear. We suggest filling in the following fields to improve your website's search engine performance.

1. Label – page name – word(s) visible within the menu.
2. Page Title – is normally displayed above the main text on a web page. It's recommended that the title is different than / expands on the label name. This will help with your Search Engine Optimization as well as all Quick (keyword) Searches on the website. If, for example, a page Label is 'Directions', the Page Title could be 'Directions to 'Funeral Home Name'.
3. Browser Title – is displayed along the top left of the web browser. It can describe the page content and include important keywords to help with the website's Search Engine Optimization. The Browser Title is also indexed by FrontRunner Professional and is used by the Quick Search keyword functions on the website.

Click Ok.

Once a page is added, it can be moved anywhere in the navigation including Floating Pages*. Use the arrows to expand the menus and find the spot where the page will be located. Click on the 'Move' button beside the page to be moved. Click on 'Move Here' where the page needs to be located. Save.

*Floating pages are not contained within the regular navigation. For visitors to access a floating page, it must be linked from another page/source. To learn how, [refer to the Creating a Link](#) section.



[<< Organize Web Pages](#)

[Page Settings >>](#)

Page Settings

Before adding content, it's important to edit the page's settings.



Navigate to Website > Edit > Site: Navigate to the new page. Select the Edit Details button at the top right. There are 3 sections that should be checked and corrected if required:

- Page Settings – Enter all the necessary information (Page Title and Browser Title)
- Optional Settings – Add search keywords (also called metadata) and descriptions for the search function.
- Page Action – By default, new pages are set to use the WYSIWYG Module (refer to [Website Editing](#)). There are many page modules; select the one that will best display the page's information.

Page Settings		Close
Visibility	Visible ▼	
Text to place on menu	Who To Call First	
Page title (if different from text on menu)	Who To Call First	
Browser title (if different from page title)	Who To Call First	

Child Browser Settings		Close
Child Browser Title		
Child Browser Description		
Child Browser Image	Browse... No file selected.	

Optional Settings		Close
Custom Template	Default Template ▼	
What is the email address or external web page URL?		
Where should the page be opened?	Open within the data frame ▼	
How should this page open when smartlinked?	Open normally ▼	
What should be webpage's filename?	Who_To_Call_First_90	
Search Keywords		
Search Description		

Page Action		Close
What should happen when the button is clicked?		
<input type="radio"/>	Do nothing - This will not invoke any action when the button or menu item is clicked. This is commonly used when you do not want one of your main (5) navigator buttons to open a page. In these cases your drop down menu items will act as navigators.	
<input checked="" type="radio"/>	Open a PageMajic WYSIWYG page - One of the most powerful and commonly used modules in SiteMajic. This module is a WYSIWYG editor for web pages (What You See is What You Get). It allows you to rapidly create rich pages of text, graphics and SmartLinks. With the use of tables and other features you can edit text and quickly control fonts and colors. If you've ever used a word processor you will instantly be at home with the SiteMajic Designer module.	

Save. Edit Content to add content to the new page.

[<< Create a New Page](#)

[Upload a File >>](#)

Upload a File

Upload any file such as Word or PDF documents to your website.

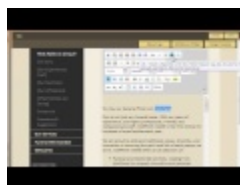
Navigate to Website > Manage > Files.

Choose up to 5 files from your system for upload:

<input type="button" value="Browse_"/>	No file selected.
<input type="button" value="Browse_"/>	No file selected.
<input type="button" value="Browse_"/>	No file selected.
<input type="button" value="Browse_"/>	No file selected.
<input type="button" value="Browse_"/>	No file selected.
<input type="button" value="Upload File(s)"/>	

Select one of the Browse buttons to upload a file / document (jpg gif pdf etc.). Locate the file on your computer and click Open. (When uploading video files, please make sure they are either in a .avi, .mov or .wmv format.) Up to 5 files can be uploaded at a time. Select Upload File(s). A status pop-up will appear. When completed, click 'Close'.

The file(s) will appear in the website's personal folder. To make the files accessible to online visitors, create a hyperlink from text or images. To create a link, refer to [Creating a Link](#).



[<< Page Settings](#)

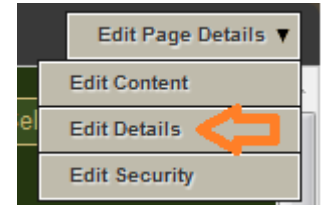
[Advanced Website Editing >>](#)

Advanced Website Editing

Page Modules

There are many different page types you can create.

To determine which module is applied to a page, click 'Edit Details'. Scroll to Page Action, the fourth section on the page to find which module is marked. Click on any module to learn more information.



- [WYSIWYG Module](#) – similar to working in Microsoft Word. Edit text, add photos and hyperlinks.
- [Business Directory Module](#) – Quickly generate a listing of local businesses. The module generates a professional directory that can include a description of the business and contact information including phone numbers and website URLs. Corporate logos or photographs can also be added to enhance overall sophistication.
- [Calendar Page](#) – Create and manage an online calendar of events.
- [Frequently Asked Questions Module](#) – This module creates a professional looking page to display common questions and answers. The list of questions appears at the top of the page; each is linked to its answer.
- [Open an Email Form](#) – Create a custom e-mail responder form for interactive feedback.
- [Open a Guest Book Module](#) – This module encourages online visitors to sign the Guest Book and leave a comment. This could also be used as a feedback area where others can read comments about your funeral home services.
- [Open a News / Newsletter page](#) – A simple way to create and update a web log or news page. Similar to a WYSIWYG page, your newsletter, upcoming events, images and hyperlinks can easily be posted to the page. Unfortunately, this module's mailing list is not equipped to check for SPAM. If you would like to email newsletters, we encourage you to visit [Constant Contact](#).
- [Picture Gallery Module](#) – Add photos, titles and descriptions. When pictures are clicked, a larger image opens.
- [Open a Product Catalog](#) – Use this product module for e-commerce. Quickly generate a product page where graphic and text orientation is controlled. The header and footer both use a WYSIWYG editor to help create a professional looking page.
- [Open a Poll](#) – An easy way to create a survey and receive results from online visitors.
- [Staff Gallery Module](#) – Easily create and modify your staff listings.
- [Child Browser Module](#) – View the secondary navigation (child) pages on the main navigation page.

- [Contest Module](#) – Hosting online contests. Features random selection of individuals and downloadable spreadsheets of entrants' information.
 - [External Web Page Module](#) – Page link takes online visitors directly to the external website of an affiliate or promotional business or organization. The website opens in a new browser window so visitors never leave your site.
 - [IMS Integrated Product Catalog](#) – Pull products from the products database and place them on a product web page. Any updates made to the product database will automatically update the products added to web pages.
- [Open a Quote Builder](#) – Allows you to generate a professional price builder of any product, or service you offer. This highly flexible module automatically calculates the total on the fly providing the user with an instant total for the goods and services they require. You control whether an item can be ordered in multiples, is a mandatory item or only one selection per section.
- [Site Map Module](#) – Provide an overview of the website and easily navigates to any portion of it from a single page; search capabilities are also provided.



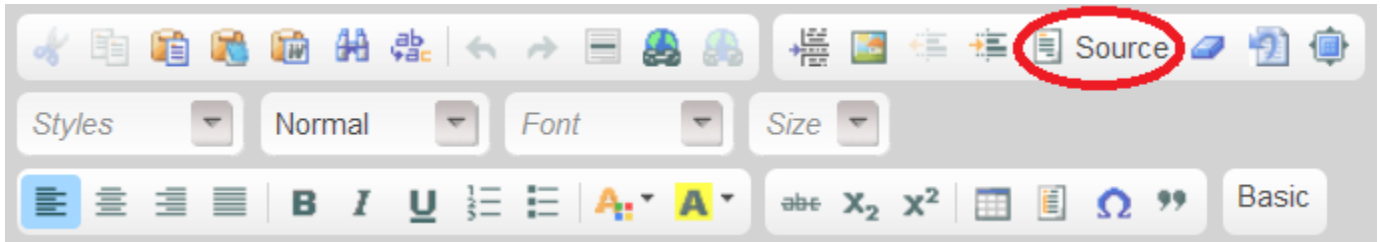
If you choose to change the page module on an existing page with content, when the module is changed, all content will be deleted. If you wish to keep the content, copy and paste it into another file (Word or NotePad) before changing the module. The old content can then be copied from other source.

[<< Upload a File](#)

[Uploading a Video >>](#)

Uploading a Video

It is possible to add a video to web pages. Ideally, the video will be loaded and operational within YouTube or a similar web system. It can then be linked from your website or the video can be embedded on the page. Choose the option from YouTube (for example) to Share – Embed video. Copy the code supplied and then choose Source from the menu.



To display a video that is not contained within YouTube or similar system, it must be in a .swf format. (“Any Video Converter”: <http://www.any-video-converter.com/>) Upload the file through the Website > Manage > Files. Browse to the file and click Open. Access the Source (HTML) of page within menu and add the source code.

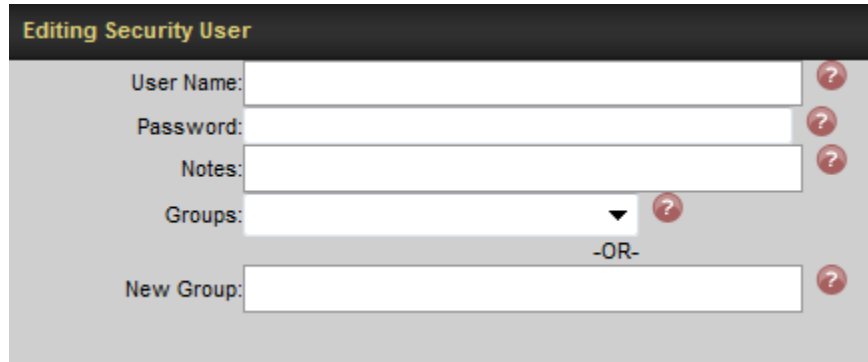
[<< Advanced Website Editing](#)

[Password Protected Page >>](#)

Password Protected Page

By setting up security users, specific web pages can be made visible only to those who have the login information.

Navigate to Website > Manage > Security Users.



- Add Security User – Enter a User Name, Password, and any Notes (if required).
- Use the Groups dropdown to select the group for this user. If there are no groups in the dropdown, type a New Group in the field below (New Group).
- Save

Return to the web page to make secure. Choose Edit Security from the top right. Un-check Public and check specific User(s) or Group(s). Save.

[<< Uploading a Video](#)

[Add Business Listing >>](#)

Add Business Listing

The Business Directory Module quickly generates a listing for businesses in your area. The professional directory can include a description of the businesses, contact addresses, phone numbers, emails and external websites.

If you require a new page, refer to [Create a New Page](#).



This module includes [header and/or footer](#) editing capabilities.

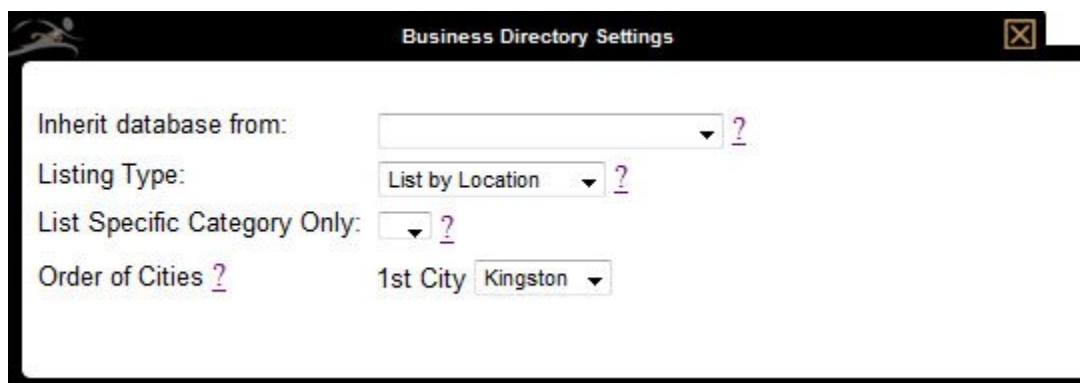
Select the 'Edit Content' button.

- New – Create a new business listing.
- Edit – Edit an existing business listing.
- Delete – Delete an existing business listing.
- Edit Settings – Change the options for this module.

Edit Settings

Inherit database from – This allows you to use the data from an existing Business Directory. It will appear with the same name used for the menu item.

It's not possible to add or remove entries from an inherited directory; changes must be made to the original directory.

The image shows a screenshot of a web application window titled "Business Directory Settings". The window has a dark header bar with a close button (X) in the top right corner. Below the header, there are four settings, each with a label, a dropdown menu, and a help icon (a question mark in a circle). The settings are: "Inherit database from:" with an empty dropdown; "Listing Type:" with a dropdown set to "List by Location"; "List Specific Category Only:" with an empty dropdown; and "Order of Cities" with a label "1st City" and a dropdown set to "Kingston".

Listing Type – Three types of listings are available:

- By Location – Will display all business listings in a particular location (city) below each header.
- By Category – Will display all business listings in a particular category below each header.
- Alphabetically – Will display all business listings in alphabetical order.

List Specific Category Only – Only those businesses within the designated category will be listed. This is useful when creating a new page using an inherited Business Directory database, and listing a specific category.

Order of Cities – Arrange the order that city headers are displayed.

Add a Business

Select the 'New' button and enter the business name.

Choose a category for this business (optional) if the listings will be sorted by category. If you do not see a specific category required, leave the drop down blank and enter the new category name directly underneath the drop down.

Enter any pertinent company information.

Enter a more info page (optional) to add more information about this company. This create a 'more info' link that opens a pop-up window containing the additional information.

Add a thumbnail picture (optional) to add a company logo.

When complete, select the 'Save' button.

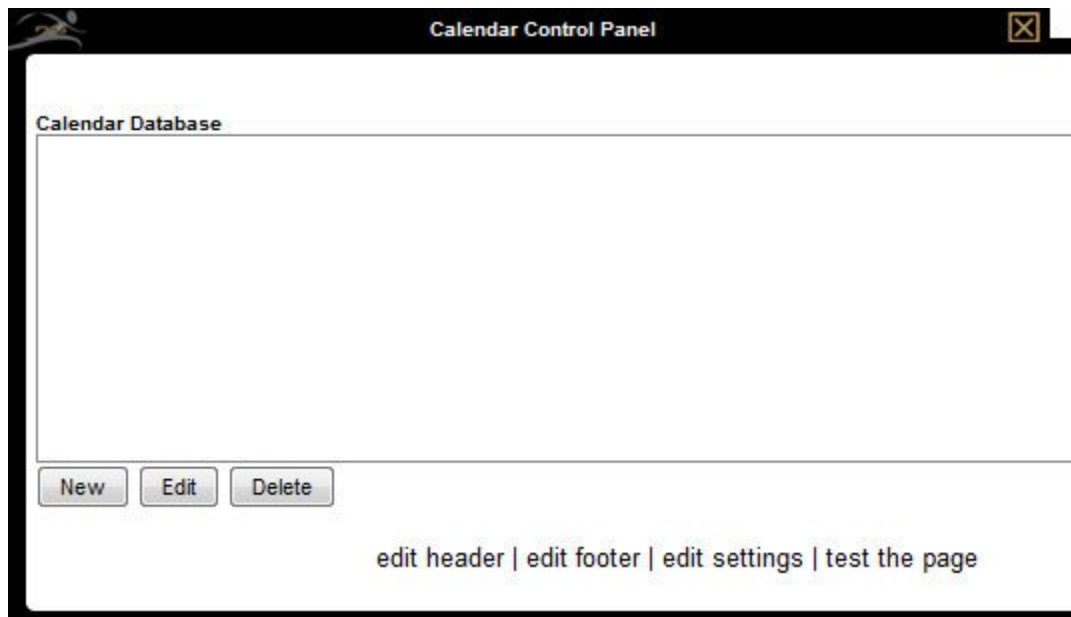
[<< Password Protected Page](#)

[Create a Calendar >>](#)

Create a Calendar

The Calendar Page Module displays upcoming events in a simple and easy-to-read calendar that contains links to event details. A calendar month will only display if the month contains an event. Events are listed in chronological order by start date.

If you require a new page, refer to [Create a New Page](#).



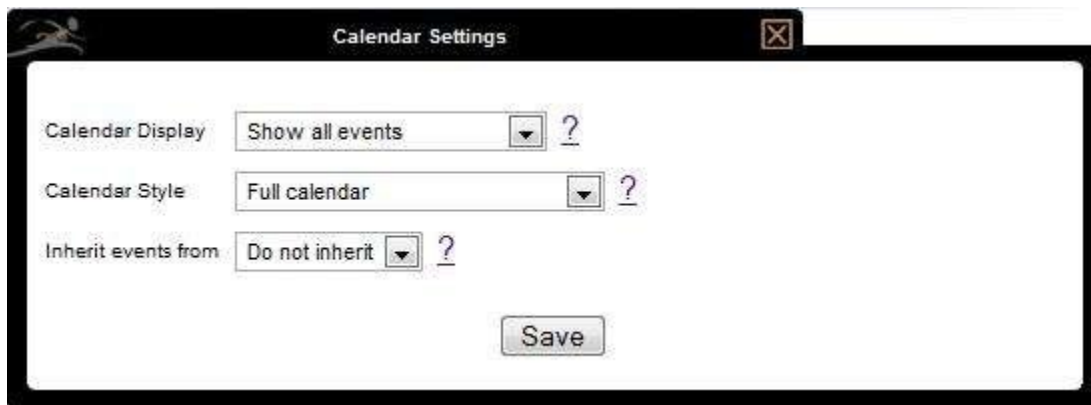
Select the 'Edit Content' button.

- New – Create a new event.
- Edit – Edit an existing event.
- Delete – Delete an existing event.
- Edit Header- Edit the top portion (header) of the page.
- Edit Footer – Edit the bottom portion (footer) of the page.
- Edit Settings – Customize the layout of the calendar.
- Test the Page – View the changes made.

Edit Settings

Calendar Display – Designates the events to be displayed.

- Show all events – All past and future events in the calendar database will display.
- Show all future events – Only events that occur during and after the current month will display. All past events remain in the database (and can be edited and saved as a current event in the future) but are not visible to online visitors.
- Show this month's events – Only events that occur this month will display. Future and past events will not be visible.



Calendar Style – Determine the layout of the calendar.

- Full calendar – The entire calendar will display.
- Full calendar without weekends – Only weekdays will display, which is useful if your events only occur Monday – Friday.

Add an Event

Select the 'New' button.

Enter the event information within the WYSIWYG editor (white content window).

Enter the calendar entry information:

Event Name – Enter a short name for the event that will appear on the calendar.

Short Description – Enter a short description, which will appear when online visitor mouses over the event name. It is also used in the pop-up when no information is entered in the WYSIWYG editor.

Start Date, M/D/Y – Use the drop downs to choose the start date, which determines where the event is placed in the calendar.

End Date, M/D/Y – Use the drop downs to choose the end date, which determines where the event is placed in the calendar.

The event will display each day from the start date to the end date.

Start Time, HH:MM – Use the drop downs to choose the start time, which will display with the event and be used for sorting purposes unless the No Start/End option is chosen.

End Time, HH:MM – Use the drop downs to choose the end time, which will display with the event and be used for sorting purposes unless the No Start/End option is chosen.

Display Method – This option determines how the calendar event displays.

- No Start/End – No start or end times will display; the event will be listed with no time.
- Start Time Only – The start time will be visible each day the event is shown on the calendar.
- Start Time Once – The start time will only be visible on the first day that the event occurs.

- Start/End Each Day – Both the start and end times will display every day of the event.
- Starts/Ends Once – The start time on the first day and the end time on the last day will display; all other days will not show a start or end time.

Recurring – Use the drop downs to select how often this event will occur.

When complete. select the 'Save' button.



Only months with events will be displayed.

[<< Add Business Listing](#)

[Guest Book >>](#)

Guest Book

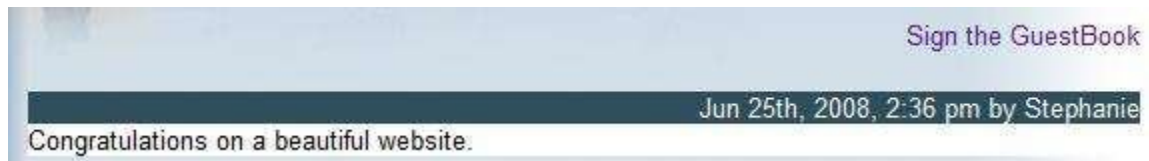
The Guest Book module creates a guest book that online visitors can sign. All entries are visible on the website page. Once the page is set up, we suggest that you monitor it from time to time. The option to edit or remove an entry is available.

If you require a new page, refer to [Create a New Page](#).

Select the 'Edit Content' button.



- Edit – Modify an entry.
- Delete – Delete an entry.
- Edit header – Edit the top portion (header) of the page.
- Edit footer – Edit the bottom portion (footer) of the page.
- Edit signing header – Edit what visitors see once they sign the guest book.
- Edit settings – Modify such settings as the amount of visible entries per page, add an image, publish email addresses, etc.
- Test the page – View the changes made.



[<< Create a Calendar](#)

[Frequently Asked Questions Page >>](#)

Frequently Asked Questions Page

The Frequently Asked Questions module creates a professionally formatted questions and answers page.

If you require a new page, refer to [Create a New Page](#).

Question #1	How many visitations can you conduct at the same time?
Answer:	We are fortunate to have both the desire and the flexibility to transform our facilities to meet the needs of the moment at hand. We have carefully pre-planned the flow of the funeral home to allow for up to three separate visitations being conducted at the same time. While a rare occurrence in this small community, we have prepared ourselves and our facility to accommodate the situation if it arises.
Question #2	Is there an area where the children can go?
Answer:	The coffee lounge has become a very popular place for the kids to congregate and be kids if they like. Our complement of staff on each visitation love to see children and are always pleased to help mom or dad to keep them occupied. With the addition of the courtyard garden, the open air within the confines of the fencing, provides an even greater opportunity for diversion.

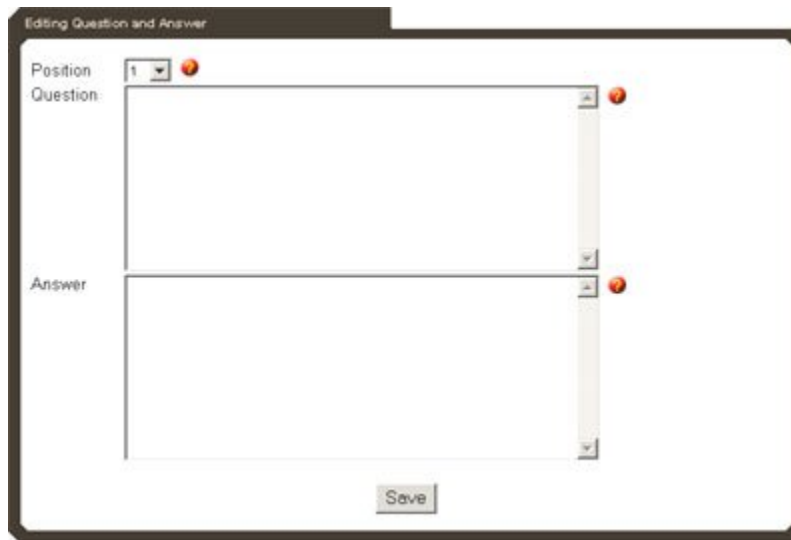
Select the 'Edit Content' button.



- New – Add a new question and answer.
- Edit – Edit an existing question and/or answer.
- Delete – Delete an existing question and answer.
- Position – Change the order of the questions and answers on the page. Click on the question to highlight and Move Up or Move Down buttons. When complete, select the 'Submit' button.

Add a Question

Select the 'New' button.



Editing Question and Answer

Position: 1

Question:

Answer:

Save

Type the question in the first window.

Type the answer in the second window.

When complete, select the 'Save' button.

[<< Guest Book](#)

[Submission/Email Form Page >>](#)

Submission/Email Form Page

The Interactive Email Forms module creates forms that online visitors can complete and submit. All submissions are sent to designated email addresses.

If you require a new page, refer to [Create a New Page](#).

Select the 'Edit Content' button at the top right.

- To edit a form, refer to the different field types below to understand how each functions.
- To build a new form, use the icons described below.

Checkbox:


- ☒ Creates a checkbox that users can select or not. More than one selection can be made.
 - Select the 'checkbox' icon. A Checkbox Properties pop-up will appear.
 - Enter the name assigned to this checkbox. (ex. Services Required) Enter the value (option name ex. Pre-arrangement).
 - When a form is submitted, the email will display the Name (Services Required) and Value (Pre-arrangement) if Pre-arrangement was selected by online visitor. If multiple checkboxes are created, the name of each one checked by online visitor will be listed in the email.

- ✿ To include multiple values (more than one clicked checkbox) in the email returned to you, add [] (left and right square brackets) after the name (ex. Services[]). All values selected (ex. Pre-arrangement, Funeral, Burial) will display in the returned email as Services=array("Pre-arrangement", "Funeral", "Burial").

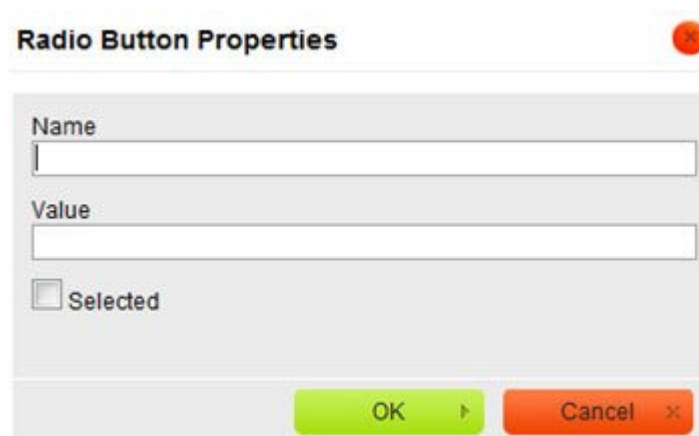
Use the *Selected* checkbox if the box will be automatically checked (default).

When complete, select the 'OK' button.

Radio Button

 Creates a circle that can be selected from various options. Online visitors can only choose one option.

- Select the 'circle' icon. A Radio Button Properties pop-up will appear.
- Enter the name assigned to this radio button. (ex. Contact Preference)
- Enter the value assigned to this radio button. (ex. Phone)
- When a form is submitted, the email will display the Name (Contact Preference) and Value (Phone) if Phone was selected by online visitor. Only the value of the one radio button selected will be listed in the email.



The 'Radio Button Properties' dialog box contains the following fields and controls:

- Name:** A text input field.
- Value:** A text input field.
- Selected:** A checkbox.
- Buttons:** 'OK' (green) and 'Cancel' (orange) buttons at the bottom right.

Use the *Selected* checkbox if you would like the radio button to be selected by default.

When complete, select the 'OK' button.

Text Field

 Insert a text field in the form.

- Select the 'text' icon. A Text Field Properties pop-up will appear.
- Enter the name of the text field.
- The value of this field is most likely the same as the name.
- **Character Width** – Enter the number of characters to define the space required for the text field. If left blank, the text field's size will be determined by the browser.
- **Maximum Characters** – Enter the maximum number of characters allowed for the text field. (ex. 10 for a phone number with area code and no spaces.) If left blank, the text field's size will be determined by the browser.
- **Type** – use the dropdown to select whether this will be a plain text or password option.



The 'Text Field Properties' dialog box contains the following fields and controls:

- Name:** A text input field.
- Value:** A text input field.
- Character Width:** A text input field.
- Maximum Characters:** A text input field.
- Type:** A dropdown menu with 'Text' selected.
- Buttons:** 'OK' (green) and 'Cancel' (orange) buttons at the bottom right.

When complete, select the 'OK' button.

Text Area



Insert a multi-line text area.

- Select the 'multi-line' icon. A Text Area Properties pop-up will appear.
- Enter the name of this text area.
- Enter the number of characters required for the width of the text area. If left blank, the text field's size will be determined by the browser.
- Enter the number of rows required for in the text area. If left blank, the text field's size will be determined by the browser.

When complete, select the OK button.

Selection Field



Insert a selection / drop down field.


- Select the 'selection' icon. A Selection Field Properties pop-up will appear.
- Enter the name of this dropdown menu.
- The value is name listed in the email sent once form is submitted. This would most likely be the same as the name.
- Size – Enter the number of options to be listed in the drop down menu.
- Enter the text and value of the first item in the drop down menu. The text is the name of the item that will appear in the drop down menu. The value is the name sent in the email.
- Click the 'Add' button.

Repeat the above steps until all options are added for the dropdown menu.

- Use the 'Modify' button to change the name of an item in the dropdown menu. To edit a listing from the first column, click the name and edit the text within the Text field. To edit a listing from the second column, click the name and edit the text within the Value field.
- Use the Up and Down buttons to change the order of the dropdown items.

When complete, click the 'OK' button.

Buttons

 Insert a button into the document form.

- Select the 'button' icon. A Button Properties pop-up will appear.
- Enter the name of this button.
- The value will be sent via email and is most likely the same as above.
- Type – use the dropdown to select the button type (submit, reset, etc...).

When complete, click the 'OK' button.



The image shows a 'Button Properties' dialog box. It has a title bar with the text 'Button Properties' and a red close button. The dialog contains three input fields: 'Name' (a text box), 'Text (Value)' (a text box), and 'Type' (a dropdown menu). The 'Type' dropdown is currently set to 'Button'. At the bottom of the dialog, there are two buttons: a green 'OK' button and a red 'Cancel' button.

After building the form, review the additional information below to ensure the information is correct.

- **Additional Form HTML** – Add html to enhance the form but only if familiar with html code.
- **Destination Email Address** – Enter the email address where the form will be sent. If more than one email address is required, separate each with a comma.

✿ If you want the email address to pull from [System Profile > Email for website forms](#), check the box.

- **Subject of Email** – The subject line of the email.
- **Top of Email message body** – Add a brief explanation of the email to ensure recipients understand the submitted information.
- **Thank-You Message** – The automatic reply can thank online visitors who submit forms for taking the time to complete.

When complete, select the 'Save' button.

Adding Attachments:

Enter the following code within the Thank-You Message to allow online visitors to attach .jpeg or PDF files with the form submission.

<a_href="mailto:whatever@youreemail.com">Email Us

When online visitors submit a form, they will then be asked if there are any attachments. If yes, their email programs will open where they can attach the file.

[<< Frequently Asked Questions Page](#)

[News/Newsletter Article Page >>](#)

News/Newsletter Article Page

The Newsletter Article module creates a news page. The module includes a mailing list component with the ability to send newsletters via email. Information such as announcements and upcoming events with photos and links can be easily posted or emailed.

If you require a new page, refer to [Create a New Page](#).

Select the 'Edit Content' button.



- New – Create a new article.
- Edit – Edit an existing article.
- Delete – Delete an existing article
- Edit Header – Edit the top portion (header) of the page.
- Edit Footer – Edit the bottom portion (footer) of the page.
- Edit Settings – Manage the settings for the page.
- Send Newsletter – Manage the email component of the module.
- Test the Page – Preview your page when changes made.

Edit Settings

News Settings

Layout Style: Articles with title, date and author ?

Maximum articles displayed: 0 ?

Allow older articles: No ?

Show top articles: No ?

Maximum top articles: 0 ?

Save

- Layout Style – Choose the layout for this article.
- Maximum articles displayed – Enter the maximum number of visible articles.
- Allow older articles – Select whether older articles should be visible.
- Show top articles – Select whether top articles should be visible.
- Maximum top articles – Enter the maximum number of top articles to display.

Add an Article

Select the 'New' button.

Article Options

Visible: Yes ?

Top Article: No ?

Title: ?

Author: ?

Date/Time: M/D/Y H:M July / 9 / 2008 at 8 : 54 am ?

Save

- Visible – Choose whether the article should be visible or hidden.
- Top Article – Select whether or not this is the top article.
- Title – Enter the title of this article.
- Author – Enter the author of this article.
- Date / Time – Select the date and time.

Send Newsletter



- Edit Mailing List – Create and edit the newsletter subscription list.
- Edit Newsletter Header – Edit the top portion (header) of the newsletter. The same header will create consistency.
- Newsletter Details and Articles – Choose the title / subject line of the newsletter, which articles will be included, and what email address will be used to send the newsletter.
- Newsletter Footer – Edit the bottom portion (footer) of the newsletter. The same footer (ex. contact information) will create consistency.
- Printable Preview – View how the newsletter would appear when printed.
- Preview and Send Newsletter – Enter your subject line, the sender's name and email address. Check which newsletter(s) will be sent.

A screenshot of a web application window titled "Choose Details for Newsletter". The form contains the following fields and elements:

- "Newsletter Subject Line:" followed by a text input field.
- "Newsletter From Name:" followed by a text input field containing "Johnny Young".
- "Newsletter From Email Address:" followed by a text input field.
- A paragraph of text: "Choose the articles you wish to include in the newsletter, articles with the 'select' column checked will be sent."
- A table with the following structure:

Select	Title	Author	Date
<input type="checkbox"/>	Test	Stephanie	July 9, 2008, 8:54 am
- A "Save" button at the bottom.

[<< Submission/Email Form Page](#)

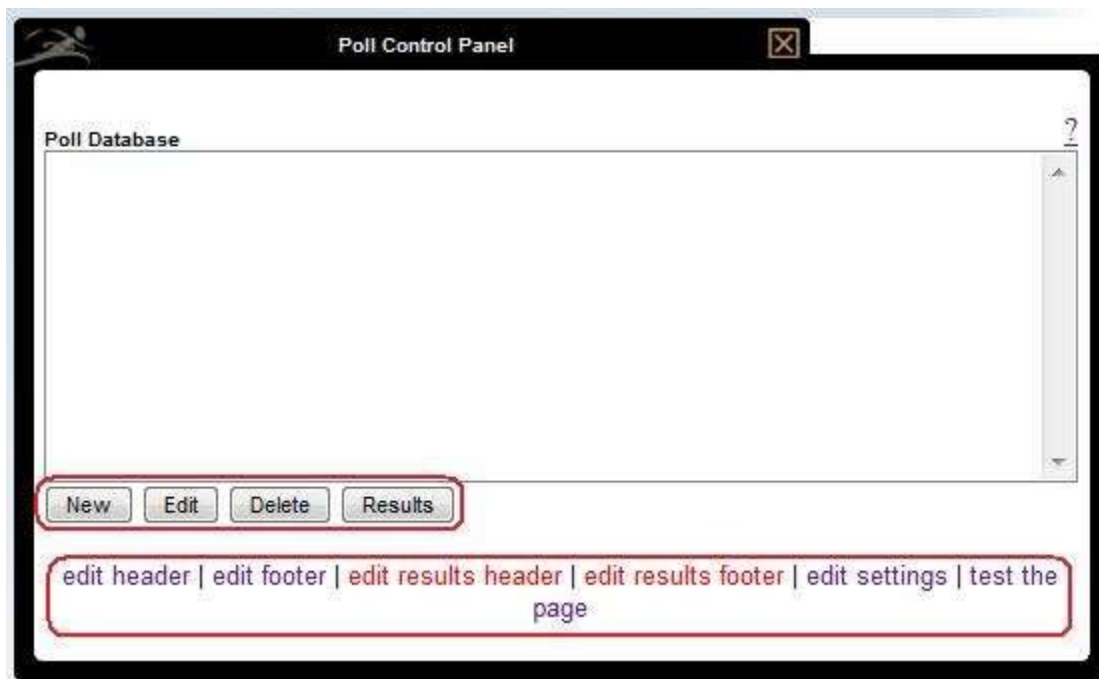
[Open a Poll >>](#)

Open a Poll

The Poll module creates a survey for online visitors and a results page.

If you require a new page, refer to [Create a New Page](#).

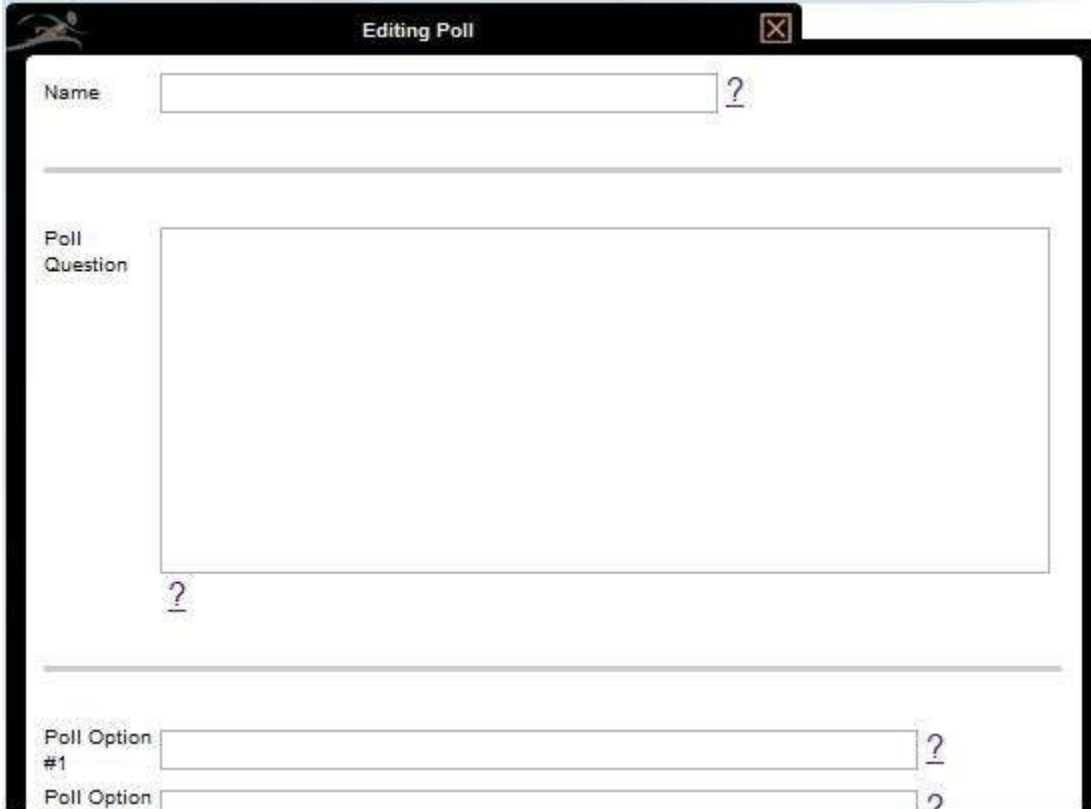
Select the 'Edit Content' button.



- New – Add a new poll.
- Edit – Edit an existing poll.
- Delete – Delete an existing poll.
- Results – Displays results for a specific poll.
- Edit Header – Edit the top portion (header) of the page.
- Edit Footer – Edit the bottom portion (footer) of the page.
- Edit Results Header – Edit the top portion (header) of the results page.
- Edit Results Footer – Edit the bottom portion (footer) of the results page.
- Edit Settings – Manage the settings of the polls.
- Test the page – Preview the page.

Add a Poll

Select the 'New' button.



The screenshot shows a web application window titled "Editing Poll". It contains the following fields:

- Name:** A text input field with a question mark icon to its right.
- Poll Question:** A large text area with a question mark icon to its bottom-left.
- Poll Option #1:** A text input field with a question mark icon to its right.
- Poll Option:** A second text input field with a question mark icon to its right.

- Name – Enter the name of the poll.
- Poll Question – Enter the question for the poll.
- Enter the Poll Options.

Save changes.

[<< News/Newsletter Article Page](#)

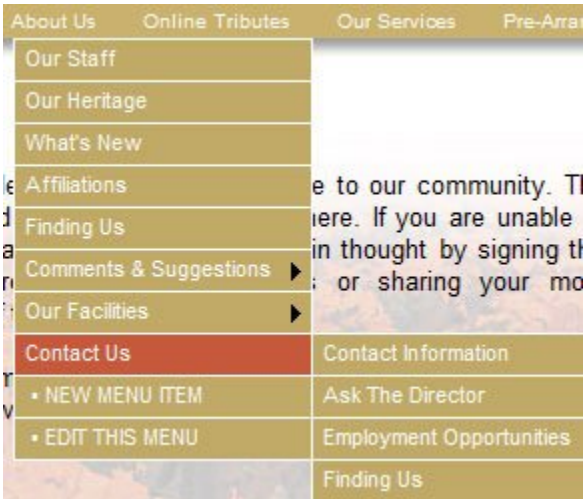
[Child Browser Module >>](#)

Child Browser Module

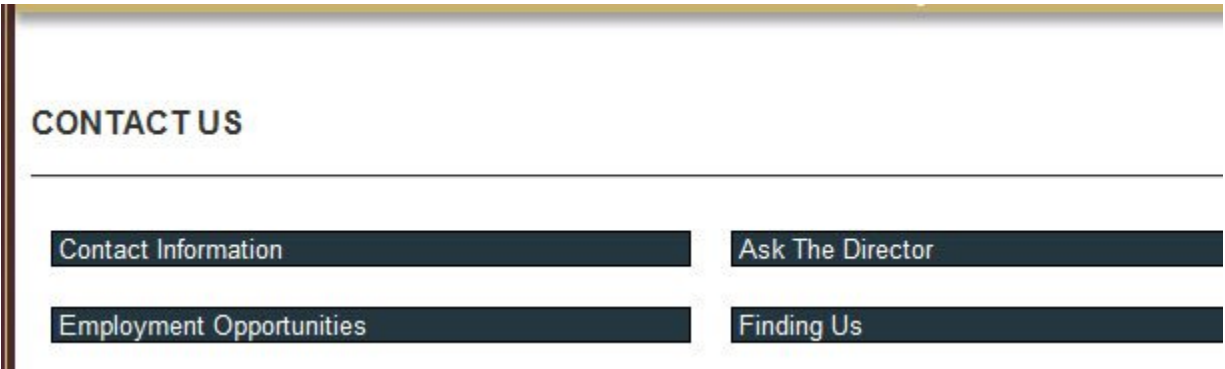
A Child Browser module automatically creates a page that lists all of the secondary or ‘child’ pages of the current ‘parent’ page.

* FrontRunner has created a new and improved way of displaying child pages. For more information, please [contact your Success Coach](#).

Using the example below, you will notice when Contact Us (known as the parent page) is hovered over there are three pages (known as the child pages) within this section.



When the Contact Us page is clicked on, the page loads the sub-pages. This is because the Contact Us page is set as a Child Browser Module.



How to Create a Page Using a Child Browser Module

1. From your left navigation, click Manage > Site Map. You want to either create new pages for your parent/child pages, or use existing pages you have to create your parent/child pages.
2. There are two options:
 - a) [Create a New Page](#) to a section of your site map. When a new page is created, click the arrow beside it to add more page (sub-pages) underneath/within that section.
 - b) Reorganize an Existing Page: click the arrow beside a page you want as the parent page. Click the arrow beside and either “move existing page(s) into that section or “Add” new pages.
3. Click Save.
4. From the left navigation, click Edit.
5. Navigate to your parent page.
6. If you are not seeing your sub-pages on this page, you will need to change the page type to a Child Browser Module.
7. Change your page to a child browser module: if you have content on your page, you will want to highlight it all, right-click, and copy.
 - a) Navigate to Edit Details and change the Page Action section to Child Browser Module.
 - b) A pop-up will appear, click OK.
 - c) Save.
 - d) You will now see the sub-pages on this page.
 - e) If you copied content in the initial step, then click Edit Header, click inside the editor, hit Ctrl-V to paste. Save when done.
8. The Edit Header and Edit Footer are optional settings that will allow you to add content to the top or bottom portions of your page.

[<< Open a Poll](#)

[Contest Module >>](#)

Contest Module

The Contest module creates online contests and features random selection of entries with future exclusions and downloadable spreadsheets. It can also be used as a way to offer online event registration.

If you require a new page, refer to [Create a New Page](#).

Select the 'Edit Content' button to create a submission form and retrieve data from the entries received.



Edit Form — This is the form that will be filled out and submitted by online visitors. The required fields for this form are:

- First Name
- Last Name
- Email
- Birth Day / Birth Month / Birth Year
- Additional form fields can be added. For more information, please refer to the [Submission/Email Form Page](#).

Edit Submission Page – Create a message that will display once online visitors submit the form.

Edit Settings — Enter the email address where all submissions are sent and set whether visitors can submit more than once.

Test the page — Preview the page.

Once the contest or event is over, there are several options:

- **Select Random** — Pick a contest winner randomly.
- **Get Spreadsheet** — Download a spreadsheet containing information from all entries.
- **Get Text** — Download a text file containing information from all entries.
- **Clear Database** — Clear all entries.
- **New** – Add a new entry.
- **Edit** – Edit an existing entry.
- **Delete** – Delete an existing entry.

[<< Child Browser Module](#)

[Linking to Another Website >>](#)

Linking to Another Website

The External Web Page module creates a link to the external website of another business, affiliate, or organization. The link opens a new browser window so visitors never leave your website.

If you require a new page, refer to [Create a New Page](#).

Select the 'Edit Details' button.

Refer to the section called **Optional Settings**.

In the “Where should the page be opened?” field, select the ‘Open in a new web browser’ option.



Enter the website address (URL) and include the ‘http://’ before the ‘www’.



When complete, select the 'Save' button.

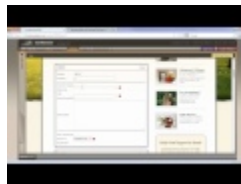
[<< Contest Module](#)

[Create a Quote Builder >>](#)

Create a Quote Builder

The Quote Builder module generates a professional price outline for any product or service offered. The module automatically calculates the total for online visitors.

* FrontRunner has created a [new and improved](#) app for creating a quote builder. For more information, please [contact your Success Coach](#).



If you require a new page, refer to [Create a New Page](#).

Select the 'Edit Content' button.



- New – Add a new quote.
- Edit – Edit an existing quote.
- Delete – Delete an existing quote.

- Position – Change the order on the page.

Select the 'New' button.

The screenshot shows a window titled "Options" with a close button in the top right corner. The window contains the following fields:

- Visible:** A dropdown menu currently showing "Yes" and a help icon (?) to its right.
- Position:** A text input field containing the number "1" and a help icon (?) to its right.
- Section Header (optional):** A text input field with a help icon (?) to its right.
- Title (recommended):** A text input field with a help icon (?) to its right.
- Description:** A large, empty text area with a help icon (?) to its right.
- How should the items be displayed?:** A dropdown menu currently showing "Dropdown box" and a help icon (?) to its right.

Section Header – separate various sections of the quote builder into different categories.

Title – Enter the name of the product or service. ex. Professional Fees, Service Level, Color Sections, etc.

Description – Describe the type of services or products.

How should the items be displayed? – Choose how online visitors can make selections.

- Drop Down Box – Users can view the available selections in a drop down menu and choose a single option.
- Radio Buttons – Users can only select one option from the list of available choices. When they choose a different option, the previous choice is automatically de-selected.
- Check Boxes – Users “check” all applicable choices. Check boxes are useful when you want users to be able to choose more than one option.

Build the quote by adding products and/or services.

The image shows two overlapping windows for adding items. The top window is titled 'Item #1' and the bottom window is titled 'Item #2'. Both windows have a close button (X) in the top right corner. Each window contains the following fields:

- Name:** A text input field with a help icon (?) to its right.
- Position in list:** A dropdown menu with '1' selected for Item #1 and '2' selected for Item #2. It has a help icon (?) to its right.
- Price:** A text input field with a help icon (?) to its right.
- Status:** A dropdown menu with 'Not selected' selected for Item #1. It has a help icon (?) to its right. Next to it is another dropdown menu labeled 'Don't allow user to enter a quantity' with a help icon (?) to its right.
- Description (optional):** A large text area with a help icon (?) to its right.
- Considerations (optional):** A large text area with a help icon (?) to its right.

Name – Enter the name of the item as it should appear on the page.

Position – designate the order of each item in the list. (Note: Also see Positions below)

Price – Enter the price of the item. Do not insert the dollar (\$) sign as the module adds it automatically.

Status – Select the “default status” of the item.

- **Selected** – Designate an item to be visible as default when the page opens. Users can select other options.
- **Not Selected** – This item is not selected as default.
- **Mandatory** – Items are already selected and cannot be de-selected or changed.
- **Description (optional)**
- **Considerations (optional)**

Positions – This is an easy-to-use feature to help change the order of the items in the Quote Builder. Select the Positions button in the Control Panel and click an item to move up or down.

[<< Linking to Another Website](#)

[Site Map Module >>](#)

Site Map Module

A Site Map provides an overview of the website and links to all pages. A search function is included.

If you require a new page, refer to [Create a New Page](#).

Select the 'Edit Content' button.



* Edit Header – Edit the top portion (header) of the page.

- Edit Footer – Edit the bottom portion (footer) of the page.
- Test the sitemap – Preview the page.

[<< Create a Quote Builder](#)

[Create a Virtual Tour >>](#)

Create a Virtual Tour

FrontRunner is committed to creating a stunning video that represents both the quality of your facility and the exceptional services you provide for your community.

The Facility Video will include:

- Up to 40 photos of your facility
- Appropriate music
- Text throughout the video that can be provided by your firm or created by FrontRunner
- One request for changes
- Video is provided in MP4 or ISO format
- One web-ready quality copy plus one high definition copy provided



If you are interested in having a virtual tour done for your funeral home, please [contact your FrontRunner Success Coach](#).

To begin in the creation process, your Success Coach will send you a Facility Tour App Document which will need to be completed by you.

Provide up to 40 photos that are at its best quality. Large images will shrink but if an image is too small, it will be added to the video that way.

Sending files is different in each email program. Normally, you can send up to 10 MB using a zipped folder. To zip a folder, right click on it and click Send to > Compressed (zipped) Folder. If the file size is too big to send, contact your project manager for other options.

Outline the specific order of the photos and specify the file names.

Include any text/verbiage to be included in the video and specify where (file name).

Indicate where (which web page) the video should be posted.

[<< Site Map Module](#)

[Add Live Chat >>](#)

Add Live Chat

There are many programs out there to provide you with a Live Chat service to add to your website.

There is one we recommend, and have a few clients using this feature already, called Comm100. For more information, please visit the [Comm100](#) website. You can customize a button of your choice. Once created, send us the code and we can implement it into your website for you.

If you are looking for a free option or different price, try Google searching for a live chat program.


[<< Create a Virtual Tour](#)

[Wireframe >>](#)

Wireframe

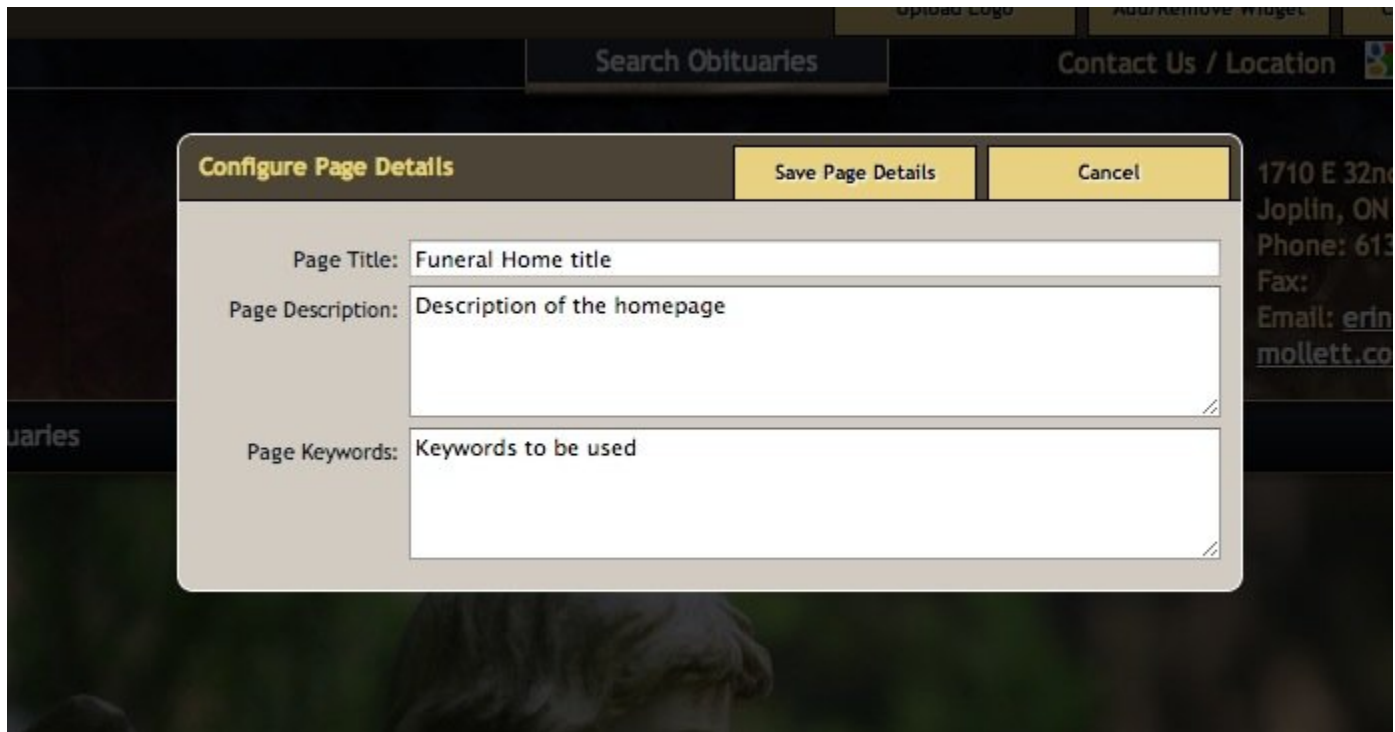
The following describes all possible widgets installed on a wireframe website system. The home page settings are listed first and the child browser page settings can be found at the bottom of this page.



The key to editing content on the home page is to locate  in the area that requires changes. If there are widgets listed below that you would like to include on your home page, please [contact your Success Coach](#).

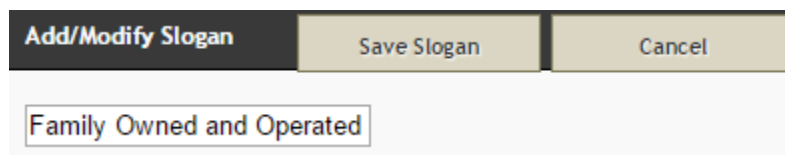
Edit Details

Click on the 'Edit Details' button at top right of the home page to enter the the page title, search description, and keywords. This feature will help with your home page's search engine optimization or SEO. For more information and to find some helpful tips about SEO, [visit the Search Engine Optimization page](#).



Slogan

To change the wording of the slogan, above the main menu, click on 'Edit' at top left of the field. Once complete, click on 'Save Slogan'.



Slider

To add or delete images used for the slider, click on the 'Edit' at top left of the slideshow. All images currently contained within the slider will be displayed.

- Click on the red X to delete an image
- Click on the pencil icon to edit an image.

* The same window will appear when an existing image is edited or if 'Add Slide' is chosen.

Configure Slider: To replace an existing image, click on the Browse button to locate the file on your computer. Each image can also be linked to another page on your website or to an external website.

- To create a link to a page on your website, type in the page-to-be-linked's file name (Edit Details > Optional Settings > What should be web page's file name?).
- To link to an external website, be sure to add the http:// before the www.

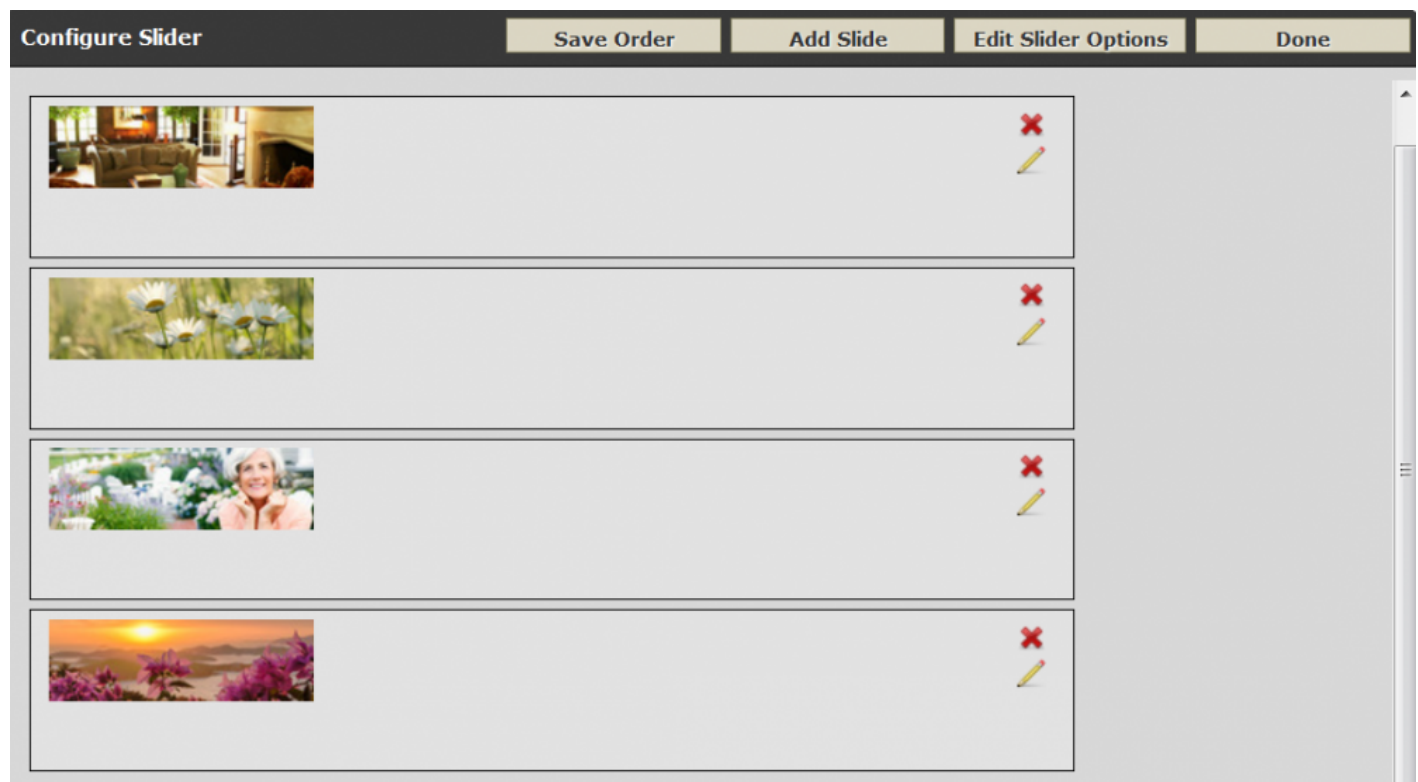
If creating a link, select how the linked page should open: Current Window or New Window.

Once changes have been made, click on Save at top right.

Change Order of Slider Images: Place cursor over the image to be moved and drag and drop it to the new position. When any changes to the order of the images is made, click on 'Save Order' at the top of the window.

Edit Slider Options: By clicking on the dropdowns, choose either a Fade or Slide transition; choose the Slide Duration time. To show the slide, check the 'Show Slide' box. Once any changes are made, click on Save.

When all changes to the slider have been completed, click on Done at the top right of the window.

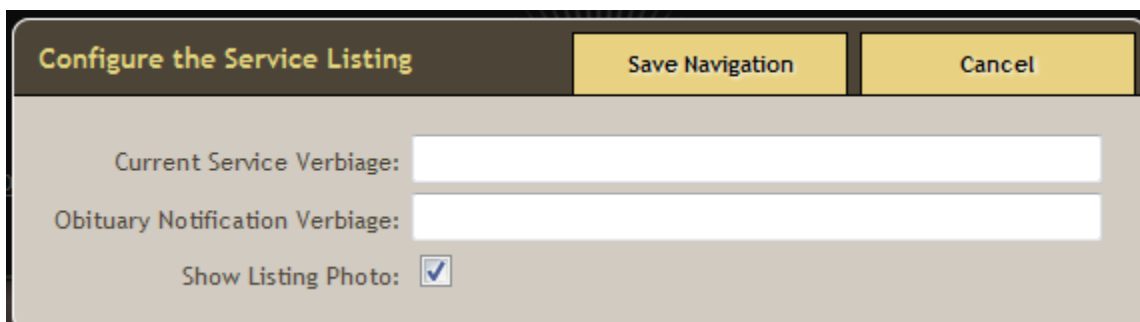


Navigation

To modify the main menu settings, click on the 'Edit' button at top left of the menu. You have the ability to modify the action by choosing 'No Dropdown', 'Click' or 'Hover'. You can also enable flowers and obituary links on the main menu by checking the applicable boxes. To change the name 'Obituaries' to something else, type the new name in the 'Obituary Label' field. Click on 'Save Navigation'.

Service Listings

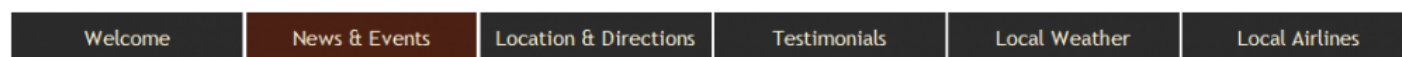
The wording for the service listings section can be modified / personalized. Click on the 'Edit' button at top left of the service area. To change the wording from 'Current Services...', enter new text in the 'Current Service Verbiage' field. to change the wording from 'Obituary Notifications', enter new text in the 'Obituary Notification Verbiage' field. There is also an option to show a photo for each current service; check the box beside 'Show Listing Photo'. Click on 'Save Navigation'.



The screenshot shows a dialog box titled "Configure the Service Listing". At the top, there are three buttons: "Configure the Service Listing" (highlighted in yellow), "Save Navigation", and "Cancel". Below the buttons, there are two text input fields. The first is labeled "Current Service Verbiage:" and the second is labeled "Obituary Notification Verbiage:". Below these fields is a checkbox labeled "Show Listing Photo:" which is checked.

