

CIRCLE OF FRIENDS®



FUNERAL DIRECTORS LIFE

# CUSTOMER MANUAL

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# Communication with Families

Now that you have an aftercare system, it's time to start telling families about it! Since you will be communicating via email and text message, it's important that your families know about it in advance and give permission to be contacted.

## Verbal Communication

Start by telling the family about the aftercare service in the arrangement conference.

### Flyer

As you discuss the program, hand the family a flyer with all the information on it. Our Circle of Friends+ Flyer for families is customized for you, and you can order more at any time. You can also provide this in a folder along with any of your other brochures and offerings.

## Here's a sample script to use:

"We know that even though the service ends, the grieving process doesn't. We also know your family has a lot of difficult tasks to do beyond the funeral. That's why we want to stay in touch after the service through our Circle of Friends aftercare. Basically, if you agree to be enrolled, you'll get email newsletters and text messages with helpful information about settling an estate and grief support. Other families tell us this is so helpful for all the questions that come up even after the service. Would it be OK if we enrolled you in the program?"



# Enrollment Instructions using Online Access

Once the family agrees to be enrolled, it's time to set them up to receive the texts and email newsletters!

**Enrolling online is as easy as:**

**1** Log in to Online Access

**2** Find the "Family & Friends" Tab

**3** Submit Contacts



# 1

## Step 1: Log in to Online Access

Go to <https://app.funeraldirectorslife.com>.  
Log in with your username and password.

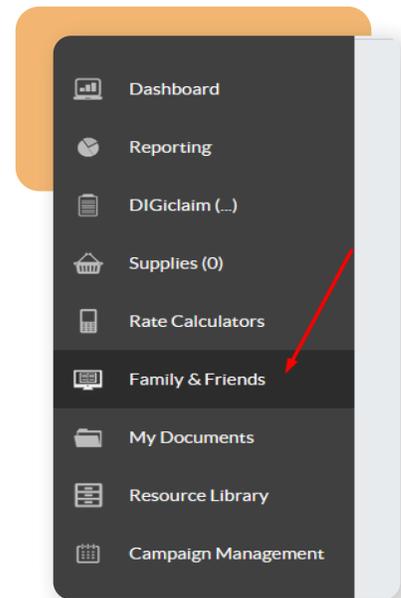
If you do not have a username and password,  
contact [help@funeraldirectorslife.com](mailto:help@funeraldirectorslife.com).

A screenshot of the login page. It features a white background with a light blue border. At the top, there is a 'Username' label above a text input field. Below that is a 'Password' label above another text input field. A checkbox labeled 'Remember Me' is positioned below the password field. A dark blue button with the text 'Log In' is centered below the checkbox. Below the button, there is a link that says 'Forgot your username or password?'. At the bottom left, it asks 'Are you a new user?' and at the bottom right, there is a 'Register Now' button.

# 2

## Step 2: Find the "Family & Friends" Tab

In the navigation column on the left-hand side, find the  
"Family & Friends" tab. Click on the tab to go to the  
submission page.



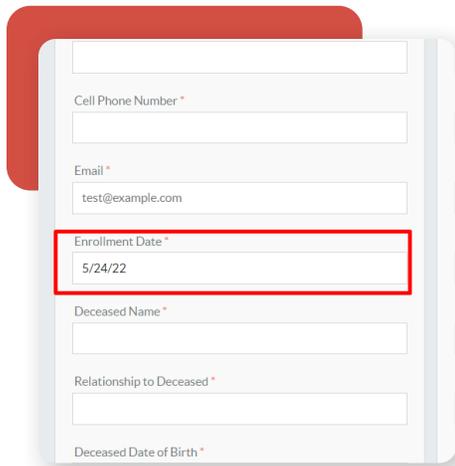
# 3

## Step 3: Submit Contacts

Select a funeral home location at the top.  
Fill in the information  
in each blank.

