

BACASNG

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Introduction

	<p>The functionality of BACASNG is driven by the Outlook bar to the side of the screen</p> <p>Below is a summary of the function of each section of the Outlook bar and how to use it. Click on the underlined heading for more detail.</p> <p>NOTE: If you can't find the help you need using the menus below, try the SEARCH tab on the top left hand corner of this Help page</p>
Clients	<u>Clients</u> - Search for and amend any person recorded on BACAS by role or booking
Cremation	<u>Cremation</u> - Search for any cremation or strewing. Record cremation or strewing information without going through the diary.
Diary	<u>Diary</u> - Book a Cremation, Burial or Strewing onto a diary page. Enter Service Details, Music, Death Registration Information, and Finance for the booking. Customise the diary page. Add a new User.
Finance	<u>Finance</u> - Set up and amend charges and account codes, generate fees for a given period, produce invoices, and clear or receipt invoices
Generate	<u>Generate</u> - generate register numbers for burials and cremations. Windback register numbers
Interment	<u>Interment</u> - search for an existing Burial, Grave or Exhumation. Enter a burial record or grave record. Exhume a deceased
Memorial	<u>Memorials</u>
Output	<u>Output</u>
Preferences	<u>Preferences</u>
Setup	<u>Setup</u>

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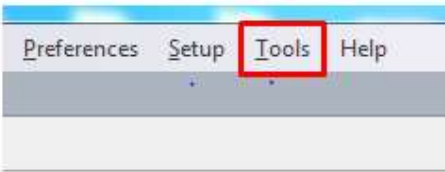
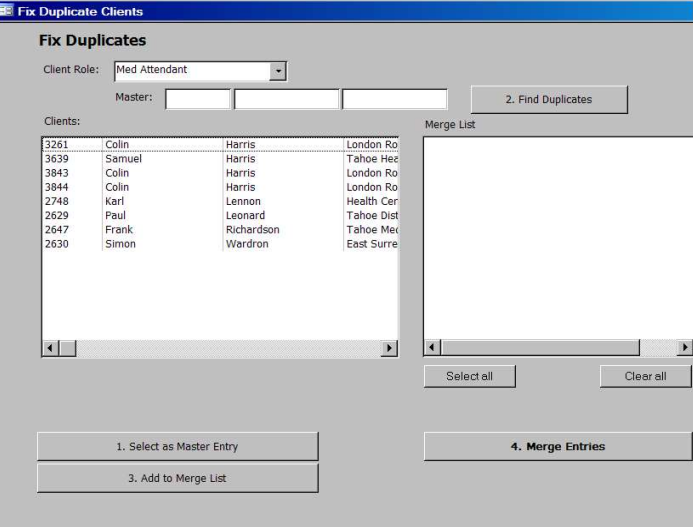
Clients

Clients	
 People	People <ul style="list-style-type: none"> <u>Fix Duplicate Client Records</u>

 Funeral Directors	Funeral Directors <ul style="list-style-type: none"> • Search for an Existing Funeral Director • Create a new Funeral Director • Amend details of an Existing Funeral Director • Set up a Funeral Director as a Head Office Funeral Director • Set up a Funeral Director as a Branch Funeral Director • Set up a Funeral Director for Direct Billing
 All Bookings	All Bookings <ul style="list-style-type: none"> • Search for a cremation, burial, scattering or exhumation record using deceased name

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Fix Duplicate Client Records

	How to fix Duplicate Client records <ol style="list-style-type: none"> 1. Select Tools from the top menu bar 2. and then Fix Duplicates from the drop down menu 3. Select the role from the drop down list for <i>Client Role</i> in the top left hand corner. 4. A list of all clients of this role will appear
	<ol style="list-style-type: none"> 1. Select the entry from the duplicates in the list that you wish to keep. (If unsure which to select, use the Client id to check details using the Clients on the Outlook bar) 2. Click on the "Select as Master Entry" button in the bottom left hand corner of the screen. 3. The selected entry will appear as the <i>Master</i> entry

1. Click on the "Find Duplicates" button in the top right hand corner of the screen.
2. The duplicated entries will appear on the *Merge List* on the right hand side of the screen
3. Tick the boxes of the entries you wish to merge.
4. Click on the button in the bottom right hand corner of the screen. You will see that the duplicated entries in the original list on the left hand side have been cleared.

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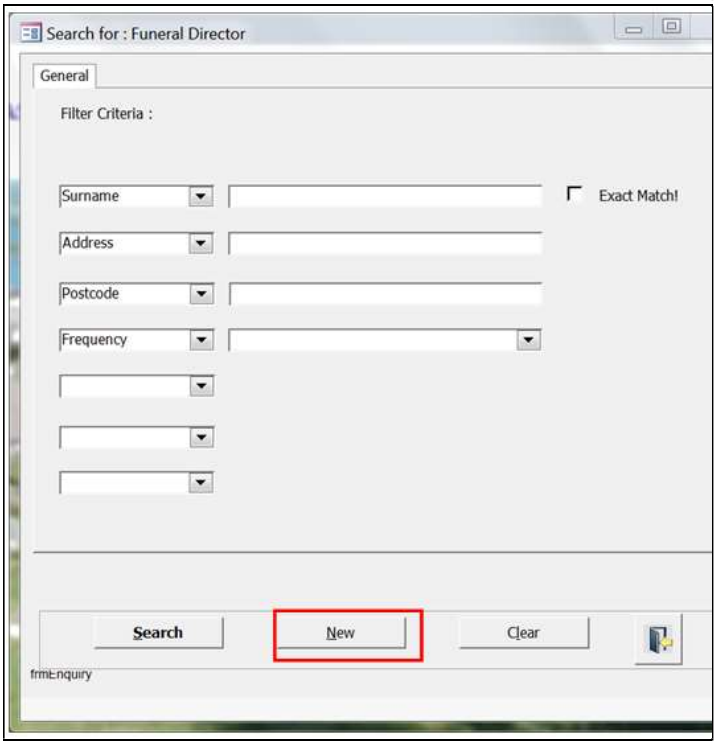
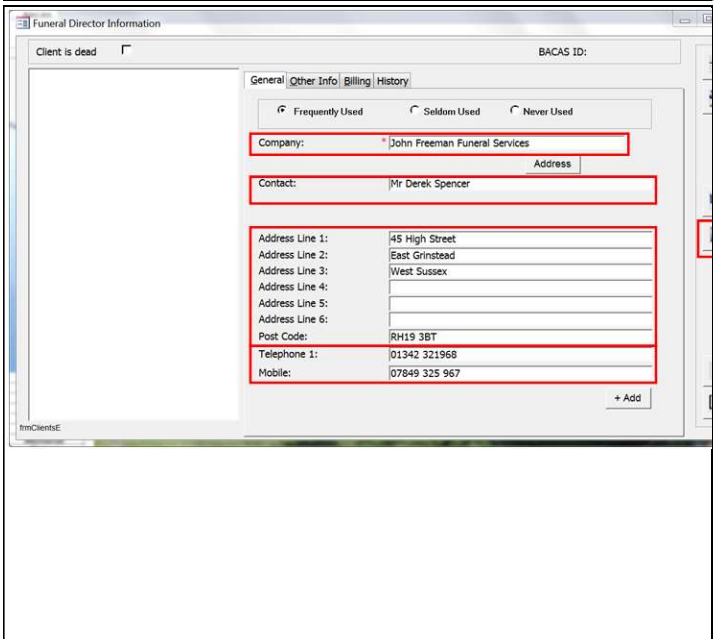
Funeral Directors

Funeral Directors

- [Search for an Existing Funeral Director](#)
- [Add a new Funeral Director](#)
- [Amend details of an existing Funeral Director](#)
- [Set up a Head Office Funeral Director for Billing](#)
- [Set up a Branch Funeral Director for Billing](#)
- [Set Up an Independant Funeral Director for Billing](#)
- [Set up a Funeral Director for Online \(Internet\) bookings](#)
- [Set up a Funeral Director for Bacas Voice \(Telephone\) Bookings](#)

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Add a new Funeral Director

	<ol style="list-style-type: none"> 1. Select Client from the Outlook bar on the left hand side 2. Select Funeral Directors from the expanded selection
	<ol style="list-style-type: none"> 1. The <i>Search for Funeral Directors</i> screen will be displayed. 2. Click on the New button
	<p>The <i>Funeral Director Information</i> screen will open with the <i>General</i> tab and the <i>Frequently Used</i> option selected.</p> <ol style="list-style-type: none"> 1. Enter the name of the Funeral Director in the <i>Company</i> field 2. Enter a contact name in the <i>Contact</i> field 3. Enter the address and post code in the <i>Address Line</i> and <i>Post Code</i> fields 4. Enter land line and mobile telephone numbers in the <i>Telephone1</i> and <i>Mobile</i> fields 5. Click on the Save button

Funeral Director Information

Client is dead ☐ BACAS ID: 3838

General **Other Info** Billing History

Frequently Used Seldom Used Never Used

Company: * John Freeman Funeral Services

Contact: Mr Derek Spencer

Address Line 1: 45 High Street
 Address Line 2: East Grinstead
 Address Line 3: West Sussex
 Address Line 4:
 Address Line 5:
 Address Line 6:

Post Code: RH19 3BT
 Telephone 1: 01342 321968
 Mobile: 07849 325 967

+ Add

1. Click on the Other Info tab
2. Click on the Pencil

Funeral Director Information

Client is dead ☐ BACAS ID:

General Other Info Billing History

Resident / Local : ☐
 Maidenname:

Telephone 2: 07849 325 968
 Fax: 07849 325 669
 EMail address: johnfreeman@funeralservices.co.uk
 Web: www.johnfreemanfunerals.co.uk

Registration Number: Approved : ☐
 Comments:

Remote Booking : ☐
 Generate numeric: Username Password
 Username:
 Password:

1. Enter a second telephone number in Telephone 2 field
2. Enter a fax number in the fax field
3. Enter an email address in the Email address field
4. Enter a web address in Web field
5. Click on the **Save** button
6. Click on **Close**

The basic information for the Funeral Director is now set up in BACAS.

To set the Funeral Director up for billing follow one of the following links:

[Set Up A Head Office Funeral Director For Billing](#) if this funeral director is a head office funeral director and you wish branch funeral directors to be invoiced to the head office.

[Set Up A Branch Funeral Director For HO Billing](#) if this funeral director is a branch funeral director and you wish all financial transactions to be invoice to the head office.

[Set Up An Independent Funeral Director For Billing](#) if this funeral director is an independent funeral director and you wish all financial transaction to be invoiced directly.

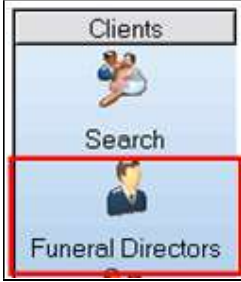
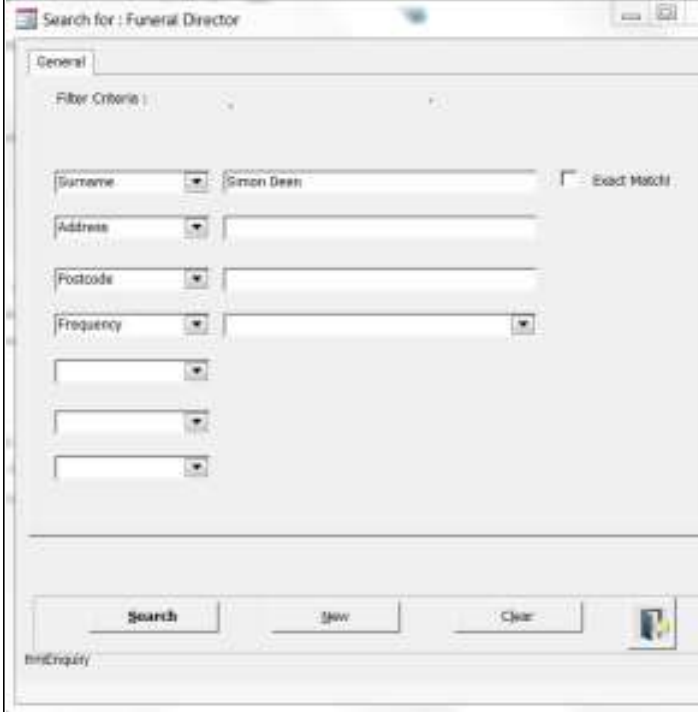
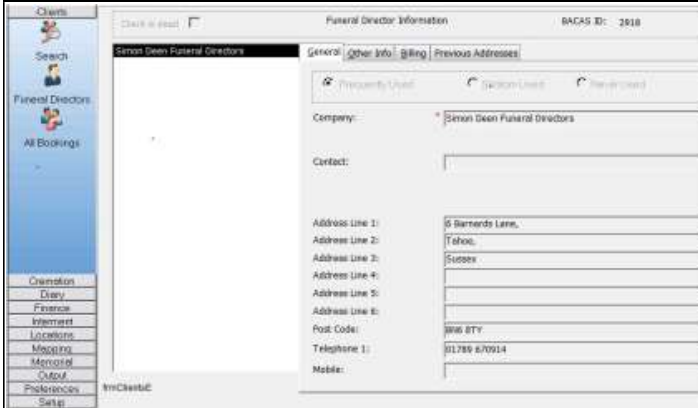
To set the Funeral Director for remote bookings follow one of the following links:

[Set Up A Funeral Director For](#)

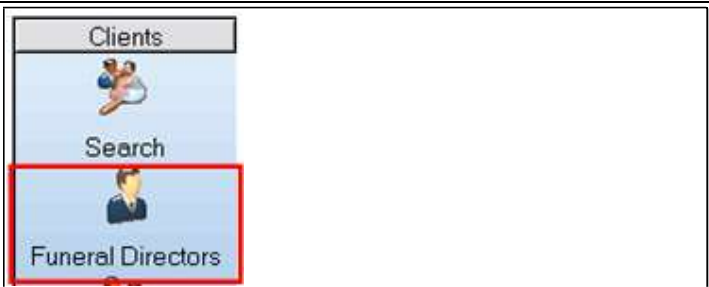

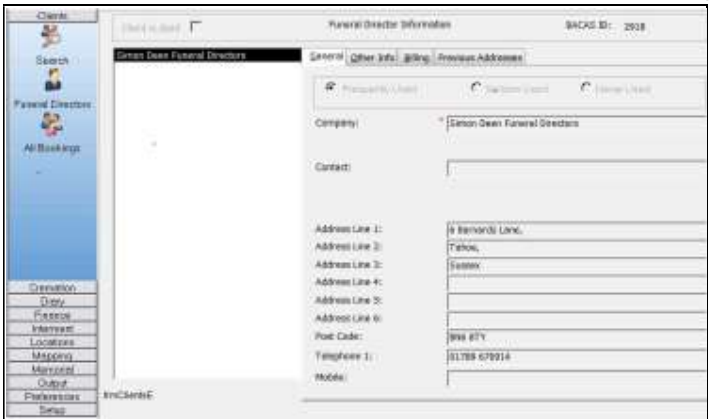
Telephone BACAS Voice Bookings
[Set Up A Funeral Director For On Line Bookings](#)

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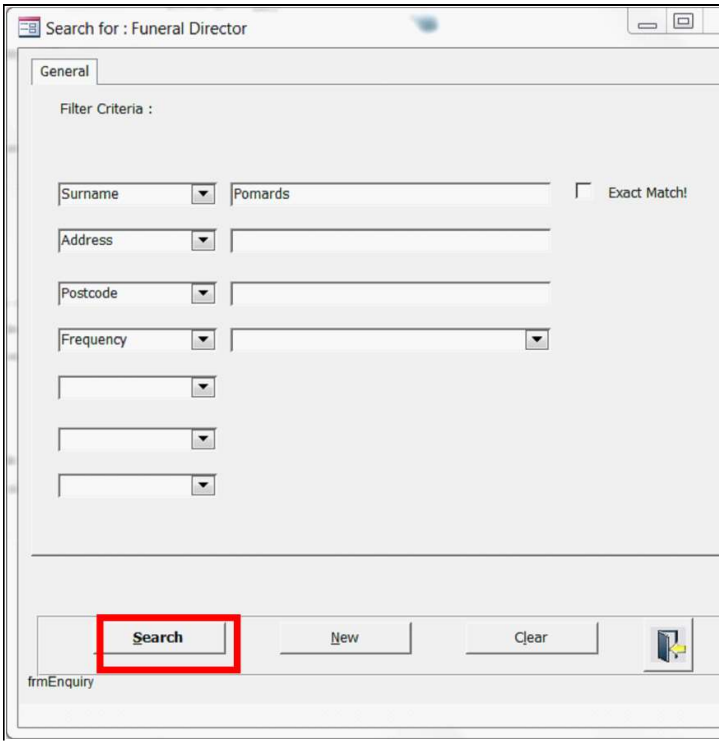
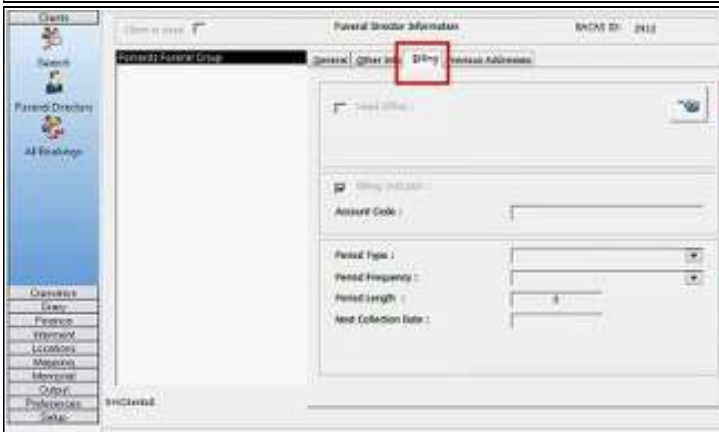
Amend details of an existing Funeral Director

	<ol style="list-style-type: none"> 1. Select Clients from the Outlook bar on the left hand side 2. Select Funeral Directors from the expanded selection
	<p>Enter the Surname, Address, Postcode or frequency of the Funeral Director and click on the Search button</p>
	<p>The Funeral Director Information screen will be displayed.</p> <ol style="list-style-type: none"> 1. To amend any field, click on the Edit pencil 2. The screen will switch to edit mode. 3. Enter amendment and click on the Save button

Search for an Existing Funeral Director

	<ol style="list-style-type: none"> 1. Select Client from the Outlook bar on the left hand side 2. Select Funeral Directors from the expanded selection
	<p>The <i>Search for Funeral Directors</i> screen will be displayed. Enter the Surname, Address, Postcode or frequency of the Funeral Director and click on the Search button</p>
	<p>The Funeral Director Information screen will be displayed.</p>

Set up a Head Office Funeral Director for Billing

	<p>Select Client from the Outlook bar on the left hand side.</p> <p>Select Funeral Directors from the expanded selection.</p>
	<p>The Search for Funeral Directors screen will be displayed.</p> <p>Enter details to select the required Funeral Director and press <i>Search</i></p>
	<p>The Funeral Director Information screen will be displayed</p> <p>Select the Billing Tab and click on the Edit pencil</p>

Client is dead ☐

Funeral Director Information BACAS ID: 2912

General Other Info Billing Previous Addresses

☒ Head Office :

☒ Billing Indicator :

Account Code : 5679854

Period Type : Cash

Period Frequency : Monthly

Period Length : 1

Next Collection Date : 27/03/2012

1. Ensure the *Head Office Indicator* is **ticked**
2. Ensure the *Billing Indicator* is **ticked**
3. An Account code can be entered if required as a link for the Funeral Director to an external accounting system (optional)
4. Select *Period Type* as *Cash*
5. Select Period Frequency according to the period for invoicing (See below)
6. Select *Period Length* according to the frequency of the period. (For example select Monthly and 1 if you intend to process invoices once each month. Select Weekly and 2 if you intend to process invoices every 2 weeks)
7. Set the *Next Collection Date*. For a Monthly period this would be the 27th. For a Weekly period, use the coming Thursday's date. BACAS will allow processing of invoices for this FD to take place after this date but not before. This date will be incremented at the time of processing by the amount of time set in Period Frequency and Period Length (. (For example selecting Monthly and 1 will increment the date by 28 days, selecting Weekly and 2 will increment the date by 14 days)
8. Click on **Save**

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Set up a Branch Funeral Director for Billing

Clients

Search

Funeral Directors

Select **Client** from the *Outlook bar* on the left hand side

Select **Funeral Directors** from the expanded selection

Search for : Funeral Director

General


Filter Criteria :

Surname ☐ Exact Match!

Address

Postcode

Frequency

Search 

frmEnquiry

The *Search for Funeral Directors* screen will be displayed
Enter the Surname, Address, Postcode or frequency of the Funeral Director and click on the **Search** button

Client is dead ☐ Funeral Director Information BACAS ID: 2918

General **Billing** Other Info Previous Addresses

Cookson and Smythe Funeral Director
Frederick Edwards Funeral Care
John Haynes Funeral Services
John Turner
Karen Jones Funerals
Kerry Brand
Pomards Funeral Group
Roderick Simmons And Sons Funeral Servi
Simon Deen Funeral Directors
T. R. Harris Funeral Services
Tahoe Funeral Services
Tavistock And Williams Funeral Services
Thomas Briggs Funeral Directors

☐ Head Office :

☒ Billing Indicator :

Account Code :

Period Type :

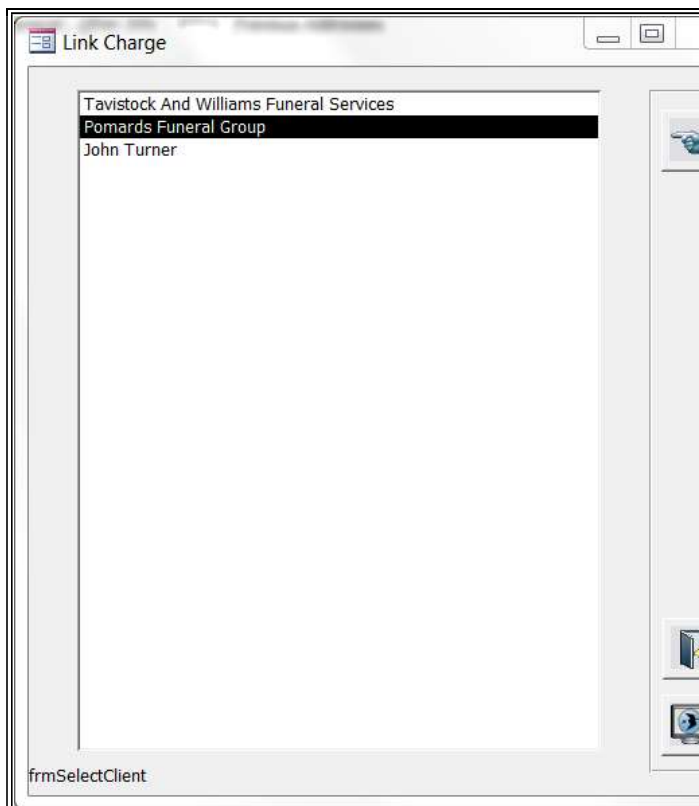
Period Frequency :

Period Length :

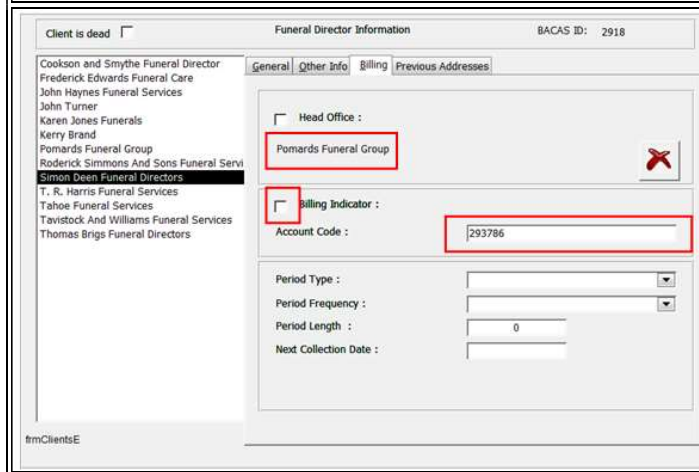
Next Collection Date :

frmClientsE

The *Funeral Director Information* screen will be displayed.
Select the **Billing** Tab and click on the **Edit** pencil
Click on the **Finger** adjacent to *Head Office*



The *Link Charge* window will be displayed
Select the *Head Office Funeral Director* from the list
Click on the **Finger**



You will be returned to the *Billing Information*. The name of the Head Office should now be displayed
Ensure the *Billing Indicator* is **not** **ticked**

An Account code can be entered if required as a link for the Funeral Director to an external accounting system (optional)
Click on **Save**

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Set Up an Independant Funeral Director for Billing




Select **Client** from the *Outlook bar* on the left hand side.

Select **Funeral Directors** from the expanded selection.

[illegible]

The *Search for Funeral Directors* screen will be displayed.

Enter the Surname, Address, Postcode or frequency of the Funeral Director and click on the **Search** button

Client is dead <input type="checkbox"/>	Funeral Director Information		BACAS ID : 2918
Cookson and Smythe Funeral Director Frederick Edwards Funeral Care John Haynes Funeral Services John Turner Karen Jones Funerals Kerry Brand Pomards Funeral Group Roderick Simmons And Sons Funeral Serv Simon Deen Funeral Directors T. R. Harris Funeral Services Tahoe Funeral Services Tavistock And Williams Funeral Services Thomas Brigs Funeral Directors	<input type="button" value="General"/> <input type="button" value="Other Info"/> <input type="button" value="Billing"/> <input type="button" value="Previous Addresses"/>		
	<input type="checkbox"/> Head Office : 		
	<input checked="" type="checkbox"/> Billing Indicator :		
	Account Code :	293786	
	Period Type :	Cash	
Period Frequency :	Monthly		
Period Length :	1		
Next Collection Date :	27/03/2013		

The *Funeral Director Information* screen will be displayed.

Select the **Billing** Tab and click on the **Edit** pencil

Ensure the *Billing Indicator* is **ticked**

An Account code can be entered if required as a link for the Funeral Director to an external accounting system (optional)
Select *Period Type* as *Cash*
Select Period Frequency according to the period for invoicing


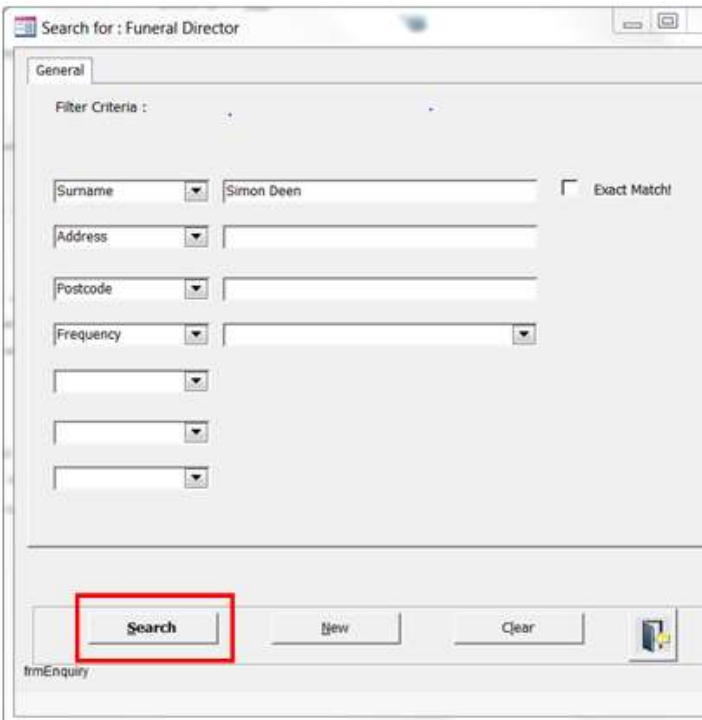
Select *Period Length* according to the frequency of the period. (For example select Monthly and 1 if you intend to process invoices once each month. Select Weekly and 2 if you intend to process invoices every 2 weeks) Set the *Next Collection Date* as the 27th day of the month.

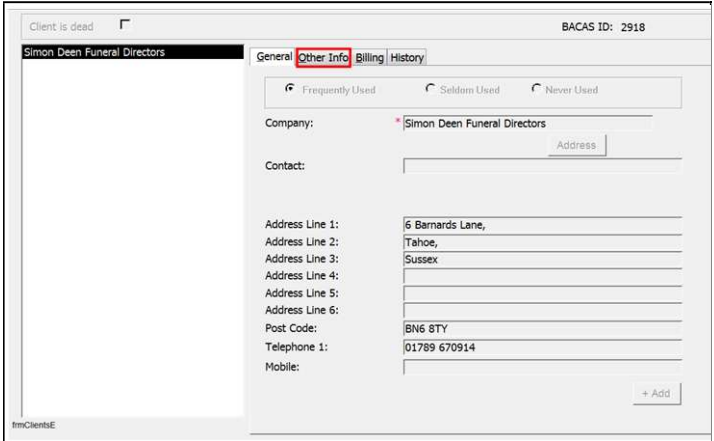
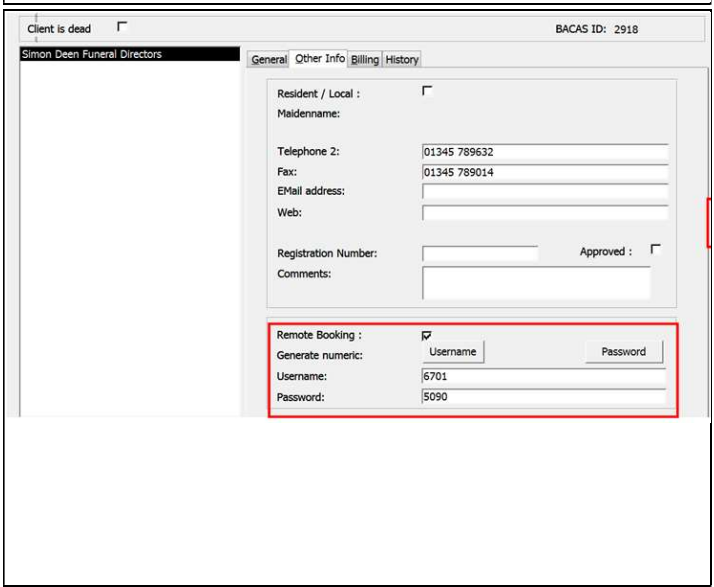
BACAS will allow processing of invoices for this FD to take place after this date but not before. This date will be incremented at the time of processing by the amount of time set in Period Frequency and Period Length (. (For example selecting Monthly

	and 1 will increment the date by 28 days, selecting Weekly and 2 will increment the date by 14 days) Click on Save
--	--

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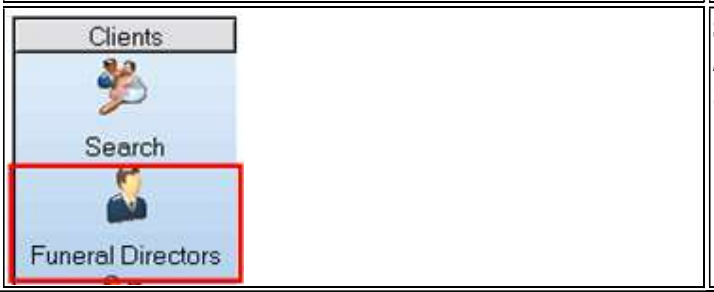
Set up a Funeral Director for Online (Internet) bookings

	NOTE: If you would like a funeral director to access the diary through the web based booking system (BACAS Bookings) you need to set up a username and password for the Funeral director:
	Select Client from the <i>Outlook bar</i> on the left hand side. Select Funeral Directors from the expanded selection.
	The <i>Search for Funeral Directors</i> screen will be displayed Enter the Surname, Address, Postcode of the Funeral Director and click on the Search button

	<p>The <i>Funeral Director Information</i> screen will be displayed. Select the Other Info Tab and click on the Edit pencil</p>
	<p>Tick the Remote Booking flag Type in the 4 digit number for the Funeral Director in the <i>Username</i> field. This must be unique. (Alternatively click on the Username button to randomly generate a number) Type in the 4 digit number for the Funeral Director in the <i>Password</i> field. This can be the same as the <i>Username</i> (Alternatively click on the Password button to randomly generate a number) Click on Save Repeat the previous 2 steps to set up another Funeral Director for Telephone bookings. Click on the Close button</p>

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Set up a Funeral Director for Bacas Voice (Telephone) Bookings

	<p>NOTE: If you would like a funeral director to access the diary through the telephone booking system (BACAS Voice) you need to set up a pin number for the Funeral director:</p>
	<p>Select Client from the <i>Outlook bar</i> on the left hand side. Select Funeral Directors from the expanded selection.</p>

Search for : Funeral Director

General

Filter Criteria :

Surname ☐ Exact Match!

Address

Postcode

Frequency

Search New Clear

ImEnquiry

The *Search for Funeral Directors* screen will be displayed
Enter the Surname, Address, Postcode of the Funeral Director and click on the **Search** button

Client is dead ☐ BACAS ID: 2918

Simon Deen Funeral Directors

General **Other Info** Billing History

☒ Frequently Used ☐ Seldom Used ☐ Never Used

Company: *Simon Deen Funeral Directors

Contact:

Address Line 1: 6 Barnards Lane,

Address Line 2: Tahoe,

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code: BN6 8TY

Telephone 1: 01789 670914

Mobile:

+ Add

ImClientSE

The *Funeral Director Information* screen will be displayed.
Select the **Other Info** Tab and click on the **Edit** pencil

Simon Deen Funeral Directors

General Other Info Billing History

Resident / Local : ☐

Maidenname:

Telephone 2: 01345 789632

Fax: 01345 789014

E-Mail address:

Web:

Registration Number: Approved : ☐

Comments:

Remote Booking : ☒


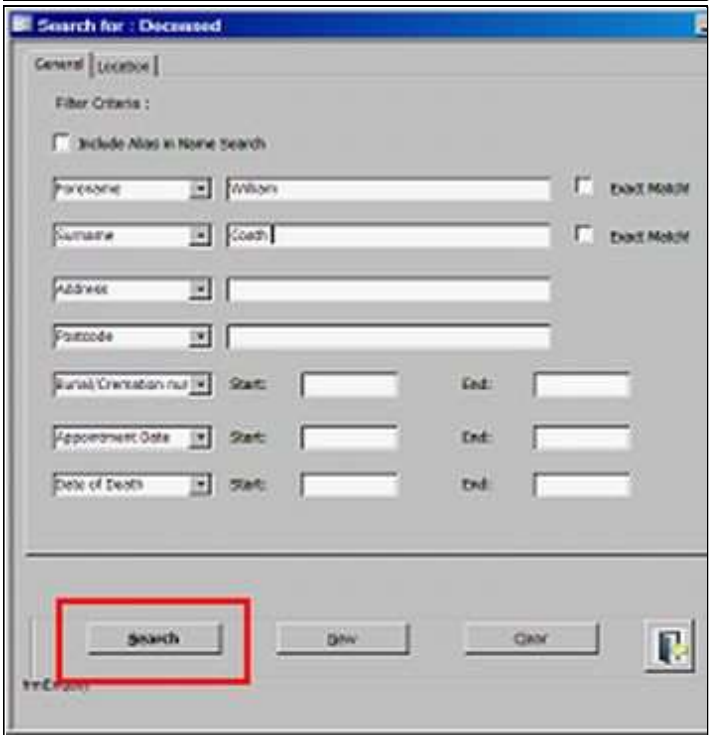
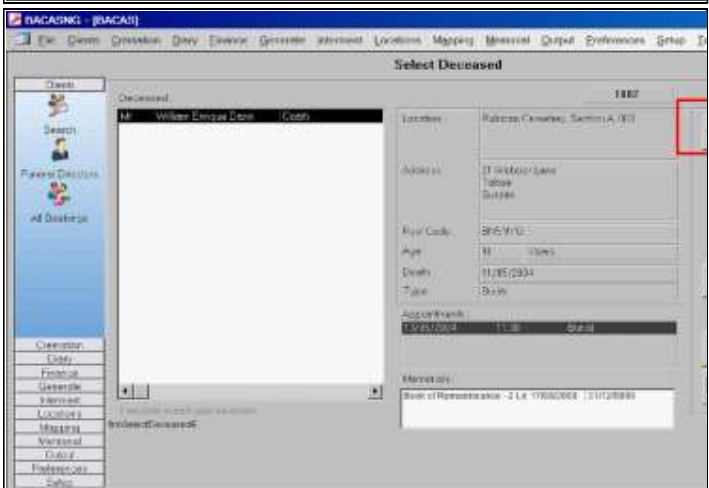
Generate numeric:

Username: 6701 Password:

Save

ClientSE

Tick the *Remote Booking* flag
Type in the 4 digit pin number for the Funeral Director in the *Username* field. This must be unique. (Alternatively click on the **Username** button to randomly generate a number)
Click on **Save**
Repeat the previous steps to set up another Funeral Director for Telephone bookings
Click on the **Close** button

	<p>Select Client from the Outlook bar on the left hand side. Select All Bookings from the expanded selection.</p>
	<p>Enter the Forename and Surname of the exhumed deceased and click on the Search button</p>
	<p>The Select Deceased screen will be displayed. Click on the Finger</p>

The screenshot shows the 'Burials' software window. At the top, it displays 'Deceased: Mr William Eamonn Ogan Coath', 'Date: Thu, 13/05/2004', and 'Time: 11:38'. Below this, it lists 'Funeral Director: Cookson and Smythe Funeral Director' and 'Service: Burial'. The 'Location' is 'Rathfarnham Cemetery - Section A - 003'. The 'Deceased' tab is selected, showing fields for 'Date' (13/05/2004), 'Time' (11:38), 'Privacy' (Public), 'Status' (Deceased), 'Obit' (Obituary), 'Location' (Rathfarnham Cemetery), 'Type of Service' (Burial), and 'Funeral Director' (Cookson and Smythe Funeral Director). On the right, there are fields for 'Title', 'Forenames', 'Surname', 'Maidenname', 'Other name', 'Address Line 1' through 'Address Line 6', and 'Post Code' (D10 910).

The Burial/Cremation/Scattering/Exhumation record for the deceased will be displayed.

Created with the Standard Edition of HelpNDoc: [Generate Kindle eBooks with ease](#)

Search for a Booking for an Applicant

The screenshot shows the 'Clients' section of the Outlook bar. It contains icons for 'Search', 'Funeral Directors', and 'All Bookings'. The 'Search' icon is highlighted, indicating it is the selected option.

Select **Clients** from the *Outlook bar* on the left hand side.
Select **All Bookings** from the expanded selection.

The screenshot shows the 'Search for : Deceased' window. It has tabs for 'General' and 'Location'. Under 'Filter Criteria', there is a checkbox for 'Include Alias in Name Search'. The 'Applicant Name' field is highlighted with a red box and contains the text 'Kate Roman'. Other fields include 'Surname', 'Address', 'Postcode', 'Burial/Cremation no.', 'Appointment Date', and 'Date of Death'. At the bottom, the 'Search' button is highlighted with a red box, along with 'New' and 'Clear' buttons.

The *Search for Deceased* screen will be displayed.
Change the Forename label to Applicant by clicking on the drop down arrow and scrolling up to find Applicant.
Enter the name of the applicant and click on the **Search** button

Select Deceased

Deceased: **Mr William Enrique Dann Coath**

Location: Rubican Cemetery, Section A, 003

Address: 21 Webber Lane
Tahoe
Sussex

Post Code: BN5 9YG

Age: 91 Years

Death: 11/05/2004

Type: Burial

Appointments: 13/05/2004 11:30 Burial

Memorials: Book of Remembrance - 2 Lir 17/08/2008 31/12/9999

1 records match your selection
ItemSelected:DeceasedE

The *Select Deceased* screen will be displayed.
Click on the **Finger**

Burials

Deceased: **Mr William Enrique Dann Coath** Date: **Thu, 13/05/2004** Time: **11:30**

Funeral Dir.: **Cookson and Smythe Funeral Director** Service: **Burial**

Location: **Rubican Cemetery - Section A - 003**

Initial Info | Deceased Details | Burial Details | Service Details | Music | Applicant | Memorials | Misc. | Finance | VO

Title: Mrs
Forenames: Kate
Surname: Roman
Maidenname:
Other name:
Address Line 1: 21 Webber Lane,
Address Line 2: Tahoe,
Address Line 3: Sussex
Address Line 4:
Address Line 5:
Address Line 6:
Post Code: BN5 9YG
Telephone:
Mobile:
Email:

Relationship: Nearest Surviving R
Relationship Details: Daughter
Occupation: Doctor

Grave Owner
Deceased Address
Select Applicant

The
Burial/Cremation/Scattering/*Exhumation*
record for the deceased will be
displayed.



Created with the Standard Edition of HelpNDoc: [Full-featured EBook editor](#)

Cremation




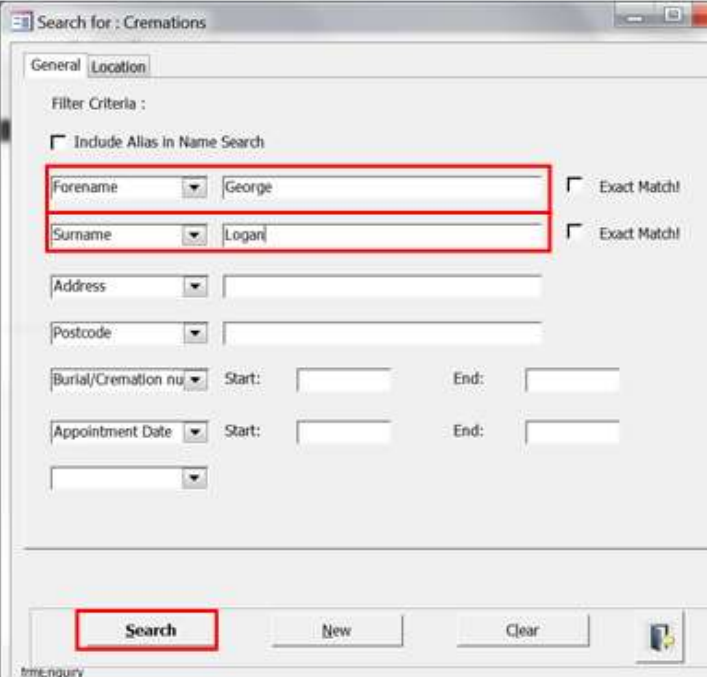
Cremation

- [Create a Disposal Appointment from the Cremation record](#)
- [Enter Disposal Details For the Burial of Ashes](#)
- [Enter Disposal Details For Strewing of Ashes](#)
- [Enter Disposal Details for the Storing of Ashes](#)
- [Enter Disposal Details For Placement of Ashes in a Niche](#)
- [Enter Disposal Details for Ashes on Temporary Deposit](#)
- [Enter Disposal Details for the Collection of Ashes](#)
- [Reset Disposal Details for a cremation](#)
- [Record medical papers inspection for a cremation](#)
- [Record the attendant doctor for a cremation](#)
- [Record the certifying doctor for a cremation](#)
- [Record the Medical Referee for a cremation](#)
- [Record the Coroner for a cremation](#)
- [Record when a cremation is carried over to the next day](#)
- [Search for a Cremation Record by Register Number](#)

	<ul style="list-style-type: none"> • Search for a Cremation Record by Deceased Name
<div> <div>Clients</div> <div>Cremation</div> <div></div> <div>Cremation</div> <div></div> <div>Strewing</div> </div>	Strewing <ul style="list-style-type: none"> • Search for a Strewing by register number • Search for a Strewing by Deceased name

Created with the Standard Edition of HelpNDoc: [What is a Help Authoring tool?](#)

Create a Disposal Appointment from the Cremation record

	<p>Select Cremation from the Outlook bar on the left hand side.</p> <p>Select Cremation from the expanded selection</p>
	<p>The <i>Search for: Cremation</i> screen will be displayed.</p> <p>Enter the <i>Forename</i> of the deceased</p> <p>Enter the <i>Surname</i> of the deceased</p> <p>Click on the Search button</p>

Select Deceased

Deceased : **1103**

Mr	George Fisher	Logan
1 records match your selection		

Disposal : Interred Witnessed - 06/03/2015
 Location : Rubican Cemetery Section G - 4
 Address : 6 Bond Street, Tahoe, Sussex
 Post Code : BN6 8TF
 Age : 88 Years
 Death : 01/07/2008
 Type : Full Service

Appointments :
 04/02/2015 10:00 Cremation

Memorials :

The *Selected Deceased* screen will be displayed

Click on the **Selection Finger** to open the cremation record

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**
 Funeral Director : **John Turner** Service : **Full Service**
 Location : **Mount Tallac Crematorium** **1103**

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | **Disposal** | Memorials | Misc. | Finance

Appointment : 1904_2503

* Date : 04/02/2015 Client Request
 * Time : 10:00

Privacy : Public
 Status : Medical Forms Outstanding

* Diary : Mount Tallac Crematorium
 * Location : Mount Tallac Crematorium
 Type of Service : Full Service
 Funeral Director : John Turner

Deceased : 3715

Title : Mr
 Forenames : George Fisher
 Surname : Logan
 Maidenname :
 Other name :
 Address Line 1 : 6 Bond Street,
 Address Line 2 : Tahoe,
 Address Line 3 : Sussex
 Address Line 4 :
 Address Line 5 :
 Address Line 6 :
 Post Code : BN6 8TF

Comments :

Martin Caxton - 02/07/2008 00:00

The cremation will open on the *Initial Info* tab

Click on the **Disposal** Tab
 Click on the **Edit** pencil

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**
 Funeral Director : **John Turner** Service : **Full Service**
 Location : **Mount Tallac Crematorium** **Complete 1103**

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | **Disposal** | Memorials | Misc. | Finance

Cremation Date : 04/02/2015

Disposal : Reset Disposal Information Find Time

Date : 06/03/2015 Time : 14:30

Methods :
 Method : Interred Witnessed
 Container : Metal Urn

Temporary Remarks
 Family present

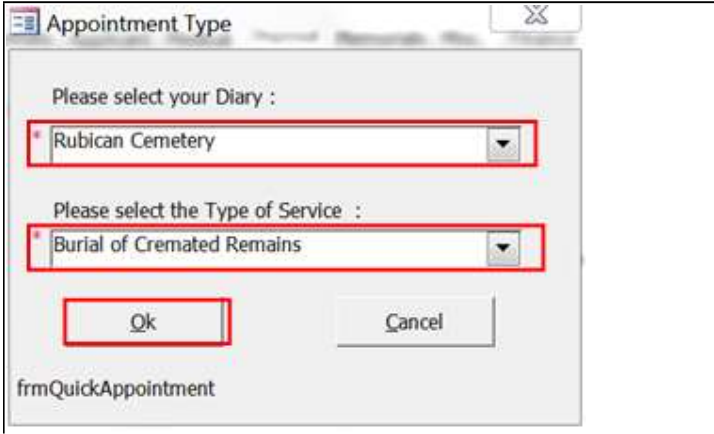
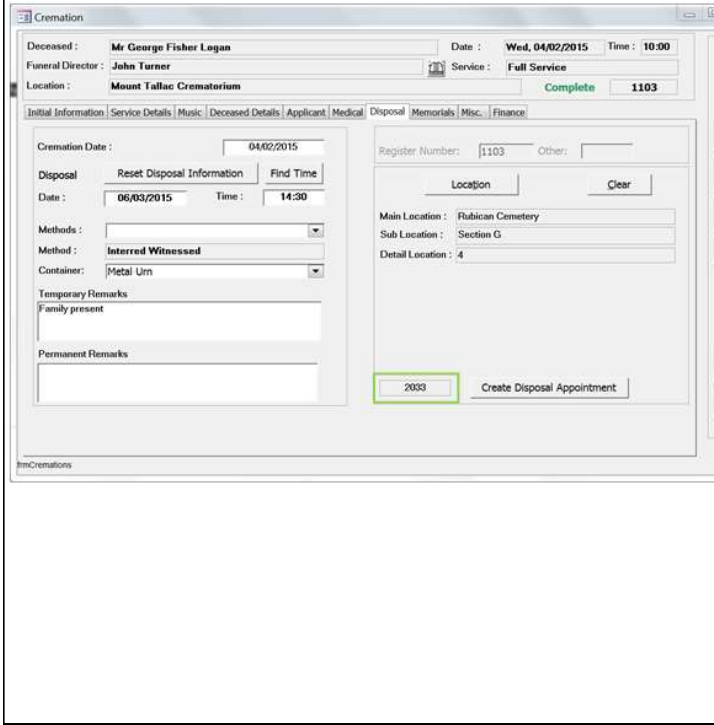
Permanent Remarks

Register Number : 1103 Other :
 Location : Clear
 Main Location : Rubican Cemetery
 Sub Location : Section G
 Detail Location : 4

0 **Create Disposal Appointment**

The disposal screen for the cremation will be displayed.
NOTE: In the example below the disposal information has already been entered. If the disposal information for the cremation hasn't been entered, return to [Cremation](#) and follow the appropriate notes.

Click on **Create Disposal Appointment**

 <p>The <i>Appointment Type</i> window will open</p> <p>Select the <i>Diary</i> for the disposal appointment</p> <p>Select the <i>Type of Service</i> for the disposal appointment</p> <p>Click on Ok</p>	<p>The <i>Appointment Type</i> window will open</p> <p>Select the <i>Diary</i> for the disposal appointment</p> <p>Select the <i>Type of Service</i> for the disposal appointment</p> <p>Click on Ok</p>
 <p>The <i>appointment id number</i> for the disposal appointment will appear on bottom right corner of the screen:</p> <p>Click on the Save button</p> <p>Click on the Close button to return to Select Deceased</p> <p>Search results</p> <p>You can now go to the diary selected for the disposal, on the disposal date and find the disposal appointment created at the disposal time.</p>	<p>The <i>appointment id number</i> for the disposal appointment will appear on bottom right corner of the screen:</p> <p>Click on the Save button</p> <p>Click on the Close button to return to Select Deceased</p> <p>Search results</p> <p>You can now go to the diary selected for the disposal, on the disposal date and find the disposal appointment created at the disposal time.</p>

Created with the Standard Edition of HelpNDoc: [Create cross-platform Qt Help files](#)

Enter Disposal Details for Ashes on Temporary Deposit

 <p>Select Cremation from the Outlook bar on the left hand side.</p> <p>Select Cremation from the expanded selection</p>	<p>Select Cremation from the Outlook bar on the left hand side.</p> <p>Select Cremation from the expanded selection</p>
---	---

The *Search for: Cremation* screen will be displayed.

Enter the *Forename* of the deceased

Enter the *Surname* of the deceased

Click on the **Search** button

The *Selected Deceased* screen will be displayed

Click on the **Selection Finger** to open the cremation record

The cremation will open on the *Initial Info* tab

Click on the **Disposal** Tab
Click on the **Edit** pencil

The screenshot shows the 'Cremation' window with the 'Disposal' tab active. The 'Disposal' section is highlighted with a red box. It contains the following fields:

- Disposal: Reset Disposal Information Find Time
- Date: 06/03/2015 Time: 14:30
- Methods: Awaiting Instructions - Letter Sent
- Method: Awaiting Instructions - Letter Sent
- Container: Polycontainer
- Temporary Remarks: 1st reminder 04/03/2015
- Permanent Remarks
- Register Number: 1103 Other:
- 0 Create Disposal Appointment

The *Disposal* screen for the cremation will be displayed. Enter the *Date* and *Time* of the disposal if known. Select the *Method* for the disposal. (This should indicate that the ashes are on temporary deposit whilst awaiting instruction from the applicant) Enter Temporary and /or Permanent remarks as required. Click on the **Save** button. Click on the **Close** button to close the cremation booking and return to the diary.

Created with the Standard Edition of HelpNDoc: [Free HTML Help documentation generator](#)

Enter Disposal Details for the Collection of Ashes

The screenshot shows the Outlook bar with three options: Clients, Cremation, and Strewing. The 'Cremation' option is highlighted with a red box.

Select **Cremation** from the Outlook bar on the left hand side.

Select **Cremation** from the expanded selection

The screenshot shows the 'Search for: Cremations' window. The 'General' tab is selected. The 'Filter Criteria' section has the following fields:

- Forename: George
- Surname: Logan
- Address
- Postcode
- Burial/Cremation number
- Appointment Date

The 'Search' button is highlighted with a red box.

The *Search for: Cremations* screen will be displayed.

Enter the *Forename* of the deceased

Enter the *Surname* of the deceased

Click on the **Search** button

Deceased : **Mr George Fisher Logan** 1103

Disposal : 0
Location :

Address : 6 Bond Street, Tahoe, Sussex

Post Code : BN6 8TF
Age : 88 Years
Death : 27/01/2015
Type : Full Service

Appointments :
04/02/2015 10:00 Cremation

Memorials :

1 records match your selection

The *Selected Deceased* screen will be displayed

Click on the **Selection Finger** to open the cremation record

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**
Funeral Director : **John Turner** Service : **Full Service** 1103

Location : **Mount Talla Crematorium**

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | **Disposal** | Memorials | Misc. | Finance

Appointment : 1904 2503 Deceased : 3715

* Date : 04/02/2015 Client Request
* Time : 10:00

Privacy : Public
Status : Medical Forms Outstanding

* Diary :
* Location : Mount Talla Crematorium
Type of Service : Full Service
View Funeral Dir. Private Clear

Funeral Director : John Turner

Title : Mr Address :
Forenames : George Fisher
Surname : Logan
Maidenname :
Other name :
Address Line 1 : 6 Bond Street,
Address Line 2 : Tahoe,
Address Line 3 : Sussex
Address Line 4 :
Address Line 5 :
Address Line 6 :
Post Code : BN6 8TF + Add

Comments :

The cremation will open on the *Initial Info* tab

Click on the **Disposal** Tab
Click on the **Edit** pencil

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**
Funeral Director : **John Turner** Service : **Full Service** Complete 1103

Location : **Mount Talla Crematorium**

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | **Disposal** | Memorials | Misc. | Finance

Cremation Date : 04/02/2015

Disposal : Reset Disposal Information Find Time

Date : 08/02/2015 Time : 14:30
Methods :
Method : Removed by Funeral Director
Container : Metal Urn

Temporary Remarks :
Permanent Remarks : Funeral Director representative: Owen Myers

Register Number : 1103 Other :
Collector :
Title :
Forenames :
Surname :
Address Line 1 :
Address Line 2 :
Address Line 3 :
Address Line 4 :
Address Line 5 :
Address Line 6 :
Post Code : 0 Create Disposal Appointment

The *Disposal* screen for the cremation will be displayed.
Enter the *Date* and *Time* of the disposal if known.
Select the *Method* for the disposal. (This should indicate collection of the ashes)
Enter Temporary and /or Permanent remarks as required.

As you have selected a *Collection* method in step 10 you will be able to select the funeral director or applicant as the collector:

Select either the Funeral Director or the applicant from the *Collector* selection list

The Funeral Director /Applicant contact details will be displayed on the disposal screen

Click on the **Save** button.

Click on the **Close** button to close the cremation booking and return to the diary

Created with the Standard Edition of HelpNDoc: [Write EPub books for the iPad](#)

Enter Disposal Details For Placement of Ashes in a Niche



Select **Cremation** from the Outlook bar on the left hand side.

Select **Cremation** from the expanded selection

Search for: Cremations

General Location

Filter Criteria :

☐ Include Alias in Name Search

Forename ☐ Exact Match!

Surname ☐ Exact Match!

Address

Postcode

Burial/Cremation no Start: End:

Appointment Date Start: End:

Search New Clear

Enquiry

The *Search for: Cremation* screen will be displayed.

Enter the *Forename* of the deceased

Enter the *Surname* of the deceased

Click on the **Search** button

Deceased : 1103

Mr George Fisher Logan

Disposal : 0

Location : 6 Bond Street, Tahoe, Sussex

Post Code : BN6 8TF

Age : 88 Years

Death : 27/01/2015

Type : Full Service

Appointments :

Date	Time	Service
04/02/2015	10:00	Cremation

Memorials :

1 records match your selection

The *Selected Deceased* screen will be displayed

Click on the **Selection Finger** to open the cremation record

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium 1103

Initial Information Service Details Music Deceased Details Applicant Medical **Disposal** Memorials Misc Finance

Appointment : 1904_2503 Deceased : 3715

Date : 04/02/2015 Client Request

Time : 10:00

Privacy : Public

Status : Medical Forms Outstanding

Diary : Mount Tallac Crematorium

Location : Mount Tallac Crematorium

Type of Service : Full Service

View Funeral Dir. Private Clear

Funeral Director : John Turner

Title : Mr

Forenames : George Fisher

Surname : Logan

Maidenname :

Other name :

Address Line 1 : 6 Bond Street,

Address Line 2 : Tahoe,

Address Line 3 : Sussex

Address Line 4 :

Address Line 5 :

Address Line 6 :

Post Code : BN6 8TF

Comments :

The cremation will open on the *Initial Info* tab

Click on the **Disposal** Tab

Click on the **Edit** pencil

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium Complete 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Cremation Date : 04/02/2015

Disposal Reset Disposal Information Find Time

Date : 06/03/2015 Time : 14:30

Methods :
 Method : Placed in Niche
 Container : Polycontainer

Temporary Remarks
 Large Family group to attend

Permanent Remarks

Register Number : 1103 Other :
 Location Clear
 Main Location :
 Sub Location :
 Detail Location :

0 Create Disposal Appointment

The *Disposal* screen for the cremation will be displayed.

1. Enter the *Date* and *Time* of the disposal if known.
2. Select the *Method* for the disposal. (This should indicate Placement in Niche)

Enter Temporary and /or Permanent remarks as required

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium Complete 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Cremation Date : 04/02/2015

Disposal Reset Disposal Information Find Time

Date : 06/03/2015 Time : 14:30

Methods :
 Method : Placed in Niche
 Container : Polycontainer

Temporary Remarks
 Large Family group to attend

Permanent Remarks

Register Number : 1103 Other :
 Location Clear
 Main Location :
 Sub Location :
 Detail Location :

0 Create Disposal Appointment

As you have selected a *Placement in Niche* method in step 10 you will be able to record the location for the ashes:

Click on the **Location** button

Location Criteria Form

Type : All

Main Location

Reference : End Grave : Clear

Select New Grave New Position Exit

frmCriteriaGraveSelection

The *Location Criteria Form* will open:

NOTE: If the location where the ashes are to be scattered/interred already exists on the system you do not need to carry out this step and you can go straight to the next step

Click on **New Position**
The *New Location Wizard* will open:
Select the *Cemetery* for the new position
Select the *Section* for the new position
Enter the *Detail Location* for the new position
Click on the **Create** button

Use this screen to create a new Detail Location

Mount Tallac Crematorium - Remembrance Chapel Vellum Plaque Wall 1

Cemetery :

Section :

☒ Single ☐ Range

Type :

Detail Location :

Additional Reference :

Consecrated ☐

Exit

frmWizNewGrave

Location Criteria Form

Type :

Main Location :

Sub Location :

Detail Location :

Reference : End Grave :

frmCriteriaGraveSelection

You will be returned to the *Location Criteria Form*

Select the *Main Location* for the ashes

Select the *Section* for the ashes

Select the *Detail Location* for the ashes

Click on the **Select** button

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**

Funeral Director : **John Turner** Service : **Full Service**

Location : **Mount Tallac Crematorium** **1103**

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Cremation Date : **04/02/2015** Register Number : **1103** Other :

Disposal

Date : **06/03/2015** Time : **14:30**

Methods :

Container :

Temporary Remarks
Large Family group to attend

Permanent Remarks

frmCremations


The *Location Criteria* form will close and the location for the placed ashes will be displayed on the disposal screen

NOTE: It is not possible to create a disposal appointment from the cremation record for placement of ashes for BACASNG versions 9 or earlier. You will need to go the relevant diary page and manually create a booking with appointment type *Disposal of remains from crematorium*

Click on the **Save** button.


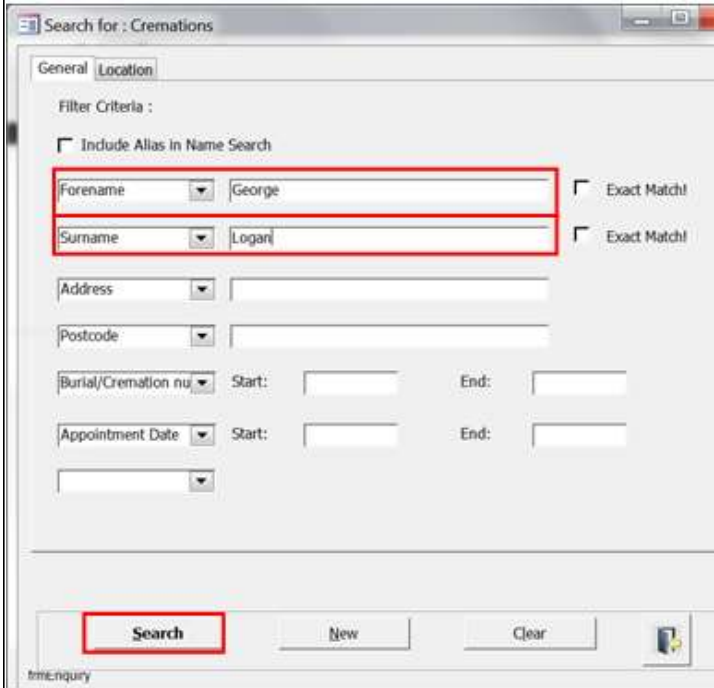
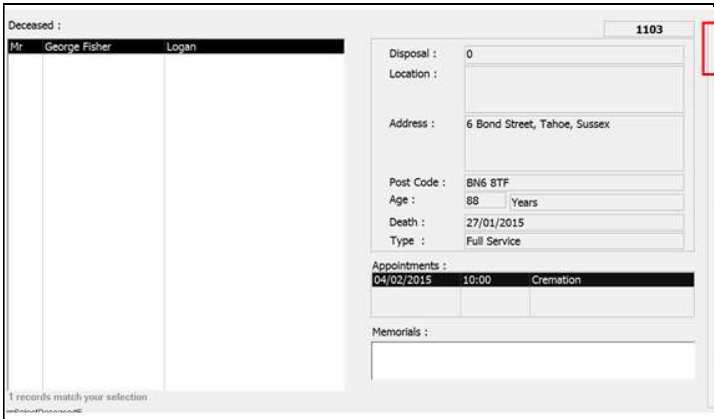
Click on the **Close** button to



return to the diary 

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Enter Disposal Details for the Storing of Ashes

	<p>Select Cremation from the Outlook bar on the left hand side.</p> <p>Select Cremation from the expanded selection</p>
	<p>The <i>Search for: Cremation</i> screen will be displayed.</p> <p>Enter the <i>Forename</i> of the deceased</p> <p>Enter the <i>Surname</i> of the deceased</p> <p>Click on the Search button</p>
	<p>The <i>Selected Deceased</i> screen will be displayed</p> <p>Click on the Selection Finger to open the cremation record</p>

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | **Disposal** | Memorials | Misc. | Finance

Appointment 1904 2503 Deceased 3715

* Date : 04/02/2015 Client Request

* Time : 10:00

Privacy : Public

Status : Medical Forms Outstanding

* Diary : Mount Tallac Crematorium

* Location : Mount Tallac Crematorium

Type of Service : Full Service

View Funeral Dir. Private Clear

Funeral Director : John Turner

Title : Mr Address

Forenames : George Fisher

Surname : Logan

Maidenname :

Other name :

Address Line 1 : 6 Bond Street,

Address Line 2 : Tahoe,

Address Line 3 : Sussex

Address Line 4 :

Address Line 5 :

Address Line 6 :

Post Code : BN6 8TF + Add

Comments :

The cremation will open on the *Initial Info* tab

Click on the **Disposal** Tab
Click on the **Edit** pencil

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium Complete 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | **Disposal** | Memorials | Misc. | Finance

Cremation Date : 02/01/2015

Disposal Reset Disposal Information Find Time

Date : 06/03/2015 Time : 14:30

Methods :

Method : Stored 6 Months

Container : Polycontainer

Temporary Remarks

Family abroad - ashes in storage until they return

Permanent Remarks

Register Number : 1103 Other :

Location Clear

Main Location :

Sub Location :

Detail Location :

0 Create Disposal Appointment

The *Disposal* screen for the cremation will be displayed.
Enter the *Date* and *Time* of the disposal if known.
Select the *Method* for the disposal. (This should indicate that the ashes are to be stored)
Enter Temporary and /or Permanent remarks as required.

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium Complete 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | **Disposal** | Memorials | Misc. | Finance

Cremation Date : 02/01/2015

Disposal Reset Disposal Information Find Time

Date : 06/03/2015 Time : 14:30

Methods :

Method : Stored 6 Months

Container : Polycontainer

Temporary Remarks

Family abroad - ashes in storage until they return

Permanent Remarks

Register Number : 1103 Other :

Location Clear

Main Location :

Sub Location :

Detail Location :

0 Create Disposal Appointment

As you have selected a Storage method in step 10 you will be able to record the location where the ashes are stored:
Click on the **Location** button:

Location Criteria Form

Type : All

Main Location : Mount Tallac Crematorium

Sub Location : Chaucer Crematorium, HazleHead, Remembrance Chapel~Vellum Plaque Wall 1, Sequoia Garden, Storage, Yew Garden

Detail Location :

Reference : End Grave : Clear

Select New Grave New Position Exit

frmCriteriaGraveSelection

The *Location Criteria Form* will open:
 Select the *Main Location* for the ashes
 Select the *Section* for the ashes
 Click on the **Select** button

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium Complete 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Cremation Date : 04/02/2015 Register Number : 1103 Other :

Disposal Reset Disposal Information Find Time

Date : 06/03/2015 Time : 14:30

Methods : Method : Stored 6 Months Container : Polycontainer



Temporary Remarks
Family abroad - ashes in storage until they return

Permanent Remarks

0 Create Disposal Appointment

frmCremations

The *Location Criteria* form will close and the location will be returned to the disposal screen

Click on the Save button. 
 Click on the Close button to close the cremation booking and return to the diary. 

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Enter Disposal Details For Strewing of Ashes

Clients

Cremation

Strewing

Select **Cremation** from the Outlook bar on the left hand side.

Select **Cremation** from the expanded selection

Search for: Cremations

General Location

Filter Criteria :

☐ Include Alias in Name Search

Forename ☐ Exact Match!

Surname ☐ Exact Match!

Address

Postcode

Burial/Cremation number Start: End:

Appointment Date Start: End:

Search New Clear

time: inquiry

The *Search for: Cremation* screen will be displayed.

Enter the *Forename* of the deceased

Enter the *Surname* of the deceased

Click on the **Search** button

Deceased : Mr George Fisher Logan 1103

Disposal : 0

Location :

Address : 6 Bond Street, Tahoe, Sussex

Post Code : BN6 8TF

Age : 88 Years

Death : 27/01/2015

Type : Full Service

Appointments :

04/02/2015	10:00	Cremation
------------	-------	-----------

Memorials :

1 records match your selection

The *Selected Deceased* screen will be displayed

Click on the **Selection Finger** to open the cremation record

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium 1103

Initial Information Service Details Music Deceased Details Applicant Medical Disposal Memorials Misc Finance

Appointment 1904 2503

Date : 04/02/2015 Client Request

Time : 10:00

Privacy : Public

Status : Medical Forms Outstanding

Diary : Mount Tallac Crematorium

Location : Mount Tallac Crematorium

Type of Service : Full Service

View Funeral Dir. Private Clear

Funeral Director : John Turner

Deceased 3715

Title: Mr

Forenames: George Fisher

Surname: Logan

Maidenname:

Other name:

Address Line 1: 6 Bond Street,

Address Line 2: Tahoe,

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code: BN6 8TF

Comments :

The cremation will open on the *Initial Info* tab

Click on the **Disposal** Tab

Click on the **Edit** pencil

The screenshot shows the 'Cremation' form with the 'Disposal' tab selected. The 'Disposal' section is highlighted with a red box. It contains fields for 'Date' (18/02/2015), 'Time' (14:30), 'Methods' (Scatter Witnessed), and 'Container'. There are also 'Temporary Remarks' and 'Permanent Remarks' text areas. The 'Cremation Date' is 04/02/2015. The 'Register Number' is 1103. The 'Location' button is visible on the right side of the form.

The *Disposal* screen for the cremation will be displayed.
Enter the *Date* and *Time* of the disposal if known.
Select the *Method* for the disposal. (This should indicate Strewing of Ashes)
Enter Temporary and /or Permanent remarks as required.

The screenshot shows the 'Cremation' form with the 'Disposal' tab selected. The 'Location' button is highlighted with a red box. The 'Disposal' section contains the same information as the previous screenshot. The 'Location' button is located on the right side of the form, below the 'Main Location' field.

As you have selected a *Strewing/Scattering* method in step 10 you will be able to record the location for the ashes:
Click on the **Location** button.

The screenshot shows the 'Location Criteria Form'. It has a 'Type' dropdown set to 'All'. The 'Main Location' field is empty. At the bottom, there are buttons for 'Select', 'New Grave', 'New Position' (highlighted with a red box), and 'Exit'. There are also 'Reference' and 'End Grave' fields with a 'Clear' button.

The *Location Criteria Form* will open:
NOTE: If the location where the ashes are to be scattered already exists on the system you do not need to carry out these steps and you can go straight to the next step

Click on **New Position**

The *New Location Wizard* will open:
Select the *Cemetery* for the new position
Select the *Section* for the new position
Enter the *Detail Location* for the new position
Click on the **Create** button

Use this screen to create a new Detail Location

Mount Tallac Crematorium - Sequoia Garden - Rose Bed 1

Cemetery :

Section :

☒ Single ☐ Range

Type :

Detail Location :

Additional Reference :

Consecrated ☐

frmWizNewGrave

Exit Create

Location Criteria Form

Type :

Main Location :

Sub Location :

Detail Location :

Reference : End Grave : Clear

Select New Grave New Position Exit

frmCriteriaGraveSelection

You will be returned to the *Location Criteria Form*
 Select the *Main Location* for the ashes
 Select the *Section* for the ashes
 Select the *Detail Location* for the ashes
 Click on the **Select** button

Cremation

Deceased : Date : Time :

Funeral Director : Service :

Location : Complete 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Cremation Date :

Disposal : Find Time

Date : Time :

Methods :

Method :

Container :

Temporary Remarks

Permanent Remarks

Register Number : Other :

Location Clear

Main Location :
 Sub Location :
 Detail Location :

0

frmCremations

The *Location Criteria* form will close and the location for the scattered remains will be displayed on the disposal screen
NOTE: Follow these notes to create a disposal appointment for the strewing from the cremation record:
[Create a Disposal Appointment from the Cremation Record](#)


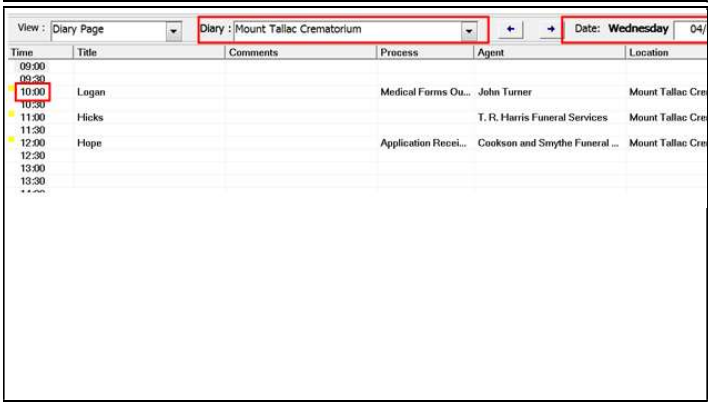
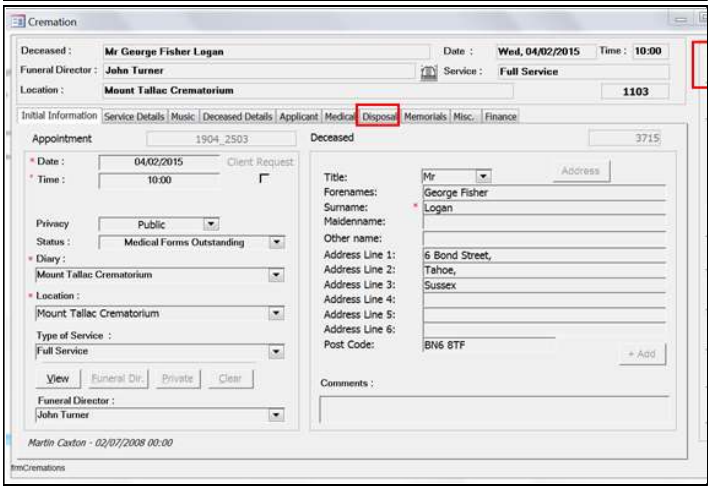
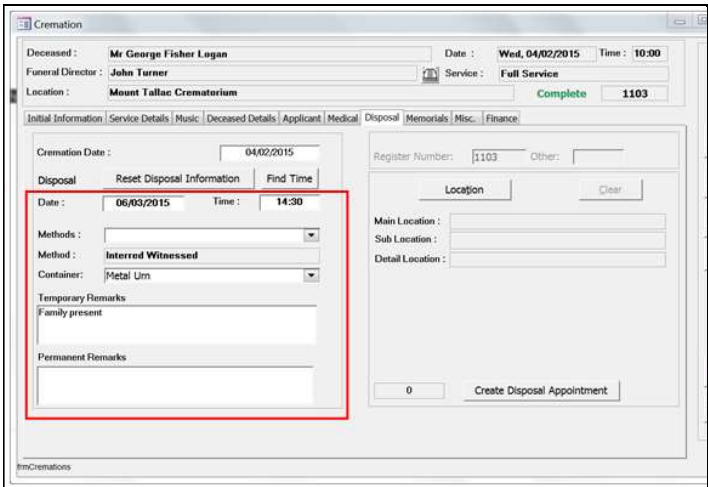
Click on the **Save** button.



Click on the **Close** button to return to the diary.



Enter Disposal Details For the Burial of Ashes

	<p>Select Diary from the Outlook bar on the left hand side.</p> <p>Select Show Diary from the expanded selection.</p>
	<p>The <i>Appointment Diary</i> screen will be displayed.</p> <p>Select the correct <i>Diary</i> for the cremation</p> <p>Select the <i>Date</i> of the cremation</p> <p>All bookings for that diary page for that date will be displayed.</p> <p>Double click on the time of the cremation in question.</p>
	<p>The cremation will open on the <i>Initial Info</i> tab</p> <p>Click on the Disposal Tab</p> <p>Click on the Edit pencil</p>
	<p>The <i>Disposal</i> screen for the cremation will be displayed.</p> <p>Enter the <i>Date</i> and <i>Time</i> of the disposal if known.</p> <p>Select the <i>Method</i> for the disposal. (This should indicate a burial or interment)</p> <p>Select a <i>Container</i> for the ashes</p> <p>Enter Temporary and /or Permanent remarks as required.</p>

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00
 Funeral Director : John Turner Service : Full Service
 Location : Mount Talla Crematorium Complete 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Cremation Date : 04/02/2015 Register Number: 1103 Other:
 Disposal: Reset Disposal Information Find Time
 Date : 06/03/2015 Time : 14:30
 Methods :
 Method : Interred Witnessed
 Container: Metal Urn
 Temporary Remarks
 Family present
 Permanent Remarks

Main Location :
 Sub Location :
 Detail Location :
 0 Create Disposal Appointment

As you have selected a burial/Interment Method in step 9 you will be able to record the location for the ashes:
 Click on the **Location** button.

Location Criteria Form

Type : All
 Main Location :
 Reference : End Grave : Clear
 Select New Grave New Position Exit

Use this screen to create a new Grave

Rubican Cemetery - Section G - 4
 Cemetery : Rubican Cemetery
 Section : Section G
 Single Range
 Type : Graves
 Grave Reference : 4
 Additional Reference :
 Type : Cremated Remains Grave
 Max Coffins : 0 Consecrated ☐
 Max Ashes : 4
 Exit Create

The *Location Criteria* Screen will open:

NOTE: If the location where the ashes are to be scattered/interred already exists on the system you do not need to carry out these steps and you can go straight to the next step

Click on **New Grave**

The New Location Wizard will open:

Select the *Cemetery* for the new grave

Select the *Section* for the new grave

Enter the *Grave Reference* for the new grave

Select the *Grave Type*

Amend the *Max Coffins* and *Max Ashes* Fields if necessary.

Click on the **Create** button

You will be returned to the *Location Criteria Form*

Location Criteria Form

Type : Graves

Main Location : Rubican Cemetery

Sub Location : Section C, Section D, Section E, Section F, Section G, Section H

Detail Location : 1, 2, 3, 4

Reference : End Grave : Clear

Select New Grave New Position Exit

frmCriteriaGraveSelection

Select the Main Location for the ashes

Select the *Section* for the ashes
Select the **Detail Location** for the ashes

Click on the **Select** button

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium Complete 1103

Initial Information Service Details Music Deceased Details Applicant Medical Disposal Memorials Misc Finance

Cremation Date : 04/02/2015

Disposal Reset Disposal Information Find Time

Date : 06/03/2015 Time : 14:30

Methods : Method : Interred Witnessed Container : Metal Urn

Temporary Remarks Family present

Permanent Remarks

Register Number: 1103 Others:

Location Clear

Main Location : Rubican Cemetery

Sub Location : Section G

Detail Location : 4

0 Create Disposal Appointment

frmCremations

The *Location Criteria* form will close and the location for the interred remains will be displayed on the disposal screen

NOTE: If you wish to create a disposal appointment from the cremation record, follow these notes: [Create A Disposal Appointment From the Cremation Record](#)

1. Click on the **Save** button.



2. Click on the **Close** button to return to the diary.



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Record medical papers inspection for a cremation

Clients

Cremation

Cremation

Strewing

Select **Cremation** from the Outlook bar on the left hand side.

Select **Cremation** from the expanded selection

The *Search for: Cremation* screen will be displayed.

Enter the *Forename* of the deceased

Enter the *Surname* of the deceased

Click on the **Search** button

The *Selected Deceased* screen will be displayed

Click on the **Selection Finger** to open the cremation record

The cremation will open on the *Initial Info* tab

Click on the **Misc** Tab
Click on the **Edit** pencil

The *Miscellaneous* screen for the cremation will be displayed
Click on the **Add Entry** button for the *Categories* section of the screen

The *Add Items* window will open

Select *Medical Inspectors* as the Category from the selection list
(If *Medical Inspectors* doesn't appear as a category then follow this link: [Set Up Medical Inspectors](#) before proceeding.)

Type in the *Name and address* of the person who applied to inspect the papers

Click on the **Add** button

The person who applied to inspect the medical papers will be recorded (green box below)

Click on the **Save** button

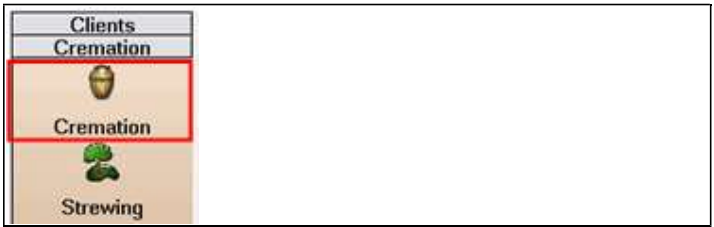
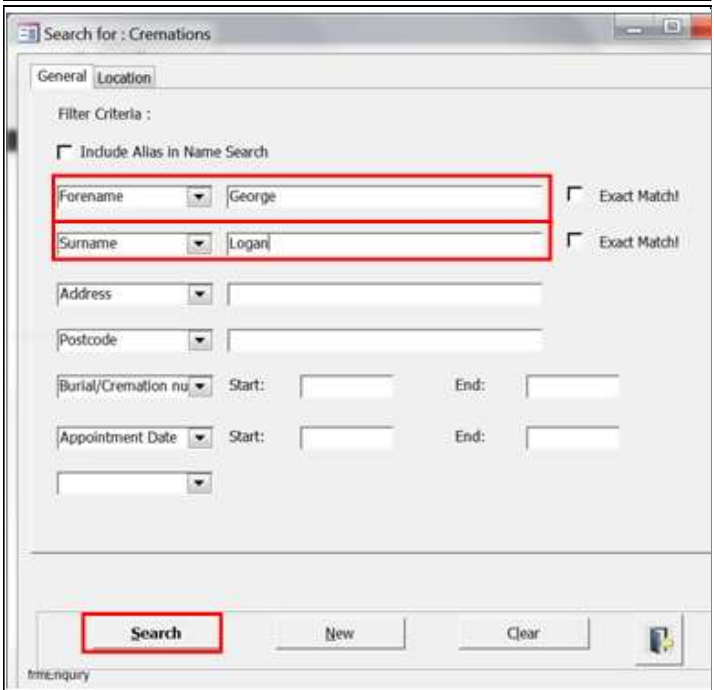
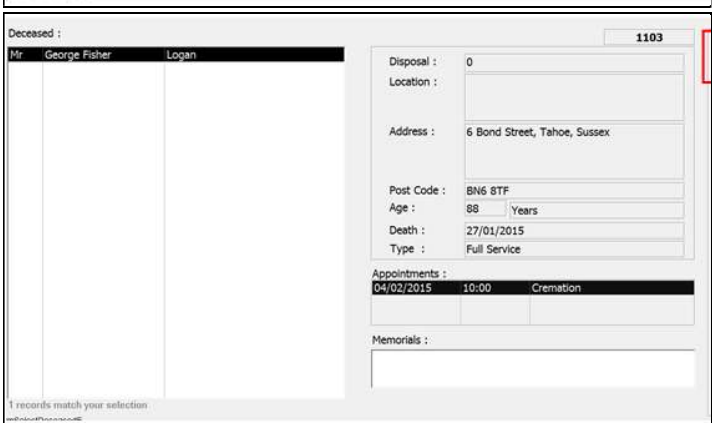
Click on the **Close** button to return to *Deceased Results* screen

NOTE: It is required by law that the Cremation Register (follow this link

to Print a cremation register) displays the details of the medical papers inspector. If this is not the case please call the Help Desk on 08702 402 217 as an amendment to your report is required.

