



eCondolence

The Resource for Condolences and Mourning



Viewneral®

Scheduled Gatherings Guide

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

How to Get Started

Welcome to the eCondolence Scheduled Gatherings guide. Here you will find step-by-step instructions for setting up Scheduled Gatherings for your families. **Please note: this allows you to schedule a Virtual Gathering in advance for the family for a single event.**

Once the Scheduled Gathering is entered into the system, the designated coordinator will receive correspondence regarding the hosting and sharing links as well as the ability to start the Virtual Gathering directly from the email.

Log In to Your Funeral Home's Account

Login 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, you will see the Gatherings box. You may also select Gatherings from the Viewneral® drop-down menu.

PLEASE NOTE:

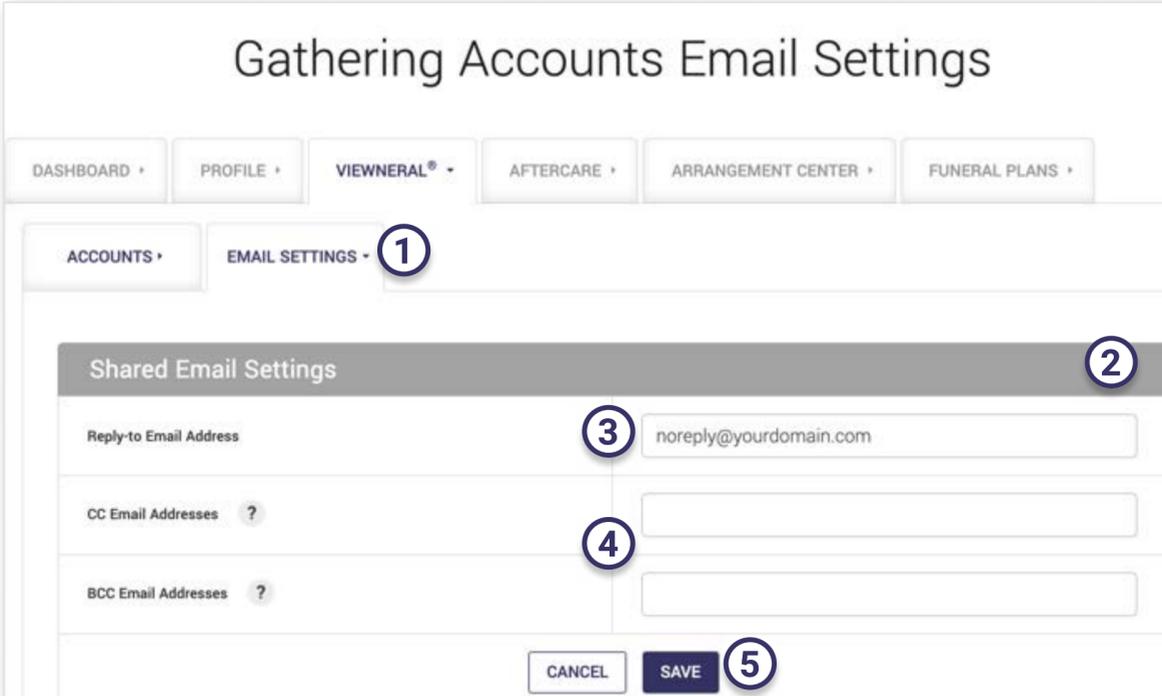
The designated coordinator of the Scheduled Gathering must have the Zoom app installed prior to starting the Virtual Gathering.

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

Configure Administrative Email Settings for Your Funeral Home

Before creating a Scheduled Gathering, please edit your email settings.

1. On the Gathering Accounts page select the "Email Settings" tab.
2. Select "**EDIT**" to the right of "Shared Email Settings".
3. Change the "Reply-to Email Address". This is the email address that the family may reply to when they receive an automated email about their gathering.
4. Next, 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
5. Once you have input the email addresses you would like to receive correspondence, click "**SAVE**".

