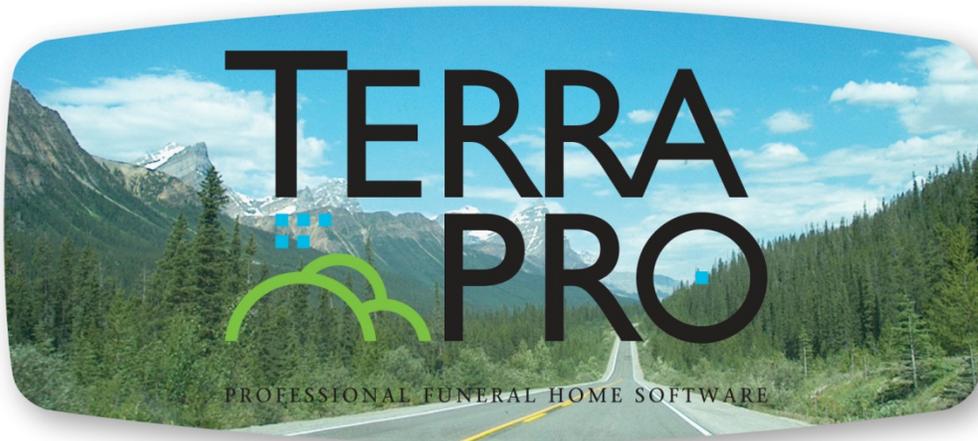


TERRADISE COMPUTER SYSTEMS, INC.

TerraPro Professional Funeral Home Software



TerraPro User Manual

TERRADISE COMPUTER SYSTEMS, INC.

TerraPro Instruction Manual

This Manual Written by
David J. Haldeman, Author of TerraPro Professional Funeral Home Software
Revision 14 – January 2021
For TerraPro Version 9.15.88 and above
© 2003-2021 Terradise Computer Systems, Inc.
6404 Coffey Street
Cincinnati, Ohio 45230
Phone 513.484.9729
haldemandavid@gmail.com
<http://www.terrardise.net>

Entire Manual Copyright © 2003-2021
by Terradise™ Computer Systems, Inc.
6404 Coffey Street
Cincinnati, Ohio 45230
513-484-9729
All Rights Reserved

This manual is supplied separately from the TerraPro program and sells for \$75.00.

Replacement manuals and/or sheets are available at the address above.

The current version of this manual can be downloaded free of charge as a Microsoft Word™ Document or Adobe Acrobat™ PDF file from our website at www.terradise.net

Table of Contents

- Using TerraPro 1**
- Using the Right-hand Mouse Button 22**
- Printing Forms..... 31**
- CardShop..... 33**
- Printing Reports 44**
- AfterCare 46**
- Envelopes and Labels 52**
- Price Lists 56**
- Billing 63**
- Insurance Policies 76**
- Modifying Forms, Reports and Cards 82**
- Crematory 93**
- Utilities 95**
- Appendix A - Behind the Scenes 101**
- Appendix B - Setting up Companies 106**
- Appendix C - Expression Listing..... 111**
- Appendix D - Supplemental Screens 114**
- Appendix E - Crematory 124**
- Appendix F – Australian Version..... 129**

Using TerraPro

How to use TerraPro to save time, avoid data errors and streamline your paperwork.

TerraPro Professional Funeral Home Software is designed to save you time. Although TerraPro was written to be easy to use, this manual can help you by pointing out some of the timesaving features you may have missed while using TerraPro. Throughout the manual, you will see icons (little pictures or figures), which will point out information you may want to remember.

When you see icons next to paragraphs, look for valuable information about topics of interest, test your grasp of a particular subject, or get “hands-on” keyboard experience in trying out various tasks.



We suggest you keep the manual near your computer for quick reference.

Use the Table of Contents or Index to quickly find the answer to the question you have. If you cannot find the answer in the manual, please don't hesitate to

phone us at 513-484-9729 or email us at haldemandavid@gmail.com

How to Start TerraPro



After TerraPro is installed on your computer you will have an icon (pictured at left) on your main computer screen (called the desktop) or on your Windows Start Menu. Using your mouse, move the cursor (usually an arrow – it's the thing that moves when you move the mouse) so that it is over the TerraPro icon (at left) and click twice quickly (this is called double-clicking). If this doesn't start the program, try double-clicking a little slower. If it still doesn't start, use the right-hand mouse button and click once over the icon, then left-click over the word **Open**.



Adjusting the Double Click Speed

The speed of the double click can be adjusted. Click on the Windows Start button, choose Control Panel, choose Mouse, and adjust the Double-Click speed to your liking. Click OK to save and close the Control Panel by clicking the X in the upper right corner.

Choosing a Company

After starting TerraPro, you may or may not see a Company Selection Screen. If you do not, and the program just starts opening files and presents you with the main TerraPro screen as shown below, this means you only have one company set up. When we refer to companies, we mean branches of the funeral home, or Pre-need companies set up to handle the Pre-need cases for your funeral home. Each company provides separate accounting, billing and reporting functions.

- **To setup a new branch or Pre-need company.** See Appendix B, setting up new companies. You will need to obtain a license file for each new company or branch you add, if the name is different. Call TerraPro at 513-484-9729 to revise your license.
- **To select a company,** click on the image of the desired company.
- **To quit without selecting a company,** press the Escape key (upper left of your keyboard labeled “Esc” or click the Quit button

Mouse or Keyboard?

Many times, you can use the Enter or Tab key on the keyboard rather than reaching for the mouse. To navigate (move around) lists using the keyboard, use the up and down arrow keys.



Something to watch for: Occasionally, you may click on the TerraPro icon on your desktop more than once, and you may start more than one instance of the program. This can cause unexpected results, as TerraPro will behave as if two people are using the program at the same time. This is not a problem on a network (two or more computers linked together as one), but it is a waste of resources of your computer.



To assure that you only have one copy, check the taskbar at the bottom of your screen (or top or sides if you have moved it) to see if there is another copy running. If it looks like the task bar shown above, select a copy by clicking on it, and close it down using the Quit button in the lower left corner. Keep closing until you have only one copy of TerraPro running. This same warning applies to other programs you might be running, too. Many users have reported they keep two or three copies running to work on multiple cases, but we cannot guarantee the program to work as described in this manual if you follow this practice.

Main TerraPro Screen

We will refer to this screen often throughout this manual.

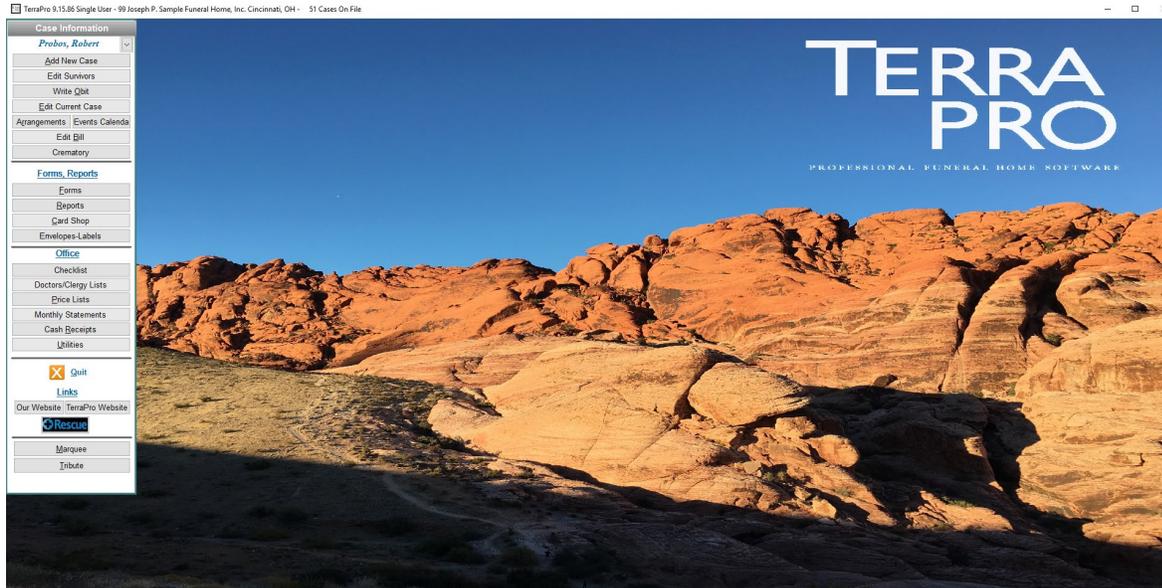


FIGURE 1 Main TerraPro Screen or Window.

If you don't like the picture supplied as background or wallpaper for TerraPro, you can change it!

To change the picture, use the right mouse button and click on it. This brings up a box known as the dialogue box. Dialogue means having a conversation with someone. In this case the computer is asking you a question: *"What picture do you want to use as your wallpaper?"* We will use the mouse to find a file containing the picture you desire.



Let's Do It! TerraPro wallpaper picture files are stored in a folder called images\wallpaper. You also may have pictures in your My Documents/My Pictures folder*. We suggest that all TerraPro related pictures be stored in the TerraPro\Images folder so they may be easily accessed from your network. If you double click your cursor on the folder icon labeled images, then double click again on the folder labeled wallpaper, you will see a list of files describing the wallpaper pictures. Double click it to choose it.

If you cancel choosing a picture, you will get no picture. You will be asked if this is a permanent change, or just for this session. This is handy if you want to have a plain color as your background. Right click on the plain background to change the color. Unless you made this change permanent, the next time you start TerraPro the picture will be back!

Why do all this just for a picture?

Later on, when we print memorial folders with pictures, you will use this same technique to choose a picture for the card. Practicing it now will save you learning time later on when you need cards in a hurry! **Learning to navigate around your computer's files and folders is extremely helpful and strongly suggested.**

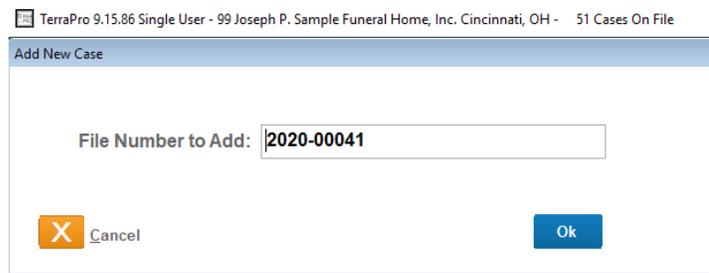
* We STRONGLY suggest you place all funeral related images in the TerraPro Images folder so that all users have easy access to them.

Adding a New Case

TerraPro is setup to allow you to quickly add a new case without having to know all the case information. When you receive a death call (the **First Call**), you can start the case information right away and then update the vital statistics gathered at the family arrangement conference later on.



Let's do it! Click on the Main TerraPro Screen choice labeled Add New Case. The computer will ask for a case number. This is important, as it uniquely identifies each case. Typically, we recommend using the year and then a consecutive number (2021-001 for the first case of the year 2021). You can setup other numbering schemes if required, but we suggest one that will allow the cases to be put in order by file number for easy retrieval.



If you are happy with the file number, just click ok or press enter. Don't worry, TerraPro has already checked to see if the file number is unique and won't let you enter a duplicate file number.

If you need to change the file number, edit the file number to your liking. Keep in mind that TerraPro will verify that the file number you enter does not already exist, but it won't keep you from skipping a file number. If in doubt, click Cancel and then pull-down the list of cases and check the most recent file numbers. *To start a new year, just type over the existing year to change it.*

To reset the automatic file number sequence, Choose Utilities, Setup. On the Preferences screen you will find a field called "Last File number Used". Change it to the last file number used – click on the Quit button and answer Yes to "Update System?"

You can renumber a case file number at any time, so don't spend a lot of time fussing about the file number if you are not sure, or if you make a typing error. Select the case you want to renumber from the pulldown list of cases, then choose Utilities, Renumber, and follow the on-screen instructions.

First Call Screen

For states with Online Death Registration Systems, you can enter data online first, then come back after exporting the data and bring it in to TerraPro. Each state has a different method for accomplishing this, so refer to [our website](#) for specific instructions for your state. Choose whether you want to enter the information on the Online system or locally in TerraPro first:

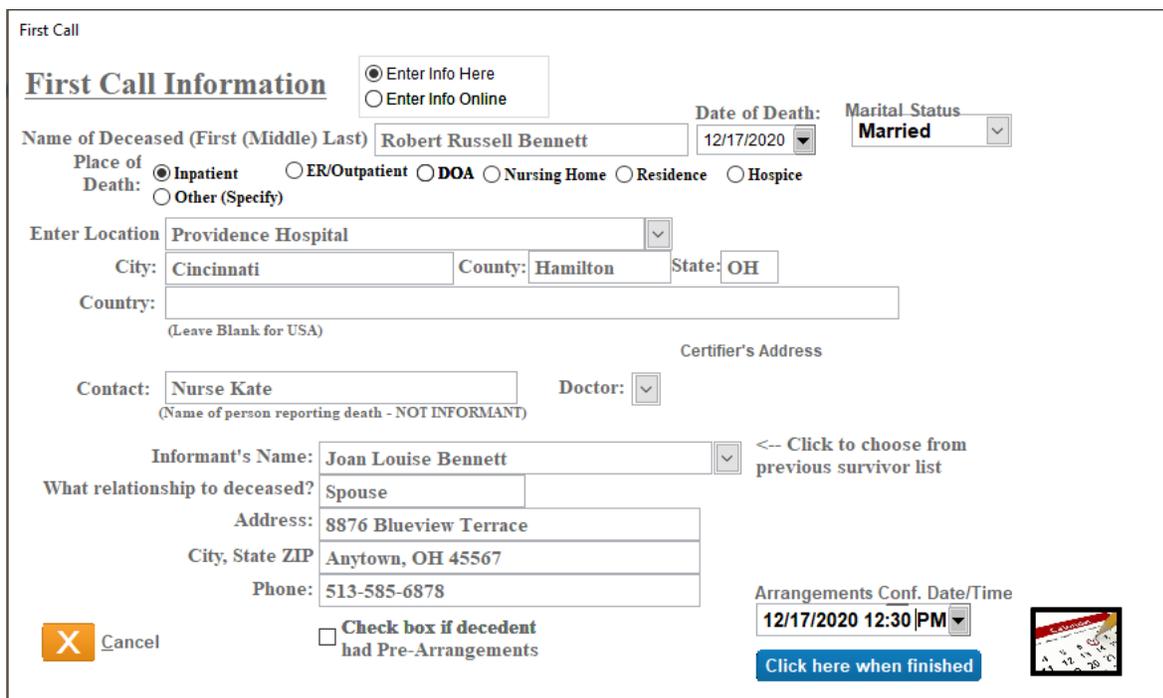


First Call

First Call Information

Enter Info Here
 Enter Info Online

The information you will type in on this screen is the basic information you might know after receiving the death call. If you don't know the information, just skip over it, because you can always enter it later. However, the more you enter here, the better TerraPro can help with information entered later. In most states, you can enter the information online and have the certified copies of death certificate sent to you as soon as the doctor electronically signs it.



First Call

First Call Information

Enter Info Here
 Enter Info Online

Name of Deceased (First (Middle) Last): Robert Russell Bennett Date of Death: 12/17/2020 Marital Status: Married

Place of Death: Inpatient ER/Outpatient DOA Nursing Home Residence Hospice Other (Specify)

Enter Location: Providence Hospital

City: Cincinnati County: Hamilton State: OH

Country: (Leave Blank for USA)

Contact: Nurse Kate (Name of person reporting death - NOT INFORMANT) Doctor:

Informant's Name: Joan Louise Bennett <-- Click to choose from previous survivor list

What relationship to deceased? Spouse

Address: 8876 Blueview Terrace

City, State ZIP: Anytown, OH 45567

Phone: 513-585-6878

Arrangements Conf. Date/Time: 12/17/2020 12:30 PM

Check box if decedent had Pre-Arrangements

Figure 2 - First Call Screen

Enter the **name of the deceased** in standard format: John William Doe (first, middle, last). If the person has a hyphenated last name, enter it like this: Mary Beth Smith-Doe. Keep in mind the case will be alphabetized under Smith-Doe, not Doe-Smith. If you do not know the full name, just enter as much as you know; you can always change it later.

Pressing Enter or Tab will allow you to enter the **date of death** (if known) (be sure to use zeroes in front of single digit days and months). Use the pull-down calendar for easy and accurate date entry. *Hint: for dates falling in the current year, you can just enter the month and day – the year will be automatically entered.*

Note:

You may notice that sometimes the cursor seems to jump ahead to the next entry spot (called “fields”). This is because you have reached the end of one field by filling it completely with data. If you don’t reach the end by typing information, you **MUST** press Enter or Tab to go to the next entry spot. You will soon get used to this feature and know when to press enter and when you don’t need to!

Choose the **place of death** by clicking on one of the choices required by your state death certificate. Or you can use the left or right arrow key to highlight the desired place and then press the space bar to select it. Depending on your choice, the next line will allow you to enter the address of the place of death (if residence) or the facility name (hospital, etc.) If the facility does not exist on your list of facilities, TerraPro will ask if you want to add it.



Note:

When adding new locations to your list, we **highly recommend you fill in the address, city, county and state, otherwise these fields will be blank**. If you add this information, the next time you select this facility (by using the pull-down list), the city, county and state will be filled in for you.

The **contact** is the person who called you about the death (not necessarily the next of kin or informant). This is **optional**, unless you want to be able to reach the person with any questions that may arise before the body is transported to the funeral home.

The **informant** is the person who will give the funeral director the information about the deceased. If not known at this time, leave blank – it can be added later. If you are serving a family you have served before, you can choose the informant from the pull-down list.

The **relationship of the informant to the deceased is important**. It can help if you know the relationship, because if it is the spouse, it can save entry of that information later on. Use the FAMILY relationship using full words like son, daughter, sister, brother, wife, husband or spouse.

Enter the **address and phone number of the informant**. If the deceased died at home, and the relationship of the informant is spouse, the address will be automatically copied from the place of death entered above.

The date and time of the **arrangements conference** can be entered here and is then available on your calendar and on the informant screen.

After you have filled in the information, press the button labeled “**Click here when finished**”. TerraPro will ask if the informant is also the person responsible for the bill. **If not sure, you might want to answer yes anyway, because you can very easily change the person responsible later.**

Editing Case Information

Once the case has been added to the system, you can finish entering data using the information screens. If the deceased's name does not show at the upper left, click on the down arrow to open the list of cases. Right clicking will alphabetize the list, Right-clicking again will put in file number order.¹



If the case information screen is not open, use the Edit Existing Case button on the main TerraPro screen menu to open it.

Hint:

If you want to enter the obituary before entering the case data, you can do so by selecting Write Obituary from the main TerraPro screen, or clicking on the Obituary tab of the case information screen.

The case information screen shows information devoted exclusively to this case. For the different aspects of case information, there is a separate tab: *Vital Statistics*, *Disposition* information, *Service* information, *Obituary* and if the deceased was a veteran, tabs for each of the veterans forms. Clicking on a tab will select that tab.

VITAL STATISTICS SCREEN

The screenshot shows the 'Vital Statistics' screen for Robert David Probos. The interface includes a header with the file number '2015-004' and the name 'Robert David Probos'. Below the header are several tabs: Vital, Disposition, Service, Obituary, Benefits I, Benefits- II-IV, Flag, Marker, and Marker II. The 'Vital' tab is active, showing fields for Name of deceased (Robert David Probos), Sex (M), Nickname (Butch), Social Security Number (123-45-6789), Birthdate (02/21/1936), Deathdate (12/17/2020), Time of Death (8 AM), Age (84-9-26), and If under 1 day (02/30). There are also checkboxes for 'SENSITIVE' and 'Update From EDRS'. The 'Place of Death' section includes fields for Nursing Home, Foreign Cntry?, Facility Name (Roger Hemmerly Memorial Rest Hom), City (Daytona Beach), Inside City Limits? (N), County (FL), and State (FL). The 'Occupation' section includes fields for Employer (Baker), Business (Kroger), Yrs Employed (25), and Still Actively Working? (checked). The 'Residence Address' section includes fields for City, State, ZIP (Cincinnati, OH 45230), County (Hamilton), Inside City Limits? (Y), and On Farm? (checked). The 'Marital Status' section includes a dropdown for 'Separated' and a field for 'Mr. Probos was a 1963 graduate of Withrow High School, and'. The 'Citizen of' section includes fields for Origin (Yes, Puerto Rican), Race (Native Haw), Education (6. BACHELORS DEGREE (E.G., BA, AB, BS)), and K-12 College Education History (Mr. Probos Graduated from Maric). The 'Father' section includes fields for Name (Sator John Probos) and Mother (Mary Ellen Sator). The 'Informant - Spouse' section includes fields for Name (Georgia May Foolery), Address (1536 Whetstone River Rd N), City, State, ZIP (Caledonia, OH 43314-9458), and Phone (740-383-9657). There are also checkboxes for 'In Armed Services?' (Y), 'Military Status' (V), 'Type of Discharge' (Honorable), 'Burial Benefits Claimed: (Honorable Discharge Only)', 'Burial Benefits' (checked), 'Flag' (checked), 'Marker' (checked), and 'Presidential Memorial Certificate' (6).

Figure 3 - Vital Statistics Screen

Most of the data entry on this screen is self-explanatory so we will cover only those items needing elaboration.

Last name

Although many states require that the last name be all UPPER CASE on the death certificate, **do NOT enter it using upper case letters**. It will be formatted when you print the death certificate

¹ If your file numbers do not indicate the order in which the cases were entered, use Utilities/Setup to make this list show in reverse death date order instead of file number order.

or other forms that need it in UPPER CASE. If you enter it in UPPER CASE, It will show up that way in places that would be inappropriate, like the memorial merchandise.

Birth and Death Dates

When entering dates, you MUST enter single digit months and days with a leading zero, so for January 5, 2021 enter 01/05/2021. If the year is in the current century, you do not need to enter the full four-digit year. If it is the current year, just enter month and day. The year will fill in. You can also use the pull-down next to the date to choose a date from a calendar.

Time of Death

Free form – enter in any format

Age (Years, Months, Days)

This will be automatically calculated from the entry of birth and death dates.

Birth State

Use the two-character state abbreviation. If in doubt about the abbreviation, use the pull-down list by clicking on the arrow next to the state entry.

Facility Name (or Residence Address)

If the place of death was not at home, you can pull-down a list of previously used facilities. Of course, if you already indicated the facility name or place of residence on the First Call Screen, this information will already be there.



Editing Locations

Use the right-hand mouse button to click on the pull-down list arrow and you will be presented with the Location Editing screen. See details on using this screen in Chapter Two.

TOOL TIPS

Tool Tips are the little help messages that appear as you pause the mouse over a data entry field.

For example, the military honors that a veteran was awarded can be listed in the Honors field on the Vital Statistics Screen (only visible for veterans)



As your mouse passes over this field (without clicking) the tip shows up for a few seconds. Using these “tool tips” can save you time, since you may not need to look in this manual to find an explanation for this data item.



What are those brackets for?

The information shown in brackets, for example, [VETERANS.Honors] tells us what data table and field the information is stored in. Later, when

you feel comfortable designing your own forms, you use this information to pinpoint the data item you wish to show on a form.

**DISPOSITION
SCREEN**

This screen allows you to enter information about the final resting place of the deceased. You can choose the method of disposition by pulling down the list of acceptable types of disposition. Then you can choose the location of disposition from a list of cemeteries or crematories. This pull-down list works like the one on the Vital Statistics screen, right clicking allows you to edit the list.

File Number 2015-004 **Robert David Probos** Maximize Screen

Vital **Disposition** Service Obituary Benefits I Benefits- II-IV Flag Marker Marker II

Method of Disposition: Cemetery: Cemetery Location: (City, State) Crematory:
 Cremation Little Hope Baptist Cemetery Albany Creek, Queensland Greater Cincinnati Crematory

Place of Inurnment: Scattered in the Olentangy R Cemetery to Receive Remains Place of Inurnment County Scatter
 Inurnment City, State: 1536 Whetstone River Road Notes about Disposition: 1/2 go in the River at Terradise, other h

Service Date: 12/19/2020 Cremation Date: 12/19/2020 Disposition Time: 3:00 PM
 Inurnment Date: 12/22/2020 Click to View Re-Interment Jewelry: Glasses: Interment Order #: Need Stone Need Final Lettering

Lot Owner: Ethan Allen Probos Lot: 17 Section: GARDEN2 Mausoleum: Block: Grave: 1

Cause of Death: Stopped Breathing Autopsy?: Y Certifier: Dr. John J. Vornholt, 2345 Five Mile Road, Cincinnati, OH 45230, Work: 513-999-9997
 Removal by: E1 Digger A. O'Dell License # 6666A Body in Prep Room
 Director: License # Where is Body Now? Hospital

Registrar Name: New Registrar District #: 5000 Date Permit Issued: 11/26/2012 First Call Contact:

Figure 4 - Disposition Screen

The **Method of Disposition** will determine the headings of some of the items on this screen. When there is a cremation, the place, city & state and date of inurnment will appear. This disposition of the ashes may also be indicated. If an item seems inappropriate for the type of disposition, ignore it.

Re-interment information can be entered if needed.

Case Status is like your whiteboard – it gives you an overview of all upcoming cases and their status.

Created On	Deceased	Death Date	Disposition Authorized?	Place of Death	Removal by	Removal/Release	Informant
NOV 22, 2020 2:33 PM	Heatherwood Harold Quincy	JAN 14, 2021	Burial	Above at Bedford	Ralph Waldo Emerson	REMOVE COMPLETE Body in House	Mary Louise Gundry Home: 513-484-9729
NOV 13, 2020 8:08 PM	Patricia Haynes	JAN 18, 2021	Burial	Mount Vernon Health And Rehabilitation	Staff Not Assigned		David Park
NOV 13, 2020 8:00 PM	Kenneth William Souder	JAN 18, 2021	Cremation	Home	Digger O'Dell	REMOVAL REQUIRED- Body Released Awaiting Removal	Rose Souder
AUG 21, 2020 6:33 PM	Joseph Howard Beckel	JAN 18, 2021	Burial	Cincinnati Childrens Hospital Medical Ce	John Robert Dix	REMOVE COMPLETE Body in House	Margaret Beckel Home: 513-322-9747
JUN 2, 2020 3:30 PM	George Henry Kabis	JUN 1, 2020	Burial	Bad Samaritan Hospital	Staff Not Assigned		Irene Kasotis Home: 513-665-6665
SEP 26, 2019 9:12 AM	Robert David Probos	JAN 18, 2021	Burial	Roger Hemmerly Memorial Rest Home	Ralph Waldo Emerson	REMOVE COMPLETE Body in House	DO NOT RELEASE ANY INFORMATION TO ANYONE Georgia May Fookley Home: 760-381-9667 Work: 616-288-7668 Mobile: 818-985-7485

You can also see and print the status of upcoming services.

Created On	Deceased	Death Date	Disposition	Service Date	Service Time	Service Place	Wake Time	Visitation	Family Viewing	Limo Pickup Place	Limo Pickup Time
NOV 22, 2020 2:33 PM	Wainworth Harold Quincy	JAN 14, 2021	Burial	08/25/2015	1:00 AM	Ch of Jesus Christ of Latter Day Saints					
NOV 13, 2020 8:08 PM	Patricia Haynes	JAN 18, 2021	Burial	01/25/2021	11:00 AM	Joseph Sample Funeral Home					
NOV 13, 2020 6:00 PM	Kenneth William Souder	JAN 16, 2021	Cremation	01/20/2021	12:00 PM	Joseph Sample Funeral Home					
AUG 21, 2020 6:33 PM	Joseph Howard Beckel	JAN 18, 2021	Burial	01/21/2021	2:00 PM	Joseph Sample Funeral Home					
JUN 2, 2020 3:30 PM	George Henry Kasots	JUN 1, 2020	Burial	///							
SEP 26, 2019 9:12 AM	Robert David Proboas	JAN 18, 2021	Burial	01/21/2021	10:00 AM	Joseph Sample Funeral Home	Thursday, January 21 from 9:00 AM to 11:00 AM at	Wednesday, January 20 from 4:00 PM to 7:00 PM at Joseph P. Sample			

Flight Information can be entered for ship-in or ship-outs. A flight schedule can then be printed which can be given to the family or the attendant transporting the body. See Appendix D for detailed explanation.

Floral Tributes can be recorded with images of the flowers. A list can then be given to the family for acknowledgement purposes. See Appendix D for details.

A map locating the cemetery, with directions, can be shown and printed if the address of the cemetery is known.

The **Cause of Death** will usually be filled in by the physician who signs the death certificate. It could be omitted here. Clicking the Certifier Data button will allow you to enter or check all the data normally entered by the doctor. Check your funeral home policy for whether or not to fill this in.

The **Certifier** or physician can be chosen from a list of previously used doctors by clicking on the arrow next to the word Certifier. If the correct doctor is not on the list, right-click the arrow and you will be asked if you want to add a survivor record for the doctor. Answer yes, then fill in the doctor information. Fill in as much as you know, such as name, address and phone, because this will serve as the Rolodextm of doctor's names and addresses. When you click on quit/save, TerraPro will ask if you want to save the doctor to the list. Answer Yes, and next time the doctor will be on the list. To edit the doctor/clergy lists, choose Doctor/Clergy Lists from the Main Menu.

Registrar and First Call Contact is optional – this is the person who called the funeral home about the death, and is not necessarily the informant. Since most states use online death registration, the registrar data is stored there.

Embalmers and Funeral Directors and Removal Personnel are setup in advance when your system is setup. To edit them, right-click on the pull-down list arrow. *Remember that the code for a funeral director MUST start with F, embalmers E and Removers R, for them to show up on the pick lists. Then you will assign each staff member a consecutive number (F1, F2, F3 etc).*

**SERVICES
SCREEN**

This screen gives you information about the service and visitation as well as choosing the clergy and record other information about the service.

File Number 2015-004 **Robert David Probos** Maximize Screen

Vital Disposition **Service** Obituary Benefits I Benefits II-IV Flag Marker Marker II

Type of Ceremony: Graveside

Visitation Friday, December 11, 2020 from 3:00 PM-11:00 PM at Joseph P. Sample Funeral Home, Inc.
Graveside Saturday, December 12, 2020 from 2:00 PM-4:30 PM at Little Hope Baptist Cemetery
Burial Saturday, December 12, 2020 from 3:00 PM-6:00 PM at Little Hope Baptist Cemetery

Clergy: Pastor Rod L. Kincaid - Work: 440-536-8575
2nd Rev Horatio Robinson - Home: 513-555-6666 Work: 513-666-5555
3rd John Johannsen -

Church Affiliation: Our Lord Christ the King Church
Religion: Christian

Deliver Flowers: Date and Time:
 To Funeral Home 12/18/2020 01:00 PM
 To Other Location:

Casket: Woodlite State Silver - \$4850
Vault: Clark Custodian 10 Gauge STEEL, Painte

Comments: DO NOT RELEASE ANY INFORMATION TO ANYONE EXCEPT INFORMANT OR MOTHER OR FATHER
Mother needs help with stairs

Hobbies: Mr. Probos was also interested in his Garden Railway, Nature, and Technology

Memorials: Memorial Contributions may be made to Cincinnati Association for the Blind, 2045 Gilbert Avenue, Cincinnati, OH 45273-9798 Phone: 513-221-8558

Fraternal: Mr. Probos married his wife on September 15, 1956 and they lived happily until her untimely death on September 16, 1956.

Checklist Pre-Arranged? Pre-Paid? Indigent? Source: Walk In Symbols: Clear Symbols

Figure 5 – Services Screen

The **Type of Service** is required information: some forms may require knowing this, or you may wish to do a statistical analysis of the different types of services you provided within a given time frame. Choosing the Type will fill in the **Type of Ceremony** which indicates Mass of Christian Burial, Funeral Services, or some other type which could show up on a Memorial Folder or Mass Program.

The dates and times of services are shown here but **MUST BE EDITED FROM THE EVENTS CALENDAR**. To bring up the events calendar, right-click any date field or choose Events Calendar from the main menu:

Joseph P. Sample Funeral Home, Inc. Event Calendar

Event Calendar for Robert David Probos

Add Another Event Quit

Delete Event Help

Start Date/Time	End Date/Time	Event Type	Event Description (Click an Event to Edit)	Location
December 11, 2020 3:00 PM	December 11, 2020 11:00 PM	Visitation	Visitation Friday, December 11, 2020 from 3:00 PM-11:00 PM at Joseph P. Sample Funeral Home, Inc.	Joseph P. Sample Funeral Home, Inc. 6404 Coffey Street Cincinnati, OH
December 12, 2020 2:00 PM	December 12, 2020 4:30 PM	Graveside	Graveside Saturday, December 12, 2020 from 2:00 PM-4:30 PM at Little Hope Baptist Cemetery	Little Hope Baptist Cemetery 2222 Chickasaw Street Hope, KY
December 19, 2020 3:00 PM	December 19, 2020 6:00 PM	Burial	Burial Saturday, December 12, 2020 from 3:00 PM-6:00 PM at Little Hope Baptist Cemetery	Little Hope Baptist Cemetery 2222 Chickasaw Street Hope, KY

The **Events Calendar** allows you to enter detailed information about each event, such as Visitation, Service, Burial or other events you are responsible for scheduling. Click on the Help button for an overview and tips for using this screen. The clock makes it easy to enter start and stop times for events, after a date has been entered.

Make sure every event has a date, start and stop times, event type and location. The description of the event will be automatically entered for you.

The calendar at the upper left allows you to see your company calendar for scheduling purposes. If you use **Outlook Calendar or Google Calendar**, the event can be automatically copied to that calendar by clicking the button below the calendar icon.

You can edit the list of **types of events** by right-clicking the pull-down arrow, and you can edit **locations** or add new ones by right-clicking the pull-down arrow next to the location field.

Add as many events as needed for this case. When finished, click the Quit button, then click anywhere to update the Services information.

The **Church Affiliation** and **religion** are also optional. For Jewish funerals, if “Jewish” or “Judaism” is entered as the religion, additional inputs are visible to indicate choice available:

Rabbi:	<input type="text" value="Rabbi Bob Alper"/> Congregation Herb Alper - 4498 Sundance Highway - Pocono, PA	<input checked="" type="checkbox"/> Shomer?
2nd	<input type="text" value=""/>	<input type="checkbox"/> Tahara?
3rd	<input type="text" value=""/>	<input checked="" type="checkbox"/> Shiva Candle?
Congregation: <input type="text" value="Congregation Herb Alper"/>		<input type="checkbox"/> Tachrihim?
Religion: <input type="text" value="Jewish"/>		<input type="checkbox"/> Tallit?
		Hebrew Deathdate: 21 Tishri, 5772
<input type="button" value="Print Yahrzeit Calendar"/>		

The Hebrew death date is calculated, and a Yahrzeit Calendar may be printed for the next 50 years anniversary dates.

Muslim faith preparation rites information can also be gathered if the religion is indicated as Muslim:

Imam:	<input type="text" value="Imam Muhammad Ali Ben Sarik - Home: N/A Work: N/A"/>	<input type="checkbox"/> Ghusl (Bathing)
2nd	<input type="text" value="(none)"/>	<input checked="" type="checkbox"/> Enshrouding
3rd	<input type="text" value="(none)"/>	<input type="checkbox"/> Janazah Prayer
Mosque:	<input type="text" value="Residence"/>	
Religion:	<input type="text" value="Muslim"/>	

The **Casket and Vault** will be entered later on the bill, and then will show up here. You can type them in now if desired.

Checklist allows you to check off tasks as they are completed, avoiding duplication of effort, and assuring that nothing is missed. See appendix D for more details on customizing the checklist.

Comments allow you to provide notes about the case that others may need to properly serve the family. Right-click on comments, memorials or fraternal fields to enlarge them to full screen size for editing.

Memorials is used in case you want a separate place to record the wishes of the family for contributions. If you right-click on this field, it will enlarge to a text editing box. Pressing CTRL-M while on that box will bring up the list of Charities (which can then be edited) and choosing one will type the appropriate language into the text.

Fraternal is used to record fraternal organizations the deceased may have belonged to. If these are recorded in the Obituary, there is no need to re-state them here, unless you have a form that requires them to be separated. This field could also be used for custom information – ask TerraPro personnel how to use it for that.

Hobbies also can be used to record interests and other information about the deceased’s life.

Symbols can be indicated, and used on memorial merchandise or website entries.

O B I T U A R Y
S C R E E N

Obituaries and death notices vary widely in format from town to town. Larger city newspapers typically charge for death notices, but publish obituaries (longer stories usually with a picture and having general public interest) as news items. Smaller town newspapers usually do not charge for obituaries, and the line between a death notice and an obituary is less distinct.