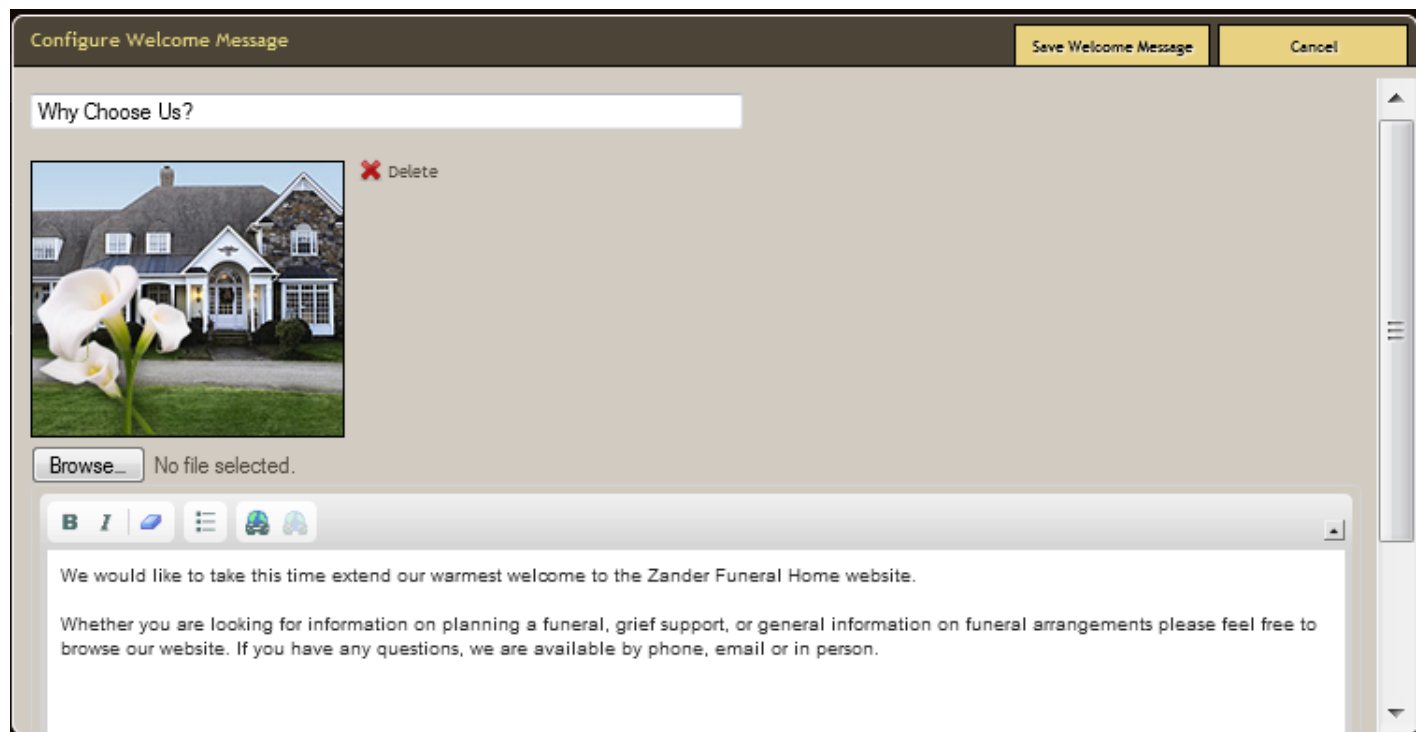
Welcome Message Menu

Click on any of the menu items and then the 'Edit' button below the Welcome button to change the content.



Welcome

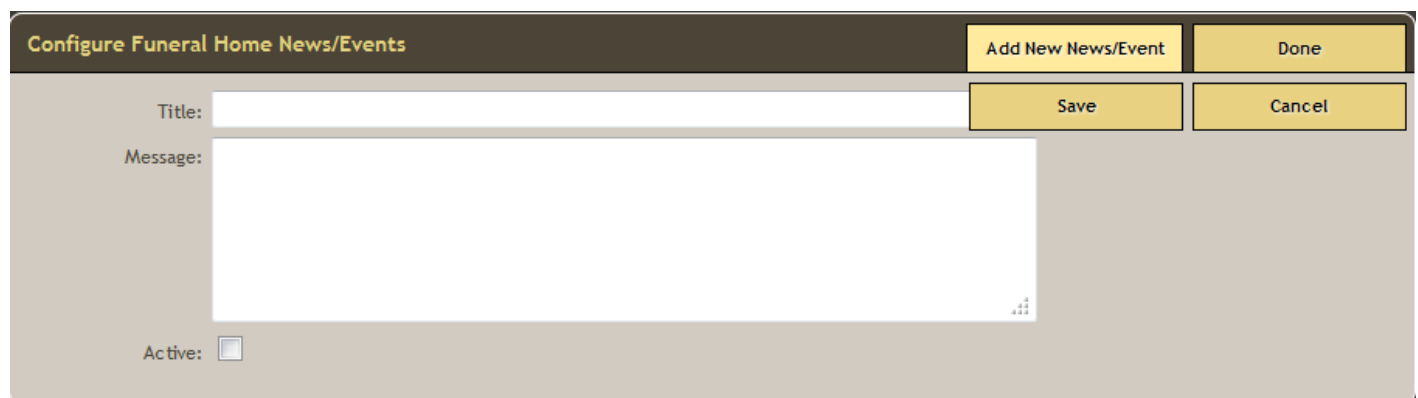
Basic editing tools are provided to change the home page welcome message. The top field contains the wording for the welcome title. (ex. below 'Why Choose Us?'). To change the image, click on Browse and locate the file on our computer. You will need to drag your cursor to highlight that focal point in the photo you want displayed. In the text field, type directly or paste content from another source. The formatting options available include: bold, italicize, erase formatting, bullets, and inserting a hyperlink.



The 'Configure Welcome Message' dialog box features a title bar with the text 'Configure Welcome Message' and two buttons: 'Save Welcome Message' and 'Cancel'. Below the title bar is a text input field containing 'Why Choose Us?'. To the left of the main content area is a preview of a website header image showing a house and calla lilies. To the right of the image is a red 'X' icon and the text 'Delete'. Below the image is a 'Browse...' button and the text 'No file selected.'. At the bottom of the dialog is a rich text editor with a toolbar containing icons for bold, italic, link, list, and image. The text area of the editor contains the following text: 'We would like to take this time extend our warmest welcome to the Zander Funeral Home website. Whether you are looking for information on planning a funeral, grief support, or general information on funeral arrangements please feel free to browse our website. If you have any questions, we are available by phone, email or in person.'

News & Events

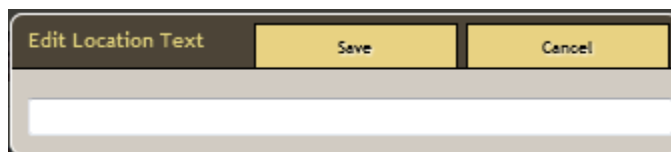
Click on the 'Edit' button at top left of window and then click on 'Add New News/Event'. Add a 'Title' and enter the 'Message' for particular news or upcoming event. Check the 'Active' button to ensure the listing is visible. (Once a listing is created and saved, the options to edit or delete are available.) Click on 'Save' and then 'Done'.



The 'Configure Funeral Home News/Events' dialog box has a title bar with 'Configure Funeral Home News/Events' and two buttons: 'Add New News/Event' and 'Done'. The main area contains a 'Title:' label followed by a text input field. Below that is a 'Message:' label followed by a large text area. At the bottom left is an 'Active:' label with an unchecked checkbox. On the right side, there are two buttons: 'Save' and 'Cancel'.

Locations & Directions

To change any of the contact information, navigate to your [System Profile](#) where the information is collected. To edit the introductory sentence only, click on 'Edit' at top left of window. If left blank, the default sentence will appear.

A small dialog box titled "Edit Location Text" with a dark header bar. Below the header are three buttons: "Edit Location Text" (in the header), "Save", and "Cancel". Below the buttons is a large, empty white text area for editing.

Testimonials

Click on 'Edit' at top left of window to open the Testimonials editing option. Click on 'Add New Testimonial' to enter the name and message. Check the 'Published' button at bottom to make testimonial visible. Click on the 'Save' button.

A window titled "Configure Funeral Home Testimonials" with a dark header bar. The header bar contains the title and two buttons: "Add New Testimonial" and "Done". Below the header, there are two rows of input fields. The first row has a label "Name:" followed by a text input field. The second row has a label "Message:" followed by a larger text area. To the right of these fields are two buttons: "Save" and "Cancel". At the bottom left, there is a label "Published:" followed by a checkbox. The window has a standard scrollbar on the right side.

Local Weather

This widget can not be edited. It pulls location information from your [System Profile](#).





Local Airlines

This widget will provide helpful links to website visitors who require flight information. Click on 'Edit' at top left of window and then check all airlines that apply. Click on 'Save Airlines'.

Configure Airlines			Save Airlines	Cancel
<input type="checkbox"/> Air Canada	<input type="checkbox"/> Air Canada Jazz	<input type="checkbox"/> Air India	<input type="checkbox"/> Air Jamaica	
<input type="checkbox"/> Air Tran	<input type="checkbox"/> Airberlin	<input type="checkbox"/> Alaska Airlines	<input type="checkbox"/> Alitalia	
<input type="checkbox"/> All Nippon Airways	<input type="checkbox"/> Allegiant Air	<input type="checkbox"/> American Airlines	<input type="checkbox"/> Bearskin Airlines	
<input type="checkbox"/> British Airways	<input type="checkbox"/> Calm Air	<input type="checkbox"/> CanJet	<input type="checkbox"/> Caribbean Airlines	
<input type="checkbox"/> Central Mountain Air	<input type="checkbox"/> China Southern Airlines	<input type="checkbox"/> Continental Airlines	<input type="checkbox"/> Copa Airlines	
<input type="checkbox"/> Delta Airways	<input type="checkbox"/> Delta Connection	<input type="checkbox"/> First Air	<input type="checkbox"/> Frontier Airlines	
<input type="checkbox"/> Hawaiian Airlines	<input type="checkbox"/> Iceland Express	<input type="checkbox"/> Japan Airlines	<input type="checkbox"/> Jet Airways	
<input type="checkbox"/> JetBlue	<input type="checkbox"/> Keystone Air Service Ltd.	<input type="checkbox"/> Kivalliq Air	<input type="checkbox"/> KLM	
<input type="checkbox"/> KLM Royal Dutch Airlines	<input type="checkbox"/> Korean Air	<input type="checkbox"/> Lan	<input type="checkbox"/> Lufthansa	
<input type="checkbox"/> Mesa Airlines	<input type="checkbox"/> Northwest Airlines	<input type="checkbox"/> Northwestern Airlines	<input type="checkbox"/> Perimeter Airlines	
<input type="checkbox"/> South African	<input type="checkbox"/> South West Airlines	<input type="checkbox"/> Spirit Airlines	<input type="checkbox"/> Sun Country	

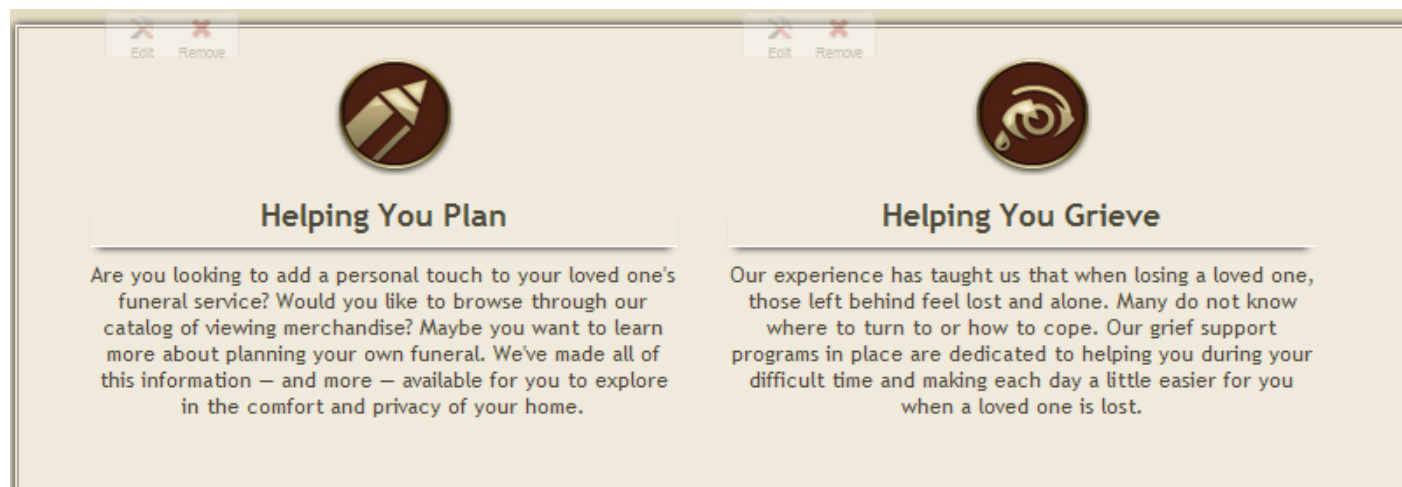
Grief Resources

The '365 Days of Healing' and '52 Weeks of Support' widgets can't be edited. To remove either one, click on the 'Remove' option at top left of window. Once removed, there will be no way for you to bring it back. Please [contact your Success Coach](#) if you have removed (for billing purposes) or to add back into your website.

	
	
365 Days of Healing	52 Weeks of Support
Grieving doesn't always end with the funeral: subscribe to our daily grief support email, designed to help you a little bit every day, by filling out this simple form.	It's hard to know what to say when your loved ones experience loss. Our weekly newsletter provides insights, quotes and messages on how to provide help during the first year.
<input type="text"/> Full Name <input type="text"/> Email Address <input type="button" value="Sign Up"/> <input type="button" value="Clear"/>	<input type="text"/> Full Name <input type="text"/> Email Address <input type="button" value="Sign Up"/> <input type="button" value="Clear"/>

Helping You Plan & Helping You Grieve

Both fields can be customized with new content, however the titles will remain the same.



This is a dialog box titled 'Adding Custom Helping Plan Text'. It features a large white text area for input, a 'Save' button, and a 'Cancel' button. A small 'a a a' icon is visible in the bottom right corner of the text area.

This is a dialog box titled 'Adding Custom Helping Grieve Text'. It features a large white text area for input, a 'Save' button, and a 'Cancel' button. A small 'a a a' icon is visible in the bottom right corner of the text area.

Calls to Action

There are four distinct calls to action available. Order Flowers, Immediate Need, Pre-Arrangement and Obituaries & Tributes. To change the order or add/delete any of the items, click on 'Edit' at top left of window. Drag and drop the items from lower bar to the top section and / or to rearrange the order. Click on 'Save Calls to Action'. To create a custom call to action, click on the 'Create Custom CTA' at bottom right of window. Fill in all fields and then click on 'Apply' and then 'Save Calls to Action'.

Configure Calls to Action Save Calls to Action Cancel

Immediate Need
If you have immediate need of our services, we're available for you 24 hours a day.

Pre-Arrangement
A gift to your family, sparing them hard decisions at an emotional time.

Obituaries & Tributes
It is not always possible to pay respects in person, so we hope that this small token will help.

Order Flowers
Offer a gift of comfort and beauty to a family suffering from loss.

Create Custom CTA

Social Media

To add links to social media, click on the 'Edit' button at top left of window and then drag and drop items from the lower to the top bar. A 'pencil' icon will appear beside each logo added. Click the pencil to add the URL to your social media account. Click 'Apply'. Click on 'Save Social Links'.

Configure Social Links Save Social Links Cancel

facebook

Blogger Google+ LinkedIn RSS twitter YouTube

Associations

To add all applicable associations, click on 'Edit' at top left of menu. Drag and drop association logos from lower to top bar. (Please [notify your Success Coach](#) if there are additional affiliations to be included.) Click on 'Save Associations'.




Child Browser Pages

All child browser pages within a wireframe website provide easy-to-edit options for each section. The child pages for various sections are listed within their own windows. The image, title and content can all be changed if necessary. Click on the 'Edit' button located at the top left of the browser window.





The child browser page can be changed (example below – Our Difference) and the text can be edited. To replace the image, browse to the file on our computer and upload. Drag and drop the the highlighted area to the part of the image that will be visible in the window. Click on ‘Save Image’ and then ‘Save Child Browser Item Message’.

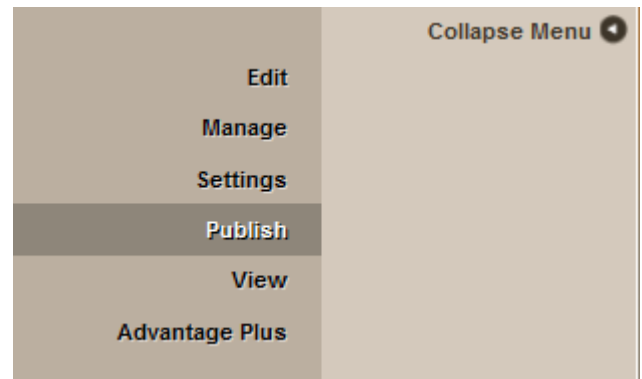
Configure Child Browser Item		Save Child Browser Item Message	Cancel
	<div>Our Difference</div> <div><input type="button" value="Browse..."/> No file selected.</div> <div>Not many folks have thought about the qualities in a preferred funeral home. Yet, when you read of who we are, and how much we care; you'll know exactly what you should expect.</div>		

[<< Add Live Chat](#)[Publish Website >>](#)

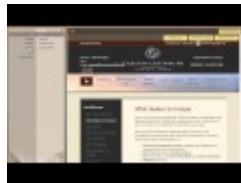
Publish Website

Navigate to Website > Publish.

In order for the changes made to the website to be visible to online visitors, the site must be published.



! Note: If your website is not live, publishing changes will NOT push your website live.



Select Publish at top right and wait for your changes to be saved. The Publish Status section will display the last publish date and the number of pages on your website. The publishing process goes through every page to check for updates so this can take a few minutes.

Publish Status	
Last Publish Date:	January 11, 2015, 3:32 pm
Number of Pages to Publish:	135
Click the publish tool on the right to publish your site. All changes will be committed to the web.	

If you do not see the changes made on the live website:

- Make sure the page changes were saved.
- Make sure the page is not hidden. If it is hidden, the page name will be surrounded by brackets in the navigation menu within administration.
- Make sure the parent page is not hidden (the page clicked on to get to your page). If it is hidden, the page name will be surrounded by brackets in the navigation menu within administration.
- Refresh the page by clicking on the F5 keyboard button.

[<< Wireframe](#)

[FAQs on Website >>](#)

FAQs on Website

Below are a list of common questions regarding the website. If you are still unable to find a solution to any problem that you are experiencing, please contact support@frontrunnerpro.com.

Question: The changes I made to the website aren't showing up. What did I do wrong?

Answer: If you do not see the changes made on the live website:

- Make sure the page changes were saved.
- Make sure the page is not hidden. If it is hidden, the page name will be surrounded by brackets in the navigation menu within administration.
- Make sure the parent page is not hidden (the page clicked on to get to your page). If it is hidden, the page name will be surrounded by brackets in the navigation menu within administration.
- Refresh the page by clicking on the F5 keyboard button.

Question: Why is my website down? Help!

Answer: If your website (www.yourcompanyname.com) is down, it might be a domain name issue. Contact your domain name provider to verify whether the domain name has expired.

p(banner tip). Your domain name provider may not necessarily be your website provider. To find out your domain name provider, go to www.networksolutions.com/whois and enter your domain name.

Question: Why am I not receiving any emails through the forms on my website?

Answer: Please make sure the emails have not been directed to your spam or junk folders. If not, it's important to check whether the email address information is correct:

1. Login to your system and navigate to System Settings > System Profile.
2. Scroll down to the field called "Email for Website Forms".
3. Correct the email address.

If correct:

1. Navigate to the Website tab and a website form page.
2. Click on the 'Edit Content' button.

3. Scroll down to 'Destination Email Address' to check if email address listed is correct and, if more than one, they are separated with a comma OR the "Use Email for Website Forms from Profile" box is checked.
4. Click 'Save'.
5. Don't forget to Publish your website.

If everything has been set up properly, try using a different email address. Send yourself a test form to confirm.

Question: Why is the form on my website not working?

Answer: Confirm that your form page is set up to send forms. Edit Details > Page Action. The radio button for Open an Email Form must be selected.

If it is:

Verify the email being used for the form is correct. Click close at the top right > click Edit Content. Check the destination email address.

If it is not:

1. Click close at the top right > Edit Content.
2. Click the Advanced button in the menu and the Source icon.
3. Click anywhere on the page (html code) then Ctrl-A to select all the code.
4. Click Ctrl-X to delete the text.
5. Click close at the top right > Edit Details.
6. Choose the Open an Email Form module then Save.
7. Click Edit Content.
8. Click the Advanced button in the menu and the Source icon.
9. Delete any code.
10. Click Ctrl-V.
11. Save.

Question: Why did the login screen appear when I saved my work on a web page?

Answer: The login screen will appear if no work was saved on your computer for longer than 3 hours. Please save your changes frequently and save your work before leaving your computer for any length of time.

Question: What are QuickSearch report emails?

Answer: Whenever a visitor searches for keywords on your website, you will receive an email letting you know the results of the search. If any results were found, the email lists the number and top results. This information will help build your website and better assist online visitors. For further information, [click here](#).

Question: Why are hidden pages still appearing on my live website?

Answer: Navigate to Website > Manage > Site Map. Confirm all pages that need to be hidden are in fact hidden. Click the 'Hide' button beside the page name.

Even if primary page ('parent') is hidden, all of the secondary ('child') pages need to be marked as hidden as well. The page will not be visible in the menu but visitors searching for particular keywords may be able to locate the page in the search results.

Question: Why is a current record not appearing on my website's home page?

Answer: The home page only lists a certain number of records. If, for example, there are 12 current services yet the home page settings only allow 8 records, there will be 4 records that don't appear. Online visitors can follow the link to view Current Services to see all current records.

You can also change the number of visible records on your home page. Go to the Current Services page and click Edit Page Details > Edit Content. You will see a drop down for "Number of records per page". Choose a number and then click on Save.

Question: What does an anchor icon do?

Answer: The WYSIWYG Editor allows the user to link to different pages (hyperlinks) or different parts of the same page (anchors). If you see an anchor, a link exists to direct users to another section of the same page.

Question: Why does my full website load on my iPhone even though I've checked the mobile website to appear?

Answer: This is a known issue with the Safari browser on the iPhone. If you've ever viewed the full website on your phone, Safari would have cached it and will continue to display it until the history, cookies and data are cleared.

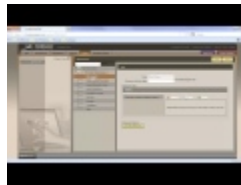
1. On your iPhone, go to Settings > Safari > Clear History. A confirmation message will appear.
2. Choose 'Clear History' or 'Cancel' to continue.
3. Go to Settings > Safari > Clear Cookies and Data. A confirmation message will appear.
4. Choose 'Clear Cookies and Data' or 'Cancel' to continue.

Once the cache is cleared, you should be able to view the mobile website.

Create / Edit Your Virtual Showroom

The Virtual Showroom allows you to showcase products and services. It can be used with a touch-screen monitor from any location in your funeral home (such as foyer, arrangement office, and selection room) or from a families home. It can be fully customized by your administrators.

If you would like the Virtual Showroom activated in your system, [contact your Success Coach](#) for more information.



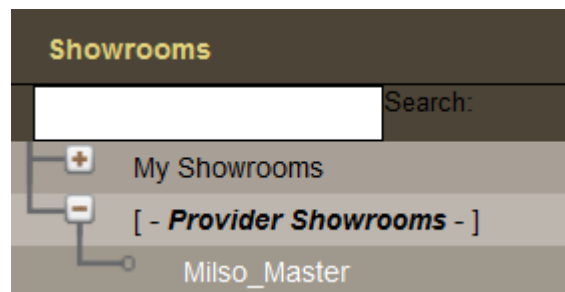
To access any of the showrooms, navigate to the Kiosk tab in the top menu of your FrontRunner system.

- [Create a Virtual Showroom](#)
- [Edit a Virtual Showroom](#)
- [Launch a Virtual Showroom](#)

Create a Virtual Showroom

Navigate to the Kiosk tab.

If you are a Canadian client of FrontRunner Professional or wish to build your own showroom from scratch, click 'Add' at the top right. If you are a Matthews client, there is a pre-built and editable showroom available.



There are 2 categories on the left:

- My Showrooms – These are the showrooms created by you.
- Provider Showrooms – These are Matthews pre-built showrooms.

Use the + to expand the Provider Showrooms category and select the Milso Master showroom. The showroom will load on the right. Select the Copy This Showroom button.






A message will appear “Are you sure?” Click yes. The copied showroom will load under My Showrooms with the date it was added. Click on your showroom.

Replace the name – ex: ‘Funeral Home Name’ Showroom. Enter a keyword related to this showroom to set up a new Showroom Domain. Ex. showroom will produce the domain:

“showroom.yourcompanyname.frontrunnerpro.com”, which can be opened on any computer.




Kiosk Settings	
Name:	<input type="text" value="Test Showroom"/>
Showroom Domain:	<input type="text" value="funeralservices"/> daveylinklater.frontrunnerpro.com <i>Creating a new subdomain or changing your old subdomain for your Kiosk results in the domain needing to be mapped. You will receive an email when your domain has been mapped.</i>
Showroom Security:	<input type="text" value="Requires Login"/>

Users	
There are currently no items in the list.	 Delete  Add  Save
<div>Please select an item from the list or click "Add" to add a new item.</div>	

Options		
<input type="button" value="Edit This Showroom"/>	<input type="button" value="Copy This Showroom"/>	<input type="button" value="Launch This Showroom"/>

Users

Users

 Delete  Add  Save

There are currently no items in the list.

User Name:

New Password:

First Name:

Last Name:

Email Address:

Select the + to add a User. Create user name, password, first & last names, and an email address. Click on the green save icon.

When all Users are added, click on the Save button at top right.

[<< Create / Edit Your Virtual Showroom](#)

[Edit a Virtual Showroom >>](#)

Edit a Virtual Showroom

Editing your virtual showroom can consist of changing the style, adding headers and footers, creating buttons, adding products, and uploading photos and videos.

Navigate to the Kiosk tab at the top. Use the + to expand the My Showrooms category and select the showroom to edit.

The showroom will load to the right. Scroll down and select Edit This Showroom. Every page can be edited.



At any time, you can select **Return to System** to leave the showroom editor.

Change the Style

The look of the showroom can be changed to ensure a consistent look. Select the Style tab from the bottom right.

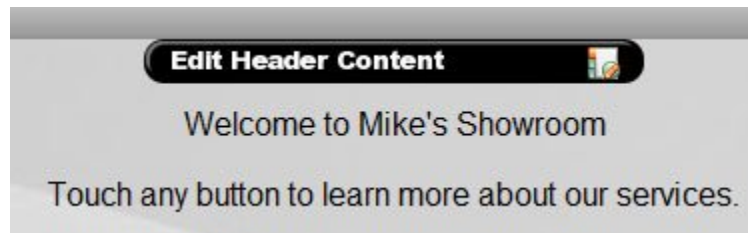
- Font – Adjust the font style for buttons.
- Font Size – Adjust the font size for buttons. If changed, we recommend changing the button size to match.
- Button Size – Adjust the size of the buttons. If using a touch screen, you may want to adjust to a larger size. If changed, we recommend changing the font size to match.
- Button Border – Adjust the border that appears around the button.
- Button Spacing – Adjust the space between each button.
- Button Fade – Adjust the feathering on top of the button so it does not appear as a squared image.
- Button Columns – Adjust the number of columns for buttons.
- Product Columns – Adjust the number of columns for products.
- Save This Style

To close the window, click the Style tab.

Headers and Footers

Every page of showrooms contain header (top) and footer (bottom) options.

Click the Edit Header Content button. Type the content and when complete, click Save Header Content.

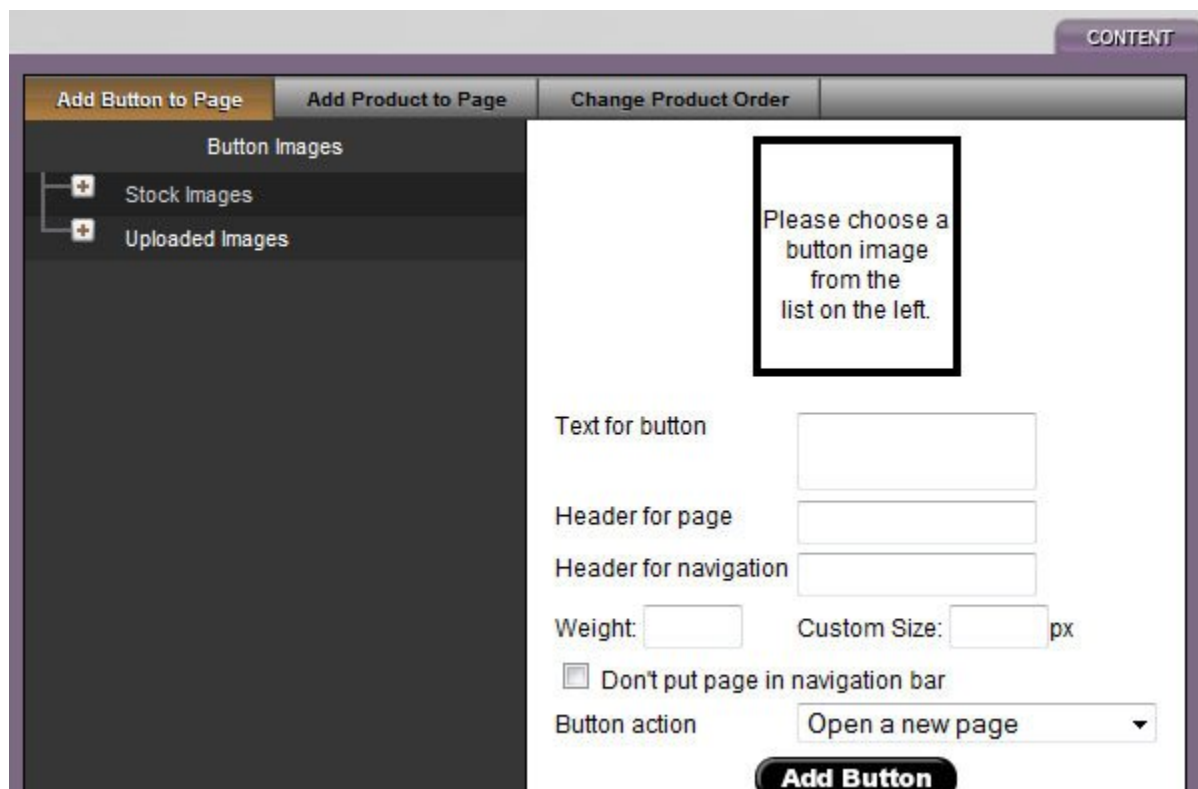


Editing the footer works the same way except you click the Edit Footer Content button to enter content. When complete, click Save Footer Content.

Buttons

Adding buttons to your page helps visitors easily link to different areas of the showroom.

Click the Content tab at the bottom right.



Choose an image by clicking the + icon to expand one of the following categories:

- Stock Images – Images provided.
- Uploaded Images – Images uploaded from your computer.

Enter the Text for button.

Header for navigation is the title to appear in the navigation menu (see below).



Enter the weight and size for the button (optional) or skip and leave as the default. If the page is not to appear in the top navigation, check inside the Don't put page in navigation bar box.

The Button action – Choose how the button opens when clicked. When complete, click 'Add Button'. To close the window, click the 'Content' tab.

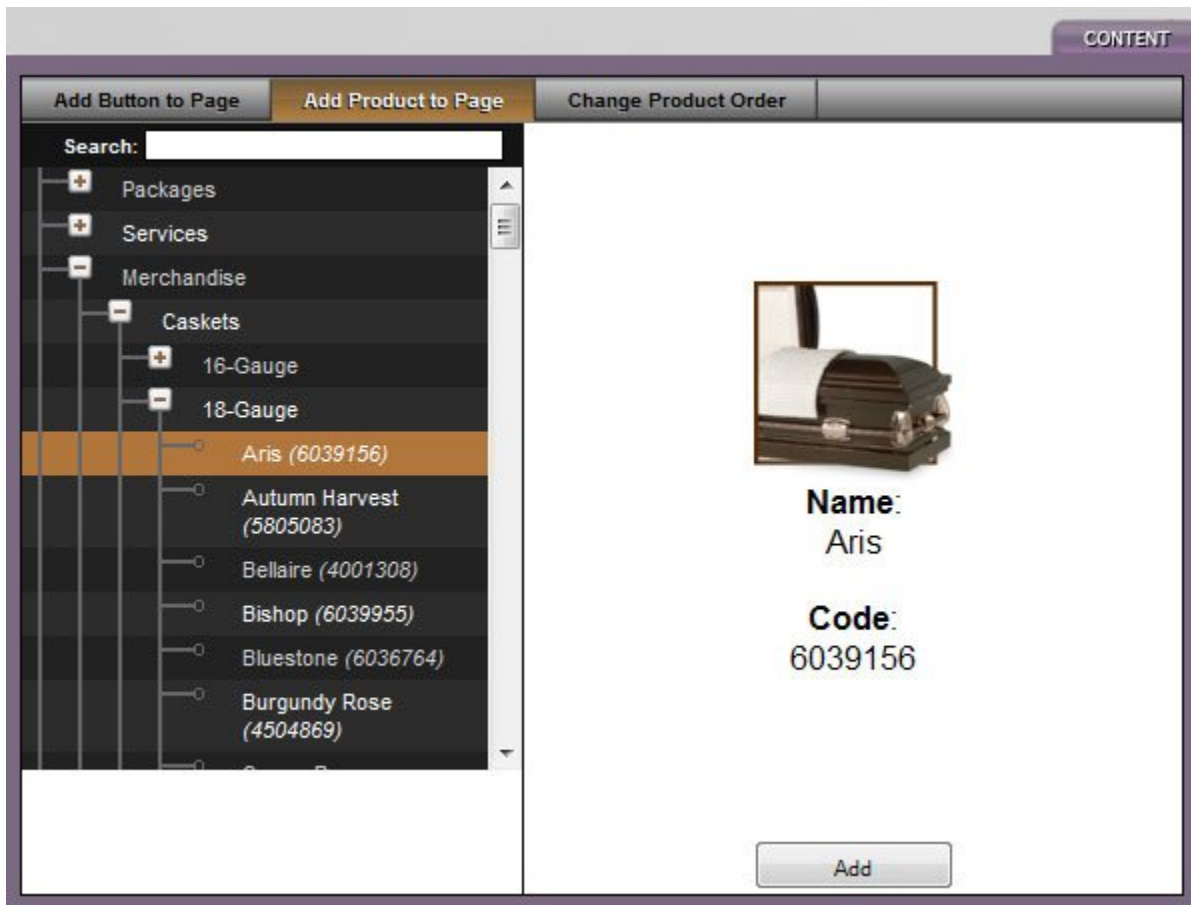
Click on the new button to add content or more buttons to the page. Mouse over the button to display options:

- Delete the button and any content.
- Edit the button (picture or title).
- Copy the button to paste it (and content) on another page. Navigate to the page where the button will go and "paste here" at the top left.



Add Products

Click the 'Content' tab at the bottom right. Navigate to the 'Add Products to Page' tab. If products are missing, [add them to the product database](#). Matthews clients should contact their sales representative if products are missing.

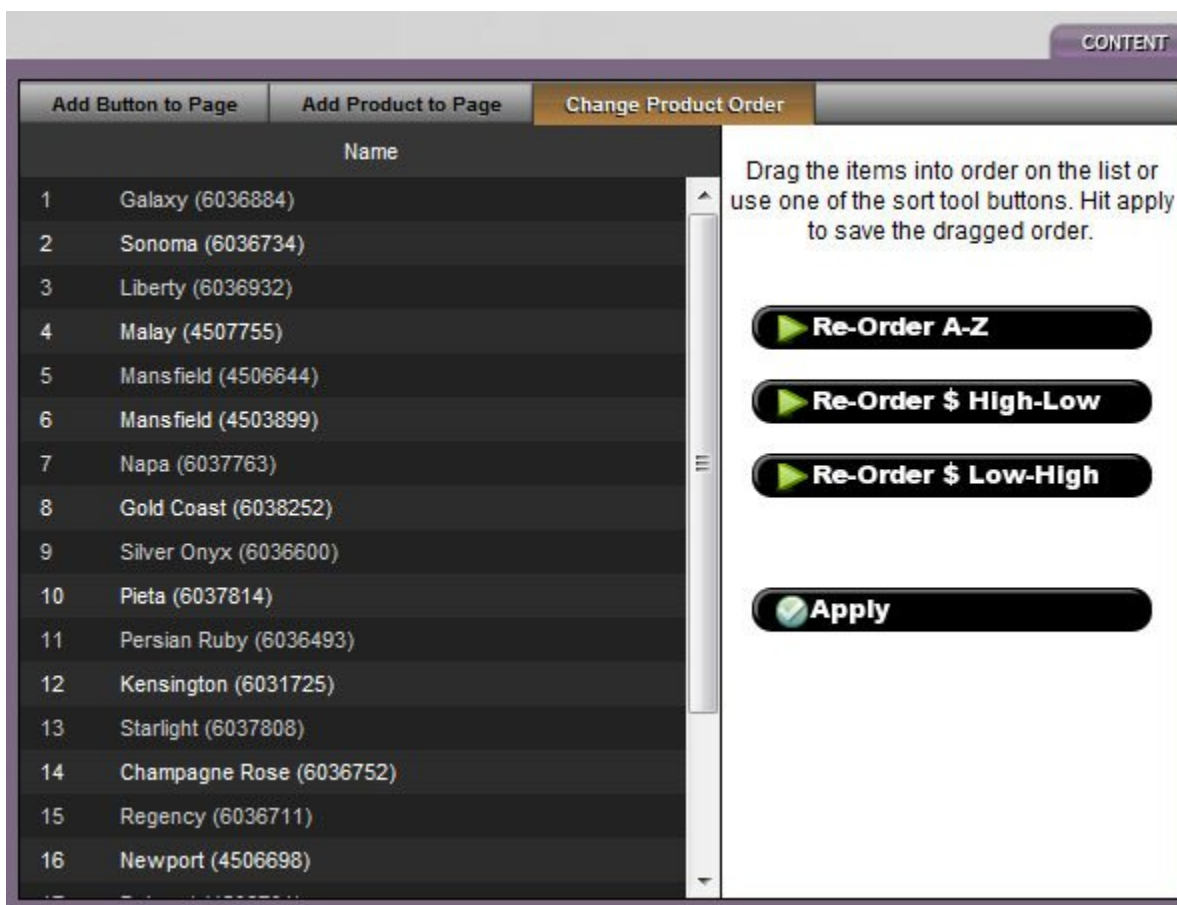


Click on the + beside any category to expand the list. When a selection is chosen, the image, name and code will appear on the right. To add more than one product, hold down the Shift key and the down arrow.

Select 'Add' for the selection to appear on the page. To close the window, click the 'Content' tab. Mouse over the product and click the X icon to delete the product off the page.

Product Order Change

Click the 'Content' tab at the bottom right. Navigate to the 'Change Product Order' tab. There are four options:



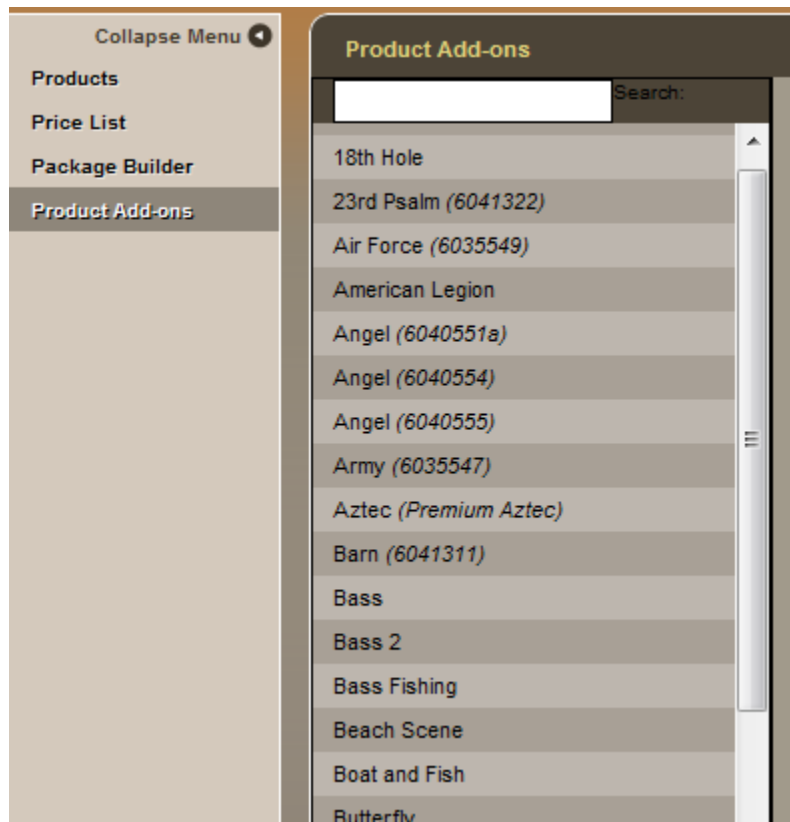
1. List A-Z alphabetically.
2. List by price (high to low).
3. List by price (low to high).
4. With the list on the left, drag and drop the products.

When complete, select 'Apply'. To close the window, click the 'Content' tab.

Product Add-Ons

For Matthews customers, pricing for all of corners and cap panels can be added through the 'Product Add-Ons' section. You can access the catalog by navigating to [System Settings> Catalogs> Product Add-ons](#).

To add pricing to a product, select that product from the list by clicking on it.




You will see all of the product information load on the right hand side of your screen. Please enter your retail price and save your changes.

SaveCloseDelete

Editing Feature

Image:



Name:

Draped Cross

Code:

6041309

Wholesale Price:

Retail Price:

Taxable:

☐

Category:

Once the pricing has been entered for the Add-ons you will then see them in your showroom/Kiosk.

Galaxy
Model #71007962
Price: \$3,995.00

Stainless Steel
Brushed Pearl Tigereye Finish
Arbutus Velvet Interior
71007962

Corners:

No Corners


▶


Panel:


No Panel


▼


No Panel

18th Hole - \$195.00

American Legion - \$195.00

Bass 2 - \$195.00

Bass Fishing - \$195.00

Beach Scene - \$195.00

If you are selecting any of the add-ons within the showroom it will also update the casket price immediately to show the changes.

Galaxy
Model #71007962

Price:	\$3,995.00
Cap Panel:	\$195.00
Total:	\$4,190.00

Stainless Steel
Brushed Pearl Tigereye Finish
Arbutus Velvet Interior
71007962

Corners:

Panel:

Add a Photo

Click the 'Photos' tab at the bottom right. Click the 'Browse' button and locate the photo (must be in .jpg format) and either double-click on the photo or click 'open'.

The photo will appear in the list and can be added or edited. To close the window, click the 'Photos' tab.

Add a Video

Click the 'Videos' tab at the bottom right. Click the 'Browse' button to locate the video (must be in .FLV format) and either double-click on the video or 'open'.

Your video will appear in the list and can be added to any showroom page. To close the window, click the 'Videos' tab.

To convert a video file for free, [click here](#).

[<< Create a Virtual Showroom](#)

[Launch a Virtual Showroom >>](#)

Launch a Virtual Showroom

Launching a showroom would be to showcase your products and services to your families.

Navigate to the Kiosk tab.

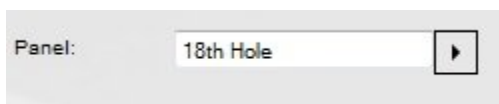
Select the + icon to expand the 'My Showrooms' category. Locate the showroom name and select the 'Launch This Showroom' button. A new window will open with your Kiosk loaded. Click the buttons to navigate through the showroom. Your families can browse merchandise, services, videos, etc.

Merchandise

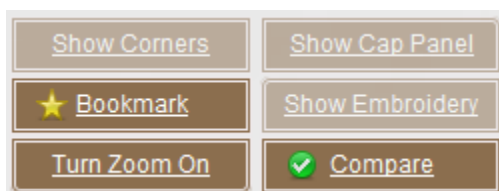
- Select the 'Merchandise' button from the main page.
- Select the 'Casket Selections' button.
- Select the 'Choose by Material' button.
- Select any button to open that selection of caskets.
- Select a casket.

* Matthews products can be customized with casket corners, cap panels, and overlay embroidery. These options will only appear (within dropdown menu(s) on the left) if available. A picture will display without customization options if any other manufacturer product is added. If available, click the arrow to view the image options.

Select an image to generate a preview of the casket. In this example, the 18th Hole cap panel was chosen. There is also an option to view the cap panel image in a larger format.



The 'Bookmark' button is used to bookmark merchandise to preview later. Once bookmarked, the merchandise will be saved within the bookmarks section at the top right.










To zoom in on any part of the product, click the 'Turn Zoom On' button. Cursor over the section to be magnified. Click the 'Turn Zoom Off' button to stop zooming.



The 'Compare' button sets up the products side-by-side across the page. When complete, click 'Search' to view your results.

Search: Category: 18-Gaug ▼ Price From: To: Bookmarked: ☐

Exterior Color: Blue ▼ Interior Color: All ▼ Interior Material: All ▼

				
Aris - N/A	Classic - N/A	Going Home - \$2195	Going Home - \$2195	Neopolitan - \$2995

Service Offering

Select the 'Back' button at the top right until you reach the main page.

- Select the 'Services' button. The services area is intended for families to browse the funeral home's service offerings.
- Select the 'Personal Ceremonies' button and the 'Dove Release' personal service. The family can view any available photos, descriptions and most importantly, the video demonstrating the live service.

[<< Edit a Virtual Showroom](#)

[Create / Edit a DVD Slideshow >>](#)

Create / Edit a DVD Slideshow

These powerful and easy-to-use digital video tribute programs allow your funeral firm to create stunning and memorable life event videos for families. The DVDs are greatly appreciated by family members during memorial services and long after. Your firm can create multiple copies for the family to distribute as keepsakes.

- [FrontRunner DVT](#)
- [Tukios DVT](#)
- [Animoto DVT](#)

FrontRunner DVT

In minutes, your firm can create stunning, moving memorial tributes to offer families. Once created, the video files can be burned to a DVD using a preferred program.

Open a record and navigate to Digital Video Tributes: Create New Project



Tip: If the screen appears too small and requires constant scrolling, click the arrow to the left of Basic Information to view the screen in another tab.

The Project Options checkboxes will automatically be checked.

1. Check either the ISO or .MPG program to burn the DVD.
2. Leave 'Include Video Link in Book of Memories' checked to ensure the DVD link is visible in the Book of Memories.
3. 'Display Birth & Death Dates in Video' – uncheck to eliminate the information from the video.

- ☒ Create a DVD ISO File
- ☒ Create a downloadable .MPG
- ☒ Include Video Link in Book Of Memories
- ☒ Display Birth & Death Dates in Video

- Create a name (ex. family name) for the video. If that information is entered in the record, the name, date of birth, and date of death will automatically display.
- Next
- Choose the intro for the video. Select the theme pack. By default, the chosen Book of Memories theme will be included in the dropdown.
- Preview Video to view an example of the theme.
- Next
- Choose photos for the video. All photos uploaded by the funeral home or shared by online visitors within the Book of Memories will be available. Choose specific pictures or click the Select All link. To add more photos, Upload Photo. Add Files (or Cancel Upload). Locate the photo(s) on your computer and open. The photo will load to the pop-up window. Start Upload. If more photos are uploaded, select all the pictures to add to the video.
- Next
- There are also videos available to use in the video (optional). Select the arrow icon to preview the video. To add a video, click the + icon. Once added, the name will appear on the right. To remove it, click the X icon.
- Next

- Choose music from the library or upload your own. (Note: The DVD program currently requires a music track to operate. [Contact your Success Coach](#) if you would prefer no music. There is a file available for upload that contains no sound.) Select the arrow icon to preview the song or click + to add the song. You may add multiple songs or the same song multiple times.
- Next
- In the video timeline, click a photo and drag it to the left or right to change the order of the photos.

DVT Editing Options



- Add/Edit Motion – Choose the transition. Click on a photo and select Add/Edit Motion. Choose from the different transition options in the pop-up window. The direction of the arrows indicates which way the photo will move. Select the transition and APPLY. If no transition is set, by default, the photo will fade in and out within the center of the slide.
- Edit Photo – UNDO at any time.
- Crop: Cut part of the photo. Click the Crop icon. Drag the box over the part of the photo to display. Click Apply Crop.
- Straighten: if crooked.
- Auto Contrast: Adjust contrast setting.
- Auto Brightness: Adjust brightness setting.
- Grayscale: Convert a photo to black and white.
- Rotate
- APPLY
- Add Text – Click on a photo and select Add Text. In the pop-up, click the area and add text in Text Line 1 and Text Line 2 (if required). Keep each line short to ensure the text fits on the slide. APPLY
- Delete Item – Click on a photo and choose delete.
- Next

Download a preview of the video

Render Low-Res Preview: The time needed to render the video will vary depending on the number of photos and videos included. The preview will automatically start playing.

Click BACK to modify any aspect of the DVD.

✿ The project costs depends on your service level. Available Credits will display; click 'Pay with Credits' if there are enough.

- To purchase additional credits, Buy More Credits. Choose the number of credits to purchase; the associated cost will appear below. Enter Billing Information and Proceed to Payments or Cancel Purchase.
- On the secure payment site, the information previously entered will be visible. Continue or modify if necessary.
- Enter the credit card information and then Submit to Card Issuer
- Available credits will display. Pay with Credits.

Once the payment process is complete, CREATE VIDEO

The video will render and a download link will become visible when the project is complete. Select OK.

✿ To edit a video already created, click on the project name.

For information on printing your case, insert and label, [click here](#).

DVD Copy Protection

To copy protect your DVDs, FrontRunner uses Protect Software that secures your valuable videos effectively against illegal copies and sharing. Once your ISO file has been generated, open the video editor and go to step #4. Refer to the bottom section for Copy Protection.

First Time Users – Registration

If you are using this for the first time, you will need to Register. Enter your email address and create a password. Register. An email will be sent to you. Click the link within to confirm the registration.

A new tab will open when your email is successfully verified. You will be asked to download the ProtectBurn software. Follow the steps: Save – Open Downloads – Run – Install. You will need to reboot your computer following installation.

Buy Licenses

Right click over the icon in the icon tray at the bottom right of your computer monitor and click Buy Licenses. You will need to do this before you can copy protect your DVD.

- Choose a license option. Add to Cart. Next.
- Enter your email address and password. Next.
- Complete customer information. Next.
- Place Order.
- Complete the credit card information.
- Copy Protect Your File: Locate and open the DiscProtector Video program on your computer. (Some optional settings will open. The default source is where the ISO file can be found whenever uploading into the program. The default destination is where the copy protect version will be saved each time. If you do not choose any settings, you can save each time.) OK. Next.
- Enter your email address and password. Next.
- The File will be for the ISO file you have saved on your computer. Click the Browse button and locate the file. Double click on the file then Open. Next.
- You will need to choose where you want the protected copy to be saved on your computer. Click Browse and choose a folder you want it saved in. Also, give the file a name then click Save. Next.
- When process is finished, click Next. Finish.
- You may now upload the protected file in your DVD burning program to create the DVD.

Frequently Asked Questions

Question #1: Is there a way to adjust the speed of the video to allow more time for each photo?

Answer: There is no way to adjust the speed. We suggest 6 seconds per photo transition plus 1 minute combined for intro/exit videos. A 5 minute song, for example, would be good for 40 photos.

Question #2 What programs do you recommend for burning DVDs?

Answer: There are many options available to burn DVDs; some are free while others are available for download at a range of costs. We suggest that you take a look at the ratings and how each works to determine which program will work best for you. Of the various free options available, we can recommend [CD-Burner-XP](#).

Question #3 I know I need the rights to the music but is it okay if I upload a song I've purchased through iTunes?

Answer: No. Purchasing music does not mean you have the rights to use it. The only exception is through such sites as www.royaltyfreemusic.com.

[<< Create / Edit a DVD Slideshow](#)

[Tukios DVT >>](#)

Tukios DVT

Tukios offers high-quality tribute videos that are easy and fast to create. Visitors to the website can purchase a DVD file to burn for themselves or purchase a copy of the DVD or Bookshelf Box Set. Your funeral home earns a commission on these sales.

✿ If you would like to activate and/or increase the price of the direct-to-consumer products available in the Tukios system, [contact your FrontRunner Success Coach](#) to arrange.

Create Your Video

Open a record and navigate to Tukios.



Create Project:


- Enter the Name of the project (ex. deceased's name)
- Enter the 'Birth Year'
- Enter the 'Death Year'
- 'Create Project'.




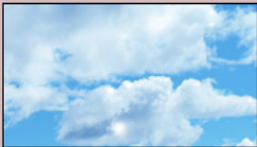
✿ At any time, click on **Back** to return to previous screens / options.
At any time, click on **Support** at the right of the screen to request help with your video project.

Themes

Click on 'View Sample' below to preview any of the numerous themes. Themes showing 'Book of Memories' in the bottom left corner match our Book of Memories memorial websites. Click on 'Select this theme' to choose the video introduction. Next.

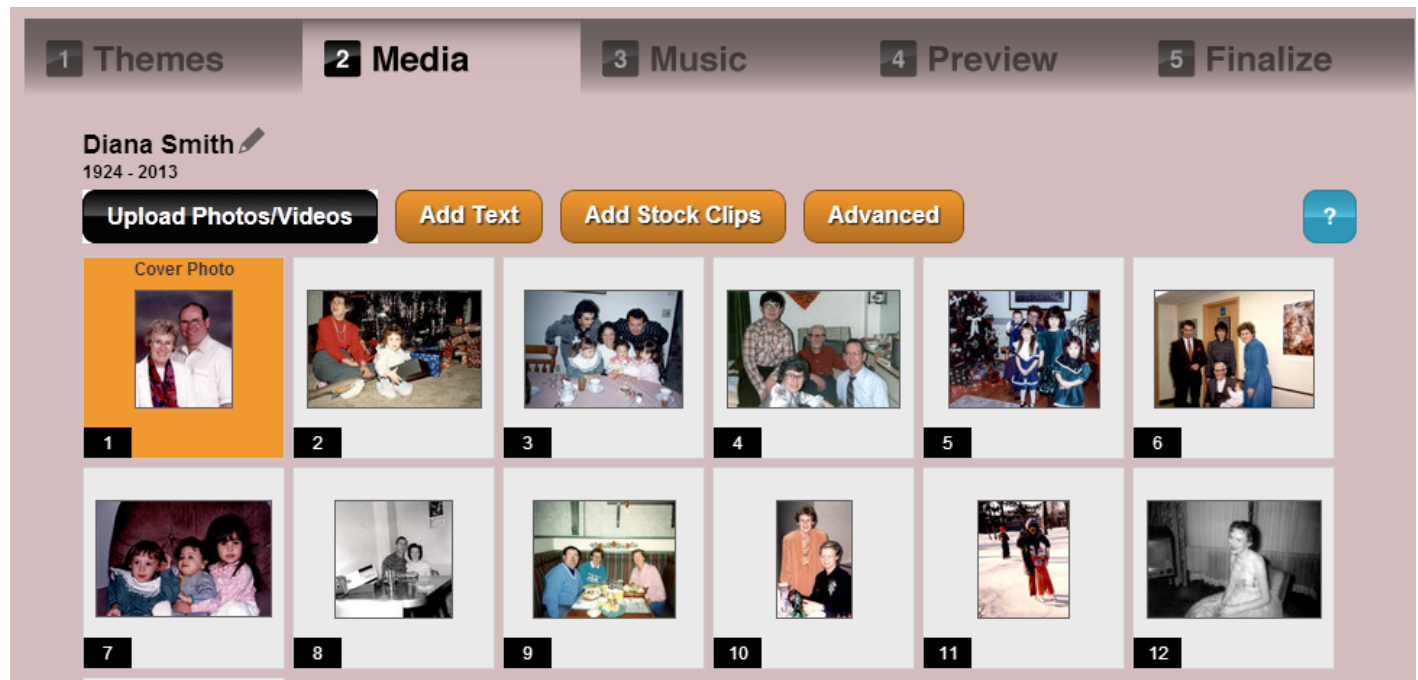
1 Themes **2 Media** **3 Music** **4 Preview** **5 Finalize**

Diana Smith 
1924 - 2013

American Flag  Select this theme View Sample	Candlelight  Select this theme View Sample	Christian  New Select this theme View Sample	Clouds  Select this theme View Sample
--	--	--	---

Media

Select 'Upload Photos/Videos'.



All photos from the Book of Memories can be selected but to load additional photos – locate the photo and video files (unlimited) on your computer – click to highlight – and click 'Open' on bottom right of pop-up window.

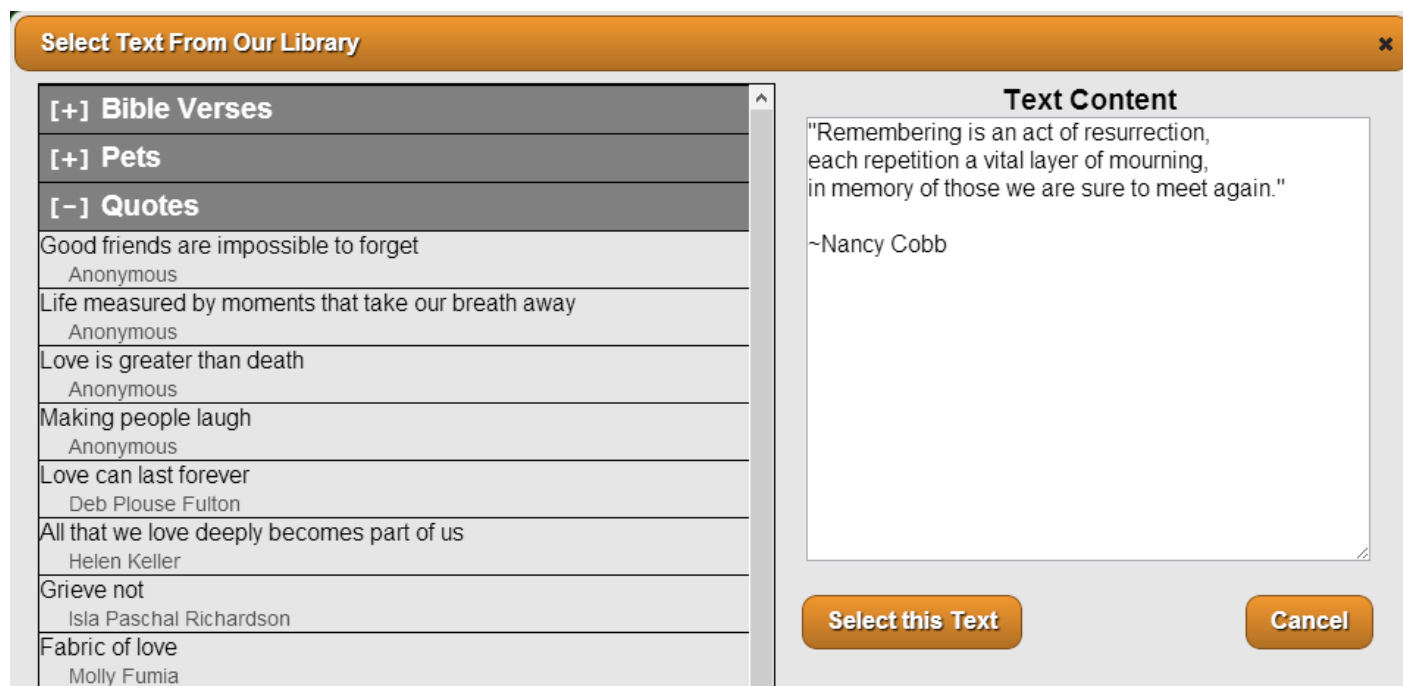
✿ Hold the 'Ctrl' key on your keyboard to select multiple files at a time.

Mouse over each photo to access 'Rotate', 'Edit' and 'Delete' options.

- Choose the arrow buttons to rotate left or right.
- Choose the edit option to crop the image, add a caption, choose effects, and add timing to the slide. Click on the 'Advanced' button to access more options (enhance, brightness, redeye, etc.)
- Click on the red X to delete a photo.

Add Text

Click to create a new slide that contains text.

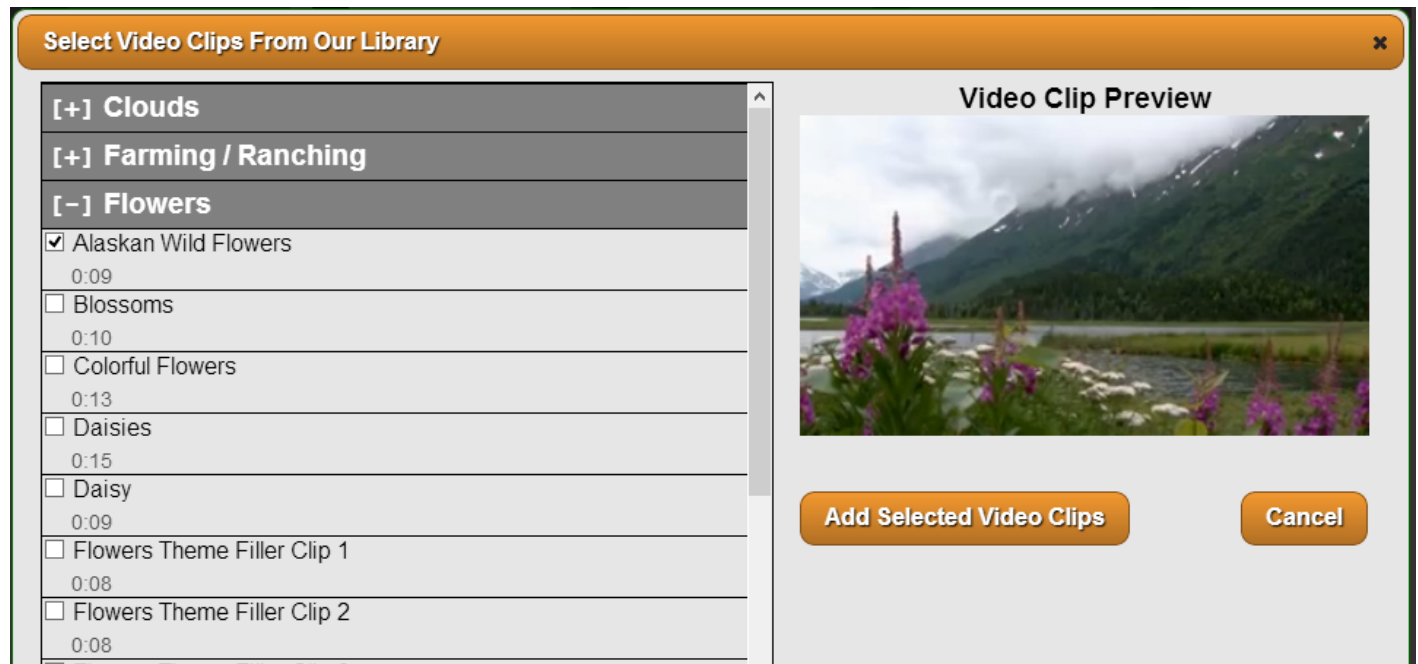


1. Choose from our Library – select pre-written text from 'Bible Verses', 'Pets', or 'Quotes'. Click on the text to view content on the right of the window. A pop-up window will appear and allow you to edit the slide – change the background or edit the text.
2. Enter your own text – in the 'Caption' box, write (or paste from another source) the text you would like to include on the slide. Change the background to black, white or themed image.

Click on 'Select this Text'.

Add Stock Clips

Click to add video clips that can be placed between any series of photos.



- Click on the + beside any video category. Click on any selection to preview the video on the right. Click on the white box to create a checkmark beside chosen videos.
- Choose 'Add Selected Video Clips'

Advanced

Select this option to further customize the video. The Advanced options include selections for Transitions, Effects and Background. Check the box 'Remember this configuration for next time' and then select 'Save Video Customization'.

