



eCondolence

The Resource for Condolences and Mourning

A large, decorative graphic on the left side of the page consisting of several interlocking loops in shades of purple, blue, and gold, mirroring the eCondolence logo icon.

Aftercare Guide

For assistance please call 877.362.3266 or email service@econdolence.com

Welcome to the eCondolence Aftercare guide. Here you will find step-by-step instructions for setting up your funeral home's program.

The eCondolence Aftercare solution provides sequenced follow-up with families through meaningful touchpoints that help build deep relationships. This allows you to send customizable, automated emails from your funeral home to families on important dates, including the deceased's birthday, the anniversary of passing, holidays, etc.

Aftercare Settings for Your Funeral Home:

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Setting Up Aftercare for Families

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Initial Setup of Your Funeral Home's Aftercare

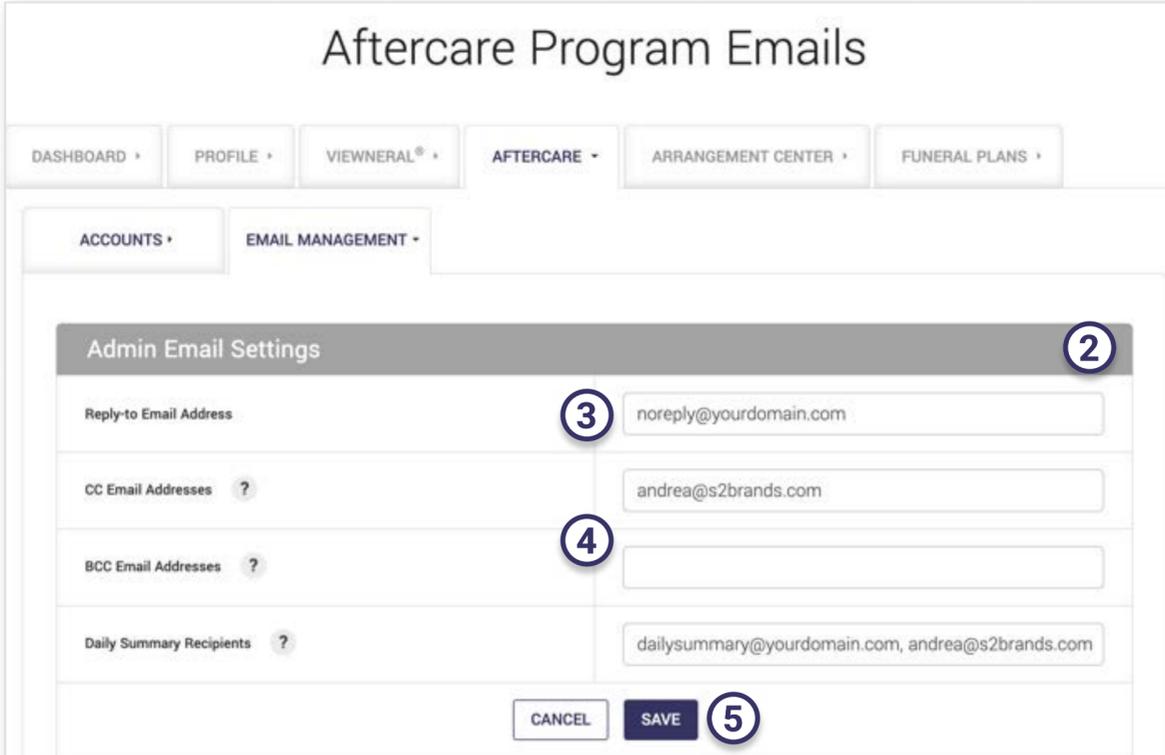
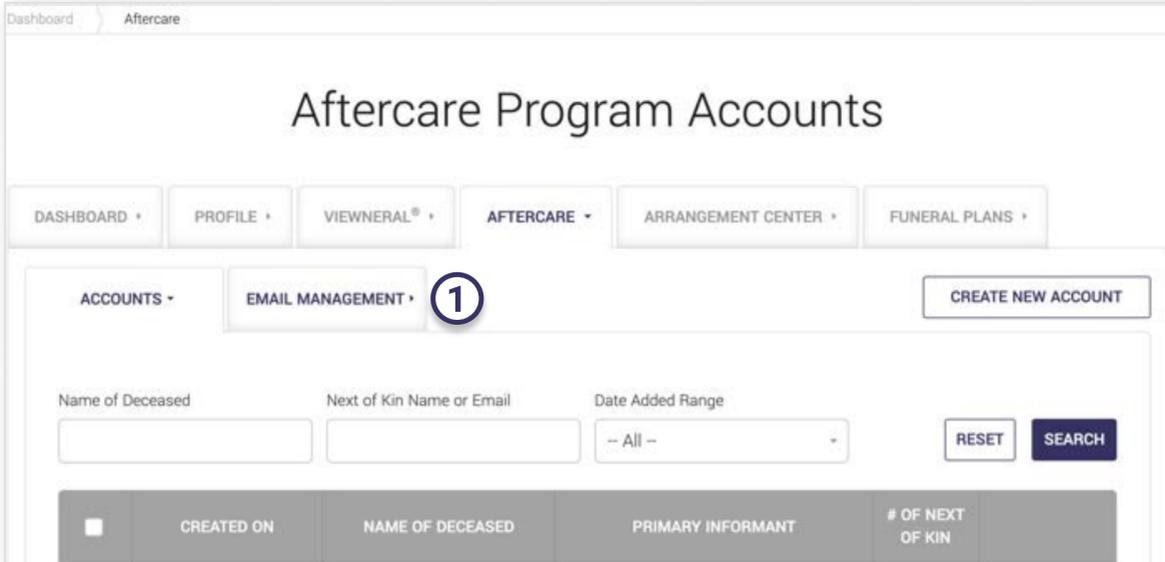
Log In

