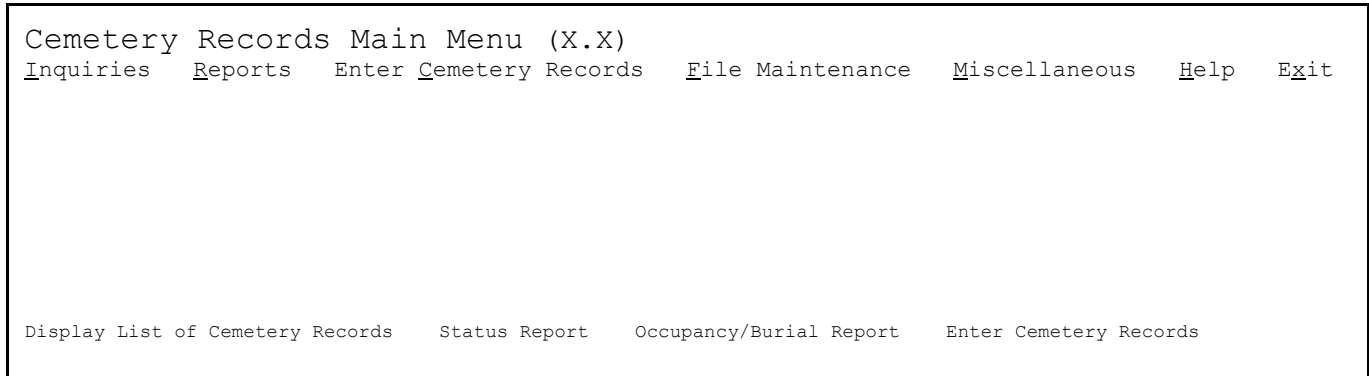


CEMETERY RECORDS SYSTEM

Last updated Feb. 2020

TO BEGIN:

1. Click on to the Cemetery icon on your Windows desktop.
2. If a password has been previously entered in the Setup file, a password screen will appear. User must type a valid password and press Enter or press Esc to exit back to the Windows desktop. Depending upon how printer info has been set up a screen will display asking user to specify which station/user is opening Cemetery. By selecting a value the program knows which printer to use as the default.
3. After the program opens the following menu will display (note: a photo (jpg file) can be displayed on the main menu by moving a file named CRSMgr.jpg into the program folder (usually CRS.win):



There are commonly used routines listed at the bottom of the screen for quick access but the following Main Menu commands allow access to all routines.

Inquiries selection provides user with a series of programs that will assist in locating cemetery data by sec/blk/lot/space, deedholder name, or occupant name. Go to Section 1.

Reports selection provides user with several programs designed to print cemetery record data to a printer. Go to Section 2.

Enter Cemetery Records selection allows user to add/edit/delete cemetery records. This is the same as option #1 under File Maintenance. Go to Section 3.

File Maintenance selection provides the user with several programs intended to maintain cemetery records or posting installment payments. Go to Section 3.

Miscellaneous provides for programs to create sequential text files for importing into a third party database or spreadsheet.

Help provides for two submenu programs that display contact info and tips/reminders on the Cemetery software.

Exit selection returns the user to the Windows desktop.

NOTE: any "jpg" format photo may be displayed on the Main Menu if the photo's name is CrsMgr.jpg. Just copy the photo into the Cemetery folder (ex: Crs.win) and rename it.

Backing up data files...

Periodically user should backup the Cemetery Record data files. If user has a tape backup then periodically a complete system backup should be done which would also backup the Cemetery records. If user has a zip disk or CD-Writer or USB drive then Cemetery files could be backed up on these devices by themselves or along with other files/folders. Cemetery files are in a folder named Crs.win or Crswin.fil.

