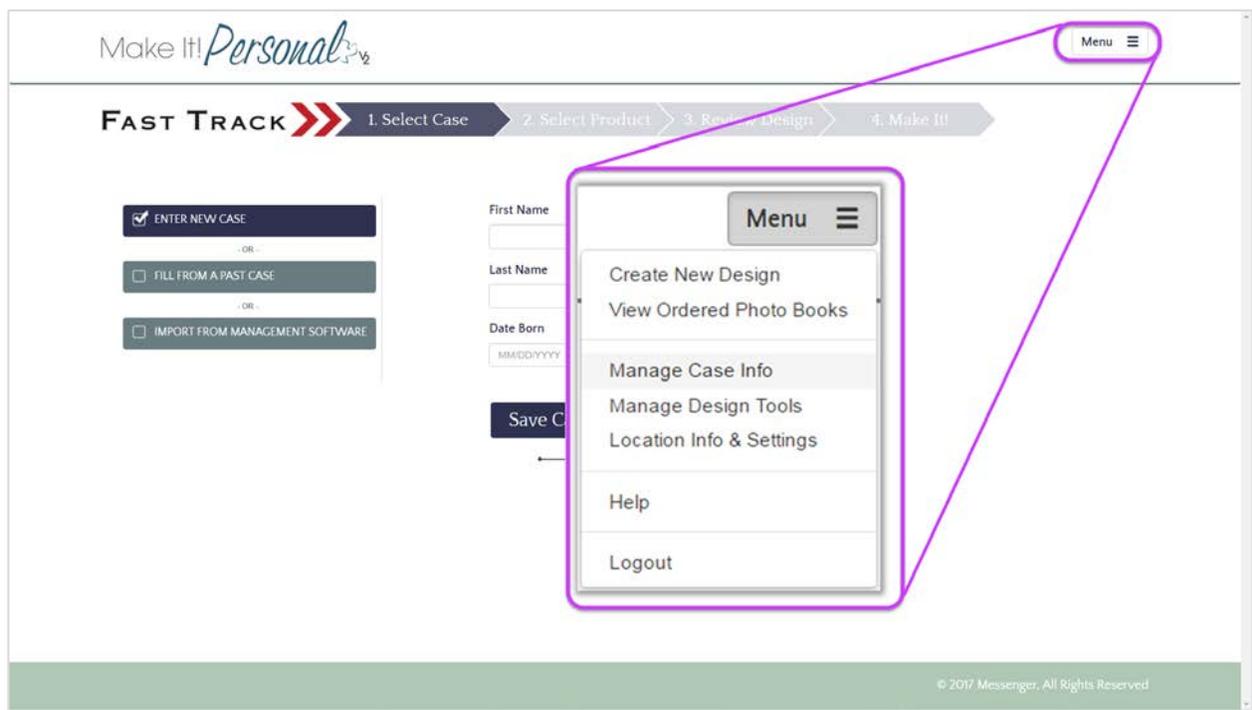


Managing Case Information

In Make It Personal all the information for a given decedent is referred to as a **Case Profile**. Think of this as a mini database from which you can have the information populate any design you wish to customize. This eliminates the need to re-enter the same data over again for each separate design you customize for the same case.

You can maintain your list of cases or manage the data within them from anywhere in the program by clicking the **Menu** button in the upper right of the screen, and choosing **Manage Case Info**.



The Manage Case Info Screen

Make It! Personal ^{v2} Menu

Manage Case Information

Search or select a case below to view details, modify, or remove the case.

Search (1) First Name, Last Name, or Case ID

Location (2) All

Show Only (status) (3) Active Only

Add a New Case (4)

Last Name	First Name	Date Deceased	Last Modified	Status	Edit
Whoknows	Linus	4/01/2017	4/03/2017	Active	
Olsen	Nelle	2/02/1910	3/30/2017	Active	
Stark	George	8/02/2016	3/30/2017	Active	
Deschain	Roland	2/17/2016	3/13/2017	Active	
Stark	Ted	9/18/2015	1/11/2017	Active	
Stephens	Benjamin	11/13/2016	11/14/2016	Active	
Dobbs	Bob	11/30/2015	8/29/2016	Active	
Bolton	Ramsay	7/13/2016	7/14/2016	Active	
Squire	Chris	6/27/2015	6/15/2016	Active	

© 2017 Messenger, All Rights Reserved

1. Search filter - filters list by first/last name, or case ID number
2. Location filter - filters list to show only cases associated with one specific Funeral Home location
3. Status- Active/Inactive filter - filters list to show only Active cases, only Inactive cases, or all cases
4. Add a New Case button - opens a new Case Profile for editing
5. Case list - can be sorted ascending/descending by any of the column headings

To open a case for editing, click on the pencil icon



or double click anywhere on the row of the case you wish to edit.