Log in to your eCondolence.com account and select FH Management at the top of the page, then click on your funeral home's name. Once on the Dashboard, select the AFTERCARE tab. Here you will see tabs for ACCOUNTS and EMAIL MANAGEMENT.

Please Note: Before creating any new accounts, you will need to configure your funeral home's Admin Email Settings. Once saved, you can create aftercare accounts for families.

Configure Administrative Email Settings for Your Funeral Home

1. Go to the **EMAIL MANAGEMENT** tab
2. Click the **EDIT** icon that appears to the right of "Admin Email Settings"
3. Change the "Reply-to Email Address". This is the email address that receives messages when recipients click reply in messages they receive. This should always be a monitored address.
4. Input the funeral home email address(es) you would like to receive copies of each email sent to the family:
 - a. Copied (CC) on each email
 - b. Blind copied (BCC) on each email
 - c. Daily Summary Recipients. This is the email address(es) that will receive a daily summary email of Aftercare emails being sent out from this location.
5. Click **SAVE**



How to Enable Email Templates to Your Aftercare Program

During your initial aftercare program setup, you will need to select the email templates you want enabled for your funeral home location.

Enable Email Templates

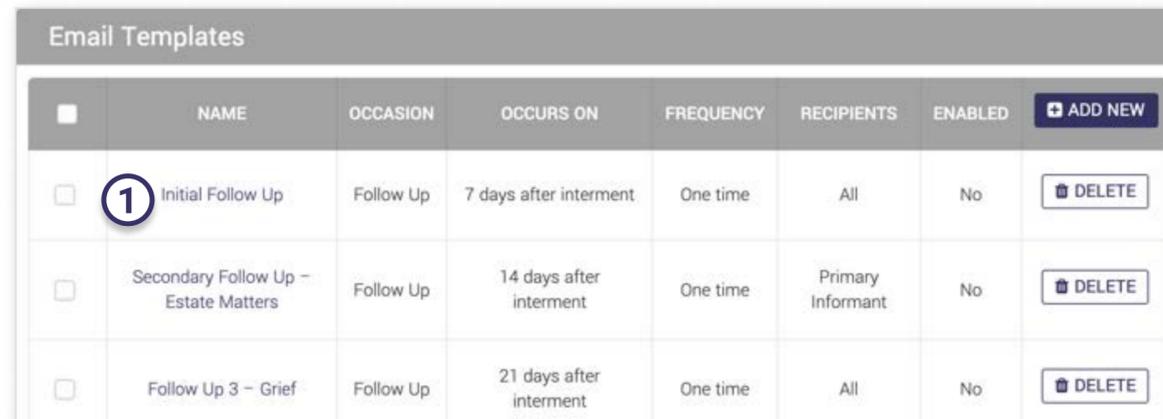
Go to the EMAIL MANAGEMENT tab. Below the Admin Email Settings is the list of email templates enabled for your program.