Section 1

Inquiries

Upon selecting the Inquiries menu option the following choices display:

- 1 - Display a Single Cemetery Record
- 2 - Display a List of Cemetery Records
- 3 - All Spaces in a Single Block/Lot
- 4 - Display Installment Payment History

Option 1 will allow the user to inquire on an individual cemetery record by one of four means - sec/blk/lot/spc#, purchaser name, occupant name, or wild card name. The system will first go to the purchaser name. At the bottom of the screen operator may index the purchaser name and press **Enter** to access the closest matching name or user may select the **Lookup** command (or **F8**) to display a list beginning with the indexed name. Optionally user has the same option from the occupant name field. If looking up by space number, user would index the section# (if applicable) and press **TAB**, then block# and press **TAB**, and then lot# and press **TAB**, and then space# and press **Enter** to read record or click on "**Lookup**" command (or **F8**) to display a list starting with the values indexed. The wildcard name is a value that will be used to search thru the entire purchaser and occupant name for a match. For example if user enters "JAMES" as the wildcard name then names that would match would include "JAMES, DON", "BROWN, JAMES", and "GARY JAMES SMITH" since the word JAMES appears in all three. This is handy should names not have been entered in a consistent manner and another way is needed to find the record. Like the other name look-ups user may press **Enter** or select **Lookup** (or **F8**) after entering the wildcard name. If displaying a list user may use the mouse to click on any of the records to view the entire contents. See Space Record layout for a complete explanation of each field. Note: this screen may also be accessed by starting with Inquiry option #2 and then selecting which record is needed.

If deed images are being stored and the record displayed has a deed no., use the "Display Deed" command to view the deed image. This command is only enabled if there is a folder location defined in File Maintenance-Setup (Parameter) File. If no image displays then either folder location is incorrect or there is no image stored for this deed. The image name must be stored with the deed number and ".jpg" appended on the end. For example if the deed number is A1005 then the image must be named A1005.jpg.

If user would like to print the screen, the command "Print Screen" may be selected. When user is through looking up cemetery records, user may select the 'Exit' command to exit the program.

Option 2 will allow the operator to display a list of cemetery records to the screen based upon options and values indexed by the user.

First user determines the sequence of the display where user may select among "Sec/Blk/Lot/Spc# (2 options)", "Purchaser Name", or "Occupant Name" (the initial sequence option can be set automatically by a question in File Maintenance - Maintain Setup File). Then user selects which types of records should be included where the choices are "All Spaces", "Unoccupied Only", or "Unsold Only". Then user may index a beginning sec/blk/lot/spc#, beg/end name, or wildcard name (cursor can be positioned automatically based on a question in File Maintenance - Maintain Setup File). If the display sequence is by the first sec/blk/lot/spc# option the routine will begin with the closest record matching the beginning values indexed but will only display records with a purchaser name within the beg/end name range. If the second sec/blk/lot/spc# is selected the program displays any record where the purchaser **and** occupant name falls within the beg/end name range. If the display sequence is by purchaser name then the beg sec/blk/lot/spc values are ignored and the routine displays any records with a purchaser name within the range of beg/end names. If the

display sequence is by occupant name then the beg sec/blk/lot/spc values are ignored and the routine displays any records with an occupant name within the range of beg/end names. If user enters a "Wildcard" name the program displays records in the sequence selected but looks at the entire purchaser and/or occupant name for a match. For example if user enters "JAMES" as the wildcard name then names that would display would include "JAMES, DON", "BROWN, JAMES", and "GARY JAMES SMITH" since the word JAMES appears in all three. The displays are also influenced by what records are to be included. If "Unoccupied Only" is selected then only spaces that have "N" for the 'Occupied' field will display. If "Unsold Only" is selected then only spaces with a "U" in the 'Status' field will display. User may also influence the display by entering a beg/end purchase date or beg/end occupied date. Only records with a date within the range indexed would display. If user does not want these dates to influence the display then leave as defaulted (00/00/0000 thru current system date). User may check the "Display Comments" box to indicate that any comments stored in each record should display along with the other information. User may also check "Display Veteran Records Only" if the display should only be 'Veteran' records. A setting in "File Maintenance - Maintain Setup File" determines whether the records will be **single or double spaced** (double-spaced = 1 blank line between records) but user may check or uncheck the box "Double Space" to temporarily change the setting. Once all selections are made user should select "Begin Display" to begin the display.

