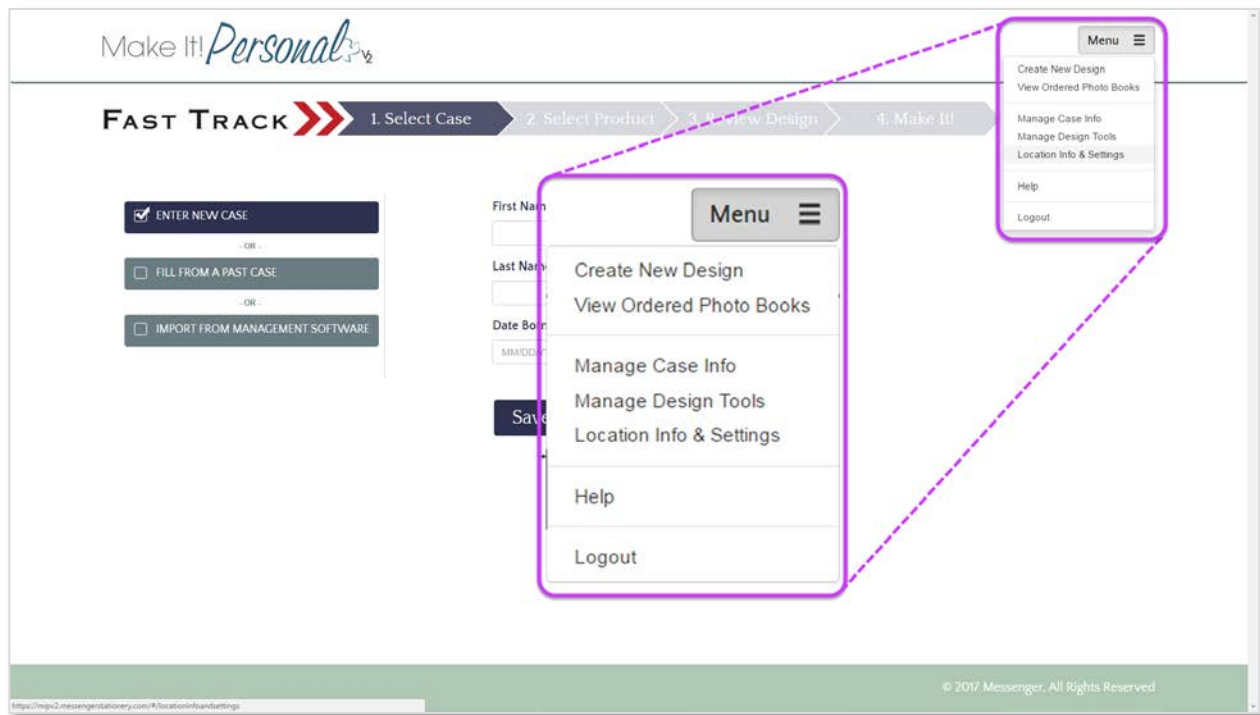


Location Info & Settings

In Make It Personal all the information regarding your Funeral Home's location/locations serves several purposes – to help accurately identify your Make It Personal account, and it allows you to incorporate these pieces of information on your stationery designs. Every decedent case in MIP will be associated with a location defined in this area. This allows Funeral Homes with multiple locations to more easily sort and filter their case lists. This is also where you will maintain your user account login information, and define any custom field descriptions.

You can access these settings from anywhere in the program by clicking the **Menu** button in the upper right of the screen, and choosing **Location Info & Settings**.



Please note that new MIP accounts must setup a default location with two fields required: Funeral home Name, and Location Name. You will be unable to save cases until this info has been entered.

Locations Tab

Location Info and Settings (Locations tab) screen at a glance:

Make It! *Personal* v2 Menu

Location Info and Settings

LOCATIONS CUSTOM FIELDS USERS

Location: Northshore ADD LOCATION

Use this Location as the Default

* Funeral Home Name: Benjamin's Crematorium & Memorial

* Location Name: Northshore

Location Manager Name: Robert Belcher

Location GUID: e1b13e12-800a-4644-be87-5c4f5be8fa4e

Director Name(s): Melinda Belcher

Address: 21 Jumpstreet

City: Port Wayne

State: IN

Postal Code: 12345

Country: USA

Phone Number: 555-555-5555

Fax Number:

Website Address: www.google.com

Email Address: messenger@messengerfc.com


Professional Organizations:


ORGANIZATIONS ▲

I.O.O.F ✎ ✕

Organization Name

ADD ORGANIZATION

Location Logo:  Upload Logo

Location Picture:  Upload Picture

DELETE LOCATION CANCEL SAVE LOCATIONS

© 2017 Messenger, All Rights Reserved

Location Info and Settings

The screenshot shows the 'Location Info and Settings' form. At the top, there are three tabs: 'LOCATIONS', 'CUSTOM FIELDS', and 'USERS'. The 'LOCATIONS' tab is active. The form contains the following elements:

- 1**: A dropdown menu for 'Location' with 'Northshore' selected.
- 2**: An 'ADD LOCATION' button.
- 3**: A text input field for '* Funeral Home Name' containing 'Benjamin's Crematorium & Memorial'.
- 4**: A text input field for 'Location GUID' containing 'e1b13e12-800a-4544-be87-5c4f5be8fa4e'.
- 5**: A checkbox labeled 'Use this Location as the Default' which is checked.
- Other fields include '* Location Name' (containing 'Northshore') and 'Location Manager Name' (containing 'Robert Belcher').

- | | |
|--------------------------------------|---|
| 1. Location drop-down | Selects which location to edit |
| 2. Add Location button | Adds a new Funeral Home location to the drop-down list |
| 3. Funeral Home Name / Location Name | Minimum fields required to define a location, you must have at least one location entered to begin creating cases |
| 4. Location GUID | A unique ID number associated with each Funeral Home location |
| 5. Use this Location as the Default | Toggles a location's status as the Default Location. Unless explicitly changed, all new cases created will be automatically associated with the Default Location. |

Saving/Deleting a Location:

After making any changes, be sure to scroll down and click **Save Locations**. To delete a location, simply click **Delete Location**. You must remove the selection of Default Location before you can delete that location.



Locations tab – Logo/Picture:

Each MIP account can accommodate one logo image, plus one additional image. These images can be incorporated on stationery designs, and even saved on custom template layouts. Simply click the Upload Logo or Upload Picture button to browse to an image file for upload. Images must be in .jpg or .png format.



Custom Fields

In Make It Personal you can define the labels for up to 10 custom fields. Simply input the custom verbiage you desire in the fields and click **Save Custom Fields**,

Make It! Personal ^{3.2} Menu

Location Info and Settings

LOCATIONS CUSTOM FIELDS USERS

Custom Field 1 Name: Doorman Custom Field 2 Name: Driver

Custom Field 3 Name: Custom Field 4 Name:

Custom Field 5 Name: Custom Field 6 Name:

Custom Field 1 Name: Doorman Custom Field 2 Name: Driver

CANCEL SAVE CUSTOM FIELDS

© 2017 Messenger. All Rights Reserved

Remember, that here you are defining the name or label defining that custom field for all cases/designs globally in Make It Personal. The case specific information will be entered on a case by case basis in the Case Profile as pictured below. (**Manage Case Info > edit a case > Advanced tab > Custom Fields**)

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

BASIC ADVANCED CASE IMAGES (7) CASE DESIGNS

CUSTOM FIELDS

Doorman Driver

Bill Swerski Wes Jordanson

Custom 3 Custom 4

Custom 5 Custom 6

Doorman Driver

Bill Swerski Wes Jordanson

DELETE CASE CANCEL SAVE AND CLOSE SAVE CASE

Users

The final section under Location Info & Settings is the **Users** tab. This is where you can add, remove, and maintain the list of users for your account. There are two types of user login accounts:

Admin – This is the login that is created when a customer first registers for a MIP account. This account has full privileges within the system, with the ability to add, delete, and edit all user logins associated with this account. As well, this login has full permission to add, delete or modify any custom texts, templates, and design elements saved to the account.

Sub-user – These are the additional user logins that can be added by the admin user for the account. These accounts cannot add, delete, or modify any other user logins on the account. As well, sub-users can only save/overwrite custom templates in the “*My Templates*” (user-level) category, and cannot overwrite custom templates in the “*Our Templates*” (Funeral Home level) category.

For more on templates and their permissions, click [here](#).

The screenshot displays the 'Users' management interface. At the top, there's a navigation bar with 'LOCATIONS', 'CUSTOM FIELDS', and 'USERS' tabs. The 'USERS' tab is active. On the left, a table lists existing users: 'Admin, Benjamin Stephens' and 'S, Benny'. Each user has an edit (pencil) icon and a delete (trash) icon. On the right, a form for adding a new user is visible, with fields for 'First Name', 'Last Name', 'Email Address', 'Username', 'Password', and 'Re-enter Password'. A red 'ADD USER' button is positioned below the form. The footer of the page reads '© 2017 Messenger, All Rights Reserved'.

ALL passwords must be at least 7 characters long, and must contain at least 1 non-alphanumeric character(s).

To ADD a user, fill out all fields (required) and click the **Add User** button.

To EDIT a user, click the **edit pencil** icon to the right of their name.

To DELETE a use click the **trash icon** to the right of their name.