

Fee Template

Fee Templates

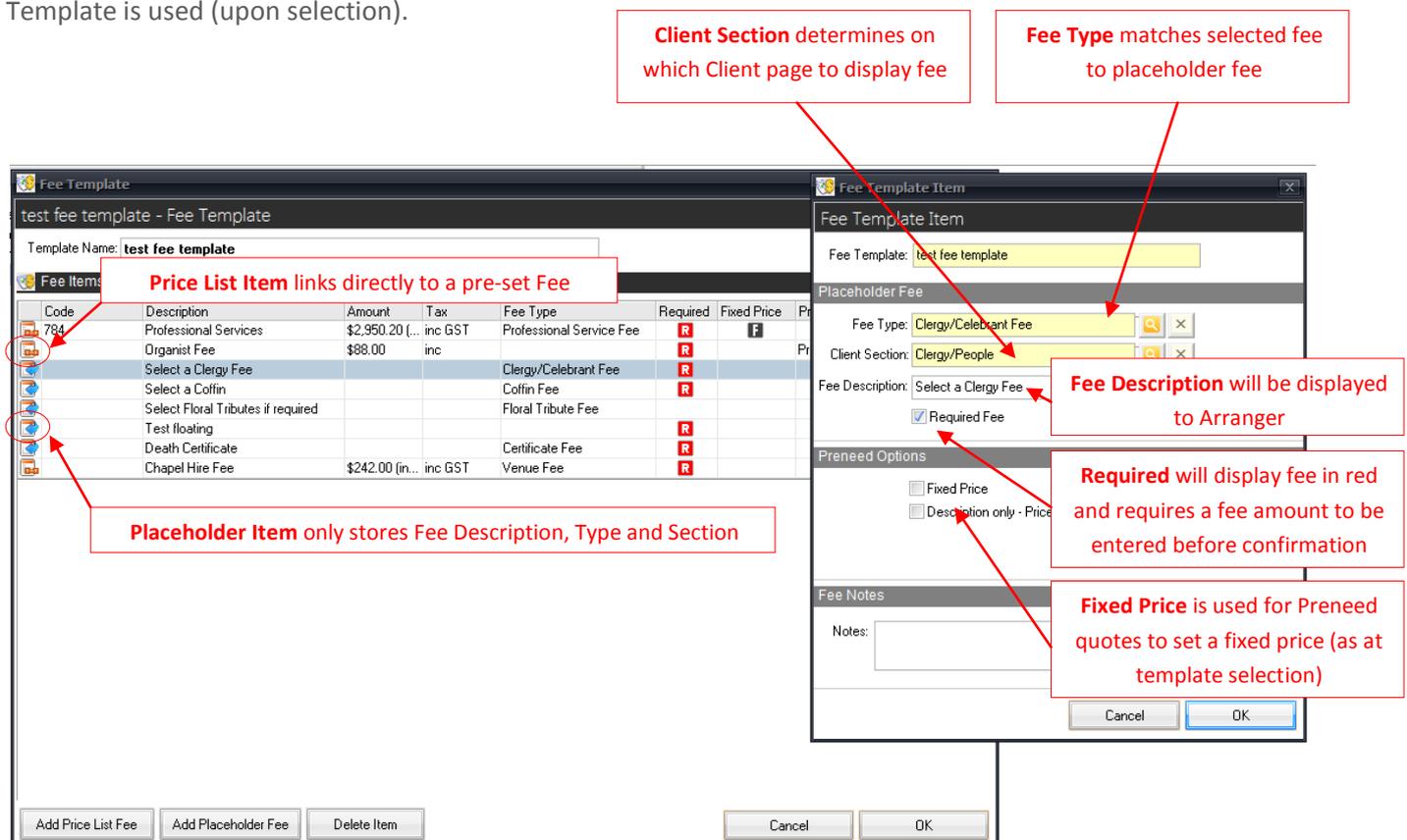
Fee Templates can be used to insert multiple pre-set fees into a Client's Fees Estimate. Whilst a Fee Template can be selected and used manually, it is primarily used and triggered as part of the Funeral Type selection for a client.