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Record the attendant doctor for a cremation

	<p>Select Cremation from the Outlook bar on the left hand side.</p> <p>Select Cremation from the expanded selection</p>
	<p>The <i>Search for: Cremation</i> screen will be displayed.</p> <p>Enter the <i>Forename</i> of the deceased</p> <p>Enter the <i>Surname</i> of the deceased</p> <p>Click on the Search button</p>
	<p>The <i>Selected Deceased</i> screen will be displayed</p> <p>Click on the Selection Finger to open the cremation record</p>

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**

Funeral Director : **John Turner** Service : **Full Service**

Location : **Mount Tallac Crematorium** 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | **Medical** | Disposal | Memorials | Misc. | Finance

Appointment : 1904_2503 Deceased : 3715

* Date : 04/02/2015 Client Request

* Time : 10:00

Privacy : Public

Status : Medical Forms Outstanding

* Diary : Mount Tallac Crematorium

* Location : Mount Tallac Crematorium

Type of Service : Full Service

View Funeral Dir. Private Clear

Funeral Director : John Turner

Deceased

Title : Mr

Forenames : George Fisher

Surname : Logan

Maidenname :

Other name :

Address Line 1 : 6 Bond Street,

Address Line 2 : Tahoe,

Address Line 3 : Sussex

Address Line 4 :

Address Line 5 :

Address Line 6 :

Post Code : BN6 8TF

+ Add

Comments :

The cremation will open on the *Initial Info* tab

Click on the **Medical** Tab
Click on the **Edit** pencil

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**

Funeral Director : **John Turner** Service : **Full Service**

Location : **Mount Tallac Crematorium** 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | **Medical** | Disposal | Memorials | Misc. | Finance

Attendee : View Select Clear

Certifier : View Select Clear

Coroner : View Select Clear

Referee : View Select Clear

imCremations

The *Medical* screen for the cremation will be displayed.
Click on the **Select** button for *Attendant*

Search for : Clients

General

Filter Criteria :

☒ Show both Attendants and Certifiers

Role : Medical Attendant

Forename : Barry

Surname : Barlow

Address :

Postcode :

Search New Clear

The *Search for: Clients* window will open

Tick the *Show both Attendants and Certifiers* box.

Enter the forename of the attending doctor in the *Forename* field.

Enter surname of the attending doctor in the *Surname* field.

Click on the **Search** button

Medical Attendant Information

Client is dead ☐ BACAS ID: 3928

Barry Barlow

General Other Info History

Frequently Used Seldom Used Never Used

Title Dr Address

Forenames: Barry

Surname: Barlow

Address Line 1: Fairfield Medical Centre

Address Line 2: 15 Chapel Lane

Address Line 3: Tahoe

Address Line 4: Sussex

Address Line 5:

Address Line 6:

Post Code: BN16 3RT

Telephone 1:

Mobile:

+ Add

The *Medical Attendant information* screen will open:
Check that the correct details are displayed for the attending doctor.
Click on the **Selection Finger** to select this doctor

Cremation

Deceased: Mr George Fisher Logan Date: Wed, 04/02/2015 Time: 10:00

Funeral Director: John Turner Service: Full Service

Location: Mount Taitae Crematorium 1103

Initial Information Service Details Music Deceased Details Applicant Medical Disposal Memorials Misc Finance

Attendant: Dr Barry Barlow - Fairfield Medical Centre View Select Clear

Certifier: View Select Clear

Coroner: View Select Clear

Referee: View Select Clear

You will be returned to the *Medical* tab for the cremation record and the Attending doctor will be displayed.
Click on the **Save** button
Click on the **Close** button to return to *Deceased Results* screen

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Record the certifying doctor for a cremation



Select **Cremation** from the Outlook bar on the left hand side.

Select **Cremation** from the expanded selection

Search for: Cremations

General Location

Filter Criteria :

☐ Include Alias in Name Search

Forename ☐ Exact Match!

Surname ☐ Exact Match!

Address

Postcode

Burlal/Cremation num Start: End:

Appointment Date Start: End:

time: inquiry

The *Search for: Cremation* screen will be displayed.

Enter the *Forename* of the deceased

Enter the *Surname* of the deceased

Click on the **Search** button

Deceased :

Mr George Fisher Logan

Disposal : 0

Location :

Address : 6 Bond Street, Tahoe, Sussex

Post Code : BN6 8TF

Age : 88 Years

Death : 27/01/2015

Type : Full Service

Appointments :

04/02/2015	10:00	Cremation
------------	-------	-----------

Memorials :

1 records match your selection

The *Selected Deceased* screen will be displayed

Click on the **Selection Finger** to open the cremation record

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium 1103

Initial Information Service Details Music Deceased Details Applicant Medical Disposal Memorials Misc Finance

Appointment 1904_2503

Date : 04/02/2015 Client Request

Time : 10:00

Privacy Public

Status : Medical Forms Outstanding

Diary : Mount Tallac Crematorium

Location : Mount Tallac Crematorium

Type of Service : Full Service

View Funeral Dir Private Clear

Funeral Director : John Turner

Deceased 3715

Title: Mr

Forenames: George Fisher

Surname: Logan

Maidenname:

Other name:

Address Line 1: 6 Bond Street,

Address Line 2: Tahoe,

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code: BN6 8TF

Comments :

The cremation will open on the *Initial Info* tab

Click on the **Medical** Tab

Click on the **Edit** pencil

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tullac Crematorium 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Attendant : Dr Barry Barlow, Fairfield Medical Centre View Select Clear

Certifier : View **Select** Clear

Coroner : View Select Clear

Referee : View Select Clear

fmCremations

1. Click on the **Select** button for *Certifier*

Search for : Clients

General

Filter Criteria :

☒ Show both Attendants and Certifiers

Role : Medical Certifier

Forename : Simon Exact Match!

Surname : Wardron Exact Match!

Address :

Postcode :

Search New Clear

fmInquiry

The *Search for: Clients* window will open

Tick the *Show both Attendants and Certifiers* box.

Enter the forename of the Certifying doctor in the *Forename* field.

Enter surname of the Certifying doctor in the *Surname* field.

Click on the **Search** button

Medical Certifier Information

Client is dead ☐ BACAS ID: 2630

Simon Wardron

General | Other Info | History

☒ Frequently Used ☐ Seldom Used ☐ Never Used

Title : Mr Address :

Forenames : Simon

Surname : Wardron

Address Line 1 : East Surrey District Hospital,

Address Line 2 : Crawley Road,

Address Line 3 : Redhill,

Address Line 4 : Surrey

Address Line 5 :

Address Line 6 :

Post Code : RH8 4DF

Telephone 1 :

Mobile :

+ Add

fmCertifier

The *Medical Certifier information* screen will open:

Check that the correct details are displayed for the certifying doctor.

Click on the **Selection Finger** to select this doctor

You will be returned to the *Medical* tab for the cremation record and the certifying doctor will be displayed.

Click on the **Save** button
Click on the **Close** button to return to *Deceased Results* screen

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Record the Coroner for a cremation

Select **Cremation** from the Outlook bar on the left hand side.

Select **Cremation** from the expanded selection

The *Search for: Cremation* screen will be displayed.

Enter the *Forename* of the deceased

Enter the *Surname* of the deceased

Click on the **Search** button

Deceased : **Mr George Fisher Logan** 1103

Disposal : 0
Location :
Address : 6 Bond Street, Tahoe, Sussex
Post Code : BN6 8TF
Age : 88 Years
Death : 27/01/2015
Type : Full Service

Appointments :
04/02/2015 10:00 Cremation

Memorials :

1 records match your selection

The *Selected Deceased* screen will be displayed

Click on the **Selection Finger** to open the cremation record

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**
Funeral Director : **John Turner** Service : **Full Service**
Location : **Mount Talfac Crematorium** 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | **Medical** | Disposal | Memorials | Misc. | Finance

Appointment : 1904_2503 Deceased : 3715

* Date : 04/02/2015 Client Request
* Time : 10:00

Privacy : Public
Status : Medical Forms Outstanding

* Diary : Mount Talfac Crematorium
* Location : Mount Talfac Crematorium
Type of Service : Full Service

View Funeral Dir. Private Clear
Funeral Director : John Turner

Title : Mr
Forenames : George Fisher
Surname : Logan
Maidenname :
Other name :
Address Line 1 : 6 Bond Street,
Address Line 2 : Tahoe,
Address Line 3 : Sussex
Address Line 4 :
Address Line 5 :
Address Line 6 :
Post Code : BN6 8TF

Comments :

The cremation will open on the *Initial Info* tab

Click on the **Medical** Tab
Click on the **Edit** pencil

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**
Funeral Director : **John Turner** Service : **Full Service**
Location : **Mount Talfac Crematorium** 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | **Medical** | Disposal | Memorials | Misc. | Finance

Attendant : Dr Barry Barlow, Fairfield Medical Centre View Select Clear
Certifier : Mr Simon Wardron, East Surrey District Hospital, View Select Clear
Coroner : View **Select** Clear
Referee : View Select Clear

Click on the **Select** button for *Coroner*

The *Search for: Clients* window will open

Enter the forename of the Coroner doctor in the *Forename* field.

Enter surname of the Coroner doctor in the *Surname* field.

Click on the **Search** button

The *Coroner information* screen will open:

Check that the correct details are displayed for the Coroner.

Click on the **Selection Finger** to select this doctor

You will be returned to the *Medical* tab for the cremation record and the Coroner will be displayed.

Click on the **Save** button

Click on the **Close** button to return to *Deceased Results* screen

Record the Medical Referee for a cremation



Select **Cremation** from the Outlook bar on the left hand side.

Select **Cremation** from the expanded selection

The *Search for: Cremations* screen will be displayed.

Enter the *Forename* of the deceased

Enter the *Surname* of the deceased

Click on the **Search** button

The *Selected Deceased* screen will be displayed

Click on the **Selection Finger** to open the cremation record

The cremation will open on the *Initial Info* tab

Click on the **Medical** Tab
Click on the **Edit** pencil

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Talfan Crematorium 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Attendant : Dr Barry Barlow, Fairfield Medical Centre View Select Clear

Certifier : Mr Simon Wardron, East Surrey District Hospital, View Select Clear

Coroner : View Select Clear

Referee : View **Select** Clear

Click on the **Select** button for *Medical Referee*

Search for : Clients

General

Filter Criteria :

Role Medical Referee

Forename Brian Exact Match!

Surname Laudrup Exact Match!

Address

Postcode

Search New Clear

frmInquiry

The *Search for: Clients* window will open

Enter the forename of the Medical Referee in the *Forename* field.

Enter surname of the Medical Referee in the *Surname* field.

Click on the **Search** button

Medical Referee Information

Client is dead

BACAS ID: 2631

Brian Laudrup

General Other Info History

Frequently Used Seldom Used Never Used

Title Dr Address

Forenames: Brian

Surname: Laudrup

Address Line 1: 61 Park Grove,

Address Line 2: Tahoe,

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code: BN6 9YF

Telephone 1:

Mobile:

+ Add

frmClientE

The *Medical Referee information* screen will open:

Check that the correct details are displayed for the Medical Referee.

Click on the **Selection Finger** to select this doctor

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Taffan Crematorium 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc | Finance

Attendant : Dr Barry Barlow, Fairfield Medical Centre View Select Clear

Certifier : Mr Simon Wardron, East Surrey District Hospital View Select Clear

Coroner : View Select Clear

Referee : Dr Brian Laudrup - 61 Park Grove View Select Clear

You will be returned to the *Medical* tab for the cremation record and the Medical Referee will be displayed.

Click on the **Save** button
Click on the **Close** button to return to *Deceased Results* screen

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Record when a cremation is carried over to the next day

Clients

Cremation

Strewing

Select **Cremation** from the Outlook bar on the left hand side.

Select **Cremation** from the expanded selection

Search for: Cremations

General Location

Filter Criteria :

☐ Include Alias in Name Search

Forename George Exact Match!

Surname Logan Exact Match!

Address

Postcode

Burial/Cremation nu Start: End:

Appointment Date Start: End:

Search New Clear

time:enquiry

The *Search for: Cremation* screen will be displayed.

Enter the *Forename* of the deceased

Enter the *Surname* of the deceased

Click on the **Search** button

Deceased : **Mr George Fisher Logan** 1103

Disposal : 0
Location :
Address : 6 Bond Street, Tahoe, Sussex
Post Code : BN6 8TF
Age : 88 Years
Death : 27/01/2015
Type : Full Service

Appointments :
04/02/2015 10:00 Cremation

Memorials :

1 records match your selection

The *Selected Deceased* screen will be displayed

Click on the **Selection Finger** to open the cremation record

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**
Funeral Director : **John Turner** Service : **Full Service**
Location : **Mount Tallac Crematorium** 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | **Disposal** | Memorials | Misc. | Finance

Appointment : 1904 2503 Deceased : 3715

Date : 04/02/2015 Client Request
Time : 10:00

Privacy : Public
Status : Medical Forms Outstanding

Diary :
Location : Mount Tallac Crematorium
Type of Service : Full Service

View Funeral Dir. Private Clear

Funeral Director : John Turner

Title : Mr
Forenames : George
Surname : Fisher
Maidenname : Logan
Other name :
Address Line 1 : 6 Bond Street,
Address Line 2 : Tahoe,
Address Line 3 : Sussex
Address Line 4 :
Address Line 5 :
Address Line 6 :
Post Code : BN6 8TF

Comments :

The cremation will open on the *Initial Info* tab

Click on the **Disposal** Tab
Click on the **Edit** pencil

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**
Funeral Director : **John Turner** Service : **Full Service**
Location : **Mount Tallac Crematorium** 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | **Disposal** | Memorials | Misc. | Finance

Cremation Date : 05/02/2015

Disposal : Reset Disposal Information Find Time
Date : Time :
Methods :
Method : 0
Container :
Temporary Remarks
Permanent Remarks

Register Number : 1103 Other :
Location : Clear
Main Location :
Sub Location :
Detail Location :
0 Create Disposal Appointment

The *Disposal* screen for the cremation will be displayed.

Enter the actual date of the cremation in the *Cremation Date* field (Service date is highlighted by green box)

Click on the **Save** button


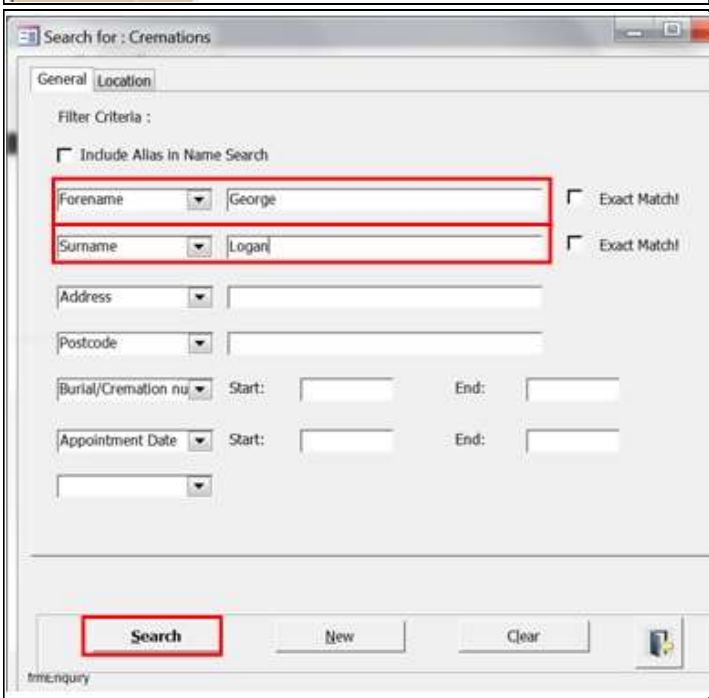
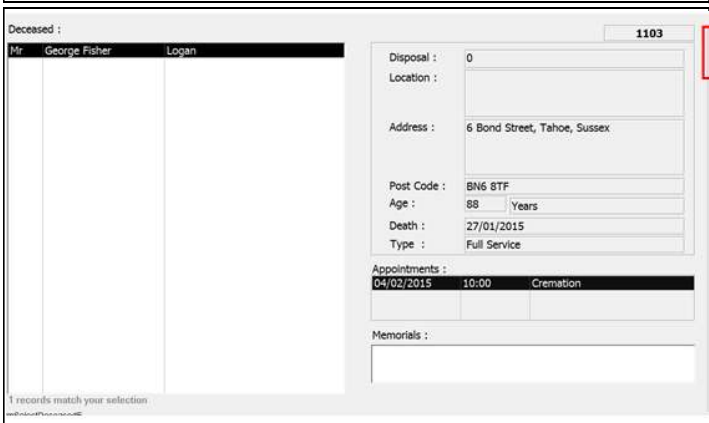
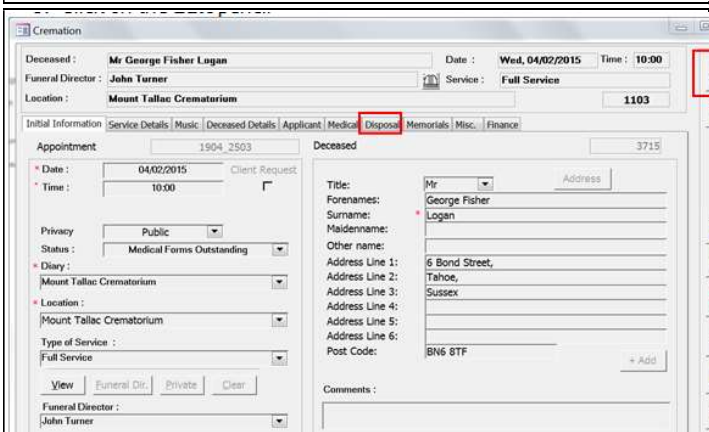
NOTE: The *Cremation Date*, not the *Service Date* should be displayed on the Cremation Certificate. If this is not the case please contact the Help Desk on 08702 401 217 so that we can amend the report for you.

Click on the **Close** button to return to the

Deceased Search screen



Reset Disposal Details for a cremation

	<p>Select Cremation from the Outlook bar on the left hand side.</p> <p>Select Cremation from the expanded selection</p>
	<p>The <i>Search for: Cremation</i> screen will be displayed.</p> <p>Enter the <i>Forename</i> of the deceased</p> <p>Enter the <i>Surname</i> of the deceased</p> <p>Click on the Search button</p>
	<p>The <i>Selected Deceased</i> screen will be displayed</p> <p>Click on the Selection Finger to open the cremation record</p>
	<p>The cremation will open on the <i>Initial Info</i> tab</p> <p>Click on the Disposal Tab</p> <p>Click on the Edit pencil</p>

The screenshot shows the 'Cremation' window for 'Mr George Fisher Logan'. The 'Disposal' tab is active, and the 'Reset Disposal Information' button is highlighted with a red rectangle. Other fields include 'Cremation Date: 04/02/2015', 'Date: 06/03/2015', 'Time: 14:30', 'Method: Awaiting Instructions - Letter Sent', and 'Container: Polycontainer'.

Click on **Reset Disposal Information**

The disposal method will be cleared down

The screenshot shows the 'Cremation' window for 'Mr George Fisher Logan'. The 'Disposal' tab is active. The 'Date' field is set to '12/03/2015' and 'Time' to '14:30'. The 'Method' is 'Removed by Family' and 'Container' is 'Polycontainer'. The 'Collector' dropdown is set to 'Tina Logan'. The 'Address Line 1' is '6 Bond Street,'. The 'Post Code' is 'BN6 8TF'. The 'Create Disposal Appointment' button is visible at the bottom.

Enter a new *Disposal Date* and *Disposal Time* if relevant
Select a new *Method*
Select a new *Container* if relevant

Amend Temporary or Permanent remarks if relevant.
Complete details on right hand side of the disposal screen (this will vary depending on new method selected)
Click on the **Save** button

Click on the **Close** button to return to the diary

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Search for a Cremation Record by Deceased Name



Select **Cremation** from the Outlook bar on the left hand side.

Select **Cremation** from the expanded selection

The *Search for: Cremation* screen will be displayed.

Enter the *Forename* of the deceased

Enter the *Surname* of the deceased

Click on the **Search** button

The *Selected Deceased* screen will be displayed

Click on the **Selection Finger** to open the cremation record

The cremation will open on the *Initial Info* tab

Click on the **Close** button to return to *Selected Deceased* results screen

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Search for a Cremation Record by Register Number



Select **Cremation** from the Outlook bar on the left hand side.

Select **Cremation** from the expanded selection

Search for : Cremations

General Location

Filter Criteria :

☐ Include Alias in Name Search

Forename ☐ Exact Match!

Surname ☐ Exact Match!

Address

Postcode

Burial/Cremation number Start: 1103 End:

Appointment Date Start: End:

tm:hqury

The *Search for: Cremation* screen will be displayed.

Enter the *Cremation Number* for the deceased

Click on the **Search** button

Select Deceased

Deceased :

Mr George Fisher Logan

Disposal : Interred Witnessed - 06/03/2015

Location : Rubican Cemetery Section G - 4

Address : 6 Bond Street, Tahoe, Sussex

Post Code : BN6 8TF

Age : 88 Years

Death : 01/07/2008

Type : Full Service

Appointments :

04/02/2015 10:00 Cremation

Memorials :

1 records match your selection

The *Selected Deceased* screen will be displayed

Click on the **Selection Finger** to open the cremation record

Cremation

Deceased : Mr George Fisher Logan Date: Wed, 04/02/2015 Time: 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium 1103

Initial Information Service Details Music Deceased Details Applicant Medical Disposal Memorials Misc Finance

Appointment 1904 2503 Deceased 3715

* Date : 04/02/2015 Client Request

* Time : 10:00

Privacy : Public

Status : Medical Forms Outstanding

* Diary : Mount Tallac Crematorium

* Location : Mount Tallac Crematorium

Type of Service : Full Service

View Funeral Dir. Private Clear

Funeral Director : John Turner

Martin Caxton - 02/07/2008 00:00

tm:Cremations

Title: Mr

Forenames: George Fisher

Surname: Logan

Maidenname:

Other name:

Address Line 1: 6 Bond Street,

Address Line 2: Tahoe,

Address Line 3: Sussex

Address Line 4:

Address Line 5:





Address Line 6:

Post Code: BN6 8TF

Comments:


The cremation will open on the *Initial Info* tab

Click on the **Close** button to return to *Selected Deceased* results screen

<div>Diary</div> <div>  Show Diary </div>	<p>Diary - Book a cremation, Burial or Strewing onto a diary page or customise the diary page</p> <ul style="list-style-type: none"> • Find a booking from the Diary • Register a Burial, Cremation, or Scattering Booking • Enter Service details for a booking • Enter Music Details for a booking: <ul style="list-style-type: none"> ◦ Amend A Music Entry On A Booking ◦ Delete Music From A Booking ◦ Add A Music Title From A Booking • Enter Deceased Details for a booking • Enter Applicant Details for a booking • Enter a Memorial from a booking • Record miscellaneous Information for a Booking • Check An Appointment Tick Box On A Booking • Auto Generate Fees for a Booking • Pick a fee for a booking • Add a fee manually to a booking • Enter Finance for a Booking • Add a Fee Manually For A Booking • Print Daily Paperwork • Set up a Reception Diary or Staff Diary
<div>Diary Times</div> <div>  Diary Times </div>	<p>Diary Times</p> <ul style="list-style-type: none"> • Edit a day type (set of Diary Times) • Set up an Exception Day • Set up Diary Times for a new Diary • Set up a new Day Type • View Diary Times for a working week • Set up new times for a working week • View existing Day Type (Diary Times)
<div>User Settings</div> <div>  User Settings </div>	<p>User Settings</p> <ul style="list-style-type: none"> • Add a new User • Add a New Diary for a User •
<div>Diary Colours</div> <div>  Diary Colours </div>	<p>Diary Colours</p> <ul style="list-style-type: none"> • View Booking Colour Codes •

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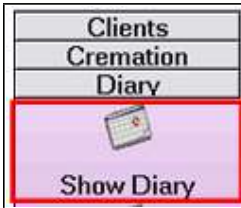
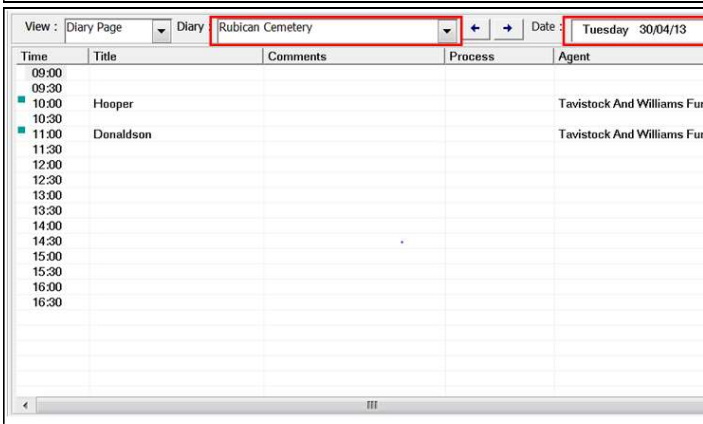
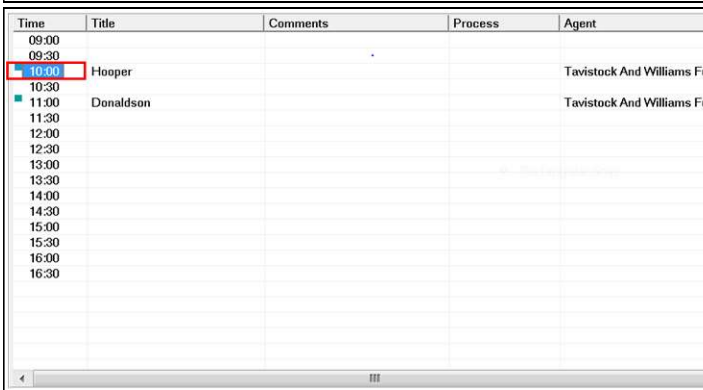
Show Diary

<div>Show Diary</div> <div>  Show Diary </div>	<p>Show Diary</p> <ul style="list-style-type: none"> • Find a booking from the Diary • Register a Burial, Cremation, or Scattering Booking • Enter Service Details For A Booking • Enter Music For A Booking <ul style="list-style-type: none"> ◦ Add a music title from a booking ◦ Delete a Music entry From A Booking
--	--

	<ul style="list-style-type: none"> ○ Amend a music entry on a booking ● Enter Deceased Details for a booking ● Enter applicant details for a booking ● Record miscellaneous information for a booking ● Check an appointment tick box on a booking ● Delete fees for a booking ● Generate fees from a booking ● Pick a fee for a booking ● Add a fee manually for a booking ● Print daily paperwork ● Set up a Reception Diary or Staff Diary ● Register a Booking from the Diary Page
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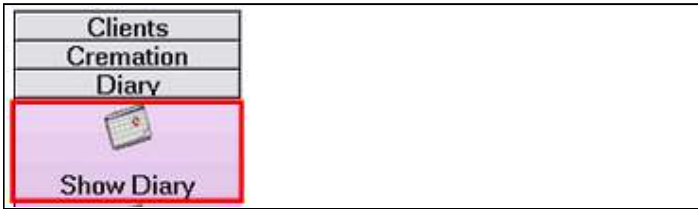
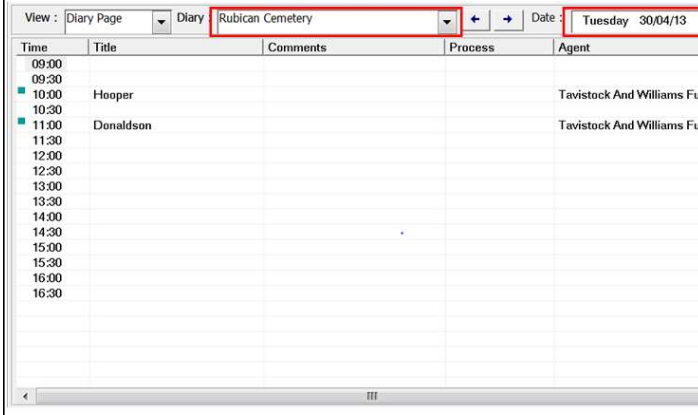
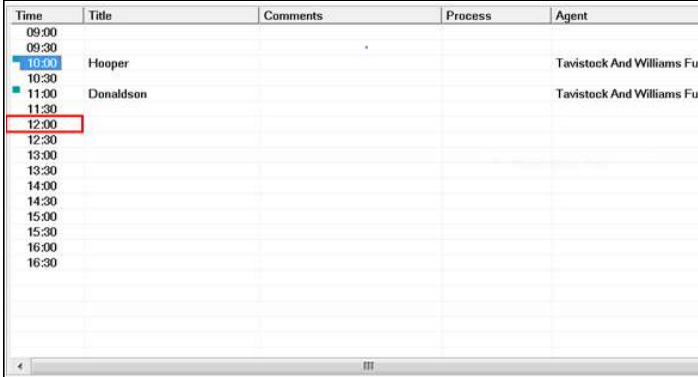

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Find a booking from the Diary

	<p>Select Diary from the Outlook bar on the left hand side. Select Show Diary from the expanded selection.</p>
	<p>The <i>Appointment Diary</i> screen will be displayed. Select the <i>Diary</i> required Set the <i>Date</i> required All bookings for that diary page for that date will be displayed</p>
	<p>Double click on the time of the booking you wish to open The booking record will open</p>

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Register a Burial, Cremation, or Scattering Booking

	<p>Select Diary from the Outlook bar on the left hand side. Select Show Diary from the expanded selection.</p>
	<p>The <i>Appointment Diary</i> screen will be displayed. Select the <i>Diary</i> required Set the <i>Date</i> required Any existing bookings for that diary page for that date will be displayed</p>
	<p>Double click on the time of the booking you wish to create.</p>
	<p>The <i>Appointment Type</i> window will open Select the appointment type using the drop-down arrow Select the location for the booking using the drop-down arrow Click on OK</p>

Burials

Deceased : **Provisional Booking** Date : **Tue, 30/04/2013** Time : **12:00**

Funeral Dir.: Service : 0

Location :

Initial Info | Deceased Details | Burial Details | Service Details | Music | Applicant | Memorials | Misc. | Finance | VO

Appointment 2010 Deceased 3906

Date : 30/04/2013 Client Request

Time : 12:00

Privacy : Public

Status : Application Received

Diary : Rubican Cemetery

Location : Rubican Cemetery

Type of Service : Burial

Funeral Director : Cookson and Smythe Funeral Director

Title : Mr Search Address

Forenames : Alistair

Surname : Bond

Maidenname :

Other name :

Address Line 1 : 23 Wilman Avenue

Address Line 2 : Sevenoaks

Address Line 3 : Kent

Address Line 4 :

Address Line 5 :

Address Line 6 :

Post Code : TN 13 4CY + Add

Comments : Web cast requested

A Provisional Booking Record will open on the *Initial Info* tab

NOTE: The other tabs in the picture below may vary from what you can see on your screen depending on whether you are creating a cremation, burial or scattering – don't worry about this.

1. Select a *Status* from the drop down list (optional – this will be displayed from the diary)
2. Select a *Type of Service* from the drop-down list
3. Select a *Funeral Director* from the drop-down list.
NOTE: If the Funeral Director isn't frequently used and doesn't appear on the drop down list it is possible to search for the funeral director within the booking or set up the Funeral Director within the booking.
4. Select the deceased *Title* from the drop-down list
5. Enter the *Forename* and *Surname* of the deceased
6. Enter *Maiden name* and *Other name* if appropriate
7. Enter the *Address* of the deceased

NOTE: if the last address for the deceased was a local institution such as a nursing home it may be quicker to click on the **Address** button and select the address from the *Frequently used addresses* list. If the institution does not appear on the *Frequently used addresses* list, then enter it manually and then click on **+Add** to add it to the list for use with future bookings.

8. Enter a *Postcode* for the deceased
9. Enter any *Comments* that you wish to be displayed

from the diary page.
10. Click on the **Save** button

You are now ready to enter
the registration details for
the deceased:

The screenshot shows the 'Burials' application window. The 'Deceased Details' tab is selected and highlighted with a red box. The form contains the following fields:

- Deceased:** Mr Alistair Bond
- Funeral Dir.:** Cookson and Smythe Funeral Director
- Date:** Tue, 30/04/2013
- Time:** 12:00
- Service:** Burial
- Location:** 0
- Initial Info:** Deceased Details (highlighted), Burial Details, Service Details, Music, Applicant, Memorials, Misc., Finance, VO
- Resident:** ☒ (highlighted with a red box)
- Gender:** [Dropdown]
- Marital Status:** [Dropdown]
- Occupation:** Retired
- Date of Death:** [Dropdown]
- Age:** [Dropdown]
- Body Part:** [Dropdown]
- Death Location:** [Dropdown] (+ Death Location, At Home)
- Registration Information:**
 - District:** [Dropdown] (+ District)
 - Sub District:** [Dropdown] (+ Sub)
 - Date:** [Dropdown]
 - Reference:** [Text]
- Remarks for the Register:** [Text area]

Click on the **Deceased Details** tab
Click on the **Edit Pencil**

The screenshot shows the 'Burials' application window with the following fields filled out:

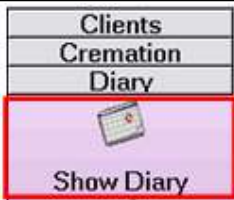
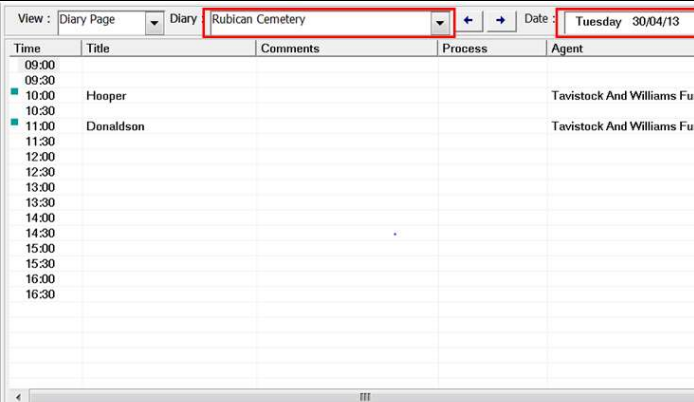
- Deceased:** Mr Alistair Bond
- Funeral Dir.:** Cookson and Smythe Funeral Director
- Date:** Tue, 30/04/2013
- Time:** 12:00
- Service:** Burial
- Location:** 0
- Initial Info:** Deceased Details (highlighted), Burial Details, Service Details, Music, Applicant, Memorials, Misc., Finance, VO
- Resident:** ☒ (highlighted with a red box)
- Gender:** Male
- Marital Status:** Widowed
- Occupation:** Retired
- Date of Death:** 27/04/2013
- Age:** 9 Years
- Body Part:** [Dropdown]
- Death Location:** 23 Wilman Avenue Sevenoaks Kent TN 13 4CJ
- Registration Information:**
 - District:** Kent
 - Sub District:** Sevenoaks
 - Date:** 29/04/2013
 - Reference:** 874523
- Remarks for the Register:** [Text area]

1. If the deceased lived in the parish/borough then tick the *Resident* flag.
2. Enter the *Date of Death*.
3. Enter the number of years/months/weeks/days/hours/minutes that the deceased lived in the *Age* field Leave this empty if the deceased was stillborn or a foetus
4. Select years/months/weeks/days/hours/minutes/Stillborn/Non-viable Foetus from the drop-down list.
5. Select the *Gender* of the deceased
6. Select the *Marital Status* of the deceased
7. Select the *Occupation* of the deceased
8. Select the *Death Location* of the deceased from the drop list. If the death location isn't on the drop down list, it can be entered and if required added to the drop-down list for future bookings by clicking on **+Death**

	<p>Location. Click on At Home if the deceased died at home.</p> <ol style="list-style-type: none"> 9. Select the <i>District</i> where the death was registered. If the District isn't on the drop down list, it can be entered and if required added to the drop-down list for future bookings by clicking on +District. 10. Select the <i>Sub District</i> where the death was registered. If the Sub District isn't on the drop down list, it can be entered and if required added to the drop-down list for future bookings by clicking on + Sub District. 11. Enter the <i>Date</i> the death was registered 12. Enter the registration number in the <i>Reference</i> field 13. Enter any <i>Comments</i> concerning the registration 14. Click on Save
--	--

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Enter Service Details For A Booking

	<p>Select Diary from the Outlook bar on the left hand side. Select Show Diary from the expanded selection.</p>
	<p>The <i>Appointment Diary</i> screen will be displayed. Select the <i>Diary</i> required Set the <i>Date</i> required All bookings for that diary page for that date will be displayed</p>

Time	Title	Comments	Process	Agent
09:00				
09:30				
10:00	Hooper			Tavistock And Williams F
10:30				
11:00	Donaldson			Tavistock And Williams F
11:30				
12:00				
12:30				
13:00				
13:30				
14:00				
14:30				
15:00				
15:30				
16:00				
16:30				

Double click on the time of the booking you wish to open
The booking record will open

The booking will open on the *Initial Info* tab

NOTE: The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this.

Click on the **Service Details** Tab
Click on the **Edit** pencil

Select the service *Denomination* from the drop-down list
Select an *Officiant* from the drop-down list.

NOTE: If the Officiant isn't frequently used and can't be found on the drop down list, you can search for the officiant within the booking or the officiant can be created from within the booking

Enter any *Special Instructions* for the service
Click on **Save**


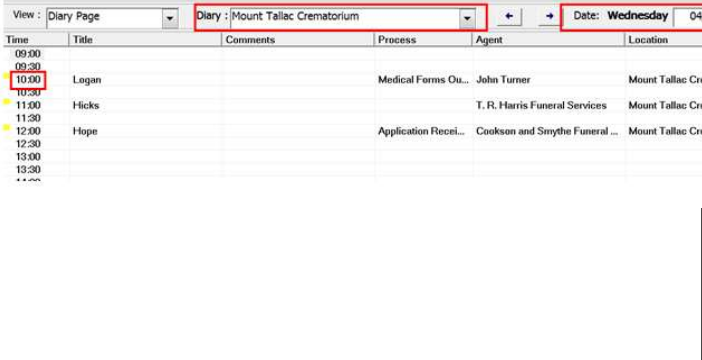
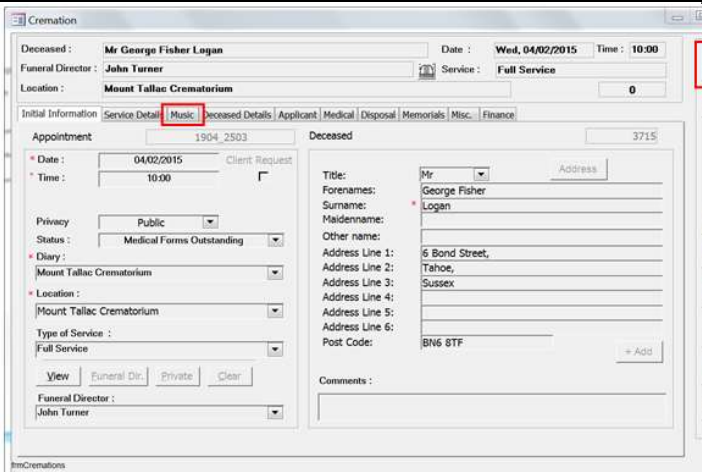
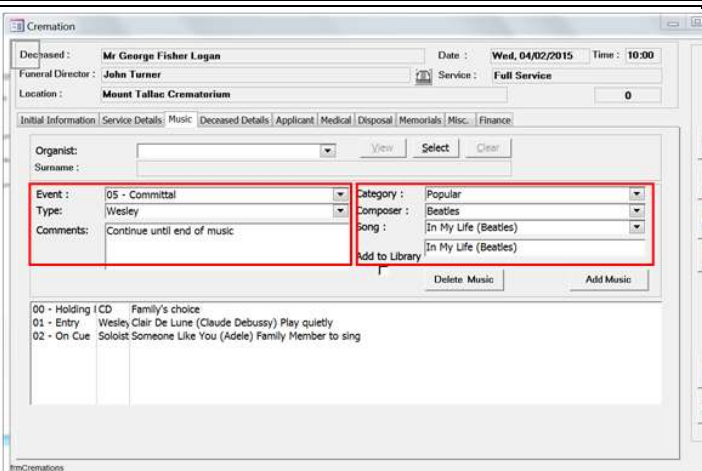
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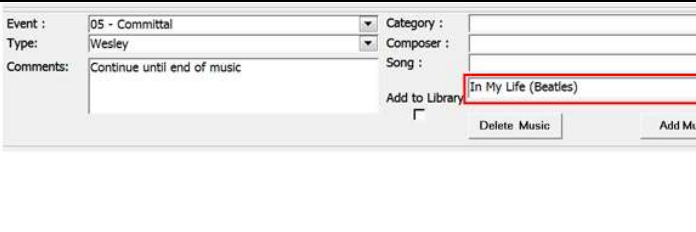
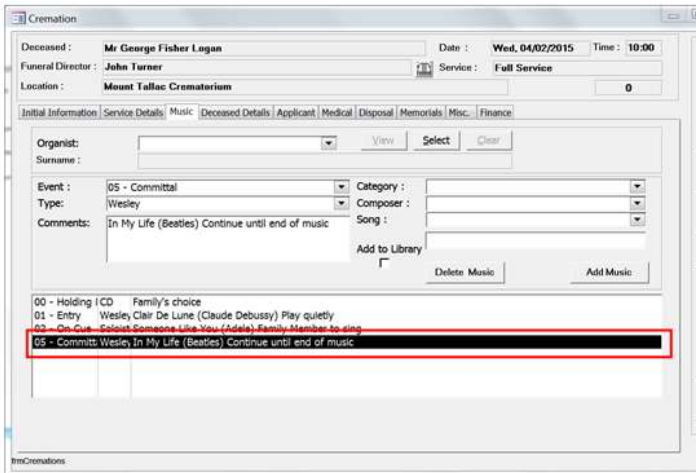
Music

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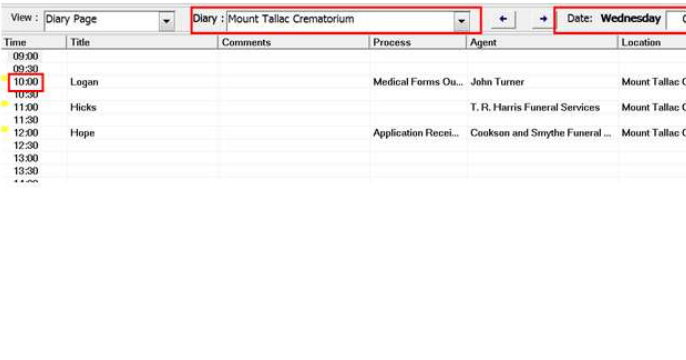
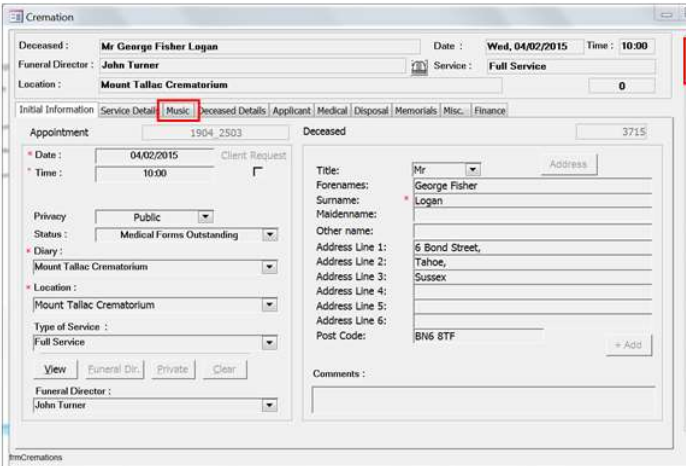
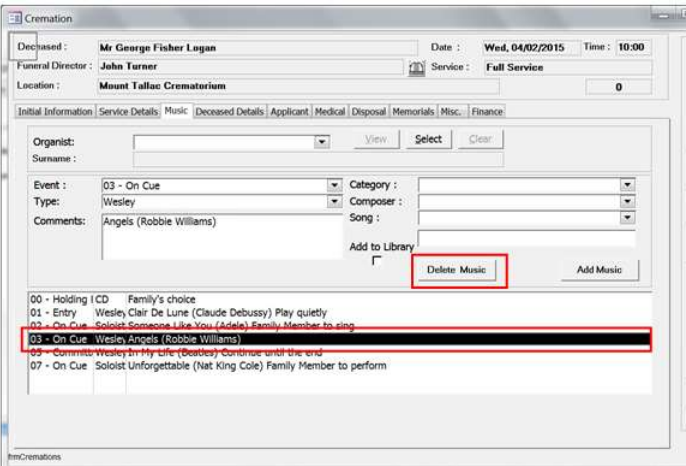
Enter Music For A Booking

NOTE: These notes are applicable to a Cremation, Burial

	or Scattering booking.
	<ol style="list-style-type: none"> 1. Select Diary from the Outlook bar on the left hand side. 2. Select Show Diary from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Appointment Diary</i> screen will be displayed. 2. Select the correct <i>Diary</i> for the booking 3. Select the <i>Date</i> of the booking 4. All bookings for that diary page for that date will be displayed 5. Double click on the time of the booking in question
	<ol style="list-style-type: none"> 1. The booking will open on the <i>Initial Info</i> tab 2. NOTE: The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this. 3. Click on the Music Tab 4. Click on the Edit pencil
	<ol style="list-style-type: none"> 1. The Music for the booking will be displayed. The screen shows that some music has already been added for this booking and the following instructions explain how to add a new piece of music: 2. If an organist is required for this event then select the organist from the drop down list – in this example an organist is not required as Wesley is used. 3. Select the Event from the <i>Event</i> selection list (Events can be added in any order and the music list will always display in the correct order of service).

	<ol style="list-style-type: none"> 4. Select the type of media from the <i>Type</i> drop down selection list. 5. Enter any comments required in the <i>Comments</i> field. 6. 7. If you wish to select Music from the Music Library: <ol style="list-style-type: none"> 1. Select the Category of music from the <i>Category</i> drop down selection list. 2. Select the Artist from the <i>Composer</i> selection list. 3. Select the song from the <i>Song</i> selection list for that Category and Artist 4. (If you can't find the Music title you wish the follow the instructions: 5. Add A Music Title From A Booking)
	<ol style="list-style-type: none"> 1. If you do not wish to use the Music Library, ignore the Category and Composer field and type the Song title and Composer name into the field shown 2. Click on Add Music
	<ol style="list-style-type: none"> 1. The Event will be added to the music list displayed in the bottom half of the screen 2. If you wish to add another event repeat the instructions from step 8. 3. Click on the Save button 4. Click on the Exit button to leave the booking and return to the diary page

Delete a Music entry From A Booking

	<p>NOTE: These notes are applicable to a Cremation, Burial or Scattering booking.</p>
	<ol style="list-style-type: none"> 1. Select Diary from the Outlook bar on the left hand side. 2. Select Show Diary from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Appointment Diary</i> screen will be displayed. 2. Select the correct <i>Diary</i> for the booking 3. Select the <i>Date</i> of the booking 4. All bookings for that diary page for that date will be displayed 5. Double click on the time of the booking in question
	<ol style="list-style-type: none"> 1. The booking will open on the <i>Initial Info</i> tab 2. NOTE: The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this. 3. Click on the Music Tab 4. Click on the Edit pencil
	<ol style="list-style-type: none"> 1. The Music for the booking will be displayed. 2. Click on the Music event that you wish to delete. 3. Click on the Delete Music button

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00
 Funeral Director : John Turner Service : Full Service
 Location : Mount Tallac Crematorium 0

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Organist : Surname : View Select Clear
 Event : 03 - On Cue Category :
 Type : Wesley Composer :
 Comments : Angels (Robbie Williams) Song :
 Add to Library Delete Music Add Music

00 - Holding I CD Family's choice
 01 - Entry Wesley Clair De Lune (Claude Debussy) Play quietly
 02 - On Cue Soloist Someone Like You (Adele) Family Member to sing
 05 - Commit: Wesley, In My Life (Beatles) Continue until the end
 07 - On Cue Soloist Unforgettable (Nat King Cole) Family Member to perform

1. The Event will be removed from the music list displayed in the bottom half of the screen.
2. Click on the **Save** button
3. Click on the **Exit** button to leave the booking and return to the diary page

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Obitus Music System

	<p>NOTE: These notes are applicable to a Cremation or Burial</p>
	<ol style="list-style-type: none"> 1. Select Diary from the Outlook bar on the left hand side. 2. Select Show Diary from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Appointment Diary</i> screen will be displayed. 2. Select the correct <i>Diary</i> for the booking 3. Select the <i>Date</i> of the booking 4. All bookings for that diary page for that date will be displayed 5. Double click on the time of the booking in question

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium

Initial Information Service Details **Music** Deceased Details Applicant Medical Disposal Memorials Misc. Finance

Appointment 1904 2503 Deceased 3715

* Date : 04/02/2015 Client Request

* Time : 10:00

Privacy : Public

Status : Medical Forms Outstanding

* Diary : Mount Tallac Crematorium

* Location : Mount Tallac Crematorium

Type of Service : Full Service

View Funeral Dir. Private Clear

Funeral Director : John Turner

Deceased

Title : Mr Address

Forenames : George Fisher

Surname : Logan

Maidenname :

Other name :

Address Line 1 : 6 Bond Street,

Address Line 2 : Tahoe,

Address Line 3 : Sussex

Address Line 4 :

Address Line 5 :

Address Line 6 :

Post Code : BN6 8TF + Add

Comments :

1. The booking will open on the *Initial Info* tab
2. **NOTE:** The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this.
3. Click on the **Music** Tab
4. Click on the **Edit** pencil

Cremation

Deceased : Provisional Booking Date : Fri, 23/06/2017 Time : 09:00

Funeral Director : Jamieson Chapel Service :

Location : Jamieson Chapel

Initial Information Service Details Music Deceased Details Applicant Medical Disposal Memorials Misc. Finance

Organist: Surname :

Music System : Obitus Edit Music Refresh Music

1. Select Obitus as the Music supplier in the Music System dropdown.
2. Hit the Save button (this will automatically register the appointment in the Obitus system)

Cremation

Deceased : Provisional Booking Date : Fri, 23/06/2017 Time : 09:00

Funeral Director : Jamieson Chapel Service :

Location : Jamieson Chapel

Initial Information Service Details Music Deceased Details Applicant Medical Disposal Memorials Misc. Finance

Organist: Surname :


Music System : Obitus Edit Music Refresh Music

Now hit the 'Edit Music' button

This will open the Obitus 'Music Service Details' website in your default web browser (it may be open behind other windows) at the Bacas appointment, Bacas will stay open in the background at the Music page. Note:

The Obitus website has a number of links across the top, one of which is 'Help Guide' which has helpful videos on using the site.

You can now select music in Obitus to be added to the appointment in Obitus. Click the Popular button to see a list of popular music.

1. Highlight tracks individually in the left hand list, which will load it into the 'Your Playlist' on the right.
2. Tracks in the 'Your Playlist' column can then be :
 1. dragged up or down in the list with the left mouse button
 2. the order of service selected in the dropdown  on each track
 3. or the track deleted with the 'dustbin' icon.
3. The total playable music time is displayed at the top right, each individual track time is displayed on the Track.

Available ✓

✓ The Lord's My Shepherd (Crimond) [C... 02:4

Cantemus Spalding

----- ▾

✚

The order of this list will be the order tracks are played during the service.

Save & Submit Cancel

Once all music is selected and modified, scroll to the bottom of the page where you can hit the Save and Submit button - if this is not done the music selections will be lost when the Obitus window is closed.

Obitus

Add New Service Dashboard Music Library Hymn Library My Site Help Guide Contact Us

Service Details

Provisional Booking At SW Middlesex Jamieson At 09:00 On Friday 23rd Jun

< Return To Dashboard Edit Service

Music

New

Webcasts

Not Available

Tributes

Not Available

After a few seconds, the page will close to the Service Details page, the music is now saved in Obitus and the browser window can be closed.

Cremation

Decedent : Provisional Booking Date : Fri, 23/06/2017 Time : 09:00

Funeral Director : A. H. Cheater Service : Committal Service

Location : Jamieson Chapel 0

Initial Information Service Details Music Deceased Details Applicant Medical Disposal Memorials Misc. Finance

Organist: View Select Clear

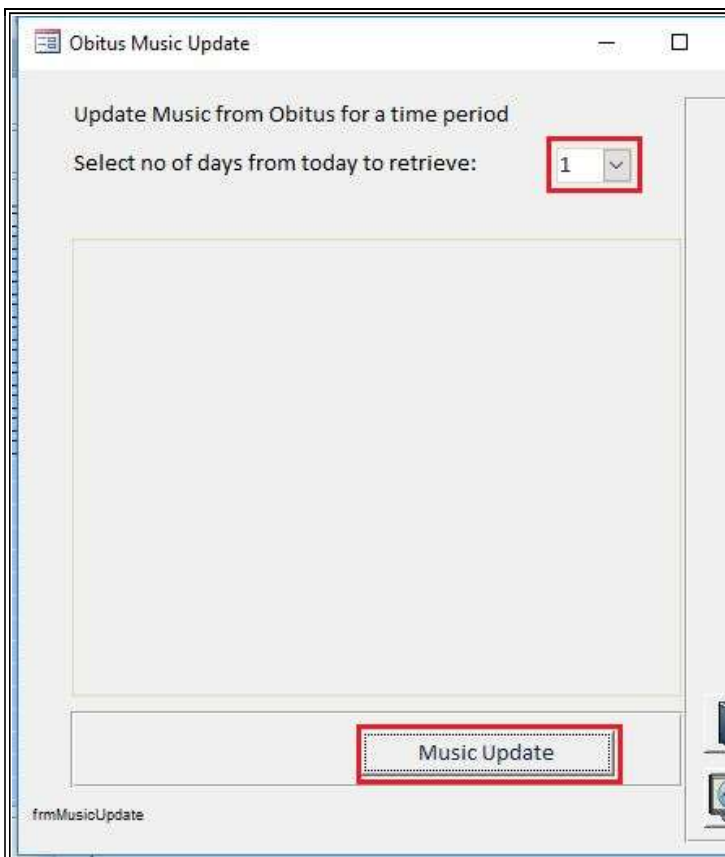
Surname :

Music System : Obitus

Edit Music

Refresh Music

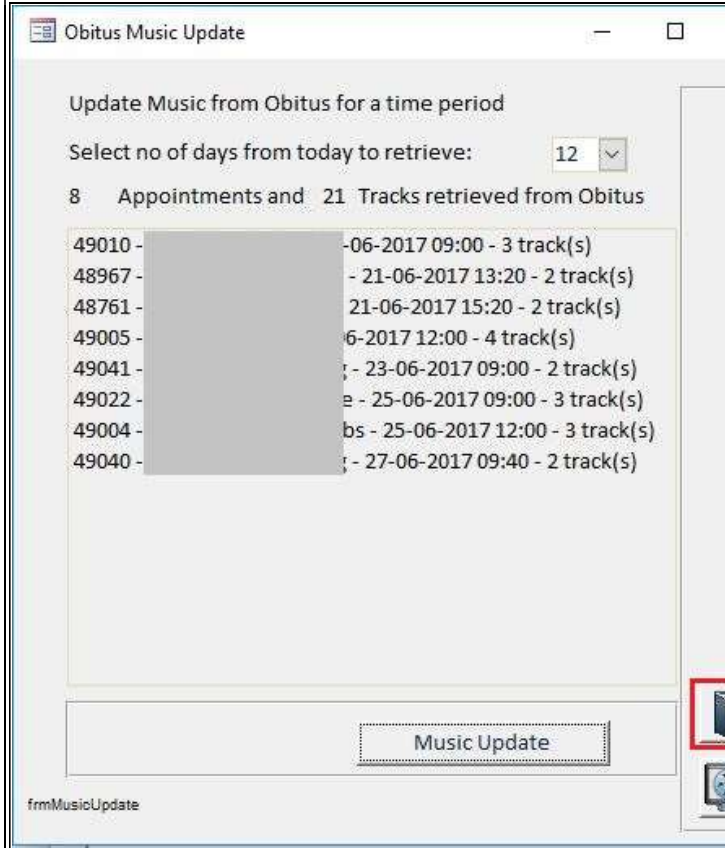
Music selected for the appointment is now stored only in the Obitus system and needs to be loaded into Bacas. R in the 'Your Playlist' column return to Bacas at the Music tab, hit the pencil, then hit the Refresh Music button



This will open the Obitus Music update window.

Select the number of days from now to retrieve music from Obitus for, then hit the Music Update button

This can take up to a minute to retrieve during which time the cursor will change to an hourglass - please be patient!



Upon return, all music for the number of days selected will be listed showing Appointment ID, Deceased Name, appointment date and time, and number of tracks, and they are now loaded into the Bacas database against each appointment. Now hit the close button.

Note: If you hit the Music Update button again by mistake, no damage will be done, the music is simply retrieved again and reloaded.

Cremation

Deceased: **Provisional Booking** Date: **Fri, 23/06/2017** Time: **09:00**

Funeral Director: **A. H. Cheater** Service: **Committal Service**

Location: **Jamieson Chapel** 0

Initial Information Service Details **Music** Deceased Details Applicant Medical Disposal Memorials Misc. Finance

Organist: View Select Clear

Surname:

Music System: **Obitus** Edit Music Refresh Music

1	Obitus: My Way(Frank Sinatra)
2	Obitus: The Lord's My Shepherd (Crimond) [C080a](Canterus Spalding)

Finally, reload the Music tab (hit another tab then the Music tab again) and the selected music will be displayed. Then hit the Save button then the Close button

Note: Obitus music can only be selected/amended by appointment on the Obitus site then reloaded into Bacas

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Enter Deceased Details for a booking

Clients
 Cremation
 Diary
Show Diary
 Diary Times
 User Settings
 Diary Colours
 Finance
 Generate
 Interment
 Locations
 Mapping
 Memorial
 Output
 Preferences
 Setup

NOTE: These pages are relevant to a Cremation, Burial or Scattering booking.

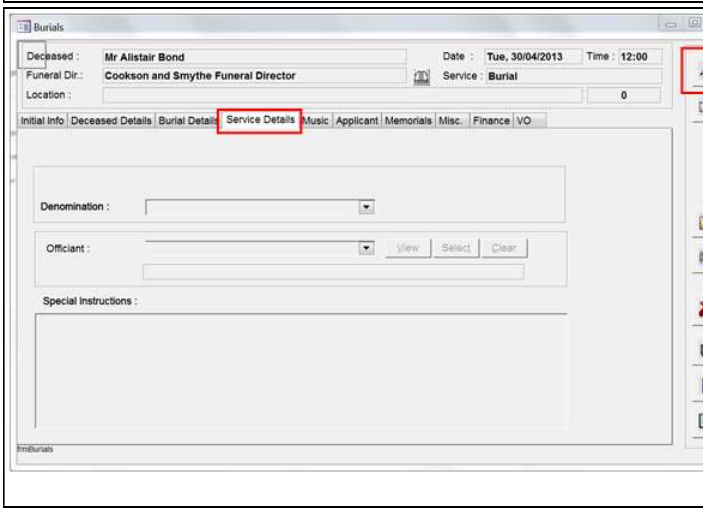
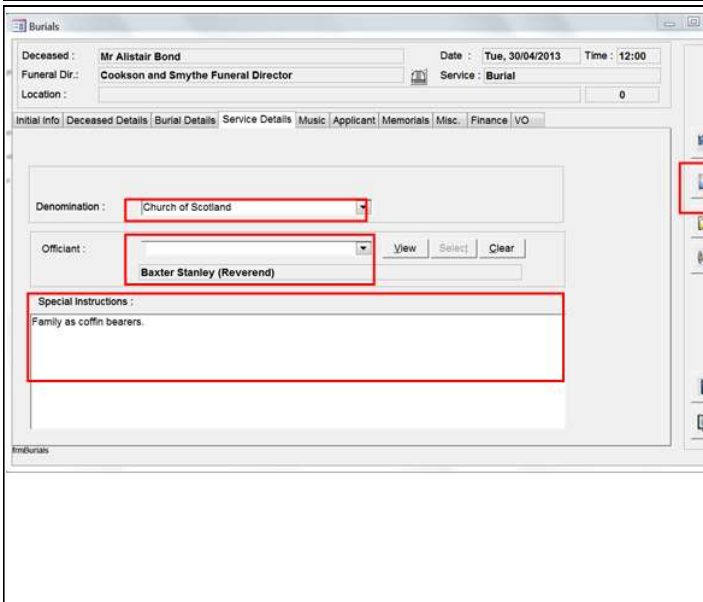
Select **Diary** from the Outlook bar on the left hand side. Select **Show Diary** from the expanded selection.

View: **Diary Page** Diary: **Rubican Cemetery** Date: **Tuesday 30/06**

Time	Title	Comments	Process	Agent
09:00				
09:30				
10:00	Hooper	Large Funeral	Completed	Tavistock And Williams Funeral ...
10:30	Donaldson	Music to be confirmed	Application Received	Tavistock And Williams Funeral ...
11:00				
11:30				
12:00	Bond	Web cast requested	Application Received	Cookson and Smythe Funeral DL...
12:30				
13:00				
13:30				
14:00				
14:30				
15:00				
15:30				
16:00				
16:30				

The *Appointment Diary* screen will be displayed
Select the correct *Diary* for the booking

Select the *Date* of the booking
All bookings for that diary page

	<p>for that date will be displayed Double click on the time of the booking in question</p>
	<p>The booking will open on the <i>Initial Info</i> tab</p> <p>NOTE: The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this.</p> <p>Click on the Service Details Tab Click on the Edit pencil</p>
	<p>Select the service <i>Denomination</i> from the drop-down list Select an <i>Officiant</i> from the drop-down list.</p> <p>NOTE: If the Officiant isn't frequently used and can't be found on the drop down list, you can search for the officiant within the booking or the officiant can be created from within the booking by clicking on the Select button</p> <p>Enter any <i>Special Instructions</i> for the service Click on Save</p>

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Enter Applicant Details For A Booking



NOTE: These pages are relevant to a Cremation, Burial or Scattering booking.

Select **Diary** from the Outlook bar on the left hand side.
Select **Show Diary** from the expanded selection.

View : Diary Page Diary : Rubican Cemetery Date : Tuesday 30/04

Time	Title	Comments	Process	Agent
09:00				
09:30				
10:00	Hooper	Large Funeral	Completed	Tavistock And Williams Funeral ...
10:30				
11:00	Donaldson	Music to be confirmed	Application Received	Tavistock And Williams Funeral ...
11:30				
12:00	Band	Web cast requested	Application Received	Cookson and Smythe Funeral DI...
12:30				
13:00				
13:30				
14:00				
14:30				
15:00				
15:30				
16:00				
16:30				

The *Appointment Diary* screen will be displayed
Select the correct *Diary* for the booking

Select the *Date* of the booking

All bookings for that diary page for that date will be displayed
Double click on the time of the booking in question

Burials

Deceased : Mr Alistair Bond Date : Tue, 30/04/2013 Time : 12:00

Funeral Dir.: Cookson and Smythe Funeral Director Service : Burial

Location : Rubican Cemetery - Section A - 31 0

Initial Info | Deceased Details | Burial Details | Service Details | Music | **Applicant** | Memorials | Misc. | Finance | VO

Title: [v]
Forenames: [v]
Surname: [v]
Maidenname: [v]
Other name: [v]
Address Line 1: [v]
Address Line 2: [v]
Address Line 3: [v]
Address Line 4: [v]
Address Line 5: [v]
Address Line 6: [v]
Post Code: [v]
Telephone : [v]
Mobile : [v]
Email : [v]

Relationship: [v]
Relationship Details: [v]
Occupation: [v]

3946

Grave Owner
Deceased Address
Select Applicant

The booking will open on the *Initial Info* tab

NOTE: The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this.

Click on the **Applicant** Tab
Click on the **Edit** pencil

Burials

Deceased : Mr Alistair Bond Date : Tue, 30/04/2013 Time : 12:00
 Funeral Dir.: Cookson and Smythe Funeral Director Service : Burial
 Location : Rubican Cemetery - Section A ~ 31 0

Initial Info | Deceased Details | Burial Details | Service Details | Music | Applicant | Memorials | Misc. | Finance | VO

Title:
 Forenames:
 Surname:
 Maidenname:
 Other name:
 Address Line 1:
 Address Line 2:
 Address Line 3:
 Address Line 4:
 Address Line 5:
 Address Line 6:
 Post Code:
 Telephone :
 Mobile :
 Email :

Relationship:
 Relationship Details:
 Occupation:

Grave Owner
 Deceased Address
 Select Applicant

If the booking is a burial and the applicant is the owner of the grave click on the **Grave Owner** Button. (If this is not the case skip the next step)

Burials

Deceased : Mr Alistair Bond Date : Tue, 30/04/2013 Time : 12:00
 Funeral Dir.: Cookson and Smythe Funeral Director Service : Burial
 Location : Rubican Cemetery - Section A ~ 31 0

Initial Info | Deceased Details | Burial Details | Service Details | Music | Applicant | Memorials | Misc. | Finance | VO

Title: Mrs
 Forenames: Frances
 Surname: Bond
 Maidenname:
 Other name:
 Address Line 1: 34 Murrells Walk
 Address Line 2: Hindhead
 Address Line 3: Surrey
 Address Line 4:
 Address Line 5:
 Address Line 6:
 Post Code: GU26 3QR
 Telephone : 01428 377373
 Mobile :
 Email : fbond@aol.com

Relationship:
 Relationship Details:
 Occupation:

Grave Owner
 Deceased Address
 Select Applicant

The name and address of the *grave owner* will be added as the *applicant* name and address.

Please move to the last step

Burials

Deceased : Mr Alistair Bond Date : Tue, 30/04/2013 Time : 12:00
 Funeral Dir.: Cookson and Smythe Funeral Director Service : Burial
 Location : Rubican Cemetery - Section A ~ 31 0

Initial Info | Deceased Details | Burial Details | Service Details | Music | Applicant | Memorials | Misc. | Finance | VO

Title:
 Forenames:
 Surname:
 Maidenname:
 Other name:
 Address Line 1:
 Address Line 2:
 Address Line 3:
 Address Line 4:
 Address Line 5:
 Address Line 6:
 Post Code:
 Telephone :
 Mobile :
 Email :

Relationship:
 Relationship Details:
 Occupation:

Grave Owner
Deceased Address
 Select Applicant

If the applicant lives at the same address as the deceased, click on **Deceased Address** (If this is not the case skip the next step)

The address of the deceased will be added as the applicant address

Enter the applicant's title, forenames and surname in the *title, forenames and surname* fields

Enter applicant's telephone number, mobile and email in the *telephone number, mobile and email* fields. Move to the last step

If the applicant already exists in BACAS in some role other than the grave owner click on **Select Applicant** button (if this is not the case please skip the next 2 steps)

The *Search for Clients* screen will open

Select the Role under which the applicant is already known to the system

Enter the *Forename* of the Applicant in the *Forename* field

Enter the *Surname* of the Applicant in the *Surname* field

Click on the **Search** button

The relevant information Screen will open:

If the search has returned the applicant click on the **Selection Finger**

The applicant details from the search will be added to the applicant screen. Now move to the next step

If the applicant is completely new to BACAS then type in the name, address and other contact details for the applicant.

Select the *Relationship* of the applicant to the deceased.



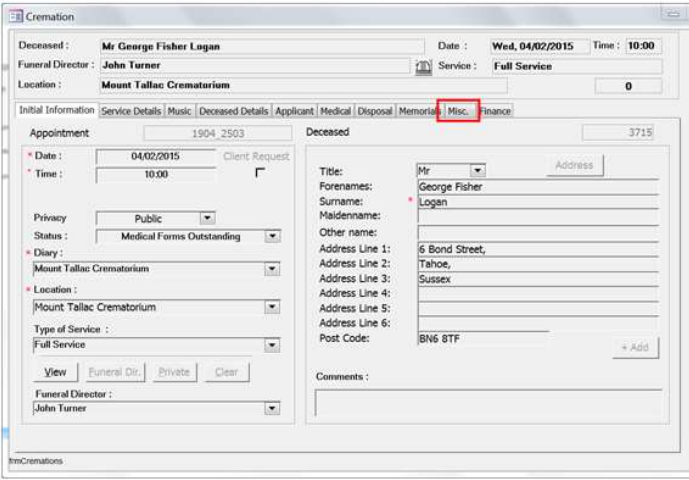
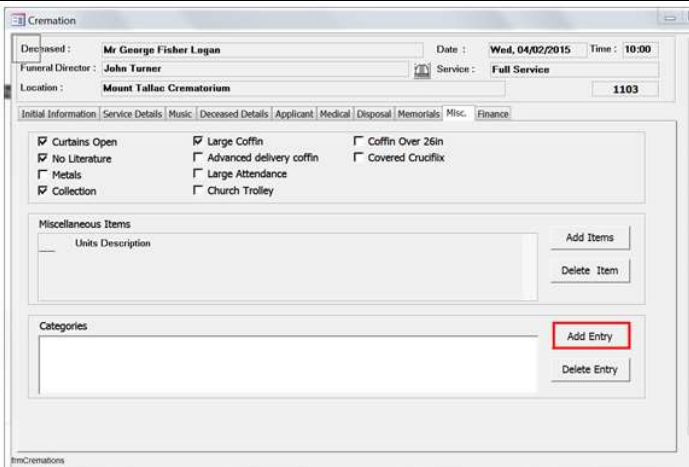
Enter further relationship details in the *Relationship Details* field.

Enter the occupation of the applicant in the *Occupation* field.

Click on the **Save** button

Record Miscellaneous Information for a booking

NOTE: These pages are applicable to a Cremation, Burial or Scattering booking. The *Category* section of the miscellaneous tab allows you to record extra information about the booking – for example if there is to be a collection at the

	service you can record the name of the Charity that the collection is for.
	<p>Select Diary from the Outlook bar on the left hand side.</p> <p>Select Show Diary from the expanded selection.</p>
	<p>The <i>Appointment Diary</i> screen will be displayed.</p> <p>Select the correct <i>Diary</i> for the booking</p> <p>Select the <i>Date</i> of the booking</p> <p>All bookings for that diary page for that date will be displayed</p> <p>Double click on the time of the booking in question</p>
	<p>The booking will open on the <i>Initial Info</i> tab</p> <p>NOTE: The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this.</p> <p>Click on the MiscTab</p> <p>Click on the Edit pencil</p>
	<p>The miscellaneous tab for the booking will be displayed.</p> <p>Click on the Add Entry in the <i>Category</i> section</p>

Category
Donations

Frequent Values
British Red Cross
East Grinstead Hospice
Friends of Tahoe Memorial Hospital
Help The Aged
Macmillan Cancer Support

East Grinstead Hospice

+ Add Cancel

frmAddCategory

The *Add Items* screen will open Selection Donations (or similar category) from the *Category* selection list

NOTE: If an appropriate category is not set up follow notes to [Set Up A Category](#) before proceeding

Select value required from *Frequent Values* selection to refresh the bottom field

NOTE: If an appropriate Frequent Value is not available you can simply type the value in the bottom field (follow notes to **xxxx** if you wish)

Click on the **Add** button

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

☒ Curtains Open ☒ Large Coffin ☐ Coffin Over 26in
☒ No Literature ☐ Advanced delivery coffin ☐ Covered Crucifix
☐ Metals ☐ Large Attendance
☒ Collection ☐ Church Trolley

Miscellaneous Items
Units Description

Add Items
Delete Item

Categories
Donations East Grinstead Hospice

Add Entry
Delete Entry

The details of the information will be recorded. (See green box)

Click on the **Save** button


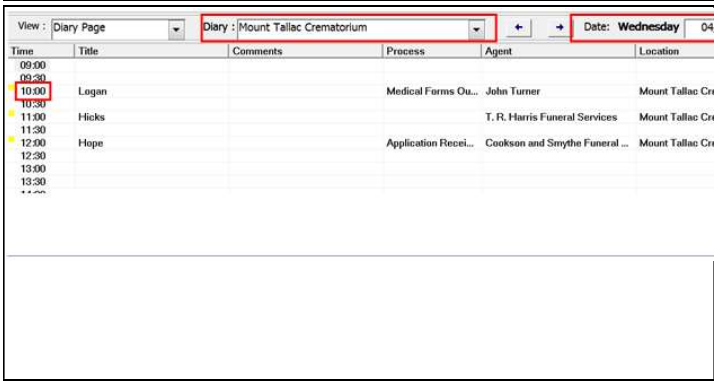
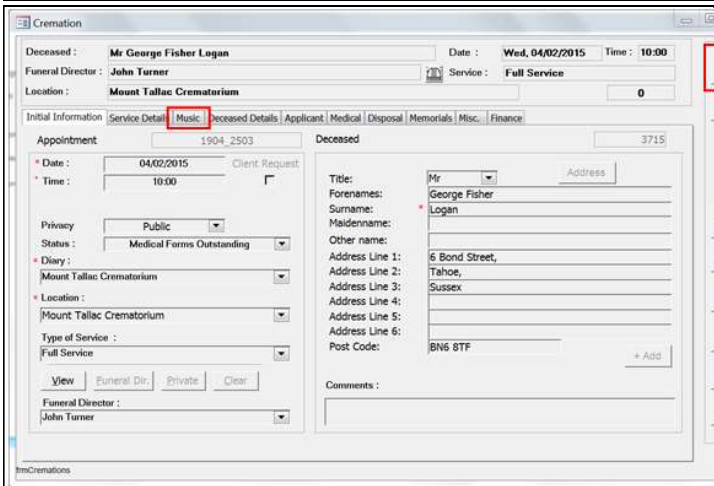
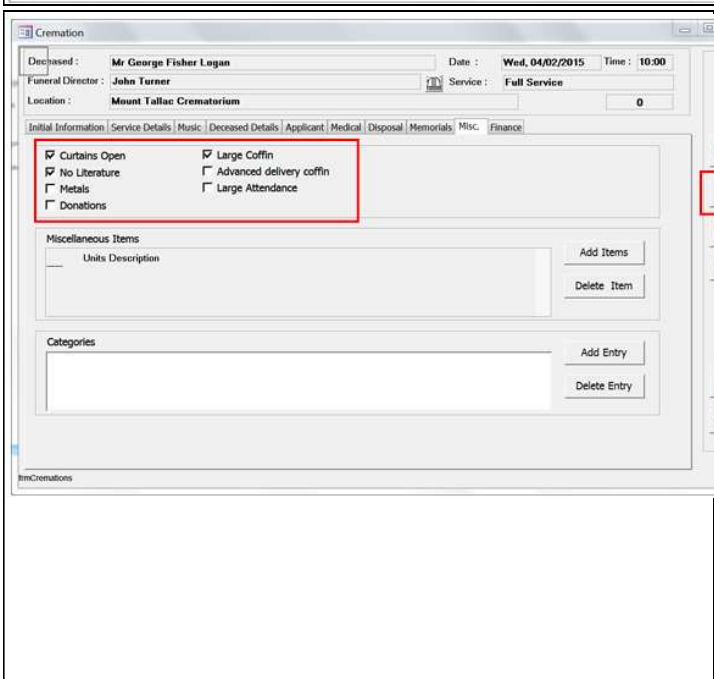
NOTE: If you wish this information to be displayed on the Chapel List; Attendant List; Operator Worksheet; Memorialisation Letters or any other reports please contact the CSS Help Desk: 08702 402 217

Check An Appointment Tick Box on a Booking

Appointment Tick Box	Description
----------------------	-------------

NOTE: These pages are applicable to a Cremation, Burial or Scattering booking.

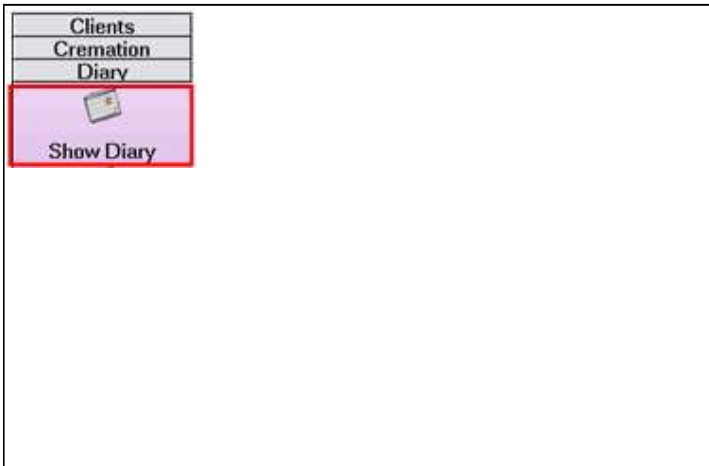
Appointment tick boxes are customisable and allow you to note additional circumstances. For example Curtains are to remain open; the applicant has said no to literature; Metals are to be returned to the family; a donation box is required; a large coffin is required or large attendance is expected.

	<ol style="list-style-type: none"> 1. Select Diary from the Outlook bar on the left hand side. 2. Select Show Diary from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Appointment Diary</i> screen will be displayed. 2. Select the correct <i>Diary</i> for the booking 3. Select the <i>Date</i> of the booking 4. All bookings for that diary page for that date will be displayed 5. Double click on the time of the booking in question
	<ol style="list-style-type: none"> 1. The booking will open on the <i>Initial Info</i> tab 2. NOTE: The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this. 3. Click on the MiscTab 4. Click on the Edit pencil
	<ol style="list-style-type: none"> 1. The miscellaneous screen settings for the booking will be displayed. 2. Check the tick boxes that are relevant to this booking 3. Click on the Save button 4. NOTE: If you can't find the tick box you require on this screen, follow these instructions to set up a new tick box: Set Up An Appointment Tick Box 5. Click on the Save button 6. Click on the Exit button to leave the booking and return to the diary page <p>NOTE: If you wish checking of the tick boxes to be reported on the Chapel List; Attendant List;</p>

Operator Worksheet;
Memorialisation Letters or any
other reports please contact the
CSS Help Desk: 08702 402 217

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Delete fees for a booking

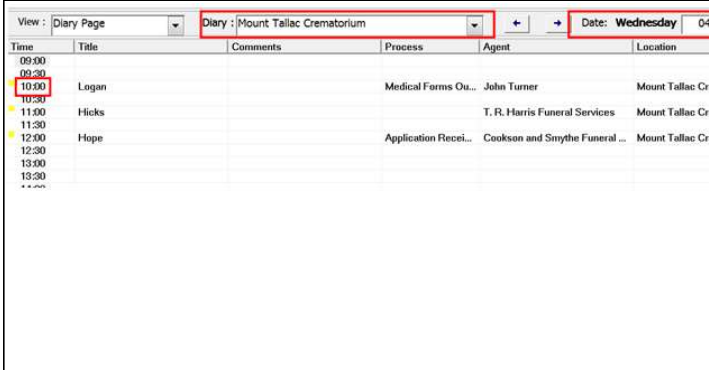


The screenshot shows the left-hand navigation menu with 'Clients', 'Cremation', and 'Diary' listed. The 'Diary' option is expanded, and 'Show Diary' is highlighted with a red box.

NOTE: These pages are applicable to a Cremation, Burial or Scattering booking. Follow these notes if you wish to add an item for invoicing when no charge has been set up for the item in BACAS.

Select **Diary** from the Outlook bar on the left hand side.

Select **Show Diary** from the expanded selection.



The screenshot shows the 'Appointment Diary' screen. At the top, 'View: Diary Page' and 'Diary: Mount Tallac Crematorium' are selected. The date is 'Wednesday 04/02/2015'. A table lists appointments with columns for Time, Title, Comments, Process, Agent, and Location. The appointment at 10:00 for 'Logan' is highlighted with a red box.

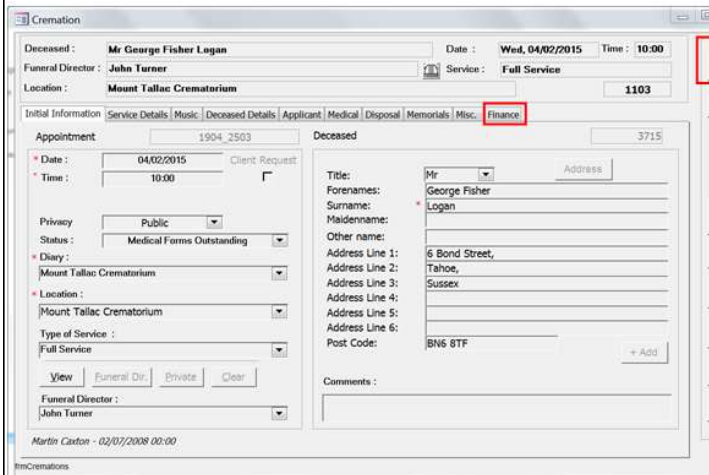
The *Appointment Diary* screen will be displayed.

Select the correct *Diary* for the booking

Select the *Date* of the booking

All bookings for that diary page for that date will be displayed

Double click on the time of the booking in question



The screenshot shows the 'Cremation' screen with the 'Initial Info' tab selected. The deceased is 'Mr George Fisher Logan'. The date is 'Wed, 04/02/2015' and the time is '10:00'. The location is 'Mount Tallac Crematorium'. The 'Finance' tab is highlighted with a red box.

The booking will open on the *Initial Info* tab

NOTE: The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this.

Click on the **Finance** Tab

Click on the **Edit** pencil

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Account To ☒ Funeral Director ☐ Applicant
John Turner of 245 High Street

Total Invoice: £450.00 Total Receipt:

Invoice	0	Cremation - 04/02/2015 (1103) Mr George Fisher 400	0
Invoice	0	Additional Audio Recording - 04/02/2015 (1103) 5	0
Invoice	0	Audio Recording CD - 04/02/2015 (1103) Mr Ge 45	0

Invoice

Add Item

Add Manual Item

Auto Generate Items

Print Invoice

Delete Invoice

Delete Item

Auto Generated Items

Receipt

Add Items

The Finance tab for the booking will be displayed, showing fees pending for the booking.

NOTE: Only fees that have not been issued as an Invoice – i.e. items that start with *Invoice 0* can be removed.

If the fees have been Auto generated and you wish to remove them all, click on the **Auto Generated Items** under the **Delete Invoice** heading

BACAS

Do you really want to delete the current record?

Yes No Cancel

A message will appear to ask if you really wish to remove the fee(s).

Click on **Yes**

Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Account To ☒ Funeral Director ☐ Applicant
John Turner of 245 High Street

Total Invoice: £450.00 Total Receipt:

Invoice	0	Cremation - 04/02/2015 (1103) Mr George Fisher 400	0
Invoice	0	Additional Audio Recording - 04/02/2015 (1103) 5	0
Invoice	0	Audio Recording CD - 04/02/2015 (1103) Mr Ge 45	0

Invoice

Add Item

Add Manual Item

Auto Generate Items

Print Invoice

Delete Invoice

Delete Item

Auto Generated Items

Receipt

Add Items

Otherwise:

Click on an item to select it.