Customize Video ✕

[-] Presets

☒ Simple ☐ Medium ☐ Fancy

[-] Advanced

Transitions

- ☐ Circle
- ☒ Crossfade
- ☐ Cube
- ☒ Move
- ☐ Over
- ☐ Radial
- ☐ Scan
- ☐ Scans
- ☐ Spiral
- ☐ Strip
- ☐ Swirl
- ☐ Under
- ☐ Water Drop

Effects

<input type="checkbox"/> Diving	Edit
<input type="checkbox"/> 4 Pieces	Edit
<input type="checkbox"/> Center Blades	Edit
<input checked="" type="checkbox"/> Zoom	Edit
<input type="checkbox"/> Panel	Edit
<input type="checkbox"/> Rectangles	Edit
<input type="checkbox"/> Rotator Board	Edit
<input type="checkbox"/> Slices	Edit
<input type="checkbox"/> Filmstrip	Edit
<input type="checkbox"/> Bulletin Board	Edit

Background

- ☒ Stretched Photo
- ☐ Black

☐ Remember this configuration for next time

Save Video Customization **Cancel Changes**

To arrange the video assets, click and drag to the desired position. Click Next to proceed.

Music

Choose music selections from the library or upload your own.

Choose from our Music Library

[+] Joyful

[+] Religious

[+] Reflective

[+] Piano

[-] Guitar

Artist Name	Song Name	Length	Preview
<input type="checkbox"/> Michael Dowdle	I'm Trying to be Like Jesus	3:18	
<input type="checkbox"/> Michael Dowdle	A Brighter Day	4:35	
<input type="checkbox"/> Michael Dowdle	Gee Song	3:51	
<input type="checkbox"/> Michael Dowdle	Where the River Bends	4:10	
<input type="checkbox"/> Michael Dowdle	A Poor Wayfaring Man of Grief	2:51	
<input type="checkbox"/> Michael Dowdle	Old New Yorker	3:28	
<input type="checkbox"/> Michael Dowdle	Teach Me to Walk in the Light	2:43	
<input type="checkbox"/> Michael Dowdle	The Simple Life	3:26	

Add Selected Songs

Click on the + beside the music categories to view the various artists and songs. Click on the arrow button to preview any of the music selections. You may add multiple songs.

To add your own music, select the 'Upload Music' button to locate the audio file on your computer.

The music screen will show the music length versus the video length as well as the length of time auto-calculated per slide. To override these settings, click 'Advanced Settings'.

Click Next to proceed.

Preview

A low-resolution preview of the video will be generated. It may take a few minutes or longer depending on number of images and videos. To share the file (with family members), click "Share Preview". Click Next to proceed.

Finalize

Order Checkout.

- Video Generation – There is a one-time fee for generating the digital video copy, which can be used for burning to a DVD and video hosting via an embedded link. There will be NO additional fees for subsequent orders.
- Memorial Bookshelf Box DVD Set (optional) includes DVD, a CD of all photographs, and prints of up to 75 photographs – all contained within a memorial keepsake photo box. Add the quantity of this keepsake.
- Standard DVD (optional) with matching DVD label and case. Add the quantity of DVD Tribute Videos in custom jackets.

Billing Information will auto-generate from FrontRunner; to change, click the pencil button.

Place Order – opens the billing entry screen and prompt you to enter credit card information.



Note: There are many options available to burn DVDs; some are free while others are available for download at a range of costs. We suggest that you take a look at the ratings and how each works to determine which program will work best for you. Of the various free options available, we can recommend CD-Burner-XP. For more information, visit: <http://cdburnerxp-64-bit.en.softonic.com>.

Post DVT to Book of Memories

The Tukios home screen displays all video projects by name. Once the video is complete, click on the 'Add to BOM' option to the right of the project name to make it available on a record's Book of Memories. Once the video is posted, the option to 'Remove from BOM' will become visible if you choose to delete a video from the Book of Memories.

The Tukios home screen also displays all video orders to date including the order totals and earning:

Orders							
Order Id	Product Name	Project Name	Order Date	Quantity	Wholesale Total	Order Total	My Earnings
					\$0.00	\$0.00	\$0.00

[<< FrontRunner DVT](#)

[Animoto DVT >>](#)

Animoto DVT

Animoto offers tribute videos that are easy and fast to create.

✿ If you would like to activate in your system, [contact your FrontRunner Success Coach](#) to arrange.

Create Your Video

Open a Record > Digital Video Tributes > Create New Video.

Step #1 – Use the dropdown to select a theme.

When you select a Celebration of Life theme, additional images and video clips are automatically created and transferred to Animoto, along with your selected photos, to create a personalized DVD Tribute video that includes the decedent's name and dates, and the funeral home's name and logo.

- **Preview DVD Case** – Allows you to view the DVD case using the theme chosen.
- **Sample Video** – Allows you to view the sample video with the theme chosen.

A theme encompasses additional images and video clips that are specifically designed to complement the main theme of the video. These interludes are designed to shift the momentum and give a warm cinematic feel to tribute videos. These are all professionally made and give that “special touch” to your client families.

Step #2 – Selecting a music track for the tribute video. You have three options:

- Select one of FrontRunner's exclusive tracks for funeral services
- Select a track available in Animoto's library of music
- Implement your own music

✿ **Note:** Licensing for popular music is the responsibility of the funeral home

We've made it seamless for you by providing the most appropriate music right at your fingertips. Preview Music to sample our suggested tracks.

Step #3 – Select the images you would like to use to create your tribute video.

✿ Note: Only family approved photos are listed if the Photo Approval System ([Global BOM Settings](#)) is turned on, otherwise all photos are listed.

Photos uploaded to a FrontRunner system's client records are displayed here. You can mark the photos you would like included by putting a check mark in the top left corner; click anywhere on the photo for the check mark to appear/disappear. You can easily choose all photos or un-select all photos. Choose Select All or De-Select All . To view more photos than the 8 listed, just click Next to take you to the next page. You will notice this button located centred and directly beneath the photo listing.

✿ Note: If you want to change the order of the photos, please wait until all assets are transferred to Animoto. There you will find a simple-to-use interface to re-arrange the photos.

Step #4 – Once selections are complete, click Submit to Animoto.

This will gather the name, dates, theme selection, video clips, music selections, photos, and even your funeral home logo (if FrontRunner Professional has it on file) and send it to Animoto for completion. This button will take you directly to the Animoto account page.

! Note: If you have not yet setup an Animoto account, you will need to do so first. After sign-up is complete, you will be sent to the Animoto Create Video page. You will then be able to put on the finishing touches.

If you are already logged in this will import all of the assets selected and allow you to put the finishing touches on the video, otherwise, please log into your account.

Step #5 – You are now in your Animoto account.

This section will let you re-arrange the order of photos. It will also allow you to add any photos or video clips that the family may have provided or just want included in the video. You can also let your creative side take over and add in special features such as text boxes, spotlights, or picture enhancements. At anytime you can drag the slides around and drop them where you wish to place it.

You will notice that there are extra frames located throughout the video, and especially at the beginning. These are part of the introduction video and theme that are strategically placed

throughout the video. There is no need to move or delete these pictures/videos unless you choose to do so. However, we have received tremendous feedback for using this asset throughout our tribute videos.



This button allows you to add more photos or videos clips to the project, however, we highly recommend uploading the photos into your FrontRunner system then re-submit to Animoto as a new project. There is no way to get new photos from Animoto back to your system so they will not be displayed in the Book of Memories.



Click this button to add a text slide. Once added you can click and drag this slide anywhere in the timeline.

Here's a list of suggested text titles:

Male

- Devoted in every aspect of his life
- Touched so many lives. An inspiration to us all
- A husband. A father, a friend
- Guided us Always. Will never forget.
- Forever in our hearts. Memories of a Lifetime
- Always a father first
- Strong Presence, Kind Heart
- Devoted Father, Loving Husband
- An Inspiration to Others; A Family Man

Female

- Devoted in every aspect of her life
- A love of life. A love of family and friends.
- A touch. A smile. Always with us.
- A teacher of life. Thanks for showing us the way
- Forever in our heart. Memories of a lifetime.
- Led by Example. Forever a Mother
- Loved Wife, Devoted Mother
- Kind Woman, Warm Hearted

Veteran

- Courage Honor Respect. An inspiration to us all
- Serving Our Country. Protecting us all
- Devoted in every aspect of life
- Showing us the way. With unconditional love
- Forever in our hearts. Memories of a Lifetime.
- Duty Honor Loyalty
- Led the Way. Dedicated Soldier

Pets

- With a look. We knew we were loved.
- Faithful forever. Always by our side
- An unforgettable friend. Forever in our heart
- Man's Best Friend
- Special Place in our Hearts
- Rain, Wind, or Snow. Always by our Side



The spotlight feature highlights a particular image (or multiple images) that tells the Animoto engines to sustain the slide longer in the video. Each video is paced according to the rhythm and genre of the accompanying song. The spotlight feature makes that slide stand out in the final render.

To activate this feature just click on the picture you want spotlighted once and then click on the spotlight button at the bottom of the page. You can do this to as many pictures as you wish.



Tip: Hold the CTRL key while clicking on multiple photos and click spotlight once to spotlight all of them.



Rotate will move the selected photo 90 degrees to the right. Click on the photo you would like to rotate, then click the rotate button as many times as you like to put the photo in the right orientation.



This feature will replace the photo chosen and allow you to put it elsewhere in the timeline. Click on the photo once and then click the duplicate button. This will place the photos side-by-side.

Once there you can click and drag the photo anywhere in the timeline.



Delete will remove the selected photo.

Click on the photo you would like removed, then click the delete button.



The Shuffle option will re-arrange the order of all images/videos/text slides in a random order, however, **do not** ever shuffle your video. Photos and video clips have been placed in a specific order to help the flow of the video.

Step #6 – When complete, select the Done button.

Step #7 – Choose your music

If you have already selected a music track on the FrontRunner side, then you can skip this step by clicking on Continue. If you haven't selected a track yet, click change your soundtrack and you will be walked through the process of selecting or uploading a music track. (Animoto will always suggest a music track for you) Animoto music tracks are varied and include songs from many genres: romantic, top 40, classical, new age, religious, etc.

Select – Allows you to pick music from Animoto's selection. Browse through the categories. Click the icon to choose a song.

Upload – Allows you to upload music from your computer. **Please make sure you have the proper permission from the artist or label.**

Step #8 – Customize your video.

- **Image Pacing** – Should be set to ½ speed. This gives the delicate and soothing pace that is appropriate for a funeral service.
- **Video Length** – Should be set to Full-Length. The short option limits the video to 30 seconds and this simply isn't enough time to communicate the value of a tribute video.
- **Video Style** – DVT sets the default to The Animoto Original. This is done so that the added interludes and images complement each other in the best way possible. We encourage clients to try different styles but we have found the best results by using the original style.
- **Options** – These options are to play video specific credits at the end of the video, NOT funeral home specific. This is why we recommend that both boxes be checked prior to continuing. This means that only the funeral home information will be shown in the video. You will notice that FrontRunner

Professional automatically puts your funeral home name and logo (as long as it is on file) at the end of the video.

Step #9 – Enter a title of the video.

Example: In Memory of....

Step #10 – You do not need to enter a description.

Step #11 – For the Producer Name, you can enter your funeral home name.

Step #12 – Advanced Options – enter your funeral home name for the title and your website address for the URL.

This will place your funeral home name and a link back to your website on the last slide. **All information placed in this section is for the benefit of organizing your videos in Animoto. These fields will have no effect on the actual video itself or the video on your website once linked.**



All videos are kept in the My Videos section of Animoto, which means you don't need to store them on your computer and occupy hard drive space. Every time you send information to Animoto from your FrontRunner System, a new project will be created.

Step #13 – Select the Create Video button to start the generation process.

Generation times can vary slightly depending on the number of photos and assets used in videos. Creation should only take minutes. Click on the My Videos link at the top and wait for your video to finish producing.

After you have completed creating a video in Animoto, you may:

- [Link it to the Book of Memories Video Tribute](#)
- [Print the DVD case sleeve and disc label stationery.](#)
- [Transfer to Disk/Media](#)

For more information on using Animoto, please [visit the Animoto Helpdesk](#).

[<< Tukios DVT](#)

[Book of Memories Link >>](#)

Book of Memories Link

Open a Record > Digital Video Tributes > Enter Video Link for Book of Memories.

If you still have the tab open on your browser for the Animoto page, you should still be at the preview movie page. If you are not, simply click on My Videos at the top of the Animoto screen. This will take you to the list of videos you have produced.

Before entering the link for the Book of Memories you want to make sure you are using the best quality for your video.

- Step #1 – Hover your mouse over the video you want to link.
- Step #2 – Click on Actions button and then select Download.
- Step #3 – Click the Upgrade (Free) button located on the same level as the HD-720p quality of your video.
- Step #4 – Once the download is done, click on the Refresh the Page to View It button to refresh your browser.
- Step #5 – Hover your mouse over the 720p video you want to link.
- Step #6 – Click the Action button and select Share.
- Step #7 – A window will pop up. Click the Share the Link option.
- Step #8 – Highlight one of the links then right-click on your mouse and copy.
- Step #9 – You can now go to the FrontRunner side and click on Enter Video Link for Book of Memories (within the Digital Video Tributes section); right-click in the Video Link space and select Paste.
- Step #10 – Once pasted, click outside of the video link space for the check mark to appear. This confirms the link is correct.
- Step #11 – Click Preview Video to ensure that you have used the correct link and click Save Link when complete.

[<< Animoto DVT](#)

[Manage DVD Sleeve & Label >>](#)

Manage DVD Sleeve & Label

Open a Record > Digital Video Tributes > Print DVD Sleeve and Label.

This process allows you to print the personalized DVD case sleeves and disc label.

- Step #1 – Use the dropdown to select a theme.
- Step #2 – Select the item to be printed (Don't forget to load the printer with the correct paper form).
- Step #3 – Select either Preview or Print .



Change Layout or Text

Select Advanced Printing mode: System Settings > Print Engine > Manage DVD Sleeves and Label

This section will allow you to print the DVD Sleeves and Labels for your Digital Video Tributes. We highly recommend that if you want to use your own images, take your sleeves and labels to a local printing company to create for you. Once you have the image on your sleeve and label, you can add it to your system for printing.

Step #1 – Select the New button.

- Name – Enter the name of the package (group name). Example: You could name a group as Prayer Cards or Remembrance.
- Description – Enter a description regarding this package name.
- Vendor – Enter the suppliers name.

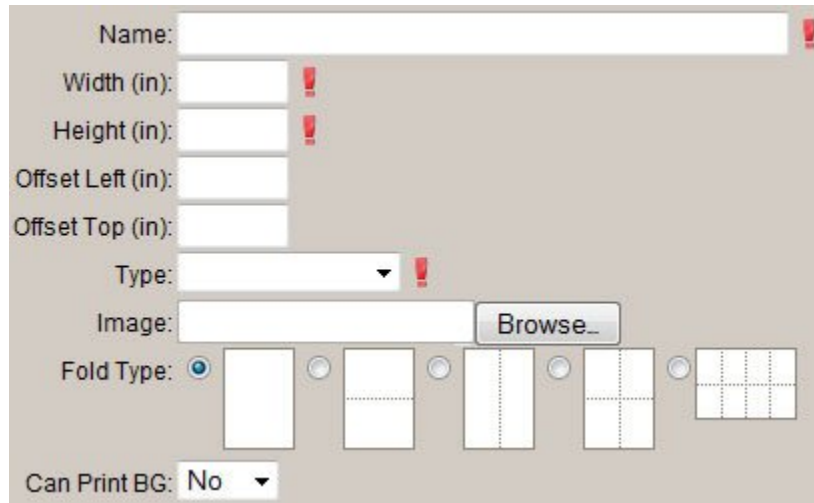
A screenshot of a web form titled 'Edit Stationary' in a dark header bar. The form has three input fields: 'Name:', 'Description:', and 'Vendor:'. Each field has a red exclamation mark icon to its right, indicating a required field. At the bottom right of the form are two yellow buttons labeled 'Save' and 'Cancel'.

As you type, it will pull a list of supplier's names you have already entered. If this is a new supplier, two new fields will appear:

Step #2 – When complete, select the Save button.

Once your package is added, you have the ability to add stationery into your package. Select the Edit button.

Step #3 – From the top left, go to File > New or if you are entering into this package for the first time, complete the following fields:



- Name – Enter the name of your Sleeve/Label.
- Width/Height – Make sure to include the width and height of the Sleeve/Label (inches).
- Offset – If you find that once your stationery is printed the fields are not aligned properly, you may adjust the offset (inches), which will adjust the fields to properly align them on your stationery.
- Type – Use the drop down to select the item type you are adding.
- Image – Select the button. Locate the file on your computer and open.
- Fold Type – Choose the fold type for this item.
- Can Print BG – BG stands for background. If you can print the item onto a blank white piece of paper, with the image and information, you can select yes.

Step #4 – When complete, select the Save button. The item will now load on the screen.

Building your DVD Sleeve/Label

When building a sleeve/label, you need to make sure every there is a field where you want information to be printed. This will allow the system to pull the requested information to the area of the form where you have placed a field. To add a field, refer to one of the following fields types to start building:

Basic Field – This is a field that is straight text. Example: If you need the first name of the deceased, you can search (on the left side) for the word Name or First Name. Please keep in mind that some words may be different in the system than on the form. For example, the field 'Sex' is known as 'Gender' in the system.

Step #1 – Locate your field from the list and drag it onto the sleeve/label.

Category:
All
Search:
name
Alternate Name
Assigned Director - First Name
Assigned Director - Last Name
Brother - maiden name
Brother First Name
Brother Last Name
Brother Middle Name
Burial/Cremation/Disposition/Cemetery name
Contact - First Name
Contact - last name
Contact - middle name
Deceased - First Name
Deceased - Last Name
Deceased - maiden name
Deceased - Middle Name

* If you are adding a field to a prayer card with a fold, then the field may adjust itself upside down. When you print, it will place the text properly on your prayer card.

Step #2 – The text that appears within the field on the form is exactly where the text will appear when printing.

Drag the field to where you would like to place the text. If you have a section that requires more than one field (ie. First, Middle, Last name of the deceased):

- Add all three fields to the one section
- Group the three fields so they format properly and do not leave any improper spacing. Select the first field, hold the control key down on your keyboard, then select the other two fields.
- Right click on your mouse over the fields and select Group Together.
- You will see a pop up with separators. By default, it will place a space between each field. Otherwise, you have the option to separate with a comma, etc...
- Save.

Step #3 – Click on the field to resize.

The field needs to be resized to fit the enter area dedicated to the information requested on the form. To do this, click on the box that appears in the bottom right corner of the field. This will allow you to expand and reduce the size of the field.

Step #4 – Continue steps 1-3 until you have completed your first row.

When your first row is complete, adjust the alignment so the fields print out in a straight line from left to right. You will need to group all fields in that row:

- Select the first field, hold the control key down on your keyboard then select the other fields.
- Right click on your mouse over the fields and select Align Vertically.

✿ **Note:** When your form is complete, you can align all the fields on the left. Follow the same steps as above except select Align Horizontally.

Static Fields – These are fields we have added to provide certain functionality:

- Static Text – Allows you to add a new basic field.
- Static Text Block – Allows you to add a block of text.
- Prayer – Allows you to add a section for a prayer. If you are looking to add a new prayer into the database, please refer to [Manage Text/Prayers](#).
- Static Date – Allows you to quickly enter a date by using a calendar.
- Today's Date – Allows you to have the printing date auto populate to the form.
- Static Time – Allows you to have the printing time auto populate to the form.

Static Text
Static Text Block
Prayer
Static Date
Today's Date
Static Time

Photo – This will allow the primary picture of the deceased to load on the form.

- Step #1 – Search for the word photo under the All category.
- Step #2 – Locate the field called Deceased – photo and drag it onto the form.

Brand New Field – Allows you to add a brand new basic field. This is used if you cannot locate a field in our library.

- Step #1 – Right click over the section where the field needs to appear and select Add Text.
- Step #2 – The words Static Text will appear on the form. Drag the field to where you would like to place the text.

- Step #3 – Click on your field. The field needs to be re-sized to fit the enter area dedicated to the information requested on the form. To do this, click on the box that appears in the bottom right corner of the field and drag. This will allow you to expand and reduce the size of the field.
- Step #4 – Right click over the field and select Edit.
- Step #5 – The Label is the name of the field.
- Step #6 – Remove the words Static Text and Save.

It will appear as if there is no field there. If you hover over the section, you will see your new field name appear. This will allow an option to add text when you are ready to print your form.

Prayer/Poem – Allows you to insert a prayer/poem that was added to [your library](#).

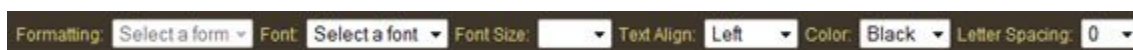
Step #1 – Right click over the section where the prayer/poem needs to appear and select Add Prayer.

Step #2 – The list of prayers/poems will appear. Click through and select the one you would like to add.

Step #3 – Drag the field to where you would like to place the prayer/poem.

Step #4 – Click on your field. The field needs to be re-sized to fit the enter area dedicated to the information requested on the stationery. To do this, click on the box that appears in the bottom right corner of the field and drag. This will allow you to expand and reduce the size of the field.

There will be formatting options available to all fields. Click on any field and adjust any one of the dropdowns (if option available).



When complete, select the Save button. Once the item is built, it will be available to print within each individual record. This will pull the necessary information from any service and place it on the form.

[<< Book of Memories Link](#)

[Print DVD Sleeves & Labels >>](#)

Print DVD Sleeves & Labels

Open a Record > Printing > DVD Sleeves and Label.

Here you will find a list of sleeves and labels. If there is no sleeve/label listed that you want to print, you will need to first [build the sleeve/label](#).

Step #1 – Select the Preview button beside the sleeve/label.

Step #2 – All of your record's information will become visible. By default, it will load the first stationery item you have uploaded.

Look for the two tabs along the left side:

- Stationery – This shows all stationery uploaded into the package. Click on any to open.
- Fields – This allows you to add any fields to the stationery item.

Step #3 – Select the Enter Data button at the bottom.

There will be two types of boxes:

- White – Information is pulled from the client editor.
- Red – Either information was not entered in the client editor or the FrontRunner system does not capture the information and it needs to be manually entered each time.

Step #4 – If there are any red boxes, remove the text and enter the information. If there are fields that do not apply to this record, leave red.



If you complete any of the red boxes with information captured in the client editor, select the Save to Record button. This will place the information in the client editor for you.

Step #5 – If there are any fields that are not formatted properly or mis-aligned, select the Modify Fields button.

This will allow you to drag fields or select a field and change the formatting by using one of the drop downs along the top of the page.

Step #6 – Before printing, select the Preview button to display how the form will appear when printed.

Step #7 – Select the Print button.

[<< Manage DVD Sleeve & Label](#)

[Manage Text / Prayers >>](#)

Manage Text / Prayers

Navigate to System Settings > Print Engine > Manage Text/Prayers.

Before building prayer cards/poems, you must scan the item (ie. prayer card) into your computer and save it as a .jpeg. It is important that your scan is as straight as possible. Once scanned into your computer, you can then upload it into the FrontRunner system.

Step #1 – Select the New button.



- Name – Enter the title of this prayer/poem.
- Text – Enter the prayer/poem.
- Category – Enter the category for this prayer/poem. Example: Catholic, Protestant, United.

As you type, it will pull a list of category names you have already entered. If this is a new category, once you enter, it will be remembered for next time.

Step #2 – When complete, select the Save button.

To edit any prayer/poem added to your library, simply click the Edit button.

[<< Print DVD Sleeves & Labels](#)

[Transfer to Disc / Media >>](#)

Transfer to Disc / Media

To transfer to a DVD, click the Download button located at the bottom of the video player. (This button is seen after generation has taken place) Click the Upgrade Free button located on the same level as the 480p quality of your video.

Click the Refresh the Page to View It link or click refresh in your browser to open the Download this Video menu.

Click on ISO (63.03Mb) – your file size may differ – to start the download process. Select Save File and save it to a location that is easily accessible. (ex. My Videos Folder or another folder you create to save your videos)



Note: Firefox Users – Once you click Save File, the file will download and there will be a pop-up message at the bottom corner of your screen to let you know when it's complete. By default, it will download to your Downloads folder. To access that folder click on the windows icon or press the windows key on your keyboard, click on your user name at the top right corner and click on the Downloads folder.

Now all you need to do is burn the disc. [Click here](#) to access the Animoto burning page. This will help you complete the process.

Memory Stick Transfer

To transfer your video to a memory stick, just click the Download button located at the bottom of the video player. (This button is seen after generation has taken place.)

Click the Upgrade (Free) button located on the same level as 480p quality of your video. This will take a couple of minutes to upgrade the quality of your video. You can then click on MP4 (26.3Mb) – your file size may vary. This will allow you to download the file to your computer. Once downloaded, you will be able to move the file to any available thumb/flash drive you have plugged into your computer.

[<< Manage Text / Prayers](#)

[Arranging Director >>](#)

Arranging Director

The features within the Arranging Director section are for those using the full management system. Search for clients or import your first calls from either ProComm or ASD.

In the Main menu at the top of your system, select Arranging Director.

The first page to open displays all **Active Clients**. The system displays At Need Contracts (ANs) and PreNeed Contracts (PNs) separately. Click on either Show ANs or PNs to display the records you need to access.

Name	Service Date	Service Time	Service Location	Date of Death	Contract No	Paid?	Funeral Director
Beaton, Mary L.	10/7/2014				99999999	N	

When searching for a particular contract, enter the deceased's last name in the search field or use either of the dropdowns to display 25, 50, 100 or All, or refine the search using the Service Date options (1, 3, 6, 9, 12, 24, or All).

The information displayed includes the name, service date, time, and location, date of death, contract number, paid status, and funeral director. To edit a contract, click on the magnifying glass to the left of the Name.

There are two ways to add a new client. From the top menu, choose one of the following:

Client Search

This tool is similar to Active Clients page but it allows you to search At Need, PreNeed, or by using the Flexible Search feature.

Navigate to Arranging Director > Clients > Client Search.

- Find At Need Client: Click on the dropdown to display all at need clients currently entered in the system.
- Find PreNeedClient: Click on the dropdown to display all preneed clients currently entered in the system.
- Flexible Search: This feature allows you to enter the information that you know, no matter how limited.

Click on Search Using Criteria.

Import First Calls

This feature allows you to import first calls from either ProComm or ASD.

Navigate to Arranging Director > Clients > Import ProComm First Calls or Import ASD First Calls.

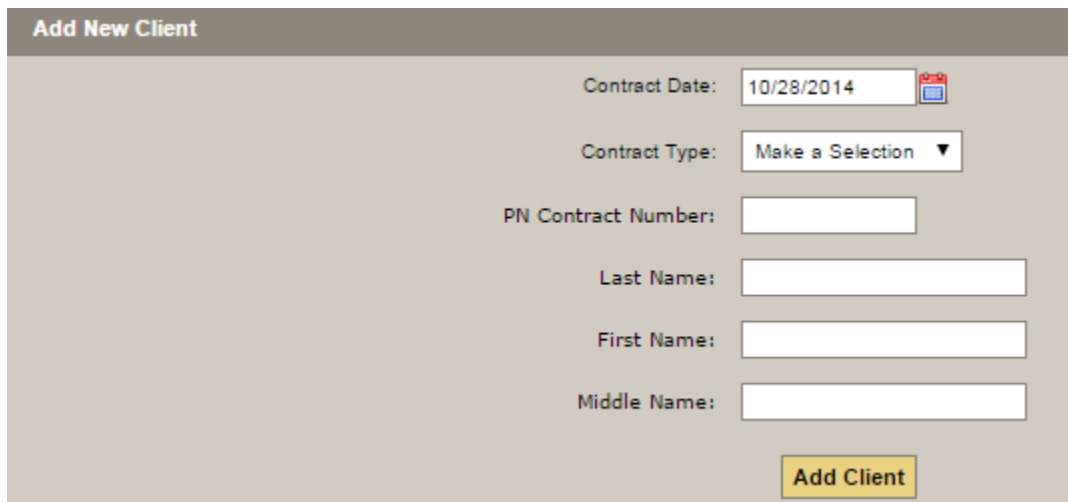
Once you select on any of the available first calls, click on the 'Import Selected Clients' button at bottom of the page.

✿ It's important to remember that existing or preneed clients already in the system should not be imported. And, once a first call is imported, it will not be available for import again.

Add New Client

There are two ways to add a new client using the Arranging Director. From the top menu, choose one of the following:

1. Arranging Director > Clients > Add New Client.
2. Main > Records > Add a New Record (button at top right of screen will direct you to Add New Client)



The screenshot shows a web form titled "Add New Client". The form contains the following fields and controls:

- Contract Date:** A text box containing "10/28/2014" with a calendar icon to its right.
- Contract Type:** A dropdown menu with the text "Make a Selection" and a downward arrow.
- PN Contract Number:** A text box.
- Last Name:** A text box.
- First Name:** A text box.
- Middle Name:** A text box.
- Add Client:** A yellow button at the bottom right of the form.

Once either option is selected, enter the information as described below and click on 'Add Client'.

- **Contract Date:** Click on the calendar icon to change the date, if necessary.
- **Contract Type:** Choose either At Need or Pre-Need
- **AN/PN Contract Number:** Click on 'Last Entered AtNeed?' or 'Last Entered Preneed?' to reveal the most recent contract number entered. This will allow you to create a sequential number.
- **At Need Service Date:** Click on the calendar icon to select a date and check the Estimated box if the date has not been confirmed.
- **Last, First, and Middle Names**

Click on the 'Add Client' button. Once the client has been added, the contract will be accessible through any of the search mechanisms on the Active Clients or Client Search pages.

[<< Arranging Director](#)

[Summary >>](#)

Summary

This section of Arranging Director provides an overview of the service information, vitals information, payment information, notes from staff, quick printing of forms, and a check list.

Open a record and navigate to Client Arrangement > Summary.

- Click on 'Show' to display more information about vitals or payments.
- Use the Notes section to add more information that may be relevant for staff accessing the client record. Once notes are added, click on 'Save Notes'.

Frequently Used Forms

This handy tool will allow you to click on any of the forms listed on the right to open a PDF.

✿ You can control what forms get listed as a frequent form. This is done through [Arranging Director Admin > Form Library Maintenance > Maintain Forms](#).

The form you open will contain any relevant information entered in the record; the form is automatically populated with information from record fields.

✿ If there are blank fields when the PDF opens, you can either go back to the record and fill in all relevant information and then reopen the PDF or you can make changes to the PDF file and sign, save, and send.

Check List

Check off any of the tasks that have been completed for this client. If you do not see a specific one required, enter it into one of the blank fields and click on the checkbox. Click on 'Save Checklist' below the list. You can control what items get listed in your check list. This is done through [System Settings > Data Setup > Quickfill & System Data > click the Check List items category](#).

Other sections within the client record:

- [Vitals](#)
- [Services](#)

- [Contract](#)
- [Contacts](#)
- [Obituary](#)
- [Account](#)
- [Add Ons](#)
- [Files](#)
- [Pre-Need Funding](#)

[<< Add New Client](#)

[Vitals >>](#)

Vitals

This section of Arranging Director provides all the vital information of the deceased.

Open a record and navigate to Client Arrangement > Vitals.



All information contained within the drop-downs is drawn from the [Quickfill & System Data](#) section of your system. Once information is entered in a drop-down field (and the record is saved), it will be added to the system data.

Client Vital Information

Enter all the client information. The more information that is added in these field, the less you will have to add in separately for the obituary, forms, stationery, and contracts.

Contract Date

Click on the calendar icon to select a date or manually enter the date: XX/XX/XXXX – Month/Day/Year

Deceased Name

The first and last names are required fields.

Fill in all other applicable fields.

Personal Details

When Male is selected, the screen turns green; when Female is selected, the screen turns pink.

Date of Birth & Date of Death – Use the calendar icon or manually enter the date: XX/XX/XXXX – Month/Day/Year When both fields are filled in, click on the calculator icon beside Age to calculate the age.

Fill in all other applicable fields.

Residence Information

Fill in all applicable fields. For those fields that contain drop-downs (City, Township, etc.), either click on the drop-down or start to type the name. If the city, for example, is already in the database, the word will appear. If not, type in the full name and once the record is saved, it will then become a drop-down option.



If a drop-down field contains incorrect information, click on the blue arrow buttons to clear the field.

Marital Status

Choose marital status and the marriage date, if applicable. Add additional information in this section if relevant.

Parent Information

Add information about both the father and mother.

Occupation Information

Click on the drop-downs to select the occupation and nature of business or type in the text. Any new fields entered will automatically populate the drop-down once the record is saved.

Education

Click on the drop-downs for the applicable education field.

Military Service

If the client was a member of the military, select 'Yes' from the Veteran drop-down. Fill in all applicable information and click on the calendar icons to choose the service entry and separation dates.

Religion and Organizations

Select the religion and church from the drop-down options or type it in manually. (Once the record is saved, any new field will populate the database)

Physician Information

Use the drop-down to access the physicians currently entered in the database. If it is not visible, type in the information. (Once the record is saved, any new field will populate the database)

Place of Death

Fill in all applicable information. Select from the drop-down options otherwise type in the information required. (Once the record is saved, any new field will populate the database)

Disposition

Choose the method of disposition and date.

Informant Details

Add the informant's name and relationship. If the informant has the same address and phone number as what's entered for the deceased, click on the 'Use Deceased's Addr and Phone Info' button to the right.



Click on Save at the top right of the screen before exiting the page.

[<< Summary](#)

[Services >>](#)





Services

This section of Arranging Director allows you to enter all the service information.

Open a record and navigate to Client Arrangement > Services.

Client Service Information

Fill in all applicable fields. Many of the sections on this page contain a location field. If the location is not contained within the dropdown, type in the name. (Use the blue arrow buttons on right to clear the field, if necessary.) Click on the calendar icon to select a date.

Service Information	
Service Type *	Memorial 
Place of Service	Kingston Memorial Centre  
	Add/Edit Addr
Service Date *	08/31/2014  Estimated: <input checked="" type="checkbox"/> No Ceremony: <input type="checkbox"/>
Service Time	<input type="text"/>

Click on the 'Add/Edit Addr' link and a pop-up will appear to include or amend the address information.

Add/Edit Location Address	
Location Name	Kingston Memorial Centre
Address	<input type="text"/>
City	<input type="text"/>
State/Province	<input type="text"/>
Zip/Postal Code	<input type="text"/>
<div><input type="button" value="Add/Edit"/> <input type="button" value="Cancel"/></div>	

Service Information

Select the service type, location, date (use the calendar icon or type in the date – XX/XX/XXXX – Month/Day/Year), and time.

Visitation

There are fields for as many as four (4) different visitations. Add the location and add/edit the address if necessary. Select the date (use calendar icon), time, and any notes if necessary.

Rosary

Add information if applicable.

Shiva or Repast

Add information if applicable.

Reception

Add location (add/edit address if necessary), date, and time of reception. If the location information is incorrectly entered, click on the blue arrow buttons on the right to clear the field.

Additional Details

Add any relevant information pertaining to this record.

Participant Details

Select from the drop-down menus or type in the applicable names. (Once the record is saved, the names will be entered in the database.)

Crematory & Cemetery

Select the name from drop-down or type in the applicable names. Select the date and fill in any other relevant details.

Funeral Director / Embalmer

Select the names from the dropdowns or type directly into the field. Add the license numbers. Click on the blue arrow buttons to clear the field.



Once information is added, click on Save at top right of the screen.

[<< Vitals](#)

[Contract >>](#)

Contract

This section of Arranging Director allows you to add products and services for the contract.

Open a record and navigate to Client Arrangement > Contract.



All information contained within the dropdown menus of the Contract page has been entered in the system's settings. Before information can populate contracts, it must be entered in [System Settings > Catalogs > Products](#) and [System Settings > Pricing Setup > Package Pricing](#).

Most of the information for this first section is already populated. Click on the calendar icon to populate the 'Unpaid Balance Due By' field.

Date of Service: 08/31/2014

Estimated Date: ☒

Unpaid Balance Due By















Contract Date: 08/27/14

Contract Type: At Need

Services

- Select a specific package from the dropdown menu (pulls information from [System Settings > Pricing Setup > Package Pricing](#)).
- The white pricing fields are editable. Edit any of the pricing information if needed.
- Click on the green + icons to add items to any of the sections (Professional and Staff Services, Care and Preparation of Remains, etc.)
- Once all services (and prices) have been added, the total services displays at the bottom of the Services section.

Merchandise

MERCHANDISE				
Merchandise - From Inventory				
Casket - From Inventory	 	<input type="text" value="0.00"/>		
Outer Burial - From Inventory	 	<input type="text" value="0.00"/>		
Urns and Vases - From Inventory	 	<input type="text" value="0.00"/>		
Clothing - From Inventory	 	<input type="text" value="0.00"/>		



There are two sections for each type of merchandise: inventoried and not inventoried. Choose merchandise from the applicable category.



To keep track of inventory, all can be managed through [System Settings > Arranging Director Admin > Inventory Control](#).

All merchandise contained within System Settings > Catalogs > Products can be added to the contract by clicking on the brown file icon located beside each category. A pop-up will appear that includes all available merchandise.

Choose a Product			
List of Caskets in Inventory			
<input type="button" value="Select"/>	Golden Harvest		
Bronze Color 18 Gauge			
Supplier:	Subcategory: Metal Caskets	Price: \$2500.00	
Date Ordered: 06/02/14	Date Received: 06/04/14	Serial Number: 0	
<input type="button" value="Select"/>	King Oak		
Hardwood with crepe interior.			
Supplier: Matthews	Subcategory: Wooden Caskets	Price: \$9999.00	
Date Ordered: 06/04/14	Date Received: 06/05/14	Serial Number: 0	

Scroll through the list to find the applicable product and click on Select  . Repeat the process until all merchandise is selected. The Total Merchandise price is visible at the bottom of the Merchandise section.

Disbursements

- The white pricing fields are editable. Edit any of the pricing information, if needed.
- Click on the green + icons to add items to any of the sections.
- Once all disbursements (and prices) have been added, the total disbursements displays at the bottom of the Disbursements section.

Tax Summary

The tax rate for a particular record can be adjusted manually for each contract. To set up the tax rates to apply to all contracts, refer to [System Settings > Arranging Director Admin > Contract Maintenance > Sales Tax Setup](#).

Contract Summary

This section of the contract displays the total charges prior to any discounts. Click on the dropdown to access the reasons for a discount or type it in and enter any notes. Enter the dollar amount of discount.

Contract Total

Add any assignments for this contract and check off all payment options offered by your firm. Enter any notes.

Select legal, cemetery or crematory requirements which were explained to the client

Click on any / all that apply to this contract.

Select legal, cemetery or crematory requirements which were explained to the client:

- ☐ Cemetery requires outerburial container.
- ☐ Family requested outerburial container.
- ☐ Funeral Home requires embalming for public viewing.
- ☐ Embalming is expressly requested by the applicant or family for the funeral services selected.
- ☐ Company policy requires embalming for mausoleum entombments.
- ☐ Refrigeration is required after 24 hours from death, when there is no embalming.
- ☐ Embalming is required for out-of-state shipment by common carrier.
- ☐ Airline requires remains to be in an Air Tray.
- ☐ Crematory requires remains to be in a rigid, combustible container.

Buyer Information

If the buyer is the same as the informant for this particular record, click on 'Use Informant Info' to populate the fields. If not, enter the information and select whether the buyer is the next of kin.



Once any information is added (or edited) to the contract, click on Save at top right.

[<< Services](#)

[Contacts >>](#)

Contacts

This section of Arranging Director allows you to add information for necessary contacts.

Open a record and navigate to Client Arrangement > Contacts.





The screenshot shows the 'Client Contacts' interface. At the top left, the title 'Client Contacts' is displayed. In the top right corner, there is a blue circular help icon with a question mark and a yellow button labeled 'Add A Contact'. The main area contains three text input fields. The first field is titled 'Additional Survivor Information' and has a yellow button labeled 'Save Addl Survivor Info' below it. The second field is titled 'Additional Preceded In Death Information' and has a yellow button labeled 'Save Addl Predeceased Info' below it. The third field is titled 'Additional Pallbearer Information' and does not have a visible save button. Each text field has a small diagonal icon in its bottom right corner.

The main page provides fields for additional information as it relates to survivors, preceded, and pallbearers. Once the information is added, click on the 'Save' button below corresponding field.

To create a new contact, click on the 'Add A Contact' button at top right. It's important to designate the contact as one of the following:

- Next of Kin (NOK)
- Primary Buyer
- Informant
- Executor
- Beneficiary
- Survivor
- Pre-Deceased

- Pallbearer
- Additional Buyer / Receive Invoices

Add Contact	
Name	Title <input type="text"/>
	First <input type="text"/> Middle <input type="text"/>
	Last <input type="text"/> Suffix <input type="text"/>
	Maiden/Last Name at Birth <input type="text"/>
Gender	<input type="text"/>
Relationship	<input type="text"/>  
	<input type="checkbox"/> NOK <input type="checkbox"/> Primary Buyer <input type="checkbox"/> Informant <input type="checkbox"/> Executor <input type="checkbox"/> Beneficiary <input type="checkbox"/> Survivor <input type="checkbox"/> Pre-Deceased <input type="checkbox"/> Pallbearer <input type="checkbox"/> Addl Buyer/Receive Invoices
Address Use Deceased's	Street <input type="text"/>
	City <input type="text"/> State <input type="text"/>
	Township <input type="text"/> County <input type="text"/>
	Zipcode <input type="text"/> Country <input type="text"/>
Contact Phone #1	<input type="text"/> Type <input type="text"/>
Contact Phone #2	<input type="text"/> Type <input type="text"/>
Email Address	<input type="text"/>
SSN	<input type="text"/>
Date of Birth	<input type="text"/>  Date of Death <input type="text"/> 
Place of Birth	City <input type="text"/> State <input type="text"/>
	Country <input type="text"/>
Notes:	<input type="text"/>
<input type="button" value="Add Contact"/> <input type="button" value="Cancel"/>	

If the deceased and new contact shared the same address – click on the ‘Use Deceased’s’ button to populate the fields. Click on the calendar icon for the Date of Birth and Date of Death or enter the information: XX/XX/XXXX – Month/Day/Year.

Scroll to the bottom of the page to click on the ‘Add Contact’ button.

[<< Contract](#)

[Obituary >>](#)

Obituary

This section of Arranging Director allows you to create an obituary.

Open a record and navigate to Client Arrangement > Obituary.

To create the obituary for a record, choose Default 1 or if you have created your own template(s). If you want to create your own obituary templates, you can do so from [System Settings > Data Setup > Obituary Templates](#).

The Default 1 feature pulls information from the record to populate a basic template. Any missing information from the record will be indicated by () X (). Simply type in the replacement text, edit any of the information, and click on 'Save' at the top right.

The character and word counts are located below both the template editing space.

Available Templates

Default 1

Don't Forget to Save Your Changes!

Stephanie () X () Montroy age , of in passed away at .

A native of , she was the daughter of and . Montroy was a veteran of the . his service record included .

Survivors include .

The family will receive friends from to at . Funeral Services will be held Wednesday, October 29th, 2014 at in , with burial to follow at in , .

Stephanie () X () Montroy was employed with as a .

Pallbearers for the service are .

Stephanie () X () Montroy was involved with .

Donations can be made to .

Name of Funeral Home One is in charge of arrangements for Stephanie () X () Montroy .

652 characters | 93 words

- ✿ Once the obituary is saved, a new message will appear at the top of the page: Obituary Successfully Updated. Web Data Successfully Updated. The obituary will then be visible on the Book of Memories.

As long as you have an email address entered within [System Settings > Arranging Director Admin > Obituary Setup > Email Address\(es\) to Use for Obituary Communications](#), you have the option to email this obituary. Click the 'Email Obituary' button. The primary photo you have selected for this record will also be emailed.

- ✿ You can email the obituary to the family first to get their approval before sending to the newspaper. You can also save the family's approval email by uploading it into the [Files](#) section.

[<< Contacts](#)

[Account >>](#)

Account

This section of Arranging Director summarizes the contract pricing, incorporating adjustments, discounts, and refunds.

Open a record and navigate to Client Arrangement > Account.

Client Account Entry Information

Contract Total: \$0.00

Add On Total: \$0.00

Less Contract Discounts: -\$0.00

Less Add On Discounts: -\$0.00

Total Price: \$0.00

Total Price: \$0.00

Paid, Adjustments & Discounts: -\$0.00

Refunded: +\$0.00

Late Payment Fees: +\$0.00

Total Amount Due: \$0.00

Add An Entry

Date	Pay Method/ Ch. No.	Amount	Applied To	Received From/Reason	Entry Type
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Internal Use Account Notes

Update Notes

Print Account Summary


Manually Archive Account

Write Off Account


If, for example, a payment is made to this account, click the 'Add An Entry' button. A pop-up will appear to enter the information. The Entry Type drop-down displays the various options:

Add Entry

Date




Entry Type



Apply Payment To:

Contract

Payment Method




Check/Transaction No.


Amount \$

Received From/Reason

Receipt Number & Date



Deposit Number & Date



Check/Trans No is not encrypted in the database - do not enter Credit Card info.

Add Entry

Cancel

- Payment
- Down Payment
- Refund to Family
- Needy Family Discount
- Insurance Funding Fee
- PreNeed Discount
- Early Payment Discount
- Other Discount
- Adjustment
- Collection Agency Fee
- Late Fee

Once the entry is complete, click on the 'Add Entry' button at the bottom right.



The Check/Cheque / Transaction Number is not encrypted in the database. Do not enter confidential information (including credit card details).

Once an entry is added, the information will display below with the options to delete, edit, and print.

Date	Pay Method/ Ch. No.	Amount	Applied To	Received From/Reason	Entry Type	
08/30/14	Check #123456789	\$500.00	Contract	James Jones	Down Payment	  

Enter any additional notes related to this record and click on the 'Update Notes' button. The summary can also be printed. And, to categorize the account as a write-off, click on the 'Write Off Account' button. A pop-up will appear to confirm the action.

[<< Obituary](#)

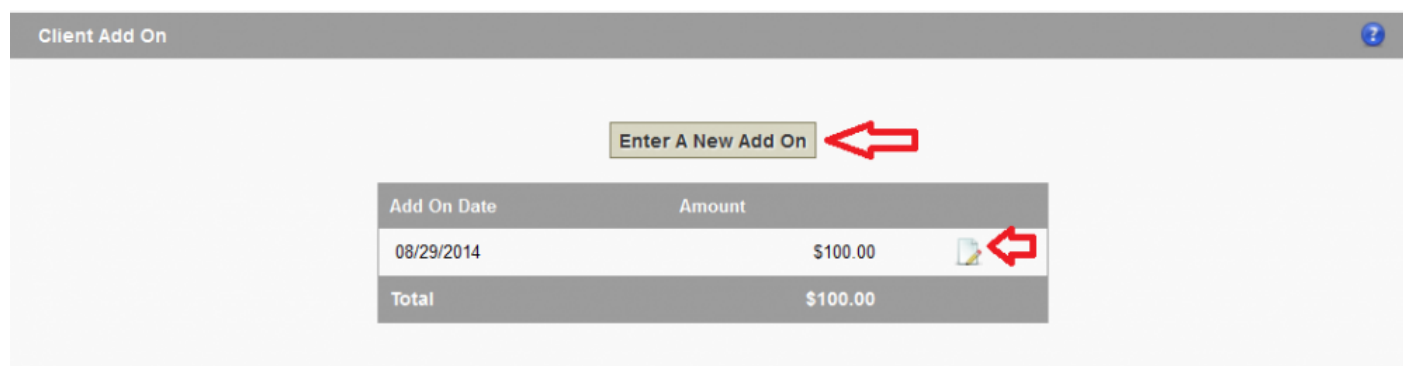
[Add Ons >>](#)

Add Ons

This section of Arranging Director allows you to create another contract for this client record.

Open a record and navigate to Client Arrangement > Add Ons.

All Add Ons will be displayed. To create a new one, click on the 'Enter A New Add On' button.



Add On Date	Amount
08/29/2014	\$100.00
Total	\$100.00

All available contract information will display. Scroll through the options and enter a dollar amount for any add ons that are required.



For further information on how to add products/services, see the [Contracts](#) section of a record.

As you scroll, the Update-Values button on the right side of the screen will also scroll. It's important to update any new information immediately after it's entered. A pop-up will appear to indicate that the update is successful.

Scroll further down the page to confirm the Add On information is correct and then add the Buyer Information if required.

[<< Account](#)

[Files >>](#)

Files

This section of Arranging Director allows you to attach files to this client record.

Open a record and navigate to Client Arrangement > Files.

Click on the '+Add A File' button at top right. A pop-up window will appear to browse to the file (no larger than 3 MB) on your computer. Click 'Find File' and then add a File Name and Description. Click on Upload Document.

Add Document

File to Upload:

Find File

(3 MB max)

File Name:

Description:

Upload Document

Cancel

The new file will display in the chart below with the options to view, delete, and edit the file name and description.

[<< Add Ons](#)

[Pre-Need Funding >>](#)

Pre-Need Funding

This section of Arranging Director allows you to add a financial transaction for a pre-need account.

Open a record and navigate to Client Arrangement > Pre-Need Funding.

Click on the 'Add A PreNeed Funding Entry' button. Enter all applicable information and click on the 'Add Funding' button at bottom right. The entry information will then display in the table below with the ability to delete or edit. If any information needs to be changed, click on the 'Edit Funding' button at bottom right.

Edit PreNeed Funding Entry	
Date Paid	<input type="text" value="08/29/14"/>
Check Number	<input type="text" value="987654321"/>
Received From	<input type="text" value="Sue Jones"/>
Depository	<input type="text" value="Pinnacle Bank"/>
Type:	<input type="text" value="Inflation Proof - Insurance Funded"/>
Account/Policy #	<input type="text" value="147852369"/>
Amount \$	<input type="text" value="1000.00"/>
Is this an Interest Amt?	<input type="text" value="No"/>
Is this a Policy Amt Increase?	<input type="text" value="Yes"/>

In the table, the Type can be displayed one of four ways: S/I – Standard Insurance; S/T – Standard Trust; I/I – Inflation Insurance; or I/T – Insurance Trust.

[<< Files](#)

[Record Management >>](#)

Record Management

This section of Arranging Director allows you to manage donations, edit the family login information, and set the file number, publish status, and current/past settings.

Open a record and navigate to Record Management.

- [Donations](#)
- [Family Interactive](#)
- [File Management](#)

[<< Pre-Need Funding](#)

[Donation >>](#)

Donation

This section of Arranging Director allows you to set up the charities for a record.

Open a record and navigate to Record Management > Donations.

Please refer to another section in our manual called [Add Charitable Donations](#) for information on how to use the feature.

[<< Record Management](#)

[Family Interactive >>](#)

Family Interactive

This section of Arranging Director allows you to create the family with a login to access their loved one's Book of Memories and the family email addresses.

Open a record and navigate to Record Management > Family Interactive.

Please refer to another section in our manual called [Family Login](#) for information on how to use the feature.

[<< Donation](#)

[File Management >>](#)

File Management

This section of Arranging Director allows you to add or edit the file number, force a record to be current, publish or unpublish a record from the website, and post a record to your Facebook page.

Open a record and navigate to Record Management > File Management.

The page provides easy access to the record's main settings:

- File Number: The system automatically creates a file number. This can be left as is or edited.
- Current / Past: All records are categorized according to the date of death. If, for example, a person's memorial is held long after the date of death, the record can be forced to be current so it sits on your website as a current service. Once the memorial is over, it's important to adjust this setting back to Automatic.
- Publish to Web: When the record is ready to publish to the Book of Memories, set to Yes.
- Post to Facebook – If your firm has a Facebook account and the [set up is complete](#), the app can be integrated within the FrontRunner system to ensure that when a Book of Memories goes live, the link to it will post to your Facebook page. If you do not app this app and would like more information, please [contact your Success Coach](#).

FRP Management			
File Number:	<input type="text" value="2014-10-27"/>	Publish to web:	<input type="text" value="Yes"/>
Current / Past :	<input type="text" value="Automatic (based on date of service / vi"/>		

[<< Family Interactive](#)

[Book of Memories >>](#)

Book of Memories

This section of Arranging Director will help your firm learn how to personalize each Book of Memories and explain to families how the features work.

Open a record and navigate to Book of Memories.

Please refer to another section in our manual called [Book of Memories](#) for information on how to use the feature. From this page will be sub-section explain each feature.

[<< File Management](#)

[Financials >>](#)

Financials

This section of Arranging Director allows you to setup your financials.

Navigate to System Settings > Financials.

- [Account Register](#)
- [Reconcile Account](#)
- [Account History](#)
- [QuickBooks Export](#)
- [Invoices](#)
- [Enter P/N Interest](#)

[<< Book of Memories](#)

[Account Register >>](#)

Account Register

This section of Arranging Director allows you to enter, delete, edit, print and view the details of your checks and deposits.

Navigate to Arranging Director > Financials > Account Register.

Date	No.	Payable To/ Deposit From	Delete/ Edit ?		QB Export?	Deposit Amount	Check Amount	Balance	
								\$4500.23	

Adding checks and deposits are self-explanatory for the most part.

Adding Checks

Click 'Add a New Check'. Add the check/cheque number, date, amount, and the payee information. Click 'Add Check' when done.

The next check and deposit number available are filled in for you. You may override these values but you may not enter a duplicate a number. You can change the next check or deposit number to use under [System Settings > Arranging Director Admin > Set Last Check or Deposit Number Used](#).

If you need to **Void a check**: edit the check and change the Payee to Void and the amount to 0.00.

Deleting a check removes the check from the database which allows you to reuse the check number.

[<< Financials](#)

[Reconcile Account >>](#)

Reconcile Account

This section of Arranging Director allows you to reconcile or balance your account.

Navigate to System Settings > Financials > Reconcile Account.

When you choose to reconcile, or balance, your account you will be presented with the following screen:

Last Balanced On: 02/01/09
Opening Balance: \$4500.23
Ending Balance: \$ 0.00
Service Charge: \$ 0
Check Printing Charge: \$ 0
Balance Account

Select 'Balance Account' after you enter the appropriate data.

BALANCE HISTORY

Last Balanced On: 02/01/09 Opening Balance: \$4500.23 Ending Balance: \$0.00

RUNNING TOTALS

Deposits: \$0.00 Checks: \$0.00 Remaining to Clear: \$4500.23

Balance Complete **Postpone** **Add A New Deposit** **Add A New Check**

Date	No.	Payable To/ Deposit From	Clear	Deposit Amount	Check Amount	Balance
		Opening Balance				\$4500.23
12/31/09			<input type="checkbox"/>			\$4500.23 details

If you Opening Balance or Last Balanced On date is incorrect you may modify it under [System Settings > Arranging Director Admin > Set Account Last Reconciled Date and Current Balance](#).

Check the boxes in the “Clear” column for each transaction. The running totals will update as you select transactions.

You may edit or delete transactions and also view the full details of the transactions.

You may add new deposits and checks during your reconciliation without losing your progress. To postpone your reconciliation until a later time click the 'Postpone' button and your progress will be available when you return to finish your reconciliation.

Click 'Balance Complete' when you are done.

[<< Account Register](#)

[Account History >>](#)

Account History

This section of Arranging Director shows all uncleared transactions and any transaction less than two months old.

Navigate to System Settings > Financials > Account History.

Enter Search Parameters: (You may enter values or any or all fields.)

Transaction Type : ☐ Checks ☐ Deposits ☐ Both



Transaction Number:

Payable To/Deposit From Contains:

Amount Equals: \$

Cleared Status: ☐ Cleared ☐ Not Cleared ☐ Both

Any Expense Category Contains:

Transaction Dates: Beginning  Through 

You can view the details of each transaction and perform a flexible search for a particular transaction or transactions.

[<< Reconcile Account](#)

[Invoices >>](#)

Invoices

This section of Arranging Director allows you to print invoices for any outstanding payments.

Navigate to System Settings > Financials > Invoices.

Create Selected Invoices

Create Address Mail Merge

[HELP! My invoices won't print!](#)

Visit the [Invoice Text Maintenance](#) page to modify the text and signature that appear on the invoices.

OPEN ACCOUNTS
Sorted by Ascending Name

(Click on a column header to sort. Hold the Shift Key down to sort by multiple columns.)

Select All		Deceased's Name	Contact's Name	Contact Type	Contract No	Contract Date	Last Payment Date	Last Payment Amount	Balance
<input type="checkbox"/>		Crosby, Ellen Jane		Buyer	233223	07/08/2014			\$3644.00
<input type="checkbox"/>		Lo Faso, John		Buyer	9999	08/01/2014			\$8095.00
Total Outstanding Amount Due = \$11,739.00								\$11,739.00	

Create Selected Invoices

Create Address Mail Merge

[HELP! My invoices won't print!](#)

Check the boxes next to the invoices you wish to print and click the 'Print Select Invoices' button. This will generate a PDF letter for each client which you may print using your browsers Print function. The list of individuals are the Buyers for each client and any additional contacts defined to receive invoices. The possible additional recipients are setup and maintained under each client's [Contact](#) tab.

The text of the invoice letter is based on the age of the last payment on the account. You can modify your text, as well as the signature line, via [System Settings > Data Setup > Invoice Setup](#) or by clicking the "Invoice Text Maintenance" link on top of the page. After the text of the letter each invoice will include an account summary.

You may define the format of the header of the invoice letters to print the address so that it will be visible in a standard two-window envelope or for use with a plain front envelope. You define the layout setting under [System Settings > Data Setup > Invoice Setup](#). Make your selection from the drop down for "Type of Envelope Used for Mailing".



If you have trouble printing your invoices make sure that you have the latest version of Adobe Reader installed on your computer and that you are allowing pop ups from this site with ALL your pop up blockers.

[<< Account History](#)

[Inventory >>](#)

Inventory

This section of Arranging Director allows you to setup your products and inventory control features.

Navigate to System Settings > Inventory.

- [Products](#)
- [Inventory Control](#)

[<< Invoices](#)

[Products >>](#)

Products

This section of Arranging Director allows you to setup your products.

Navigate to System Settings > Inventory > Products.

Please refer to another section in our manual called [Product Database](#) for information on how to use the feature.








[<< Inventory](#)

[Inv. Control >>](#)





Inv. Control

This section of Arranging Director allows you to setup your products.

Navigate to System Settings > Inventory > Inventory Control.



Current Products	Category	Subcategory	Qty		
Casket					
Cameo Rose	Casket-Inventoried	18-Gauge	0	details	   
Camry	Casket-Inventoried	18-Gauge	8	details	   

This screen shows you a list of you Product Catalog and the current count in inventory for each product. This is the main control screen to maintain your inventory. Use the [Product Database](#) screens to change the details of a product. The Inventory Control Icons are:

-  Receive inventory
-  View/edit existing inventory
-  Delete inventory
-  Transfer inventory item

Receive Inventory

When you choose to receive inventory you will be asked for the quantity and pricing details for the operation. After you add the items you will be given the opportunity to assign serial numbers.

Cameo Rose	
18 Gauge Steel with Ice Pink Velvet Interior - 4507083	
Category: Casket-Inventoried	Current Retail Price: \$ 1995.00
SubCategory: 18-Gauge	Current Cost: \$ 0.00
Supplier:	
	Quantity: <input type="text" value="0"/>
Date Ordered: <input type="text"/> 	Retail Price: \$ <input type="text" value="1995.00"/>
Date Received: <input type="text"/> 	Cost: \$ <input type="text" value="0.00"/>
<input type="button" value="Cancel"/> <input type="button" value="Add Item(s)"/>	

View/Edit Inventory Details

You may edit the Date Ordered, Date Received, Retail Price and/or Cost for all selected product currently in stock and unassigned to a client.

Select Inventory to Delete

When you click this icon you will be allowed to select which inventory items or items to delete of this product.

Transfer Inventory Item

The funeral homes involved in the transfer must have each other defined as transfer locations. These are set under [System Settings > Arranging Director Admin > Inventory Transfer > Maintain Inventory Transfer Locations](#).

The transfer occurs based on the data in both funeral homes' [Product Database](#). If both funeral homes have the EXACT matching Product Name, Category and Subcategory then the item is transferred directly. If there is not an exact match you have two options. Option one is to add the sending funeral homes' details for that product to the receiving funeral homes' product database and transfer the item. Option two is to select a product from the receiving funeral homes' product database and transfer the item as that selected product.

[<< Products](#)

[Forms >>](#)

Forms

This section of Arranging Director allows you to quickly print forms for a client record.

Navigate to Arranging Director > Forms.

The forms menu shows all of the forms that have been set to be visible and are therefore available for your funeral home's use. The forms and their visibility are maintained by the funeral home and company-wide administrators via [System Settings > Arranging Director Admin Form Library Maintenance > Maintain Forms](#).

Form Menu	Client Scrn	Form	Category	Owner
<input type="checkbox"/>	<input type="checkbox"/>	Canada - At Need Contract	Canada	System
<input type="checkbox"/>	<input type="checkbox"/>	Canada - Notification of Death	Canada	System
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Canada CPP Death Benefit Application	Canada	System

To create a form you simply click the form name. When a form is selected, use the dropdown to select the client record. When the form opens you may edit any information that is pre-filled on the form and fill in any other blank fields before printing. Use the File > Print functions from your browser to print the form.



Data changed or added on a form is NOT saved in the database. To permanently modify some client data, use the client information editing screens.

[<< Inv. Control](#)

[Reports >>](#)

Reports

This section of Arranging Director allows you to view from a selection of tabular reports, charts and graphs.

Navigate to Arranging Director > Reports.

- [Tabular Reports](#)
- [Charts & Graphs](#)

[<< Forms](#)

[Tabular Reports >>](#)

Tabular Reports

This section of Arranging Director allows you to view and/or print from a selection of tabular reports.

Navigate to Arranging Director > Reports > Tabular Reports.

Check the boxes next to the reports you wish to run and click 'Create Report(s)'. Date and contract number dialog boxes will open if one of the reports you select need that data to run. All reports selected will use the same criteria you enter. If you want different criteria for the various reports you must run them another time entering the different reporting parameters.

Report Menu

Create Report(s)

REPORTS

Enter reporting range for date based reports:
From: 12/01/2014 To: 12/11/2014

Financial	Sales	Contacts
<input type="checkbox"/> Accounts Receivable	<input checked="" type="checkbox"/> Sales Report	<input type="checkbox"/> Cemeteries
<input type="checkbox"/> Account Adjustments & Discounts	<input type="checkbox"/> Consolidated Sales	<input type="checkbox"/> Crematories
<input type="checkbox"/> Audit Report	<input type="checkbox"/> Sales Tax	<input type="checkbox"/> Hairdressers
<input type="checkbox"/> Payments Made (by Date)	<input type="checkbox"/> Sales by Director	<input type="checkbox"/> Ministers/Clergy



This section will not go over each report in detail. The most effective way to learn about each report is to run it.

When the reports appear you may notice black arrows in the column headings. These arrows indicate the ability to sort the report by the column data. To sort by multiple columns simply hold down the Shift key while you select the columns.



Please [contact your Success Coach](#) if you would like a report that is not on the menu and we will consider adding it.

Printing Reports

Although it is possible to print the reports by printing the screen, you should create and print the PDF version since it will be correctly and beautifully formatted for you. To generate the PDF for printing first modify the sort order of the reports , if desired, and then click the PDF generation icon at the top right of the screen. A new window will open with your PDF document. Print the report(s) by choosing File > Print in your browser window.