1. Click the name of the template you want to enable for your program (e.g. Initial Follow Up)
2. Click the **EDIT** icon on the right
3. Check **ENABLE**
4. Click the **SAVE** button that appears at the bottom of the email
5. Click **BACK TO LIST**

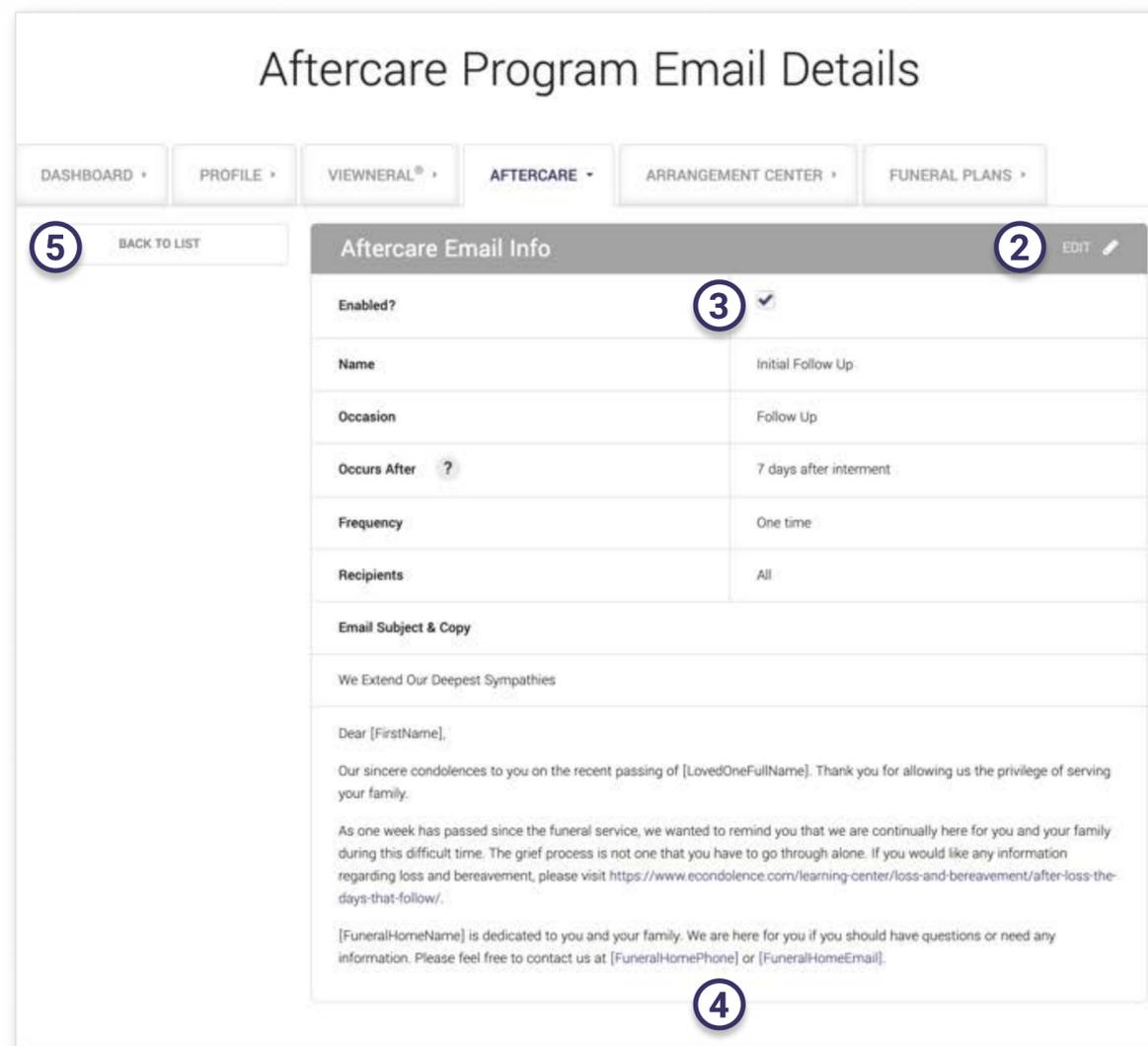
Please repeat this process for all templates you want to include in your funeral home's aftercare program.

NOTES:

- Enabling a template makes it available for you to use in any family account. When you create the family account (page 7) you will be able to specify which emails they receive.
- You will also have the option to edit email templates which will be covered on the next page.



	NAME	OCCASION	OCCURS ON	FREQUENCY	RECIPIENTS	ENABLED	ADD NEW
<input type="checkbox"/>	1 Initial Follow Up	Follow Up	7 days after interment	One time	All	No	DELETE
<input type="checkbox"/>	Secondary Follow Up – Estate Matters	Follow Up	14 days after interment	One time	Primary Informant	No	DELETE
<input type="checkbox"/>	Follow Up 3 – Grief	Follow Up	21 days after interment	One time	All	No	DELETE



Aftercare Program Email Details

DASHBOARD • PROFILE • VIEWNERAL® • **AFTERCARE** • ARRANGEMENT CENTER • FUNERAL PLANS •

5 BACK TO LIST

Aftercare Email Info

2 EDIT

Enabled? 3

Name: Initial Follow Up

Occasion: Follow Up

Occurs After ? 7 days after interment

Frequency: One time

Recipients: All

Email Subject & Copy

We Extend Our Deepest Sympathies

Dear [FirstName],

Our sincere condolences to you on the recent passing of [LovedOneFullName]. Thank you for allowing us the privilege of serving your family.