Because specific fees for providers and facilities are linked elsewhere, the Fee Template is usually used for baseline fees such as Professional Services and Administration Fees. Any fees that are unlikely to be triggered by Contact or Location selection should be attached to the Fee Template.

Fee Templates and Funeral Types are closely associated and it is suggested that a specific Fee Template is set up for each Funeral Type, although this is not mandatory. You could have a Fee Template shared between multiple Funeral Types.

Fee Template items serve a number of other purposes beside inserting baseline fees. Placeholder fees can be used to ensure any Required Fees are fulfilled by the Funeral Director.

Fee Templates also play a role for Preneed Arrangements. You can use specific Fee Templates available to Pre Need only which may include fees that are Fixed Price. The price of these items are fixed from the time the Fee Template is used (upon selection).



Client Section determines on which Client page to display fee

Fee Type matches selected fee to placeholder fee

Price List Item links directly to a pre-set Fee

Placeholder Item only stores Fee Description, Type and Section

Fee Description will be displayed to Arranger

Required will display fee in red and requires a fee amount to be entered before confirmation

Fixed Price is used for Preneed quotes to set a fixed price (as at template selection)

Code	Description	Amount	Tax	Fee Type	Required	Fixed Price
734	Professional Services	\$2,950.20	inc GST	Professional Service Fee	R	F
	Organist Fee	\$88.00	inc		R	
	Select a Clergy Fee			Clergy/Celebrant Fee	R	
	Select a Coffin			Coffin Fee	R	
	Select Floral Tributes if required			Floral Tribute Fee		
	Test floating				R	
	Death Certificate			Certificate Fee	R	
	Chapel Hire Fee	\$242.00	inc GST	Venue Fee	R	

Required Fees

Marking a fee as required will enforce fee selection/price before fees estimate can be confirmed. Required fees that have a \$0.00 balance will be highlighted in red on the fees estimate. Fees on a template can be marked as required.

Fee Type Linking

In order to limit fee duplication, the Fee Type makes FuneralSoft aware of an existing fee of this type and will fulfill the fee if \$0.00 balance upon further fee selection such as clergy fee.

EXAMPLE

Fee Template includes ->	Clergy Offering	Clergy Fee	\$0.00
Selection of Clergy:	Rev. John Bloggs	Clergy Fee	\$130.00

This would result in Clergy Fee for Rev. Bloggs being inserted into the Clergy Offering fee because the Clergy Offering fee is \$0.00 and of Clergy Fee type.

Placeholder Fees

In many cases fees won't be known until later upon Contact/Location selection. Placeholder fees allow you to insert a Required fee as a reminder that a Fee of that Fee Type is required. This allows later fee selections to fulfill these placeholder fees.

Fixed Price Fees

Prices that have been fixed and are not to be altered can be marked as such. This is relevant primarily to pre-arranged funerals which have fixed-price components.

EXAMPLE FEE TEMPLATE

Dual Venue Service – Chapel & Interment				
Type	Fee Description	Price	Fee Type	Disbursement
Price List	Professional Service Fee	\$3,200.00		
Price List	Chapel Fee	\$270.00		
Placeholder	Interment Fee	\$0.00	Interment Fee	Disbursement
Placeholder	Clergy Offering	\$0.00	Clergy Fee	Disbursement