Requested Reports

?

**Embedded Halcyon Stage
Sales**

Date of Service and Add On Dates From 12/01/2013 To 12/11/2014
Sorted by Ascending Service Type, Date

CONTRACT SALES

ANS15984 12/19/13

Stoness,
Bruce
Banner

Troubleshooting

If you cannot get your reports to work there are a couple things to check. Most likely the problem is due to having an old or no version of Adobe® Reader on your computer and/or problems with pop up blockers. Since the reports open in a new window you may have problems running them if you have a pop-up blocker or blockers enabled for this site.

[<< Reports](#)

[Charts & Graphs >>](#)

Charts & Graphs

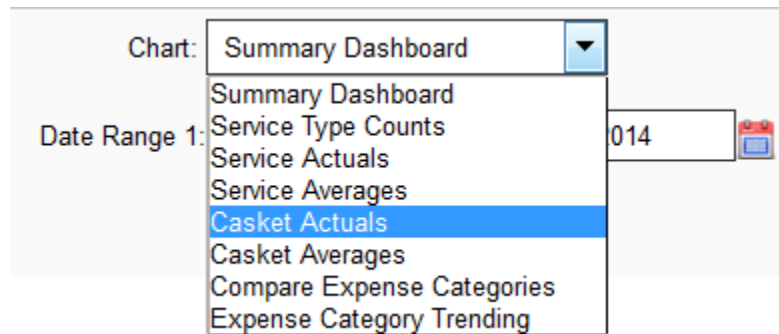
This section of Arranging Director allows you to view from a selection of charts and graphs.

Navigate to Arranging Director > Reports > Charts & Graphs.

The first screen that appears is an overview screen. The dates default to the last twelve months. You may change the date range of the data by modifying the dates in the Date Range 1 fields and clicking 'Update Chart'.

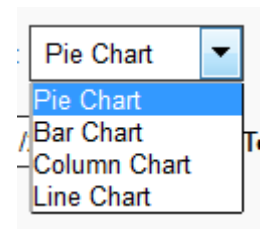


If you want to view another chart in the library simply choose another chart from the Chart dropdown.



You will have the ability to enter values for different fields depending upon what is required for a particular chart. If a chart compares values over two different date ranges you will be allowed to enter dates for both ranges.

You may also control the chart type used to represent your data. You may select from Pie Charts, Bar Charts, Column Charts or Line Charts. The most appropriate chart to use will depend on the data. Rolling over the different sections of the charts and graphs will give detailed information where available.



[<< Tabular Reports](#)

[Timesheets >>](#)

Timesheets

This section of Arranging Director allows you to access and maintain all timesheet information for all employees.

Navigate to Arranging Director > Timesheets.

The screenshot displays three panels in the Timesheets interface:

- Timesheet Maintenance:** Includes a date picker for "Enter the Starting Date of the timesheet you would like to add, view or edit:", an employee selection dropdown for "Select an Employee:" (currently showing "Beaton, Mary"), and a "Select" button.
- Pay Period Administration:** Displays "Your defined number of weeks in a pay period is 2." and a date picker for "Select Pay Period Week Start:". It includes buttons for "View Pay Period", "Lock User Edits", and "Lock and Submit".
- View Annual History:** Shows "Current Year: 2014", an employee selection dropdown for "Select an Employee:" (currently showing "Beaton, Mary"), a checkbox for "Show Previous Year", and a "View Details" button.

* Admins will see the following screen via their Timesheet Menu option.

Timesheet Maintenance

Enter the starting date of this timesheet and select the employee. Add or edit data at any time. An informational message will appear if the timesheet has been previously submitted but Admins will still have the ability to edit the data.

Pay Period Administration

The 'View Pay Period' option will show you all timesheets entered for your selected pay period.

The employees Regular ®, Overtime (O), Sick (S), Vacation (V) and Holiday (H) hours will be detailed. The annual time off summary will follow the pay period history section. The Earned hours are obtained from the values entered for the employee via [Data Setup > Employee Maintenance](#). The used hours are calculated from past timesheets.

After the employee's name there may be an icon. The 'envelope with arrow' icon indicates that this week has been previously submitted. The 'lock' icon indicates that the timesheet has been locked against employee/non-administrator edits but it has not been submitted yet.

The Print button will create a PDF document of the current pay period and time off summary.

'Lock User Edits' prevents employees from editing previously added timesheets. Use this if you are not ready to email your timesheets but you wish to disable edits.

When you are ready to email your timesheets to whoever you have designated in your setup, ([Admin > Setup Timesheet Values](#)) simply select the pay period and click the 'Lock and Submit' button. The timesheets for this pay period will be emailed and the timesheets will no longer be editable by non-administrators.

[<< Charts & Graphs](#)

[Data Setup >>](#)

Data Setup

For the Arranging Director, please refer to the items below to learn more about your Data System Setup.

- [Quick Fill & System Data](#)
- [Employee Maintenance](#)
- [Obituary Template](#)
- [Invoice Setup](#)
- [Check Setup](#)

[<< Timesheets](#)

[Quick Fill & System Data >>](#)

Quick Fill & System Data

This section of Arranging Director allows you to complete a text of values to help speed up data entry.

Navigate to Arranging Director > Data Setup > Quick Fill & System Data.

Quick Fill Data Categories

Add items to a pick list. Within a client record, the pick list will automatically be narrowed down by the matching text as it's typed. If there is no match, the item will automatically be added to the category. These do not need to be added in setup; there is an option to add them as needed from within the record.

Static System Data Categories

A pre-set list of values.



As these values are not automatically added to the lists when they are entered within a record and must be and maintained via this area, make sure to check each category and add values during the setup process.

Two important static Quick Fills are the *Other Service Items* and *Other Cash Advance/Disbursement Items*. They are used to populate the dropdown box on a client contract to add additional line items to a contract.

Adding a Quick Fill Item

Click on a category. Click the green + icon to add an item. Enter all of the information and click 'Add' when done. Once added, there are options to remove or edit.

Current Cemeteries		
Cataraqui Cemetery	details	



Deleting and editing the Quick Fill and Static System list values has no effect on data previously entered on forms. It only affects the values that will appear in the dropdown lists in the future. You may wish to perform periodic housekeeping and delete infrequently used values that were automatically added to the lists by the Quick Fill Auto Add feature.

[<< Data Setup](#)

[Employee Maintenance >>](#)

Employee Maintenance

This section of Arranging Director allows you to enter the data for each of your employees.

Navigate to Arranging Director > Data Setup > Employee Maintenance.

This information is used for general contact information and with the [timesheets](#).

Click the green 'Add New +' button. Enter the information about the employee.

For each employee, enter the sick, vacation and holiday hours earned/available for the current year. These values will be used in conjunction with the timesheets entered to determine the remaining hours on the Employee Attendance Detail report. The values should be the hours the employee has remaining at the time the timesheet feature is first used for the current year. For example, if an employee gets 40 hours of vacation hours each year and they have already taken 8 hours as of the date the timesheet feature is first used, enter 32 hours for this employee's available vacation hours.

Click the 'Add' button when done. Once added, there will be options to delete or edit.

Current Employees		Add New: 	
Beaton, Mary			 

Once a user is added, go to the [Maintain Users](#) section and finalize the set up.

[<< Quick Fill & System Data](#)

[Obituary Template >>](#)

Obituary Template

This section of Arranging Director allows you to create your own obituary templates to speed up the obituary creation. The templates provide starting points for an obituary that can be modified and saved for each individual.

Navigate to Arranging Director > Data Setup > Obituary Templates.

Click the 'Add Template' button. Enter a template name.

Vitals:	Service Information:	Template Name: <input type="text"/>
<ul style="list-style-type: none"> Title First Name Middle Name Last Name Suffix Nickname KnownAs-FullName Maiden He-She he-she his-her him-her son-daughter Date of Birth Date of Death Age 	<ul style="list-style-type: none"> Service Type Place of Service Date of Service Service Time Visitation 1 Place Visitation 1 Date Visitation 1 Start Time Visitation 1 End Time Visitation 1 Notes Visitation 2 Place Visitation 2 Date Visitation 2 Start Time Visitation 2 End 	<div></div>

To create the obituary text body, simply enter the text you would like to appear. Wherever client information needs to appear in the body, just click on the name of the field from the lists on the left and it will automatically be placed at the current cursor position. The field name will appear with double percentage characters around the name.



Do not remove the percentage marks since these are the characters used to determine where client information should be substituted when the client's obituary text is auto-generated.

Template Name:

%%Title%% %%First Name%% %%Middle Name%% %%Last Name%% passed away on
%%Date of Death%%.

Click 'Add Template' when done. Once done, there will be options to delete or edit.

[<< Employee Maintenance](#)

[Invoice Setup >>](#)

Invoice Setup

This section of Arranging Director allows you to define the text that is used with the invoice creation utility.

Navigate to Arranging Director > Data Setup > Invoice Setup.

Select the type of envelope used for mailing, who the invoice is signed by, and the title of that person.

Enter data for the text of each letter, which is based on the last payment date. The time periods are 0-29 days, 30-59 days, 60-89 days and more than 89 days.

[<< Obituary Template](#)

[Check Setup >>](#)

Check Setup

This section of Arranging Director allows you to define the horizontal and vertical printing position of each data item on the check/cheque when using this system to print the check/cheque.

Navigate to Arranging Director > Data Setup > Check Setup.

Enter the horizontal and vertical offsets for each items. This is necessary to account for the differences in printers and checks/cheques used. It may take some trial and error to ensure the checks/cheques print correctly.

Print A Test Check

Offset Values		
Field Name	Horizontal Offset	Vertical Offset
Date	<input type="text" value="178"/>	<input type="text" value="34"/>
Amount	<input type="text" value="178"/>	<input type="text" value="46"/>
Amount In Words	<input type="text" value="18"/>	<input type="text" value="54"/>
Payable To	<input type="text" value="28"/>	<input type="text" value="46"/>



To avoid wasting checks/cheques while setting values, it is recommended that you print test checks/cheques on a blank piece of paper and compare to an actual check over a light source until the accurate values are determined.

Click the 'Update Values' button when done.

[<< Invoice Setup](#)

[Pricing Setup >>](#)

Pricing Setup

For the Arranging Director, please refer to the items below to learn more about your Pricing Setup. These values allow you to set the various pricing information.



Modifying the price list information does not affect any data that you have previously entered.

- [Package Pricing](#)
- [Price List Effective Dates](#)
- [MPL Vault Disclaimer](#)

[<< Check Setup](#)

[Package Pricing >>](#)

Package Pricing

This section of Arranging Director allows you to create a list of packages for your contracts.

Navigate to Arranging Director > Pricing Setup > Package Pricing.

The values defined in your frequently used service types or packages are automatically filled in on the [contract form](#) when the Service/Package Type is selected from the dropdown at the top of the Contract screen. Non-inventoried products may be assigned in a package. (The system does not allow inventoried products in the package definitions because you may not have that product in inventory when the contract is entered.). This will dramatically speed up contract financial data entry and decrease the potential for errors. If necessary, these values can be overwritten on the contract page.

It is not possible to denote merchandise as an “Included” item. In order to be able to maintain accurate financial reporting, include the sales price as a line item and effectively “remove” the price via a discount.



The service pricing is not the same thing as the Service Types in the [Setup > Quickfill & System Static](#) area. Add the different types of Services offered (i.e. Memorial, Graveside, etc.) via the Setup tab and optionally, add pricing setups in the Service/Pricing area.

For example, there could be multiple pricing setups for a Memorial Service. In this case, add “Memorial” as a Service Type via [Setup > Quickfill & System Static > click the Service Types category](#) and add the various pricing schemes via the Service/Pricing area. When entering a client record, select a Service Type of “Memorial” as the Service Type on the Client Service screen and choose one of the pricing schemes previously defined on the Client Contract screen in order to pre-fill the contract line item pricing values.

Add a Package

Click the green + icon to add a package. Enter a service or package name and any internal notes.

Service/Package Maintenance	
<div>Service or Package Name: <input type="text"/></div> <div>Internal Notes: <input type="text"/></div>	
<div>Add Package</div>	
SERVICES	
Professional and Staff Services	
Package Service Amount	<input type="text" value="0.00"/>
Basic & Co-ordination Professional Fees	<input type="text" value="0.00"/> Included: <input type="checkbox"/>
Documentation - permits, forms, stationary, etc.	<input type="text" value="0.00"/> Included: <input type="checkbox"/>
Transportation of Deceased	<input type="text" value="0.00"/> Included: <input type="checkbox"/> <input type="text"/>
Basic Facilities	<input type="text" value="0.00"/> Included: <input type="checkbox"/>
Necessary Care of the Deceased	<input type="text" value="0.00"/> Included: <input type="checkbox"/>

Navigate through each section and:

- Enter the service amount
- Enter any pricing
- Check the box if any items are included in package

Click the 'Add Package' button when done. Once done, there will be options to delete or edit.

[<< Pricing Setup](#)

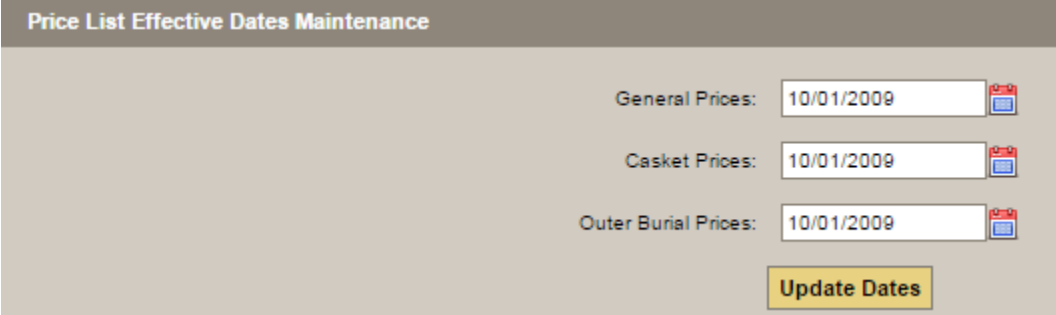
[Price List Effective Dates >>](#)




Price List Effective Dates

This section of Arranging Director show the effective dates of the prices that will appear on the cover pages of the General Price List and Merchandise Price List.

Navigate to Arranging Director > Pricing Setup > Price List Effective Dates.

For each price list, use the calendar icon to select the effective date. Click 'Update Dates' when done.



Price List Effective Dates Maintenance	
General Prices:	<input type="text" value="10/01/2009"/> 
Casket Prices:	<input type="text" value="10/01/2009"/> 
Outer Burial Prices:	<input type="text" value="10/01/2009"/> 
<input type="button" value="Update Dates"/>	

[<< Package Pricing](#)

[MPL Vault Disclaimer >>](#)

MPL Vault Disclaimer

This section of Arranging Director allows you to modify the disclaimer text that appears on the system's automatically generated Merchandise Price List. This disclaimer text appears immediately after the outer burial section.

Navigate to Arranging Director > Pricing Setup > MPL Vault Disclaimer.

Outer Burial Disclaimer Text :
<p>In most areas of the country, state or local law does not require that you buy an outerburial container. However, many cemeteries require that you have such a container so that the grave will not sink in. Either a grave liner or a burial vault will satisfy these requirements. The terms 'protective' and 'non-protective', which may be found in some printed material provided by the manufacturer, were chosen by the manufacturer and do not constitute or imply a representation or warranty by the funeral home. Although certain caskets offered for sale by this funeral establishment may be of better quality construction and comprised of more durable material than others, neither this funeral establishment nor any of its employees represents or implies that any casket will be airtight or watertight or will provide long-term preservation of human remains.</p>
<div>Update Values</div>

Click inside the white content area to add/edit text. Click 'Update Values' when done.

[<< Price List Effective Dates](#)

[Arranging Director Admin >>](#)

Arranging Director Admin

This section of Arranging Director allows you to access the admin settings.

Navigate to System Settings > Arranging Director Admin.



Only admin users will be able to access this area of the system.

Contract Maintenance

- [Change an At Need Contract Number](#)
- [Change a Preneed Contract Number](#)
- [Contract Numbering Setup](#)
- [Void an At Need Contract](#)
- [Void a Preneed Contract](#)
- [Delete an AddOn](#)
- [Reset Write Off Status](#)
- [Reset Manual Archive Status](#)
- [Sales Tax Setup](#)
- [View Contract Status Change Report](#)
- [View Contract Data Change Report](#)

Form Library Maintenance

- [Maintain Forms](#)
- [Create GPL Template](#)

Define Default Data Field Visibility on Client Screens

Automated Reporting Setup

- [Configure Automated Reporting Settings](#)
- [Configure Text Message Notifications](#)

Maintain Password and User Accounts

Inventory Control

- [Define Product Inventory Methods](#)
- [Maintain Inventory Transfer Locations](#)

Setup Timesheet Values

- [Email Address\(es\) to Use for Obituary Communications](#)

Financial & Quickbooks Setup and Maintenance

Export Raw Data into CSV Data Files

[<< MPL Vault Disclaimer](#)

[Contract Maintenance >>](#)

Contract Maintenance

This section of Arranging Director allows you to setup contract items.

Navigate to System Settings > Arranging Director Admin > Contract Maintenance.

✿ Only admin users will be able to access this area of the system.

- [Change an At Need Contract Number](#)
- [Change a Preneed Contract Number](#)
- [Contract Numbering Setup](#)
- [Void an At Need Contract](#)
- [Void a Preneed Contract](#)
- [Delete an AddOn](#)
- [Reset Write Off Status](#)
- [Reset Manual Archive Status](#)
- [Sales Tax Setup](#)
- [View Contract Status Change Report](#)
- [View Contract Data Change Report](#)

[<< Arranging Director Admin](#)

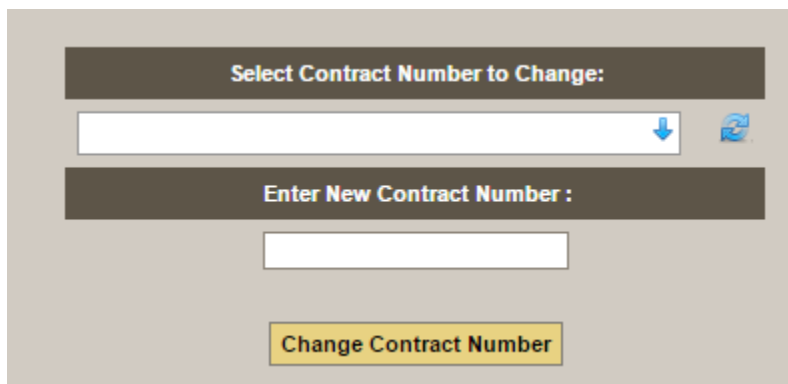
[Change an At Need Contract Number >>](#)

Change an At Need Contract Number

This section of Arranging Director allows you to update any existing at-need contract numbers.

Navigate to System Settings > Arranging Director Admin > Contract Maintenance > Change an At Need Contract Number.

* Only admin users will be able to access this area of the system.

The screenshot shows a web form with a light gray background. At the top, there is a dark gray header bar with the text "Select Contract Number to Change:". Below this is a white dropdown menu with a blue downward arrow icon on the right. To the right of the dropdown is a small blue icon. Below the dropdown is another dark gray header bar with the text "Enter New Contract Number :". Underneath this is a white text input field. At the bottom of the form is a yellow button with the text "Change Contract Number".

Use the dropdown to locate the contract number that requires changes. Enter the new contract number. Click 'Change Contract Number' when done.

[<< Contract Maintenance](#)


[Change a Preeed Contract Number >>](#)

Change a Preeed Contract Number

This section of Arranging Director allows you to update any existing pre-need contract numbers.

Navigate to System Settings > Arranging Director Admin > Contract Maintenance > Change a Preeed Contract Number.

✿ Only admin users will be able to access this area of the system.



The screenshot shows a web form with a light gray background. At the top, a dark gray header bar contains the text "Select Preeed Contract Number to Change:". Below this is a white dropdown menu with a blue downward arrow and a blue refresh icon to its right. Underneath the dropdown is another dark gray header bar with the text "Enter New Contract Number :". Below this is a white text input field. At the bottom of the form is a yellow button with the text "Change Contract Number".

Use the dropdown to locate the contract number that needs to be changed. Enter the new contract number. Click 'Change Contract Number' when done.

[<< Change an At Need Contract Number](#)

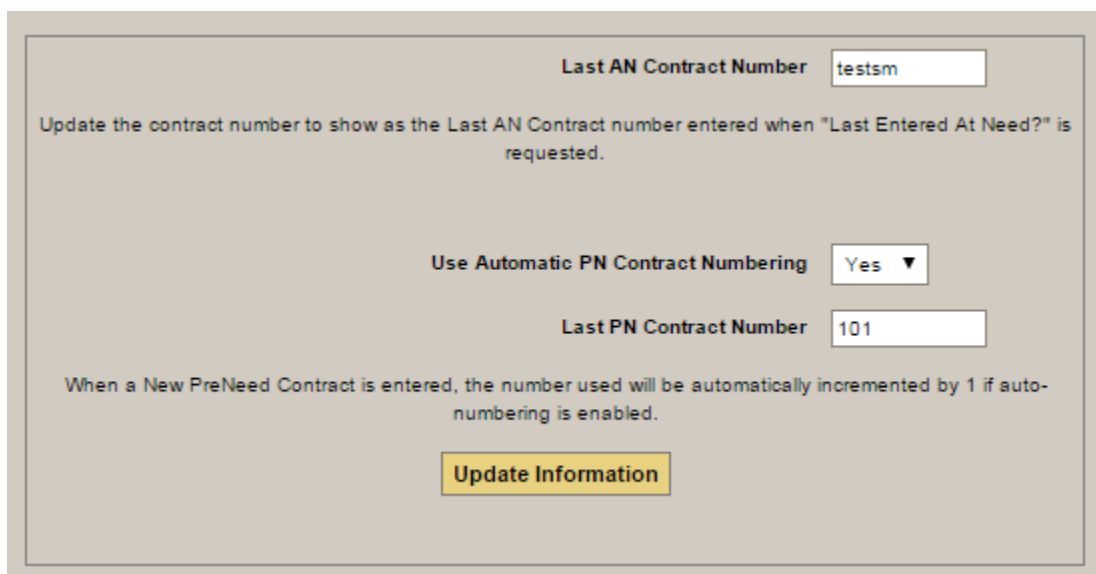
[Contract Numbering Setup >>](#)

Contract Numbering Setup

This section of Arranging Director allows you to setup your contract number.

Navigate to System Settings > Arranging Director Admin > Contract Maintenance > Contract Numbering Setup.

✿ Only admin users will be able to access this area of the system.



The screenshot shows a web form for 'Contract Numbering Setup'. It has a light gray background with a white border. At the top, there is a label 'Last AN Contract Number' followed by a text input field containing 'testsm'. Below this is a paragraph: 'Update the contract number to show as the Last AN Contract number entered when "Last Entered At Need?" is requested.' In the center, there is a label 'Use Automatic PN Contract Numbering' followed by a dropdown menu showing 'Yes' with a downward arrow. Below that is a label 'Last PN Contract Number' followed by a text input field containing '101'. Underneath is another paragraph: 'When a New PreNeed Contract is entered, the number used will be automatically incremented by 1 if auto-numbering is enabled.' At the bottom center is a yellow button with the text 'Update Information'.

Enter your At Need and Preneed contract number values.

[<< Change a Preneed Contract Number](#)

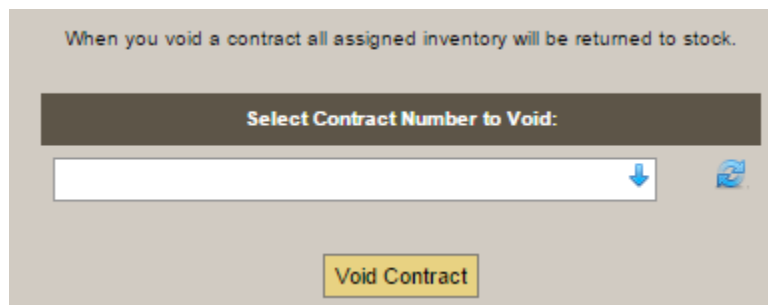
[Void an At Need Contract >>](#)

Void an At Need Contract

This section of Arranging Director allows you to void an at-need contract.

Navigate to System Settings > Arranging Director Admin > Contract Maintenance > Void an At Need Contract.

✿ Only admin users will be able to access this area of the system.



Use the dropdown to select the at-need contract to void and click 'Void Contract'.

[<< Contract Numbering Setup](#)

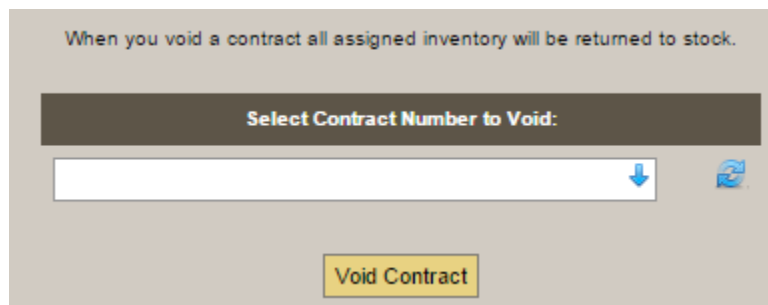
[Void a Preneed Contract >>](#)

Void a Premeed Contract

This section of Arranging Director allows you to void an pre-need contract.

Navigate to System Settings > Arranging Director Admin > Contract Maintenance > Void a Premeed Contract.

✿ Only admin users will be able to access this area of the system.



Use the dropdown to select the pre-need contract to void and click 'Void Contract'.

[<< Void an At Need Contract](#)

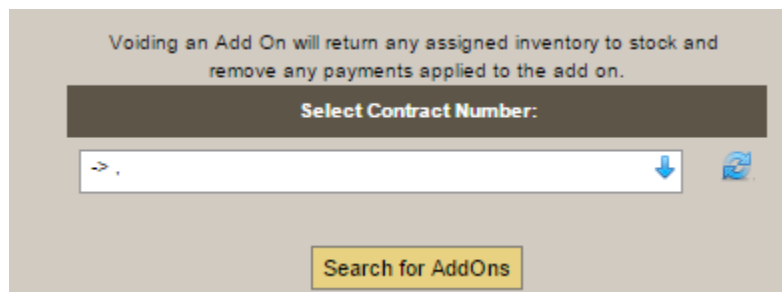
[Delete an AddOn >>](#)

Delete an AddOn

This section of Arranging Director allows you to void an add-on item.

Navigate to System Settings > Arranging Director Admin > Contract Maintenance > Delete an AddOn.

✿ Only admin users will be able to access this area of the system.



Voiding an Add On will return any assigned inventory to stock and remove any payments applied to the add on.

Select Contract Number:

->

Search for AddOns

Use the dropdown to select the add-on item to void and click 'Search for AddOns'.

[<< Void a Preneed Contract](#)

[Sales Tax Setup >>](#)

Sales Tax Setup

This section of Arranging Director allows you to setup your sales tax.

Navigate to System Settings > Arranging Director Admin > Contract Maintenance > Sales Tax Setup.

✿ Only admin users will be able to access this area of the system.

Local Sales Tax Percentage:	<input type="text" value="0.0000"/> %
State Sales Tax Percentage:	<input type="text" value="0.0000"/> %
Total Sales Tax Percentage:	<input type="text" value="0.0000"/> %
Allow "On Contract" Sales Tax Rate Edits By:	<input type="text" value="Only Admins"/> ▼
<input type="button" value="Update"/>	

Enter your current sales tax rates and define whether to allow sales tax percentage changes on contracts by any user or only Admins.

[<< Delete an AddOn](#)

[Form Library Maintenance >>](#)

Form Library Maintenance

This section of Arranging Director allows you to setup your forms.

Navigate to System Settings > Arranging Director Admin > Form Library Maintenance.



Only admin users will be able to access this area of the system.

- [Maintain Forms](#)
- [Create GPL Template](#)

[<< Sales Tax Setup](#)

[Maintain Forms >>](#)

Maintain Forms

This section of Arranging Director allows you to add the forms you will be using for printing. These can be set up for the home screen and client record.

Navigate to System Settings > Arranging Director Admin > Form Library Maintenance > Maintain Forms.



Only admin users will be able to access this area of the system.

To Forms Menu Add A New Form Update Visibility

Check the box next to each form to add it to your Forms Menu and/or Client Overview Screen.
 If a form is visible on the Overview Screen it must be visible on the Forms Menu.
 (Not all forms can be assigned to the Client Overview screen.)
 Roll over the form name for a description of the form. The Search function includes the hidden form description text.

Show 10 entries

Search:

Form Menu	Client Screen	Form	Category	Owner
<input type="checkbox"/>	<input type="checkbox"/>	Canada - At Need Contract	Canada	System
<input type="checkbox"/>	<input type="checkbox"/>	Canada - Notification of Death	Canada	System
<input type="checkbox"/>	<input type="checkbox"/>	Canada CPP Death Benefit Application	Canada	System

Check the box next to each form needed to appear on the Forms Menu and/or Client Overview screen then click the 'Update Visibility' button. Only the forms that are checked will appear on the screens selected.



You may also maintain existing forms and add new forms to the library from this screen. When a form is added, it will be considered a *Funeral Home Form* and appear in that column.

System forms are maintained by Halcyon and only the visibility of these forms can be controlled. The system wide list contains the forms that are common to most funeral homes but not every funeral home may have specialized forms. If the system forms do not meet the specific needs of your funeral home, your own forms can be uploaded.

Add Your Own Form

To add a form to the library, click 'Add a New Form' then the 'Find File' button to browse for the file. Enter the form name, description, category and type of the form. The 'Upload Document' button will become active after the the information has been entered.



After the form is uploaded, update the Forms Visibility so it will appear on your the Forms Menu.



Please contact your [Success Coach](#) to go over options for forms that you would like pre-filled with client data when it is displayed.

[<< Form Library Maintenance](#)

[Create GPL Template >>](#)

Create GPL Template

This section of Arranging Director allows you create a template for your GPL.

Navigate to System Settings > Arranging Director Admin > Form Library Maintenance > Create GPL Template.



Only admin users will be able to access this area of the system.

This option will allow you to download a Word template which can be customized then added to your [Forms Library](#). You do not need to use our template if you have another layout you prefer. Simply save it as a PDF and upload it to the [Forms Library](#).

[<< Maintain Forms](#)

[Define Default Data Field Visibility on Client Screens >>](#)

Define Default Data Field Visibility on Client Screens

This section of Arranging Director allows you hide and unhide fields in a client record. It is possible to collect a lot of information but there may be some data fields that will never (or infrequently) be used. This feature includes the option to hide them when the screen is initially displayed.

Navigate to System Settings > Arranging Director Admin > Data Field Visibility Maintenance > Define Default Data Field Visibility on Client Screens.



Only admin users will be able to access this area of the system.

Client Vitals	Client Service
Default Row Visibility for Client Vitals Screen (The existence of data in a field will override any hidden settings.)	
Arrangement Date	Hide ▼
Suffix	Show ▼
Nickname	Show ▼
Known As	Show ▼

For each data row, use the dropdown to select the default (hide/show). Click the “Show My Default Rows” button at any time within the client record to see and enter data for every possible data field. Click ‘Update Vitals Row Visibility’ when done.



All data fields that have a data entered into them for a particular client will display whether the default visibility is set to be hidden or not.

[<< Create GPL Template](#)

[Automated Reporting Setup >>](#)

Automated Reporting Setup

This section of Arranging Director allows you to setup your reporting.

Navigate to System Settings > Arranging Director Admin > Automated Reporting Setup.



Only admin users will be able to access this area of the system.

- [Configure Automated Reporting Settings](#)
- [Configure Text Message Notifications](#)

[<< Define Default Data Field Visibility on Client Screens](#)

[Configure Automated Reporting Settings >>](#)

Configure Automated Reporting Settings

This section of Arranging Director allows your to automatically run and email sales and payment reports to a designated email addresses.

Navigate to System Settings > Arranging Director Admin > Automated Reporting Setup > Configure Automated Reporting Settings.

✿ Only admin users will be able to access this area of the system.

Automated Reports Setup		
Report Name	Run Early AM	Email Report To
Daily Account History	Daily	<input type="text"/>
Weekly Account History	<input type="text"/>	<input type="text"/>
Weekly Sales Report	<input type="text"/>	<input type="text"/>
Monthly Consolidated Sales Report	After Last DOM	<input type="text"/>
<input type="button" value="Update"/>		
(Separate multiple email recipients with commas.)		

When logged in as an Admin to set up reporting information, you will receive the report for the single funeral home. Simply designate which day to run the report, if required, and the email address(es) to receive the report. Click 'Update' when done.

[<< Automated Reporting Setup](#)

[Configure Text Message Notifications >>](#)

Configure Text Message Notifications

This section of Arranging Director allows you to define which cell phone numbers to be notified via text whenever an At Need contract is added and/or a discount is given on a contract.

Navigate to System Settings > Arranging Director Admin > Automated Reporting Setup > Configure Text Message Notifications.

* Only admin users will be able to access this area of the system.

The screenshot shows a web form titled "Text Message Notification Setup". It has two columns: "Notification Type" and "Text Message To". Under "Notification Type", there are two options: "At Need Contract Addition" and "Discount Applied (Early Pay, Needy Family, Refund or Other Only)". Each option has a corresponding text input field in the "Text Message To" column. Below the input fields is a yellow "Update" button. A red note states: "NOTE: Text messaging fees may apply based on your cell phone carrier and plan. Please check your plan." At the bottom, in smaller text, it says: "(Phone Number and Carrier information is stored in an encrypted format.)"

Enter the cell phone address(es) to be notified for each event in the format of 9999999999@cellcarrierdomain.xxx. You may separate multiple phones with a comma. For example: 404551212@vtext.com,7705552345@txt.att.net.

Click the 'Show Carrier List' button below to locate the more common providers in the US and Canada. Please contact your cell phone provider to obtain your text message cell carrier domain name if your provider is not in the list.

Use the 'Test A Number ' option to check the validity of the number and to verify that you can receive the messages at the number entered. A successful send does not guarantee that the message will be received or received in a timely manner due to unforeseen problems with a cell carrier that the system is unable to control.

[<< Configure Automated Reporting Settings](#)

[Maintain Password and User Accounts >>](#)

Maintain Password and User Accounts

This section of Arranging Director allows you add additional general user accounts with customized access to the various menu tabs.

Navigate to System Settings > Arranging Director Admin > Password and User Account Maintenance > Maintain Password and User Accounts.

* Only admin users will be able to access this area of the system.

Username	Password	Employee	Access	Add New: +
BeatonMary	***** show	Beaton, Mary	Administrator	 

Click the 'Add New +' button to add a new user. Enter the information for that user. Click 'Add' when done.

* Usernames must be unique. For many funeral homes the initial login created by FrontRunner may be sufficient.

Use this feature to block access to parts of the system. For example, if there is a user who will maintain client information but not have access to financial information, the login can allow access to the Client menu option but not the Financial menu option.

[<< Configure Text Message Notifications](#)

[Inventory Control >>](#)

Inventory Control

This section of Arranging Director allows you to setup your inventory control.

Navigate to System Settings > Arranging Director Admin > Inventory Control.

✿ Only admin users will be able to access this area of the system.

- [Define Product Inventory Methods](#)
- [Maintain Inventory Transfer Locations](#)

[<< Maintain Password and User Accounts](#)

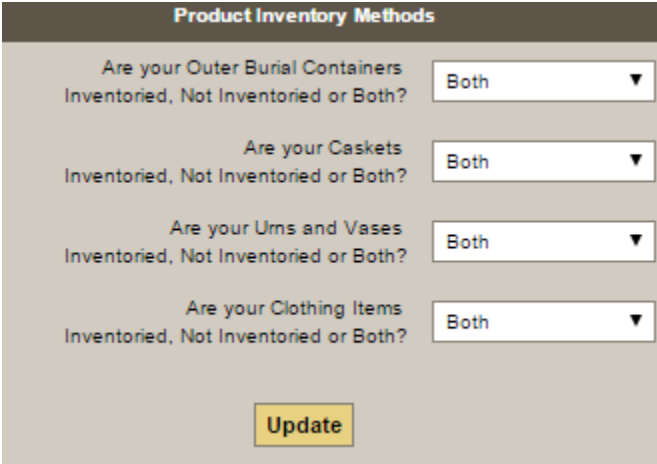
[Define Product Inventory Methods >>](#)

Define Product Inventory Methods

This section of Arranging Director allows you to define if/how you will inventory vaults, caskets, clothing, and urns and vases. The product selection method on the Client Financial screen is determined by these settings.

Navigate to System Settings > Arranging Director Admin > Inventory Control > Define Product Inventory Methods.

* Only admin users will be able to access this area of the system.



Product Inventory Methods	
Are your Outer Burial Containers Inventoried, Not Inventoried or Both?	Both ▼
Are your Caskets Inventoried, Not Inventoried or Both?	Both ▼
Are your Urns and Vases Inventoried, Not Inventoried or Both?	Both ▼
Are your Clothing Items Inventoried, Not Inventoried or Both?	Both ▼
Update	

Use the dropdowns to select the method for each. Click 'Update' when done.

[<< Inventory Control](#)

[Setup Timesheet Values >>](#)

Setup Timesheet Values

This section of Arranging Director allows you to setup timesheets.

Navigate to System Settings > Arranging Director Admin > Timesheet Setup > Setup Timesheet Values.

✿ Only admin users will be able to access this area of the system.

Number of Weeks in a Pay Period	<input type="text" value="2"/>
Date of Week Pay Period Starts	<input type="text" value="Sunday"/>
Send Timesheets To Email Address	<input type="text"/>
Your Email Address	<input type="text"/>
<input type="button" value="Update Information"/>	

Set the number of weeks in a pay period and the email addresses to use for submitting timesheets. Also, define the day of the week that the pay periods begin.

[<< Define Product Inventory Methods](#)

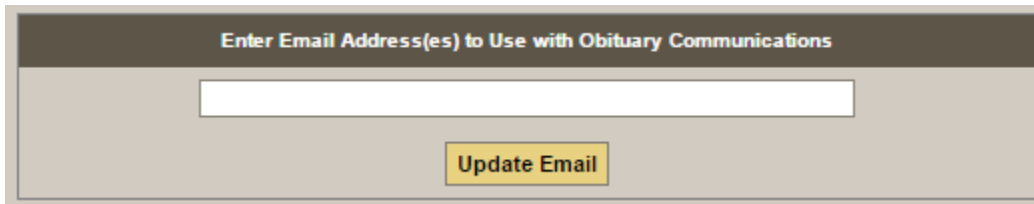
[Email Address\(es\) to Use for Obituary Communications >>](#)

Email Address(es) to Use for Obituary Communications

This section of Arranging Director allows you to setup email addresses for emailing obituaries to newspapers.

Navigate to System Settings > Arranging Director Admin > Obituary Setup > Email Address(es) to Use for Obituary Communications.

✿ Only admin users will be able to access this area of the system.

A screenshot of a web form titled "Enter Email Address(es) to Use with Obituary Communications". The form has a dark header bar with the title in white text. Below the header is a large, empty white text input field. At the bottom center of the form is a yellow button with the text "Update Email" in black.

Enter the email address that should be the “reply to” email address for these emails. Separate multiple emails addresses with commas. These addresses will be used to send the obituary email and will also receive a copy of the email sent. Click ‘Update Email’ when done.


[<< Setup Timesheet Values](#)

[Financial & Quickbooks Setup and Maintenance >>](#)

Financial & Quickbooks Setup and Maintenance

This section of Arranging Director allows you to setup and maintain your financials.

Navigate to System Settings > Arranging Director Admin > Financial & Quickbooks Setup and Maintenance.

 Only admin users will be able to access this area of the system.

- [Financial Data Editing Control Setup](#)
- [Set Last Check or Deposit Number Used](#)
- [Set Account Sort Order, Last Reconciled Date and Current Balance](#)
- [Expense Category Maintenance](#)
- [Edit A Transaction](#)
- [Cash Advance Maintenance – Other Payment Methods](#)

[<< Email Address\(es\) to Use for Obituary Communications](#)

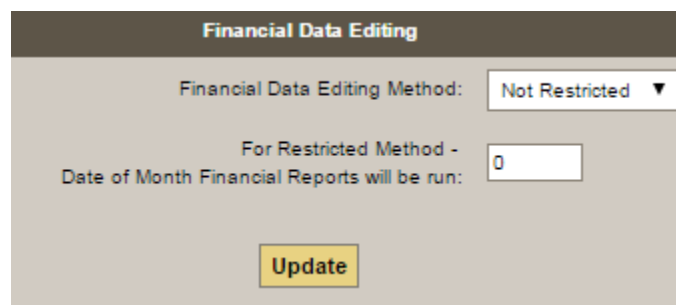
[Financial Data Editing Control Setup >>](#)

Financial Data Editing Control Setup

This section of Arranging Director allows you to set up whether to restrict financial data editing or not.

Navigate to System Settings > Arranging Director Admin > Financial & Quickbooks Setup and Maintenance > Financial Data Editing Control Setup.

✿ Only admin users will be able to access this area of the system.



The screenshot shows a web form titled "Financial Data Editing". It contains two main sections. The first section is "Financial Data Editing Method:" with a dropdown menu currently set to "Not Restricted". The second section is "For Restricted Method - Date of Month Financial Reports will be run:" with a text input field containing the number "0". At the bottom of the form is a yellow "Update" button.

Restricted Financial Data Editing:

- 'Not Restricted' allows client contract information to be edited at any time.
- 'With Restricted' Editing – define a cutoff date and any contract edits made after that date must be made as an Add On.

[<< Financial & Quickbooks Setup and Maintenance](#)

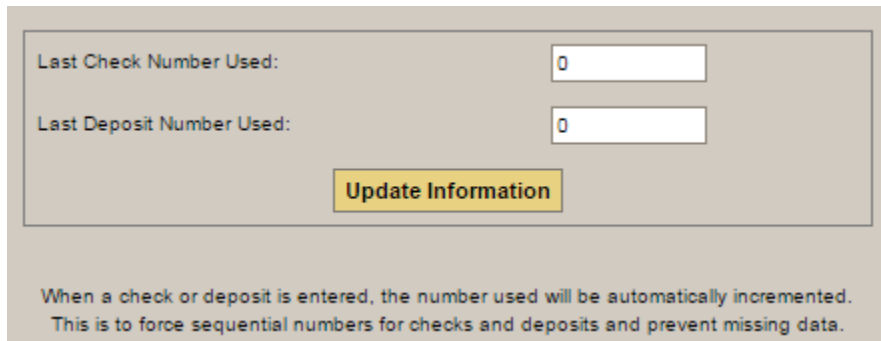
[Set Last Check or Deposit Number Used >>](#)

Set Last Check or Deposit Number Used

This section of Arranging Director allows you to set values to determine which check/cheque and deposit number to use for your next transaction entry.

Navigate to System Settings > Arranging Director Admin > Financial & Quickbooks Setup and Maintenance > Set Last Check or Deposit Number Used.

* Only admin users will be able to access this area of the system.



Last Check Number Used:

Last Deposit Number Used:

[Update Information](#)

When a check or deposit is entered, the number used will be automatically incremented.
This is to force sequential numbers for checks and deposits and prevent missing data.

[<< Financial Data Editing Control Setup](#)


[Set Account Sort Order, Last Reconciled Date and Current Balance >>](#)

Set Account Sort Order, Last Reconciled Date and Current Balance

This section of Arranging Director allows you to set the starting balance and last reconciled date for use with account register information.

Navigate to System Settings > Arranging Director Admin > Financial & Quickbooks Setup and Maintenance > Set Account Sort Order, Last Reconciled Date and Current Balance.

✿ Only admin users will be able to access this area of the system.

Last Reconciled On :	
02/01/2009	
Opening Balance :	
\$	4500.23
Financial Account Register & Account History Sort Order :	
By Ascending Transaction Date ▼	
Update Values	

Enter the last reconciliation date, the opening balance, how to sort, and click 'Update Values'.


[<< Set Last Check or Deposit Number Used](#)

[Expense Category Maintenance >>](#)

Expense Category Maintenance

This section of Arranging Director allows you to set up your expense categories.

Navigate to System Settings > Arranging Director Admin > Financial & Quickbooks Setup and Maintenance > Expense Category Maintenance.

 Only admin users will be able to access this area of the system.

Current Expense Categories		
Accounts Receivable	 	
Acquisition Expense	 	
Acquisition Expense:Airfare, Gas and Lodging	 	
Acquisition Expense:Closing Costs	 	
Acquisition Expense:Meals	 	

Use the green + icon to add an expense category. Enter the name and click 'Add'. Once categories are added, there are options to delete or edit the name.

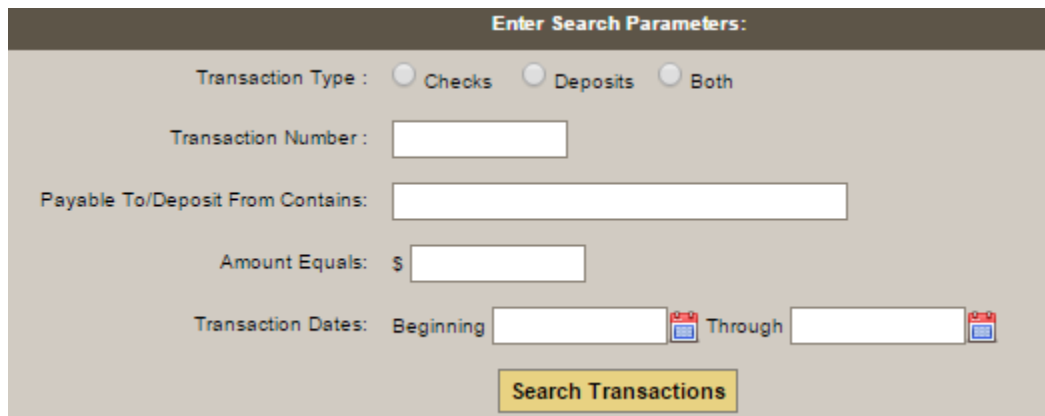
[<< Set Account Sort Order, Last Reconciled Date and Current Balance](#)
[Edit A Transaction \(includes Archived\) >>](#)

Edit A Transaction (includes Archived)

This section of Arranging Director allows you to edit transactions, including previously exported and cleared transactions.

Navigate to System Settings > Arranging Director Admin > Financial & Quickbooks Setup and Maintenance > Edit A Transaction (includes Archived) .

* Only admin users will be able to access this area of the system.



The screenshot shows a web form titled "Enter Search Parameters:". It contains several input fields and a search button. The fields are: "Transaction Type" with radio buttons for "Checks", "Deposits", and "Both"; "Transaction Number" with a text input field; "Payable To/Deposit From Contains:" with a text input field; "Amount Equals: \$" with a text input field; and "Transaction Dates: Beginning" followed by a date picker, "Through" followed by another date picker. A yellow "Search Transactions" button is located at the bottom of the form.

Enter the transaction type and number, text that contains who it is payable to or deposited from, amount, dates, and click 'Search Transactions'.

[<< Expense Category Maintenance](#)

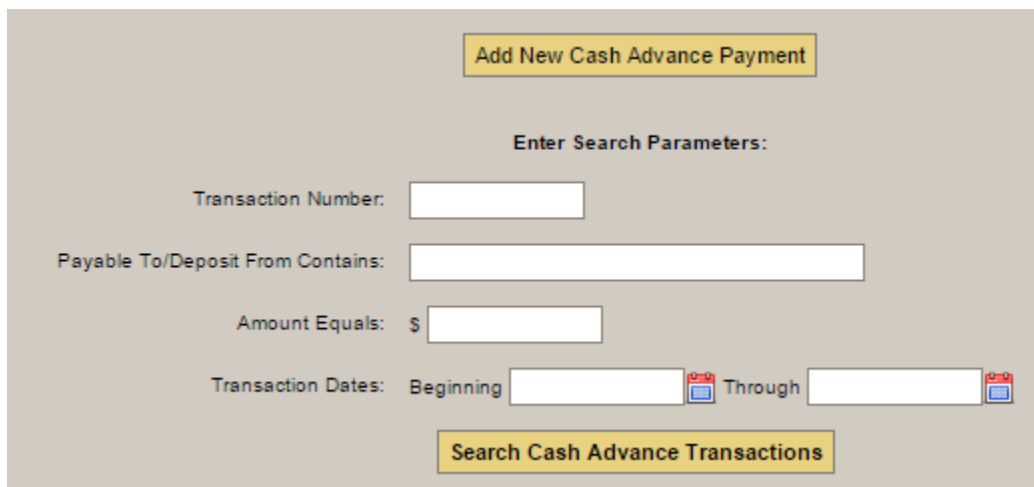
[Cash Advance Maintenance – Other Payment Methods >>](#)

Cash Advance Maintenance – Other Payment Methods

This section of Arranging Director allows you to mark cash advance items paid by anything other than a check/cheque.

Navigate to System Settings > Arranging Director Admin > Financial & Quickbooks Setup and Maintenance > Cash Advance Maintenance – Other Payment Methods.

✿ Only admin users will be able to access this area of the system.



If a cash advance transaction was paid with some means other than a check, enter it using this screen. These transactions will be included in the Cash Advance Reconciliation feature.



In order to use the Cash Advance Reconciliation feature, the expense categories must be defined for "Cash Advance" and "Cash Advance: Miscellaneous".

Enter the transaction number, text that contains who it is payable to or deposited from, amount, dates, and click 'Search Cash Advance Transactions'.

[<< Edit A Transaction \(includes Archived\)](#)

[Management System Features >>](#)

Management System Features

The FrontRunner Management System is an all-in-one feature that ensures your funeral firm can work smarter. The one-write technology allows you to build forms and contracts in minutes once a record is created. The deceased's information pre-populates necessary fields so you can accomplish tasks quickly and efficiently. As well, if you work with QuickBooks, the integration with FrontRunner removes extra steps from your management tasks.

Please find all the additional management features including mobile management available to your firm in the list below. If you have any questions, [contact your Success Coach](#).

- [Print / Edit State, Provincial & Federal Forms](#)
- [Generate/Edit a Family Contract](#)
- [QuickBooks Integration](#)
- [Other Management Features](#)
- [FAQ's on Management](#)

[<< Cash Advance Maintenance – Other Payment Methods](#) [Print / Edit State, Provincial & Federal Forms >>](#)

Print / Edit State, Provincial & Federal Forms

Creating, editing & printing forms is a critical component of your management responsibilities. FrontRunner's one-write technology allows you to generate forms that automatically populate with information entered in records. Choose from the options below to find step-by-step instructions.

- [Add / Edit / Build Forms](#)
- [Print Forms](#)
- [FAQs on Forms](#)

[<< Management System Features](#)

[Add / Edit / Build Forms >>](#)

Add / Edit / Build Forms

Add a Form

System Settings > Print Engine > My Forms > Add new Form

Scan the form so it's as straight as possible. Save it as a .jpg file. A pop-up will request information; the fields with a*! *are mandatory.

- Name – Enter the form's name
- Width/Height (inches)
- Offset – If the form is not aligned properly when printed, the offset can be adjusted in inches to correct.
- Image – Select the Browse button. Locate the file and open.
- Country – If this form is not U.S.A/ Canada specific, select Universal.
- Prov/State – If this form is not province/state specific, select Federal.
- Share Form – Share the form with other users.
- Fold Type – Leave on the default option.
- Can Print BG (background). To print the deceased information on a hard copy form (ex. death certificate), then leave as 'No'. To print the form on a blank white piece of paper with the image and information included, select 'Yes'.
- When complete, Save. The form will load on the screen.

Reset – Clear the information entered.

Open Existing – Edit a form already created.

Cancel – Closes the window.

Build / Edit a Form

When building a form, every box or section that requires information has a field attached to it. This allows the system to pull the requested information to the corresponding field on the form. Formatting options are available for all fields.

The toolbar includes a menu bar with 'File', 'Edit', 'View', and 'Help'. Below it are buttons for 'Clear', 'Save', and 'Close'. A row of dropdown menus includes 'Format', 'Font', 'Font Size', 'Text Align', a color selector, 'Letter Spacing', and 'Text Effect'.

Click on any field and adjust any one of the dropdowns (if option available).

Add Fields

Refer to the following field types:

Basic Field – This is a text field. Example: To add the first name of the deceased, search (on the left side) for the word “name” or “first name”.

Note: Some words may be different in the system than on the form. For example, the field ‘Sex’ is known as ‘Gender’ in the system.

Search for the field to add to the form. Once found, click on it then drag and drop to where it should be located on the form. Where the text appears on the form is exactly where the text will appear when printing.

The form is titled 'COMM DEPAR'. It has a header section with 'COPY A' and 'FOR DIVISION OF VITAL RECORDS'. Below this is a table with columns: 'DECEASED', '1. FULL NAME OF DECEASED (first)', '2. REGISTRATION AREA NUMBER', and '3. CERTIFICATE NUMBER'. A search bar is visible with the text 'Deceased - First Name' entered.

If a

section requires more than one field (ie. First, Middle, Last name of the deceased):

- Add all three fields to the one section
- Group the three fields to ensure they format properly without leaving any improper spacing. Select the first field, hold the control key down on the keyboard and then select the other two fields.
- Right click over the fields and select Group together.

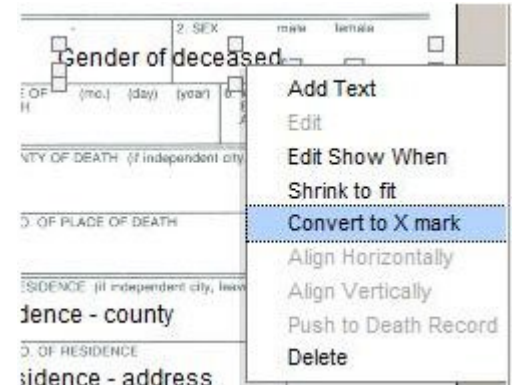
The 'Category' dropdown menu is open, showing a list of fields to add to the form. The selected category is 'Deceased - Basic'. The list includes: 'Alternate Name', 'Applicant - address', 'Applicant - city', 'Applicant - postal/zip code', 'Applicant - relationship to deceased', 'Applicant - state/province', 'Appointment - Time', 'Appointment Date', 'Armed Forces', 'Army Retiree', 'Assigned Director - First Name', 'Assigned Director - Last Name', 'Assigned Director - License Number', 'Assigned Director - Phone Number', and 'Assigned Director - Suffix'. At the bottom, there are navigation arrows and the text '1 - 16 of 766'.

- A pop up with separators will appear. By default, it will place a space in between each field. There will also be an option to separate with a comma.
- Save.

The field needs to be resized to fit the designated area on the form. Click on the field, click on the box that appears at the bottom right corner of the field, and expand or reduce the size of the field.

*Checkbox *- Add a check mark to a checkbox. Example: For gender, it may ask to check which gender (male or female).

- Locate the field from the list and drag it to one of the checkboxes.
- Right click over the field and select Convert to X mark.
- Select the option for that particular check mark.
- An “x” will appear and can be moved to the box on the form.
- Follow the same steps until all check boxes are complete.



Static Fields – These fields provide certain functionality:

- Static Text – Add a new basic field.
- Static Text Block – Add a block of text.
- Prayer – Add a section for a prayer or poem. (To add a new prayer to the database, please refer to the Manage Text/Prayers section.)
- Static Date – Enter a date by using a calendar.
- Today's Date – Printing date will auto populate the form.
- Static Time – Printing time will auto populate the form.
- Photo – Load the primary picture of the deceased on the form. To add a photo, search for the field called “Deceased – photo”. Drag and drop the field on to the stationery.

Add a Custom Field

If you are unable to find a field within the library, add a new basic field.



Note: Information will not be pulled from the record for this type of field; the text must be manually entered.

Right click over the section where the field needs to appear and select Add Text. The words ‘Static Text’ will appear; drag the field to where it needs to be located on the form. To resize the field to fit the designated

area, click on the field and then the box that appears at the bottom right. Expand and reduce the size of the field to fit within the section. Right click the field and select Edit.

The Label is the name of the field that will appear when searching. Remove the words 'Static Text' and Save.



No field will be visible until you hover over the section and the field name will appear. There is an option to add text before printing.

When complete, Save.

Align Fields

Once all fields are added, the row of fields can be aligned to print in a straight line from left to right as well as at a single left margin. This can be accomplished by grouping the fields.

- Align a Row – Click the first field, hold the control key down on the keyboard, and click the other fields in the row. Right click over the fields and select Align Top Edge.
- Align a Column – Click the first field, hold the control key down on the keyboard, and click the other fields in the column. Right click over the fields and select Align Left Edge.

When complete, Save.



Once the form is built, it will be available to print from any record by pulling the necessary information and automatically positioning it on the form.

Once a form is built in the My Forms section, hover over Edit to select 'Edit', 'Delete', or 'Copy'.

[<< Print / Edit State, Provincial & Federal Forms](#)

[Print Forms >>](#)

Print Forms

* All forms in the system can be printed but it's important to have Java installed on your computer. To download, go to www.java.com.

Navigate to a Record > Printing > Forms Printing.

Hover over Forms and select Print. To build or edit a form, [select Build](#).

* To print more than one form at a time without any modifications, select Quick Print.

Click on Preview to view, add data or modify fields before printing.

Verify the Information on the Form

Select Preview to populate the form with a record's information. Select Enter Data at the bottom.

- White box – information is pulling from the client editor.
- Red box – either the information was never entered in the record or the system doesn't incorporate the information and it will have to be added manually.

If there are any red boxes, replace the text and select the button to place the information in the record. If there are fields that do not apply to this record, leave red.

Before printing, select Preview to confirm the information is correct. Print.

How to Re-Align or Re-Format Information

Select Modify Fields to correct any fields that are not properly aligned.

- Align a Row – Click the first field and hold down the control key before clicking other fields in the row. Right-click the fields and select Align Top Edge.
- Align a Column – Click the first field and hold the control key before clicking other fields in the column. Right-click the fields and select Align Left Edge.

If any fields are not formatting properly, select the field and use the dropdowns at the top of the page.

Before printing, Preview to see how the form will appear when printed. Print.

Add Pre-Built Forms to Your Library

Use the dropdowns to select your country and state/province. Set the Category drop down to Master Forms. Check the 'Favorite' box beside any of the forms you will use. Veteran Forms are located in 'Federal' in the Prov/State drop down. All 'Favorite' forms will load when the Forms Printing section is accessed.



Note: No changes can be made to the layout or fields in pre-built forms. To make these types of changes, refer to 'Copy Pre-Built Forms to Your Library' below.

Copy Pre-Built Forms to Your Library

To make changes to a pre-built form, the form must first be copied. Mouse over the Preview button and select Copy.

Add a New Form to Your Library

To add a new form, [click here](#).

Edit / Build Your Form

To edit or build your form, [click here](#).

[<< Add / Edit / Build Forms](#)

[FAQs on Forms >>](#)

FAQs on Forms

Below are a list of common questions regarding forms. If you are still unable to find a solution to any problem that you are experiencing, please contact support@frontrunnerpro.com.

Question: I am trying to print forms. It says it's loading but nothing happens.

Answer:

If you have Java:

- Open the program and check for updates.
- In your Web browser, go to your Plug-ins. This may be different depending on browser you use. Make sure the Java Platform SE 7 is not in red and set to Always Activate.

If you do not have Java, go to www.java.com and download.

When done, refresh your system and try again.



If you are a Mac user working in Chrome, the latest version of Java will only work with 64-bit browsers.

Question: Can I save my form as a PDF?

Answer: Yes, as long as you have Adobe Reader, the program that allows you to open PDF files.

1. When you are ready to print a form, click the Print button and a printer box will pop-up.
2. Use the drop down to select the PDF printer option.

Question: Why does a white screen appear when I try to upload a form?

Answer:

1. You may need to update the version of Adobe Reader on your computer.
2. Rename the file if it contains any special characters (&, #, commas, etc...).
3. Refresh your web browser.

Generate/Edit a Family Contract

Once a contract is built within the FrontRunner system, customizing it for each record takes minutes with minimal effort. Our one-write technology saves you time and allows you to quickly generate and print professional documents to present to your families.

Contract Categories

System Settings > Contract Management > Contract Categories.

Category and sub-category names can be edited. Note: This section refers to categories not products.

The screenshot displays the 'Contract Categories' management interface. It features two main sections: 'Personal Professional Services' and 'Facilities and Equipment'. Each section includes a 'Personalized Value' input field, a 'Sub Classes' list, and an 'Add New Subclass' button. In the 'Personal Professional Services' section, a sub class named 'Professional Services' is listed with an 'Exclude From Contract' checkbox. In the 'Facilities and Equipment' section, a sub class named 'Facilities / Equipment / Staff' is listed with a 'Use of Staff' checkbox and an 'Exclude From Contract' checkbox. Below this, there is a 'Use of Facilities' field with a red 'X' icon.

Personal Professional Services

- Enter a new name in the Personalized Value field. (ex. Funeral Home Charges)
- Check Exclude From Contract if this category should not be included on the contract.

Professional Services – Edit the sub class by entering a new name. Note: At least one sub class must be entered. Select the Add New Subclass button at the top right of the first category.

Edit the second section – Facilities and Equipment. Refer to the graphic above as an example:

- Left the section called Facilities and Equipment.
- Renamed the Facilities/Equipment/Staff sub class to Use of Staff.

- Added a new sub class called Use of Facilities.

Continue working through all of the sections until complete. Save.

Contract Verbiage

System Settings > Contract Management > Contract Verbiage.

Contracts come with pre-written legal verbiage. To edit the content to fit your firm's specifications, modify the sentences directly in the boxes provided. Within each section, add a description underneath each category heading.

To upload your funeral home logo to the contract: Select the Browse button. Locate the file and select the Upload Image button. If there is no logo, check the box to Generate Header From Site Profile; the contract will pull information from your location profile.

The section underneath the logo (see below) contains: #_header_# Your Funeral Home Name #_/header_#. This allows you to customize the header of the contract so the information doesn't pull from the location profile. Add any additional information under the funeral home name. Save.