A screenshot of the 'Family & Friends' submission page. The page has a light gray background. At the top left, there is a search bar with the text 'Search agents, funeral homes, and policies'. Below the search bar, the page title 'Family & Friends' is displayed. Underneath the title, there is a section labeled 'Selected Funeral Home \*' with a dropdown menu that says 'select funeral home location'. Below this, there are two columns of form fields. Each column has four fields: 'First Name \*', 'Last Name \*', 'Cell Phone Number \*', and 'Email \*'. The 'Email \*' fields are pre-filled with 'test@example.com'. A dark blue navigation menu is visible on the left side of the page, with 'Family & Friends' selected.

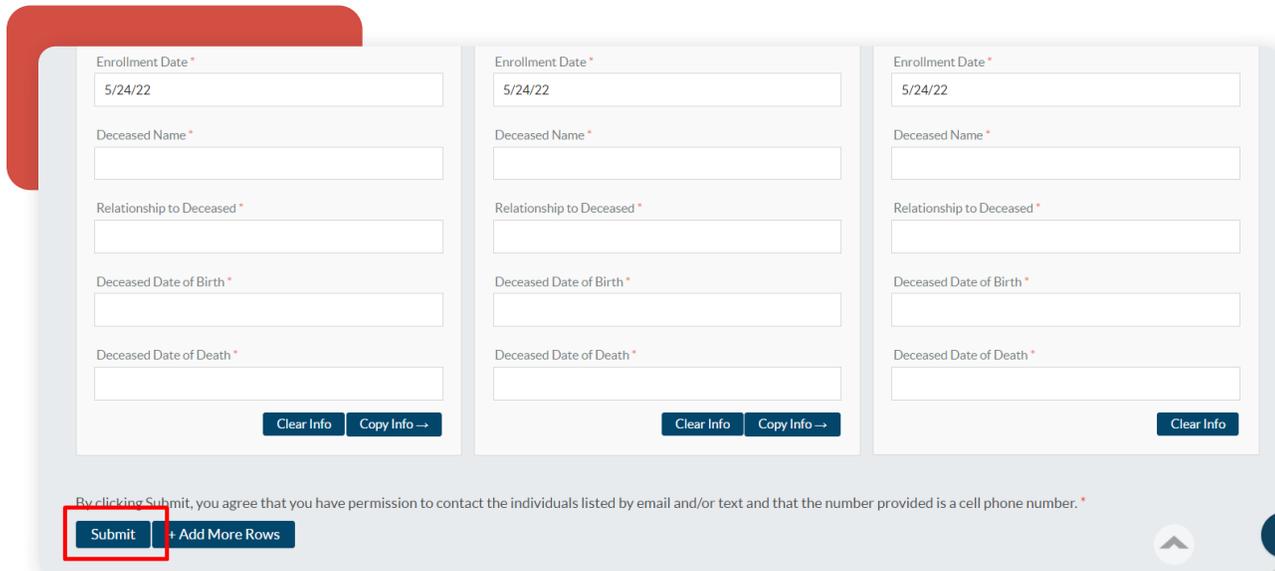
### Step 3: Submit Contacts (continued)



A screenshot of a contact form. The fields are: Cell Phone Number (empty), Email (test@example.com), Enrollment Date (5/24/22, highlighted with a red box), Deceased Name (empty), Relationship to Deceased (empty), and Deceased Date of Birth (empty).

The “**Enrollment Date**” will default to the current date, but you can change the date to a time in the future if desired. This is helpful if a family is having a funeral soon, but you want the program to start after the funeral so the family begins getting texts and emails after the service.

Once the information is entered, you will click “**Submit**” at the bottom of the screen.



A screenshot showing three identical contact forms side-by-side. Each form has the Enrollment Date field filled with 5/24/22. At the bottom of the forms, there are buttons for 'Clear Info' and 'Copy Info ->'. Below the forms, a disclaimer reads: 'By clicking Submit, you agree that you have permission to contact the individuals listed by email and/or text and that the number provided is a cell phone number.\*' At the bottom left, the 'Submit' button is highlighted with a red box, and next to it is a '+ Add More Rows' button.