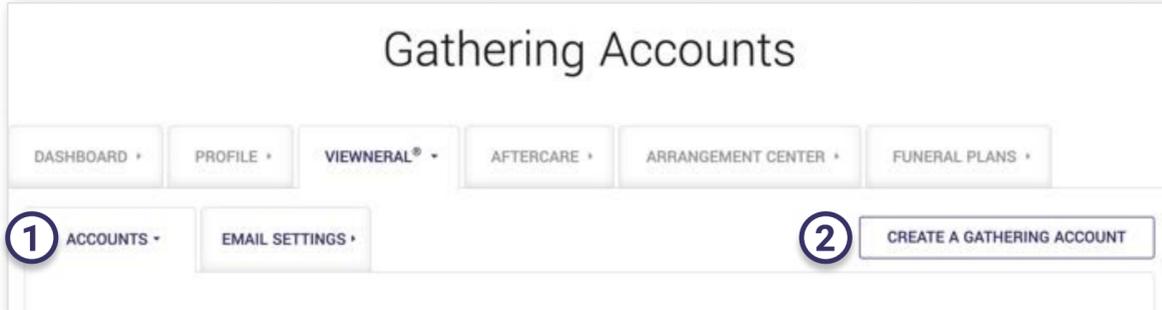


How to Create a Scheduled Gathering

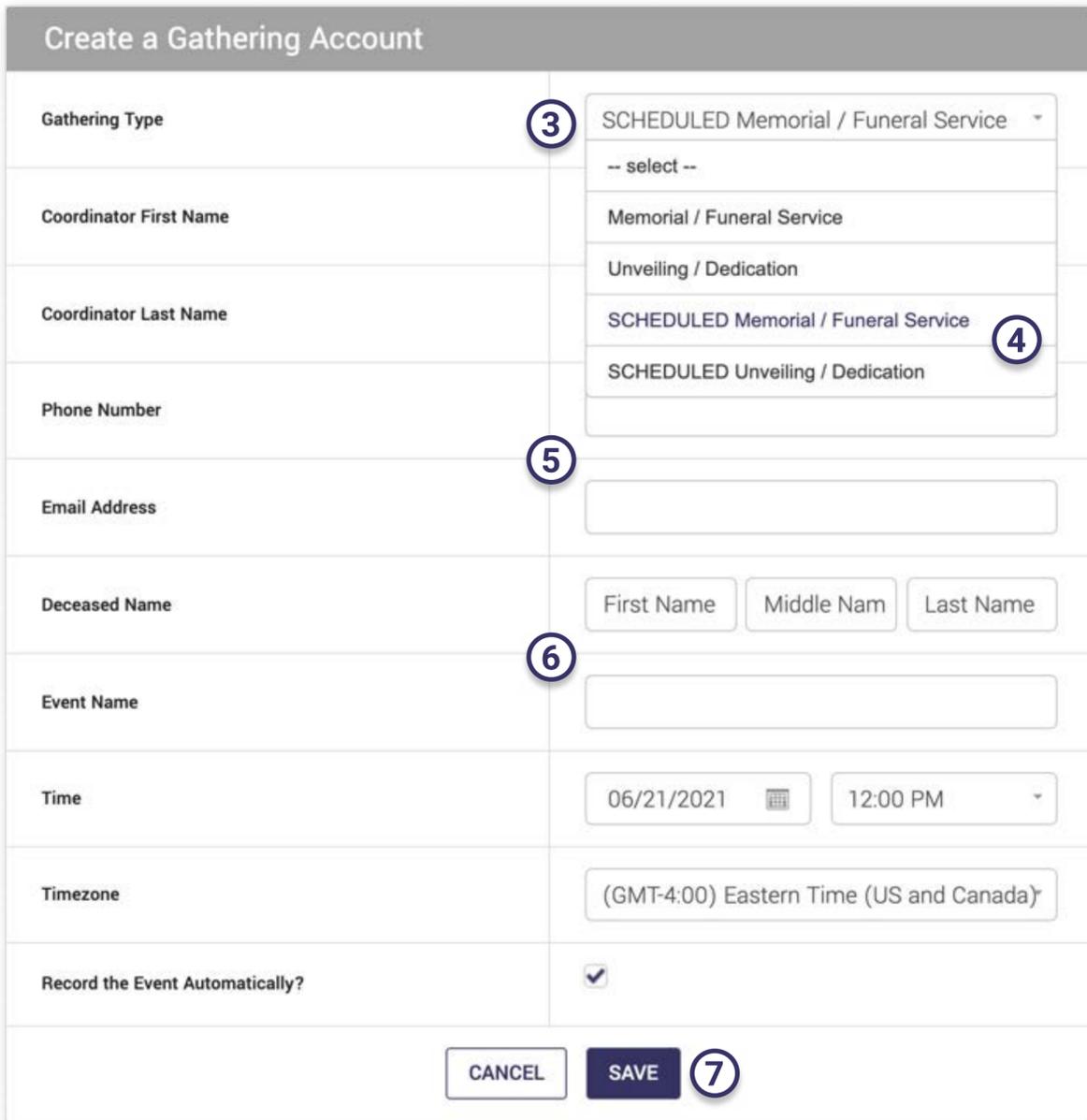
In this step, you will create a Scheduled Gathering on behalf of the family.