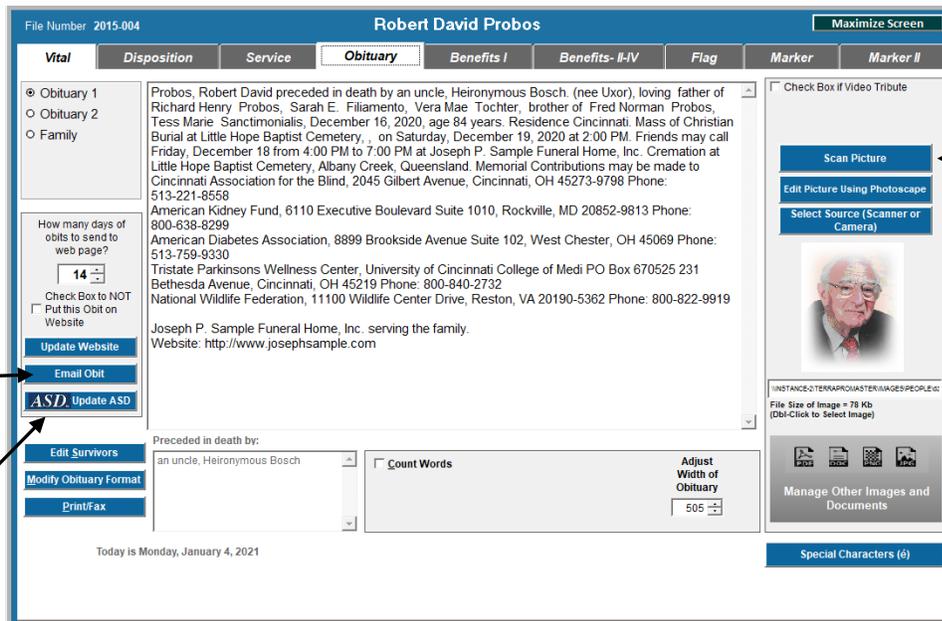
Since the obituary is one of the first items needing completion, we have given you complete freedom in the way you create it. You can type it yourself, composing it from the information gleaned from the family arrangement conference. You can also have TerraPro start to write it for you, based on the information you have entered. The more information you enter, the more complete will be the writing of the automatic obituary. Because of newspaper deadlines, you may not have the luxury of being able to enter all information first, so choose the way that works best for each case.

Let's suppose you have entered all the case information and wish to use the automatic obituary writer: Place the cursor on the empty Obituary text screen, and hold down the CTRL key and then tap the letter O (for Obit, naturally!) In a few seconds, TerraPro will compose the information in a narrative style and place it on the screen for editing. If you are not happy with what is presented, just edit it, or erase it and start over.

Some of the choices shown are optional add-ons. If you have an internet website, you can automatically add this obit and picture to websites we host or partner with.

You can also email the obit and picture directly from this screen to the newspaper or other email recipient.

Optional: TerraPro can link this data to ASD (Answering Service for Directors), and your website or our own WordPress sites to save you precious minutes re-typing data.



Scanning pictures has never been easier with our built-in EZ Twain™ scanning utility. Just place the picture on the scanner, push this button, crop as necessary and accept the picture. It will automatically be placed in the TerraPro Images /People folder so that all your network users can access the picture.

You can also Double-Click the filename box under the picture to assign an already scanned or emailed picture.

Figure 6 – Obituary

TerraPro allows you to store three different obituaries for each case. Click on the Obit1, Obit2 or Family buttons at the upper left, and you can create a long obit, a short death notice or a family listing quickly. When you choose to email the obit to the newspaper, first click Obit1, Obit2 or Family to select the obit you will be emailing.

The photo you scan can be edited to apply frames, fuzzy borders, color correction or hundreds of other artistic options by using a separate program such as Adobe Photoshop. A free program we recommend is called **PhotoScape** and is available by clicking the button to the right of the photo on the obituary page. Once installed, clicking the Edit Photo button will load **PhotoScape**

with the selected picture ready to edit. If desired, it can then be saved as a different name to preserve the original picture.

If you want to embed a link to the **Video Tribute**, you can copy and paste the link on this screen (upper left) or if you use a service, you may be given a tribute ID to enter. Call us for individual help on this topic.

There is a shortcut to the **Survivors Screen** here in case you need to check some information or enter more survivors.

You can adjust how the obituary is written by clicking on the **Modify Obituary Format** button. See Appendix D for information on how to use the “*Modify Obituary Format*” button.

The **Print/Fax** button will let you print or fax the death notice in a customized format. See TerraPro personnel for advice on how to customize this form, or read Chapter 10 if you would like to do it yourself.

Count Words gives you a word count and lets you estimate the cost of the death notice based on the number of words per line and the line charge from your local paper. This is an estimate only and may not reflect the actual charges incurred.

**TERRA PRO
DOCUMENT
MANAGEMENT** **Manage Other Images and Documents** is the door to a complete image and document tracking system for a particular case. It can be used to scan documents related to the case, such as military or legal documents which normally would be copied and placed in a file.



It is also the place where a slide-show tribute can be created for families who decline a DVD copy of a Tribute Video. Your large screen TV or monitor can show this slide show, broadcast wirelessly using a VGA broadcaster and receiver available from ioGear™ for around \$300. Optionally, a laptop or other networked computer near the big screen can connect directly to it. The tribute feature is an option, but is included to try out in all versions of TerraPro. Music can also be added to the tribute. The music files should be in mp3 format, and are placed in the TerraPro\Music folder. Any PDF document can be signed and emailed from this screen.

**BURIAL
BENEFITS
SCREEN**

These screens are only accessible if you have indicated they are needed on the first screen (Vital Statistics). See page 8 for a close-up of the bottom of this screen showing how to select these forms. Unless the deceased was a veteran, they will not be on the screen.

File Number 2015-004 Robert David Probos Maximize Screen

Vital Disposition Service Obituary **Benefits I** Benefits- II-IV Flag Marker Marker II

Department of Veterans Affairs
VA FORM 21P-530
APR, 2017

**APPLICATION FOR BURIAL BENEFITS
(Under 38 U.S.C. Chapter 23)**

1. FIRST, MIDDLE, LAST NAME OF DECEASED VETERAN Robert David Probos

2. SOCIAL SECURITY NUMBER OF VETERAN 123-45-6789

3. VA FILE 982989

8. RELATIONSHIP OF CLAIMANT TO DECEASED VETERAN

4. FIRST, MIDDLE, LAST NAME OF CLAIMANT

6. TELEPHONE NUMBER(S) (Include Area Code)
A. DAYTIME - - B. EVENING - -

7. E-MAIL ADDRESS OF CLAIMANT

5. MAILING ADDRESS OF CLAIMANT (Number and street or rural route, city or P.O., State and ZIP)

PART I - INFORMATION REGARDING VETERAN

9A. DATE OF BIRTH 02/21/1936 9B. PLACE OF BIRTH Green Camp OH

10A. DATE OF DEATH 12/16/2020 10B. PLACE OF DEATH Daytona Beach FL 10C. DATE OF BURIAL 12/19/2020 10D. WHERE DID DEATH OCCUR? Roger Hemmerly Memorial Rest Home

SERVICE INFORMATION (The following information should be furnished for the periods of the VETERAN'S ACTIVE SERVICE)

11A. ENTERED SERVICE DATE	PLACE	11B. SERVICE NUMBER	11C. SEPARATED FROM SERVICE DATE	PLACE	11D. GRADE, RANK OR RATING, ORGANIZATION AND BRANCH OF SERVICE
07/02/1964	San Francisco, CA	999999999	07/01/1967	San Diego, CA	WestPac 234
//			//		
//			//		

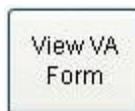
12. IF VETERAN SERVED UNDER NAME OTHER THAN THAT SHOWN IN ITEM 1, GIVE FULL NAME AND SERVICE RENDERED UNDER THAT NAME

CLICK BUTTON BELOW TO VIEW OFFICIAL VA FORM ON VA WEBSITE
View VA Form
File Online

Figure 7 - Burial Benefits Screen I

This screen is a close approximation of the actual VA form 21p-530 which is used to claim burial benefits from the Veterans Administration. Information you previously entered is automatically transferred to the veterans' forms from the case data previously entered. Anything that is missing can be filled in, or boxes checked as appropriate.

Claimant information can be typed in, or one of the survivors can be made the claimant by giving them a code "CF" in their other relationships. You can right-click to edit the claimant.



**VA FORMS
R U S :**

Whenever you see the above button, you can double-click it to bring up the actual VA form in Adobe Acrobat™ format from the VA website. If you do not have the Adobe Acrobat Reader, it is readily available for free download from Adobe's website, www.adobe.com.

Having an original, blank copy of each of the veteran's forms right here in TerraPro is an easy and convenient way of using it for reference, or to give to the family.

**BURIAL
BENEFITS II**

This screen allows you to enter the actual amounts due the claimant for parts II, III and IV.. See the actual VA instructions for details.

File Number 2015.004		Robert David Probos		Maximize Screen	
Vital	Disposition	Service	Obituary	Benefits I	Benefits- II-IV
<p align="center">PART II - CLAIM FOR BURIAL ALLOWANCE</p>					
13a. TYPE OF BURIAL ALLOWANCE REQUESTED (check one)			13b. WHERE DID THE VETERAN'S DEATH OCCUR?		
<input checked="" type="radio"/> NON-SERVICE-CONNECTED DEATH <input type="radio"/> SERVICE-CONNECTED DEATH <input type="radio"/> VA MEDICAL CENTER DEATH			<input type="radio"/> VA MEDICAL CENTER <input type="radio"/> NURSING HOME UNDER VA CONTRACT <input type="radio"/> STATE VETERANS HOME (If other, Specify):		
14. IF YOU ARE THE DECEASED VETERAN'S SPOUSE, DID YOU PREVIOUSLY RECEIVE A VA BURIAL ALLOWANCE? <input type="radio"/> Yes <input checked="" type="radio"/> No					
15A. DID YOU INCUR EXPENSES FOR THE VETERAN'S BURIAL? <input type="radio"/> Yes <input checked="" type="radio"/> No					
15B. ARE YOU SEEKING BURIAL BENEFITS FOR THE UNCLAIMED REMAINS OF A VETERAN? <input type="radio"/> Yes <input checked="" type="radio"/> No					
<p align="center">PART IV - CLAIM FOR PLOT OR INTERMENT ALLOWANCE</p>					
17A. DID YOU INCUR EXPENSES FOR THE VETERAN'S PLOT OR INTERMENT? <input type="radio"/> Yes <input checked="" type="radio"/> No			17c. WAS VETERAN BURIED IN A STATE VETERANS CEMETERY? <input type="radio"/> Yes <input checked="" type="radio"/> No		
17b. WAS VETERAN BURIED IN A NATIONAL CEMETERY OR ONE OWNED BY THE FEDERAL GOVERNMENT? <input type="radio"/> Yes <input checked="" type="radio"/> No			18A. DID A FEDERAL/STATE GOVERNMENT OR THE VETERAN'S EMPLOYER CONTRIBUTE TO THE BURIAL? <input type="radio"/> Yes <input checked="" type="radio"/> No		
<p align="center">PART V - CLAIM FOR TRANSPORTATION REIMBURSEMENT</p>					
19. EXPENSES INCURRED FOR THE TRANSPORTATION OF THE VETERAN'S REMAINS FROM THE PLACE OF DEATH TO THE FINAL RESTING PLACE (Attach itemized receipts)					
<div style="border: 1px solid black; height: 20px; width: 100%;"></div>					
VA FORM 21P-530 Revised APR 2017					

Figure 8 - Burial Benefits II

You can download the latest versions of all veterans forms at the VA website, <http://www.va.gov>

Keep in mind that the Benefits I and II print on the front and back of the VA Application for Burial Benefits Form 21p-530. You will print these forms from the Print Forms dialogue. If you set your printer to duplex printing, the form will print front and back on the same sheet of paper.

FLAG SCREEN

The most commonly used Veteran's Benefit is a US Flag for draping the casket and presentation to the survivors. Make sure the survivor that is to receive the flag has an "FL" code in their other relationships, then proceed to the flag form:

The screenshot shows the VA Flag Form for Robert David Probos. The form is titled "APPLICATION FOR UNITED STATES FLAG FOR BURIAL PURPOSES" and includes the following fields and data:

- 1. LAST NAME, FIRST NAME, MIDDLE NAME OF DECEASED: Probos, Robert, David
- 2. BRANCH OF SERVICE (Check box): ARMY, NAVY (checked), AIR FORCE, MARINE CORPS, COAST GUARD, OTHER (Specify)
- 3. VETERAN'S SERVICE (Check box): World War II, Persian Gulf, Afghanistan, Iraq (checked), Korea, Vietnam (checked), Other (specify)
- 4. CONDITION UNDER WHICH VETERAN WAS RELEASED FROM SERVICE (Check box): A. VETERAN OF A WAR, MEXICAN BORDER SERVICE, OR OF SERVICE AFTER 1-31-55, DISCHARGED OR RELEASED FROM ACTIVE DUTY UNDER CONDITIONS OTHER THAN DISHONORABLE (checked); B. DISCHARGED FROM OR RELEASED FROM ACTIVE DUTY IN U.S. ARMED FORCES UNDER CONDITIONS OTHER THAN DISHONORABLE, AFTER HAVING SERVED AT LEAST ONE; C. BY DEATH IN ACTIVE SERVICE AFTER MAY 27, 1941, AND FLAG NOT FURNISHED BY SERVICE DEPARTMENT; D. SEPARATED FROM PHILIPPINE MILITARY FORCES, UNDER CONDITIONS OTHER THAN DISHONORABLE, AFTER SERVING WITH THE UNITED STATES IN SUCH FORCES UNDER THE PRESIDENT'S ORDER OF JULY 26, 1941, AND DIED ON OR AFTER APRIL 25, 1951
- 5. NAME OF PERSON ENTITLED TO RECEIVE FLAG: Georgia May Foolery
- 6. ADDRESS OF PERSON ENTITLED TO RECEIVE FLAG: 1076 East Church St, Marion, OH 43302
- 7. RELATIONSHIP TO DECEASED: SP Spouse
- 8. VA FILE NUMBER: 982989
- 9. SOCIAL SECURITY NUMBER: 123-45-6789
- 11. DATE OF ENLISTMENT: 07/02/1964
- 12. DATE OF DISCHARGE: 07/01/1967
- 7A. DATE OF BIRTH: 02/21/1936
- 10. SERVICE SERIAL NUMBER: 99999999
- 8A. DATE OF DEATH: 12/16/2020
- 15. DATE OF BURIAL: 12/19/2020
- 16. PLACE OF BURIAL (Name of cemetery, city, state): Albany Creek, Queensland
- 17. REMARKS: (empty)
- 19. ADDRESS OF APPLICANT: (empty)
- Funeral Director: (checked)

Figure 9 - VA Flag Form

You will need to indicate the relationship of the recipient to the deceased. If you have entered the FL code as Other Relationship on that survivor screen, the address will fill in from that record.

HINT: When entering informant or other close relatives, add the FL code at that time to save time on this screen.

Free Government Markers are available from the VA. Filling out this form will let you apply for one:

File Number 2015-004		Robert David Probos				Maximize Screen
Vital		<i>Disposition</i>	<i>Service</i>	<i>Obituary</i>	<i>Benefits I</i>	<i>Benefits- II-IV</i>
		<i>Flag</i>	Marker		<i>Marker II</i>	
		View VA Form Online		IMPORTANT: Please read the General Information Sheet before completing this form. Type or print clearly all information except for signatures. Illegible printing could result in headstones or marker or delivery. BLOCKS OUTLINED IN BOLD are optional inscription items. Unless indicated otherwise, all other blocks must be completed.		
MILITARY DISCHARGE DOCUMENTS OR RELATED SERVICE INFORMATION IS REQUIRED.						
2. NAME OF DECEASED TO BE INSCRIBED ON HEADSTONE OR MARKER (NO NICKNAMES OR TITLES PERMITTED)					3. GRAVE IS:	
FIRST (or Initial)	MIDDLE (Or Initial)	LAST		<input type="checkbox"/> CURRENTLY MARKED		
Ethan	Allen	Probos				
VETERAN'S SERVICE AND IDENTIFYING INFORMATION (Use numbers only, e.g. 05-15-41)						
NOTE: Failure to complete Item 4 will delay processing.						
8. SOCIAL SECURITY NO.		SERVICE NO.		11A. DATE(S) ENTERED		11B. DATE(S) SEPARATED
123-45-6789		999999999		1st Service Entry Date 07/02/1964		1st Service Exit Date 07/01/1967
4A. DATE OF BIRTH		4B. DATE OF DEATH		2nd Service Entry Date / /		2nd Service Exit Date / /
		1945 2010				
12. HIGHEST RANK (No pay grades)				13. BRANCH OF SERVICE		
Lt. Commander				<input type="radio"/> ARMY <input type="radio"/> NAVY <input type="radio"/> MARINE CORPS <input type="radio"/> COAST GUARD <input type="radio"/> AIR FORCE <input type="radio"/> ARMY AIR FORCES <input type="radio"/> MERCHANT MARINE <input type="radio"/> OTHER (Specify)		
14. VALOR OR PURPLE HEART (Documentation must be provided)				16. WAR SERVICE (Check applicable box(es))		
<input type="checkbox"/> Congres. Medal /Honor <input type="checkbox"/> Distinguished Svc Cross <input type="checkbox"/> Bronze Star <input type="checkbox"/> Navy Cross <input type="checkbox"/> Air Force Cross <input type="checkbox"/> Silver Star <input type="checkbox"/> Purple Heart				<input type="checkbox"/> World War II <input type="checkbox"/> Persian Gulf <input type="checkbox"/> Afghanistan <input checked="" type="checkbox"/> Iraq <input type="checkbox"/> Korea <input type="checkbox"/> Other (specify) <input checked="" type="checkbox"/> Vietnam		
15. TYPE OF HEADSTONE OR MARKER REQUESTED				17. DESIRED RELIGIOUS EMBLEM		OPTIONAL: MEDALLION SIZE (FORM VA40-1330M)
<input type="checkbox"/> FLAT BRONZE <input checked="" type="checkbox"/> FLAT GRANITE <input type="checkbox"/> UPRIGHT MARBLE <input type="checkbox"/> SMALL FLAT GRANITE <input type="checkbox"/> FLAT MARBLE <input type="checkbox"/> BRONZE NICHE <input type="checkbox"/> UPRIGHT GRANITE				<input checked="" type="checkbox"/> Christian Cross EMBLEM NUMBER: <input type="checkbox"/> NONE 01		<input type="radio"/> 5 inch <input type="radio"/> 3 inch <input type="radio"/> None <input type="radio"/> 1.5 inch
VA FORM 40-1330 DEC 2017						
APPLICATION FOR STANDARD GOVERNMENT HEADSTONE OR MARKER						

Figure 10 - VA Marker Application I

Again, any information entered on any veteran's form carries to the other forms. Fill in data as needed, check any appropriate boxes and continue to the second Marker Screen:

Using the Right-hand Mouse Button

Your mouse has two or more buttons. You paid for them, why not use them all?

If you've read the previous chapter, you probably are getting the idea about the right-hand mouse button. If you press it at certain spots in TerraPro, it gives you access to editing information related to the spot you pressed it. For example, right-clicking on the informant's name on the Vital Statistics screen will bring up the Survivor's screen, where you can change information, track After Care, or write letters.

Let's explore other uses for this button!

First of all, when you pass the mouse over certain parts of the data entry screens, TerraPro will provide tips about how to enter data, or let you know you can right-click to "drill-down" to more information.



Let's do it!

From the Vital Statistics Screen, move the mouse to the name of the informant. Click the right-hand mouse button. The survivors (or people) screen will pop up. For now, close it using the red X or the Save and Quit button.

DIFFERENT CLICKS FOR DIFFERENT TRICKS

Another way to use the right-hand mouse button is to maintain your lists which pop-up from the pull-down buttons. For example, the cemetery locations pull-down button on the Disposition tab allows you to make changes to the details about each cemetery.

On the Service tab, you can edit Places of service by right clicking on the pull-down for place of service, and edit the list of churches by right clicking on the pull-down for churches. In fact, at any point where prompted by the tips, you can right click to do more with the data. If you happen to right click where not prompted, no harm is done.

Editing Locations

Now that you know how to get to the locations editing screen by right-clicking on certain pull-down lists, let's find out how to make changes to our locations list.



What are Locations?

Locations are defined as facilities where death occurred, churches and other places for services to be held, cemeteries or crematories and so on.



Let's do it!

As with other editing in TerraPro, you get behind the scenes for data lists by right-clicking on the appropriate pull-down list. If not already editing a case, click Edit Current Case (1) on the Main TerraPro Screen menu. Click on the Service tab (2), then right-click on the Church Affiliation Arrow (3):

The screenshot shows the TerraPro software interface for editing a case. The left sidebar contains a menu with 'Edit Current Case' highlighted by callout 1. The main window is titled 'Robert David Probos' and has the 'Service' tab selected by callout 2. Within the 'Service' tab, the 'Church Affiliation' dropdown menu is highlighted by callout 3. The interface includes various fields for service details, such as 'Type of Ceremony', 'Clergy', 'Deliver Flowers', and 'Casket'. The bottom section contains checkboxes for 'Pre-Arranged?', 'Pre-Paid?', and 'Indigent?', along with a 'Clear Symbols' button.

Figure 12 - Getting to the locations editing screen via right-click on a location pull-down list

**LOCATION
EDITING
SCREEN**

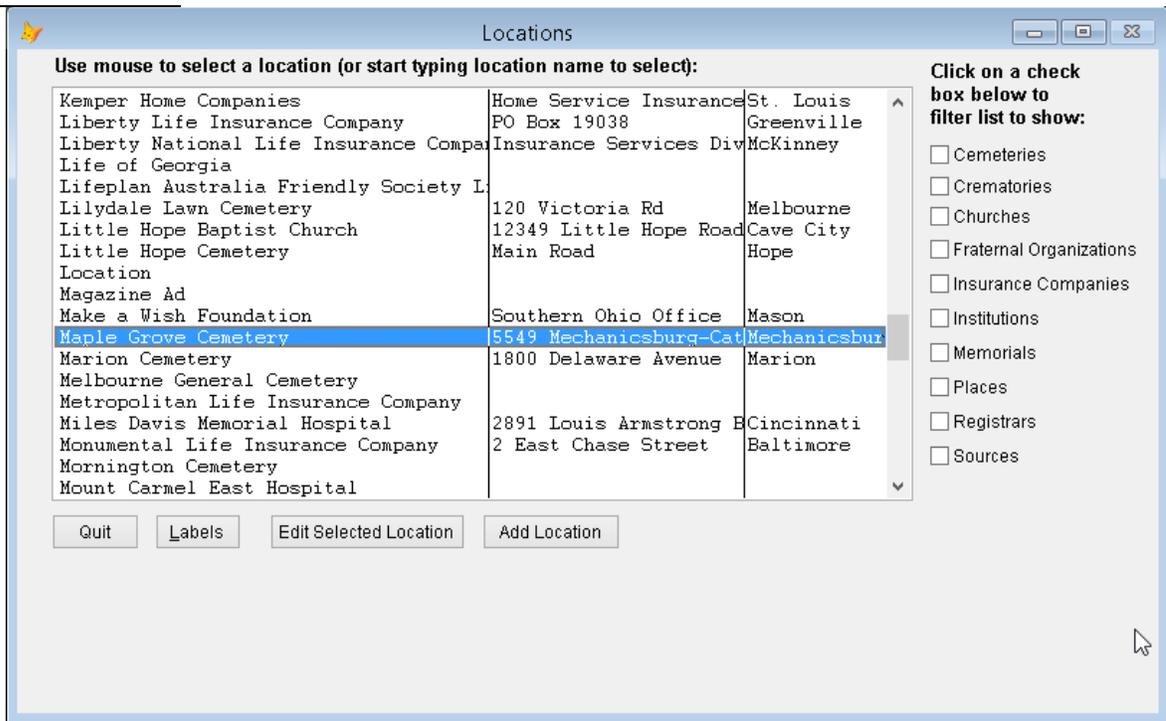


Figure 13 - Location Editing Main Screen

When first entering the locations editing screen, the list shows ALL locations. If you want to edit just Places of Service, check the box next to the word Places by clicking on it. Now you see just the locations coded as PLACE:

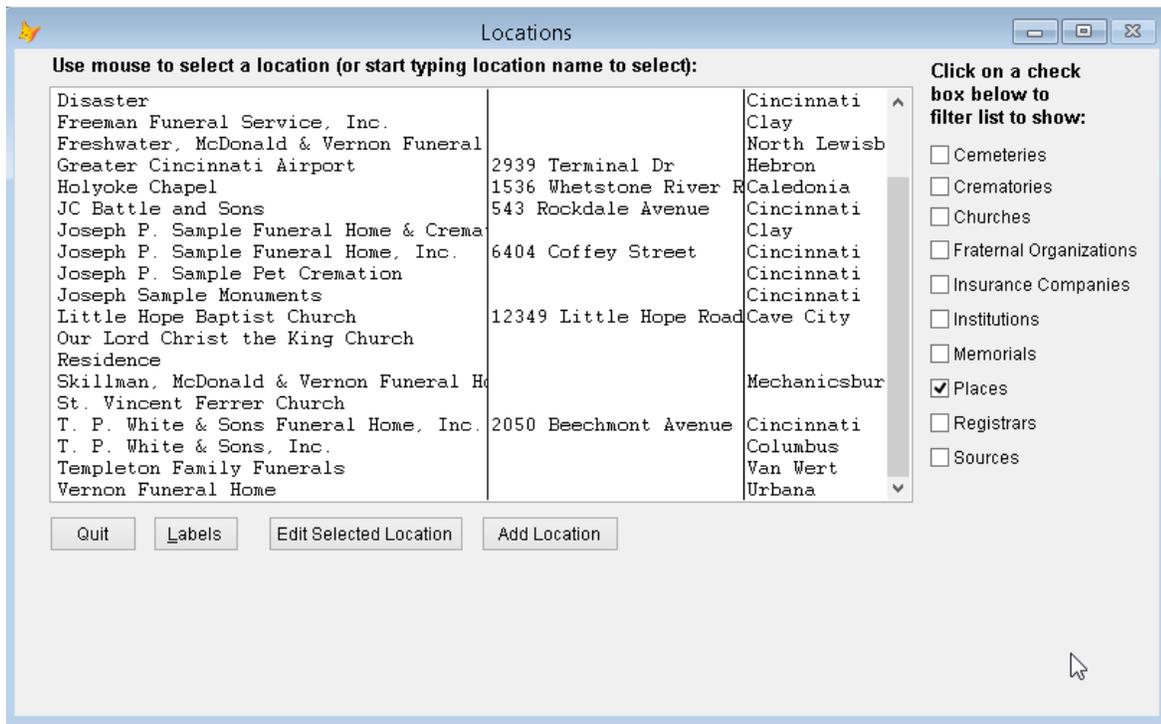


Figure 14 - Locations Editing Main Screen Filtered for Places only

You might see a lot of churches listed. These are the entries coded as Place of Service when the church is where the service is held. These same churches might appear on the Churches list separately, so be sure you make any changes under both entries.

To edit the data for any location, highlight the desired location by single clicking on it, or find it in the list by starting to type its name. As you type, the list will move to the letters typed. (If you are a slow typist, the list may jump around. Try typing the first two letters quickly to get near the right entry, then use the arrow keys to move up or down to the right entry.) Click on Edit, and the editing screen will appear:

Figure 15 - Editing details about locations

Make the changes as needed. Notice the upper right part of this screen has a pull-down list that allows you to decide which pull-down list this location will appear on. Right now, it says PLACE, but you could change that to another list. Click on Save to save your changes, or Revert if you don't want to save your changes.

Note: You may see the same location on your list two or three times. This is because it is there under PLACE and CHURCH. That way, when you pull-down a list at the Churches selection, it will be listed as well as under the PLACE of service. If it listed under PLACE twice, then one may safely be deleted.

You can print labels for all locations (memorials, places of service, cemeteries, institutions and churches) from the Figure 15 screen also. Just filter for the type of location by clicking one of the filter check boxes, then click on Labels – you can preview them first to assure all addresses are complete.

Figure 16 - Editing Screen after saving

After saving, you have many choices:

Top – Go to the first entry alphabetically.

Prev – Go to the entry alphabetically before the one displayed.

Next – Go to the entry alphabetically after the one displayed.

Bottom – Go to the the last entry alphabetically.

Find – Brings up a dialogue box that lets you search for the location by any of the fields listed.

Print – Print a Rolodex™ Card for this entry.

Add – Make a new entry (in any category – Place, Church, Cemetery, etc)

Edit – Make changes to this entry

Delete – Delete this entry (you will be prompted to confirm delete)

Exit – Leave the editing screen, return to the locations main editing screen.

Editing Survivors

TerraPro uses the term “Survivors” rather loosely. It refers really to “People”, living or dead, related to the deceased or not, but sharing the common property of being a part of the case information for this deceased.

You can get to the survivor-editing screen by right clicking on the informant’s name, or by clicking Edit Survivors on the Obituary screen. You can also get there by right clicking on the pull-down arrow for the clergy or doctor pull-down list or the father or mother’s name. In other words, wherever a survivor is referenced on the main editing screens, you can “drill-down” to the survivor-editing screen by using the right hand mouse button.

Survivors File for Robert David Probos - Case # 2011-501- Died June 30, 2015

Foolery, Georgia <-CHOOSE ANOTHER PERSON Refresh List

Spouse Information | Post Service Followup | Letters | Labels/Cards | Texting Center

Relationship to Deceased: SP Other Relationships (use 2 letter codes) IN-PR- - - - - Insurance Policies

Title: Georgia First: May Middle: Foolery Last: AKA: Sex:

Salutation: Date Married: // Marriage Info: memo

Maillist Codes: List with Survivors Deceased

P.O. Box/Apt: Street & #: 1076 East Church St

City: Marion OH ZIP: 43302

County: Twp: Inside City? Arrangements Conference Date/Time: 10/04/2012 12:00 AM

How Contacted: Evening or Home Phone: 740-383-9657 Daytime or Work Phone: FAX: Cell Phone:

E-mail: Birthdate: // SSN: --

Browse/Add New Delete Google Map Previous Next Save & Quit

When adding NEW records, fill in City, State & ZIP Automatically

Figure 17 - Survivor's Screen

An important part of this screen has to do with defining the relationship(s) of the survivor to the deceased. TerraPro uses two letter codes to define relations. Most of the codes use the first two letters of the relationship. For example, FA-Father, MO-Mother, DA-Daughter, SO-Son, UN-Uncle, AU-Aunt, etc. Where not obvious what the relationship is, use the pull-down list to choose. If the relationship is not listed, use the right hand mouse button to edit the list. Once in the list, press CTRL-Y (hold down the CTRL key and then tap the Y key). Enter the new relationship and code, and then under male and female, enter the relation if the deceased is male or female.

The other relationships this person has are also important. It is possible for one person to have many relationships to the deceased and many duties to perform. For example, the Spouse could also be the informant, person responsible for the bill, flag recipient, marker claimant, etc. In order for TerraPro to know who has these responsibilities, you MUST enter the other relationship codes into the other relations’ field. There is room for up to seven codes, each separated by a space. If

your cursor is not properly placed it is possible that using the pull-down list will cause a code to be divided over the preset spaces in the field. Make sure each relationship has two characters. If entering codes manually, the space is automatically entered for you, do not use the space bar in that field.

**QUICK ENTRY
OF FAMILY
MEMBERS**

The button labeled Browse/Add can be used for quick, spreadsheet-style entry of family members. It will be necessary for you to know the family relationship codes before you start entering family members, as there is no pull-down available during entry. You should also remember to mark the members as family by putting a T in the “List with Survivors?” column.

Later, when creating an Obituary or Family List, CTRL-L will build a list of relations, names and cities for those survivors marked as family members.

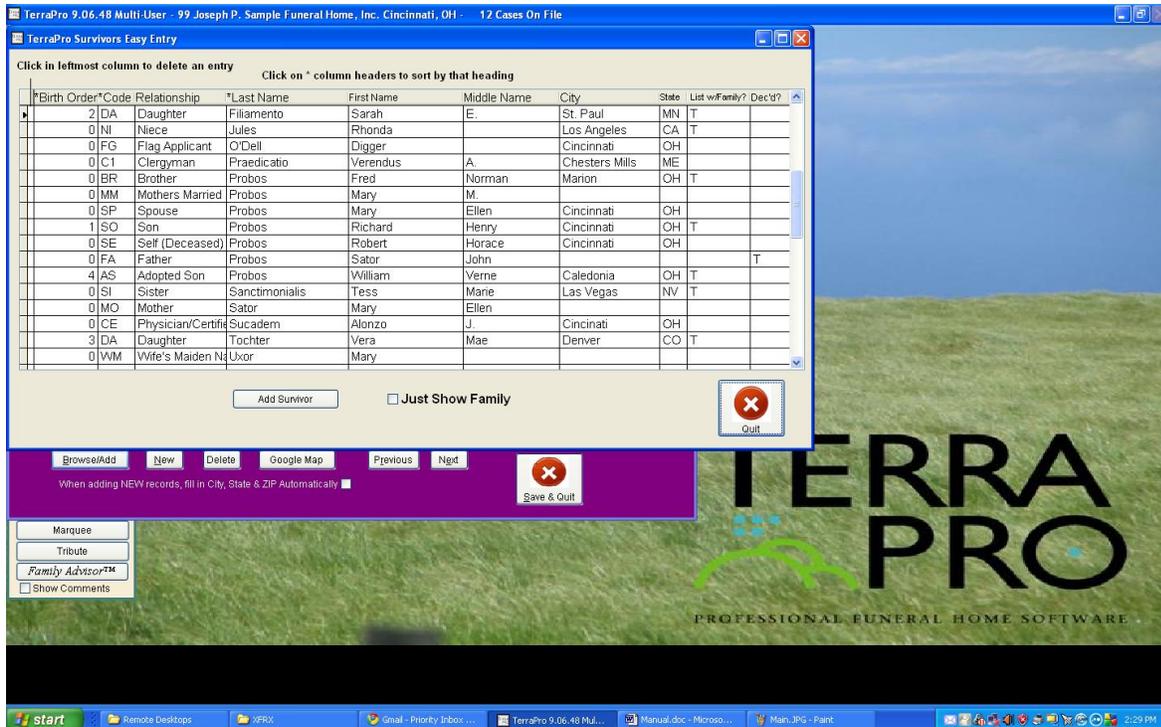


Figure 18 - Browse/Add Survivors Quick Family Member Entry Screen

AFTERCARE LETTERS

See Chapter 6, AfterCare, for details about using the built-in Post Service Follow-up system in TerraPro.

TEXTING

If you enter a cell phone number for any survivor, you can text directly from TerraPro and hear back from them. This gives you a record within the case file of any texts sent to the survivor.

Printing Forms

After data is entered that appears on a form, you can print the form. This chapter tells how to print forms.

From the main TerraPro screen, select Forms by clicking on the button labeled forms.

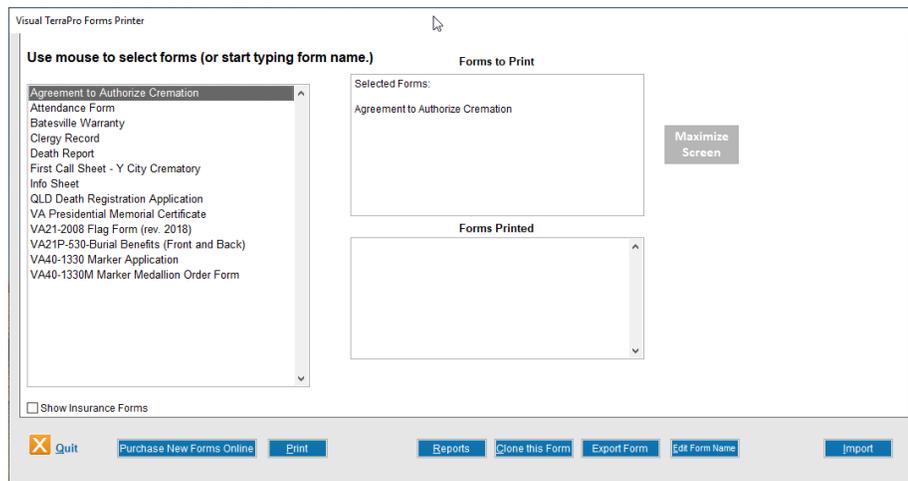


Figure 19 - Form Selection

Your list of forms may look different than the one above, because this list can be fully customized to add or modify forms to fit your exact needs.

As indicated on the screen, you can **click on a form name** to select it for printing. When you do, its name appears on the right hand side of the screen under the list of selected forms. You can **add as many forms to the list** as you like. When you are ready to print, TerraPro will pause between each form to assure that you are ready with the appropriate paper in your printer.

When you click on the Print button you will be asked if you are ready to print. Then you have five choices:



Yes – Go ahead and print – Printer is ready with paper.

Preview – Look at the form on the screen first to check for errors

Skip – Oops, I selected this one by mistake, let's skip over it

Modify – Change the way the form looks. This requires some knowledge of the FoxPro Report Designer. Although not terribly difficult to use, you may want to read chapter 9, Modifying reports and cards, before attempting to modify your own reports. TerraPro personnel are more than happy to make modifications for you at a reasonable cost, so give us a call and let us know what you are planning.

Create Webpage – Any form you can print can be made into a web page. This might be useful for creating online price lists, memorial folders, or other pages.

Optional Output – Any form can be made into a PDF, Word Document, Excel Spreadsheet or an image file (jpg). Check the output you wish and click on Print. If you choose PDF, you will be asked for the title of the PDF and where to save it (We recommend the PDF folder). Next you will be asked if the document should be added to your documents database (accessible from the obituary screen)

After printing, you are returned to the form selection screen. Notice that the date and time and name of the form have been added to the list of forms printed. You can edit this list to remind yourself of tasks that need completed.

Other choices are available from the Forms screen:

Clone this form – Although cloning humans is not a good idea, cloning your forms can allow you to make modifications in a form without harming the original copy. Clone means make an exact copy.

Purchase New Forms Online – This takes you to the TerraPro Store on the Internet where you can order special forms.

Edit Form Name – Change the name of the form, or add FoxPro commands that gather data or summarize information for the form. You should do this ONLY under guidance from a TerraPro representative, unless you are comfortable using the FoxPro command language.

Quit – return to main TerraPro screen.

Print – discussed above.

Export Forms – Copy a form to a floppy disk for modification by TerraPro personnel.

Import – Copy form from floppy disk after modification by TerraPro personnel.

CardShop

Using TerraPro's CardShop makes printing memorial merchandise a snap. Pictures and verses can be changed to customize your folders and prayer cards to meet your family's requests.