Contract Verbiage																	
<input type="checkbox"/> Generate Header From Site Profile <input type="button" value="Browse..."/> <input type="button" value="Upload Image"/> <input type="button" value="Remove Image"/>																	
 FrontRunner PROFESSIONAL																	
#_header_# Testing Site #_/_header_#																	
<p>Note: In the above text you can assign a header by surrounding the header text in #_header_# My Header #_/_header_#. This will output the string with bolded text and a larger font on the contract view. All resulting text will also be centered when rendered.</p>																	
No. _____ Deceased: _____ Date Of Death _____ Place Of Death _____ Date Of Statement _____																	
FUNERAL HOME CHARGES																	
<div style="border: 1px solid black; height: 30px; width: 100%;"></div>																	
<div style="border: 1px solid black; padding: 5px;"> Total Of Personal And Professional Services: _____ \$ </div>																	
USE OF FACILITIES																	
Statement Of Funeral Goods And Services																	
<div style="border: 1px solid black; padding: 5px;"> Fees are only for those items that you selected or that are required. If we are required by law or by a cemetery or crematory to use any items, we will explain the reasons for in writing below. If you selected a funeral that may require embalming, such as a funeral with viewing, you may have to pay for embalming. You do not have to pay for embalming you did not want if you selected such as... </div>																	
CASH ADVANCES																	
<div style="border: 1px solid black; height: 30px; width: 100%;"></div>																	
Total Of Cash Advance Items: _____ \$																	
We charge you for our services in obtaining: (specify cash advance items).																	
TOTAL FUNERAL HOME CHARGES																	
<table border="0" style="width: 100%;"> <tr> <td>Total Of Funeral Home Charges:</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Discount:</td> <td style="text-align: right;">-\$</td> </tr> <tr> <td>Total Cash Advances</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Sub-Total:</td> <td style="text-align: right;">\$</td> </tr> <tr> <td>Less Credits and Payments</td> <td style="text-align: right;">-\$</td> </tr> <tr> <td>Packaged Discount:</td> <td style="text-align: right;">-\$</td> </tr> <tr> <td>Amount From Insurance: ()</td> <td style="text-align: right;">-\$</td> </tr> <tr> <td>Balance Due:</td> <td style="text-align: right;">\$</td> </tr> </table>		Total Of Funeral Home Charges:	\$	Discount:	-\$	Total Cash Advances	\$	Sub-Total:	\$	Less Credits and Payments	-\$	Packaged Discount:	-\$	Amount From Insurance: ()	-\$	Balance Due:	\$
Total Of Funeral Home Charges:	\$																
Discount:	-\$																
Total Cash Advances	\$																
Sub-Total:	\$																
Less Credits and Payments	-\$																
Packaged Discount:	-\$																
Amount From Insurance: ()	-\$																
Balance Due:	\$																

Taxes & Misc.

System Settings > Contract Management > Taxes & Misc.

Whenever a package is selected, specify how the taxes will be applied.

- Don't apply any taxes
- Apply to items individually
- Apply to package price

Add the annual (%) late charge (optional).

- Check the Exclude Packages from Contract View box if packages are not used.
- Check the Show Package Discount on Contract box if applicable.
- Enter up to 3 different taxes applied to contracts. Each tax can be applied to all or individual categories.
- Select where to apply each tax. In this example, the Contract Tax (Sales Tax – 8%) will only be applied to the merchandise. Check the Merchandise box.

Contract Tax (%)	Sales Tax	at	8
Additional Tax 1 (%)		at	
Additional Tax 2 (%)		at	

Apply Contract Tax to	Apply Additional Tax 1 to	Apply Additional Tax 2 to
Personal Professional Services <input type="checkbox"/>	Personal Professional Services <input type="checkbox"/>	Personal Professional Services <input type="checkbox"/>
Facilities and Equipment <input type="checkbox"/>	Facilities and Equipment <input type="checkbox"/>	Facilities and Equipment <input type="checkbox"/>
Vehicles <input type="checkbox"/>	Vehicles <input type="checkbox"/>	Vehicles <input type="checkbox"/>
Merchandise <input checked="" type="checkbox"/>	Merchandise <input type="checkbox"/>	Merchandise <input type="checkbox"/>
Miscellaneous <input type="checkbox"/>	Miscellaneous <input type="checkbox"/>	Miscellaneous <input type="checkbox"/>

All sub categories created under a category will display to allow for specific items to be selected. When complete, Save.

Add Products

Make sure all of your products and services are [added to the product database](#).

Price List

The Price List displays all products added to your product database. System Settings > Catalogs > Price List.

Navigate to the category to add to the price list and click on the +. All product and services contained within the category will display.

16-Gauge										
Priority	Product Name	Description	Price	Classification	In GPL	Has Quantity	Max Quantity	Show Desc On Contract	Always Show On Contract	
3	Masterpiece	Description vbcbort Short Description 16 Gauge Steel Brushed with Champagne Velvet - 71008088	\$100.00	Casket or alternative container	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input type="checkbox"/>	Edit
2	Masterpiece	Description gph Short Description 16 Gauge Steel Brushed with Silver Velvet Interior - 71008122	\$0.00	Casket or alternative container	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30	<input type="checkbox"/>	<input type="checkbox"/>	Edit
	Nova Tigereye	Description Short Description 16 Gauge Steel Brushed with Arbutus Velvet Interior - 71007785	\$0.00	No Classification	<input type="checkbox"/>	<input type="checkbox"/>	N/A	<input type="checkbox"/>	<input type="checkbox"/>	Edit

Check the In GPL box to add as a selectable item for your contracts. When a product is added, the background color changes from pink to green.

All product text information is editable. Select Edit:

- Name
- Description
- Short Description
- Price
- Has Quantity – Check this box to signify that the product is available to add to a contract.
- Max Quantity – If the product can have a quantity greater than one, then enter the maximum quantity. (ex. you would most likely only allow one casket per contract but multiples for keepsake items).
- Classification
- Priority – Enter how the product should appear (the order) on the GPL.
- Show Desc. on Contract
- Always Show on Contract – Check to display the product on the contract, whether it is chosen or not. If it is not chosen, a N/A would be visible instead of a price.
- When complete, click Save.

Any saved changes to the price list will automatically push changes to the product database.

Create Packages

Packages are groups of products and services. If you don't sell packages, there's no need to create them in the system.

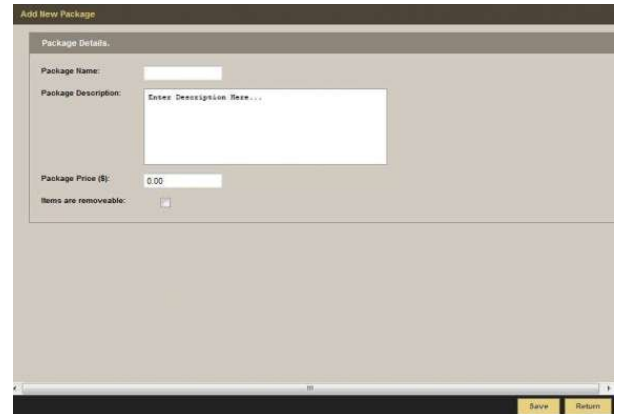
System Settings > Catalogs > Package Builder.

Once the price list is created and all individual items are added to the product database, packages can help your families select the products and services that are most appropriate.

Select the button. Enter the package properties:

- Package name
- Package description
- Package price
- Select whether individual items can be removed once a package is chosen.
- Save.

Once a package is created, check the items to be included.



The screenshot shows a web form titled "Add New Package". It contains the following fields and controls:

- Package Name:** A text input field.
- Package Description:** A large text area with a placeholder text "Enter Description Here...".
- Package Price (\$):** A text input field with "0.00" entered.
- Items are removable:** A checkbox that is currently unchecked.
- Buttons:** "Save" and "Return" buttons are located at the bottom right of the form.

Package Builder Add Package Save Package Edit Package

Package Details.

Package Name:

Personal Professional Services

Professional Services

In Package	Product Name	Quantity in Package	Retail Price	Total Price	
<input type="checkbox"/>	Cosmetic Services	0	\$200.00	\$0.00	Edit
<input type="checkbox"/>	Cremation	0	\$200.00	\$0.00	Edit
<input type="checkbox"/>	Embalming	0	\$300.00	\$0.00	Edit
<input type="checkbox"/>	Basic Fee of Professional Services	0	\$1,250.00	\$0.00	Edit
<input type="checkbox"/>	Custodial Care	0	\$100.00	\$0.00	Edit
<input type="checkbox"/>	Refrigeration	0	\$50.00	\$0.00	Edit

Facilities and Equipment

Facilities / Equipment / Staff

In Package	Product Name	Quantity in Package	Retail Price	Total Price	
<input type="checkbox"/>	Supervision for Visitations	0	\$300.00	\$0.00	Edit
<input type="checkbox"/>	Supervision for Private Visitation	0	\$200.00	\$0.00	Edit
<input type="checkbox"/>	Additional Funeral Home Staff as required	0	\$100.00	\$0.00	Edit
<input type="checkbox"/>	Supervision for Burial	0	\$250.00	\$0.00	Edit
<input type="checkbox"/>	Supervision of Service	0	\$250.00	\$0.00	Edit

Use of facilities

Save Package. To edit a package, select the Package Name and Edit Package.

Contract Printing

Open a Standard Mode record to create a contract. Select the Funeral Services Selector page on the left. If the record has no contract(s), a window will appear to enter information.

- Contract Name – Enter the name of the contract. ex: Last name of deceased.
- Contract Type – Select either At-Need or Pre-Need.
- Contract Designation – Select the contract designation.
- Invoice – Check the box if the family was invoiced.

Edit Selected Quote

Contract Name:

Contract Type:

Contract Designation:

Invoiced: ☐

Save Return

- Save.

Navigate to Contract Options where a dropdown will appear:

- Add New Quote – Add more than one contract for the record.
- Edit Quote Details – Returns to the initial properties window (shown above).
- Delete This Quote
- PreNeed to AtNeed – Convert from a Pre-Need to an At-Need contract.
- Print Contract

Contract Options ▼
Add New Quote
Edit Quote Details
Delete This Quote
PreNeed to AtNeed
Print Contract

Services & Merchandise

Select the services and merchandise chosen by the family. By default, the Packages section will open. If a package has been purchased, select it from the list. If you do not offer packages, add individual products and services from the list in the second column.

Smith John

STANDARD RECORD NOT PUBLISHED TO WEB

Auto Save in 10 minutes

Professional / Staff Services

Select Your Quote, Or Use the "Add New Quote" button

Name Of Quote: Smith

Total of Selected Packages: \$ 0.00
Total of Selections: \$ 0.00

Personal Professional Services

Professional Services	More Info	Quantity	Price
<input type="checkbox"/> Cremation - \$200 If you or your loved one has chosen cremation, we have a variety of ceremonies to choose from.	More Info	0	\$0
<input type="checkbox"/> Cosmetic Services - \$200 Cosmetic restoration of a loved one's appearance.	More Info	0	\$0
<input type="checkbox"/> Embalming - \$300 Preparing and preserving the remains for viewing or visitation.	More Info	0	\$0
<input type="checkbox"/> Basic Fee of Professional Services - \$1250 No Description Available.	More Info	0	\$0

Check products or services; the total price will populate at the top right. Click the More Info button to display more information about the product in a separate window. Some merchandise may include customization options, which can be added in this window. If a product or service is not listed, it needs to be added. Select Create New Product and enter the product or service information. Preview the contract through the Summary View page, which can be shown to the family.

If prices of any selection need to be modified, Edit This Quote. Click any of the white fields to edit the price.

Summary View Update Quote

Select Your Quote, Or Use the "Add New Quote" button

Name Of Quote: JSmith Total of Selected Packages: \$ 0.00
Total of Selections: \$ 11,270.15

PERSONAL AND PROFESSIONAL SERVICES

Refrigeration:	250.00
Custodial Care:	200.00
Basic Fee of Professional Services:	1,250.00
Embalming:	300.00
Total Of Personal And Professional Services:	1,800.00

Click Update Quote to save the information. Navigate to the Contract View page to preview the printable layout.

Each contract has final billing options. Navigate to Contract Options:

- Edit Quote Details – Edit the contract details.

- Billing – Select the family members who will take care of the final bill. Select who will be added to the contract from the names previously entered in the family relationships section. The balance due may be equally split or as requested. To add

a new family member, click the 'Add Family' button at the bottom right, which will display the same screen as the family relationships page.

- Social Services – Add social services.
- Down Payments – Add the amount already paid by the family.
- Quickbooks Billing – Export the contract information into Quickbooks (if app available within your system).

Balance Due: \$1,959.00

<input checked="" type="checkbox"/>	Mary Smith	SIN:		Amount:	979.50
<input checked="" type="checkbox"/>	Paul Smith	SIN:		Amount:	979.50

Contract Options ▼

- Edit Quote Details
- Billing
- Social Services
- Down Payments
- Quickbooks Billing
- Family Share
- Print

Family Share – Select individual items and create separate contracts for each family member who wishes to pay for specific items.

- Select the family member.
- Check the applicable products / services.
- Once a product is selected, a pop-up window will appear to create a separate contract for a specific family member.
- This step can be repeated for all family members until all items on the contract have been selected.

Print – Select the Print option to print out the contract for the family to sign. The system will generate a PDF of the contract which can be printed on legal sized paper (8.5×14). If multiple contracts have been created, select which contract to print.

[<< FAQs on Forms](#)

[QuickBooks Integration >>](#)

QuickBooks Integration

QuickBooks software must be set-up properly before launching the QuickBooks Integration. Also, all products in the product catalog require a QuickBooks Name less than 30 characters and without any special characters included.

Basic Setup

System Settings > QB Management > First Time Setup > Create a password to ensure secure settings between the FrontRunner system and QB.

Click Create User. Download the three files to your computer:

- Web Connector File
- QBXML Installer
- QWC File (download & Save)



Install the Web Connector and QBXML programs by double clicking on the downloaded file(s). Once both are installed, open Web Connector and add the QWC File by clicking the “Add an application” button. The QWC file is the third program on the list, and will look like a text file.



Both the Web Connector and QBXML programs need to be installed before adding the QWC File to the Web Connector.

Authorize the Web Service. Hit “OK”. Note: This will only open on set up.



In Web Connector, enter your password and press tab (on the keyboard) for the prompt to save.

Select All Select None Update Selected			View Log Troubleshoot Help		
Application	Auto-Run	Every _ Min	Status	Password	Remove
<input checked="" type="checkbox"/> IMS Quickbooks Integration Montroy Funeral Home For support: https://tim.fronrunnerpro.com/runtime/3391/ims/include/storage/quickbooks/setup.php	<input type="checkbox"/>		Last run: Last result: No data exchange required Click for more information	******	<input type="button" value="Remove"/>

Check the Auto-Run box to automatically push the data. Set a default amount of time that the web connector will auto-run. If you're working with several records and don't want the web connector to load every time, it can be set to run a pre-determined amount of time.



For more control of when files are exported to QuickBooks, check the first box and do it manually. Click Update Selected. We recommend unchecking the Auto Run box once the setup is complete.

Account Affiliations

The system will utilize accounts in your QuickBooks so it's necessary to associate those accounts. Open QuickBooks and navigate to the Chart of Accounts. Write down the names (whether existing or if you want to create new ones) of the following types of accounts. You can also change existing accounts to the names highlighted in yellow below if it helps.

- Income Account
- Cost of Goods Sold Account
- Asset Account

ex. My QuickBooks Accounts Listing

Name	Type
♦Accounts Receivable	Accounts Receivable
♦Undeposited Funds	Other Current Asset
♦Accumulated Depreciation	Fixed Asset
♦Furniture and Equipment	Fixed Asset
♦Inventory Asset	Other Asset
♦Payroll Liabilities	Other Current Liability
♦Opening Balance Equity	Equity
♦Owners Draw	Equity
♦Owners Equity	Equity
♦Discounts	Income
♦Sales - Hardware	Income
♦Cost of Goods Sold	Cost of Goods Sold
♦Advertising and Promotion	Expense
♦Automobile Expense	Expense
♦Bank Service Charges	Expense
♦Computer and Internet Expenses	Expense
♦Depreciation Expense	Expense
♦Insurance Expense	Expense
♦Interest Expense	Expense
♦Janitorial Expense	Expense
♦Meals and Entertainment	Expense
♦Office Supplies	Expense
♦Payroll Expenses	Expense
♦Professional Fees	Expense
♦Rent Expense	Expense
♦Repairs and Maintenance	Expense
♦Telephone Expense	Expense
♦Uniforms	Expense
♦Utilities	Expense
♦Ask My Accountant	Other Expense

System Settings > Profile.

Refer to the Tax & QuickBooks Integration Settings section. Enter the three account names to ensure the same names within the FrontRunner system and QuickBooks.

Quickbooks Income Account	<input type="text" value="Sales - Hardware"/>
Quickbooks Cost of Goods Sold Account	<input type="text" value="Cost of Goods Sold"/>
Quickbooks Asset Account	<input type="text" value="Inventory Asset"/>



Notice how the names in the System profile match the QuickBooks account names EXACTLY

QuickBooks will use these accounts when pushing invoices to your system. If not added properly, there will be an error message with the web connector.

Item Affiliations

To offer discounts and/or down payments on contracts, create the items and add to your System Profile. Start by creating the two items in QuickBooks. Click the Items & Services button on your QuickBooks desktop. Follow the pictures below to set up four items in your QuickBooks.

1) Subtotal

The screenshot shows the 'Subtotal' item creation form. The 'Type' dropdown is set to 'Subtotal'. A text box explains: 'Use to total all items above it on a form, up to the last subtotal. Useful for applying a percentage discount or surcharge to many items.' The 'Item Name/Number' text box contains 'Subtotal'. The 'Description' text box is empty. On the right, there are buttons for 'OK', 'Cancel', and 'Spelling', and a checkbox labeled 'Item is inactive' which is unchecked.

2) Discount

The screenshot shows the 'Discount' item creation form. The 'Type' dropdown is set to 'Discount'. A text box explains: 'Use to subtract a percentage or fixed amount from a total or subtotal. Do not use this item type for an early payment discount.' The 'Item Name/Number' text box contains 'Discount'. There is a checkbox for 'Subitem of' which is unchecked. The 'Description' text box is empty. To the right of the description box are two input fields: 'Amount or %' with '0.00' and 'Account' with 'Sales - Hardware'. On the far right, there are buttons for 'OK', 'Cancel', 'Custom Fields', and 'Spelling', and a checkbox labeled 'Item is inactive' which is unchecked.

3) Down Payment

Type Payment ▼ Use to record a partial payment at the time of the sale. It reduces the amount owed on an invoice.		OK Cancel Next Custom Fields Spelling
Item Name/Number Down Payment		
Description <div></div>		
<input type="checkbox"/> Item is inactive		
Payment Method ▼		
<input checked="" type="radio"/> Group with other undeposited funds <input type="radio"/> Deposit To ▼		

4) Newspaper Notice

Type Service ▼ Use for services you charge for or purchase, like specialized labor, consulting hours, or professional fees.		OK Cancel Next Custom Fields Spelling
Item Name/Number Newspaper Notice	<input type="checkbox"/> Subitem of ▼	
Unit of Measure Enable...		
<input type="checkbox"/> This service is used in assemblies or is performed by a subcontractor or partner		
<input type="checkbox"/> Item is inactive		
Description <div></div>	Rate 0.00 Tax Code Tax ▼ Account Income ▼	

Once the items are created, go to System > System Profile and type in the appropriate names. The names must match for the contracts to push properly.

Example:

Quickbooks Discount Account Name	Discount
Quickbooks Subtotal Account Name	Subtotal

! FOR EXISTING QUICKBOOKS USERS ONLY. If you are a new user or have no products set up in QuickBooks, please skip to the next section.

Product Setup

Note: Existing QuickBooks users – make sure your products are set-up with the form “{IMS product name} {IMS product code}”. This is searched when transferring an invoice. If the IMS cannot find the appropriate item in QuickBooks, the integration will not be successful.

Example:

♦ Monarch 6030524	20 Gauge Steel with Ivory Crepe Interior - 6030524
♦ Monroe 4507682	18 Gauge Steel Brushed with Ice Pink Velvet Interior - 4507682
♦ Monroe 4507683	18 Gauge Steel Brushed with Light Blue Velvet Interior - 4507683
♦ Monte Carlo 4601287	20 Gauge Steel with Blue Crepe Interior - 4601287
♦ Montgomery 6028717	Ash with Velvet Interior - 6028717
♦ Moriah 5010483	Cherry with Moselle Crepe Interior - 5010483
♦ Moriah 5010805	Cherry with Moselle Crepe Interior - 5010805
♦ Morning Passage 6030132	This stunning sculpture adds to your decor while being a constant reminder of your loved one.
♦ Moses 6045521	Walnut with Almond Velvet Interior - 6045521
♦ Moses 6045523	Walnut with Almond Velvet Interior - 6045523
♦ Music Box 6033954	Red Rose Oval Music Box
♦ Nature 7307	Stationery set to remember this special occasion
♦ Necklace 6034016	Silver Reunion Heart Necklace
♦ Neopolitan 4504439	18 Gauge Steel with Crepe Interior - 4504439
♦ Neopolitan 6036625	18 Gauge Steel with Crepe Interior - 6036625

Note: The name and product code in left column are less than 31 characters long. The right side displays a description of the item.

If you have existing product, edit it so the name is similar to the one in image below:

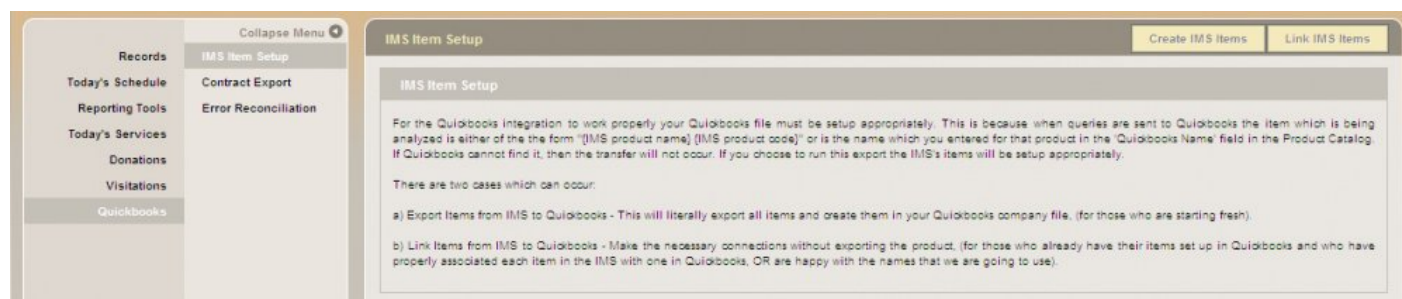
Type	Use for goods you purchase, track as inventory, and resell.		OK
Inventory Part			Cancel
			Custom Fields
Item Name/Number	<input type="checkbox"/> Subitem of	Manufacturer's Part Number	Spelling
Pieta 4502151			

IMS Items Export

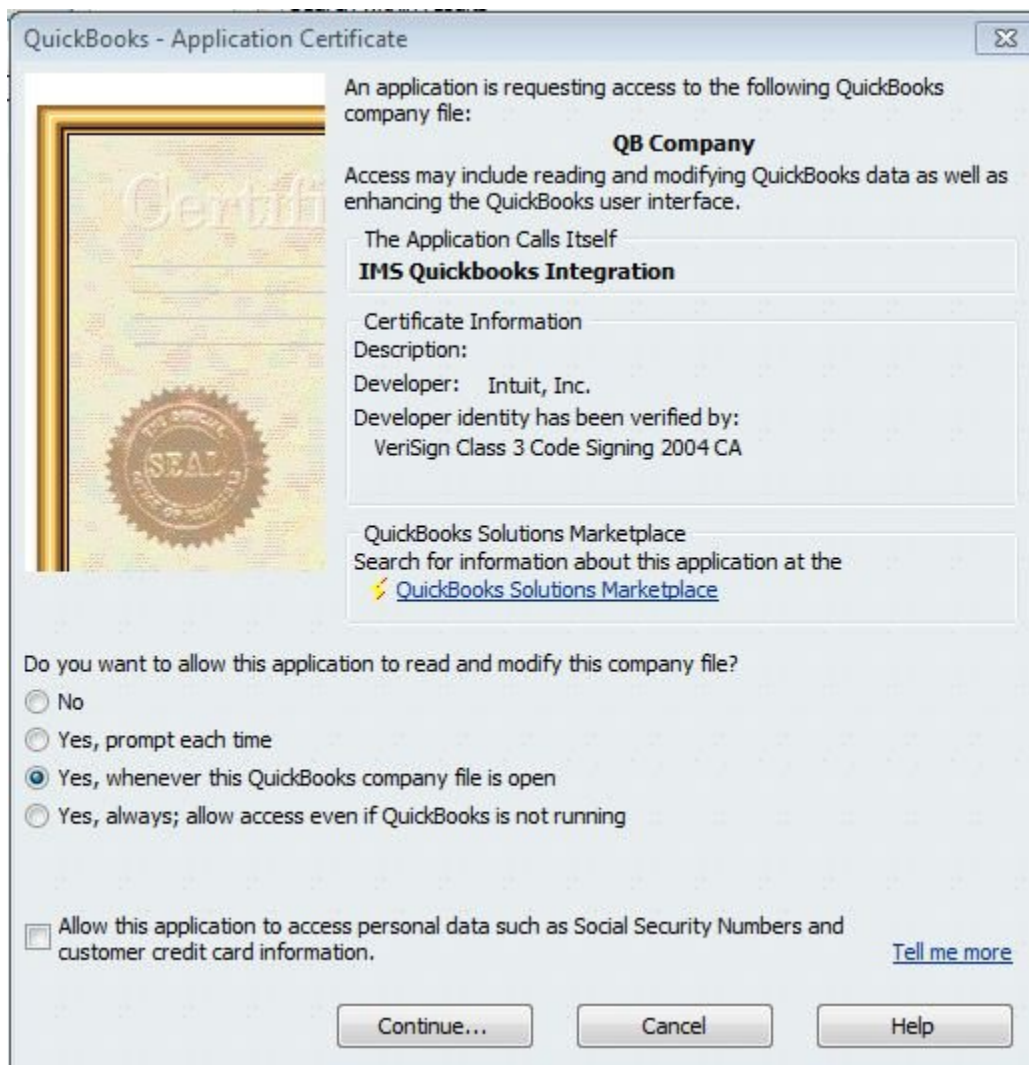
The Web Connector provides the ability to export items from the IMS to QuickBooks saving you the time of manually entering the information. Open QuickBooks, the IMS and Web Connector. In the Web Connector, check the box to the left of your name and uncheck “auto-run”.



Go Back to your System > Management > QuickBooks and click “Export IMS Items”.



Go back to the Web Connector. QuickBooks may ask you to accept the certificate. This allows the system to connect to your QuickBooks. Answer : “Yes, whenever this QuickBooks company file is open”.



The Web Connector will begin exporting to your Item List in QuickBooks. Go to your QuickBooks Items & Services to see the system products being added. This will take a few minutes to complete.

♦ Mattan 6045524	Pine with Rosetan Crepe Interior - 6045524
♦ Meadowland 5011323	Pine with Rosetan Crepe Interior - 5011323
♦ Memorial Blanket 6034017	Gold finished picture frame with a personal poem
♦ Memorial Candle 6033945	Porcelain and wood music box that plays Amazing Grace.
♦ Memorial Oak 6036636	Oak with Ivory Velvet Interior - 6036636
♦ Memorial Stationery SV04	Stationery Set to remember this special occasion.
♦ Mercury 6036629	20-Gauge Steel with Grey Crepe Interior - 6036629
♦ Military Honors SV07	An honor guard and U.S. flag service help show the family's respect for a loved one's service to our country. We can make all the arrangements.
♦ Monarch 6021642	20 Gauge Steel with Rosetan Crepe Interior - 6021642
♦ Monarch 6021652	20 Gauge Steel with Ivory Crepe Interior - 6021652
♦ Monte Carlo 4601287	20 Gauge Steel with Blue Crepe Interior - 4601287

All products will add with the correct name, item number and description. To change details about any products, do so in the IMS Product Catalog and it will export the next time the Web Connector runs. This will prevent you from having to enter the adjustments twice.

IMS Contract Export

Once a contract is built for a record, proceed to the “Contract Options” link. The gold button called “QuickBooks Billing” links to a screen where the person responsible for contract billing can be designated. If a family share is set-up, the first person on the list will be the primary customer and the other payees will be shown in the memo line of the invoice. If a family share is not set up, select the Executor, Informant, Next of Kin, or a manual entry. All address and contact information in the record will be pushed to QuickBooks.

Billing Information

Please enter your billing information here. This only pertains to exporting to Quickbooks so if you do not export contract information to Quickbooks there is no need to fill this out. Otherwise, you must select one person to be the one who is being billed, (even if the bill is being split as this is a requirement of quickbooks). The following are the possibilities based on what you have filled out on the First Call sheet and the relations found in Family Information. You can also always choose "Other" and add the information in the spaces below.

Bill To:

☐ Executor: Mike Coles

☐ Informant: William Barnes

☒ Next of Kin: William Barnes

☐ Other:

First Name:

Last Name:

Address:

City:

Province:

Postal Code:

Country:

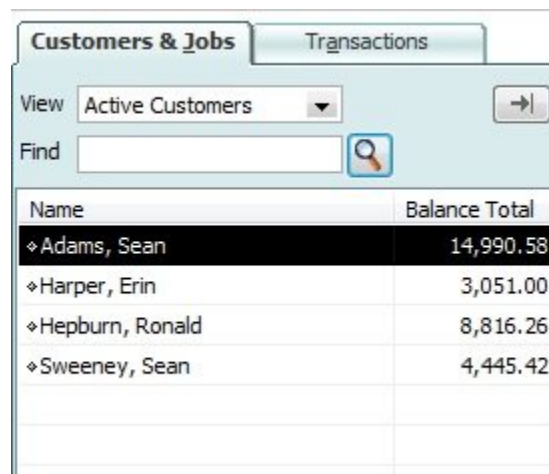
Phone:

Save Return

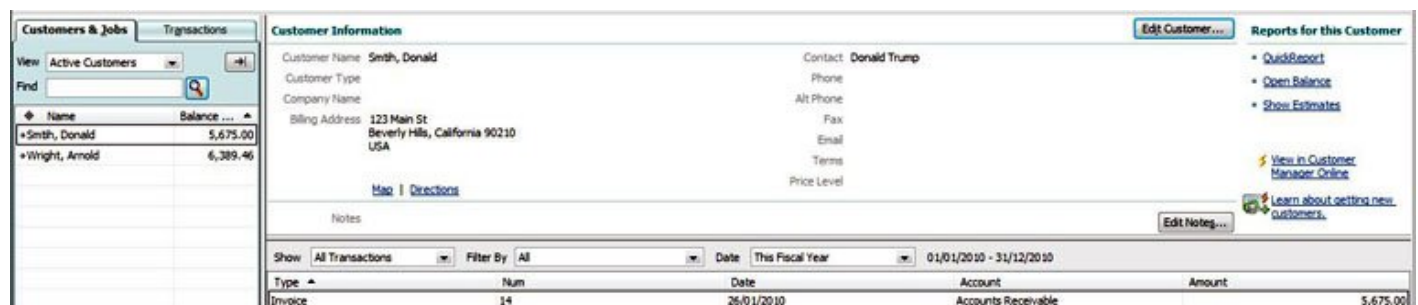
Once a contract is selected to export, the end product can be viewed in QuickBooks. The IMS, QuickBooks, and the Web Connector must all be open (can be minimized) during this process. Go to the Web Connector and click “Update Selected”. If this is not clickable, check the box to the far left of the Web Connector.



Once Update Selected is chosen, go to “Customer Center” in QuickBooks to view the new customer/contract.



Click once on a customer's name and the appropriate invoices will display on the right. Double click on an invoice to pull it up.



Once payments are accepted in QuickBooks, they will count toward your financial statements, customer sales, and any item sales or count.

[<< Generate/Edit a Family Contract](#)

[Other Management Features >>](#)

Other Management Features

The following features within the FrontRunner system allow you to increase efficiencies for your funeral home. The system has been developed to incorporate as many tools as possible to streamline processes and make your life easier. If you would like more information about specific features, [contact your Success Coach](#).

- [Basic Reporting](#)
- [Custom Fields](#)
- [Multi-Location](#)
- [Scheduler](#)
- [API Sync](#)

[<< QuickBooks Integration](#)

[Basic Reporting >>](#)

Basic Reporting

Management > Reporting Tools > Statistics

Name	Type	Description	
Call Volume By Month	Statistics	Call volume broken down by month	View
Call Volume By Gender	Statistics	Call volume broken down by gender	View
Call Volume By Disposition	Statistics	Call volume broken down by disposition	View
Visitation Volume By Month	Statistics	Visitation volume broken down by month	View
Visitations By Location	Statistics	Visitations broken down by location	View
Services By Location	Statistics	Services broken down by location	View
Disposition/Service Comparison	Statistics	Shows a breakdown of records by disposition type with a service, and without a service	View
Interments By Location	Statistics	Interments broken down by location	View
Published Vs Un-Published	Statistics	Published Vs Un-Published records	View
Records By Status	Statistics	Records by status type	View

Use the search bar or browse through the pages to find a particular report. Select View. Filter the report based on date or use the eraser to delete the current date range.

Once the report loads, there are four viewing options.

- Column Chart
- Bar Chart
- Line Chart
- Pie Chart

[<< Other Management Features](#)


[Custom Fields >>](#)

Custom Fields

If the FrontRunner system does not include a particular field that is necessary for your funeral firm, the Custom Fields creator allows you to build your own. In turn, it can be applied to every record in the system.

System Settings > System Profile > Custom Fields > Add New Field

Create Custom Field

Label: 

Category: (Optional)

Type:

- ☒ **Text (Single Line)** - Single line of text with max length 255
- ☐ **Text (Paragraph)** - Multiple lines of text with max length 255
- ☐ **Number** - Whole and real numbers, positive and negative
- ☐ **Phone Number** - 10 digit phone number
- ☐ **Date** - Pop up calendar for picking a date
- ☐ **Time** - Enter hour, minute and am/pm
- ☐ **Drop Down List** - Select from predefined values

Save **Cancel**

Label – Enter the name of the new field.

Category – If no category is entered, it will be placed in a Miscellaneous category.

Type – Choose an option.

Save



Note: If 'Drop Down List' is chosen, select the Add Value button. Enter the name of first item in 'Label'. Repeat this step until all items are listed.

The new field can be added to forms and stationery items as well as records. To edit the field, select Edit on the right.

Use your Custom Field

Navigate to your Record > Arrangement > Custom Fields.

Any new fields added in System Settings will be visible. Enter any additional information. The categories display in alphabetical order. Save.

A. Delivery			
Arrival Type:	<input type="text"/>	Notes for Delivery:	<input type="text"/>
B. Prep			
Cremation Number:	<input type="text"/>	Embalmer Fax Number:	<input type="text"/>

[<< Basic Reporting](#)

[Multi-Location >>](#)

Multi-Location

The FrontRunner system is set up to include single and multiple branch locations. Specific branch information then populates the website and can be applied to every record.

System Settings > System Profile > Profile > Add New Site Branch

Enter information about an additional location. For more information on what information to enter, [refer to your System Profile](#). When complete, Save. Repeat the steps for each location until all are all listed in your profile.

All locations will be accessible when adding a record, creating a DVD, and printing forms.

Edit Record Settings

File Number: TS2-2012-04-02-1

Deceased in Military: Yes

Person Making Call: Informant

Branch: Montroy Funeral Home

Mode: Montroy Funeral Home
American Funeral Home
Montroy Young Funeral Home

Service For:

Status:

Type of Disposition

Delete Record Save Cancel

If the Add New Site Branch button is not visible on your Profile page, please [contact your Success Coach](#).

[<< Custom Fields](#)

[Scheduler >>](#)

Scheduler

This features provides a quick overview of today's visitations and services.

The three sections in the Scheduler app all work the same way. Navigate to Management in the top menu.

1. Today's Schedule will display the services and visitations scheduled for today.
2. Today's Services will display the services scheduled today.
3. Visitations will display the visitations scheduled today.

A keyword search is available within each section to find entries. Print the schedule at any time.

[<< Multi-Location](#)

[API Sync >>](#)

API Sync

[Your Success Coach](#) will create an API number and send to your management company. Once the API number is set up by the management company, the syncing process will work.

Where to Start

Everything starts in your management system. Create a record and then push the details over to the FrontRunner system. There will be a button to do so. Once done, a Book of Memories will automatically be created for the website.



Note: Any changes made within the FrontRunner system will NOT push to your management system.

If the integration isn't working properly, [contact your Success Coach](#) to determine and help resolve the issue.

[<< Scheduler](#)

[FAQ's on Management >>](#)

FAQ's on Management

Question: Why did FrontRunner not purchase Twin Tiers (MiMS)?

Answer: Some clients have asked about the logic behind our company's decision not to purchase MiMS despite the fact that it had been an integration partner. FrontRunner disagreed with the opinion of a few former staff members who since that time, have bought MiMS.

Over the past few years, FrontRunner has met with several companies looking to sell interests in their funeral home management software. Because of the working relationship FrontRunner had with MiMS, we naturally took a very close look at its solution.

Our primary concern was that the management system was antiquated and would require a tremendous amount of work to achieve FrontRunner's high standards for our business systems now and in the future.

With very sparse sales, MiMS' only revenues to keep the doors open were framed around charging customers an annual, albeit voluntary, support fee. FrontRunner believes that the practice of charging clients a support fee when the company controls whether the software works or not is a practice that is ripe for abuse.

FrontRunner has always guided its company on the principals of honesty, integrity and trust. We insist on it from all of our employees and those we do business with. In the end, we simply decided MiMS was not the right fit for our company.

Stationery Printing

With FrontRunner's one-write logic, creating stationery products has never been easier. Information entered in records automatically populates the various fields on all stationery items.

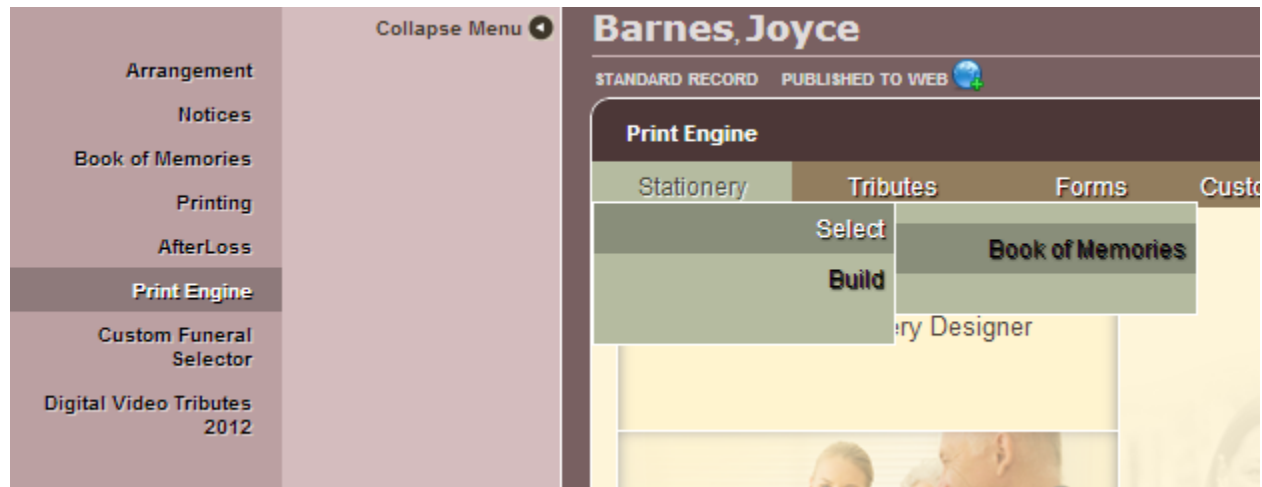
- [Book of Memories Stationery](#)
- [Bass-Mollett Stationery](#)
- [Messenger Stationery](#)
- [W.L. Smith Stationery](#)
- [FAQs on Stationery](#)

[<< FAQ's on Management](#)

[Book of Memories Stationery >>](#)

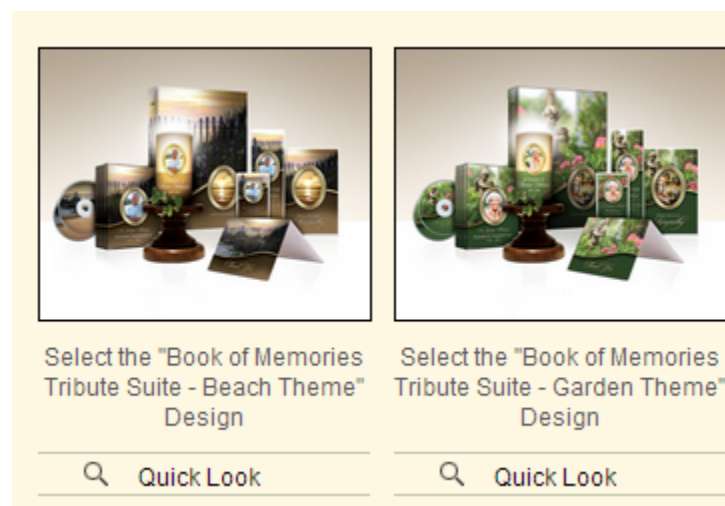
Book of Memories Stationery

Navigate to your Main tab and open a record. Navigate to Print Engine > Stationery > Select > Book of Memories.

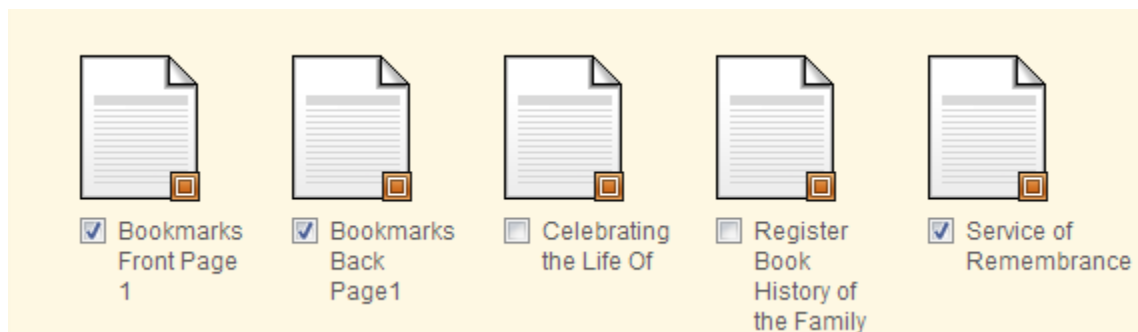


Building your Stationery

Choose the Book of Memories theme to print. To view a larger image of the Theme, click on Quick Look



Check which items to print, preview, or modify. You may select multiple items > Click Proceed.



* Before printing, make sure you have the correct paper size. All paper used is 8.5×11, however the perforation measurements may be different.

All selected items will appear on the left. Click on the item to Print or Modify. To see where the information for each field is coming from, mouse over the field. When, for example, you mouse over 'Kingston', the information pulls from "Disposition – city" within the record.



If no further modifications are required, Print.

Modify a Field

To modify or adjust a field > click Modify. To move a field, click on the field and drag it to new location. To modify the Format, Font Style, Size, Alignment, Photo Frame, Color and Text Effect of the fields, click on the field and choose from the options.



Deceased's Photo

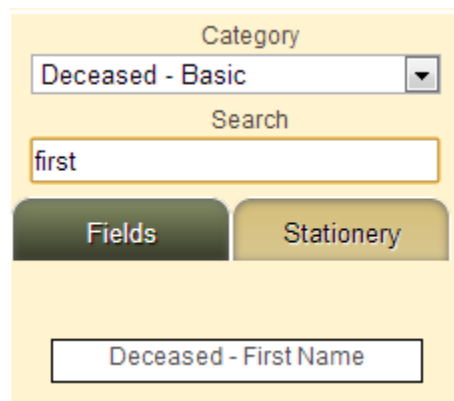
To change the frame around the photo, click on the photo > BOM Oval Dropdown > Select new frame.

✿ To Modify multiple fields at one time, click on a field – hold down the shift key – click on the rest of the fields to modify.

Add A New Field

Click Fields and enter text in the Search Bar. Drag the field and place it on the Stationery. The fields will automatically populate but only if the information has been entered in the record.

To help find a field in the Search Bar, choose a Category. Example below: Category > Deceased – Basic Information > first = “Deceased – First Name”.



The screenshot shows a user interface for adding a new field. At the top, there is a 'Category' dropdown menu with 'Deceased - Basic' selected. Below this is a 'Search' text input field containing the word 'first'. Under the search bar are two buttons: 'Fields' (highlighted in dark green) and 'Stationery' (light yellow). Below these buttons, a search result is displayed in a box: 'Deceased - First Name'.

To add text that doesn't pull from the record > Click Fields.

Change the Category to Static Fields: Choose 'Static Text' for one line of text; Choose Static Paragraph for a paragraph.

The screenshot shows a web interface for managing static fields. At the top, there is a 'Category' dropdown menu set to 'Static Fields'. Below it is a 'Search' input field. Two buttons, 'Fields' and 'Stationery', are visible. Below these buttons is a table listing various static fields:

Static Text
Static Text Block
Prayer
Static Date
Today's Date
Static Time

Drag the field to the Stationery. Right click on the field and click Edit. Enter a name (Label) and replace Static Text to the text of your choice. Preview changes at any time by clicking Preview

Enter Data

To change or modify data > Click Enter Data. Click the field to enter new information. Click on Save to Record

New fields can also be added in this section. (See instructions above). Preview changes at any time.

Prayers

To change a prayer > Click on Modify fields > Click on the Prayer and hit Delete on your keyboard.

Click on Fields > Change the Category to Static Fields > Click on Prayer and drag it onto the page.

Click on Insert Prayer > Choose a Category > Type in the name of the Prayer > Click Insert > Save.

Label:

Default Value:

Prayer

Insert Prayer

Save

Cancel

Title: 23rd Psalm

Category: Religious

23rd Psalm

The Lord is my Shepherd:
I shall not want
He maketh me to lie down in green
pastures:
He leadeth me beside the still
waters.

He restoreth my soul:
He leadeth me in the paths of
righteousness
for His name's sake.

Insert

Cancel

Previous

Next

[<< Stationery Printing](#)[Bass-Mollett Stationery >>](#)

Bass-Mollett Stationery

FrontRunner has worked with Bass-Mollett to leverage your single data entry solution to work seamlessly with the stationery offerings. Save time and money by utilizing the software to customize and print beautiful memorial products.



If you would like to have this activated in your system or you require more information about Bass-Mollett Stationery, please [contact your Success Coach](#).

- [Precious Memories](#)
- [Reflections of Life](#)
- [Reflections of Life Interior Pages](#)
- [Bass-Mollett Stationery Ordering](#)

[<< Book of Memories Stationery](#)

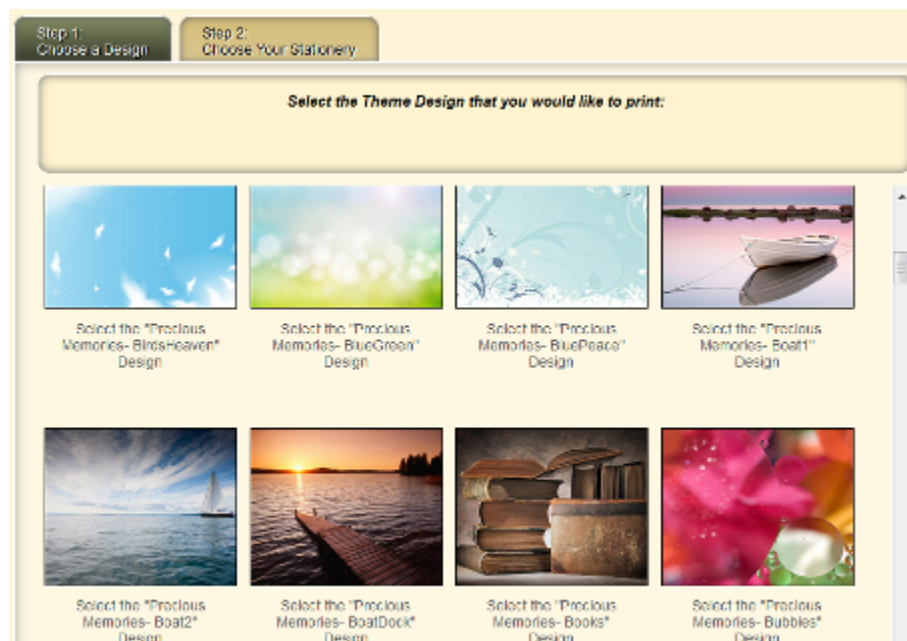
[Precious Memories >>](#)

Precious Memories

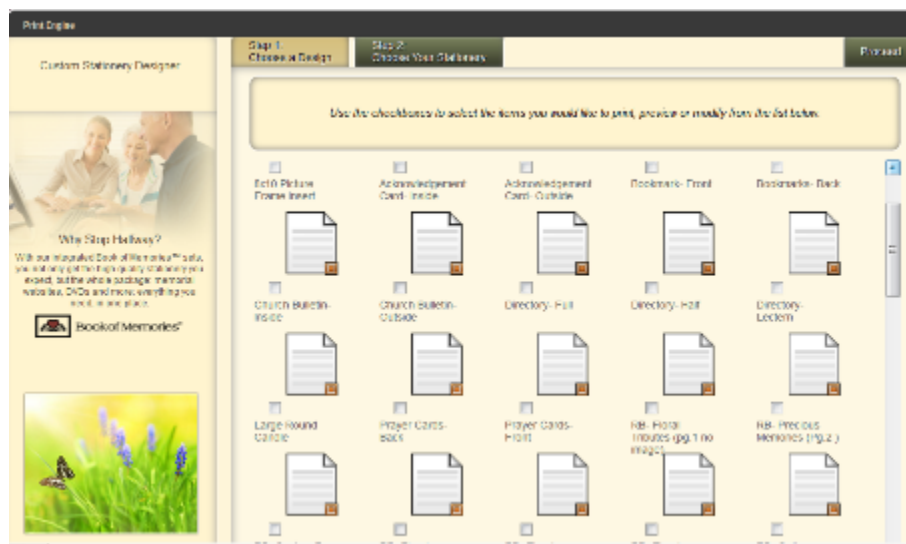
Navigate to your Main tab and open a record. Navigate to Print Engine > Stationery > Select > Bass-Mollett Precious Memories.



Choose a Design: Select the theme design to print.



Check which items to print, preview, or modify. You may select multiple items > Click Proceed.



Choose to open in a new window to access full-screen canvas. All selected items will appear on the left. Click on the item to Print or Modify. Mouse over fields to see where the information is pulling from in the record. When, for example, you mouse over 'Kingston', the information pulls from "Disposition – city" within the record.



If no further modifications are required, Print.

Modify a Field

To modify or adjust a field > click Modify. To move a field, click on the field and drag it to new location. To modify the Format, Font Style, Size, Alignment, Photo Frame, Color and Text Effect of the fields, click on the field and choose from the options.



Deceased's Photo

To change the frame around the photo, click on the photo > Image Frame.



- ✿ To Modify multiple fields at one time, click on a field – hold down the shift key – click on the rest of the fields to modify.

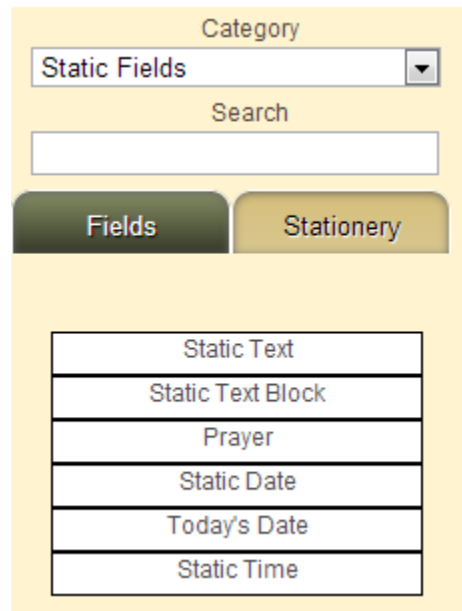
Add A New Field

Click Fields – enter text in the Search Bar. Drag the field and place it on the stationery. The fields will automatically populate ONLY IF the information has been entered in the record.

To help find a field in the Search Bar, choose a Category. Example below: Category > Deceased – Basic Information > first = “Deceased – First Name”.

A screenshot of a search interface. At the top, there is a 'Category' dropdown menu with 'Deceased - Basic' selected. Below it is a 'Search' text box containing the word 'first'. Under the search box are two buttons: 'Fields' and 'Stationery'. Below the buttons is a search result box containing the text 'Deceased - First Name'.

To add text that doesn't pull from the record, click Fields. Change the Category to Static Fields: Choose 'Static Text' for one line of text; Choose 'Static Text Block' for a paragraph.



The screenshot shows a web interface for managing static fields. At the top, there is a 'Category' dropdown menu set to 'Static Fields'. Below it is a 'Search' input field. Two buttons, 'Fields' and 'Stationery', are visible. Below the buttons is a table listing available static fields:

Static Text
Static Text Block
Prayer
Static Date
Today's Date
Static Time

Drag the field to the Stationery. Right click on the field and click Edit. Enter a name (Label) and replace Static Text to the text of your choice. Preview changes at any time

Enter Data

To change or modify data > Click Enter Data. Click the field to enter new information. Click on Save to Record. New fields can also be added in this section. (See instructions above) Preview changes at any time.

Add Prayer

Click on 'Edit' in top menu and choose 'Add Prayer' or right click on project and choose 'Add Prayer'. Click on 'Insert Prayer' to browse the available prayers in each of the 3 categories: Religious, General Child. Choose one of the categories and then click on 'Previous' or 'Next' to view.

Label:

Default Value:

Prayer

Insert Prayer

Save

Cancel

Title: 23rd Psalm

Category: Religious

23rd Psalm

The Lord is my Shepherd:
I shall not want
He maketh me to lie down in green
pastures:
He leadeth me beside the still
waters.

He restoreth my soul:
He leadeth me in the paths of
righteousness
for His name's sake.

Insert

Cancel

Previous

Next

Click on 'Insert' and the prayer will load on the left. The text can be edited from that box. Once complete, click on 'Save'. To modify the text, use the top menu: font, text size, color, etc. To change a prayer: Right click > Edit > Clear the Prayer (delete text) > Insert Prayer. Follow the steps above to add another prayer.



Note: If you would like to include a prayer that is not available in this selection, insert a 'Static Text Block'. Either write the prayer out or copy and paste from another source.

Add Image Element

Click on 'Edit' in top menu and choose 'Add Image Element'. Click on 'Select Image' to browse from the Poems or Structural categories. Click on 'Previous' and 'Next' to view.

Label:

Default Value: *I'd like the memory of me to be a happy one. I'd like to leave an **afterglow** of smiles when day is done. I'd like to leave an echo whispering softly down the ways. . . Of happy times, and **laughing** times, and bright and sunny days. I'd like the tears of those who grieve to dry before the sun. Of happy **memories** that I leave behind when day is done.*

Select Image

Save Cancel

Title:

Category:

Mother

In Memory of a Mother
 I remember thee in this solemn hour,
 my dear Mother. I remember the days
 when thou didst dwell on earth, and
 thy tender love watched over me like a
 guardian angel. Thou hast gone from
 me, but the bond which unites our
 souls can never be severed; thine image
 lives within my heart. May the
 merciful Father reward thee for the
 faithfulness and kindness thou hast
 ever shown me; may He lift up the
 light of His countenance upon thee
 and grant thee eternal peace. Amen

Insert Cancel Previous Next

Label:

Default Value: *I'd like the memory of me to be a happy one. I'd like to leave an **afterglow** of smiles when day is done. I'd like to leave an echo whispering softly down the ways. . . Of happy times, and **laughing** times, and bright and sunny days. I'd like the tears of those who grieve to dry before the sun. Of happy **memories** that I leave behind when day is done.*


Select Image

Save Cancel

Title:

Category:

Arrow Left



Insert Cancel Previous Next

Click on 'Insert' and 'Save' to add to the stationery. The text is not editable but it can be re-positioned on the stationery by dragging and dropping. The field can be expanded or minimized by grabbing and dragging the corner boxes of the image element.

Click on 'Preview' to ensure the layout and text is correct. Click on 'Modify fields' to return to editing screen. Click on 'Print' when ready.

[<< Bass-Mollett Stationery](#)

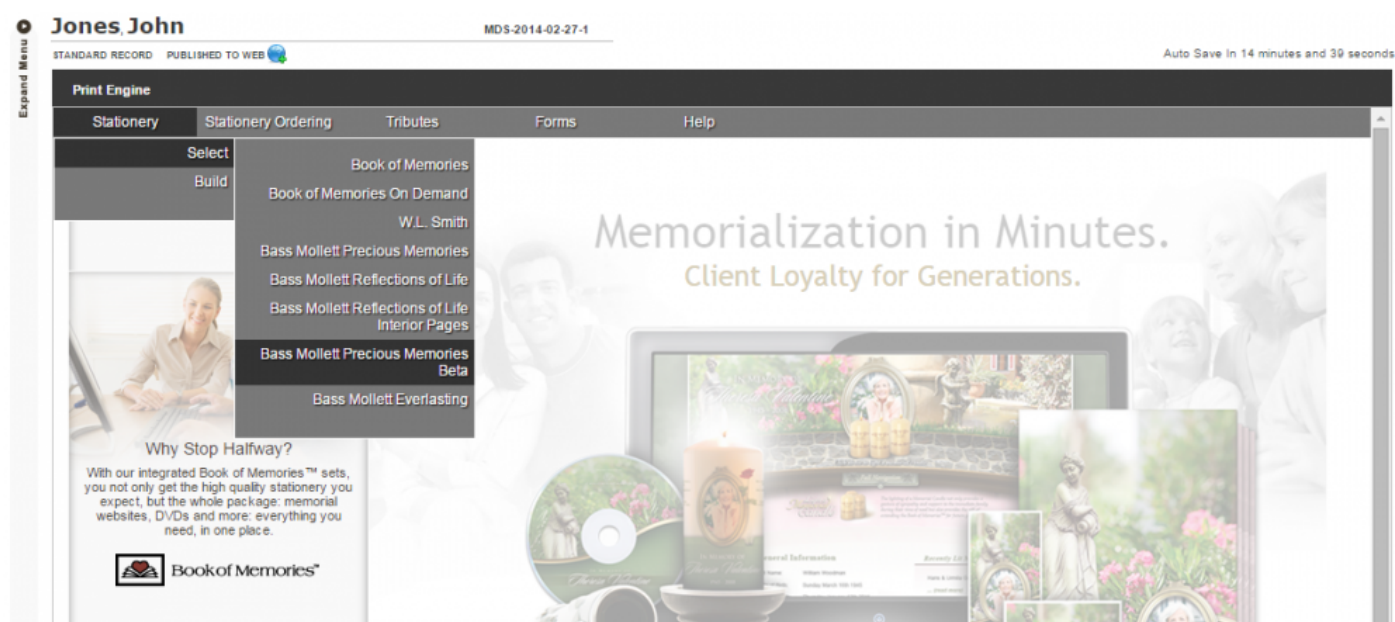
[Precious Memories – Beta >>](#)

Precious Memories – Beta

The Bass-Mollett Precious Memories – Beta version contains three new features:

- **Save a Local Copy** – Make a modified copy of our master template, which will be available for all Precious Memories designs.
- **Save Custom Setting** – Save a customized piece of stationery to a record. (This will only be available in the record where it is saved.)
- **Print to PDF/Multi-Page PDF Print** – Print files can be saved as PDFs instead of printed directly to the printer with Java. The multi-page option will create a multi-page PDF of stationery pieces and each page will keep its appropriate sizing and orientation.

In the print engine, go to **Stationery> Select > Bass-Mollett Precious Memories Beta**



Make a Local Copy

From the menu on the far left, select the button for “Make a Local Copy of Precious Memories Stationery”. This will set up the system to save your own templates. This process may take a few moments.

Jones, John MDS-2014-02-27-1
STANDARD RECORD PUBLISHED TO WEB Auto Save In 7 minutes and 9 seconds

Print Engine
Stationery Stationery Ordering Tributes Forms Help

Custom Stationery Designer

Step 1: Choose a Design **Step 2: Choose Your Stationery**

Select the Theme Design that you would like to print:

Why Stop Halfway?
With our integrated Book of Memories™ sets, you not only get the high quality stationery you expect, but the whole package: memorial websites, DVDs and more: everything you need, in one place.

Book of Memories™

Make a Local Copy of Precious Memories Stationery

Select the "Precious Memories- Acrylic" Design Local

Select the "Precious Memories- ADayPark" Design Local

Select the "Precious Memories- Baking" Design Local

Select the "Precious Memories- Baseball" Design Local

Select the "Precious Memories- Beach" Design Local

Select the "Precious Memories- BeachHeaven" Design Local

Select the "Precious Memories- BeigeBeauty" Design Local

Select the "Precious Memories- BirdsHeaven" Design Local

Log Out Jones, John

Jones, John MDS-2014-02-27-1
STANDARD RECORD PUBLISHED TO WEB Auto Save In 3 minutes and 57 seconds

Print Engine
Stationery Stationery Ordering Tributes Forms Help

Custom Stationery Designer

Step 1: Choose a Design **Step 2: Choose Your Stationery**

Making Local Copy of all Precious Memory Stationery Sets! This may take a while.

Why Stop Halfway?
With our integrated Book of Memories™ sets, you not only get the high quality stationery you expect, but the whole package: memorial websites, DVDs and more: everything you need, in one place.

- Select the stationery design theme by clicking on the design.
- Select the starter page to make an edited template by check marking the box.
- Select "Copy all selected Stationery Pages" on the left.