Click on **Delete Item** under the Delete Invoice heading to remove it

BACAS

Do you really want to delete the current record?

Yes No Cancel

A message will appear to ask if you really wish to remove the fee(s).

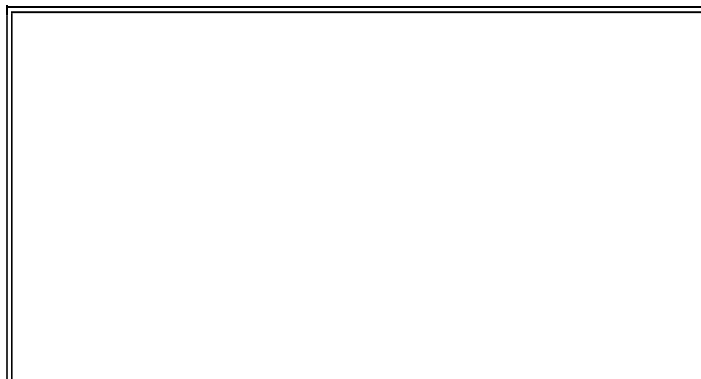
Click on **Yes**

Repeat the previous steps until all incorrect fees have been removed.
Click on the **Save** button

If you wish to add new fees follow one of: [Generate Fees from a booking](#); [Pick a fee for a booking](#), [Add a fee manually](#)

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Generate Fees From a booking



NOTE: These pages are applicable to a Cremation, Burial or Scattering booking. Follow these notes to generate fees for a booking on an individual basis. If you wish to generate fees for all bookings in a financial period follow: [Generate Fees for a Financial Period](#)



Select **Diary** from the Outlook bar on the left hand side.
Select **Show Diary** from the expanded selection.

View : Diary Page Diary : Mount Tallac Crematorium Date: Wednesday 04/02/2015

Time	Title	Comments	Process	Agent	Location
09:00					
09:30					
10:00	Logan		Medical Forms Ou...	John Turner	Mount Tallac Cre
10:30					
11:00	Hicks			T. R. Harris Funeral Services	Mount Tallac Cre
11:30					
12:00	Hope		Application Recei...	Cookson and Smythe Funeral ...	Mount Tallac Cre
12:30					
13:00					
13:30					

The *Appointment Diary* screen will be displayed.

Select the correct *Diary* for the booking
Select the *Date* of the booking
All bookings for that diary page for that date will be displayed
Double click on the time of the booking in question

The booking will open on the *Initial Info* tab

NOTE: The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this.

Click on the **Finance** Tab
Click on the **Edit** pencil

The Finance tab for the booking will be displayed.

Check the *Account To* setting. Tick the *Funeral Director* box if you wish to invoice the funeral director. Tick the *Applicant* box if you wish to invoice the applicant
Click on the **Auto Generate Items** button.

Invoice	0	Cremation - 04/02/2015 (1103) Mr George Fisher 400	0
Invoice	0	Additional Audio Recording - 04/02/2015 (1103) 5	0
Invoice	0	Audio Recording CD - 04/02/2015 (1103) Mr Ge-45	0

The correct finance items will auto generate. (If this is not the case please see the **NOTE** at end of this document). The total invoice amount will be displayed in *Total Invoice*, and the correct payee displayed underneath *Account To*.

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**

Funeral Director : **John Turner** Service : **Full Service**

Location : **Mount Tullao Crematorium** **1103**

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc | Finance

Account To: ☒ Funeral Director ☐ Applicant
John Turner of 245 High Street

Total Invoice: **£450.00** Total Receipt: **0**

Invoice	0	Cremation - 04/02/2015 (1103) Mr George Fisher 400	0
Invoice	0	Additional Audio Recording - 04/02/2015 (1103) 5	0
Invoice	0	Audio Recording CD - 04/02/2015 (1103) Mr Ge 45	0

Invoice

Add Item
Add Manual Item
Auto Generate Items
Print Invoice

Delete Invoice

Delete Item
Auto Generated Items

Receipt

Add Items

ItemCremations

Click on the **Save** button

Follow the link [Issue an Invoice from a booking](#) if you wish to process and print an invoice to the payee for this booking only.

If you wish to leave the fees to be invoiced at a later time, click on **Close Form** to be returned to the diary

NOTE:

Fees are auto generated in 2 ways:


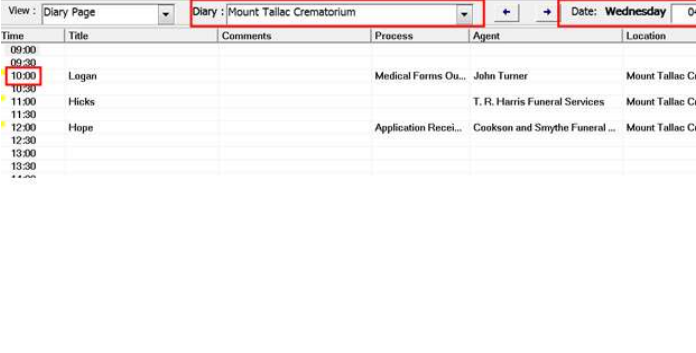
1. From the *Service Type* selected under Initial information. The fee(s) generated will normally take into account the age of the deceased and whether the deceased was resident. It may also take into account the time of the service, and in the case of a burial the type of grave, its location and the depth of burial.
2. From the miscellaneous items selected under the Misc tab,

If auto generated fees are incorrect or missing completely then it is worth checking that the correct *Service type* has been selected. Look at *Deceased Details* to check that the age of the deceased is correct; the resident flag is correctly set and the body part indicator is correctly set. Also check that the correct miscellaneous items have been selected under the *Misc* tab.

	<p>If you wish to delete fees that have been incorrectly generated follow: Delete Fees From a Booking then follow the steps above to regenerate the fees.</p> <p>It may be the case that your fees are not set up to automatically generate. If this is the case you might be able to Pick A Fee or you can always add a fee manually</p> <p>If you feel that your fees should be generating automatically and they are not; or they are still generating incorrectly after checking the Service Type, Age, Resident Flag and Body Part flag then please call the Help Desk (08702 402 217) for further assistance.</p>
--	---

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Pick a Fee for a Booking

	<p>NOTE: These pages are applicable to a Cremation, Burial or Scattering booking. Follow these notes to add an item for invoicing that is not auto generated.</p>
	<p>Select Diary from the Outlook bar on the left hand side. Select Show Diary from the expanded selection.</p>
	<p>The <i>Appointment Diary</i> screen will be displayed. Select the correct <i>Diary</i> for the booking Select the <i>Date</i> of the booking All bookings for that diary page for that date will be displayed Double click on the time of the booking in question</p>

The booking will open on the *Initial Info* tab

NOTE: The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this.

Click on the **Finance** Tab
Click on the **Edit** pencil

The Finance tab for the booking will be displayed.

Check the *Account To* setting. Tick the *Funeral Director* box if you wish to invoice the funeral director. Tick the *Applicant* box if you wish to invoice the applicant
Click on the **Add Item** button.

The *Select Miscellaneous Item* screen will open

Select the *Group* that holds the item that you wish to pick
Highlight the item in the *Items* list to select it.
Click on the selection **Finger**
Repeat these steps to pick any other items
Click on the **Close Form** button

Deceased: Mr George Fisher Logan Date: Wed, 04/02/2015 Time: 10:00
 Funeral Director: John Turner Service: Full Service
 Location: Mount Tallac Crematorium 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Account To: ☒ Funeral Director ☐ Applicant
 John Turner of 245 High Street

Total Invoice: £125.00 Total Receipt: 0
 Invoice 0 Additional Chapel Time - 04/02/2015 (1103) Mr 125 0

Invoice:
 Add Item
 Add Manual Item
 Auto Generate Items
 Print Invoice

Delete Invoice:
 Delete Item
 Auto Generated Items

Receipt:
 Add Items

You will be returned to the finance tab of the booking and the picked item will be displayed. The correct payee below *Account To* and the *Total Invoice* amount are displayed.

Click on the **Save** button

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Add a Fee Manually For A Booking

Clients
 Cremation
 Diary
 Show Diary

NOTE: These pages are applicable to a Cremation, Burial or Scattering booking. Follow these notes if you wish to add an item for invoicing when no charge has been set up for the item in BACAS.

Select **Diary** from the Outlook bar on the left hand side.

Select **Show Diary** from the expanded selection.

View: Diary Page Diary: Mount Tallac Crematorium Date: Wednesday 04

Time	Title	Comments	Process	Agent	Location
09:00					
10:00	Logan		Medical Forms Ou...	John Turner	Mount Tallac Cre
11:00	Hicks			T. R. Harris Funeral Services	Mount Tallac Cre
12:00	Hope		Application Recei...	Cookson and Smythe Funeral ...	Mount Tallac Cre
13:00					
13:30					

The *Appointment Diary* screen will be displayed.

Select the correct *Diary* for the booking

Select the *Date* of the booking

All bookings for that diary page for that date will be displayed

Double click on the time of the booking in question

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**

Funeral Director : **John Turner** Service : **Full Service**

Location : **Mount Tallac Crematorium** 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | **Finance**

Appointment : 1904_2503 Deceased : 3715

Date : 04/02/2015 Client Request

Time : 10:00

Privacy : Public

Status : Medical Forms Outstanding

Diary : Mount Tallac Crematorium

Location : Mount Tallac Crematorium

Type of Service : Full Service

View Funeral Dir. Private Clear

Funeral Director : John Turner

Martin Caxton - 02/07/2008 00:00

Deceased

Title : Mr Address

Forenames : George Fisher

Surname : Logan

Maidenname :

Other name :

Address Line 1 : 6 Bond Street,

Address Line 2 : Tahoe,

Address Line 3 : Sussex

Address Line 4 :

Address Line 5 :

Address Line 6 :

Post Code : BN6 8TF + Add

Comments :

The booking will open on the *Initial Info* tab

NOTE: The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this.

Click on the **Finance** Tab
Click on the **Edit** pencil

Cremation

Deceased : **Mr George Fisher Logan** Date : **Wed, 04/02/2015** Time : **10:00**

Funeral Director : **John Turner** Service : **Full Service**

Location : **Mount Tallac Crematorium** 1103

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | **Finance**

Account To : ☒ Funeral Director ☐ Applicant

Total Invoice: Total Receipt:

Invoice

Add Item

Add Manual Item

Auto Generate Items

Print Invoice

Delete Invoice

Delete Item

Auto Generated Items

Receipt

Add Items

The Finance tab for the booking will be displayed.

Check the *Account To* setting. Tick the *Funeral Director* box if you wish to invoice the funeral director. Tick the *Applicant* box if you wish to invoice the applicant
Click on the **Add Manual Item** button.

Select Miscellaneous Item

Funeral Director : **John Turner of 245 High Street** Select Other Payee

Payee : **John Turner of 245 High Street**

Organization : *Tahoe Bereavement Services

Currency : *Sterling

Account Code : C001

Description : *Mr George Fisher Logan (1103) Certified Extract

Location : *Mount Tallac Crematorium

Process Date : *17/06/2015

Amount : *35.00 Calc Gross Tax

VAT : Calc Net Tax

Reference : 1904

frmManualInvoice

A new screen will open:

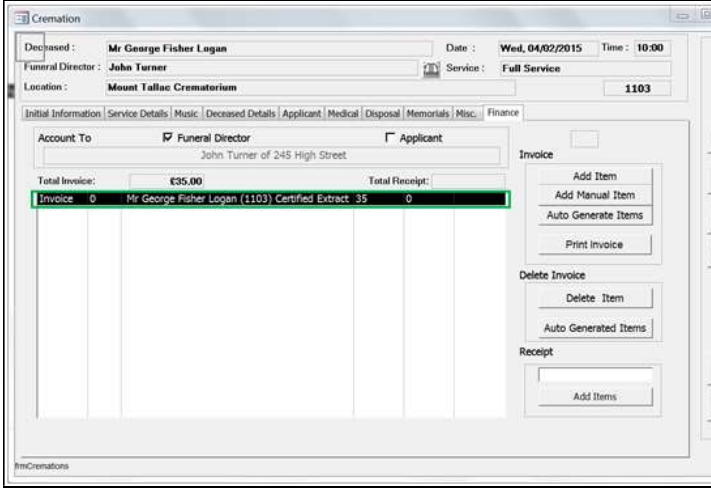
Check that the correct *Payee* is selected (If this is not the case click on *Select Other Payee*)

Select the appropriate *Account Code* for the item
Add details of the item to the end of the *Description* field (in this case Certified Extract)

Select the correct *Location*
The *Process Date* will show today's date. Change this to reflect the date of the booking

Enter an *Amount* for the item (with *VAT* if appropriate)
The Reference is generated by BACAS and is unique to this booking, but can be amended if wished.

Click on the **Save** button
Click on the **Close Form**

	<p>button.</p> <p>You will be returned to the booking and the added item will be displayed</p> <p>Repeat the previous 2 steps to add another item manually</p>
---	--


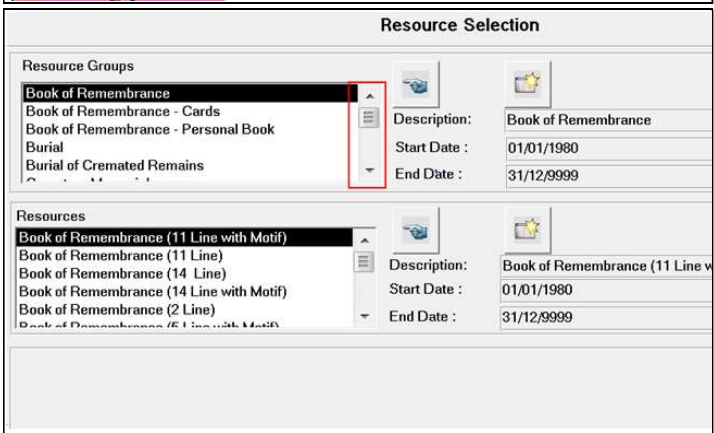
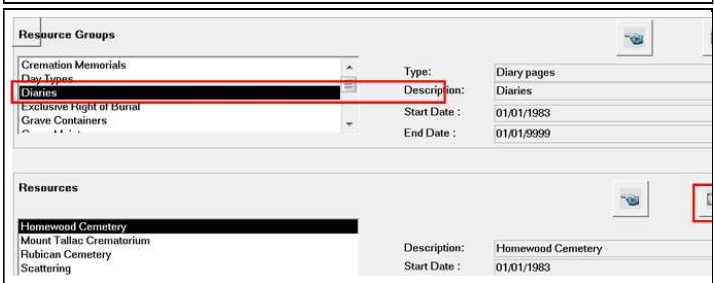
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Set up a Reception Diary or Staff Diary

	<p>NOTE: These notes are for a diary that is intended for administration only (for example a diary at reception, a staff diary or a grounds maintenance diary). You must only use special appointments for this type of diary so that they will not be allocated register numbers.</p>
--	--

	<ol style="list-style-type: none"> 1. Select SetUp from the <i>Outlook bar</i> on the left hand side. 2. Select Resources from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Resource Selection</i> screen will be displayed. This will list all existing resource groups. 2. Use the <i>Resource Group scroll bar</i> to search for the Resource group of type <i>Diary Pages</i>. This is likely to have the name "Diaries" or "Locations"
	<ol style="list-style-type: none"> 1. Click on the Diaries Resource Group to select it 2. Click on the New Resource Button

Edit Resource
 ID:
 Resource Group: Diaries
 Description: Reception
 Start Date: 01/01/1980 End Date: 31/12/9999
 Remote Publishing Type: Private
 Locations for this diary:
 Rubican Cemetery
 Mount Tallac Crematorium
 Homewood Cemetery
 Mont Tallac Cemetery
 Mount Tallac Crematorium
 Rubican Cemetery
 Sunnyside Cemetery
 Appointment Types for this diary:
 Burial
 Cremation
 Exhumation
 Disposal of remains from away
 Memorial
 frmResource

The *Edit Resource* Screen will open

1. Enter a *Description* for the new Diary
2. Select **Private** as the *Remote Publishing Type*
3. Click on **Save**

Edit Resource
 ID: 77
 Resource Group: Diaries
 Description: Reception
 Start Date: 01/01/1980 End Date: 31/12/9999
 Remote Publishing Type: Private
 Locations for this diary:
 Homewood Cemetery
 Mont Tallac Cemetery
 Mount Tallac Crematorium
 Rubican Cemetery
 Sunnyside Cemetery
 Appointment Types for this diary:
 Locked
 Burial
 Cremation
 Exhumation
 Disposal of remains from away
 Memorial
 frmResource

1. Click on the **Edit** pencil
2. Click on the Diary Location under *Diaries for this location*
3. Click on the *arrow to the left*

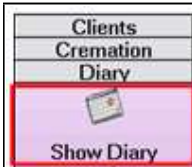
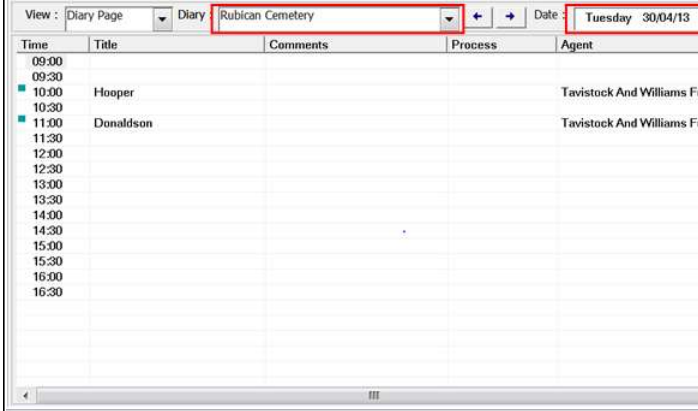
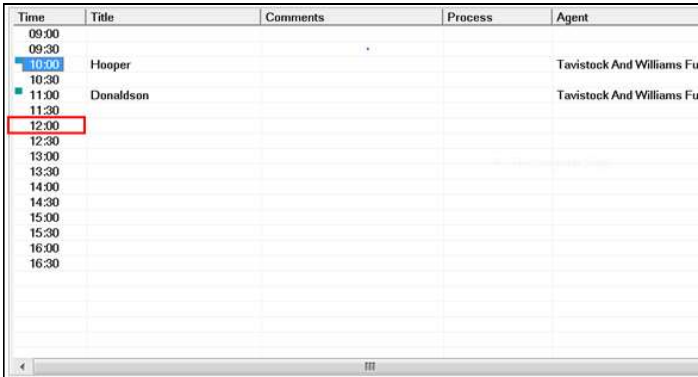
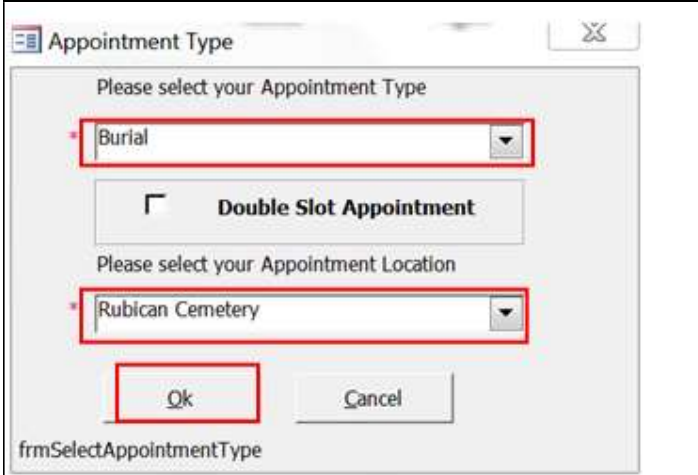
Edit Resource
 ID: 77
 Resource Group: Diaries
 Description: Reception
 Start Date: 01/01/1980 End Date: 31/12/9999
 Remote Publishing Type: Private
 Locations for this diary:
 Mount Tallac Crematorium
 Homewood Cemetery
 Mont Tallac Cemetery
 Mount Tallac Crematorium
 Rubican Cemetery
 Sunnyside Cemetery
 Appointment Types for this diary:
 Locked
 Exhumation
 Disposal of remains from away
 Memorial
 Special
 Locked
 frmResource

1. Click on *Special* appointment type under *Appointment Types for this diary*
2. Click on the *arrow to the left*
3. Click on the **Save** button
4. Click on the **Exit** button

You now need to set up this new diary in user settings for each user that wants to use it. Follow notes: [Add A New Diary For A User](#)

You will also need to set up diary times for this new diary. Follow Notes: [Set Up Diary Times For A New Diary](#)

Register a Booking From the Diary Page

	<p>Select Diary from the Outlook bar on the left hand side.</p> <p>Select Show Diary from the expanded selection.</p>
	<p>The <i>Appointment Diary</i> screen will be displayed.</p> <p>Select the <i>Diary</i> required</p> <p>Set the <i>Date</i> required</p> <p>Any existing bookings for that diary page for that date will be displayed</p>
	<p>Double click on the time of the booking you wish to create</p>
	<p>The <i>Appointment Type</i> window will open</p> <p>Select the appointment type using the drop-down arrow</p> <p>Select the location for the booking using the drop-down arrow</p> <p>Click on OK</p>

A Provisional Booking Record will open on the *Initial Info* tab

NOTE: The other tabs in the picture below may vary from what you can see on your screen depending on whether you are creating a cremation, burial or scattering – don't worry about this.

1. Select a *Status* from the drop down list (optional – this will be displayed from the diary)
2. Select a *Type of Service* from the drop-down list
3. Select a *Funeral Director* from the drop-down list.
4. **NOTE:** If the Funeral Director isn't frequently used and doesn't appear on the drop down list it is possible to search for the funeral director within the booking or set up the Funeral Director within the booking by clicking on the **Funeral Dir** button
5. Select the deceased *Title* from the drop-down list
6. Enter the *Forename* and *Surname* of the deceased
7. Enter *Maiden name* and *Other name* if appropriate
8. Enter the *Address* of the deceased
9. **NOTE:** if the last address for the deceased was a local institution such as a nursing home it may be quicker to click on the **Address** button and select the address from the *Frequently used addresses* list. If the institution does not appear on the *Frequently used addresses* list, then enter it manually and then click on **+Add** to add it to the list for use with future bookings.
10. Enter a *Postcode* for the deceased
11. Enter any *Comments* that you wish to be displayed from the diary page.
12. Click on the **Save** button

You are now ready to enter the registration details for the deceased:

Click on the **Deceased Details** tab

Click on the **Edit Pencil**

1. If the deceased lived in the parish/borough then tick the **Resident** flag.
2. Enter the **Date of Death**.
3. Enter the number of years/months/weeks/days/hours/minutes that the deceased lived in the **Age** field. Leave this empty if the deceased was stillborn or a foetus
4. Select years/months/weeks/days/hours/minutes/Stillborn/Non-viable Foetus from the drop-down list.
5. Select the **Gender** of the deceased
6. Select the **Marital Status** of the deceased
7. Select the **Occupation** of the deceased
8. Select the **Death Location** of the deceased from the drop list. If the death location isn't on the drop down list, it can be entered and if required added to the drop-down list for future bookings by clicking on **+Death Location**. Click on **At Home** if the deceased died at home.
9. Select the **District** where the death was registered. If the District isn't on the drop down list, it can be entered and if required added to the drop-down list for future bookings by clicking on **+District**.
10. Select the **Sub District** where the death was registered. If the Sub District isn't on the drop down list, it can be entered and if required added to the drop-down list for future bookings by clicking on **+ Sub District**.
11. Enter the **Date** the death was registered
12. Enter the registration number in the **Reference** field
13. Enter any **Comments** concerning the registration
14. Click on **Save**

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Diary Times




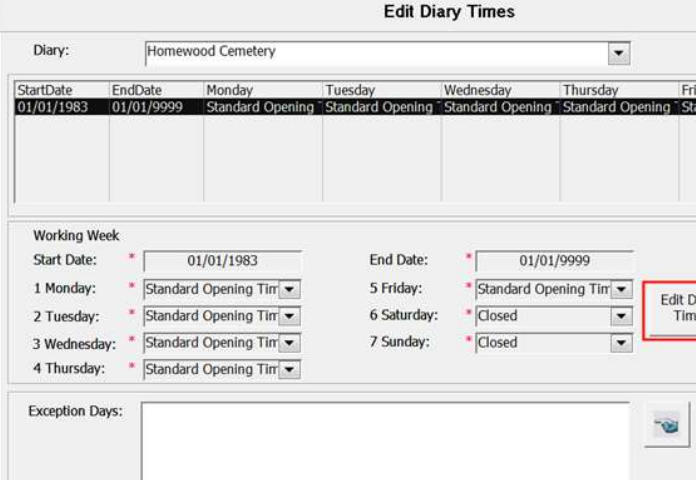
Diary Times

- [Edit a Day Type \(set of Diary Times\)](#)
- [Set up an Exeption Day](#)
- [Set up Diary Times for a New Diary](#)

- [Set up a New Day Type \(Set of Diary Times\)](#)
- [View Diary Times For A Working Week](#)
- [Set up new times for a working week](#)
- [View Existing Day Type \(Diary Times\)](#)

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Edit a Day Type (Set of Diary Times)

	<p>Edit A Day Type (Set Of Diary Times) IMPORTANT NOTE: If you edit a Day Type that is currently in use by any diary in BACAS then these new times will be reflected on past diary pages and current diary pages for each diary using this Day Type. (Times of existing bookings will remain unchanged) If in any doubt speak to a member of the Help Desk Team)</p>
 <p>The screenshot shows the Outlook bar on the left side of the application. It contains several icons and labels: 'Clients', 'Cremation', 'Diary', 'Show Diary', 'Diary Times' (highlighted with a red box), 'User Settings', and 'Diary Colours'.</p>	<ol style="list-style-type: none"> 1. Select Diary from the <i>Outlook bar</i> on the left hand side. 2. Select Diary Times from the expanded selection
 <p>The screenshot shows the 'Edit Diary Times' screen. At the top, there is a dropdown menu for 'Diary:' with 'Homewood Cemetery' selected. Below this is a table with columns for 'StartDate', 'EndDate', and days of the week (Monday through Friday). The table contains data for 'Standard Opening' times. Below the table, there is a 'Working Week' section with 'Start Date' and 'End Date' fields, and a list of days (Monday through Sunday) with corresponding time slots. The 'Edit Diary Times' button is highlighted with a red box.</p>	<ol style="list-style-type: none"> 1. The <i>Diary calendar Setup</i> screen will be displayed 2. Click on the Edit Diary Times button on the right hand side of the screen.

Edit Diary Times

Day Types: Closed

Description: * Closed

Start Date: * 01/01/1983 End Date: * 01/01/9999

Times:

Time: Publishing: + add - remove

Public

frmDayTypes

1. The *Edit Diary Times* screen will open
2. Click on the drop-down arrow adjacent to Day Types to view the sets of diary times already set up in BACAS.

Edit Diary Times

Day Types: Standard Opening Times

Description: * Standard Opening Times

Start Date: * 01/01/1983 End Date: * 01/01/9999

Times:

09:00
09:30
10:00
10:30
11:00
11:30
12:00
12:30
13:00
13:30
14:00
14:30
15:00
15:30

Time: Publishing: + add - remove

Public

frmDayTypes

1. Select the *Day Type* entry from the list to view the existing times for this day type
2. Click on the **Edit** pencil.

Edit Diary Times

Day Types: Standard Opening Times

Description: * Standard Opening Times

Start Date: * 01/01/1983 End Date: * 01/01/9999

Times:

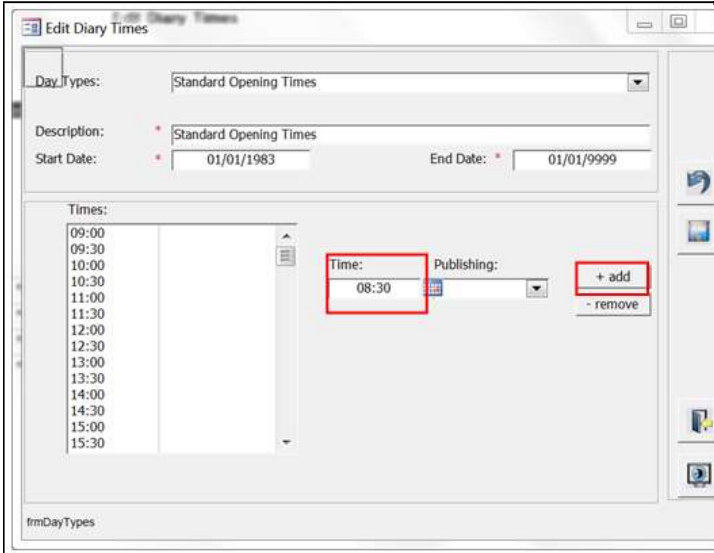
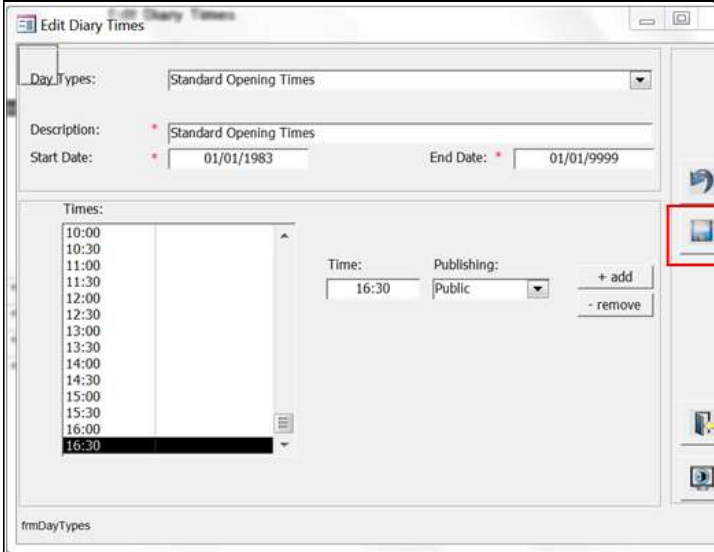

10:00
10:30
11:00
11:30
12:00
12:30
13:00
13:30
14:00
14:30
15:00
15:30
16:00
16:30

Time: Publishing: + add - remove

16:30

frmDayTypes


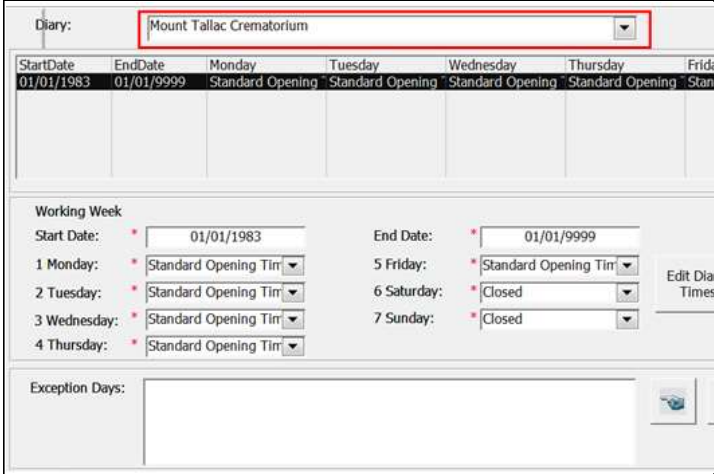
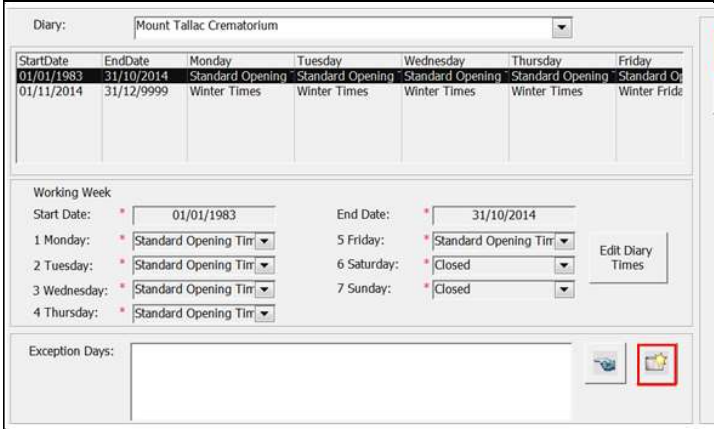
1. To remove a time:
2. Highlight the time on the left hand side
3. Click on the **remove** button
4. The time will be removed from the set of times.

	<ol style="list-style-type: none">1. To add to the set of existing times:2. Enter a time on the right hand side3. Click on the add button
	<ol style="list-style-type: none">1. The time will be added to the set of times.2. Click on the Save button3. Click on the Close Form button  <p>You are now ready to Set up a Working Week using this day type</p>

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Set up an Exception Day

	<p>Set Up an Exception Day.</p> <p>NOTE: You can set up an exception day (eg Christmas Day, Bank Holidays) to override the normal diary times for that day.</p>
--	--

	<ol style="list-style-type: none"> 1. Select Diary from the Outlook bar on the left hand side. 2. Select Diary Times from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Diary calendar Setup</i> screen will be displayed: 2. Select the correct diary from the drop-down selection list adjacent for Diary at the top of the screen.
	<ol style="list-style-type: none"> 1. Click on the Edit pencil. 2. Click on the New button in the bottom right hand corner of the screen.

frmExceptionDays

1. The *Edit Diary Exception Dates* screen will open:
2. Select the correct *Day Type* (Diary times) for the exception day.
3. Set the date for the exception day.
4. Click on the **Save** button.
5. Click on the drop down arrows to select a a day type for each day of the week.
6. Click on the **Save** button

StartDate	EndDate	Monday	Tuesday	Wednesday	Thursday	Friday
01/01/1983	31/10/2014	Standard Opening	Standard Opening	Standard Opening	Standard Opening	Standard Opening
01/11/2014	31/12/9999	Winter Times	Winter Times	Winter Times	Winter Times	Winter Times

Working Week

Start Date: * 01/01/1983 End Date: * 31/10/2014

1 Monday: * Standard Opening Time 5 Friday: * Standard Opening Time

2 Tuesday: * Standard Opening Time 6 Saturday: * Closed

3 Wednesday: * Standard Opening Time 7 Sunday: * Closed

4 Thursday: * Standard Opening Time

Exception Days: 26/05/2014 Closed

You will be returned to the *Diary Calendar Setup*
The new exception day will be displayed at the bottom of the screen

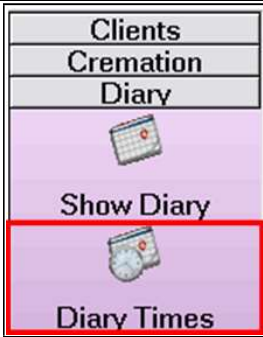
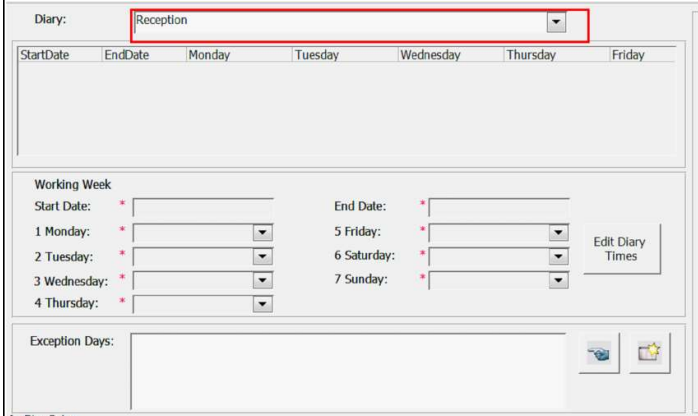
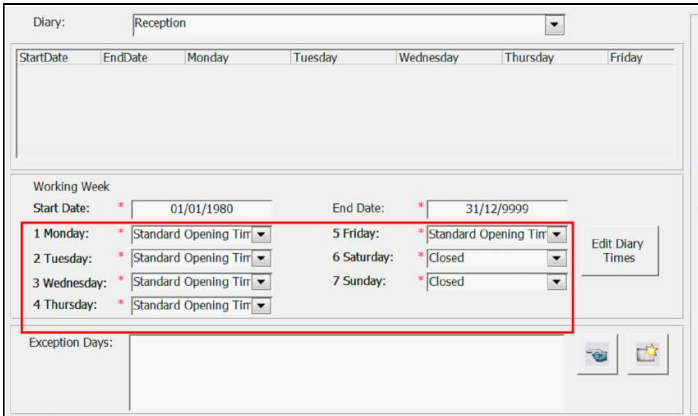
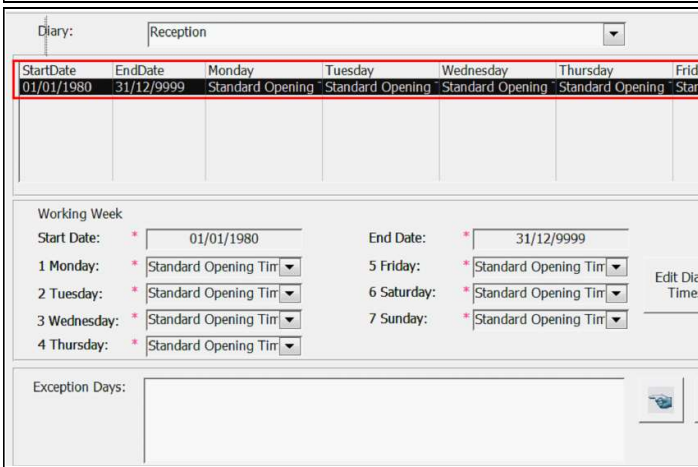
Check the diary pages to see that the new times are displayed.

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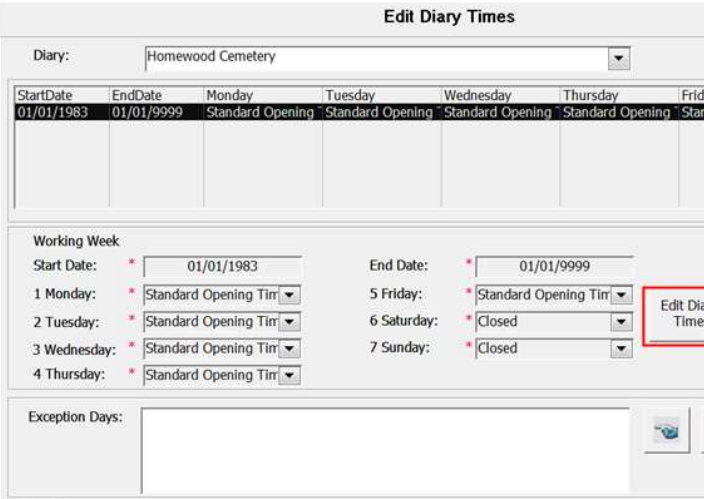
Set Up Diary Times For A new Diary

Set Up Diary Times For A new Diary

NOTE: Before you start you will need to know which set of diary times you are going to use for the new Diary. Follow this link to look at the sets of diary times available: [View Day Types](#)

	<ol style="list-style-type: none"> 1. Select Diary from the Outlook bar on the left hand side. 2. Select Diary Times from the expanded selection.
	<p>The <i>Diary calendar Setup</i> screen will be displayed.</p> <ol style="list-style-type: none"> 1. Select the correct diary from the drop-down selection list adjacent for Diary at the top of the screen. 1. Click on the New button
	<ol style="list-style-type: none"> 1. Click on the drop down arrows to select a Day Type for each day of the week. 2. Click on the Save button
	<p>Diary times for the new diary are now set up: Check the diary pages to see that the new times are displayed.</p>

Set up a New Day Type (Set of Diary Times)

	<p>Set Up New Day Type NOTE: These notes will show you how to create a set of diary times for a working day. For example you might want to change from a standard day to a shorter day suitable for winter or a longer day suitable for summer. Once created, they can be put to use by setting up a Working Week.</p>
 <p>The screenshot shows the Outlook bar with the following options: Clients, Cremation, Diary, Show Diary, Diary Times (highlighted with a red box), User Settings, and Diary Colours.</p>	<ol style="list-style-type: none"> 1. Select Diary from the <i>Outlook bar</i> on the left hand side. 2. Select Diary Times from the expanded selection
 <p>The screenshot shows the 'Edit Diary Times' screen. At the top, it says 'Diary: Homewood Cemetery'. Below this is a table with columns: StartDate, EndDate, Monday, Tuesday, Wednesday, Thursday, Friday. The first row shows dates 01/01/1983 to 01/01/9999 and 'Standard Opening' for all days. Below the table is a 'Working Week' section with 'Start Date' (01/01/1983) and 'End Date' (01/01/9999). It lists days 1 through 7 with their respective times: 1 Monday: Standard Opening Tim, 2 Tuesday: Standard Opening Tim, 3 Wednesday: Standard Opening Tim, 4 Thursday: Standard Opening Tim, 5 Friday: Standard Opening Tim, 6 Saturday: Closed, 7 Sunday: Closed. An 'Edit Dia Times' button is highlighted with a red box. At the bottom is an 'Exception Days' section.</p>	<ol style="list-style-type: none"> 1. The <i>Diary calendar Setup</i> screen will be displayed 2. Click on the Edit Diary Times button on the right hand side of the screen.

1. The *Edit Diary Times* screen will open
1. Click on the **New** button

1. Type in a *Description* for the new *Day Type*
2. Enter the first *Time* for the day in the box on the right hand side of the screen
3. Select the *Publishing Type*
4. Click on the **add** button

1. The first time for the *Day Type* will appear on the left hand side of the screen
2. Type in the second time on the Right hand side of the screen
3. Click on the **add** button

	<ol style="list-style-type: none"> 1. The second time for the <i>Day Type</i> will appear on the left hand side of the screen 2. Repeat the previous 2 steps until all the times for the day have been added 3. Click on Save
	<p>Click on the Close Form button You are now ready to set up a <i>Working Week</i> using this day type. Follow this link for instructions how to do this: Set Up A Working Week</p>

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View Diary Times For A Working Week

	<p>NOTE: The working week defines which set of diary times will be used for each day of the week.</p>
	<p>Select Diary from the Outlook bar on the left hand side.</p> <p>Select Diary Times from the expanded selection.</p>

Diary: Mount Tallac Crematorium						
Start Date	End Date	Monday	Tuesday	Wednesday	Thursday	Friday
01/01/1983	01/01/9999	Standard Opening	Standard Opening	Standard Opening	Standard Opening	Standard Opening
<div>Working Week</div> <div>Start Date: * 01/01/1983 End Date: * 01/01/9999</div> <div> <div>1 Monday: * Standard Opening Tim</div> <div>2 Tuesday: * Standard Opening Tim</div> <div>3 Wednesday: * Standard Opening Tim</div> <div>4 Thursday: * Standard Opening Tim</div> <div>5 Friday: * Standard Opening Tim</div> <div>6 Saturday: * Closed</div> <div>7 Sunday: * Closed</div> </div> <div>Exception Days:</div>						

The *Diary calendar Setup* screen will be displayed.

Select the correct diary from the drop-down selection list adjacent for Diary at the top of the screen.

The Diary Times for each day of the week will be displayed. (Inside green box)

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Set up new times for a working week

<div> <div>Clients</div> <div>Cremation</div> <div>Diary</div> <div>Show Diary</div> <div style="border: 2px solid red;">Diary Times</div> </div>		<p>NOTE: The working week defines which set of diary times will be used for each day of the week. If you edit a working week that is currently in use, the new diary times you chose will be displayed for all past, current and future diary pages. For this reason it is advisable to set an end date for the current working week record, and create a new working week record to start the day you wish these to come into effect. Before you start you will need to know which set of diary times you are going to use for the new working week. Follow this link to look at the sets of diary times available: View Day Types</p>
		<ol style="list-style-type: none"> 1. Select Diary from the Outlook bar on the left hand side. 2. Select Diary Times from the expanded selection.

Diary: Mount Tallac Crematorium

StartDate	EndDate	Monday	Tuesday	Wednesday	Thursday	Friday
01/01/1983	01/01/9999	Standard Opening	Standard Opening	Standard Opening	Standard Opening	Standard Opening

Working Week

Start Date: 01/01/1983 End Date: 01/01/9999

1 Monday: Standard Opening Tim 5 Friday: Standard Opening Tim

2 Tuesday: Standard Opening Tim 6 Saturday: Closed

3 Wednesday: Standard Opening Tim 7 Sunday: Closed

4 Thursday: Standard Opening Tim

Exception Days:

Diary: Mount Tallac Crematorium

StartDate	EndDate	Monday	Tuesday	Wednesday	Thursday	Friday
01/01/1983	01/01/9999	Standard Opening	Standard Opening	Standard Opening	Standard Opening	Standard Opening

Working Week

Start Date: 01/01/1983 End Date: 31/10/2014

1 Monday: Standard Opening Tim 5 Friday: Standard Opening Tim

2 Tuesday: Standard Opening Tim 6 Saturday: Closed

3 Wednesday: Standard Opening Tim 7 Sunday: Closed

4 Thursday: Standard Opening Tim

Exception Days:

The *Diary calendar Setup* screen will be displayed.

1. Select the correct diary from the drop-down selection list adjacent for Diary at the top of the screen. Click on the **Edit** pencil
2. Highlight the current working week for this diary (the record with an end date of 01/01/9999 or 31/12/9999)
3. Amend the *End Date* to the day before the date you wish the new working week and new diary times to come into effect
4. Click on **Save**

Diary: Mount Tallac Crematorium

StartDate	EndDate	Monday	Tuesday	Wednesday	Thursday	Friday
01/01/1983	31/10/2014	Standard Opening	Standard Opening	Standard Opening	Standard Opening	Standard Opening

Working Week

Start Date: 01/01/1983 End Date: 31/10/2014

1 Monday: Standard Opening Tim 5 Friday: Standard Opening Tim

2 Tuesday: Standard Opening Tim 6 Saturday: Closed

3 Wednesday: Standard Opening Tim 7 Sunday: Closed

4 Thursday: Standard Opening Tim

Exception Days:

Diary: Mount Tallac Crematorium

StartDate	EndDate	Monday	Tuesday	Wednesday	Thursday	Friday
01/01/1983	31/10/2014	Standard Opening	Standard Opening	Standard Opening	Standard Opening	Standard Opening

Working Week

Start Date: 01/11/2014 End Date: 31/12/9999

1 Monday: Winter Times 5 Friday: Winter Friday Times

2 Tuesday: Winter Times 6 Saturday: Closed

3 Wednesday: Winter Times 7 Sunday: Closed

4 Thursday: Winter Times

Exception Days:

1. Click on the **New** button
2. Enter a *Start Date* for the day you wish the new working week and diary times to come into effect. (This should be the day after the old working week finishes)
3. Click on the drop down arrows to select a a day type for each day of the week.
4. Click on the **Save** button



Diary: Mount Tallac Crematorium						
StartDate	EndDate	Monday	Tuesday	Wednesday	Thursday	Friday
01/01/1983	31/10/2014	Standard Opening	Standard Opening	Standard Opening	Standard Opening	Standard Opening
01/11/2014	31/12/9999	Winter Times	Winter Times	Winter Times	Winter Times	Winter Times
Working Week						

The new working week is now set up:

Check the diary pages to see that the new times are displayed.


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View Existing Day Type (Diary Times)

Clients
Cremation
Diary

Show Diary

Diary Times

NOTE: These notes will show you how to view sets of diary times already set up in BACAS. Diary times are put into use by adding them to a *Working Week*.

1. Select **Diary** from the Outlook bar on the left hand side.
2. Select **Diary Times** from the expanded selection.

Edit Diary Times						
Diary: Homewood Cemetery						
StartDate	EndDate	Monday	Tuesday	Wednesday	Thursday	Friday
01/01/1983	01/01/9999	Standard Opening	Standard Opening	Standard Opening	Standard Opening	Standard Opening
Working Week						
Start Date:	*	01/01/1983	End Date:	*	01/01/9999	
1 Monday:	*	Standard Opening Time	5 Friday:	*	Standard Opening Time	
2 Tuesday:	*	Standard Opening Time	6 Saturday:	*	Closed	
3 Wednesday:	*	Standard Opening Time	7 Sunday:	*	Closed	
4 Thursday:	*	Standard Opening Time				
Exception Days:						

The *Diary calendar Setup* screen will be displayed.

Click on the **Edit Diary Times** button on the right hand side of the screen.

The *Edit Diary Times* screen will open

1. Click on the drop-down arrow adjacent to Day Types to view the sets of diary times already set up in BACAS.

1. Select an entry from the list to view the times for this day type
1. Repeat the previous step until you have viewed all the sets of diary times set up in BACAS

If you identify a set of diary times that you wish to use then these can be put to use by setting up a new *Working Week*. Follow these instructions: either [Setup A New Working Week](#) or [Set Up Diary Times For A New Diary](#)

If you cannot see a set of diary times that you wish to use then you will need to set up a new set of Diary times. Follow these instructions: [Setup A New Day Type](#).

2. Click on the **Close Form** button

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User Settings

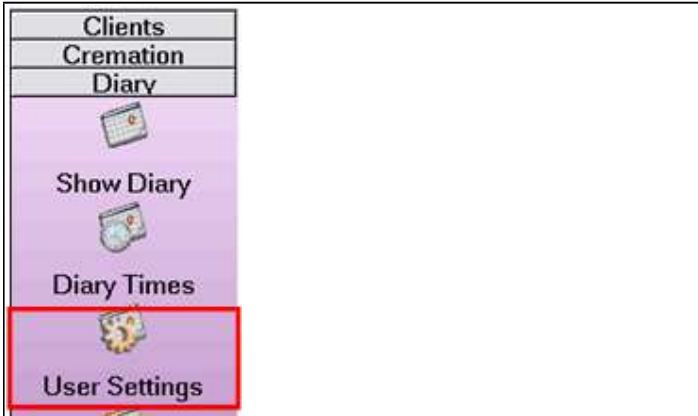
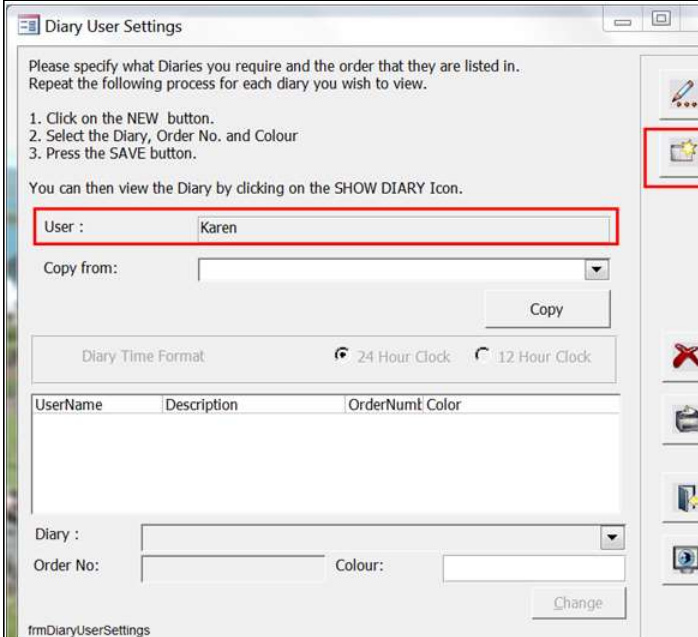


User Settings

- [Add a New User](#)
- [Add a new Diary for a User](#)

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Add a New User

 <p>The screenshot shows the Outlook bar with the following items: Clients, Cremation, Diary, Show Diary, Diary Times, and User Settings. The 'User Settings' item, which has a gear icon, is highlighted with a red rectangular box.</p>	<p>NOTE: The new user must be logged in on the PC in question</p> <p>Select Diary from the Outlook bar on the left hand side.</p> <p>Select User Settings from the expanded selection.</p> <p>The <i>Diary User Settings</i> screen will be displayed.</p>
 <p>The screenshot shows the 'Diary User Settings' window. It contains instructions and a list of diaries. The 'User' field in the 'User :' label is highlighted with a red rectangular box. The text 'Karen' is visible in the field. Other fields include 'Copy from:', 'Diary Time Format' (with radio buttons for 24 Hour Clock and 12 Hour Clock), and a table with columns 'UserName', 'Description', 'OrderNum', and 'Color'. At the bottom, there are fields for 'Diary:', 'Order No:', and 'Colour:' with a 'Change' button.</p>	<p>Check that the user's name is correct</p> <p>Click on the New button</p>

Diary User Settings

Please specify what Diaries you require and the order that they are listed in.
Repeat the following process for each diary you wish to view.

1. Click on the **NEW** button.
2. Select the Diary, Order No. and Colour
3. Press the **SAVE** button.

You can then view the Diary by clicking on the **SHOW DIARY** Icon.

User :

Copy from:

Diary Time Format ☒ 24 Hour Clock ☐ 12 Hour Clock

UserName	Description	OrderNum	Color

Diary :

Order No: Colour:

frmDiaryUserSettings

Select the main diary from the drop-down selection list at the bottom of the screen
Type in **1** in the *Order No* field
Click on **Save**

Diary User Settings

Please specify what Diaries you require and the order that they are listed in.
Repeat the following process for each diary you wish to view.

1. Click on the **NEW** button.
2. Select the Diary, Order No. and Colour
3. Press the **SAVE** button.

You can then view the Diary by clicking on the **SHOW DIARY** Icon.

User :

Copy from:

Diary Time Format ☒ 24 Hour Clock ☐ 12 Hour Clock

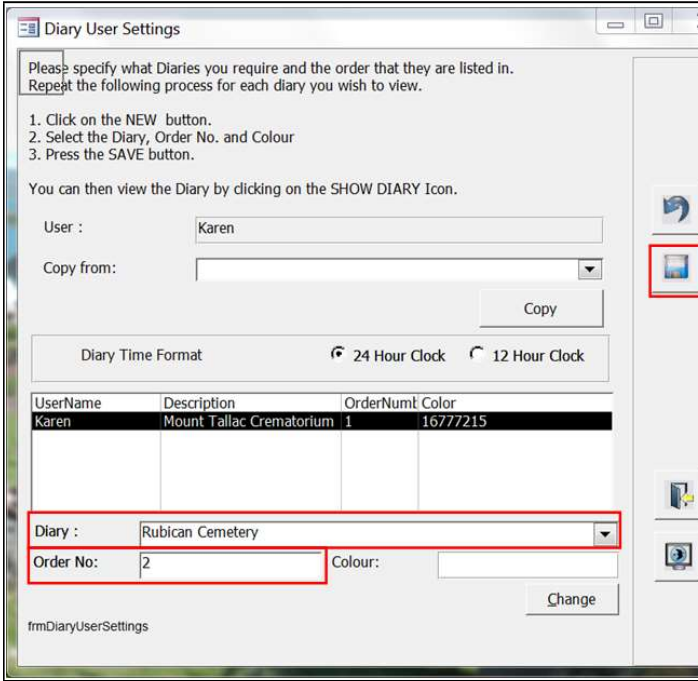
UserName	Description	OrderNum	Color
Karen	Mount Tallac Crematorium	1	16777215

Diary :

Order No: Colour:

frmDiaryUserSettings

To add another diary for this user click on the **New** button



Select the second diary from the drop-down selection list at the bottom of the screen
Type in **2** in the *Order No* field
Click on **Save**
Continue in this way to add any other diaries that the user needs access to

Click on the **Close Form** button

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Add a new Diary for a User

1. Select **Diary** from the Outlook bar on the left hand side.
2. Select **User Settings** from the expanded selection.

The *Diary User Settings* screen will be displayed.

Diary User Settings

Please specify what Diaries you require and the order that they are listed in. Repeat the following process for each diary you wish to view.

1. Click on the NEW button.
2. Select the Diary, Order No. and Colour
3. Press the SAVE button.

You can then view the Diary by clicking on the SHOW DIARY Icon.

User : Karen

Copy from: Window Snip Copy

Diary Time Format ☒ 24 Hour Clock ☐ 12 Hour Clock

UserName	Description	OrderNum	Color
Karen	Rubican Cemetery	2	16777215
Karen	Mount Tallac Crematorium	1	16777215

Diary : Rubican Cemetery

Order No: 2 Colour: Change

frmDiaryUserSettings

1. Make a note of the **highest** order number on the list of diaries in the centre part of the screen
2. Click on the **New** button
3. Select the new diary from the drop-down selection list at the bottom of the screen
4. Add 1 to the highest order number noted in step 3 and type the result in to the *Order No* field

Diary User Settings

Please specify what Diaries you require and the order that they are listed in. Repeat the following process for each diary you wish to view.

1. Click on the NEW button.
2. Select the Diary, Order No. and Colour
3. Press the SAVE button.

You can then view the Diary by clicking on the SHOW DIARY Icon.

User : Karen

Copy from: Copy

Diary Time Format ☒ 24 Hour Clock ☐ 12 Hour Clock

UserName	Description	OrderNum	Color
Karen	Rubican Cemetery	2	16777215
Karen	Mount Tallac Crematorium	1	16777215

Diary : Homewood Cemetery

Order No: 3 Colour: Change

frmDiaryUserSettings

1. Click on **Save**
2. Click on the **Close Form** button

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Diary Colours

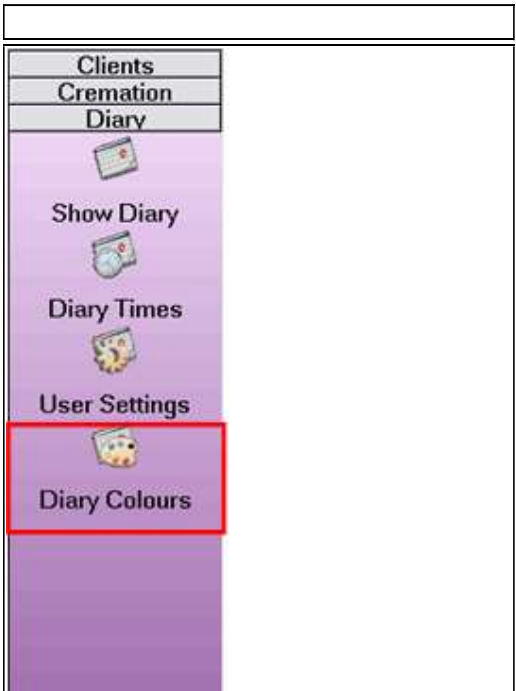
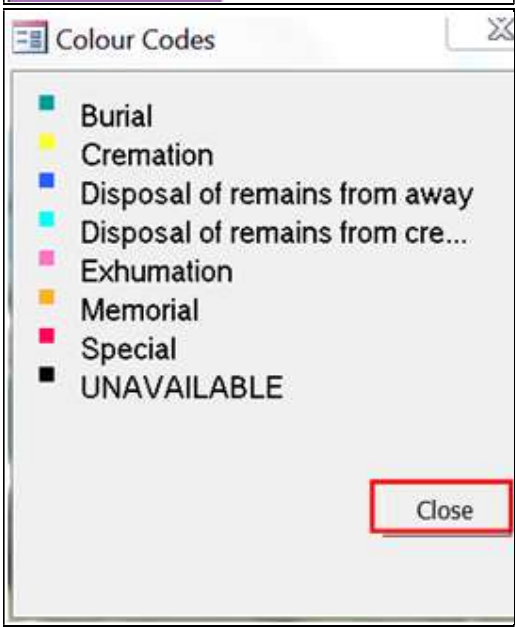


Diary Colours

- [View Booking Colour Codes](#)

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View Booking Colour Codes


	<p>View Diary colours</p> <ol style="list-style-type: none"> 1. Select Diary from the <i>Outlook bar</i> on the left hand side. 2. Select Diary Colours from the expanded selection.
	<p>The <i>Colour Codes</i> panel will be displayed</p> <ol style="list-style-type: none"> 1. Click on the Close button to exit

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Finance


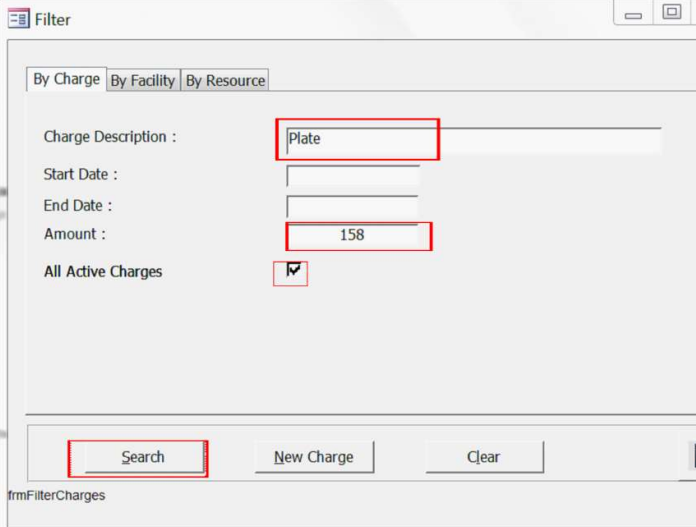
Finance	Finance
---------	---------

 Charges	Charges <ul style="list-style-type: none"> • Search for an existing charge • Assign an Account Code to a Charge • Setup a Memorial Charge • Setup a Miscellaneous Charge • Set up a Service Charge for automatic fee generation (Non-resident) • Setup a Service Charge for automatic fee generation (Resident) • Link in a new service type to an existing service charge • Set up a Medical Referee Payment Charge • Set up an Organist Pay Charge
 Generate Fees	Generate Fees <ul style="list-style-type: none"> • Generate Fees for a Period
 Invoices	Invoices <ul style="list-style-type: none"> • Make an Invoice Entry that is not related to a Booking, Memorial or Grave • Search for an unprocessed invoice (Summary id 0) • Correct an Invoice Entry On An unprocessed Invoice (Summary id 0) From a Booking • Correct An Invoice Entry on an unprocessed invoice (Summary id 0) from the Finance Menu • Delete an unprocessed Invoice (Summary id 0) • Process (number) and Print All Invoices for a period • Process (number) and print a single Invoice • Search for an invoice that has been issued • Receipt an Invoice • Part receipt an invoice • Clear an Invoice • Reinstate an invoice • Search for Outstanding (Unpaid) Invoices • Search For cleared (Paid) Invoices • Reprint a single Invoice
 Quick Update	Quick Update <ul style="list-style-type: none"> • Set up changes to charges
 Receipts	Receipts <ul style="list-style-type: none"> • Create a manual receipt • Search for a receipt • Update a receipt • Void a receipt • Reprint a receipt

 Charges	Charges <ul style="list-style-type: none"> • Search for an existing charge • Assign an Account Code to a Charge • Setup a Memorial Charge • Setup a Miscellaneous Charge • Set up a Service Charge for automatic fee generation (Non-resident) • Setup a Service Charge for automatic fee generation (Resident) • Link in a new service type to an existing service charge • Set up a Medical Referee Payment Charge • Set up an Organist Pay Charge
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Assign an Account Code to a Charge

	<ol style="list-style-type: none"> 1. Select Finance from the <i>Outlook bar</i> on the left hand side. 2. Select Charges from the expanded selection. .
	<ol style="list-style-type: none"> 1. The <i>Filter</i> screen will be displayed 2. You will need to search for the charge 3. If you know part or all of the charge description enter this in the <i>charge description</i> field 4. And/or if you know the amount of the charge enter this in the <i>Amount</i> field 5. Always tick the <i>All Active Charges</i> box 6. Click on the Search button

Charge	Start	End	Net	Gross	Resident
Conifer Single Plate	01/07/2011	31/12/9999	131.67	158	False
Seat Double Plate	01/07/2011	31/12/9999	131.67	158	False
Tree Single Plate	01/07/2011	31/12/9999	131.67	158	False

Links

Facility (automatic)	Resource (manual)
	Tree (Single Bronze 6" x 4" Plate with spike)

1. From the search results click on the charge you wish to amend
2. Click on the **Finger**

Edit Charge

Retain Information

Basic Details Optional Details **Codes**

Description : * Tree Single Plate

Company : * Tahoe Funeral Services

Currency : * Sterling

Start Date : * 01/07/2011 End Date : * 31/12/9999

Resident : ☐ Body Part : ☐

Rates

	Net Amount	1st Tax Rate	2nd Tax Rate
Initial Rate	131.67	26.33	0
Renewal Rate 1	0	0	0
Renewal Rate 2	0	0	0

frmCharge

1. Click on the Edit **Pencil**
2. Click on the **Codes** tab

Edit Charge

Retain Information

Basic Details Optional Details **Codes**

Account Code : 20831 8565

Report Code :


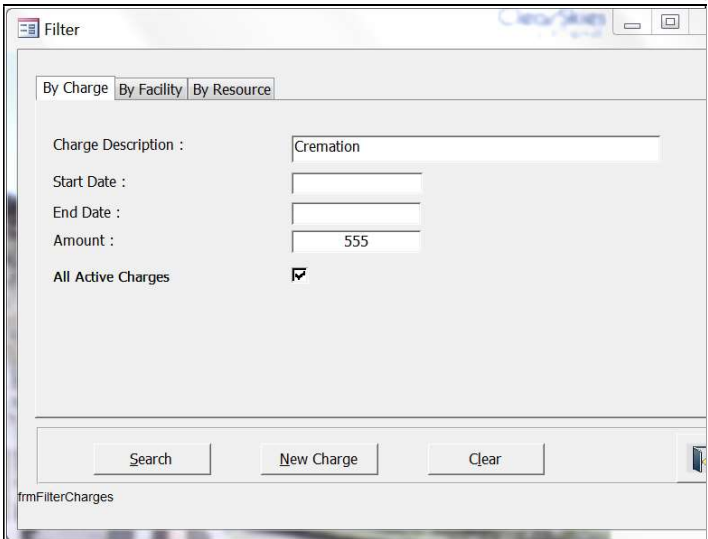
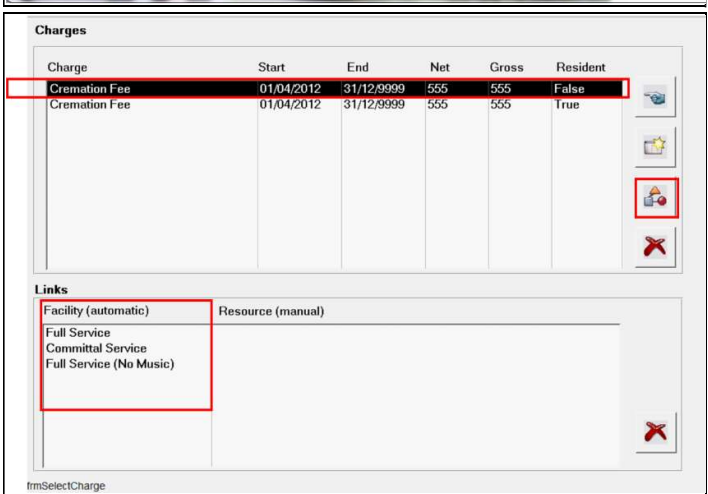
Rates

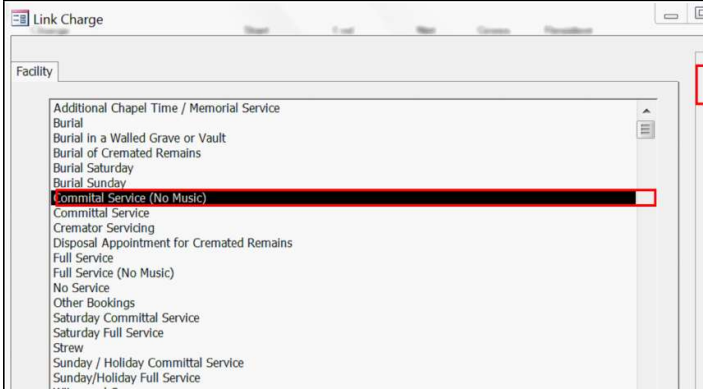
	Net Amount	1st Tax Rate	2nd Tax Rate	
Initial Rate	131.67	26.33	0	Calc Gross Tax
Renewal Rate 1	0	0	0	Calc Net Tax
Renewal Rate 2	0	0	0	

frmCharge

1. Select the correct code from the selection list
2. Click on **Save**
3. Click on the **Close** button

Link in a new service type to an existing service charge

	<ol style="list-style-type: none"> 1. Select Finance from the <i>Outlook bar</i> on the left hand side. 2. Select Charges from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Filter</i> screen will be displayed. 2. If you know part or all of the charge description enter this in the <i>charge description</i> field 3. And/or if you know the amount of the charge enter this in the <i>Amount</i> field 4. Always tick the <i>All Active Charges</i> box 5. Click on the Search button
	<p>A list of charges fulfilling the search criteria will be displayed.</p> <ol style="list-style-type: none"> 1. Click on the required charge to select it. 2. Look at the bottom part of the screen you will see the service types (<i>Facilities Automatic</i>) already linked into this charge 3. Click on the Link Charges button to add the the new service type



The *Link Charge* window will be displayed

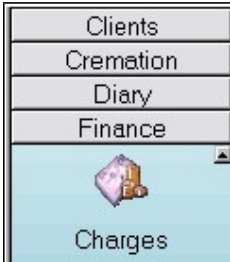
1. Use the top *Scroll bar* to search for the new Service type
2. Click on the **Finger**
3. Click on the **Close** button

The *Link Charge* window will be displayed

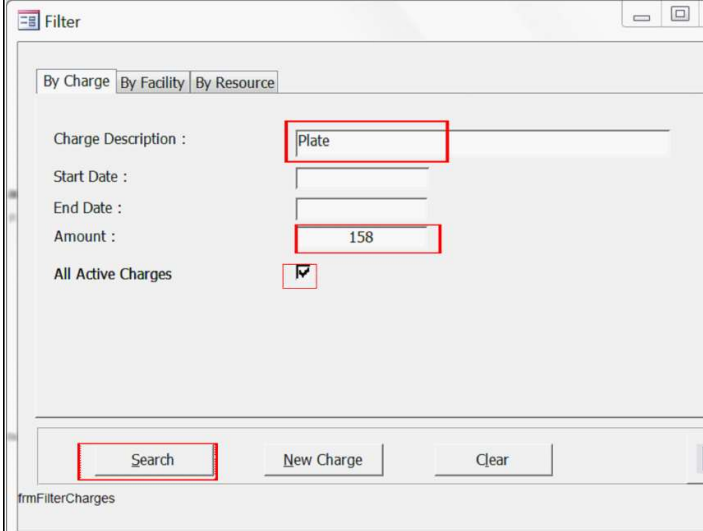
1. Use the top *Scroll bar* to search for the new Service type
2. Click on the **Finger**
3. Click on the **Close** button

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Search for a Charge



1. Select **Finance** from the *Outlook bar* on the left hand side.
2. Select **Charges** from the expanded selection.



1. The *Filter* screen will be displayed.
2. If you know part or all of the charge description enter this in the *charge description* field
3. And/or if you know the amount of the charge enter this in the *Amount* field
4. Always tick the *All Active Charges* box
5. Click on the **Search** button

Charge	Start	End	Net	Gross	Resident
Conifer Single Plate	01/07/2011	31/12/9999	131.67	158	False
Seat Double Plate	01/07/2011	31/12/9999	131.67	158	False
Tree Single Plate	01/07/2011	31/12/9999	131.67	158	False


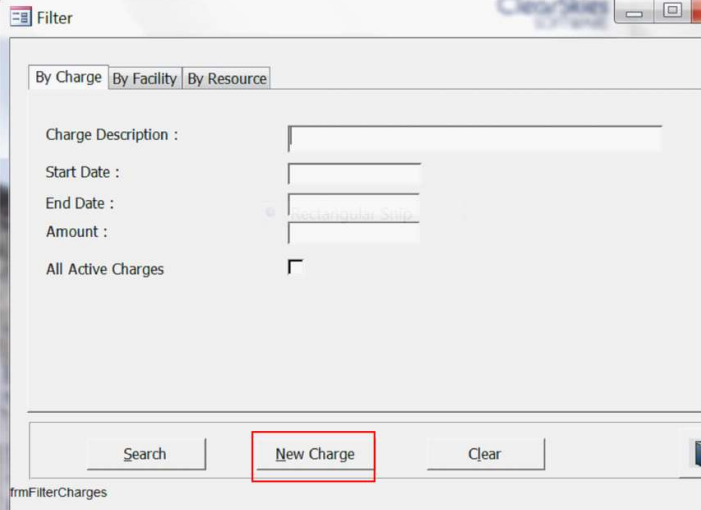
Links

Facility (automatic)	Resource (manual)
	Tree (Single Bronze 6" x 4" Plate with spike)

1. Click on the **Finger**

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Set up a Medical Referee Payment Charge

	<p>NOTE: The Medical Referee Payment charge will enable you to produce a report that summarises how much payment is due to each of your medical referees over a given period.</p>
	<ol style="list-style-type: none"> 1. Select Finance from the <i>Outlook bar</i> on the left hand side. 2. Select Charges from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Filter</i> screen will be displayed. 2. Click on the New Charge button

frmCharge

The *Edit Charge* window will be displayed.

1. Enter Medical Referee payment as the *Charge Description*
2. Enter the *Start Date* (The date from when you will start using Medical Referee Summary Report.
3. Enter how much you pay your medical referee in *Initial Rate* under net amount
4. Click on the **Save** button

frmCharge

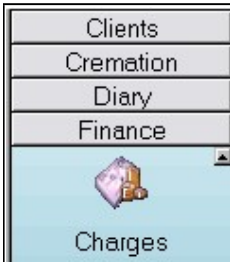
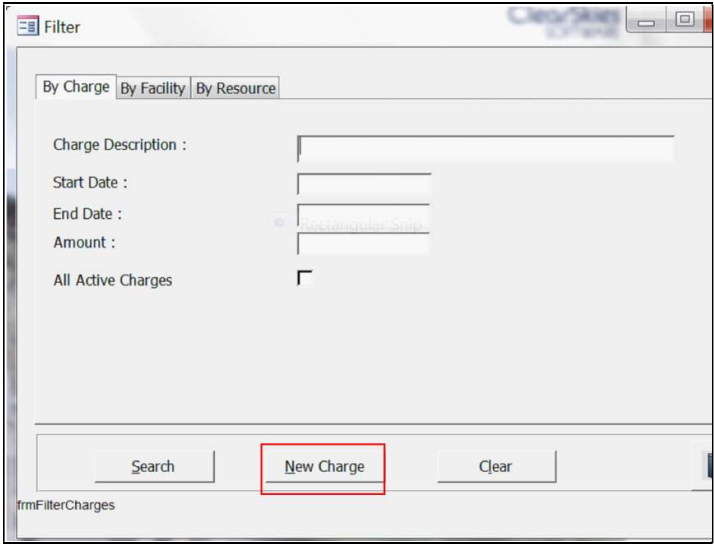
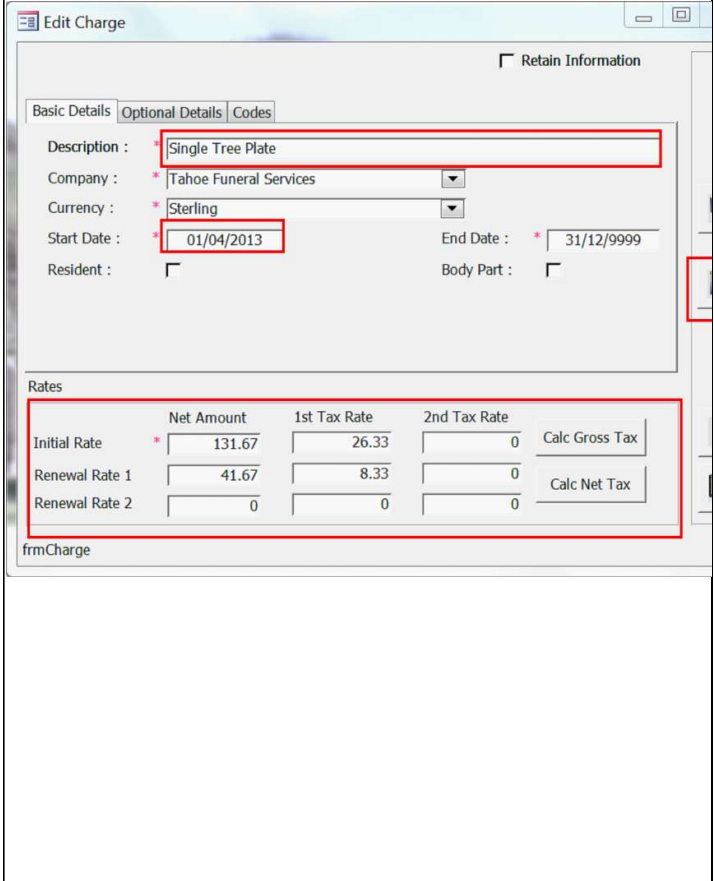
1. Click on the **Link Charges** button

frmLinkCharge

The *Link Charge* window will be displayed

1. Click on the **Resource** tab
2. Use the top *Scroll bar* to search for the Medical Referee Payment resource group
3. Click on the Medical Referee Payment resource group to select it
4. Click on the Medical Referee Payment in the lower box to select it.
5. Click on the **Finger**
6. Click on the **Close** button
7. The Medical Referee Payment charge is now set up. For guidance on how to assign an account code to this charge follow this link [Assign An Account Code To A Charge](#)

Set up a Memorial Charge

	<ol style="list-style-type: none"> 1. Select Finance from the <i>Outlook bar</i> on the left hand side. 2. Select Charges from the expanded selection. 																				
	<ol style="list-style-type: none"> 1. The <i>Filter</i> screen will be displayed. 2. Click on the New Charge button 																				
 <p>Edit Charge</p> <p>Retain Information</p> <p>Basic Details Optional Details Codes</p> <p>Description : * Single Tree Plate</p> <p>Company : * Tahoe Funeral Services</p> <p>Currency : * Sterling</p> <p>Start Date : * 01/04/2013 End Date : * 31/12/9999</p> <p>Resident : <input type="checkbox"/> Body Part : <input type="checkbox"/></p> <p>Rates</p> <table border="1"> <thead> <tr> <th></th> <th>Net Amount</th> <th>1st Tax Rate</th> <th>2nd Tax Rate</th> <th></th> </tr> </thead> <tbody> <tr> <td>Initial Rate</td> <td>* 131.67</td> <td>26.33</td> <td>0</td> <td>Calc Gross Tax</td> </tr> <tr> <td>Renewal Rate 1</td> <td>41.67</td> <td>8.33</td> <td>0</td> <td>Calc Net Tax</td> </tr> <tr> <td>Renewal Rate 2</td> <td>0</td> <td>0</td> <td>0</td> <td></td> </tr> </tbody> </table>		Net Amount	1st Tax Rate	2nd Tax Rate		Initial Rate	* 131.67	26.33	0	Calc Gross Tax	Renewal Rate 1	41.67	8.33	0	Calc Net Tax	Renewal Rate 2	0	0	0		<p>The <i>Edit Charge</i> window will be displayed.</p> <ol style="list-style-type: none"> 1. Enter the <i>Charge Description</i> (This description will appear on the invoice or receipt) 2. Enter the <i>Start Date</i> (The date from when you will start using this type of memorial on BACASNG) 3. Enter cost of the memorial on <i>Initial Rate</i> row. If the memorial is renewable then enter renewal fee on <i>Renewal Rate 1</i>. Use one of the following methods: <ol style="list-style-type: none"> a. If the memorial does not carry a VAT charge - enter full cost (and full renewal amount if applicable) under <i>Net</i>
	Net Amount	1st Tax Rate	2nd Tax Rate																		
Initial Rate	* 131.67	26.33	0	Calc Gross Tax																	
Renewal Rate 1	41.67	8.33	0	Calc Net Tax																	
Renewal Rate 2	0	0	0																		

Amount.

or

- b. For VAT split of total cost – enter full cost ((and full renewal amount if applicable) under *Net Amount* and click **Calc Net Tax** Button.

or

- c. Enter net cost (and net renewal amount if applicable) under *Net Amount* and click on **Calc Gross Tax** to calculate VAT on this amount.