Choose CardShop on the TerraPro main screen menu by clicking on the button labeled CardShop.



Figure 20 - Opening CardShop presents you with this screen

CHOOSE CARD The first thing you must do when starting CardShop is to choose a card to print. Click on the arrow at the end of the box labeled Choose Card: and you will see a list of the cards or other memorial merchandise that have been setup for you by TerraPro personnel. These are grouped as Acknowledgement Cards, Memorial Folders, Prayer Cards and Register Book. Other types of printed memorials may also be listed, depending on your needs.

Once you have chosen a card, the following screen will appear:

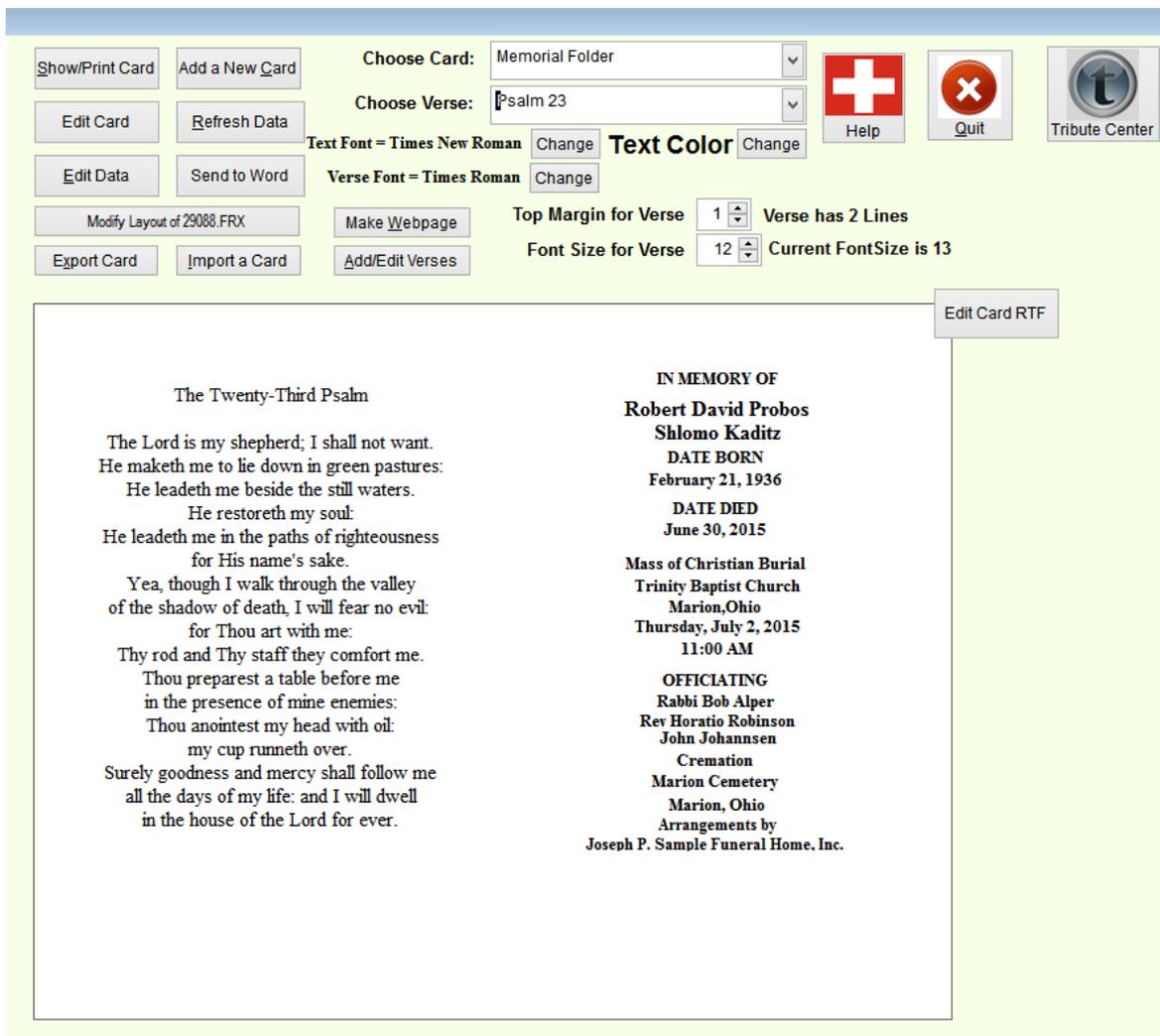


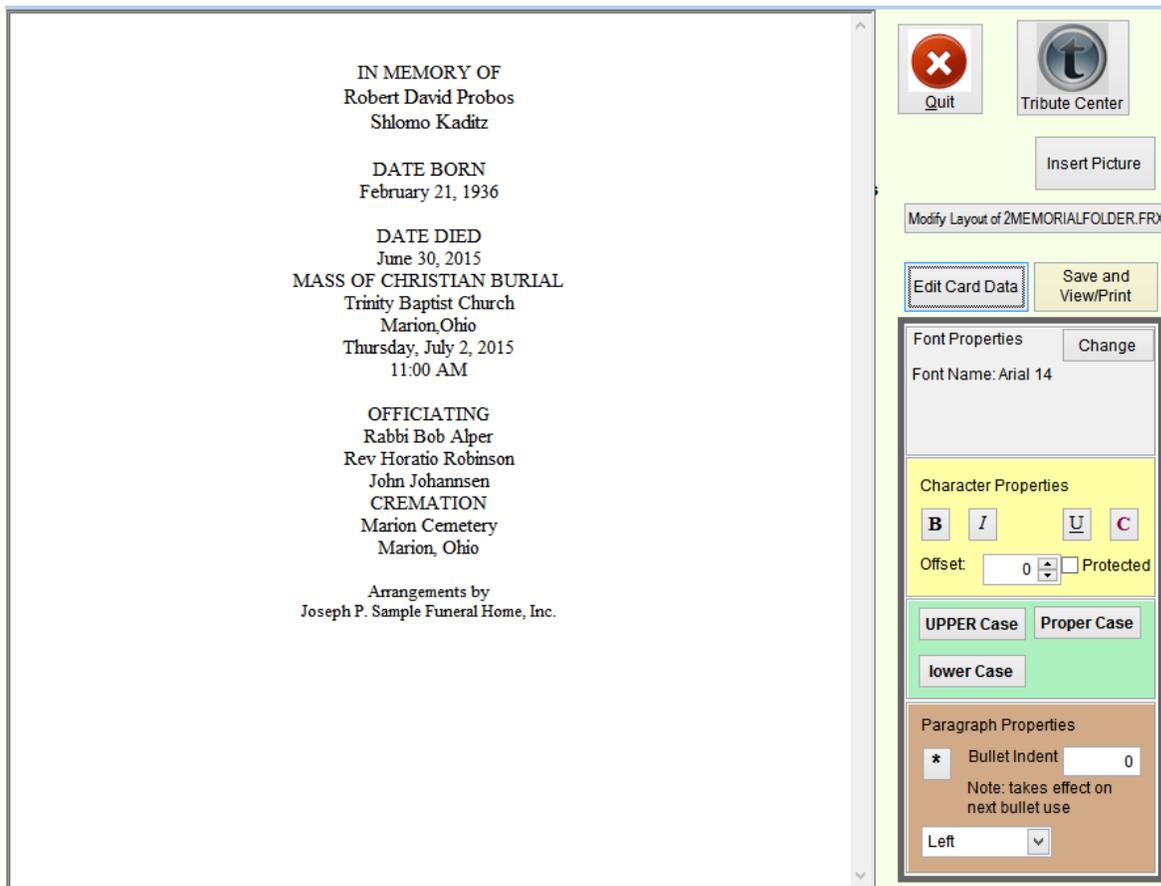
Figure 21 - After choosing a card, these buttons appear and the card information can be edited.

If the card looks good, just click the Show/Print Card in the top left corner of the screen and print on your card stock. (See item

If you need to change the data, you can type over it on the screen, or use the Edit Card RTF option:

EDIT CARD
RTF

The layout of the card can be changed, along with new data and font changes. Click on the Edit Card RTF button and you will see the following screen:



Just like in a word processor such as Microsoft Word™, you can use your mouse to highlight certain areas of the text and change the font properties. The buttons on the Font Properties window will act on the highlighted text only.

If you need to change the layout drastically, we suggest consulting a detailed explanation of the FoxPro report generator as it pertains to the CardShop. A little learning here can help you create almost any card, page or folder you like. The method is described in Appendix D.

EDIT CARD (Press the button labeled “*Edit Card*”, if you do not see a screen similar to the one above.)

The information on the card can be edited on the screen. For example, the location of the Funeral Service is Trinity Baptist Church, but the city and state are missing. You can type them in on this screen. *(due to centering issues, when clicking on a line, the line may disappear, just press the TAB key and you will be at the beginning of the line)*

The headers (such as DATE BORN, DATE DIED, etc) can also be changed. If you have been using TerraPro for a while, you may require a little help from TerraPro personnel to change the layout of your cards to enable this feature. The method is described in Appendix D.

SHOW CARD

Press the button labeled Show Card, and you might see this:

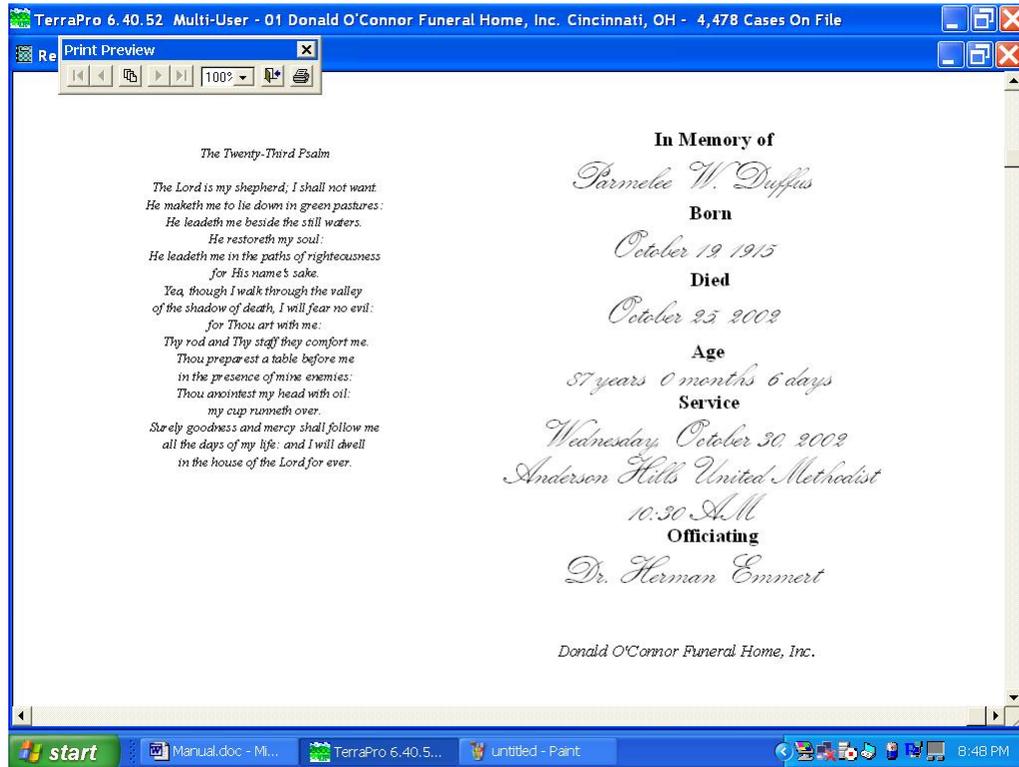
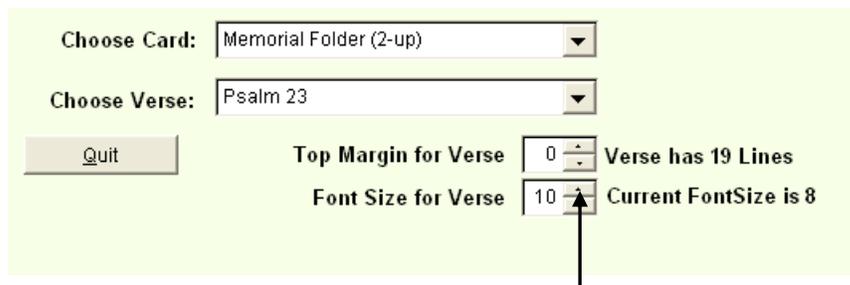
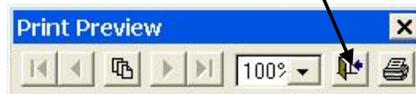


Figure 22 - Show Card brings up a preview of the card with print option (in this case, data is different to show unlimited combinations of fonts and styles)

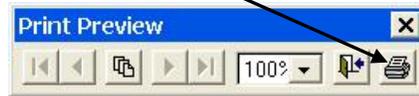
This looks pretty good, but the verse is a little small, and not centered vertically very well. Let's close this up using the print dialogue box exit button: (We call it "going out the exit door.")



ADJUST CARD

Since the verse font size (the size of the printing) was a little small, we will adjust it from 8 points to 10 points. Either type 10 in the Font Size for Verse box, or click on the up arrows to increase the font size. (This type of control is called a spinner, and is handy when using the mouse to change the value of the object.)

Preview the card again by clicking on Show Card. If it looks good, you can go ahead and print using the Print Preview box Printer Icon.



PRINT CARDS

If needed, you can adjust the font size further, or adjust the top margin until you are happy with the position and size of the verse. Print one copy of the card to assure everything looks good in print, then make any other adjustments you like, and then use the print dialogue to print as many cards as needed:

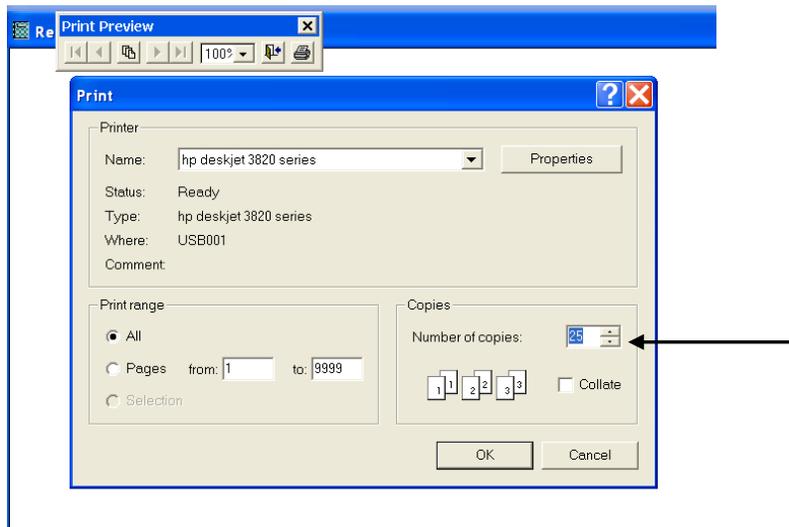


Figure 23 - Print Dialogue Box

EDIT DATA

Sometimes the card looks good, but the data which prints is wrong. You can edit the data on the screen or by using the Edit Data button. If you press it, the Data Editing box shows up:

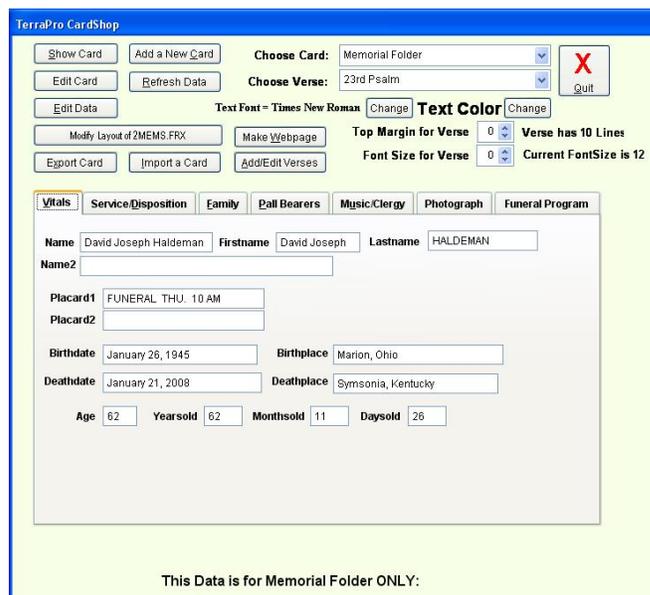


Figure 24 - Clicking on the Edit Data Button allows changing the data appearing on each card

There are seven tabs on the data editing screen to allow you to change almost any data which might appear on the various cards. *Some data does not apply to a given card; for example when printing the Memorial Folder, there is no need to enter Family data, as it does not appear on a Memorial Folder.* A reminder appears at the bottom of the screen to let you know that this data will be saved with this card, but changes will not appear on other cards.

Although the data shown is copied from the case data you entered originally, *changes made here will not be reflected on the case data.* This allows you to make changes for the cards (like nicknames, etc.) which would not be appropriate for death certificates and other government documents.

**VITAL
STATISTICS**

Think of the data items you are editing as building blocks for constructing the various cards you are printing. The first and last names can be printed separately if needed, or the birthdate can be shown as October 19, 1915 instead of all numbers 10/19/1915 as originally entered. At some point, you may want to read Chapter Ten to learn how to modify cards to customize them. When you do you will be referred to these screens to discover the data items which will be placed on cards.

**SERVICE /
DISPOSITION**

Figure 25 - Service and Disposition Editing

Why so many Ceremony fields? If there are multiple services in other towns, there may be a need for them. Otherwise, they can be used for other information not gathered by the program. In other words, just because data is labeled Ceremony4 doesn't mean it HAS to contain information about the 4th ceremony. If you never use 4 ceremonies, that data spot can be used for something else.

Why is the cemetery state blank? If you have been using TerraPro for a long time, you may be aware that cemetery locations used to be stored with the city and state in the same field (like the example above where it says Union Twp, Ohio). Newer versions of TerraPro store the state in a separate field, and would have filled in the state. New users won't have to edit their location

lists to move the state out of the city field and into the state field, but older users may want to make this change. See index entry under *Locations* for more details on how to do this.

The field called Lot contains information about the cemetery section , lot and grave. This will probably need some editing if certain terms do not apply.

FAMILY

TerraPro CardShop

Choose Card: Register Book 3 - Family Record

Text Font = Times New Roman

Text Color

Vitals
Service/Disposition
Family
Pall Bearers
Music/Clergy
Photograph
Funeral Program

Spouse	Karen Sue Haldeman	Father	Walter Clifton Haldeman
<input type="checkbox"/> Enter family using memo		Mother	Trella Frances Hemmerly
Children1	Sarah Sapp		
Children2	Josh Haldeman		
Children3	Jed Haldeman		
Children4	Susannah Haldeman		
Children5			
Children6			
Children7			
Children8			
Children9			
Children10			

This Data is for Register Book 3 - Family Record ONLY:

Figure 26 - Family Data Entry

Family data is usually used for the Family Record Page of the Register Book, so the card selected has been changed to that page.

TerraPro CardShop

Choose Card: Register Book 3 - Family Record

Text Font = Times New Roman

Text Color

Vitals
Service/Disposition
Family
Pall Bearers
Music/Clergy
Photograph
Funeral Program

Spouse	Karen Sue Haldeman	Father	Walter Clifton Haldeman
<input checked="" type="checkbox"/> Enter family using separate lines		Mother	Trella Frances Hemmerly
Haldeman, David Joseph his father, Walter Haldeman and his uncle, Harold W. Rockwell and his step-father Ray Romine , beloved husband of Karen Sue Haldeman, (nee Metster), loving father of Jedediah Thaddeus Haldeman, Benjamin Jacob Haldeman, Sarah Hilary Sapp, Joshua Joseph (Flavia) Haldeman, Susannah Elizabeth M. Haldeman, brother of Kathi Haldeman Sands, grandfather of Thaddeus David Sapp, Crystal Shanda Lear, Dee Lori Ann Haldeman great-grandfather of 3 April 1, 2008, Age 63 years. Residence Cincinnati. Funeral Service at Trinity Baptist Church , on Friday, April 4, 2008 at 10 AM. Friends may call Tuesday, April 8 from 4:00 PM to 8:00 PM. Cremation at Cincinnati Cremation Compay, Cincinnati, Ohio. Memorials may be made to American Cancer Society/ Joseph P. Sample Funeral Home, Inc. serving the family. www.samplefuneralhome.com			

This Data is for Register Book 3 - Family Record ONLY:

Family members can be entered in *two different ways*: to appear on lines preprinted on your register book, or free form as you want them to appear. Check the button marked Enter family

using memo to use the obituary or family data (constructed by clicking on the family button on the Obituary page of the Case Data). If you use the separate lines method, remember that you can use more than one name per line, but you are limited by space to ten lines.

**PALL
BEARERS**

TerraPro CardShop

Choose Card: Register Book 6 - Pall Bearer Page

Font Font = *Font Script 093*

 Text Color

Vitals	Service/Disposition	Family	Pall Bearer	Music/Clergy	Photograph	Funeral Program
			Pall1	David Devon Decker		
			Pall2	Patrick Preminger		
			Pall3	Robert Edwin Hinklin		
			Pall4	Harold W. Rockwell		
			Pall5	George W. Bush		
			Pall6	Barack Obama		
			Pall7			
			Pall8			
			Pall9			
			Pall10			

This Data is for Register Book 6 - Pall Bearer Page ONLY:

Figure 27 - Pall Bearer Data Entry

If you know the names of Pall Bearers in advance, here is where you can put the names. Honorary Pall Bearers can be so indicated.

**MUSIC /
CLERGY**

TerraPro CardShop

Choose Card: Register Book 8 - Music and Clergy

Font Font = *Font Script 093*

 Text Color

Vitals	Service/Disposition	Family	Pall Bearer	Music/Clergy	Photograph	Funeral Program
			Music1	Brahms Requiem		
			Music2	Mozart Requiem		
			Clergy1	Rev. Dr. Herschel T. Roper		
			Clergy2	Rev. Marcus Altha		
			Clergy3	Rev John Brown		

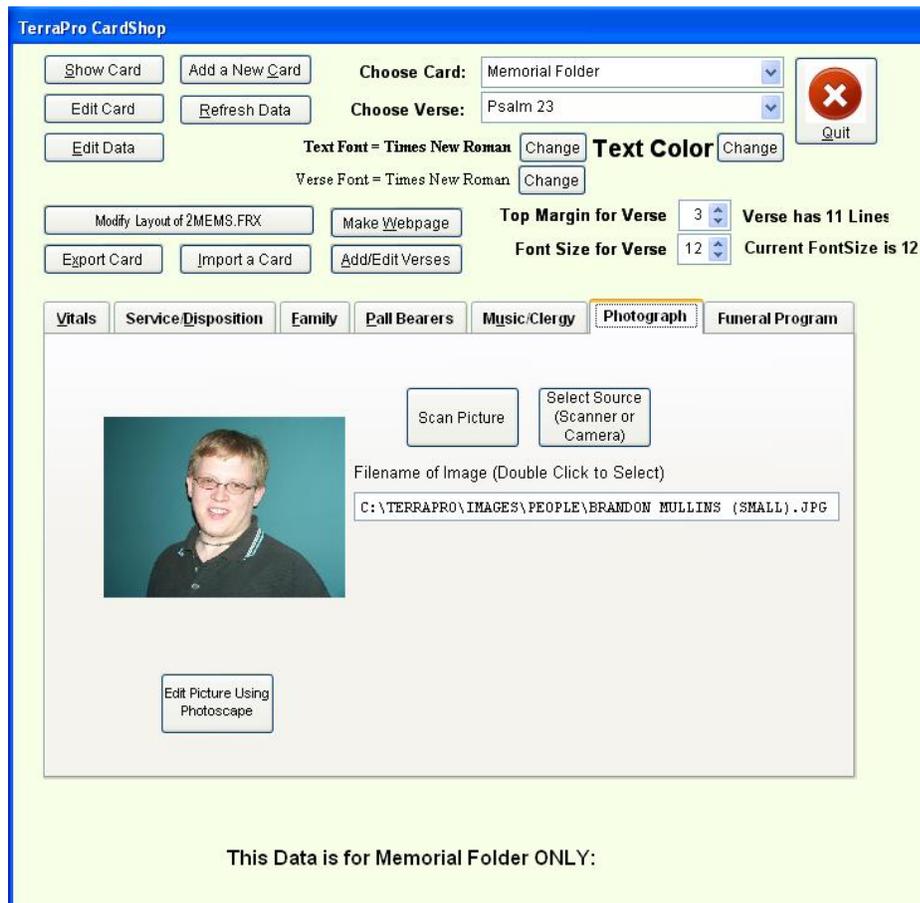
This Data is for Register Book 8 - Music and Clergy ONLY:

Figure 28 - Music and Clergy Data Entry

You can list a few of the musical selections by grouping them on a single line. The clergy is brought over from the case data, but can be changed here for any reason. You can also add a fourth, fifth or sixth clergy by grouping them on a single line.

PHOTOGRAPH

A photograph on a memorial folder can be a meaningful tribute to the deceased, and if you have a scanner or the family can supply a picture in digital format, you can add photos to any of your memorial merchandise offerings.



TerraPro can scan a photo using your scanner software. Place the picture on your scanner, click the “*Scan Picture*” button and crop and scan your picture as usual. It will be saved automatically to the TerraPro\images\people folder so that everyone on your network can retrieve it.

SELECT IMAGE SOURCE

If you have already scanned or received a photo outside of TerraPro, you MUST know where the photo is stored on your computer. Typical scanner programs save your pictures in a folder called My Pictures. The exact location of My Pictures can be discovered if you use the *My Computer* icon on your desktop or the Start Menu to explore your computer’s folders. It is important you know where the photo is saved, and *if given the opportunity to save the picture* after scanning, you should put them in the TerraPro (or VTP) folder under a folder named People within a folder named Images. (typically C:\TerraPro\images\people)



What are Folders?

Just like file folders that hold related information in your filing cabinet, folders on the computer hold files (pictures, documents, etc.) that are related to each other.

Just like your filing cabinet, the computer does not care what you call your folders or files. However, if you don't remember where you put a folder (what you called it) then you could have trouble finding it later on. It is best to write up some rules about where you will be saving your pictures and placing them near the computer so everyone knows where they are stored.

Printing Reports

Getting information back that you have entered is easy with the TerraPro Report Generator. It can help with accounting and bookkeeping tasks, or give you information about the status of your business.

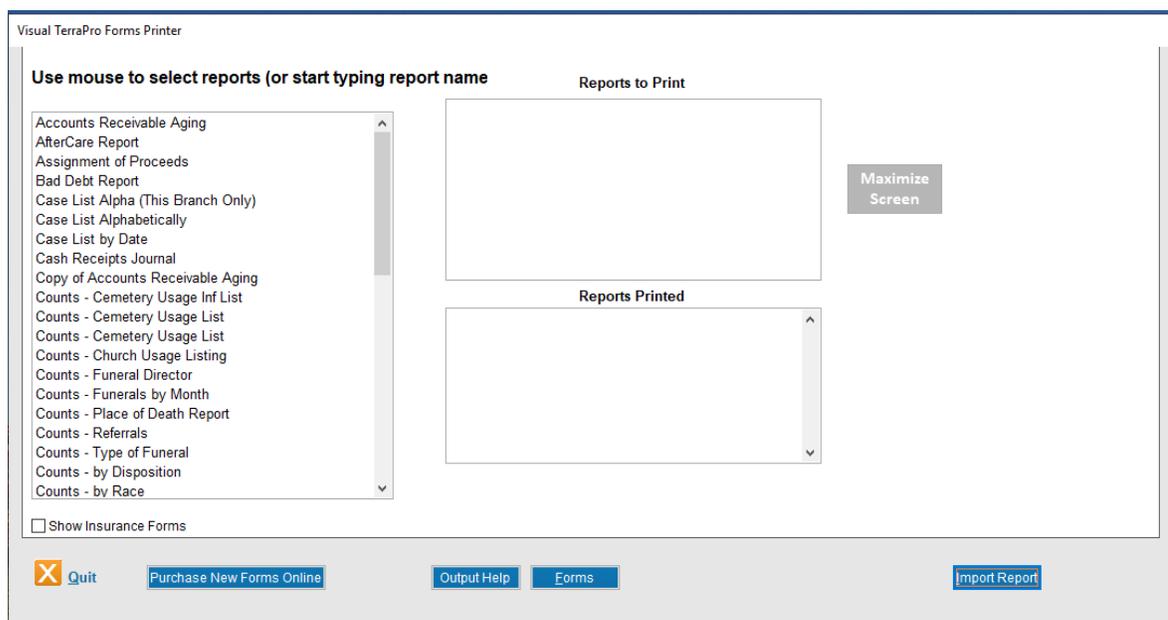


Figure 29 - Reports Screen

You can Print Reports very quickly. Choose Reports from the Main Menu. The screen above will appear and you can choose to print any report on the list.

Use the mouse to click on the desired report, and it will be added to the list of Reports to be printed. When you click on print, each report will be brought up in turn, and you may then be asked for some input, such as starting and ending dates for the report (if appropriate). Enter the information required and the report should appear on the screen. You may then choose to print the report or close it.

AfterCare

Keeping contact with your families promotes goodwill in the community and enhances your image as a caring business.

TerraPro comes with a complete Post Service Follow-up system. It can help you keep in touch with your families and provide information for them to make decisions about preplanning and other services you offer.

To access the system, you will use the Survivors screens. Each survivor can be approached separately for After Care services and recording of contact information. Use the help button for guidance.

Survivors File for Robert David Probos - Case # 2015-004- Died January 20, 2021

SURVIVOR: Georgia May Foolery

Prospect?
 Approach for Marker?

	Due	Made	Staff initials	
Post Service Followup	02/01/2021	02/01/2021	DH	Add to Google Calendar
Six Month Call	07/21/2021	///		Add to Google Calendar
Anniversary Card	01/10/2021	///		Add to Google Calendar
Annual Followup:	01/20/2022	///		Add to Google Calendar
One Month Followup	02/19/2021	/// : : AM		Add to Google Calendar

Results: Sympathy Letter to Georgia Foolery Letter Printed on 01/26/2021 10:54:24 AM

[X](#) Quit

Figure 302 - After Care (Post-Service Followup) Screen

Checking the box next to the word “*Prospect?*” will automatically fill in milestone dates such as follow-up calls and anniversary dates. You can change the descriptions of your aftercare milestone dates and the elapsed time before these dates by **right-clicking** the date box you wish to change. These changes will then apply to ALL subsequent survivors tracked by the system. You may freely change the dates for a particular survivor without affecting others.

When dates for follow-up are entered on these screens, a report can be generated showing the past due contacts which need to be made. At that time, the After Care consultant can make those calls and record the results of the call. With this system in place, everyone who has access to the computer can see what is happening with each of the After Care recipients, and step-in to follow-up in the event of a phone call from the survivor.

Report Designer - psfp. frx - Page 1

Date: 01/15/2003
Time: 13:46:40

Donald O'Connor Funeral Home, Inc.
Post Service Followup Report

Name of PreNeed Contact	Deceased / Funeral Date
Relation to Deceased: Informant Also MotherPerson Responsible	
Marcella Haley 2623 Saddleback Drive Cincinnati, OH 45244 Home Phone: 513/232-2384 Work Phone:	Brent J. Haley March 24, 1998 Post Service Followup Due: April 7, 1998

Post Service Call Made: _____

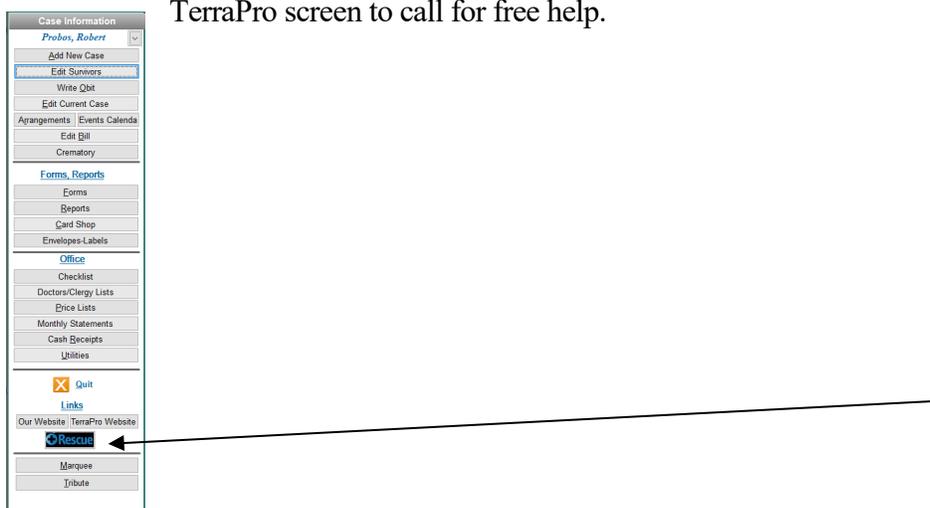
Results: _____

Figure 31 - Sample After Care or Pre-need Solicitation Report

As with all other TerraPro reports, the content of this report can be edited if necessary.

You may wish to place this survivor on a mailing list for mass mailings. If so, use the main survivor screen tab, and enter two letter codes to indicate your different mailing lists. See Chapter Seven, “*Envelopes and Labels*”, for more details about mailing lists.

If you are having any trouble understanding this feature, please use the Rescue button on the main TerraPro screen to call for free help.



LETTERS

TerraPro comes with a wide assortment of pre-written letters, all of which can be modified or copied to make new letters. Choose the Letters tab on the Survivors screen to access letters. These letters can be sent to a specific person or group of people (Standard Letters), or can be sent to all those requiring followup. (After Care Letters). Click the help button for a quick reminder of how this system works.

To start, choose a letter to be sent using the **Choose Letter** button at the upper left. Upon selection, the letter will be previewed, and can be printed if desired. If you want to make changes, just opt to exit out of the preview using the door icon.

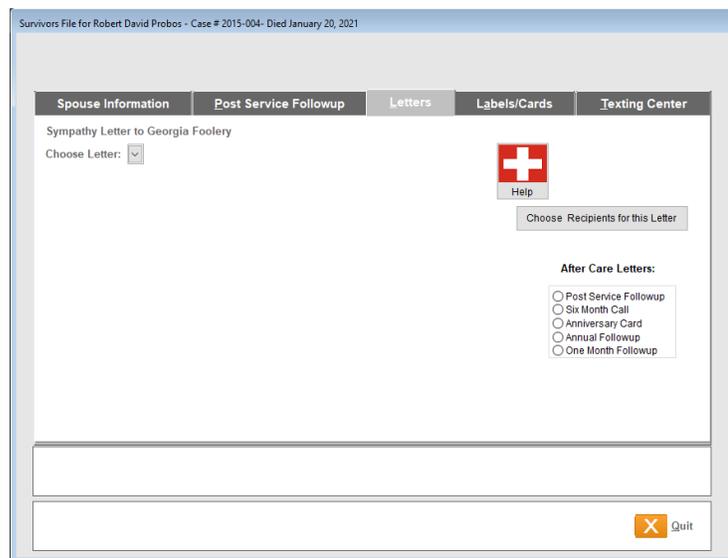
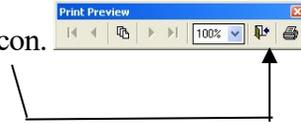


Figure 32 - Followup Letters

Choosing Edit after you have selected a letter will allow you to change the content:

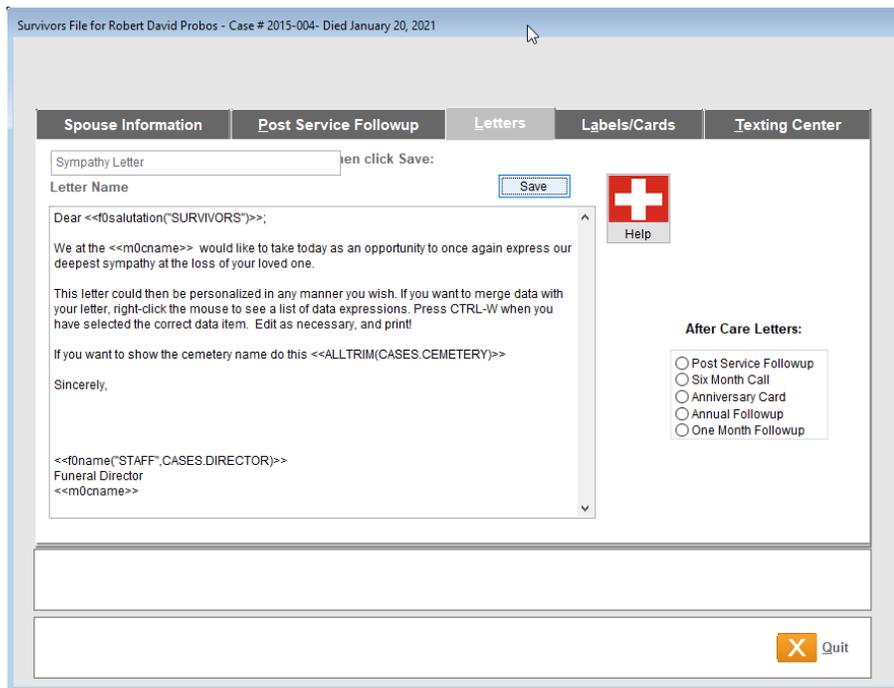


Figure 33 - Editing the Letter

You can change the name of the letter and setup what the data environment will be before printing the letter. **YOU CANNOT CHANGE FONTS ON THIS SCREEN.** You will need to choose Modify when printing the letter to modify fonts and paragraph styles.