Editing the Case Profile

Basic tab

Several fields require some information entered to save a Case Profile. (highlighted in yellow below)

- You must choose a location to associate with this case
- First Name
- Last Name
- Date Born
- Date Deceased

Adding the Case Profile of: Active Location

BASIC | ADVANCED | CASE IMAGES (0) | CASE DESIGNS

BASIC INFO

Age: N/A | Case ID:

Title:

First Name:

Middle Name:

Last Name:

Suffix:

Nickname:

Gender:

Place of Birth:

Date Born:

Place of Death:

Date Deceased:

Obituary:

CANCEL | SAVE AND CLOSE | SAVE CASE

The **Active** checkbox toggles the case between Active and Inactive status, for the purposes of filtering your list of cases under *Manage Case Info*.

The **Case ID** field is an optional field you can incorporate as needed, remember you can filter the list of cases in the *Manage Case Info* screen by Case ID.

Advanced tab

The Advanced tab contains the following sections:

Family Members

Adding Additional Family Members:

To add additional family members, type or paste their name into the **Name** field, and choose a **Type** to specify the relation. Choose **Other** as the type to input a custom relationship description, or to not specify a relationship. Please note the name field is intended for one name per field.

Reordering the sequence of the Additional Family Members:

Most templates are built with the Additional Family Members fields placed on the panel in sequence, so that they will populate in the same order as the list of Additional Family Members in Manage Case Info. Changing the order is done by reordering the list in the Case Profile, rather than moving around the fields on the design.

Simply select the family member you wish to reorder, and move them up or down in the sequence as desired using the arrow buttons at the right of the list:

ADDITIONAL FAMILY MEMBERS

NAME	TYPE		
number one	Spouse		
number two	Son		
number three	Other		

Name Type Relation

ADDITIONAL FAMILY MEMBERS

NAME	TYPE		
number three	Other		
number one	Spouse		
number two	Son		

Name Type Relation

Genealogy

Add the information for the decedent's grandparents and/or great-grandparents here. Click on the caret next to grandfather/grandmother to reveal great-grandparent input fields.

Service Info

Add information regarding the funeral service here. We've recently eliminated the Catholic Service Information section, moving the Mass Information and Catholic Service Participants subsections under the consolidated *Service Info* section.

Visitations - You can now add multiple visitations, however many standard templates will not include these fields by default, and you will need to add them to your panel(s).

Service Participants - All the Service Participant types have been combined under one dropdown with the following participant types: Celebrant, Clergy, Honorary Pallbearer, Organist, Vocalist, and Other. Choose **Other** for a custom participant descriptor or no participant descriptor.

Final Resting Place

Add information regarding the final resting place location and disposition here.

Military Service Info

Add information regarding the decedent's military service here.

****Expression Guests**

****FloralXpress Flowers**

(** only appears on Expression/FloralXpress enabled accounts)

Expression Guest Registry and FloralXpress maintain their own database of cases/services, therefore you will need to add, or link MIP cases to sync to the EGR/FX dashboard.

ADD to Expression - will create a new Service for this case in the EGR/FX dashboard

LINK to Expression - will allow you to select an existing case in the EGR/FX dashboard to sync to the MIP case