4. Click on the **Save** button

Edit Charge

Retain Information

Basic Details Optional Details Codes

Description : * Single Tree Plate

Company : * Tahoe Funeral Services

Currency : * Sterling

Start Date : * 01/04/2013 End Date : * 31/12/9999

Resident : ☐ Body Part : ☐

Rates

	Net Amount	1st Tax Rate	2nd Tax Rate
Initial Rate	* 131.67	26.33	0
Renewal Rate 1	41.67	8.33	0
Renewal Rate 2	0	0	0

frmCharge

Click on the **Link Charges** button

Link Charge

Facility Resource


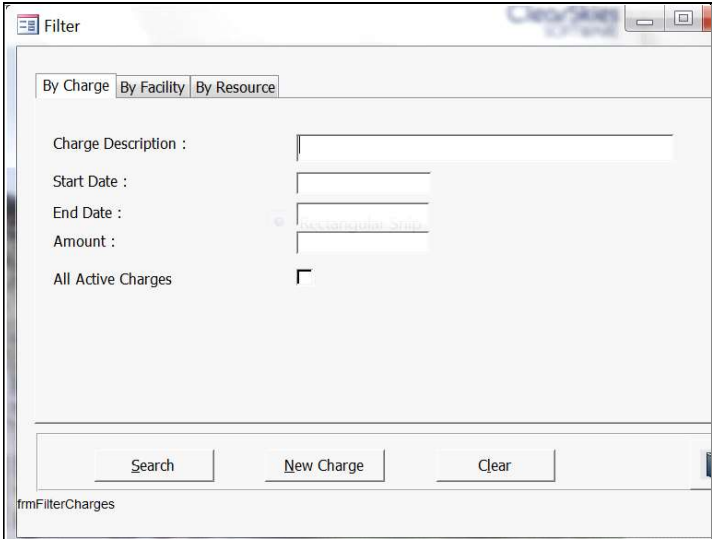
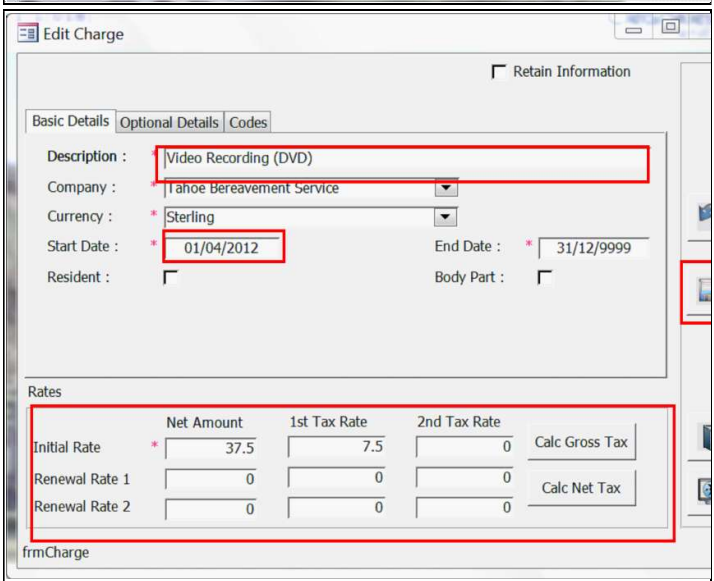
EROB
General Remembrance / Memorial
Kerb
Medical Referee Payment
Miscellaneous Cremation Fees
Obsolete
Seat
Shrub, Tree and Conifer Plates
Shrubs, Trees and Conifers
Conifer (Double Bronze 6" x 5" Plate with spike)
Conifer (Single Bronze 6" x 4" Plate with spike)
Conifer Additional (Double Bronze 6" x 5" Plate with spike)
Conifer Additional (Single Bronze 6" x 4" Plate with spike)
Shrub (Double Aluminium 5" x 4" Plate with spike)
Shrub (Single Aluminium 5" x 3" Plate with spike)
Shrub Additional (Double Aluminium 5" x 4" Plate with spike)
Shrub Additional (Single Aluminium 5" x 3" Plate with spike)
Temporary Marker
Tree (Double Bronze 6" x 5" Plate with spike)
Tree (Single Bronze 6" x 4" Plate with spike)
Tree Additional (Double Bronze 6" x 5" Plate with spike)
Tree Additional (Single Bronze 6" x 4" Plate with spike)

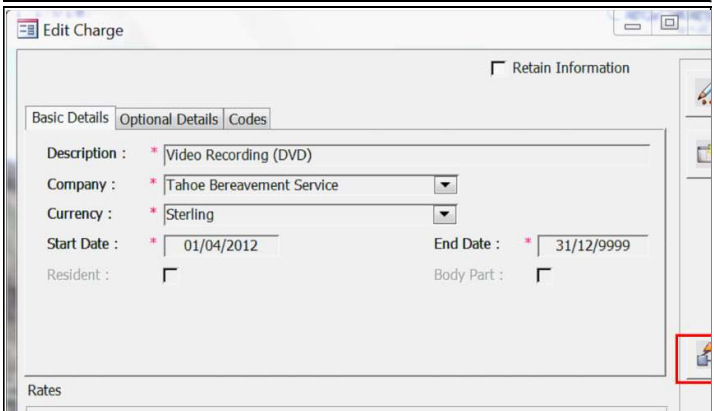
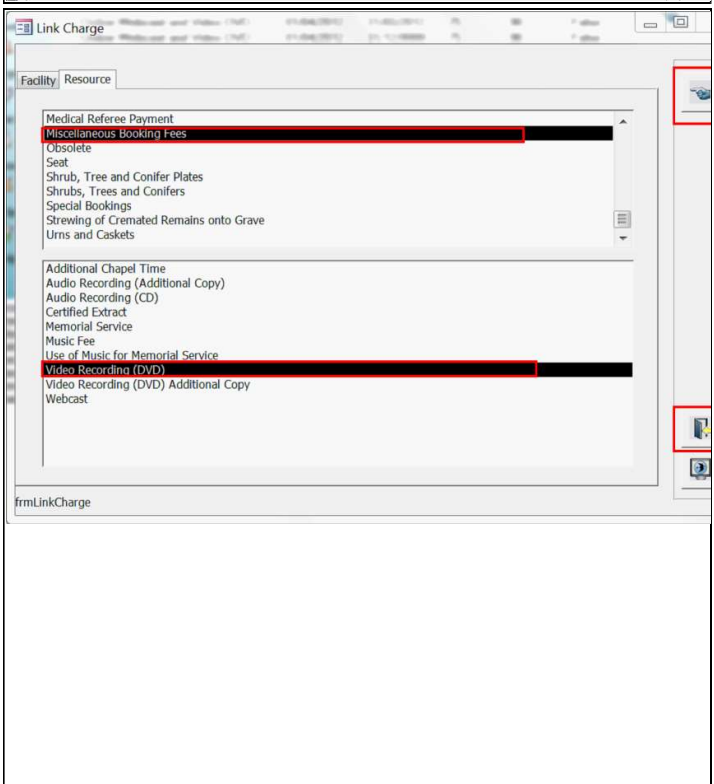
1. Click on the **Resource** tab
2. Use the top *Scroll bar* to search for the correct resource group
3. Click on the correct resource group to select it
4. Use the bottom *Scroll bar* to search for the correct resource
5. Click on the correct resource to select it
6. Click on the **Finger**
7. Click on the **Close** button
8. The memorial charge is now set up. For guidance

on how to assign an account code to this charge follow this link [Assign An Account Code To A Charge](#)

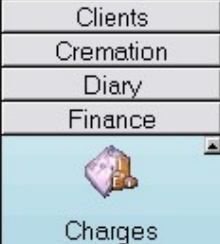
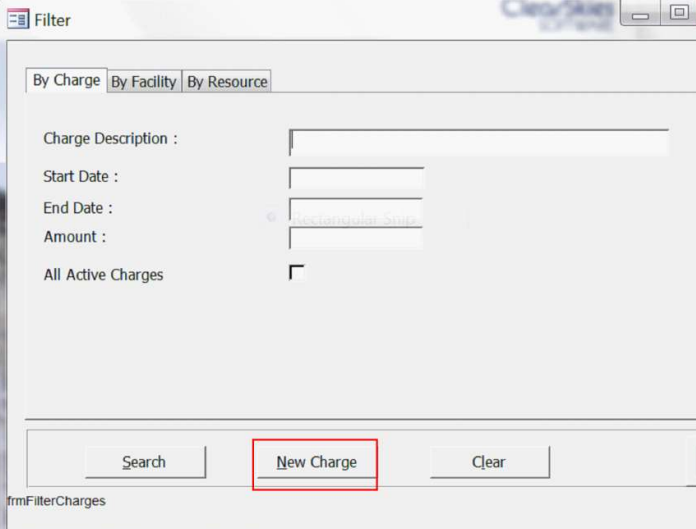
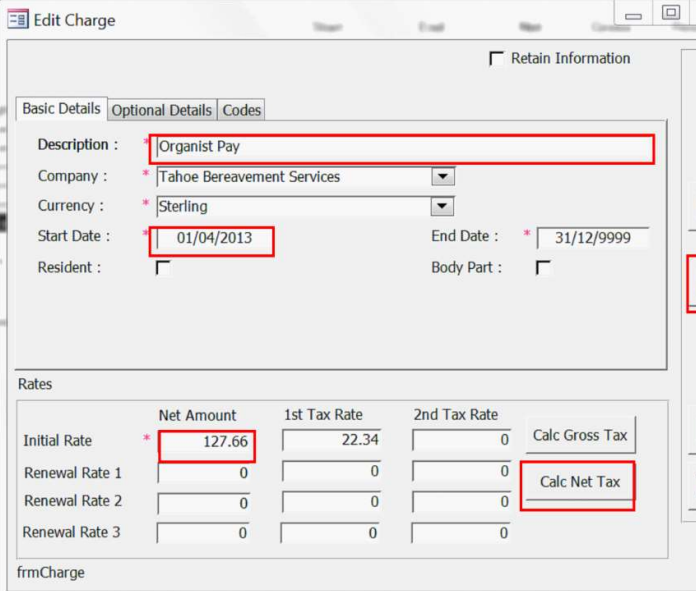
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Set up a Miscellaneous Charge

	<ol style="list-style-type: none"> 1. Select Finance from the <i>Outlook bar</i> on the left hand side. 2. Select Charges from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Filter</i> screen will be displayed. 2. Click on the New Charge button
	<p>The <i>Edit Charge</i> window will be displayed.</p> <ol style="list-style-type: none"> 1. Enter the <i>Charge Description</i> (This description will appear on the invoice or receipt) 2. Enter the <i>Start Date</i> (The date from when you will start using the miscellaneous item on BACASNG) 3. Enter cost of the miscellaneous item on <i>Initial Rate</i> row using one of the following methods: <ol style="list-style-type: none"> a. If the miscellaneous item does not carry a

	<p>VAT charge - enter full cost under <i>Net Amount</i>. Or if the item does carry VAT:</p> <ol style="list-style-type: none"> Enter full cost under <i>Net Amount</i> and click Calc Net Tax Button. or Enter net cost under <i>Net Amount</i> and click on Calc Gross Tax to calculate VAT on this amount. <p>4. Click on the Save button</p>
	<p>1. Click on the Link Charges button</p>
	<p>The <i>Link Charge</i> window will be displayed</p> <ol style="list-style-type: none"> Click on the Resource tab Use the top <i>Scroll bar</i> to search for the correct resource group Click on the correct resource group to select it Use the bottom <i>Scroll bar</i> to search for the correct miscellaneous item Click on the correct miscellaneous item to select it Click on the Finger Click on the Close button The miscellaneous item charge is now set up. For guidance on how to assign an account code to this charge follow this link Assign An Account Code To A Charge

Set up an Organist Pay Charge

	<p>NOTE: The Organist Pay charge will enable you to produce a report that summarises how much payment is due to each of your organists over a given period.</p>
	<ol style="list-style-type: none"> 1. Select Finance from the <i>Outlook bar</i> on the left hand side. 2. Select Charges from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Filter</i> screen will be displayed. 2. Click on the New Charge button
	<p>The <i>Edit Charge</i> window will be displayed.</p> <ol style="list-style-type: none"> 1. Enter Organist Pay as the <i>Description</i> 2. Enter the <i>Start Date</i> (The date from when you will start using Organist Summary Report). 3. Enter the amount you pay the organist in <i>Initial Rate</i> under net amount 4. Click on the Calc Net Tax button 5. Click on the Save button

1. Click on the **Link Charges** button

The *Link Charge* window will be displayed

1. Click on the **Resource** tab
2. Use the top *Scroll bar* to search for the *Organist Pay* group
3. Click on the *Organist Pay* group to select it
4. Click on *Organist Pay* in lower box to select it
5. Click on the **Finger**
6. Click on the **Close** button
7. The *Organist Pay* charge is now set up. For guidance on how to assign an account code to this charge follow this link [Assign An Account Code To A Charge](#)

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Set up a Service Charge for automatic fee generation (Non-resident)

1. Select **Finance** from the *Outlook bar* on the left hand side.
2. Select **Charges** from the expanded selection.

Filter

By Charge By Facility By Resource

Charge Description :

Start Date :

End Date :

Amount :

All Active Charges ☐

Search **New Charge** Clear

frmFilterCharges

1. The *Filter* screen will be displayed.
2. Click on the **New Charge** button

Edit Charge

☐ Retain Information

Basic Details Optional Details Codes

Description : *

Company : *

Currency : *

Start Date : * End Date : *

Resident : ☐ Body Part : ☐

Rates

	Net Amount	1st Tax Rate	2nd Tax Rate	
Initial Rate	* <input type="text" value="1500"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Calc Gross Tax
Renewal Rate 1	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Calc Net Tax
Renewal Rate 2	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	

frmCharge

The *Edit Charge* window will be displayed.

1. Enter the *Charge Description* (This description will appear on the invoice or receipt)
2. Enter the *Start Date* (The date from when you will start using this type of service on BACASNG)
3. Enter cost of the service for a non-resident deceased in *Initial Rate* row in the net amount field.
4. Click on the **Save** button

Edit Charge

☐ Retain Information

Basic Details **Optional Details** Codes

Start Age : 12 Years End Age : 999 Years

Start Time : 09:00 End Time : 16:00

Grave Type :
 Location :
 Units : 0

Rates

	Net Amount	1st Tax Rate	2nd Tax Rate	
Initial Rate *	1500	0	0	Calc Gross Tax
Renewal Rate 1	0	0	0	Calc Net Tax
Renewal Rate 2	0	0	0	

frmCharge

1. Click on the **Edit Pencil**
2. Click on the *Optional Details* tab –

NOTE: Optional Details enables the user to define the circumstances under which the fee is auto generated. If no optional details are set then the fee will always be generated for the service types linked into this charge. The fields can be put to use in the following ways:

3. Enter *Start Age* and *End Age* to define the age range to which this charge applies. In the example below the fee will only be generated if the deceased age is 12 and over. (If the same fee applies for all ages, then *Start Age* years must be set to Stillborn)
4. Enter *Start Time* and *End Time* to define the range of Diary times to which this fee applies. If the same fee applies to all time slots then these 2 fields should be left blank
5. Select a grave type if this fee only applies to burials for that type of grave. This option is rarely used as it is complicated to administer. Please leave blank and ask the Help Desk for Guidance
6. Select a Location if this fee only applies to burials for the location

selected. This option is rarely used as it is complicated to administer. Please leave blank and ask the Help Desk for Guidance if you want to make use of this option

7. Set a unit if you wish to apply this charge according to the depth of the burial. Please leave as 0 and ask the Help Desk for Guidance if you want to make use of this option

8. Click on **Save**

1. Click on the **Link Charges** button


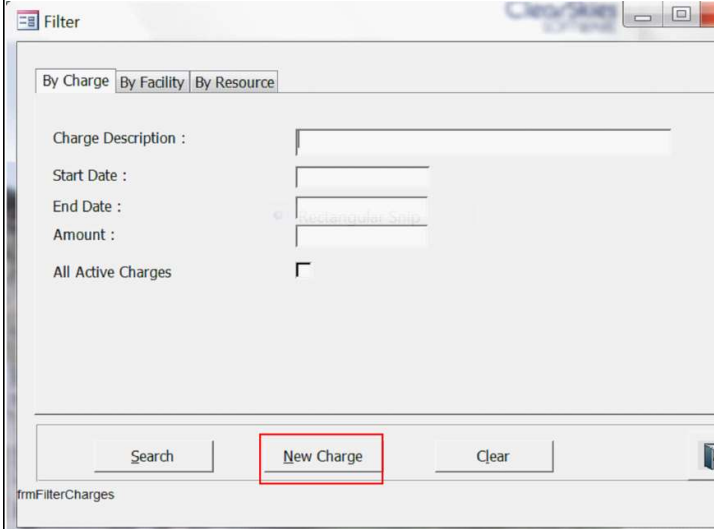
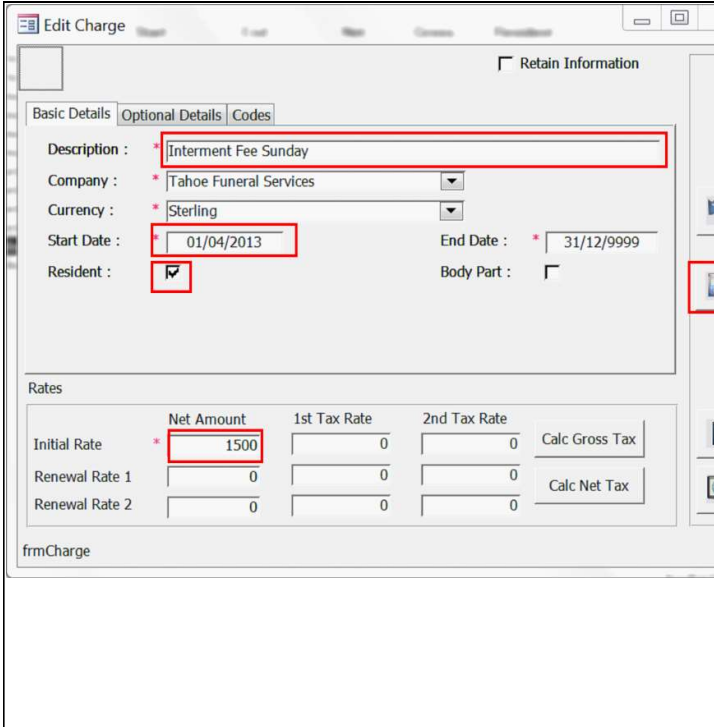
The *Link Charge* window will be displayed

1. Click on the **Facility** tab
2. Use the top *Scroll bar* to search for the correct Service type
3. Click on the **Finger**
4. Click on the **Close** button
5. The service charge is now set up. For guidance on how to assign an account code to this charge follow this link [Assign An Account Code To A](#)

Charge

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Set up a Service Charge for automatic fee generation (Resident)

	<ol style="list-style-type: none"> 1. Select Finance from the <i>Outlook bar</i> on the left hand side 2. Select Charges from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Filter</i> screen will be displayed. 2. Click on the New Charge button
	<ol style="list-style-type: none"> 1. Enter the <i>Charge Description</i> (This description will appear on the invoice or receipt) 2. Enter the <i>Start Date</i> (The date from when you will start using this type of service on BACASNG) 3. Ensure that the <i>Resident</i> box is ticked 4. Enter cost of the service for a resident deceased in <i>Initial Rate</i> row in the net amount field. 5. Click on the Save button

Edit Charge

Retain Information

Basic Details **Optional Details** Codes

Start Age : 12 Years End Age : 999 Years

Start Time : 09:00 End Time : 16:00

Grave Type :

Location :

Units : 0

Rates

	Net Amount	1st Tax Rate	2nd Tax Rate	
Initial Rate *	1500	0	0	Calc Gross Tax
Renewal Rate 1	0	0	0	Calc Net Tax
Renewal Rate 2	0	0	0	

frmCharge

1. Click on the **Edit Pencil**
2. Click on the *Optional Details* tab –

NOTE: Optional Details enables the user to define the circumstances under which the fee is auto generated. If no optional details are set then the fee will always be generated for the service types linked into this charge. The fields can be put to use in the following ways:

3. Enter *Start Age* and *End Age* to define the age range to which this charge applies. In the example below the fee will only be generated if the deceased age is 12 and over. (If the same fee applies for all ages, then *Start Age* years must be set to Stillborn)
4. Enter *Start Time* and *End Time* to define the range of Diary times to which this fee applies. If the same fee applies to all time slots then these 2 fields should be left blank
5. Select a grave type if this fee only applies to burials for that type of grave. This option is rarely used as it is complicated to administer. Please leave blank and ask the Help Desk for

Guidance

6. Select a Location if this fee only applies to burials at the location selected. This option is rarely used as it is complicated to administer. Please leave blank and ask the Help Desk for Guidance if you want to make use of this option
7. Set a unit if you wish to apply this charge according to the depth of the burial. Please leave as 0 and ask the Help Desk for Guidance if you want to make use of this option
8. Click on **Save**

Edit Charge

☐ Retain Information

Basic Details Optional Details Codes

Start Age : 12 Years End Age : 999 Years

Start Time : 09:00 End Time : 16:00

Grave Type :

Location :

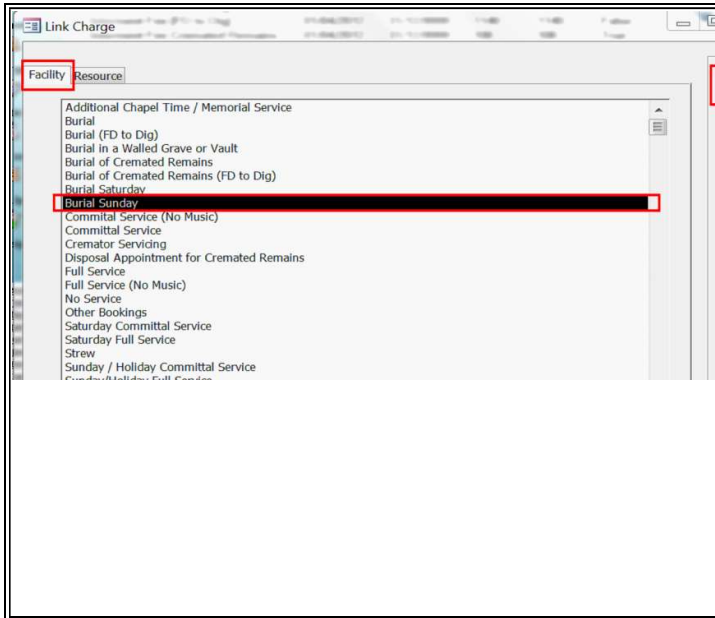
Units : 0

Rates

	Net Amount	1st Tax Rate	2nd Tax Rate
Initial Rate *	1500	0	0
Renewal Rate 1	0	0	0
Renewal Rate 2	0	0	0


frmCharge

1. Click on the **Link Charges** button

	<p>The <i>Link Charge</i> window will be displayed</p> <ol style="list-style-type: none"> 1. Click on the Facility tab 2. Use the top <i>Scroll bar</i> to search for the correct Service type 3. Click on the Finger 4. Click on the Close button 5. The service charge is now set up. For guidance on how to assign an account code to this charge follow this link Assign An Account Code To A Charge
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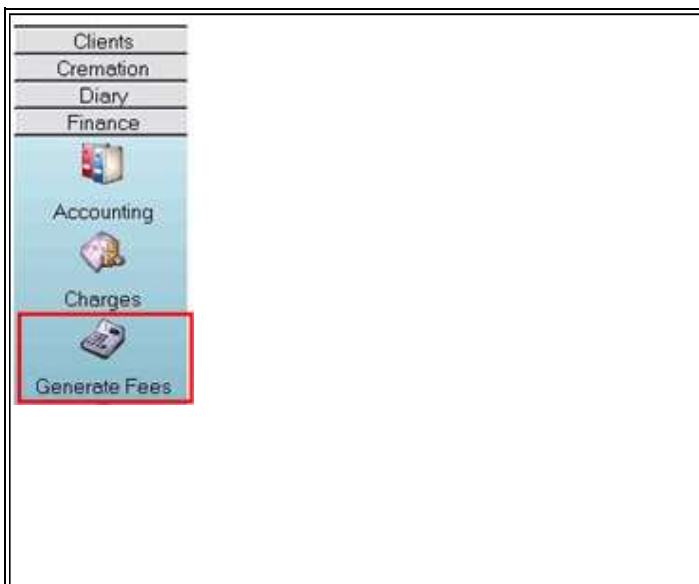
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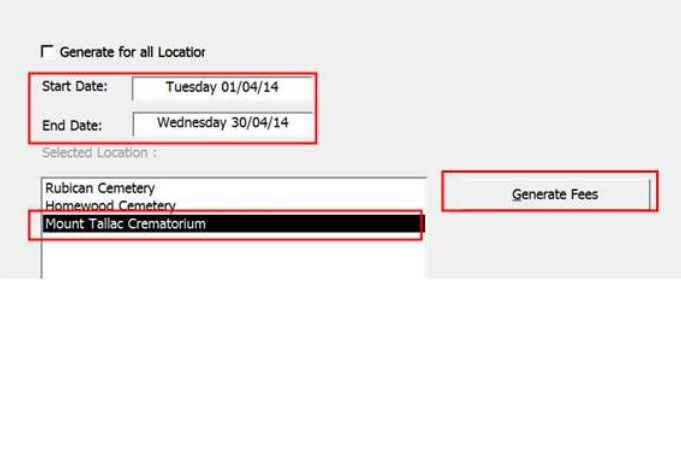
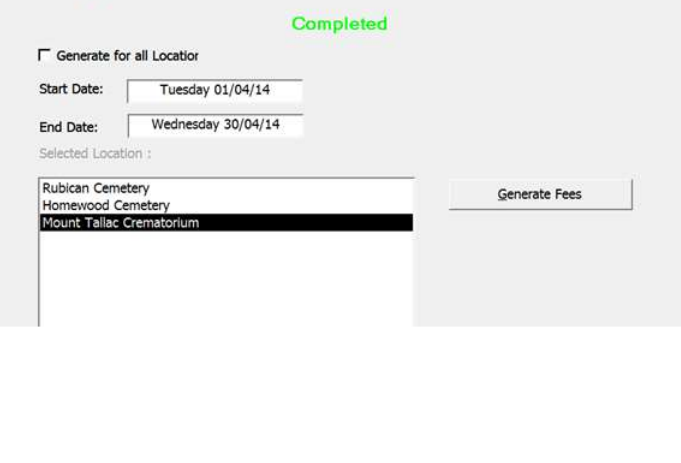
Generate Fees

 <p>Generate Fees</p>	<p>Generate Fees</p> <ul style="list-style-type: none"> • Generate all fees for a given period
---	--

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Generate fees for a period

	<p>Follow these notes to generate the fees for all bookings within a given financial period. If you follow the steps below, service fees may be generated depending on details such as the type of service selected for the booking, the age of the deceased and whether the deceased is resident or non-resident. Additionally fees may be generated from items that have been added under the miscellaneous item tab. It is recommended that the fees generated during this process are checked carefully before going on to issue the invoices either by</p>
---	---

	<p>printing an Invoice Checklist or Checking the fees Generated under the Finance Tab for each booking in the period</p> <p>Select Finance from the Outlook bar on the left hand side.</p> <p>Select Generate Fees from the expanded selection.</p>
	<p>The <i>Finance – Generate Fees</i> Screen will be displayed.</p> <p>Tick Generate for all Locations if you wish to generate fees for each diary. Otherwise select the location for which you wish to generate fees.</p> <p>Enter the Start Date in the <i>Start Date</i> field</p> <p>Enter the End Date in the <i>End Date</i> field</p> <p>Click on the Generate Fees button</p>
	<p>BACASNG will display the word Processing at the top of the screen followed by the word Completed.</p> <p>It is recommended that the fees generated during this process are checked carefully before going on to generate invoices either by printing an Invoice Checklist or Checking the fees Generated under the Finance Tab for each booking in the period.</p>

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Invoices

 <p>Invoices</p>	<p>Invoices</p> <ul style="list-style-type: none"> • Make an Invoice Entry that is not related to a Booking, Memorial or Grave • Search for an unprocessed invoice (Summary id 0) • Correct an Invoice Entry On An unprocessed Invoice (Summary id 0) From a Booking
---	--

- [Correct An Invoice Entry on an unprocessed invoice \(Summary id 0\) from the Finance Menu](#)
- [Delete an unprocessed Invoice \(Summary id 0\)](#)
- [Process \(number\) and Print All Invoices for a period](#)
- [Process \(number\) and print a single Invoice](#)
- [Search for an invoice that has been issued](#)
- [Receipt an Invoice](#)
- [Part receipt an invoice](#)
- [Clear an Invoice](#)
- [Reinstate an invoice](#)
- [Search for Outstanding \(Unpaid\) Invoices](#)
- [Search For cleared \(Paid\) Invoices](#)
- [Reprint a single Invoice](#)

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Correct an Invoice Entry On An unprocessed Invoice (Summary id 0) From a Booking

Burials		WSP	
Deceased :	Derek Hooper	Date :	Tue, 30/04/2013
Time :	10:00		
Funeral Director :	Tavistock And Williams Funeral Services	Service :	Burial of Cremated Remains
Location :			1171
Initial Info Deceased Details Burial Details Service Details Music Applicant Memorials Misc. Finance VO			
Appointment	1981	Deceased	3848
<p>* Date : 30/04/2013 <small>Client Request</small></p> <p>* Time : 10:00</p> <p>Privacy Public</p> <p>Status :</p> <p>* Diary :</p> <p>Rubican Cemetery</p> <p>* Location :</p> <p>Rubican Cemetery</p> <p>Type of Service :</p> <p>Burial of Cremated Remains</p> <p>View Funeral Dir. Private Clear</p> <p>Funeral Director :</p> <p>Tavistock And Williams Funeral Services</p>		<p>Title:</p> <p>Forenames: Derek</p> <p>Surname: * Hooper</p> <p>Maidenname:</p> <p>Other name:</p> <p>Address Line 1:</p> <p>Address Line 2:</p> <p>Address Line 3:</p> <p>Address Line 4:</p> <p>Address Line 5:</p> <p>Address Line 6:</p> <p>Post Code:</p> <p>Comments :</p>	

IMPORTANT: Only an Unnumbered (0) Invoice can be amended. (Once the invoice has been processed and has a number then it cannot be modified in any way. A second invoice must be raised to cancel out the error in the original invoice) see: [Correct An Error On A Numbered Invoice From A Booking.](#)

1. Find the relevant Booking record (Use Search to find the booking record SearchForBurialCremationScatteringExhumationRecord_or go to the relevant diary page to find the booking Find a Booking from the Diary).
2. Open the Booking record
3. Select the Finance Tab
4. Click on the pencil

Burials

Deceased : **Derek Hooper** Date : **Tue, 30/04/2013** Time : **10:00**

Funeral Director : **Tavistock And Williams Funeral Services** Service : **Burial of Cremated Remains**

Location : **1171**

Initial Info | Deceased Details | Burial Details | Service Details | Music | Applicant | Memorials | Misc. | Finance | VO

Total Invoice: **£275.00** Total Receipt:

Invoice	0	Burial of Cremated Remains - 30/04/ 260
Invoice	0	Wooden Cross - 30/04/2013 (1171) 15

Account To

☒ Funeral Director
☐ Applicant

Receipt :

Invoice

Add Item
Add Manual Item
Auto Generate Items

Delete Invoice

Delete Item
Auto Generated Items

Receipt

Add Items

The invoice details for the 0 invoice will be displayed

1. Select the item you wish to amend
2. Click on Delete Item

BACAS

Do you really want to delete the current record?

Yes No Cancel

You will be asked if you really want to delete the current record.

1. Click on **Yes**

Burials

Deceased : **Derek Hooper** Date : **Tue, 30/04/2013** Time : **10:00**

Funeral Director : **Tavistock And Williams Funeral Services** Service : **Burial of Cremated Remains**

Location : **1171**

Initial Info | Deceased Details | Burial Details | Service Details | Music | Applicant | Memorials | Misc. | Finance | VO

Total Invoice: **£275.00** Total Receipt:

Invoice	0	Burial of Cremated Remains - 30/04/ 260
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Account To

☒ Funeral Director
☐ Applicant

Receipt :

Invoice

Add Item
Add Manual Item
Auto Generate Items

Delete Invoice


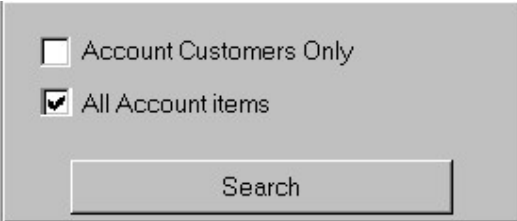
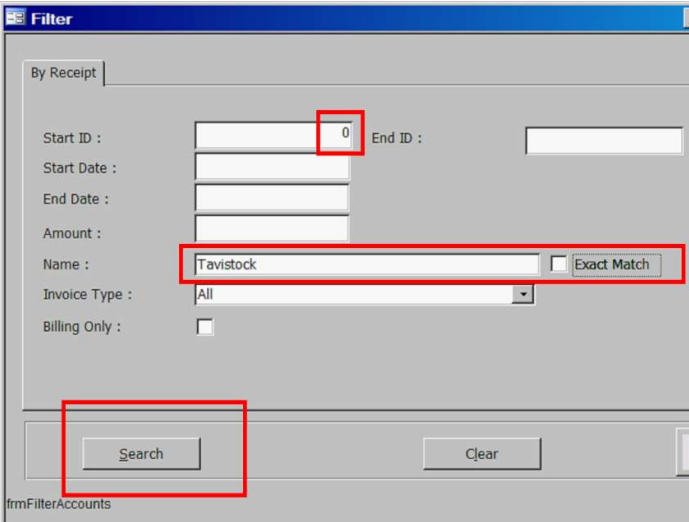
Delete Item
Auto Generated Items

Receipt

Add Items

The invoice item will be removed from the screen and the 0 invoice for the Funeral Director

1. Click on Save

	<p>IMPORTANT: Only an Unnumbered (0) Invoice can be amended. (Once the invoice has been processed and has a number then it cannot be modified in any way. A second invoice must be raised to cancel out the error in the original invoice. See: Correct an Error On A Numbered Invoice From Finance)</p> <p>Select Finance from the Outlook bar on the left hand side.</p> <ol style="list-style-type: none"> 1. Select Invoices from the expanded selection. <p>The invoice screen will be displayed.</p>
	<ol style="list-style-type: none"> 1. To search for the invoice you wish to receipt, tick All Account Items and then click on the Search button in the top right hand corner of the screen.
	<p>The search filter screen will open.</p> <ol style="list-style-type: none"> 1. Enter 0 the summary number in <i>Start ID</i> box and click on Search 2. Enter the name of the <i>Funeral Director</i> or <i>Mason</i> in the <i>Name</i> box and click on Search

List of Invoices

Summary	Total	First	Surname
0	1520		Tavistock And Williams Funeral Services

frmViewInvoices

☐ Account Customers Only
☒ All Account Items

Please Select Process Date
 25/04/2013
 This date will print all of the items on the invoice that are dated before it.

Please Select Invoice Date
 24/04/2013
 This is the date that is printed on the invoice

The invoice will be displayed in the Search Results:

1. Click on the *Invoice* to select it
2. Click on the **Pencil**

Update Invoice

Payee : Tavistock And Williams Funeral Services
 21 Town Square,

Date : Wednesday 24/04/13
 Organization : Tahoe Company Ltd
 Currency : Sterling
 Account Code :
 Description :
 Amount : VAT :
 Location :
 Reference : 0

Items

Burial of Cremated Remains - 05/12/2007 (1151) Christine Moffat - Rubric	250	0
Cremation - 29/04/2013 (1108) Mr Justice ~ Mount Tallac Crematorium	350	0
Cremation - 30/04/2013 (1109) Mr Ron Pickering ~ Mount Tallac Cremat	400	0
Burial of Cremated Remains - 30/04/2013 (1171) Derek Hooper ~	260	0
Burial of Cremated Remains - 30/04/2013 (1172) Mr Ian Donaldson ~	260	0

frmUpdateInvoice

The Update Invoice screen will be displayed.

1. Click on the Item to be deleted
2. Click on the **Delete Item** button

BACAS

Do you really want to delete the current record?

You will be asked if you really want to delete the item

1. Click on the **Yes** button

Update Invoice Payee : Tavistock And Williams Funeral Services 21 Town Square,		The Invoice line will be removed from the display (The entry on the Finance tab for the Booking/Memorial/Grave tab will also be updated.) 1. Click on the EXIT button								
Date :	* Wednesday 08/05/13									
Organization :	* Tahoe Company Ltd									
Currency :	* Sterling									
Account Code :										
Description :	*									
Amount :	* VAT :									
Location :										
Reference :	0									
Items <table border="1"> <tr> <td>Cremation - 30/04/2013 (1109) Mr Ron Pickering ~ Mount Tallac Crem 400</td> <td>0</td> <td></td> </tr> <tr> <td>Burial of Cremated Remains - 30/04/2013 (1171) Derek Hooper ~</td> <td>260</td> <td>0</td> </tr> <tr> <td>Burial of Cremated Remains - 30/04/2013 (1172) Mr Ian Donaldson ~</td> <td>260</td> <td>0</td> </tr> </table>			Cremation - 30/04/2013 (1109) Mr Ron Pickering ~ Mount Tallac Crem 400	0		Burial of Cremated Remains - 30/04/2013 (1171) Derek Hooper ~	260	0	Burial of Cremated Remains - 30/04/2013 (1172) Mr Ian Donaldson ~	260
Cremation - 30/04/2013 (1109) Mr Ron Pickering ~ Mount Tallac Crem 400	0									
Burial of Cremated Remains - 30/04/2013 (1171) Derek Hooper ~	260	0								
Burial of Cremated Remains - 30/04/2013 (1172) Mr Ian Donaldson ~	260	0								

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Clear an Invoice

<div> <div> <div>Clients</div> <div>Cremation</div> <div>Diary</div> <div>Finance</div> <div>Accounting</div> <div>Charges</div> <div>Generate Fees</div> <div>Invoices</div> </div> </div>	<p>NOTE: An Invoice is cleared (marked as paid) when it has been fully receipted. However BACAS will allow you to clear (mark as paid) an invoice without going through the process of creating a receipt, following these instructions:</p> <p>Select Finance from the Outlook bar on the left hand side.</p> <p>Select Invoices from the expanded selection.</p> <p>The <i>Invoice</i> screen will be displayed.</p>
<div> <input type="checkbox"/> Account Customers Only <input checked="" type="checkbox"/> All Account items <input type="button" value="Search"/> </div>	<p>To search for the invoice you wish to clear, tick <i>All Account items</i> in the top right hand corner of the screen</p> <p>Click on the Search button in the top right hand corner of the screen.</p>

Filter

By Receipt

Start ID : End ID :

Start Date :

End Date :

Amount :

Name : ☒ Exact Match

Invoice Type :

Billing Only : ☐

frmFilterAccounts

The search *Filter* screen will open.

1. If known, enter the Invoice (Summary) number in *Start ID* box.
2. Click on **Search**

Filter

By Receipt

Start ID : End ID :

Start Date :

End Date :

Amount :

Name : ☐ Exact Match

Invoice Type :

Billing Only : ☐

frmFilterAccounts

Alternatively, enter the name of the *Funeral Director* or *Mason* in the *Name* box

Click on **Search**

List of Invoices

Summar	Total	First	Surname
0	1199.5		Tavistock And Williams Funeral Services
71	366.5		Tavistock And Williams Funeral Services
82	491.75		Tavistock And Williams Funeral Services
110	1035		Tavistock And Williams Funeral Services

☐ Account Customers Only
☒ All Account items

Please Select Process Date
21/05/2013
This date will print all of the items on the invoice that are dated before it.

Please Select Invoice Date
20/05/2013
This is the date that is printed on the invoice

frmViewInvoices

The invoice will be displayed in the search results *List of invoices*.

1. Ensure the Invoice is highlighted (Use Summary ID or amount for guidance)
2. Click on the Edit pencil

Update Invoice

Payee : Tavistock And Williams Funeral Services

21 Town Square,

Date : * Monday 20/05/13

Organization : * Tahoe Company Ltd

Currency : * Sterling

Account Code : *

Description : *

Amount : * VAT :

Location : *

Reference : 0

Calc Gross VAT

Calc Net VAT

Items

Burial of Cremated Remains - 30/04/2013 (1171) Derek Hooper ~ -	260	0
Wooden Cross - 30/04/2013 (1171) Derek Hooper ~ -	15	0
Burial of Cremated Remains - 30/04/2013 (1172) Mr Ian Donaldson ~	260	0
Cremation - 30/04/2013 (1109) Mr Ron Pickering ~ Mount Tallac Cren	400	0
Orgainst Pay - 30/04/2013 (1109) Mr Ron Pickering ~ Mount Tallac Cr	85.11	14.89

Alter Location

frmUpdateInvoice

The *Update Invoice* screen will open

- Click on the Clear Invoice button
- Click on the Exit button

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Delete an unprocessed Invoice (Summary id 0)

Clients

Cremation

Diary

Finance

Accounting

Charges

Generate Fees

Invoices

IMPORTANT: Only an Unnumbered (0) Invoice can be deleted. (Once the invoice has a number then it cannot be modified in any way. A second invoice must be raised to cancel any error in the original invoice) see: Correct an Error On A Numbered Invoice From Finance A 0 Invoice can only be deleted by removing each invoice item that makes up the total amount of the invoice.

Select **Finance** from the Outlook bar on the left hand side.

- Select **Invoices** from the expanded selection.

The invoice screen will be displayed.

☐ Account Customers Only
 ☒ All Account items

Search

- To search for the invoice you wish to receipt, **tick All Account Items** and then click on the **Search** button in the top right hand corner of the screen.

Filter

By Receipt

Start ID : 0 End ID :

Start Date :

End Date :

Amount :

Name : Tavistock Exact Match

Invoice Type : All

Billing Only :

Search Clear

frmFilterAccounts

The search filter screen will open.

1. Enter 0 the summary number in *Start ID* box and click on **Search**
2. Enter the name of the *Funeral Director* or *Mason* in the *Name* box and click on **Search**

List of Invoices

Summary Total	First	Surname
0	13520	Tavistock And Williams Funeral Services

Account Customers Only

All Account Items

Search

Please Select Process Date

25/04/2013

This date will print all of the items on the invoice that are dated before it.

Please Select Invoice Date

24/04/2013

This is the date that is printed on the invoice

Print Outstanding Invoices

Print Selected Invoice

Print Custom Invoice

Receipt Invoice

frmViewInvoices

The invoice will be displayed in the Search Results:

1. Click on the *Invoice* to select it
2. Click on the **Pencil**

Update Invoice

Payee : Tavistock And Williams Funeral Services

21 Town Square,

Date : Wednesday 24/04/13

Organization : Tahoe Company Ltd

Currency : Sterling

Account Code :

Description :

Amount : VAT :

Location :

Reference : 0

Add Item

Calc Gross VAT

Calc Net VAT

Items

Burial of Cremated Remains - 05/12/2007 (1151) Christine Moffet - Rubic 250	0
Cremation - 29/04/2013 (1108) Mr Jusice ~ Mount Taisee Crematorium 350	0
Cremation - 30/04/2013 (1109) Mr Ron Pickering ~ Mount Tallac Cremat	400
Burial of Cremated Remains - 30/04/2013 (1171) Derek Hooper ~	260
Burial of Cremated Remains - 30/04/2013 (1172) Mr Ian Donaldson ~	260

Alter Location

Delete Item

frmUpdateInvoice

The Update Invoice screen will be displayed.

1. Click on the Item to be deleted
2. Click on the **Delete Item** button

BACAS

Do you really want to delete the current record?

Yes No Cancel

You will be asked if you really want to delete the item

1. Click on the **Yes** button

Update Invoice

Payee : Tavistock And Williams Funeral Services
21 Town Square,

Date : * Wednesday 08/05/13
Organization : * Tahoe Company Ltd
Currency : * Sterling
Account Code :
Description : *
Amount : * VAT :
Location :
Reference : 0

Items

Cremation - 30/04/2013 (1109) Mr Ron Pickering ~ Mount Tallac Cren 400	0
Burial of Cremated Remains - 30/04/2013 (1171) Derek Hooper ~ ~ 260	0
Burial of Cremated Remains - 30/04/2013 (1172) Mr Ian Donaldson ~ 260	0

frmUpdateInvoice

The Invoice line will be removed from the display
(The entry on the Finance tab for the Booking/Memorial/Grave tab will also be updated.)

Update Invoice

Payee : Tavistock And Williams Funeral Services
21 Town Square,

Date : * Wednesday 08/05/13
Organization : * Tahoe Company Ltd
Currency : * Sterling
Account Code :
Description : *
Amount : * VAT :
Location :
Reference : 0

Items


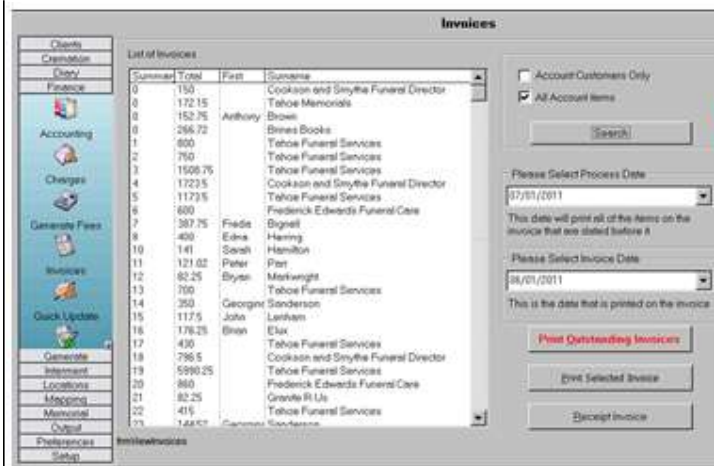
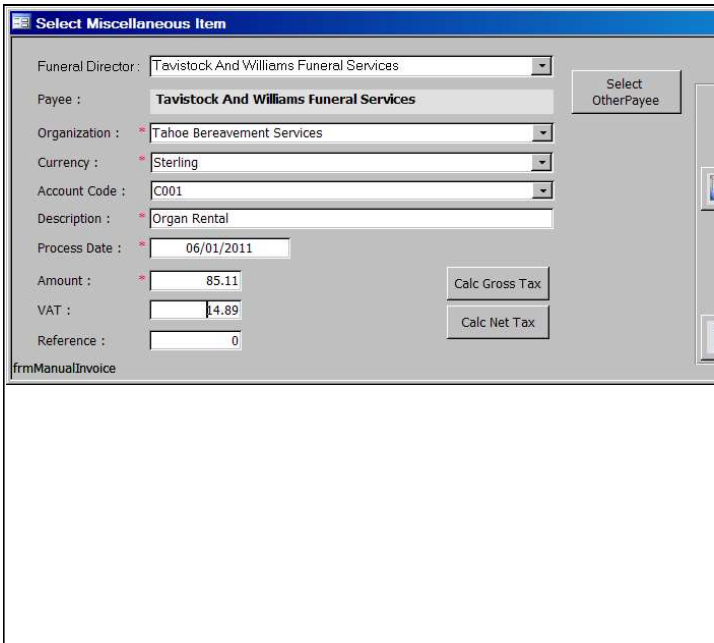
frmUpdateInvoice

Repeat the previous 3 steps until all invoice lines have been deleted.

The 0 invoice for the Funeral Director will be deleted at this stage.

Click on the **EXIT** button


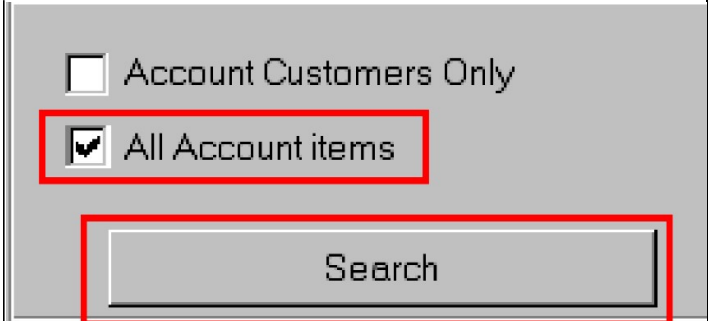
How to Create a manual Invoice

	<p>Select Finance from the <i>Outlook bar</i> on the left hand side.</p> <p>Select Invoices from the expanded selection.</p>
	<p>The <i>Invoices</i> screen will be displayed</p> <p>Click on the New button</p>
	<ol style="list-style-type: none"> 1. Select a Funeral Director from the drop down selection on the <i>Funeral Director</i> box (If the Funeral Director does not appear on the drop down list or you wish to select a mason then click on the Select Payee button) 2. Select an account code for the fee that you are adding using the selection arrow in the <i>Account Code</i> field 3. Type in a description of the fee you are adding in the <i>Description</i> field 4. Enter the amount of the fee with VAT in the

	<p><i>Amount and VAT fields</i></p> <p>5. Click on Save</p> <p><u>Either</u> An unnumbered invoice (Summary id 0) will be created for the Funeral Director</p> <p><u>Or</u> If an unnumbered invoice for this FD already exists, this fee will be added to the unnumbered invoice.</p>
--	---

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Process (number) and Print All Invoices for a period

	<p>BACASNG can automatically process (number) and issue (print) invoices for Funeral Directors and Stone Masons that are set up for billing (Follow this link for guidance on setting up A Funeral Director for Billing)</p> <p>Select Finance from the Outlook bar on the left hand side.</p> <p>1. Select Invoices from the expanded selection.</p> <p>The invoice screen will be displayed.</p>
	<p>1. To search for the invoice you wish to receipt, tick <i>All Account Items</i> and then click on the Search button in the top right hand corner of the screen.</p>

Filter

By Receipt

Start ID : 0 End ID :

Start Date :

End Date :

Amount :

Name : ☐ Exact Match

Invoice Type : All

Billing Only : ☐

Search Clear

frmFilterAccounts

The search filter screen will open.

1. Enter 0 the summary number in *Start ID* box.
2. Click on **Search**

List of Invoices

Summary	Total	First	Surname
0	20		Tahoe Funeral Services
0	010		Cookson and Smythe Funeral Director
0	1199.5		Tavistock And Williams Funeral Services
0	117.5		Thomas Briggs Funeral Directors
0	1630		John Turner
0	1080		Kerry Brand
0	82.25	Sarah	Leppard
0	82.25	John	Balsom
0	380	Tom	Brand
0	152.75	John	Reive
0	500	Tina	Logan
0	82.25	Anne	Parsons
0	535.65	Duncan	Wilson
0	1200		Tahoe Funeral Services

Account Customers Only: ☐
All Account items: ☒

Search

Please Select Process Date: 23/05/2013
This date will print all of the items on the invoice that are dated before it.

Please Select Invoice Date: 22/05/2013
This is the date that is printed on the invoice

Print Outstanding Invoices
Print Selected Invoice
Print Custom Invoice
Receipt Invoice

frmViewInvoices

A list of 0 (unissued) invoices for all Funeral Directors will be displayed in the *List of Invoices*

SIDE NOTE: You may view the content of any one of the 0 Invoices:

- a) Click on the Invoice you wish to view (it will become highlighted)
- b) Click on the Pencil

Update Invoice

Payee : Tavistock And Williams Funeral Services
21 Town Square,

Date : Wednesday 08/05/13

Organization : Tahoe Company Ltd

Currency : Sterling

Account Code :

Description :

Amount : VAT :

Location :

Reference : 0

Add Item

Calc Gross VAT

Calc Net VAT

Items

Description	Date	Amount
Burial of Cremated Remains - 06/05/2013 (1173) Mrs Rose Dowling ~ 260	06/05/2013	0
Burial Fee - 07/05/2013 (1174) Harrington ~ - Rubican Cemetery 5390	07/05/2013	0
Refund Wooden cross (Inv110) 30/04/2013 (1171) Derek Hooper ~ -15	30/04/2013	0
Cremation - 06/05/2013 (1112) Mrs Sexton ~ Mount Tallac Crematorium 400	06/05/2013	0
Velum Plaque - 30/04/2013 (1109) Mr Ron Pickering ~ Mount Tallac 140	30/04/2013	24.5

Alter Location

Delete Item

frmUpdateInvoice

The Update invoice screen will open.

An unnumbered invoice will possibly contain items that fall into more than one accounting period. In the example below for the Funeral Director Tavistock and Williams, there are two entries for the month of April (Hooper and Pickering) and 3 entries for the month of May (Dowling, Harrington and Sexton).

- a) Click on the exit button to return to the *List of Invoices*

List of Invoices

Summar	Total	First	Surname
0	20		Tahoe Funeral Services
0	910		Cookson and Smythe Funeral Director
0	1199.5		Tavistock And Williams Funeral Services
0	117.5		Thomas Briggs Funeral Directors
0	1630		John Turner
0	1080		Kerry Brand
0	82.25	Sarah	Leppard
0	82.25	John	Balsom
0	380	Tom	Brand
0	152.75	John	Reive
0	500	Tina	Logan
0	82.25	Anne	Parsons
0	535.65	Duncan	Wilson
0	1200		Tahoe Funeral Services

frmViewInvoices

☐ Account Customers Only
☒ All Account Items

Please Select Process Date

This date will print all of the items on the invoice that are dated before it.

Please Select Invoice Date

This is the date that is printed on the invoice

Important: Once an invoice has been processed and allocated a number it must be issued and so it is important to check the content of each of the 0 invoices. It is advisable to [print an invoice checklist](#) before you proceed to step 6. The Invoice Checklist shows what will appear on the invoice for each Funeral Director. Amendments can easily be made to the 0 invoice up until Step 6 below. ([Amend an Invoice from a booking/Amend and Invoice from Finance](#))

Enter the *Process Date*: In this example we are processing April's Invoices and a date of 01/05/2013 is entered so that BACAS will process (number) all items up until and including 30/04/2013. For the example of Tavistock and Williams fees Hooper and Pickering will be processed. The items for May (Dowling, Harrington and Sexton) will be left in the 0 invoice.

Enter the *Invoice Date*. This is the date that you would like to appear at the top of the invoice. Click on **Print Outstanding Invoices**

A screen will appear asking for confirmation that you want to process and print all outstanding invoices
Click on **Yes**

BACAS

Do you want to print all outstanding invoices?

Report List

Reports

Report Category

Batch Category

Reports

☒ Invoices - Auto Produced

Select all Clear all

Cancel Next

frmReportList

The Report List will appear
Select the *Invoices Auto
Produced* from the list
(*wording may vary slightly)
Click on **Next**

Report List

Parameters

	Start	End
Invoice:	115	116

Email :

Cancel

Preview ☐

Print

Email

frmReportList


Process (number) and print a single Invoice

Clients


Cremation

Diary


Finance




Accounting



Charges



Generate Fees



Invoices

Select **Finance** from the Outlook bar on the left hand side.

1. Select **Invoices** from the expanded selection.

The invoice screen will be displayed.

<div> <input type="checkbox"/> Account Customers Only <input checked="" type="checkbox"/> All Account items <div>Search</div> </div>	<ol style="list-style-type: none"> To search for the invoice you wish to receipt, tick All Account Items and then click on the Search button in the top right hand corner of the screen. 								
<div> <div>Filter</div> <div>By Receipt</div> <div> <div>Start ID : <input type="text" value="0"/></div> <div>End ID : <input type="text"/></div> </div> <div> <div>Start Date : <input type="text"/></div> <div>End Date : <input type="text"/></div> </div> <div> <div>Amount : <input type="text"/></div> </div> <div> <div>Name : <input type="text" value="Tavistock"/></div> <div><input type="checkbox"/> Exact Match</div> </div> <div> <div>Invoice Type : <input type="text" value="All"/></div> </div> <div> <div>Billing Only : <input type="checkbox"/></div> </div> <div> <div>Search</div> <div>Clear</div> </div> </div>	<p>The search filter screen will open.</p> <ol style="list-style-type: none"> Enter 0 the summary number in <i>Start ID</i> box and click on Search Enter the name of the <i>Funeral Director</i> or <i>Mason</i> in the <i>Name</i> box and click on Search 								
<div> <div>List of Invoices</div> <table border="1"> <thead> <tr> <th>Summary</th> <th>Total</th> <th>First</th> <th>Surname</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>1199.5</td> <td></td> <td>Tavistock And Williams Funeral Services</td> </tr> </tbody> </table> <div> <div> <input type="checkbox"/> Account Customers Only <input checked="" type="checkbox"/> All Account items <div>Search</div> </div> <div> <div>Please Select Process Date</div> <div>08/05/2013</div> <div>This date will print all of the items on the invoice that are dated before it.</div> </div> <div> <div>Please Select Invoice Date</div> <div>08/05/2013</div> <div>This is the date that is printed on the invoice</div> </div> <div> <div>Print Outstanding Invoices</div> <div>Print Selected Invoice</div> <div>Print Custom Invoice</div> <div>Receipt Invoice</div> </div> </div> </div>	Summary	Total	First	Surname	0	1199.5		Tavistock And Williams Funeral Services	<p>The 0 invoice for the Funeral Director will be displayed in the Search Results:</p> <ol style="list-style-type: none"> Click on the <i>Invoice</i> to select it Click on the Pencil
Summary	Total	First	Surname						
0	1199.5		Tavistock And Williams Funeral Services						

Update Invoice

Payee : Tavistock And Williams Funeral Services
21 Town Square,

Date : * Wednesday 08/05/13
Organization : * Tahoe Company Ltd
Currency : * Sterling
Account Code :
Description : *
Amount : * VAT :
Location :
Reference : 0

Buttons: Add Item, Calc Gross VAT, Calc Net VAT

Items

Burial of Cremated Remains - 06/05/2013 (1173) Mrs Rose Dowling ~	260	0
Burial Fee - 07/05/2013 (1174) Harrington ~ - Rubican Cemetery	390	0
Refund Wooden cross (Inv110) 30/04/2013 (1171) Derek Hooper ~	15	0
Cremation - 06/05/2013 (1112) Mrs Sexton ~ Mount Tallac Crematori	400	0
Vellum Plaque - 30/04/2013 (1109) Mr Ron Pickering ~ Mount Tallac	140	24.5

Buttons: Alter Location, Delete Item

frmUpdateInvoice

The Update Invoice screen will be displayed.

List of Invoices

Summar	Total	First	Surname
0	1199.5		Tavistock And Williams Funeral Services

Buttons: Search

☐ Account Customers Only
☒ All Account items

Please Select Process Date
01/05/2013
This date will print all of the items on the invoice that are dated before it.

Please Select Invoice Date
08/05/2013
This is the date that is printed on the invoice.

Print Outstanding Invoices

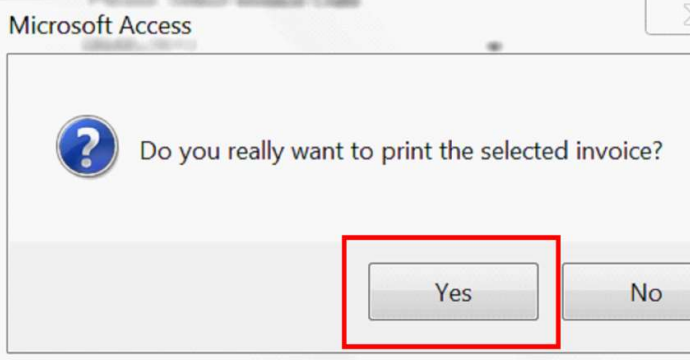
Buttons: Print Selected Invoice, Print Custom Invoice, Receipt Invoice

rmViewInvoices

This will show a list of all invoice items for this Funeral Director that have not yet been processed and will possibly contain items that fall into more than one accounting period.

In the example above there are two entries for the month of April (Hooper and Pickering) and 3 entries for the month of May (Dowling, Harrington and Sexton). **Important:** Once an invoice has been processed and allocated a number it cannot be amended and must be issued so at this stage it is important to check that the detail showing on the screen above is correct. For invoices that contain a lot of items it would be advisable to [print an invoice checklist](#) at this stage and check this carefully). Amendments can easily be made to the 0 invoice up until the next stage. ([Amend an Invoice from a booking/Amend and Invoice from Finance](#))

1. Click on the **Exit** button to return to the *List of Invoices* screen
2. Enter the *Process Date*: In this example we are processing April's Invoices and a date of 01/05/2013 is entered so that BACAS will

	<p>process (number) all items up until and including 30/04/2013(Hooper and Pickering). The items for May (Dowling, Harrington and Sexton) will be left in the 0 invoice.</p> <p>3. Enter the <i>Invoice Date</i>. This is the date that you would like to appear at the top of the invoice.</p> <p>4. Click on Print Selected Invoice</p>
	<p>A screen will appear asking for confirmation that you intend to process and print the selected invoice.</p> <p>Click on Yes</p>

Report List

Reports

Report Category Invoice

Batch Category

Reports

☒ Single invoice

Select all Clear all

Cancel Next

frmReportList

The Report List will appear
Select the *Single Invoice*
from the list
Click on **Next**


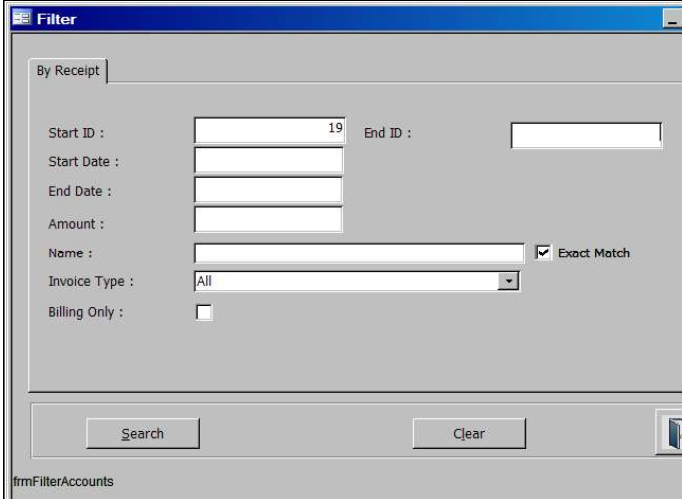
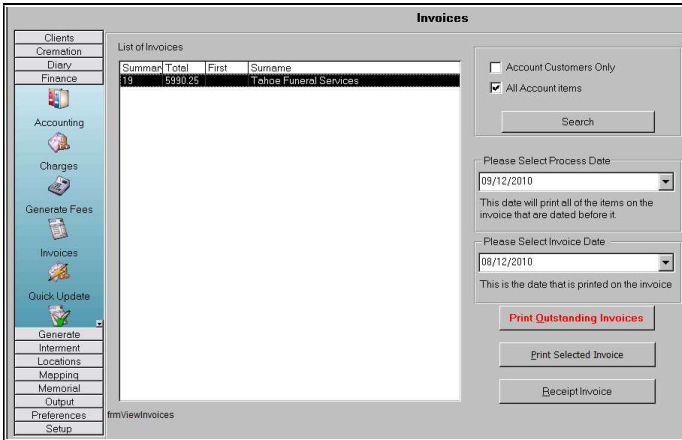
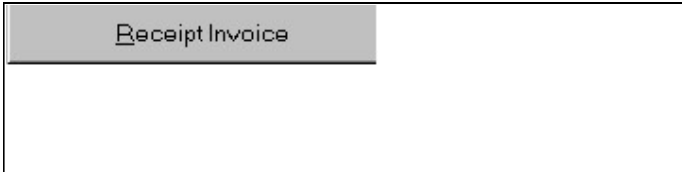
Report List										
Parameters										
	<table border="1"> <thead> <tr> <th></th> <th>Start</th> <th>End</th> </tr> </thead> <tbody> <tr> <td>Date:</td> <td>09/05/2013</td> <td></td> </tr> <tr> <td>Invoice:</td> <td>113</td> <td></td> </tr> </tbody> </table>		Start	End	Date:	09/05/2013		Invoice:	113	
	Start	End								
Date:	09/05/2013									
Invoice:	113									
Email :										
<input type="button" value="Cancel"/>	<input type="button" value="Preview"/> <input type="checkbox"/>									
<input type="button" value="Print"/>	<input type="button" value="Email"/>									
frmReportList										

On the next Screen click on **Print**

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Receipt an Invoice

<div> <div>Clients</div> <div>Cremation</div> <div>Diary</div> <div>Finance</div> <div>Accounting</div> <div>Charges</div> <div>Generate Fees</div> <div>Invoices</div> </div>	<p>Select Finance from the Outlook bar on the left hand side.</p> <p>Select Invoices from the expanded selection.</p> <p>The invoice screen will be displayed.</p>
--	--

	<p>To search for the invoice you wish to receipt, tick <i>Account Customers Only</i> and then click on the Search button in the top right hand corner of the screen.</p>
	<p>The search filter screen will open.</p> <p>If the invoice summary number is known, enter the summary number in <i>Start ID</i> box and click on Search</p>
	<p>The invoice will be displayed in the search results:</p>
	<p>Click on the Invoice entry to highlight.</p> <p>Click on the Receipt Invoice button in the bottom right hand corner of the screen.</p>

Create New Receipt

Funeral Director :

Payee :

Receipt Date : Type of Payment :

Payment Reference :

Comments :

Organization :

Currency :

Account Code :

Description :

Amount : VAT : Total :

Location :

BACASID :

Receipt Items			
Cremation - 14/02/2005 (1000) John Mr John Keller -	350	0	
Burial Fee - 14/12/2004 (0) Albert James Haddrell - Rubican Cem...	350	0	
Burial Fee - 16/12/2004 (0) Brian Campbell - Rubican Cemetery	350	0	
Bearer (Double) - 16/12/2004 (0) Brian Campbell - Rubican Cem...	20	3.5	
Burial Fee - 14/12/2004 (0) Albert James Haddrell - Rubican Cem...	350	0	

frmReceipt2

The *Create New Receipt* Screen will open. The Funeral Director/Mason details will be displayed at the top of the screen and all the items on the invoice listed at the bottom of the screen.

1. Select the payment type under *Type of Payment*
2. Enter *Payment Reference* details (for example Cheque No) and *Payment Comments* (For example a reference to original invoice) if desired
3. If you wish to receipt the whole invoice, click on the **Printer** button now.
4. If you wish to receive selected items in the invoice see [How to Part receipt an Invoice](#)

Report List

Report Category :

Batch Category :

Reports

☒ Receipt

frmReportList

Report List

Parameters

Start :

End :

Invoice :

frmReportList

BACAS will display a report list.

1. Select Receipt by ticking the box.
2. Click on the **Next** button
3. On the following screen click on **Print**

Cremation

Deceased : Date : Time :

Funeral Director : Service :

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Invoice	19	Sterling	Cremation - 14/02/2005 (1000) John Mr John Ke	350	0
Receipt	62	Sterling	Cremation - 14/02/2005 (1000) John Mr John Ke	350	0

Account To

☒ Funeral Director

☐ Applicant

Receipt :

Add

Delete

Receipt

frmCremations

The receipt will print and the above process will have produced a record for the numbered receipt. (Even in the case of the receipt failing to print).

The above process will also update the finance tab of each of each of burials/cremations with invoice details included in the invoice:

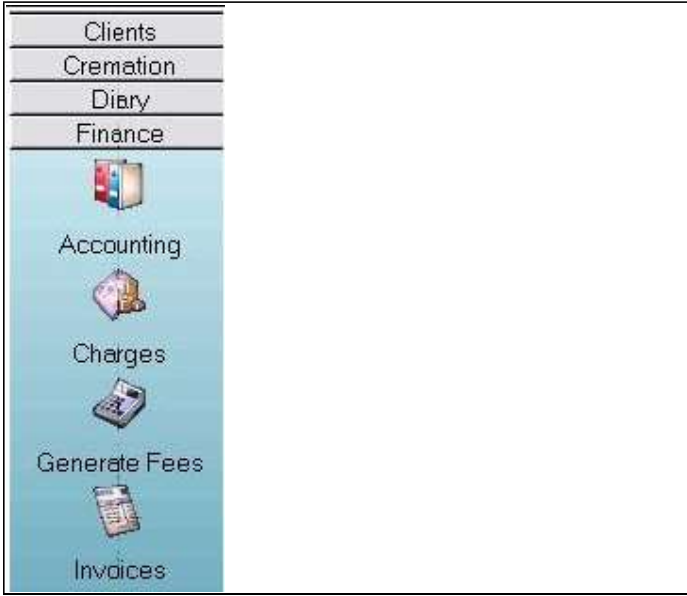

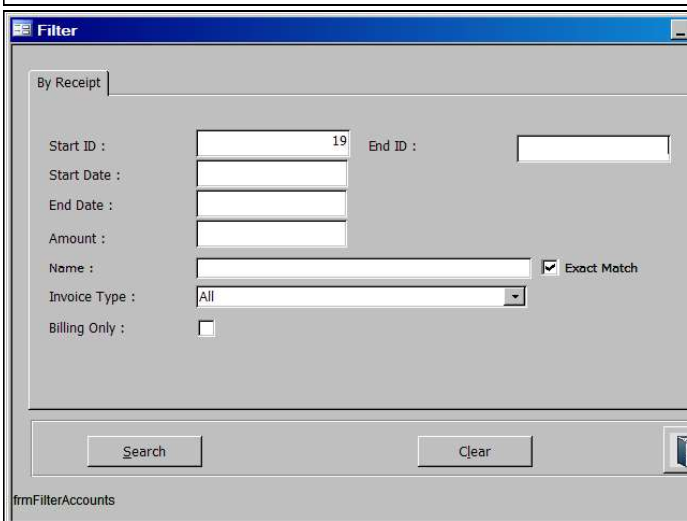
The Receipt can be accessed via a Receipt Search. You can Reprint a Receipt and Void a receipt

There are various reports associated with receipting that are

available on your system

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Part Receipt an Invoice

	<p>Select Finance from the Outlook bar on the left hand side.</p> <p>Select Invoices from the expanded selection.</p> <p>The invoice screen will be displayed.</p>
	<p>To search for the invoice you wish to receipt, tick Account Customers</p> <p>Click on the Search button in the top right hand corner of the screen.</p>
	<p>The search filter screen will open. If the invoice summary number is known, enter the summary number in <i>Start ID</i> box</p> <p>Click on Search</p>

Filter

By Receipt

Start ID : End ID :

Start Date :

End Date :

Amount :

Name : ☒ Exact Match

Invoice Type :

Billing Only : ☐

frmFilterAccounts

Alternatively, enter the name of the Funeral Director or Mason in the *Name* box.
Click on **Search**

Invoices

Clients
Cremation
Diary
Finance
Accounting
Charges
Generate Fees
Invoices
Quick Update
Generate
Interment
Locations
Mapping
Memorial
Output
Preferences
Setup

List of Invoices

Summar	Total	First	Surname
19	5990.25		Tahoe Funeral Services

☐ Account Customers Only
☒ All Account Items

Please Select Process Date
09/12/2010
This date will print all of the items on the invoice that are dated before it

Please Select Invoice Date
09/12/2010
This is the date that is printed on the invoice

frmviewInvoices

The invoice will be displayed in the search results:

Receipt Invoice

Click on the Invoice entry to highlight.
Click on the Receipt Invoice button in the bottom right hand corner of the screen.

Create New Receipt

Funeral Director :

Payee :

23 London Road,

Receipt Date : Type of Payment :

Payment Reference :

Comments :

Organization :

Currency :

Account Code :

Description :

Amount : VAT : Total :

Location :

BACASID :

Receipt Items

Description	Amount	VAT	Total
Cremation - 14/02/2005 (1000) John Mr. John Keller -	350	0	
Burial Fee - 14/12/2004 (0) Albert James Haddrell - Rubican Cem...	350	0	
Burial Fee - 16/12/2004 (0) Brian Campbell - Rubican Cemetery	350	0	
Bearer (Double) - 16/12/2004 (0) Brian Campbell - Rubican Cem...	20	3.5	
Burial Fee - 01/12/2004 (0) Michael Duffell - Rubican Cem...	350	0	

frmReceipt2

The *Create New Receipt* Screen will open. The Funeral Director/Mason details will be displayed at the top of the screen and all the items on the invoice listed at the bottom of the screen.

1. Select the payment type under *Type of Payment*
2. Enter *Payment Reference* details (for example Cheque No) and *Payment Comments* (For example a reference to original invoice) if desired
3. Click on the first item in the list at the bottom of the screen that you do not wish to receipt. It will be

- highlighted
- Click on the **Delete Item** button in the bottom right hand corner of the screen.

Create New Receipt

Funeral Director:

Payee:

23 London Road,

Receipt Date: Type of Payment:

Payment Reference:

Comments:

Organization:

Currency:

Account Code:

Description:

Amount: VAT: Total:

Location:

BACASID:

Receipt Items

Burial Fee - 27/01/2005 (1026 Mrs Peggy Weller - Rubicen Cem...	380	0		
Shovel(s) Fee - 27/01/2005 (1026 Mrs Peggy Weller - Rubicen Ce...	10	1.75		
Cremation - 08/03/2005 (1004) Rupert Mr Rupert Rule -	350	0		
Medical Referee Fee - 08/03/2005 (1004) Rupert Mr Rupert Rule -	16.5	0		

frmReceipt2

The item will be removed from the list

Continue to Select and Delete any other items that you do not wish to receipt until only the items you wish to receipt remain.

Report List

Report Category:

Batch Category:

Reports

☒ Receipt

Report List

Parameters

Start: End:

Invoice:

frmReportList

- Click on the **Printer** Button
- BACAS will display a report list.
- Select Receipt by ticking the box.
- Click on the **Next** button
- On the following screen click on **Print**

Cremation

Deceased: Date: Time:

Funeral Director: Service:

1004

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Invoice 19 Sterling Cremation - 08/03/2005 (1004) Rupert Mr Rupe 350.00
 Invoice 19 Sterling Medical Referee Fee - 08/03/2005 (1004) Rupert 16.50
 Receipt 62 Sterling Cremation - 08/03/2005 (1004) Rupert Mr Rupe 350.00
 Receipt 62 Sterling Medical Referee Fee - 08/03/2005 (1004) Rupert 16.50

Account To

☒ Funeral Director
☐ Applicant

Receipt:

Add

Delete

Receipt

frmCremations

The above process will have produced a record for the numbered receipt. (Even in the case of the receipt failing to print).


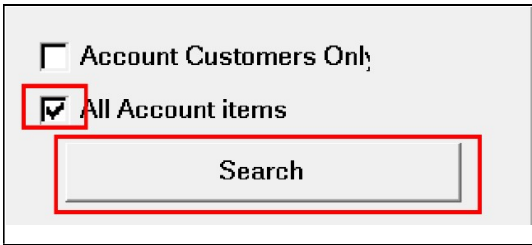
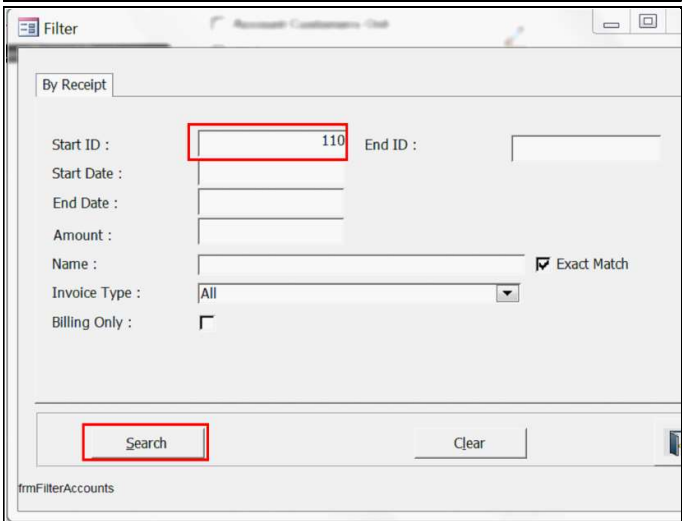
The above process will also update the finance tab of each of each of burials/cremations with invoice details selected from the invoice:

The Receipt can be accessed via a Receipt Search. You can Reprint a Receipt and Void a receipt
 There are various reports associated with receipting that are

available on your system.

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Reinstate an Invoice

	<p>BACAS will allow you to re - instate (mark as unpaid) an invoice that has been cleared in error.</p> <p>Select Finance from the Outlook bar on the left hand side.</p> <p>Select Invoices from the expanded selection.</p> <p>The <i>Invoice</i> screen will be displayed.</p>
	<p>To search for the invoice you wish to clear, tick <i>All Account items</i> in the top right hand corner of the screen</p> <p>Click on the Search button in the top right hand corner of the screen.</p>
	<p>The search <i>Filter</i> screen will open.</p> <ol style="list-style-type: none"> 1. If known, enter the Invoice (Summary) number in <i>Start ID</i> box. 2. Click on Search

Filter

By Receipt

Start ID : End ID :

Start Date : End Date :

Amount :

Name : **Tavistock** ☐ Exact Match

Invoice Type : All

Billing Only : ☐

Search Clear

frmFilterAccounts

1. Alternatively, enter the name of the *Funeral Director or Mason* in the *Name* box
2. Click on **Search**

List of Invoices

Summary Total	First	Surname
0	1199.5	Tavistock And Williams Funeral Services
71	366.5	Tavistock And Williams Funeral Services
82	491.75	Tavistock And Williams Funeral Services
110	1035	Tavistock And Williams Funeral Services

☐ Account Customers Only
☒ All Account items
 Search

Please Select Process Date:
 21/05/2013
 This date will print all of the items on the invoice that are dated before it.

Please Select Invoice Date:
 20/05/2013
 This is the date that is printed on the invoice

Print Outstanding Invoices

Print Selected Invoice

Receipt Invoice

frmViewInvoices

The invoice will be displayed in the search results *List of invoices*.

1. Ensure the Invoice is highlighted (Use Summary ID or amount for guidance)
2. Click on the Edit pencil

Update Invoice

Payee : Tavistock And Williams Funeral Services
 21 Town Square,

Date : * Monday 20/05/13

Organization : * Tahoe Company Ltd

Currency : * Sterling

Account Code : *

Description : *

Amount : * VAT : Calc Gross VAT
 Calc Net VAT

Location : *

Reference : 0

Items



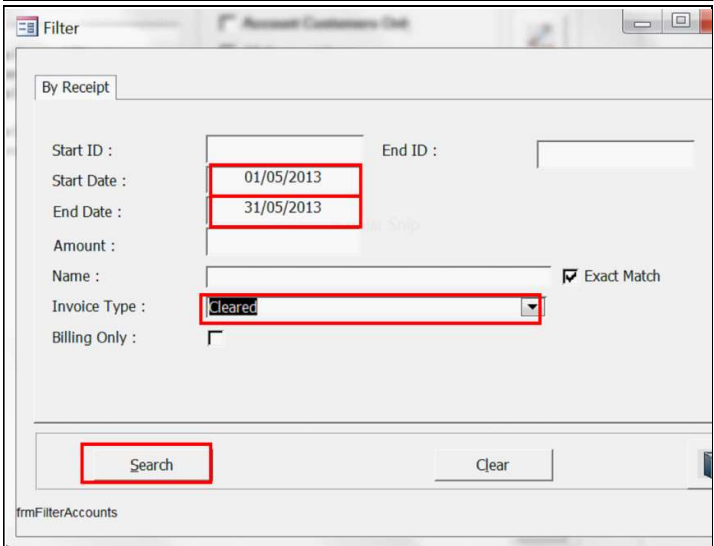
Description	Quantity	Unit Price	Total
Burial of Cremated Remains - 30/04/2013 (1171) Derek Hooper ~	260	0	0
Wooden Cross - 30/04/2013 (1171) Derek Hooper ~	15	0	0
Burial of Cremated Remains - 30/04/2013 (1172) Mr Ian Donaldson ~	260	0	0
Cremation - 30/04/2013 (1109) Mr Ron Pickering ~ Mount Tallac Cren	400	0	0
Orgainst Pay - 30/04/2013 (1109) Mr Ron Pickering ~ Mount Tallac Cr	85.11	14.89	

Alter Location

frmUpdateInvoice

The *Update Invoice* screen will open

1. Click on the Re - Instate Invoice button
2. Click on the Exit button

	<p>BACAS will allow you to search for invoices that have been receipted or cleared.</p> <p>Select Finance from the Outlook bar on the left hand side.</p> <p>Select Invoices from the expanded selection.</p> <p>The invoice screen will be displayed.</p>
	<ol style="list-style-type: none"> 1. Tick All Account Items 2. Click on the Search button in the top right hand corner of the screen.
	<p>The search filter screen will open.</p> <ol style="list-style-type: none"> 1. Enter <i>Start Date</i> and <i>End Date</i> to define a date range for your search. BACAS will search against the actual date that a numbered invoice was processed (not the <i>Process Date</i> entered into BACAS at numbering) For unnumbered invoices BACAS will search against the date that the first item of finance was generated) 2. Select Invoice Type Cleared 3. Click on Search

List of Invoices			
Summar	Total	First	Surname
107	99		Cookson and Smythe Funeral Director
110	1035		Tavistock And Williams Funeral Services

☐ Account Customers Only
☒ All Account items





Please Select Process Date
 21/05/2013
 This date will print all of the items on invoice that are dated before it.

Please Select Invoice Date
 20/05/2013
 This is the date that is printed on the

All Cleared invoices for this date range will be displayed in the search results:

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Search for Outstanding (Unpaid) Invoice

<div style="border: 1px solid black; padding: 5px;"> Clients Cremation Diary Finance  Accounting  Charges  Generate Fees  Invoices </div>	<p>Select Finance from the Outlook bar on the left hand side.</p> <p>Select Invoices from the expanded selection.</p> <p>The invoice screen will be displayed.</p>
<div style="border: 1px solid black; padding: 10px;"> <input type="checkbox"/> Account Customers Only <input checked="" type="checkbox"/> All Account items <div style="border: 2px solid red; padding: 5px; display: inline-block; margin-top: 10px;"> <input type="button" value="Search"/> </div> </div>	<p>Tick All Account Items</p> <p>Click on the Search button in the top right hand corner of the screen.</p>



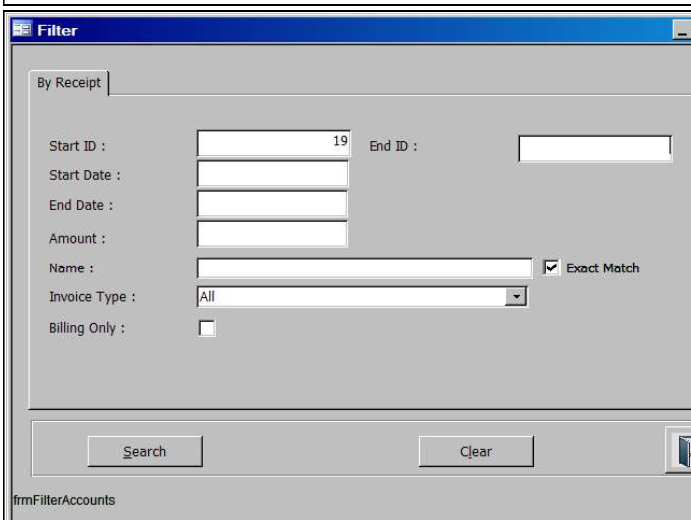
frmFilterAccounts

The search filter screen will open.

1. Enter *Start Date* and *End Date* to define a date range for your search. BACAS will search against the actual date that a numbered invoice was processed (not the *Process Date* entered into BACAS at numbering) For unnumbered invoices BACAS will search against the date that the first item of finance was generated)
2. Select *Invoice Type* **Outstanding**
3. Click on **Search**

frmViewInvoices

All unpaid invoices for this date range will be displayed in the search results:

	<p>Select Finance from the Outlook bar on the left hand side.</p> <p>Select Invoices from the expanded selection.</p> <p>The invoice screen will be displayed.</p>
	<p>To search for the invoice you wish to receipt, tick <i>Account Customers Only</i> and then click on the Search button in the top right hand corner of the screen.</p>
	<p>The search filter screen will open.</p> <p>If the invoice summary number is known, enter the summary number in <i>Start ID</i> box and click on Search</p>

Filter

By Receipt

Start ID : End ID :

Start Date :

End Date :

Amount :

Name : ☒ Exact Match

Invoice Type :

Billing Only : ☐

frmFilterAccounts

Alternatively, enter the name of the Funeral Director or Mason in the *Name* box and click on **Search**

Invoices

Clients
Cremation
Diary
Finance

Accounting
Charges
Generate Fees
Invoices
Quick Update
Generate
Interment
Locations
Mapping
Memorial
Output
Preferences
Setup

List of Invoices

Summary	Total	First	Surname
19	6990.25		Tahoe Funeral Services

frmViewInvoices

☐ Account Customers Only
☒ All Account Items

Please Select Process Date
09/12/2010
This date will print all of the items on the invoice that are dated before it

Please Select Invoice Date
09/12/2010
This is the date that is printed on the invoice

The invoice will be displayed in the search results:

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Search for an unprocessed invoice (Summary id 0)

Clients
Cremation
Diary
Finance

Accounting
Charges
Generate Fees
Invoices

Select **Finance** from the Outlook bar on the left hand side.