As one week has passed since the funeral service, we wanted to remind you that we are continually here for you and your family during this difficult time. The grief process is not one that you have to go through alone. If you would like any information regarding loss and bereavement, please visit <https://www.econdolence.com/learning-center/loss-and-bereavement/after-loss-the-days-that-follow/>.

[Funeral-HomeName] is dedicated to you and your family. We are here for you if you should have questions or need any information. Please feel free to contact us at [Funeral-HomePhone] or [Funeral-HomeEmail].

4

How to Edit Email Templates

Once you have selected the emails you would like to include in your program, you have the option to edit the email templates.

Edit Email Templates

Go to the EMAIL MANAGEMENT tab to see the full list of email templates.

1. Click the name of the template you want to edit (e.g. Initial Follow Up).
2. Click the **EDIT** icon on the right (not shown)
3. You may now edit the email details:
 - a. Name
 - b. Occasion
 - c. Occurrence or when the email will be sent (e.g. 7-days after interment)
 - d. Frequency
 - e. Recipients (either Primary Informant, Next of Kin, or both)
4. You may also edit the email Subject line, Copy, and Style of the text for the body of the email*
5. Click **UPDATE** to save changes
6. Click on **BACK TO LIST**

Repeat this process and customize any email templates you have chosen to include in your funeral home's program.

Please Note: Any edits made to the templates will affect every recipient. You cannot customize a template to a particular family, you can only customize it for your location.

* Any text appearing in [brackets] will be dynamically filled with account specific information. It is recommended to (or you?) leave these sections alone unless you wish to remove them from the template. The list of available dynamic fields is located below the body text editor.

	NAME	OCCASION	OCCURS ON	FREQUENCY	RECIPIENTS	ENABLED	ADD NEW
<input type="checkbox"/>	1 Initial Follow Up	Follow Up	7 days after interment	One time	All	Yes	DELETE
<input type="checkbox"/>	Secondary Follow Up - Estate Matters	Follow Up	14 days after interment	One time		Yes	DELETE
<input type="checkbox"/>	Follow Up 3 - Grief	Follow Up	21 days after interment	One time		Yes	DELETE

Aftercare Program Email Details

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6 BACK TO LIST

Aftercare Email Info **2**

Enabled?	<input checked="" type="checkbox"/>
Name	Initial Follow Up
Occasion	3 Follow Up
Occurs After ?	7 days after interment
Frequency	One time
Recipients	<input checked="" type="checkbox"/> Primary Informant <input checked="" type="checkbox"/> Next of Kin

4 Email Subject & Copy

We Extend Our Deepest Sympathies

Dear [FirstName],

Our sincere condolences to you on the recent passing of [LovedOneFullName]. Thank you for allowing us the privilege of serving your family.

As one week has passed since the funeral service, we wanted to remind you that we are continually here for you and your family during this difficult time. The grief process is not one that you have to go through alone. If you would like

Design ↔ HTML

Available dynamic tags: [FirstName], [LastName], [FullName], [LovedOneFirstName], [LovedOneLastName], [LovedOneFullName], [FuneralHomeName], [FuneralHomePhone], [FuneralHomeEmail], [YahrzeitCalendar]

CANCEL UPDATE **5**

How to Add New Templates to Your Funeral Home's Aftercare Program

In addition to the templates available in eCondolence Aftercare, you have the option to add new email templates for your funeral home.