If the screen fills user may use the scroll bar to across to more records. If the entire cemetery record needs to be displayed then user may double-click on the "+" at the left side of the screen (or you may click once and press Enter). If user would like to print the screen the command "Print Screen" may be selected. When user is through displaying cemetery records, user may select the 'Exit' command to exit the program.

Option 3 allows user to view all spaces for a given block/lot. This is handy when an entire lot has been purchased by one person. After choosing this option user must enter a section number (if applicable) and a block and lot number. Then the purchase information displays as well as all spaces for the block and lot. NOTE: the purchase amount that displays may or may not be the amounts from the individual spaces combined. This is determined by a question in the Setup file.

If user would like to print the screen, the command "Print Screen" may be selected. When user is through displaying cemetery records, user may select the 'Exit' command to exit the program.

Option 4 allows user to view all installment payments. These payments are created when using the "Post Installment Payment" program (option #2 under File Maintenance). First user accesses a cemetery record by entering a name and pressing Enter (or F8 for lookup) or by entering a specific sec/blk/lot/spc# and pressing Enter (or F8 for lookup). If performing the lookup user should click on the record desired. Once the record desired is found user should click on "Begin Display" to display payments.

If user would like to print the screen, the command "Print Screen" may be selected. When user is through displaying the payments, user may select the 'Exit' command to exit the program.

Section 2

Reports

Upon selecting the Reports menu option the following choices display:

- | |
|-------------------------------------|
| 1 - <u>S</u> tatus Report |
| 2 - <u>O</u> ccupancy/Burial Report |
| 3 - <u>I</u> nstallment Report |
| 4 - <u>S</u> ummary Report |

Option 1 gives the user the ability to print spaces for all status codes or a specific status code (**Sold**, **Unsold**, **Hold**). The operator may also specify the sequence the report is to print in where the choices are "Blk/Lot/Space", "Alphabetic by Purchaser", "Alphabetic by Occupant", and "Blk/Lot/Space". The second 'blk/lot/space' sequence will include both the purchaser and occupant names when entering a beg/end name below where the first one includes only the purchaser name. If the "comments" from each record should print enter "Y" for the "Print Comments on Report" question. Should you need to have additional spacing between each record on the report, enter a value 1 thru 3 for the "#Blank Lines" question. If needed, user may enter beg/end blk/lot/space numbers, beg/end names, and beg/end purchase dates. Only records that have values that fall within these ranges will be included on the report. To include all records leave the beg/end values as defaulted. The current date defaults for the report date but this may be changed. User may include only "Veteran" records on the report if the option "Include Veteran Records Only" is marked as "Yes".

The printer name for printer #1 is assumed to be the default unless a station/user name was entered upon opening Cemetery in which case the printer name associated with that user will be assumed. If user would like to "preview" the report, "Print to Screen" may be checked to display the report to the screen. When ready user may select the "Print" command to begin the report. When user is ready to exit the program, the "Exit" command may be selected.

Option 2 gives the user the ability to print a list of records based upon the occupancy status of the cemetery record. If the option "Occupied Spaces Only" is selected, the operator may index a beginning and ending date to generate a "Burial" list for a date range. User may specify the print sequence where the choices are "**Sec/Blk/Lot/Space#**", "**Occupant Name**", and "**Date/Occupant Name**". The print sequence "**Date/Occupant Name**" is only applicable if selecting the "Occupied Spaces Only" option.

If the "**Comments**" from the record should print enter "Y" on the "Print Comments on Report" question. Should you need to have additional spacing between each record on the report, enter a value 1 thru 3 for the "#Blank Lines" question. If needed, user may enter a beg/end blk/lot/space numbers and beg/end occupant names. The current date defaults for the report date but this may be changed.

The printer name for printer #1 is assumed to be the default unless a station/user name was entered upon opening Cemetery in which case the printer name associated with that user will be assumed. If user would like to "preview" the report, "Print to Screen" may be checked to display the report to the screen. When ready user may select the "Print" command to begin the report. When user is ready to exit the program, the "Exit" command may be selected.