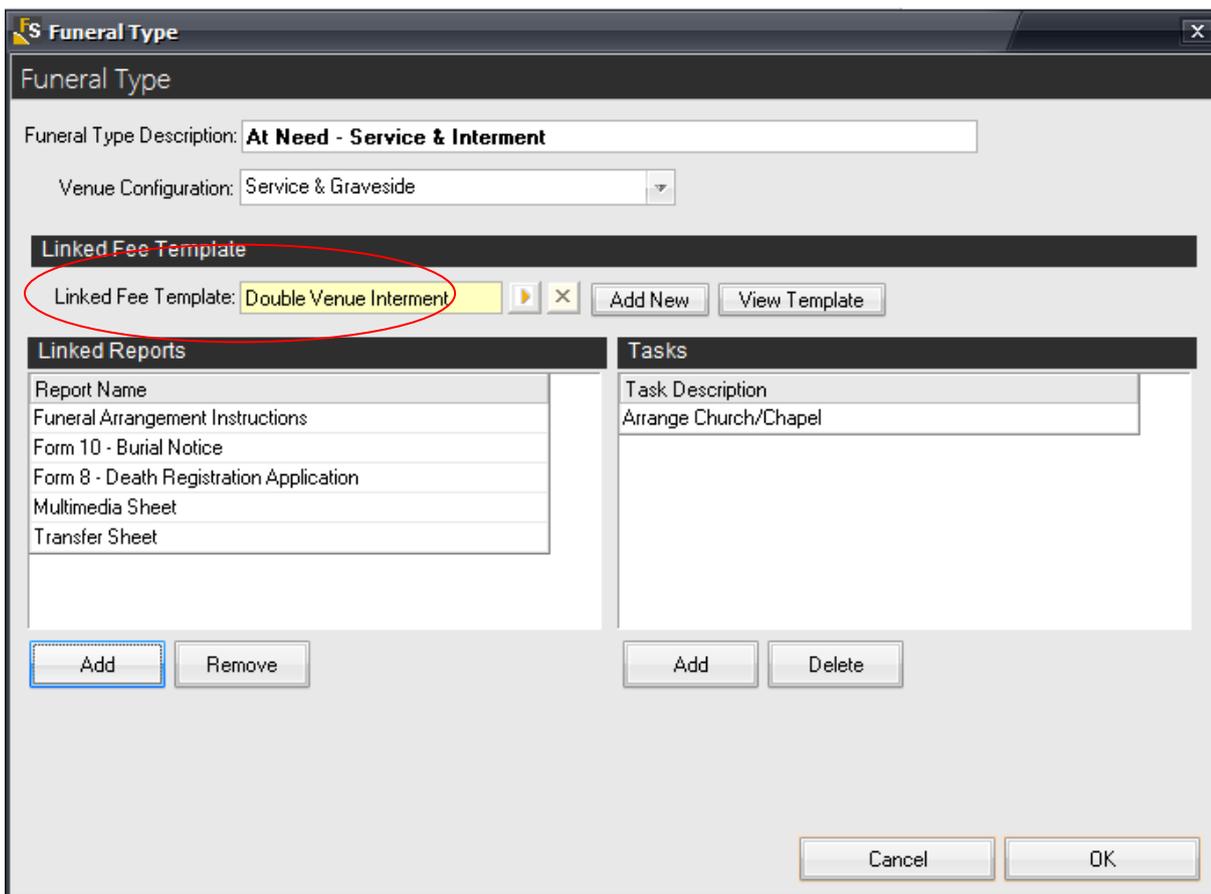
Funeral Types

Funeral Types are used to configure a client file and trigger linked information. You can change the available Funeral Types and make them as specific and varied as you need. You may use Funeral Types to trigger different configurations depending on brand or branch.

Funeral Types apply to Pre Need and At Need arrangements, thus two different sets of types may need to be created.

FUNERAL TYPES EXAMPLE

Code	Description
PRE DV Chapel Interment	Preneed Dual Venue Chapel Service & Interment
PRE SV Interment only	Preneed Graveside Service only
AN DV Chapel Interment	At Need Dual Venue Chapel Service & Interment
AN DV Chapel Cremation	At Need Dual Venue Chapel Service & Cremation
AN Cremation Delivery Only	At Need Cremation Delivery Only



Venue Configuration

Each Funeral Type can be configured with a Venue Configuration which is used to configure the Venues page.