You can type the letter to say whatever you want. To insert a merge field (data that will change when the letter is sent to a different person), you can surround the merge field with << and >> delimiters.² If you don't know what to put within the << >> delimiters, right-click where you want the merge field to go. You will see the following list:

Select Data Item, then Press CTRL-W	
Descript	Sourcefld
Date of Death - long form (January 26 1994)	f0longdate(CASES.Deathdate)
Date of Death - short form (JAN 26 1994)	f0shortdate(CASES.Deathdate)
Date of Funeral Service (as entered)	ALLTRIM(CASES.Service)
Date-Today - long form like January 10, 1994	f0longdate(DATE())
Date-Today - short form (JAN 10, 1994)	f0shortdate(DATE())
Deceased's Birthplace (City, State)	TRIM(CASES->Cityborn)+IIF(.NOT. EMPTY(CASES
Deceased's Date of Birth (Numbers)	CASES.Birthdate
Deceased's Date of Burial (Numbers)	CASES.Burialdate
Deceased's Date of Death (Numbers)	CASES.Deathdate
Deceased's Name / First Middle Last	deceased
Deceased's Name / First, Middle, LAST Upper	ALLTRIM(CASES.First)+IIF(EMPTY(CASES.Middle)
Deceased's Name / Last, First Middle	ALLTRIM(CASES.Last)+", "+ALLTRIM(CASES.First
Deceased's Residence (Address)	f0address("SURVIVORS", "SE")
Deceased's Residence (City, State ZIP)	f0csz("SURVIVORS", "SE")
Deceased's Residence (Street)	f0street("SURVIVORS", "SE")
Deceased's Residence - State Only	f0state("SURVIVORS", "SE")
Deceased's Residence - ZIP Code Only	f0zip("SURVIVORS", "SE")
Deceased's State of Death	ALLTRIM(CASES.Statdeath)
Disposition	ALLTRIM(CASES.Disposal)
Disposition of Body - Prints Other Method	IIF(UPPER(ALLTRIM(CASES.DISPOSAL))="OTHEI
Disposition of Body - Puts XX if Burial	IIF(UPPER(ALLTRIM(CASES.DISPOSAL))="BURIA
Disposition of Body - Puts XX if Cremation	IIF(UPPER(ALLTRIM(CASES.DISPOSAL))="CREM.
Disposition of Body - Puts XX if Donation	IIF(UPPER(ALLTRIM(CASES.DISPOSAL))="DONA

Figure 34 - TerraPro data merge expression list

² This is very similar to the way Microsoft Word handles data merging except your data source is your TerraPro data.

You can choose any data expression that matches what you need to merge into your letter. If the data expression does not exist on the list, you can add it by pressing CTRL-Y and filling in the appropriate data expression. This could be copied (using CTRL-C) from another form by modifying that form and grabbing the data expression and then pasting it here (using CTRL-V). Or you can call TerraPro personnel and they will help you determine the expression you need in order to retrieve the data.

Pressing CTRL-W then pastes the correct merge field into your letter:

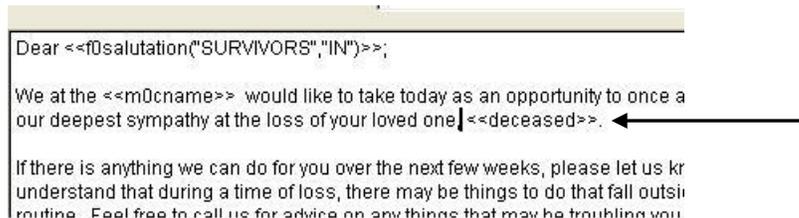


Figure 35 - Letter with new merge field << deceased >> added.

You can also copy (clone) an existing letter to make a new one. Just be sure you give it a unique name and letter code. Edit the letter to say what you want, and you have a new letter ready to go. If you need to change fonts on the letter, add your letterhead or otherwise customize the letter format, choose Print, then choose Modify. See the Chapter Ten for a tutorial on how to modify reports.

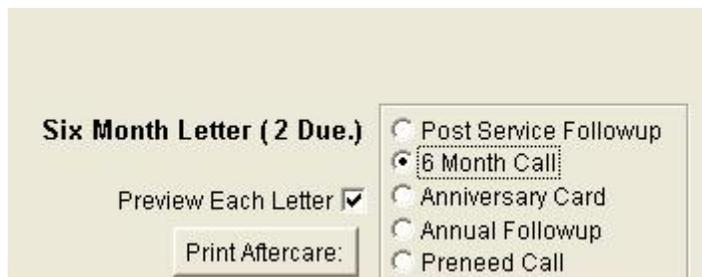
**AFTER CARE
LETTERS**

After Care is one of the best tools you have for maintaining a presence in your community. When your community knows you, and remembers a positive experience at your funeral home, they are more likely to call you in time of need.

Fortunately, you have purchased a very powerful tool to help you maintain contact with those you have served. TerraPro's After Care System can handle your contact management, mass mailings, to-do reminders and follow-up all in one place.

The concept is simple: You make yourself visible and accessible as you serve your families. Make mental notes, or hand out a card or fill-in (short) form. Later, these cards can be entered into the After Care System.

Following the steps outlined at the beginning of this chapter, you can start developing your contact list into a very valuable tool. After-Care Letters can be sent using the built-in schedule of Post-Service Follow-up – 2 weeks after service, Six Month Call, Anniversary Card and Annual Follow-up and a Pre-need Solicitation Letter at any time.



Envelopes and Labels

A complete mailing list program is provided within TerraPro, to ease the task of addressing envelopes and tracking names and addresses of all your contacts.

To access the Envelope Printer, select Envelopes – Labels on the Main TerraPro Menu. You will see the following screen:

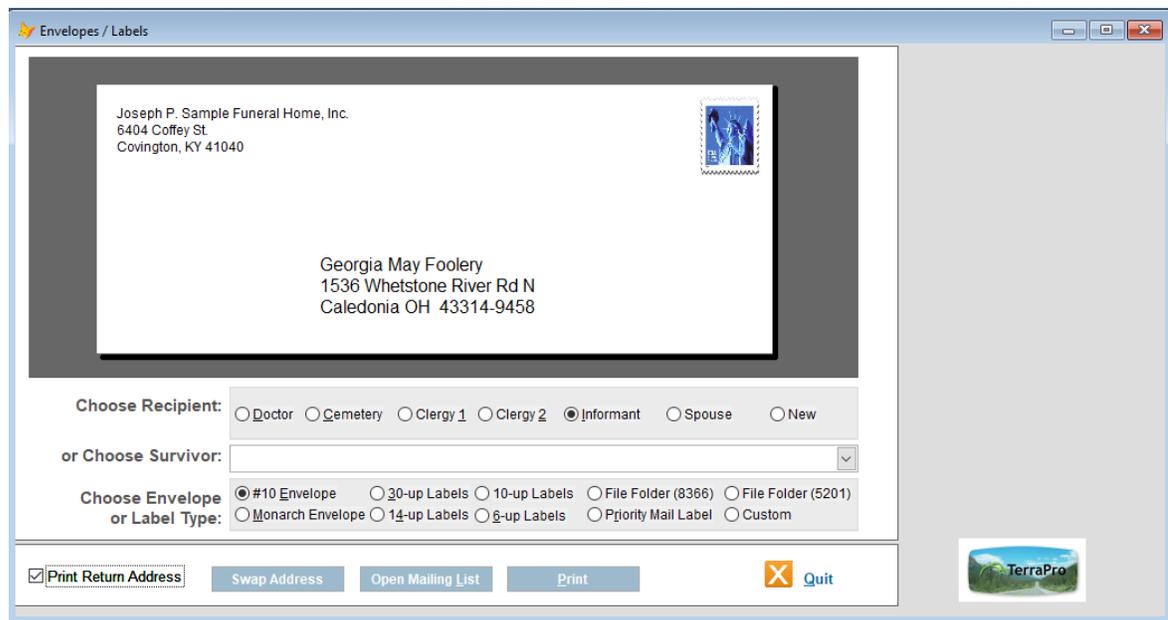


Figure 36 - Envelopes and Labels Screen

If you want to use a plain envelope, click on the box labeled Print Return Address and your funeral home address will appear. You can print a Self-Addressed, Stamped Envelope (SASE) by clicking the *Swap Address* button at the top.

You can type over any address that appears (return address or main address) to create a custom, one-time envelope for immediate use.

To select commonly used addresses, you can click on Doctor, Clergy 1 & 2, Cemetery or Informant. (informant comes up first by default). The list of survivors for this case is below those

choices; click on the arrow to the right and the list will pop up. Then the address (if entered) will be placed on the envelope.

There are two envelope and four label formats available – to choose one, click on the appropriate check box next to its name. For labels, use Avery 5160 labels for the 30-up labels, 5162 for 14-up and 5164 for 6-up shipping labels. The post office can supply you with Priority Mail labels.

**PRINTING
LABELS**

When you choose a label format such as 30-up, the following appears on the screen:

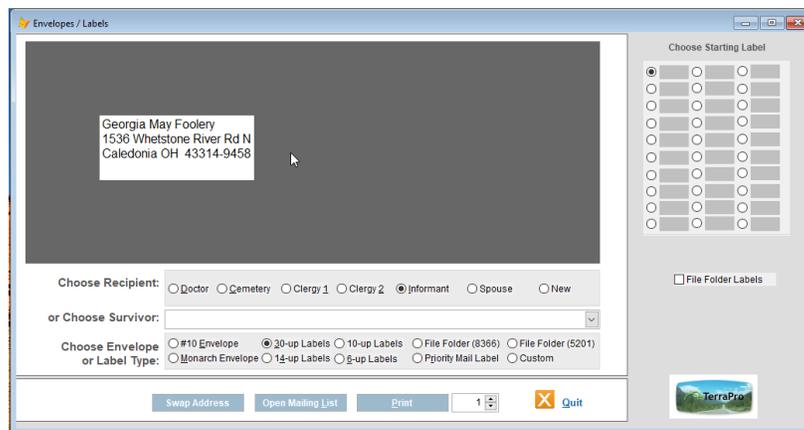


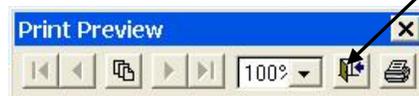
Figure 37 - Label Guide

The diagram at the right side of the screen allows you to select which label to start printing on. This can save many sheets of partially-used labels and avoid excessive costs of purchasing labels, only to throw away half of them. We recommend starting at the bottom of the sheet to lessen jamming in the printer when some labels have been used.

At the lower right you can choose how many of the labels you need (in case you want to produce more than one label to the same address.)

For the 30-up labels only, you can also check the box labeled “File Folder Labels” and the address will change to the Decedent Name, File Number and Death Date so that you can print a spiffy looking label for your paperwork file folder. You can also print Avery File Folder Labels by choosing that option. We also have included a spare “custom” label for special needs.

When you have made your selections, click Print, load labels in the printer and check the preview screen for any last minute changes, and then click print. (click on the Exit button if you don't want to print.)



**MAILING
LISTS**

Click on the Mailing List button, and you will see the screen below:

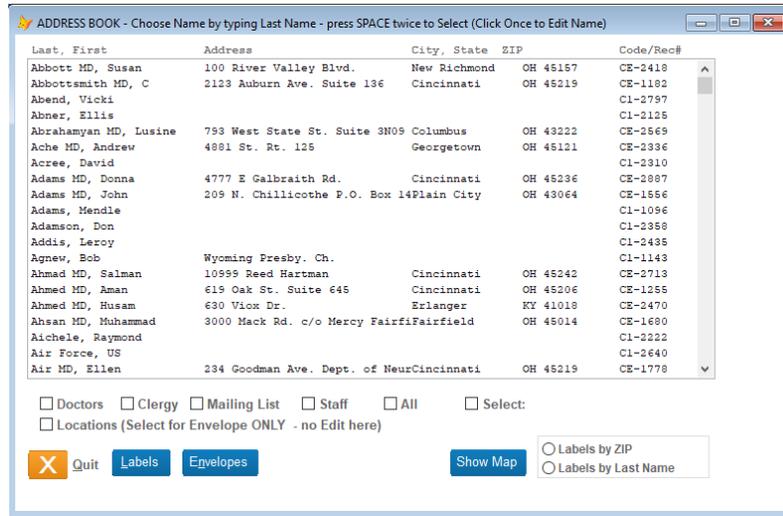


Figure 38 - Mailing List Screen

Your mailing list is made up of all the Doctors, Clergy and Staff you have been entering as you enter Case Data. In addition, whenever you place a survivor on a mailing list by adding up to 10 two-character codes in their record, they will appear on up to 10 mailing lists. It's up to you to define the codes you create for these lists. TerraPro will maintain your code list for you. Choose the list you want by clicking on one of the check boxes. The box labeled **Select:** will let you choose from your mailing list codes you defined on the Survivors Screen.

To choose a name, you can just start typing the last name. The list will automatically move to the letters as you type them, so long as you do not pause too long between letters. When you get close, switch to the arrow keys (or mouse) to make the selection. Clicking on the name and then clicking on Paste will paste the name and address on the label or envelope you selected previously. You can also press the space bar twice quickly to paste the name. Highlighting the name with the space bar or mouse also allows you to Edit the name:

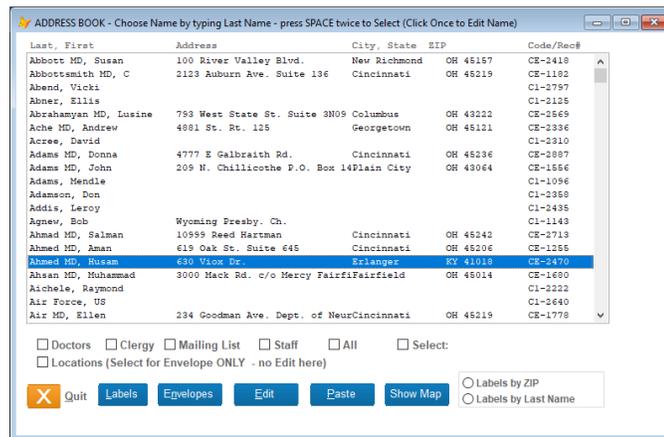


Figure 39 - Mailing List Edit Choice (Note Highlighted Entry)

Here is the editing screen:

Certifiers List

Code: License: Inactive:

Title: Salutation: (Dear...)

First Name: Middle: Last:

Position: Sex:

PO Box or Suite:

Street:

City: State: Zip:

Phone:

Workphone:

Cell Phone:

Faxphone: E-Mail:

Figure 40 - Mailing List Edit Screen

You can make changes on any field. The Code determines which mailing list this name appears on. CE is the standard TerraPro code for Certifier or Physician. The Salutation refers to how you would address the individual in the greeting of the letter.

When finished, you can Save (use Revert only to cancel any changes you might have made in error.)

Use the other buttons to navigate around the list, Deleting duplicates if desired, or Finding on any of the fields listed. At this time, the Print button should not be used until instructed by TerraPro personnel.

If you use Add, the record may not appear on the list when Exiting the Edit screen, but will be there next time you come into the Letters – Envelope screen.

NOTES:

Price Lists

The FTC Rule is completely supported by TerraPro. You can maintain your price lists within TerraPro and then print them out for your families to review, and use them when creating your bills so that all prices agree with your price list.

GENERAL PRICE LIST

Select Price Lists from the Main TerraPro Menu, and you will see the following screen:

General Price List

Item: LINE020

For variable pricing, enter negative .01 (-.01)
For Category Heading, enter price of zero (0.00)

Description	Price	Tax Code	Taxable Portion
Professional Services Of Funeral Director & Staff	1600.00	N	

Our professional Service Charge includes, but never limited to:

- *Consultation with a licensed funeral director, family and clergy.
- *Desired wishes of family and deceased verified and instituted.
- *Carefully prepared Life Story/Obituary
- *Legal authorizations and consent for necessary services selected by family.
- *Direction of licensed funeral director and staff prior to, during, and after the services selected.
- *Legal submission of necessary paperwork mandated by state and

Included in Package Code:
 Package Sequence: 1
 General Ledger Link Code: SER

Price List Print Sequence: 9999 Put in Print Order
 Services of Staff: *
 Free Miles Allowed (if applicable): 0

QuickBooks Income Item Description: Staff Services:Basic

Figure 41 - General Price List Editing Screen

The FTC requires certain language to accompany each item on your price list in order to standardize what families see when making arrangements. This allows comparison shopping, and can work in your favor if you are offering greater value than your competition.

TerraPro uses Item Numbers to uniquely identify every item on your price list. The item numbers MUST start with the word LINE followed immediately by a three digit number to indicate in what order the items occur on the price list. We suggest that the items be numbered by 10's, so that you can squeeze another item in between two items if necessary.

To see what you have on the price list, click on the arrow at the top of the screen:

Item	Description	Code
LINE010	General Price List	SS
LINE011	Terms Of Payment	SS
LINE020	Professional Services Of Funeral Director & Staff	SS
LINE030	Embalming	SS
LINE050	Other Preparation Of The Body	SS
LINE052	Dressing & Casketing Remains	SS
LINE054	Disinfection With No Embalming	SS
LINE059	Facilities, Equipment And Staff	UF
LINE060	Visitation/funeral At Funeral Home or Other Location	UF
LINE061	One Day Visitation/Funeral	UF
LINE070	Memorial Service At Funeral Home Or Other Location	UF
LINE071	One Day Visitation/Memorial Service	UF

Notice the line number scheme; you should become familiar with it as you edit your price list. Use the mouse or arrow keys to select a price list item to work on. For now, let's choose LINE030, embalming:

General Price List

Item: LINE030 Select Item Setup Default Bills

For variable pricing, enter negative .01 (-.01)
For Category Heading, enter price of zero (0.00)

Description: Embalming Price: 650.00 Tax Code: N Taxable Portion: 0

Except in certain special cases, embalming is not required by law. Embalming may be necessary, however, if you select certain funeral arrangements, such as funeral with viewing. If you do not want embalming, you usually have the right to choose an arrangement which does not require to pay for it, such as direct cremation or immediate burial.

Included in Package Code: [] Price List Print Sequence: 9999 Put in Print Order: []
 Package Sequence: [] Services of Staff: * [] * Required Items
 General Ledger Link Code: SER Free Miles Allowed (if applicable): 0

QuickBooks Income Item Description: Staff Services:Embalming

Buttons: Add New Item, Delete this Item, Picture, <- Back, Forward ->, Cgsts, Print, Caskets/Vaults/Merch, X Quit

Figure 42 - General Price List - Embalming Item

The **description** is the short description identifying the service or facility charge. The **price** can easily be changed. The **Tax Code** indicates whether or not the item is subject to tax. (N = No, Y = Yes or H = Taxed at half value.) Below the description is the FTC wording required for this item. This may vary according to your preference of the various suggested FTC wordings.

The rest of the items on the General Price List screen have to do with how your price list can be customized:

Included in Package Code allows you to indicate that this item is part of a package. Enter the package number(s) or letter(s) that include this item.

Package Sequence allows the item to appear in the package in a different order than it does on your General Price List.

General Ledger Link Code allows the item to be linked to your General Ledger via a code which indicates what accounts are effected by the sale of this item. Typically this is used when linked to the SBT Accounting Software.

Price List Print Sequence allows you to print items in a different order on a special price list you may have. For instance, although your package prices may be further down on the General Price List Item numbers, you could list them first when you print the price list.

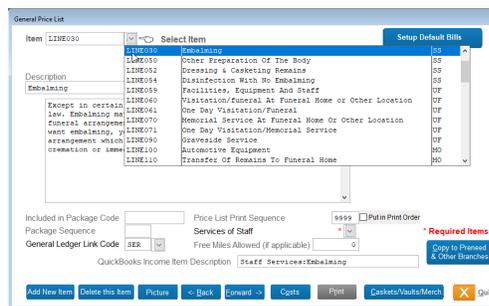
Class uses standard classifications like Services of Staff, Facilities, Livery, Merchandise, etc. to generally code the price list items. This is VERY IMPORTANT to determine, as items without a class will not show up on pull downs located on the billing screen.

Free Miles Allowed is for Automotive or Livery Charges that you wish to impose a limitation on the number of miles radius that you provide the service before charging additional mileage charges.

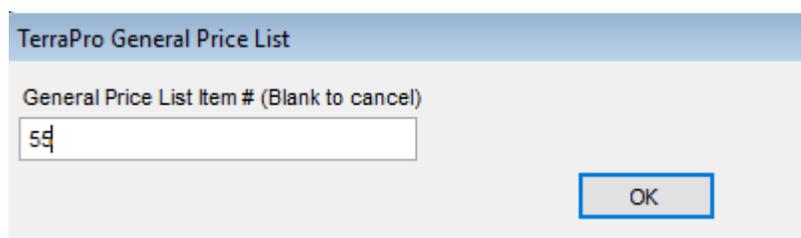
Adding New Items

The button labeled **Add New Item** can be used if you want to add a new charge to your price list. **Before you hit this button**, you need to know where in the price list the item will appear. Take a look again at the pull-down list of General Price List items, and determine a number that falls between two others where you want to insert the item.

For purposes of example, let's assume you want to add Hairdressing as one of the chargeable items under Other Preparation. Pull-down the list to see what numbers are used:



Other Preparation is LINE050 and the Use of Facilities Header is LINE059. Let's use LINE056 for our Hairdressing Charge. That way, if we want to add other preparation charges, we can use 57-58 for them. Now click on the Add New Item button. All you have to do is type the number, TerraPro will add the correct formatting.



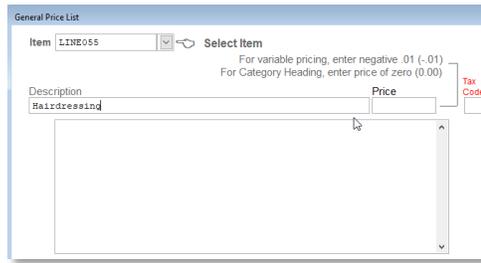


Figure 43 - New item Added to General Price List

Notice that Item LINE055 has been added. You can type any description you like, but for purposes of illustration we are showing the word Hairdressing. You can choose any price you like, and depending on your state sales tax code, determine whether the service is taxable or not (Y or N or H for half is taxed)

**VARIABLE
PRICING**

Because the FTC allows some General Price List Items to have a range of prices (such as the casket and vault), we can indicate this by entering a negative penny (-.01) into the price field. Then the price list will print the word “Variable” whenever it encounters this coded price.

**CATEGORY
HEADINGS**

To make a heading, such as “Facilities Charges”, just make the price zero (0.00). When the price list is printed, this line will be formatted as a heading, which will give your price list an easy to read format.

Casket and Vault Price Lists

TerraPro can handle an unlimited number of caskets on your price list. However, we recommend entering only the caskets you usually use. (The ones on your current Casket Price List)

If you prefer to have ALL caskets from your casket vendor, call TerraPro support to get help with adding an Excel or other electronic format list.

If you use Batesville, Astral or Aurora Caskets, and enter Batesville, Astral or Aurora as the vendor, TerraPro can link to the webpage, E-Litho or Digital Litho programs from those vendors to use the vendor supplied pictures, descriptions, etc.

Printing Price Lists

The FTC funeral rule states that you must have your price lists available for public inspection. These include the General Price List and Casket and Vault Price Lists.

TerraPro comes with a standard format for price list printing, but you can choose from several formats, or have our staff design one to fit your needs.

Selecting Traditional Service and Casket Package, we see the following:

Qty	Merchandise	Price	Tax	Ext
1.00	Casket	0.00	<input checked="" type="checkbox"/>	
1.00	Vault	0.00	<input checked="" type="checkbox"/>	
1.00	Register Book plus 50 acknowledgement card	30.00	<input checked="" type="checkbox"/>	\$ 30.00
1.00	Prayer Cards (memorial cards) (per 100)	40.00	<input checked="" type="checkbox"/>	\$ 40.00
0.00		0.00	<input type="checkbox"/>	\$ 0.00
0.00		0.00	<input type="checkbox"/>	\$ 0.00
0.00		0.00	<input type="checkbox"/>	\$ 0.00
0.00		0.00	<input type="checkbox"/>	\$ 0.00
0.00		0.00	<input type="checkbox"/>	\$ 0.00
				\$ 70.00
Cash Advances				\$ 70.00
1.00	Certified Copies of Death Certificate (Hamilito)	18.00	<input type="checkbox"/>	\$ 18.00
1.00	Newspaper Notices	0.00	<input type="checkbox"/>	\$ 0.00
1.00	Clergy	0.00	<input type="checkbox"/>	\$ 0.00
0.00	Flowers	0.00	<input checked="" type="checkbox"/>	\$ 0.00
0.00		0.00	<input type="checkbox"/>	\$ 0.00
1.00	Cemetery Charges	0.00	<input type="checkbox"/>	\$ 0.00
0.00		0.00	<input type="checkbox"/>	\$ 0.00
0.00		0.00	<input type="checkbox"/>	\$ 0.00
0.00		0.00	<input type="checkbox"/>	\$ 0.00
0.00		0.00	<input type="checkbox"/>	\$ 0.00
0.00		0.00	<input type="checkbox"/>	\$ 0.00
0.00		0.00	<input type="checkbox"/>	\$ 0.00
				\$ 18.00
			Total Amt of Bill	\$ 3,386.73
			Total Finance Charges	\$ 0.00

Professional Services		Price	Tax
1.0	Basic Services of Funeral Director & Staff	1562.00	<input type="checkbox"/>
1.0	Embalming	495.00	<input type="checkbox"/>
0.0		0.00	<input type="checkbox"/>
0.0		0.00	<input type="checkbox"/>
0.0		0.00	<input type="checkbox"/>
0.0		0.00	<input type="checkbox"/>
		\$ 2,057.00	
Facilities			
1.0	Viewing/Vistation (One Day)	375.00	<input type="checkbox"/>
1.0	Funeral Ceremony	370.00	<input type="checkbox"/>
0.0		0.00	<input type="checkbox"/>
0.0		0.00	<input type="checkbox"/>
		\$ 745.00	
Automotive			
1.0	Transfer of Remains	238.00	<input type="checkbox"/>
1.0	Funeral Coach (Hearse)	254.00	<input type="checkbox"/>
0.0		0.00	<input type="checkbox"/>
0.0		0.00	<input type="checkbox"/>
		\$ 492.00	
Other Services			
0.00		0.00	<input type="checkbox"/>
Alternative Services		\$ 3,294.00	
0.00		0.00	<input type="checkbox"/>

Total Taxable Amount	70.00
Tax Rate	6.75%
Total Tax	4.73

Irrevocable

Change Tax Rate

Checklist

Copy to Preneed & Other Branches

Print List of Selected Items

Figure 45 - Setting up Default Statment of Goods

This screen contains the charges that will appear for a standard funeral with a prior day visitation. Editing this screen looks and feels exactly like editing a bill for a specific client, but only serves the purpose of determining the standard and usual charges which will appear on a bill when first created.

To edit this screen, click on any item. You can type a different price, or use the pulldown to the right of each price to choose a different service from the General Price List. Pressing Enter on the price will jump to the next item, where you can leave things as they are or change or add another item. **The key to using this screen is organization:** you must first setup your General Price List to reflect the actual way you do business. Secondly, you must bring those charges onto the screen.

**ITEMIZING
VS.
PACKAGES**

Whether you itemize every charge or simplify your billing by grouping services into Package Plans, you must follow FTC regulations throughout the process. By itemizing, you are essentially doing your billing the same way the FTC requires you to do your Price Lists. When you package your services together, it might be necessary to explain in writing using a Statement of Goods and Services to explain what is included in each charge. Either way works in TerraPro, so feel free to choose whichever suits your way of doing business.

TerraPro supports “Itemized Packages”. Right clicking on any item adds that item to the package, and when the bill is printed, it can show the package price by totaling those items. This gives you complete freedom in setting up and modifying package pricing.

It is usually a good idea to work with TerraPro consultants to assure the way you have configured your price list will produce the results you wish. For example, if your accountant requires reports regarding the quantity and dollar value sold of each of your price list items, you probably will have to itemize on the bills so the sales data is available. On the other hand, if the sales journal just needs to summarize services, automotive, merchandise and cash advances, a one line package price can provide this information.

**ADDING
DEFAULT
BILLS**

When setting up the Default Bills for the other offerings, such as Direct Cremation, just change the items included on that particular type of funeral. To add other default bills, Click the Edit List button. Then follow the on-screen directions, making sure to give each default bill a 4-5 character code.

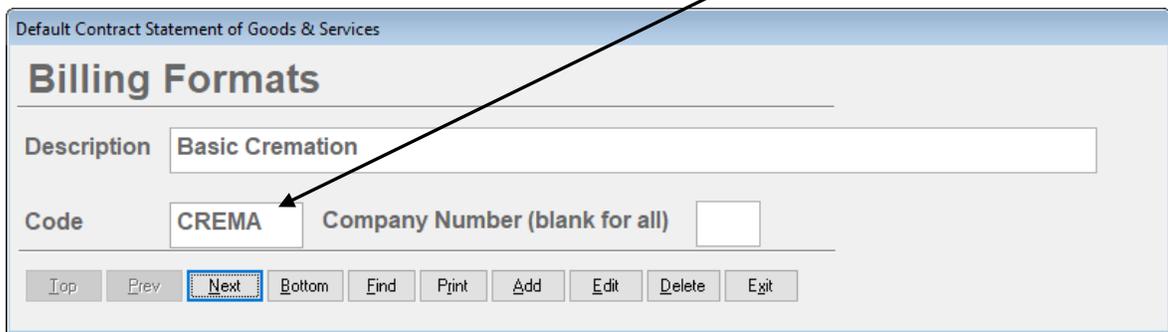


Figure 46 - Adding More Default Bills

After adding the definitions similar to the above format, you can setup each default bill as you like.

NOTES :

Billing

TerraPro is a complete Accounts Receivable System. Billing is the heart of this system, and allows you to present Statement of Goods, Invoices, Monthly Statements and Contract Forms. In addition, once a bill is entered, it automatically appears on the Accounts Receivable Report, in addition to your Sales Journal and Sales Tax Reports.

If you have completed Chapter 8, Price Lists, you are already an expert at doing billing. If you setup your Default Statement of Goods, you will have a template from which all bills can be created. Your standard and usual charges will appear automatically on each bill, but can be changed, added to, deleted or prices modified at will.

Clicking on the Edit Bill Menu choice on the Main TerraPro Menu will produce one of three results:

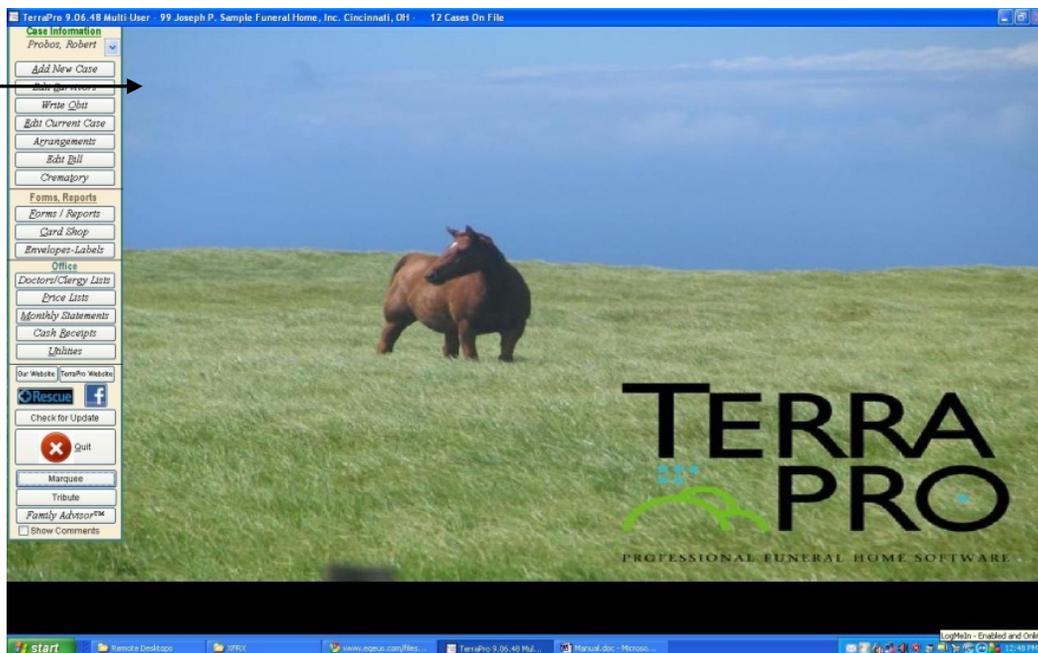


Figure 47 - Choose Edit Bill from Main TerraPro Menu

1. You will be taken directly to a previously entered bill for this case.
2. You will be asked to choose which billing format to use, then taken to the bill editor.
3. You will be denied access because you have not determined who will pay the bill.

**NO PERSON
RESPONSIBLE
ENTERED**

Let's look at result 3. Although the informant is usually responsible for the bill, this is not always the case. For example, if the case was a Pre-need, a trust account may be the person responsible. No matter who it is, that person or entity must be identified before a bill can be entered. If you don't know who will be responsible, just assign a PR code to any survivor, remembering that it can be changed at any time.

Figure 48 - Spouse Record - Note PR code in Other Relationships

If later you need to change the Person Responsible (PR) code, remove it from one survivor and place it on another. If there is more than one Person Responsible, at this time TerraPro can only address a bill to one person responsible. If you need to send a bill to two parties, the work-around would be to print the bill, then change the person responsible, and print it again. You would have to manually indicate the amount each person was to pay, if needed. See also the ability to assign different individuals to pay different items on a bill.

**CHOOSE
BILLING
FORMAT**

If no bill has yet been started for this case, you can choose which billing template to use. See Chapter Nine for details. You can have an unlimited number of default (pre-set) bills covering Direct Cremations, Immediate Burials, Memorial Services, etc. that will simplify billing. Choose the format you want to use by clicking on the arrow at the end of the pull-down list, and then clicking on the billing format you want:

Funeral Type	Code
Basic Cremation	CREMA
Basic Cremation with Graveside	CREMG
Basic Cremation with Off-premise Memorial Service	CREMO
Default Statement of Goods	
Traditional Graveside Service	GRAVE
Traditional Memorial Cremation Service	TRMCS
Traditional Service and Casket Package	TRADI
Traditional Service and Cremation Casket Package	TRCCP

Figure 49 - Choosing a Billing Format

Once you click on the format, you will be taken to the bill editing screen:

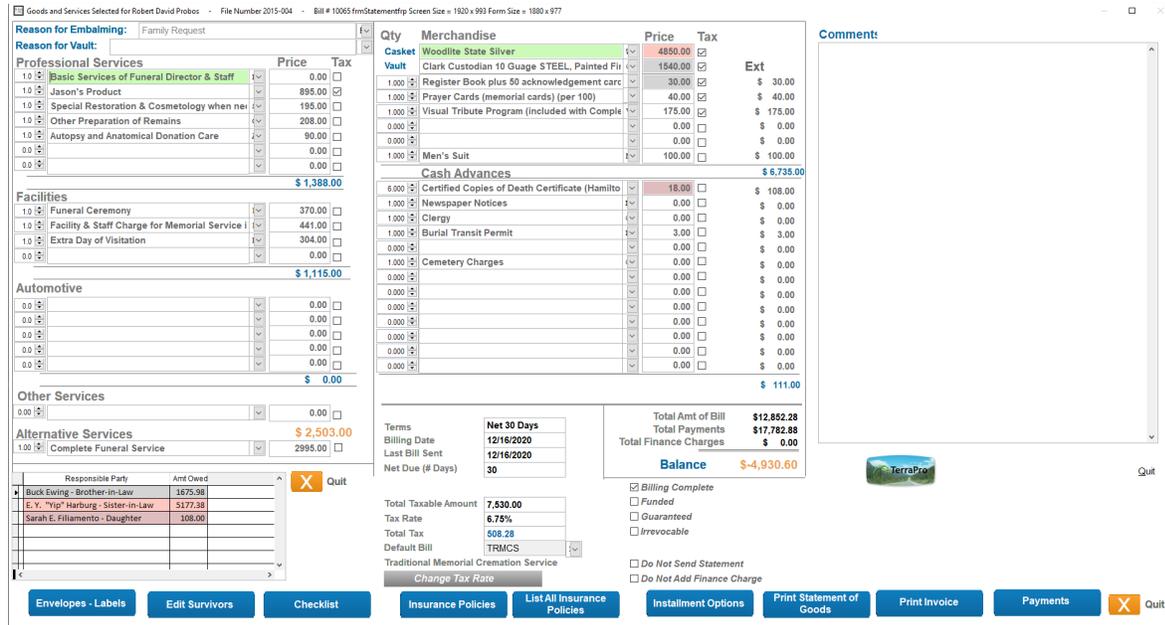


Figure 50 - Billing Screen



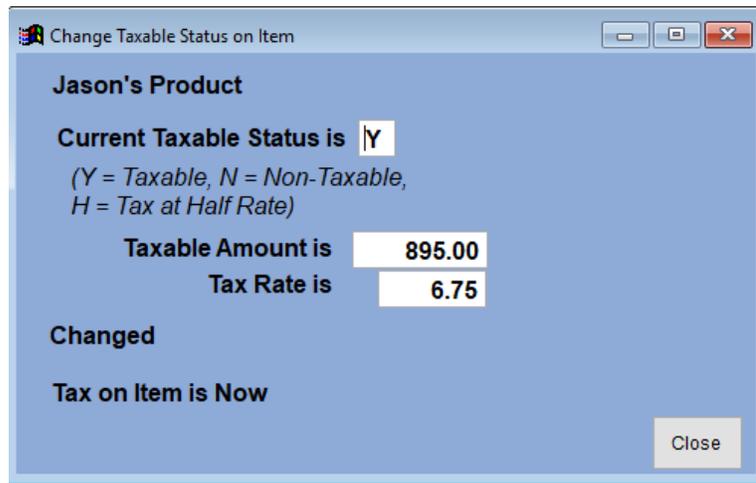
Note: If you can't see the entire screen as shown above, your screen setting may need adjusted – this screen only works properly at a resolution of 1024x768 or better – you can minimize TerraPro by clicking on the Minimize button at the top right of your screen. Then you can adjust your screen properties by right-clicking on the desktop background or using the control panel from the Start menu.