Option 3 gives the user the ability to print a list of installment records. If either of the options "List of Past Due Installments" or "List of Installment Payments" are chosen, then the system will allow user to enter a beginning and ending date. For "List of Past Due Installments" load a beginning date such that any "last payment date" dated before the beginning date would be considered past due. The ending date for this option is usually the last date of the month. For "List of Installment Payments" index a beginning and ending date for which you would like to have payments listed. The print sequence and beginning and ending values may be specified. Should you need to have additional spacing between each record on the report, enter a value 1 thru 3 for the "#Blank Lines" question. The current date defaults for the report date but this may be changed.

The printer name for printer #1 is assumed to be the default unless a station/user name was entered upon opening Cemetery in which case the printer name associated with that user will be assumed. When ready user may select the "Print" command to begin the report. When user is ready to exit the program, the "Exit" command may be selected.

Option 4 allows user to print "summary" cemetery info such the number of spaces and how many are sold, unsold, etc. Should the report need only include part of your cemetery, user may enter beg/end sec/blk/lot/space numbers and beg/end names. If entering a beg/name, user should also select which name should be tested against... purchaser name, occupant name, or both. User may also enter beg/end purchase dates and beg/end occupied dates. Leaving beg/end values as defaulted will include all records. The current date defaults for the report date but this may be changed.

The printer name for printer #1 is assumed to be the default unless a station/user name was entered upon opening Cemetery in which case the printer name associated with that user will be assumed. If user would like to "preview" the report, "Print to Screen" may be checked to display the report to the screen. When ready user may select the "Print" command to begin the report. When user is ready to exit the program, the "Exit" command may be selected.

Section 3

File Maintenance

Upon selecting the File Maintenance menu option the following choices display:

- 1 - Maintain Cemetery Records File
- 2 - Post Installment Payments
- 3 - Renumber a Single Cemetery Record
- 4 - Renumber Cemetery Records Automatically
- 5 - Maintain Setup (Parameter) File

Option 1 is used to add, edit, or delete a new cemetery space record.

Add... a record may be added by selecting the 'Add' option or pressing F1. (See space record discussion on page 9 for explanation of each field). A record must contain a unique sec/blk/lot/space no. Note these are separate fields and TAB or Enter keys are used to move from field to field. (Depending upon how the Setup file is set up, the section number may be skipped). If any field is not applicable user may depress TAB or Enter to bypass. The sec/blk/lot/space is the only required data for a cemetery space and **must be unique** for this record. If the value entered is not unique the user will not be allowed to enter the record contents. Once a unique sec/lot/blk/space number is entered, user should depress TAB or Enter key to go from field to field. If user wants to start the add completely over, the "Cancel" command may be selected. When screen is filled out correctly user should depress "Save" command (F10 key moves to this command). If adding several records containing the same section, lot, and block numbers as well as the same purchaser name, user may depress the F4 key from the section or block number (after adding the first record). Then user enters the space number and any other data. Note: whether the purchase amount repeats is determined by a question in the Parameter file.

Edit... if a record needs to be edited, user must first display the record to the screen. To do this operator may index the purchaser name (at the bottom of the screen) and press **Enter** to access the closest matching name or user may select the **Lookup** command (or press **F8**) to display a list beginning with the indexed name. Optionally the user has the same option from the occupant name field. If looking up by space number, user would index the section# (if applicable) and press TAB, then block# and press TAB, and then lot# and press TAB, and then space# and press **Enter** to read record or select the **Lookup** command (or **F8**) to display a list of records starting with the values indexed. The wildcard name is a value that can be used to search thru the entire purchaser and occupant name for a match. For example if user enters "JAMES" as the wildcard name then names that would match would include "JAMES, DON", "BROWN, JAMES", and "GARY JAMES SMITH" since the word JAMES appears in all three. This is handy should names not have been entered in a consistent manner and another way is needed to find the record. Like the other name look-ups user may (after entering the wildcard name) press **Enter** or select the **Lookup** command for a list. If displaying a list user may use the mouse to select any of the records to view the entire contents. Once the desired record is displayed user may select the "Edit" option or F2 to begin editing. User may move to the field to be edited by pressing the TAB key or user may use the mouse to point and click. To save the edited record user selects "Save" (F10 moves to "Save") or "Cancel" may be selected to cancel the edit.