Jones, John MDS-2014-02-27-1

STANDARD RECORD PUBLISHED TO WEB Auto Save In 48 seconds

Print Engine

Stationery Stationery Ordering Tributes Forms Help

Custom Stationery Designer

Step 1: Choose a Design Step 2: Choose Your Stationery Proceed

Use the checkboxes to select the items you would like to print, preview or modify from the list below:

<input checked="" type="checkbox"/> 8x10 Picture Frame Insert	<input type="checkbox"/> Acknowledgement Card- Inside	<input type="checkbox"/> Acknowledgement Card- Inside- (copy)	<input type="checkbox"/> Acknowledgement Card- Outside	<input type="checkbox"/> Bookmark- Front
<input type="checkbox"/> Bookmark- Front- (copy)	<input type="checkbox"/> Bookmarks- Back	<input type="checkbox"/> Bookmarks- Back- (copy)	<input type="checkbox"/> Church Bulletin- Inside	<input type="checkbox"/> Church Bulletin- Outside

*A new page has been added, which has "local" written in red. This is the editable template. *

Jones, John MDS-2014-02-27-1

STANDARD RECORD PUBLISHED TO WEB Auto Save In 14 minutes and 9 seconds

Print Engine

Stationery Stationery Ordering Tributes Forms Help

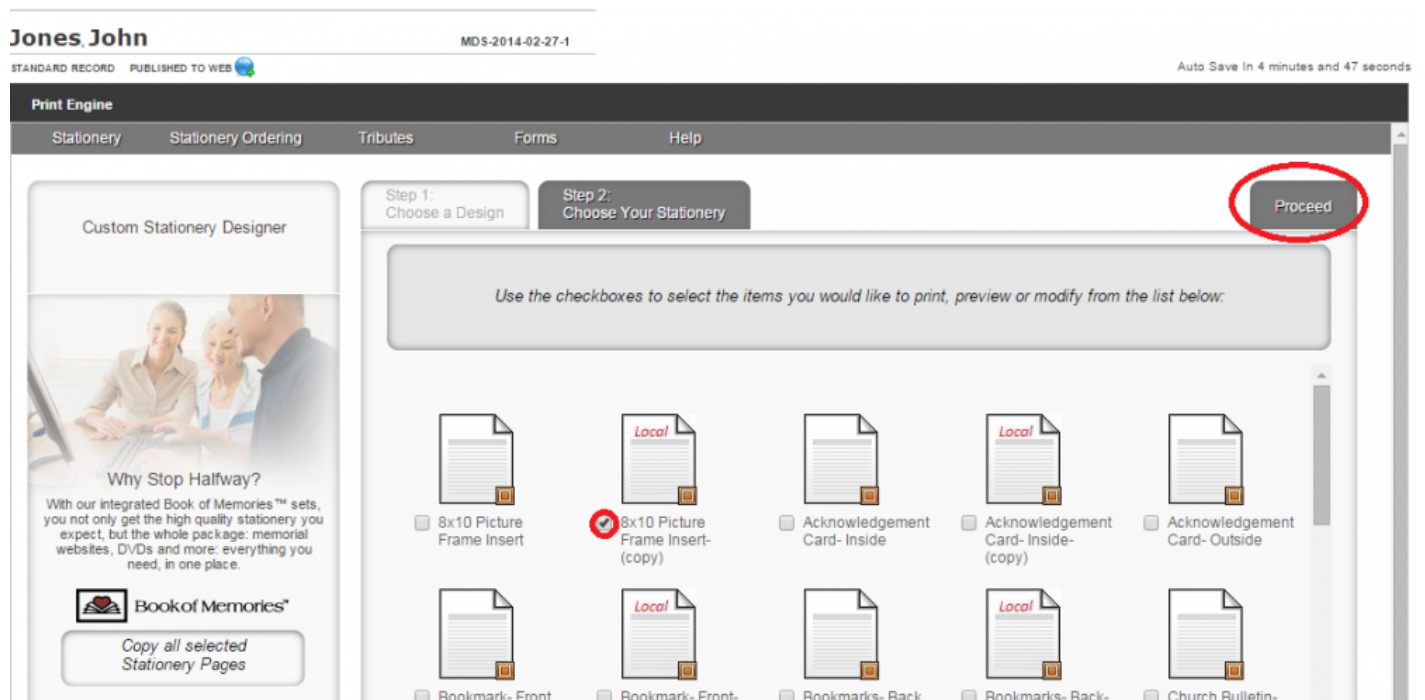
Custom Stationery Designer

Step 1: Choose a Design Step 2: Choose Your Stationery Proceed

Use the checkboxes to select the items you would like to print, preview or modify from the list below:

<input type="checkbox"/> 8x10 Picture Frame Insert	<input checked="" type="checkbox"/> Local 8x10 Picture Frame Insert- (copy)	<input type="checkbox"/> Acknowledgement Card- Inside	<input type="checkbox"/> Local Acknowledgement Card- Inside- (copy)	<input type="checkbox"/> Acknowledgement Card- Outside
<input type="checkbox"/> Bookmark- Front	<input type="checkbox"/> Local Bookmark- Front- (copy)	<input type="checkbox"/> Bookmarks- Back	<input type="checkbox"/> Local Bookmarks- Back- (copy)	<input type="checkbox"/> Church Bulletin- Inside

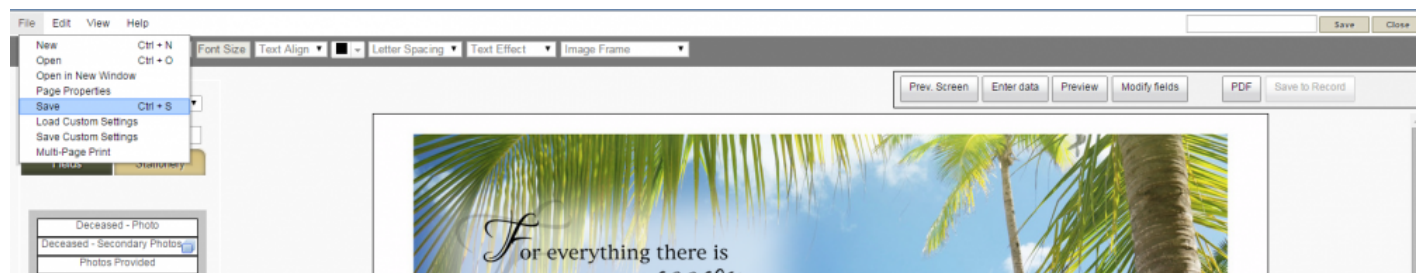
Open the new template by check marking the box and selecting proceed.



Make any changes to the base template for your new template. You can:

- Change fonts
- Change font colors
- Add/Remove fields
- Add/Remove photo(s)
- Add/Remove text
- Move elements

When finished, save the template by clicking on File > Save.



*This new template will now be available with any Precious Memories (Beta) design, in any record. Our master templates are always available as well. *

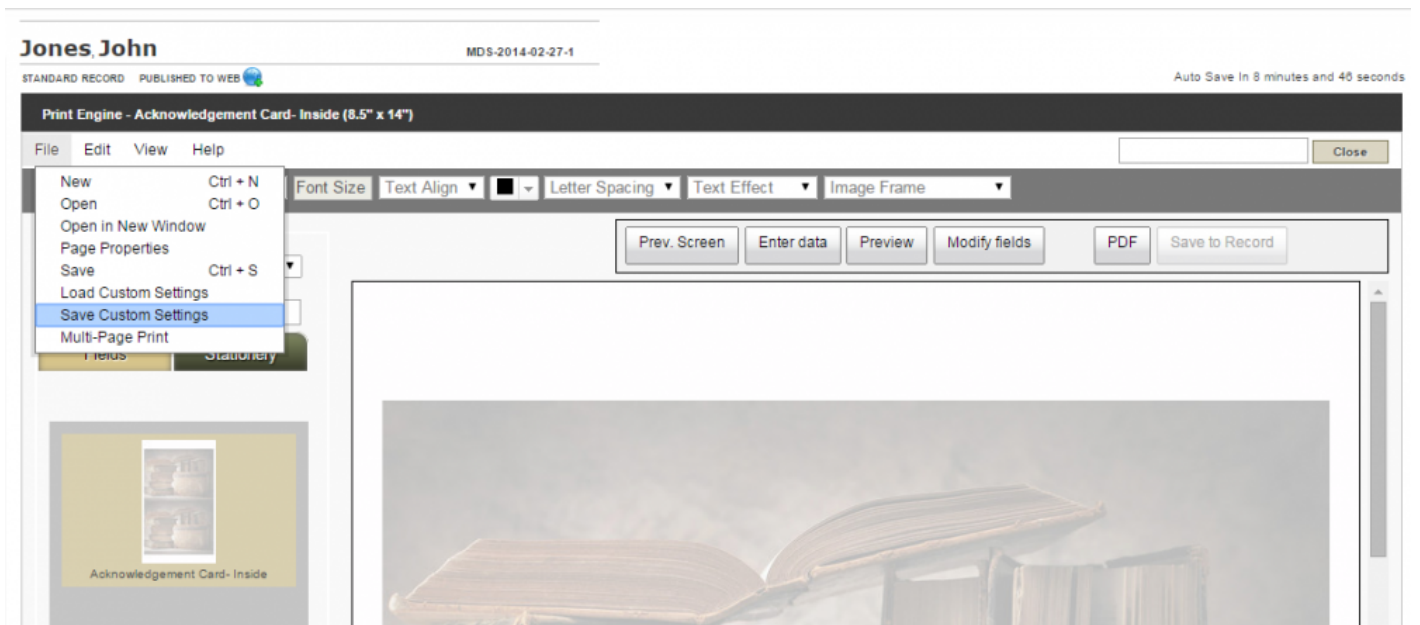
✿ Local Copy templates (modified templates) will have the word 'Local' written in red.

Save Custom Setting

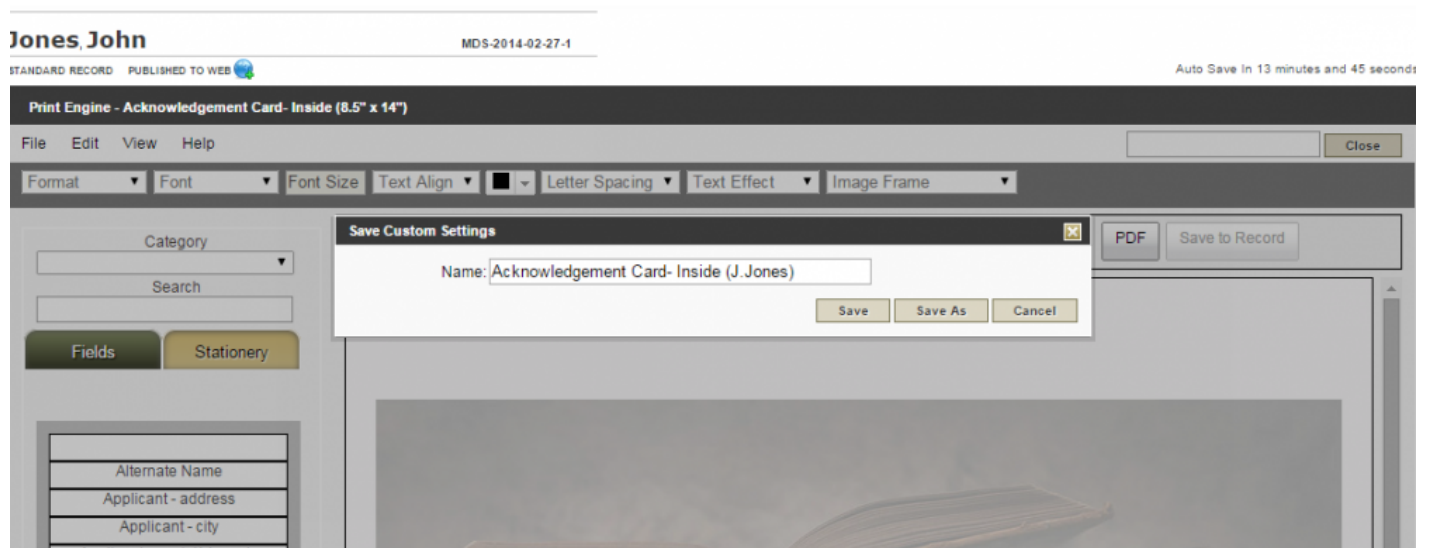
Select and open the applicable stationery set. Make necessary changes to the template.

✿ These changes will only be available on this deceased's record.

Select File> Save Custom Settings.

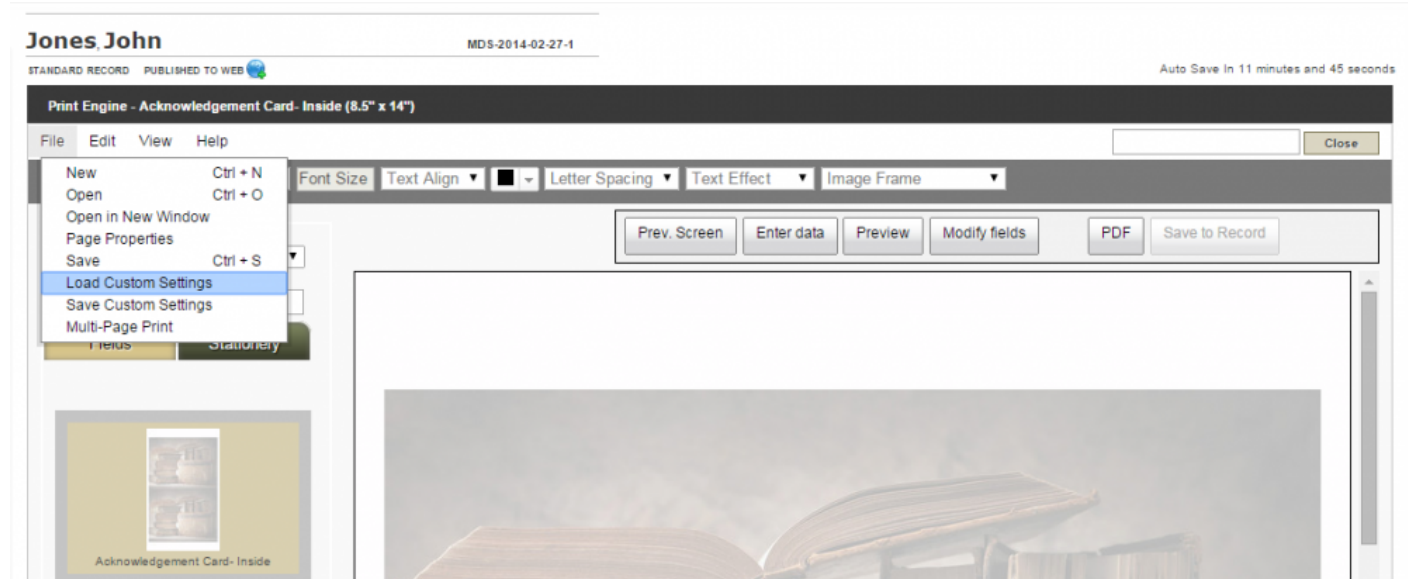


Provide a name for the custom setting. Save.

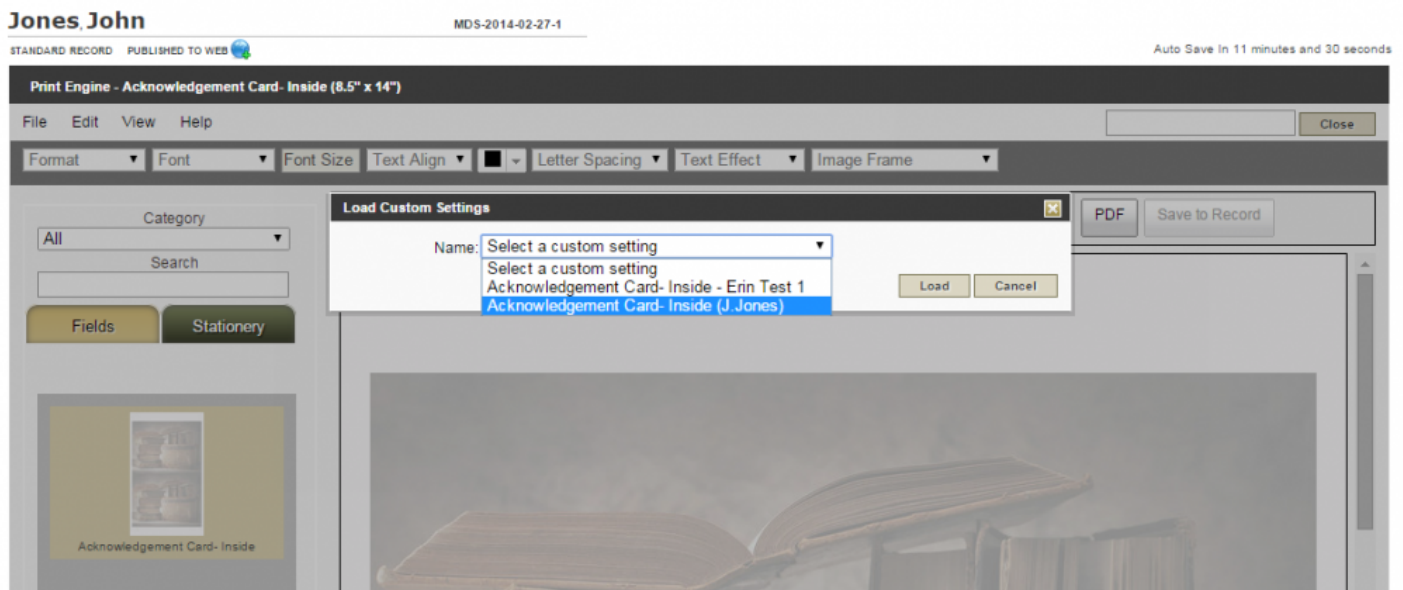


When you return to this stationery set at a later time, open the same page (ex. Acknowledgement card – inside) and then apply the custom settings created for the record.

To re-open custom settings: Open the stationery page that includes custom settings. Select File > Load Custom Setting.



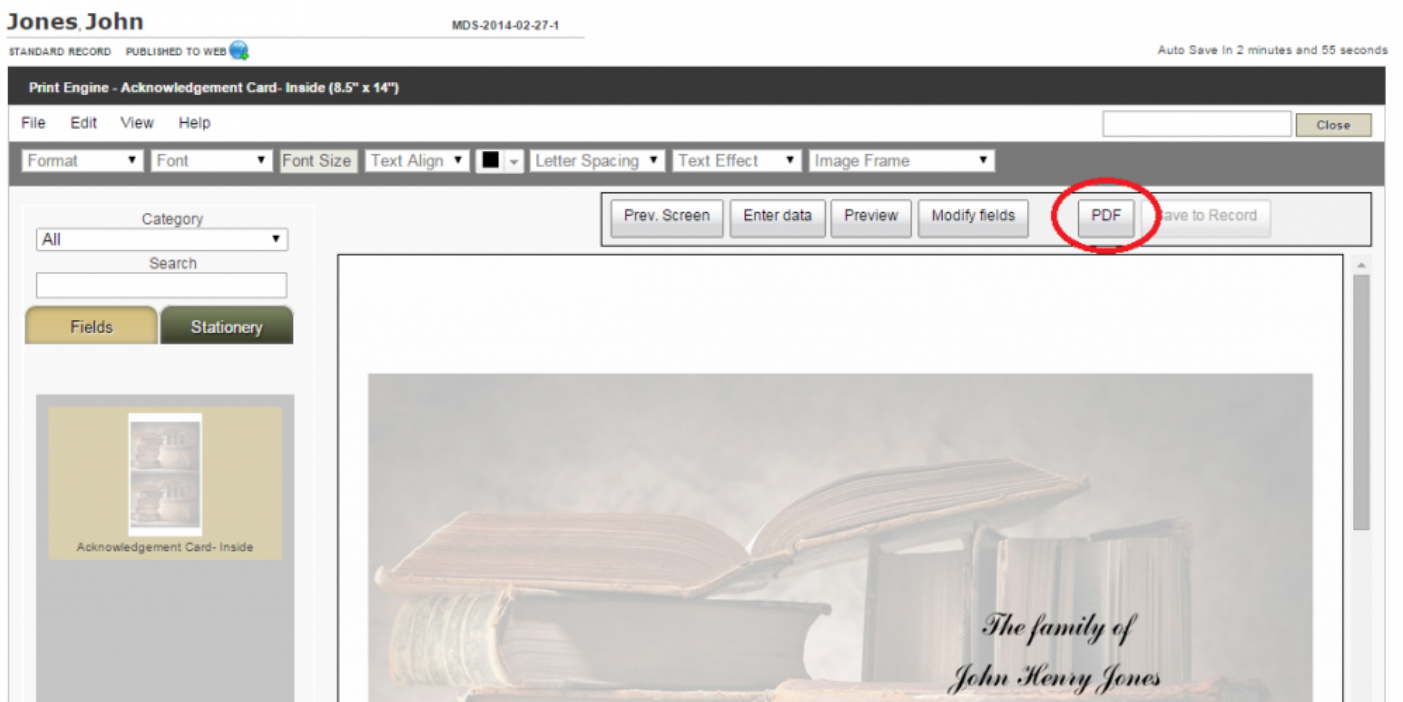
From the dropdown menu, select the custom setting to apply. Click Load.



Print to PDF

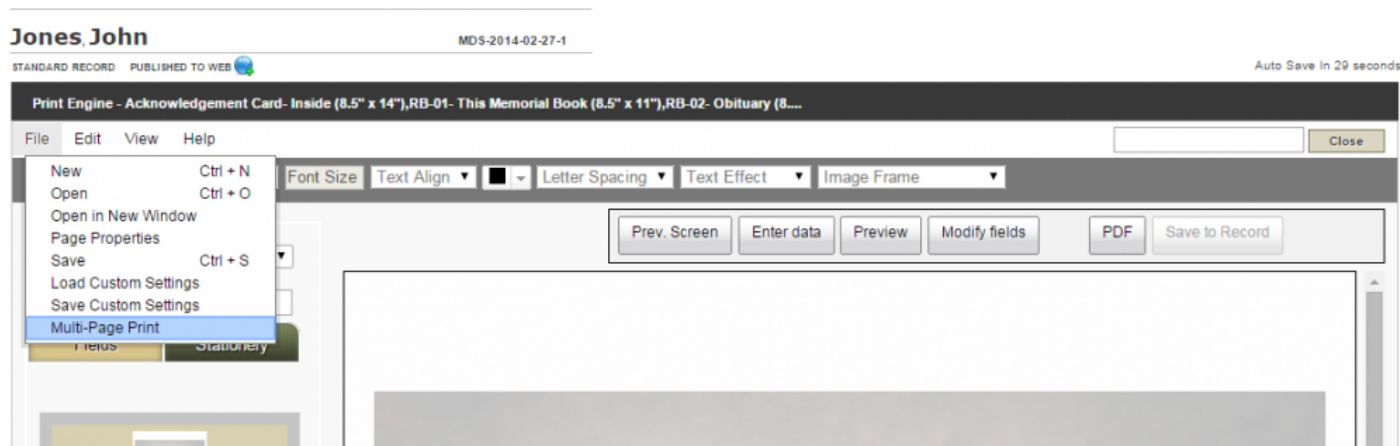
Single Page:

Select the PDF button at the upper right.

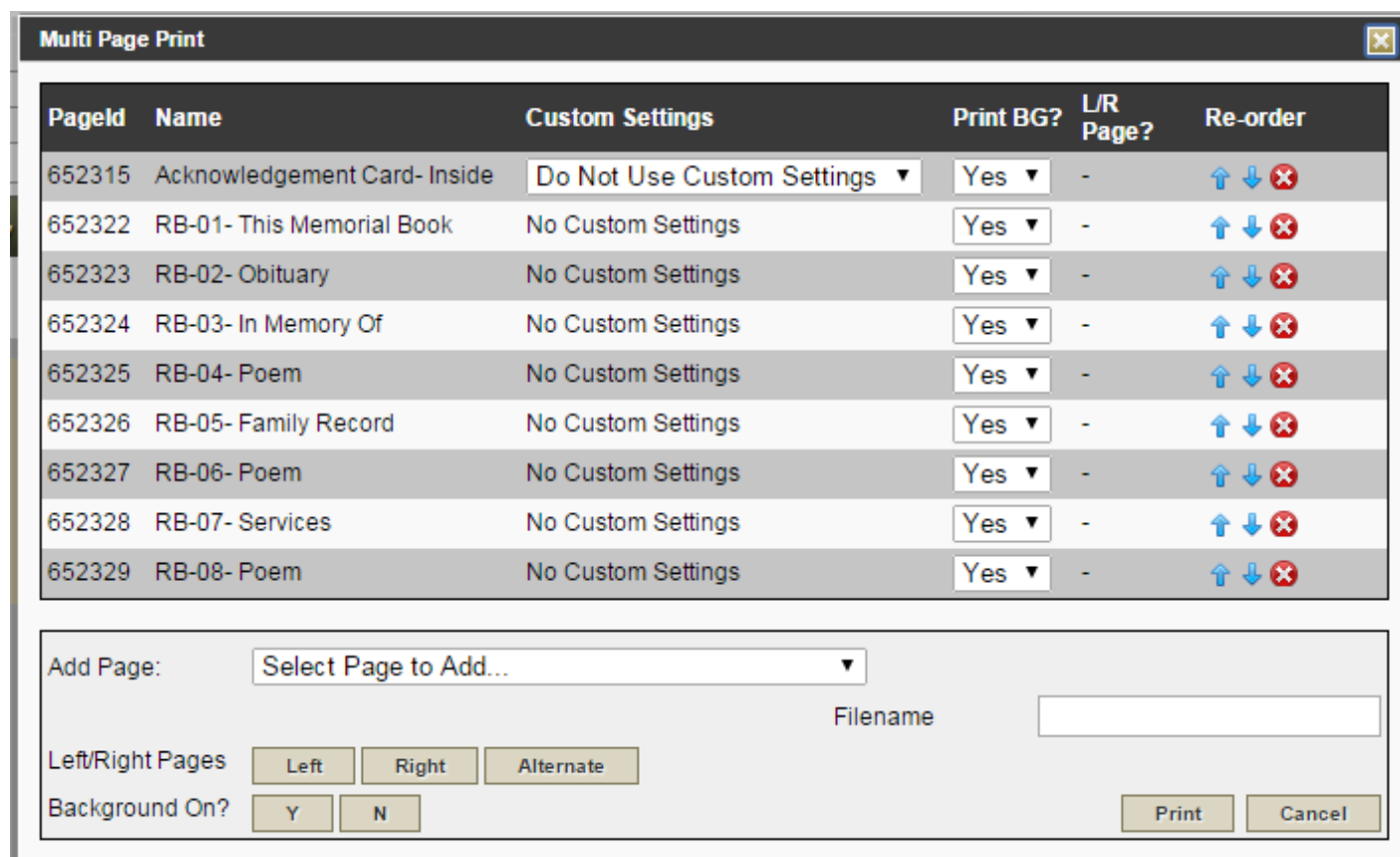


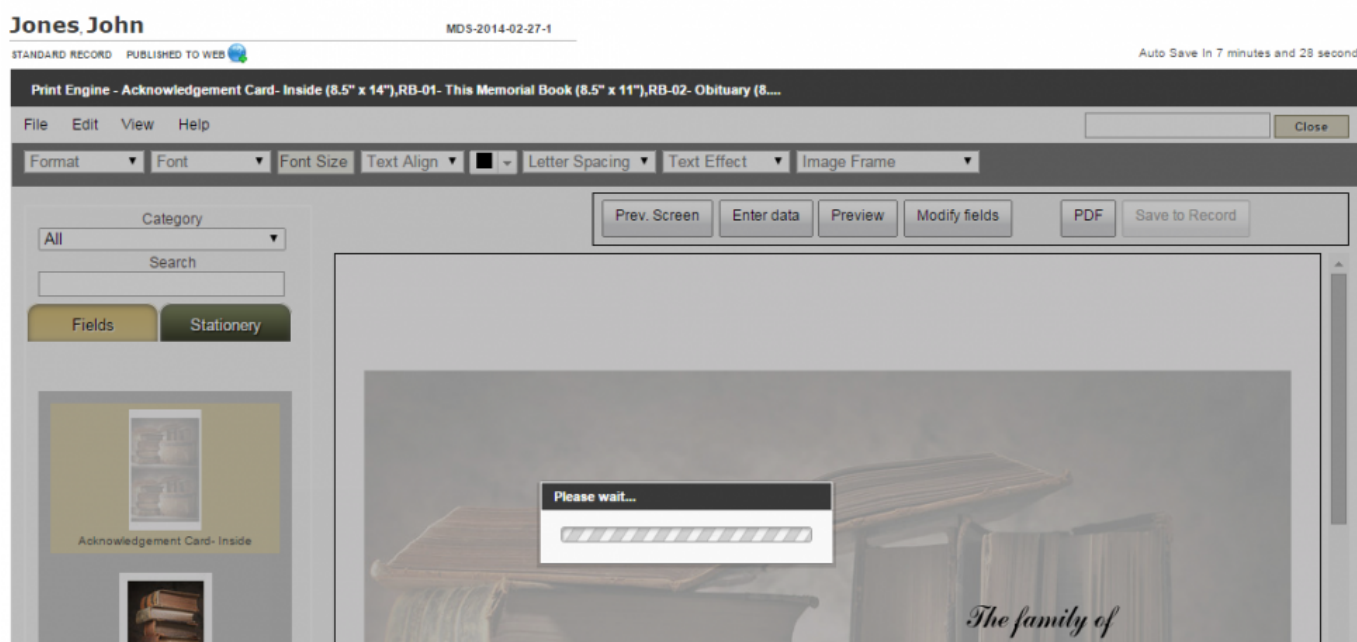
Multi-Page:

When multiple pages are open in a stationery set, they can all be saved to a PDF. Once all pages are completed, select File > Multi-Page Print.



This will open the multi-page print window for review of the entire file.





There are several options:

- Custom Settings – Once custom settings are saved to any pages, use the dropdown to select either the master template or the custom setting.
- Print BG- Turns on or off the ability to print the background image. For Precious Memories, choose 'yes' for the Print Background.
- L/R Page? For Reflections of Life stationery, this will allow the offset to run for register book pages that have an offset between the front and back of the page.
- Re-Order – Move pages up or down in the file. The "X" button will remove the page from the file.
- Add Page – Add a new page to the multi-page PDF file.
- Left/Right Pages – In cases where there is an offset, select whether to print all left-hand pages, all right-hand pages, or have it alternate LRLR for the offset. This will apply to the above pages
- Background On? Selecting Y or N will apply this setting to all pages
- Filename – Name the PDF file that will save to your computer.
- Print – Generates the PDF file.

Once print is selected, each page will filter through and build the PDF. How many pages are contained in the set will determine the time it takes to create the full PDF.

The PDF will download in the browser. Open the browser downloads folder (Ctrl + J) if it is not set to open automatically. If it does not appear, check the pop-up blocker for the file.

Jones, John MD5-2014-02-27-1

STANDARD RECORD PUBLISHED TO WEB Auto Save in 5 minutes and 32 seconds

Print Engine - Acknowledgement Card- Inside (8.5" x 14"), RB-01- This Memorial Book (8.5" x 11"), RB-02- Obituary (8.5" x 11")

File Edit View Help

Format Font Font Size Text Align Letter Spacing Text Effect Image Frame

Category: All Search

Fields Stationery

Acknowledgement Card- Inside

RB-01- This Memorial Book

1 - 2 of 9

Prev. Screen Enter data Preview Modify fields PDF Save to Record

Crossing the Bar

Sunset and evening star
and one clear call for me!
And May there be no moaning of the bar,
when I put out to sea,

But such a tide as moving seems asleep,
too full for sound and foam,
When that which drew from out
the boundless deep
turns again home.

Log Out Jones, John

TestPrint1.pdf Defraggler

[<< Precious Memories](#)[Reflections of Life >>](#)

Reflections of Life

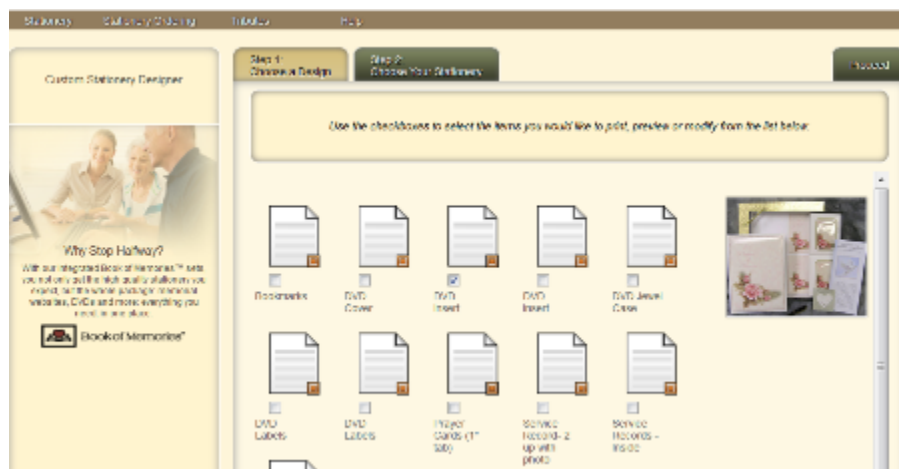
Navigate to your Main tab and open a record. Navigate to Print Engine > Stationery > Select > Bass-Mollett Reflections of Life.



Choose a Design: Select the theme design to print.



Choose your Stationery: Check which items to print, preview, or modify. You may select multiple items > Click Proceed.



Click on 'File' in top menu and choose 'Open in a New Window' to access the full-screen canvas. All selected items will appear on the left. Click on the item to Print or Modify. Mouse over fields to see where the information is pulling from in the record. When, for example, you mouse over 'Kingston', the information pulls from "Disposition – city" within the record.



If no further modifications are required, Print.

Modify a Field

To modify or adjust a field > click Modify. To move a field, click on the field and drag it to new location. To modify the Format, Font Style, Size, Alignment, Photo Frame, Color and Text Effect of the fields, click on the field and choose from the options.



Deceased's Photo

To change the frame around the photo, click on the photo > Image Frame.

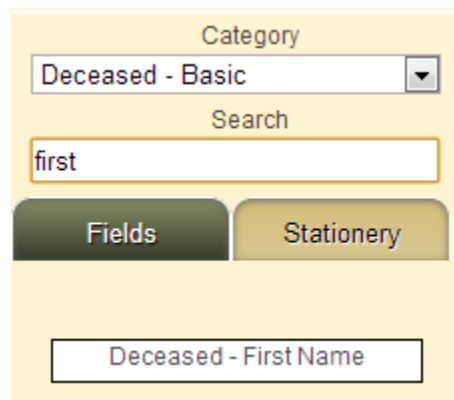


- ✿ To Modify multiple fields at one time, click on a field – hold down the shift key – click on the rest of the fields to modify.

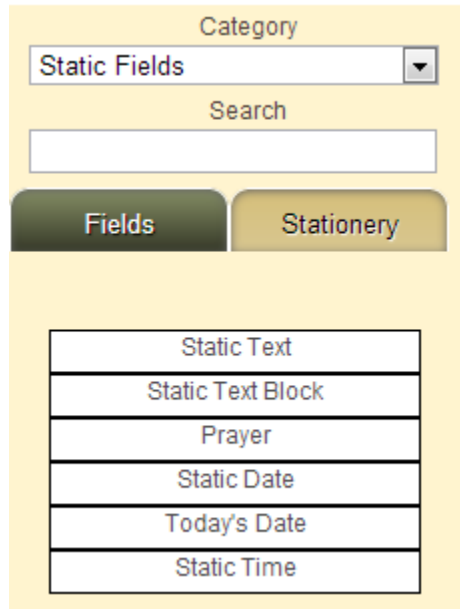
Add A New Field

Click Fields – enter text in the Search Bar. Drag the field and place it on the stationery. The fields will automatically populate ONLY IF the information has been entered in the record.

To help find a field in the Search Bar, choose a Category. Example below: Category > Deceased – Basic Information > first = “Deceased – First Name”.



To add text that doesn't pull from the record, click Fields. Change the Category to Static Fields: Choose 'Static Text' for one line of text; Choose 'Static Text Block' for a paragraph.



The screenshot shows a web interface for managing static fields. At the top, there is a 'Category' dropdown menu set to 'Static Fields'. Below it is a 'Search' input field. Two buttons, 'Fields' and 'Stationery', are visible. Below these buttons is a table listing available static fields.

Category
Static Fields

Search

Fields Stationery

Static Text
Static Text Block
Prayer
Static Date
Today's Date
Static Time

Drag the field to the Stationery. Right click on the field and click Edit. Enter a name (Label) and replace Static Text to the text of your choice. Preview changes at any time

Enter Data

To change or modify data > Click Enter Data. Click the field to enter new information. Click on Save to Record. New fields can also be added in this section. (See instructions above) Preview changes at any time.

Add Prayer

Click on 'Edit' in top menu and choose 'Add Prayer' or right click on project and choose 'Add Prayer'. Click on 'Insert Prayer' to browse the available prayers in each of the 3 categories: Religious, General Child. Choose one of the categories and then click on 'Previous' or 'Next' to view.

Label:

Default Value:

Prayer

Insert Prayer

Save

Cancel

Title: 23rd Psalm

Category: Religious

23rd Psalm

The Lord is my Shepherd:
I shall not want
He maketh me to lie down in green
pastures:
He leadeth me beside the still
waters.

He restoreth my soul:
He leadeth me in the paths of
righteousness
for His name's sake.

Insert

Cancel

Previous

Next

Click on 'Insert' and the prayer will load on the left. The text can be edited from that box. Once complete, click on 'Save'. To modify the text, use the top menu: font, text size, color, etc. To change a prayer: Right click > Edit > Clear the Prayer (delete text) > Insert Prayer. Follow the steps above to add another prayer.



Note: If you would like to include a prayer that is not available in this selection, insert a 'Static Text Block'. Either write the prayer out or copy and paste from another source.

Add Image Element

Click on 'Edit' in top menu and choose 'Add Image Element'. Click on 'Select Image' to browse from the Poems or Structural categories. Click on 'Previous' and 'Next' to view.

Label:

Default Value: *I'd like the memory of me to be a happy one. I'd like to leave an **afterglow** of smiles when day is done. I'd like to leave an echo whispering softly down the ways. . . Of happy times, and **laughing** times, and bright and sunny days. I'd like the tears of those who grieve to dry before the sun. Of happy **memories** that I leave behind when day is done.*

Select Image

Save Cancel

Title:

Category:

Mother

In Memory of a Mother
 I remember thee in this solemn hour,
 my dear Mother. I remember the days
 when thou didst dwell on earth, and
 thy tender love watched over me like a
 guardian angel. Thou hast gone from
 me, but the bond which unites our
 souls can never be severed; thine image
 lives within my heart. May the
 merciful Father reward thee for the
 faithfulness and kindness thou hast
 ever shown me; may He lift up the
 light of His countenance upon thee
 and grant thee eternal peace. Amen

Insert Cancel Previous Next

Label:

Default Value: *I'd like the memory of me to be a happy one. I'd like to leave an **afterglow** of smiles when day is done. I'd like to leave an echo whispering softly down the ways. . . Of happy times, and **laughing** times, and bright and sunny days. I'd like the tears of those who grieve to dry before the sun. Of happy **memories** that I leave behind when day is done.*


Select Image

Save Cancel

Title:

Category:

Arrow Left



Insert Cancel Previous Next

Click on 'Insert' and 'Save' to add to the stationery. The text is not editable but it can be re-positioned on the stationery by dragging and dropping. The field can be expanded or minimized by grabbing and dragging the corner boxes of the image element.

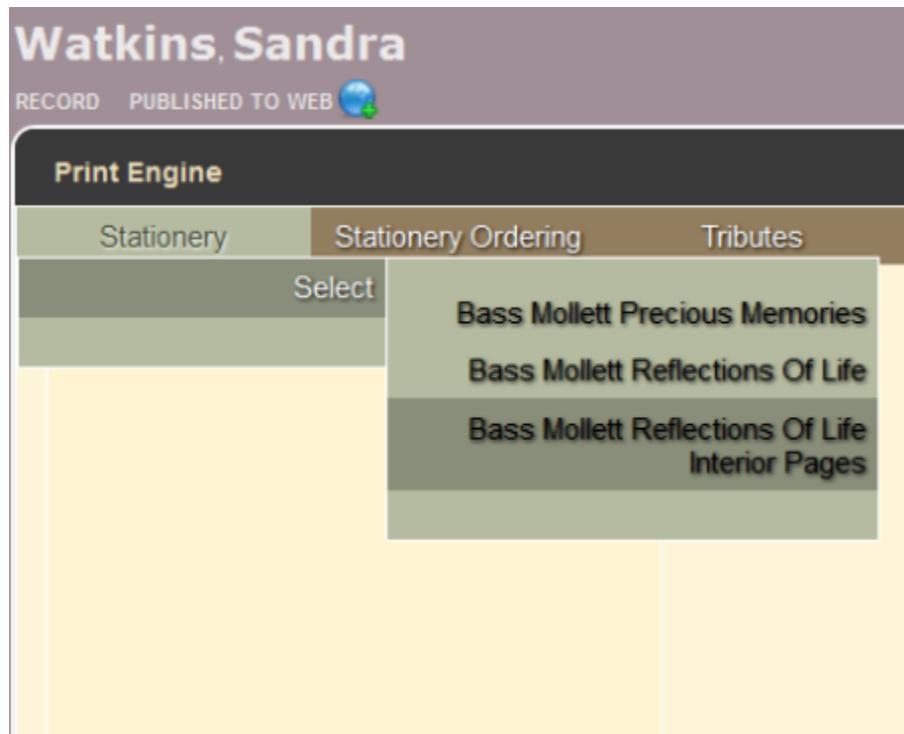
Click on 'Preview' to ensure the layout and text is correct. Click on 'Modify fields' to return to editing screen. Click on 'Print' when ready.

[<< Precious Memories – Beta](#)

[Reflections of Life Interior Pages >>](#)

Reflections of Life Interior Pages

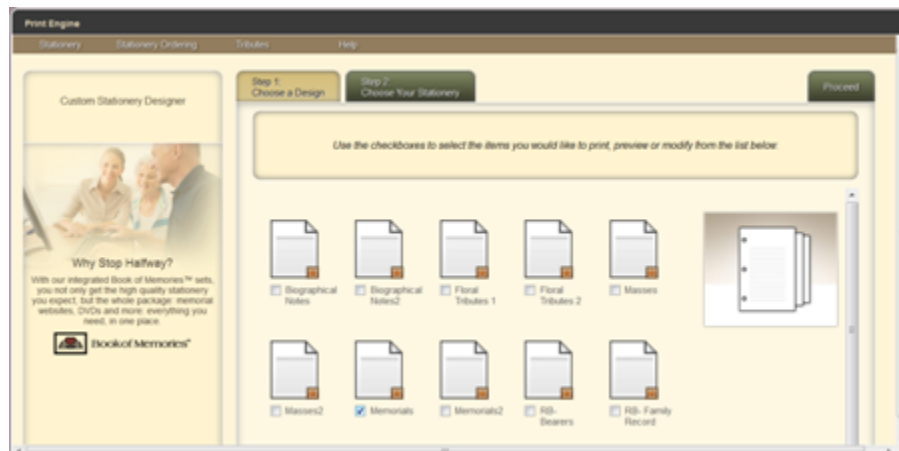
Navigate to your Main tab and open a record. Navigate to Print Engine > Stationery > Select > Bass-Mollett Precious Memories.



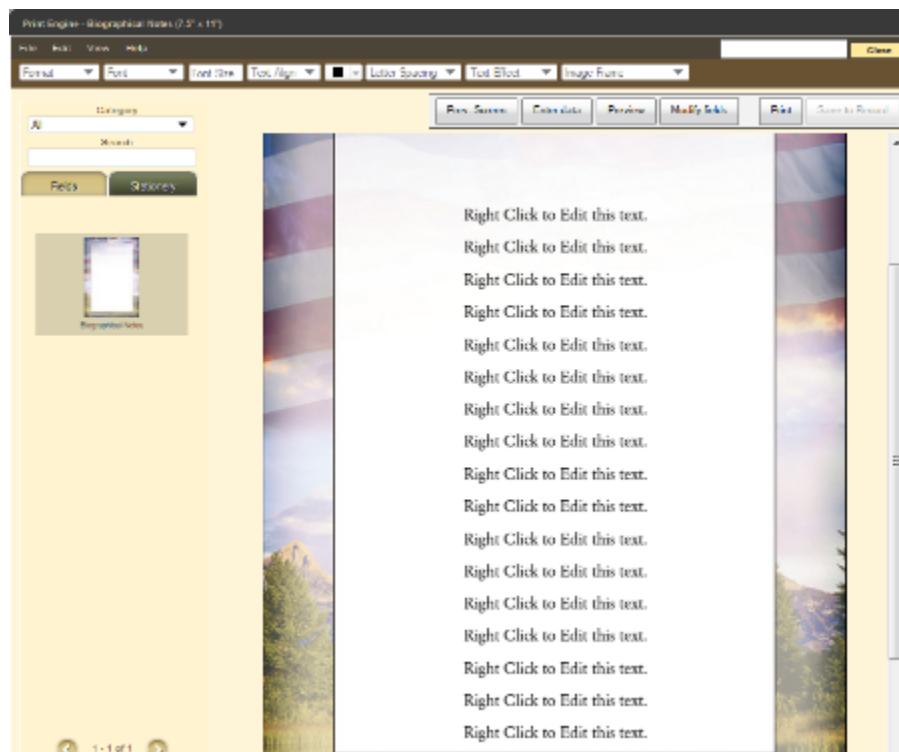
Choose a Design: Select the theme design to print.



Check which items to print, preview, or modify. You may select multiple items > Click Proceed.



Choose to open in a new window to access full-screen canvas. All selected items will appear on the left. Click on the item to Print or Modify.



Mouse over fields to see where the information is pulling from in the record. When, for example, you mouse over 'Kingston', the information pulls from "Disposition – city" within the record.



If no further modifications are required, Print.

Modify a Field

- To modify or adjust a field > click Modify
- To move a field, click on the field and drag it to new location.
- To modify the Format, Font Style, Size, Alignment, Photo Frame, Color and Text Effect of the fields, click on the field and choose from the options.



Deceased's Photo

To change the frame around the photo, click on the photo > Image Frame.



To Modify multiple fields at one time, click on a field – hold down the shift key – click on the rest of the fields to modify.

Add a New Field

Click Fields and enter text in the Search Bar. Drag the field and place it on the stationery. The fields will automatically populate ONLY IF the information has been entered in the record. To help find a field in the Search Bar, choose a Category. Example below: Category > Deceased – Basic Information > first = “Deceased – First Name”.

Category
Deceased - Basic

Search
first

Fields Stationery

Deceased - First Name

To add text that doesn't pull from the record, click Fields. Change the Category to Static Fields: Choose 'Static Text' for one line of text; Choose 'Static Text Block' for a paragraph.

Category
Static Fields

Search

Fields Stationery

Static Text
Static Text Block
Prayer
Static Date
Today's Date
Static Time

Drag the field to the Stationery. Right click on the field and click Edit. Enter a name (Label) and replace Static Text to the text of your choice. Preview changes at any time.

Enter Data

To change or modify data > Click Enter Data. Click the field to enter new information. Click on Save to Record. New fields can also be added in this section. (See instructions above). Preview changes at any time

Add Prayer

Click on 'Edit' in top menu and choose 'Add Prayer' or right click on project and choose 'Add Prayer'. Click on 'Insert Prayer' to browse the available prayers in each of the 3 categories: Religious, General Child. Choose one of the categories and then click on 'Previous' or 'Next' to view.

The screenshot shows a software interface for adding a prayer. It consists of two main panels. The left panel contains a 'Label:' text box, a 'Default Value:' text box with the word 'Prayer' inside, and an 'Insert Prayer' button. The right panel displays the details of a selected prayer. It has a 'Title:' field with '23rd Psalm' and a 'Category:' dropdown menu set to 'Religious'. Below this, the text of the 23rd Psalm is shown in a monospaced font. At the bottom of the right panel are four buttons: 'Insert', 'Cancel', 'Previous', and 'Next'.

Click on 'Insert' and the prayer will load on the left. The text can be edited from that box. Once complete, click on 'Save'. To modify the text, use the top menu: font, text size, color, etc. To change a prayer: Right click > Edit > Clear the Prayer (delete text) > Insert Prayer. Follow the steps above to add another prayer.

* Note: If you would like to include a prayer that is not available in this selection, insert a 'Static Text Block'. Either write the prayer out or copy and paste from another source.

Add Image Element

Click on 'Edit' in top menu and choose 'Add Image Element'. Click on 'Select Image' to browse from the Poems or Structural categories. Click on 'Previous' and 'Next' to view.

Label:

Default Value: *I'd like the memory of me to be a happy one. I'd like to leave an **afterglow** of smiles when day is done. I'd like to leave an echo whispering softly down the ways. . . Of happy times, and **laughing** times, and bright and sunny days. I'd like the tears of those who grieve to dry before the sun. Of happy **memories** that I leave behind when day is done.*

Select Image

Save Cancel

Title:

Category:

Mother

In Memory of a Mother
I remember thee in this solemn hour, my dear Mother. I remember the days when thou didst dwell on earth, and thy tender love watched over me like a guardian angel. Thou hast gone from me, but the bond which unites our souls can never be severed; thine image lives within my heart. May the merciful Father reward thee for the faithfulness and kindness thou hast ever shown me; may He lift up the light of His countenance upon thee and grant thee eternal peace. Amen

Insert Cancel Previous Next

Label:

Default Value: *I'd like the memory of me to be a happy one. I'd like to leave an **afterglow** of smiles when day is done. I'd like to leave an echo whispering softly down the ways. . . Of happy times, and **laughing** times, and bright and sunny days. I'd like the tears of those who grieve to dry before the sun. Of happy **memories** that I leave behind when day is done.*


Select Image

Save Cancel

Title:

Category:

Arrow Left



Insert Cancel Previous Next

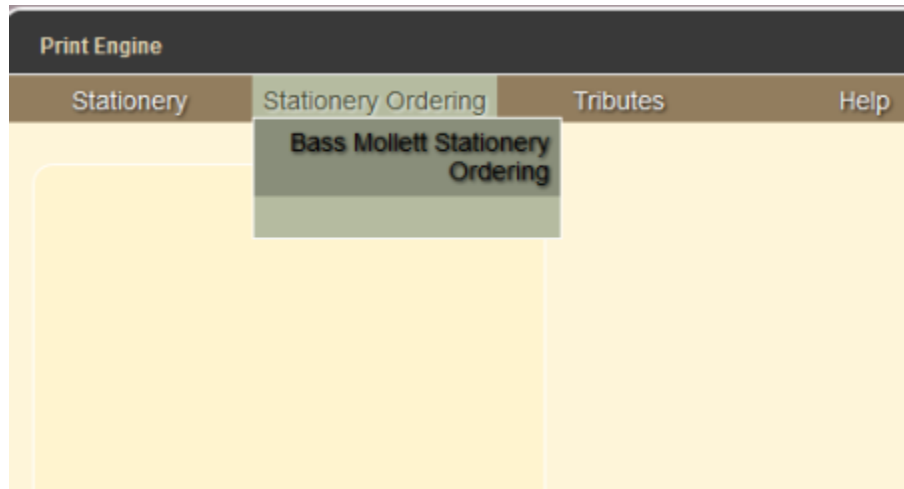
Click on 'Insert' and 'Save' to add to the stationery. The text is not editable but it can be re-positioned on the stationery by dragging and dropping. The field can be expanded or minimized by grabbing and dragging the corner boxes of the image element. Click on 'Preview' to ensure the layout and text is correct. Click on 'Modify fields' to return to editing screen. Click on 'Print' when ready.

[<< Reflections of Life](#)

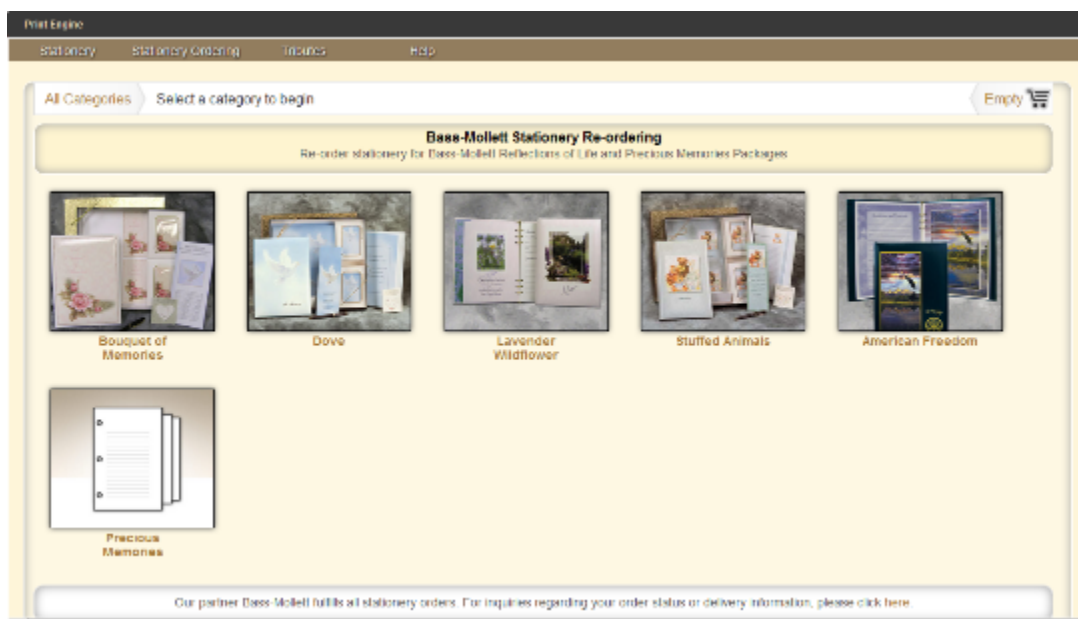
[Bass-Mollett Stationery Ordering >>](#)

Bass-Mollett Stationery Ordering

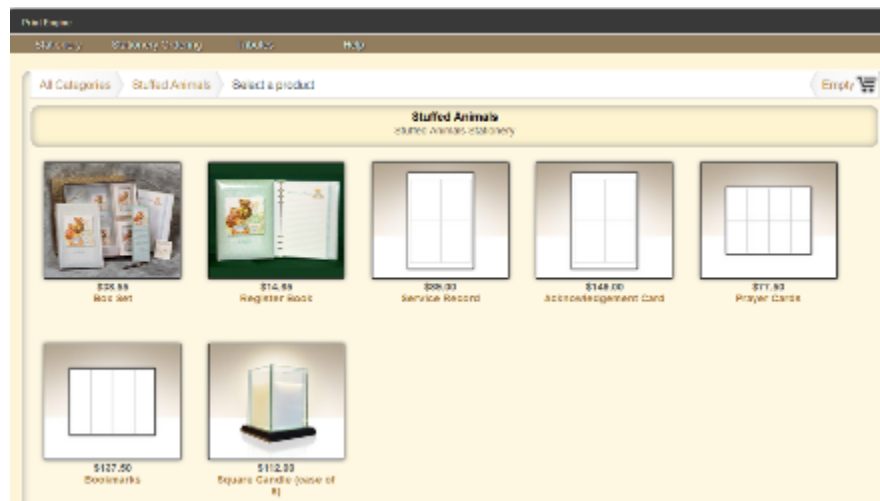
Navigate to the Main tab and open a record. Navigate to Print Engine > Stationery Ordering > Bass-Mollett Stationery Ordering.



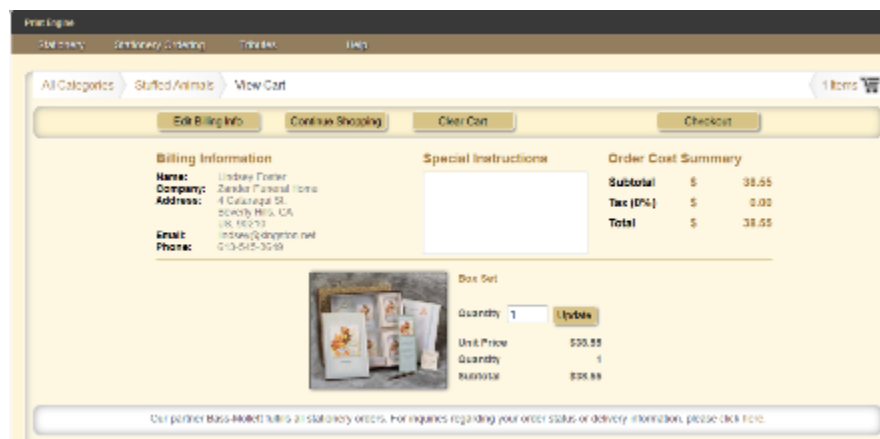
Select a category.



Select a product.



Add to Cart – Enter the Quantity and then ‘Add to Cart’.



Check Billing Information – add Special Instructions, if necessary. Update the quantity, if necessary. When all information is correct, choose to ‘Continue Shopping’ or ‘Checkout’. The final step will be to ‘Proceed to Payment’. Bass-Mollett fulfills all stationery orders. For inquiries regarding your order status or delivery information, [please click here](#).

[<< Reflections of Life Interior Pages](#)

[Messenger Stationery >>](#)

Messenger Stationery

Messenger gives Funeral Homes the ability to easily create and print high quality, professional looking and highly personal memorial products within a matter of minutes! Messenger and FrontRunner have partnered allowing you to quickly export your client data and import it into your Messenger program.



If you would like to activate in your system, [contact your FrontRunner Success Coach](#).

Stationery Printing

Open a record > Printing > Messenger Export.

Select the 'Export to Messenger' button.

Open your "Make It Personal" software from Messenger and click the 'Import From Management Software' button.

Click 'Browse' and locate the XML file on your computer downloaded from the FrontRunner system. The file will likely be contained in your computer's download folder unless you saved it to another location.



The image shows a software dialog box titled "Import Case Profile" in a cursive font. The dialog has a dark blue header bar. Below the header, the text "Select a location:" is followed by a text input field with a dropdown arrow on the right. Below the input field is a blue button with the text "...Browse" in a cursive font. At the bottom right of the dialog are two buttons: a grey "CANCEL" button and a blue "UPLOAD" button. A mouse cursor is pointing at the space between the "...Browse" button and the "CANCEL" button.

Begin using the Make it Personal Program with the new data.

[<< Bass-Mollett Stationery Ordering](#)

[W.L. Smith Stationery >>](#)

W.L. Smith Stationery

Navigate to your Main tab and open a record. Navigate to Print Engine > Stationery > Select > W.L Smith.

You can now refer to the [Building Your Stationery](#) section to learn more about stationery printing and building.

[<< Messenger Stationery](#)

[FAQs on Stationery >>](#)

FAQs on Stationery

Question: How can I expand my working space so I can see more of the stationery?

Answer: The system embeds the stationery print engine within the software by default. If you would like a larger screen to work on, you can open the stationery print engine in a new window. To do so, open your stationery pages into the modify screen and click File > Open in new window. This will re-open all of your selected stationery pages into a new browser window and you will have increased working space.

Question: How do I print multiple pages at once?

Answer: To print multiple pages at once, you can utilize our “multi-page print” feature. To use this feature, open all of the stationery pages that you want to print, into the editor. Then go to File > Multi Page Print. A print configuration box will pop up which will allow you to re-arrange pages or delete a page. This feature will compile all stationery pages into a single PDF, which can be downloaded and printed.

Question: What Stationery Providers do you support?

Answer: FrontRunner currently has several providers available in our system. These providers include [BassMollett Publishers](#), [WL Smith and Associates](#), [Messenger](#), and [FrontRunner's own Print-On-Demand stationery](#).

Question: How do I get access to new stationery?

Answer: Simply contact your [Success Coach](#) and we would be happy to turn on additional stationery packages for you.

Question: Can FrontRunner build my stationery in the system for me?

Answer: FrontRunner can build in your commonly used stationery pieces into the system. Contact your [Success Coach](#) for details on requirements and pricing.

Question: How can I insert a poem/prayer?

Answer: Poems can be inserted two ways—one for pre-formatted poems (Bass-Mollett) and one for general text poems.

A pre-formatted Bass-Mollett poem can be added by navigating to Edit > Add Image Element. This will create a popup with a section called “poems. You can select from a variety of poems by clicking the “Next” button. Once you find a poem that will be used, click ‘Insert’.

To insert a simply text poem/prayer, open the stationery page that you would like to add the poem to, Right-click on the page, and click “Add Prayer”. A pop up box will appear where you can copy and paste a poem/prayer, or select one from our library via the “Next” button.

Question: How can I add my own text to the stationery?

Answer: There are two ways to add text to your stationery page:

1) Right click on the page and click “Add Text”. This will create a text box on the screen that can be edited. Right click on the Static Text box that you have created, then click ‘Edit’. You can add your content to the “Default Value” box, which will appear on your stationery.

2) The more common way to add text to your stationery is to pull a field from our existing library. To do this, click the “Fields” button on the left menu, search for the information you are looking to add (Example: Date of Death), and then click and drag that field onto the stationery page.

Question: How do I add a photo to the stationery?

Answer: To do this open your stationery page, click the “Fields” button on the left menu, search for the word ‘Photo’. Fields labelled ‘Deceased Photo’ and ‘Deceased Secondary Photo’ will appear. The ‘Deceased Photo’ field will pull the Primary photo of the deceased. The ‘Secondary Photos’ field can be dragged onto the stationery multiple times, and will pull a new photo of the deceased each time.

[<< W.L. Smith Stationery](#)

[Search Engine Optimization \(SEO\) >>](#)

Search Engine Optimization (SEO)

It's one thing to create and build a beautiful website filled with relevant information about your funeral firm's services and products, it's quite another to have online visitors find your site with ease. Search Engine Optimization (SEO) takes time but your efforts will pay off when your community can locate your website and contact your firm at their time of need.

Make sure to work on your [FrontRunner Settings](#) to help optimize your site.

The following are user-friendly Google tools that will further promote your online presence.

- [Google AdWords](#)
- [Google Analytics](#)
- [Google Places](#)

Here are some additional options to help enhance your SEO.

- [Domain & Sub-Domain Strategies](#)
- [Search Engine Strategies](#)
- [Search Engine Submission Options](#)

[<< FAQs on Stationery](#)

[FrontRunner Website Settings >>](#)

FrontRunner Website Settings

Make sure to work on your FrontRunner Settings to help optimize your website's Search Engine Optimization (SEO).

Website > Edit > Site > any page > Edit Details

- The Page Title field is located in the top section.
- The Search Keywords and Search Description fields are located in the Optional Settings section.
Enter keywords and keyword phrases (separated by a comma) and the description.

When performing a search, search engines use the Search Descriptions to display your page. The search result link will be your Browser Title (shown below, in red) and the sentence is pulled from the Search Description (shown below, in black).

Enter the word(s) you are looking for

Search Results 1 to 33 for *website*

[Frequently Asked Questions : FAQ's on Website Administration](#)

Website Administration 1. The changes I made to the website don't appear, what did I do wrong? 2. My website is down, help! 3. I am not receiving emails from visitors through the forms on my website. 4. I find that my sentences or paragraphs are spaced too f

[Website administration options.](#)

Website Administration Editing a Page: Learn about how to edit a page on your website. Introduction: View the different types of functions to use for web pages. Editing Headers & Footers: Learn how to edit the top and bottom portions of your web pages. Creating Pages: Learn how to create pages on your

Keywords

It is important to enter keywords on each and every website page. When deciding on keywords, ask yourself: How do I describe my funeral home? Google looks for keywords that end in a question. Examedit details, add keywords, add search description, keywords, keyword phrases, search engines, google search engine, page titles, keyword content, search engine strategies, please: What is embalming? How do I plan my funeral? Some other questions to think about when developing keywords: What is important to you? How do you differentiate yourself from other companies? What are some of the unique services you offer?

Useful Tips

- Include keywords in phrases.
- Use keywords in a question.
- Include keywords in the page title, page description, and text on a page. If this is not done, your website will not rank as high.
- Include keywords 5-7 times in the page content.
- Include commonly misspelled words associated with the funeral home name, staff, products and services. This will help online users who misspell their search words to find your site.

Page Titles

Each web page should have a unique page title that includes keywords and your location. Example: What is the cost of funerals in Kingston?

Useful Tips

- Make sure each page has a different title. If the same title is used, Google will only recognize one of the pages.
- Do not start your page titles with your funeral home name.
- Include your keywords.
- Avoid special characters (commas, periods, & symbols, etc.).
- Do not use the word "and" in your sentence.

Page Descriptions

Summarize the content of the page in a sentence or brief paragraph. Example: What is the cost of funerals in Kingston?

Useful Tips

- Use keywords in descriptions but do not over-use.
- Try to make descriptions unique.

- Try to make descriptions sound natural.
- Write concise sentences.

Content

It is important to maintain the content on your website to ensure it is current and refreshed on a regular basis. Include keywords in the content. Also, adding social media links within page tiles also helps search engines find your web pages.

Useful Tips

- Update the content on a regular basis.
- Use keywords in the content 5-7 times.
- Utilize YouTube and create videos using unique titles.
- Start blogging.
- Setup a Facebook account and live stream events.

[<< Search Engine Optimization \(SEO\)](#)

[Google AdWords >>](#)

Google AdWords

More information about Google AdWords as well as Google support contacts can be found at www.google.ca/adwords and www.google.com/adwords.

The key to Search Engine Optimization is creating a list of keywords that your community and potential families will type into the search engines to locate your firm. These few steps will generate the keywords that are most relevant to your community.