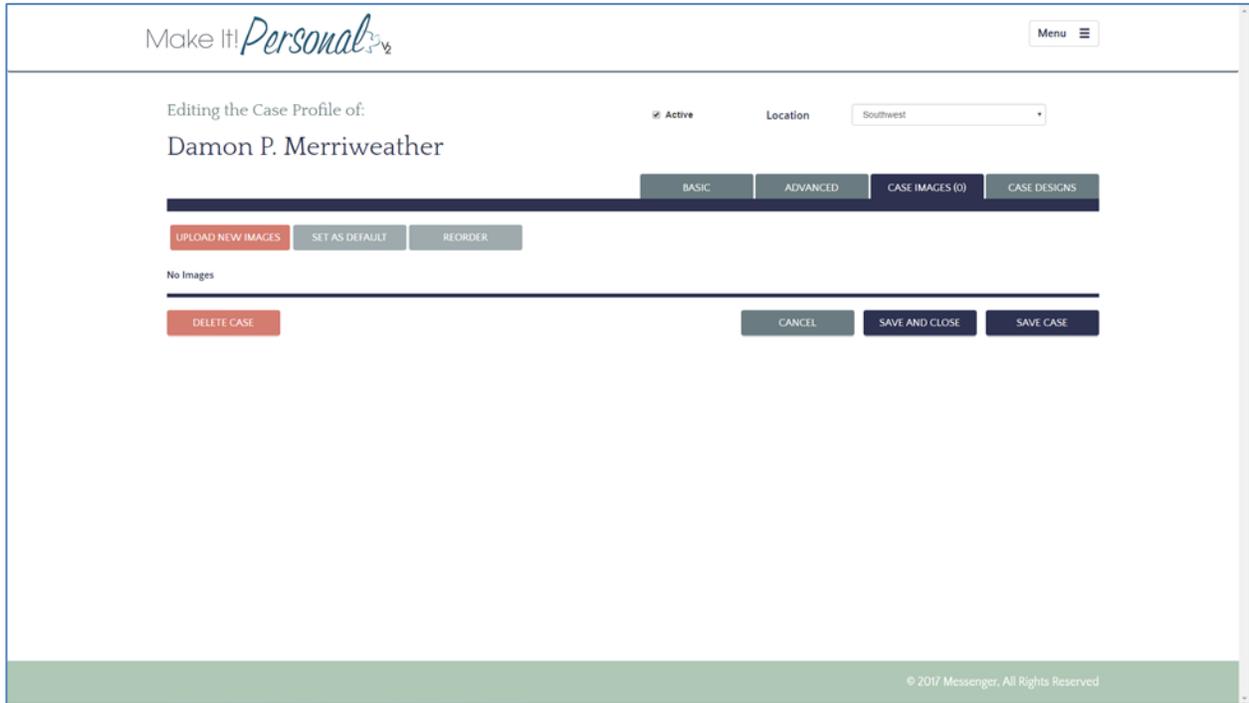
For more information on Expression Guest Registry and/or FloralXpress, click [here](#).

For technical reference and support for EGR/FX, click [here](#).

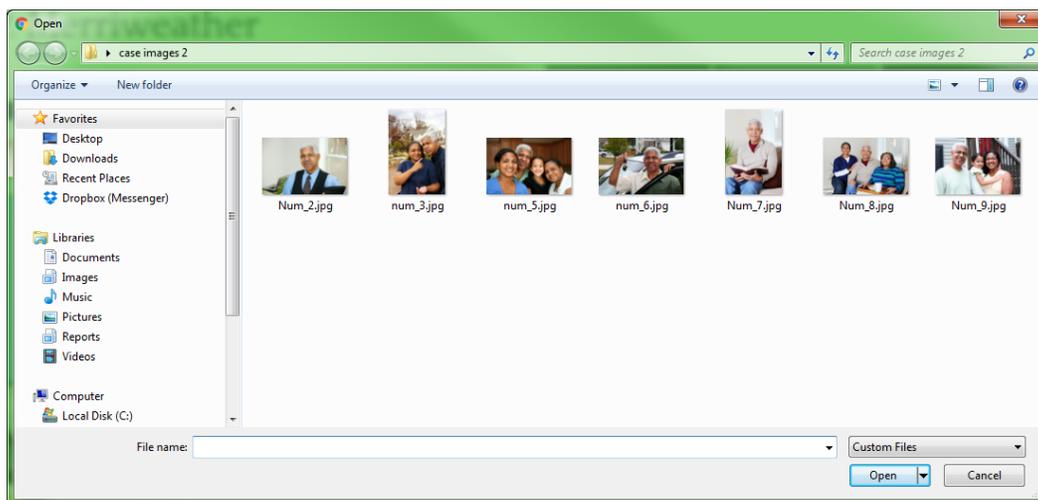
Custom Fields

You can name up to 10 fields with custom descriptors in [Location Info & Settings](#). In this section you can input the actual case specific data for these custom defined fields.

Case Images tab



The *Case Images* tab is where you will upload all the photos you would include in any of your stationery designs. Simply click the button labeled **Upload New Images** to browse for image files. Image files need to be in **.jpg** or **.png** format. You may upload one image at a time, or multiple files at once, just keep in mind, the more files uploaded at once, the longer the upload will take to complete.