Delete.. if a record needs to be deleted, user must first display the record to the screen. To do this user may use any of the search options available under "Edit" above. If performing a lookup user may use the mouse to select any of the records to view the entire contents. Once the desired record is displayed user may select the "Delete" option or F3. A warning screen then displays allowing user to select "OK" to confirm the delete or "Cancel" or void the delete.

Display Deed.. If deed images are being stored and the record displayed has a deed no., use this command to view the deed image. This command is only enabled if there is a folder location defined in File Maintenance-Setup (Parameter) File. If no image displays then either folder location is incorrect or there is no image stored for this deed. The image name must be stored with the deed number and ".jpg" appended on the end. For example if the deed number is A1005 then the image must be named A1005.jpg.

Exit... after all maintenance is done user may select the "Exit" command to exit the program.

Option 2 allows the operator to post installment payments. This will have the effect of updating the installment fields on the cemetery record and creating a payment history record. First user accesses a cemetery record by entering a name and pressing ENTER (or F8 for lookup) or by entering a specific sec/blk/lot/spc# and pressing ENTER (or F8 for lookup). If performing the lookup user should click on the record desired. Then user selects the "Post" command (note: if the record has a zero or credit balance a warning will display). The operator then indexes the posting date, reference, and payment amount (minus amount would add to the balance). If the entries are correct user selects the "Update" command. To cancel the entries user selects the "Cancel" command.

Exit... after all postings are done user may select the "Exit" command to exit the program.

Option 3 allows user to renumber a cemetery record. This is handy since the sec/blk/lot/space# can not be edited under normal maintenance. Therefore if you need to change the numbers assigned to a space this program will need to be used.

First user indexes the old sec/blk/lot/space number. After successfully entering the values the purchaser name and purchase date should display so you know that the correct space has been accessed. Second indexes user indexes the new number (the new number must be a non-existing number).

Once user is satisfied that both sets of values are on the screen correctly, user should select the "Begin Renumber" command. When user is finished renumbering, the "Exit" command should be selected to exit from the program.

Option 4 allows user to re-number spaces automatically by enlarging the block, lot, or space numbers. For example if the block numbers were previously inputted as two digit numbers (06) and now needs to be three digit numbers (006) this routine can perform the re-number automatically. After selecting this routine the user may then enter "Y" next to which items should be enlarged. If "Y" is entered then the user must enter how many digits to be enlarged to.

Once user is satisfied that the entries are correct, user should select the "Begin Renumber" command. When user is finished renumbering, the "Exit" command should be selected to exit from the program. (Note: be sure and go into Setup File and change the number of digits for new records to be inputted).

Option 5 allows user to enter values for the Setup file. The Setup file contains static - one time data that is used by other programs. User should enter data asked for using Tab key to go from field to field (see Setup File discussion on page 10 for detail explanation). Select "Save and Exit" (F10 key moves to "Save") to save the screen contents and exit. "Cancel" exits the program without saving. Before exiting, user may also select "Print Screen" to print the screen to paper to have a record of how questions were answered.

Section 4

Miscellaneous

Create Cemetery 'csv' File

This program gives the user the ability of creating a file in "csv" format with cemetery record info. The created file can then be imported into a spreadsheet or database program.

User can enter a file name or just use the default file name of "Cemetery.csv" (make sure any file name entered ends in ".csv"). User may also select the sequence the records will be written into the file with "Sec/Blk/Lot/Space#" and "Purchaser Name" being the two choices. If needed user can enter a range of Sec/Blk/Lot/Space#s.

When all selections have been made user should select "Begin" to start. The file created will be in the same folder as the Cemetery software and data files (usually CRS.win). When ready to leave the program select "X" or "Exit".

SPACE RECORD

Sec/Block/Lot/Spc#: ___/___/___/___
Status: _ S=sold U=unsold H=hold

Purchase Info:

Purchaser Name: _____
Deed No.: _____
Purchase Amt: _____
Purchase Date: _____ MMDDYYYY

Installment Info:

Scheduled Payment: _____
Balance Due: _____
Amount of Last Payment: _____
Date of Last Payment: _____

Occupant Info:

Occupied: ___ Y/N
Occupied Name: _____
Date Occupied: _____
Maintenance Fee: _____
Marker Type: ___ S/D
Veteran: ___ Y/N
Birthdate: _____

Comments:

Section/Block/Lot/Space - make sure the Setup file has been set up properly. User may specify that the section# is not being used. It's important also that the correct number of digits for the block, lot, and space numbers be defined.