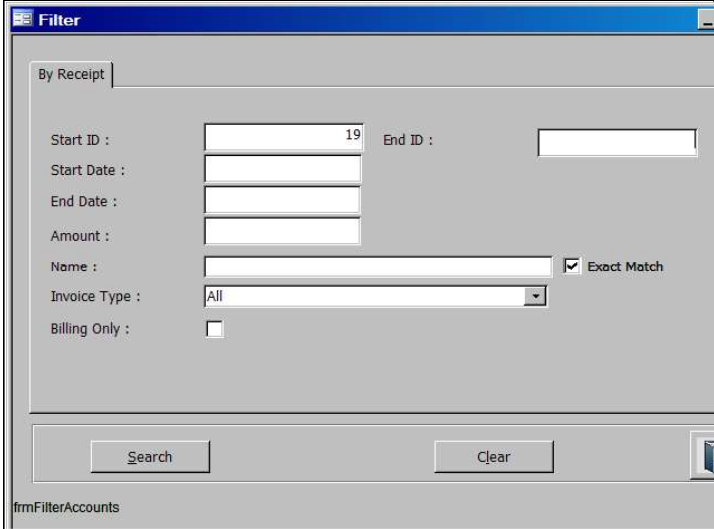
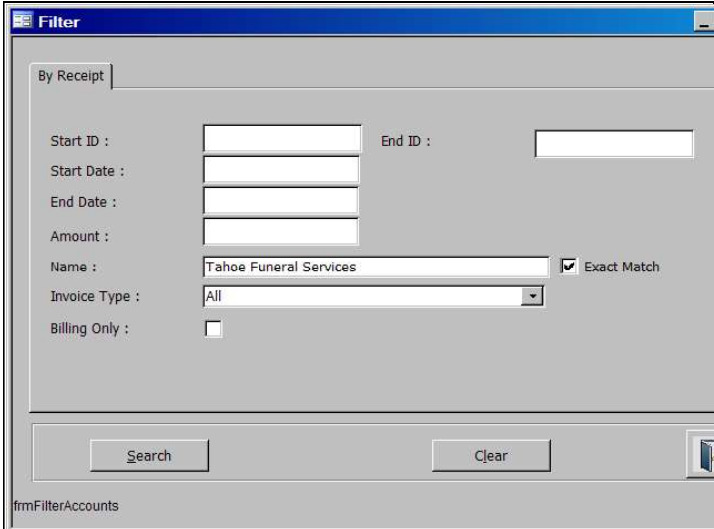
Select **Invoices** from the expanded selection.

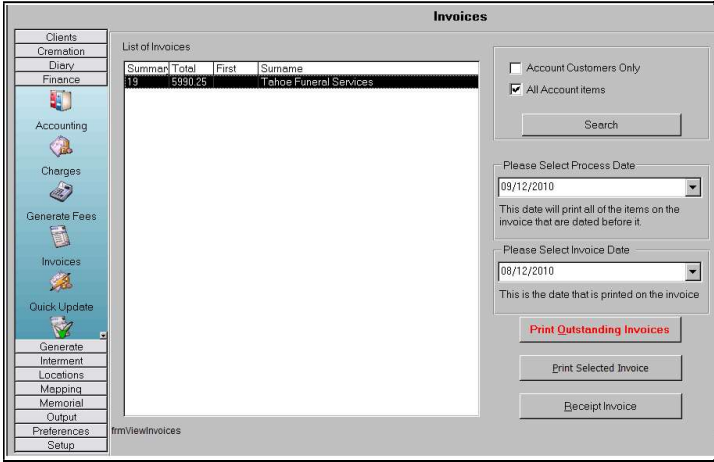
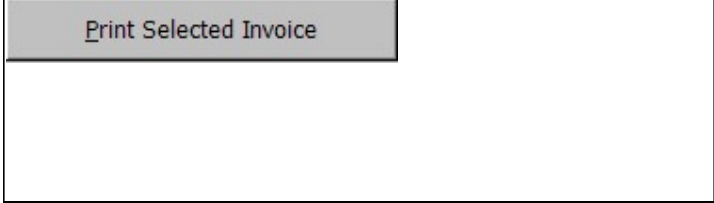
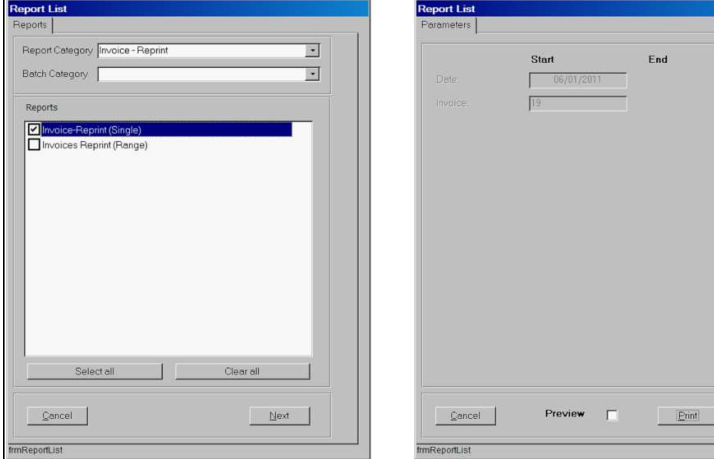
<div> <input checked="" type="checkbox"/> Account Customers Only <input type="checkbox"/> All Account items <div>Search</div> </div>	<p>The invoice screen will be displayed.</p> <p>To search for the invoice you wish to receipt, tick <i>Account Customers Only</i> and then click on the Search button in the top right hand corner of the screen.</p>
<div> <div>Filter</div> <div>By Receipt</div> <div> <div>Start ID :</div> <div>19</div> <div>End ID :</div> <div></div> </div> <div> <div>Start Date :</div> <div></div> </div> <div> <div>End Date :</div> <div></div> </div> <div> <div>Amount :</div> <div></div> </div> <div> <div>Name :</div> <div></div> <div><input checked="" type="checkbox"/> Exact Match</div> </div> <div> <div>Invoice Type :</div> <div>All</div> </div> <div> <div>Billing Only :</div> <div><input type="checkbox"/></div> </div> <div> <div>Search</div> <div>Clear</div> </div> <div>frmFilterAccounts</div> </div>	<ol style="list-style-type: none"> 1. Enter 0 the summary number in <i>Start ID</i> box and click on Search 2. Enter the name of the Funeral Director or Mason in the <i>Name</i> box and click on Search 3. The invoice will be displayed in the search results:

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Reprint a single Invoice


<div> <div> <div>Clients</div> <div>Cremation</div> <div>Diary</div> <div>Finance</div> </div> <div> <div>Accounting</div> <div>Charges</div> <div>Generate Fees</div> <div>Invoices</div> </div> </div>	<p>The following procedure applies to <u>invoices that have been numbered only</u></p> <p>Select Finance from the Outlook bar on the left hand side.</p> <p>Select Invoices from the expanded selection.</p> <p>The invoice screen will be displayed.</p>
--	--

	<p>To search for the invoice you wish to receipt, tick <i>Account Customers Only</i> and then click on the Search button in the top right hand corner of the screen.</p>
	<p>The search filter screen will open.</p> <p>If the invoice summary number is known, enter the summary number in <i>Start ID</i> box and click on Search</p>
	<p>Alternatively, enter the name of the Funeral Director or Mason in the <i>Name</i> box and click on Search</p>

	<p>The invoice will be displayed in the search results:</p>
	<p>Click on the Invoice entry to highlight. Click on the Print Selected Invoice Button in the bottom right hand corner of the screen.</p>
	<p>BACAS will display a report list.</p> <ol style="list-style-type: none"> 1. Select Invoice Reprint (Single) by ticking the box. 2. Click on the Next button 3. On the following screen click on Print <p>The selected invoice will be reprinted</p>

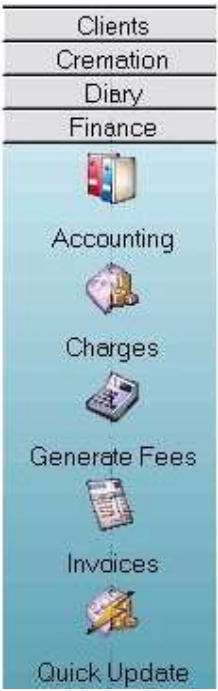
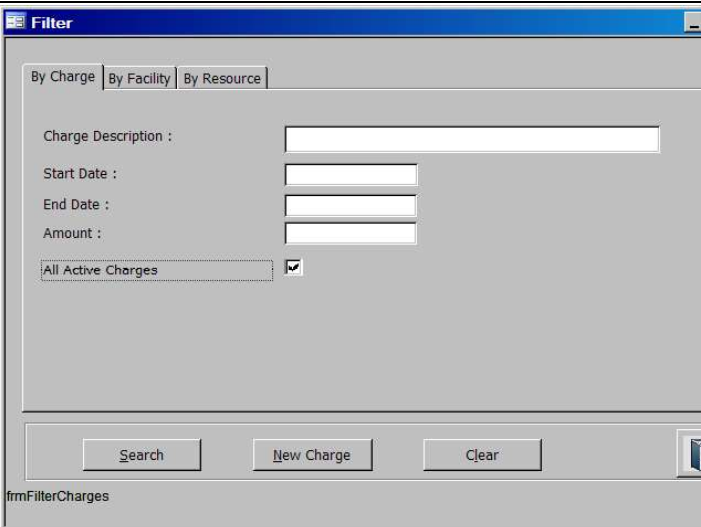
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Quick Update

	<p>Quick Update</p> <ul style="list-style-type: none"> • Set up changes to charges
---	--

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Set up changes to charges

	<p>Changes to charges can either be carried out in advance of when the new prices are to come into effect; on the day that the new prices come into effect; or after the day the new prices come into effect. It is recommended that you start by printing a Account Charges Filtered report. This will give you a list of all the current charges as they are set up before you begin and it can be used as a tick list as you update each new fee in BACASNG</p> <p>Select Finance from the Outlook bar on the left hand side.</p> <p>Select Quick Update from the expanded selection.</p> <p>A <i>Filter</i> window will be displayed.</p>
	<p>Tick All Active Charges and then click on Search</p>

Quick Charge Update

Description	Start Date	End Date	Amount
Cremation	01/01/2009	31/12/9999	500
Cremation	01/01/2006	31/12/9999	400
Cremation	01/01/2005	31/12/9999	350
Cremation	01/01/2005	31/12/9999	150
Exclusive Right of Burial	01/01/1980	31/12/9999	1200
Granite Plaque	01/04/2008	31/12/9999	129.25
Medical Referee Fee	01/01/2007	31/12/9999	18
Medical Referee Fee	01/01/2004	31/12/9999	16.5
Organist Pay	01/04/2006	31/12/9999	100
Permit Fee	01/01/2004	31/12/9999	82.25
Shovel(s) Fee	01/01/2007	31/12/9999	17.62
Vellum Plaque	01/01/2009	31/12/9999	164.5

Start Date: 30/04/2010

Description: Cremation

Age: 15 Years to 999 Years Time: 15.30 to 23.59

Resident: ☐ Body Part: ☐ Grave: ☐

Amount: 510 Tax 1: 0 Tax 2: 0

Renewal 1: 0 Tax 1: 0 Tax 2: 0

Renewal 2: 0 Tax 1: 0 Tax 2: 0

Calc Gross Tax

Calc Net Tax

The *Quick Charge Update* Screen will open. All current charges will be listed in the same order as the Account Charges Filtered report. The first charge on the list will be highlighted.

Do not attempt to make any changes to the charge by clicking on the finger and using the edit charge screen

1. Enter date you wish the new price to come into effect in the *Start Date* field
2. Enter the new charge amount and VAT in the *Amount* and *Tax* fields
3. Click on **Save**

BACAS

Do you wish to save your changes?

Yes No Cancel

You will be asked to confirm the change. Click on **Yes**


If the new charge comes into effect at a future date, the old charge will now have the End Date (date in second column) set to the day before the new charge comes into effect. The new charge will not appear on the screen at this stage as it is not 'live'. It is a good idea to tick the entry on the Charge Report to show that the new charge has been created. NB If the new charge came into effect before today's date the new charge will appear with an end date of 31/12/999

The selection bar will have moved down to the next charge ready for amendment.

1. Carry out the next amendment as above (you will notice that the Start Date that you entered before has remained the same).
2. Carry on working down the list until all the changes are completed.

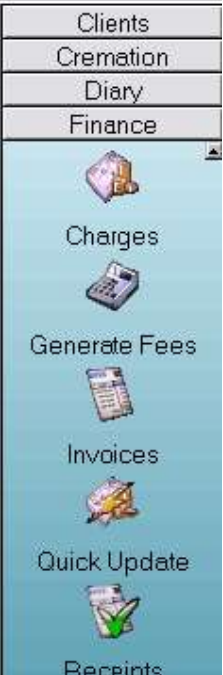
Created with the Standard Edition of HelpNDoc: [Full-featured Kindle eBooks generator](#)

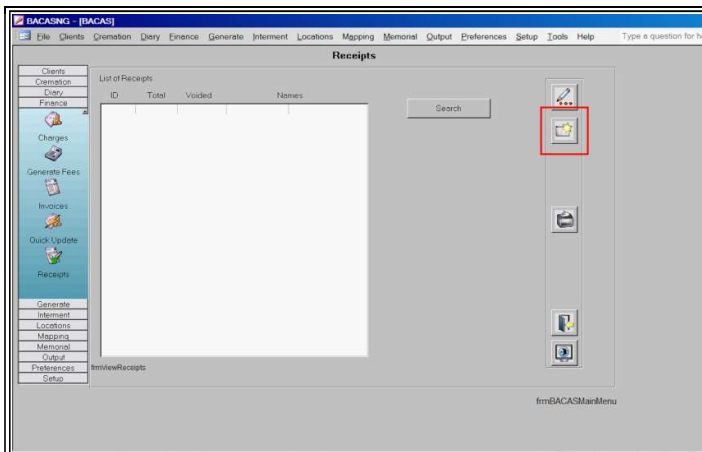
Receipts

 <p>Receipts</p>	<p>Receipts</p> <ul style="list-style-type: none"> • Create a manual receipt • Search for a receipt • Update a receipt • Void a receipt • Reprint a receipt
---	---

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Create a manual receipt

	<p>Select Finance from the <i>Outlook bar</i> on the left hand side.</p> <p>Select Receipt from the expanded selection.</p> <p>The <i>Receipts</i> screen will be displayed.</p>
---	--



1. Click on the **New** button

The *Create New Receipt* window will be displayed.

Either Select a Funeral Director from the drop down selection on the *Funeral Director* box or click on the **Select Payee** button

Search for : Clients

General

Filter Criteria :

Role:

Forename:

Surname:

Address:

Postcode:

Search **New** **Clear**

The *Search for: Clients* window will be displayed allowing you to complete Payee details:
Either select an existing client:

1. Select the client role from the *Role* field
2. Enter the Client Surname in the *Surname*
3. field
4. Click on **Search**

Memorial Applicant Information

Client is dead ☐ Memorial Applicant Information BACAS ID: 2970

Petricia	Breen
Petricia	Breen

General Other Info Billing Previous Addresses

☐ Frequently Used ☐ Seldom Used ☐ Never Used

Title:

Forenames:

Surname:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

Address Line 5:

Address Line 6:

Post Code:

Telephone 1:

Mobile:

frmClientsE

1. The Client Information Screen will open
2. Click on the client to highlight
3. Click on the **Selection Finger**

Search for : Clients

General

Filter Criteria :

Role Payee

Forename ☐ Exact Match!

Surname ☐ Exact Match!

Address

Postcode

frmEnquiry

Alternatively create a new client:
Click on the **New** Button

Payee Information

Client is dead ☐ Payee Information BACAS ID:

General Other Info Billing Previous Addresses

☒ Frequently Used ☐ Seldom Used ☐ Never Used

Title Mrs

Forenames: Petricia

Surname: Green

Address Line 1: 21 Honeysuckle Crescent

Address Line 2: Tahoe

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code:

Telephone 1:

Mobile:

frmClientsE

1. The Payee Information window will display
2. Enter Name and Address details for the new payee
3. Click on **Save**
4. Click on the **Selection Finger**

Create New Receipt

Funeral Director:

Payee: Petricia Breen
21 Honeysuckle Crescent,

Receipt Date: Thu 16/12/10 Type of Payment: Cheque

Payment Reference: Cheque No: 001839

Comments:

Organization: Tahoe Bereavement Services

Currency: Sterling

Account Code:

Description:

Amount: VAT: Total:

Location:

BACASID: 41

Receipt Items

frmReceipt2

You will be returned to the create new receipt window with the payee details completed

6. Select the payment type under *Type of Payment*
7. Enter *Payment Reference* details (for example Cheque No) and *Payment Comments* if desired

The receipt detail can be selected if charge information for the memorial is set up in BACASNG. Click on **Select Item**

The *Select Miscellaneous Item* Screen will open

6. Select the appropriate *Group* from the drop down list
7. Highlight the appropriate resource in the list.
8. Click on the **Selection** Finger
9. Click on the **Exit** button

The *Create New Receipt* window will now display with a description and amount for the selected resource in the centre section of the screen

Click on the **Add Item** button in the bottom right hand corner of the window

The resource and amount will add to the *Receipt Items* list at the bottom of the window

Create New Receipt

Funeral Director :

Payee : Petricia Breen
21 Honesuckle Crescent,

Receipt Date : * Thu 16/12/10 Type of Payment : * Cheque

Payment Reference : Cheque No :001839

Comments : Payment for Plaque and Motif

Organization : * Tahoe Bereavement Services

Currency : * Sterling

Account Code : M010

Description : * Additional Motif

Amount : * 18.72 VAT : 3.28 Total : 22

Location :

BACASID : 41

Receipt Items			
Vellum Plaque	130	22	

frmReceipt2

Details can also be added manually, (for example a motif for plaque)

1. Remove the existing description from the *Description* box and type in the new description
2. Remove the existing amount from the *Amount* box and type in the new amount
3. Click on **Add Item**

Create New Receipt

Funeral Director :

Payee : Petricia Breen
21 Honesuckle Crescent,

Receipt Date : * Thu 16/12/10 Type of Payment : * Cheque

Payment Reference : Cheque No :001839

Comments : Payment for Plaque and Motif

Organization : * Tahoe Bereavement Services

Currency : * Sterling

Account Code : M010

Description : * Additional Motif

Amount : * 18.72 VAT : 3.28 Total : 22

Location :

BACASID : 41

Receipt Items			
Vellum Plaque	130	22	
Additional Motif	18.72	3.28	

frmReceipt2

The additional item will added to the *Receipt Items* list at the bottom of the screen

When all items required have been added to *Receipt Items* click on the **Printer** button

Report List

Report Category : Receipt

Batch Category :

Reports

☒ Receipt

frmReportList

Report List

Parameters

Start : End :

Invoice :

frmReportList

BACAS will display a *Report List*.

1. Select **Receipt** by ticking the box.
2. Click on the **Next** button
3. On the following screen click on **Print**


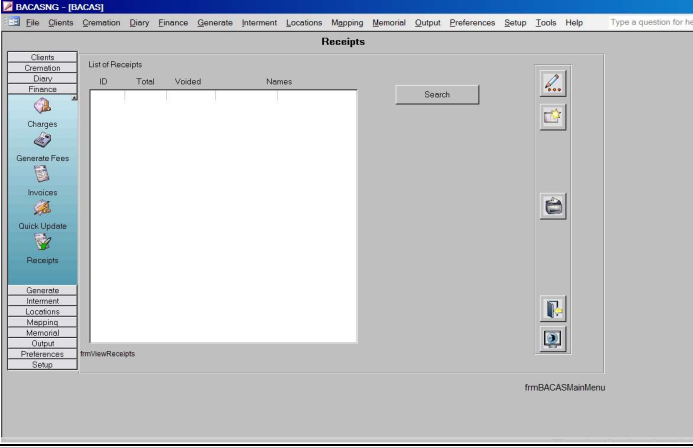
The receipt will print and the above process will have produced a record for the numbered receipt. (Even in the case of the receipt failing to print).

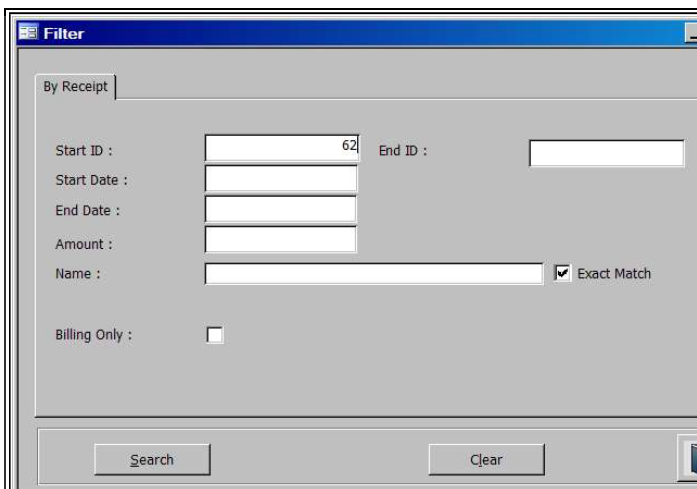
The Receipt can be accessed via a Receipt Search. You can Reprint a Receipt and Void a

	<p>receipt</p> <p>There are various reports associated with receipting that are available on your system</p>
--	--

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Reprint a receipt

	<p>Select Finance from the <i>Outlook bar</i> on the left hand side.</p> <p>Select Receipt from the expanded selection.</p> <p>The <i>Receipts</i> screen will be displayed.</p>
	<p>Click on the Search button</p>

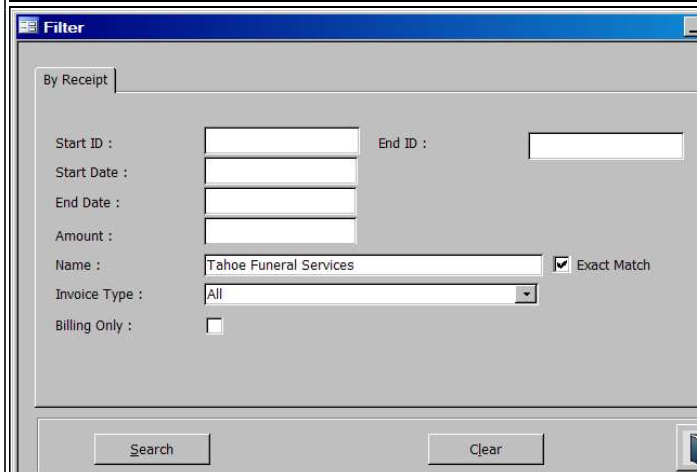


The **Filter** window is shown with the **By Receipt** tab selected. It contains the following fields:

- Start ID :** 62
- End ID :** (empty)
- Start Date :** (empty)
- End Date :** (empty)
- Amount :** (empty)
- Name :** (empty)
- ☒ **Exact Match**
- Billing Only :** ☐

Buttons at the bottom: **Search** and **Clear**.

The *Filter* window will be displayed.
If the Receipt number is known, enter the summary number in *Start ID* box.
click on **Search**

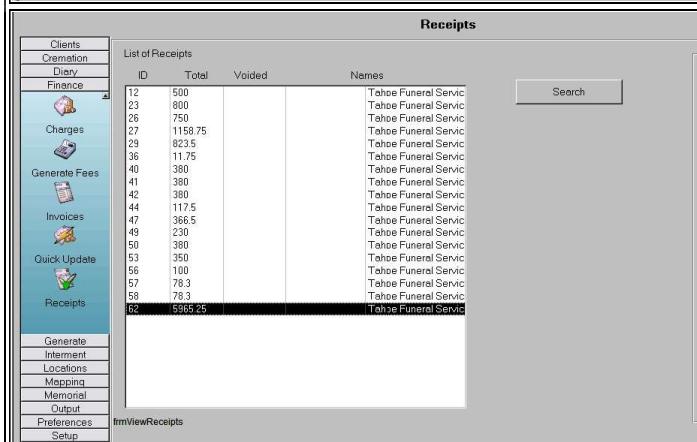


The **Filter** window is shown with the **By Receipt** tab selected. It contains the following fields:

- Start ID :** (empty)
- End ID :** (empty)
- Start Date :** (empty)
- End Date :** (empty)
- Amount :** (empty)
- Name :** Tahoe Funeral Services
- ☒ **Exact Match**
- Invoice Type :** All
- Billing Only :** ☐

Buttons at the bottom: **Search** and **Clear**.

Alternatively, enter the name of the Funeral Director or Mason in the *Name* box.
Click on **Search**



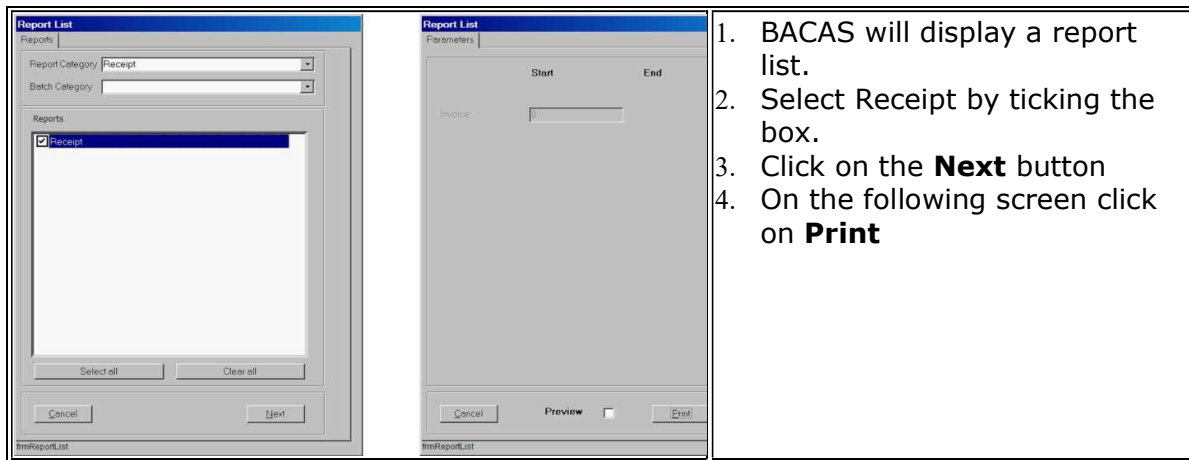
The **Receipts** window is shown. It features a sidebar with navigation options: Clients, Cremation, Diary, Finance, Charges, Generate Fees, Invoices, Quick Update, Receipts, Generate, Interment, Locations, Mapping, Memorial, Output, Preferences, and Setup. The **Receipts** option is selected.

The main area displays a **List of Receipts** table:

ID	Total	Voided	Names
12	500		Tahoe Funeral Service
23	800		Tahoe Funeral Service
26	750		Tahoe Funeral Service
27	1159.25		Tahoe Funeral Service
29	823.5		Tahoe Funeral Service
36	11.75		Tahoe Funeral Service
40	380		Tahoe Funeral Service
41	380		Tahoe Funeral Service
42	380		Tahoe Funeral Service
44	117.5		Tahoe Funeral Service
47	366.5		Tahoe Funeral Service
49	230		Tahoe Funeral Service
50	380		Tahoe Funeral Service
53	350		Tahoe Funeral Service
56	100		Tahoe Funeral Service
57	78.3		Tahoe Funeral Service
58	78.3		Tahoe Funeral Service
62	5005.25		Tahoe Funeral Service

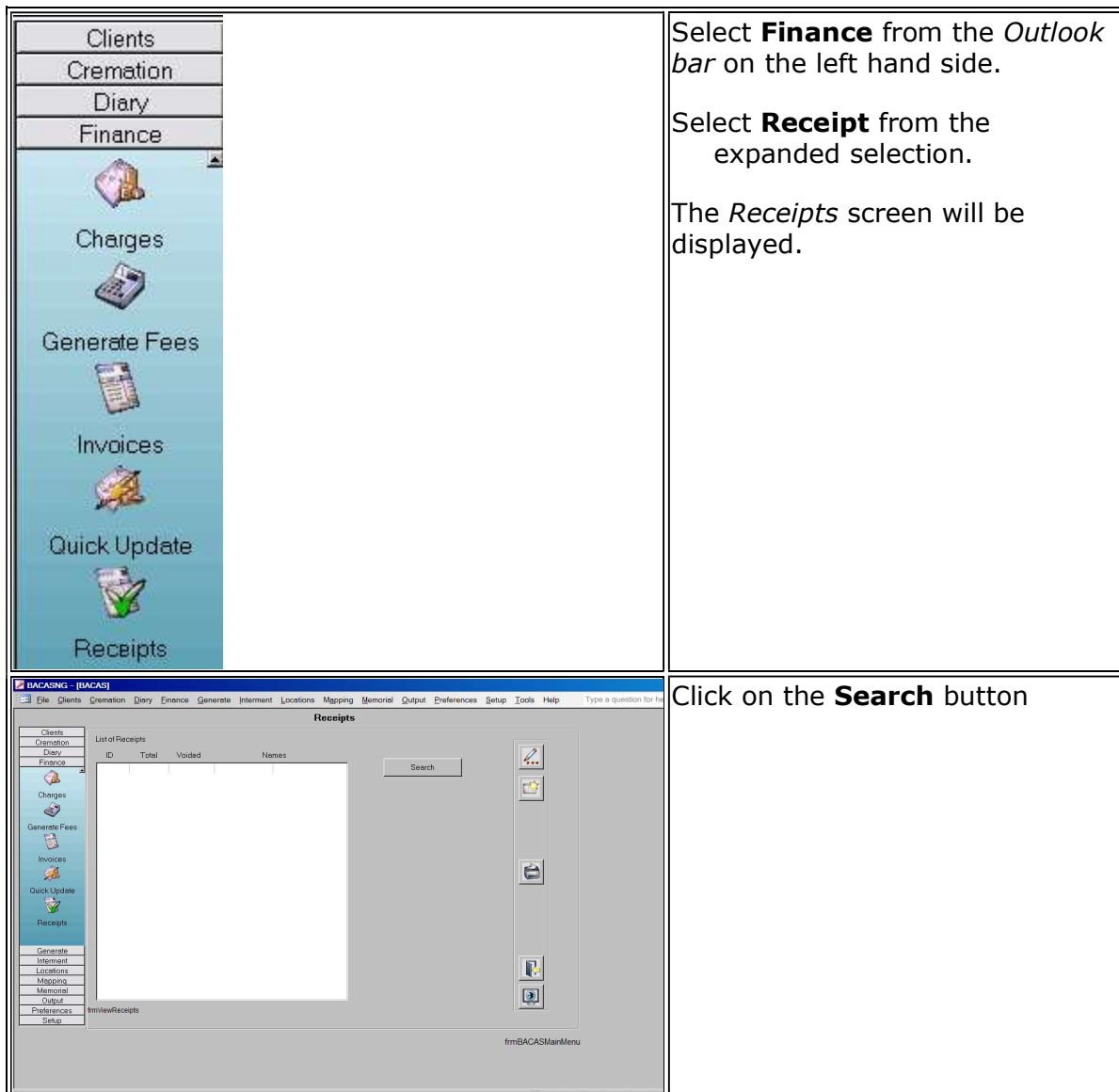
Buttons: **Search** and **PrintViewReceipts**.

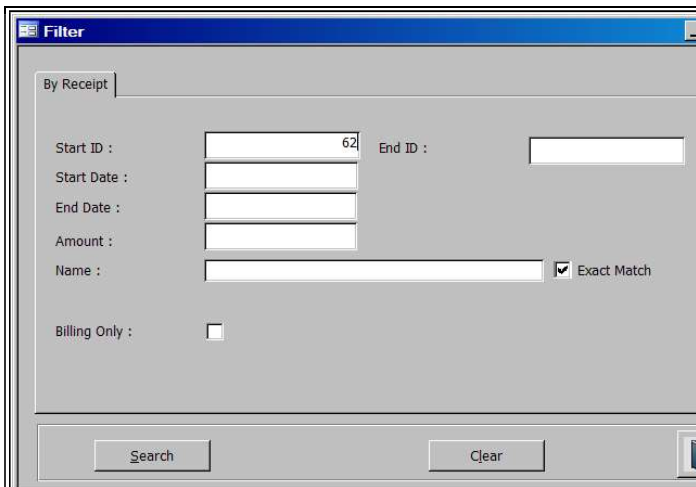
An entry for the receipt will be displayed on the search results.
Click on the entry to select it and then on the **Printer button**.



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Search for a receipt



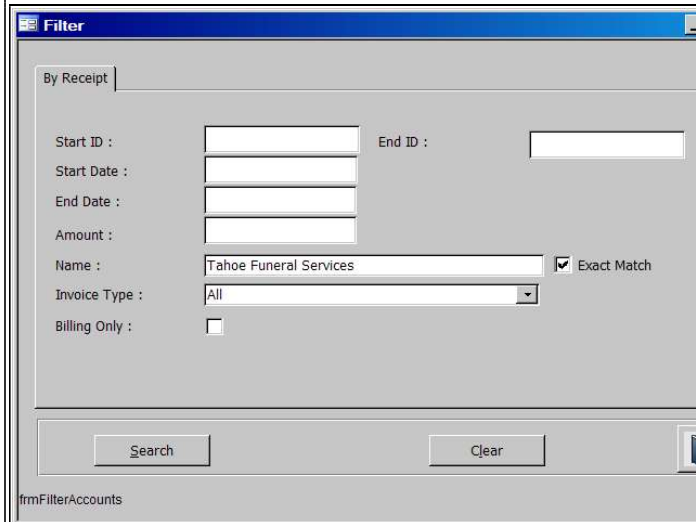


The **Filter** window is shown with the **By Receipt** tab selected. It contains the following fields:

- Start ID :** 62
- End ID :**
- Start Date :**
- End Date :**
- Amount :**
- Name :**
- ☒ **Exact Match**
- Billing Only :** ☐

Buttons at the bottom: **Search** and **Clear**.

The *Filter* window will be displayed.
If the Receipt number is known, enter the summary number in *Start ID* box.
click on **Search**

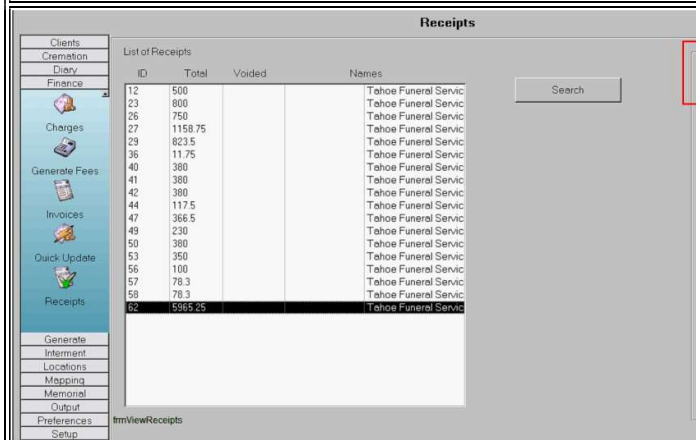


The **Filter** window is shown with the **By Receipt** tab selected. It contains the following fields:

- Start ID :**
- End ID :**
- Start Date :**
- End Date :**
- Amount :**
- Name :** Tahoe Funeral Services
- ☒ **Exact Match**
- Invoice Type :** All
- Billing Only :** ☐

Buttons at the bottom: **Search** and **Clear**.

Alternatively, enter the name of the Funeral Director or Mason in the *Name* box.
Click on **Search**



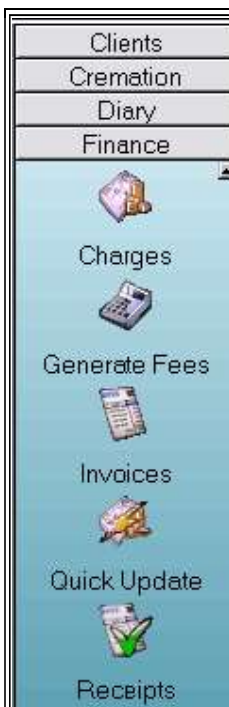
The **Receipts** window is shown. It features a sidebar with navigation options: Clients, Cremation, Diary, Finance, Charges, Generate Fees, Invoices, Quick Update, Receipts, Generate, Interment, Locations, Mapping, Memorial, Output, Preferences, and Setup. The main area displays a table of receipts.

ID	Total	Voided	Names
12	500		Tahoe Funeral Service
23	800		Tahoe Funeral Service
25	750		Tahoe Funeral Service
27	1158.75		Tahoe Funeral Service
29	823.5		Tahoe Funeral Service
36	11.75		Tahoe Funeral Service
40	380		Tahoe Funeral Service
41	380		Tahoe Funeral Service
42	380		Tahoe Funeral Service
44	117.5		Tahoe Funeral Service
47	366.5		Tahoe Funeral Service
49	230		Tahoe Funeral Service
50	380		Tahoe Funeral Service
53	350		Tahoe Funeral Service
56	100		Tahoe Funeral Service
57	78.3		Tahoe Funeral Service
58	78.3		Tahoe Funeral Service
62	1585.25		Tahoe Funeral Service

Buttons: **Search** and **Clear**.

An entry for the receipt will be displayed on the search results.

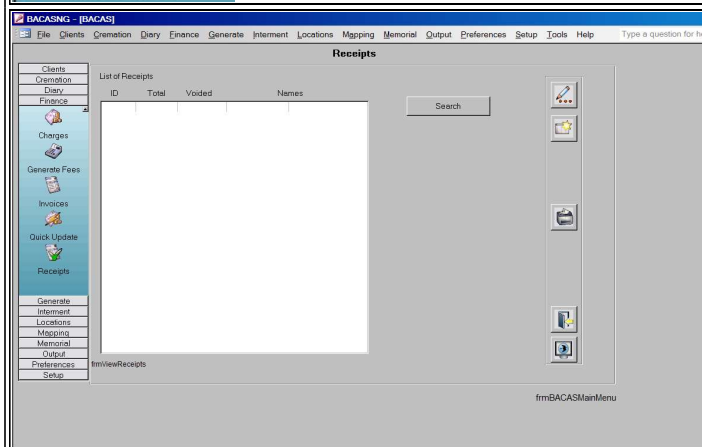
1. Click on the entry to select it and then on the **Edit Pencil** to view the detail of the receipt



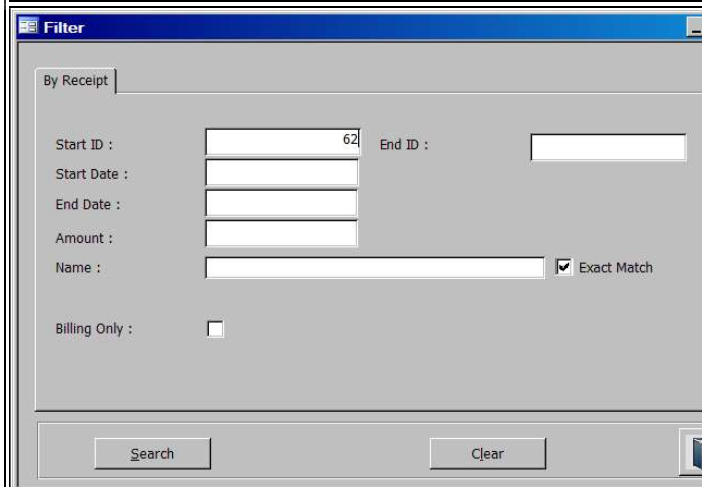
Select **Finance** from the *Outlook bar* on the left hand side.

Select **Receipt** from the expanded selection.

The *Receipts* screen will be displayed.



Click on the **Search** button



The *Filter* window will be displayed.

If the Receipt number is known, enter the summary number in *Start ID* box.
click on **Search**

Filter

By Receipt

Start ID : End ID :

Start Date :

End Date :

Amount :

Name : ☒ Exact Match

Invoice Type :

Billing Only : ☐

Alternatively, enter the name of the Funeral Director or Mason in the *Name* box.
Click on **Search**

Receipts

Client: Cremation: Diary: Finance:

Charges: Generate Fees: Invoices: Quick Update: Receipts:

Generate: Interment: Locations: Mapping: Memorial: Output: Preferences: Setup:

List of Receipts

ID	Total	Voided	Names
12	500		Tahoe Funeral Serv
23	800		Tahoe Funeral Serv
26	750		Tahoe Funeral Serv
27	1158.75		Tahoe Funeral Serv
29	823.5		Tahoe Funeral Serv
36	11.75		Tahoe Funeral Serv
40	380		Tahoe Funeral Serv
41	380		Tahoe Funeral Serv
42	380		Tahoe Funeral Serv
44	117.5		Tahoe Funeral Serv
47	366.5		Tahoe Funeral Serv
49	230		Tahoe Funeral Serv
50	380		Tahoe Funeral Serv
53	350		Tahoe Funeral Serv
56	100		Tahoe Funeral Serv
57	78.3		Tahoe Funeral Serv
58	78.3		Tahoe Funeral Serv
62	5965.25		Tahoe Funeral Serv

frmViewReceipts

An entry for the receipt will be displayed on the search results.
Click on the entry to select it and then on the **Edit Pencil**

Update Receipt

Company:

Receipt Reference:

Receipt Date:

Payment:

Receipt Total:

Date Banked:

Date Cleared:

Payment Reference:

Comments:

Void Date:

Void Comments:

Items


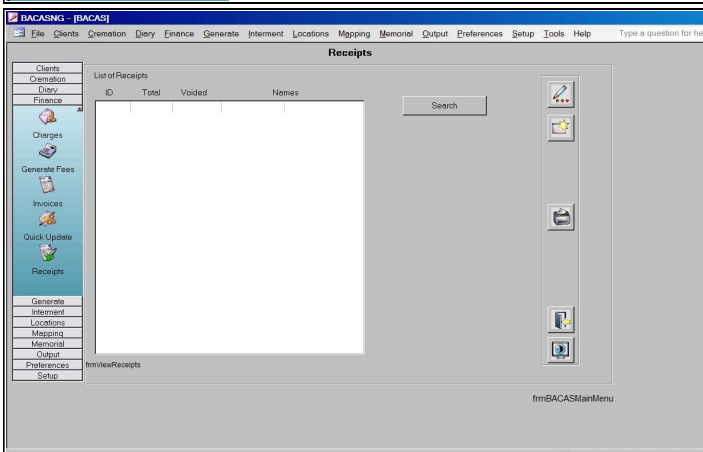
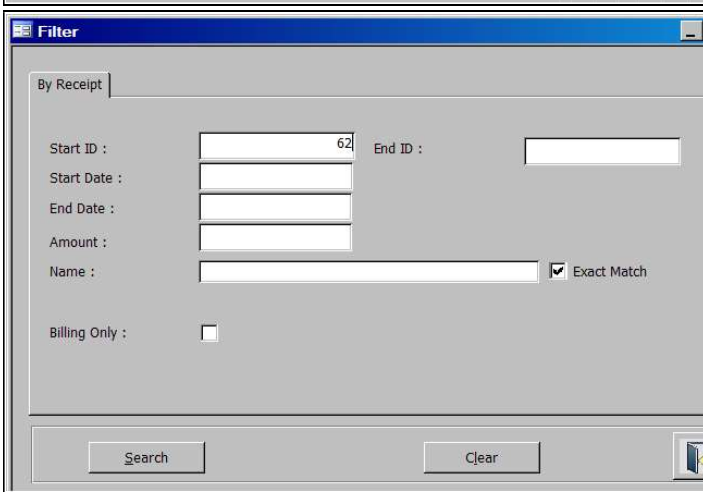
Item	Description	Amount	Unit
C001	Cremation - 14/02/2005 (1000) John Mr John Kellar -	350	0
B001	Burial Fee - 14/12/2004 (0) Albert James Haddrell - Rubican Cemetery	350	0
B001	Burial Fee - 16/12/2004 (0) Brian Campbell - Rubican Cemetery	350	0
M002	Bearer (Double) - 16/12/2004 (0) Brian Campbell - Rubican Cemetery	20	3.5
B001	Burial Fee - 21/12/2004 (0) Michael Bidwell Dodson - Rubican Cemetery	350	0
B001	Burial Fee - 05/01/2005 (0) John Ernest Armstrong - Rubican Cemetery	430	0

frmUpdateReceipt

The Update receipt window will be displayed showing the receipt number, the date of the receipt, the payment type, payment reference and amount of the receipt

You can:

1. Amend/Enter the date the payment was banked in the *Date Banked* Field
2. Amend/Enter date the payment was cleared in the *Date Cleared* field
3. Amend/Enter the Payment Reference in the *Payment Reference* field
4. Amend /Enter the Comments in the *Comments* field
5. Click on the **Save** button to save your changes

	<p>Select Finance from the <i>Outlook bar</i> on the left hand side.</p> <p>Select Receipt from the expanded selection.</p> <p>The <i>Receipts</i> screen will be displayed.</p>
	<p>Click on the Search button</p>
	<p>The <i>Filter</i> window will be displayed.</p> <p>If the Receipt number is known, enter the summary number in <i>Start ID</i> box. click on Search</p>

Filter

By Receipt

Start ID : End ID :

Start Date :

End Date :

Amount :

Name : ☒ Exact Match

Invoice Type :

Billing Only : ☐

Alternatively, enter the name of the Funeral Director or Mason in the *Name* box.
Click on **Search**

Receipts

Clients
Cremation
Clergy
Finance
Charges
Generate Fees
Invoices
Quick Update
Receipts
Generate
Interment
Locations
Mapping
Memorial
Output
Preferences
Setup

List of Receipts

ID	Total	Voided	Names
12	500		Tahoe Funeral Servic
23	800		Tahoe Funeral Servic
26	750		Tahoe Funeral Servic
27	1158.75		Tahoe Funeral Servic
29	823.5		Tahoe Funeral Servic
36	11.75		Tahoe Funeral Servic
40	380		Tahoe Funeral Servic
41	380		Tahoe Funeral Servic
42	380		Tahoe Funeral Servic
44	117.5		Tahoe Funeral Servic
47	366.5		Tahoe Funeral Servic
49	230		Tahoe Funeral Servic
50	380		Tahoe Funeral Servic
53	350		Tahoe Funeral Servic
56	100		Tahoe Funeral Servic
57	78.3		Tahoe Funeral Servic
58	78.3		Tahoe Funeral Servic
62	595.25		Tahoe Funeral Servic

frmViewReceipts

An entry for the receipt will be displayed on the search results.
Click on the entry to select it and then on the **Edit Pencil**

Update Receipt

Company:

Receipt Reference:

Receipt Date:

Payment:

Receipt Total:

Date Banked:

Date Cleared:

Payment Reference:

Comments:

Void Date:

Void Comments:

Items

Item	Description	Amount	Unit
C001	Cremation - 14/02/2005 (1000) John Mr John Kellar -	350	0
B001	Burial Fee - 14/12/2004 (0) Albert James Haddrell - Rubican Cemetery	350	0
B001	Burial Fee - 16/12/2004 (0) Brian Campbell - Rubican Cemetery	350	0
M002	Bearer (Double) - 16/12/2004 (0) Brian Campbell - Rubican Cemetery	20	3.5
B001	Burial Fee - 21/12/2004 (0) Michael Bidwell Dodson - Rubican Cemetery	350	0
B001	Burial Fee - 05/01/2005 (0) John Ernest Armstrong - Rubican Cemetery	430	0

frmUpdateReceipt

The Update receipt window will be displayed showing the receipt number, the date of the receipt, the payment type, payment reference and amount of the receipt. If the cheque has been banked and/or cleared and BACASNG has been updated, this information will also be displayed.

Update Receipt

Company: Tahoe Bereavement Services
 Receipt Reference: 62
 Receipt Date: 20/12/2010
 Payment: Cheque
 Receipt Total: £5,965.25

Date Banked: 05/01/2005
 Date Cleared:
 Payment Reference: Cheque No 001862
 Comments: Ref Summary 19

Void Date: 23/01/2005 **Void Receipt**
 Void Comments: Funeral Director will bring in new cheque

Items

Item	Description	Quantity	Unit Price	Total
C001	Cremation - 14/02/2005 (1000) John Mr John Kellar -	350	0	
B001	Burial Fee - 14/12/2004 (0) Albert James Haddrell - Rubican Cemetery	350	0	
B001	Burial Fee - 16/12/2004 (0) Brian Campbell - Rubican Cemetery	350	0	
M002	Bearer (Double) - 16/12/2004 (0) Brian Campbell - Rubican Cemetery	20	3.5	
B001	Burial Fee - 21/12/2004 (0) Michael Bidwell Dodson - Rubican Cemetery	350	0	
B001	Burial Fee - 05/01/2005 (0) John Ernest Armstrong - Rubican Cemetery	430	0	

frmUpdateReceipt

1. Enter the date of voiding the receipt in the *Void Date* field
2. Enter comments associated with voiding the receipt in the *Void Comments* field
3. Click on Void Receipt

Report List

Report Category: Receipt
 Batch Category:
☒ Receipt

Select all Clear all

Cancel Next

frmReportList

Report List

Parameters

Start End

Invoice

Cancel Preview Print

frmReportList

To print a copy of the receipt showing that it has been voided, click on the printer button

BACAS will display a *Report List*. Select **Receipt** by ticking the box.

Click on the **Next** button

On the following screen click on **Print**

Receipts

Client: Cremation
 Diary
 Finance
 Charges
 Generate Fees
 Invoices
 Quick Update
 Receipts
 Generate
 Interment
 Locations
 Mapping
 Memorial
 Output
 Preferences
 Setup

List of Receipts

ID	Total	Voided	Names
62	5965.25	23/01/2005	Tahoe Funeral Service

Search

frmViewReceipts

The voided receipt will print and the above process will have updated the receipt as voided.



The voided receipt can be accessed via a [Receipt Search](#). You can also Reprint a voided Receipt

There are various reports associated with receipting that are available on your system

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Generate

Generate

 Register	<ul style="list-style-type: none"> • Generate Register Numbers for a single register • Generate Register numbers for all registers
 Windback	<ul style="list-style-type: none"> • Wind back numbers for a register • Numbers Generated Incorrectly


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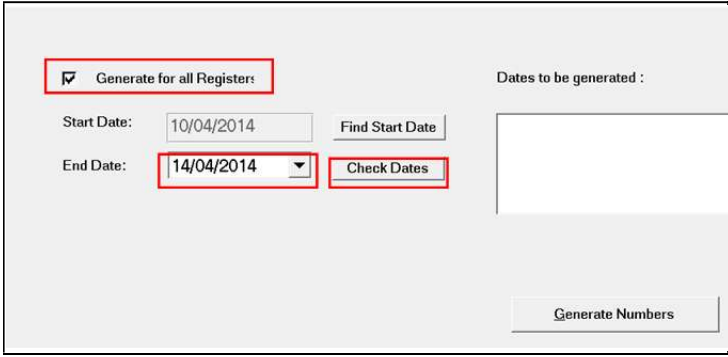
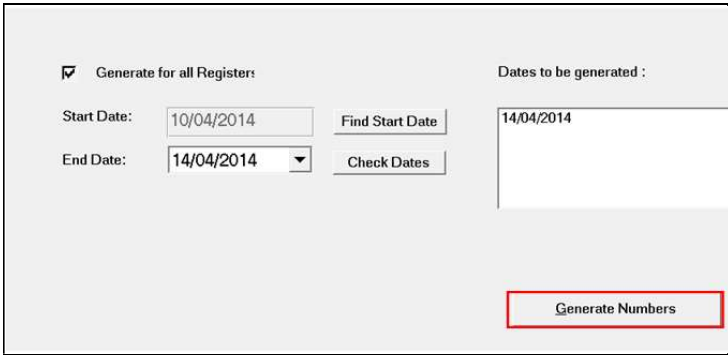
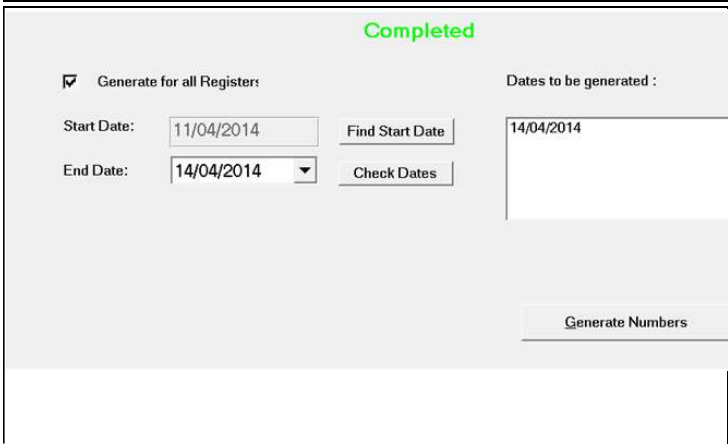
Numbers Generated Incorrectly

Numbers Generated Incorrectly	<ol style="list-style-type: none"> 1. Windback numbers to the last day that all numbers were correct: Wind Back Register Numbers 2. Working onwards through the diary from the last booking with a correct number, go into each unnumbered booking and check: <ul style="list-style-type: none"> • Is the age correct under the <i>Deceased details</i> tab? • Should the body part Indicator be set under <i>Deceased Details</i> tab? • Is the Location and Diary correct under <i>Initial information</i> tab? 3. Correct any errors found in Step 2 as necessary 4. Now check the Registers to see if the last numbers allocated are correct and amend if necessary following these instructions: Check and Amend Last Register Number 5. Reallocate Numbers: Generate Register Numbers 6. Go to the diary to check that register numbers have now been allocated correctly. <p>NOTE: Should you find that numbers are still incorrectly allocated please call the CSS Help desk on 08702 402 217</p>
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Generate Register Numbers For All register groups


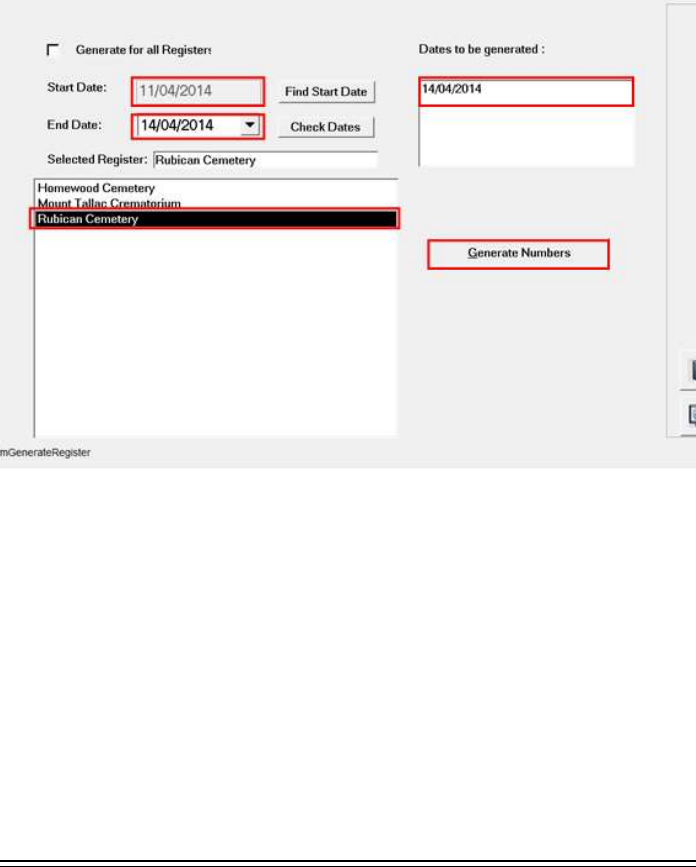
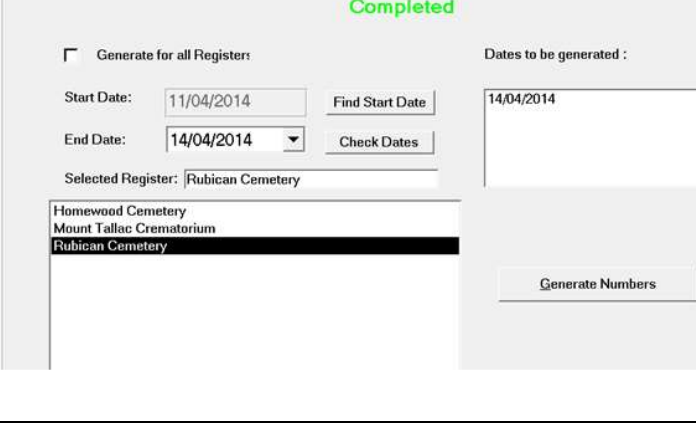
	Generate Register Numbers For All register groups <p>NOTE: <i>Generate</i> allows you allocate cremation and burial numbers for bookings in a register group(s). This process will also allocate strewing, exhumation, NVF and body part numbers providing that the register is set up to do so in BACAS: Check Registers Setup</p> <ol style="list-style-type: none"> 1. Select Generate from the Outlook bar on the left hand side. 2. Select Register from the expanded selection.
---	--

	<p>The <i>Generate Register Numbers</i> screen will be displayed.</p> <ol style="list-style-type: none"> 1. Tick <i>Generate for All Registers</i> 2. The <i>End Date</i> will default to today's date. Adjust this to reflect the day that you wish your last number to be allocated. (There should be a booking for this date) 3. Click on Check Dates
	<p>The <i>Dates to be generated</i> will be displayed on the right hand side of the screen.</p> <ol style="list-style-type: none"> 1. Check that these dates correspond to the bookings that exist within the date range 2. Click on Generate Numbers
	<p>The word Completed will be displayed in green at the top of the screen</p> <p>Go to the diaries to check that register numbers have been allocated correctly.</p> <p>NOTE: Should you find that numbers have been incorrectly allocated for any of the registers within the register group you will need to Wind back Numbers for a Register group then follow the guidelines: Numbers Generated Incorrectly</p>


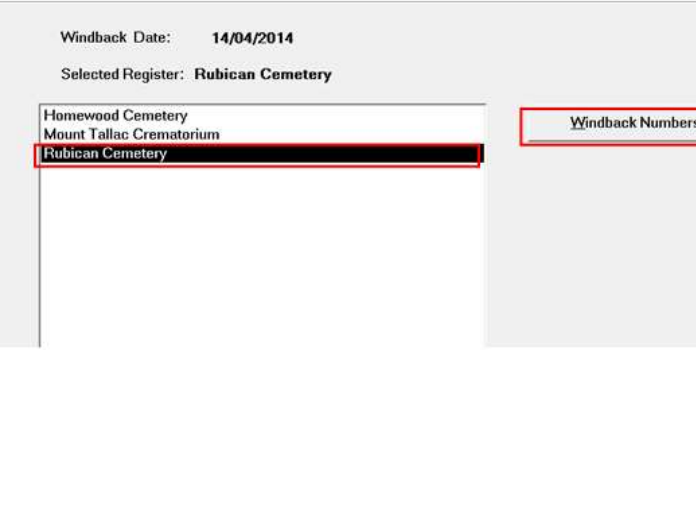
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Generate Register Numbers For A Single Register(group)

	<p>Generate Register Numbers For A Single Register(group) Back to Generate</p> <p>NOTE: <i>Generate</i> allows you allocate cremation and burial numbers for bookings in a register group. This process will also allocate strewing, exhumation, NVF and body part numbers providing that the register is set up to do so in BACAS: Check Registers Setup</p>
--	--

	<ol style="list-style-type: none"> 1. Select Generate from the Outlook bar on the left hand side. 2. Select Register from the expanded selection.
	<p>The <i>Generate Register Numbers</i> screen will be displayed.</p> <ol style="list-style-type: none"> 1. Click on the register group for which you wish to generate numbers. This will highlight it. 2. Check the <i>Start Date</i> displayed for this register group. This should be that day after the last number was allocated for this register group. NOTE: If this is not the case please call the CSS Help Desk (08702 402 217) for assistance before proceeding. 3. The <i>End Date</i> will default to today's date. Adjust this to reflect the day that you wish your last number to be allocated for this register group. (There should be a booking for the register group for this date) <p>The <i>Dates to be generated</i> will be displayed on the right hand side of the screen. Check that these dates correspond to the bookings that exist for this register group within the <i>Start Date</i> and <i>End Date</i> Range</p> <p>Click on Generate Numbers</p>
	<p>The word <i>Completed</i> will be displayed in green at the top of the screen</p> <ol style="list-style-type: none"> 1. Go to the diary to check that register numbers have been allocated correctly. NOTE: Should you find that numbers have been incorrectly allocated for any of the registers within the register group you will need to Wind back Numbers for a Register group then follow the guidelines: Numbers Generated Incorrectly




Wind Back Register Numbers For A Single Register (group)

	<p>Wind Back Register Numbers For A Single Register (group)</p> <p>NOTE: There are several reasons why you may wish to Windback the register numbers allocated for a register group:</p> <ol style="list-style-type: none"> A booking had not been entered on the diary when numbers were generated. - follow the instructions below to windback until the day before the missing booking; enter the booking on the diary and then Re- generate the numbers (Please be aware that any paperwork for renumbered bookings will need to be reissued) Bookings have been allocated the wrong numbers – follow the instructions below to windback until the last day that numbers were correct and then follow guidelines: Numbers Generated Incorrectly before attempting to reallocate numbers.
	<p>Select Generate from the Outlook bar on the left hand side.</p> <ol style="list-style-type: none"> Select Windback from the expanded selection.
	<p>The <i>Wind back Register</i> screen will be displayed.</p> <ol style="list-style-type: none"> Click on the <i>Register Group</i> for which you wish to wind back numbers. This will highlight it. Check the <i>Windback Date</i> displayed for this register group. This should be that last day that a number was allocated for this register group. NOTE: If this is not the case please call the CSS Help Desk (08702 402 217) for assistance before proceeding. Click on Windback Numbers to wind back the numbers for the date displayed
	<p>The Windback Date will change to an earlier date. This will reflect a new last</p>

	<p>day that a number was allocated for this register group.</p> <p>NOTE: If the original windback date does not change in Step 5 then windback has not occurred and you may need to contact the CSS Help Desk (08702 402 216) for assistance</p> <ol style="list-style-type: none"> 1. Numbers are wound back one day at a time. Repeat Step 5 until you reach the date required.
--	---

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Interment

Interment	Interment
 Burial	Burials <ul style="list-style-type: none"> • Correct Deceased entered in the wrong grave
 Graves	Graves <ul style="list-style-type: none"> • Search for an existing Grave by Location • Search for an existing Grave by Grave Owner or Deceased • Search for an existing Grave by Grant number or Burial Number • To Change Grave Owner Details
 Exhumations	Exhumations <ul style="list-style-type: none"> • Search for an existing exhumation • Exhume a deceased • Print an Exhumation Order Digging Slip

Can't find what you want in Interment? Follow the link to the [How to](#) Section

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Burials

 Burial	Correct Deceased entered in the wrong grave To Create A New grave From A Burial Booking
---	--

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[Correct Deceased entered in the wrong Grave](#)

Burials

Deceased: **Mr William Enrique Dann Coath** Date: **Thu, 13/05/2004** Time: **11:30**

Funeral Director: **Cookson and Smythe Funeral Director** Service: **Burial**

Location: **Rubican Cemetery - Section A - 003** **1002**

Initial Info | Deceased Details | **Burial Details** | Service Details | Music | Applicant | Memorials | Misc. | Finance | VO

Grave: **003**

Type of Grave: **Traditional Grave**

Max Coffins: **3**

Max Ashes: **4**

Interments:

Post	Forenames	Surname
1	Maira Jean	Coath
2	William Enrique Dann	Coath

Burial Number: **1002** Other:

Container:

Position: **2**

Head Width: Length: **6ft 2in**

Shoulder Width: **22in** Depth: **5ft**

Feet Width:

Remarks:

Buttons: **Create** **Select** **Clear** **Map** **View** **End** **Add Previous Interments**

frmBurials

1. Open the Burial record for the deceased
2. Select the **Burial Details** tab and click on the **Pencil**

Burials

Deceased: **Mr William Enrique Dann Coath** Date: **Thu, 13/05/2004** Time: **11:30**

Funeral Director: **Cookson and Smythe Funeral Director** Service: **Burial**

Location: **Rubican Cemetery - Section A - 003** **1002**

Initial Info | Deceased Details | **Burial Details** | Service Details | Music | Applicant | Memorials | Misc. | Finance | VO

Grave: **003**

Type of Grave: **Traditional Grave**

Max Coffins: **3**

Max Ashes: **4**

Interments:

Post	Forenames	Surname
1	Maira Jean	Coath
2	William Enrique Dann	Coath

Burial Number: **1002** Other:

Container:

Position: **2**

Head Width: Length: **6ft 2in**

Shoulder Width: **22in** Depth: **5ft**

Feet Width:

Remarks:

Buttons: **Create** **Select** **Clear** **Map** **View** **End** **Add Previous Interments**

frmBurials

Click on the **Clear** button and then **Save**

Burials

Deceased: **Mr William Enrique Dann Coath** Date: **Thu, 13/05/2004** Time: **11:30**

Funeral Director: **Cookson and Smythe Funeral Director** Service: **Burial**

Location: **1002**

Initial Info | Deceased Details | **Burial Details** | Service Details | Music | Applicant | Memorials | Misc. | Finance | VO

Grave:

Type of Grave:

Max Coffins: **0**

Max Ashes: **0**

Interments:

Post	Forenames	Surname
------	-----------	---------

Burial Number: **1002** Other:

Container:

Position: **1**

Head Width: Length:

Shoulder Width: Depth:

Feet Width:

Remarks:

Buttons: **Create** **Select** **Clear** **Map** **View** **End** **Add Previous Interments**

frmBurials

The grave details will be removed from the burial screen

Click on **Select** to select the correct grave (If the grave does not exist, click on **Create** See: Create a new grave)

Location Criteria Form

Type : Graves

Main Location: Rubican Cemetery

Sub Location: Section A
Section B
Section C
Section D
Section E
Section F
Section G

Detail Location: 013
014
015
016
017

Reference : End Grave : Clear

Select New Grave New Position Exit

frmCriteriaGraveSelection

The *Location Criteria Form* will be displayed.

Select location of the correct grave, followed by click on **Select**

Burials

Deceased: Mr William Enrique Dann Coath Date: Thu, 13/05/2004 Time: 11:30

Funeral Director: Cookson and Smythe Funeral Director Service: Burial

Location: Rubican Cemetery - Section A - 017 1002

Initial Info Deceased Details Burial Details Service Details Music Applicant Memorials Misc Finance VO

Grave Create Select Clear Burial

Map View End Add Previous Interments

Grave: 017

Type of Grave: Traditional Grave

Max Coffins: 3

Max Ashes: 4

Interments:

Post	Forenames	Surname
1	John	Haddrell
2	Albert James	Haddrell

Burial Number: 1002 Other:

Container: Coffin

Position: 3

Head Width: 18 ins Length: 6ft

Shoulder Width: 22 ins Depth: 18in

Feet Width: 18 ins

Remarks

frmBurials

The Burial record will display the correct grave.

Enter Container type, Position, Width and Depth Information and click on **Save**

Burials

Deceased: Mr William Enrique Dann Coath Date: Thu, 13/05/2004 Time: 11:30

Funeral Director: Cookson and Smythe Funeral Director Service: Burial

Location: Rubican Cemetery - Section A - 017 1002

Initial Info Deceased Details Burial Details Service Details Music Applicant Memorials Misc Finance VO

Grave Create Select Clear Burial

Map View End Add Previous Interments

Grave: 017

Type of Grave: Traditional Grave

Max Coffins: 3

Max Ashes: 4

Interments:

Post	Forenames	Surname
1	John	Haddrell
2	Albert James	Haddrell
3	William Enrique Dann	Coath

Burial Number: 1002 Other:

Container: Coffin

Position: 3

Head Width: 18 ins Length: 6ft

Shoulder Width: 22 ins Depth: 18in

Feet Width: 18 ins

Remarks

frmBurials

The deceased will be displayed under Interments.

Deceased : Mr Brian Leman Date : Tue, 18/02/2014 Time : 11:00
 Funeral Dir.: Tahoe Funeral Services Service : Burial of Cremated Remains
 Location : 0

Initial Info Deceased Details **Burial Details** Service Details Music Applicant Memorials Misc. Finance VO

Appointment 1933 Deceased 3780

Date : 18/02/2014 Client Request
 Time : 11:00
 Privacy : Public
 Status :
 Diary :
 Rubican Cemetery
 Location :
 Rubican Cemetery
 Type of Service : Burial of Cremated Remains
 View Funeral Dir Private Clear
 Funeral Director : Tahoe Funeral Services

Title : Mr
 Forenames : Brian
 Surname : Leman
 Maidenname :
 Other name :
 Address Line 1 : 12 Hill View,
 Address Line 2 : Tahoe
 Address Line 3 : Sussex
 Address Line 4 :
 Address Line 5 :
 Address Line 6 :
 Post Code : BN6 8TF
 Comments : 0

1. Open the Burial record for the deceased (See: Client, All Bookings)
2. Select the **Burial Details** tab and click on the **Pencil**

Deceased : Mr Brian Leman Date : Tue, 18/02/2014 Time : 11:00
 Funeral Dir.: Tahoe Funeral Services Service : Burial of Cremated Remains
 Location : 0

Initial Info Deceased Details Burial Details Service Details Music Applicant Memorials Misc. Finance VO

Grave **Create** Select Clear
 View Find

Grave :
 Type of Grave :
 Max Coffins : 0
 Max Ashes : 0

Interments:

Burial
 Add Previous Interments
 Burial Number: 0 Other:
 Container:
 Position : 1
 Head Width : Length :
 Shoulder Width : Depth :
 Feet Width :
 Remarks :

1. Click on the **Create** Button

Use this screen to create a new Grave

Rubican Cemetery - Section G - 641

Cemetery : Rubican Cemetery
 Section : Section G

Type : Graves

Grave Reference : 641
 Additional Reference :
 Type : Cremated Remains Grave
 Max Coffins : 0 Consecrated ☐
 Max Ashes : 4

frmWizNewGrave Exit Create

The *New Location Wizard* will open

1. Select the *Cemetery*
2. Select the *Section*
3. Type in the Grave Reference (and Additional reference if relevant) for the new grave
4. Select the *Type of grave*
5. Adjust the values for Max Coffins and Max Ashes if necessary
6. Click on the **Create** button

BACAS will return you to the Burial Record with the location and details of the new grave displayed.

The grave is now created. It is advisable at this stage select the container for the burial, the burial position coffin width, length and depth if this information is known.

The Contract for the Grave can also be created at this stage.

1. Click on the **Save** button

The deceased will be displayed under Interments.

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Graves



Graves

- [Search for an existing Grave by Location](#)
- [Search for an existing Grave by Grave Owner or Deceased](#)
- [Search for an existing Grave by Grant number or Burial Number](#)
- [To Change Grave Owner Details](#)
- [Add a Second Grave Owner to a Grave](#)
- [Add Historical Interments to A Grave](#)

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Add Historical Interments to A Grave

Grave Information

Bacas ID : 1112

Main Location : Rubican Cemetery
 Sub Location : Section 1
 Grave Reference : 1
 Additional Reference :

Grant Ref:
 Grave Notes:

General Interments Owner(s) Notes Memorials Strewing Risk Assessment Exhumation Finance

Interments : View New Delete Exhume

Pos. Name Burial/Exhumation Container

Auto Number Positions

frmGraveInfo

1. Open the *Grave Information Screen* for the Grave. (Use one of the following links for instruction on how to do this) ([Search for a Grave by Location](#), or [Search for a Grave by Grave Owner/Deceased](#), or [Search for a Grave by Grant Number/Burial Number](#))

2. Select the **Interment** Tab
3. Click on the **Edit** pencil

Grave Information

Bacas ID : 1112

Main Location : Rubican Cemetery
 Sub Location : Section 1
 Grave Reference : 1
 Additional Reference :

Grant Ref:
 Grave Notes:

General Interments Owner(s) Notes Memorials Strewing Risk Assessment Exhumation Finance

Interments : View New Delete Exhume

Pos. Name Burial/Exhumation Container

Auto Number Positions

frmGraveInfo

1. Click on the **New** button

Please enter the interment details for Rubican Cemetery~Section I~1

Title: Mrs
 Forenames: Mabel
 Surname: Stokes

Address Line 1: 34 Richmond Way
 Address Line 2: Tahoe
 Address Line 3: Sussex
 Address Line 4:
 Address Line 5:
 Address Line 6:

Post Code: BN7 5PS

Use Owners Address
 Use Previous Interment Address

frmWizInterment1

Exit Next

The *Create interment Wizard* screen will open

1. Enter the Name for the first deceased in the grave
2. Enter the address and for the first deceased in the grave
3. Click on **Next**

Please enter the interment details for Mabel Stokes, Rubican Cemetery~Section I~1

Diary : Rubican Cemetery

Burial Date : 26/02/1904

Time : 12:00

Burial Number : 931

Type of Service : Burial

Container: Coffin

Depth : 7ft 6in

Position in Grave: 1

Age : 71 Years

Gender : Female

Death Location :

Death Date : 15/02/1904

Body Part ☐

frmWizInterment2

Exit Previous **Create**

The second *Create interment Wizard* screen will open.

1. Enter the *Burial Date* for the funeral
2. Enter any other information you have about the deceased
3. Click on **Create**

Grave Information

Bacas ID : 1112

Main Location : Rubican Cemetery

Sub Location : Section I

Grave Reference : 1

Additional Reference :

Grant Ref:

Grave Notes:

General Interments Owner(s) Notes Memorials Strewing Risk Assessment Exhumation Finance

Interments: View New Delete Exhume

Pos.	Name	Burial/Exhumation	Container
1	Mabel Stokes	26/02/1904	Coffin

Auto Number Positions

frmGraveInfo

The *Grave Information Screen* is displayed showing details of the interment

1. Repeat the previous steps to add subsequent interments in the grave.
2. When all interments have been added click on the **Save** Button

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Add a Second Grave Owner to a Grave

	Add a Second Grave Owner to a Grave
--	-------------------------------------

Grave Information

Bacas ID : 1011

Main Location : * Rubican Cemetery

Sub Location : * Section G

Grave Reference : * 641

Additional Reference : A

Grant Ref: 120

Grave Notes:

General | Interments | **Owner(s)** | Notes | Memorials | Strewing | Risk Assessment | Exhumation | Finance

Contracts:

ID	Start	End	Status
671	18/02/2014	17/02/2064	Current

Owners:

Forename	Surname
Mrs. Sarah	Leman

fmGraveInfo

1. Open the *Grave Information Screen* for the Grave. (Use one of the following links for instruction on how to do this) ([Search for a Grave by Location](#), or [Search for a Grave by Grave Owner/Deceased](#), or [Search for a Grave by Grant Number/Burial Number](#))
2. Select the **Owner(s)** Tab
3. Ensure that *Current* Contract is selected
4. Select the existing *Owner*
5. Click on bottom **Finger**

Grave Owner Information

Client is dead ☐

BACAS ID: 3781

General | Other Info | History

Frequently Used | Seldom Used | Never Used

Title: Mrs

Forenames: Sarah

Surname: * Leman

Address Line 1: 14 park Avenue,

Address Line 2: Tahoe

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code: BN6 8TF

Telephone 1:

Mobile:

+ Add

fmClientE

The *Grave Owner Information* screen will be displayed with the details of the existing owner.

1. Click on the **New Owner** button

Grave Owner Information

Client is dead ☐

BACAS ID:

General | Other Info | History

Frequently Used | Seldom Used | Never Used

Title: Mr

Forenames: Bill

Surname: * Leman

Address Line 1: 12 Stancross Street

Address Line 2: Tahoe

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code: BN6 4DL

Telephone 1:

Mobile:

+ Add

fmClientE

A new *Grave Owner Information* screen will be displayed in edit mode

1. Enter the name and address of the second grave owner.
2. Click on the **Finger** button

Grave Information

Bacas ID : 1011

Main Location : * Publican Cemetery
 Sub Location : * Section G
 Grave Reference : * 641
 Additional Reference : A

Grant Ref: 120
 Grave Notes:

General | Interments | **Owner(s)** | Notes | Memorials | Strewing | Risk Assessment | Exhumation | Finance

Contracts:

ID	Start	End	Current	Status
671	18/02/2014	17/02/2064	Current	120

Owners:

Forename	Surname
Mrs Sarah	Leman
Mr Bill	Leman

fmGraveInfo

You will be returned to the *Owner(s)* tab of the *Grave Information* screen – showing details of the second owner. Repeat the steps to add further owners

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Amend A Grave Contract

Grave Information

Bacas ID : 1011

Main Location : * Publican Cemetery
 Sub Location : * Section G
 Grave Reference : * 641
 Additional Reference : A

Grant Ref: 120
 Grave Notes:

General | Interments | **Owner(s)** | Notes | Memorials | Strewing | Risk Assessment | Exhumation | Finance

Contracts:

ID	Start	End	Current	Status
671	18/02/2014	17/02/2064	Current	120

Owners:

Forename	Surname
Mrs Sarah	Leman

fmGraveInfo

NOTE: Follow these instructions if there was a mistake when setting up the original contract for example the wrong amount was entered; the end date of the contract is wrong or the contract was given the wrong grant number. DO NOT follow these instructions for Transfer of Exclusive Rights of Burial of the Grave.

1. Open the *Grave Information Screen* for the Grave. (Use one of the following links for instruction on how to do this) ([Search for a Grave by Location](#), or [Search for a Grave by Grave Owner/Deceased](#), or [Search for a Grave by Grant Number/Burial Number](#))
1. Select the **Owner(s)** Tab
2. Ensure that *Current* Contract is selected
3. Click on top **Finger**

The *Grave Contracts* screen will be displayed

1. Click on the **Edit** pencil
2. Amend the field in question (see examples below)
3. Click on the **Save** button
4. Click on the **Exit** button to return to the Grave information Screen

The amended grave contract will be displayed

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Change Owner details

1. Open the Grave Information Screen for the Grave. (Use one of the following links for instruction on how to do this) ([Search for a Grave by Location](#), or [Search for a Grave by Grave Owner/Deceased](#), or [Search for a Grave by Grant Number/Burial Number](#))

1. Select the Owner(s) Tab
1. Ensure that Current Contract details are Selected

1. Select the Owner whose details are to be amended

1. Click on bottom Finger

The Grave Owner Information screen will be displayed with the owner highlighted.

Click on the Edit Pencil

The Grave Owner Information screen will be displayed in edit mode

Enter amendments and click on the Save button

A warning Message will appear

ENSURE YOU SELECT THE CORRECT BUTTON!

Grave Information

Bacus ID : 764

Main Location : * Rubicon Cemetery

Sub-Location : * Section A

Grant Ref: 119

Grave Reference : * 011

Grave Notes:

Additional Reference :

General | Interments | Owner(s) | Notes | Memorials | Strewing | Risk Assessment | Exhumation | Finance

Grave Type : * Traditional Grave

Denomination :

Max Coffins : * 2

Max Ashes : * 4

Permit No : 0

Private : ☐

Manual Dig : ☐

Consecrated : ☐

Head width :

Shoulder width :

Feet width :

Length :

Depth :

Link to Map


BmGraveInfo

1.

--	--

--	--

	1.
--	----

	2.
<div><div>Grave Information</div><div><div>Bacas ID : 764</div><div>Main Location : * Rubican Cemetery</div><div>SubLocation : * Section B</div><div>Grave Reference : * 012</div><div>Additional Reference :</div><div>Grant Ref: 119</div><div>Grave Notes:</div></div><div><div>General</div><div>Interments</div><div>Owner(s)</div><div>Notes</div><div>Memorials</div><div>Stowing</div><div>Risk Assessment</div><div>Exhumation</div><div>Finance</div></div><div><div><div>Grave Type : * Traditional Grave</div><div>Denomination :</div><div>Max Coffins : * 3</div><div>Max Ashes : * 4</div><div>Permit No : 0</div><div>Private : <input type="checkbox"/></div><div>Manual Dig : <input type="checkbox"/></div><div>Consecrated : <input type="checkbox"/></div><div>Head width :</div><div>Shoulder width :</div><div>Feet width :</div><div>Length :</div><div>Depth :</div><div>Link to Map</div></div></div><div>ItemGraveInfo</div></div>	1.

	2.
	3.

	<p>This change will update the burial records for any deceased interred in the grave . If a contract exists on the grave , it will be updated to reflect the new Section/Grave reference. It is advisable to reissue the deed.</p>
--	--

Grave Information

Bacas ID : 999

Main Location : Rubican Cemetery
Sub Location : Section G
Grave Reference : 2
Additional Reference :

General | Interments | **Owner(s)** | Notes | Memorials | Strewing | Risk Assessment | Exhumation | Finance

Contracts:

ID	Start	End	Status

Owners:

Forename	Surname

frmGraveInfo

1. Open the *Grave Information Screen* for the Grave. (Use one of the following links for instruction on how to do this) ([Search for a Grave by Location](#), or [Search for a Grave by Grave Owner/Deceased](#), or [Search for a Grave by Grant Number/Burial Number](#))

1. Select the **Owner(s)** Tab
2. Click on the **Edit** pencil

Grave Information

Bacas ID : 999

Main Location : Rubican Cemetery
Sub Location : Section G
Grave Reference : 2
Additional Reference :

General | Interments | Owner(s) | Notes | Memorials | Strewing | Risk Assessment | Exhumation | Finance

Contracts:

ID	Start	End	Status

Owners:

Forename	Surname

frmGraveInfo

1. Click on the **New Contract** button

Grave Ownership Setup

Please indicate:

1. whether grave Rubican Cemetery~Section G~2 is to be Purchased, or Reserved for Purchase
2. What is the Purchased or Reserved Period
3. What amount is to be paid

Purchase Type

☒ **Purchased**
☐ Reserved

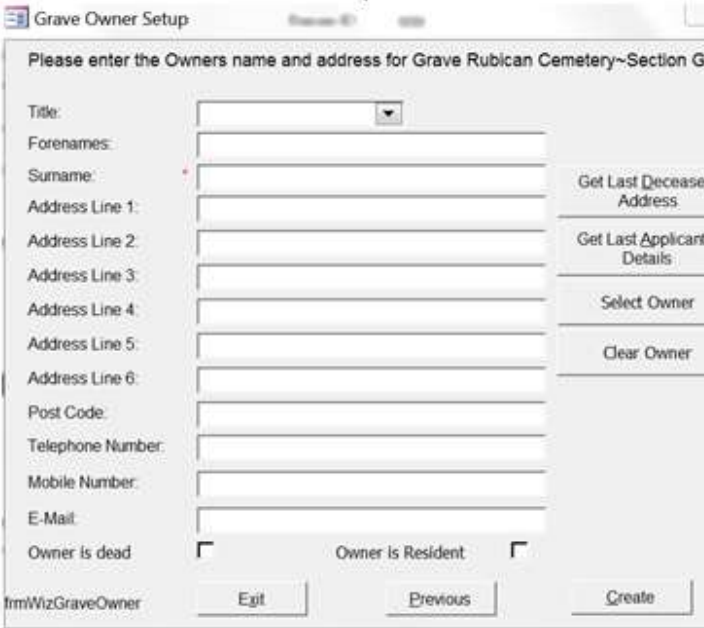
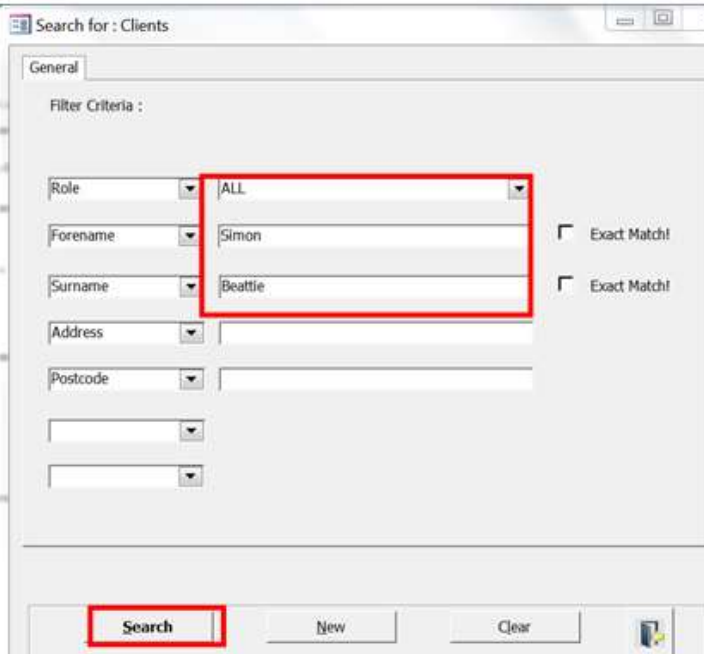
Purchase Period and Amount Paid

From Date: 11/02/2014 To Date: 10/02/2064 Calculate
Amount: 1500 Grant No : 121 Next Grant
Tax 1: 0 Suffix :
Tax 2: 0 Purchase Reg. No :
Total Paid: £1,500.00 Suffix :

frmWizGraveTerm Exit Next

The *Grave Ownership Set up* screen will open

1. Select the *Purchase type*
2. Check that the Contract *Start Date* is correct – This will default to today's date and you may wish to change this to reflect the burial date of the first interment
3. Click on **Calculate** to calculate the contract *End Date*. This will be calculated from the Exclusive right of Burial period set up in BACAS for the type of grave. Check and amend this date if necessary.
4. Enter the *Amount* for the Exclusive Right of Burial
5. Click on **Next Grant** to generate the next available grant number.

