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The Control Console Step-by-Step Guide

Please contact customer service if you have questions regarding your existing account or if you need instructions on how to use your account's features.

Customer Service:
service@atpeace.info
623.242.2341

Please contact tech support if an Infopage, Search Page or Approval Page is displaying incorrectly.

Technical Support :
technical@atpeace.info
404.418.6622

For all other comments or questions please contact:

General Inquiries:
info@atpeace.info
877-49PEACE

ver.1.1



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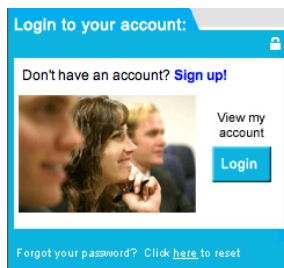
QUICK TIPS

We may refer to various terms you may be unfamiliar with, so be sure to look them up in our glossary terms on the last page of this guide.

Always enter all phone numbers in this format: 3105551213 the software will format the numbers for you.

Log In

Begin by going to www.atpeace.info and logging in using the username and password provided to you by Sales or Customer Service. Log in through the blue Login box on our website. Once logged in, you're in the area we call the "Control Console".



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Example Funeral Home - You are currently logged in | [logout](#)

[View Client List](#) [Add New Client](#) [My Account](#) [Purchase Additional Kits](#) [HOME SITE](#) 39 Kits Remaining

Job #	Deceased	Family Contact	Relation	Phone	Service	Type	Pkg	InfoPage	Status
JO Test	Paula Crampton	Daniel Ester		(404) 555-6633	Nov 30, 1999 12:00 AM	Funeral/Viewing/Interment		edit preview	active

Look Around

You'll always open to your View Client List [if this is your first visit, there isn't anything listed] Before we add anything though, take a look at this window. There is a lot of information in the upper right hand corner. First, your Funeral Home name is listed for those of you with more than one location. The HOME SITE Link is where your subdomain is located. You'll send people there to help find the Infopage they may be looking for. Your HOME SITE has a search engine built in and lists the most recent upcoming services. You will notice that your Kits Remaining are also displayed here - when you run low, simply click on the "Purchase Additional Kits" and you are directly transferred to the ECommerce site already signed in and ready for the purchase. It is a good idea to logout by clicking on the link after each session.

GLOBAL SOFTWARE TIPS

- In any Subsection, **always** click the Plus Sign before adding information.
- Need help with a specific area? Click the help bubble  where available.

SET UP

My Account

Click on My Account. You begin this section in the My Vendors section.

My Vendors

Click on the Plus sign then fill out Vendor information in the fields on the right. Enter vendors that you may use on a daily basis such as printers, florists, local bed and breakfasts, freelance assistants, etc. This area will be used more in future versions, but for now it acts as an additional feature for you to keep track of some of your contacts. Click Update

[My Vendors](#)
[My Locations](#)
[Manage Users](#)

My Vendors [click Name for details](#)

Vendor Name	Type
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Updating and Deleting Any Entry

In regards to any of the entries in the Control Console, you can easily update by clicking on the selection in the list, then select the proper tab and make your edits in the fields.

Remember to Click Update.

To Delete a selection in Vendor, Location or Users, click the selection in the list, then go to the bottom of the form and click Delete.

GLOSSARY

Control Console:

Funeral Home's Admin/Control Panel - what this Quick Guide covers.

InfoPage:

The final online web page for use by the Family to provide information to others. Links are emailed out from their Approval Page. It also may be shared via email by Infopage visitors.

Approval Page:

The initial InfoPage generated using the Control Console by the Funeral Home that is sent to the Family for review and approval.

Infopage Approval Contact:

The point of contact for the family responsible for approving the Infopage.

Family Contact:

Not to be confused with the Infopage Approval Contact, this is the person that the Family has entrusted to field questions about the services and other related information.

Funeral Home Search Page:

The subdomain for the Funeral Home where the general public can search for an Infopage.

Kit:

A set of supplies, instructional matter, and the InfoPage itself, that is provided to the Funeral Home from At Peace. Purchased by the "Bundle" on our Ecommerce website.

The Control Console Step-by-Step Guide:

Our step-by-step User Guide that is included in the Kit. (You're looking at it)

Family Questionnaire Form:

The form that the Funeral Director fills out when asking the Family questions.

Quick Guide:

A small handout given to the Infopage Approval Contact to assist the Infopage Approval Contact with the Approval Process.

THE THREE MOST FREQUENTLY ASKED QUESTIONS:

Does this software work on all Platforms?