## That’s it!

Families will be enrolled in the Circle of Friends+ program and begin receiving texts and emails.

# Enrollment Instructions using Bulk Import

If you want to add previous families you've served, you may want to do a bulk import rather than entering contacts one by one.

## Follow the steps below:

**1** Download the bulk import spreadsheet from [www.funeraldirectorslife.com/circle-of-friends-resources](http://www.funeraldirectorslife.com/circle-of-friends-resources)

**2** Fill in the information for each contact

**3** Email your spreadsheet to [cof@funeraldirectorslife.com](mailto:cof@funeraldirectorslife.com)

Families will be enrolled in the Circle of Friends+ program and begin receiving texts and emails.

# Enrollment Instructions using **passare**<sup>®</sup>

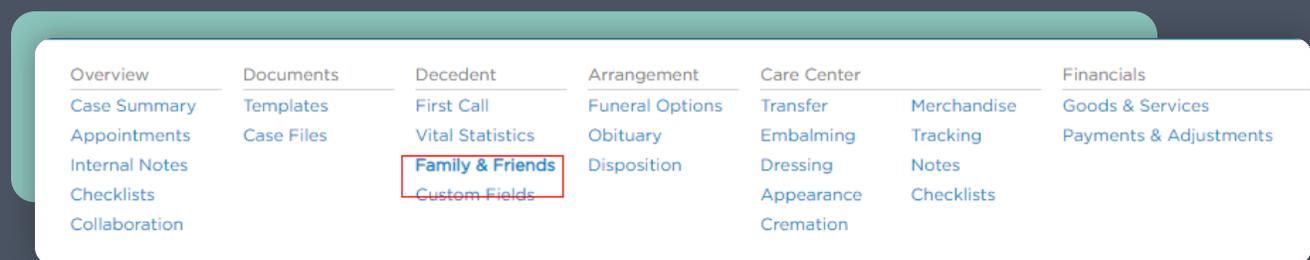
With **Passare**, you would have already entered all the family members' names and contact information when you worked on the case.

**Enrolling this way is as easy as:**



## Step 1: Find Family & Friends

After entering the At-Need Case information for the *Decedent*, you will go to the **"Family & Friends"** tab under *Decedent*.



| Overview       | Documents  | Decedent                    | Arrangement     | Care Center | Financials  |                        |
|----------------|------------|-----------------------------|-----------------|-------------|-------------|------------------------|
| Case Summary   | Templates  | First Call                  | Funeral Options | Transfer    | Merchandise | Goods & Services       |
| Appointments   | Case Files | Vital Statistics            | Obituary        | Embalming   | Tracking    | Payments & Adjustments |
| Internal Notes |            | <b>Family &amp; Friends</b> | Disposition     | Dressing    | Notes       |                        |
| Checklists     |            | Custom Fields               |                 | Appearance  | Checklists  |                        |
| Collaboration  |            |                             |                 | Cremation   |             |                        |

Not using **Passare** for digital case management? Go to [www.passare.com](http://www.passare.com) to learn more.

## Step 2: Enter Contact Info

Make sure you have the following information entered for every family member who needs to receive aftercare:

- First Name
- Last Name
- Relationship
- Email Address
- Phone Number

The screenshot shows the 'Add Family/Friend' form. The 'Person' dropdown is selected. The 'First Name' field contains 'Test', 'Last Name' contains 'Person', and 'Relationship' contains 'Spouse'. The 'Roles' dropdown is set to 'Select Here'. The 'Last Name at Birth', 'Wedding Date', and 'Wedding Place' fields are empty. The 'Email Address' field contains 'test.test@gmail.com' and the 'Mobile Phone' field contains '(123) 456-7890'. There is a checkbox for 'Send Planning Center Invite' at the bottom.