1. Sign In using your Gmail Information
2. Click Tools > Keyword Planner
3. Choose – Search for New Keyword and Ad Group Ideas
4. Several options will display within the dropdown. In the first box – choose Enter One Or More Of the Following and then enter the keywords you want to research. Separate each keyword and/or keyword phrase with a comma.
5. Skip Your Landing Page and Your Product Category
6. Click on Targeting (below Your Product Category). Enter any of the areas you would like to search.
7. Move down and click the Get Ideas button.
8. On the next screen you will see two tabs at the top: Ad Group Ideas and Keyword Ideas. You can look through both but Keyword Ideas provides a very clear picture on the search volume and competition for each keyword.
9. Within Keyword Ideas, you will see two sections: Search Terms and Keywords (by relevance). Search Terms is for all the keywords you have entered and the sections; Keywords (by relevance) lists all the suggested keywords related to your keyword ideas.

✿ When choosing keywords, try to find keywords that have both search volume and low competition. Choosing words with high competition will make it much harder for you to rank higher. Also, these results are done monthly so you may see fluctuations in results from month-to-month depending on how people are searching in your area.

[<< FrontRunner Website Settings](#)

[Google Analytics >>](#)

Google Analytics

All of your Search Engine Optimization (SEO) efforts need to be analyzed and the best tool to do so is Google Analytics. You can easily access an overview of website visits and page views to determine what areas of your website are frequented by online visitors and how they got there.

Google Analytics

FrontRunner Professional will set up your Google Analytics account. When complete, a verification email will be sent to your email address. Click the link within the email to verify the information and let your [Success Coach](#) know when that has been completed. He or she will then finalize the setup and send an email with the login information.

[Click here](#) to learn more about your Google Analytics account and how to use it.

[<< Google AdWords](#)

[Google Places >>](#)


Google Places


Claim Your Business

Google Places is a feature to help get your website noticed online. Your business stands out when it's listed at the top of the Google search engine results page. By claiming your business through Google, you can improve your search engine rankings and provide online visitors with instant access to your company's contact information and a description of the services within your business category.

As shown below, when Le Chien Noir is searched in Google, a great deal of information becomes instantly available to online visitors.

Le Chien Noir[Directions](#)





At a glance: steak frites · duck confit · rack of lamb · creme brulee · cheese curds

Hours: Sun-Sat 11:30am-10pm

Transit: [Princess Street at King Street East \(South side of Princess Street\)](#)

More reviews

[tripadvisor.fr](#) (38)
[tripadvisor.com](#) (38)
[restaurantica.com](#) (24)
[urbanspoon.com](#) (9)

[Navigate to the Google Places for Business website.](#)

Select the Get Started button and create a Google account if you don't already have one. When complete or if you already have an account, enter your current email address and password to sign in.

▼ Basic Information

Please note that changing your address or business name will require additional verification via mail or phone.

** Required Fields*

Country: *	Canada	▼
Company/Organization: *	FrontRunner Professional	
Street Address: *	4 Cataraqui Street	
	Suite #314	
City/Town: *	Kingston	
Province: *	Ontario	▼
Postal Code: * [?]	K7K 1Z7	
Main phone: *	866-748-3625	
	Example: (204) 234-5678 Add more phone numbers	
Email address:	info@frontrunnerpro.com	
	Example: myname@example.com	
Website:	www.frontrunnerpro.com	
	Example: http://www.example.com	
	<input type="checkbox"/> I don't have a website.	
Description:	FrontRunner Professional has been serving the funeral industry for 16 years. We offer content management, websites, and online memorial	
	200 characters max, 55 characters left.	
Category: *	Software Company	
	Which categories (up to 5) best describe your business? Ex: Dentist, Wedding Photographer, Thai Restaurant	
Category:		<input type="text"/>
	Add another category	<input type="button" value="X"/>

- Use the dropdown to select your country.
- Enter your phone number.
- Select Find Business Information.

- Enter your funeral home name and address information.
- Enter your phone number and email address.
- Enter the URL for your funeral home's website.
- Enter a description about your company. Ex: Brown Funeral Home has been serving the Albany community for 100 years. We are family-owned. We offer cremation, etc....
- Enter a category that best suits your funeral home. You can include more than one. Ex: Cremation, Pre-Arrange, Traditional Funerals
- Enter whether families go to your funeral home or you go to their own home.
- Enter your hours of operation (optional).
- Enter the payment methods you offer (optional).
- Upload an image of your funeral home (Choose File and select Add Photo).
- Add Video if you have any videos you wish to upload.
- Enter any additional information about your funeral home. Ex: Parking available
- When complete, Submit.

The preview page is what online visitors will see when they search for your funeral home or funeral homes in your community.



Note: Your Google Places profile won't be immediately visible. It can take anywhere from a few hours to a few days.

You will also need to validate your listing. Google Places will outline the available options.

Click the Finish button.

[<< Google Analytics](#)

[Google+ >>](#)

Google+

[Click here](#) to learn more about Google+.

[<< Google Places](#)

[Domain & Sub-Domain Strategies >>](#)

Domain & Sub-Domain Strategies

An easy and effective domain strategy incorporates search words into the URL. Don't use domain names that are similar to the name and brand of your competitors.

You may also wish to register a domain name that includes the name of your city. Example:
brownfuneralhomekingston.com. This will be indexed first overall by search engines because it matches the keywords of the domain name. Use the same strategy with sub-domains. Example:
kingston.brownfuneralhome.com

[<< Google+](#)

[Search Engine Strategies >>](#)

Search Engine Strategies

Once your website is live, the goal is for online visitors to actually find it. The first step is submitting the URL (www.yourfuneralhome.com) to search engines. [Start off with Google](#).



Include your URL on **ALL** printed materials including the obituary notices in local newspapers.

FrontRunner Professional has created a number of [additional tools](#) to help with your Search Engine Strategy:

- Home page with keywords built in.
- Listing the communities that you serve.
- Listing additional keywords into your profile.
- Fields to enter keywords on ALL pages of your website.
- Additional consultation services available.

[Home page add-ons](#) ensure your home page is dynamic with ever-changing information.

[<< Domain & Sub-Domain Strategies](#)

[Search Engine Submission Options >>](#)

Search Engine Submission Options

There are free and pay service submission options available to help enhance your SEO.

Free Submissions

Complete manual submissions by visiting each search engine and completing the online forms. This will send a 'spider' to your site for indexing. Expect to wait 4-6 weeks before free manual submissions show results.

Pay Service Submissions

For faster and better results, the various companies offer a pay service to have your site placed on their search engines. They will 'spider' your site within 7-10 days.

[<< Search Engine Strategies](#)

[Social Media Tips >>](#)

Social Media Tips

Learn about social media and the importance of having this for your business.

Here is a video to help understand social media and how it affect's today's society:



* For more information on social media, please [contact your FrontRunner Success Coach](#). We have also partnered with a company, [Disrupt Media](#) to help you with setting up social media.

Once you have the Social Media Website app, [contact your Success Coach](#) to provide the URLs for each social media site to link from your website. If you have a newer design, you have the ability to add these yourself. Click [here](#) to learn how.

Icons similar to the ones below will be added to your home page.

The popularity of social media continues to grow and it's strongly recommended that your funeral firm engage in this online world whenever possible. As you continue to build your online presence using these tools, your firm's profile will attract your community.



Find Your URLs

- Facebook: Login to your Facebook Account. Copy and paste the URL from the address bar in an email to your Success Coach.
- LinkedIn: Login to your LinkedIn Account. Select Profile from the top Menu Bar. From the Public Profile at the bottom of the profile box, copy and paste the URL in an email to your Success Coach.
- Twitter: Login to your Twitter Account. Navigate to the main profile page. Copy and paste the URL from the address bar in an email to your Success Coach.
- YouTube: Login to your YouTube Account. Navigate to the account home page; copy and paste the URL from the address bar in an email to your Success Coach.
- RSS Feed: No information is required. Each user will subscribe for their own RSS Feed.

If you do not have a **Facebook** account for your business and would like one, [click here to get started](#).

[<< Search Engine Submission Options](#)

[Increase Your Revenues >>](#)

Increase Your Revenues

The following features are automatically incorporated in the Book of Memories and your website. Follow the links to learn more about each revenue generator and how to effectively use them. If you require additional information, don't hesitate to [contact your Success Coach](#).

- [Heartfelt Sympathies](#)
- [Loyalty Rewards Program](#)
- [Memorial Candles](#)
- [E-Commerce](#)
- [Staples](#)
- [Sympathy Cards](#)
- [ConsumerSide](#)

[<< Social Media Tips](#)

[Heartfelt Sympathies >>](#)

Heartfelt Sympathies

Heartfelt Sympathies offers respectful memorial options for families that demonstrate the love and support of family members and friends when they are needed most. This secure, online portal to personalized products allows visitors to order flowers, memorial cards, and send sympathy baskets.

FrontRunner develops solutions that provide a higher standard of service for our clients and more importantly, to the families and communities they serve. The Heartfelt Sympathies program is designed to be disconnected from the aggressive, overly commercialized approach of a typical “Sympathy Store”, which routinely offends the public and ultimately serves to lose business for funeral homes. Heartfelt Sympathies protects the reputation of funeral firms by providing dignified and respectful options that families deserve.

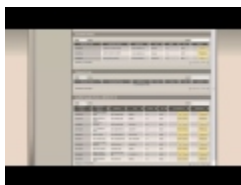
The Heartfelt Sympathies program works in tandem with the Book of Memories®. Not only do firms receive the highest commissions available, but a portion of the generated funds helps subsidize the Book of Memories to ensure the memorial websites remain in perpetuity. Providing the Book of Memories to your families and communities without cost to them or your firm generates a loyalty that is priceless.

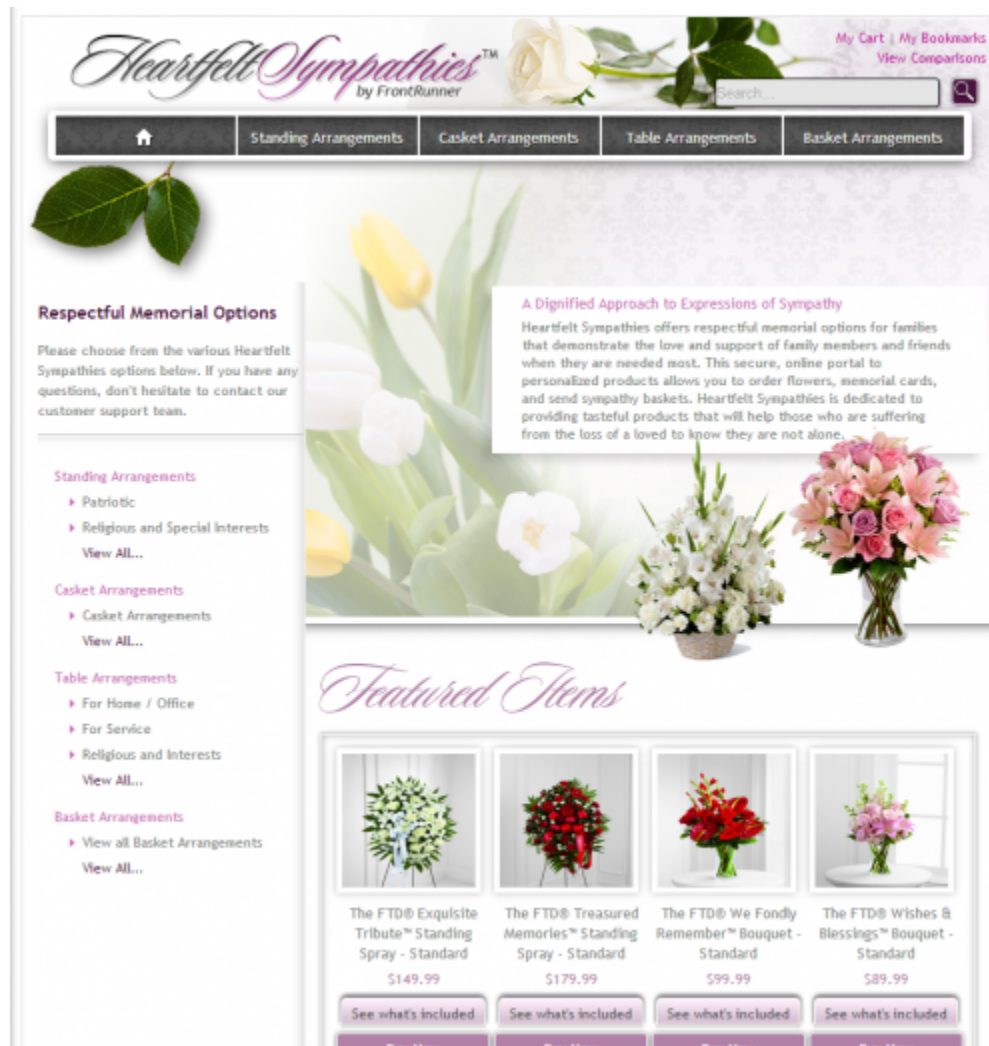
The Heartfelt Sympathies store also stand outs from other programs by capturing flower orders and permanently highlighting them, along with the sender’s words of support to the family, within the Book of Memories. As well, it instantly creates a Sympathy Card that features the flower order sent to the family. This creates the ultimate tribute and encourages visitors to select this over any other flower fulfilment option.

Heartfelt Sympathies is just one more example of how FrontRunner makes the ordinary extraordinary and why so many leading funeral homes choose FrontRunner over any other technology company.

Setting Up Heartfelt Sympathies

To set up Heartfelt Sympathies in the Book of Memories, navigate to System Settings > System Profile > [BOM Flower Settings](#).





For more information about your Heartfelt Sympathies account, please refer to the [Flower Log](#) from your Main > SimplyOne page.

[<< Increase Your Revenues](#)

[Loyalty Rewards Program >>](#)

Loyalty Rewards Program

FrontRunner has introduced a Loyalty Rewards Program. Every dollar you spend with FrontRunner will give you 2% back in points.

Here is a video that explains the program in more detail:



If you would like to take advantage of this program, please [contact your Success Coach](#).

Memorial Candles

Online remembrance candles provide a unique way for visitors to express their sympathies while supporting the Book of Memories in perpetuity.

For more information about your Memorial Candle account, please refer to the [Candle Log](#) from your Main > SimplyOne page.

For more information about how to help online visitors light a virtual candle, refer to the [Book of Memories Features](#).

About the Memorial Candle Program

The Book of Memories® program is unlike anything on the market. The highly robust memorial websites are designed to provide interactivity for generations and foster family loyalty to the funeral homes providing it. This is not an online guestbook designed to simply capture condolences for the few days before and following the funeral.

The Book of Memories program is the main reason why funeral homes choose FrontRunner and why countless firms are serving new families who have specifically chosen them for this offering. These firms are the recipients of millions of testimonials and words of appreciation for this high-quality service.

While a number of technology companies charge up to \$250 to create an inferior version of a memorial website, true to the nature and philosophy of FrontRunner's founder, we wanted to provide higher standards to families without cost to them or to the funeral home. To achieve this, FrontRunner created the Memorial Candle Program. It is designed to help financially support and offset the ongoing costs associated with hosting, storing, maintaining and enhancing the memorial websites. The program is completely voluntary to the online visitor; it simply offers them a gesture to show their support to the family.

We respect that some records have no visitors while others have many. The Memorial Candle Program operates with a community-based approach whereby any funds received are pooled to ensure that records with no candles are all still supported in perpetuity. All we have asked in return is that funeral homes support the program by publishing at least 80% of their services through their websites.

In the initial stages of the program, FrontRunner provided a small percentage back to funeral homes to be used as credits for additional services and ensure a solid online presence. However, we have always

reserved the right to adjust this percentage up or down depending on how well the program is supported and whether proceeds are keeping up with expenses.

Today, because of the popularity and functionality of the Book of Memories, a large percentage of these individual memorial websites actually exceed the size of some of our individual funeral home websites. More and more families are publishing years of photos and using the extensive back-end family login features.

Even 100% of the candle proceeds could not support all of the program's ongoing costs today and unfortunately, many funeral homes have missed the real point and only see this as a profit opportunity. For those who are looking to increase profits, we kindly ask that you respect the intent of the Memorial Candle Program to support the Book of Memories Program. Further, consider adding a \$40-\$60 charge to your own GPL for "Digital Media Services". Many clients could generate significant profits with this approach by helping families understand the value of their time to create the memorial website and online obituary posting.

While many funeral firms are only searching for the cheapest websites, all of us at FrontRunner sleep well knowing our clients' families and communities are being well served through our clients' care, compassion and desire to truly provide a higher standard.

[<< Loyalty Rewards Program](#)

[FAQs on Memorial Candles for the Funeral Home >>](#)

FAQs on Memorial Candles for the Funeral Home

Below are a list of common questions regarding memorial candles. If you are still unable to find a solution to any problem that you are experiencing, please contact support@frontrunnerpro.com.

Question: Is the family notified about all purchased memorials?

Answer: The funeral home determines whether or not the family will be notified of any updates within their loved one's Book of Memories. Depending on the type of record, [Basic](#) or [Standard](#), will depend on where the Family Login section is found.

Question: A client has lit a candle by check but does not know where to send it to.

Answer: Checks can be mailed to:
FrontRunner Professional
6A Clarence Street
Kingston, Ontario
K7L 5H8

[<< Memorial Candles](#)

[FAQs on Memorial Candles for the Purchaser >>](#)

FAQs on Memorial Candles for the Purchaser

Question: Are the candles real or simply virtual (online) images of support and tribute?

Answer: The Memorial Candles are online representations of love and tribute only. No physical candle will be lit in memory of a loved one.

Question: How do I correct my spelling error after purchasing a candle?

Answer: Please contact the funeral home to make the correction for you.

Question: Why can't I see several words in my memorial candle message?

Answer: This is most likely due to your screen resolution. The minimum system requirement is 1024 × 768 pixels. To change your monitor's resolution, visit the following [website that provides step by step instructions](#).

Question: Who can I contact to discuss my Memorial Candle purchase?

Answer: If there is an error with your Memorial Candle message, please contact the funeral home to make changes. If there is a technical error, email info@memorialcandlesupport.com. If this is regarding a charge on your statement, please contact your credit card company.

Question: How can I resolve an issue with a candle purchase? I was charged four times even though I received three rejection notices. My credit card company says all went through.

Answer: InternetSecure, the credit card processing company that manages the online credit card transactions, declined your transactions. Even though your credit card company may have approved, the transaction must still be approved by both companies. Your credit card will show the transactions, however the additional ones will be refunded and shown on your statement within 72 hours.



FrontRunner Professional DOES NOT process any credit card transactions. NO funds are deposited to our accounts unless approved by both the credit card company and InternetSecure.

Question: Why won't my candle purchase go through when my credit card company says that my card is fine?

Answer: Please make sure that all information you enter is exactly the same information associated with your credit card account. The name, address and phone number must be the same as what's on record with your credit card company.

If your credit card is a VISA and you have entered the information correctly, your card may be refused because it is not set up as being Verified by VISA. Please discuss this security feature directly with VISA rather than your bank.

Question: What should I do if I don't have an email address but would like to purchase a Memorial Candle?

Answer: You can purchase a Memorial Candle without a valid email address, however your receipt will be emailed to the address entered. You could enter an email address of a friend or family member who would be willing to print off a hard copy of the receipt for you.



All information entered to purchase a Memorial Candle is NOT distributed or used to send mass online solicitations. At FrontRunner Professional, we have the highest level of online security in place to keep your information safe.

Question: How can I change my candle purchase from one duration/fee to another?

Answer: In order to modify your Memorial Candle, please email info@memorialcandlesupport.com and include the following information:

- Funeral Home Name
- Deceased Name
- Date of Purchase
- Receipt Number
- The EXACT Name on credit card used for purchase
- Your Email Address

Once the information is received, your order will be changed and confirmed within 2 business days. Your refund may take up to 72 hours to show on your credit card statement.

Question: When will my candle message be visible? I ordered one but I'm not certain if it was processed.

Answer: The message will appear as soon as the transaction is processed / once your payment receipt is issued. If you do not receive a receipt, the transaction was not processed.

Question: Why is my message not appearing on the candle?

Answer: You may need to clear your internet history / cache in your web browser. Press F5 key on your keyboard but if that doesn't work, you will need to delete your history. The cache is where your browser files are stored so you don't have to download file every time you need them. When we update files, caches need to be cleaned because the cached data is out of date. Different versions will have different steps. [Try this link](#) – choose your web browser and version to access the appropriate steps for your computer.

Question: What do I do if my candle is not showing up even though I have received a payment receipt?

Answer: Please email info@memorialcandlesupport.com the following information:

- Funeral Home Name
- Deceased Name
- Date of Purchase
- Receipt Number
- The EXACT Name on credit card used for purchase
- Your Email Address

After we have received this information, your Memorial Candle will be changed and confirmed within 2 business days. Your refund may take up to 72 hours to show on your credit card statement.

Question: Will my credit card information be given/sold to any third party companies for promotional purposes such as advertisements, contact lists, etc?

Answer: FrontRunner Professional does not gather or store any credit card information. The online page where you enter your personal information is located on a secure site managed by Internet Secure, a Verisign registered company. It has the highest standards of security and privacy on the internet. All of the information gathered is highly encrypted and is not stored, sold or divulged in any way other than to approve the transaction with your credit card company.

Question: Why does my credit card continue to be declined?

Answer: There are many reasons why a credit card transaction may not be approved. The most common reasons are: incorrect card number; incorrect password; incorrect expiry date, the address does not match

credit card statements; the card is blocked for e-commerce use; and the cardholder has exceeded or is close to the credit card limit. Please contact your credit card company for more information.

Question: How do I go back to add a condolence message?

Answer: If you have not cleared your computer's cache or disabled the cookies, you should be able to open up the condolences page to make any changes. If you do not see this option, please contact the funeral home to help make the change.

Question: Am I only able to make one purchase per day with my credit card?

Answer: You are able to make five transactions on the same card in a 24-hour period.

Question: Is the family notified about all purchased memorials?

Answer: The funeral home determines with the family the preferred method (if any) of notifications.

Question: Are there hidden fees? I received an email that confirmed the price of a memorial candle but my credit card statement showed the cost was different.

Answer: No, there are no hidden fees. FrontRunner Professional receives only the purchase price of the candle selected. Any additional fees are generated by credit card companies or financial institutions.

Question: Why was my credit card charged multiple times but the payment receipt shows declined transactions?

Answer: Internet Secure is attempting to approve your purchase but your credit card company is declining the transaction. This is usually caused by incorrect information submitted during the purchasing process. Please ensure that your address information is exactly the same as what appears on your statement.

Your credit card account will display a credit of any failed transactions within a couple of business days.

Question: I'm trying to access information about funeral services but the website says I don't have the correct monitor resolution. What should I do to make sure I can see everything?

Answer: The Book of Memories requires a minimum screen resolution of 1024 × 768 pixels. You should still be able to view the Book of Memories using a lower resolution but the page will not display the way it was designed. To change your monitor's resolution, visit the following [website that provides step by step instructions](#).

Question: I have lit a candle by check but don't see where to send the check to. What address should it be sent to?

Answer: Checks can be mailed to:
FrontRunner Professional
6A Clarence Street
Kingston, Ontario
K7L 5H8

[<< FAQs on Memorial Candles for the Funeral Home](#)

[E-Commerce >>](#)

E-Commerce

The Product Catalog module allows you to quickly generate a product page with pricing, special pricing, and more. The header and footer use a WYSIWYG editor to further help create a professional layout that can be edited and updated in seconds. The additional e-commerce functionality will allow you to take online orders. (*Note a third party processor is necessary.



If you would like to add e-commerce to your website, please [contact your Success Coach](#) for more information.

Setting up E-Commerce

If you require a new page, refer to [Create a New Page](#).

Click 'Edit Content' to open the Product Catalog Control Panel.

- New – Add new products.
- Edit – Edit an existing product.
- Delete – Remove a product.
- Position – Change the product order on the page.
- edit settings – Edit the fonts used on the page.
- edit global shopping basket
- edit shopping basket header – Edit the top portion of the page.
- edit shopping basket footer – Edit the bottom portion of the page.



Add a Product

- **Product Status** – Designate whether products are visible or hidden (hide from online visitors but not deleted from catalog).
- **Sale Status** – Available for purchase, sold, or sold out
- **Product Number** – If applicable, as a reference for your online customers.
- **Product Name**
- **Manufacturer (optional)**
- **Our Price**
- **M.S.R.P. (Manufacturer's Suggested Retail Price)** – If there is none, leave the field blank.
- **Special Price (optional)**
- **Description for Special Price**
- **Surcharge (unit, or % of total)** – (ex. delivery charges or special handling fees)
- **Shopping Basket Mode** – Choose whether consumers can add the product to their Shopping Basket.
- **Shipping Methods** – Choose a shipping method and enter a dollar amount or percentage for shipping costs.
- **Layout in listing** – Pictures can either be positioned on the left or right of the page.
- **Position/Ranking in listing** – Defines the order of the products on the page. Position number 1 places the product at the top of the page. If position number blank, the module defaults to the order in which the products are added.
- **Description for short listing** – A summary of the product's features.
- **Picture for short listing** – Smaller pictures are visible when browsing the catalog but visitors can view larger images when they click on 'more info'.
- To insert a picture for the product summary, 'ADD PICTURE'. Follow the steps in the 'Image Gallery Interface'.
- **Caption under this picture (optional)**
- **More info view (creates a more info link)**
- **Layout in more info page** – Determine if the product will be displayed on left or right
- **Description for more info listing**
- **Picture for more info listing** – A larger picture can display when web visitor clicks on "more info".
- **Caption under this picture (optional).**

The screenshot shows the 'Product Editor' form with the following fields and values:

- Product Status:** Visible
- Sale Status:** Available for purchase
- Product Number:** 11588
- Product Name:** Bronze Urn
- Manufacturer:** Matthews Intl.
- Our Price:** 299.00
- M.S.R.P.:** 300.00
- Special Price:** 275.00
- Description for Special Price:** Sale!
- Surcharge (unit, or % of total):** 0
- Shopping Basket Mode:** Enable adding many to shopping basket
- Shipping Method 1:** 24 Hour, Cost \$25, Minimum: \$0
- Shipping Method 2:** 3-5 Day Ground, Cost \$10, Minimum: \$0
- Shipping Method 3:** 2-4 Week, Postal, Cost \$0, Minimum: \$0
- Layout in listing:** Picture on left, description on right
- Position/Ranking in listing:** 1
- Description for short listing:** Beautifully crafted bronze urn.
- Picture for short listing:** bronzurn.jpg
- Caption under this picture:**
- More info view (creates a more info link):** This product doesn't need a more info page
- Layout in more info page:** Picture on left, description on right
- Description for more info listing:**
- Picture for more info listing:** Brass_Product.jpg
- Caption under this picture:**
- Product Specific Tax:** Specify US tax below only
- Specific CDN Tax (PST):** \$ 0
- Specific CDN Tax (GST):** \$ 0
- Specific US Tax:** % 8

- Product Specific Tax – Select how to apply taxes to the product.
- Specific CDN Tax (PST) – Enter the dollar or percentage amount of the tax.
- Specific CDN Tax (GST) – Enter the dollar or percentage amount of the tax.
- Specific US Tax – Enter the dollar or percentage amount of the tax.

✿ Do not add the dollar sign (\$). The Product Catalog module does that for you.

Edit Global Shopping Basket

- Mode – By default, credit card is selected.
- Currency
- Merchant Provider – Select the payment processing firm. If you are unsure, please contact the company who provided you a login to your payment processing account.
- Merchant Account ID – This is provided by the merchant provider and contact either numbers or letters and numbers.
- Merch.Password / Trans. Key – This is provided by the merchant provider. You may be given a temporary password in which you will need to change to active your merchant account.
- Public Email Address – This email address will be the one provided to consumer once the transaction is complete.
- Shipping Email Addresses – When the transaction is completed, an email will be sent to the address(es) listed in this field. The email will contain all the information pertaining to the sale. (If multiple addresses, separate with a comma.)
- Fulfillment Confirmation Email Addresses – The shipping email address contains a link to click once the order is fulfilled. (If multiple addresses, separate with a comma.)
- Request PO Number during Order – Enable or disable the option
- Canadian Tax – Enable Canadian Taxes by Province
- US Tax – Enter the percentage of applicable sales tax.
- Shipping Methods
- Minimum shipping charge – Enter the minimum charge for the different shipping methods.

The screenshot shows the 'Edit Shopping Basket' form with the following fields and values:

- Mode: Credit Card / Account
- Currency: US
- Merchant Provider: Authorize.Net
- Merchant Account ID: [Empty]
- Merch.Password / Trans. Key: [Empty]
- Public Email Address: [Empty]
- Shipping Email Addresses: [Empty]
- Fulfillment Confirmation Email Addresses: [Empty]
- Request PO Number during Order: Disabled
- Canadian Tax: ☐ Enable Canadian Taxes by Province
- US Tax: 5 %
- Shipping Method 1: 24 Hour
- Shipping Method 2: 3-5 Day Ground
- Shipping Method 3: 2-4 Week, Postal
- Minimum shipping charge:
 - \$0 (24 Hour)
 - \$0 (3-5 Day Ground)
 - \$0 (2-4 Week, Postal)

Edit Settings

- Fonts for listing pages
- Fonts for more info pages (if applicable)

- Shopping Basket – Set to Allow Purchases so online visitors can process orders.
- Use Global Email Settings – Check the box to use the same email addresses set up within the Global Email Settings. To use different email addresses, leave the box unchecked and enter the email addresses.
- Public Email Address – This is the email address provided to the consumer after the transaction is completed to contact your firm about the sale.
- Shipping Email Addresses – When a consumer completes the transaction, an email will be sent to the address(es) listed in this field. The email will contain all the information pertaining to the sale. You can provide multiple email addresses, separated by a comma.
- Fulfillment Confirmation Email Addresses – The shipping email address contains a link to click once the order is fulfilled. (If multiple addresses, separate with a comma.)
- Surcharge for Product on Current Page (if applicable)
- Save

[<< FAQs on Memorial Candles for the Purchaser](#)

[Staples >>](#)

Staples

The cost of doing business has become even more affordable. The Staples Advantage program is now available to all funeral homes.

Join — for free — to save thousands of dollars a year on the items you buy every day. The more funeral homes that join, the deeper the discounts!

This new program has been customized to meet the needs of every funeral home, regardless of size, to ensure they can easily access office supplies and equipment at prices usually only available to large corporations.

The Staples Advantage is a true advantage for funeral professionals!



If you would like to take advantage of this program, please [contact your Success Coach](#).

[<< E-Commerce](#)

[Sympathy Cards >>](#)

Sympathy Cards

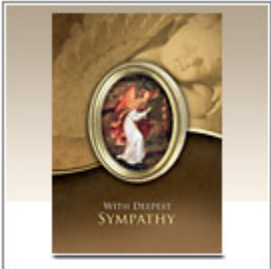
Online visitors can choose a Sympathy Card, personalize it, and have it sent directly to the family or funeral home for only \$5. All processing and shipping is managed by our partner Blue Bird.

Visitors choose a theme, a date to send the card, a return address, a signature, and a note.

Sympathy Card Information and Customization

- * Date to Send Card ☒ Please send card today ☐ Select the date
- * Would you like to add a return address to the envelope?
 ☐ Yes ☒ No
- * Would you like to add a signature to the inside of the card?
 ☐ Yes ☒ No
- * Would you like to add a Note to the inside of the card?
 ☐ Yes ☒ No

- The recipient information and quantity of cards is added.
- Add to Cart.
- Continue Shopping, Clear Cart, Edit Billing Info or Checkout:

Quantity	Preview	Product Details	Price Breakdown	
1		Angels Sympathy	Card Price:	\$5.00
Update		To: test	Quantity:	1
Delete		Card will be sent immediately	Total Cost:	\$5.00

Billing Information

No Billing Information Available

Card Total:	\$5.00
Postage:	\$0.00
SubTotal:	\$5.00
Tax:	\$0.00
Total:	\$5.00

[Edit Billing Info](#)[Clear Cart](#)[Continue Shopping](#)[Checkout](#)

Our partner Blue Bird Cards prepares and distributes all FrontRunnerProfessional Sympathy Cards. For inquiries regarding your order status or delivery information, please click [here](#).

After the billing information is entered and the payment has gone through our secure site, the information is sent to Blue Bird to prepare and distribute.

For inquiries regarding order status or delivery, [click here](#)

For more information about your Sympathy Cards account, please refer to the [Card Log](#) from your Main > SimplyOne page.

[<< Staples](#)[ConsumerSide >>](#)

ConsumerSide

In today's changing market, families are looking for more choices, more options, and more convenience when it comes to paying for funeral-related products and services. For many, using a line of credit is essential. Bluefin and FrontRunner Professional have put together a comprehensive all-in-one payment solution offering the most competitive rates on the market. ConsumerSide is designed with both the new consumer and the funeral home in mind, under a shared belief that "When you put families first, they'll take notice".

The integrated and eCommerce enabled product catalogue and virtual showroom provide convenience for your families and allow you to instantly take advantage of the vast new opportunities the online market has to offer.

Funeral Service Savings Plan

We are currently working with legislators and pre-need professionals to develop a new approach to setting aside funds for final expenses. This new product will help provide the flexibility and choice that new families are seeking.

It Costs Nothing to Get Started

It may be hard to believe, but there are no start-up fees! Sign up with ConsumerSide today to give families access to your complete virtual showroom and catalogue, and the payment flexibility they need. You will have the security you need. It's a win-win and costs nothing to enrol.

Contact your FrontRunner Professional [Success Coach](#) for more information. Feel free to contact Bluefin by visiting www.bluefin.com or calling 1-800-675-6573.

[<< Sympathy Cards](#)

[Increase Your Market Share >>](#)

Increase Your Market Share

Bringing Families to Your Door

Competition is fierce and the world of funeral service continues to evolve. In order to increase your market share, FrontRunner has developed complementary systems, market drivers, marketing tools, and system tools that will help attract interest in your community and bring more families to your door. For more information about any of the features below, don't hesitate to [contact your Success Coach](#).

- [Adding Cremation Services](#)
- [Adding Pet Loss Services](#)
- [Quote Builder](#)
- [Pre-Arrange Online](#)
- [BookOfMemories.com](#)
- [ObitsForLife.com](#)
- [Obituary Notifications](#)
- [Reminder Service](#)
- [Ad Library](#)
- [Webcasting](#)
- [Testimonials](#)
- [Quick Search](#)

[<< ConsumerSide](#)

[Adding Cremation Services >>](#)

Adding Cremation Services

If you are an existing FrontRunner Professional client and wish to offer your community ***A New World of Choice***, we invite you to join Simpler Times.

The network helps your firm provide your families with the tools they need to only choose the cremation services and merchandise they want. Also, when you become part of the growing cremation network, you can access the powerful marketing program and exclusive buying group benefits.

With the growing trend towards cremation, many funeral homes find themselves struggling with how to effectively serve the public's desire for simplicity from their traditional funeral facilities. Simpler Times fills that need perfectly. It provides consumers with the simplicity and convenience they seek and positions your firm as the one listening and responding to their changing needs.

For more information about Simpler Times and how to become a Provider, visit www.simplertimes.com or [contact your Success Coach](#).

[<< Increase Your Market Share](#)

[Adding Pet Loss Services >>](#)

Adding Pet Loss Services

An Unforgettable Friend™ is a network of caring funeral professionals and pet care specialists offering pet loss and bereavement services in their communities. The connection to network members provides families with invaluable grief and planning resources, pet loss services, and access to the finest in pet loss and remembrance products. AnUnforgettableFriend.com also features an online archive of pet tributes.

If you are currently involved in providing pet loss support for families in your community or considering adding pet bereavement support services to your current offerings, we invite you to join An Unforgettable Friend™. When you become part of the pet loss provider network, you get everything you need to provide compassionate bereavement services to your community.

For more information, visit www.anunforgettablefriend.com or [contact your Success Coach](#).

[<< Adding Cremation Services](#)

[Quote Builder >>](#)

Quote Builder

Arrange and Pre-Arrange Quote Builder – General Price List

The FrontRunner Quote Builder is an excellent tool to attract more families to your door. Online visitors appreciate the ability to build their funeral package with select services and merchandise, and determine the total cost of their selections in real time. Visitors have the ability to customize their arrangements and make an informed decision from the comfort of their own home. Once completed, the quote can be submitted directly to your funeral home, printed as a reference, and / or saved in the system to login at a future date to make changes. Visitors can also choose to prepay their final wishes online, securely and instantly.

✿ If you would like to have this added to your system, please [contact your Success Coach](#).

To begin, navigate to System Settings > Catalogs > Quote Builder GPL.

On the opening screen, there are two sections: General Price Lists and Taxes.

General Price Lists

Create New GPL

Show 10 entries

Name	Date Created	Last Updated	Actions
Steph GPL	2014-07-11 08:08:16 AM	2014-07-11 08:08:32 AM	Make Active Configure Copy GPL
Test	2014-07-09 14:02:01 PM	2014-07-09 14:02:01 PM	Make Active Configure Copy GPL

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

Taxes

Create New Tax

Show 10 entries

Name	Rate	Actions
GST	7.000%	Edit Delete
HST	13.000%	Edit Delete

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

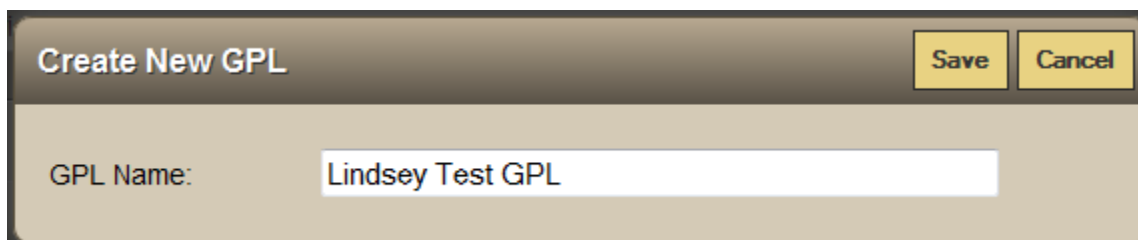
General Price Lists

All previous GPLs created are visible and accessible to Make Active, Configure (Edit), and Copy.

To find a particular GPL, adjust the Show Entries number from 10 to 25, 50 or 100. You can also use the Search function at top right or click on the Previous – Next buttons below the GPL listings.

Create New GPL

Click on the yellow Create New GPL button and within the pop-up window, type in the GPL Name. Save




Whenever you need to return to the main general price list menu, click on the Back to GPL List button at top left.

- To change the name of your GPL, click on the pencil icon to the right of the Name field and make changes. Save by clicking on the disc icon. (Click on the X if no changes are made.)
- To change the status of the GPL, click on the pencil icon to the right of the Status field and select Active, Inactive, or Archived from the dropdown menu. (Click on the X if no changes are made.)



Back to GPL List

Configure Lindsey Test GPL

Name: Lindsey Test GPL 

Status: Inactive 

Online Status: Offline

Add Products Configure Packages

Categories

Create New Category

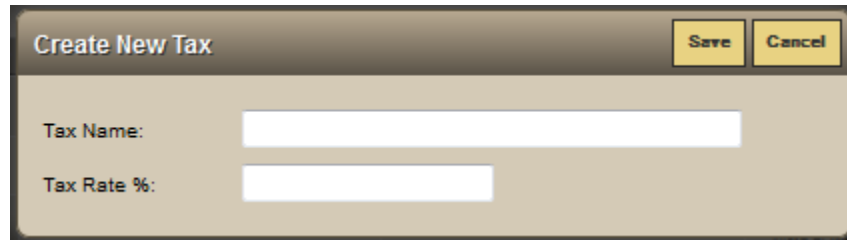
Show 10 entries Search:

Name	Sub-Categories	Actions
No data available in table		

Showing 0 to 0 of 0 entries First Previous Next Last

Create New Tax

Click on the yellow Create New Tax button. Fill in the Tax Name and Tax Rate %. Save. Each tax rate created can be applied to applicable product or package.

A screenshot of a 'Create New Tax' dialog box. The dialog has a title bar with the text 'Create New Tax' and two buttons, 'Save' and 'Cancel', on the right. The main area contains two labels: 'Tax Name:' followed by a text input field, and 'Tax Rate %:' followed by a text input field.

Create New Tax

Save Cancel

Tax Name:

Tax Rate %:

To find a particular tax, adjust the Show Entries number from 10 to 25, 50 or 100. You can also use the Search function at top right or click on the Previous – Next buttons below the tax listings. Click on the Edit button to change any tax description.

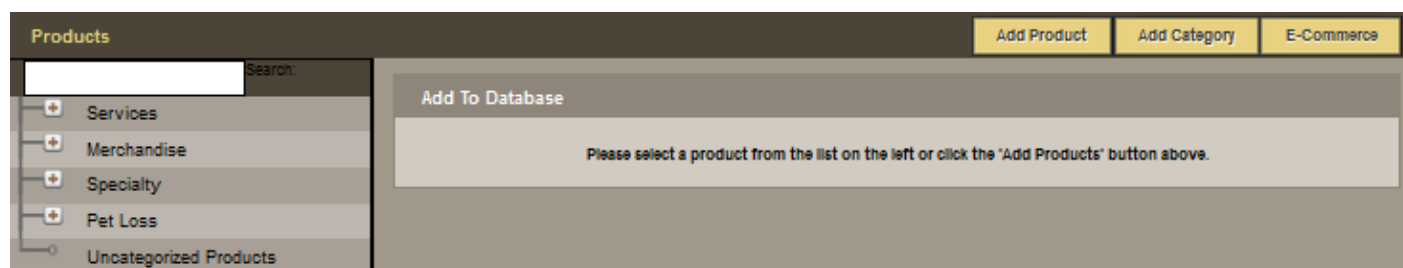
[<< Adding Pet Loss Services](#)

[Add Products >>](#)

Add Products

In order to build a quote, all products and services to be included need to be added to your FrontRunner system's Product Catalog. Any of the products that you added to your website or showrooms will be accessible as you build your quote packages but anything else must be added.

Navigate to System Settings > Catalogs > Products.



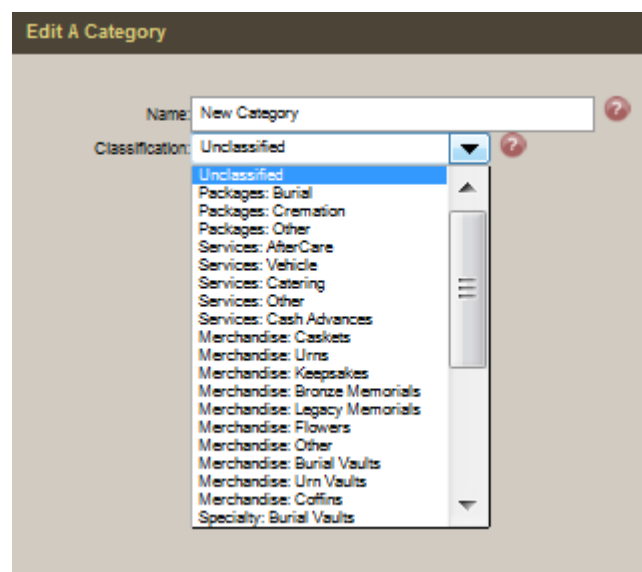
The various categories are listed under Products in the middle of the screen. To determine the current categories and products contained within the catalog, click on the + signs to expand the menus.

✿ Each product must be contained within a category.

If you require a new category, click on Add Category at the top right. Type in the name of the new category and the corresponding classification (sub category). Ex. To add a specialty casket selection, type in Specialty Casket and under Classification, choose Merchandise: Caskets. Save.

[<< Quote Builder](#)

[Configure GPL >>](#)



Configure GPL

Once a New GPL is created and products are added into the system, return to the Quote Builders page (System Settings > Catalogs > Quote Builder GPL) and choose the corresponding Configure option.

Name	Date Created	Last Updated	Actions
Lindsey Test GPL	2014-07-25 11:11:09 AM	2014-07-25 13:01:01 PM	Make Active Configure Copy GPL
Steph GPL	2014-07-11 08:08:16 AM	2014-07-25 13:01:05 PM	Make Active Configure Copy GPL
Test	2014-07-09 14:02:01 PM	2014-07-09 14:02:01 PM	Make Active Configure Copy GPL
test33	2014-07-25 13:01:01 PM	2014-07-25 13:01:01 PM	Make Active Configure Copy GPL

Showing 1 to 4 of 4 entries

First Previous 1 Next Last

Add Categories

Choose the Configure option for the General Price List that you would like to create/update.

Quote Builder GPL

[Back to GPL List](#)

Configure Professional Care & Services

Name: Professional Care & Services [Edit](#)

Categories

[Create New Sub-category](#)

Show 10 entries

Search:

Name	Number Items	Actions
Professional Care	1	Down Edit Add Products
Vehicles & Transportation	0	Up Edit Add Products Delete

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

Click on the Create New Category button. In the pop-up box, add a Category Name, Long Description (if applicable), and choose from the Available Taxes (or Create New Tax). Click on the taxes to apply to this category (highlight) and use the arrow buttons or Add All button to move the figures from the Available Taxes column to the Applied Taxes column. Click on Save.

The new Category will be listed. Click on the corresponding Configure button to add Sub-Categories. Then choose either Edit on the Sub-Category to Add or Delete Products.

Add Products

Add/Remove GPL Products

Available Products

GPL

Select a Classification:

Select a Class ▾

Select a Category:

▾

Select a Sub Category:

▾

Add Selected to GPL

Select All

Deselect All

Show

25 ▾

 entries

Search:

Product Code	Product Name	Retail Price	Description	Actions
No data available in table				

Showing 0 to 0 of 0 entries

First

Previous

Next

Last

From the **Available Products** tab:

- Select a Classification: Use the dropdown to choose a specific class (ex. merchandise, service, etc.)
- Select a Category: Once a classification is chosen, the corresponding categories will appear in the dropdown. Select a category.
- Select a Sub Category: Click on the dropdown to select a sub category related to the category chosen.

All products that have not yet been selected for this GPL will become visible and include the product code, product name, retail price, description and available actions.

Product Code	Product Name	Retail Price	Description	Actions
MT1001	Family Limousine	0	Limousine service to and from the service	<div>+</div> Add
MT1002	Hearse Transport	0	Transportation in our Cadillac Funeral Coach to church, graveside, or crematory	<div>+</div> Add

Select the green Add + button for each product to add to the GPL or click on the Select All yellow button above and then Add Selected to GPL.

From the **GPL** tab:

Every product that has been added to this particular GPL will be listed on this page. There are 2 options for each product:

- **Edit:** Click on this option for a pop-up to appear to change the category, name, descriptions, price, quantity available (if necessary), and whether this product is required. Save to GPL.
- **Remove:** This option removes the product from this GPL but not the product database.

Show only: **No Filter**

Show **25** entries

Search All Columns

Product Name	Retail Price	Description	Category	SubCategory	Actions
Cremation	0.00	If you or your loved one has chosen cremation, we have a variety of ceremonies to choose from.	Silver Package	Services	
Military Honors	0.00	An honor guard and U.S. flag service help show the family's respect for a loved one's service to our country. We can make all the arrangements.	Silver Package	Services	
Fireman Memorial	0.00	Fellow Firefighters honor one of their own with a moving farewell.	Silver Package	Services	
Candle Ceremony	0.00	Candle Lighting Ceremony Friends and family share the light of love in this simple, beautiful ceremony.	Silver Package	Services	
Blooming Hearts	0.00	Giving a keepsake at a funeral or memorial can help guests feel connected even through their loss.	Silver Package	Services	
Butterfly Release	0.00	These beautiful Monarch Butterflies can be touching and symbolic experience for funeral guests.	Silver Package	Services	
Footprints Service	0.00	The footprints poem can be a touching way to anchor a funeral or memorial.	Silver Package	Services	
Classical Harp	0.00	Performance at Chapel or Visitation	Silver Package	Services	
Professional Violin	0.00	Tranquil and poignant, our professional violin service soothes and uplifts.	Silver Package	Services	
Full Quartet	0.00	Our Full Quartet has a broad selection of music to suit your tastes.	Silver Package	Services	

Configure Packages

Packages

Create New Package

Show **10** entries

Search:

Name	Short Description	Price	Special Price	Number Items	Actions
Premium FRP Package	Here is a short description...	\$2,500.00	\$1,999.00	0	

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

There are several options:

- **Create New Package:** Add a name, descriptions, and price. Click on Save.
- **Edit an existing package:** Click on the Edit icon to change the name, description and price.
- **Add Products:** This page will display the products contained within the system that have not been included in this GPL. Each product can be edited and/or added to the package.

- Delete: By clicking on the red X, this will remove this package and all its content entirely.

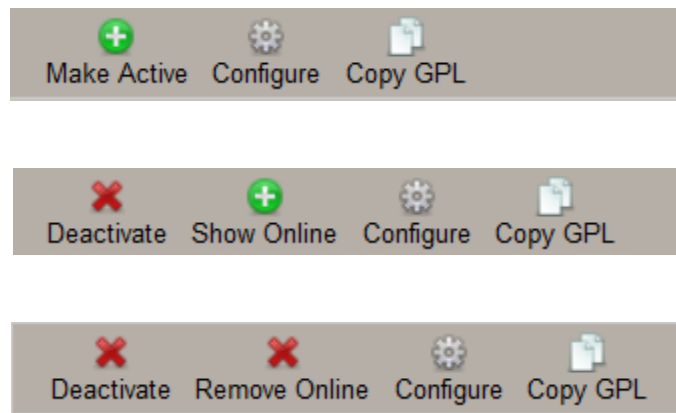
[<< Add Products](#)

[Activate Quote on Website >>](#)

Activate Quote on Website

Once a GPL is created to include all packages, products, and prices, it must be activated in order to be seen by online visitors.

Go to the General Price Lists page to locate the correct GPL. Click on the Make Active Button. This will create the new options to Deactivate or Show Online. Once the Show Online option is selected, the Deactivate and Remove Online are now visible.



Quote Builders

Once the above step is complete, go to Website – Edit – Quote Builders.

Builder Name:	<input type="text" value="Enter the name for the builder"/>
Builder URL:	<input type="text" value="Enter the URL for the builder (Letters only, no spaces)"/>
GPL:	<input type="text" value="Test"/>
Pre-arrange Form?	<input type="checkbox"/>
<input type="button" value="Create Builder"/>	


- Builder Name: Every GPL in the system should have its own distinct name. (ex. Smith Funeral Home Quote Builder)

- Builder URL: Each URL for every quote builder needs to be different.(ex. custom-quote-builder)
- GPL: Use the dropdown to apply a specific GPL to this quote builder.
- Pre-arrange Form: Check this to include additional fields within the quote builder for the user to fill out such as information related to their mother, father, spouse, etc.

Once complete, click on the yellow Create Builder button.

Smith Funeral Home Quote Builder	/quote/custom-quote-builder/type-service.php	Configure Copy Link Archive
----------------------------------	--	-----------------------------

Using the examples listed above, the name, url, and actions for this quote builder are visible within that table.

 Please Note: The URL that you create is contained within the URL that is automatically generated for this page. Using the example above, the Builder URL was entered as custom-quote-builder. In turn, it created this URL – /quote/custom-quote-builder/type-service.php.

The next step involves the configuration of the Quote Builder.



Name	URL	Actions
Cremation Society of Nevada- Affinity- Quote Builder	/quote/QuoteBuilder-CSNA/1/	Configure Copy Link Archive

Complete the Quote Builder by adding to and organizing the interface (appearance) of the quote as it will be presented to your online visitors.

- Mouse over the listed packages to delete (red X) or click on the blue arrow buttons to rearrange the order of the packages.
- Beside each section in the quote, you can edit the section name and description (click on pencil), move up or move down (arrow buttons), or delete (red X).

- To add additional packages or sections, click on the 'Add a Package' and/or 'Add a New Section' buttons.
- At the top left of the page, click on Edit Disclaimer to make any changes.

Merchandise & Services

Our funeral home offers a variety of packages to suit your needs and wishes. Click on any of the package buttons to see exactly what is included in each. Once a package is selected, click on the sections below for additional services and merchandise options. Your Total Estimate is visible at all times at the bottom of the screen. Once completed, click on Save.

+ Add a Package +

Please choose a package:



A la Carte
\$0

Immediate Burial with
Casket or Container
provided by Purchaser
\$2,400

Immediate Burial including
the Minimum Casket from
our Funeral Home
\$2,645

Immediate Burial with
other Casket selected from
our Funeral Home
\$1,150

Direct Cremation with No
Viewing/Ceremony -
Container provided by the
Purchaser
\$775

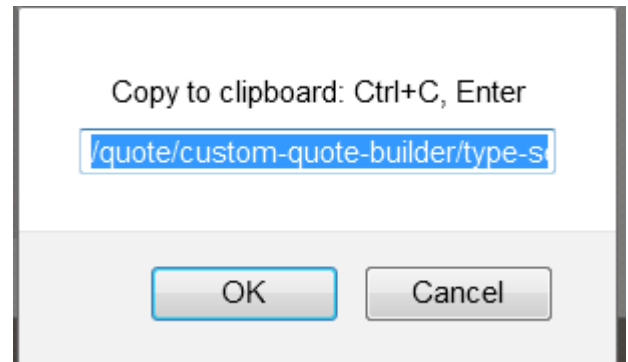
Once any changes have been made to any of the sections, click on Save, and then the 'Back to Builder List' button at the top left of the page.

Add Quote Builder to a Web Page

Click on the Copy Link button located under Actions for any Builder. When the pop-up appears, using your keyboard, press Ctrl C and then Enter.

Go to Website – Edit – Site – Quote Builder web page.

Once you're on the web page that will house the quote builder, click on Edit Details at the top right. There are then two steps to follow:



- Paste the URL in the field called – **What is the email address or external web page URL** – contained within the Optional Settings section.
- In the Page Action section, choose **Open an external web page**. (If you are switching from another page action (or module), please make sure that there is no content on existing page otherwise it will be erased. (If you require that content, copy and paste it into a Word document or another file.)

Once the above changes are made, click on Save at the top right. Once the site is published, the new quote builder will be visible to online visitors.

[<< Configure GPL](#)

[Submitted Quotes >>](#)

Submitted Quotes

When an online visitor submits a quote through the Quote Builder, a copy will be accessible for your funeral firm to access. Use the Search field to locate a particular quote.

Client Name	Creator	Builder Name	Sub-Total	Taxes	Quote Total	Actions
-------------	---------	--------------	-----------	-------	-------------	---------

- Client Name – The name of the person that the quote is intended.
- Creator – This field includes the name of the person who submitted the quote.
- Builder Name – The quote builder used to submit the quote.
- Sub-Total – The pre-tax total of quote.
- Taxes – All taxes that apply
- Quote Total
- Actions – Your firm can convert the quote to a record (pre-arrangement or current) and/or download a PDF version of the quote.

[<< Activate Quote on Website](#)

[Pre-Arrange Online >>](#)

Pre-Arrange Online

As more people do online research before ever visiting a business, it only makes sense that your funeral firm would provide all the information your community needs to make informed decisions. Further, if consumers feel comfortable with your firm and the information you've presented, there's a stronger possibility that they would be willing to take the additional step to pre-arrange online. This app allows an online visitor to fill out a pre-arrange form, which will then be automatically created as a pre-need record in your system.

The form is very straightforward for users who designate the arrangement details by entering basic personal information. They can also create a password to save the information and to login in the future to edit the information.

Click Next.

- Complete the birth information. All fields are mandatory.
- Complete the family information.
- Complete the education information.

Click Next (or Previous to go back).

- Choose one of the visitation options.
- Choose one of the reception options.
- Choose one of the service options.
- Choose burial or cremation.
- Choose the type of disposition.
- Choose whether there would be a committal (graveside) service.

Click Next (or Previous to go back).

- List any music selections included in the service.
- List any poems, religious texts, or readings to include in the service.
- List any interests or hobbies to include in the service.
- List any special themes to include in the service.
- List any specific food or beverages to include at the service.

Step 1 Step 2 Step 3 Step 4

User: Stephanie Montroy [Logout](#)

Who is this arrangement for?

☒ Myself * ☐ Family member or Friend *

Prearrangement Personal Information

First Name: *

Middle Name: *

Last Name: *

Gender: * Female

Phone Number: *

E-mail Address: *

Next

- List any special stories, personal notes or messages of hope to be read at the service.

Click Complete and Submit (or Previous to go back).



Your funeral home will be notified by email when an online visitor submits a pre-arrange form. If you have the Standard Record option available in your system, a pre-need record will automatically be created.

[<< Submitted Quotes](#)

[BookOfMemories.com >>](#)

BookOfMemories.com

BookOfMemories.com is a website where online visitors can learn more about Tribute Suite and the funeral homes that offer it. The website also displays any obituaries posted on those funeral homes' websites. The website is an effective way to promote the participating funeral homes and drive business back to their websites.

Locate a Funeral Home/Order Today

Online visitors can search by name, city, or province/state. For example, when New York is entered in the state field, a list of funeral homes in New York with Tribute Suite display.

<<

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Records:

1 to 10 of 138

Rows Per Page:

10

>

Name	City	State/Province	Country
Redden Funeral Home	New York City	New York	UNITED STATES
Paul Lane Funeral Home, Inc.	Jamaica	New York	UNITED STATES
Falvo Funeral Home	Rochester	New York	UNITED STATES
Falvo Funeral Home	Webster	New York	UNITED STATES
Lakeside Memorial Funeral Home, Inc.	Hamburg	New York	UNITED STATES
Carter Funeral Home	Syracuse	New York	UNITED STATES
Michaels Funeral Home	Middle Village	New York	UNITED STATES
Brown Funeral Home Inc.	Plattsburgh	New York	UNITED STATES
Perry Funeral Home, Inc.	Lynbrook	New York	UNITED STATES
DiPonzio Funeral Home, Inc.	ROCHESTER	New York	UNITED STATES

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Visitors can click through the pages or do another search to narrow down the results. The funeral homes' names link to contact information.

Search a Tribute

Online visitors can search by name, city, province/state, country, obituary, funeral home name, or date. For example, when the last name Brown is entered, a list of names ending in Brown display.

<< < 1 2 3 4 5 6 7 8 9 10 > >>			Records: 1 to 10 of 3076		Rows Per Page: 10 ▾	
Name	Funeral Home	Date Of Death	City	State/Province	Country	
Brown, Paul	Madison Chapel Funeral Home	Oct 14, 2012	Madison	Alabama	UNITED STATES	
Brown, Mary Harriett	Miller-Jones Mortuary, Hemet	Oct 11, 2012	Hemet	California	UNITED STATES	
Brown, Anita Little	Heritage Funeral Home	Oct 11, 2012	Griffin	Georgia	UNITED STATES	
Brown, Harold X.	Stevens Mortuary	Oct 10, 2012	Indianapolis	Indiana	UNITED STATES	
Brown, James Alan	James H. Cole Home for Funerals	Oct 09, 2012	Detroit	Michigan	UNITED STATES	
Brown, Neata Elizabeth	Brown Funeral Home	Oct 09, 2012	Martinsburg	West Virginia	UNITED STATES	
Brown, Thelma V.	Parsels Funeral Home	Oct 09, 2012	Absecon	New Jersey	UNITED STATES	
Brown, Leroy	Lemley Funeral Service	Oct 09, 2012	Atkins	Arkansas	UNITED STATES	
Brown, Barbara H.	Oak Grove Funeral Home & Cremation Center	Oct 08, 2012	Ludington	Michigan	UNITED STATES	
Brown, Gene Earl	The Major Funeral Home & Chapel	Oct 07, 2012	ARLINGTON	Texas	UNITED STATES	
<< < 1 2 3 4 5 6 7 8 9 10 > >>						

Visitors can click through the pages or do another search to narrow down the results. The names link to the date of birth and/or date of death and obituary. There is also a link back to the funeral home's website and the Book of Memories.

[<< Pre-Arrange Online](#)

[ObitsForLife.com >>](#)

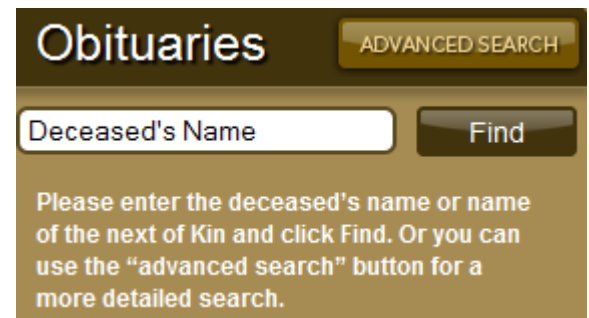
ObitsForLife.com

ObitsforLife.com is a commercial-free online obituary and death notice posting site controlled by funeral professionals to help protect the integrity of their profession, the dignity of the deceased, and the trust their families and communities have placed in them. We are helping funeral professionals regain control of their obituaries and death notices by directing visitors instantly back to the firm's website and preventing them from being redirected to special interest or third party marketers. Records never go down, providing a permanent connection back to the funeral home.

Once a record is published on a live website, it will automatically push to obitsforlife.com.

Online visitors to obitsforlife.com enter the name of the deceased in the search box and click 'Find'. Depending on the search, one name or a list of names will appear. If there is a long list of names, the online visitor can increase the number of visible rows or click through all the pages.

Once the correct deceased's name is found, it can be clicked to open a page that shows the full name, date of birth (if set to show), date of death, and obituary. The funeral home name links to the funeral home's website.



Any of the links within the Book of Memories section at the bottom of the page will link back to the funeral home's services web page. The name of the deceased will be visible and linked to the Book of Memories.

[<< BookOfMemories.com](#)

[Obituary Notifications >>](#)

Obituary Notifications

The Website Obit Notification app allows online visitors who are interested to receive funeral service notifications when new obituaries are posted. They can sign up by entering their email address and submitting.

✿ If you would like to activate in your website, [contact your FrontRunner Success Coach](#).







Those who sign up will receive emails once a day notifying them of any new obituaries added to your website. The emails also contain a link allowing them to unsubscribe from the emails at any time.


The emails contain the following information:

- Recent Services added to 'Funeral Home Name' website.
- This is an electronic notification that the following have passed on and resting at 'Funeral Home Name'. If you would like to pay your respects please click on our Book of Memories links provided below.
- John Doe – View Online Memorial
- This notification has been generated and sent to you as a result of you signing up for obit notifications at the Funeral Home Name website. If you are receiving this email in error, or would no longer like to receive obit notifications, please click here to unsubscribe.

[<< ObitsForLife.com](http://ObitsForLife.com)

[Reminder Service >>](#)

Current Services	Past Services
Veteran Memorial	Fallen Heroes
	Larson, Adam April 02, 2012
	Irvine, Matt April 01, 2012
	Clare, Josh March 29, 2012
	King, Chris March 22, 2012
	Barnes, Elizabeth March 19, 2012
	James, Kevin March 01, 2012



Enter your email below to have our funeral service notifications delivered to you

Email:

Notify Me

Reminder Service

The Reminder Service is a great tool for your funeral firm's staff and the clergy that officiates at funeral services to remain in contact with families who have entrusted you to care for their loved ones. You will be notified one week prior to the anniversary of death. This reminder will allow you to reach out to families at what will no doubt be a difficult time. This feature is a wonderful way to help demonstrate your caring commitment to your families.


Clergy

By default, the reminder service for clergy members is enabled.