Add New Email Templates

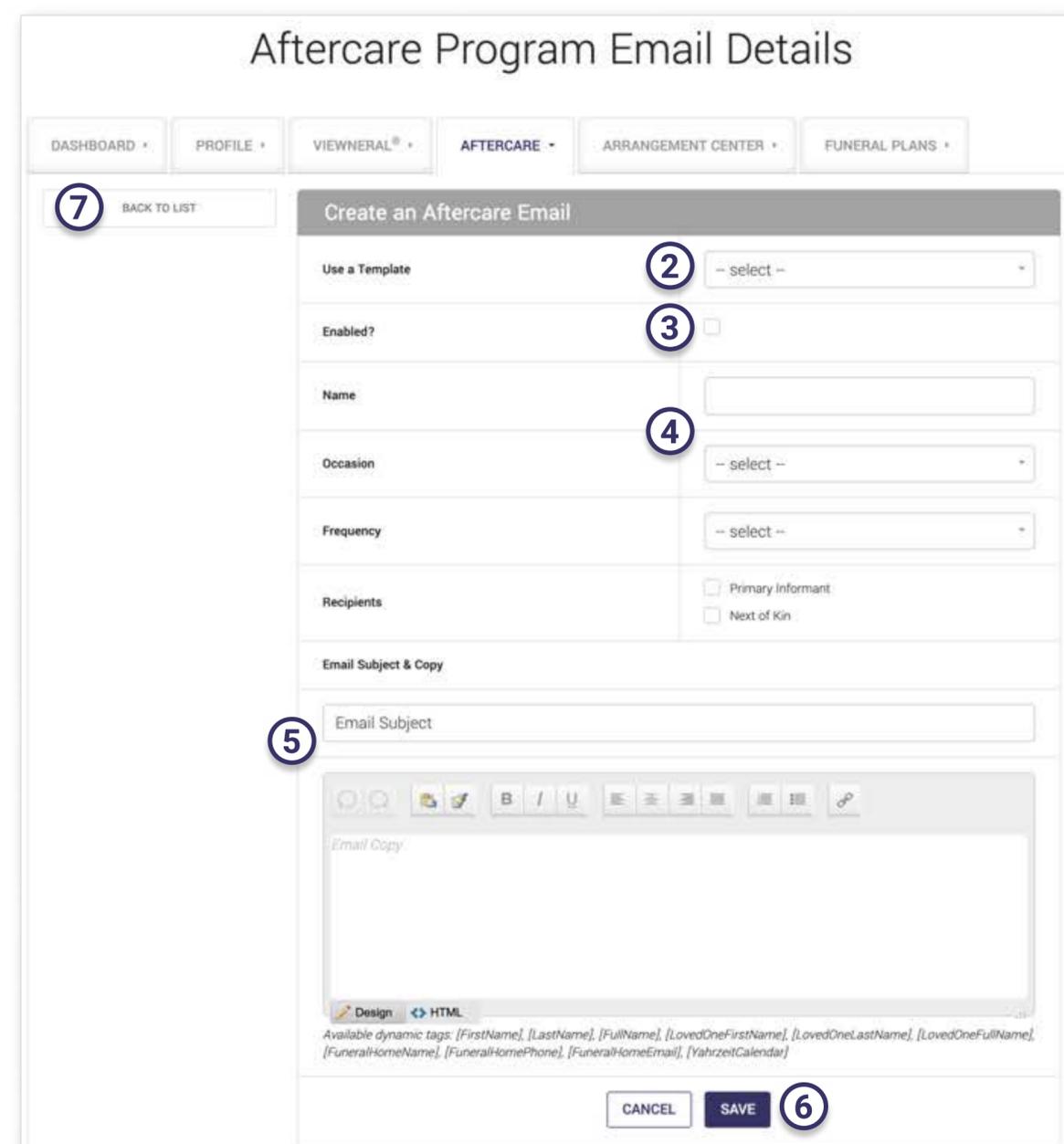
Go to the EMAIL MANAGEMENT tab to see the list of email templates enabled for your program.

1. Click the **+ ADD NEW** button
2. The default “– select –” allows you to create a new template or choose from the dropdown to modify an existing template (recommended).
3. Check **ENABLE**
4. When creating a new template, input or select the following:
 - a. Name (title of the email)
 - b. Occasion
 - c. Frequency
 - d. Recipients (Primary Informant, Next of Kin, or both)
5. You may also edit the email:
 - a. Subject line
 - b. Copy
 - c. Style of the text for the body of the email
6. Click **SAVE**
7. Click **BACK TO LIST**

This email will now appear at the bottom of the list on the Aftercare Program Emails page on the EMAIL MANAGEMENT tab.



	NAME	OCCASION	OCCURS ON	FREQUENCY	RECIPIENTS	ENABLE	1	+ ADD NEW
<input type="checkbox"/>	Initial Follow Up	Follow Up	7 days after interment	One time	All	Yes		DELETE



Aftercare Program Email Details

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7 BACK TO LIST

Create an Aftercare Email

Use a Template 2 – select –

Enabled? 3

Name 4

Occasion – select –

Frequency – select –

Recipients Primary Informant
 Next of Kin

Email Subject & Copy

5 Email Subject

Email Copy

Design HTML

Available dynamic tags: [FirstName], [LastName], [FullName], [LovedOneFirstName], [LovedOneLastName], [LovedOneFullName], [FuneralHomeName], [FuneralHomePhone], [FuneralHomeEmail], [YahrzeitCalendar]