\*\*If no email address or phone number is added, they cannot be enrolled.

## Step 3: Sign your contracts.

For contacts to come over to the aftercare program, the case MUST be signed within 30 days. Click **“Goods & Services”** tab under *Financials*.

The screenshot shows a navigation menu with the following sections: Overview, Documents, Decedent, Arrangement, Care Center, and Financials. Under the 'Financials' section, the 'Goods & Services' tab is highlighted with a red box. Other tabs in the 'Financials' section include 'Payments & Adjustments'. Other sections include 'Case Summary', 'Appointment', 'Internal Notes', 'Checklists', 'Collaboration', 'Templates', 'Case Files', 'First Call', 'Vital Statistics', 'Family & Friends', 'Custom Fields', 'Funeral Options', 'Obituary', 'Disposition', 'Transfer', 'Embalming', 'Dressing', 'Appearance', 'Cremation', 'Merchandise', 'Tracking', 'Notes', and 'Checklists'.

This will take you to the signing page. Click **“Yes”** to sign and put in the correct date. Then click **“Save.”**

The screenshot shows the 'Sign' form. The question is 'Do you want to indicate that the family has signed this contract? Any modifications made to the Itemized Bill will show up as refunds and additions.' The 'Yes' radio button is selected. The 'Signing Date' is set to '05/12/2022' and the time is '1:00pm'. There are also 'No' and 'Today' options. A 'History' link is at the bottom.

\*\*If for some reason you do not wish to sign your cases in **Passare**, there is another option. Please reach out to [cof@funeraldirectorslife.com](mailto:cof@funeraldirectorslife.com) for step-by-step instructions.

## What if a person does not want to be contacted?

If the contact does NOT want to be enrolled in the aftercare program, you must select the **“Do Not Contact”** checkbox. This is located under the *Contact Information* on the right-hand side. Check the **“Do Not Contact”** box and click **“Save.”**

# Reports and How to Manage Responses

Thanks to our live text responder, families are always going to get quick answers if they reply to a text message. The text responder will always make sure to assess the engagement of the contacts before sending a request for

Google Reviews. So, most of the time, you won't have to do anything, but you can rest easy knowing that your families are staying in touch and that you're making an impact on them during a difficult time.



Want to see text responses?  
You'll receive these in a weekly report sent via email.

## Here's how it works:

**May 03** BERTA ALEXANDER  
Received the Circle of Friends Guide 

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BOYD SAWYER  
Received the Circle of Friends Guide 

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JEANE CHAMPION  
Received Circle of Friends Grief Support 

### Urgent Messages

For urgent messages from a family, our live text responder will email the question immediately to your team. You may need to call the family that day to answer the question. The live responder will let the family know that you will be reaching out.

#### Here's some typical questions that come up:

- "I need to make another payment."
- "Where are my death certificates?"
- "Has the permanent memorial been completed yet?"

**May 04** BERTA ALEXANDER 

Thank you for your help

You're most welcome, Berta. We hope this resource may be useful. We're here for you should you need us.

Emma thank you so very much. I'm doing good so far.the VA is going to help me with his benefits, and they

### All Messages

Your Weekly Report shows all text replies from contacts. You can also keep track of your reviews and view growth over time.

**Please note:** Weekly Reports only count families who are receiving text messages. If a family is only signed up for email notifications, they are not counted in the total Enrolled Families on this report. The Weekly Report is sent every Wednesday evening and contains data from the previous week, Monday through Friday.

|   |      |
|---|------|
| Enrolled Families<br>The running total of families you've helped for all time                 | 33   |
| Average Review Rating<br>A calculation of total ratings divided by total reviews for all time | 3.2★ |
| Total Google Reviews<br>An update of your cumulative reviews for all time                     | 9    |

And don't forget, at any time you can reach out to [cof@funeraldirectorslife.com](mailto:cof@funeraldirectorslife.com) for any questions!

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