Linked Fee Template

Each Funeral Type can optionally have a Fee Template attached to it. This Fee Template is offered when the Funeral Type is selected. A Funeral Type can only have one Fee Template linked, although each Fee Template may be linked to multiple Funeral Types.

Linked Reports

The essential reports needed for each Funeral Type should be linked. Exclude reports that will be triggered by other sources such as contacts and locations. These reports should everything that *won't* be triggered by other sources. Eg: Funeral Conductor Sheet

Linked Tasks

The essential tasks needed for each Funeral Type should be linked. Exclude tasks that will be triggered by other sources such as contacts and locations. These tasks should everything that *won't* be triggered by other sources. Eg: Complete Transfer

Contact Fees

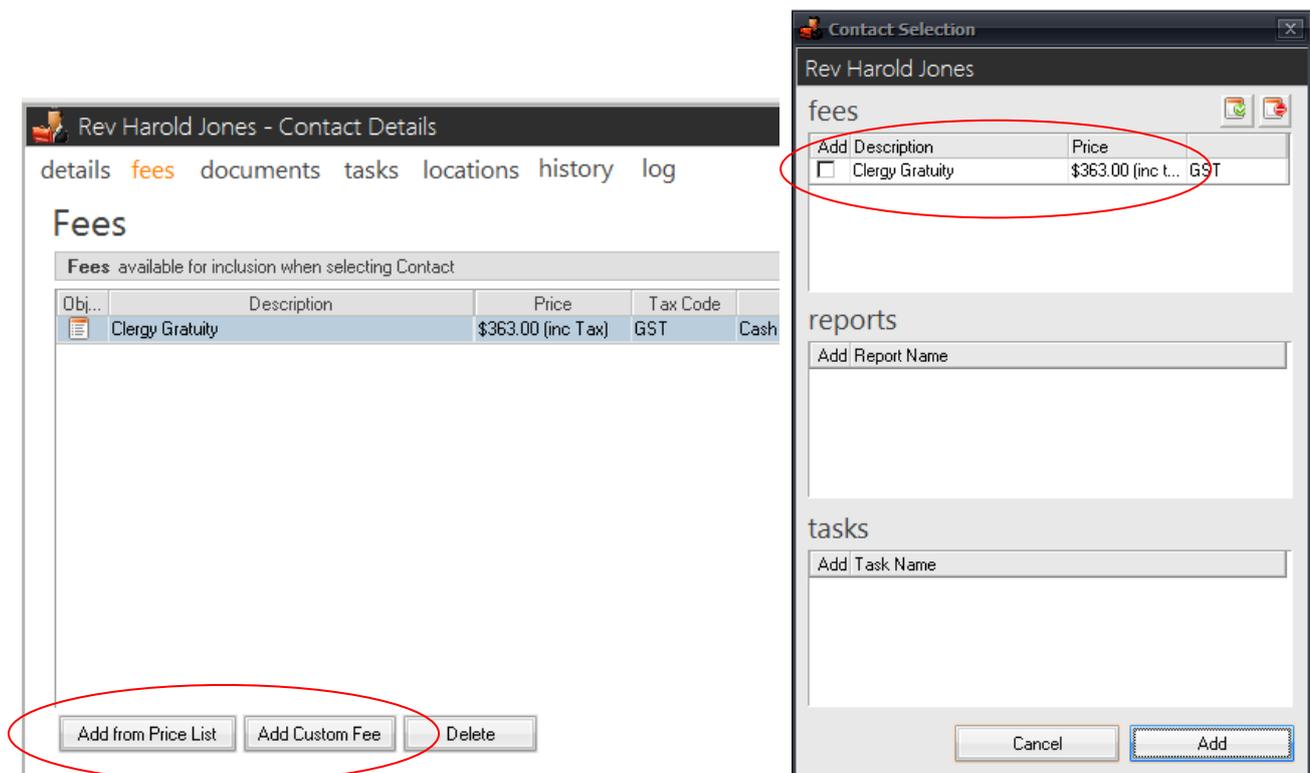
Every provider can be configured with specific fees relating to their provision of services. There are two types of fees that can be setup:

- 1) Generic Price List fees – Linked to a common Fee. Eg: Clergy Fee
- 2) Custom Contact Specific Fees – Fee Linked specifically to this contact. Eg: Rev. Harold Jones Clergy Fee

These Contact Fees will be presented for selection when the Contact is selected in a client arrangement. At this point, the arranger will be able to select one or more available fees and these will be added to the Fees Estimate.