	<p>This is calculated from the Grave Register for the cemetery. Check and amend if necessary.</p> <ol style="list-style-type: none"> Click on the Next
 <p>The screenshot shows the 'Grave Owner Setup' window. It has a title bar 'Grave Owner Setup' and a subtitle 'Please enter the Owners name and address for Grave Rubican Cemetery~Section G-'. The form contains fields for Title (dropdown), Forenames, Surname, Address Line 1 through 6, Post Code, Telephone Number, Mobile Number, and E-Mail. There are checkboxes for 'Owner is dead' and 'Owner is Resident'. On the right, there are buttons: 'Get Last Deceased Address', 'Get Last Applicants Details', 'Select Owner', and 'Clear Owner'. At the bottom are 'Exit', 'Previous', and 'Create' buttons. The window title is 'frmWizGraveOwner'.</p>	<p>The next screen will allow you to enter name and address for the (first) Grave Owner</p> <ol style="list-style-type: none"> It is wise at this stage to search to see if the owner already exists on the System (for example as an existing grave owner/memorial applicant or an applicant for an earlier funeral) Click on Select Owner
 <p>The screenshot shows the 'Search for Clients' window. It has a title bar 'Search for : Clients'. The 'General' tab is selected. Under 'Filter Criteria', there are dropdowns for Role (set to 'ALL'), Forename (set to 'Simon'), Surname (set to 'Beattie'), Address, and Postcode. There are checkboxes for 'Exact Match!' next to the Forename and Surname fields. At the bottom, there are 'Search', 'New', and 'Clear' buttons. The 'Search' button is highlighted with a red box.</p>	<p>The <i>Search for Clients</i> Screen will open</p> <ol style="list-style-type: none"> Select Role All Enter the forename and Surname of the Grave owner Click on Search

Grave Owner Information

Client is dead ☐ BACAS ID: 2846

Simon Beattie

General | Other Info | History

☐ Frequently Used ☐ Seldom Used ☐ Never Used

Title: Mr Address:

Forenames: Simon

Surname: Beattie

Address Line 1: 56 Baker Street,

Address Line 2: Tahoe,

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code:

Telephone 1:

Mobile:

+ Add

frmClientBE

If the Grave Owner already exists in BACAS the client information screen will display the Grave owner

1. Click on the Finger to select the grave Owner and return to Grave ownership Setup

Grave Owner Setup

Please enter the Owners name and address for Grave Rubican Cemetery~Section G-2

Title: Mr

Forenames: Simon

Surname: Beattie

Address Line 1: 56 Baker Street,

Address Line 2: Tahoe,

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code:

Telephone Number:

Mobile Number: 07856 312 456

E-Mail: beattie@googlemail.com

Owner is dead ☐ Owner is Resident ☒

Get Last Deceased Address

Get Last Applicants Details

Select Owner

Clear Owner

frmWizGraveOwner

Exit Previous Create

1. If the Grave Owner does not already exist on the system, click on the **Exit** button to return to *Grave Ownership Setup* and then enter his name and address manually
2. Click on **Clear Owner** at any stage to clear details and start again
3. Enter telephone number/mobile number for the grave owner
4. Enter an email address for the Grave Owner
5. Click on the **Create** button

Grave Contracts

ID: 672

Start Date: 11/02/2014 End Date: 10/02/2064

Status: Current Transfer of Rights: Current

Notes:

Grave: Rubican Cemetery~Section G-2

Grant produced: ☒

Grant No: 121 Suffix:

Purchase Reg. No: 0 Suffix:

Amount: 1500 Tax 1: 0 Tax 2: 0

Next Grant

Owners: Mr Simon Beattie

frmGraveContracts

The Grave Contract Screen will open. It will reflect the details of the new contract:

1. Click on the **Exit** button to return to the *Grave Information* record for the deceased.

Grave Information

Bacas ID : 939

Main Location : Rubican Cemetery

Sub Location : Section G

Grave Reference : 2

Additional Reference :

Grant Ref:

Grave Notes:

Contracts:

ID	Start	End	Status
672	11/02/2014	10/02/2064	Current

Owners:

Forename: Mr Surname: Simon Beattie

Save

The *Grave Information* screen will display the new Contract Details

1. Click on the **Save** Button

Created with the Standard Edition of HelpNDoc: Free help authoring environment

Create A New grave From A Burial Booking

Burials

Deceased : Mr Brian Leman

Date : Tue, 18/02/2014

Time : 11:00

Funeral Dir. : Tahoe Funeral Services

Service : Burial of Cremated Remains

Location :

Initial Info Deceased Details **Burial Details** Service Details Music Applicant Memorials Misc. Finance VO

Appointment

Date : 18/02/2014

Time : 11:00

Privacy : Public

Status :

Location : Rubican Cemetery

Type of Service : Burial of Cremated Remains

Funeral Director : Tahoe Funeral Services

Create

1. Open the Burial record for the deceased (See: Client, All Bookings)
2. Select the **Burial Details** tab and click on the **Pencil**

Burials

Deceased : Mr Brian Leman

Date : Tue, 18/02/2014

Time : 11:00

Funeral Dir. : Tahoe Funeral Services

Service : Burial of Cremated Remains

Location :

Initial Info Deceased Details **Burial Details** Service Details Music Applicant Memorials Misc. Finance VO

Grave

Type of Grave :

Max Coffins : 0

Max Ashes : 0

Interments:

Burial

Burial Number: 0

Container:

Position : 1

Head Width :

Shoulder Width :

Feet Width :

Length :

Depth :

Remarks

Create

1. Click on the **Create** Button

New Location Wizard

Use this screen to create a new Grave

Rubican Cemetery - Section G - 641

Cemetery : * Rubican Cemetery

Section : * Section G

Type : Graves

Grave Reference : * 641

Additional Reference :

Type : * Cremated Remains Grave

Max Coffins : * 0

Max Ashes : * 4

Consecrated ☐

Exit Create

The *New Location Wizard* will open

1. Select the *Cemetery*
2. Select the *Section*
3. Type in the Grave Reference (and Additional reference if relevant) for the new grave
4. Select the *Type of grave*
5. Adjust the values for Max Coffins and Max Ashes if necessary
6. Click on the **Create** button

Burials

Deceased : Mr Brian Leman Date : Tue, 18/02/2014 Time : 11:00

Funeral Dir. : Tahoe Funeral Services Service : Burial of Cremated Remains

Location : Rubican Cemetery ~ Section G ~ 641 ~ A

Initial Info Deceased Details Burial Details Service Details Music Applicant Memorials Misc Finance VO

Grave Create Select Clear

Map View Add Owner End

Grave : 641 ~ A

Type of Grave : Cremated Remains Grave

Max Coffins : 0

Max Ashes : 4

Interments:

1 Brian Leman (2ft)

Burial

Burial Number: 0 Other:

Container: Cremated Remains Casket

Position: 1

Head Width: Length: 2ft

Shoulder Width: Depth: 2ft

Feet Width:

Remarks

BACAS will return you to the Burial Record with the location and details of the new grave displayed.

1. Enter The *Container* used for the burial.
2. Enter *width and depth details* as appropriate
3. Click on **Add Owner**

Grave Ownership Setup

Please indicate:

1. whether grave Rubican Cemetery~Section G~641~A is to be Purchased, or Reserved for Purchase
2. What is the Purchased or Reserved Period
3. What amount is to be paid

Purchase Type

☒ Purchased

☐ Reserved

Purchase Period and Amount Paid

From Date: * 18/02/2014 To Date: * 17/02/2064 Calculate

Amount: 995 Grant No: 120 Next Grant

Tax 1: 0 Suffix:

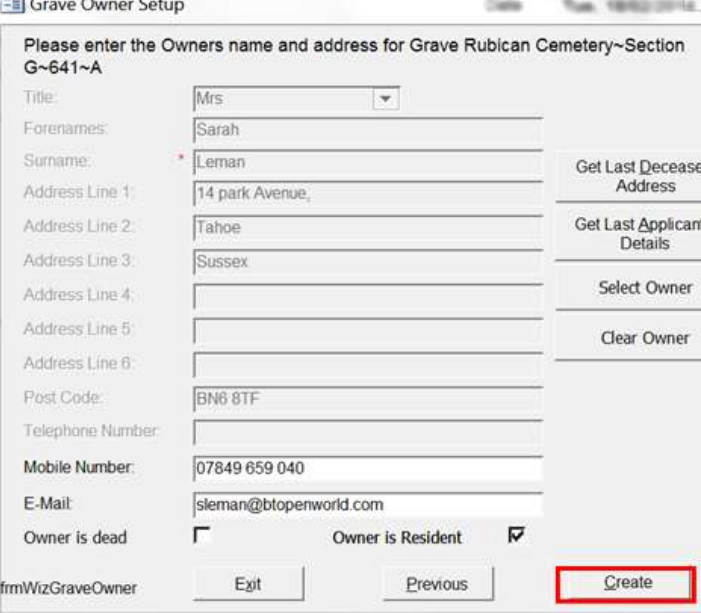
Tax 2: 0 Purchase Reg. No:

Total Paid: £995.00 Suffix:

frmWizGraveTerm Exit Next

The Grave Ownership Set up screen will open

1. Select the Purchase type *Purchased*
2. Check that the Contract *Start Date* Contract is correct – This will default to today's date and you may wish to change this to reflect the burial date of the first interment
3. Click on **Calculate** to calculate the contract *End Date*. This will be calculated from the Exclusive right of Burial period set up in BACAS for the type of grave. Check and amend this date if necessary.

	<ol style="list-style-type: none"> 4. Enter the Amount for the Exclusive Right of Burial 5. Click on Next Grant to generate the next available grant number. This is calculated from the Grave Register for the cemetery Check and amend if necessary 6. Click on the Next button
	<p>The next screen will allow you to enter name and address details for the (first) Grave Owner</p> <ol style="list-style-type: none"> a. If the owner is the applicant for the burial click on Get Last Applicant Details b. If the owner is not the applicant for this burial then click on Select Owner. It is wise at this stage to search to see if the owner already exists on the System (for example an existing grave owner/memorial applicant, applicant for an earlier funeral) c. Otherwise enter the name and address of the owner manually (If the owner is resident at the Deceased address then click Get Last Deceased Address) d. Click on Clear Owner at any stage to clear details and start again <ol style="list-style-type: none"> 1. Enter telephone number/mobile number for the grave owner 2. Enter an email address for the Grave Owner 3. Click on the Create button

Grave Contracts

ID: 671

Start Date: 18/02/2014 End Date: 17/02/2064

Status: Current Transfer of Rights: Current

Notes:

Grave: Rubican Cemetery Section G-641-A

Grant produced:

Grant No: 120 Suffix:

Purchase Reg. No: 0 Suffix:

Amount: 995 Tax 1: 0 Tax 2: 0

Next Grant

Owners: Mrs Sarah Leman

The Grave Contract Screen will open:

Click on the **Exit** button to return to the Burial record for the deceased

Burials

Deceased: Mr Brian Leman Date: Tue, 18/02/2014 Time: 11:00

Funeral Dir.: Tahoe Funeral Services Service: Burial of Cremated Remains

Location: Rubican Cemetery - Section G - 641 - A

Initial Info | Deceased Details | Burial Details | Service Details | Music | Applicant | Memorials | Misc. | Finance | VO

Grave: 641 ~ A

Type of Grave: Cremated Remains Grave

Max Coffins: 0

Max Ashes: 4

Interments:

1 Brian Leman (2ft)

Burial

Burial Number: 0 Other:

Container: Cremated Remains Casket

Position: 1

Head Width: Length:

Shoulder Width: Depth: 2ft

Feet Width:

Remarks:

1. Click on the **Save** Button

Created with the Standard Edition of HelpNDoc: [Free Qt Help documentation generator](#)

Create A Pre Purchase Or Reserved Grave

Clients

Cremation

Diary

Finance

Generate

Interment

Burial

Graves

1. Select **Interment** from the *Outlook bar* on the left hand side.
2. Select **Graves** from the expanded selection.

The *Search for Locations* screen will be displayed.

1. Click on the **New** button

The *New Location Wizard* will open

1. Select the *Cemetery*
2. Select the *Section*
3. Type in the Grave Reference (and Additional reference if relevant) for the new grave
4. Select the *Type of grave*
5. Adjust the values for Max Coffins and Max Ashes if necessary

Click on the **Create** button

The *Grave Information* Screen will open.

1. To create a contract for the Pre purchased or Reserved Grave follow the link: [Setup A Grave Contract For An Existing Grave](#)
2. To record payment of the Pre Purchased or Reserved Grave follow the link: Receipt A Grave Owner for Exclusive Right of Burial

Created with the Standard Edition of HelpNDoc: [Easy EBook and documentation generator](#)

Create A Range of Graves

1. Select **Interment** from the *Outlook bar* on the left hand side.
2. Select **Graves** from the expanded selection.

The *Search for Locations* screen will be displayed.

1. Click on the **New** button

Use this screen to create a new Grave

Rubican Cemetery - Section I

Cemetery : Rubican Cemetery

Section : Section I

☐ Single ☒ Range

Type : Graves

Start Number : 001 End Number : 100

Prefix : Suffix :

Type : Traditional Grave

Max Coffins : 3 Consecrated ☐

Max Ashes : 4

Exit Create

The *New Location Wizard* will open

1. Select the *Cemetery*
2. Select the *Section*
3. Set the *Range Indicator*
4. Type in the *Grave Reference* for the first grave in this range
5. Type in the *Grave Reference* for the last grave in this range
6. Enter a *Prefix* and/or *Suffix* to be applied to each grave in this range if relevant.
7. Select the *Type of Grave* for this range
8. Adjust the values for *Max Coffins* and *Max Ashes* if necessary

Click on the **Create** button

Grave Information

Bacas ID : 1211

Main Location : Rubican Cemetery Grant Ref:

SubLocation : Section I Grave Notes:

Grave Reference : 100

Additional Reference :

General Interments Owner(s) Notes Memorials Strewing Risk Assessment Exhumation Finance

Grave Type : Traditional Grave

Denomination :

Max Coffins : 3 Head width :

Max Ashes : 4 Shoulder width :

Permit No : 0 Feet width :

Private : Length :




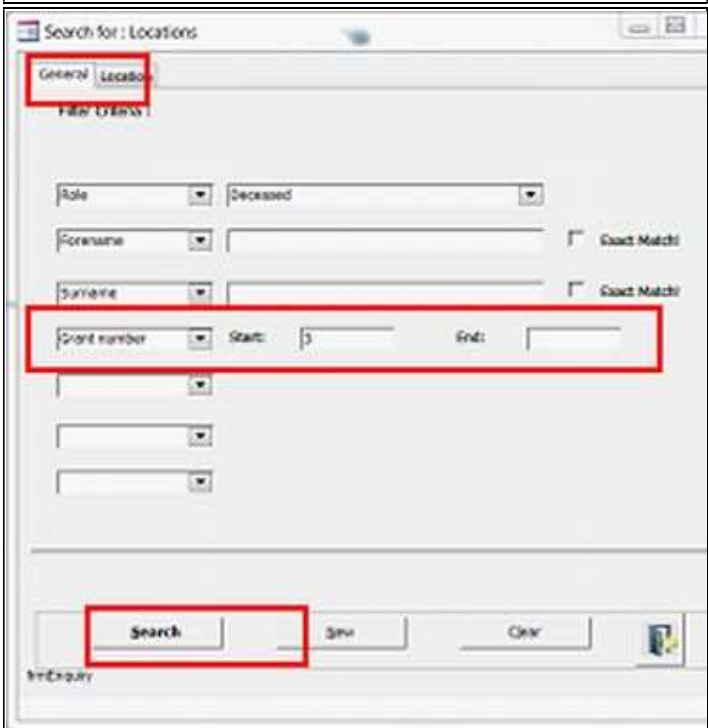
Manual Dig : Depth :

Consecrated : ☐

Link to Map

The *Grave Information* Screen for the last grave in the range will open.

1. Click on the **Exit** button

<div> <div> Clients Cremation Diary Finance Generate Interment </div> <div>  Burial  Graves  Exhumations </div> <div> Locations Mapping Memorial Output Preferences Setup </div> </div>	<p>Select Interment from the Outlook bar on the left hand side</p> <p>Select Graves from the expanded selection</p>
	<p>The Search for Locations screen will be displayed</p> <p>Ensure that the General tab is selected</p> <ol style="list-style-type: none"> To search by Grant number ensure that Grant Number is selected and enter the Grant Number in the adjacent field Click on the Search button To search by Burial Number ensure that Burial/Cremation Number is selected and enter the Burial Number in the adjacent field Click on the Search button

The screenshot shows the 'Select Grave' screen. The sidebar on the left contains a list of navigation options. The 'Graves' option is highlighted with a red box. The main area displays the selected grave information, including the cemetery name, section, and grave number. It also shows fields for owners, burials, disposal/scattering, and memorials.

The Select Grave screen will be displayed with the grave highlighted
Click on the Finger

The screenshot shows the 'Grave Information' screen. The sidebar on the left contains a list of navigation options. The main area displays a form for entering grave details. The form includes fields for Main Location, SubLocation, Grave Reference, Additional Reference, Grant Ref, and Grave Notes. It also has tabs for General, Interments, Owner(s), Notes, Memorials, Stewing, Risk Assessment, Exhumation, and Finance. The 'General' tab is selected, showing fields for Grave Type, Denomination, Max Coffins, Max Ashes, Permit No, Private, Manual Dig, and Corroded.

The Grave Information record for the location will be displayed

Created with the Standard Edition of HelpNDoc: [Qt Help documentation made easy](#)

Search by Location

The screenshot shows the 'Search by Location' screen. The sidebar on the left contains a list of navigation options. The 'Graves' option is highlighted. The main area displays a form for entering search criteria, including Location, Search Type, and Search Date.

Select Interment from the Outlook bar on the left hand side
Select Graves from the expanded selection

Search for : Locations

General | **Location**

From Location: Rubicon Cemetery

Sub Location: ALL
Section A
Section B
Section C
Section D

Detailed Location: ALL
001
002
003
004

Start: 000 End: Clear Graves

Search New Clear

Imagery

The Search for Locations screen will be displayed

1. Ensure that the Location tab is selected
2. Select the required Cemetery, Section, and Grave Number (Detailed Location)
3. Click on the Search button

Select Grave

Rubicon Cemetery | Section A | 003

☐ Show Cemetery

Section A | 003

Owners:

Current	Mrs Kate Roman
Current	Mr Steve Roman

Burials:

Mr William Enrique Dann Coath	13/05/2004	1002	5ft
Mrs Maria Jean Coath	12/11/1999	895	7ft 6in

Disposal / Scattering:

Memorials:

Headstone and Markers	17/06/2005	31/12/9998
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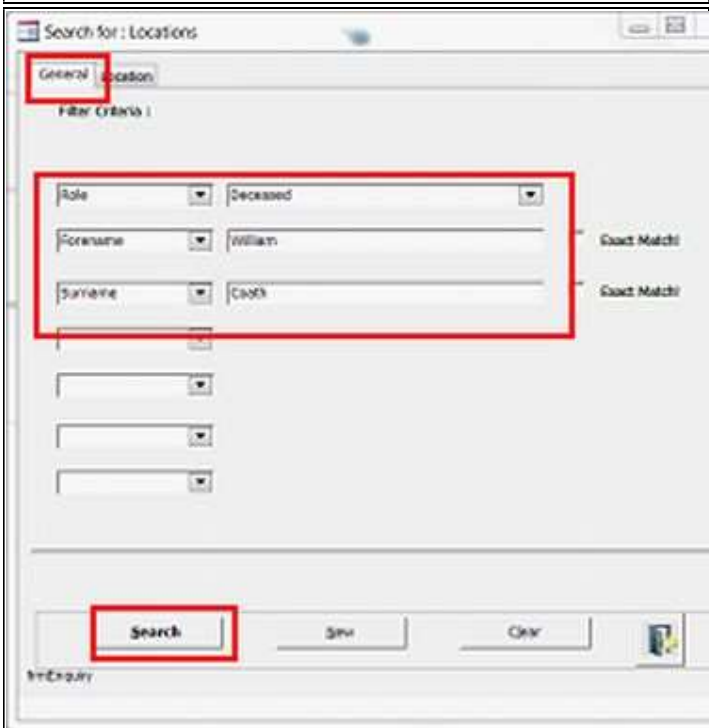
1 records match your selection
Item Selected Grave

Left sidebar menu: Clients, Cemetery, Diary, Finance, Memorial, Burial, Graves, Extensions, Locations, Mapping, Memorial, Output, Preferences, Setup

The Select Grave screen will be displayed with the grave highlighted.
Click on the Finger

The Grave Information record for the location will be displayed

Search by Owner or Deceased

	<p>Select Interment from the Outlook bar on the left hand side</p> <p>Select Graves from the expanded selection</p>
	<p>The Search for Locations screen will be displayed</p> <p>Ensure that the General tab is selected</p> <p>To search by Deceased ensure that Role Deceased is selected and enter Forename and Surname of deceased</p> <p>Click on the Search button</p> <p>To search by Grave Owner ensure that Role Grave Owner is selected and enter Forename and Surname of the Grave Owner</p> <p>Click on the Search button</p>

Select Grave

Rubican Cemetery/Section A/003

☐ Show Cemetery

Section A/003

Owners:

Current: Mrs Kate Roman

Current: Mr Steve Roman

Burials:

Mr William Enrique Dann Coath	13/05/2004	1002	5ft
Mrs Mera Jean Coath	12/11/1993	1002	7ft 6in

Disposal / Scattering:

Memorials:

Headstone and Karts	17/06/2005	31/12/9999
---------------------	------------	------------

1 records match your selection

ItemSelectedGrave

The Select Grave screen will be displayed with the grave highlighted

Click on the Finger

Grave Information

Bacas ID: 755

Main Location: Rubican Cemetery

SubLocation: Section A

Grave Reference: 003

Additional Reference:

Grant Ref: 0

Grave Notes: changement de part

General | Interments | Owner(s) | Notes | Memorials | Stewing | Risk Assessment | Exhumation | Finance

Grave Type: Traditional Grave

Denomination: Church of England

Max Coffins: 3

Max Ashes: 4

Permit No: 0

Private: ☐

Manual Dig: ☐

Connected: ☐

Head width:

Shoulder width:

Feet width:

Length:

Depth:

ItemGraveInfo

The Grave Information record for the location will be displayed

Created with the Standard Edition of HelpNDoc: [Free Web Help generator](#)

To Mark A grave Owner as Dead

Grave Information

Bacas ID: 1011

Main Location: Rubican Cemetery

SubLocation: Section G

Grave Reference: 641

Additional Reference: A

Grant Ref: 120

Grave Notes:

General | Interments | **Owner(s)** | Notes | Memorials | Stewing | Risk Assessment | Exhumation | Finance

Contracts:

ID	Start	End	Status
671	18/02/2014	17/02/2044	Current

Owners:

Forename	Surname
Mr	Bill Leman

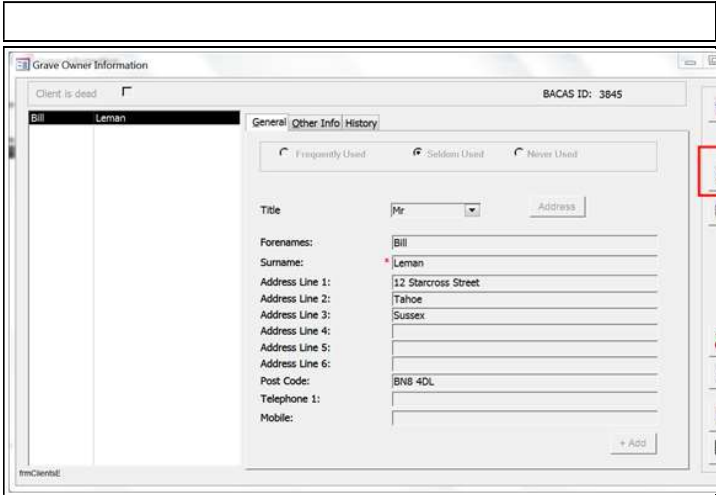
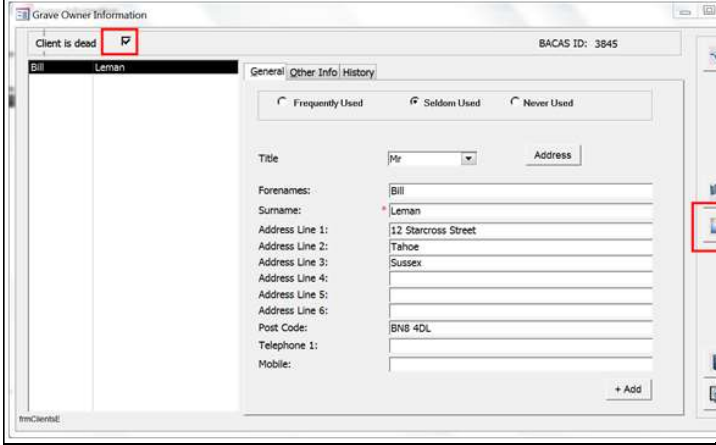
ItemGraveInfo

Open the *Grave Information Screen* for the Grave. (Use one of the following links for instruction on how to do this) ([Search for a Grave by Location](#), or [Search for a Grave by Grave Owner/Deceased](#), or [Search for a Grave by Grant Number/Burial Number](#))

Select the **Owner(s)** Tab

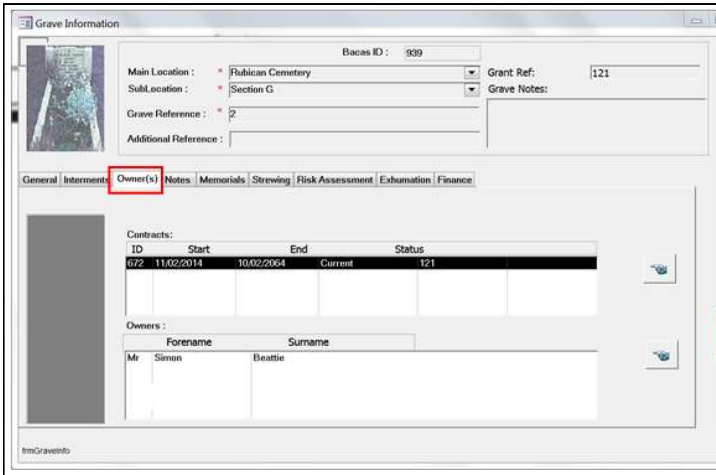
Ensure that *Current* Contract is selected

Select the correct *Owner*

	<p>Click on bottom Finger</p> <p>The <i>Grave Owner Information</i> screen will be displayed with the details of the owner Click on the Edit pencil</p>
	<p>Click on the <i>Client is dead</i> marker Click on Save Click on the Exit button</p>

Created with the Standard Edition of HelpNDoc: [Free help authoring environment](#)

To Print Deed Documents

	<p>Open the <i>Grave Information</i> Screen for the Grave. (Use one of the following links for instruction on how to do this) (Search for a Grave by Location, or Search for a Grave by Grant Number/Burial Number) Select the Owner(s) Tab The contract details for the grave will be displayed. Click on the Printer button</p>
---	---

Report List

Reports

Report Category: [dropdown]
Batch Category: Grave

Reports

- ☐ Assent Of Executor
- ☒ Deed of Grant
- ☐ Renunciation
- ☐ Statutory Declaration
- ☐ Deed Covering letter
- ☐ Deed Transfer Covering Letter
- ☐ Deed Of Grant - Assignment
- ☐ Deed of Grant - Reserve
- ☐ Deed Of Grant - Transfer

Select all Clear all

Cancel Next

frmReportList

The *Report List* will open
Select the *document required* by ticking in the box adjacent to it
Click on **Next**

Report List

Parameters

Date: [12/02/2014]

Email: [text box]

Cancel Preview ☐ **Print** Email

frmReportList

A second *Report List* screen will open
Click on **Print**
The deed document will be printed

The screenshot shows the 'Grave Information' window. The 'Finance' tab is highlighted in the top navigation bar. The main area contains a large empty box for 'Payee' and a list of buttons on the right: 'Invoice', 'Add Item', 'Add Manual Item', 'Receipt', 'Receipt Items', and 'Delete Item'. The 'Receipt Items' button is highlighted with a red box.

Open the *Grave Information Screen* for the Grave. (Use one of the following links for instruction on how to do this) ([Search for a Grave by Location](#), or [Search for a Grave by Grave Owner/Deceased](#), or [Search for a Grave by Grant Number/Burial Number](#))
Select the **Finance** Tab
Click on the **Edit** pencil

This screenshot is identical to the previous one, but the 'Receipt Items' button in the right-hand menu is highlighted with a red box.

1. Click on the **Receipt Items** button

The screenshot shows the 'Create New Receipt' window. The 'Payee' field is populated with 'Simon Beattie' and '56 Baker Street'. The 'Select Other Payee' button is highlighted with a red box. Below this, there are fields for 'Receipt Date' (Thu 13/02/14), 'Type of Payment', 'Payment Reference', 'Comments', 'Organization' (Tahoe Bereavement Services), 'Currency' (Sterling), 'Account Code', 'Description', 'Amount', 'VAT', 'Total', 'Calc Gross VAT', 'Calc Net VAT', 'Location', and 'BACASID' (947). At the bottom, there is a 'Receipt Items' table with 'Add Item' and 'Delete Item' buttons.

The *Create New Receipt* screen will open

1. Click on **Select Other Payee**

Search for : Clients

General

Filter Criteria :

Role: Grave Owner

Forename: Simon

Surname: Beattie

Exact Match!

Exact Match!

Address:

Postcode:

Search

New

Clear

frm:enquiry

A *Search for Clients* screen will open

1. Select *Role: Grave Owner*
2. Enter the Forename and Surname of the grave owner
3. Click on **Search**

Grave Owner Information

Client is dead: ☒

BACAS ID: 2846

Simon Beattie

General Other Info History

Frequently Used Seldom Used Never Used

Title: Mr

Address:

Forenames: Simon

Surname: Beattie

Address Line 1: 56 Baker Street,

Address Line 2: Tahoe,

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code:

Telephone 1:

Mobile:

+ Add

frmClientInf

The *Grave Owner Information* Screen for the Grave owner will open

1. Ensure that the grave owner is selected
2. Click on the **Finger**

To Transfer Ownership of a Grave

Grave Information

Bacas ID : 947

Main Location : Rubican Cemetery

Sub Location : Section E

Grave Reference : 47

Grant Ref: 75

Grave Notes:

General | Interments | **Owner(s)** | Notes | Memorials | Strewing | Risk Assessment | Exhumation | Finance

Contracts:

ID	Start	End	Current	Status
553	23/05/2007	22/05/2007	Current	75

Owners:

Forename	Surname
Mrs. Teresa	Benfield

frmGraveInfo

Open the *Grave Information Screen* for the Grave. (Use one of the following links for instruction on how to do this) ([Search for a Grave by Location](#), or [Search for a Grave by Grave Owner/Deceased](#), or [Search for a Grave by Grant Number/Burial Number](#))

1. Select the **Owner(s)** Tab
2. Ensure that the current contract is selected
3. Click on the **Edit** pencil

Grave Information

Bacas ID : 947

Main Location : Rubican Cemetery

Sub Location : Section E

Grave Reference : 47

Grant Ref: 75

Grave Notes:

General | Interments | Owner(s) | Notes | Memorials | Strewing | Risk Assessment | Exhumation | Finance

Contracts:

ID	Start	End	Current	Status
553	23/05/2007	22/05/2007	Current	75

Owners:

Forename	Surname
Mrs. Teresa	Benfield

frmGraveInfo

1. Click on the **New Contract** button

Grave Ownership Setup

This Grave has a current contract
Rubican Cemetery~Section E~47

if you wish to transfer ownership to a different person, then please indicate below the date you wish to end the present contract and how is to be tranfered.

Transfer Date: * 12/02/2014

Transfer Method: * Probate of Will (District Registry)

frmWizGraveTransfer

Exit

Next

Grave Ownership Set up screen will open

1. Enter the date of transfer of the contract. (the date the new contract should begin)
2. Select the method for the transfer of ownership
3. Click on **Next**

Grave Ownership Setup

Please indicate:

- whether grave Rubican Cemetery~Section E~47 is to be Purchased, or Reserved Purchase
- What is the Purchased or Reserved Period
- What amount is to be paid

Purchase Type

☒ Purchased

☐ Reserved

Purchase Period and Amount Paid

From Date: 12/02/2014 To Date: 22/05/2057 Calculate

Amount: 1000 Grant No: 75 Next Grant

Tax 1: 0 Suffix:

Tax 2: 0 Purchase Reg. No:

Total Paid: £1,000.00 Suffix:

frmWizGraveTerm Exit Previous **Next**

A second *Grave Ownership Setup* screen will open

1. Select the *Purchased type*
2. Check that the *Contract Start Date* is correct – This will default to today's date – it is likely that you will need to amend this
3. *End Date*: For a Transfer of Exclusive Rights of Burial the *End Date* will usually remain as the end date for the original contract
4. *Amount*: For a Transfer of Exclusive Rights of Burial the *Amount* will usually remain as the *Amount* for the original contract (Any transfer fee should be added under the finance tab for the grave)
5. Grant number: For a Transfer of Exclusive Rights of Burial the *Grant Number* will usually remain the same as for the original contract
6. Click on the **Next**

Grave Owner Setup

Please enter the Owners name and address for Grave Rubican Cemetery~Section E

Title:

Forenames:

Surname:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

Address Line 5:

Address Line 6:

Post Code:

Telephone Number:

Mobile Number:

E-Mail:

Owner is dead ☐ Owner is Resident ☐

frmWizGraveOwner Exit Previous **Create**

The next screen will allow you to enter name and address for the (first) new Grave Owner

1. It is wise at this stage to search to see if the owner already exists on the System (for example as an existing grave owner/memorial applicant or an applicant for an earlier funeral)
2. Click on **Select Owner**

Search for Clients

General

Filter Criteria :

Role: ALL

Forename: Simon

Surname: Beattie

Exact Match!

Exact Match!

Address:

Postcode:

Search New Clear

The *Search for Clients* Screen will open

1. Select Role **All**
2. Enter the forename and Surname of the Grave Owner
3. Click on **Search**

Grave Owner Information

Client is dead: ☒

BACAS ID: 2846

Simon Beattie

General Other Info History

Frequently Used Seldom Used Never Used

Title: Mr Address:

Forenames: Simon

Surname: Beattie

Address Line 1: 56 Baker Street,

Address Line 2: Tahoe,

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code:

Telephone 1:

Mobile:

+ Add

frmClientBE

If the Grave Owner already exists in BACAS the *Client Information* screen will display the Grave Owner

1. Click on the **Finger** to select the grave Owner and return to *Grave Ownership Setup*

Grave Owner Setup

Please enter the Owners name and address for Grave Rubican Cemetery~Section E

Title: Mr

Forenames: Simon

Surname: Beattie

Address Line 1: 56 Baker Street,

Address Line 2: Tahoe,

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code:

Telephone Number:

Mobile Number: 07865 312 456

E-Mail: beatie@googlemail.com

Owner is dead: ☐ Owner is Resident: ☒

Get Last Deceased Address

Get Last Applicant Details

Select Owner

Clear Owner

frmWizGraveOwner

Exit Previous Create

1. If the Grave Owner does not already exist on the system, click on the **Exit** button to return to *Grave Ownership Setup* and then enter his name and address manually
2. Click on **Clear Owner** at any stage to clear details and start again
3. Enter telephone number/mobile number for the grave owner
4. Enter an email address for the Grave Owner
5. Click on the **Create** button

The *Grave Contract* Screen will open. It will reflect the details of the new contract:

1. Click on the **Exit** button to return to the *Grave Information* record for the deceased.

The *Grave Information* screen will display details of the cancelled contract and also details of the current contract, showing the new grave owner. Click on the **Save** Button

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Exhumation




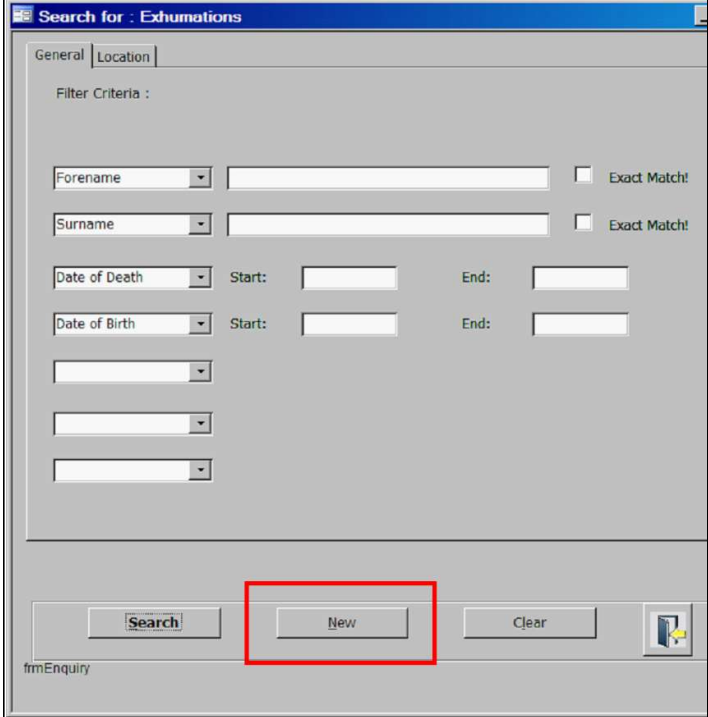


Exhumations

- [Search for an existing exhumation](#)
- [Exhume a deceased](#)
- [Print an Exhumation Order Digging Slip](#)

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Exhume a deceased

<div> <div> Clients Cremation Diary Finance Generate Interment </div> <div>  Burial  Graves  Exhumations </div> <div> Locations Mapping Memorial Output Preferences Setup </div> </div>	<p>Select Interment from the <i>Outlook bar</i> on the left hand side.</p> <p>Select Exhumations from the expanded selection.</p>
	<p>The <i>Search for Exhumations</i> screen will be displayed</p> <p>Click on the New button</p>

Search for : Locations

General Location

Type : All

Main Location: Rubican Cemetery

Sub Location: ALL
Section A
Section B
Section C
Section D

Detail Location: ALL
001
002
003
004

Start 003 End

Clear Graves

Search New Clear

frmEnquiry

The *Search for: Locations* screen will be displayed
Select the grave where the deceased is interred and then click on **Search**

The screenshot shows the National Cemetery Section A Web site. The page has a header with the title "National Cemetery Section A Web" and a navigation bar with links like "Home", "About", "Contact", "Privacy", "Security", and "Accessibility". The main content area is titled "Section 801" and contains a search bar and a list of search results. The right sidebar contains additional information, including a "Search" section with a search bar and a "Results" section with a list of results. The bottom of the page features a footer with links to "Home", "About", "Contact", "Privacy", "Security", and "Accessibility".

The *Select Grave* Screen will be displayed
Select the grave by clicking on the **Finger**

Grave Owner Information

Client to check ☐

Grave Owner Information

BACAS ID: 2502

Name Surname General grave info Previous Addresses

Property owned Buried here Buried here

Title Mrs

Forename(s)

Surname

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Address Line 6

Post Code

Telephone 1

Mobile

Name

Surname

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Address Line 6

Post Code

Telephone 1

Mobile

Grave Number

Burial Date

Burial Time

Previous Address

Previous Address

GraveMaster

The *Grave Information* Screen will be displayed
Click on the **Pencil** to put the screen in Edit mode

Grave Information

Bacas ID : 755

Main Location : Rubican Cemetery

SubLocation : Section A

Grave Reference : 003

Additional Reference :

Grant Ref: 3

Grave Notes: changement de part

General | **Interments** | Owner(s) | Notes | Memorials | Strewing | Risk Assessment | Exhumation | Finance

Interments:

Pos.	Forenames	Surname	Burial Date	Container
1	Mora Jean	Coath	12/11/1939	
2	William Enrique Dann	Coath	13/05/2004	

Auto Number Positions

frmGraveInfo

Select the **Interment tab** and then the **deceased to be exhumed**
Click on the **Exhume** button

Exhumation Wizard

Exhumation of : William Enrique Dann Coath

from : Rubican Cemetery-Section A-003

Please provide Exhumation details

Date of Exhumation : 09/05/2012

Permission given by : Faculty and Home Office License

License Number : 789567

Date of License : 05/05/2012

frmWizExhumation1

Exit

Next

The *Exhumation Wizard* Screen will be displayed
Complete the Dates, Permission given by and License Number and click on the **Next** button

ExhumationWizard

Exhumation of : William Enrique Dann Coath

from : Rubican Cemetery-Section A-003

Please provide Disposal information

Type of Disposal : Re-interred by Same Authority

Date of Disposal : 09/05/2012

Diocese :

Location : Section B 004

Remarks : Family request

frmWizExhumation2

Exit

Previous

Exhume

Complete disposal details and click on the **Exhume** button

Grave Information

Bacas ID: 755

Main Location: Rubican Cemetery
 SubLocation: Section A
 Grave Reference: 003
 Additional Reference:

Grant Ref: 3
 Grave Notes: changement de part

General Interments Owner(s) Notes Memorials Stewing Risk Assessment Exhumation Finance

Interments: View New Delete Exhume

Pos.	Forenames	Surname	Burial Date	Container
1	Moire Jean	Coeth	12/11/1988	

Auto Number Positions

frmGraveInfo

The *Grave Information* screen will be displayed. The deceased will no longer be displayed as being in the grave. Click on the **Save** button

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Print an Exhumation Order Digging Slip

Clients
Cremation
Diary
Finance
Generate
Interment

Burial

Graves

Exhumations
Locations
Mapping
Memorial
Output
Preferences
Setup

Select Interment from the Outlook bar on the left hand side. Select Exhumations from the expanded selection.

Search for : Exhumations

General | Location

Filter Criteria :

Forename: Trevor ☐ Exact Match!

Surname: Harrison ☐ Exact Match!

Date of Death: Start: End:

Date of Birth: Start: End:

Search New Clear

frmEnquiry

The Search for Exhumations screen will be displayed
Enter the Forename and Surname of the exhumed deceased and click on the Search button

BACASNG - (BACAS)

File Query Generation Query Generate Information Locations Mapping Memorial Output Preferences Setup

Exhumation - Select Deceased

Deceased: 14 Trevor Harrison

Location: 61 Bone Lane, Tisbury, Wiltshire

Post Code: BA6 8YH

Age: 68

Death: 09/01/2007

Exhumation: 09/01/2007 13:30

Print

The Exhumation - Select Deceased screen will be displayed
Click on the Finger

Exhumation

General | Exhumation Details

Exhumation No.: 3

Exhumation Date: 09/01/2007 Booked By: Martin Canton

Exhumation Time: 13:30 Booked On: 08/01/2007

Deceased: 14

Title: Mr

Forenames: Trevor

Surname: Harrison

Address Line 1: 61 Bone Lane

Address Line 2: Tisbury

Address Line 3: Wiltshire

Address Line 4:

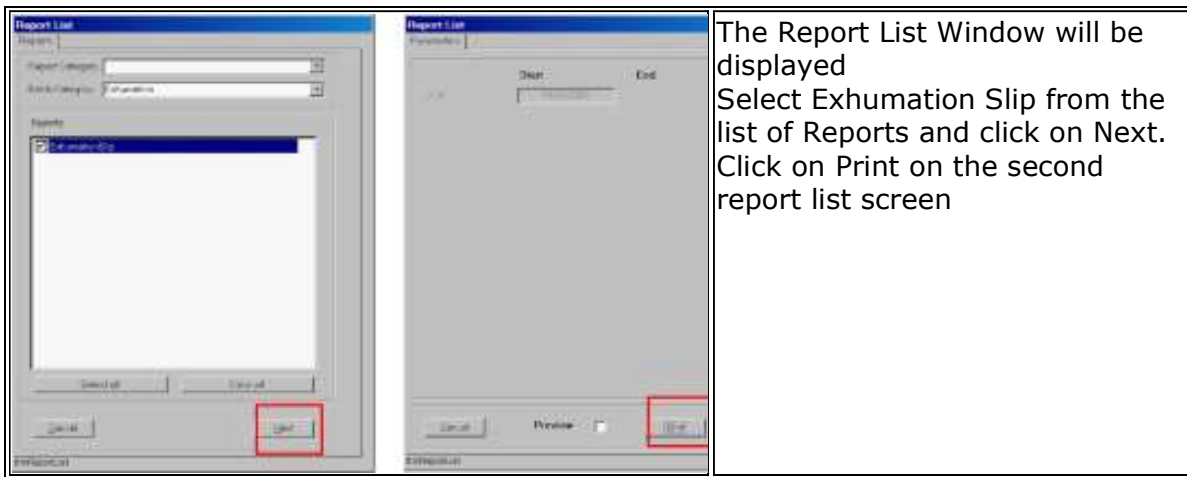
Address Line 5:

Address Line 6:

Post Code: BA6 8YH

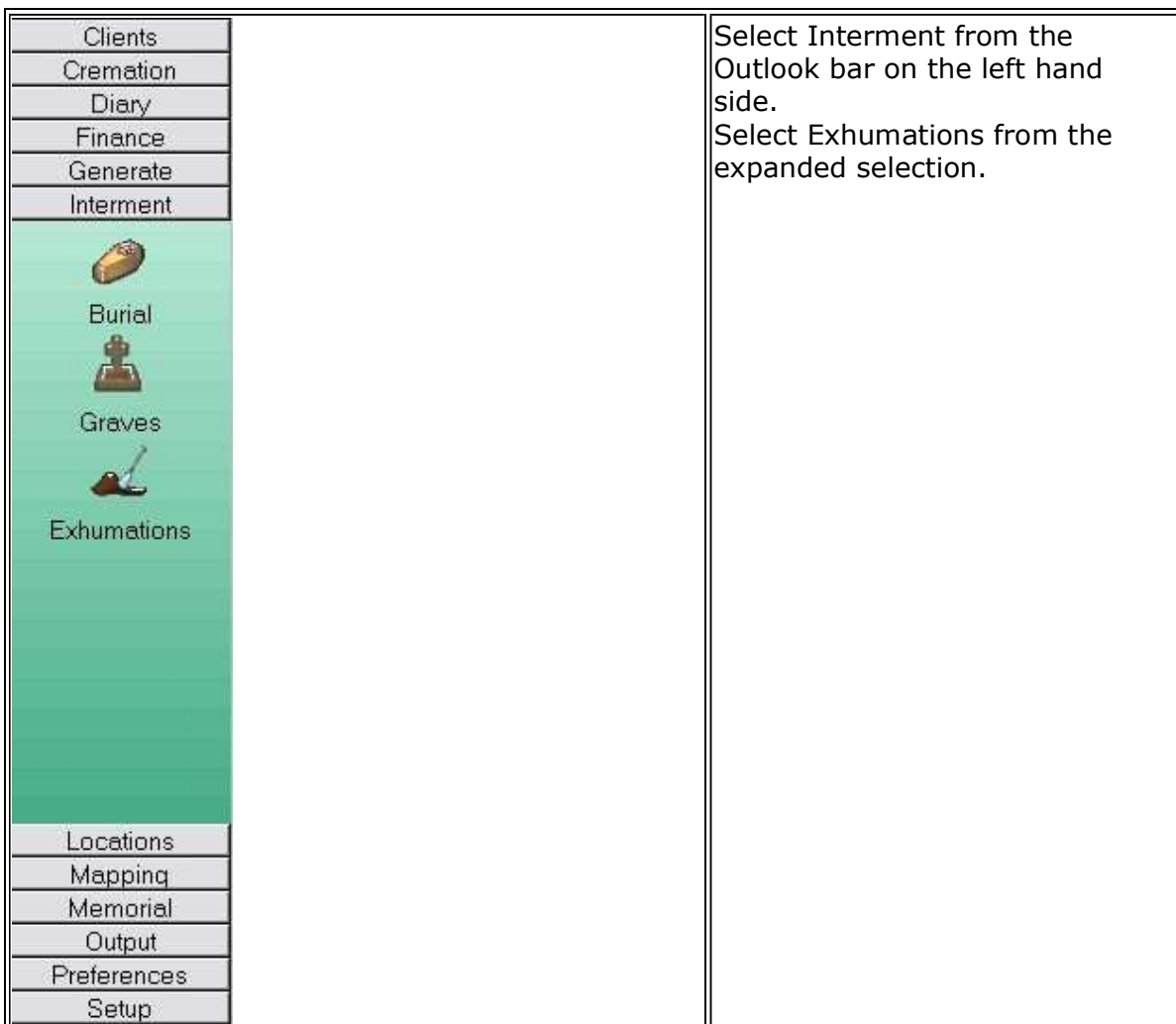
Print

The Exhumation record for the deceased will be displayed.
Click on the Printer button




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Search for an existing exhumation



The Exhumation - Select
Deceased screen will be
displayed
Click on the Finger

The screenshot shows the BACASING - [BACAS] application window. The title bar indicates the application name. The menu bar includes options like File, Clients, Cemetery, Diary, Database, Generate, Import/Export, Location, Mapping, Personal, Output, Preferences, Setup, and Tools. The sidebar on the left contains a tree view with the following items: Client, Cemetery, Diary, Database, Generate, Import/Export, Exhumation (highlighted in green), Mapping, Personal, Output, Preferences, Setup, and Tools. The main window is titled 'Exhumation - Select Deceased'. It features a table with columns for ID, Name, and Address. A red box highlights a button in the top right corner. The table contains one row with the following data: ID: 00000001, Name: [blank], Address: [blank]. Below the table, there are fields for Exhumation Code, Age, and Teeth. The Exhumation Code field contains the value 00000001. The Age field contains the value 11.36. The Teeth field is empty.



Exhumation

General | **Exhumation Details**

Exhumation No. :

Exhumation Date : Booked By :

Exhumation Time : Booked On :

Decceased :

Title :

Forenames :

Surname :

Address Line 1 :

Address Line 2 :


Address Line 3 :

Address Line 4 :

Address Line 5 :

Address Line 6 :

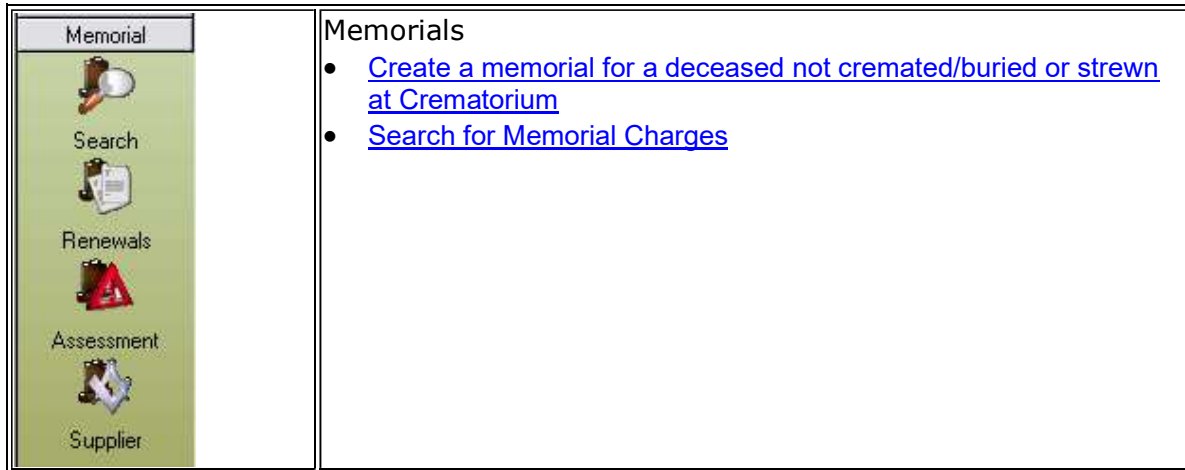
Post Code :



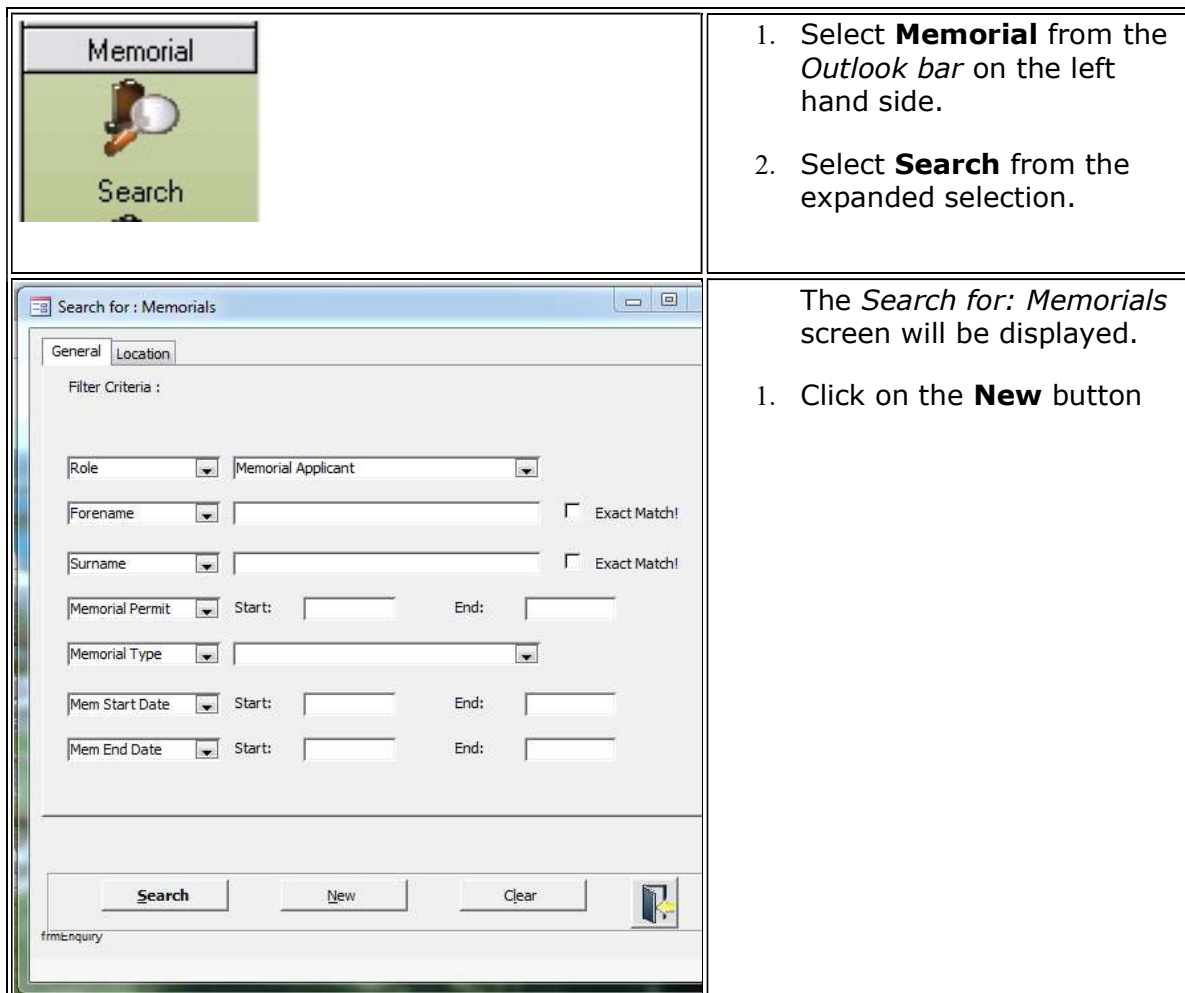
InExhumation

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Memorial



How to create a memorial only



1. Complete the *General information* and *Applicant* tabs as normal and **Save**
2. To complete the *Deceased* tab, Click on the **Edit Pencil** and then the **Select Deceased** button.

The *Search for: Deceased* screen will open

1. Click on the **New** button


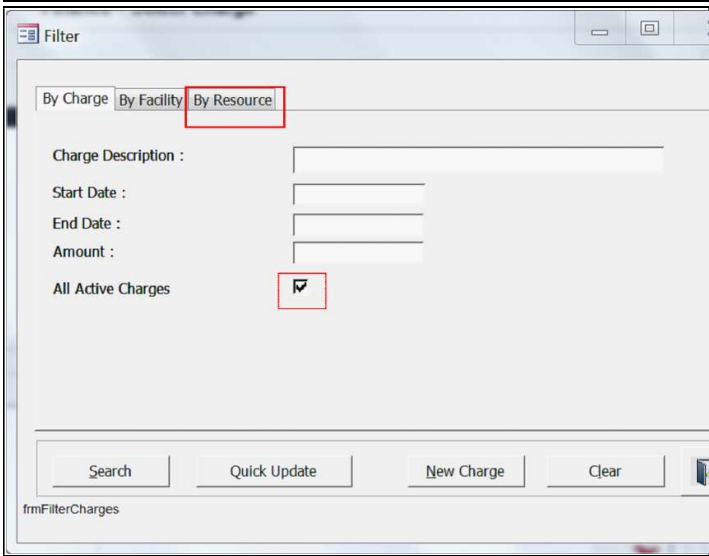
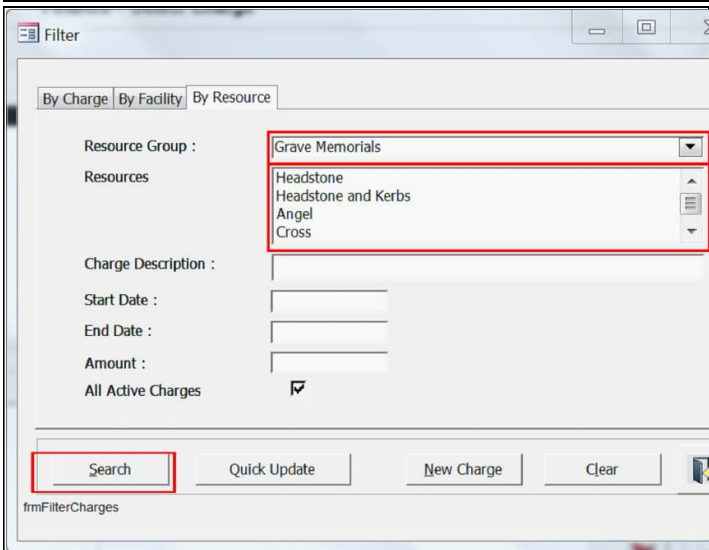
The *Deceased Information* screen will open

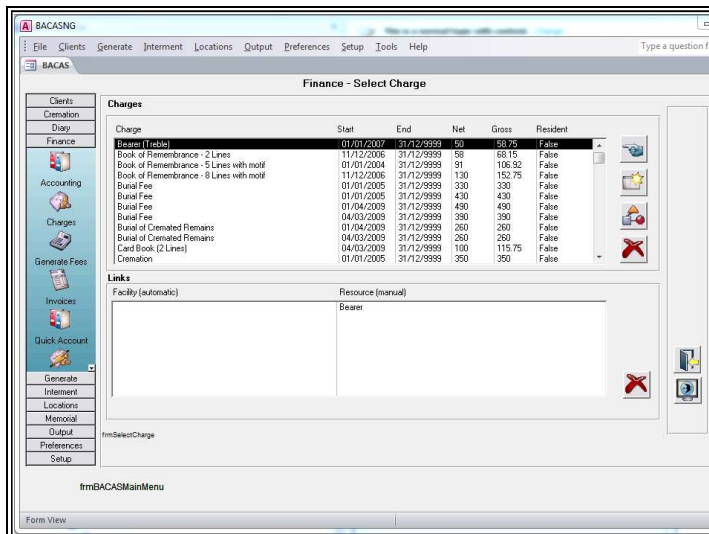
1. Type in the details of the deceased whose remains are held elsewhere and click on the **Save** button
2. Click on the **Pointing Finger** and then the **Close** button

You will be returned to the *Memorial Information* screen and will see that the deceased is now recorded.

3. Complete the remaining tabs as normal

Search for Memorial Charges




	<ol style="list-style-type: none"> 1. Select Finance from the <i>Outlook bar</i> on the left hand side. 2. Select Charges from the expanded selection.
	<p>The <i>Filter</i> screen will be displayed.</p> <ol style="list-style-type: none"> 1. Tick the <i>All Active Charges</i> box 2. Click on the By Resource tab
	<ol style="list-style-type: none"> 1. Chose the appropriate memorial Group from the drop down selection A list of the memorials in this group will be displayed adjacent to <i>Resources</i> 2. Click on the Search button



A list of memorial charges will be displayed.

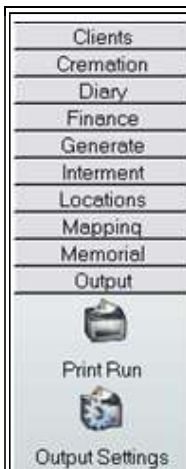
Created with the Standard Edition of HelpNDoc: Full-featured multi-format Help generator

Output

<p>Output</p>  <p>Print Run</p>	<p>Print Run</p> <ul style="list-style-type: none"> • To set up a Management report in BACAS • Print A list of Account Codes • How to print an invoice checklist • How to print a filtered charge report • To Print the FBCA Annual Federation Report • How to reprint a range of invoices • To print the Cremation Register
 <p>Output Settings</p>	<p>Output Settings</p> <ul style="list-style-type: none"> • How to set up a management report • Amend Number of Copies Printed • Amend the Orientation of a report
 <p>Variation Order</p>	<p>Variation Orders</p> <ul style="list-style-type: none"> • Create a variation Order • Search for a variation order

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Amend the number of copies printed



Select **Output** from the Outlook bar on the left hand side.
Select **Output Settings** from the expanded selection.

1. A list of all reports set up in BACAS will be displayed.
2. Scroll down the report list on the left hand side until you find the report in question.
3. Click on this entry on the left hand side to select it.
4. If you have selected the correct report, the entry in the *Report Name* (highlighted by green box) will reflect the option from report list you would select when running the report)

Click on the **Edit** button

BACAS ID: 63

Report Parameters

CremDisposalSummary
Deed of Grant
Digging Slip
EnquiryReportDeceasedPortrait
Exhumation Order
Floral Tributes
Form10(I)
Invoice
Invoice
Invoice
Mapping
Memorial Certificate Niche
Memorial Renewal
Memorial Renewal Letter
MemorialRoseLetter
MemorialSalesRenewalsStats
Operator Work Sheet
PartC-Vertical02
PurchaseRegisterGrantRange04Landscape
Receipt
ReceiptList02-MainLocationSplit
ReceiptList02-MainLocationSplit
SaturdayServiceList02
Services for a Period
TemporaryDepositList01
Variation Order
FormDisposalSummary

Report File: * VODig.rpt
copy settings Browse

Report Name: * Variation Order
Category: Individual
Batch Category: VO Number

No of Copies: 3

Paper Type: Plain A4
Paper Size: A4
Orientation: Portrait
Paper Source: Auto
Print Duplex: Default
Report Language: Crystal Report
Security Level: Enquiry

Import Reports Export Reports

Enter the number of copies of the report required in the *Number of Copies* field
Click on **Save**

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Amend the orientation of a report

Clients
Cremation
Diary
Finance
Generate
Interment
Locations
Mapping
Memorial
Output
Print Run
Output Settings

BACAS ID: 63

Report Parameters

CremDisposalSummary
Deed of Grant
Digging Slip
EnquiryReportDeceasedPortrait
Exhumation Order
Floral Tributes
Form10(I)
Invoice
Invoice
Invoice
Mapping
Memorial Certificate Niche
Memorial Renewal
Memorial Renewal Letter
MemorialRoseLetter
MemorialSalesRenewalsStats
Operator Work Sheet
PartC-Vertical02
PurchaseRegisterGrantRange04Landscape
Receipt
ReceiptList02-MainLocationSplit
ReceiptList02-MainLocationSplit
SaturdayServiceList02
Services for a Period
TemporaryDepositList01
Variation Order
FormDisposalSummary

Report File: * VODig.rpt
copy settings Browse

Report Name: * Variation Order
Category: Individual
Batch Category: VO Number

No of Copies: 1

Paper Type: Plain A4
Paper Size: A4
Orientation: Portrait
Paper Source: Auto
Print Duplex: Default
Report Language: Crystal Report
Security Level: Enquiry

Import Reports Export Reports

Select **Output** from the Outlook bar on the left hand side.
Select **Output Settings** from the expanded selection.

- A list of all reports set up in BACAS will be displayed.
- Scroll down the report list on the left hand side until you find the report in question.
- Click on this entry on the left hand side to select it.
- If you have selected the correct report, the entry in the *Report Name* (highlighted by green box) will reflect the option from report list you would select when running the report)

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<p>BACAS ID: 63</p> <p>Report Parameters</p> <p>Report File: * VODig.rpt copy settings Browse</p> <p>Report Name: * Variation Order</p> <p>Category: Individual</p> <p>Batch Category: VO Number</p> <p>No of Copies: 1</p> <p>Paper Type: Plain A4</p> <p>Paper Size: A4</p> <p>Orientation: Portrait</p> <p>Paper Source: Auto</p> <p>Print Duplex: Default</p> <p>Report Language: Crystal Report</p> <p>Security Level: Enquiry</p> <p>Import Reports Export Reports</p>	<p>Click on the Edit button</p>
<p>BACAS ID: 63</p> <p>Report Parameters</p> <p>Report File: * VODig.rpt copy settings Browse</p> <p>Report Name: * Variation Order</p> <p>Category: Individual</p> <p>Batch Category: VO Number</p> <p>No of Copies: 3</p> <p>Paper Type: Plain A4</p> <p>Paper Size: A4</p> <p>Orientation: Portrait</p> <p>Paper Source: Auto</p> <p>Print Duplex: Default</p> <p>Report Language: Crystal Report</p> <p>Security Level: Enquiry</p> <p>Import Reports Export Reports</p>	<p>Select the orientation required in the <i>Orientation</i> field</p> <p>Click on Save</p>

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How to set up a Management report

<p>Clients</p> <p>Cremation</p> <p>Diary</p> <p>Finance</p> <p>Generate</p> <p>Interment</p> <p>Locations</p> <p>Mapping</p> <p>Memorial</p> <p>Output</p> <p>Print Run</p> <p>Output Settings</p>	<ol style="list-style-type: none"> 1. Select Output from the Outlook bar on the left hand side. 2. Select Output Settings from the expanded selection. <p>A list of existing reports will be displayed.</p>
--	---

BACAS ID: 56

Report Parameters

Report File: * Applicant Letter - Redbridge.rpt
copy settings Browse

Report Name: * Applicant Letter

Category: Appointment

Batch Category:

No of Copies: 1

Paper Type: Headed A4

Paper Size: Default

Orientation: Default

Paper Source: Auto

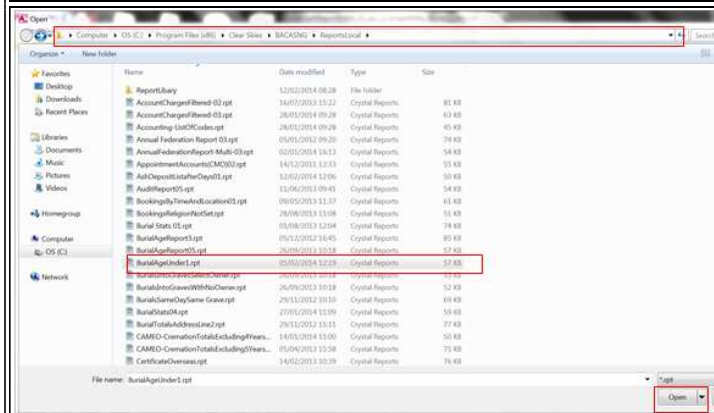
Print Duplex: Default

Report Language: Crystal Report

Security Level: Enquiry

Import Reports Export Reports

1. Click on the **New Report (star)** button.
2. Click on the **Browse** button



An *Open* screen will be displayed

1. Follow the path to the BACASNG report folder
2. Select the report you wish set up in BACASNG
3. Click on the **Open** button

BACAS ID:

Report Parameters

Report File: * BurialAgeUnder1.rpt
copy settings Browse

Report Name: * BurialAgeUnder1

Category: Management

Batch Category:

No of Copies: 1

Paper Type: A4

Paper Size: Default

Orientation: Default

Paper Source: Auto

Print Duplex: Default

Report Language: Crystal Report

Security Level: Enquiry

Import Reports Export Reports

You will be returned to *Report Setup*

1. Select *Category:* **Management** from the selection list
2. Enter **A4** as the *Paper Type*
3. Click on **Save**
- 4.

BACAS ID: 78

Report Parameters

Applicant Letter
AshDepositListafterDays01
Assent Of Executor
Box Stickers
BurialAgeUnder1
Burials by Type of Grave
Chapel List
Cremation Card
Cremation Card
Cremation Card
Cremation Register
Deed Covering letter
Deed of Grant
Deed Of Grant - Assignment
Deed Of Grant - Reserve
Deed Of Grant - Transfer
Deed Transfer Covering Letter
Digging Slip
Digging Slip - Argyll and Bute
EnquiryReportDeceasedPortrait
Exhumation Order
Floral Tributes
InternetBookingsFiguresByMonth01
Invoice
Invoice
Invoice

fmReportSetup

Read From Report

Remove

Parameter

Name

Parameter Type

ID Type

Allow Crystal Prompts

Clear

+ Add

1. Click on the *Parameters* tab
2. Click on the **Edit** pencil

BACAS ID: 78

Report Parameters

Applicant Letter
AshDepositListafterDays01
Assent Of Executor
Box Stickers
BurialAgeUnder1
Burials by Type of Grave
Chapel List
Cremation Card
Cremation Card
Cremation Card
Cremation Register
Deed Covering letter
Deed of Grant
Deed Of Grant - Assignment
Deed Of Grant - Reserve
Deed Of Grant - Transfer
Deed Transfer Covering Letter
Digging Slip
Digging Slip - Argyll and Bute
EnquiryReportDeceasedPortrait
Exhumation Order
Floral Tributes
InternetBookingsFiguresByMonth01
Invoice
Invoice
Invoice

fmReportSetup

Read From Report

Remove

Parameter

Name

Parameter Type

ID Type

Allow Crystal Prompts

Clear

+ Add

1. Click on **Read from Report**

BACAS ID: 78

Report Parameters

Applicant Letter
AshDepositListafterDays01
Assent Of Executor
Box Stickers
BurialAgeUnder1
Burials by Type of Grave
Chapel List
Cremation Card
Cremation Card
Cremation Card
Cremation Register
Deed Covering letter
Deed of Grant
Deed Of Grant - Assignment
Deed Of Grant - Reserve
Deed Of Grant - Transfer
Deed Transfer Covering Letter
Digging Slip
Digging Slip - Argyll and Bute
EnquiryReportDeceasedPortrait
Exhumation Order
Floral Tributes
InternetBookingsFiguresByMonth01
Invoice
Invoice
Invoice

fmReportSetup

Read From Report

Remove

Parameter

Name

Parameter Type

ID Type

Allow Crystal Prompts

Clear

+ Add

StartDate
EndDate
TotalsDetails

The report parameters will appear

1. Click on StartDate

BACAS ID: 78

Report Parameters

Applicant Letter
AshDepositListafterDays01
Assent Of Executor
Box Stickers
BurialAgeUnder1
Burials by Type of Grave
Chapel List
Cremation Card
Cremation Card
Cremation Card
Cremation Register
Deed Covering letter
Deed of Grant
Deed Of Grant - Assignment
Deed of Grant - Reserve
Deed Of Grant - Transfer
Deed Transfer Covering Letter
Digging Slip
Digging Slip - Argyll and Bute
EnquiryReportDeceasedPortrait
Exhumation Order
Floral Tributes
InternetBookingsFiguresByMonth01
Invoice
Invoice
Invoice

StartDate
EndDate
TotalsDetails

Read From Report - Remove

Parameter

Name StartDate
Parameter Type Start Date
ID Type Date
Allow Crystal Prompts ☒

Clear + Add

ImmReportSetup

The parameter name will refresh in the lower half of the screen

1. Select *Parameter Type Start Date*
2. Select *ID type: Date*
3. Tick *Allow Crystal Prompts*
4. Click on **Add**

BACAS ID: 78

Report Parameters

Applicant Letter
AshDepositListafterDays01
Assent Of Executor
Box Stickers
BurialAgeUnder1
Burials by Type of Grave
Chapel List
Cremation Card
Cremation Card
Cremation Card
Cremation Register
Deed Covering letter
Deed of Grant
Deed Of Grant - Assignment
Deed of Grant - Reserve
Deed Of Grant - Transfer
Deed Transfer Covering Letter
Digging Slip
Digging Slip - Argyll and Bute
EnquiryReportDeceasedPortrait
Exhumation Order
Floral Tributes
InternetBookingsFiguresByMonth01
Invoice
Invoice
Invoice

StartDate
EndDate
TotalsDetails

Read From Report - Remove

Parameter

Name EndDate
Parameter Type End Date
ID Type Date
Allow Crystal Prompts ☒

Clear + Add

ImmReportSetup

1. Click on *EndDate*

The parameter name will refresh in the lower half of the screen

2. Select *Parameter Type End Date*
3. Select *ID type: Date*
4. Click on **Add**

BACAS ID: 78

Report Parameters

Applicant Letter
AshDepositListafterDays01
Assent Of Executor
Box Stickers
BurialAgeUnder1
Burials by Type of Grave
Chapel List
Cremation Card
Cremation Card
Cremation Card
Cremation Register
Deed Covering letter
Deed of Grant
Deed Of Grant - Assignment
Deed of Grant - Reserve
Deed Of Grant - Transfer
Deed Transfer Covering Letter
Digging Slip
Digging Slip - Argyll and Bute
EnquiryReportDeceasedPortrait
Exhumation Order
Floral Tributes
InternetBookingsFiguresByMonth01
Invoice
Invoice
Invoice

TotalsDetails
StartDate Start Date
EndDate End Date

Read From Report - Remove

Parameter

Name EndDate
Parameter Type End Date
ID Type Date
Allow Crystal Prompts ☒

Clear + Add

ImmReportSetup

The Date Parameters will now both be set up in the top box as below:

1. Click on **Save**

Report List

Reports

Report Category **Management**

Batch Category

Reports

- ☐ AshDepositListafterDays01
- ☒ BurialAgeUnder1
- ☐ InternetBookingsFiguresByMonth01
- ☐ Burials by Type of Grave
- ☐ Services for a Period

Select all Clear all

Cancel Next

frmReportList

You are now ready to run the report:

1. Select **Output** from the Outlook bar on the left hand side
2. Select **Print Run** from the expanded selection

The *Report List* will open

3. Select *Report category: Management*
4. Tick the management report that you wish to run
5. Click on **Next**

Report List		
Parameters		
	Start	End
Date:	01/01/2013	01/01/2104
<div>Email :</div>		
Cancel	Preview <input checked="" type="checkbox"/>	Print
Email		
frmReportList		

1. Enter a date range
2. Click on **Preview**
3. Click on **Print**

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How to print A list of Account Codes

	A filtered charge report will give you a list of all the current charges set up in BACASNG
<div> <div> Clients Cremation Diary Finance Generate Interment Locations Mapping Memorial Output Print Run </div> </div>	<ol style="list-style-type: none"> 1. Select Output from the Outlook bar on the left hand side. 2. Select Print Run from the expanded selection.

The *Report List* Window will be displayed.

1. Select **Accounting** as the *Report Category*.
2. Select *Accounting List of Codes* from the list of *Reports* and click on **Next**. (The report might also be listed as *List of codes filtered* etc)
3. Enter *Today's date* on the second report list window
4. Click on **Print**

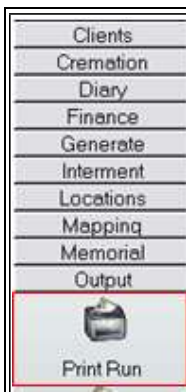
LIST - Accounting Interface Entries with an End Date from 23/04/2014 00:00:00

BACAS ID	Account ID	Start / End Date	Account Description Location	Amount	Acc. Tax 1 / 2	Resider Account
EROB	EROBH	01/04/2014 31/12/9999	Exclusive Rights (Homewood) Homewood Cemetery	0.00	0.00 0.00	False False
EROB	EROBMT	01/04/2014 31/12/9999	Exclusive Rights (Mount Tallac) Mount Tallac Crematorium	0.00	0.00 0.00	False False
EROB	EROBR	01/04/2014 31/12/9999	Exclusive Rights (Rubican) Rubican Cemetery	0.00	0.00 0.00	False False
INTER	INTERH	01/04/2014 31/12/9999	Interment (Homewood) Homewood Cemetery	0.00	0.00 0.00	False False
INTER	INTERMT	01/04/2014 31/12/9999	Interment (Mount Tallac Crematorium) Mount Tallac Crematorium	0.00	0.00 0.00	False False
INTER	INTERR	01/04/2014 31/12/9999	Interment (Rubican) Rubican Cemetery	0.00	0.00 0.00	False False
MEM01	MEM01H	01/04/2014 31/12/9999	Benches (Homewood) Homewood Cemetery	0.00	0.00 0.00	False False
MEM01	MEM01MT	01/04/2014 31/12/9999	Benches (Mount Tallac) Mount Tallac Crematorium	0.00	0.00 0.00	False False
MEM01	MEM01R	01/04/2014 31/12/9999	Benches (Rubican) Rubican Cemetery	0.00	0.00 0.00	False False

The list of codes will be printed:

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How to print an accounting report



Select **Output** from the Outlook bar on the left hand side.

Select **Print Run** from the expanded selection.

Report List

Reports

Report Category Accounting

Batch Category

Reports

☐ Appointment - Finance

☐ Invoices - reprint

☒ Invoices - Check List By Date

☐ Receipt List

Select all Clear all

Cancel Next

fmReportList

The *Report List* Window will be displayed. Select **Accounting** as the *Report Category*. A list of accounting reports set up on your system will be displayed. Select required report from the list of *Reports*. Click on **Next**.

Report List

Parameters

Date:

Start 01/04/2015 End 30/04/2015

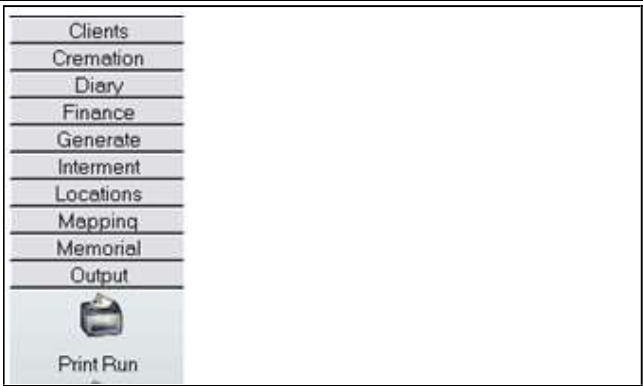
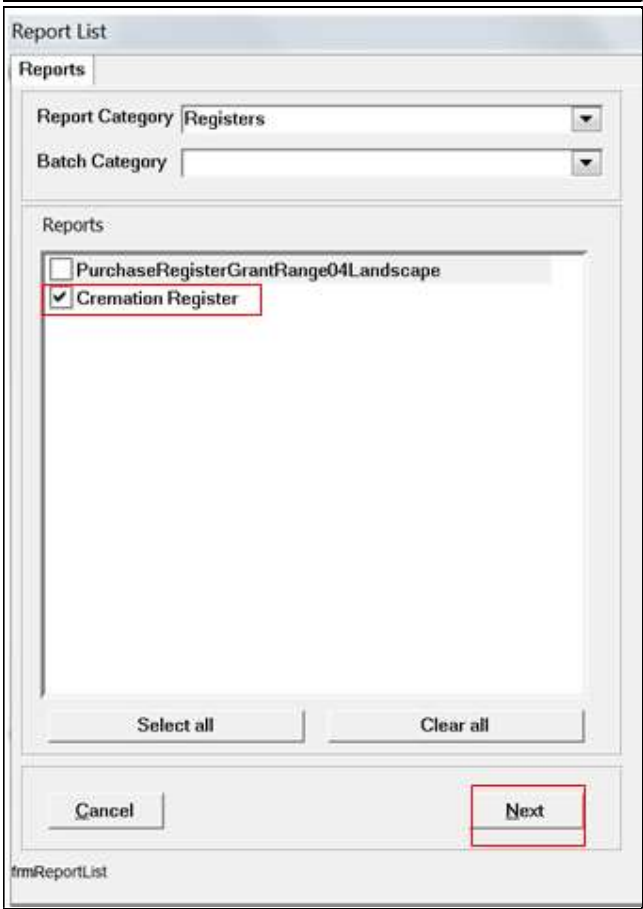
Email :

Cancel Preview ☒ Print Email

fmReportList

The information you are required to enter at the next stage will vary depending on the report selected. Below is an example of a report that requires dates for a financial period. (Other reports may require you to enter a first and last invoice or receipt number for the period.)