You can **Enter the Price** if you need to change it. For even-dollar amounts like \$395, just enter 395 and press tab or enter. You don't need the decimal OR the dollar sign. It is best if your cursor is at the beginning of the price entry box, not somewhere in the middle, so try to get into the habit of using the TAB or ENTER key to move around the screen, saving the mouse for big jumps.

If you want to choose a different item than the one shown, **use the pulldown lists** to select from the Price List. Click on an item and both the description and price will be placed on the bill. If the item you want to use is not on the list, go to the Price List screen and make sure the "Category" has been assigned (Services of Staff, Facilities, etc.)

Most items are assumed to be a quantity of one. For some items, however, it might make sense to indicate a quantity; for example, death certificates or memorial folders. Even if you price by boxes of 25 or 50 cards, you may need to indicate 2 or more boxes. If you want to indicate how many were sold, Click on the spinner at the left of the description **to Change Quantity**. **Hint:** For a **No Charge Item**, enter a Quantity of 1, Price of Zero. The item will show "No Charge" on the bill. **EXCEPTION:** For Casket and Vault, entering a description without a price will allow you to define which casket was used in a package price which includes a casket. (Version 9.00.36 or higher)

Toggle Tax Occasionally, you may have to change the tax as charged on a given item. To change it, click the check box to the right of the price and you will see this screen:



You may then choose to make the item taxable, non-taxable or taxable at half value. When you do, you will be shown the tax amount calculated on the item. Closing this window will update the totals on the bill, and the total tax. You may also change the taxable amount of the item if it is different than the price charged. For example, the casket price can include the entire funeral service, so you should change the taxable amount to the appropriate figure to tax the items that are included in the package that are taxable.

COMMENT

You can add a comment to a bill by filling in the comment area. You may need to contact TerraPro personnel to add this comment to your custom invoices.

Let's explore the buttons at the bottom of the billing screen:

PAYMENT

As payments are made toward this bill, they are entered using the payment screen. To access this screen, click on the Payments button. You will see this screen:

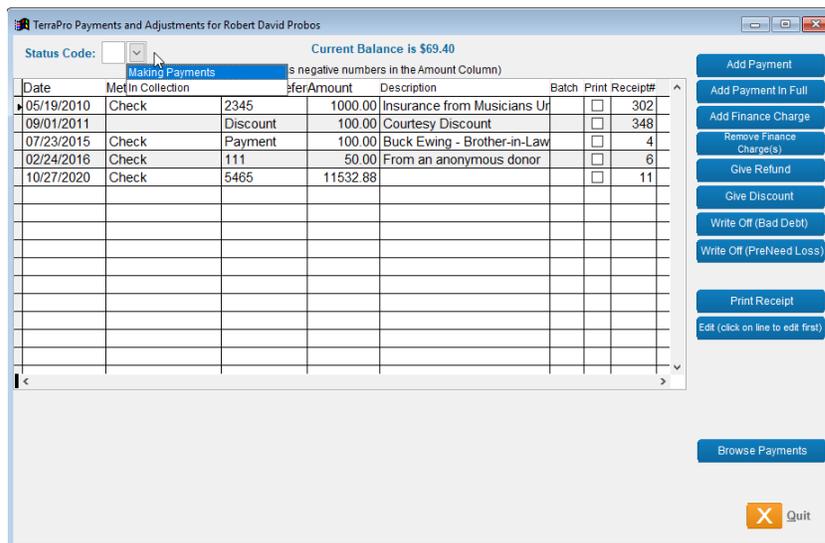


Figure 51 - Payment Entry Screen

Any of the previously entered payments can be edited from this screen, or new ones can be added. Click on Add Payment or one of the other buttons to add Finance Charges, Refunds or Discounts. Pull down the Status list to choose a status for this bill. (optional)

You can **set the status** of a bill (Making Payments, In Collection, etc.) Right click on the status pulldown to edit status descriptions.

The **finance charge** is calculated on the monthly finance charge percentage rate entered into your setup when TerraPro was first installed. If you need to change it, select Utilities, Setup, and change the percentage rate. As with other entries, you have the opportunity to Save, Edit or Cancel.

By default, the **refund** amount is the balance remaining on the bill. Since most refunds are issued on a disputed amount, this is the most likely amount. Of course, the amount can be edited.

Once again, the discount amount is the balance on the bill. Occasionally, you may find the need to adjust a Pre-need bill downward to match the contract amount, or to discount the entire bill or a certain item. Enter the date, amount and description and an account number if linked to SBT.

Deleting an entry is done by clicking in the leftmost column. Make sure the line says DELETED once you have deleted the payment

Click the **Edit Receipts** Button to allow editing of previous receipts on the payment grid.

Receipts can be printed for each payment or for a group of payments. The receipt printer is an extra cost add-on which can be purchased using PayPal (or your own credit card) from this screen. Just click on *Print Receipt* for details.

TAX RATE	We see we can adjust the Sales Tax charged on this bill using the Tax Rate button:
-----------------	--

Clicking the button labeled **Change Tax Rate** will highlight the **Tax Rate** box. where you may change the tax rate, or the **Total Taxable Amount**, along with the **Actual Tax Charged**. This is particularly handy when transitioning from a manual to the computer system, as many times the tax is rounded differently when calculated using a calculator. (It has to do with whether a total taxable figure is calculated, then multiplied by the tax rate, or whether each item's tax is added together.)

DATE	The date of the bill can be changed to reflect your wishes in aging this bill. By default, today's date is used when the bill is created. Edit the date as need for proper aging of this bill.
-------------	--

NET DUE DAYS	If you wish to adjust the number of days before the bill is considered past due, change the Net Due Days. This bill will be aged accordingly. (The default net due days is controlled by your setup, under the Utility Menu.)
-------------------------	---

DO NOT SEND STATEMENT	TerraPro will allow you to send monthly statements automatically (see Utility Menu). However, in some cases you may want to avoid sending out a statement for a particular customer. If so, check this box.
----------------------------------	---

SHOW COSTS	If you have entered your overhead costs (with optional costing module), TerraPro will calculate your gross profit on an individual bill, allowing you to make decisions about your pricing and costs. Click here to see your profit!
-----------------------	--

**ENVELOPES &
LABELS**

You can print an envelope after printing the bill by clicking here. You can also click on **Person Responsible** to edit addresses and names.

START OVER

It is possible to erase the current bill and start over if too many lines need changed or the wrong billing format was chosen. Use this option only as a last resort, and never if the bill has already been sent to QuickBooks. (You will need to manually delete the invoice in QuickBooks if you create a new one here.)

CHECKLIST

A shortcut to the checklist for this case is provided here for your convenience.

**INSURANCE
POLICIES**

A shortcut to the insurance policies for this case is provided here for your convenience. You can enter the insurance information and print claim forms or proof of death forms from this screen. See Chapter 10 for details.

**LIST ALL
INSURANCE
POLICIES**

A list of insurance policies entered above can be printed to verify information with the informant..

**INSTALLMENT
OPTIONS**

You can set up periodical payments if necessary. A payment book and payment schedule can be printed.

Printing Bills

TerraPro comes supplied with many billing formats but can be customized to print almost any type of bill you wish. Complete instructions for modifying bills are beyond the scope of this manual, but TerraPro personnel will be happy to assist you in achieving the results you desire.

When you press print, you are presented with a choice as to whether you want to show payments that have been made. Click on the check box if you wish payments to be shown.:

Let's choose Invoice. Next, we have a list of possible formats for the bills. These are setup for you when TerraPro is installed but can be added to, deleted or revised.

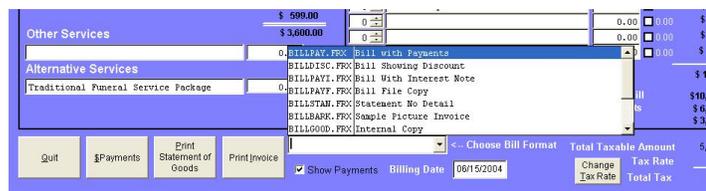


Figure 52 - Choice of Bill Formats

For now, just choose the Bill with Payments. You will see a bill that looks something like the following:

Joseph P. Sample Funeral Home, Inc. 6404 Coffey Street Cincinnati, Ohio 45230		Print Preview	
To: Karen Sue Haldeman 6404 Coffey Street Cincinnati, OH 45230		Statement January 23, 2003	
Services for the Funeral of David Joseph Haldeman Date of Death: February 26, 2002 Date of Service: November 24, 1993			
Description	Tax	Amount	
Services of Funeral Director and Staff		600.00	
Embalsming		275.00	
Hair Dressing		25.00	
Washing and disinfecting remains when no embalming		50.00	
Use of facilities for viewing (per day)		50.00	
Use of facilities for funeral service		125.00	
Transfer of Remains to Funeral Home		75.00	
Funeral Casket at Funeral Home		125.00	
Limoness		100.00	
Blue Metal/18"Gal/Light Blue Casket		2500.00	
SB T Burial Vault		1250.00	
Acknowledgment Cards (Per 25 cards)		15.00	
Special Register Book		50.00	
Prayer Cards (per 100)		15.00	
6 Certified Copies		42.00	
Police Escort		45.00	
Flowers		85.00	
Cemetery		150.00	
Death Notices		75.00	
Chapman		50.00	
	Total Amount of Bill	5772.00	
	Sales Tax	212.96	
	Grand Total	5985.96	
Finance Charges			
	11/12/1993 November Finance Charge	19.43	
	01/23/1994 December Finance Charge	15.68	
	Total Finance Charges	35.11	
Payments			
	02/23/1993 On Account - Karen Haldeman 23.42	-1600.00	
	02/26/1993 1st Haldeman - Life Savings 6080	-500.00	
	02/28/1993 On Account - Karen Haldeman 34.53	-4500.00	
	02/28/1993 Sweeney's Bank 23987	-10.00	
	12/02/1993 Insurance Proceeds - Civil Medication 99933	-2000.00	
	01/23/1994 on Account - Karen Haldeman 4416	-4000.00	
	Total Payments	-6010.00	
	Balance Due March 26, 2002	10.47	

Figure 53 - Standard Invoice

You can preview each of the billing formats provided to understand the differences in each. If you don't check the detail payments box, the payments will be summarized:

Joseph P. Sample Funeral Home, Inc. 6404 Coffey Street Cincinnati, Ohio 45230		Statement January 23, 2003	
To: Karen Sue Haldeman 6404 Coffey Street Cincinnati, OH 45230		Statement January 23, 2003	
Services for the Funeral of David Joseph Haldeman Date of Death: February 26, 2002 Date of Service: November 24, 1993			
Payments			
Services of Funeral Director and Staff		600.00	
Embalsming		275.00	
Hair Dressing		25.00	
Washing and disinfecting remains when no embalming		50.00	
Use of facilities for viewing (per day)		50.00	
Use of facilities for funeral service		125.00	
Transfer of Remains to Funeral Home		75.00	
Funeral Casket at Funeral Home		125.00	
Limoness		100.00	
Blue Metal/18"Gal/Light Blue Casket		2500.00	
SB T Burial Vault		1250.00	
Acknowledgment Cards (Per 25 cards)		15.00	
Special Register Book		50.00	
Prayer Cards (per 100)		15.00	
6 Certified Copies		42.00	
Police Escort		45.00	
Flowers		85.00	
Cemetery		150.00	
Death Notices		75.00	
Chapman		50.00	
	Total Payments	5772.00	
	Balance Due March 26, 2002	10.47	

Figure 54 - Detail Invoice, Summarized Payments

Next let's look at Statements. Click on the button labeled Statement of Goods. You will see this dialogue box::

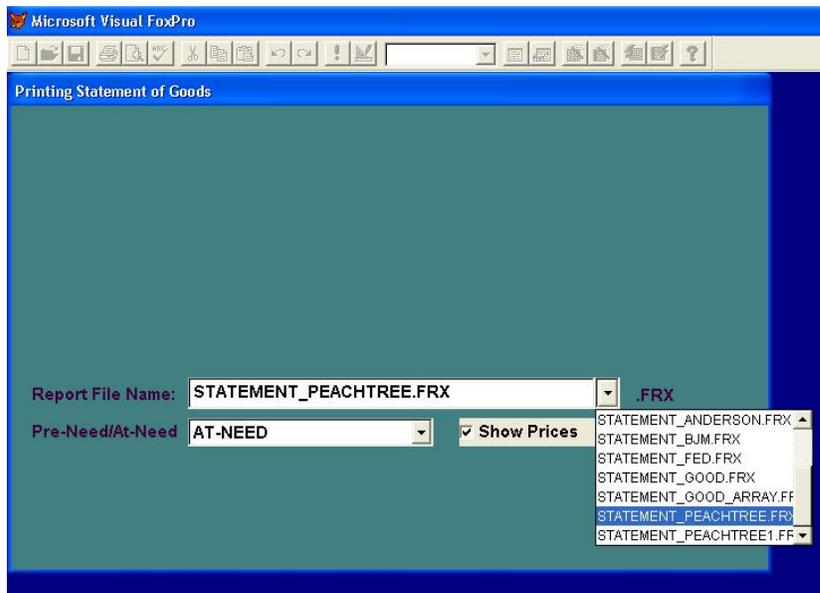


Figure 55 - Statement of Goods Dialogue Box

This screen allows you to choose the Statement of Goods format to be used (if left empty, STATEMENT.FRX is used). The Pre-need Funeral Contract separates the Guaranteed and Non-Guaranteed items. Uncheck the Show Prices box if you want a blank form to use at the arrangements conference.

There are several formats supplied with TerraPro, and others are available:

Joseph P. Sample Funeral Home, Inc., Inc.
6404 Coffey St
Cincinnati, Ohio 45230
513/484-9729

DATE January 26, 2007 SERVICE NO. 2007-850
DECEASED NAME David Joseph Haldeman
DATE OF DEATH April 1, 2008 PLACE OF DEATH St. Joseph Hospital

Charges are for only those items that you selected or that are required. If we are required by law or a cemetery or crematory to use any items, we will explain in writing below. If you selected a funeral which required 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 approve if you selected arrangements such as a direct cremation or immediate burial. If we charged for embalming, we will explain the reason below.

STATEMENT OF FUNERAL GOODS AND SERVICES SELECTED

A. CHARGE FOR SERVICES

1. PROFESSIONAL, FACILITIES, and AUTOMOTIVE

Basic Services of Funeral Director & Staff.....	\$1,562.00
Embalming.....	\$436.00
	\$208.00
Viewing/Vistation (One Day).....	\$375.00
Funeral Ceremony.....	\$370.00
Transfer of Remains to funeral home/mortuary.....	\$160.00
Funeral Coach (Hearse).....	\$254.00
Flower/Utility Vehicle.....	\$107.00
Limousine.....	\$137.00

TOTAL OF SECTION A. SERVICES \$3,609.00

B. CHARGE FOR MERCHANDISE

CASKET:	
BURIAL VAULT:	\$1,210.00
Wilbert MONTICELLO.....	
Acknowledgment cards (100).....	\$100.00

TOTAL OF SECTION B. MERCHANDISE \$1,410.00

The only warranty on the casket and/or outer burial container sold in connection with this service is the express written warranty, if any, granted by the manufacturer. This funeral home makes no warranty, express or implied, with respect to the casket and/or outer burial expense.

Billing to: Karen Sue Haldeman
6404 Coffey Street
Cincinnati, OH 45230 Home: 513/232-4076 Work:

I hereby agree that I have examined the above-stated items and found them to be correct and according to the arrangements requested, and I hereby acknowledge receipt of a copy of this memorandum and agreement. I hereby represent that I have sufficient funds and assets legally available for payment of cash price and hereby agree and covenant jointly and severally to make payment of \$4,360.79 within 30 days. A late charge of 1.50% per month amounting to 18.00% per year is applied to the unpaid balance beginning 30 days from the date of this agreement. Any additional services or merchandise ordered or requested after the date of this agreement will be considered part of this agreement and the cost thereof will be reflected on the final statement. I acknowledge that I have received the general price list and have been offered for review the casket price list and the outer burial container price list.

Signed _____ Date: _____
Co-signed _____ Date: _____
Name of funeral home representative _____

C. SPECIAL CHARGES

Forwarding of Remains to Another Funeral Home.....	
Receiving of Remains from Another Funeral Home.....	
Direct Cremation (as selected).....	
Immediate Burial (as selected).....	

TOTAL OF SECTION C. SPECIAL

D. CASH ADVANCES

3 Certified Copies of Death Certificate.....	\$30.00
Burial Transit Permit.....	\$3.00
Newspaper Notices.....	\$426.00
Clergy.....	\$100.00
Telephone Charges.....	\$76.39
Transportation Charges.....	\$100.00

TOTAL OF SECTION D. CASH \$735.39

SUMMARY OF CHARGES

A. CHARGES FOR SERVICES.....	\$3,609.00
B. CHARGES FOR MERCHANDISE.....	\$1,410.00
C. SPECIAL CHARGES.....	\$0.00
D. CASH ADVANCES.....	\$735.39
E. SALES TAX, IF APPLICABLE.....	\$91.65
TOTAL FUNERAL HOME CHARGES.....	\$5,846.04

LESS CREDITS & PREPAYMENTS

TOTAL CREDIT APPLICABLE \$1,485.25

TOTAL BALANCE DUE..... \$4,360.79

If any law, cemetery or crematory requirements have required the purchase of any of the items listed above the law or requirement is explained below.

Cemetery requires outer container

Reason for embalming _____
Family request

Relationship to Deceased _____
Relationship to Deceased _____
Initials _____

Figure 56 - Statement of Goods and Services

A Pre-Need contract looks like this, with Guaranteed and Non-Guaranteed items separated:

Joseph P. Sample Funeral Home, Inc., Inc.			
6404 Coffey St Cincinnati, Ohio 45230 513/484-9729			
PRE-NEED FUNERAL CONTRACT			
Arrangements For: David Joseph Haldeman		Date: January 26, 2007	Arranged by: _____
GUARANTEED ITEMS		TOTAL	1310.00
1. SERVICES SELECTED			
Basic Services of Funeral Director & Staff	1562.00		
Embalming	436.00		
Other Preparation of Remains	208.00		
Viewing/Visitation (One Day)	375.00		
Funeral Ceremony	370.00		
Transfer of Remains to funeral home/mortuary	160.00		
Funeral Coach (Hearse)	254.00		
Flower/Utility Vehicle	107.00		
Limousine	137.00		
TOTAL	3609.00		
2. ALTERNATIVE SERVICE SELECTION			
TOTAL	0.00		
3. MERCHANDISE SELECTED			
V37 DaVinci Bronze Casket	0.00		
Wilbert MONTICELLO	1210.00		
Acknowledgment cards (100)	100.00		
Register/Attendance Books	0.00		
Memorial Folders/Prayer Cards	0.00		
Register/Attendance Books	0.00		
Visual Tribute Program (included with Complete Service)	0.00		
Additional Prayer Cards	0.00		
Clothing	0.00		
		4. CASH ACCOMMODATION ITEMS	
		Certified Copies of Death Certificate	10.00
		Burial Transit Permit	3.00
		Flowers	0.00
		Cemetery	0.00
		Newspaper Notices	426.00
		Clergy	100.00
		Telephone Charges	76.39
		Transportation Charges	100.00
		Paid in Advance	1485.25
		TOTAL	2200.64
SUMMARY			
		TOTAL FUNERAL HOME CHARGES	5019.00
		SALES TAX	91.65
		TOTAL CASH ADVANCES	735.39
		GRAND TOTAL	5846.04
ADDITIONS/CREDITS			
		10/25/2007 From Howard	200.00
		10/25/2007 From Mary Hecker Estate	300.00
		10/25/2007 From Ivaloo Hemmerly Estate	400.00
DISCLOSURES:			
If you selected a funeral that may require embalming such as a funeral with viewing, you may have to pay for embalming except in certain cases, if any. You do not have to pay for embalming you did not approve if you selected arrangements such as direct cremation or immediate burial. If we charge for Reason for Embalming: Length of Time, Viewing			
The cemetery requires the use of a concrete or steel outside burial container. The crematory requires the use of a casket or an alternative container.			
TERMS AND CONDITIONS			
When all goods and services that have been contracted as part of your specific Pre-Need plan have been paid in full, said goods and services will be initialized into a Homesteaders Life Insurance Company Pre-Need Policy.			
Joseph P. Sample Funeral Home, Inc. will then guarantee the price of those specific goods and services at the time the pre-arrangement is made. THIS DOES NOT PERTAIN TO CASH ADVANCED ITEMS DUE TO THE FACT THE FUNERAL HOME DOES NOT CONTROL THOSE CHARGES.			
All cash advanced items, which are charges that originate outside the funeral home are NON-GUARANTEED ITEMS. These costs are put into a separate Homesteaders Pre-Need policy under Non-Guaranteed Items and will incur interest over the length of the policy term, but if said costs should exceed the policy's interest growth, additional funds may be due at the time of need. Should interest exceed costs, then a refund of the difference will be issued to the beneficiary of the policy.			
At the time of need, the total GUARANTEED ACCOUNT, including the principal interest, will be transferred to Joseph P. Sample Funeral Home, Inc. These funds are transferred in exchange for guaranteeing the goods and services provided by the funeral home as part of your specific pre-need plan described on the attached itemized memorandum.			
All funds are placed into two Homesteaders Life Insurance Company Pre-Need Policies - one being for Guaranteed goods and services provided by the funeral home; the other being Non-Guaranteed items (also known as CASH ADVANCES) into a second policy. The policies are then made irrevocable and said funds may not be removed from the policies until the time of need.			
If any merchandise and/or services are unavailable at the time of need, Joseph P. Sample Funeral Home, Inc. shall furnish merchandise and/or services similar in style and at least equal in quality and workmanship.			
PURCHASER ACKNOWLEDGEMENTS			
I/We hereby agree that I/We have acknowledged the terms and conditions as outlined above. I/We have examined the charges stated and found them to be correct and according to the arrangements requested.			
I/We hereby acknowledge receipt of a copy of the statement of the Funeral Goods and Services selected.			
By His/Her signature on this agreement, the purchaser acknowledges receipt of a current General Price List, a current Casket Price List, a current Outer Burial Container Price List and each of said documents, were made available to Him/Her prior to His/Her selection of services and merchandise.			
This agreement is binding on the Heirs, Administrators, Executors, Successors and assigns of the parties and is subject to the Illinois Funeral or Burial Funds Act under which this funeral home is and will remain licensed and Bonded.			
Billing to:		ACCEPTANCE: The funeral establishment agrees to provide all services, merchandise and cash advances indicated on this statement.	
Karen Sue Haldeman		By _____	Date: _____
6404 Coffey Street			
Cincinnati, OH 45230			
Home: 513/232-4076 Work: 513/232-4076			
Signed X _____		Cosigned X _____	Date: _____
cosigned X _____			Date: _____

Figure 57 - Pre-need Contract Statement of Guaranteed and Non-Guaranteed Items

Linking to Other Accounting Software

TerraPro links its Accounts Receivable data to Intuit's QuickBooks™. If you have QuickBooks and would like to link to it, our staff can help you make this happen. If you would like to do-it-yourself, the steps are as follows:

1. Indicate to TerraPro that you want to link to QuickBooks by going to the Utility Menu, Setup and checking the box indicating you want to link to Accounting Software. Choose QuickBooks, and then double click to navigate to the path where the QBW file (your company data in QuickBooks) is installed. If you are on a network, you need to make sure all users have access to that folder. You will also have to setup Sales Tax Rates if your branches charge different sales tax rates.

Figure 58 - Upper Right Portion of Setup Screen

2. On your General Pricelist Screen, indicate the QuickBooks item name for EACH pricelist item. If you use sub-accounts, separate the names of the accounts with a colon, as shown below.

Figure 59 - Pricelist Screen with QuickBooks Link Activated

- The Casket, Vault and Other Merchandise Screens also need these item names or the QuickBooks Link will fail:

The screenshot displays the 'Casket Price List' application window. At the top, there are two tabs: 'Casket Price List' (active) and 'More Pictures'. Below the tabs, the 'Item' dropdown menu is set to 'CASKETO10' with a 'Select Item' button. The main form contains the following fields and controls:

- Description:** Aurora Bronze 718 Angelic
- Price:** 14795.00
- Tax Code:** Y
- Exterior:** Bronze
- Color:** White/Gold
- Interior:** Velvet
- Materials:** Velvet Interior
- Class:** Class Not Determined W- Choose ->
- Inventory:** Track Inventory
- Our Cost:** 0.000
- Qty on Hand:** 1
- Qty on Order:** (empty)
- YTD Qty:** -1
- YTD \$ Sold:** \$ -14,795.00
- Filename of Image:** C:\VTP\IMAGES\CASKETS\AURORA\A1
- Inventory Report By Dates:**
- Inventory Report:** Caskets, Vaults, Clothing, Monuments, Other
- General Ledger Link Code:** CAS
- QuickBooks Income Item Description:** Merchandise:Casket

At the bottom of the window, there is a navigation bar with the following buttons: 'Quit' (with a red X icon), 'Add New Item', 'Delete this Item', '<-- Back', 'Forward -->', and 'Export to Website'.

Figure 60 - Merchandise Screen - note QuickBooks Income Item Description

- That is it! Now TerraPro will automatically update QuickBooks whenever you make changes in a bill. Payments and adjustments will also be sent to QuickBooks.

Insurance Policies

*Insurance forms can really slow your day down. Wouldn't it be great to enter the insurance information in one place and then print the appropriate form? **Read on!***

**Note:**

Not every insurance company's forms are included with TerraPro, but any insurance company's forms can be added. We will show you how to scan a new form, add it to the list of insurance forms, and populate it with the appropriate information

**FORMS AND
DATA**

Anyone who has ever filled out a form (who hasn't?) is familiar with the idea of forms and data. A blank form is filled in with data that you gather and place in the correct areas of the form. Same applies here!

Getting a form into the computer is simple:

- You **use your scanner** (or hire someone to scan the forms for you), save the form as either a *jpg* or *bmp* type file (both work with TerraPro, and so does a *png* file³).
- You **add the form** to the TerraPro list of forms
- You modify the form and **add the appropriate data** items.⁴

Turn the page to get started.

**WHERE DO I
GET FORMS?**

Typically, you can call or write an insurance company and ask them to send or fax you a Life Insurance Claim Form. Many insurance companies have their

³ These abbreviations refer to the file extension for a given picture (a file extension is what comes after the period in a filename).

⁴ This is the hardest part, but the most fun once you get the hang of it. TerraPro personnel will be happy to assist you in this step.

forms online. For example, Standard Insurance Company's Proof of Death Claim Form is available at <http://www.standard.com/eforms/1794.pdf>

If you bring the form up on their website, your browser will give you the opportunity to save the form. For example, if you use Chrome™ as your browser, you move your mouse to the lower right area of the screen and you will see a series of buttons that allow you to print or save the pdf document:

Sample Insurance Form found online with save options in Chrome Browser

If you use Internet Explorer™ as your internet browser, your screen may look like this:

Internet Explorer's save button is at the top of the browser screen.

Regardless of which browser you use, once you save the PDF to your computer, we are ready to convert it to something TerraPro can use.⁵

We mentioned the bmp or jpg format as a file format that can be used as a background for our form design. Converting to those formats can be handled easily by Adobe Acrobat (full version), or some inexpensive pdf converters found on the internet. Here is one we use:

⁵ It would be great if FoxPro, which TerraPro is written in, supported a pdf document as a background in our forms, but it doesn't!

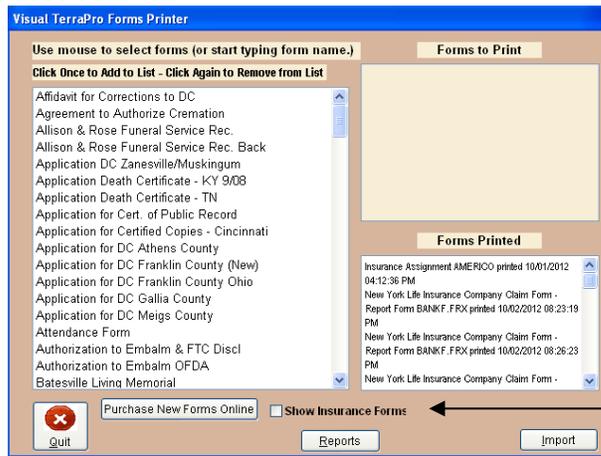
<http://www.pdf2bmp.com/> - just upload your pdf and they will convert and send it back as a jpg file.

Alternatively, you can scan a printed form into your TerraPro folder and save it as a jpg or bmp file.

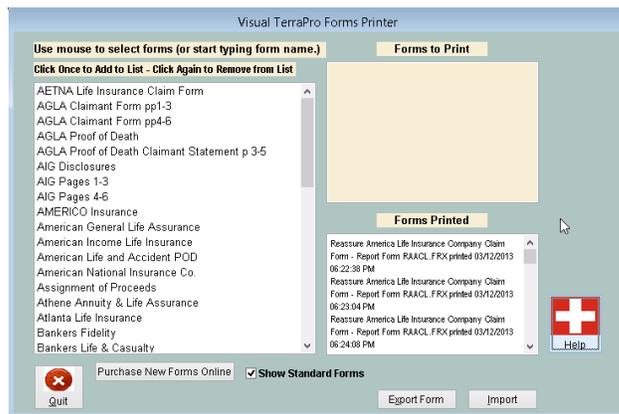
**SETTING UP
THE FORM**

Now we are ready to add the form to TerraPro's forms list. Click on Forms and Reports from the main TerraPro menu:

Choose Show Insurance Forms from the Form Selection Screen:



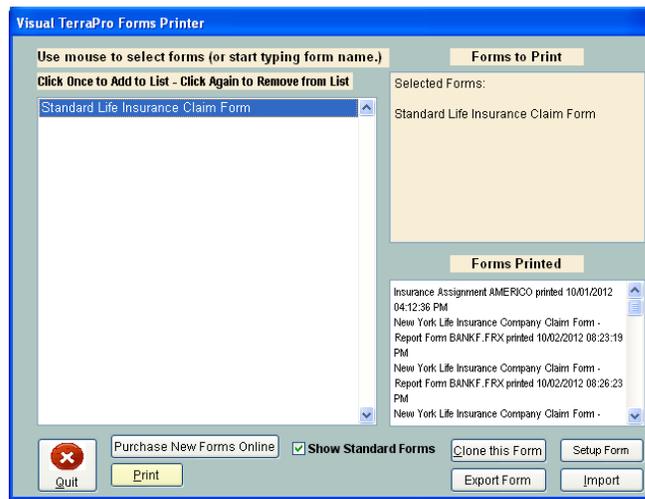
Now you can see any insurance forms that may already be setup in your system.



(If there are no insurance claim forms in your copy of TerraPro, a sample one from Standard Life Insurance is included and you can add it to your list by answering yes to the question that comes up when you choose Show Insurance Forms.)

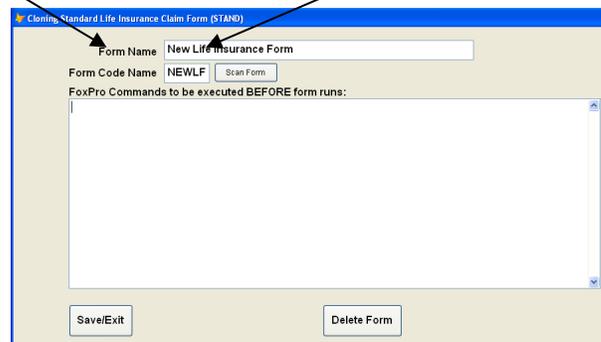
The ONLY way to add a new form is to CLONE (COPY) an existing form that is similar to the one you are creating. This saves you the time of creating a form from scratch.

Click on the form you wish to copy so that it is highlighted:

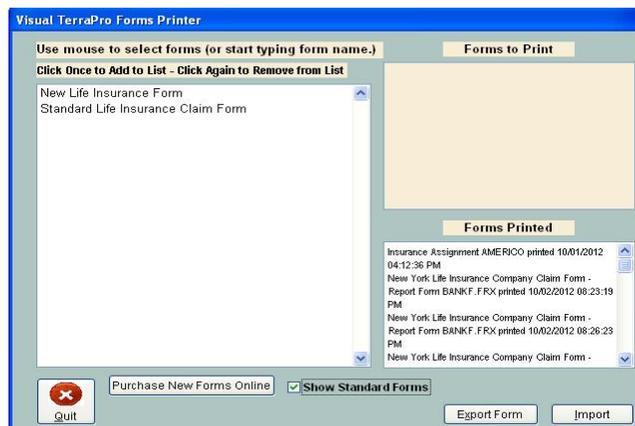


The button to Clone this Form will show up. Click it!

Give the form a name and a 5 character Form Code Name⁶:



After you type the Form Code, the Scan Form button will become visible and you can scan the form from your scanner. It will be saved in your TerraPro folder and will be named after the form code (in this case, NEWLF.bmp) We save in bitmap form so that the form is clear and bright. You can convert it later to any format you want. Ignore the FoxPro Commands unless you know what they should be. Click Save/Exit and the form will be added to your list.



If you **already have insurance forms in your system** and would like to convert them to be on the Insurance Forms list, just highlight the form on your standard forms list, click Setup Form, and change the Type of Form to INSURANCE.

This completes adding forms. You may add other forms, or proceed to the next step to add data to the forms.

⁶ The form code name doesn't matter to us – it is for the computer to use to make sure it has the right form even if you change the name of it. It will be checked to make sure it isn't already in use.

**PUTTING
DATA ON THE
FORM**

We will now move to the Insurance Screen, where the data for the forms will be added, and the forms modified and printed.

Remember, when we created the forms, we just made copies of existing forms, so the form(s) you created above won't have the correct form or data. That's what we'll do now.

Click the Edit Survivors Button on the TerraPro main menu.

Then click the Insurance Policies Button on the Survivors screen. (The Insurance Policies can be reached from the person responsible survivor record.)

Now you can see The Insurance Policy Screen:

You can move through the various policies by using the navigation buttons, print a policy, add new policies or edit the existing policy and beneficiary information.

If you have multiple policies from the same insurance company, you can easily add them without retyping all the information. When you click add, just say yes to the question about using current information.

If the insurance company information is not on the pulldown list of companies, right-click the list button to add a new insurance company (**HIGHLY RECOMMENDED**) (see page 24 for more information on how to edit locations such as insurance companies.)

Modifying Forms, Reports and Cards

TerraPro has extensive tools to help you create new forms, reports and memorial merchandise. A little study of how these work can pay off with improved productivity and a sense of understanding how the data you have entered can be retrieved.



Warning:

You must be the curious type to be effective at modifying forms, etc. If you have fear of computers or are afraid you might make things worse, this chapter might not be for you. However, if you follow the precautions covered here, there is no reason that anyone cannot learn how to change forms and reports. Learning FoxPro's quirks and tricks is key to becoming proficient in modifying forms and reports.

WHERE'S THE DATA?

One of the questions that bugs users a lot is "What happens to the data when I type it in to the screens?"

The simple answer is that it is stored on the computer's hard drive. For those interested, a hard drive is actually a metal disk inside a case inside your computer box which spins very fast (7200 rpm is not uncommon) and is magnetically charged in tiny, tiny increments into plus and minus electrical charges. These charges can be remembered by the disk because they stay there even when the power is shut down. Starting your computer activates a file access system (Windows) which can also run programs (TerraPro) which can "read" the magnetic charges on the disk and convert them to data, pictures, forms etc. Sounds like magic, doesn't it? The amazing thing is that this data is stored much the same way that telegraph messages were sent in the early part of the twentieth century. Each step along the way, data has remained compatible with the old binary method of coding letters and numbers first established by Western Union!

So much for the GeekSpeak! We don't need to know about binary coding or any of these details, fortunately!

**DATA ABOUT
DATA**

It is helpful to know, though, about databases, and specifically data tables, which are like phone books: they provide a list of information in a specific order. The advantage to computer data tables is that they can be re-arranged in any order, queried for records that match a certain set of criteria, copied, modified, edited and deleted. So it's like having a phone book that would allow you to look up a name if you knew the phone number, instead of the other way around.

FoxPro is the leading database language used around the world to track information, write programs and reports. Most of the funeral home software available today is written in FoxPro, and for good reason. Its' lightning-fast data retrieval and simple yet powerful programming language make it the ideal choice. Microsoft has a long-term commitment to improving and marketing FoxPro, and although you may not see it for sale in the computer stores, it is behind the scenes in a lot of businesses, tracking inventory, sending direct mail, fulfilling magazine subscriptions. Even the Air Force uses FoxPro! So you are in good company.

**HOW IS DATA
STORED?**

Data Tables are like ledgers – rows and columns of data tabulated (“table-ized”). Here is an example:

First Name	Last Name	Address	City	State	ZIP
1 David	Haldeman	6404 Coffey St	Cincinnati	OH	45230
2 Karen	Haldeman	6404 Coffey St	Cincinnati	OH	45230
3 Josh	Haldeman	6558 Corbly Rd	Cincinnati	OH	45230
4 Trella	Romine	1536 Whetstone	Caledonia	OH	43314
5 Jed	Haldeman	2476 Adams St.	Columbus	OH	43202

There are five records in this table (data rows). There are six fields (data columns).