1. Go to the Gathering Accounts page / “Accounts” tab.
2. Select **“CREATE A GATHERING ACCOUNT”** and you will be taken to the Gathering Account Details page.
3. Select the “Gathering Type” drop-down menu.
4. Select your **SCHEDULED** Gathering Type; either “SCHEDULED Memorial/Funeral Service” or “SCHEDULED Unveiling/Dedication”. Once you make a selection, the page will expand allowing you to enter additional details.
5. Input the information of the person responsible for hosting the gathering (coordinator). This person will receive the links necessary to start and host the gathering, and the link to invite others to join.
6. Enter the following information:
 - a. Deceased Name
 - b. Event Name (what you would like to call the Gathering)
 - c. Date and Time
7. Click **“SAVE”** and a Scheduled Gathering has been created.

Once a Scheduled Gathering has been created, the person designated as the coordinator will receive a confirmation email that a virtual service or dedication gathering has been created.



The screenshot shows the top navigation bar of the eCondolence website. The title is "Gathering Accounts". Below the title are several menu items: DASHBOARD, PROFILE, VIEWNERAL, AFTERCARE, ARRANGEMENT CENTER, and FUNERAL PLANS. At the bottom of the navigation bar, there are two main sections: "ACCOUNTS" (with a circled 1) and "EMAIL SETTINGS" (with a circled 2). To the right of "EMAIL SETTINGS" is a button labeled "CREATE A GATHERING ACCOUNT" (with a circled 2).



The screenshot shows the "Create a Gathering Account" form. The form is divided into several sections. The "Gathering Type" section (with a circled 3) has a dropdown menu with "SCHEDULED Memorial / Funeral Service" selected. Below it, there are two options: "Memorial / Funeral Service" and "Unveiling / Dedication". The "SCHEDULED Memorial / Funeral Service" option is circled with a 4. The "Coordinator First Name" and "Coordinator Last Name" fields are empty. The "Phone Number" field is empty (with a circled 5). The "Email Address" field is empty. The "Deceased Name" section (with a circled 6) has three input fields: "First Name", "Middle Nam", and "Last Name". The "Event Name" field is empty. The "Time" section has a date field with "06/21/2021" and a time field with "12:00 PM". The "Timezone" field is set to "(GMT-4:00) Eastern Time (US and Canada)". The "Record the Event Automatically?" checkbox is checked. At the bottom of the form, there are two buttons: "CANCEL" and "SAVE" (with a circled 7).