- Status** - enter 'S' if space is sold, 'U' if space is unsold or 'H' if it is on hold.
- Purchaser Name** - name of person who has purchased space or has it on hold. Enter last name name first if using name look-up.
- Deed Number** - the number on the deed to this space. If deed images are being stored to view later, the image name should be this number with ".jpg" appended on the end.
- Date of Purchase** - date this space was sold or put on hold. Enter as MMDDYYYY with no slashes although zero dates and dates with only the year are allowed (ex: 00/00/1962).
- Scheduled Payment** - the installment amount being paid on this space.
- Balance Due** - the balance owed on this space.
- Amount Last Payt** - the amount of the last payment received.
- Date of Last Payt** - the date of the last payment received.

- Occupied** - enter 'Y' if someone is buried in the space or 'N' if not.
- Occupant Name** - name of person buried in this space. Enter last name first if using name look-up. Entering the letter 'S' only will repeat the purchaser's name as the occupant's name.
- Date Occupied** - date of burial. Enter as MMDDYYYY with no slashes although zero dates and dates with only the year are allowed (ex: 00/00/1945)
- Maintenance Fee** - the amount of any fees collected for the upkeep of this space.
- Marker Type** - this defines whether the cemetery marker was "D"onated or "S"old. Otherwise leave blank.
- Veteran** - enter "Y" if the occupant is a veteran. Enter "N" or leave blank if No or if not known.
- Birth Date** - enter the occupant's date of birth if known.

Comments(4 lines) - anything else user wants to store about this space may be typed here.

- Rd-Only Password - same as the Full password except users entering the program with this password will be allowed to perform only print and view functions - no changes may be done.
- Printers (1-3) - the printer names to used in Cemetery. The format of the printer name should be "Prtname:" followed by the name of the printer as defined in Printer Properties in Control Panel (ex: "Prtname:HP Laserjet 1200").
- Station/User Desc (1-3) - if Cemetery will commonly be used at multiple PCs with different printers, you should enter a station or user name for each of the printers you entered above. For example descriptions like "Front Counter" or "Betty's PC" could be entered. Then when opening the program the user will select the station/user name so the program will know which printer to default to. **Leave these names blank if only one printer will be used in the Cemetery program.**
- Folder Location of Deed Images** - the Cemetery software allows for the viewing of deeds if they are scanned and stored in "jpg" format. If these images are being stored then it is recommended that the images be stored in a separate folder. This field is then needed to tell the program the folder location of the images. For example if the location entered is `\CRS.win\CRS.deeds\` then it means the images are stored in a folder named CRS.deeds which is a sub-folder under CRS.win.

KEYBOARD USAGE

The mouse can be the primary device for navigating around screens. However most functions can also be done by using the keyboard as described below:

When adding/editing a a new record the **Tab** key is used to move from field to field although the Enter key may also be used.

In File Maintenance programs user may press **F1, F2, or F3** keys to select Add, Edit, or Delete functions. **F8** key can be used to perform a Lookup.

To move back to the previous field use **Shift-Tab**.

To choose between **Option** buttons use **Left and Right Arrows**. NOTE: Option buttons are two or more choices in a rectangular box where only one selection can be made. (ex: the Print Sequence options in the Cemetery Reports are Option buttons).

If a **Command** box is surrounded by dots, pressing the **Enter** key will execute it. Ex: the "Save" and "Cancel" fields on File Maintenance screens are Command boxes.

The choices from the drop-down menus (from Main Menu) can be displayed by pressing the Alt key and the letter underlined. Then the program may be accessed by pressing **Up and Down Arrows**. Then **Enter** may be pressed to select. If any of the selections from the drop-down menus have a letter underlined, pressing this letter will select the program.