**HOW IS DATA
RETRIEVED?**

When you want to retrieve data, you tell the computer which row to get the data from, and then tell it what column you want to print. For example, the data in row 3, column 3 is *6558 Corbly Rd*.

Retrieving data is easy in TerraPro, because we have done the hard work in the background of making sure that you are looking at the right row of data when you select which case you are working on. Then all you have to do is tell us what column you want to show. We use the term “field” instead of column, but they mean the same thing. Since data is stored in several different tables, it becomes necessary to preface the field name with a table name, like CASES.Last to get the last name from the CASES table. There are tables for survivors, veterans information, billing and files for storing locations, staff members and mailing list recipients. TerraPro takes care of finding the data for you, all you have to do is tell it what data you want printed on a form or report.

**FORMS,
REPORTS,
CARDS, BILLS**

Although we make a distinction between these types of computer output, they are really all from the same FoxPro Report Designer.

We only call them by different names so that your job of getting the paperwork out is easier. It's called “Divide and Conquer”. If we listed all the forms and reports in one big list, it would be harder to find the report or form you wanted.

Ok, so why call them forms and reports?

A form is usually based on a pre-printed form that used to be manually filled-out by hand or with a typewriter. It typically deals with information for just one case. Forms and Cards are examples.

A report is a list or reporting of data for more than one case: for example a Sales Tax Report will show all the taxable sales and tax collected for a given period.

**FOXPRO
REPORT
DESIGNER**

FoxPro gives us the ability to use the Report Designer for either type of output.



Let's Do It!

First, we'll take a look at a simple form to see how information shows up on the form, and how we make it show up.

Open TerraPro, if not already open, and go to Forms on the Main TerraPro Screen. You will see a list somewhat like the one below:

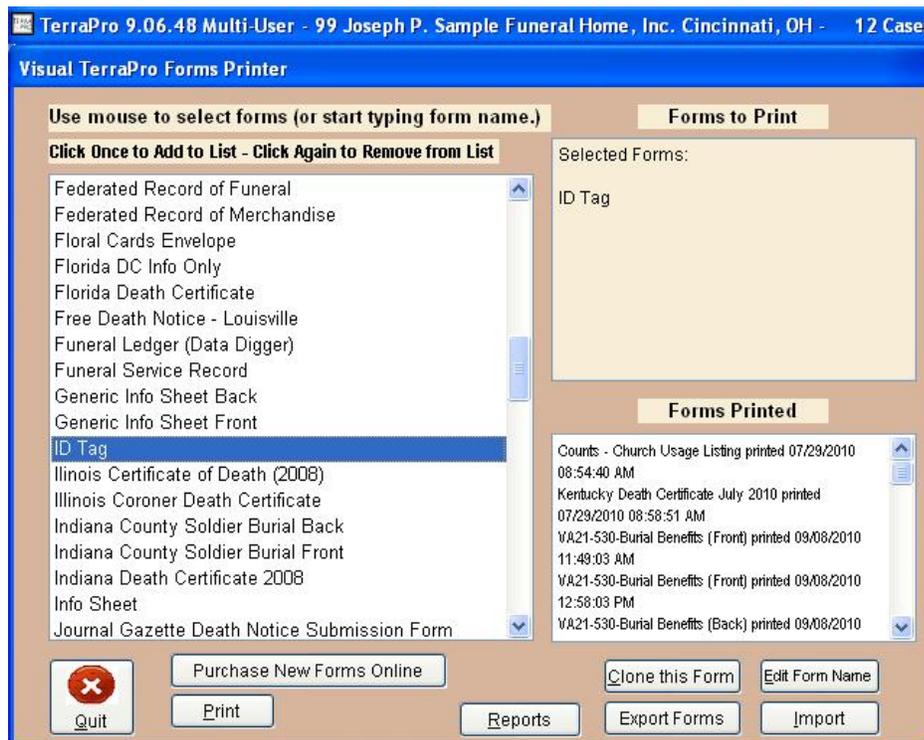


Figure 61 - TerraPro Forms List

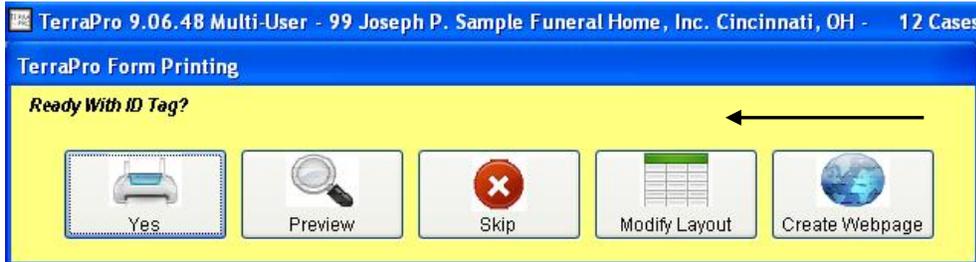
You should have a form called ID Tag. This is the federally required casket id tag that is slipped into a tube on the side of the casket to identify the remains.

When you print it, it looks like this:

Parmelee W. Duffus	
Name of Deceased	
OCT 19 1915	OCT 25 2002
Date of Birth	Date of Death
268-28-1937	
Social Security No.	
Mt. Moriah Cemetery 1	
Cemetery	Plot #
Donald O' Connor Funeral Home, Inc.	
Funeral Home	

Figure 62 - ID Tag

When select a form to print, remember that you are given the choice to Modify:



If you were to choose Modify instead of Preview, you would see the following screen:

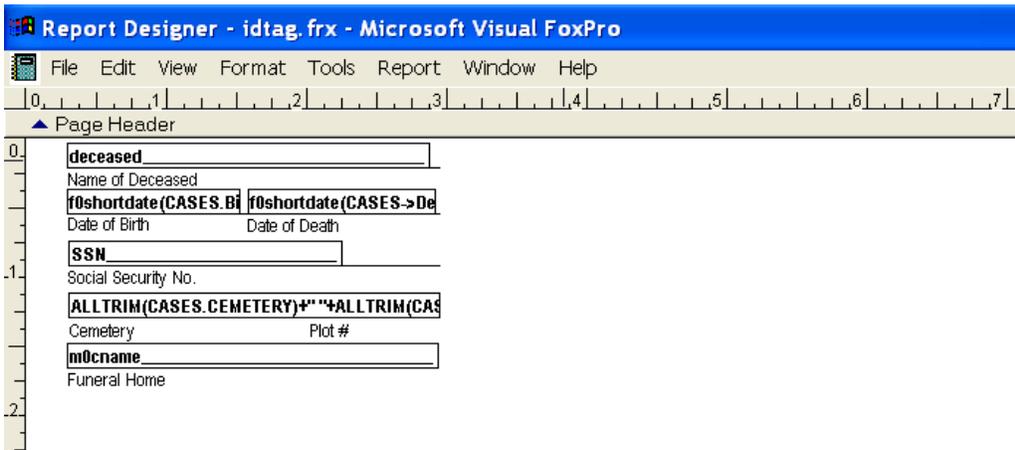
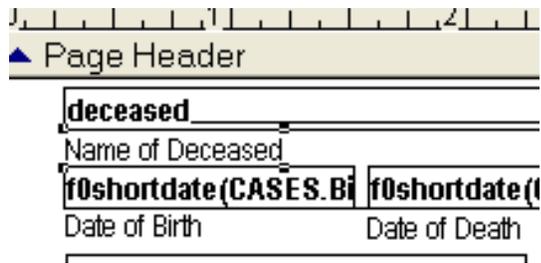
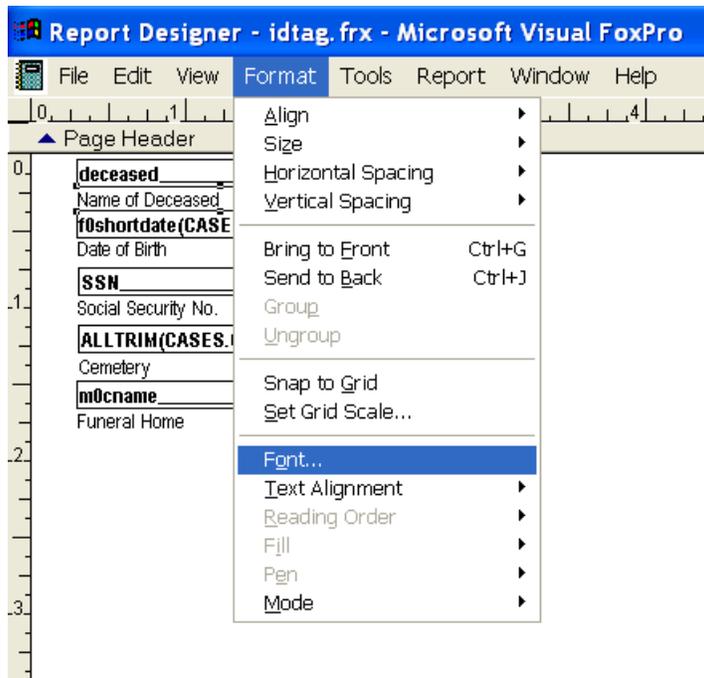


Figure 63 - The FoxPro Report Designer editing idtag.frx

Let's notice some things right away. Compare Figure 75 (above) with Figure 74 (previous page). Some words are the same, such as the captions below the lines. Others seem to be some kind of code. The captions are text, and within TerraPro, cannot be edited. However they can be formatted or deleted. Let's change the caption labeled "Name of Deceased" so that it is bold face type. Click on top of the words "Name of Deceased" and they will be selected. You can tell they are selected because four little "handlebars" appear at the corners of the object. (An object is one of the items shown on the screen, such as deceased, "Date of Birth", etc.)



Now pull-down the Format Menu at the top of the screen by clicking once on it:



When you open the Format Menu, slide the mouse down to highlight the Font choice. Notice that it has an ellipse (...) after it. That means choosing it will bring up more choices. Go ahead and click on it. You will see the Font Dialogue Box.

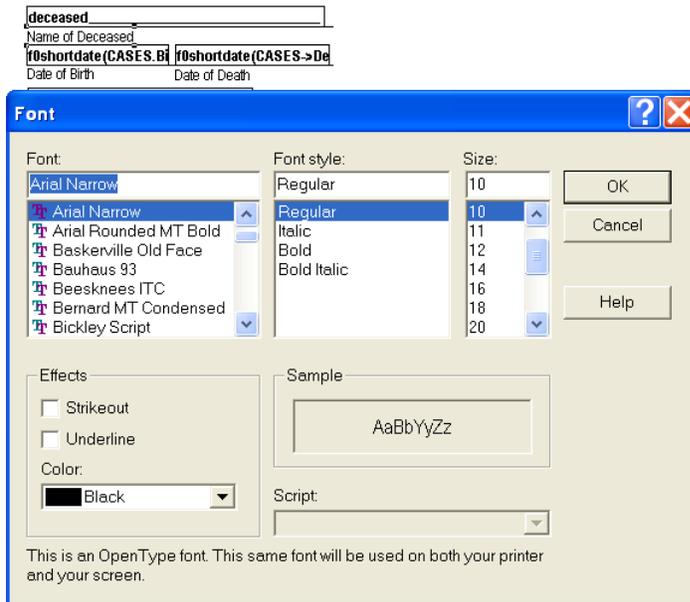


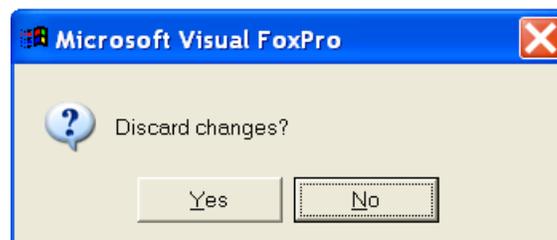
Figure 64 - Font Dialogue Box

There are lots of things about this text object we could change. Each one of them is called a property. For instance the font name could be changed, or the style (regular, italic, bold, bold italic) or we could choose to underline the text, etc. This is just like the font dialogue box in other Windows programs and in fact is a part of Windows, not FoxPro or TerraPro. So if you have used a word processor like Microsoft Word or Word Perfect or Microsoft Works, you probably have used this same box to change fonts.

Let's make a simple change. Click on Bold Italic and then click OK. You will be back at the FoxPro Report Designer and you will see that the caption has changed to look like this: ***Name of Deceased***

Italics make the letters slanted, as you probably were aware. It looks a little strange to have one of the captions in Bold Italics and the others in Regular, but let's take a look at the finished product before we change the other captions.

To save your work, we recommend pressing CTRL-W. This is the fast way to Save and Close at the same time. You could click on File, Save and then File, Close, but why click four times when you can do it all with two keystrokes? Of course, you could just press Escape to indicate you want to leave, and then the program would ask



to which you would have to answer No by clicking on No or pressing N, and then click on File, Save, File, Close anyway. The only time you will use Escape is when you DO NOT want to save your work because you were playing around or made a serious error and want to leave the editing process before things get worse! If you answer Yes to the above question, then none of the

changes we made would be saved and everything would be the way it was. It's kind of nice knowing you have an out when learning new things, isn't it?

If you want to save your work in increments, you can press CTRL-S after making a change that you know is right, then continue making other changes, saving only when you know everything is ok..

**P R E V I E W I N G
Y O U R
C H A N G E S**

You can choose File, Preview to see what your changes will look like BEFORE saving them. This lets you try things without penalty of making a change you don't like.

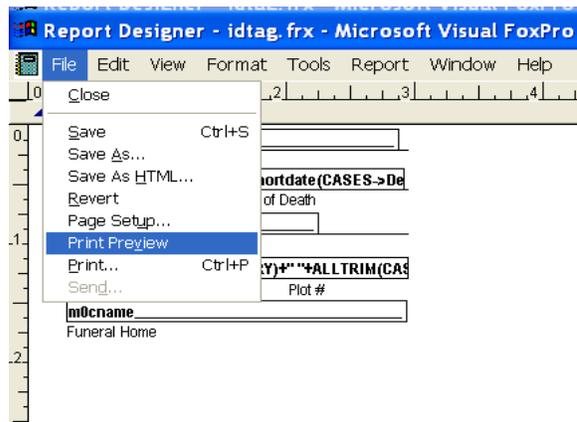
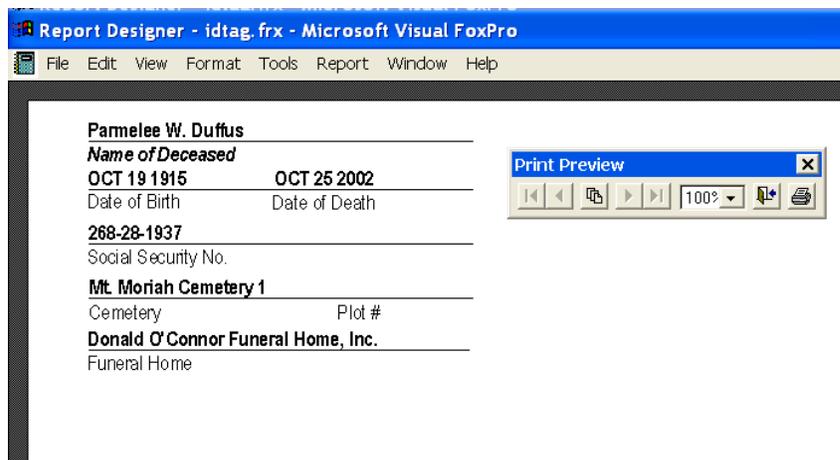


Figure 65 - Previewing before saving

Just like before, click on File, then slide the mouse down to Print Preview and click. You will see a preview of your changes:



This kind of change is called a cosmetic change, because it really doesn't change the data, just the way it looks. It's now up to you to decide if you want all the captions in Bold Italics or revert back to the old way by pressing Escape when in the Report Designer.

WARNING: DO NOT press the Print Icon  shown at the right of the Print Preview box (blue caption with arrows and 100% above). This will cause an ID tag to be printed for everyone in your case file. To end the preview, press ESCape or click on the Exit button 

Let's make another change to this form. Supposing the ID Tag had to be printed with the deceased's last name first, then first and middle, like Doe, John Allen. Or even better, let's say the requirement was that the last name must be UPPER CASE, like DOE, John Allen.

Return to the Modify screen if not already there, following the steps outlined above.

This time, double-click the box with the word deceased in it.

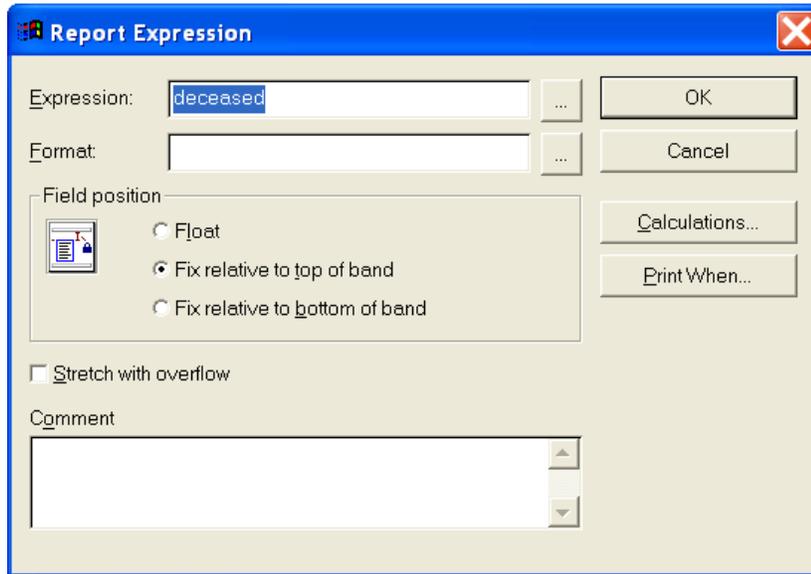


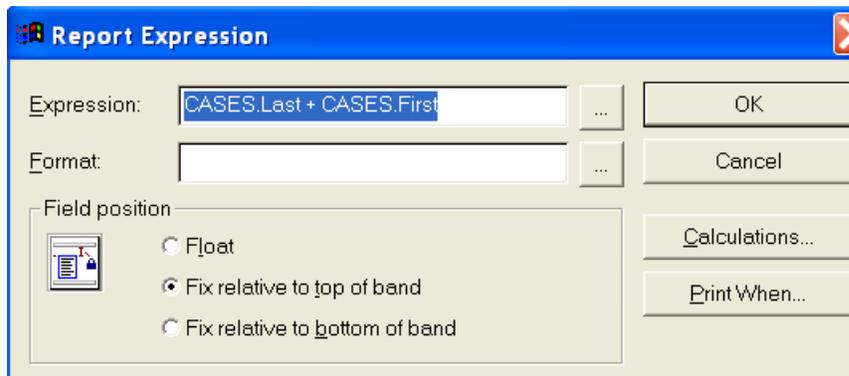
Figure 66 - Report Expression Builder

The Report Expression Builder box allows you to change the data (expression) that will appear on the form. Notice that the word deceased is highlighted. If you start typing from the keyboard, you will replace the word deceased with whatever you type. Type the following: CASES.Last (you can type the capital letters as shown or all lower or upper case, but it makes it easier to understand if you use the convention shown, so please follow it.) Then click on OK and click File, Preview.

Duffus	
<hr/>	
Name of Deceased	
OCT 19 1915	OCT 25 2002
Date of Birth	Date of Death
<hr/>	
268-28-1937	
Social Security No.	
<hr/>	
Mt. Moriah Cemetery 1	
Cemetery	Plot #
Donald O'Connor Funeral Home, Inc.	
Funeral Home	

Now we have just the last name from the CASES file.

Let's add the first name to this. Press Escape to get back to the Report Designer. Double-click the box that now says CASES.Last, and change it to read as below:



Click OK and Preview:

Duffus	Parmelee
<i>Name of Deceased</i>	
OCT 19 1915	OCT 25 2002
Date of Birth	Date of Death
268-28-1937	
Social Security No.	
Mt. Moriah Cemetery 1	
Cemetery	Plot #
Donald O'Connor Funeral Home, Inc.	
Funeral Home	

Not quite what we are after, is it? The problem lies in the way FoxPro Data Tables are set up. When we make a column for Last name or First name, we have to tell FoxPro in advance how many characters we expect the Last name to take up. Obviously, *Bach* is shorter than *Tchaikovsky*, but we have to allow for the longest name we expect to encounter. So we have allowed 15 characters for the last name. Since Duffus is only 6 characters, we have 9 spaces after the last name, then the first name. To show only the name and not all the empty spaces, we TRIM the trailing and leading spaces using a function called ALLTRIM. Functions are little computer programs already in FoxPro or TerraPro that you can use to alter the way data looks. To use a function, state the function name, then surround the data to be altered with parentheses: ALLTRIM(CASES.Last). Edit the box again, changing the data expression as shown in Figure 79:

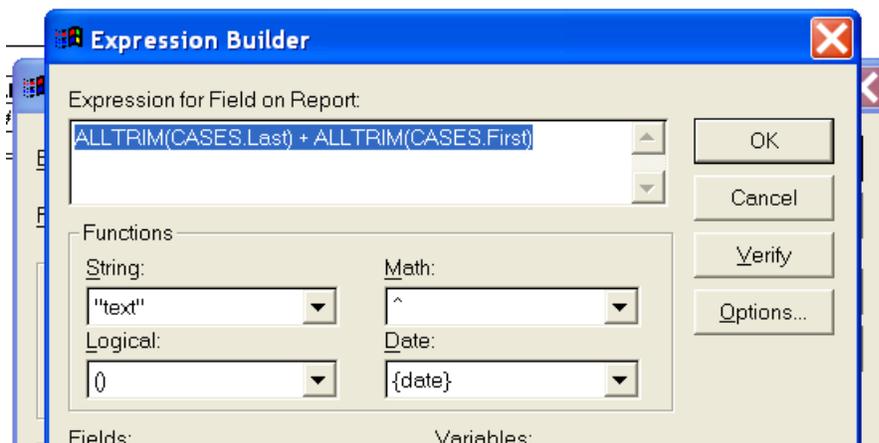


Figure 67 - Expression Builder Detail

Because this expression is too long to see in the box, you can click on the ellipse (...) at the end of the box to open the Expression Builder and see more of what you are typing. Notice we have now told the computer to print the last name (trimmed) plus the first name (trimmed). Click OK and then OK again and then File, Print Preview and let's take a look at what we have done:

DuffusPamelee	
<i>Name of Deceased</i>	
OCT 19 1915	OCT 25 2002
Date of Birth	Date of Death

Whoops! Now we don't even have a space between the last and first names! We can fix that by editing once again. Press ESCape and double-click again on the box we have been editing.

This time we'll do it right. Type the expression as shown below:

```
ALLTRIM(CASES.Last)+", "+ALLTRIM(CASES.First)+" "+ALLTRIM(CASES.Middle)
```

Note the quotation marks – use either single or double quotes, but always use the same for opening and closing. Also note that there is a space after the comma within the quotes because we want a space after the comma when we print Doe, John Allen. All we are doing is adding words and punctuation together, sort of like vocabulary math.

Now this will give you what you want, except for the upper case last name. Fortunately, FoxPro gives us a function for upper case, called UPPER! Edit your expression builder to read as follows:

```
UPPER(ALLTRIM(CASES.Last))+", "+ALLTRIM(CASES.First)+" "+ALLTRIM(CASES.Middle)
```

Be sure to get the correct number of parentheses right. Always match beginning and ending parentheses within an expression. Now click File, Print Preview and here are the results:

DUFFUS, Pamelee W.	
<i>Name of Deceased</i>	
OCT 19 1915	OCT 25 2002
Date of Birth	Date of Death
268-28-1937	
Social Security No.	
Mt. Moriah Cemetery 1	
Cemetery	Plot #
Donald O'Connor Funeral Home, Inc.	
Funeral Home	

Whoopie! We got it right. Now if you like what you have done, you can save it with CTRL-W as we discussed above. Otherwise, press ESCape and don't save changes. The form will be as it was when we started this chapter, and someone else can practice the changes.

It is beyond the scope of this manual to teach EVERYTHING about making forms, but with a little curiosity and snooping around the existing forms, you can pick up a lot of the "tricks of the trade".

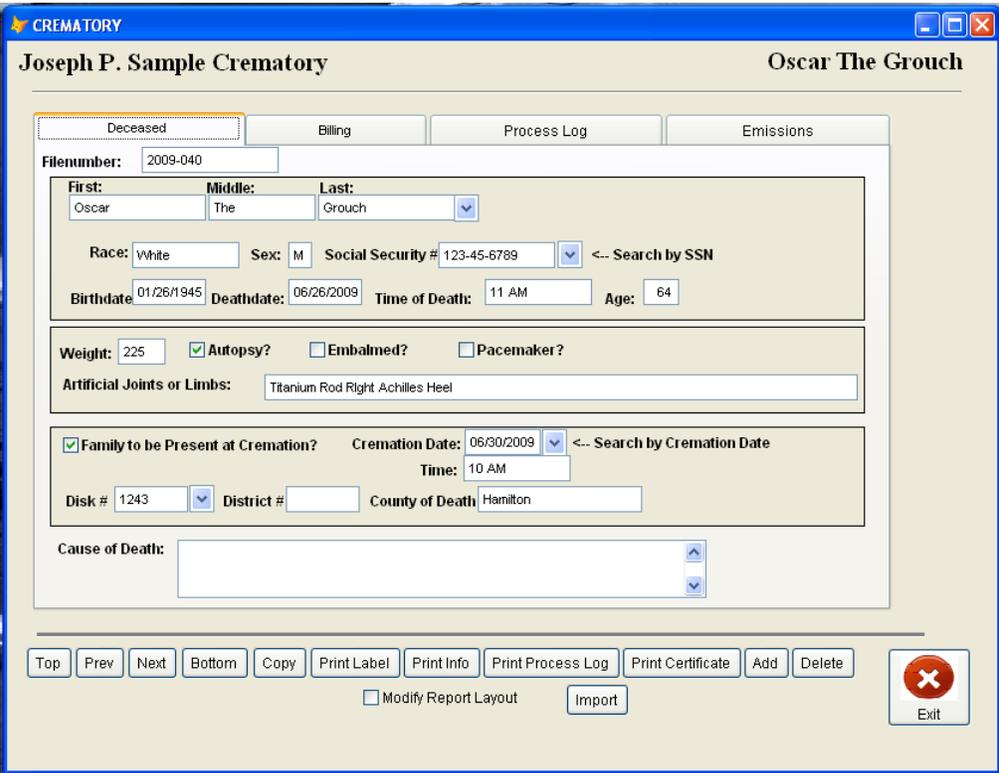
Chapter 12

Crematory

The Crematory module is available as an add-on to TerraPro. A separate company is setup for the crematory cases. A special screen lets you import cases from your other branches, or you may enter cases for cremation cases from other funeral homes. You can then send statements to those funeral homes for the services rendered.

If the crematory module is installed, you will have a menu choice on the TerraPro Main Menu to open the cremation screens:

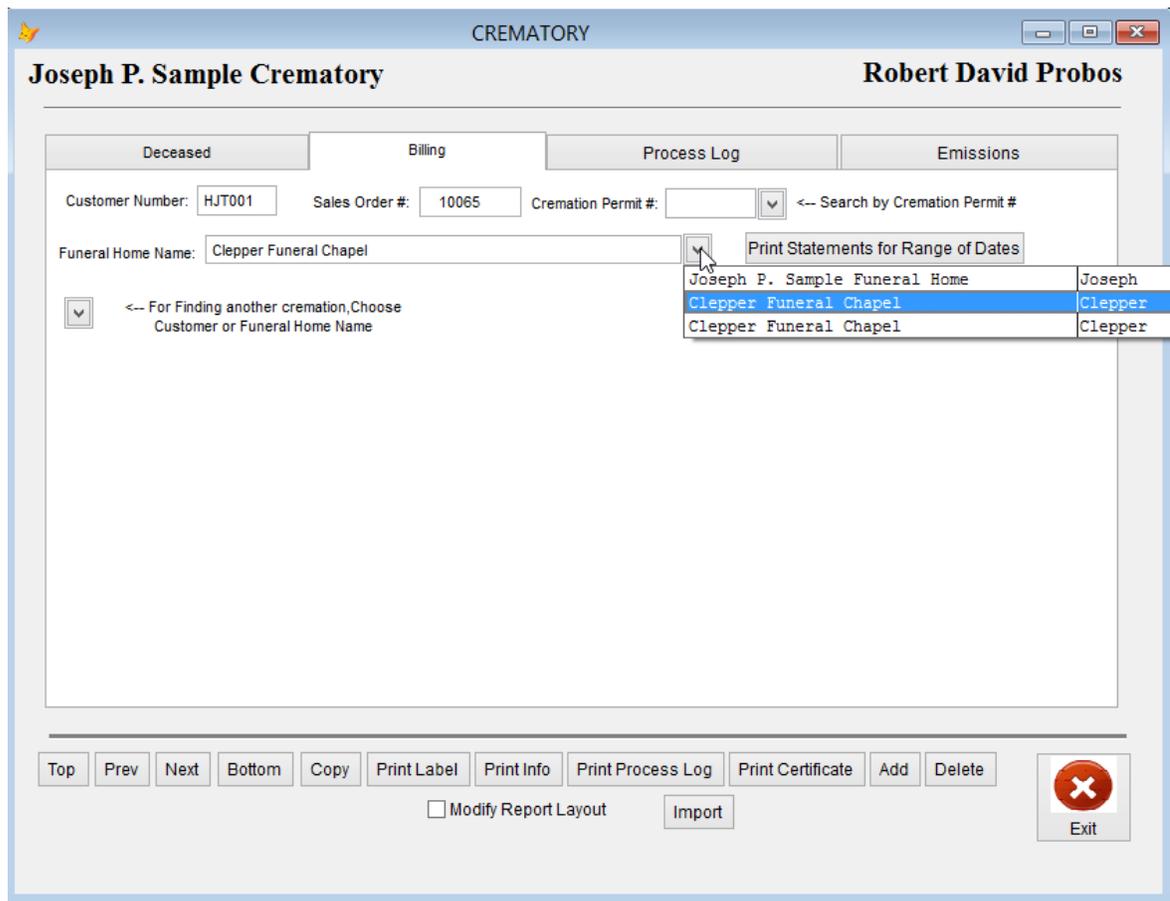
The screen looks like this:



If you have entered the case into TerraPro screens, you can import that data using the Import button. You will be presented with a composite list of all cases for all branches, and you can search by last name by starting to type the last name.

Alternatively, you could enter the information here. However, that will not allow for billing using your price list for the Cremation Company. We recommend entering the case first into TerraPro and assigning a Person Responsible (PR code) for payment. If it is another funeral home, make PR the MAIN relationship, and you will be able to choose from a list of previously used funeral homes.

When it is time to send statements to the funeral homes you serve, go to the billing tab and choose Print Statements for Range of Dates to print all open invoices for those dates.



Utilities

There are lots of other things you can do in TerraPro! Here is a detailed explanation of each of the items on the Utility Menu.

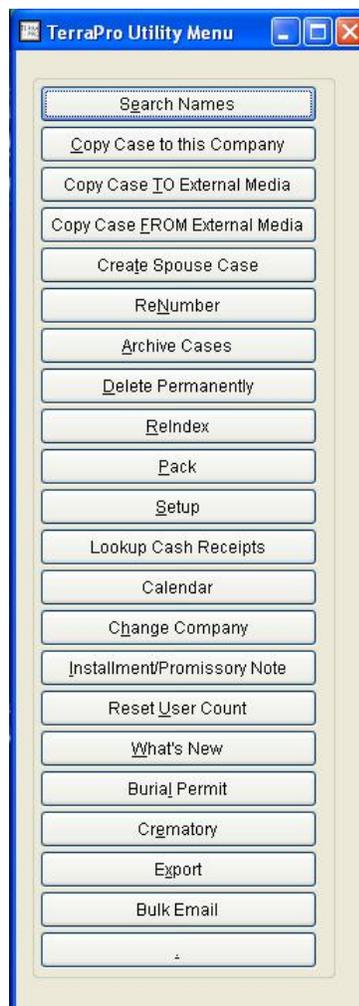


Figure 68 - Utility Menu

Open the Utility Menu by clicking on *Utilities* on the Main TerraPro Menu bar.

We will explore each item on the next few pages.

S E A R C H
N A M E S

What's the good in entering all this data over the years if you can't retrieve it quickly? This utility will let you find names of people or text you might have entered in obituaries or other locations.

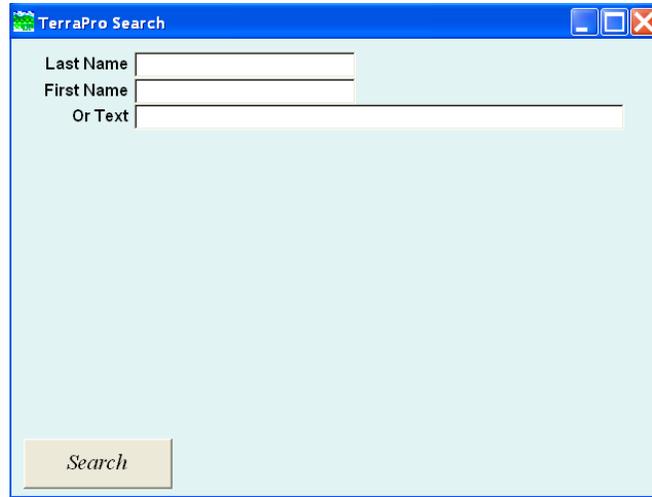


Figure 69 - Search Dialogue Box

If you enter the last or first name of an individual, TerraPro will search for that individual in the survivors file. If you enter Text, you will be asked what text you want to search. Let's try a name. For example, someone may call and say "This is Sarah. You buried my husband a few years ago and I would like to make arrangements for Pre-need." And you can't recall her first name, although you don't want to ask. Just type Sarah into the First Name area, and click *Search*.

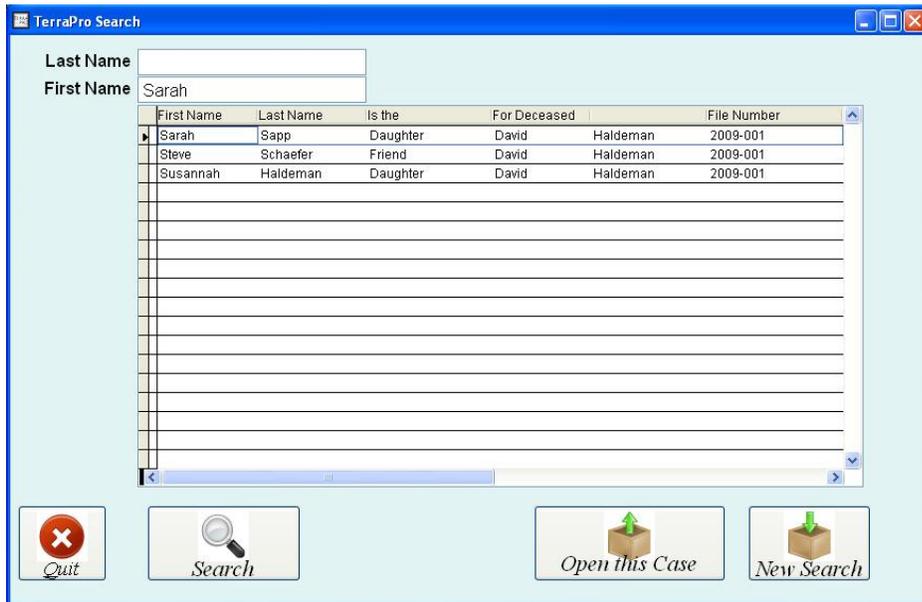


Figure 70 - Name Search Results

Select the correct name by clicking on it and then clicking the *Open this Case* button. Then you can open the case associated with the name you entered, and retrieve data as needed.

**SEARCHING
TEXT**

Wouldn't it be great to have instant recall of any text you ever entered into comments, obituaries, fraternal or memorials areas? You can! Just type the text into the box on the search screen and TerraPro will recall that item and highlight the text using <<highlighted text>> delimiters.

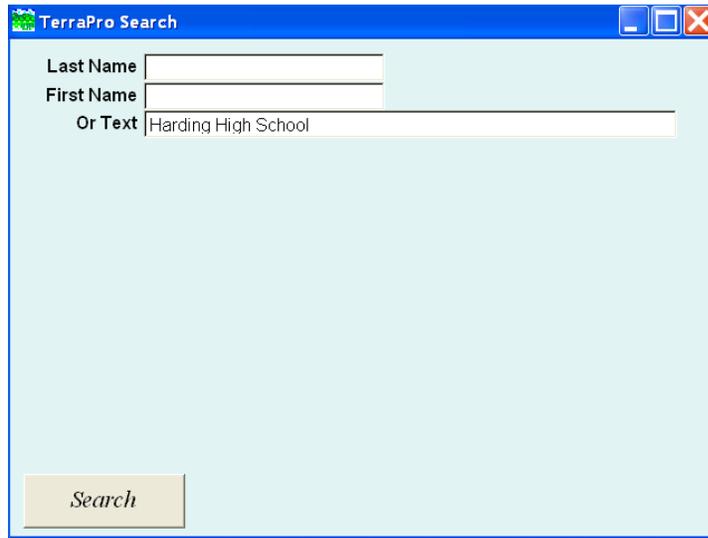


Figure 71 - Searching for Text

Here are the results:

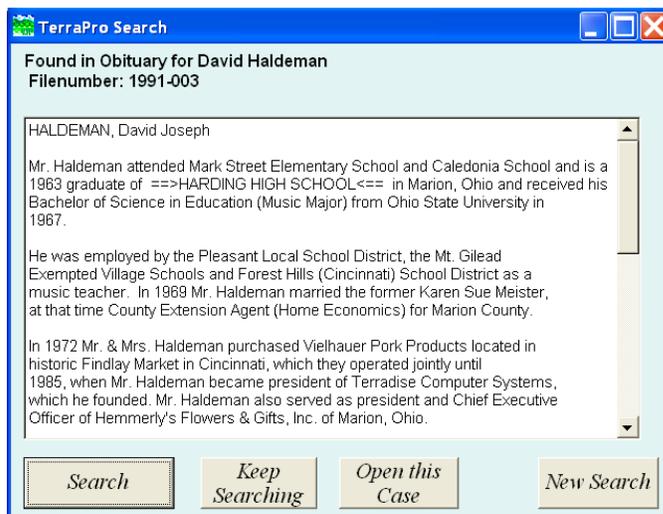


Figure 72 - Search for "Harding High School" Results

If the results shown do not match what you were trying to find, you can click on the Keep Searching Button or start a New Search. Or you can go immediately to this case using the Open this Case Button.