While an Infopage may be viewed on any computer or browser, at the time of this writing our Software works best on a PC using Internet Explorer or Firefox as your browser. We are working on Macintosh compatibility. Check www.atpeace.info/macupdate for updated news.

Why Can't I add Vendors or Locations?

Remember to first click on the White Plus Sign "+" on the left side of the listing header prior to entering your information. Remember to click Update at the bottom of the tab window.

Why won't my Photo upload?

Make sure the image is in jpeg format. A gif, pict, pdf, bmp or png will not work.

Please call or email Customer Support with any other questions!

If you select: Flowers accepted:

Pull from the drop down list the Location you wish to be displayed on the Infopage [these are only available if you entered locations under "My Locations" previously] You may also type in a new Location in the field provided.

If the family plans on donating the flowers, click the option and enter the Organization to which they'll be donated.

If Memorial Donations are Accepted, than enter the Name and address and/or method of delivery in the field under "Are Memorial Donations Accepted?". If they are not accepted, then click No.

Click Update

Additional Useful Links:

You may wish to leave the "Additional Useful Links" for the Infopage Approval Contact to fill out. If the Family wishes to include some while at your initial meeting, enter the complete URL in the first field (including http://) and then a description next to it. Keep in mind that the description will be the link itself, so you may want to include the words "click here" i.e. For Directions to Aunt Beale's house click here" or "Click here for the Nora BealeFoundation" Click Update

Approval Email:

Don't forget this vital step! Click the button "send approval email" – an email is then sent to the email address listed under Infopage Approval Contact. This email requests approval of the Infopage. The Status will appear as "pending-app" meaning Pending Approval. Once approved by the Infopage Approval Contact, it will show up as "active" in the Client List.

IMPORTANT TIP

You should never alter any Infopage after the initial approval by the Infopage Approval Contact. All editing should be made by, or under the direct supervision of the Infopage Approval Contact. The Funeral Home may be open to liability if these principles are not adhered to. If the Infopage Approval Contact requests that you edit the Infopage, be sure go through the approval process again as described below.

Editing or Disabling an Infopage after Approval

Simply click on *View Client List* – Find the Infopage entry in the list and click "edit".

Use the very first dropdown menu the select "inactive". You may activate it again using this same method to select "active". If you edit for the Infopage Approval Contact, you should go through the approval process again, select "inactive". **First click Update and then click "send approval email", this will automatically change the status to "pending".**

Sorting and Using the Client List View

Notice that any underlined headings allow you to sort. You may sort by Job#, Deceased Name, Family Contact, Service, Service Type and Status. This is useful to immediately find a specific entry by any of those methods. Use the Client List View to keep track of your Clients. Infopages go into inactive status automatically after four weeks. You can make them active for longer periods at the Family's request.

Ordering Additional Kits

From within the Contol Console, click on "Purchase Additional Kits", this will bring you directly to our Ecommerce site, already logged in, ready for purchase. If it fails to recognize your account, enter your username and password for your account. **Do Not Start A New Account!** Call Customer Service or click "Password forgotten? Click here." to have it emailed to you.

My Locations

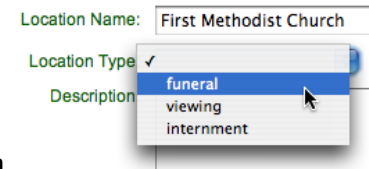
Your locations are anywhere your services may take place i.e. – Your physical addresses, churches, gravesites, viewing halls, memorial gardens, etc. Include all the places that people may need directions to.

Click on the Plus Sign (+).

Enter your first location. Selecting the "Location Type" categorizes the locations into either Viewing, Funeral or Interment. Be sure to accurately select the "Location Type" as it will be important when creating an Infopage, so that the Location Dropdown Menus reflect the proper group of Locations.

Click Update – then Click the Plus Sign (+) and enter the next location. Repeat. etc.

→ New Location



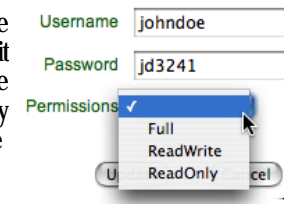
Now that the recurring information is written to the system, you'll be able to create an Infopage in about 5 minutes.

Adding Users

This step isn't absolutely necessary, unless you need an employee to have access to check on the Clients without being able to edit them. Or if you'll have a lot of users, and you want them to have their own log-ins. We do suggest using this feature, as there may be upcoming features in future version updates that may utilize the User log-ins differently.

Click the Plus Sign (+).