CANCEL SAVE 6

How to Create a New Family Account

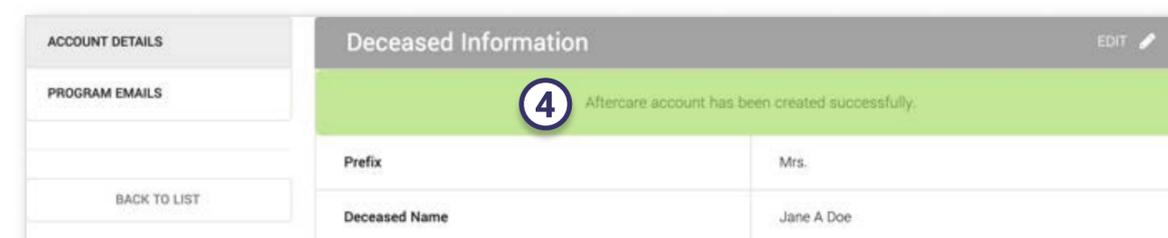
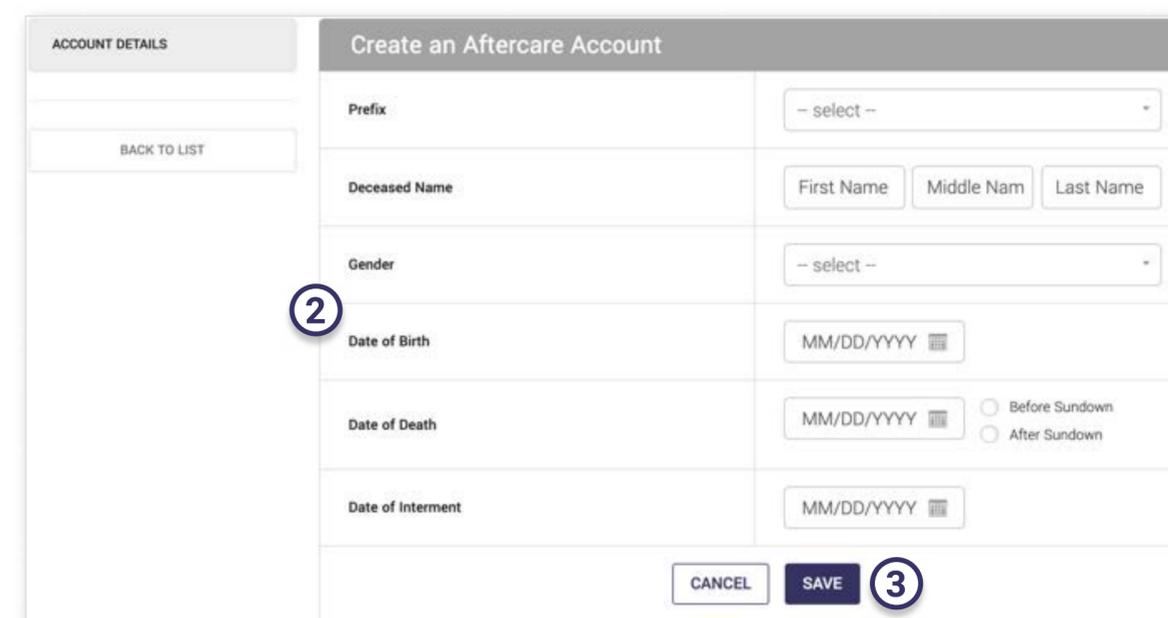
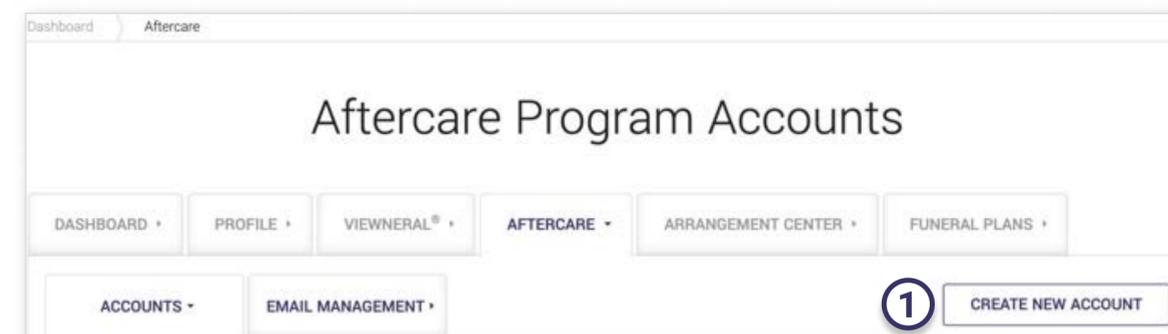
After enabling and customizing your funeral home's aftercare settings you can now create a family aftercare account. If you would like to review and confirm which emails are enabled, go to the EMAIL MANAGEMENT tab.