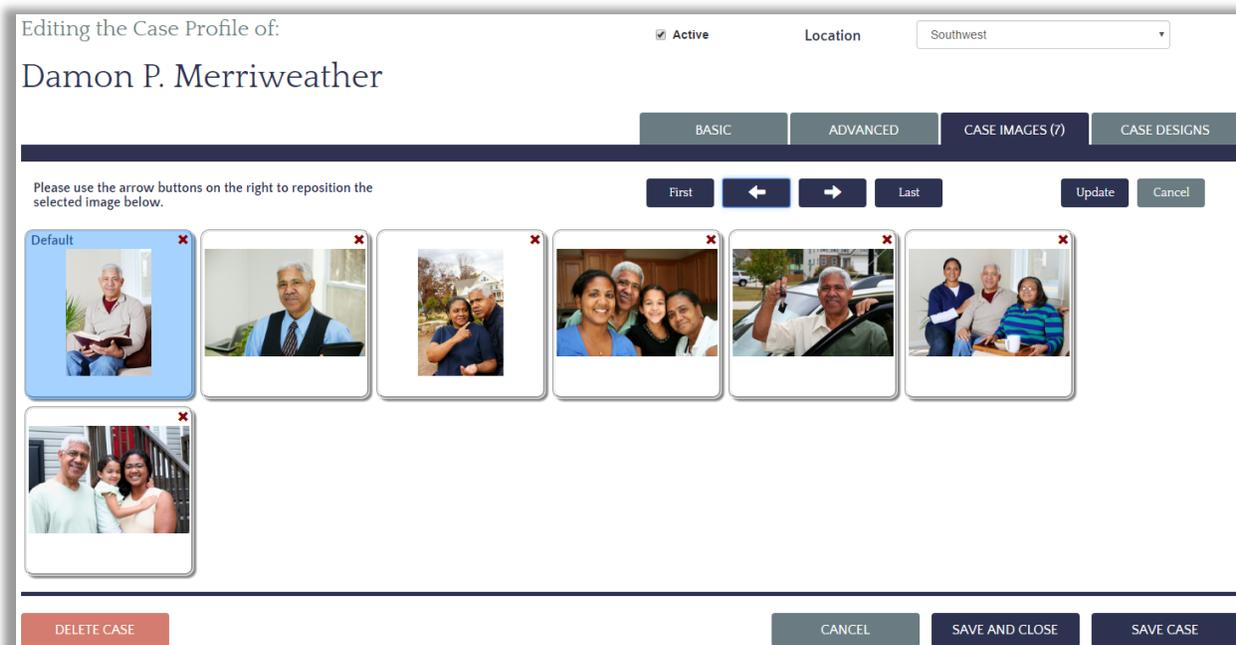


Make It! Personal _{v2}

Once uploaded, you will see a series of tiles displaying the thumbnails. The label of the tab “Case Images” will now show the total count of images in parentheses. To delete photos from the case, click the red “X” in the upper right of the tile. The first image in the sequence will automatically be tagged as the **Default** photo. This will populate a *Default picture placeholder* element, which in most templates is the very first, or “cover” photo.



The remaining photos will populate any given design in sequence. To reorder the sequence of photos to populate in a different manner, click the **Reorder** button. With a photo selected (blue highlight) use the first/last and arrow buttons to shift the photo in sequence. Click **Update** when finished, then **Save Case**.



Case Designs tab

Under the *Case Designs* tab you will find all of the saved designs for that decedent. By default the list is sorted by **Last Modified** date/time, descending. This effectively puts the most recently saved design at the top of the list. This list can however, be sorted by any of the column headings by clicking on the column names.

Clicking the **Create New Design** button will start a new design in your choice of either the FastTrack or the Advanced Designer.

Editing the Case Profile of: **Damon P. Merriweather** Active Location: Southwest

BASIC | ADVANCED | CASE IMAGES (7) | **CASE DESIGNS**

CREATE NEW DESIGN +

Product Type	Series	Product Size	Last Modified		
Bookmarks	Sea of Tranquility Basic	4-Up Perforated (LP)	4/20/2017		
Candle Label	Sea of Tranquility MIP	Premium	4/20/2017		
Display Sheet	Sea of Tranquility MIP	Portrait	4/20/2017		
Register Book	Sea of Tranquility MIP	Large (Mid-Size)	4/20/2017		
Service Folder	Sea of Tranquility MIP	2-UP (CSF) Copy Machine Service Folders	4/20/2017		

DELETE CASE | CANCEL | SAVE AND CLOSE | SAVE CASE

© 2017 Messenger, All Rights Reserved

Clicking on the edit pencil icon  will open that design for editing in the FastTrack.

Clicking on the trash can icon  will delete that design permanently.