1. Enter the *Start Date* for the financial period
2. Enter *End Date* for the financial period
3. Tick *Preview* (if display to screen is required)
4. Click the **Print** button

	<p>Select Output from the Outlook bar on the left hand side.</p> <p>Select Print Run from the expanded selection</p>
	<p>The <i>Report List</i> Window will be displayed.</p> <p>Select Register as the <i>Report Category</i>.</p> <p>Select <i>Cremation Register</i> from the list of <i>Reports</i> and click on Next.</p>


Report List		
Parameters		
Date:	Start 01/01/2014	End 31/12/2014
Email :		
Cancel	Preview <input type="checkbox"/>	Print
Email		
frmReportList		

Enter **Start** and **End Dates** on the second report list window
Click on **Print**

The Cremation register will be printed

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How to Print Daily Paperwork

<div> <div>Clients</div> <div>Cremation</div> <div>Diary</div> <div>Finance</div> <div>Generate</div> <div>Interment</div> <div>Locations</div> <div>Mapping</div> <div>Memorial</div> <div>Output</div> <div>  </div> <div>Print Run</div> </div>	<p>Follow these notes to print the paperwork for a day. Such as a Chapel List, an Attendant List, an Operator Worksheet, the Cremation Authorities, Collect Certificates and Floral Tributes</p> <p>Select Output from the Outlook bar on the left hand side.</p> <p>Select Print Run from the expanded selection.</p>
---	--

Report List

Reports

Report Category: Appointment

Batch Category:

Reports

- ☐ Floral Tributes
- ☐ Applicant Letter
- ☐ PartC-Vertical02
- ☐ Box Stickers
- ☒ Chapel List
- ☒ Operator Work Sheet

Select all Clear all

Cancel Next

frmReportList

The *Report List* Window will be displayed

Select **Appointment** as the *Report Category*.

A list of daily reports set up on your system will be displayed

Tick to select the required report(s) from the list of *Reports*.


Click on **Next**.

Report List	
Parameters	
Date:	<div>Start</div> <div>21/04/2015</div> <div>End</div>
Email :	
<div>Cancel</div> <div>Preview <input type="checkbox"/></div> <div>Print</div> <div>Email</div>	
frmReportList	

The date will default to tomorrow's date – correct this if the paperwork for a different date is required
 Tick *Preview* (if display to screen is required)
 Click the **Print** button

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How to Print the FBCA Annual Federation Report

<div> <div>Clients</div> <div>Cremation</div> <div>Diary</div> <div>Finance</div> <div>Generate</div> <div>Interment</div> <div>Locations</div> <div>Mapping</div> <div>Memorial</div> <div>Output</div> <div>  </div> <div>Print Run</div> </div>	<ol style="list-style-type: none"> 1. Select Output from the Outlook bar on the left hand side. 2. Select Print Run from the expanded selection.
---	--

Report List

Reports

Report Category Management

Batch Category

Reports

- ☒ Annual Federation Report
- ☐ Cameo-CremationsAge1-4
- ☐ Cameo-CremationsAgeUnder1
- ☐ SaturdayServiceList02
- ☐ TemporaryDepositList01
- ☐ Burials by Type of Grave
- ☐ Services for a Period

Select all Clear all

Cancel Next

frmReportList

The *Report List* Window will be displayed


1. Select **Management** as the *Report Category*.
2. Select *Annual Federation* from the list of *Reports* and click on **Next**.

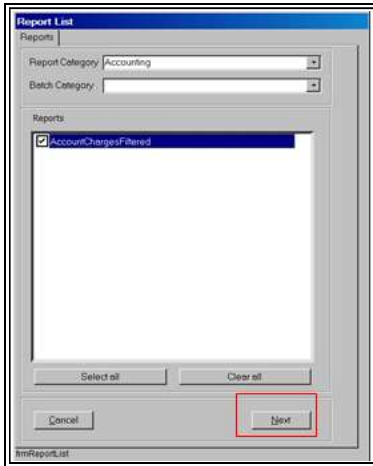
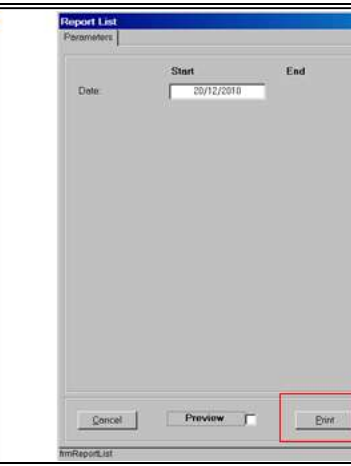
Report List	
Parameters	
Date:	<div>Start</div> <div>01/01/2014</div> <div>End</div> <div>31/12/2014</div>
Email :	<input type="text"/>
<div>Cancel</div> <div>Preview <input type="checkbox"/></div> <div>Print</div> <div>Email</div>	
frmReportList	

1. Enter **Start** and **End Dates** on the second report list window
2. Click on **Print**

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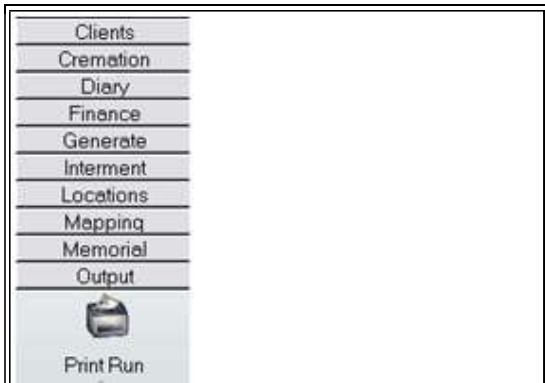
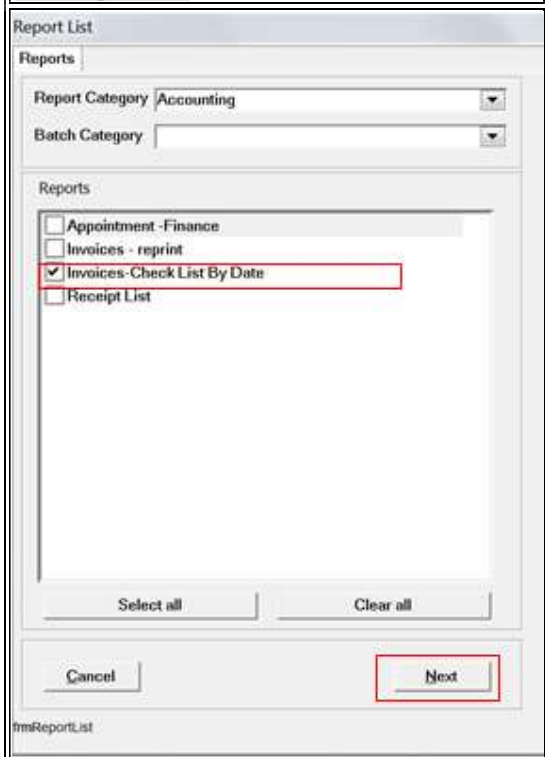
How to print a filtered charge report

<div> <div>Clients</div> <div>Cremation</div> <div>Diary</div> <div>Finance</div> <div>Generate</div> <div>Interment</div> <div>Locations</div> <div>Mapping</div> <div>Memorial</div> <div>Output</div> <div>  </div> <div>Print Run</div> </div>	<p>A filtered charge report will give you a list of all the current charges set up in BACASNG. Select Output from the Outlook bar on the left hand side.</p> <p>Select Print Run from the expanded selection.</p>
---	---

		<p>The <i>Report List</i> Window will be displayed.</p> <ol style="list-style-type: none"> 1. Select Accounting as the <i>Report Category</i>. 2. Select <i>Account Charges Filtered</i> from the list of <i>Reports</i> and click on Next. (The report might also be listed as <i>Set up Charges Filtered</i> or <i>Charges Filtered</i>) 3. Enter Today's date on the second report list window 4. Click on Print
---	---	--

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How to print an invoice checklist .


	<ol style="list-style-type: none"> 1. Select Output from the Outlook bar on the left hand side. 2. Select Print Run from the expanded selection.
	<p>The <i>Report List</i> Window will be displayed. Select Accounting as the <i>Report Category</i>. Select Invoice Checklist from the list of <i>Reports</i>. (The report might be listed under a slightly different name) Click on Next.</p>

Report List	
Parameters	
Date:	<div>Start</div> <div>01/04/2015</div>
	<div>End</div> <div>30/04/2015</div>
Email :	
<div>Cancel</div> <div>Preview <input checked="" type="checkbox"/></div> <div>Print</div> <div>Email</div>	
fmmReportList	

Enter the *Start Date* for the financial period
Enter the *End Date* for the financial period
Tick *Preview* (if display to screen is required)
Click the **Print** button

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How to Print a Management Report

<div> <div>Clients</div> <div>Cremation</div> <div>Diary</div> <div>Finance</div> <div>Generate</div> <div>Interment</div> <div>Locations</div> <div>Mapping</div> <div>Memorial</div> <div>Output</div> <div>  </div> <div>Print Run</div> </div>	<p>Select Output from the Outlook bar on the left hand side.</p> <p>Select Print Run from the expanded selection.</p>
---	---

Report List

Reports

Report Category **Management**

Batch Category

Reports

- ☐ Annual Federation Report
- ☐ Ashes on Temporary Deposit
- ☐ Ashes Stored for 30 Days
- ☐ Audit Report
- ☐ Burial Statistics
- ☐ Cremation Disposal Summary
- ☐ RegisterGaps01
- ☐ Burials by Type of Grave
- ☒ **Services for a Period**

Select all Clear all

Cancel **Next**

frmReportList

The *Report List* Window will be displayed.
 Select **Accounting** as the *Report Category*.
 A list of accounting reports set up on your system will be displayed
 Select required report from the list of *Reports*. Click on **Next**.

Report List

Parameters

	Start	End
Date:	01/01/2014	31/12/2014

Email :

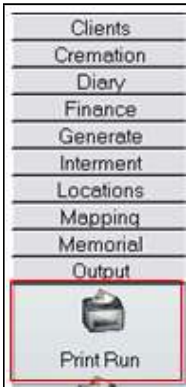
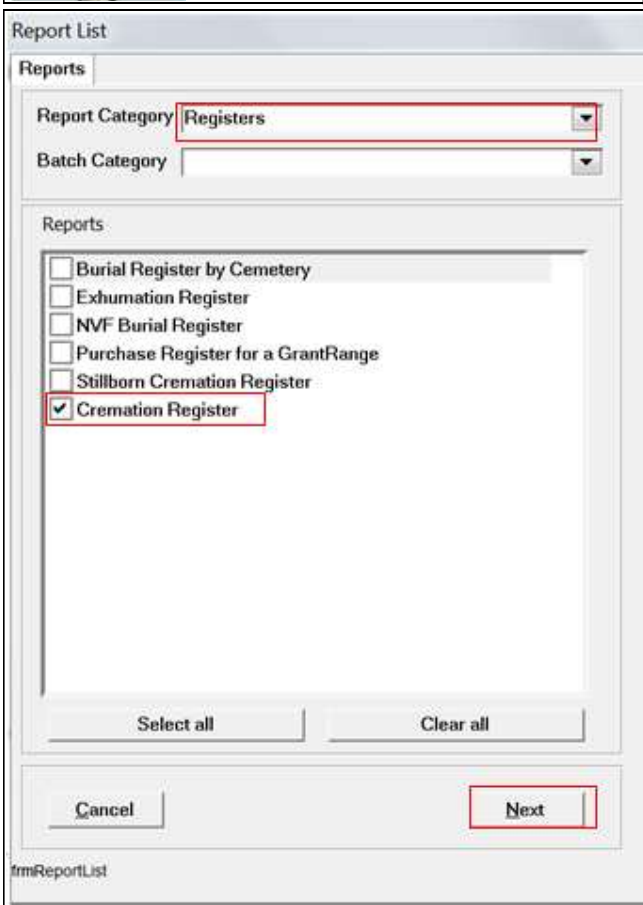
Cancel **Preview** ☐ **Print** Email

frmReportList

The information you are required to enter at the next stage will vary depending on the report selected. Below is an example of a report that requires dates for a financial period. (Other reports may require you to enter a first and last invoice or receipt number for the period.)

1. Enter the *Start Date* for the financial period
2. Enter *End Date* for the financial period
3. Tick *Preview* (if display to screen is required)
4. Click the **Print** button


How to Print A Register

	<p>Select Output from the Outlook bar on the left hand side.</p> <p>Select Print Run from the expanded selection</p>
	<p>The <i>Report List</i> Window will be displayed</p> <p>Select Register as the <i>Report Category</i>.</p> <p>A list of registers set up on your system will be displayed.</p> <p>Select the Register required from the list of <i>Reports</i> and click on Next.</p>

<div>Report List</div> <div>Parameters</div> <div> <div>Date:</div> <div> <div>Start</div> <div>01/04/2015</div> </div> <div> <div>End</div> <div>30/04/2015</div> </div> </div> <div>Email :</div> <div> <div>Cancel</div> <div>Preview <input checked="" type="checkbox"/></div> <div>Print</div> <div>Email</div> </div> <div>frmReportList</div>	<p>Enter the <i>Start Date</i> for the financial period</p> <p>Enter <i>End Date</i> for the financial period</p> <p>Tick <i>Preview</i> (if display to screen is required)</p> <p>Click the Print button</p>
--	--

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How to reprint a range of invoices

<div> <div>Clients</div> <div>Cremation</div> <div>Diary</div> <div>Finance</div> <div>Generate</div> <div>Interment</div> <div>Locations</div> <div>Mapping</div> <div>Memorial</div> <div>Output</div> <div>  </div> <div>Print Run</div> </div>	<ol style="list-style-type: none"> 1. Select Output from the Outlook bar on the left hand side. 2. Select Print Run from the expanded selection.
---	--

Report List

Reports

Report Category: Invoice - Reprint

Batch Category:

Reports

Invoice-Reprint (Single)

☒ Invoices Reprint (Range)

Select all

Clear all

Cancel

Next

tmReportList

Report List

Parameters

Start

End

Invoice:

12

14

Cancel

Preview

Print

tmReportList

The *Report List* Window will be displayed

1. Select **Invoice-Reprint** as the *Report Category*.
2. Select **Invoices Reprint (Range)** from the list of *Reports* and click on **Next**. (The report might be listed under a slightly different name)
3. Enter first and last invoice summary number of the range of invoices to be reprinted on the next window
4. Click on **Print**

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Preferences

Clients

Cremation

Diary

Finance

Generate

Interment

Locations

Memorial

Output

Preferences

Controls

Quick Entry

System

Audit

Preferences

- [Quick Entry](#)
- [System](#)

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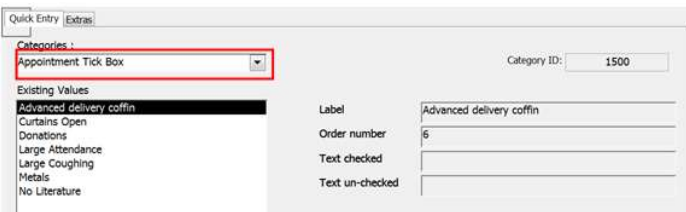
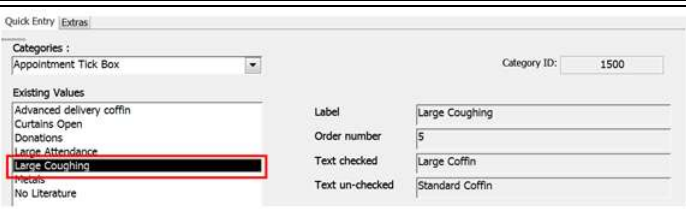
Quick Entry

	Quick Entry
--	-------------

<div>Preferences</div> <div>Controls</div> <div>Quick Entry</div>	<ul style="list-style-type: none"> • Add a Media Event • Add a Media Type • Add a Media Category • Amend An Appointment Tick box Label • Set up an Appointment Tick Box • Add a Coffin Depth • Add a Coffin Length • Add a Coffin Width • Add a Denomination • Add a Diary Status • Add an Occupation / Profession • Add a Title • Add a Transfer Of Rights Method
---	---

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Amend An Appointment Tick box Label

	<ol style="list-style-type: none"> 1. Select Preferences from the <i>Outlook bar</i> on the left hand side. 2. Select Quick Entry from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Quick Entry</i> screen will be displayed 2. Select <i>Appointment Tick Box</i> from the drop down list under Categories
	<ol style="list-style-type: none"> 1. A list of existing values will be displayed: 2. Click on the entry that needs amending. 3. Click on the Edit pencil

Quick Entry Extras

Categories : Appointment Tick Box Category ID: 1500

Existing Values

Advanced delivery coffin	Label	Large Coffin
Curtains Open	Order number	5
Donations	Text checked	Large Coffin
Large Attendance	Text un-checked	Standard Coffin
Large Coffin		
Metals		
No Literature		

1. Amend the name in the *Label* field
2. Click on the **Save** button

Quick Entry Extras

Categories : Appointment Tick Box Category ID: 1500

Existing Values

Advanced delivery coffin	Label	Large Coffin
Curtains Open	Order number	5
Donations	Text checked	Large Coffin
Large Attendance	Text un-checked	Standard Coffin
Large Coffin		
Metals		
No Literature		

1. The corrected Appointment Tick Box label will be displayed in the list on the left hand side.
2. Click on the **Close** button

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Add a Coffin Depth

Clients

Cremation

Diary

Finance

Generate

Interment

Locations

Mapping

Memorial

Output

Preferences

Controls

Quick Entry

1. Select **Preferences** from the *Outlook bar* on the left hand side.
2. Select **Quick Entry** from the expanded selection.

Quick Entry Extras

Categories : Depth Category ID: 5102

Existing Values

18in	Depth	18in
2ft		
4ft 6in		
5ft 6in		
7ft 6in		

The *Quick Entry* screen will be displayed
Select *Depth* from the drop down list under Categories

Quick Entry Extras

Categories : Depth Category ID: 5102

Existing Values

18in	Depth	18in
2ft		
4ft 6in		
5ft 6in		
7ft 6in		


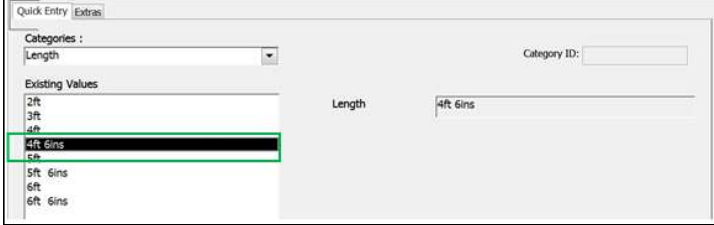
A list of existing values will be displayed.
Click on the **New** button

	<p>Type in the new Depth in the <i>Depth</i> field</p> <p>Click on the Save button</p>
	<p>The new Depth will be added to the list on the left hand</p> <p>Repeat the previous 3 steps to add another new Depth.</p>

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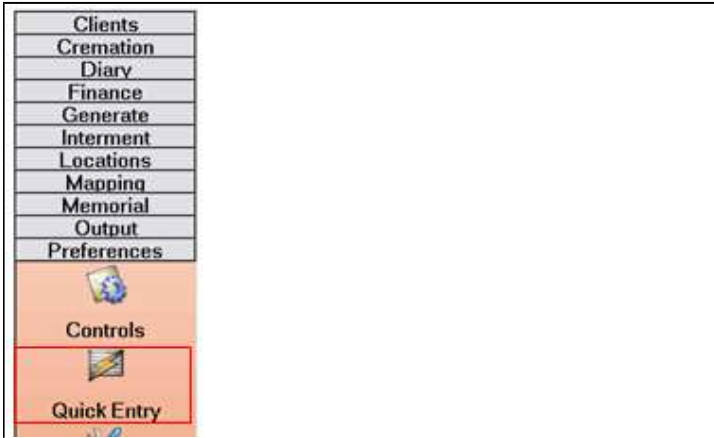



Add a Coffin Length

	<ol style="list-style-type: none"> 1. Select Preferences from the <i>Outlook bar</i> on the left hand side. 2. Select Quick Entry from the expanded selection.
	<p>The <i>Quick Entry</i> screen will be displayed</p> <p>Select <i>Length</i> from the drop down list under Categories</p>
	<p>A list of existing values will be displayed.</p> <p>Click on the New button</p>

	<p>Type in the new Length in the <i>Length</i> field Click on the Save button</p>
	<p>The new Length will be added to the list on the left hand side Repeat the previous 3 steps to add another new Length. Click on the Close button</p>

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Add a Coffin Width

	<p>Select Preferences from the <i>Outlook bar</i> on the left hand side. Select Quick Entry from the expanded selection.</p>
	<p>The <i>Quick Entry</i> screen will be displayed Select <i>Width</i> from the drop down list under Categories</p>
	<p>A list of existing values will be displayed. Click on the New button</p>
	<p>Type in the new Width in the <i>Width</i> field Click on the Save button</p>

Quick Entry | Extras

Categories :
Width

Category ID:

Existing Values

- 18 ins
- 20 ins
- 22 ins
- 24 ins
- 26 ins
- 52 ins

Width 52 ins

The new Width will be added to the list on the left hand side
Repeat the previous 3 steps to add another new Length.
Click on the **Close** button

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Add a Denomination

Clients

Cremation

Diary

Finance

Generate

Interment

Locations

Mapping

Memorial

Output

Preferences

Controls

Quick Entry

Select **Preferences** from the *Outlook bar* on the left hand side.
Select **Quick Entry** from the expanded selection.

Quick Entry | Extras

Categories :
Denomination

Category ID: 2000

Existing Values

- Baptist
- Church in Wales
- Church of England
- Church of Scotland
- Hindu
- Jewish
- Methodist
- Muslim

Denomination Baptist

Use as default

The *Quick Entry* screen will be displayed
Select *Denomination* from the drop down list under Categories

Quick Entry | Extras

Categories :
Denomination

Category ID: 2000

Existing Values

- Baptist
- Church in Wales
- Church of England
- Church of Scotland
- Hindu
- Jewish
- Methodist
- Muslim

Denomination Baptist

Use as default

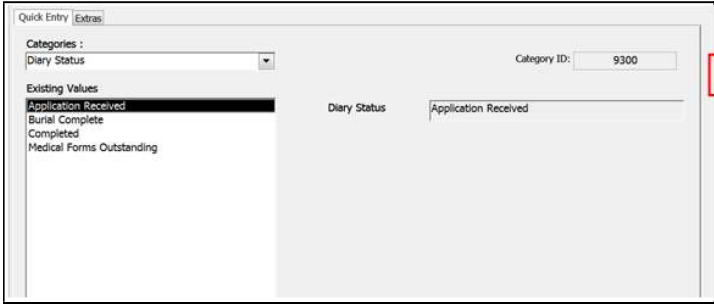
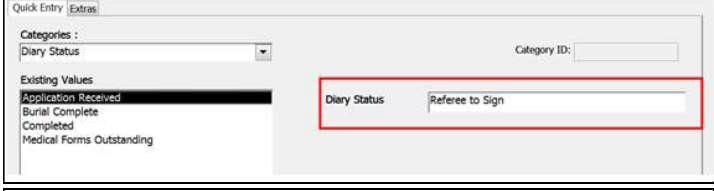
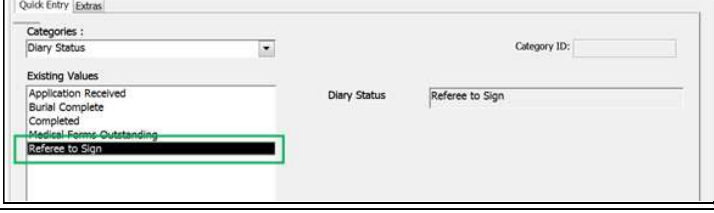
A list of existing values will be displayed.
Click on the **New** button

	<p>Type in the new <i>Denomination</i> in the <i>Denomination</i> field Click on the Save button</p>
	<p>The new <i>Denomination</i> will be added to the list on the left hand side Repeat the previous 3 steps to add another new Length. Click on the Close button</p>

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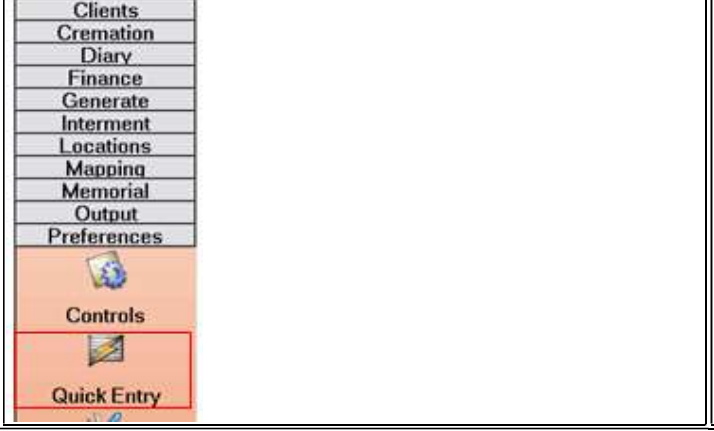
Add a Diary Status




	<p>Select Preferences from the <i>Outlook bar</i> on the left hand side. Select Quick Entry from the expanded selection.</p>
	<p>The <i>Quick Entry</i> screen will be displayed Select <i>Diary Status</i> from the drop down list under Categories</p>

	<p>A list of existing values will be displayed. Click on the New button</p>
	<p>Type in the new <i>Diary Status</i> in the <i>Diary Status</i> field Click on the Save button</p>
	<p>The new Diary Status will be added to the list on the left hand side Repeat the previous 3 steps to add another new <i>Diary Status</i>. Click on the Close button</p>

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Add a Media Category


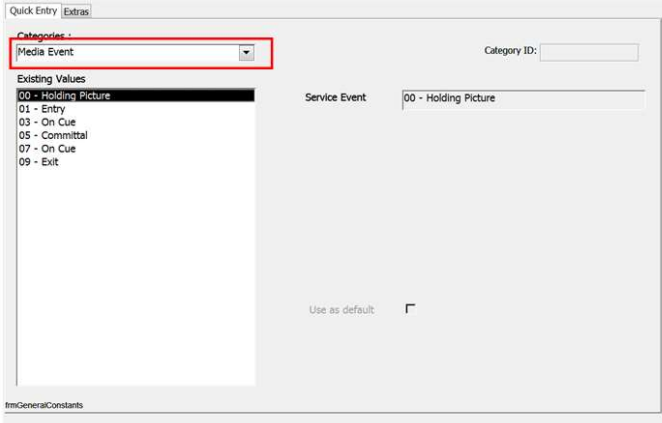

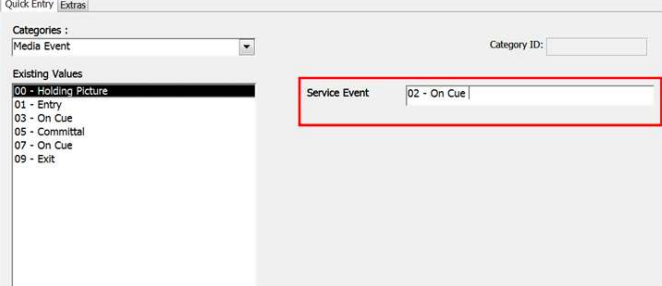
	<p>NOTE: It is helpful to organise music into categories according to its genre e.g. Popular, Classical... This makes selection of the music for a service easier. Follow the notes below if you wish to add a new category.</p>
	<ol style="list-style-type: none"> 1. Select Preferences from the <i>Outlook bar</i> on the left hand side. 2. Select Quick Entry from the expanded selection.

	<ol style="list-style-type: none"> 1. The <i>Quick Entry</i> screen will be displayed 2. Select <i>Media Category</i> from the drop down list under Categories
	<ol style="list-style-type: none"> 1. A list of existing Categories will be displayed. 2. Click on the New button
	<ol style="list-style-type: none"> 1. Type in the new Category in the <i>Media Category</i> field 2. Click on the Save button <p>Click on the Close button</p>

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Add a Media Event

	<p>NOTE –These entries will allow you to order service events for the Music List.</p> <p>Each Media event should be created with a numerical prefix</p>
--	--

	according to where in the music list it should appear.
	<ol style="list-style-type: none"> 1. Select Preferences from the <i>Outlook bar</i> on the left hand side. 2. Select Quick Entry from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Quick Entry</i> screen will be displayed 2. Select <i>Media Event</i> from the drop down list under Categories
	<ol style="list-style-type: none"> 1. A list of existing values will be displayed. 2. Click on the New button
	<ol style="list-style-type: none"> 1. Type in the new Media Event in the <i>Service Event</i> field 2. Click on the Save button


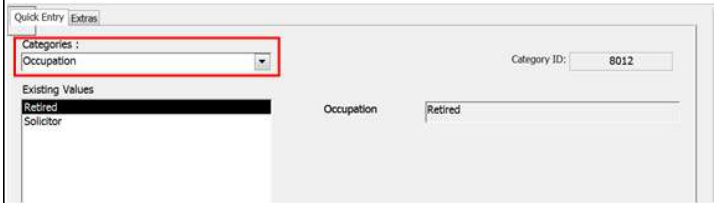
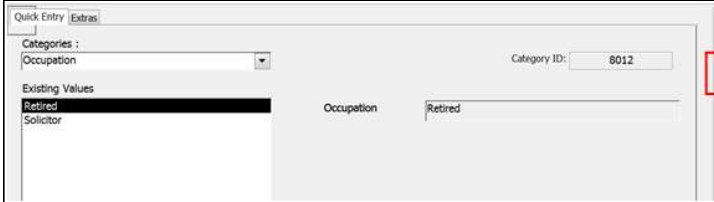
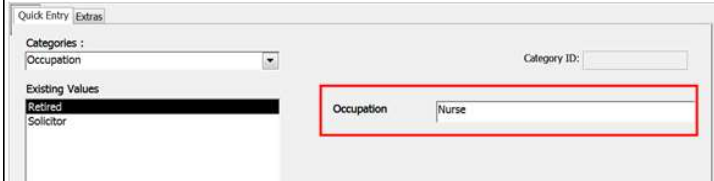
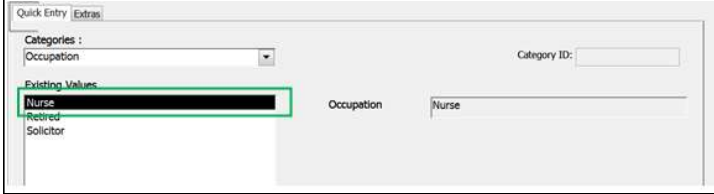
<div> <div>Quick Entry Extras</div> <div> <div>Categories :</div> <div>Media Event</div> </div> <div> <div>Existing Values</div> <div> 00 - Holding Picture 01 - Entry 02 - On Cue 03 - On Cue 05 - Committal 07 - On Cue 09 - Exit </div> </div> <div> <div>Service Event</div> <div>02 - On Cue</div> </div> <div>Category ID:</div> </div>		<ol style="list-style-type: none"> 1. The new Service Event will be added to the list on the left hand side 2. Repeat the previous 2 steps to add another new Service Event. 3. Click on the Close button
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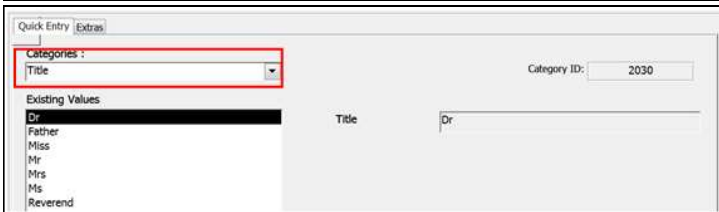


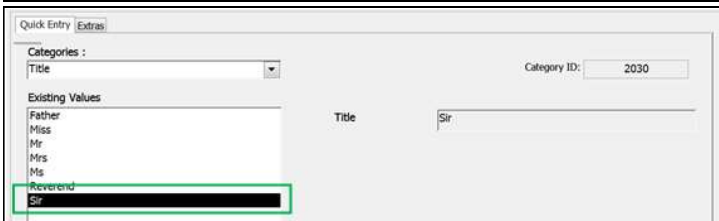
Add a Media Type

	<p>NOTE: Follow instructions below to add CD, DVD, Wesley, Organ and any other medium required.</p>
	<ol style="list-style-type: none"> 1. Select Preferences from the <i>Outlook bar</i> on the left hand side. 2. Select Quick Entry from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Quick Entry</i> screen will be displayed 2. Select <i>Media Type</i> from the drop down list under Categories
	<ol style="list-style-type: none"> 1. A list of existing Media types will be displayed. 2. Click on the New button
	<ol style="list-style-type: none"> 1. Type in the new Media Type in the <i>Media Type</i> field 2. Click on the Save button <p>Click on the Close button</p>

Add an Occupation / Profession






	<p>Select Preferences from the <i>Outlook bar</i> on the left hand side.</p> <p>Select Quick Entry from the expanded selection.</p>
	<p>The <i>Quick Entry</i> screen will be displayed</p> <p>Select <i>Occupation</i> from the drop down list under Categories</p>
	<p>A list of existing values will be displayed.</p> <p>Click on the New button</p>
	<p>Type in the new <i>Occupation</i> in the <i>Occupation</i> field</p> <p>Click on the Save button</p>
	<p>The new <i>Occupation</i> will be added to the list on the left hand side</p> <p>Repeat the previous 3 steps to add another new <i>Occupation</i>.</p> <p>Click on the Close button</p>

Add a Title

	<p>Select Preferences from the <i>Outlook bar</i> on the left hand side.</p> <p>Select Quick Entry from the expanded selection.</p>
	<p>The <i>Quick Entry</i> screen will be displayed</p> <p>Select <i>Title</i> from the drop down list under Categories</p>
	<p>A list of existing values will be displayed.</p> <p>Click on the New button</p>
	<p>Type in the new <i>Title</i> in the <i>Title</i> field</p> <p>Click on the Save button</p>
	<p>The new <i>Title</i> will be added to the list on the left hand side</p> <p>Repeat the previous 3 steps to add another new <i>Title</i>.</p> <p>Click on the Close button</p>

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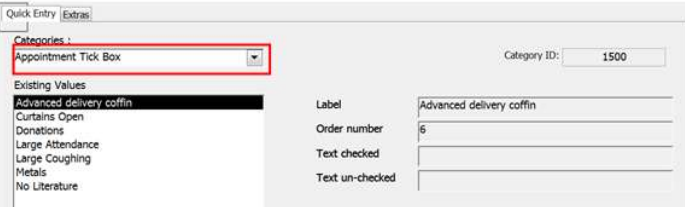
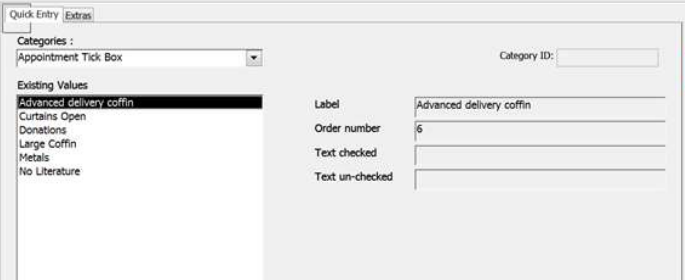
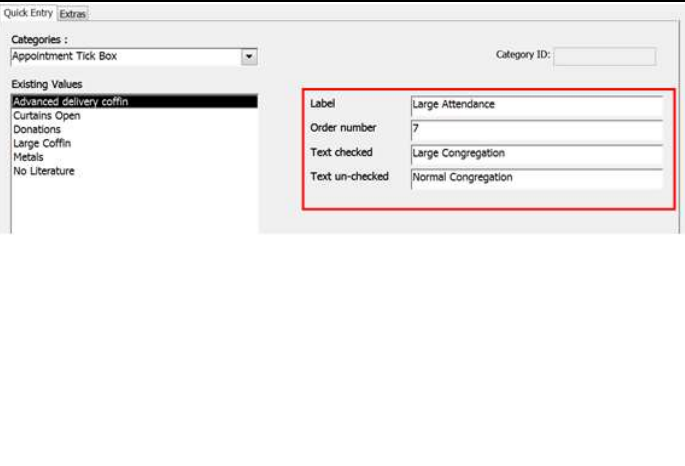

Add a Transfer Of Rights Method

	<p>Select Preferences from the <i>Outlook bar</i> on the left hand side.</p> <p>Select Quick Entry from the expanded selection.</p>
	<p>The <i>Quick Entry</i> screen will be displayed</p> <p>Select <i>Transfer of Rights</i> from the drop down list under Categories</p>
	<p>A list of existing values will be displayed.</p> <p>Click on the New button</p>
	<p>Type in the new <i>Transfer of Rights</i> in the <i>Transfer of Rights</i> field</p> <p>Click on the Save button</p>
	<p>The new <i>Transfer of Rights</i> will be added to the list on the left hand side</p> <p>Repeat the previous 3 steps to add another new <i>Transfer of Rights</i>.</p> <p>Click on the Close button</p>

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Set up an Appointment TickBox




	<p>NOTE: Appointment tick boxes are customisable and allow you to note additional circumstances for each booking. For example Curtains are to remain open; the applicant has said no to literature; Metals are to be returned to the family; a donation box is required; a large</p>
--	---

	coffin is required or large attendance is expected.
	<ol style="list-style-type: none"> 1. Select Preferences from the <i>Outlook bar</i> on the left hand side. 2. Select Quick Entry from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Quick Entry</i> screen will be displayed 2. Select <i>Appointment Tick Box</i> from the drop down list under Categories
	<ol style="list-style-type: none"> 1. A list of existing values will be displayed: 2. Click on the New button
	<ol style="list-style-type: none"> 1. Type in a name for the new appointment tick box in the <i>Label</i> field 2. Enter the next order number for the new label 3. Type in the circumstances when the tick box will be checked in the <i>Text checked</i> field 4. Type in the circumstances when the tick box will be left unchecked in the <i>Text un-checked</i> field 5. Click on the Save button
	<ol style="list-style-type: none"> 1. The new Appointment Tick Box will be added to the list on the left hand side. 2. Click on the Close button 3. NOTE: Follow these instructions to use the tick

	boxes for a booking Check An Appointment Tick Box For A Booking
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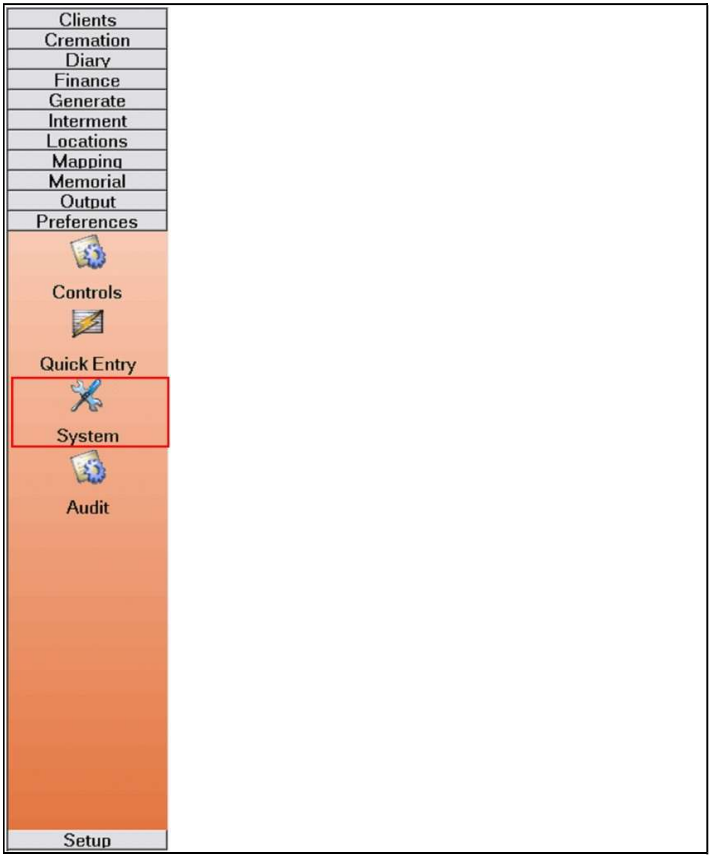
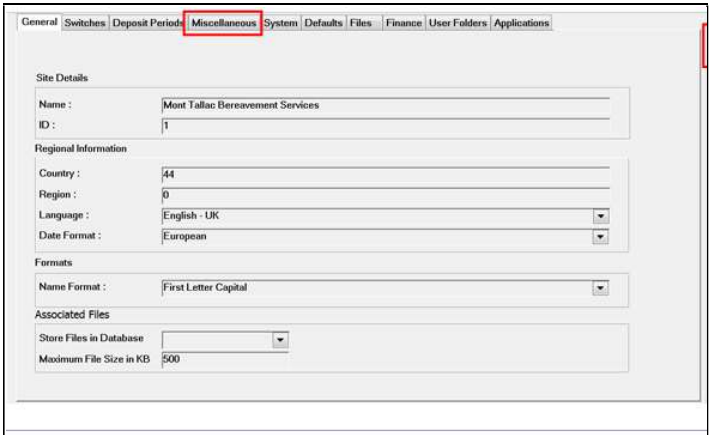
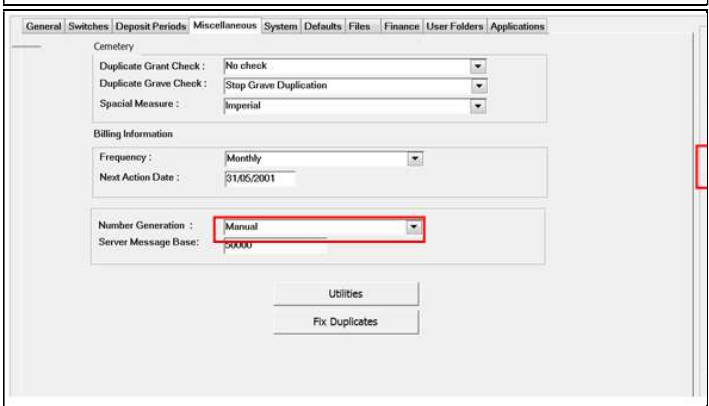
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System

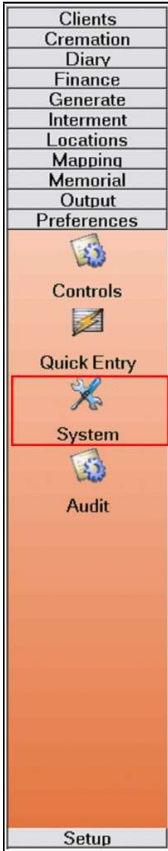
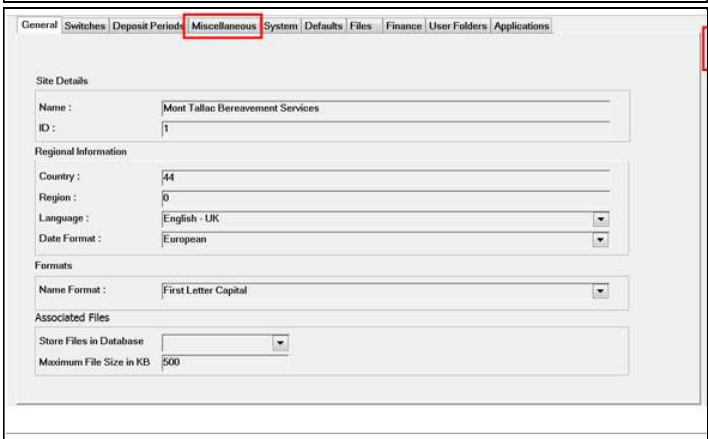
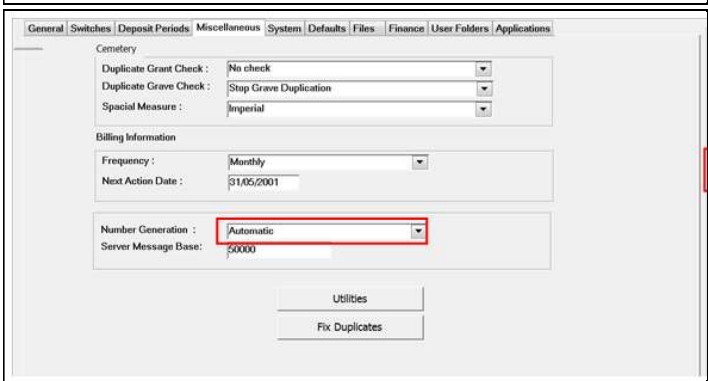
	System
<div><div>Clients</div><div>Cremation</div><div>Diary</div><div>Finance</div><div>Generate</div><div>Interment</div><div>Locations</div><div>Memorial</div><div>Output</div><div>Preferences</div><div> Controls</div><div> Quick Entry</div><div> System</div></div>	<div>Preferences</div> <ul style="list-style-type: none">• Switch Numbering from Automatic to Manual• Switch Numbering from Manual to Automatic• Switch On Prompt for Location for Finance

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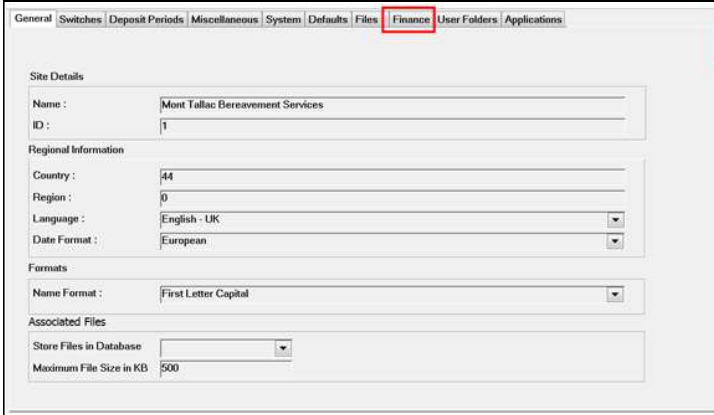
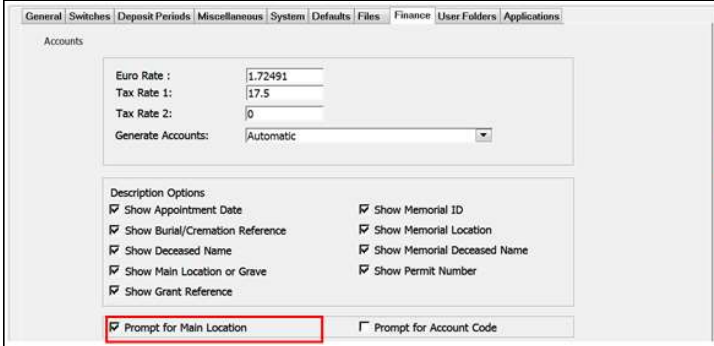
Switch Numbering from Automatic to Manual

	<ol style="list-style-type: none"> 1. Select Prefrences from the <i>Outlook bar</i> on the left hand side 2. Select System from the expanded selection.
	<p>The <i>System Settings</i> screen will be displayed</p> <ol style="list-style-type: none"> 1. Click on the Miscellaneous tab 2. Click on the Edit Pencil
	<ol style="list-style-type: none"> 1. Select Manual from the list for <i>Number Generation</i> 2. Click on Save 3. Click on the Close button


Switch Numbering from Manual to Automatic





	<ol style="list-style-type: none"> 1. Select Prefences from the <i>Outlook bar</i> on the left hand side 2. Select System from the expanded selection.
	<p>The <i>System Settings</i> screen will be displayed</p> <ol style="list-style-type: none"> 1. Click on the Miscellaneous tab 2. Click on the Edit Pencil
	<ol style="list-style-type: none"> 1. Select Automatic from the list for <i>Number Generation</i> 2. Click on Save 3. Click on the Close button

Switch On Prompt for Location for Finance

	<p>Select Preferences from the <i>Outlook bar</i> on the left hand side.</p> <p>Select System from the expanded selection.</p>
	<p>The <i>System Settings</i> screen will be displayed</p> <p>Click on the Finance tab</p> <p>Click on the Edit Pencil</p>
	<p>Click in the <i>Prompt For Main Location</i> box</p> <p>Click on Save</p> <p>Click on the Close button</p>


Setup

	<p>Company</p> <ul style="list-style-type: none"> • Set up next invoice no. • Set up next receipt no • Amend company name, address and contact details
---	--

 Location	Location <ul style="list-style-type: none"> • Add a new Section • Amend a Section Name • Amend Contact Numbers and Email Address for a Location • Amend the Postal Address for a Location • Amend Staff Names and Job Titles for a Location • Switch Main(Office) Details To A Different Location
 Music	Music <ul style="list-style-type: none"> • Add a new Title, Composer or Artist • Amend a Music Title • Add a new Music Title from a Booking • Amend a Music entry on a Booking
 Register	Register <ul style="list-style-type: none"> • To set the last register number for cremations/burials • Set Up A Grave Grant Register for a Single Cemetery • Set Up A Grave Grant Register shared over 2 or more cemeteries
 Resources	Resources <ul style="list-style-type: none"> • Set up a Memorial Resource Group • Set up a Miscellaneous Resource Group • Set up a new Type of Memorial • Set up a new Miscellaneous Item • Set up a new type of Grave • Set up a new type of Service • Set up Medical Inspectors • Set up Medical Referee Payment • Set up Miscellaneous Booking Notes • Setup Organist Payment • Rename a Day Type


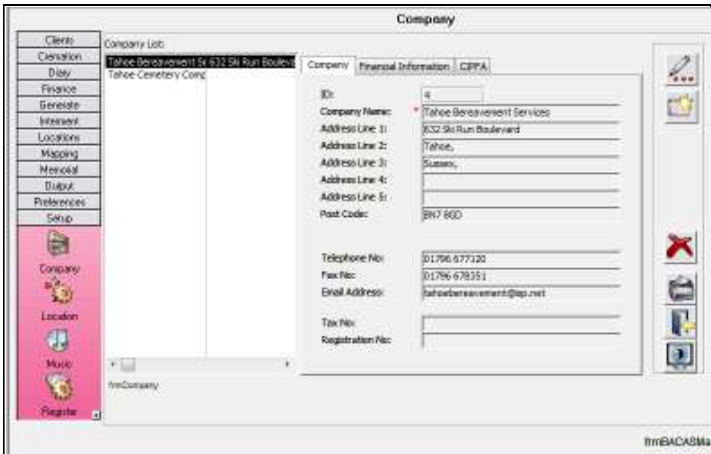
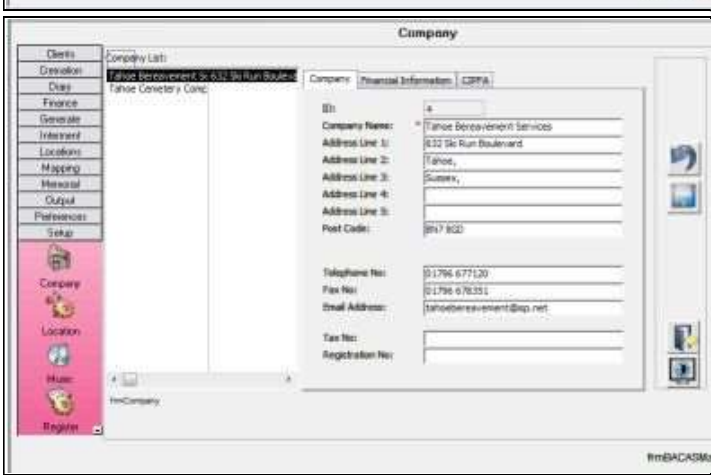
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Company


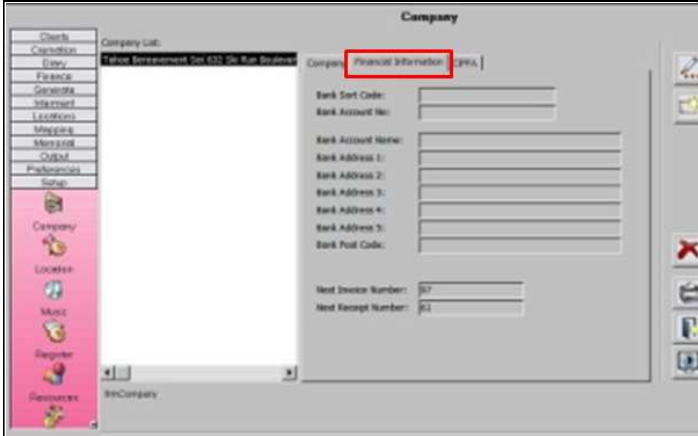
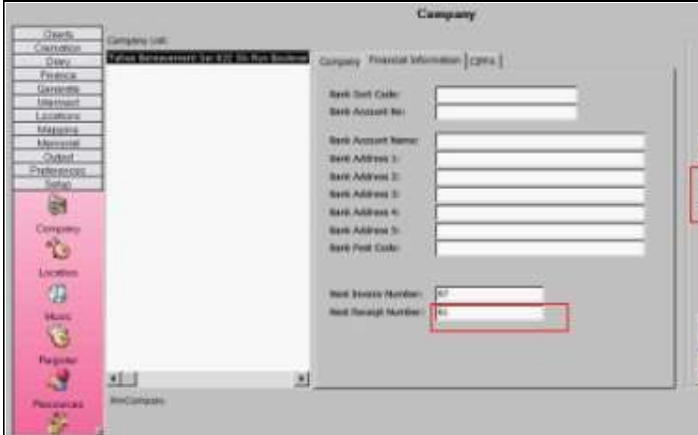
 Company	Company <ul style="list-style-type: none"> • Set up next invoice no. • Set up next receipt no. • Amend company name, address and contact details
--	--

Created with the Standard Edition of HelpNDoc: Create HTML Help, DOC, PDF and print manuals from 1 single source


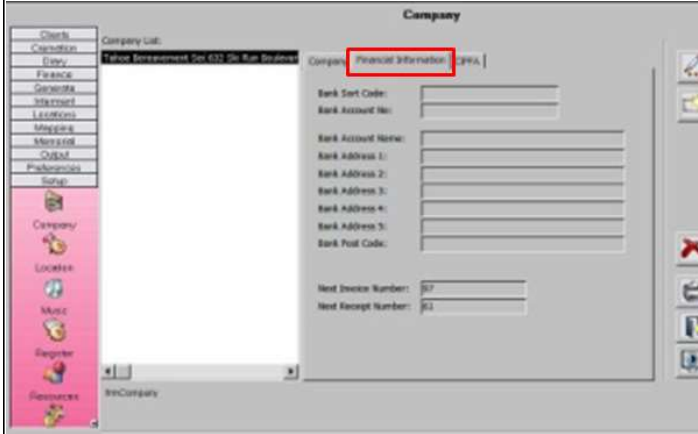
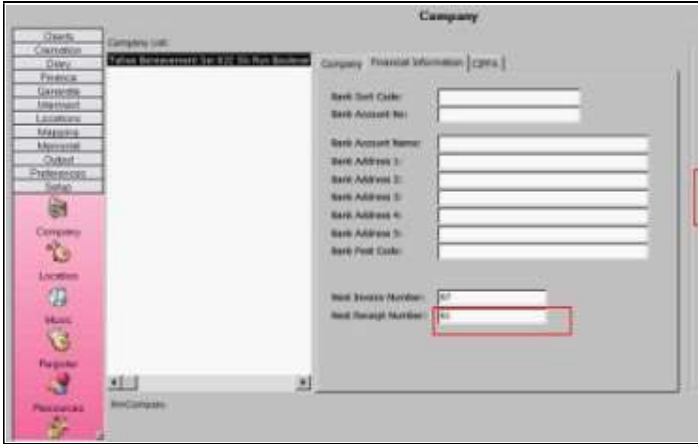
Amend company name, address and contact details

	<p>Select Setup from the Outlook bar on the left hand side</p> <p>Select Company from the expanded selection</p>
	<p>The Company screen will be displayed with the Company tab displayed</p> <p>Click on the Edit Pencil</p>
	<p>The screen will display in Edit mode</p> <p>Make changes and hit the Save button</p>



Set up next invoice no.

	<p>Select Setup from the Outlook bar on the left hand side</p> <p>Select Company from the expanded selection</p>
	<p>The Company screen will be displayed</p> <p>Select the Financial information tab</p> <p>Click on the Edit Pencil</p>
	<p>The screen will display in Edit mode</p> <p>Enter the number that you wish BACASNG to allocate for the next invoice in the Next Invoice Number field</p> <p>Click on the Save button</p>

Set up next receipt no

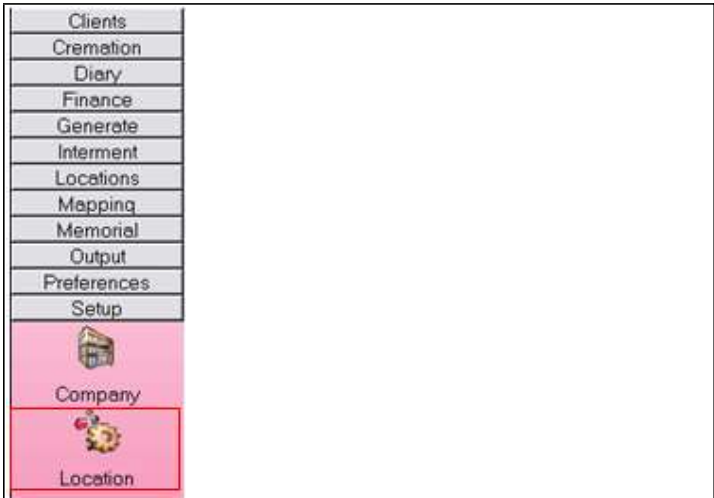
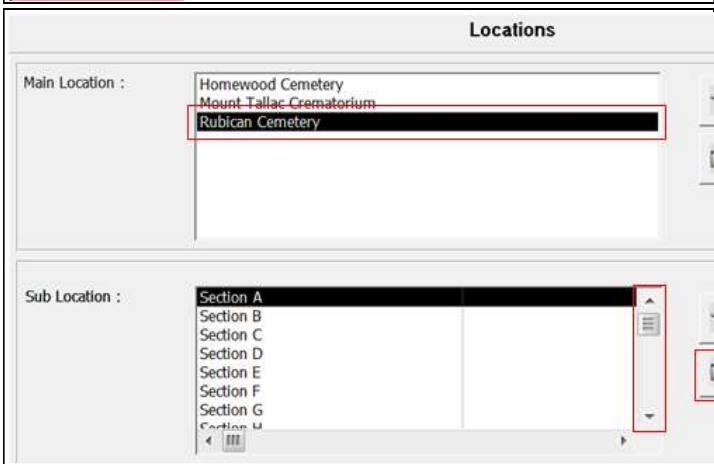
	<p>Select Setup from the Outlook bar on the left hand side</p> <p>Select Company from the expanded selection</p>
	<p>The Company screen will be displayed</p> <p>Select the Financial information tab</p> <p>Click on the Edit Pencil</p>
	<p>The screen will display in Edit mode</p> <p>Enter the number that you wish BACASNG to allocate for the next receipt in the Next Receipt Number field</p> <p>Click on the Save button</p>

Location

<div>Setup</div>  <div>Company</div>  <div>Location</div>	Location <ul style="list-style-type: none"> • Add a new Section for a Location • Amend Contact Numbers and Email Address for a Location • Amend the Postal Address for a Location • Amend a Section Name • Amend Staff Names and Job Titles for a Location • Switch Main(Office) Details To A Different Location
---	---

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Add a new Section for a Location

	<ol style="list-style-type: none"> 1. Select Setup from the <i>Outlook bar</i> on the left hand side. 2. Select Location from the expanded selection.
	<p>The <i>Locations</i> screen will be displayed.</p> <ol style="list-style-type: none"> 1. Select the <i>Location</i> which holds the section you wish to add 2. Use the scroll bar (if necessary) to check that the section has not already been added in BACAS 3. Once satisfied that the section has not already been added, click on the bottom New button

The *Sub Locations* window will open:

1. Enter the section name in *Top Description*
2. Click on the **Save** button

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Amend Contact Numbers and Email Address for a Location

1. Select **Setup** from the *Outlook bar* on the left hand side.
2. Select **Location** from the expanded selection.

The *Locations* screen will be displayed.

1. Select the *Location* whose details you wish to amend
2. Click on the **Pointing Finger**

The *Main Location* window will open:

NOTE:

The location given under the *Main Details* button holds the address, phone numbers, email address and staff details for the administrative staff.

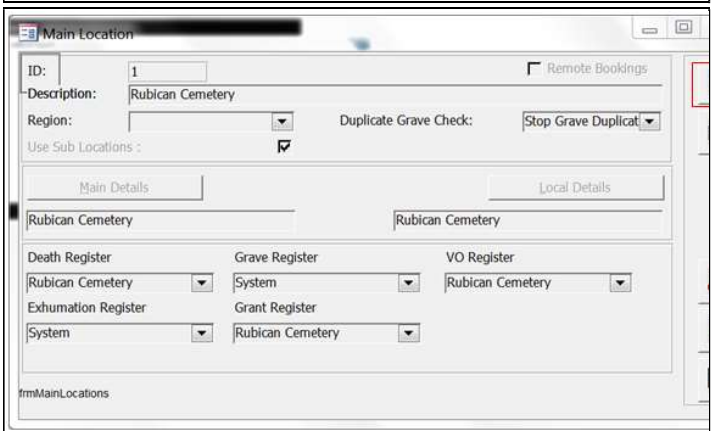
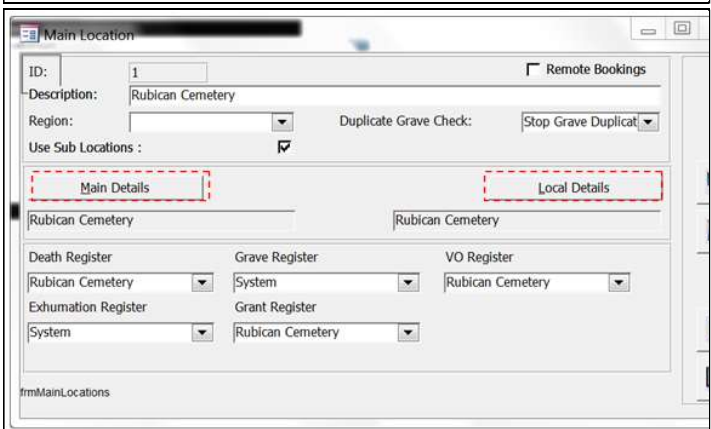
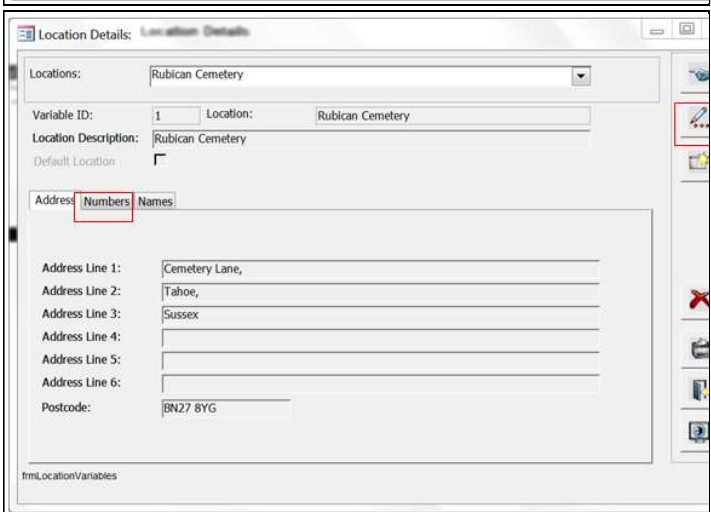
The location given under *Local Details* holds the address, phone numbers and staff members involved with the daily operation of the location

In some cases *Main Details* and *Local details* will be the same. (For example: In the case of a crematorium where the office is on the same site as the chapel and cremator; or for example: a cemetery which has an office in the grounds) This is the case in the image below.

In some cases *Main Details* and *Local details* will be different. (In the case of a cemetery that doesn't have an office in the grounds the *Main Details* will hold the address of the office where cemetery administration is carried out and the *Local Details* will hold the actual address of the cemetery and the names of the cemetery manager and operatives.

If *Main Details* and *Local Details* are the same: any changes made to Main details will be automatically updated in *Local Details* and any changes made to *Local Details* will be automatically updated in *Main Details* (as in the example below)

If *Main Details* and *Local*

	<p><i>Details are different: any changes made to Main details will not be updated in Local Details and any changes made to Local Details will not be updated in Main Details</i></p>
	<p>1. Click on the Edit pencil</p>
	<p>1. Click on the <i>Main Details</i> button or <i>Local Details</i> button</p>
	<p>The <i>Location Details</i> screen will open:</p> <ol style="list-style-type: none"> 1. Click on the Edit pencil 2. Click on the <i>Numbers</i> tab

1. Amend the telephone numbers/fax number/email address as appropriate
2. Click on **Save**

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Amend the Postal Address for a Location

1. Select **Setup** from the *Outlook bar* on the left hand side.
2. Select **Location** from the expanded selection.

The *Locations* screen will be displayed.

1. Select the *Location* whose details you wish to amend
2. Click on the **Pointing Finger**

The *Main Location* window will open:

NOTE:

The location given under the *Main Details* button holds the address, phone numbers, email address and staff details for the administrative staff.

The location given under *Local Details* holds the address, phone numbers and staff members involved with the daily operation of the location

In some cases *Main Details* and *Local details* will be the same. (For example: In the case of a crematorium where the office is on the same site as the chapel and cremator; or for example: a cemetery which has an office in the grounds) This is the case in the image below.

In some cases *Main Details* and *Local details* will be different. (In the case of a cemetery that doesn't have an office in the grounds the *Main Details* will hold the address of the office where cemetery administration is carried out and the *Local Details* will hold the actual address of the cemetery and the names of the cemetery manager and operatives.

If *Main Details* and *Local Details* are the same: any changes made to Main details will be automatically updated in *Local Details* and any changes made to *Local Details* will be automatically updated in Main *Details* (as in the example below)

If *Main Details* and *Local Details* are the different: any changes made to Main details will not be updated in *Local Details* and any changes made to *Local Details* will not be updated in Main *Details*

frmMainLocations

1. Click on the **Edit** pencil

frmMainLocations

Click on the *Main Details* button or *Local Details* button

frmLocationVariables

The *Location Details* screen will open:

1. Click on the **Edit** pencil

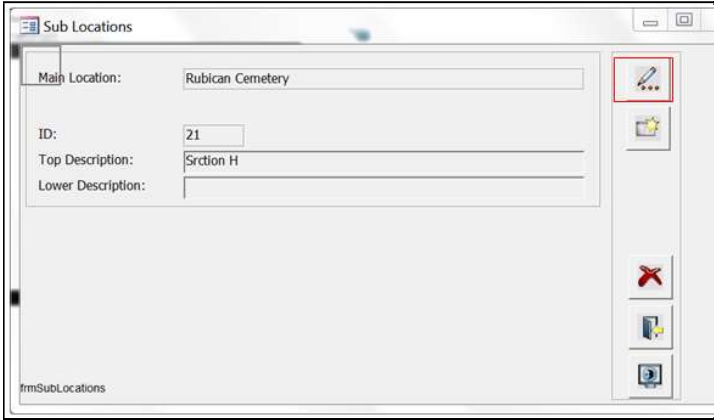
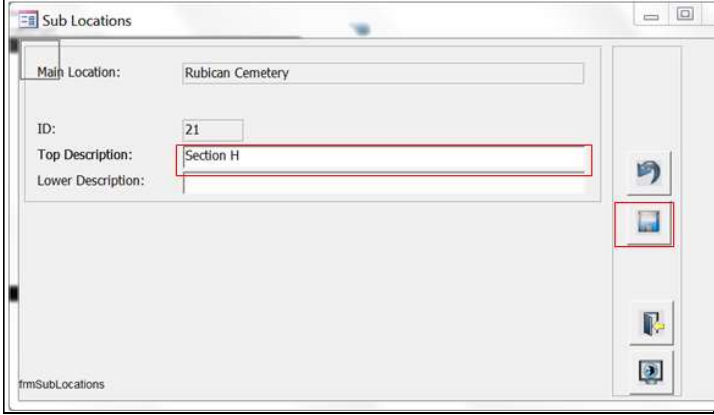
Location Details: Location Details	
Locations:	Rubican Cemetery
Variable ID:	1 Location: Rubican Cemetery
Location Description:	Rubican Cemetery
Default Location	<input type="checkbox"/>
<div>Address Numbers Names</div>	
Address Line 1:	Cemetery Lane,
Address Line 2:	Tahoe,
Address Line 3:	Sussex
Address Line 4:	
Address Line 5:	
Address Line 6:	
Postcode:	BN27 8YG
frmLocationVariables	

1. Amend postal address as appropriate
2. Click on **Save**

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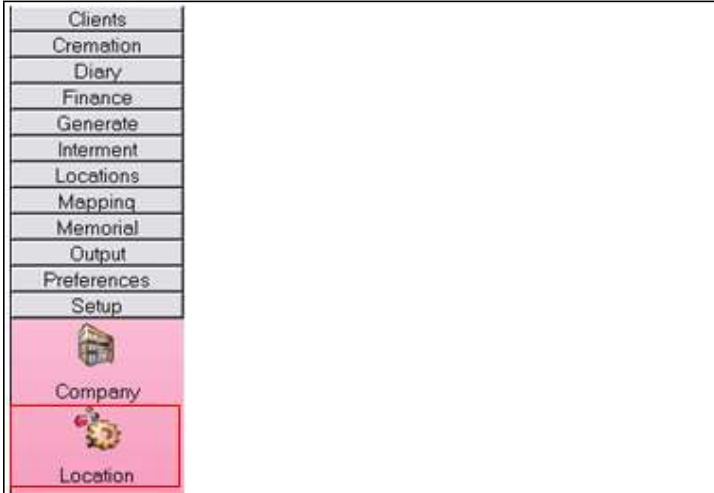
Amend a Section Name

<div> <div>Clients</div> <div>Cremation</div> <div>Diary</div> <div>Finance</div> <div>Generate</div> <div>Interment</div> <div>Locations</div> <div>Mapping</div> <div>Memorial</div> <div>Output</div> <div>Preferences</div> <div>Setup</div> <div>Company</div> <div>Location</div> </div>	<ol style="list-style-type: none"> 1. Select Setup from the <i>Outlook bar</i> on the left hand side. 2. Select Location from the expanded selection.
<div> <div>Main Location :</div> <div> <div>Homewood Cemetery</div> <div>Mount Tallac Crematorium</div> <div>Rubican Cemetery</div> </div> </div> <div> <div>Sub Location :</div> <div> <div>Section C</div> <div>Section D</div> <div>Section E</div> <div>Section F</div> <div>Section G</div> <div>Section H</div> <div>Section I</div> <div>Section J</div> </div> </div>	<p>The <i>Locations</i> screen will be displayed.</p> <ol style="list-style-type: none"> 1. Select the <i>Location</i> which holds the section you wish to amend 2. Select the Section you wish to amend 3. Click on the bottom Pointing Finger button

	<p>The <i>Sub Locations</i> window will open:</p> <ol style="list-style-type: none"> 1. Click on the Edit Pencil
	<ol style="list-style-type: none"> 1. Amend the section name as required. 2. Click on the Save button

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Amend Staff Names and Job Titles for a Location

	<ol style="list-style-type: none"> 1. Select Setup from the <i>Outlook bar</i> on the left hand side. 2. Select Location from the expanded selection.
---	---

Locations

Main Location :
 Homewood Cemetery
 Mount Tallac Crematorium
 Rubican Cemetery

Sub Location :
 Section A
 Section B
 Section C
 Section D
 Section E
 Section F
 Section G
 Section H

The *Locations* screen will be displayed.

1. Select the *Location* which holds the section you wish to amend
2. Click on the **Pointing Finger** button

Main Location

ID: 1 Remote Bookings

Description: Rubican Cemetery

Region: Duplicate Grave Check: Stop Grave Duplicat

Use Sub Locations: ☒

Main Details **Local Details**

Rubican Cemetery Rubican Cemetery

Death Register Grave Register VO Register

Rubican Cemetery System Rubican Cemetery

Exhumation Register Grant Register

System Rubican Cemetery

frmMainLocations

NOTE:

The location given under the *Main Details* button holds the address, phone numbers, email address and staff details for the administrative staff.

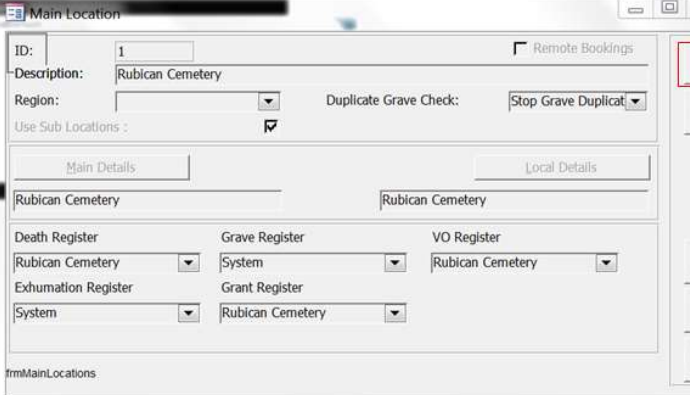
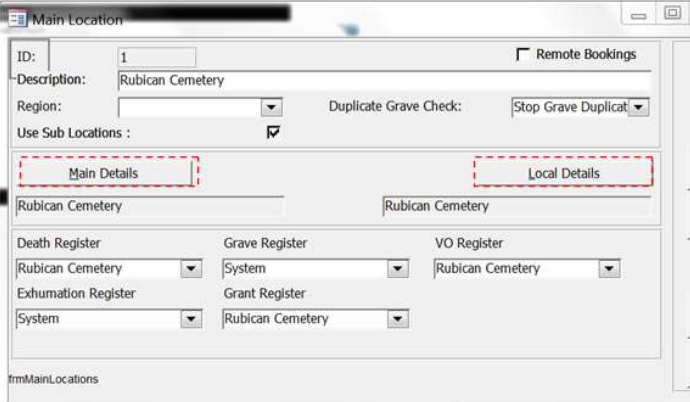
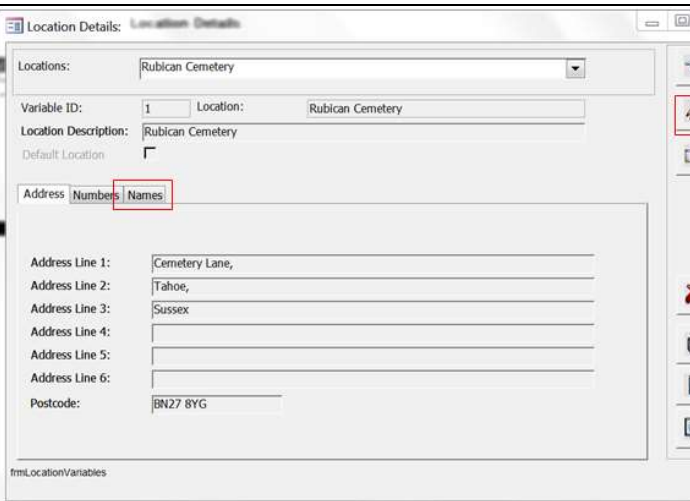
The location given under *Local Details* holds the address, phone numbers and staff members involved with the daily operation of the location

In some cases *Main Details* and *Local details* will be the same. (For example: In the case of a crematorium where the office is on the same site as the chapel and cremator; or for example: a cemetery which has an office in the grounds) This is the case in the image below.

In some cases *Main Details* and *Local details* will be different. (In the case of a cemetery that doesn't have an office in the grounds the *Main Details* will hold the address of the office where cemetery administration is carried out and the *Local Details* will hold the actual address of the cemetery and the names of the cemetery manager and operatives.

If *Main Details* and *Local Details* are the same: any changes made to Main details will be automatically updated in *Local Details* and any changes made to *Local Details* will be automatically updated in Main *Details* (as in the example below)

If *Main Details* and *Local Details* are the different: any changes made to Main details will not be updated in *Local Details* and any changes made to *Local Details* will not be updated

	in Main <i>Details</i>
	<ol style="list-style-type: none"> 1. Click on the Edit pencil
	<ol style="list-style-type: none"> 1. Click on the <i>Main Details</i> button or <i>Local Details</i> button
	<p>The <i>Location Details</i> screen will open:</p> <ol style="list-style-type: none"> 1. Click on the Edit pencil 2. Click on the <i>Names</i> tab

Location Details: Location Details

Locations: Rubican Cemetery

Variable ID: 1 Location: Rubican Cemetery

Location Description: Rubican Cemetery

Default Location ☐

Address Numbers Names

	Title	Name
1	Bereavement Services Manager	Mr Brian Raddiffe
2	Assistant Bereavement Services Manager	John Harding
3	Bereavement Services Assistant	Sue Townley
4		
5		
6		
7		
8		
9		

fmLocationVariables

1. Amend the names and titles of staff as appropriate
2. Click on **Save**

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Switch Main(Office) Details To A Different Location

Clients

Cremation

Diary

Finance

Generate

Interment

Locations

Mapping

Memorial

Output

Preferences

Setup

Company

Location

1. Select **Setup** from the *Outlook bar* on the left hand side.
2. Select **Location** from the expanded selection.

Locations

Main Location : Homewood Cemetery

Mount Tallac Crematorium

Rubican Cemetery

Sub Location :

Section A

Section B

Section C

Section D

Section E

Section F

Section G

Section H

The *Locations* screen will be displayed.

1. Select the *Location* which holds the section you wish to amend
2. Click on the **Pointing Finger** button

The screenshot shows the 'Main Location' window. At the top, there's a header bar with the title 'Main Location'. Below it, there's a form with several sections. The 'Main Details' tab is selected and highlighted with a green border. It contains fields for 'ID' (value 1), 'Description' (Rubican Cemetery), 'Region' (dropdown), 'Duplicate Grave Check' (Stop Grave Duplicat), and 'Use Sub Locations' (checked). Below these are two more tabs: 'Main Details' and 'Local Details', both containing the text 'Rubican Cemetery'. Further down, there are several registers: 'Death Register' (Rubican Cemetery), 'Grave Register' (System), 'VO Register' (Rubican Cemetery), 'Exhumation Register' (System), and 'Grant Register' (Rubican Cemetery). The bottom of the window shows the text 'frmMainLocations'.

The *Main Location* window will open:

NOTE:

The location set under the *Main Details* button determines the address, phone numbers, email address and staff details for the administrative staff. The location set under *Local Details* determines the address, phone numbers and staff members involved with the day to day operation of the location

In some cases *Main Details* and *Local details* will need to be different. (For example In the case of a cemetery that doesn't have an office in the grounds the *Main Details* will hold the address of the office where cemetery administration is carried out and the *Local Details* will hold the actual address of the cemetery and the names of the cemetery manager and operatives.

To set *Main Details* to a different location

1. Click on the **Edit** pencil

This screenshot is identical to the one above, showing the 'Main Location' window with the 'Main Details' tab selected. The 'Main Details' tab is now highlighted with a red rectangular box, indicating the next step in the process.

1. Click on the *Main Details* button

The *Location Details* screen will open:

1. Select the *Location* you wish to set the *Main(office) Details* to
2. Click on the **Pointing Finger**

You will be returned to the *Main Locations* screen

You will see the new *Location* set up under the *Main Details* button

1. Click on **Save**

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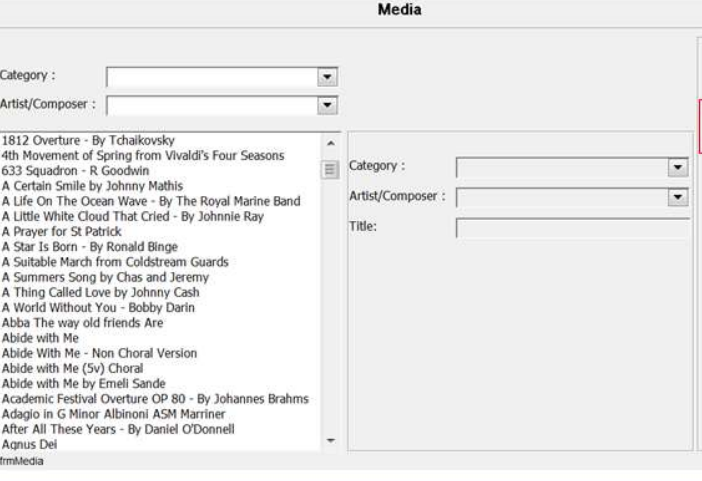
Music

Music

- [Add a new Title, Composer or Artist](#)
- [Amend a Music Title](#)
- [Add a new Music Title from a Booking](#)
- [Amend a Music entry on a Booking](#)
- [Add a new music title from SETUP](#)

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Add a new Title, Composer or Artist

	<p>NOTE: It is helpful to organise music titles according to Artist or Composer.</p> <p>This makes selection of the music for the service easier. Follow the notes below if you wish to add a new composer or artist.</p> <p>(A new composer can also be added from the Music tab of the booking)</p>
	<ol style="list-style-type: none"> 1. Select Setup from the <i>Outlook bar</i> on the left hand side. 2. Select Music from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Media</i> screen will be displayed. 2. Click on the New button

<p>Category : <input type="text"/></p> <p>Artist/Composer : <input type="text"/></p> <p>1812 Overture - By Tchaikovsky 4th Movement of Spring from Vivaldi's Four Seasons 633 Squadron - R Goodwin A Certain Smile by Johnny Mathis A Life On The Ocean Wave - By The Royal Marine Band A Little White Cloud That Cried - By Johnnie Ray A Prayer for St Patrick A Star Is Born - By Ronald Binge A Suitable March from Coldstream Guards A Summers Song by Chas and Jeremy A Thing Called Love by Johnny Cash A World Without You - Bobby Darin Abba The way old friends Are Abide with Me Abide With Me - Non Choral Version Abide with Me (Sv) Choral Abide with Me by Emeli Sande Academic Festival Overture OP 80 - By Johannes Brahms Adagio in G Minor Albinoni ASM Marriner After All These Years - By Daniel O'Donnell Agnus Dei</p> <p>Category : <input type="text"/> Popular</p> <p>Artist/Composer : <input type="text"/> Adele</p> <p>Title: <input type="text"/> Someone Like You</p>	<ol style="list-style-type: none"> 1. Select the <i>Category</i> from the <i>Category</i> selection list 2. Type in the name of the Artist or Composer in the <i>Artist/Composer</i> field 3. Type in a title for that Artist or Composer in the <i>Title</i> field 4. Click on Save
<p>Media</p> <p><input type="checkbox"/></p> <p>Category : <input type="text"/> Popular</p> <p>Artist/Composer : <input type="text"/> Adele</p> <p>Someone Like You</p> <p>Category : <input type="text"/> Popular</p> <p>Artist/Composer : <input type="text"/> Adele</p> <p>Title: <input type="text"/> Someone Like You</p> <p>frmMedia</p>	<ol style="list-style-type: none"> 1. Your entry will now appear on the left hand side of the screen 2. Click on Save to confirm this entry 3. Repeat the previous step to add another new title or composer OR 4. Click on the Close button to return to the main screen.