Create an Aftercare Account for a Family

Go to the Aftercare Program Accounts page and ACCOUNTS tab.

1. Click the **CREATE NEW ACCOUNT** button
2. Fill in the required information for the deceased:
 - a. First, Middle, and Last Name
 - b. Gender
 - c. Date of Birth
 - d. Date of Passing
 - e. Whether they passed before or after sundown, and
 - f. Date of interment
3. Click **SAVE**
4. You will see a green notification bar that the "Aftercare account has been created successfully"

In the next step, you will enter the information for the Primary Informant on the account as well as the Next of Kin and additional recipients.



How to Add Contacts to an Account

Once a family account has been created you will see a new section below to add the Primary Informant, Next of Kin, and any additional recipients to the account.

Add Recipients

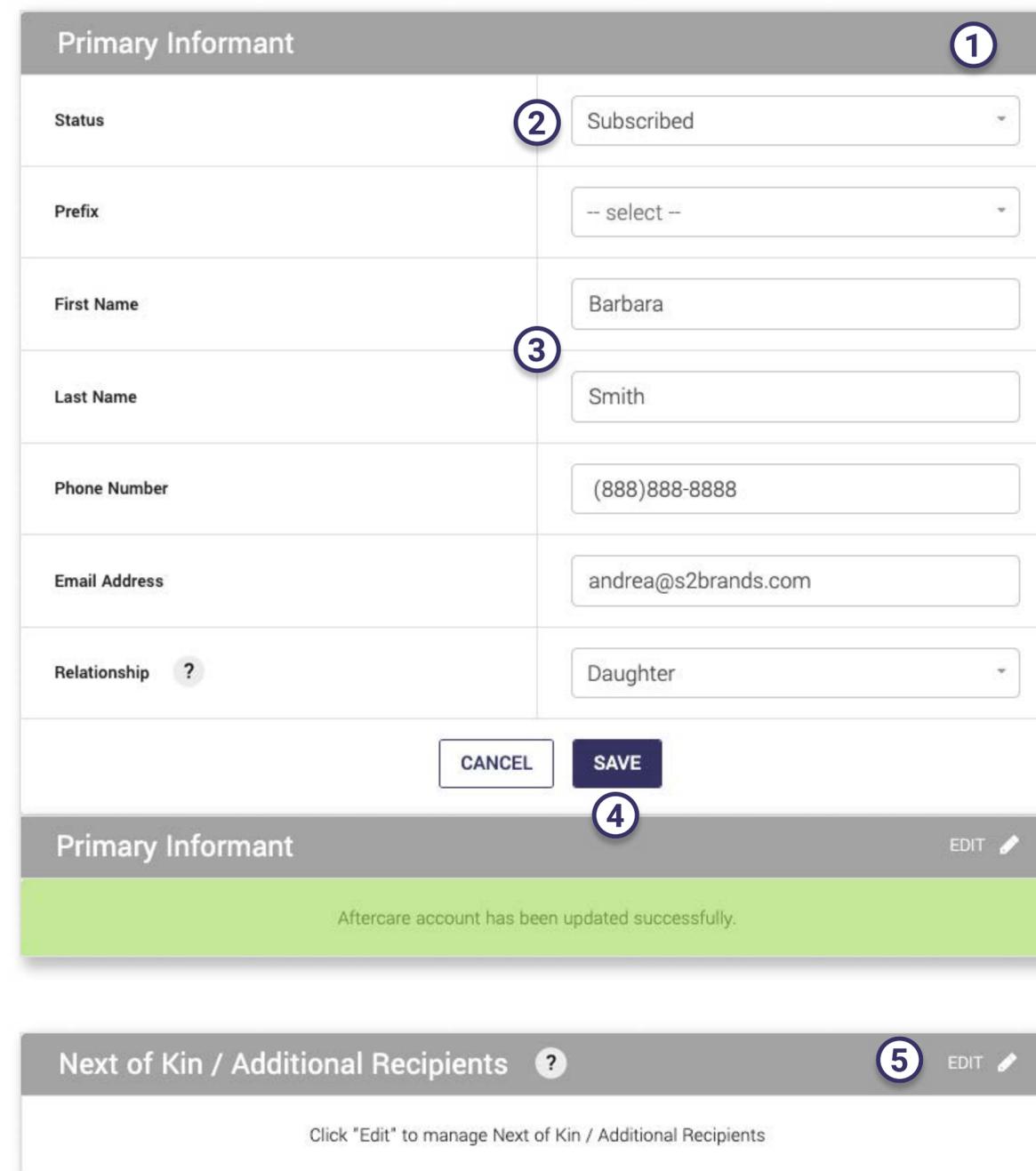
1. Click the **EDIT** icon to the right of Primary Informant
2. The status defaults to Subscribed*
3. Fill in the required information
4. Click **SAVE**. You should see a notification that says “Aftercare account has been updated successfully.”
5. Repeat the same steps for Next Of Kin