**COPY A CASE
TO THIS
COMPANY**

This function is used mainly when you want to copy a case from Pre-need to At-Need. Clicking on it will bring up the company selection menu (minus the company you are currently in). Use the mouse to point to the Pre-need company (or other branch if copying between branches)

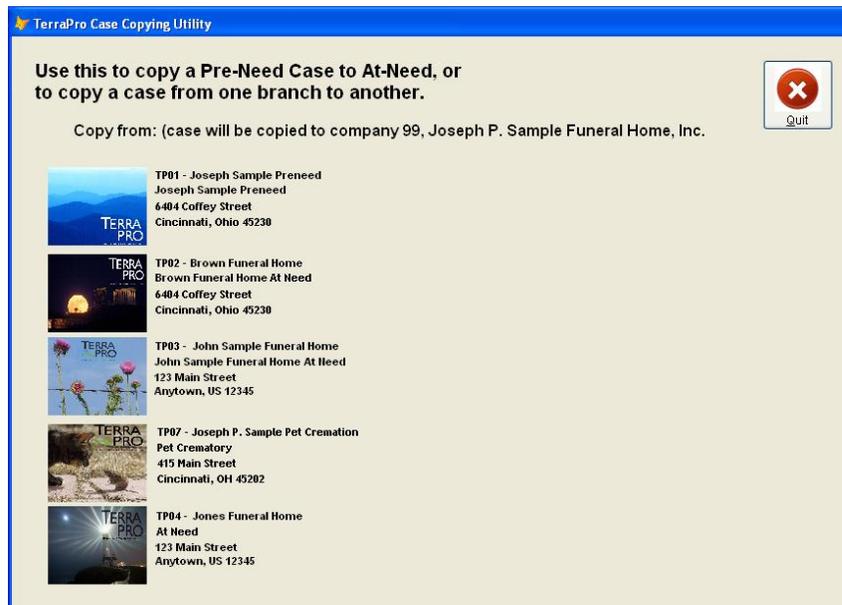


Figure 73 - Branch or Company to Copy FROM

You will be asked to choose a case to copy. Enter a few letters of the last name and TerraPro will find a close match and let you choose:

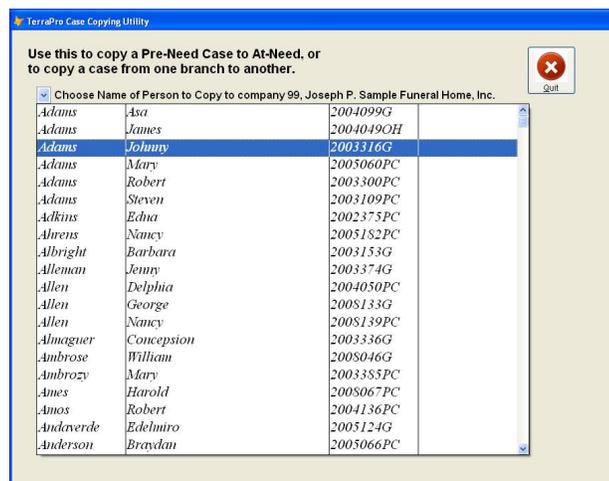


Figure 74 - Choosing a Case to Copy

Or you could right-click to put the list in order by File Number. Choose the right case, then answer the questions presented. TerraPro will automatically assign the next case number, but you can override it if you wish. The case will then be copied into the current company. If you wish for it to remain in the other company as well, answer No when asked if you want it deleted.

**COPY CASE
TO / FROM
EXTERNAL
MEDIA**

This function is used when you need to move a case from one computer to another. For example, you may be using a laptop computer to make arrangements at a nursing home or residence or other location. Feel free to enter the case, then copy it to RAM Drive or a 3.5" floppy disk and take the disk to the office so that the case may be copied into the TerraPro data files. This requires that TerraPro be setup for use on the laptop or other non-networked computer.

TerraPro personnel can do this for you at a nominal cost.

**CREATE
SPOUSE CASE**

This allows you to add a new case for the spouse of someone you previously buried. Family information common to both spouses is copied to save re-entry. Use this option carefully – remember that family information can change in the time since the original spouse died.

RE - NUMBER

Occasionally, your file numbers may need adjusting. This utility quickly re-numbers any file number to another, and checks to make sure you are not duplicating a file number already in existence.

**ARCHIVE
CASES**

Occasionally, your case file may become overly large. After about 6000 to 10,000 cases are entered, the computer may slow to a few seconds refresh time when selecting a case. If you think this may be a problem on your computer, ask TerraPro personnel to create an archive company and move survivors to that company. When needed, the information will be copied from the archive.

**DELETE
PERMANENTLY**

Usually this is used only when a case was entered twice by mistake or when you entered a practice case that needs deleted. Once you have used this function, you will not be able to retrieve the data, so be sure before proceeding.

RE - INDEX

TerraPro uses indexes to keep things in order and provide a quick way to retrieve information. It is possible that these indexes can get damaged, and unexpected results will happen. If you see any errors like “Index does not match database” or other index related problems, try the Re-Index before calling us. This may fix the problem.

Since indexing requires exclusive use of TerraPro data files, you must make sure **NO ONE ELSE HAS TERRAPRO OPEN ON THEIR COMPUTER** before re-indexing.

SETUP

Setup is covered in Appendix B

**MONTHLY
STATEMENTS**

This function allows you to print monthly statements for everyone in the Accounts Receivable List. You are given full control over which bills to print and what billing format to use. You can even print labels or 2 or 3 up statements on special perforated stock.

**INSTALLMENT
PROMISARY
NOTE**

This is a quick way to provide for financing for your clients so that they might pay their bill over time. You can enter the financed amount, the percentage rate and the length of the loan, and then print out an amortization schedule.

WHAT'S NEW

Every version change in TerraPro comes with a listing of the changes made since the last version. It is helpful to read this list to keep up with changes in the program.

**BURIAL
PERMIT**

TerraPro can handle Burial Permit Tracking for Deputy Registrars. This option is extra cost, and can be added to your system upon request.

CREMATORY

If you have purchased the option crematory package for TerraPro, this will allow you to access it.

**. (DOT
P R O M P T)**

This is for TerraPro personnel to use during a *Remote Access Rescue Session* to fix problems. It is not recommended for use unless told to do so or you feel very confident working with FoxPro data files. Internet Remote Support is available 24-7 from TerraPro Staff by clicking the Rescue button on the Main TerraPro Screen. You will be taken to a website where you can enter a 6 digit PIN to allow knowledgeable helpdesk staff to guide you to an answer, or merely fix a problem or add a new form.

Appendix A - Behind the Scenes

You may be curious about how the data in TerraPro is stored and what happens behind the scenes. If not, skip this section!

FoxPro and TerraPro

TerraPro uses Microsoft FoxPro™ to both store data and as a programming language. In fact the name TerraPro reflects the combination of Terradise Computer Systems and FoxPro. This language is used by most of the funeral home software packages available today. The reason is simple: FoxPro provides the best tools for storing, retrieving and presenting data using a language that has its roots in the dBase, an early database language derived from the Jet Propulsion Laboratory Viking Mission data storage system. (If it's good enough for NASA, it will probably do for us!)

If you haven't read Chapter Ten, *Modifying Reports, Forms and Cards*, please do so before continuing. It will greatly enhance your understanding of what is to follow.

The data used in TerraPro is stored in the following data tables: (nn refers to a two-digit number which corresponds to the company number (01, 02, 03, 99 etc)

TPCASEnn.DBF	Vital Statistics about the deceased
TPSURVnn.DBF	Survivor or People Information
TPVETSnn.DBF	Veterans Information
TPMASTnn.DBF	Billing Master File
TPTRANnn.DBF	Billing Transaction File
ARCUSTnn.DBF	Customer File
ARCASHnn.DBF	Cash Receipts File
ARINVTnn.DBF	Price Lists (General, Casket, Vault, Etc.)
TPCREMnn.DBF	Crematory Information File
TPGOODnn.DBF	Goods & Services Description File (one for each default bill)
SYSDATA.DBF	System Setup File
TPDATA.DBF	Data about Data! (Metadata)
TPSTAF.DBF	Staff Information File
TPLOCA.DBF	Hospital, Cemetery Location File
TPRELA.DBF	Relationship Lookup File
TPFORM.DBF	Forms Description File
TPROMP.DBF	Prompts for Screens, Windows
TPVERSE.DBF	TerraPro Card Shop Verse File
TPLETTER.DBF	Letters Description File
TPSTATES.DBF	State Lookup File

SYSTABL.DBF

List of Forms, Reports, Cards

SYSDATA.DBF

When you start TerraPro, the first file opened is SYSDATA.DBF. This file lists all your branches (“companies”) and allows you to choose which one you want to work with. This file records the company number, name, address, tax rate, and many other data items that are unique to this particular branch.

TPDATA.DBF

The table named TPDATA.DBF is where TerraPro gets information about what files to open when TerraPro starts up. It also knows the structure (what data fields are in the file) so that any changes to data fields are made in this file and this file is updated whenever you run the automatic update.

Because you can have up to 99 branches for which you track data, and the data is stored in separate files for each branch, TerraPro assigns a number from 01 to 99 to each branch, and appends the number to the case files name to keep the data separate. When you select which “company” or branch that you want to work with, you are really saying, “Open the files that end in 01 or 02 or 03, etc.”

Some of the files are used by all branches in common, such as the staff listing, the list of forms used, the locations of various nursing homes, hospitals, cemeteries, etc. and other system-wide data.

TPSTAF.DBF

Next, the staff file is opened, in order to provide lists for choosing Funeral Director, Embalmer, Doctors and Clergy. This is a file common to all branches, so when a doctor is used at one branch, he can be selected from another branch without re-entry.

TPLOCA.DBF

The locations file is opened, providing pull-down lists of Cemeteries, Hospitals, Nursing Homes and other locations you have used in the past.

TPRELA.DBF

Knowing the relationships between people are critical in the funeral business. In order to standardize these relationships, a series of two character codes is used. Here is where they are stored.

TPFORM.DBF

The names of the forms you use are stored in this file, along with any commands which tell TerraPro what data is needed to be gathered before the form is printed.

TPROMP.DBF

Because some versions of TerraPro support foreign languages, a method of storing certain prompts and data headings was devised so that the text could be derived for other languages. This file may or may not be used by your version of TerraPro.

ARINVTNN.DBF

Price lists are stored in this file. Each branch can have its own price list.

TPGOOD.DBF

The default bill is stored in this file, and it acts as a template for the other default bills, such as direct cremation or immediate burial, or other package plans.

TPCREM.DBF

If you have the optional crematory program, this file is used for information about the cremains

.

TPVERSE.DBF

This file contains the list of verses or prayers which are printed on memorial folders, prayer cards or other memorial merchandise.

TPLETTER.DBF

The letters you can send to families, contacts or businesses are stored here. Remember that FoxPro can store long text in Memo fields and using special commands, that text can be merged with data.

TPSTATES.DBF

This is a lookup table to assure that you are using the correct abbreviations for the 50 states.

SYSTABL.DBF

Lastly, this file is used to list all the forms and cards in your system. This file is redundant, in that it contains the same data as TPFORM.DBF, so it may go away in future versions of TerraPro.

Each of the above tables has many fields of data within the file. To see a complete description of the data stored in it, run the Data Dictionary Report on the Reports List. (If you do not have this report, please contact us at 513-484-9729)

Modify (Browse) Billing Format

Back in Chapter Eight, Price Lists, you were told you could setup a wide variety of billing formats for Direct Cremation, Immediate Burial etc. There is a button on that setup screen (Choose Price Lists from the Main TerraPro Menu, then Edit Default Bill) as shown below:

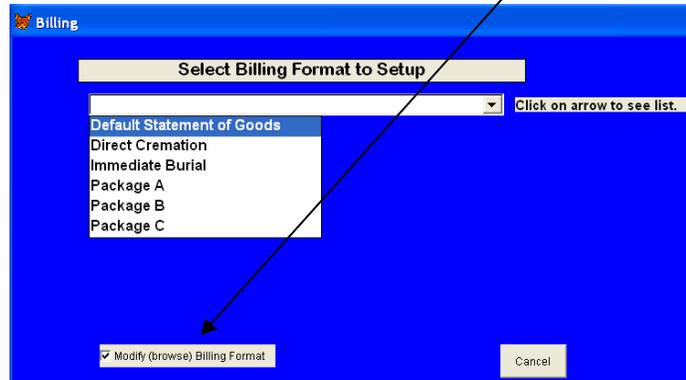


Figure 75 - How to modify bill to allow description edit

When you have the checkbox checked, and then select a billing format to modify, you will be presented with the following browse of data: (it has been scrolled down to show the pertinent items)

Group	Descrip
1T	TOTAL SERVICES SELECTED
2H	2. ALTERNATIVE SERVICE SELECTION
2H	(As per General Price List)
2G	Immediate Burial
3H	3. MERCHANDISE SELECTED
3H	Casket
3G	
3H	Vault
3V	
3	Acknowledgment Cards
3	Visitors Register
3	Memorial Cards (per 50)
3	Crucifix or Cross
3	Prayer Cards (per 100)
3	
3G	
3G	
3G	
3Z	Total Merchandise Selected
3T	Sales Tax
4H	4. CASH ACCOMMODATION ITEMS
4	Certified Copies of Death Certificate
4	Clergy
4	Cemetery/Crematory Charges
4	Newspaper Notices
4G	Flowers
4G	Music
4G	
4G	

Figure 76 - Browsing the Default Bill File

Pay close attention to the left hand column labeled Group. This is the key to how items are grouped on your bills. Notice that some of the items have a C, V, G, H, T or Z after the group number. This is a code to allow TerraPro to decide how to format the items when they appear on the editing screen. C is reserved for the casket line, V for the vault. Headers are identified with an H. Lines that total the lines in the group have a Z, and sales tax is reserved with T. That leaves G, which stands for Get description. If you put an Upper Case G (not g) after the number, you will be able to edit the description. You may wish to explore other parts of this browse, and if you have further questions, TerraPro personnel will be happy to answer them.

Appendix B - Setting up Companies

TerraPro personnel will setup your companies. For further information, call us and make notes on this page.

Occasionally, you may need to change some aspect of your setup, such as Sales Tax Rate, or company address or finance charge rate.

To reach the setup screen, use the Utility Menu on the Main TerraPro Screen and choose Setup. You will be setting up information for the currently opened company only, so if changes need to be made to all branches, you will have to repeat these steps.

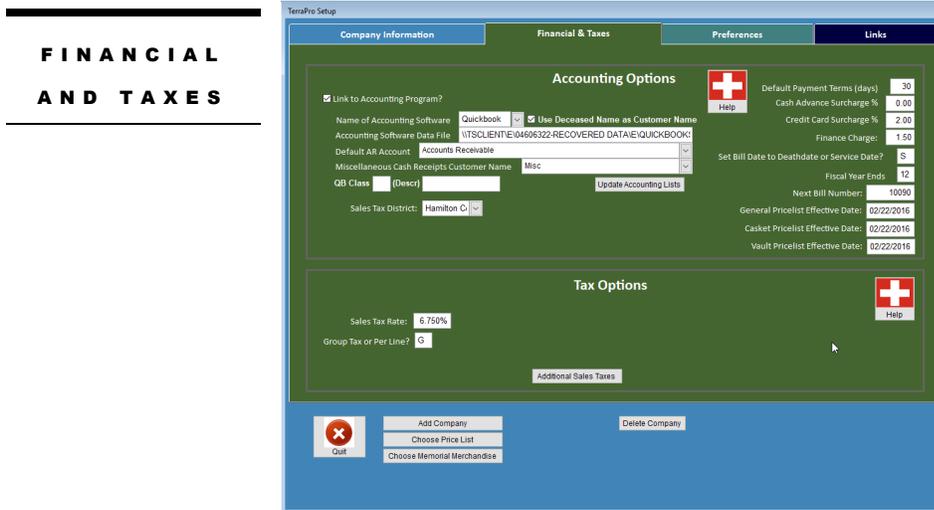
The screenshot shows the TerraPro Setup interface with the following fields and options:

- Company Information:**
 - Name of Company: Joseph P. Sample Funeral Home, Inc.
 - Address: 6404 Coffey St., Coalinga, KY 41040
 - Country: [Blank]
 - Phone: 513-484-9729 | FAX: 901-761-4028
 - Branch Name(s): Sample Data
 - Company email: haldemanda@d@gmail.com
 - Company website: https://terradise.net
 - Funeral Home License #: [Blank]
- Company Defaults:**
 - Default City: Cincinnati
 - Default State: OH
 - Default Postal Code: 45238
 - Default County: Hamilton
 - Registrar #: SC325
- Buttons:** Add Company, Delete Company, Choose Price List, Choose Memorial Merchandise, Quit, and Help icons.

Figure 77 - Setup Editing Screen

COMPANY INFORMATION

Most of these items are critical to the way TerraPro behaves, so use care in editing this screen. Your **funeral home name** is licensed to you and cannot be changed except by TerraPro personnel. The **address** and **phone, company email and website** may be changed at will. **Branch name** lets you call different branches by the familiar names by which you refer to them. The **default City/State/County and ZIP** are what will appear by default as you enter survivors or other data. The **registrar #** can be filled in if you are a deputy registrar for purposes of filing death certificates or other papers.



Link to Accounting Program allows you to export customer and invoice detail to your accounting program. You must first setup your accounting program with the items you are selling and transfer their descriptions to TerraPro, using the Pricelist Editing Screens.

Choose which accounting program you are using by pulling down the list and selecting with the mouse. TerraPro currently supports linking to QuickBooks and Xero only. See Page 68 for setup instructions.

Default Payment Terms: Although you can extend terms to any individual contract, these establish the normal or default terms.

Credit Card Surcharge percentage you want to add to total bill to compensate for using credit card.

The **Finance Charge** rate per month is entered here. If you never charge finance charges, enter 0.00. (18% per annum would be entered as 1.50 (1.5 times 12 = 18%)).

Calculate Tax Per Line should be set to L. It is possible in some circumstances to change this to G, which means to calculate tax on the Total of all taxable items, but most funeral homes now use itemized bills, showing the tax charged on each item.

Set Bill Date to death date or Service Date according to your policies.

Fiscal Year Ending Date is used merely to inform you of your preference.

Next Bill Number is the internal billing number to be assigned next. Do not change unless instructed by TerraPro personnel.

Pricelist Effective Date may or may not be referenced on your forms. See TerraPro personnel to determine whether this is used. It is usually part of the Topline Memo asked for when you print the price lists.

Sales Tax Rate is your local sales tax rate. If funerals are not taxed in your state, this must be set to 0.00. Additional sales tax tables may be created if your business is subject to them.

Group Tax or Tax by Line is used in the calculation of sales tax. If G (Group) is chosen, then all taxable items are added up and then multiplied by the tax rate. If L (per Line) is chosen, tax is calculated on each item, and then the taxes are added together.

PREFERENCES

TerraPro Setup

Company Information | Financial & Taxes | Preferences | Links

Security

Use Passwords?

Backup Interval (Days):
Timeout Interval (Minutes):
Billing Timeout (Minutes):

Appearance

List Cases by Filenumber or Deathdate? (F/D) Double Click Speed

Date Format:

Capitalize Proper Names even if entered ALL UPPER or all lower case:

File Number Format: Last File Number Used:

Language:

Help Desk

Show Tip of the Day at startup

TerraPro Help Phone/email:

Quit | Add Company | Choose Price List | Choose Memorial Merchandise | Delete Company

Use Passwords allows you to lock out certain sensitive portions of the program using a two level password system. This may not be fully implemented in your version of TerraPro.

Backup Interval in days. TerraPro automatically creates a ZIP file of your data when you exit. How often this occurs is controlled by this setting. You can also force a backup on the Utility Menu. You should then backup the file C:\TERRAPRO\VTPBACKUP.ZIP to a ZIP drive, RAM Disk, CDR or other removable storage media. (On older installations, the TerraPro folder is C:\VTP)

Timeout Interval determines whether the system will automatically exit the TerraPro program after a certain number of minutes without mouse movement.

Billing Timeout closes the billing screen only after the number of minutes of idle time.

File Number Format allows you to setup your file numbering scheme. The suggested format is something like 2021-040 for the 40th case in the year 2021. But other schemes are possible. Here are the rules for the File Number Format template:

YYYY – year – this will remain constant until changed each new fiscal year.

nnn – consecutive number. TerraPro will automatically increment this part of the file number as each new case is added. (This can be as many digits as required to handle your funeral home's annual funeral count.)

CC – any character

Last File Number Used lets you reset the file number in case the automatic file numbering becomes misaligned.

LINKS

The screenshot shows the TerraPro Setup application window. At the top, there are tabs for 'Company Information', 'Financial & Taxes', 'Preferences', and 'Links'. The 'File Location Setup' section includes a dropdown menu for 'Update Website Obits from TerraPro?' with options: 'Most Interactive WordPress', 'CFS', 'FrontRunner', 'Volve', 'Tributes', and 'ASD'. Below this are input fields for 'Data File Drive\Folder:', 'System File(s) Drive\Folder:', and 'Alternate Card Shop Data Folder:'. There is also a 'Laptop Installation:' checkbox. The 'eMail Setup' section has a checkbox for 'Send e-Mails from TerraPro?'. It includes input fields for 'Email Server (Example: smtp.yourIP.net)', 'SMTP User Name', and 'Password', along with a 'Port (usually 25)' field set to '25'. At the bottom, there are buttons for 'Add Company', 'Delete Company', 'Choose Price List', and 'Choose Memorial Merchandise', along with a 'Quit' button with a red 'X' icon. A 'Help' icon is visible in the top right of both sections.

Email

Update Website Obits Your website can be updated with case and service information. Choose the website provider from the drop down list, and fill in appropriate linking information provided by TerraPro or your web host.

Data File Drive / Directory should NEVER be changed – you will lose contact with your data! It should read C:\TERRAPRO on single user systems, or indicate the drive letter of a shared drive on a network system (usually T:) Optionally, it can be left blank as it will use the data files in the same folder where TerraPro is installed.

CardShop Data Folder is used for determining where the CardShop will store it's copies of the cards you print. This can be useful for later archiving or deleting of these files, which store information about each card you print.

Send e-Mails from TerraPro? If you have purchased the optional email add-on.

Server is for using TerraPro's Obituary Email Utility. You will also need to know your user account and password. This can be obtained from your Internet Provider or by inspecting the settings in Microsoft Outlook.

When you finish making changes or reviewing this screen, you will be asked if you want to **Update System File**. If you have made changes, say Y for Yes, or N for No if just looking.



Appendix C - Expression Listing

This list is only a sample of the many expressions available in TerraPro. Some are FxoPro expressions and others are exclusive to TerraPro. Use 'em!

(This list is for reference only – use right-click when editing letters or Modifying Obituary Format to see the list and automatically type the expression for you)

```

Age in Days (if under 1 year)..... IIF(CASES.AGE < 1,Daysold,'')
Age in Months (if under 1 year)..... IIF(CASES.AGE < 1,Monthsold,'')
Age in Years..... CASES.AGE
Armed Services - puts XX if NOT member..... IIF(CASES.Armedserv='N','XX',' ')
Armed Services - puts XX if member..... IIF(CASES.Armedserv='Y','XX',' ')
Attorney - Address + Street..... f0address (SURVIVORS,AT)
Attorney - City, State ZIP..... f0csz (SURVIVORS,AT)
Attorney - Name..... f0name (SURVIVORS,AT)
Attorney - Phone Number(s)..... f0phone (SURVIVORS,AT)
Branch of Service = XX if Air Force..... IIF (UPPER (VETERANS.Branch)='AIR FORCE','XX','')
Branch of Service = XX if Army..... IIF (UPPER (VETERANS.Branch)='ARMY','XX','')
Branch of Service = XX if Coast Guard..... IIF (UPPER (VETERANS.Branch)='COAST
GUARD','XX','')
Branch of Service = XX if Marines..... IIF (UPPER (VETERANS.Branch)='MARINES','XX','')
Branch of Service = XX if Navy..... IIF (UPPER (VETERANS.Branch)='NAVY','XX','')
Branch of Service = XX if Other..... IIF (UPPER (VETERANS.Branch)='O','XX','')
Business of Deceased..... ALLTRIM(CASES.BUSINESS)
Casket Price (number may vary with price list..... getbillitem(35,'price')
Cemetery - Grave Number..... ALLTRIM(CASES.Grave)
Cemetery - Lot Number..... ALLTRIM(CASES.Lot)
Cemetery - Lot Owner..... ALLTRIM(CASES.Lotowner)
Cemetery - Section..... ALLTRIM(CASES.Section)
Cemetery Location (City, State)..... ALLTRIM(CASES.LOCATION)
Cemetery Name..... ALLTRIM(CASES.CEMETERY)
Cemetery Name, City, State..... TRIM(CASES.Cemetery)+' , '+TRIM(CASES.Location)
Certified Copies - Qty Ordered..... ALLTRIM(STR(INT(getbillitem(50,'qtyord'))))
Certifier - Doctor's Name and Address..... f0name (SURVIVORS,CE)+ '
'+f0address (SURVIVORS,CE)+'
'+f0csz (SURVIVORS,CE)
Citizenship..... ALLTRIM(CASES.Citizenshp)
City of Death..... ALLTRIM(CASES.Citydeath)
City of Residence - Deceased..... f0city (SURVIVORS,SE)
City, Locale or Twp for Death Certificate..... f0twp (SURVIVORS,SE)
Clergy Name - 1st Clergy..... f0name (SURVIVORS,C1)
Clergy Name - 2nd Clergy..... f0name (SURVIVORS,C2)
Comments - Line 1..... MLINE (CASES.Comments,1)
Comments - Line 2..... MLINE (CASES.Comments,2)
Comments - Line 3..... MLINE (CASES.Comments,3)
County of Death..... ALLTRIM(CASES.Cntydeath)
County of Residence - Deceased..... f0county (SURVIVORS,SE)
Date of Birth - long form (January 26 1945)..... f0longdate (CASES.Birthdate)
Date of Birth - short form (JAN 26 1945)..... f0shortdate (CASES.Birthdate)
Date of Burial - Long Form (January 29 1994)..... f0longdate (CASES.Burialdate)
Date of Burial - Short Form (JAN 29 1994)..... f0shortdate (CASES.Burialdate)

```

Date of Death - long form (January 26 1994)..... f0longdate (CASES.Deathdate)
Date of Death - short form (JAN 26 1994)..... f0shortdate (CASES.Deathdate)
Date of Funeral Service (as entered)..... ALLTRIM (CASES.Service)
Date-Today - long form like January 10, 1994..... f0longdate (DATE ())
Date-Today - short form (JAN 10, 1994..... f0shortdate (DATE ())
Deceased's Birthplace (City, State)..... TRIM (CASES->Cityborn)+IIF (.NOT.
EMPTY (CASES.Statborn),', '+TRIM (CASES->
Statborn),'')
Deceased's Date of Birth (Numbers)..... CASES.Birthdate
Deceased's Date of Burial (Numbers)..... CASES.Burialdate
Deceased's Date of Death (Numbers)..... CASES.Deathdate
Deceased's Name / First Middle Last..... deceased
Deceased's Name / First, Middle, LAST Upper..... ALLTRIM (CASES.First)+
IIF (EMPTY (CASES.Middle),'', +
ALLTRIM (CASES.Middle))+' ' +ALLTRIM (UPPER (CASES.Last))
Deceased's Name / Last, First Middle ALLTRIM (CASES.Last)+, +ALLTRIM (CASES.First)+
+ALLTRIM (CASES.Middle)
Deceased's Residence (Address)..... f0address (SURVIVORS,SE)
Deceased's Residence (City, State ZIP)..... f0csz (SURVIVORS,SE)
Deceased's Residence (Street)..... f0street (SURVIVORS,SE)
Deceased's Residence - State Only..... f0state (SURVIVORS,SE)
Deceased's Residence - ZIP Code Only..... f0zip (SURVIVORS,SE)
Deceased's State of Death..... ALLTRIM (CASES.Statdeath)
Disposition..... ALLTRIM (CASES.Disposal)
Education Level of Deceased - Primary..... ALLTRIM (CASES.PRIMARY)
Education Level of Deceased - Secondary..... ALLTRIM (CASES.SECONDARY)
Embalmer's FAX (function can call any field)..... f0field (STAFF,CASES.Embalmer,FAXPHONE)
Embalmer's License Number..... f0license (STAFF,CASES.EMBALMER)
Embalmer's Name..... f0name (STAFF,CASES.EMBALMER)
Father of Deceased..... f0name (SURVIVORS,FA)
Filenumber..... ALLTRIM (CASES.Filenumber)
Flag Form Remarks - Line 2..... f0memo (VETERANS.Flagremark,5,85,2)
Flag Recipient - Address, Street..... f0address (SURVIVORS,VETERANS.Flagrecip)
Flag Recipient - City, State ZIP..... f0csz (SURVIVORS,VETERANS.Flagrecip)
Flag Recipient - Name..... f0name (SURVIVORS,VETERANS.Flagrecip)
Flag Recipient - Relationship to Deceased..... f0relation (VETERANS.Flagrecip)
Funeral Director's Name..... f0license (STAFF,CASES.DIRECTOR)
Funeral Home Address (Line 1)..... ALLTRIM (SUBSTR (SYSDATA.ADDRESS,1,35))
Funeral Home City, State ZIP..... ALLTRIM (SUBSTR (SYSDATA.ADDRESS,36,35))
Funeral Home Name..... m0cname
Informant FAX (function can call any field)..... f0field (SURVIVORS,IN,FAXPHONE)
Informant's Address and City, State ZIP..... f0address (SURVIVORS,IN)+
+f0csz (SURVIVORS,IN)
Informant's Name..... f0name (SURVIVORS,IN)
Informant's ZIP Code..... f0zip (SURVIVORS,IN)
Inside City Limits? Prints Yes, No or Unknown
..... IIF (UPPER (CASES.Inside)=Y, Yes, IIF (UPPER (CAS
ES.INSIDE)=N, No, Unknown))
Marital Status..... ALLTRIM (CASES.Marital)
Memorials..... ALLTRIM (CASES.Memorials)
Mother of Deceased..... f0name (SURVIVORS,MO)
Obituary..... f0memo (CASES.Obituary)
Occupation of Deceased..... TRIM (CASES.OCCUPATION)
Origin - Puts X if Hispanic..... IIF (.NOT. EMPTY (CASES.ORIGIN), 'XX', ' ')
Origin - Puts X if NOT Hispanic..... IIF (EMPTY (CASES.ORIGIN), 'X', '')
Origin of Deceased (Hispanic Origin)..... ALLTRIM (CASES.ORIGIN)
Person Responsible - Address + Street..... f0address (SURVIVORS,PR)
Person Responsible - City, State ZIP..... f0csz (SURVIVORS,PR)
Person Responsible - Name..... f0name (SURVIVORS,PR)
Person Responsible - Phone Number(s)..... f0phone (SURVIVORS,PR)
Phone Number - Home Only - Informant..... f0phone (SURVIVORS,IN,.t.)
Phone Number - Work Only - Informant..... f0workphone (SURVIVORS,IN)
Phone Number(s) - Attorney..... f0phone (SURVIVORS,AT)
Phone Number(s) - Certifier (Doctor)..... f0phone (SURVIVORS,CE)
Phone Number(s) - Clergy/Church..... f0phone (SURVIVORS,C1)
Phone Number(s) - Clergy/Church (2nd)..... f0phone (SURVIVORS,C2)
Phone Number(s) - Informant..... f0phone (SURVIVORS,IN)
Phone Number(s) - Person Responsible..... f0phone (SURVIVORS,PR)
Phone Number(s) - Person Responsible..... f0phone (SURVIVORS,PR)
Phone Number(s) - Spouse..... f0phone (SURVIVORS,SP)
Place of Death - Name of Facility..... ALLTRIM (CASES.Institute)
Place of Death - Puts X if Dead on Arrival..... IIF (UPPER (CASES.Placdeath)='DOA', 'X', ' ')
Place of Funeral Service..... ALLTRIM (CASES.Place)
Race of Deceased..... ALLTRIM (CASES.RACE)
Relationship of Deceased to Niece..... f0relation (NC,,.t.)
Relationship of Informant to Deceased..... f0mainrelation (IN)

Sex - Print Male or Female..... IIF (UPPER (CASES.Sex)='M',Male,Female)
Social Security Number..... ALLTRIM (CASES.SSN)
Spouse's Name (maiden name if male deceased)
..... IIF (SUBSTR (CASES.Marital,1,1)='M',IIF (CASES
.Sex='M',f0name (SURVIVORS,WM),f0name (SURVIVORS,SP)),None)
Spouse's Social Security Number..... ALLTRIM (CASES.SpouseSSN)
State - First Funeral Director..... f0state (STAFF,F1)
State of Residence - Deceased..... f0state (SURVIVORS,SE)
Time of Death..... ALLTRIM (CASES.timedeath)
Time of Funeral Service..... ALLTRIM (CASES.Timeservic)
Title for Clergy 1 (Rev., Father, etc)..... f0title (SURVIVORS,C1)
Vault - Container - Outer Burial Container..... ALLTRIM (CASES.Vault)
Veteran's Branch of Service..... ALLTRIM (VETERANS.Branch)
Veteran's Date of Entry into Service (numbers)..... VETERANS.Entrydate
Veteran's Date of Exit from Service (numbers)..... VETERANS.Exitdate
Veteran's Discharge Status (Honorable or Dis-..... ALLTRIM (VETERANS.Discharge)
Veteran's Flag Recipient..... f0name (SURVIVORS,FL)
Veteran's Organization..... ALLTRIM (VETERANS.Organizati)
Veteran's Place of Entry into Service..... ALLTRIM (VETERANS.Entryplace)
Veteran's Place of Exit from Service..... ALLTRIM (VETERANS.Exitplace)
Veteran's Rank..... ALLTRIM (VETERANS.Rank)
Veteran's Service = XX if Armed Services..... IIF (UPPER (VETERANS.Vetservice)='A','XX','')
Veteran's Service = XX if Korea..... IIF (UPPER (VETERANS.Vetservice)='K','XX','')
Veteran's Service = XX if Spanish American..... IIF (UPPER (VETERANS.Vetservice)='S','XX','')
Veteran's Service = XX if Vietnam..... IIF (UPPER (VETERANS.Vetservice)='V','XX','')
Veteran's Service = XX if WW I..... IIF (UPPER (VETERANS.Vetservice)='1','XX','')
Veteran's Service = XX if WW II..... IIF (UPPER (VETERANS.Vetservice)='2','XX','')
Veteran's Service Serial Number..... ALLTRIM (VETERANS.Servicesn)
Veteran's VA File Number..... ALLTRIM (VETERANS.Vafilenum)
Veteran's War or Period of Service..... f0vetservice (VETERANS.Vetservice)
Visitation Days and Times..... ALLTRIM (CASES.Visitation)
Words - Funeral Director..... Funeral Director
ZIP - First Funeral Director..... f0zip (STAFF,F1)
ZIP - Informant..... f0zip (SURVIVORS,IN)

Appendix D - Supplemental Screens

FLIGHT INFORMATION

You can enter information about flight schedules complete with notes for the attendant accompanying the body to the airport. Having this information handy with the case information can avoid confusion about schedules.

The screenshot shows a software window titled "Flight" with a blue title bar. The main content area is titled "Flight Information" and contains the following fields:

- Leg:** 1
- Flight #:** 1564
- Airline:** Delta
- Depart Day & Time:** 09/30/2006 12:00:00 AM
- Depart Airport:** DAY (dropdown) James M. Cox Dayton Int'l Airport, Dayton OH
- Arrival Day & Time:** 09/30/2006 12:00:00 AM
- Arriveair:** ATL (dropdown) Atlanta-Hartsfield-Jackson International Airport, Atlanta GA
- Prepaid:**
- Notes:** Have casket at airport by 11 PM Saturday September 29.

At the bottom of the window, there is a row of navigation buttons: Top, Prev, Next, Bottom, Find, Print, Add, Edit, Delete, and Exit.

A complete database of all airports in the world is included with this feature. The schedule can be printed:

Joseph P. Sample Funeral Home, Inc.

6404 Coffey St
Cincinnati, Ohio 45230

Flight Schedule

Name of Deceased: David Joseph Haldeman

First Leg

Have casket at airport by 11 PM Saturday September 29.