Required Fees (Placeholders)

If any Contact fees have a matching Fee Type as an unfulfilled Required Fee (see Fee Templates) , the contact fee will fulfill (overwrite) the Required Fee.



Rev Harold Jones - Contact Details

details fees documents tasks locations history log

Fees

Fees available for inclusion when selecting Contact

Obj...	Description	Price	Tax Code	
	Clergy Gratuity	\$363.00 (inc Tax)	GST	Cash

Buttons: Add from Price List, Add Custom Fee, Delete

Contact Selection

Rev Harold Jones

fees

Add	Description	Price
<input type="checkbox"/>	Clergy Gratuity	\$363.00 (inc t... GST)

reports

Add Report Name

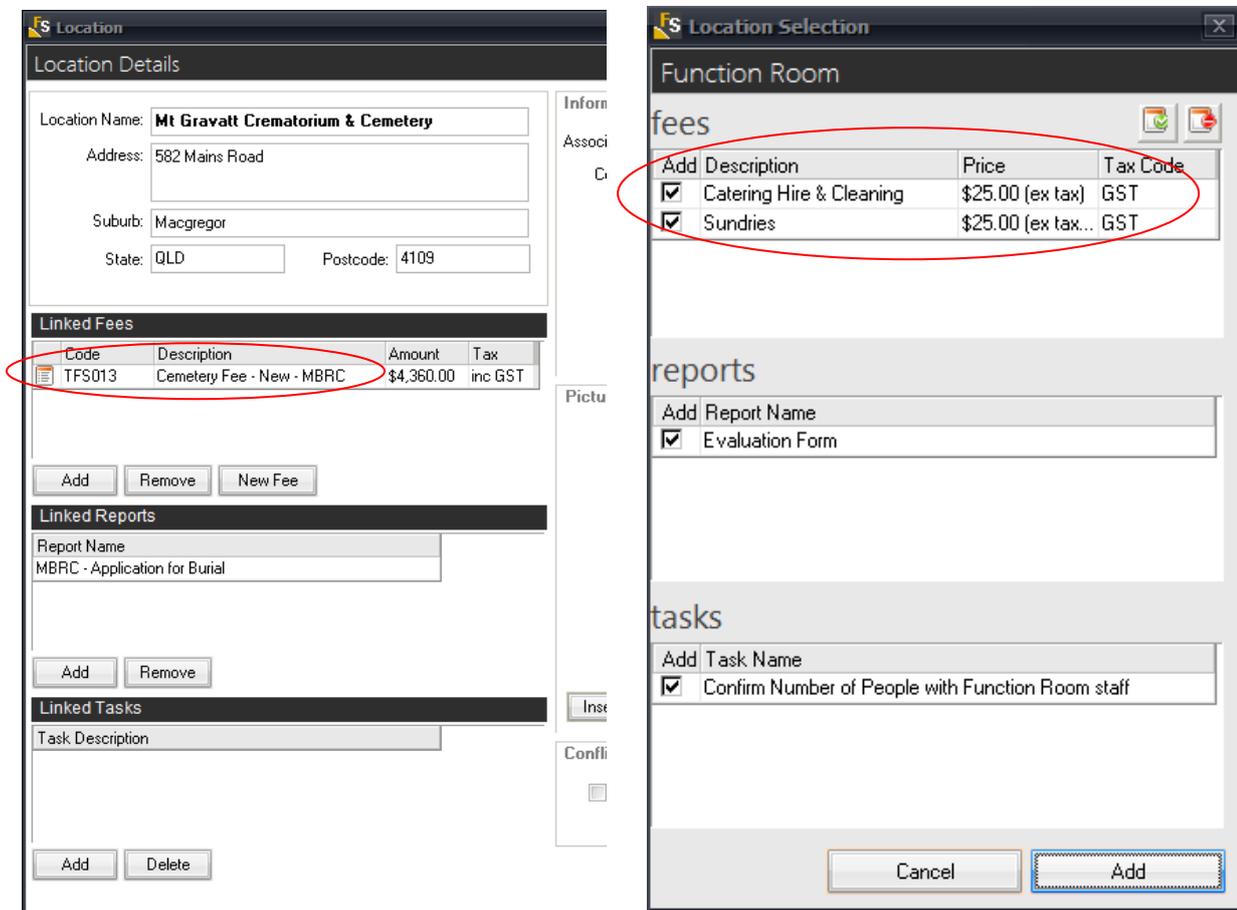
tasks

Add Task Name

Buttons: Cancel, Add

Location Fees

For facility-specific fees such as Chapel Hire or Function Room hire, you can link specific fees to a Location. When the location is selected in a Client File, the arranger will be presented with the available Location Fees for selection. Any fees selected will be added to the client's Fees Estimate.



Location Details

Location Name: **Mt Gravatt Crematorium & Cemetery**
 Address: 582 Mains Road
 Suburb: Macgregor