To add more recipients, click the **EDIT** icon in the Next of Kin / Additional Recipients section, click **ADD NEW**, and follow the steps above.

IMPORTANT:

In the next step, you will add the templates you want the family to receive as part of their aftercare program. This **MUST** be done for the Primary Informant and additional recipients to receive emails.

* If a family asks to Unsubscribe, locate the contact in the account, select the “Unsubscribe” option from the Status dropdown and click **SAVE**. Families can also unsubscribe directly from the aftercare emails they receive and the system will update this field.



The screenshot shows a form titled "Primary Informant" with a header bar containing the title and a circled "1" next to an "EDIT" icon. The form fields are: "Status" (dropdown menu with "Subscribed" selected, circled "2"), "Prefix" (dropdown menu with "-- select --" selected), "First Name" (text input with "Barbara" entered, circled "3"), "Last Name" (text input with "Smith" entered), "Phone Number" (text input with "(888)888-8888" entered), "Email Address" (text input with "andrea@s2brands.com" entered), and "Relationship" (dropdown menu with "Daughter" selected, circled "3"). Below the fields are "CANCEL" and "SAVE" buttons, with the "SAVE" button circled "4". Below the form is a green notification bar that says "Aftercare account has been updated successfully." Below this is another header bar for "Next of Kin / Additional Recipients" with a circled "5" next to an "EDIT" icon and a question mark icon. Below this header bar is a text box that says "Click 'Edit' to manage Next of Kin / Additional Recipients".

How to Select Emails for Family Accounts

Once you have created the family account and input the corresponding recipients (pages 7 and 8) you will now select the emails you would like the family to receive.

IMPORTANT:

- You will only be able to select emails **ENABLED** on the **EMAIL MANAGEMENT** tab (page 4)
- The following steps must be done for each Aftercare account

Enable Emails for the Family Account

From the main Aftercare Program Account page, click the ACCOUNTS tab.

1. Click on the name of the deceased (e.g. Mrs. Jane Doe)
2. Select **PROGRAM EMAILS** on the left
3. Note that in the **ENABLED** column, all of the emails will say "No"
4. Click the **EDIT** icon on the right
5. Check the boxes of the emails you like to enable for this family
6. Click the **SAVE** button at the bottom

Your family account setup is complete. The family will begin to receive aftercare emails according to the "Occurs On" Date. You will also be able to see any emails sent out on the Daily Summary.

If you have any questions, please contact us at 877.362.3266.

CREATED ON	NAME OF DECEASED	PRIMARY INFORMANT	# OF NEXT OF KIN
Tue, Jun 08, 2021 09:05 PM	1 Mrs. Jane Doe	Barbara Smith (Daughter) (888)888-8888 andrea@s2brands.com	0

ACCOUNT DETAILS	Deceased Information
PROGRAM EMAILS 2	Prefix: Mrs.
	Deceased Name: Jane Doe

ACCOUNT DETAILS	Aftercare Program Emails ? 4																		
PROGRAM EMAILS	<table border="1"> <thead> <tr> <th>ENABLED</th> <th>NAME</th> <th>OCCASION</th> <th>OCCURS ON</th> <th>FREQUENCY</th> <th>RECIPIENTS</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>Initial Follow Up</td> <td>Follow Up</td> <td>7 days after interment</td> <td>One time</td> <td>Next of Kin Bob Doe (andrea@s2brands.com)</td> </tr> <tr> <td>3 No</td> <td>Secondary Follow Up – Estate Matters</td> <td>Follow Up</td> <td>14 days after interment</td> <td>One time</td> <td></td> </tr> </tbody> </table>	ENABLED	NAME	OCCASION	OCCURS ON	FREQUENCY	RECIPIENTS	No	Initial Follow Up	Follow Up	7 days after interment	One time	Next of Kin Bob Doe (andrea@s2brands.com)	3 No	Secondary Follow Up – Estate Matters	Follow Up	14 days after interment	One time	
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