Airline: Delta Flight # 1564 Prepaid

Depart: DAY - James M. Cox Dayton Int'l Airport, Dayton OH
Saturday 09/30/2006 12:00:00 AM

Arrive: ATL - Atlanta-Hartsfield-Jackson International Airport, Atlanta GA
Saturday 09/30/2006 12:00:00 AM

Second Leg

Airline: Delta Flight # 1062 Collect

Depart: ATL - Atlanta-Hartsfield-Jackson International Airport, Atlanta GA
Saturday 09/30/2006 12:00:00 AM

Arrive: SRQ - Sarasota-Bradenton International Airport, Sarasota/Bradenton FL
Saturday 09/30/2006 12:00:00 AM

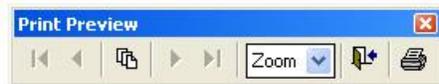
Third Leg

Please make sure they get the casket off the plane in Botswana

Airline: Botswana Flight # 2289 Prepaid

Depart: SRQ - Sarasota-Bradenton International Airport, Sarasota/Bradenton FL
Monday 10/01/2007 12:00:00 AM

Arrive: QDD - , Botswana
Tuesday 10/02/2007 12:00:00 AM



FLORAL TRIBUTES

As an added service for your families, digital photos of the flowers can be taken and recorded within TerraPro. A list of the tributes, complete with photos can then be given the family for acknowledging the expressions of sympathy.

TerraPro Floral Tribute Screen

Floral Tributes for David Joseph Haldeman File Number: 2007-850

Description: Fresh Flowers in Basket

Sender(s): George, Randy, Kim, Harry and Marty Smith

Florist: Jack Herb Florist

Photo: C:\TERRAPRO\IMAGES\FLOWERS\FTD LOVING REMEMBRANCE.JPG

Top Prev Next Bottom Find Print Add Edit Delete Exit

04/22/2008 11:27:53 AM Page 1 2007-850

Floral Tributes for David Joseph Haldeman

From: Joyce Van Wye

Fresh Flowers in Vase
Hemmerly's Flowers and Gifts

From: Hodapp Funeral Home

Divinity Basket
Jack Herb

From: The staff at Hemmerly's Flowers
Red Roses and Camations

Standing Spray
Hemmerly's Flowers

From: George, Randy, Kim, Harry and Marty Smith

Fresh Flowers in Basket
Jack Herb Florist

Print Preview

CHECKLIST

A checklist of to-dos and tasks can be printed for staff to use. Clicking the checkbox will indicate the task needs done for this case. When the task is completed, Double-Click the *Completed By* column. The user and date and time completed will be filled in automatically. You can edit this if desired.

This checklist can be modified by right-clicking items to change their descriptions.

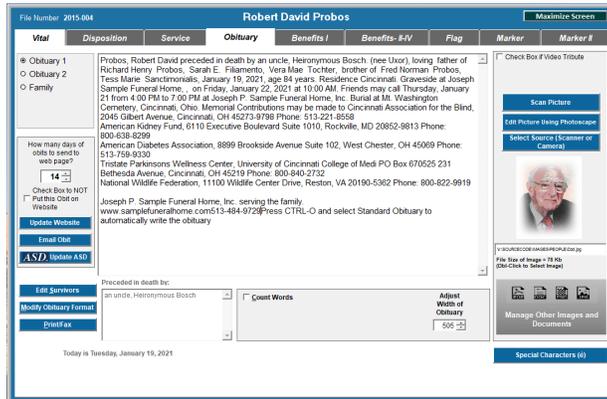
You can change the descriptions at the top of the form by right clicking on them. For example right-clicking the “Creative Concept” description allows you to enter a different item:

If you want to save this description for future cases, click the button labeled “*Save these Items as Default*”.

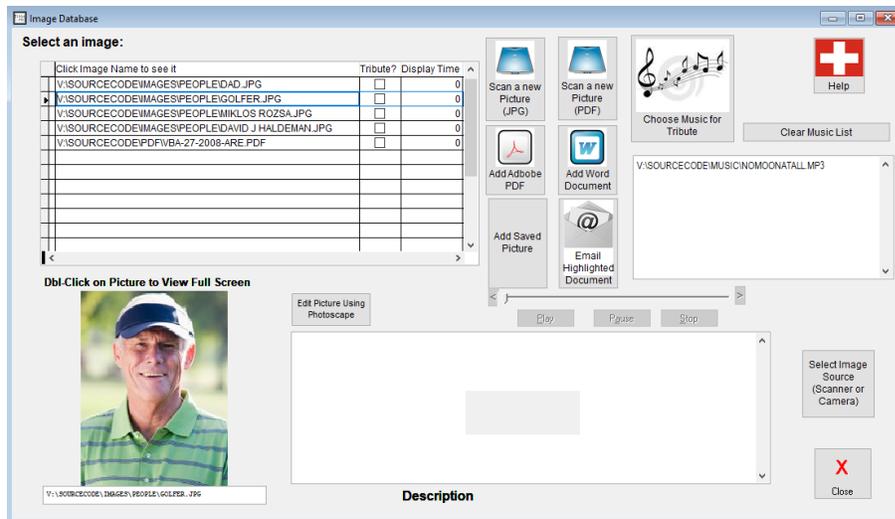
When you start TerraPro, you will be notified of any items that still have not been completed. (Turn off this feature by clicking cancel on the reminder screen. You can still access the reminders by right-clicking the yellow checkbox menu item on the TerraPro main menu)

MANAGE IMAGES

More and more documents are being generated electronically, such as PDF files, Word Documents and digital images. Having a single place to keep these documents, or a place to scan paper documents for permanent digital storage is becoming a fast way to retrieve these documents for future use. TerraPro allows you to manage the “paperless” office by storing documents related to a case right within the program. To get started, click the “*Manage Images*” button to the right of the Obituary.



You can store an unlimited number of documents in TerraPro’s filing system, and instantly retrieve them. Document formats include Adobe PDF, Microsoft XPS and MDI, and scanned images in JPEG or Bitmap (bmp) formats. You can also enter a short description of the document, including the source and the date received.

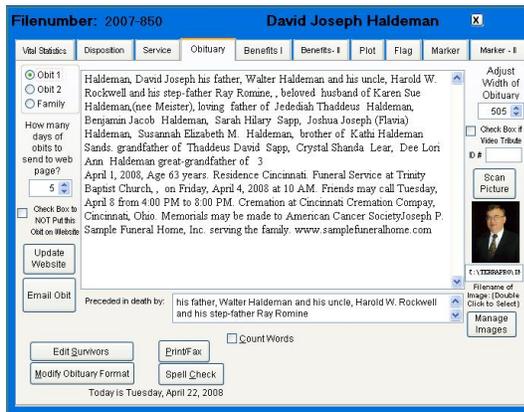
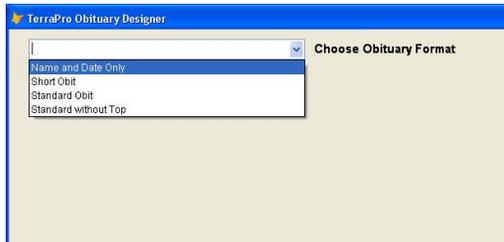


On the image list, click the name of the image to bring it up. If it is a picture, Dbl-click the picture to use the Microsoft Windows Picture and Fax Viewer to examine or print the image.

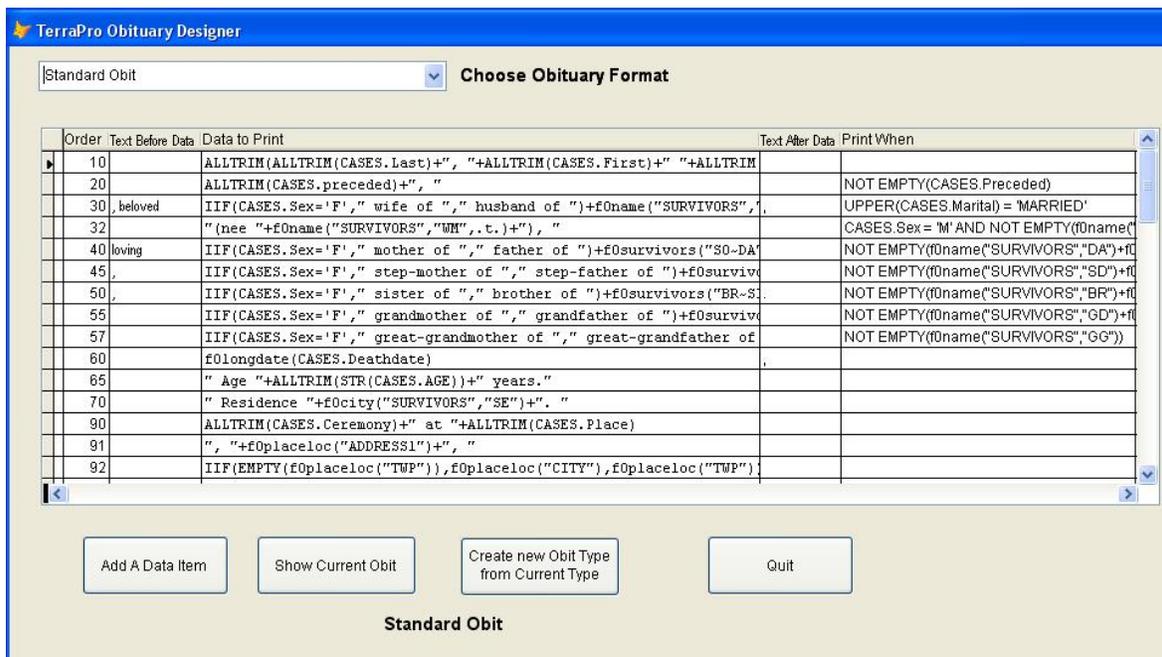
This section is for users who feel they can handle a little bit of FoxPro to change the way the automatic Obit Writer (CTRL-O) writes the obit. Others may wish to call Terradise Computer Systems, Inc. personnel for help (free for the first few minutes – then we can let you know if you are getting into some chargeable time.)

On the Obituary Page click the button in the lower left that says “*Modify Obituary Format*”:

This will bring up a pulldown list of the types of obituary formats you have stored on your computer:



If you choose Standard Obit (the one which CTRL-O writes by default), something like the following will appear:

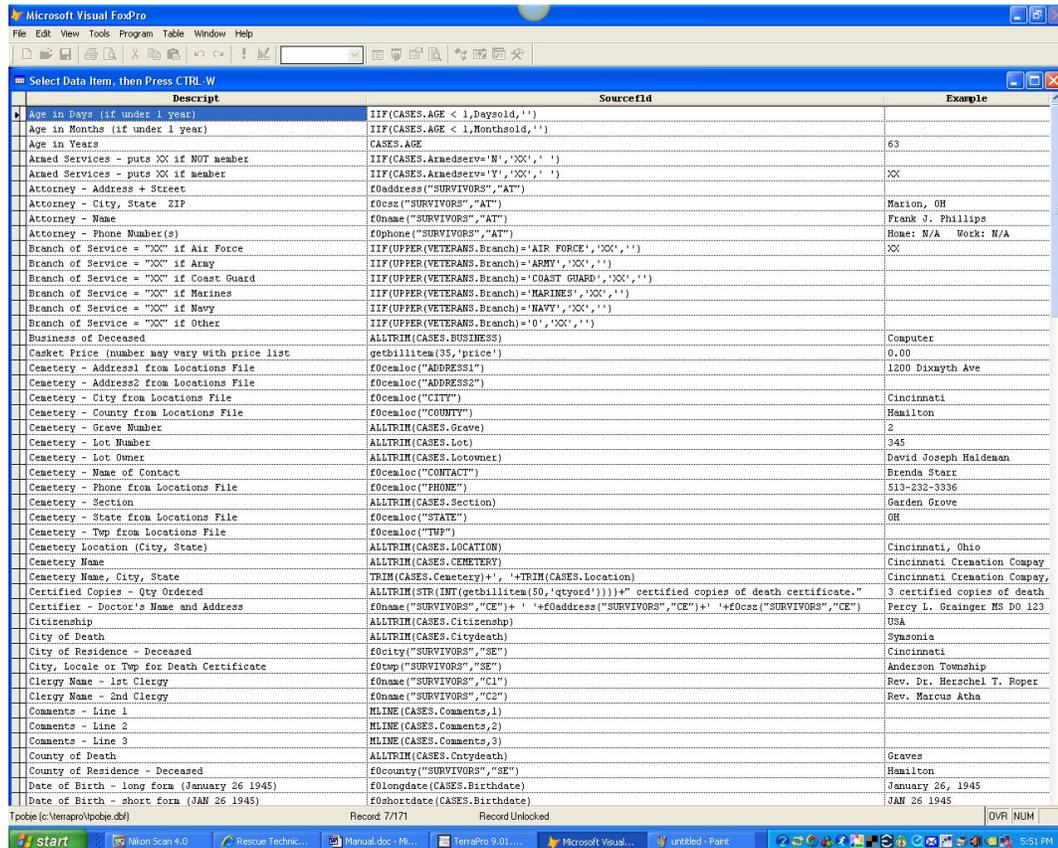


This is nothing more than a list of all the FoxPro expressions (formulas) that construct the obituary from the data you have entered. They do so in the order specified at the left. If there is fixed text to put BEFORE the data, the next column shows that text.

The Data to Print column contains FoxPro expressions or formulas that extract the data from the case files. WE DO NOT EXPECT YOU TO MEMORIZE OR KNOW ALL THESE EXPRESSIONS. You can, however, use them as a basis for constructing your own customized obituary text.

If you click on the button that says “*Show Current Obit*” you can see how this group of expressions produces the obituary. You can also click the pulldown list and see other formats (if they have been saved).

To see how data items can be added to the list for your obits, scroll to the bottom of the *Data to Print* list, and add a new blank line (if not already a blank line at the end). Place the mouse on the blank *Data to Print* column, and right-click. You will see this list:



You can scroll down through this list and choose any FoxPro expression that gives you the data you wish to see. Scroll to the appropriate line and press CTRL-W and the expression will be pasted to the empty line. (For a complete list, see Appendix C) Note that the value of the expression is calculated and presented in the third column (far right).

It is also possible to add new expressions to the list – use CTRL-Y to add a new line. You can cut and paste an expression that is close to the one you want, and then modify it. To find out how to use a user-defined function (they start with f0), put a question mark in quotes (“?”) right after the first parentheses. When you leave the field, a message will pop up showing the usage of the function:



You can create new obituary formats by saving one of the existing formats as a new one, then modifying the new one to suit. The new format will be added to the list automatically.

If your list contains more than one style of obituary, when you press CTRL-O, you will be asked to select which style of obituary you wish to use.

With nearly unlimited obituary formats, and the ability to save up to three obituary styles with each case, you should be able to meet the needs of several local papers at the same time.

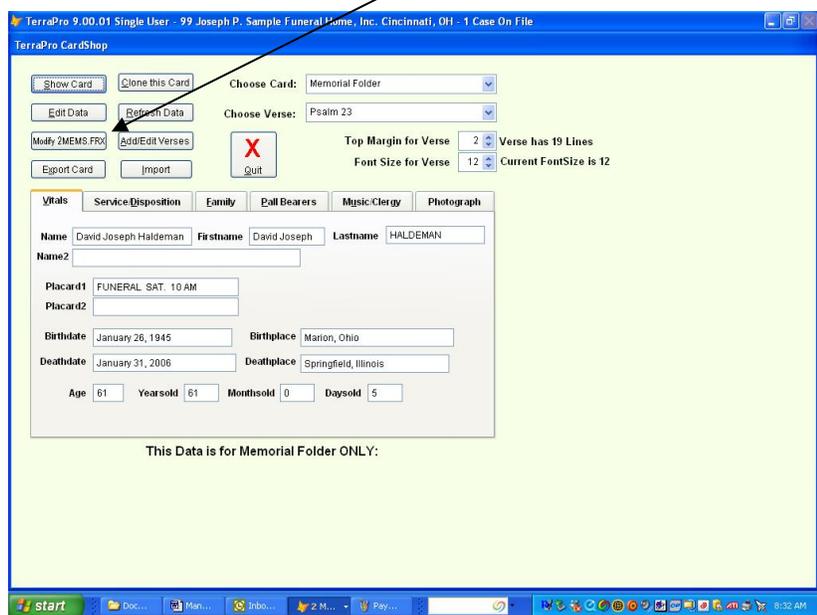
ADDING HEADERS TO MEMORIAL CARDS

One of the features of CardShop is the ability to edit the card on the screen, without having to use the Edit Data button to change information.

However, the headers (such as DATE BORN, DATE DIED etc.) may need to be adjusted so that they can be edited, too. In the past, the headers were fixed text added to the card in the FoxPro Report Generator.

The current version of TerraPro now allows those headers to be edited by using a reference to them such as Header1, Header2, Header3 etc through Header20.

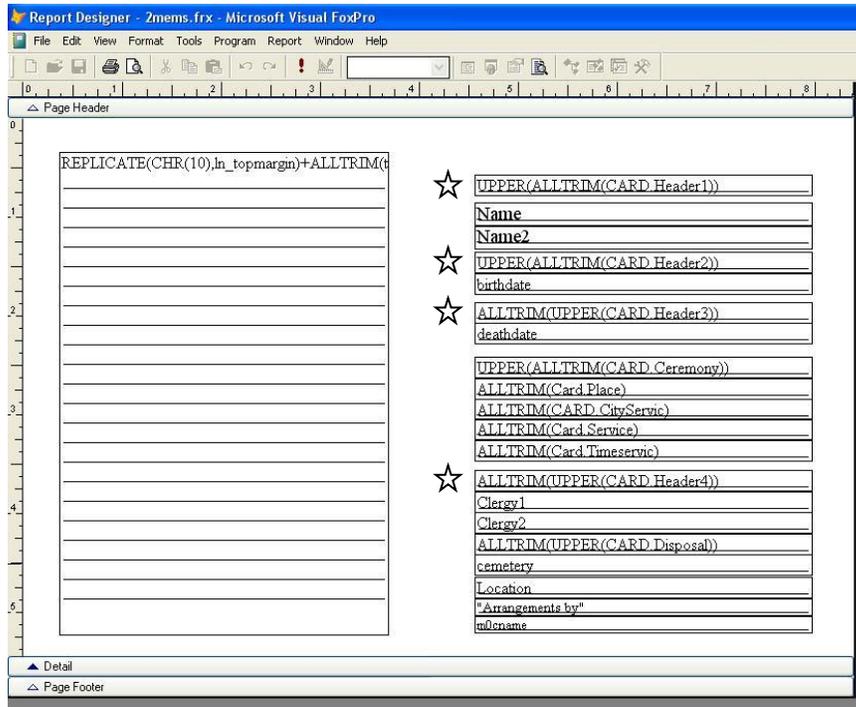
Edit the Layout of the card by clicking the Modify button:



A warning will come up advising you that you will be making changes to the form. Click Yes to continue. (if you feel uncomfortable editing a working card, use the “Clone this Card” button to make a copy of it – then you can make changes freely without affecting the original)



Change your card to match the sample below:



Notice that the ceremony type will be extracted from the CARD.Ceremony field, so it does not need a CARD.Header field. The same applies to the Disposition (Burial, Interment, etc)

Replace your old fixed headers with new objects as shown next to ☆ above and save the new card using CTRL-W.

The next step is to setup defaults for what those headers will be.

RIGHT-CLICK the pulldown next to the "Choose Card" selection. You will see something like the following:

Click in Leftmost Column to Delete, CTL-W when finished						
Tbldesc	Tblchar	Header1	Header2	Header3	Header4	Header5
#2 Acknowledgement Card-The Family	ACKTF					
#3 Acknowledgement Card-During the	ACKDT					
#4 Acknowledgement Card-Your Kind	ACKYK					
#5 Acknowledgement Card-Thank You	ACKTY					
Bookmarks	BOOKM					
Copy of Foster Wall	29089					
Foster Wall	REGWL					
Foster Wall2	REGPL					
Mass Program - Duplex	MASS1					
Memorial Folder	2MEMS	IN MEMORY OF	DATE BORN	DATE DIED		OFFICIATING
Memorial Folder (2-up) Script Font	2MEMV					
Memorial Folder - Picture & Verse	MEMPI	In Loving Memory of	Born	Died		Age
Memorial Folder 2-up with picture	2MEMP	In Loving Memory of	Born	Died		Age
Memorial Folder Dbl Fold w/Picture	MEMPX					
Memorial Folder Duplex	28514					
Memorial Parchments	MEMPA					
Memorial Parchments (back)	MEMPB					
Prayer Cards	SHOLY					
Register Book 1 - In Memory of Page	REGIM					
Register Book 2 - Services Page	REGSV					
Register Book 3 - Family Record	REGFR					
Register Book 4 - Final Rest Page	REGFP					
Register Book 5 - In Memory Foldout	REGFO					
Register Book 6 - Pall Bearer Page	REGPA					
Register Book 7 - Floral Tributes	18514	Floral Tributes				
Register Book 8 - Music and Clergy	19089	Music	Clergy			
Register Book Allison & Rose	REGAL					
Register Book Stand Placard	REGPL					
Register Book WebPage	HTML1					

Appendix E - Crematory

MANAGE YOUR CREMATORY

With the optional cremation module, TerraPro can work with your existing cases to gather the information required for running a crematory. You will be able to bill other funeral homes for performing cremations, and print cremation certificates, cards and reports.

Call Terradise personnel at 513-484-9729 to add this module to your existing TerraPro installation.

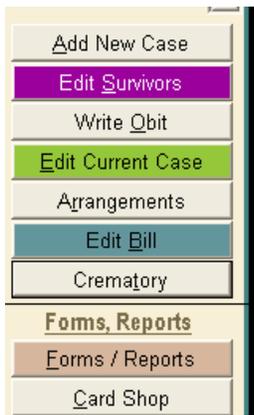
If you intend to cremate for other funeral homes in your area, a separate company will be added to your TerraPro installation. This will allow you to set up a price list for cremations and other services and merchandise you provide.

To access this company, choose it from the list of installed companies from your TerraPro opening screen:



Select the Crematory from your list of installed companies

Just like in the funeral home version of TerraPro, your cases may be accessed using the pulldown menu. But notice the menu selection titled Crematory. This is how you access the screens which show cremation-specific information.



Clicking the Crematory button brings up the Crematory Case Screen:

CREMATORY - [] X

Joseph P. Sample Crematory **Joseph Norman Thomas**

Deceased | Billing | Process Log | Emissions

Filenumber: 2014-018

First: Joseph Middle: Norman Last: Thomas

Race: White Sex: M Social Security #: 666-66-6666 <-- Search by SSN

Birthdate: 06/06/1906 Deathdate: 06/09/2014 Time of Death: 1 AM Age: 108

Weight: 87 Autopsy? Embalmed? Pacemaker?

Artificial Joints or Limbs: _____

Family to be Present at Cremation? Cremation Date: 09/06/2014 <-- Search by Cremation Date
Time: 10 AM

Disk #: 018 District #: _____ County of Death: _____

Cause of Death: _____

Top Prev Next Bottom Copy Print Label Print Info Print Process Log Print Certificate Add Delete

Modify Report Layout Import

Exit

Deceased Vital Statistics

This is the main editing screen for your crematory. From here you can copy a case from the current TerraPro case file, or import one from the other branches. If the cremation is for another funeral home, you can Add a new case and enter the information directly on the screen, and bill the charges to the funeral home.

Two Scenarios:

1. If the case is for another funeral home, the billing is done on the TerraPro Billing screen. Then a monthly statement can be generated from the Crematory Billing Screen for each funeral home you serve. TerraPro personnel will assist you in setting up your crematory price list and default bills when you purchase the crematory module.
2. If the case is from your funeral home, use the Copy option on the crematory screen to copy the current TerraPro case into the crematory. You will not need the billing screen unless you treat the crematory as a separate accounting entity.

Process Log:

The process log lets you keep track of the details of cremation:

The screenshot shows a software window titled "CREMATORY" with a sub-header "Joseph P. Sample Crematory" and "Joseph Norman Thomas". The "Process Log" tab is active, showing a form with the following fields:

- Special Instructions: Remove Rings
- Date Delivered to Crematory: 09/06/2014 09:45:00 AM
- By: Funeral Home
- Logged in by Crematory Rep: DJH
- Type of Cremation Container: Cardboard Box
- Remains placed in retort by: DJH
- Date : Time Placed: 09/06/2014 10 AM
- Remains taken from retort by: DJH
- Date : Time Removed: 09/06/2014 02:30:00 PM
- Type of Urn/Container: Batesville U8782R
- Cremains placed in urn/container by: [Empty]
- Date : Time Inurned: // : : AM
- Chapel/Funeral Home notified cremains ready by: [Empty]
- Date : Time Notified: // : : AM
- Spoke to (contact): [Empty]
- Who Returned Cremains to FH?: [Empty]
- Date : Time Accepted: // : : AM
- Special Notations: [Empty]

The bottom toolbar includes buttons for Top, Prev, Next, Bottom, Copy, Print Label, Print Info, Print Process Log, Print Certificate, Add, Delete, Import, and Exit.

Details like pickup, delivery, urns and personnel are recorded on this screen. When you print the process log for your files, all this information is reported, along with emissions, if any:



CREMATION PROCESS LOG

CREMATION # 2014-018

NAME OF DECEASED: Joseph Norman Thomas

CHAPEL OR OTHER FUNERAL HOME: Clepper Funeral Chapel

SPECIAL INSTRUCTIONS: Remove Rings

DELIVERED TO CREMATORY: DATE: 09/06/2... **TIME:** 9:45 AM **BY:** Funeral Home

LOGGED IN BY CREMATORY REPRESENTATIVE: DJH

TYPE OF CREMATION CONTAINER: Cardboard Box

APPROXIMATE WEIGHT OF CONTAINER & DECEASED: 87

REMAINS PLACED IN RETORT BY: DJH **DATE:** 09/06/2... **TIME:** 10 AM

CREMAINS TAKEN FROM RETORT BY: DJH **DATE:** 09/06/2... **TIME:** 2:30 PM

TYPE OF URN/CONTAINER: Batesville U8782R

CREMAINS PLACED IN URN/CONTAINER BY: _____ **DATE** // **TIME:** 12:00 AM

CHAPEL/FUNERAL HOME NOTIFIED CREMAINS READY BY: _____

DATE: // **TIME:** 12:00 AM **SPOKE TO:** _____

WHO RETURNED CREMAINS TO FUNERAL HOME? _____

DATE: ... **TIME:** 12:00 AM

SPECIAL NOTATIONS:

TEMPERATURE MONITOR: ON FILE

VISIBLE PARTICULATE EMISSIONS: **ABSENT** **PRESENT**
(IF PRESENT COMPLETE THE FOLLOWING)

COLOR: Black

TOTAL TIME DURATION OF EMISSIONS: 1 minute

CORRECTIVE ACTION TAKEN: none

As with all TerraPro forms, this report can be customized for your crematory.

TerraPro will also print a certificate of cremation and a label



CERTIFICATE OF CREMATION

Zanesville, Ohio

September 8, 2014

The undersigned, being on this date the manager of Joseph P. Sample Crematory hereby certifies that the remains of

Joseph Norman Thomas

were cremated on the sixth day of September, 2014.

I further certify that the burial permit, prerequisite to the cremation of remains, accompanied the same, and that it shows June 9, 2014 as the date of death, as the cause and 108 as the age.

No. By: _____

Cremation Certificate

Joseph P. Sample Crematory
6404 Coffey St., Cincinnati, Ohio 45230

Cremation No. 018 Date: 09/06/2014

Name of Deceased
Joseph Norman Thomas

Date of Birth 06/06/1906

Date of Death 06/09/2014

Cause of Death:

Permit No. District No.

Representative, Joseph P. Sample Crematory

Label



Appendix F – Australian Version

DIFFERENCES FROM THE U.S. VERSION

Although TerraPro was written for use in the United States, it can adapt itself to use in Australia. When the Setup screen is modified to indicate Australia as the country, several screens change their appearance.

The underlying databases remain the same, but may be presented to the user in a different format that that shown in this manual.

The screens affected include the First Call Screen, and the Edit Case Screens (Vital Statistics, Disposition, Services and Obituary) . In addition, the flag, marker and burial benefits screens have been removed and the military benefits are entered on form D307 from the Vital Statistics Screen.

To simplify data entry, the First Call Screen serves also as the launch screen for accessing all relevant Australian data:

VITAL STATISTICS	SERVICE DETAILS
First Call Date: DATE: 04/10/2012 TIME: 12:00 AM THE LATE: Robert David Probos ADDRESS AT PASSING: <input type="radio"/> Inpatient <input type="radio"/> ER/Outpatient <input type="radio"/> DOA <input type="radio"/> Nursing Home <input type="radio"/> Residence <input type="radio"/> Hospice <input checked="" type="radio"/> Other (Specify) Other (Specify) RESIDENTIAL ADDRESS: Roger Hemmerly Memorial Rest Home TOWN/SUBURB: Daytona Beach STATE: FL Date of Birth: 21/02/1936 Date of Death: 25/09/2014 Age - Yrs-Months-Days: 78 7 4 DOCTOR / CORONER CASE #: CORONER CASE #: 5000 Certifier's Address: RELEASE FORM FAXED? <input checked="" type="checkbox"/> GMO? <input type="checkbox"/> Date/Time Release Faxed: 13/04/2015 01:35 PM	<input type="checkbox"/> DO WE HAVE PRE-ARRANGEMENTS?
FAMILY / CALLER CONTACT RELATIONSHIP: Spouse NAME: Georgia May Foolery ADDRESS: 993 Roo Way TOWN/SUBURB, STATE: Springtown, VIC 4439 HOME PHONE: +34 3 1121 CELL PHONE: +61 3 3444 2222 EMAIL: gmf@gmf.com	
Click here to continue...	
<input type="button" value="Quit"/>	

The 2nd tab of this screen includes service information:

VITAL STATISTICS	SERVICE DETAILS
 <- RIGHT CLICK TO USE EVENT CALENDAR	
SERVICES	
SERVICE DATE AND TIME	27 September, 2014 4:00 PM
CREMATION / BURIAL	Cremation Crematory: Greater Cincinnati Crematory
Cemetery:	Notes about Ashes
Marion Cemetery	
Cemetery Location: (City, State)	Place of Inurnment: Scattered in the Olentangy River at T
Zanesville, Ohio	Inurnment: Town/Suburb, State: 1536 Whetstone River Road
Notes about Disposition:	SECTION: GARDEN2
	LOT: 17 GRAVE: 1
CHAPEL / CHURCH	Joseph P. Sample Funeral Home, Inc.
VIEWING / ROSARY	Saturday, 27 September, 2014 from 2:01 PM-4:30 PM at Joseph P. Sample
CELEBRANT / CLERGY	(none)
ADD'L CELEBRANT / CLERGY	(none)
FUNERAL NOTICE	Probos, Robert David preceded in death by an uncle, Heironymous Bosch. American Kidnev Fund 8110 Executive Boulevard Suite 1010 Rockville MD
DEATH NOTICE	Ethan Allen Probos, age 65, died Monday, September 20, 2010 at his resid
<input type="button" value="Click here Continue to Billing Selections"/>	<input type="button" value="ENTER PAYMENTS"/>
<input type="button" value="ENTER Births, Deaths and Marriages"/>	<input type="button" value="BDM"/>
<input type="button" value="Quit"/>	

From these two screens, the user can access the Event Calendar and Billing Screens. The BDM button allows the entry of Birth, Death and Marriage information, as well as parents, spouse(s) siblings and children. This information can then be electronically submitted to the proper state authorities' websites.

Remember to pass your mouse over each field for tips on entering data into that field.

The Survivors screen and the Case Data screen as described in the U.S. version in this manual can be accessed by RIGHT-CLICKING the menu choices Edit Current Case and Edit Survivors in the Australian version.

Index

- Accounting Software**
 - Merchandise Items, 77
 - QuickBooks™, 76
 - Setup, 76
- Accounts Receivable Report, 44**
- Acknowledgement Cards, 33**
- Add Case, 4**
- adding branches, 114**
- After Care, 46, 50**
- ALLTRIM()**
 - when to use, 94
- Arrangement Conference**
 - entering date and time, 6
- ASD, 15**
- Australian Version, 134**
- backup**
 - changing interval, 114
- bill number**
 - assigning next, 114
- billing, 66**
 - allow description edit, 110
 - date, 71
 - discounts, 70
 - entering payments, 69
 - finance charges, 70
 - Item not on pulldown, 59, 68
 - modify billing format, 110
 - monthly statements, 105
 - more than one person, 67
 - person responsible, 67
 - printed bill formats, 72
 - starting, 66
 - templates, 61
- bills**
 - modifying format, 71
 - types, 63
- Burial Benefits**
 - filling in form, 16
- Cards**
 - adjusting, 36
 - Edit Data, 37
 - photographs on, 42
 - printing, 33
- CardShop**
 - changing data folder, 114
 - Header Editing, 126
- Case List**
 - Order, 7
- Casket Pictures, 60**
- Cemeteries**
 - editing lists, 22
- cemetery**
 - lot, section, grave, 39
- centering**
 - verses, 36
- Checklist, 13, 122**
- Choose Company, 2**
- Churches**
 - editing list, 25
- city**
 - default, 113
- clergy**
 - editing list, 10
 - on list, 55
- Comments, 13**
- Company**
 - Selection, 2
- contact**
 - first call screen, 6
- copy case**
 - from another computer, 104
 - from preneed, 103
- county**
 - default, 113
- cremation certificate, 133**
- cremation module, 129**
- crematory, 106, 129**
- data**
 - apparent loss, 38
 - how stored, 86
- Data**
 - tables, 107
- data directory, 113**
- data expressions**
 - list, 116
- Data Expressions, 49**
- Date Entry**
 - date of death, 5
- Dates**
 - method of entry, 8
- default**
 - bills, 61
 - defined, 61
- Default Bills**
 - adding, 63
- Delete a Case, 105**
- Dialogue Boxes, 3**
- Digital Litho, 60**
- discounts, 70**
- Doctors**
 - certifier data, 10
 - editing list, 10
 - entering new, 10
 - on list, 55
- Document Management, 123**
- dot prompt, 106**
- double click**
 - speed, 2
- duplicate**

- locations, 26
- Edit Case**, 7
- E-Litho**, 60
- embalmers**
 - adding or editing, 10
- Envelopes**, 53
- Facilities**
 - choose, 6
 - enter new, 6
- Fields**
 - definition, 6
- file folder labels**, 54
- File numbering**, 4
 - Changing default, 4
 - changing format, 114
 - changing next, 114
- finance charges**, 70
 - changing percentage rate, 112
- First Call**, 4
- First Call Screen**, 5
- Fiscal Year**, 113
- Flag**
 - determining who receives flag, 18
- Flight Information**, 10
- Flight Schedules**, 119
- Floral Tributes**, 121
- fonts**
 - changing on forms, 90
- form**
 - definition, 87
- Forms**
 - copying (cloning), 32
 - exporting, importing, 32
 - modifying, 32
 - printing, 31
- FoxPro**, 107
- FTC**
 - compliance, 57
- funeral directors**
 - adding, 10
- funeral home name**
 - changing, 113
- hyphenated names**, 5
- icon**, 1
- indexes**
 - re-indexing, 105
- informant**, 6
 - address & phone, 6
 - relationship to deceased, 6
- Insurance**
 - add forms, 79
 - convert existing forms, 82
- itemizing bills**, 63
- Jewish Funerals**, 13
- labels**, 54
- Labels**, 53
 - locations, 26
- Letters**, 48
- locations**
 - adding, changing, 23
- Locations**
 - editing, 8
 - editing lists, 22
- mailing list**
 - codes, 56
- Mailing List**, 55
- Mailmerge**, 50
- Main Screen**, 3
- Maps**
 - Cemetery, 10
- Mass Mailings**, 50
- Memorial Folders**, 33
- Merchandise Accounting Codes**, 77
- Merge**
 - data into a letter, 49
- Military Honors**, 8
- monthly statements**, 105
- Mouse**
 - Right-click, 22
 - vs. keyboard, 2
- multiple instances**, 2
- Music**, 15
- network**
 - setting up[, 113
- obituary**, 7
 - automatic writing of, 14
 - customizing, 15
 - modifying format, 96, 124
- package bills**, 63
- Paperless Office**, 123
- parentheses**
 - in expressions, 95
- passwords**, 113
- payments**
 - deleting, 70
 - entering on bill, 69
- PDF Files**, 123
- person responsible**, 67
- Photo**
 - editing, 14
- Photo Editing**, 15
- Photographs**
 - on cards, 42
- PhotoScape**, 15
- pick lists**
 - how to use, 55
- pictures**
 - Blank Wallpaper, 3

Changing Wallpaper, 3
 on memorial folders, 3
 where stored, 42

Places
 editing lists, 22

Post-Service Followup, 46, 50

Prayer Cards, 33

price
 changing on bill, 68

Price List, 57
 adding new items, 59
 item numbers, 58
 package pricing, 63
 packages, 59
 printing, 61
 variable prices, 60

profit calculator, 71

quantity
 of item on bill, 69

QuickBooks™, 76

Quicken™, 76

Receipts
 printing, 70

refunds, 70

Register Book, 40
 Family Record, 39
 printing, 33

registrar, 113

relationships, 28

Religion
 Jewish, 13

re-number case, 4, 105

report
 choosing, 44
 definition, 88

report designer, 88

Rescue, 106

return address, 53

right-click, 22

Sales Tax
 adjusting rate, 70
 changing default rate, 112
 how calculated, 70
 linking to QuickBooks, 76
 on item, 69

SBT Accounting
 links, 113
 screen size, 68
 search function, 102

Ship-in/Ship-out. *See* Flight information size
 verses, 36

Slide Show, 15

staff
 on list, 55

Support, 106

Survivors
 definition, 28
 entering, 28
 other relationships, 28
 relationships-adding and editing, 28

Tax
 how calculated, 70
 on an item, 69

texting, 29

ToDo List, 122

tool tips, 8

Tribute, 15

TriState Online, 15

Utility Menu, 101
 using to change setup, 112

VA Forms
 21-530, 16
 flag, 18
 marker (40-1330), 19
 online, 16

verses
 centering, 36

version changes, 105

Veterans Honors, 8

Votive Online TerraPro, 15

Wallpaper
 changing, 3
 none, 3

Web Pages
 creating from forms, 32

word count, 15

Yahrzeit Calendar, 13