 State: QLD Postcode: 4109

Linked Fees

Code	Description	Amount	Tax
TFS013	Cemetery Fee - New - MBRC	\$4,360.00	inc GST

Linked Reports

Report Name: MBRC - Application for Burial

Linked Tasks

Task Description:

Location Selection

Function Room fees

Add	Description	Price	Tax Code
<input checked="" type="checkbox"/>	Catering Hire & Cleaning	\$25.00 (ex tax)	GST
<input checked="" type="checkbox"/>	Sundries	\$25.00 (ex tax...)	GST

reports

Add Report Name: Evaluation Form

tasks

Add Task Name: Confirm Number of People with Function Room staff

Fee Features

Individual Fee Confirmation

Fees Estimate items can now be individually confirmed. Double-click a fee and note the 'Price Confirmed' checkbox. This is represented on the Fee Estimate by the  symbol. The overall Fees Estimate still needs to be confirmed and this will confirm all fees.

Required

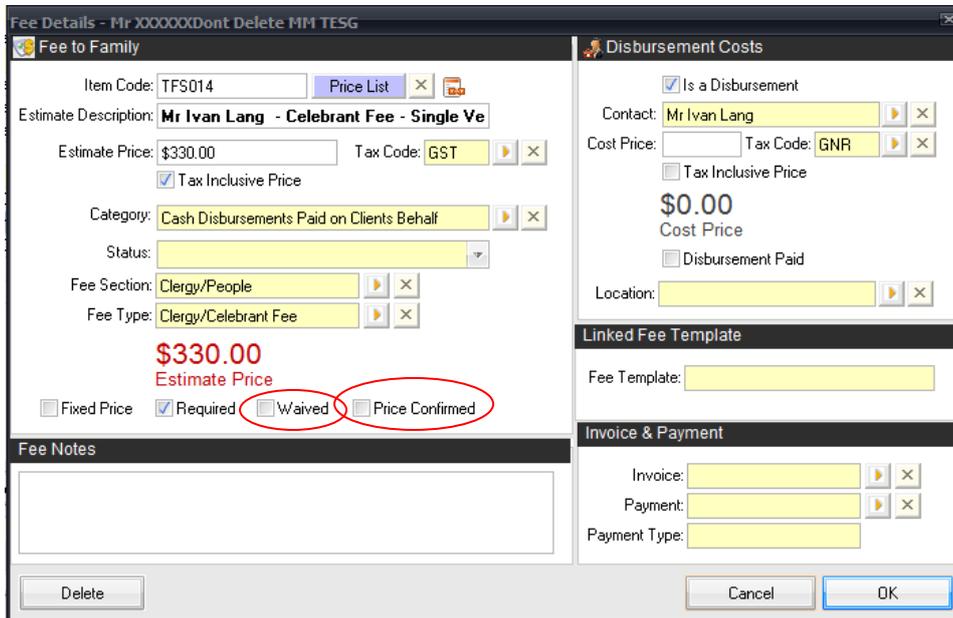
The Required flag is normally used as part of a Fee Template to mark fee items as mandatory. Any fee marked as Required marked as red on the Fees Estimate, but only if the value is \$0.00. Once an amount greater than zero is entered, the fee is considered *fulfilled*.