The clergy member information is found within System Settings > Databases > Clergy Members.

Edit Clergy Member

Name :	Pastor Don Wright
E-mail :	rdonwright@gmail.com
Street Address:	1013 Cottman Ave
City:	PHILADELPHIA
Province/State:	Pennsylvania
Country:	United States
Postal/Zip Code:	19111-3658
Phone:	(215) 342-8203
Job Title:	Pastor
Clergy Approves Receiving Anniversary Notifications:	<input checked="" type="checkbox"/>
Disable Anniversary Notification:	<input type="checkbox"/>

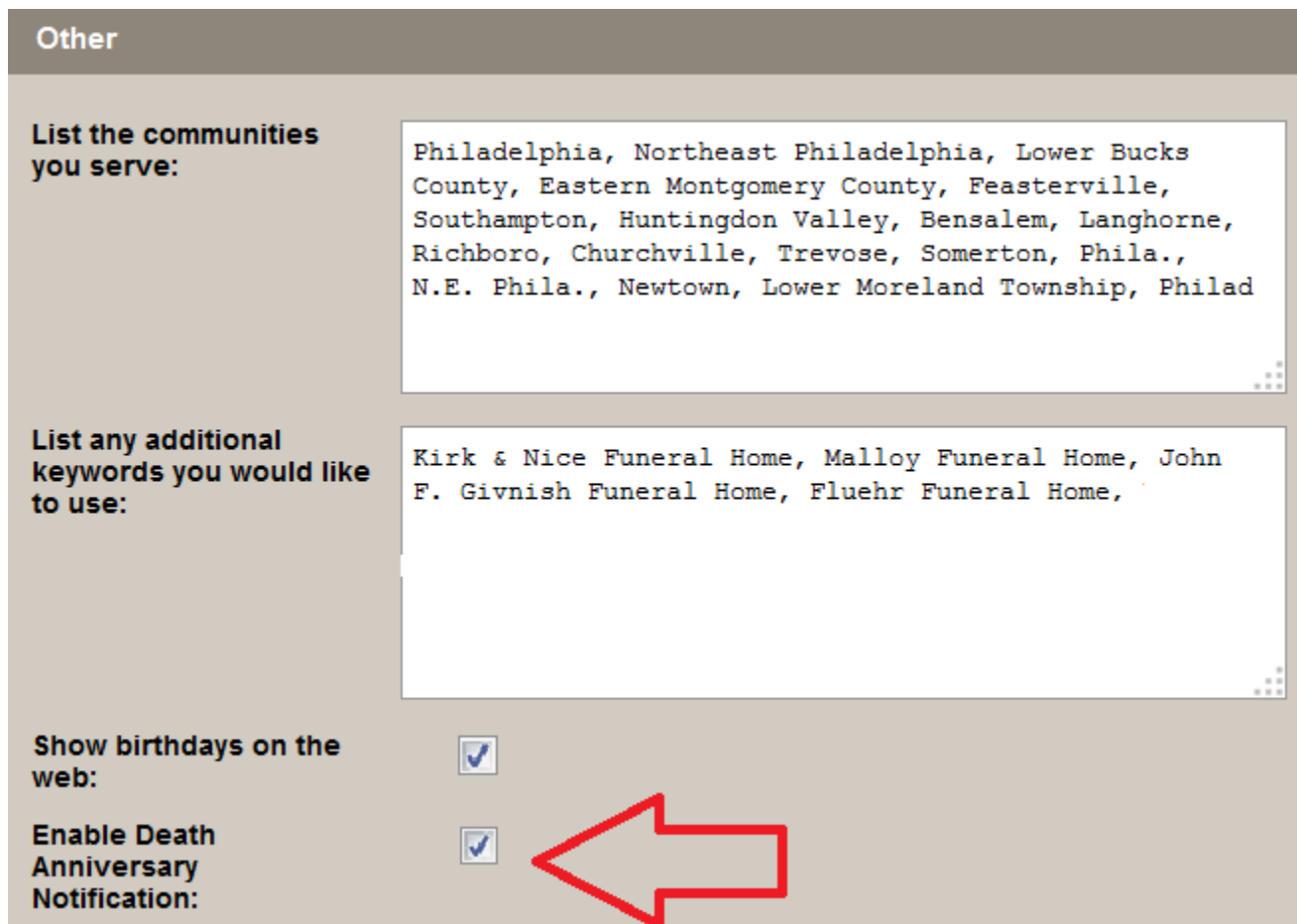


Click on a clergy member's name to edit, or click 'Add Clergy' to add a new member. If you wish to disable the anniversary notification, check the 'disable anniversary notification' box. Save.

Funeral Home

By default, the reminder service for the funeral home is enabled.

The funeral home profile is found within System Settings > System Profile > Profile.



Other


List the communities you serve:

Philadelphia, Northeast Philadelphia, Lower Bucks County, Eastern Montgomery County, Feasterville, Southampton, Huntingdon Valley, Bensalem, Langhorne, Richboro, Churchville, Trevose, Somerton, Phila., N.E. Phila., Newtown, Lower Moreland Township, Philad

List any additional keywords you would like to use:

Kirk & Nice Funeral Home, Malloy Funeral Home, John F. Givnish Funeral Home, Fluehr Funeral Home,

Show birthdays on the web: ☒

Enable Death Anniversary Notification: ☒ 

If you wish to disable the anniversary notification, scroll down to the 'Other' section and uncheck the 'enable death anniversary notification' box. Save.

Online Visitors

Anyone who leaves a message in their loved one's Book of Memories, and includes an email address, will be notified one week prior to the anniversary of death. If you wish to disable, open the record and navigate to Book of Memories > Theme. Check the box to 'disable anniversary notification for this record'.

Book of Memories Settings

☐ **Disable funeral home candle**

☐ **Disable Anniversary Notifications for this record**

Photo Approval System

Use Global Settings ▼

Story Approval System

Use Global Settings ▼

Use Free Candles for this record

☒

Set theme as default for:

Select record type ▼

* Note: This will affect NEW records only

Photo Frame Images

Use Global Settings ▼

Global Photo Frame Image Setting:

Use Global Settings

*** NOTE: Active Photo Only will show the Primary Photo if it exists, or the first photo (if photo approval is on, must be an approved photo), or a placeholder image.**

[<< Obituary Notifications](#)[Ad Library >>](#)

Ad Library

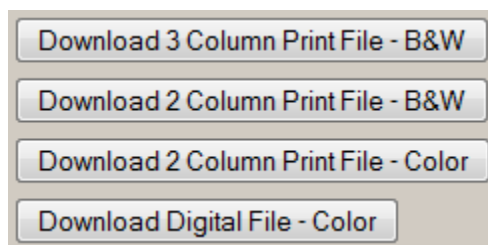
The Marketing Center provides essential tools to help grow your business. This app contains printable Book of Memories advertisements as well as website search results and statistics. The Marketing Center is an ever-evolving tool; you will have access to search data from your funeral home and those in your state/ province or country.



Marketing Center > Ad Library.

Select an ad from the menu. Select one of the Download buttons.

* Not all ads have every download option.



On the Adobe Acrobat Document pop-up, click on Open with, then click the OK button. (If you don't have Adobe Reader installed on your computer, [download it here.](#))

Once the ads download and open, there is room on the ad for your funeral home's logo.

- Use Photoshop to add the logo.
- Send the ad to your local print shop and have them add the logo.
- [Contact your FrontRunner Success Coach](#) to arrange for the logo to be added.

[<< Reminder Service](#)

[Webcasting >>](#)

Webcasting

Funeral Webcasting allows grieving family members and friends to be part of the service no matter where they live in the world. FrontRunner software includes integration capabilities for SympathyNet. When a webcasting event is created, both systems generate an invitation email with login information for families to send to those who are unable to attend the service.

* You must have an account with SympathyNet to access this feature. Contact Paul@SympathyNet. If you would like to activate in your system, [contact your FrontRunner Success Coach](#).

Setting up Your System

Navigate to System Settings > System Profile > Profile. Open the profile and scroll to the box (shown below) to enter the SympathyNet API Key, provided by SympathyNet.



Webcasting (Powered by SympathyNet)

SympathyNet API Key

Create a Webcast

Click 'Add Webcast' to activate the feature and edit the Webcast Settings.



Visitation

How Many Public Visitations:

Visitation Location: [Add](#)

Visitation Date & Time: - [Add Webcast](#)

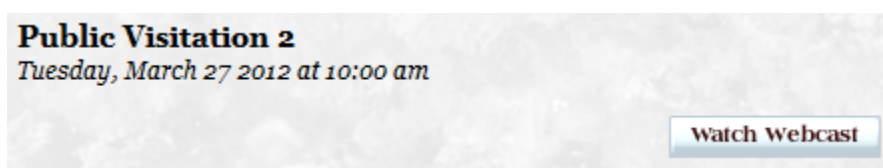
Year Month Day Start Time End Time

- Create a Secure Login (user name and password) for families by checking the appropriate box.
- Change the title of the webcast and add the description to appear under the viewing window in the Book of Memories.
- Edit the event date and time to change the times originally entered in the arrangement process.

To change the date or times of the event without modifying the arrangements, select 'Modify Webcast'. Edit a webcast by clicking on the 'Edit Webcast' button. In this section, the date and/or times of the event can be changed without modifying the arrangement dates and times.



To add to the list, click on the 'Add Event' button at the top right. Once the event is added, it will be available in the Book of Memories. The 'Watch Webcast' button will only be available once the webcast begins.



To view all scheduled webcasts, navigate to Main > Book of Memories > Webcasting. All webcasts for all clients are accessible.



If you are experiencing issues with your SympathyNet webcasts or have any questions, please contact Paul@SympathyNet.

[<< Ad Library](#)

[Testimonials >>](#)

Testimonials

What better way to demonstrate the excellence in service that your firm provides to the families in your community.

Once you have the Testimonials app, you have the ability to add these yourself. Navigate to your Website tab, which will take you to the home page. From the Testimonials section, click the Edit button.

Name	Testimonial	Date	Status	Branch	
Tina Henderson	"Dear Kevin, thank you so much for your guidance and patience through this difficult time. It is appreciated more than words can express." - Kindest Regards, Tina	2012-03-06 15:24:01	published	K.W Montroy Funeral Home	Action ▼
Michael Nelson	"Kevin, Thank you for the memorial cards in the memory of our dad. We sincerely appreciate you excellent service, care and concern at this difficult time." - Yours truly, Michael	2012-03-06 15:24:37	published	K.W Montroy Funeral Home	Action ▼
John Sinclair	Kevin - A sincere thank you for all your time, effort and compassionate during this time of sadness. It was a pleasure dealing with you and your team. Your professionalism and willingness will not be forgotten, many, many thanks"	2012-03-06 15:25:13	published	K.W Montroy Funeral Home	Action ▼

To add a new testimonial, click the 'New Testimonial' button. Enter the name and email address of the person who has written the testimonial. Copy and paste the message into the Testimonial box. Choose the status for this testimonial and the branch (if there are multiple branch locations). Save

Click on 'Action' to edit or delete a testimonial.

[<< Webcasting](#)

[Quick Search >>](#)

Quick Search

Quick Search Notifier

Whenever an online visitor uses the website's Quick Search function, an email notification is sent to your funeral home detailing what keywords were searched and the number of results found. This is very important while building the website to determine whether any information is missing.

When a visitor wishes to find certain information on the site, they enter keyword(s). A new page will display the search results based on the keyword(s) entered.

As an example, we created a search for "Death Notice". There were 29 results that included the title of the page and a brief description of the content on that page. The online visitor would click on a linked title to take them to that page.



How to enhance the search results:

When logged into the system, navigate to the Website tab and follow these steps for every page that is visible to the public. Click on 'Edit Details'.

Under Optional Settings:

- Search Keywords – Enter keywords and keyword phrases related to the content on this page. Separate each with a comma.

- Search Descriptions – Enter a detailed yet concise description about the content on this page.
- Save

Example:

Cloisonne Urns

Search Keywords – urns, cloisonne, copper, bronze, unbreakable, colors, enamel,

Search Descriptions – Learn about cloisonne urns and the steps to make one.

If you wish to change who receives these email notifications, navigate to System Settings > System Profile > Profile. Scroll down to the 'Address & Contact Information' section and refer to the 'email for QuickSearch Reports' field. If you are adding more than one email, separate each with a comma. Save.

[<< Testimonials](#)

[Funeral Screen Export >>](#)

Funeral Screen Export

The connection will push the following service information to your Signage Studio for any particular day of service:

- Decedents Name
- Primary Photo
- Service Type / Time
- Obituary
- Room Name
- Special Instructions

How to Export information to your Signage Studio

The export to Funeral Screen is found under the **Marketing Center > Funeral Screen Integration > Export Services**

The screenshot displays the FrontRunner Professional interface. At the top, a navigation bar includes tabs for DASHBOARD, MAIN, ARRANGEMENT, MANAGEMENT, WEBSITE, KIOSK, MARKETING CENTER (highlighted with a red box), SITE GOD, and SYSTEM SETTINGS. Below this, a left sidebar contains a 'Collapse Menu' icon and several menu items: Ad Library, Website Search Results, Funeral Screen Integration (highlighted with a red box), Export Services (highlighted with a red box), and Configuration. The main content area is titled 'Export Services' and features a sub-header 'Service Listings From 2015-02-01 To 2015-06-26'. Below this, it states 'The services and/or visitations scheduled for the above dates are listed below'. A prompt asks 'If you wish to pull services for a different date, please enter it below:' followed by 'Start:' and 'End:' date pickers, both showing '2015-02-01' and '2015-06-26' respectively. At the bottom of this section are two orange buttons: 'Load Services for Date Range' and 'Clear Exported Services'. A small 'Export to Funeral Screen' button is located in the top right corner of the main content area.

1. **Service Listing For:** Enter the date or the date range to pull up services you wish to push.
2. Services for the day/range will be showcased below. You may edit any of the data fields to adjust the content.



The decedents name, primary photo, service type and time and with obituary will pre-load for you.

3. **Room Name:** Enter in the screen name that is specific to the Signage Studio.

! The Room Name determines which screen the service information will be displayed on. Room Name is case sensitive and is specific to your Signage Studio account.


4. **Special Instructions:** Enter in any special instructions you wish to push over to the sign for a service.
5. **Hide This Service:** Should you not want to push a particular service for that day over to any screens, select Hide This Service on the right hand side of the service listing.
6. **Export to Funeral Screen:** When ready, select Export to Funeral Screen in the top right of the screen. This will update any screens you have with the data that been pushed over.

Export Services Export to Funeral Screen


Service Listings From 2015-02-01 To 2015-06-26
The services and/or visitations scheduled for the above dates are listed below
If you wish to pull services for a different date, please enter it below:

Start: 2015-02-01 End: 2015-06-26

Load Services for Date Range
Clear Exported Services

 Dora Jane Gee
Enter Room
Service begins at 10:30am
Enter Special Instructions
Theme: OL_Boatdock

Obituary, Favourite Quote, etc. Hide This Service

 Amber Edwards
Enter Room
Service begins at 10:00am
Enter Special Instructions
Theme: TN_Forest

Obituary, Favourite Quote, etc. Hide This Service

Honoring a Life

Honoring a Life is a global fight against climate change and a memorial tree program created to give those who are grieving the option of a deeply symbolic gesture to honor their loved one. As a funeral home, you can provide the honoring a life kit to your families you serve.

Honoring a Life Kits include:

- A Tree to be planted
- Online Memorial on www.honoringalife.org
- A Card to provide your family
- A Bookmark
- A Envelope
- All stationery items are printed on eco-friendly, recycled paper.



Note: To activate Honoring a Life and purchase kits [contact Honoring a Life here](#)

Once the program is activated in your system, you will be able to plant trees, and create memorials on the Honoring a Life website with seamless integration to your Funeral Solutions Group system, with no need to add duplicate information. As soon as the kits are purchased, we have shipping arranged to send the stationery pieces to your funeral home and we will add all the credits into your system.

To View Honoring a Life within your System

Navigate to the Main Tab > Honoring a Life.

Here you will see your Honoring a Life Dashboard

The screenshot displays the HAL Dashboard interface. On the left, the 'HAL Credits' section shows 172 credits available with a 'PURCHASE MORE KITS' button. Below this, the 'HAL Contribution' section congratulates the user for planting 4 trees. At the bottom left is an 'Online Chat' widget. The main 'HAL Records' section features a search bar, filters for 'All', 'Current', 'Past', and 'Trees Only', and a table of records. The table includes columns for Photo, Client Name, Client Number, Date Of Death, Tribute Status, and Actions. Five records are shown, with the first three having 'View Tribute' and 'Plant Tree' buttons, and the last two having only 'Plant Tree' buttons. A pagination bar at the bottom indicates 'Showing 1 to 5 of 5 entries' with 'Previous' and 'Next' links.

Photo	Client Name	Client Number	Date Of Death	Tribute Status	Actions
	Knight, Blake	897	2016-01-06	Tribute Status: 2 Tree(s) Planted	View Tribute Plant Tree
	Lawson, Cindy	967741	2016-01-07	Tribute Status: 1 Tree(s) Planted	View Tribute Plant Tree
	Mackey, Jeffrey	20160156	2016-01-07	Tribute Status: 1 Tree(s) Planted	View Tribute Plant Tree
	Jones, Ronald	20160155	2016-02-04	Tribute Status: Not Visible	Plant Tree
	Knight, Derrick	898	2016-02-15	Tribute Status: Not Visible	Plant Tree

HAL Credits

This section will allow you to see if the following:

- How many credits you have available (One credit equals one kit)
- By clicking the purchase more kits button, you will be able to pay via Simply One Account or by Credit Card. This will automatically process your order to have your kits sent to you.

HAL Contribution

View the accumulated amount of trees you have planted.

Online Chat

Chat with our support team for any questions you may have.

Honoring A Life Records

This section will populate all records you've added into your Funeral Solutions Group System. The different tabs will allow you to see current, past, all records or only records in which you've planted trees for. By clicking the Plant Tree button, this will take you to the client's record to add a personalized message before publishing on the Honoring A Life website.

Collapse Menu


- Client Arrangement
- Record Management
- Book of Memories
- Printing
- Print On Demand
- Print Engine
- Honoring a Life
- MemorialFX Video Tributes

Liscomb, Barbara

MANAGEMENT RECORD NOT-PUBLISHED TO WEB

Plant a Tree

Planting a Memorial Tree for: Barbara Liscomb



When you choose to have a memorial tree planted for your loved one, you are doing more than simply putting a plant in the ground. You are making a long-term commitment to the environment and implanting the memories of your loved one in our planet for countless years to come. A memorial tree is a unique tribute which provides global benefits like no other memorial gift could.

What you receive:

- A memorial tree planted in the area of greatest need, according to the planting schedule of the Canadian Institute of Forestry.
- A memorial card to be sent to your home, or a person of your choosing which demonstrates the gift you have given.
- Your name and message listed in this online memorial, and on the honoringalife.org website.

This Tree is from:*
KW Montroy Funeral Home

Leave a message for the family (Optional).
This message will be made public.

Price per tree: \$30.00

1 credit required.

Continue to Checkout

You currently have 0 credits available.

Spend Credit

Planting A Tree

Within the Plant a Tree Tab, you can preview the memorial page to see what it would look like prior to purchasing. The “This Tree is From” section will auto-populate with your Funeral Home’s name, which you can change if needed. The following message is published to the Honoring a Life website with each tree purchase: The planting of one memorial tree in the honor of *Deceased Name* has been arranged by *Funeral Home Name*. You have the ability to add an additional personalized message as well to the “Leave a message” box. Click the spend credit button to finalize your purchase. It will also show you the price per tree if you do not have enough credits to make the purchase. At this time you can send your card, bookmark and envelope to the family.

Editing a Memorial Tree Message

If someone has purchased the planting of a Memorial Tree and they contact you to edit the message that they have left with the tree, you are able to do this for them:

1. Login to your system and go to the record that the memorial tree message was left for.
2. Click on Tributes in the left menu, and then Edit Memorial Tree on the right, for the message you need to edit. This will take you to your Honoring a Life dashboard.

3. Click the green Edit button, and edit the message.
4. Click Save.

Saving the changes will automatically publish the updated message to your website, as well as the [Honoring a Life website](#).



This does not edit the card. Please [contact Honoring a Life](#) to update the card.



If you have any questions about the program, please [contact Honoring a Life](#).

FAQs

Question: Where can I see my tree at?

Answer: The tree will be planted in a forest, so being able to see the single tree that is yours is likely not possible right now. In the future, we will likely be looking into working with local cities to be able to plant in designated areas.

Question: Where is my tree planted at? Can you provide me with city and state?

Answer: Trees will be planted in the closest project to the recipient. It may not be in the same state, as the trees are planted in areas with the greatest need.

Question: When exactly will my tree get planted?

Answer: We are unable to provide an exact date of planting, as there are too many variables, for example, the weather. Generally, the biggest planting season is in the Spring/Fall, but if there is a lot of rain in the summer, they can plant at that time as well.

Question: How do I know my tree is planted and can I get an email the day of planting?

Answer: Once the tree is planted there will be a map added to the Memorial page on "honoringalife.org" to show what area the tree was planted in. This will likely not happen for some months after the planting, as it does take time for the reports to flow to us.

Question: How do I know which tree is mine?

Answer: There is not a tree designated to the buyer. When/if we move into Urban Planting then we will be able to let you know what tree is yours.

Question: Will there be a name or plaque or even a ribbon on my tree?

Answer: When/if we move into Urban Planting, we may be able to have a plaque but it is different for every town or city. This type of planting is a much more expensive option and would add more than \$200 onto the cost of each tree, depending on the by-laws.

Question: Can I buy a plaque to put by my tree?

Answer: No. When/if we move into Urban Planting, you may be able to have a plaque but the laws are different for every town/city.

Question: Do I get a choice of city/state where I can have my tree planted?

Answer: Yes, the buyer can contact [Honoring a Life](#) and we can try to get a tree planted in a specific state if there is a project there.

Question: Can I google the location of my tree?

Answer: Buyers are not given GPS co-ordinates for the tree. Only general areas will be given.

Question: What if my tree dies?

Answer: There will be no way of knowing if the tree dies.

Increase Your Aftercare Services

FrontRunner has the resources you need to demonstrate to your families how you care about them long after the funeral service is over. Our daily and weekly email programs are written by a certified grief counsellor who has developed both series to offer insights, support self-care, and build resiliency. The additional resources also demonstrate your commitment to help families at times when they need it most.

- [365 Days of Healing Email Program](#)
- [52 Weekly Tip Email Program](#)
- [Afterloss Subscription Program](#)
- [The Grief Center](#)
- [The Remembrance Process](#)

[<< Honoring a Life](#)

[365 Days of Healing Email Program >>](#)

365 Days of Healing Email Program

This year-long series of 365 daily email messages is designed to assist the bereaved in mourning with intention. Not simply an affirmation, each message offers insight into the nature and purpose of grief. Carefully chosen quotations from literature and suggested activities nurture self-awareness, support self-care, and build resiliency; while anthropological examination of cross-cultural bereavement practices widens our appreciation of the scope and variety of the human experience of grief.

✿ If you would like to have this added to your website, please [contact your Success Coach](#).

Your families will see the box, as shown below, where they can enter their name and email address.

A yellow rectangular sign-up form with rounded corners. At the top, it says "Daily Grief Support by Email" in a bold, dark font. Below this, a paragraph of text reads: "Grieving doesn't always end with the funeral: subscribe to our daily grief support email, designed to help you a little bit every day, by filling out the form below." There are two input fields: one labeled "Name" and another labeled "Email Address". At the bottom right of the form is a yellow button with the text "SignUp" in a dark font.

Once submitted, the person will receive daily emails.

✿ The delivery of these daily emails is automated, however the emails will appear to be sent from your funeral home. Your firm's name will appear in the signature and in the subject line as well.

[<< Increase Your Aftercare Services](#)


[52 Weekly Tip Email Program >>](#)

52 Weekly Tip Email Program

This year-long series of 52 weekly email messages is intended for those who want to be an ally to a family member or friend who is in bereavement. These messages include insightful literary quotations and provide suggested ways to support the grieving; but also focus on developing strong self-care practices for the caregiver. Cross-cultural insights are also offered, widening our appreciation of the scope and importance of the tasks involved in caring for the bereaved.

✿ If you would like to have this added to your website, please [contact your Success Coach](#).

Your families will see the box, as shown below, where they can enter their name and email address.

A screenshot of a web form titled "52 Weekly Tips". The form has a dark brown background with a lighter brown central area. The title "52 Weekly Tips" is in a large, serif font. Below it, a paragraph reads: "It's hard to know what to say when your loved ones experience loss. Our weekly newsletter provides insights, quotes and messages on how to provide help during the first year." There are two input fields: "Name" and "Email Address", both with white text labels and white input boxes. Below the input fields are two buttons: "SignUp" and "Clear", both in a tan color. To the right of the input fields is a realistic image of a yellow rose with green leaves.

Once submitted, the person will receive daily emails.

✿ The delivery of these daily emails is automated, however the emails will appear to be sent from your funeral home. Your firm's name will appear in the signature and in the subject line as well.

[<< 365 Days of Healing Email Program](#)

[AfterLoss Subscription Program >>](#)

AfterLoss Subscription Program

Today's families want to feel truly cared for and you may think your firm must spend a lot of money establishing a grief support program. But, the AfterLoss app makes it truly affordable for you to gift your families with a subscription to the AfterLoss Program. Simply add a family's contact information and hit "subscribe". Every month, they will receive an 8-page help-letter to gently guide them, step-by-step, through the grieving process toward recovery.



If you would like to have this added to your website, please [contact your Success Coach](#).

Open a record > AfterLoss.

When the informant information is entered in a Standard Record, the one-write logic will populate the Addressee section. The informant information is not contained within a Web Only record, so it will have to be entered in the Addressee section.

- Name – Enter the name of the person to receive the information.
- Country
- Province/State .
- City
- Address
- Postal/Zip Code

Billing:

- Name – Enter the name of the person paying for the information.
- Country
- Province/State
- City
- Address
- Postal/Zip Code

When complete, click the 'Request Subscription' button. The

information will submit to AfterLoss to manage. To send to more than one address, replace the addressee information.

Addressee	
* Name:	<input type="text"/>
* Country:	Canada ▼
* Province/State:	<input type="text"/>
* City:	<input type="text"/>
* Address:	<input type="text"/>
* Postal/Zip Code:	<input type="text"/>

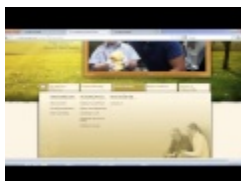
Billing	
* Name:	<input type="text"/>
* Country:	Canada ▼
* Province/State:	<input type="text"/>
* City:	<input type="text"/>
* Address:	<input type="text"/>
* Postal/Zip Code:	<input type="text"/>
* Email address:	<input type="text"/>
* Preferred Payment type:	Bill me ▼

[<< 52 Weekly Tip Email Program](#)

[The Grief Center >>](#)

The Grief Center

This Grief Center app provides supportive guidance on funeral planning, grief support and how others can help the bereaved. The Center is packed with more than 35 articles, tips, and important information pieces for your families.



✿ If you would like to activate in your system, [contact your FrontRunner Success Coach](#).

This app will create new sections on the website that provides content.

<div>  <div> <div>The K.W. Montroy Difference</div> <div>Funeral Planning</div> <div>Grief & Healing</div> <div>Help & Guidance</div> </div> </div>			
<u>Helping Yourself</u>	<u>Helping Others</u>	<u>Planning the Tribute</u>	<u>We're Here to Help</u>
How to Help Yourself	How to Help Others	Why a Funeral Tribute?	Contact Us
Myths About Grief	Basics of Grief Support	Personalize the Tribute	
Cherish & Share Memories	What to Say & What Not to Say	Meaningful Music, Readings and Eulogies	
Remember Them on Special Dates	Give the Gift of Memory	Who to Include	
365 Days of Healing	When They Return to Work	Write a Reflective Obituary	
	52 Weekly Tips	Preserve Keepsakes and Mementos	
		Funeral Etiquette	

Please click [here](#) to view an example article called "Importance of the Funeral Tribute".

[<< AfterLoss Subscription Program](#)

[The Remembrance Process >>](#)

The Remembrance Process

The Remembrance Process is a step-by-step process from the time of death until the final farewell. It uses time-tested ways to help families move from grief to remembrance.



If you would like to have this added to your website, please [contact your Success Coach](#).

A graphic will be added to your website with a link to an informational website.

To view the site, click [The Remembrance Process](#).

[<< The Grief Center](#)

[Companies We Partner With >>](#)

Companies We Partner With

FrontRunner partners with the following companies to help create further efficiencies for your funeral home. ASD is a funeral home answering service; staff can enter your first call information directly into the FrontRunner system. And, while not integrated per se, Google Apps is an excellent email service that FrontRunner highly recommends. For more information about either, click on the links below.

- [Animoto](#)
- [ASD](#)
- [Bluefin](#)
- [Business Resource Strategies](#)
- [Director's Assistant/Continental Computers](#)
- [Disrupt Media](#)
- [Eckels](#)
- [Funeral Screen](#)
- [Gmail](#)
- [Halcyon](#)
- [Ionic Services](#)
- [MacKinnon & Bowes](#)
- [Matthews Caskets](#)
- [Messenger](#)
- [Mortware](#)
- [My Tribute Gift](#)
- [MySendOff Stories](#)
- [Northern Caskets](#)
- [Osiris](#)
- [SympathyNet](#)
- [TerraPro](#)
- [W.L. Smith](#)

Animoto

Animoto offers tribute videos that are easy and fast to create.

✿ If you would like to activate in your system, [contact your FrontRunner Success Coach](#) to arrange.

Create Your Video

Open a Record > Digital Video Tributes > Create New Video.

Step #1 – Use the drop-down to select a theme.

When you select a Celebration of Life theme, additional images and video clips are automatically created and transferred to Animoto, along with your selected photos, to create a personalized DVD Tribute video that includes the decedent's name and dates, and the funeral home's name and logo.

- **Preview DVD Case** – Allows you to view the DVD case using the theme chosen.
- **Sample Video** – Allows you to view the sample video with the theme chosen.

A theme encompasses additional images and video clips that are specifically designed to complement the main theme of the video. These interludes are designed to shift the momentum and give a warm cinematic feel to tribute videos. These are all professionally made and give that “special touch” to your client families.

Step #2 – Selecting a music track for the tribute video. You have three options:

- Select one of FrontRunner's exclusive tracks for funeral services
- Select a track available in Animoto's library of music
- Implement your own music

✿ **Note:** Licensing for popular music is the responsibility of the funeral home

We've made it seamless for you by providing the most appropriate music right at your fingertips. Preview Music to sample our suggested tracks.

Step #3 – Select the images you would like to use to create your tribute video.

✿ Note: Only family approved photos are listed if the Photo Approval System ([Global BOM Settings](#)) is turned on, otherwise all photos are listed.

Photos uploaded to a FrontRunner system's client records are displayed here. You can mark the photos you would like included by putting a check mark in the top left corner; click anywhere on the photo for the check mark to appear/disappear. You can easily choose all photos or un-select all photos. Choose Select All or De-Select All . To view more photos than the 8 listed, just click Next to take you to the next page. You will notice this button located centred and directly beneath the photo listing.

✿ Note: If you want to change the order of the photos, please wait until all assets are transferred to Animoto. There you will find a simple-to-use interface to re-arrange the photos.

Step #4 – Once selections are complete, click Submit to Animoto.

This will gather the name, dates, theme selection, video clips, music selections, photos, and even your funeral home logo (if FrontRunner Professional has it on file) and send it to Animoto for completion. This button will take you directly to the Animoto account page.

! Note: If you have not yet setup an Animoto account, you will need to do so first. After sign-up is complete, you will be sent to the Animoto Create Video page. You will then be able to put on the finishing touches.

If you are already logged in this will import all of the assets selected and allow you to put the finishing touches on the video, otherwise, please log into your account.

Step #5 – You are now in your Animoto account.

This section will let you re-arrange the order of photos. It will also allow you to add any photos or video clips that the family may have provided or just want included in the video. You can also let your creative side take over and add in special features such as text boxes, spotlights, or picture enhancements. At anytime you can drag the slides around and drop them where you wish to place it.

You will notice that there are extra frames located throughout the video, and especially at the beginning. These are part of the introduction video and theme that are strategically placed

throughout the video. There is no need to move or delete these pictures/videos unless you choose to do so. However, we have received tremendous feedback for using this asset throughout our tribute videos.



This button allows you to add more photos or videos clips to the project, however, we highly recommend uploading the photos into your FrontRunner system then re-submit to Animoto as a new project. There is no way to get new photos from Animoto back to your system so they will not be displayed in the Book of Memories.



Click this button to add a text slide. Once added you can click and drag this slide anywhere in the timeline.

Here's a list of suggested text titles:

Male

- Devoted in every aspect of his life
- Touched so many lives. An inspiration to us all
- A husband. A father, a friend
- Guided us Always. Will never forget.
- Forever in our hearts. Memories of a Lifetime
- Always a father first
- Strong Presence, Kind Heart
- Devoted Father, Loving Husband
- An Inspiration to Others; A Family Man

Female

- Devoted in every aspect of her life
- A love of life. A love of family and friends.
- A touch. A smile. Always with us.
- A teacher of life. Thanks for showing us the way
- Forever in our heart. Memories of a lifetime.
- Led by Example. Forever a Mother
- Loved Wife, Devoted Mother
- Kind Woman, Warm Hearted

Veteran

- Courage Honor Respect. An inspiration to us all
- Serving Our Country. Protecting us all
- Devoted in every aspect of life
- Showing us the way. With unconditional love
- Forever in our hearts. Memories of a Lifetime.
- Duty Honor Loyalty
- Led the Way. Dedicated Soldier

Pets

- With a look. We knew we were loved.
- Faithful forever. Always by our side
- An unforgettable friend. Forever in our heart
- Man's Best Friend
- Special Place in our Hearts
- Rain, Wind, or Snow. Always by our Side



The spotlight feature highlights a particular image (or multiple images) that tells the Animoto engines to sustain the slide longer in the video. Each video is paced according to the rhythm and genre of the accompanying song. The spotlight feature makes that slide stand out in the final render.

To activate this feature just click on the picture you want spotlighted once and then click on the spotlight button at the bottom of the page. You can do this to as many pictures as you wish.



Tip: Hold the CTRL key while clicking on multiple photos and click spotlight once to spotlight all of them.



Rotate will move the selected photo 90 degrees to the right. Click on the photo you would like to rotate, then click the rotate button as many times as you like to put the photo in the right orientation.



This feature will replace the photo chosen and allow you to put it elsewhere in the timeline. Click on the photo once and then click the duplicate button. This will place the photos side-by-side.

Once there you can click and drag the photo anywhere in the timeline.



Delete will remove the selected photo.

Click on the photo you would like removed, then click the delete button.



The Shuffle option will re-arrange the order of all images/videos/text slides in a random order, however, **do not** ever shuffle your video. Photos and video clips have been placed in a specific order to help the flow of the video.

Step #6 – When complete, select the Done button.

Step #7 – Choose your music

If you have already selected a music track on the FrontRunner side, then you can skip this step by clicking on Continue. If you haven't selected a track yet, click change your soundtrack and you will be walked through the process of selecting or uploading a music track. (Animoto will always suggest a music track for you) Animoto music tracks are varied and include songs from many genres: romantic, top 40, classical, new age, religious, etc.

Select – Allows you to pick music from Animoto's selection. Browse through the categories. Click the icon to choose a song.

Upload – Allows you to upload music from your computer. **Please make sure you have the proper permission from the artist or label.**

Step #8 – Customize your video.

- **Image Pacing** – Should be set to ½ speed. This gives the delicate and soothing pace that is appropriate for a funeral service.
- **Video Length** – Should be set to Full-Length. The short option limits the video to 30 seconds and this simply isn't enough time to communicate the value of a tribute video.
- **Video Style** – DVT sets the default to The Animoto Original. This is done so that the added interludes and images complement each other in the best way possible. We encourage clients to try different styles but we have found the best results by using the original style.
- **Options** – These options are to play video specific credits at the end of the video, NOT funeral home specific. This is why we recommend that both boxes be checked prior to continuing. This means that only the funeral home information will be shown in the video. You will notice that FrontRunner

Professional automatically puts your funeral home name and logo (as long as it is on file) at the end of the video.

Step #9 – Enter a title of the video.

Example: In Memory of....

Step #10 – You do not need to enter a description.

Step #11 – For the Producer Name, you can enter your funeral home name.

Step #12 – Advanced Options – enter your funeral home name for the title and your website address for the URL.

This will place your funeral home name and a link back to your website on the last slide. **All information placed in this section is for the benefit of organizing your videos in Animoto. These fields will have no effect on the actual video itself or the video on your website once linked.**



All videos are kept in the My Videos section of Animoto, which means you don't need to store them on your computer and occupy hard drive space. Every time you send information to Animoto from your FrontRunner System, a new project will be created.

Step #13 – Select the Create Video button to start the generation process.

Generation times can vary slightly depending on the number of photos and assets used in videos. Creation should only take minutes. Click on the My Videos link at the top and wait for your video to finish producing.

After you have completed creating a video in Animoto, you may:

- [Link it to the Book of Memories Video Tribute](#)
- [Print the DVD case sleeve and disc label stationery.](#)
- [Transfer to Disk/Media](#)

For more information on using Animoto, please [visit the Animoto Helpdesk](#).

[<< Companies We Partner With](#)

[ASD >>](#)

ASD

ASD is an Answering Service that is solely dedicated to Serving the Funeral Profession. We have developed software that can integrate directly with ASD. This integration will enable you to reduce your data entry by uploading information directly into ASD's systems. For more information, please visit the [myASD](#) website.

✿ If you would like to have this activated in your system, please [contact your Success Coach](#).

To register your system with ASD, navigate to System Settings > MyASD.

Your ASD client (or mailbox) number and password are required to register. Enter the information and click Register MyASD Account. When validated, a pop-up will appear: "MyASD has been successfully registered". If the information is invalid, the pop-up will say: "Incorrect Client ID or Client Password". If the problem persists, contact ASD to ensure you have the correct information.

Once registered, the ASD Account Status field will switch to "Registered".



Register MyASD Account

Register MyASD Account

Register MyASD Account

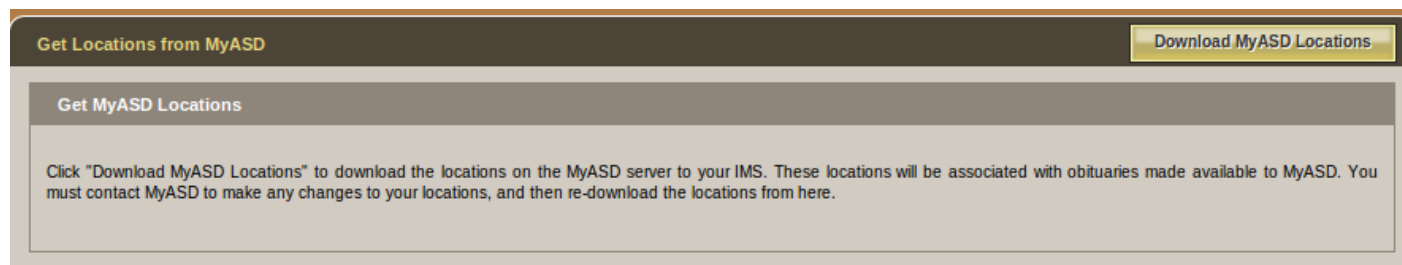
MyASD Account Status: Registered

MyASD Client Number:

MyASD Client Password:

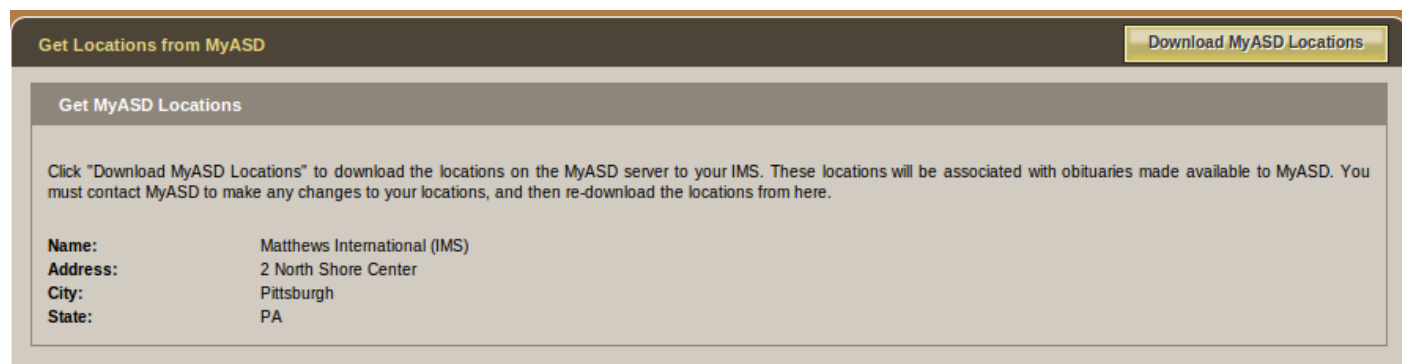
Get Locations

Select the "Get Locations from MyASD" option.



Select Download MyASD Locations to download any locations tied to your website. Locations will later be attached to a death record and made available to ASD. In order to make any changes to your locations, contact ASD.

Once locations are downloaded, the message will read “MyASD locations have been successfully downloaded”. Click “OK”. The screen will refresh and the locations will be displayed.



If there are any download issues (“Unable to download MyASD locations”), try again at a later time. If the problem persists, contact support@frontrunner360.com.

Reporting to and from ASD

Two services can be used with the ASD service:

Obituary Export: Provides data to ASD whenever a record is updated in your system. This service can be activated or deactivated in each record. To activate this service, open a record and click Edit Record Settings. **MyASD Locations** – Select a location and click Save. Anytime a record is edited, the information will be reported to the ASD service.



Edit Record Settings

System Switch

Publish to web: Yes

MyASD Locations : Matthews International (IMS)

Current / Past : Force this record to be a CURRENT fu

File Number: KWMFH-2009-04-20-2

Buttons: Delete Record, Save, Cancel

First Call Import: Allows the ASD service to receive calls on behalf of the funeral home. The information received by ASD is imported on demand.

To import information to a new record from ASD, navigate to the Arrangement tab > MyASD Management > Import Deaths from ASD.



Import Deaths from MyASD Import MyASD Deaths

Instructions

Click 'Import MyASD Deaths' to import any recent deaths reported to MyASD

Previously Imported

Client Name	File Number	Date Of Death	Service Date	Date Called	Date Imported
Ferguson, Larry		2010-04-20 17:32:18		2010-05-25 15:23:51	2010-05-25 15:24:03
Un-Confirmed		2010-04-20 17:51:32		2010-05-25 15:23:51	N/A
Un-Confirmed		2010-04-20 17:29:42		2010-05-25 15:23:51	N/A
Un-Confirmed		2010-04-20 17:27:58		2010-05-25 15:23:51	N/A

Click Import MyASD Deaths to download any of the newly reported deaths since the last import. The pop-up will read: "Successfully imported # record(s)". Click "OK" to refresh the screen. Any new records will display as Un-Confirmed.

Previously Imported: Record Type Filter: All

Client Name	Date Called	Date Imported	Date Confirmed
Ferguson, Larry	2010-04-20 17:32:18	2010-05-25 15:23:51	2010-05-25 15:24:03
Un-Confirmed	2010-04-20 17:51:32	2010-05-25 15:23:51	N/A
Un-Confirmed	2010-04-20 17:29:42	2010-05-25 15:23:51	N/A
Un-Confirmed	2010-04-20 17:27:58	2010-05-25 15:23:51	N/A

Click a row to view more details and sort the table by clicking on any of the headers.

- * If any record is deleted from the system, the name changes to “Record Deleted”. The deleted record will remain in the list so the system could import it in the future.

Confirm Records

Information reported to ASD

First Call

Location Id: D3C235C5-BE25-4ACB-ABAD-F2150FA08EBF

Prearrange: true

Asd Account: 1011

Rep

Dispatched: test

By: WIC

Date Time: 2010-04-20T17:31:34-04:00

Caller

Confirm As Web Only Confirm As Standard Close

When a record is first imported, it is marked as Un-Confirmed. The funeral director can then verify the record before it is created in the system. To view the details provided from ASD, click the row marked “Un-Confirmed”. The record can then be confirmed as Web Only or Standard. Once confirmed, the new record will automatically open.

Viewing Previously Confirmed Records

Any records previously confirmed are displayed in green. When clicked, the record will open in the system.

If the Import MyASD Deaths button is clicked but there are no records to import, a pop-up will say: “No deaths found since last import”.

- * For easier viewing, choose the type of “Record Type Filter” at the top right: The options are “All”, “Un-confirmed”, or “Confirmed” records.

[<< Animoto](#)

[Bluefin >>](#)

Bluefin

In today's changing market, families are looking for more choices, more options, and more convenience when it comes to paying for funeral-related products and services. For many, using a line of credit is essential. Bluefin and FrontRunner Professional have put together a comprehensive all-in-one payment solution offering the most competitive rates on the market. ConsumerSide is designed with both the new consumer and the funeral home in mind, under a shared belief that "When you put families first, they'll take notice".

The integrated and eCommerce enabled product catalogue and virtual showroom provide convenience for your families and allow you to instantly take advantage of the vast new opportunities the online market has to offer.

Funeral Service Savings Plan

We are currently working with legislators and pre-need professionals to develop a new approach to setting aside funds for final expenses. This new product will help provide the flexibility and choice that new families are seeking.

It Costs Nothing to Get Started

It may be hard to believe, but there are no start-up fees! Sign up with ConsumerSide today to give families access to your complete virtual showroom and catalogue, and the payment flexibility they need. You will have the security you need. It's a win-win and costs nothing to enrol.



Contact your [Success Coach](#) for more information. Feel free to contact Bluefin by visiting www.bluefin.com or calling 1-800-675-6573.

[<< ASD](#)

[Business Resource Strategies >>](#)

Business Resource Strategies

Business Resource Strategies is a professional consulting company, providing client specific solutions to small and medium sized businesses. Our focus is providing our clients with custom human resource solutions and client satisfaction insights designed to build your team and better understand what your clients are telling you. Please feel free to visit the [BRS](#) website to learn more.



If interested in this program, please [contact your FrontRunner Success Coach](#).

[<< Bluefin](#)

[Director's Assistant/Continental Computers >>](#)

Director's Assistant/Continental Computers

Director's Assistant and FrontRunner have partnered to give you a one-write logic system. Enter your client data into your management system and push it to FrontRunner to add to your website and create a Book of Memories.



If you would like to activate in your system, [contact your FrontRunner Success Coach](#).

[<< Business Resource Strategies](#)

[Disrupt Media >>](#)

Disrupt Media

At DISRUPT Media all we do is social media, and we have a proven measurable process for doing it.

We help bold, forward-looking brands build socially disruptive strategies through ideas and storytelling.

What makes social media so powerful and compelling sometimes isn't the numbers, but the stories. Specifically, it's the stories people tell each other about their lives, about their interactions with companies, about everything else they do.

"SOCIAL MEDIA Marketing without a STRATEGY is like eating soup with a FORK...you miss all the good STUFF!"

RYAN THOGMARTIN — DISRUPT MEDIA, CEO

Please feel free to visit the [Disrupt Media](#) website to learn more.

Socially Acceptable by FrontRunner Professional and DISRUPT Media

FrontRunner Professional & DISRUPT Media have teamed up to bring you Socially Acceptable.

We can develop your social media plan for you or completely manage your online social strategy on your behalf. Here is what you can expect:

1. Extensive Research

It's impossible to know where you're going without understanding where you've been. The initial phases of a focused social media plan for your firm involve both online research performed by the DISRUPT Media team and two in-person strategy-building sessions. Timely submission of related reports, including the Distribution Brief, will document our findings and set the stage for the implementation and management of your social media strategy.

2. In-Depth Strategy Sessions

Successful use of social media channels requires that we all come together in the same room to discuss your current use of social media, deepen our understanding of your funeral firm mission, vision and service offerings; establish a set of shared goals, and determine specific key performance indicators which will help us to measure our success. This happens during the Kick-Off Meeting. The IDEA Session, — where the DISRUPT Media team works closely with you to determine ideas and stories surrounding your firm that

customers, loyal supporters and funeral professionals find interesting — will help us to add the “spark” to your social media presence.

FrontRunner will even pass all website assets and other pieces of your online strategy to DISRUPT media to make sure your online brand is consistent across all channels.

3. Focused Implementation and Management

As any military strategist will tell you, a plan-of-action is useless without masterful implementation and effective management of the forces involved in the campaign. The same philosophy applies to social media. The team at DISRUPT Media will take charge of all day-to-day activities involved in the promotion of your social media presence. They will create the dialog, nurture and engage your social audience, build your brand, and add real value to the social conversation.

4. In-Depth Reporting

Monthly analytics reports allow you to track the performance of everything being done for you in the social arena. You can compare network performance and fully understand the impact of your social media campaign. Every month, we'll measure your funeral firm's influence, the sentiments held by your audience in response to your social activity, and the volume — the amount of buzz surrounding your brand. All actionable information is delivered in a highly-digestible format.



If you are interested in this program, please [contact your FrontRunner Success Coach](#).

[<< Director's Assistant/Continental Computers](#)

[Funeral Screen >>](#)

Funeral Screen

Funeral Screen has a Digital Signage Software platform which allows you to display personalized announcements and presentations and update display content from any browser with an internet connection. We help funeral home transition away from felt boards with plastic letters or printing impersonal announcements on paper. Please feel free to visit the [Funeral Screen](#) website to learn more.



If you are interested in this program, please [contact your FrontRunner Success Coach](#).

[How to push information from FrontRunner to Signage Studio](#)

[<< Disrupt Media](#)

[Gmail >>](#)

Gmail

FrontRunner Professional does not host or provide an email service for clients BUT we believe Gmail is the perfect solution for your business.

- * FrontRunner Professional is not responsible for how Google Apps works. We are simply recommending this product as we believe it is a good solution. FrontRunner Professional is not responsible for any down-time, lost emails, or any other email related issue you may experience.

How to Create a Gmail Account

Visit the [Google Apps website](#) for more information about how this works and the pricing per user. Google has a great [Help Center](#) available to answer any questions about their solution:

Getting Started Guide

- [Forward email to another email address](#)
- [Import email and contacts from another email provider](#)
- [Hook up your Gmail account](#) to another email program (Outlook, Thunderbird, etc...).

Add Multiple Users

To create more user accounts, click on the Users and groups tab at the top. Click Create a new user.



Enter the first and last names, and username of the new user. You do not need to enter the full email address as it will already have @yourdomainname.com shown. You can set a password for this user, otherwise click Create new user and a temporary password will be generated. The new user will be asked to re-enter a password upon their first login.

Follow the same steps to add more users.

[<< Funeral Screen](#)

[Halcyon >>](#)

Halcyon

Halcyon and FrontRunner have partnered to give you a one-write logic system. Enter your client data into your management system and push it to FrontRunner to add to your website and create a Book of Memories.



If you would like to activate in your system, [contact your FrontRunner Success Coach](#).

[<< Gmail](#)

[Ionic Services >>](#)

Ionic Services

Ionic Services and FrontRunner have partnered to give you a one-write logic system. Enter your client data into your management system and push it to FrontRunner to add to your website and create a Book of Memories.



If you would like to activate in your system, [contact your FrontRunner Success Coach](#).

[<< Halcyon](#)

[MacKinnon & Bowes >>](#)

MacKinnon & Bowes

Since 1966, MacKinnon & Bowes has built a reputation as the largest and most trusted provider of assistance to the funeral service profession. While its core business concentrates on transfers and removals, it also offers expertise in the repatriation of the deceased from countries around the world. Please feel free to visit the [MacKinnon and Bowes](#) website for more information.



For further information, please [contact your FrontRunner Success Coach](#).

[<< Ionic Services](#)

[Matthews Caskets >>](#)

Matthews Caskets

FrontRunner has all of the Matthews products pre-loaded into the system. This will allow you to quickly showcase your products on your website and/or virtual showroom. FrontRunner has also given your families the option to customize items such as embroidery lay, cap panels and corners.



For more information, please [contact your FrontRunner Success Coach](#).

[<< MacKinnon & Bowes](#)

[Messenger >>](#)

Messenger

Messenger gives Funeral Homes the ability to easily create and print high quality, professional looking and highly personal memorial products within a matter of minutes! Messenger and FrontRunner have partnered allowing you to quickly export your client data and import it into your Messenger program. Please feel free to visit the [Messenger](#) website for more information.



If you would like to activate in your system, [contact your FrontRunner Success Coach](#).

Stationery Printing

Open a record > Printing > Messenger Export.

Select the 'Export to Messenger' button.

Open your "Make It Personal" software from Messenger and click the 'Import From Management Software' button.

Click 'Browse' and locate the XML file on your computer downloaded from the FrontRunner system. The file will likely be contained in your computer's download folder unless you saved it to another location.



The image shows a software dialog box titled "Import Case Profile" in a cursive font. The title bar is dark blue. The main area is white. It contains a label "Select a location:" in brown. To its right is a text input field with a small downward arrow on the right side. Below the input field is a blue button with the text "...Browse" in white. At the bottom right are two buttons: a grey "CANCEL" button and a blue "UPLOAD" button. A mouse cursor is pointing at the space between the "...Browse" button and the "CANCEL" button.

Begin using the Make it Personal Program with the new data.

[<< Matthews Caskets](#)

[Mortware >>](#)

Mortware

Mortware and FrontRunner have partnered to give you a one-write logic system. Enter your client data into your management system and push it to FrontRunner to add to your website and create a Book of Memories.



If you would like to activate in your system, [contact your FrontRunner Success Coach](#).

[<< Messenger](#)

[My Tribute Gift >>](#)

My Tribute Gift

Learn about My Tribute Gift, the background, and why FrontRunner chose to partner with them for donations.

When FrontRunner looked into developing an online donation system, we met with countless charities that confirmed the dramatic decline in memorial donation giving throughout North America. All of these charities shared with us their deep concerns that without these donations, the ability to fund activities in support of their communities is in jeopardy. There are several explanations for the drop in donations:

1. The growing number of funeral homes that have moved to the honor-based practice of providing envelopes for donors to put a check in and mail directly to the charity. Only a small percentage of the donations are actually sent to the organizations.
2. Online donations are growing faster than any other form of charitable giving yet 99% of charities are small, local charities (like churches) without the financial means or administrative capabilities to accept online memorial giving.
3. The rise in cremations without services results in fewer opportunities for the public to place a donation.
4. Many funeral home websites direct visitors to a list of charity websites but unfortunately, only larger charities are able to accept and process online donations. This is not a very helpful or considerate resolve for small, local charities, which are simply out of luck.

The cost to fundraise is challenging for any charity. While the ultimate goal is to direct all donor dollars directly to the cause, the reality is that it costs money to raise money. For example, the American Cancer Society spends \$23 to raise \$100, or 23% of the donation.* The percentage varies from charity to charity but online donation solutions are meant to reduce the cost of fundraising.

True to FrontRunner's philosophy of doing more, we set out to make a difference.

Background

There are countless donation fulfillment organizations that provide secure transactions and conveniences for charitable giving; all are respected and appreciated by charitable organizations. FrontRunner wanted to work with one to create the best solution to help our funeral homes clients and increase charitable giving. FrontRunner set out to develop a system that would achieve a number of goals:

- Allow donations to be captured and tracked, thereby providing critical data for charities on all methods of giving (checks / credit card / cash donations collected at the funeral home);
- Provide families and donors with permanent records of memorial donations on the Book of Memories;
- Provide all sized charities with the opportunity to receive online donations and issue instant tax receipts, a process that for many was unaffordable; and
- Offer an optional online solution on all funeral home websites to create more opportunities for donors to give and for charities to receive at a time when there are fewer traditional funeral services and visitations.

My Tribute Gift Foundation

FrontRunner Professional chose My Tribute Gift Foundation as a way to help charities generate more online revenue and save money.

My Tribute Gift charges a 5% fee to cover the cost of administration, handling, receipting, audit expenses, and monthly check processing. An additional 3% is taken by the credit card companies for processing. The total of 8% in fees (5% fee plus 3% paid directly to credit card companies) is actually a significant savings for most charities compared to the normal cost of fundraising and administration costs. Using the American Cancer Society example, this memorial donation handler's cost of 8% is far less expensive than the standard 23%.

The mission of My Tribute Gift Foundation is to facilitate online giving by the public to any of the over 1-million IRS and CRA registered charities in the U.S. and Canada. Its online portal not only maximizes charitable giving, it removes the onus of donation check management from funeral homes. Once a donation is made, the donor is sent, via email, an official charitable tax receipt. Both the family and funeral home are automatically notified about the donation.

Donation processing normally takes two weeks and then funds are sent to charities on a monthly basis at the end of each month. My Tribute Gift Foundation mails checks but charities are also able to register for direct bank deposits for faster receipt of funds.

FrontRunner Professional

FrontRunner invested \$136,000 in billable hours in this software program in an effort to allow ALL charities, not just the top ten major organizations that can afford an online platform, to benefit from online giving with no investment or ongoing expenses.

A portion of the 5% My Tribute Gift administration fee is directed to FrontRunner to cover the initial development costs. While there are still significant ongoing monthly costs for hosting, bandwidth and

support, once that initial amount is paid, Frontrunner will use these funds to advance our own company's charitable giving. FrontRunner is proud of its ability to support worthwhile charitable causes that save lives and make a difference in this world.

In the spirit of transparency, FrontRunner and My Tribute Gift believe it's necessary to disclose the financial relationship between our companies. It is made very clear to online donors that donations are completed through My Tribute Gift, which is very upfront regarding its administration fees. This is in contrast to some other donation fulfillment organizations that only publish obvious credit card fees but fail to inform donors that they bill charities separately for additional fees.



For more information, please [contact your FrontRunner Success Coach](#).

[<< Mortware](#)

[MySendOff Stories >>](#)

MySendOff Stories

MySendOff Stories contains a library of original articles and stories to you, available exclusively for FrontRunner funeral home websites. You now have a revolutionary way to include an automatic stream of fresh, original articles on your funeral home's website and social media outlets with an informative and educational approach that will direct traffic to your website and help you reach today's generation of funeral consumers.

With FrontRunner Professional and mysendoff.com, you will reach new clients and become the preferred funeral resource in your community and you now have an exclusive new way to extend your website's reach and enhance your image to complement your existing online presence.

As a member of the FrontRunner family, you are now included in mysendoff.com's Preferred Funeral Home Directory with a link to your funeral home's website. This means that your funeral home will be featured when families from your market visit our website. Families work together. We invite you to take a look at what we can offer you.

Please feel free to visit the MySendOff website for more information.



If you would like to have this added to your website, please [contact your FrontRunner Success Coach](#).

[<< My Tribute Gift](#)

[Northern Caskets >>](#)

Northern Caskets

FrontRunner now has all of the Northern Caskets pre-loaded into the system. This will allow you to quickly showcase your products on your website and/or virtual showroom.



For more information, please [contact your FrontRunner Success Coach](#).

[<< MySendOff Stories](#)

[Osiris >>](#)

Osiris

Osiris and FrontRunner have partnered to give you a one-write logic system. Enter your client data into your management system and push it to FrontRunner to add to your website and create a Book of Memories.

✿ If you would like to activate in your system, [contact your FrontRunner Success Coach](#).

[<< Northern Caskets](#)

[SympathyNet >>](#)

SympathyNet

Funeral Webcasting allows grieving family members and friends to be part of the service no matter where they live in the world. FrontRunner software includes integration capabilities for SympathyNet. When a webcasting event is created, both systems generate an invitation email with login information for families to send to those who are unable to attend the service.

✿ You must have an account with SympathyNet to access this feature. Contact Paul@SympathyNet. If you would like to activate in your system, [contact your FrontRunner Success Coach](#).

Setting up Your System

Navigate to System Settings > System Profile > Profile. Open the profile and scroll to the box (shown below) to enter the SympathyNet API Key, provided by SympathyNet.

A screenshot of a web interface showing a section titled "Webcasting (Powered by SympathyNet)". Below the title is a label "SympathyNet API Key" followed by a text input field.

Create a Webcast

Click 'Add Webcast' to activate the feature and edit the Webcast Settings.

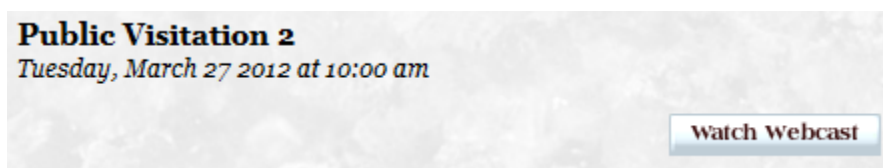
A screenshot of a web interface showing a section titled "Visitation". It contains several form fields: "How Many Public Visitations:" with a dropdown menu showing "1"; "Visitation Location:" with a dropdown menu showing "Montroy Funeral Home" and an "Add" button; and "Visitation Date & Time:" with fields for Year (2009), Month (Oct), Day (27), Start Time (6:30pm), and End Time (9:45pm), along with an "Add Webcast" button.

- Create a Secure Login (user name and password) for families by checking the appropriate box.
- Change the title of the webcast and add the description to appear under the viewing window in the Book of Memories.
- Edit the event date and time to change the times originally entered in the arrangement process.

To change the date or times of the event without modifying the arrangements, select 'Modify Webcast'. Edit a webcast by clicking on the 'Edit Webcast' button. In this section, the date and/or times of the event can be changed without modifying the arrangement dates and times.



To add to the list, click on the 'Add Event' button at the top right. Once the event is added, it will be available in the Book of Memories. The 'Watch Webcast' button will only be available once the webcast begins.



To view all scheduled webcasts, navigate to Main > Book of Memories > Webcasting. All webcasts for all clients are accessible.



If you are experiencing issues with your SympathyNet webcasts or have any questions, please contact Paul@SympathyNet.

[<< Osiris](#)

[TerraPro >>](#)

TerraPro

TerraPro and FrontRunner have partnered to give you a one-write logic system. Enter your client data into your management system and push it to FrontRunner to add to your website and create a Book of Memories.



If you would like to activate in your system, [contact your FrontRunner Success Coach](#).

[<< SympathyNet](#)

[W.L. Smith >>](#)

W.L. Smith

AfterLoss Subscription Program

Today's families want to feel truly cared for and you may think your firm must spend a lot of money establishing a grief support program. But, the AfterLoss app makes it truly affordable for you to gift your families with a subscription to the AfterLoss Program. Simply add a family's contact information and hit "subscribe". Every month, they will receive an 8-page help-letter to gently guide them, step-by-step, through the grieving process toward recovery.



If you would like to have this added to your website, please [contact your Success Coach](#).

Once this is activated in your system, here is [how to use the AfterLoss Subscription Program](#).

Stationery Printing

FrontRunner has worked with W.L. Smith to leverage your single data entry solution to work seamlessly with the stationery offerings. Save time and money by utilizing the software to customize and print beautiful memorial products.



If you would like to have this added to your website, please [contact your Success Coach](#).

Once this is activated in your system, here is how to [print and build your stationery](#).

[<< TerraPro](#)