Fill out the form and be sure to indicate the proper Permission. Click Update



ADDING CLIENTS (Creating The InfoPage)

Click on "Add New Client"

Status:

This field will automatically adjust when the Infopage Approval Contact has approved the Infopage. There is no need to change this – unless after the page has been approved, the Infopage Approval Contact asks you to change the Status to inactive.

System/Job number:

You can use this in a variety of ways. First in order to sort, we suggest to give each user a two digit code (their initials for instance) so that each individual will be able to sort their own entries easily. After that, if you use internal job numbers, this would be a great place to put it. Your entry may look something like this: JO-2553784

Package:

Select "Standard" - right now that's the only choice, but in future versions we anticipate adding other package types with optional features such as sending text messages.

Deceased:

Select the title from the dropdown menu, first and last name, then choose your image file for upload [if you haven't scanned it in yet, you can do that now, leaving your window open, or add it after you've created the page. Also, the family can upload the image from their home computer. Make sure this is in jpeg format - click on the help bubble for assistance.

Service Type:

Select from the drop down menus the Service type and Faith.
Click Update

Infopage Approval Contact:

Fill out the InfoPage Approval contact fields.
(This is the person whom the Family of the deceased has chosen to approve the Infopage.)
The Username and Password may auto-populate, but you may change those to your own system of nomenclature if you wish.
Click Update

NOTE: If you choose to create your own usernames and passwords, be sure to NEVER create the same username and password for any two clients, as the system will then by default send the second user to the Infopage that was created prior.

Service Dates and Times:

You'll need to pay close attention to the entering of this information. This area is very flexible. The Infopage Approval Contact will ultimately be responsible for the Approval, but they will not be able to edit this area, they'll have to call you to edit it.

Service Dates & Times: Check all that apply:

Viewing Info:

option 1st Viewing Date: Time: From to Location:

option 2nd Date and Time: From to

Funeral Info:

option Date: Time: Location:

Interment Info:

option Date: Time: Location:

Click on the checkboxes for all of the options that are applicable first.

Viewing Info:

If there are no viewing services then don't click any.
If there is one viewing service then click the 1st Viewing date checkbox
If there are two viewing services then click both Viewing date checkboxes

Funeral Info:

Click this option if there is a funeral ceremony apart from the graveside ceremony.
If it's a graveside only ceremony then leave this option unchecked and only check the Interment checkbox.

Interment Info:

If there is a graveside ceremony then click the checkbox.

Next, click on the Calendar Icons to set the dates, and the drop menus for the times of the services you've chosen, then lastly, the locations. Locations should match the proper types.

NOTE: If they don't seem to match up, go back to the "Locations" Section and edit them appropriately. You can always come back to the Infopage you were working on.

Click Update

Family Information:

The Survived by section is optional. Put any information you like here. You may view examples and suggestions by clicking on the help bubble. The Infopage Approval Contact may wish enter this to appear as the Obituary does, so you may leave it for them to fill out.

Family Contact

This is one of the most important features of the Infopage. Enter the name of the person as it should appear on the Infopage. The Family Contact will assist the Family by taking calls on all details about the services. The Infopage Approval Contact may edit this later.

Other Important Info

This area is usually completed by the Infopage Approval Contact and has been included for miscellaneous inclusions regarding unique family arrangements. Some good examples are: "A Friends and Family Hotel discount has been arranged for at the Hilton Hotel on 5th Street for those staying overnight" and/or "Aunt Beale has arranged for a PotLuck dinner for anyone wishing to visit following the Interment Service"
Click Update

InfoPage Information:

Template Type:

Choose the template that the family decided upon from the dropdown menu.

Enter or select a generic brief thank you from the family. We've provided a few for you - by clicking on any Version 1-4 the text will autopopulate the field. Be sure to read and edit accordingly (changing "He" to "She" if necessary, etc.)

Click Update

InfoPage Information:

Template Type:

Formal
 Classy
 Cornflower
 Old Glory
 Mod
 Tuxedo
 Lavender
 Paisley
 Spring
 Ichiban
 Sable
 Parlor

from Family:

Version 2 Version 3 Version 4

Update Cancel

Flowers and Memorial Donations:

Choose the Selection that best applies.

Notice that the options associated will change depending on what is selected.

If you select: Decline All:

"No, a Memorial donation is not accepted." should appear preselected under "Are Memorial Donations Accepted?".

Click Update

If you select: Decline flowers & make donations to Memorial instead:

Then under "Are Memorial Donations Accepted?" click "Yes, add memorial donation information." and enter the information you wish to be displayed on the Infopage.

Click Update