Waived Fees

Fees can now be individually marked as Waived. This retains the fee item, but reflects it as 'waived' on the Invoice to family. This is represented on the Fees Estimate by the  symbol.

Multiple Invoices

You can now create multiple invoices per client and Fees can now belong to a specific invoice. Once attached to an Invoice, this is represented on the Fees Estimate by the  symbol



Tax Inclusive/Exclusive

The Tax Inclusive checkbox reflects whether to display price as an inclusive or exclusive amount.

Fee Category

The Fee Category determines the header on the Invoice Report the fee will be grouped under. Eg: Cash Disbursements/Funeral Directors Fees

Fee Section

The Fee Section is used to allocate the fee to a particular page in the client file. This is used primarily to add the fee to the page fees list box found on numerous pages. The fee section should be set for each relevant price list item.

Fee Type

The Fee Type is essential when setting up Fee Templates. The fee type links a Placeholder fee to a selected fee when triggered. Eg: If a Fee Template has an item called 'Clergy Offering' with \$0.00 and type 'Clergy Fee', when a Clergy is selected who has fees attached and a fee of 'Clergy Fee' type is selected, FuneralSoft will find the 'Clergy Fee' item, check that it has a \$0.00 balance and then replace it with the selected Fee details.

In this way, the Fee Template is populated with selected fees as you go along.

Disbursement Costs

The Disbursement area details the provider/supplier details and their costs to you. This may be a different amount to the fee to family and represents the purchase cost. Data here has no impact on the fees to family or invoicing, only on disbursement payments.

Linked Contact

If a fee has a linked Contact, this is the nominated supplier of the fee description. By linked Fees to contacts (which happens automatically upon contact selection), you can track the usage and fee history of each contact/supplier. This is used for disbursement payments.

Linked Invoice

If a fee has been added to an Invoice, you will have a linked Invoice number. A fee does not have to belong to an Invoice.

Linked Payment

If a fee has been marked as paid on a Payment, you will have a linked Receipt Number. A fee does not have to belong to a Payment and a Payment does not have to mark fees as linked, but it may be helpful to do so if part payments are received.

Fees List

On many pages, the Fees List will be located in the bottom-right corner. This replaces the old orange fee box and allows multiple fees for the selected page. These fees are one and the same as the Fees Estimate. If fee is confirmed, this is indicated by the  symbol. Double-clicking a fee listed will display the Fee Details.



Setting up

Edit Funeral Types

Click the **Activities** menu

Select **Maintain Lists**

Locate **Funeral Types** under Client group

List of available **Funeral Types** will be displayed on the right.

Double-click to Edit or click Add button at the bottom to add more.

Edit Fee Templates

Click the **Activities** menu

Select **Maintain Lists**

Locate **Fee Templates** under Fees group

List of available **Fee Templates** will be displayed on the right.

Double-click to Edit or click Add button at the bottom to add more.

Edit Contact Fees

Click **Contacts** on the Left side menu

Search/select desired Contact

Double-click the name to edit Contact's file

Click **Fees** header across the top

Click the **Add from Price List** button or the **Add Custom Fee** button

Edit Location Fees

Click the **Activities** menu

Select **Maintain Lists**

Locate **Locations** under General group

List of available **Locations** will be displayed on the right.

Search for Location (white box at top of list)

Double-click to Edit or click Add button at the bottom to add more Locations.