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Add a New Music Title From A booking

	<p>NOTE: These pages are applicable to a Cremation, Burial or Scattering booking. Follow these notes if you adding to the music list and you wish to use a music title that isn't already in the Music Library:</p>
<p>Clients</p> <p>Cremation</p> <p>Diary</p> <p></p> <p>Show Diary</p>	<ol style="list-style-type: none"> 1. Select Diary from the Outlook bar on the left hand side. 2. Select Show Diary from the expanded selection.

View: Diary Page Diary: Mount Tallac Crematorium Date: Wednesday 04/02/2015

Time	Title	Comments	Process	Agent	Location
09:00					
09:30					
10:00	Logan		Medical Forms Ou...	John Turner	Mount Tallac Cre
10:30					
11:00	Hicks			T. R. Harris Funeral Services	Mount Tallac Cre
11:30					
12:00	Hage		Application Recei...	Cookson and Smythe Funeral ...	Mount Tallac Cre
12:30					
13:00					
13:30					

1. The *Appointment Diary* screen will be displayed.
2. Select the correct *Diary* for the booking
3. Select the *Date* of the booking
4. All bookings for that diary page for that date will be displayed
5. Double click on the time of the booking in question

Cremation

Deceased: **Mr George Fisher Logan** Date: **Wed, 04/02/2015** Time: **10:00**

Funeral Director: **John Turner** Service: **Full Service**

Location: **Mount Tallac Crematorium**

Initial Information Service Details **Music** Deceased Details Applicant Medical Disposal Memorials Misc. Finance

Appointment 1904_2503 Deceased 3715

* Date: 04/02/2015 Client Request

* Time: 10:00

Privacy: Public

Status: Medical Forms Outstanding

* Diary: Mount Tallac Crematorium

* Location: Mount Tallac Crematorium

Type of Service: Full Service

View Funeral Dir. Private Clear

Funeral Director: John Turner

Title: Mr Address

Forenames: George Fisher

Surname: Logan

Maidenname:

Other name:

Address Line 1: 6 Bond Street,

Address Line 2: Tahoe,

Address Line 3: Sussex

Address Line 4:

Address Line 5:

Address Line 6:

Post Code: BN6 8TF + Add

Comments:

The booking will open on the *Initial Info* tab

NOTE: The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this.

1. Click on the **Music** Tab
2. Click on the **Edit** pencil

Cremation

Deceased: **Mr George Fisher Logan** Date: **Wed, 04/02/2015** Time: **10:00**

Funeral Director: **John Turner** Service: **Full Service**

Location: **Mount Tallac Crematorium**

Initial Information Service Details **Music** Deceased Details Applicant Medical Disposal Memorials Misc. Finance

Organist: View Select Clear

Surname:

Event: 07 - On Cue Category: Popular

Type: Soloist (Instrumental) Composer: Nat King Cole

Comments: Family Member to perform Song: Unforgettable

Add to Library Delete Music Add Music

00 - Holding I CD Family's choice

01 - Entry Wesley Clair De Lune (Claude Debussy) Play quietly

02 - On Cue Soloist Someone Like You (Adele) Family Member to sing

05 - Commit: Wesley In My Life (Beatles) Continue until the end

1. The Music for the booking will be displayed.
2. Select the Event from the *Event* selection list (Events can be added in any order and the music list will always display in the correct order of service).
3. Select the type of media from the *Type* drop down selection list.
4. Enter any comments required in the *Comments* field.
5. Select the appropriate Category for the new music title from *Category* drop down selection list.
6. Select the appropriate Artist for the new music title from *Composer* drop down selection list.
7. Type in the new music title.
8. Tick *Add to Library*.
9. Click on **Add Music**

Deceased: Mr George Fisher Logan Date: Wed, 04/02/2015 Time: 10:00
 Funeral Director: John Turner Service: Full Service
 Location: Mount Tallac Crematorium 0

Initial Information | Service Details | Music | Deceased Details | Applicant | Medical | Disposal | Memorials | Misc. | Finance

Organist: [Dropdown] View Select Clear
 Surname: [Text]
 Event: 07 - On Cue Category: [Dropdown]
 Type: Soloist (Instrumental) Composer: [Dropdown]
 Comments: Family Member to perform Song: [Dropdown]
 Add to Library [Button] Delete Music [Button] Add Music [Button]

00 - Holding ICD Family's choice
 01 - Entry Wesley Clair De Lune (Claude Debussy) Play quietly
 02 - On Cue Soloist Someone Like You (Adele) Family Member to sing
 05 - Commit Wesley In My Life (Beatles) Continue until the end
 07 - On Cue Soloist Unforgettable (Nat King Cole) Family Member to perform

1. The Event will be added to the music list displayed in the bottom half of the screen and the new music title will be added to the Music Library for selection the next time it is requested.
2. Click on the **Save** button
3. Click on the **Exit** button to leave the booking and return to the diary page

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Amend a Music entry on a Booking

	<p>NOTE: These pages are applicable to a Cremation, Burial or Scattering booking.</p>																																																																		
	<ol style="list-style-type: none"> 1. elect Diary from the Outlook bar on the left hand side. 2. Select Show Diary from the expanded selection. 																																																																		
<table border="1"> <thead> <tr> <th>Time</th> <th>Title</th> <th>Comments</th> <th>Process</th> <th>Agent</th> <th>Location</th> </tr> </thead> <tbody> <tr> <td>09:00</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>09:30</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>10:00</td> <td>Logan</td> <td></td> <td>Medical Forms Ou...</td> <td>John Turner</td> <td>Mount Tallac Cre</td> </tr> <tr> <td>10:30</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>11:00</td> <td>Hicks</td> <td></td> <td></td> <td>T. R. Harris Funeral Services</td> <td>Mount Tallac Cre</td> </tr> <tr> <td>11:30</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>12:00</td> <td>Hope</td> <td></td> <td>Application Recei...</td> <td>Cooksan and Smythe Funeral ...</td> <td>Mount Tallac Cre</td> </tr> <tr> <td>12:30</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>13:00</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>13:30</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Time	Title	Comments	Process	Agent	Location	09:00						09:30						10:00	Logan		Medical Forms Ou...	John Turner	Mount Tallac Cre	10:30						11:00	Hicks			T. R. Harris Funeral Services	Mount Tallac Cre	11:30						12:00	Hope		Application Recei...	Cooksan and Smythe Funeral ...	Mount Tallac Cre	12:30						13:00						13:30						<ol style="list-style-type: none"> 1. The <i>Appointment Diary</i> screen will be displayed. 2. Select the correct <i>Diary</i> for the booking 3. Select the <i>Date</i> of the booking 4. All bookings for that diary page for that date will be displayed 5. Double click on the time of the booking in question
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Cremation

Deceased : Mr George Fisher Logan Date : Wed, 04/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium

Initial Information Service Details **Music** Deceased Details Applicant Medical Disposal Memorials Misc Finance

Appointment 1904_2503 Deceased 3715

* Date : 04/02/2015 Client Request

* Time : 10:00

Privacy : Public

Status : Medical Forms Outstanding

* Diary : Mount Tallac Crematorium

* Location : Mount Tallac Crematorium

Type of Service : Full Service

View Funeral Dir. Private Clear

Funeral Director : John Turner

Deceased

Title : Mr Address

Forenames : George Fisher

Surname : Logan

Maidenname :

Other name :

Address Line 1 : 6 Bond Street,

Address Line 2 : Tahoe,

Address Line 3 : Sussex

Address Line 4 :

Address Line 5 :

Address Line 6 :

Post Code : BN6 8TF + Add

Comments :

1. The booking will open on the *Initial Info* tab
2. **NOTE:** The names and position of the other tabs in the picture below may vary from what you can see on your screen depending on whether you are amending a cremation, burial or scattering – don't worry about this.
3. Click on the **Music** Tab
4. Click on the **Edit** pencil

Cremation

Deceased : Mr George Fisher Logan Date : Fri, 06/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium

Initial Information Service Details Music Deceased Details Applicant Medical Disposal Memorials Misc Finance

Organist : View Select Clear

Surname :

Event : 02 - On Cue Category :

Type : Soloist(Vocal) Composer :

Comments : Someone Like You (Adele) Family Member to sing Song :

Add to Library Delete Music Add Music

00 - Holding ICD Family's choice

01 - Entry Wesley Clair De Lune (Claude Debussy) Play quietly

02 - On Cue Soloist Someone Like You (Adele) Family Member to sing

03 - Committ Wesley In My Life (Beatles) Continue until the end

07 - On Cue Soloist Unforgettable (Nat King Cole) Family Member to perform

1. The Music for the booking will be displayed.
2. The simplest way to amend a music entry is add a correct entry first and then delete the incorrect entry as follows:
3. Click on the Music event that you wish to correct
4. The incorrect details of the entry will be displayed in the *Event Type* and *Comments* fields in the top half of the screen

Cremation

Deceased : Mr George Fisher Logan Date : Fri, 06/02/2015 Time : 10:00

Funeral Director : John Turner Service : Full Service

Location : Mount Tallac Crematorium

Initial Information Service Details Music Deceased Details Applicant Medical Disposal Memorials Misc Finance

Organist : View Select Clear

Surname :

Event : 02 - On Cue Category :

Type : CD Composer :

Comments : Someone Like You (Adele) Song :

Add to Library Delete Music Add Music

00 - Holding ICD Family's choice

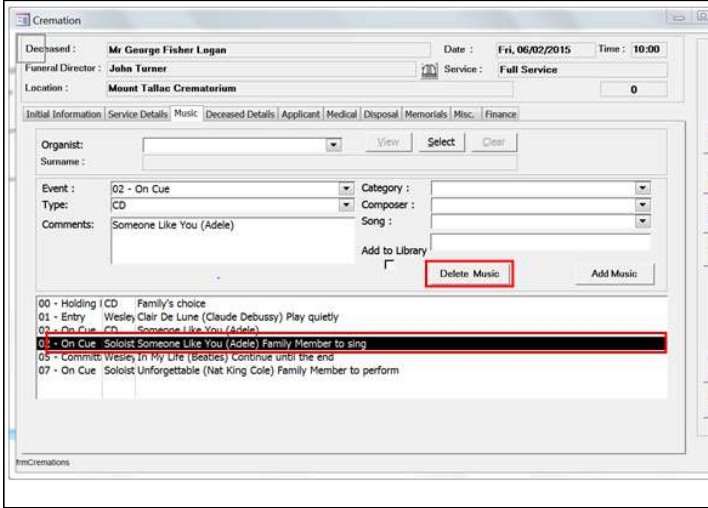
01 - Entry Wesley Clair De Lune (Claude Debussy) Play quietly

02 - On Cue Soloist Someone Like You (Adele) Family Member to sing

05 - Committ Wesley In My Life (Beatles) Continue until the end

07 - On Cue Soloist Unforgettable (Nat King Cole) Family Member to perform

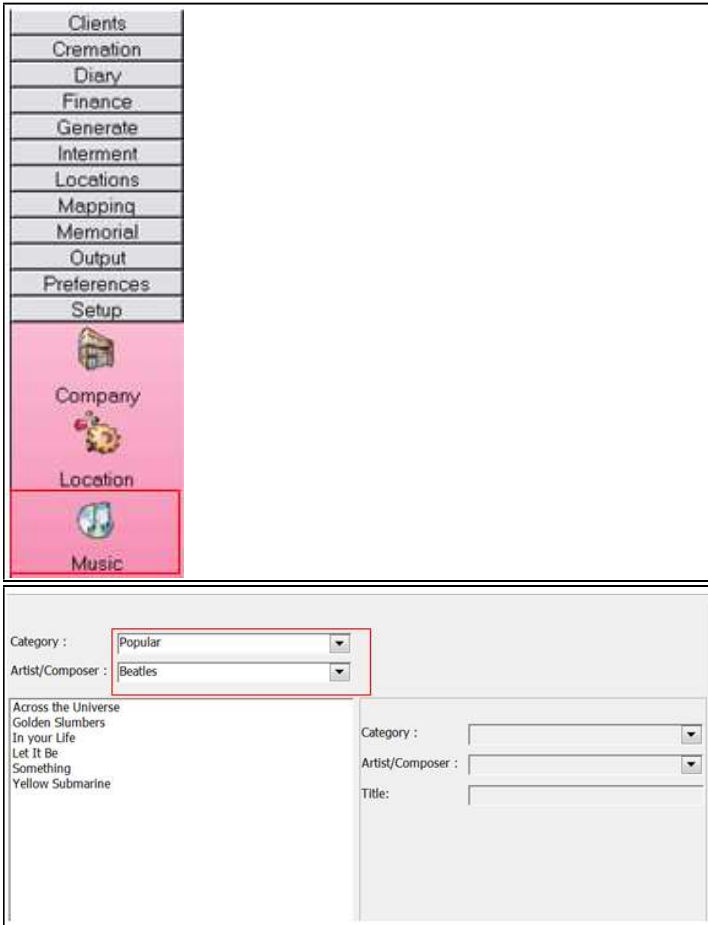
1. Correct the appropriate field(s)
2. Click on **Add Entry** to add the corrected Music Event



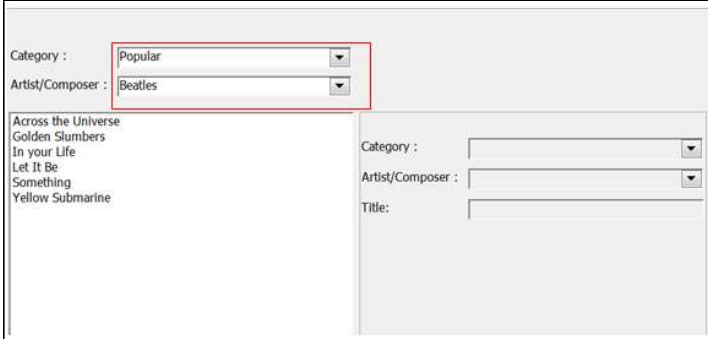
1. The corrected Event will be added to the music list displayed in the bottom half of the screen.
2. Click on the incorrect entry to select it
3. Click on **Delete Music**
4. The incorrect Event will be removed from the music list displayed in the bottom half of the screen.
5. Click on the **Save** button
6. Click on the **Exit** button to leave the booking and return to the diary page

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Amend a Music title



1. Select **Setup** from the *Outlook bar* on the left hand side.
2. Select **Music** from the expanded selection.



1. The *Media* screen will be displayed.
2. Select the *Category* for the Music title
3. Select the *Artist/Composer* for the Music title





	<ol style="list-style-type: none"> 1. A list of the music titles for that category and artist will be displayed 2. Select the music title to be amend 3. Click on the edit pencil field
	<ol style="list-style-type: none"> 1. Click into the title field on the right hand side and amend it 2. Click on Save
	<ol style="list-style-type: none"> 1. Your amendment will now appear on the left hand side of the screen 2. Repeat the previous 2 steps to amend another title for this artist OR 3. Click on the Close button to return to the main screen.

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Add a new music title from SETUP





	<p>NOTE: A new title can also be added from the Music tab of the booking</p>
	<p>Select Setup from the <i>Outlook bar</i> on the left hand side.</p> <p>Select Music from the expanded selection</p>

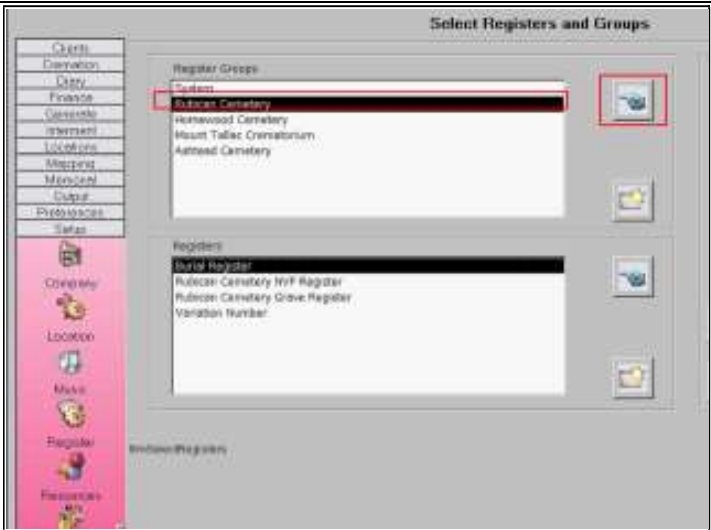
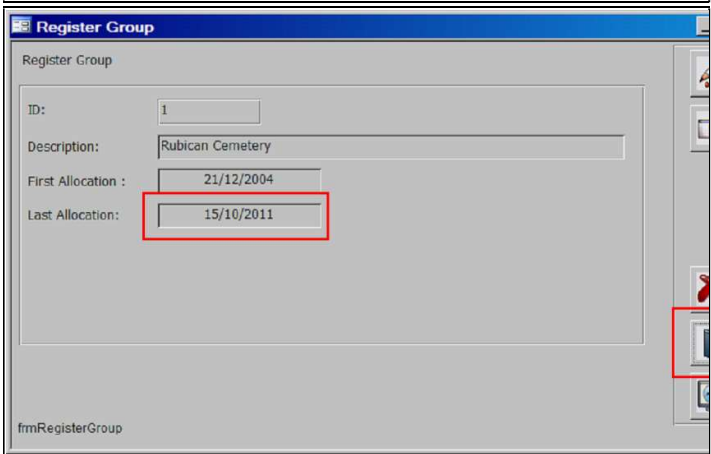
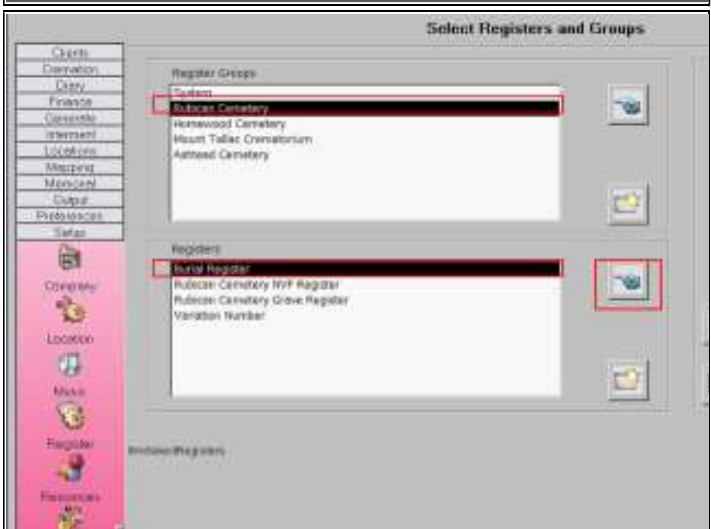
<p align="center">Media</p> <p>Category : <input type="text"/></p> <p>Artist/Composer : <input type="text"/></p> <div> <div> 1812 Overture - By Tchaikovsky 4th Movement of Spring from Vivaldi's Four Seasons 633 Squadron - R Goodwin A Certain Smile by Johnny Mathis A Life On The Ocean Wave - By The Royal Marine Band A Little White Cloud That Cried - By Johnnie Ray A Prayer for St Patrick A Star Is Born - By Ronald Binge A Suitable March from Coldstream Guards A Summers Song by Chas and Jeremy A Thing Called Love by Johnny Cash A World Without You - Bobby Darin Abba The way old friends Are Abide with Me Abide With Me - Non Choral Version Abide with Me (5v) Choral Abide with Me by Emeli Sande Academic Festival Overture OP 80 - By Johannes Brahms Adagio in G Minor Albinoni ASM Marriner After All These Years - By Daniel O'Donnell Agnus Dei frmMedia </div> <div> Category : <input type="text"/> Artist/Composer : <input type="text"/> Title: <input type="text"/> </div> </div>	<p>The <i>Media</i> screen will be displayed</p> <p>Click on the New button</p>
<p align="center">Media</p> <p>Category : <input type="text"/></p> <p>Artist/Composer : <input type="text"/></p> <div> <div> 1812 Overture - By Tchaikovsky 4th Movement of Spring from Vivaldi's Four Seasons 633 Squadron - R Goodwin A Certain Smile by Johnny Mathis A Life On The Ocean Wave - By The Royal Marine Band A Little White Cloud That Cried - By Johnnie Ray A Prayer for St Patrick A Star Is Born - By Ronald Binge A Suitable March from Coldstream Guards A Summers Song by Chas and Jeremy A Thing Called Love by Johnny Cash A World Without You - Bobby Darin Abba The way old friends Are Abide with Me frmMedia </div> <div> Category : <input type="text" value="Popular"/> Artist/Composer : <input type="text" value="Adele"/> Title: <input type="text" value="Chasing Pavements"/> </div> </div>	<p>Select the <i>Category</i> from the <i>Category</i> selection list</p> <p>Select the <i>Composer or Artist</i> from the <i>Artist or Composer</i> selection list. If the artist or composer does not appear on the selection list Type in the name of the composer/artist.</p> <p>Type in a title for that Artist or Composer in the <i>Title</i> field</p> <p>Click on Save</p>
<p align="center">Media</p> <p><input type="checkbox"/></p> <p>Category : <input type="text" value="Popular"/></p> <p>Artist/Composer : <input type="text" value="Adele"/></p> <div> <div> <input checked="" type="checkbox"/> Chasing Pavements <input type="checkbox"/> Someone Like You </div> <div> Category : <input type="text" value="Popular"/> Artist/Composer : <input type="text" value="Adele"/> Title: <input type="text" value="Chasing Pavements"/> </div> </div>	<p>Your entry will now appear on the left hand side of the screen</p> <p>Click on Save to confirm this entry</p> <p>Repeat the previous 2 steps to add another new title or composer or</p> <p>Click on the Close button to return to the main screen.</p>

<div>Setup</div> <div>  </div> <div>Company</div> <div>  </div> <div>Location</div> <div>  </div> <div>Music</div> <div>  </div> <div>Register</div>	Register <ul style="list-style-type: none"> • To set the last register number for cremations/burials • Set Up A Grave Grant Register for a Single Cemetery • Set Up A Grave Grant Register shared over 2 or more cemeteries
--	---

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To set the last register number for cremations/burials

<div> <div>Clients</div> <div>Cremation</div> <div>Diary</div> <div>Finance</div> <div>Generate</div> <div>Interment</div> <div>Locations</div> <div>Mapping</div> <div>Memorial</div> <div>Output</div> <div>Preferences</div> <div>Setup</div> <div>  </div> <div>Company</div> <div>  </div> <div>Location</div> <div>  </div> <div>Music</div> <div>  </div> <div>Register</div> </div>	<p>Select Setup from the Outlook bar on the left hand side Select Register from the expanded selection</p>
---	--

	<p>The Select Register and Groups screen will be displayed</p> <p>Select the Diary from the list under Register Groups heading</p> <p>Click on the top Finger</p>
	<p>The Register Group window will open</p> <p>Make a note of Last Allocation Date recorded by BACASNG for this diary</p> <p>Click on the Close Button</p>
	<p>You will be returned to the Select Register and Groups screen</p> <p>Ensure the correct Diary is still selected from the list under the Register Groups heading</p> <p>Select the correct Register under the Registers heading</p> <p>Click on the bottom Finger</p>

The screenshot shows the 'Register' window with the following fields:

- Register Group ID: 1
- Register Group: Rubicon Cemetery
- Type: Burial Numbers
- Description: Burial Register
- First Number: 1
- Last Number: 1161

A red box highlights the 'Edit Pencil' icon in the top right corner of the window.

The register window will open
Click on the Edit Pencil.

The screenshot shows the 'Register' window with the 'Last Number' field highlighted by a red box. The value is 1161. The 'Edit Pencil' icon is also highlighted by a red box.

Amend Last Number to reflect the last burial or cremation number in the diary for the date noted in step 5. (If you are unsure refer to paper register or go to the diary page for the date noted in step 5 and double click on the time for the last appointment to check the correct register number.)

Click on Save Button


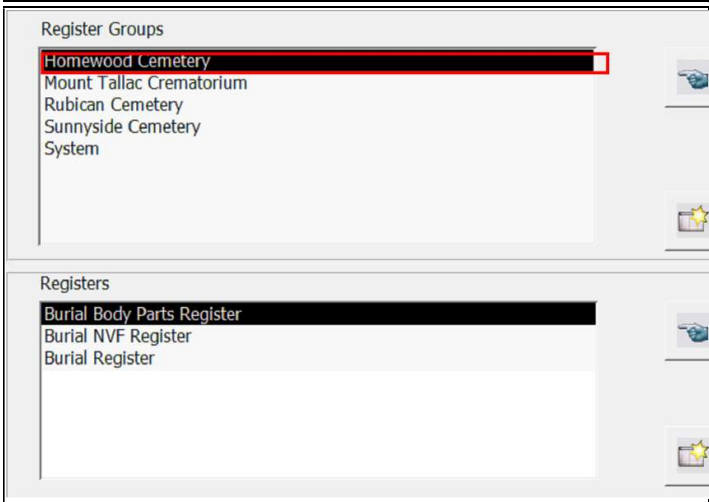
Click on Close Button

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Set Up A Grave Grant Register for a Single Cemetery

An empty rectangular box intended for additional information or notes.

NOTE: follow these notes if you have only one cemetery or if you have more than one cemetery but each cemetery will have its own register.

	<p>Select Setup from the <i>Outlook bar</i> on the left hand side.</p> <ol style="list-style-type: none"> 1. Select Register from the expanded selection.
	<p>The <i>Select Register and Groups</i> screen will be displayed.</p> <ol style="list-style-type: none"> 1. Select the <i>Cemetery</i> from the list under Register Groups heading <p>The list of registers set up for this group will be displayed in the lower panel.</p> <ol style="list-style-type: none"> 2. If there isn't a Grave Grant register already set up click on the bottom New button

Register

Register Group ID: 2

Register Group: Homewood Cemetery

Type: Grave Grant

Description: Grave Grant Register

First Number: 50

Last Number: 49

frmRegister

The *Register* screen will open

1. Select **Grave Grant** as type from the drop-down selection list
2. Enter the description *Grave Grant Register*
3. Set the *Last Number* at a value of 1 less than the next grant number you want to issue for this cemetery (For example if the next grant you issue will be 50 then set last number as 49)
4. Set the *First Number* at a value of 1 higher than the *Last number*
5. Click on **Save**
6. Click on **Exit**

Generate

Interment

Locations

Mapping

Memorial

Output

Preferences

Setup

Company

Location

1. Select **Setup** from the *Outlook* bar on the Left hand side of the screen
2. Click on **Location**

Main Location : Homewood Cemetery

Mont Tiliac Cemetery

Mount Tiliac Crematorium

Rubican Cemetery

Sunnyside Cemetery

Sub Location : AA

AAB

Section B General

Square 1

Square 2

Square 3

Square 4

Square 5

1. Click on the *Cemetery* name under *Main Location*
2. Click on the **Pointing finger** to select the cemetery.

The screenshot shows the 'Main Location' window with the following details:

- ID: 2
- Description: Homewood Cemetery
- Region: East
- Duplicate Grave Check: Query Grave Dupli
- Use Sub Locations: ☒
- Main Office Details: Homewood Cemetery
- Local Office Details: Homewood Cemetery
- Death Register: Homewood Cemetery
- Grave Register: System
- VO Register: Rubican Cemetery
- Exhumation Register: System
- Grant Register: System

The *Main Location* Screen will open

1. Click on the **Pencil**

The screenshot shows the 'Main Location' window with the following details:

- ID: 2
- Description: Homewood Cemetery
- Region: East
- Duplicate Grave Check: Query Grave Dupli
- Use Sub Locations: ☒
- Main Office Details: Homewood Cemetery
- Local Office Details: Homewood Cemetery
- Death Register: Homewood Cemetery
- Grave Register: System
- VO Register: Rubican Cemetery
- Exhumation Register: System
- Grant Register: Homewood Cemetery

1. Change *Grant Register* to reflect the cemetery name
2. Click on **Save**
3. Click on the **Exit** button

The grant register for this cemetery is now set up


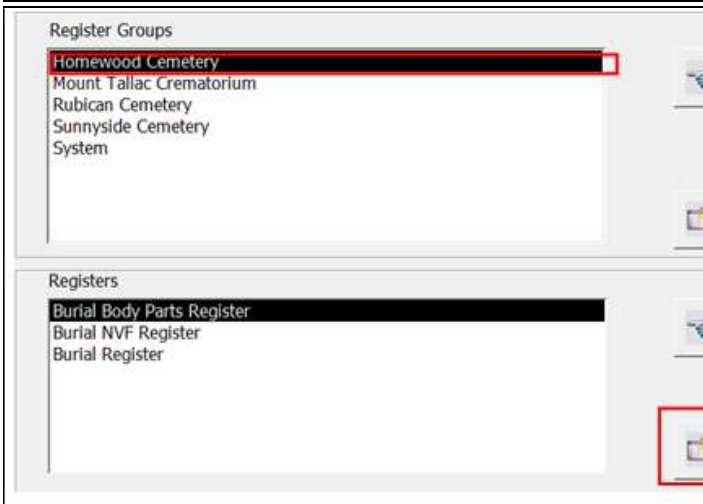
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Set Up A Grave Grant Register shared over 2 or more cemeteries

This is an empty screenshot of the 'Main Location' window, showing no data or settings.

NOTE 1: Follow these notes if you have more than one cemetery and they are to share the same register.

NOTE 2: Only one cemetery (the "main" cemetery) will have a register set up by this. The second and any subsequent cemeteries must be pointed to the "main" cemetery grant register.

	<ol style="list-style-type: none"> 1. Select Setup from the <i>Outlook bar</i> on the left hand side. 2. Select Register from the expanded selection.
	<p>The <i>Select Register and Groups</i> screen will be displayed.</p> <ol style="list-style-type: none"> 1. Select the "main" <i>Cemetery</i> from the list under Register Groups heading The list of registers set up for this group will be displayed in the lower panel. 2. If there isn't a Grave Grant register already set up click on the bottom New button

Register

Register Group ID: 2

Register Group: Homewood Cemetery

Type: Grave Grant

Description: Grave Grant Register

First Number: 50

Last Number: 49

frmRegister

The *Register* screen will open

1. Select **Grave Grant** as type from the drop-down selection list
2. Enter the description *Grave Grant Register*
3. Set the *Last Number* at a value of 1 less than the next grant number you want to issue. (For example if the next grant you issue will be numbered 50 then set last number as 49)
4. Set the *First Number* at a value of 1 higher than the *Last number*
5. Click on **Save**
6. Click on **Exit**

Clients

Cremation

Diary

Finance

Generate

Interment

Locations

Mapping

Memorial

Output

Preferences

Setup

Company

Location

Music

Main Location : Homewood Cemetery

Sub Location : AA

frmMainLocations

1. Select **Setup** from the *Outlook* bar on the Left hand side of the screen
2. Click on **Location**
3. Click on the "main" *Cemetery* name under *Main Location*
4. Click on the **Pointing finger** to select the "main" cemetery

Main Location

ID: 2

Description: Homewood Cemetery

Region: East

Duplicate Grave Check: Query Grave Dupl...

Use Sub Locations: ☒

Main Office Details: Homewood Cemetery

Local Office Details: Homewood Cemetery

Death Register: Homewood Cemetery

Grave Register: System

VO Register: Rubican Cemetery

Exhumation Register: System

Grant Register: System

frmMainLocations

The *Main Location* Screen will open

1. Click on the **Pencil**

The screenshot shows the 'Main Location' window for 'Homewood Cemetery'. The 'ID' is 2, 'Description' is 'Homewood Cemetery', and 'Region' is 'East'. The 'Grant Register' dropdown is highlighted with a red box, showing 'Homewood Cemetery' selected.

1. Change *Grant Register* to reflect the "main" cemetery name
2. Click on **Save**
3. **Click on the Exit button**

The grant register for the "main" cemetery is now set up. Follow the steps below to point the second and any subsequent cemeteries to the "main" cemetery grant register.

The screenshot shows the 'Main Location' window with a list of locations on the right. 'Mont Tallac Cemetery' is selected in the list. The 'Location' button in the left sidebar is highlighted with a red box.

1. Select **Setup** from the *Outlook* bar on the Left hand side of the screen
2. Click on **Location**
3. Click on the "second" Cemetery name under *Main Location*
4. Click on the **Pointing finger** to select to select the "second" cemetery

The screenshot shows the 'Main Location' window for 'Mont Tallac Cemetery'. The 'ID' is 4, 'Description' is 'Mont Tallac Cemetery', and 'Region' is 'East'. The 'Grant Register' dropdown is highlighted with a red box, showing 'Homewood Cemetery' selected.

The *Main Location* screen for the "second" cemetery will open

1. Click on the **Pencil**

The screenshot shows the 'Main Location' window for 'Mont Tallac Cemetery'. The 'ID' is 4, 'Description' is 'Mont Tallac Cemetery', and 'Region' is 'East'. The 'Grant Register' dropdown is highlighted with a red box, showing 'Homewood Cemetery' selected.

1. Change *Grant Register* to reflect the "main" cemetery name
2. Click on **Save**
3. Click on **Exit**


1. Repeat the previous steps for any subsequent cemeteries that are to share the grant register.

Resources


	<p>Resources</p> <ul style="list-style-type: none"> • Add A Frequent Value to a Category • Rename a Day Type • Set Up A Category • Set up a Memorial Resource Group • Set up a Miscellaneous Resource Group • Set up a new Miscellaneous Item • Set up a new Type of Memorial • Set up a new type of Grave • Set up a new type of Service • Set up Medical Inspectors • Set up Medical Referee Payment • Set up Miscellaneous Booking Notes • Setup Organist Payment
---	--


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Add A Frequent Value to a Category

	<p>NOTE: Categories can be set up to record additional information under the miscellaneous tab of a booking. For example, a donation category will allow you record the charity that will benefit from a collection at the service.</p>
	<p>Select SetUp from the <i>Outlook bar</i> on the left hand side.</p> <p>Select Resources from the expanded selection.</p>

Resource Selection

Resource Groups			
Book of Remembrance		Description:	Book of Remembrance
Book of Remembrance - Cards		Start Date :	01/01/1980
Book of Remembrance - Personal Book		End Date :	31/12/9999
Burial			
Burial of Cremated Remains			

Resources			
Book of Remembrance (11 Line with Motif)		Description:	Book of Remembrance (11 Line)
Book of Remembrance (11 Line)		Start Date :	01/01/1980
Book of Remembrance (14 Line)		End Date :	31/12/9999
Book of Remembrance (14 Line with Motif)			
Book of Remembrance (2 Line)			
Book of Remembrance (6 Line with Motif)			

The *Resource Selection* screen will be displayed. This will list all existing resource groups.

Check that the category you wish to use doesn't already exist in the Resource Group list. Click on the **New** Resource Group button


Edit Resource Group

ID: 32

Description: Donations

Type of Group : Category

Start Date: 01/01/1980 End Date: 31/12/9999



frmResourceGroup


The *Edit Resource Group* window will be displayed.

Enter a name for the category as the *description*.


Select *Category* as the Type of Group

Click on **Save**

Resource Groups

		Type: Category	
Cremation Containers		Description:	Donations
Cremation Memorials		Start Date :	01/01/1980
Day Types		End Date :	31/12/9999
Diary Pages			
Donations			

Resources



The new category will be highlighted under Resource Group

You can now enter some frequent values for the category you have just created. For example for a Donations category you may wish to add the most popular Charites:

Click on the **New Resource button**

ID:
 Resource Group : Donations
 Description: East Grinstead Hospice
 Start Date: 01/01/1980 End Date: 31/12/9999
 Save
 Exit

The *Edit Resource* Screen will open

Enter a frequent value in the *Description* field.

Click on **Save**

Repeat the previous step to add more Frequent values if desired

Click on the **Exit** button

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Rename a Day Type

Clients
 Cremation
 Diary
 Finance
 Generate
 Interment
 Locations
 Mapping
 Memorial
 Output
 Preferences
 Setup
 Company
 Location
 Music
 Register
 Resources
 Security

Select **SetUp** from the *Outlook bar* on the left hand side.

1. Select **Resources** from the expanded selection.

The *Resource Selection* screen will be displayed. This will list all existing resource groups.

1. Use the Resource Group scroll bar to search for the Resource Group *Day Types*
2. Click on the Resource Group *Day Types* to select it


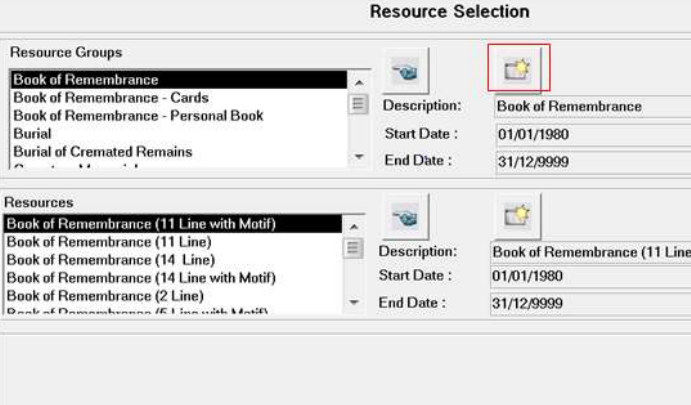
1. From the **Resources** list, click on the Day type you wish to rename to highlight it
2. Click on the **Pointing Finger**

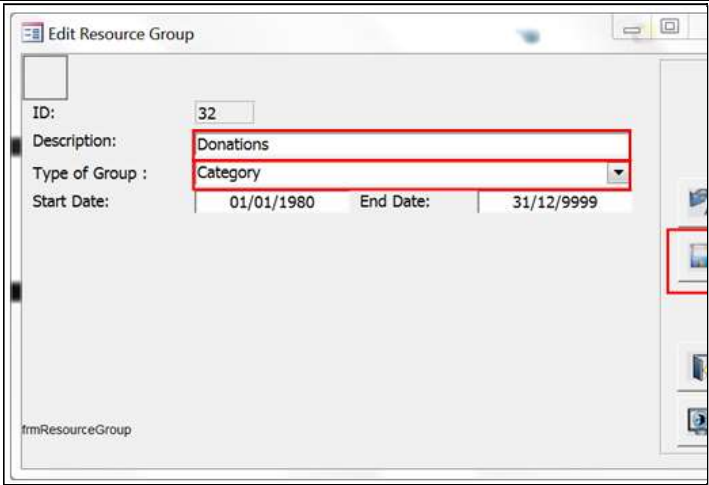
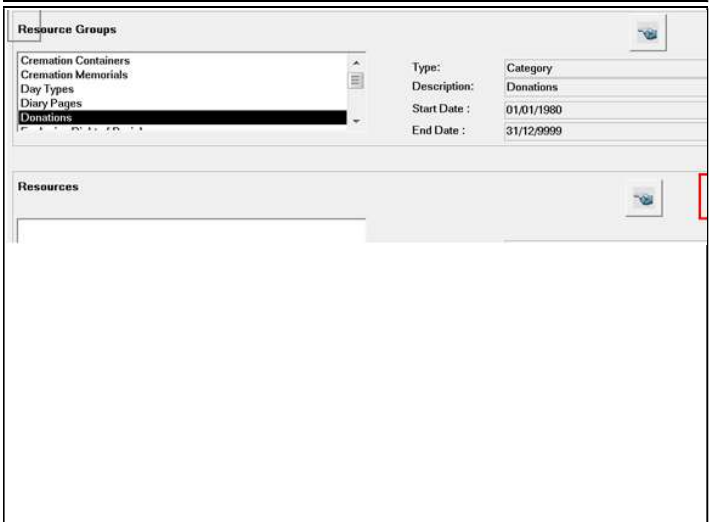
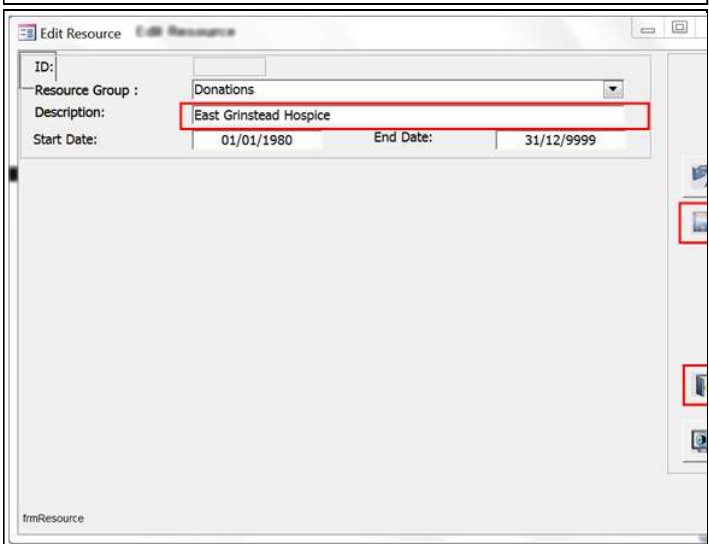
The *Edit Resource* Screen will open


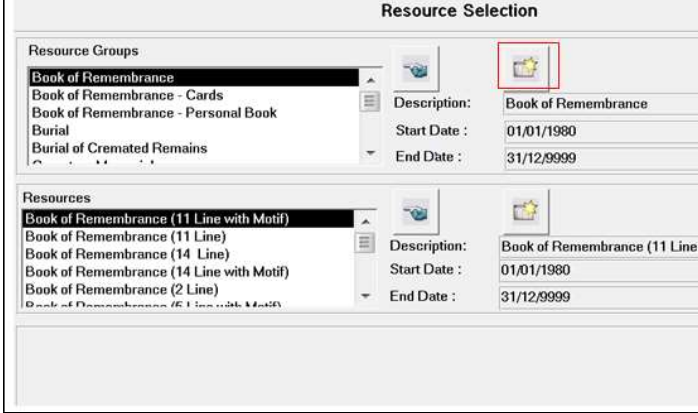
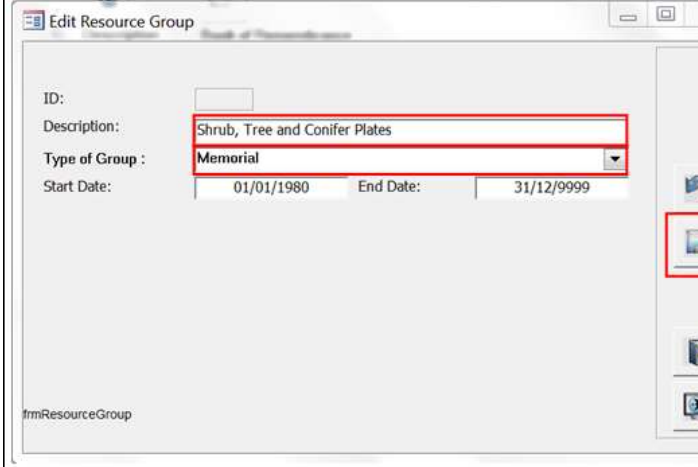
1. Click on the **Edit** button

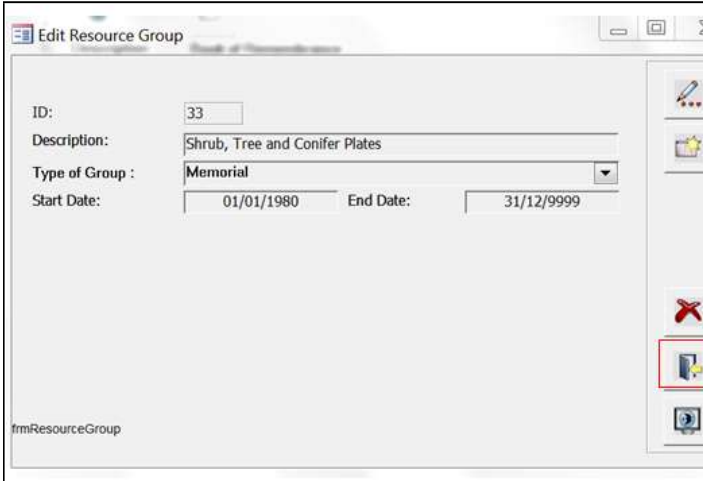
1. Enter the new name for the Day type in the *Description* field
2. Click on **Save**
3. Click on **Close**

Set Up A Category

	<p>NOTE: Categories can be set up to record additional information under the miscellaneous tab of a booking. For example, a donation category will allow you record the charity that will benefit from a collection at the service.</p>
	<p>Select SetUp from the <i>Outlook bar</i> on the left hand side.</p> <p>Select Resources from the expanded selection.</p>
	<p>The <i>Resource Selection</i> screen will be displayed. This will list all existing resource groups.</p> <p>Check that the category you wish to use doesn't already exist in the Resource Group list. Click on the New Resource Group button</p>

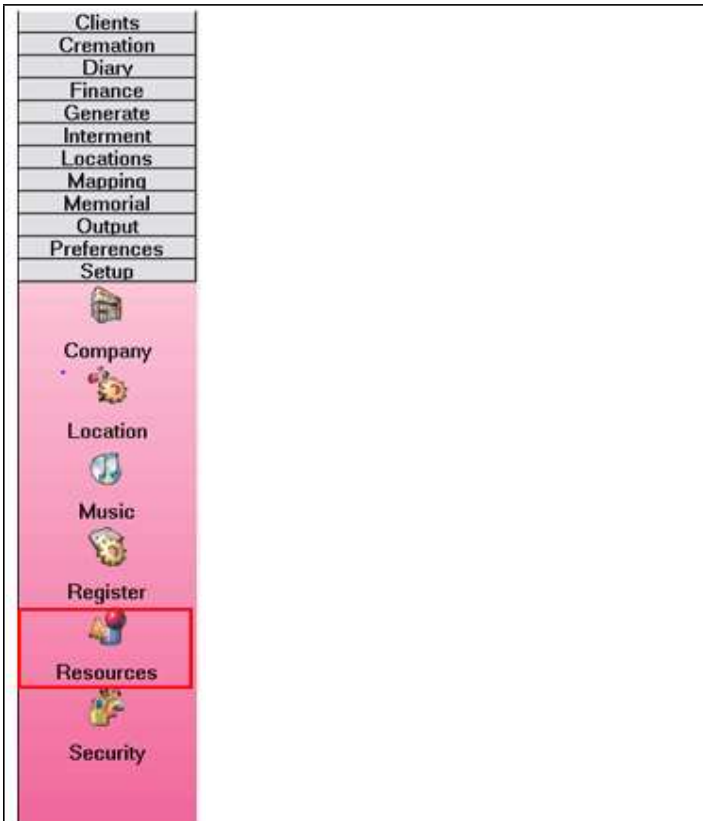
	<p>The <i>Edit Resource Group</i> window will be displayed.</p> <p>Enter a name for the category as the <i>description</i>.</p> <p>Select <i>Category</i> as the Type of Group</p> <p>Click on Save</p>
	<p>The new category will be highlighted under Resource Group</p> <p>You can now enter some frequent values for the category you have just created. For example for a Donations category you may wish to add the most popular Charities:</p> <p>Click on the New Resource button</p>
	<p>The <i>Edit Resource</i> Screen will open</p> <p>Enter a frequent value in the <i>Description</i> field.</p> <p>Click on Save</p> <p>Repeat the previous step to add more frequent values for the category if desired</p> <p>Click on the Exit button</p>

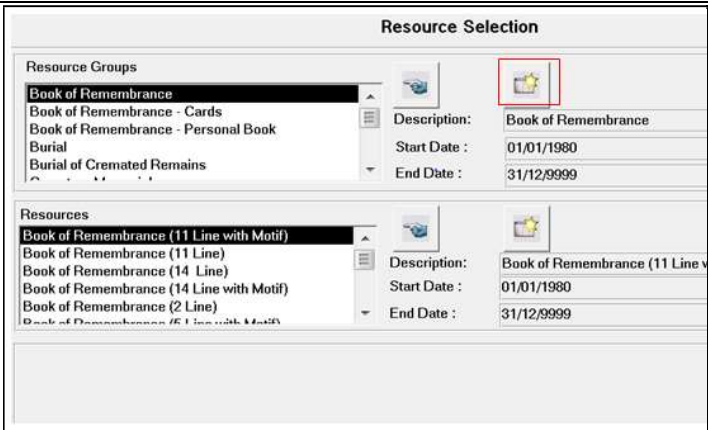
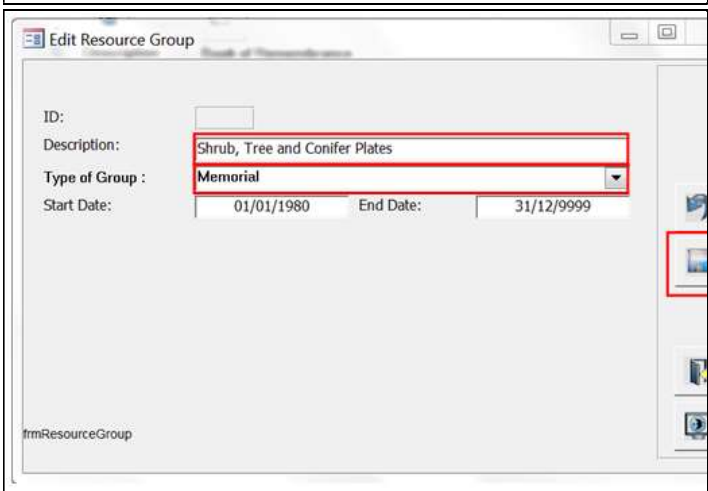
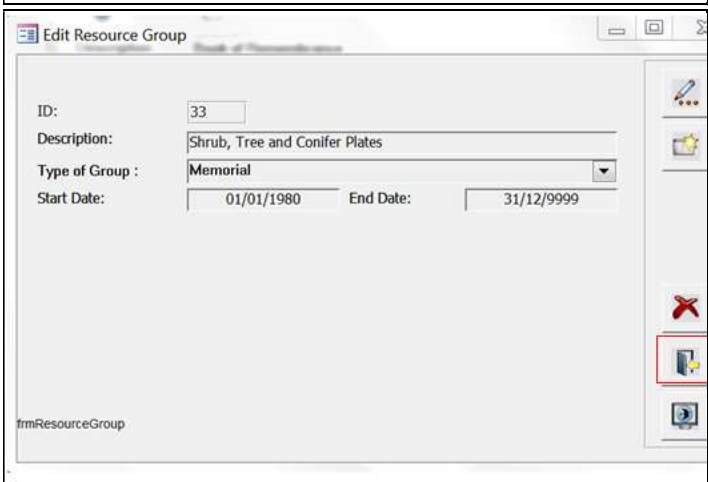
	<ol style="list-style-type: none"> 1. Select SetUp from the <i>Outlook bar</i> on the left hand side. 2. Select Resources from the expanded selection. 3. The <i>Resource Selection</i> screen will be displayed. (This will list all existing resource groups.)
	<p>Click on the New Resource Group button</p>
	<p>The <i>Edit Resource Group</i> window will be displayed.</p> <ol style="list-style-type: none"> 1. Enter a description for the new Memorial Resource Group 2. Select <i>Memorial</i> as the Type of Group Type in a description of the fee you are adding in the <i>Description</i> field 3. Click on Save


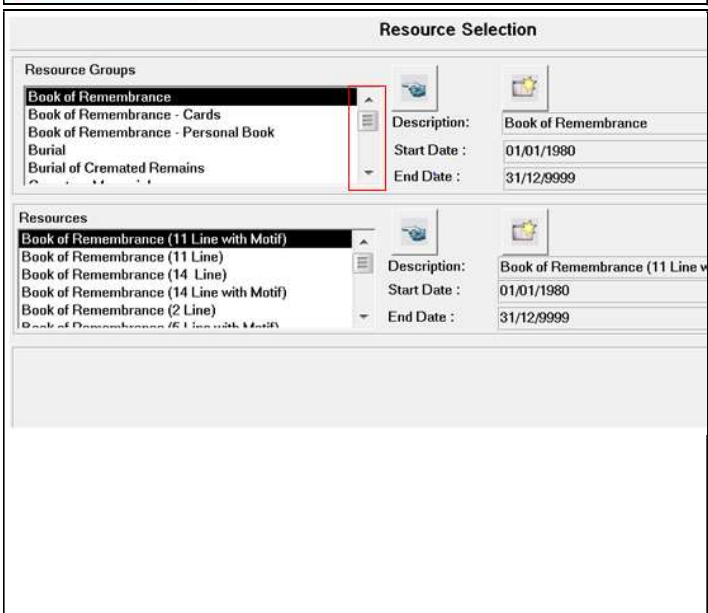
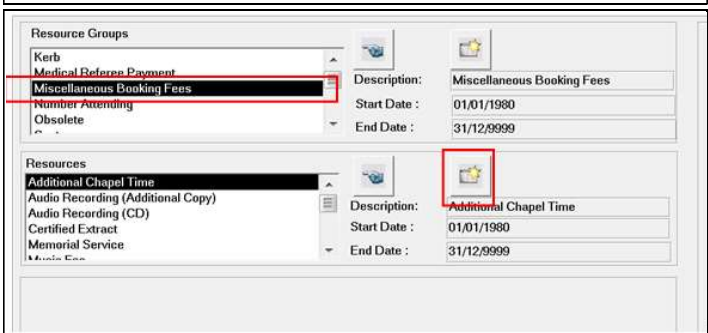
	<ol style="list-style-type: none"> 1. Click on the Close button
---	---

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Set up a Miscellaneous Resource Group

	<p>NOTE: If you have many different types of memorials, it is a good idea to organise these in memorial resource groups for reporting purposes. For example different types of memorial plates: single and double tree, rose and conifer plates might be held in a resource group named "Shrub, Tree and Conifer Plates".</p> <ol style="list-style-type: none"> 1. Select SetUp from the <i>Outlook bar</i> on the left hand side. 2. Select Resources from the expanded selection.
--	--

	<p>1. The <i>Resource Selection</i> screen will be displayed. (This will list all existing resource groups.)</p> <ol style="list-style-type: none"> 1. Click on the New Resource Group button
	<p>The <i>Edit Resource Group</i> window will be displayed.</p> <ol style="list-style-type: none"> 1. Enter a description for the new Memorial Resource Group 2. Select <i>Miscellaneous</i> as the Type of Group Type in a description of the fee you are adding in the <i>Description</i> field 3. Click on Save
	<p>Click on the Close button</p>

 <p> Clients Cremation Diary Finance Generate Interment Locations Mapping Memorial Output Preferences Setup Company Location Music Register Resources Security </p>	<p>NOTE: A miscellaneous item can be set up in BACAS to be used in addition to the regular booking fees and can be added to a booking as needed</p> <ol style="list-style-type: none"> 1. Select SetUp from the <i>Outlook bar</i> on the left hand side. 2. Select Resources from the expanded selection. 																						
 <p>Resource Selection</p> <p>Resource Groups</p> <table border="1"> <tr> <td>Book of Remembrance</td> <td>Description: Book of Remembrance</td> </tr> <tr> <td>Book of Remembrance - Cards</td> <td>Start Date : 01/01/1980</td> </tr> <tr> <td>Book of Remembrance - Personal Book</td> <td>End Date : 31/12/9999</td> </tr> <tr> <td>Burial</td> <td></td> </tr> <tr> <td>Burial of Cremated Remains</td> <td></td> </tr> </table> <p>Resources</p> <table border="1"> <tr> <td>Book of Remembrance (11 Line with Motif)</td> <td>Description: Book of Remembrance (11 Line with Motif)</td> </tr> <tr> <td>Book of Remembrance (11 Line)</td> <td>Start Date : 01/01/1980</td> </tr> <tr> <td>Book of Remembrance (14 Line)</td> <td>End Date : 31/12/9999</td> </tr> <tr> <td>Book of Remembrance (14 Line with Motif)</td> <td></td> </tr> <tr> <td>Book of Remembrance (2 Line)</td> <td></td> </tr> <tr> <td>Book of Remembrance (5 Line with Motif)</td> <td></td> </tr> </table>	Book of Remembrance	Description: Book of Remembrance	Book of Remembrance - Cards	Start Date : 01/01/1980	Book of Remembrance - Personal Book	End Date : 31/12/9999	Burial		Burial of Cremated Remains		Book of Remembrance (11 Line with Motif)	Description: Book of Remembrance (11 Line with Motif)	Book of Remembrance (11 Line)	Start Date : 01/01/1980	Book of Remembrance (14 Line)	End Date : 31/12/9999	Book of Remembrance (14 Line with Motif)		Book of Remembrance (2 Line)		Book of Remembrance (5 Line with Motif)		<p>The <i>Resource Selection</i> screen will be displayed. This will list all existing resource groups. Use the Resource Groups scroll bar to search for the logical miscellaneous Resource group in which to set up your new miscellaneous item.</p> <ol style="list-style-type: none"> 1. Click on the Miscellaneous Resource Group to select it (* if a logical resource group for the new type of miscellaneous item doesn't exist then you will need to create this first: Set up A New Miscellaneous Resource Group)
Book of Remembrance	Description: Book of Remembrance																						
Book of Remembrance - Cards	Start Date : 01/01/1980																						
Book of Remembrance - Personal Book	End Date : 31/12/9999																						
Burial																							
Burial of Cremated Remains																							
Book of Remembrance (11 Line with Motif)	Description: Book of Remembrance (11 Line with Motif)																						
Book of Remembrance (11 Line)	Start Date : 01/01/1980																						
Book of Remembrance (14 Line)	End Date : 31/12/9999																						
Book of Remembrance (14 Line with Motif)																							
Book of Remembrance (2 Line)																							
Book of Remembrance (5 Line with Motif)																							
 <p>Resource Selection</p> <p>Resource Groups</p> <table border="1"> <tr> <td>Kerb</td> <td>Description: Miscellaneous Booking Fees</td> </tr> <tr> <td>Medical Referral Payment</td> <td>Start Date : 01/01/1980</td> </tr> <tr> <td>Miscellaneous Booking Fees</td> <td>End Date : 31/12/9999</td> </tr> <tr> <td>Number Amending</td> <td></td> </tr> <tr> <td>Obsolete</td> <td></td> </tr> </table> <p>Resources</p> <table border="1"> <tr> <td>Additional Chapel Time</td> <td>Description: Additional Chapel Time</td> </tr> <tr> <td>Audio Recording (Additional Copy)</td> <td>Start Date : 01/01/1980</td> </tr> <tr> <td>Audio Recording (CD)</td> <td>End Date : 31/12/9999</td> </tr> <tr> <td>Certified Extract</td> <td></td> </tr> <tr> <td>Memorial Service</td> <td></td> </tr> </table>	Kerb	Description: Miscellaneous Booking Fees	Medical Referral Payment	Start Date : 01/01/1980	Miscellaneous Booking Fees	End Date : 31/12/9999	Number Amending		Obsolete		Additional Chapel Time	Description: Additional Chapel Time	Audio Recording (Additional Copy)	Start Date : 01/01/1980	Audio Recording (CD)	End Date : 31/12/9999	Certified Extract		Memorial Service		<p>Click on the New Resource Button</p>		
Kerb	Description: Miscellaneous Booking Fees																						
Medical Referral Payment	Start Date : 01/01/1980																						
Miscellaneous Booking Fees	End Date : 31/12/9999																						
Number Amending																							
Obsolete																							
Additional Chapel Time	Description: Additional Chapel Time																						
Audio Recording (Additional Copy)	Start Date : 01/01/1980																						
Audio Recording (CD)	End Date : 31/12/9999																						
Certified Extract																							
Memorial Service																							

ID:
 Resource Group : Miscellaneous Booking Fees
 Description: Video Recording (DVD)
 Start Date: 01/01/1980 End Date: 31/12/9999
 Save
 Close

The *Edit Resource* Screen will open

1. Enter a description for the new miscellaneous item
2. Click on **Save**
3. Click on **Close**

nb: Follow this link if you wish to setup a charge associated with this miscellaneous item [Set up A Miscellaneous Charge](#)

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Set up a new Grave Container

Clients
 Cremation
 Diary
 Finance
 Generate
 Interment
 Locations
 Mapping
 Memorial
 Output
 Preferences
 Setup
 Company
 Location
 Music
 Register
 Resources

Select **Setup** from the *Outlook bar* on the left hand side.

Select **Resources** from the expanded selection.

Resource Groups
 Diary Pages
 Donations
 Exclusive Right of Burial
 Grave Containers
 Grave Maintenance
 Resources
 BOOK OF REMEMBRANCE 2 LINE ENTRY
 Type: Memorial
 Description: BOR
 Start Date: 01/01/1980
 End Date: 31/12/9999

The *Resource Selection* screen will be displayed. This will list all existing resource groups. Use the top scroll bar to search for the *Resource Group* named *Grave Containers* (or similar)

Click on the Resource Group *Grave Containers* (or similar) to select it

If you have selected the correct resource group the type of group will display as: *Container Type* (see green box)

A list of Grave Containers will be displayed under *Resources*.

Use the bottom scroll bar to check that the grave container doesn't already exist.

Then click on the bottom **New** button


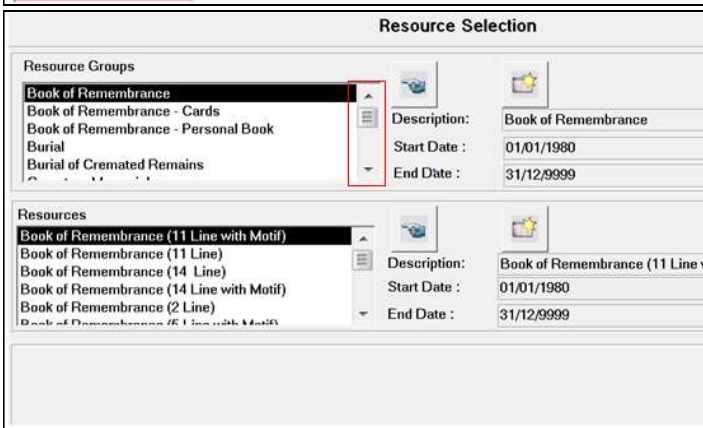
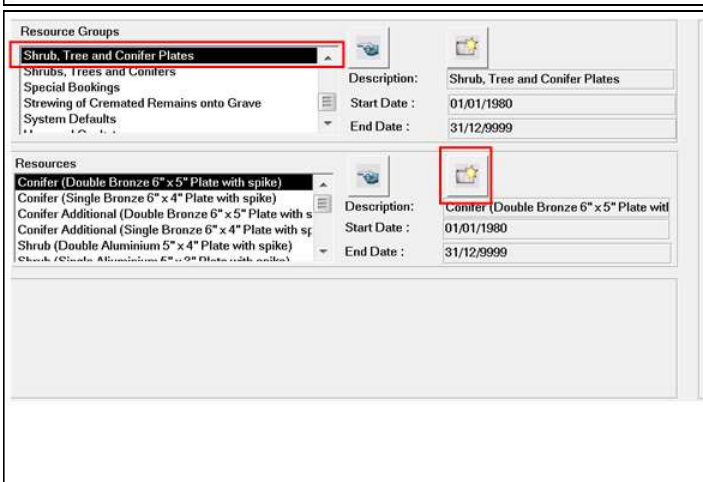
The *Edit Resource* Screen will open:

Enter the description of the new grave container in the *Description* field

Select *Increment Coffins* in the *Increment Count* if you wish remains buried in this container to be counted as a full burial. Select *Increment Ashes* in the *Increment Count* if you wish remains buried in this container to be counted as an ashes burial.

Click on **Save** button

Set up a new Type of Memorial

	<ol style="list-style-type: none"> 1. Select SetUp from the <i>Outlook bar</i> on the left hand side. 2. Select Resources from the expanded selection.
	<ol style="list-style-type: none"> 1. The <i>Resource Selection</i> screen will be displayed. This will list all existing resource groups.
	<ol style="list-style-type: none"> 1. Use the Resource Group scroll bar to search for the logical memorial group for your new type of memorial 2. Click on the Memorial Resource Group to select it (* if a logical resource group for the new type of memorial doesn't exist then you will need to create this first: Create A New Memorial Resource Group) 3. Click on the New Resource Button

Edit Resource	
ID:	
Resource Group :	Shrub, Tree and Conifer Plates
Description:	Tree (Single Bronze 6" x 4" Plate with spike)
Start Date:	01/01/1980
End Date:	31/12/9999
Renewal Months:	60
Generate End Date :	<input type="checkbox"/>
Generate Start Date :	<input type="checkbox"/>
Extract To Palm	<input checked="" type="checkbox"/>

frmResource

1. The *Edit Resource* Screen will open
2. Enter a description for the new type of memorial
3. If the memorial is renewable, enter the renewal period in months (In the example below the renewal period is five years hence 60 months)
4. If you would like this type of memorial to be included in risk assessment then tick *Extract to Palm*
5. Click on **Save**
6. Click on **Close**

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Set up a new type of Grave

<div> <div> Clients Cremation Diary Finance Generate Interment Locations Mapping Memorial Output Preferences Setup </div> <div> Company Location Music Register Resources Security </div> </div>	<ol style="list-style-type: none"> 1. Select SetUp from the <i>Outlook bar</i> on the left hand side. 2. Select Resources from the expanded selection.
--	--

Resource Selection

Resource Groups		Description:	
Book of Remembrance		Book of Remembrance	
Book of Remembrance - Cards		Start Date :	01/01/1980
Book of Remembrance - Personal Book		End Date :	31/12/9999
Burial			
Burial of Cremated Remains			

Resources		Description:	
Book of Remembrance (11 Line with Motif)		Book of Remembrance (11 Line w	
Book of Remembrance (11 Line)		Start Date :	01/01/1980
Book of Remembrance (14 Line)		End Date :	31/12/9999
Book of Remembrance (14 Line with Motif)			
Book of Remembrance (2 Line)			
Book of Remembrance (6 Line with Motif)			

The *Resource Selection* screen will be displayed. This will list all existing resource groups

1. Use the scroll bar to search for the Resource Group *Graves* (this could also have the name *Types of graves*; *Grave Types* or similar)

Resource Groups		Description:	
Grave Memorials		Graves	
Graves		Start Date :	01/01/1983
Late Arrival		End Date :	01/01/9999
Medical Referee Fee			
Miscellaneous Burial			

Resources		Description:	
Children's Grave		Children's Grave	
Cremated Remains Grave		Start Date :	01/01/1995
Lawn Grave		End Date :	31/12/9999
Redwood Grave			
Traditional Grave			

1. Click on the Resource Group *Graves* to select it
2. Click on the **Pointing Finger**

Edit Resource Group

ID:	2		
Description:	Grave Types		
Type of Group :	Grave		
Start Date:	01/01/1983	End Date:	01/01/9999

frmResourceGroup

The *Edit Resource Group* Screen will open

1. Check that the type of Group is *Grave*
2. Click on **Close** button

Resource Groups		Description:	
Grave Containers		Graves	
Grave Maintenance		Start Date :	01/01/1983
Grave Memorials		End Date :	01/01/9999
Graves			
Late Arrival			

Resources		Description:	
Children's Grave		Children's Grave	
Cremated Remains Grave		Start Date :	01/01/1995
Lawn Grave		End Date :	31/12/9999
Redwood Grave			
Traditional Grave			

1. Click on the **New** Resource Button

Edit Resource 1 of 1 Resource

ID:

Resource Group :

Description:

Start Date: End Date:

Grave Length:

Grave Width:

Grave Depth:

Max Coffins: *

Max Ashes: *

Grant Period :

frmResource

The *Edit Resource* Screen will open

1. Enter a description for the new type of grave
2. Enter Grave length; Grave Width and Grave Depth for this grave type
3. Enter the maximum number of coffins and the maximum sets of ashes to be interred in this grave type
4. Enter the grant period for this grave type in months (in the example below the EROB period is 50 years. If this type of grave is to be purchased in perpetuity then leave *Grant Period* blank
5. Click on **Save**
6. Click on **Close**

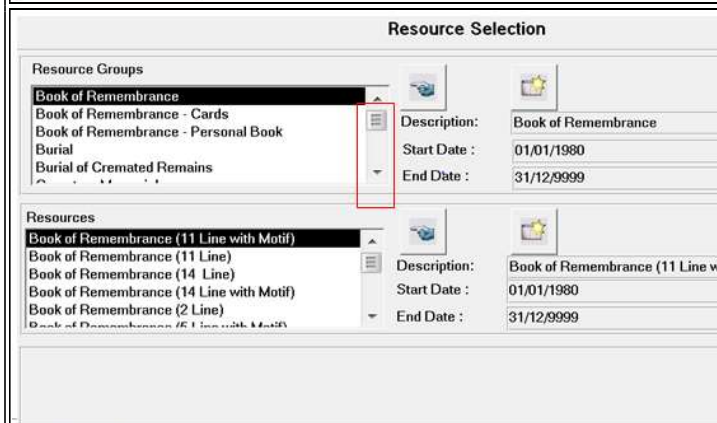
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Set up a new type of Service



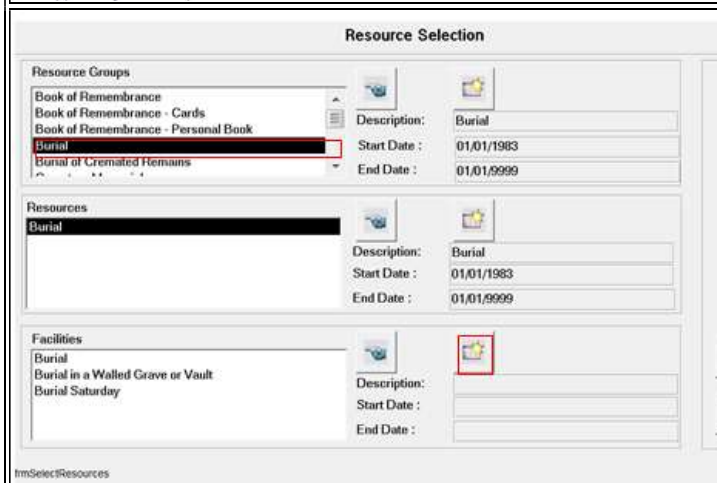
NOTE: You may wish to add a new service type to BACAS because you wish to charge a different amount from the standard service charge or because you want to differentiate between service types for reporting purposes. In the example below a Sunday Burial service is created in addition to the standard Burial Service and Saturday Burial service

1. Select **SetUp** from the *Outlook bar* on the left hand side.
2. Select **Resources** from the expanded selection.



The *Resource Selection* screen will be displayed. This will list all existing resource groups.

1. Use the Resource Group scroll bar to search for the logical resource group for your new type of service



1. Click on the Resource Group to select it
2. Click on the **New Facilities** Button

The *Edit Facility* Screen will open

1. Enter a *Description* for the new type of Service
2. Select Publishing as the *Publishing Type*
3. Click on **Save**
4. Click on **Close**

nb : If there is a charge associated with this new service type follow one of the following links to proceed:

For a new charge: [Set Up A Service Charge for Automatic Fee Generation.](#)

For an existing charge: [Link In A new Service Type to An existing Service Charge](#)




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

Set up Medical Inspectors

NOTE: BACAS will allow you to record the name and address of a member of the public who has requested to see the medical forms for a deceased. A category Resource group called Medical Inspectors will need to be set up before you can record any details:

1. Select **SetUp** from the *Outlook bar* on the left hand side.
2. Select **Resources** from the expanded selection.

Resource Selection

Resource Groups			
Book of Remembrance		Description:	Book of Remembrance
Book of Remembrance - Cards		Start Date :	01/01/1980
Book of Remembrance - Personal Book		End Date :	31/12/9999
Burial			
Burial of Cremated Remains			

Resources			
Book of Remembrance (11 Line with Motif)		Description:	Book of Remembrance (11 Line w
Book of Remembrance (11 Line)		Start Date :	01/01/1980
Book of Remembrance (14 Line)		End Date :	31/12/9999
Book of Remembrance (14 Line with Motif)			
Book of Remembrance (2 Line)			
Book of Remembrance (5 Line with Motif)			

The *Resource Selection* screen will be displayed. This will list all existing resource groups.

1. Check that a Resource Group called Medical Inspectors does not already exist.
2. Otherwise - Click on the **New** Resource Group button

Edit Resource Group

ID:

Description:

Type of Group :





Start Date: End Date:




frmResourceGroup

The *Edit Resource Group* window will be displayed.

1. Enter a Medical Inspectors as the *description*.
2. Select *Category* as the Type of Group
3. Click on **Save**
4. Click on the **Close** button

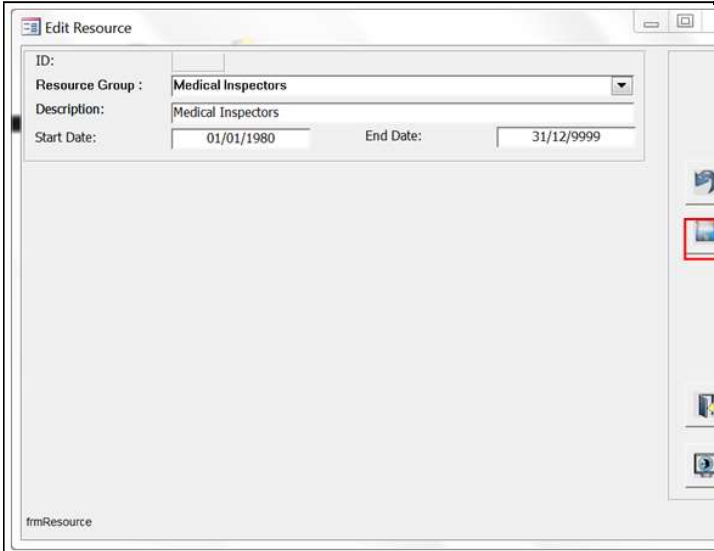
Resource Selection

Resource Groups			
General Remembrance / Memorial		Description:	Medical Inspectors
Grave Containers		Start Date :	01/01/1980
Graves		End Date :	31/12/9999
Kerb			
Medical Inspectors			

Resources			
		Description:	Book of Remembrance (11 Line w
		Start Date :	01/01/1980
		End Date :	31/12/9999

The new category will be highlighted under Resource Group

1. Click on the **New Resource** button




The *Edit Resource* Screen will open

1. Enter Medical inspectors in the *Description* field.
2. Click on **Save**
3. Click on **Close**

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Set up Medical Referee Payment



NOTE: The Medical Referee Payment will enable you to produce a report that summarises how much payment is due to each of your medical referees over a given period. A Resource group called Medical Referee Payment will need to be set up:

1. Select **SetUp** from the *Outlook bar* on the left hand side.
2. Select **Resources** from the expanded selection.

Resource Selection

Resource Groups	Description:	Start Date :	End Date :
Book of Remembrance	Book of Remembrance	01/01/1980	31/12/9999
Book of Remembrance - Cards			
Book of Remembrance - Personal Book			
Burial			
Burial of Cremated Remains			

Resources	Description:	Start Date :	End Date :
Book of Remembrance (11 Line with Motif)	Book of Remembrance (11 Line with Motif)	01/01/1980	31/12/9999
Book of Remembrance (11 Line)			
Book of Remembrance (14 Line)			
Book of Remembrance (14 Line with Motif)			
Book of Remembrance (2 Line)			
Book of Remembrance (16 Line with Motif)			

The *Resource Selection* screen will be displayed. This will list all existing resource groups.

1. Check that a Resource Group called Medical Referee Payment does not already exist. If it does it is likely that you are already set up for Medical Referee Payment
2. Otherwise : Click on the **New** Resource Group button

Edit Resource Group

ID:

Description:

Type of Group :

Start Date: End Date:

frmResourceGroup

The *Edit Resource Group* window will be displayed.

1. Enter Medical Referee Payment in the *description* field
2. Select *Medical* as the Type of Group
3. Click on **Save**
1. Click on the **Close** button

Resource Groups

Resource Groups	Description:	Start Date :	End Date :
Graves	Medical Referee Payment	01/01/1980	31/12/9999
Kerb			
Medical Inspectors			
Medical Referee Payment			
Miscellaneous Booking Fees			

Resources

Resources	Description:	Start Date :	End Date :
	Medical Referee Payment	01/01/1980	31/12/9999

The new category will be highlighted under Resource Group

1. Click on the **New Resource** button

The *Edit Resource* Screen will open

1. Enter Medical inspectors in the *Description* field.
2. Click on **Save**
3. Click on **Close**

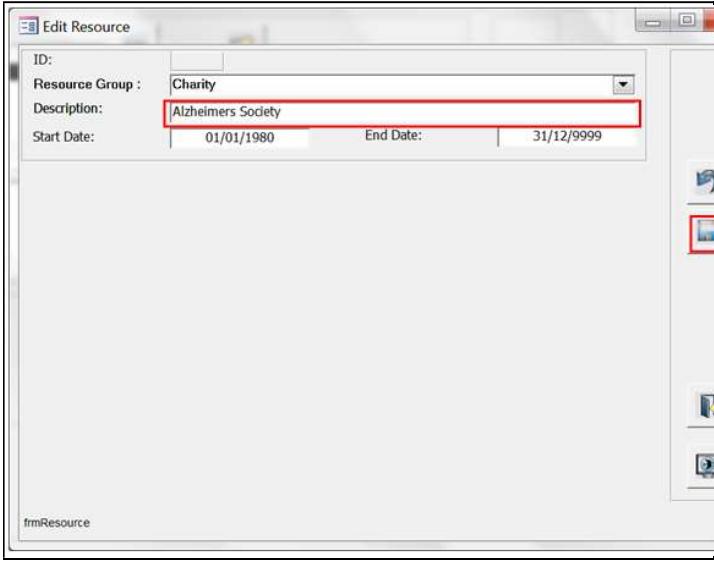
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Set Up Miscellaneous Booking Details/Notes/Information

NOTE: BACAS will allow you to set up categories to define the types of miscellaneous booking information you wish to record. For example you may wish to record the number of people expected to attend the service, or select the charity that has been chosen for donations.

1. Select **SetUp** from the *Outlook bar* on the left hand side.
2. Select **Resources** from the expanded selection.

<p style="text-align: center;">Resource Selection</p> <p>Resource Groups</p> <ul style="list-style-type: none"> Book of Remembrance Book of Remembrance - Cards Book of Remembrance - Personal Book Burial Burial of Cremated Remains <p>Resources</p> <ul style="list-style-type: none"> Book of Remembrance (11 Line with Motif) Book of Remembrance (11 Line) Book of Remembrance (14 Line) Book of Remembrance (14 Line with Motif) Book of Remembrance (2 Line) Book of Remembrance (5 Line with Motif) 	<ol style="list-style-type: none"> 1. The <i>Resource Selection</i> screen will be displayed. (This will list all existing resource groups.) 2. Click on the New Resource Group button
<p>Edit Resource Group</p> <p>ID: <input type="text"/></p> <p>Description: <input type="text" value="Charity"/></p> <p>Type of Group: <input type="text" value="Category"/></p> <p>Start Date: <input type="text" value="01/01/1980"/> End Date: <input type="text" value="31/12/9999"/></p> <p>frmResourceGroup</p>	<p>The <i>Edit Resource Group</i> window will be displayed.</p> <ol style="list-style-type: none"> 1. Enter a description for the category 2. Select <i>Category</i> as the Type of Group 3. Click on Save 4. Click on Close
<p>Resource Groups</p> <ul style="list-style-type: none"> Charity Columbarium Cremation Day Types Diaries <p>Resources</p> <ul style="list-style-type: none"> 	<p>The new category will be highlighted under Resource Group</p> <ol style="list-style-type: none"> 1. Click on the New Resource button




The *Edit Resource* Screen will open

1. Enter a value in the *Description* field. (in this case it will be the name of a Charity)
2. Click on **Save**
3. Click on **Close**

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Set up Organist Payment



NOTE: Organist Pay will enable you to produce a report that summarises how much payment is due to each of your organists over a given period. A Resource group called Organist Pay will need to be set up:

1. Select **SetUp** from the *Outlook bar* on the left hand side
2. Select **Resources** from the expanded selection.

The *Resource Selection* screen will be displayed. This will list all existing resource groups.

1. Check that a Resource Group called Organist Pay does not already exist. If it does it is likely that you are already set up for Organist Payment.
2. Otherwise : Click on the **New Resource Group** button

The *Edit Resource Group* window will be displayed.

1. Enter Organist Pay in the *description* field
2. Select *Organist (Pay)* as the Type of Group
3. Click on **Save**
4. Click on **Close**

The new group will be highlighted under Resource Group

1. Click on the **New Resource button**

The *Edit Resource* Screen will open

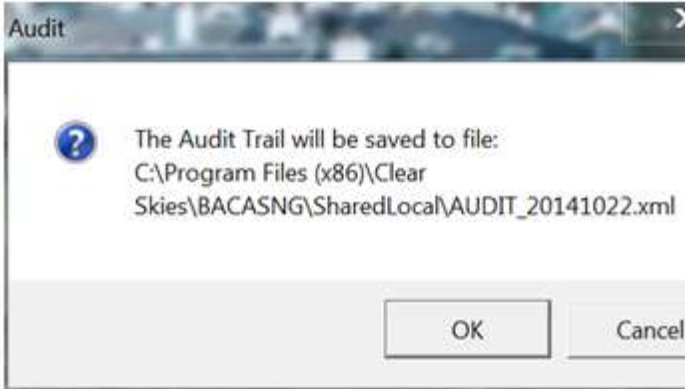
1. Enter Organist Pay in the *Description* field.
2. Click on **Save**
3. Click on **Close**

How To...

How To.....

- [Archive the Audit Trail](#)

How to Archive the Audit Trail

	<h3><u>How to Archive the Audit Trail</u></h3> <p>The Audit trail can be archived from within BACAS. Please carry out the steps below when all other users are out of BACAS. Depending upon the size of your database it may take some time, it can be left running overnight</p> <ol style="list-style-type: none">1. Select Tools from the top menu bar2. and then Archive Audit Trail from the drop down menu
	<p>A new window will open telling you the path of the file where the audit data will be saved (this will vary from the example) Click on OK</p>