What Will the Coordinator Receive?

Confirmation Email

Once a Scheduled Gathering has been created, the person designated to be the coordinator will receive a confirmation email that a virtual service or dedication gathering has been created.

Virtual Gathering Links Email

The coordinator will receive another email with instructions on how to start and host the virtual gathering. This email will also include an invitation link that can be distributed to family and friends that would like to attend virtually.

- **If the service is within the next 5 days**, the coordinator will receive an email containing the host and join links shortly after the confirmation email.
- **If the service is more than 5 days away**, the email containing the host and join links will be sent 5 days prior to the service.

NOTE: If you have included an email address from your funeral home to be copied or blind copied on emails (see page 2 of this guide), you will receive a copy of these emails when they go out to the family.

Day of the Service

The coordinator only needs to access the email containing the “**HOST YOUR SERVICE**” button, click it, and the Virtual Gathering will start. Once the gathering has started, the guests will be able to join.

You are receiving this email because you have been designated as the individual responsible for hosting, as well as sharing the invitation link.

To start and host this service, please click the button below

Host Your Service

To invite others to join, please use this link in your invitation.

<https://viewneral.zoom.us/j/96609408559?pwd=VTQ5Zm1vR3J3eTVmUER1a3JQTjk4QT09>

Following the service, you will receive an email with a link to the recording, and a list of those who attended virtually.

Example email with the host button and invitation link.

Following the Service

At the end of the day, the coordinator will receive an email with a link to the recording of their Virtual Gathering as well as a list of those who attended virtually. This recording will be available to download for 30 days. The coordinator will receive another “Reminder to Download” email 5 days prior to the expiration date.

The coordinator of the Scheduled Gathering must have the Zoom app installed prior to starting the Virtual Gathering.

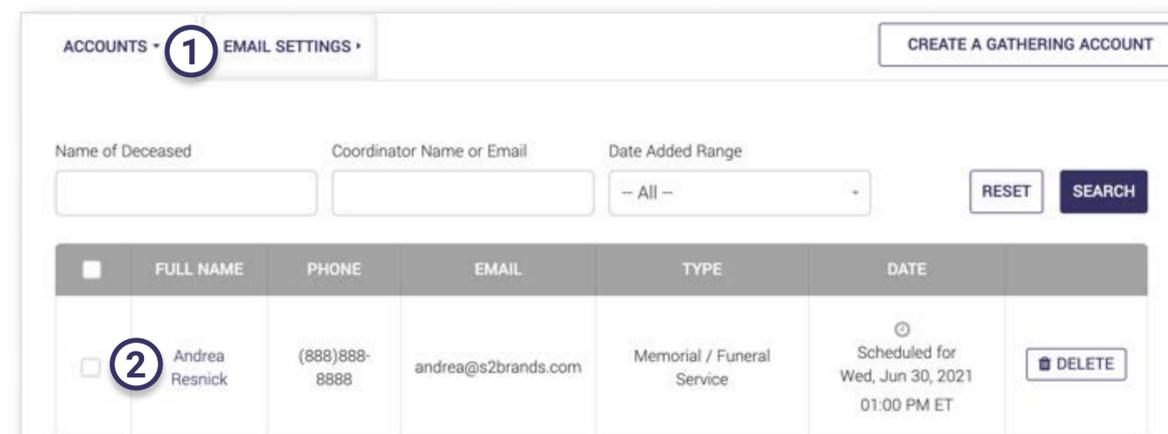
If you have any questions, please contact us at 877.362.3266.

What if the Family Wants to Reschedule Their Gathering?

If the family needs to change the date of the service you can easily make changes in the Gathering Account Details.

1. Return to the Gathering Accounts page and “Accounts” tab
2. Click on the hyperlinked name of the Coordinator. This will take you to the Gathering Account Details page.
3. Go to the DATE and TIME of the gathering and make the necessary changes.
4. Select the **“UPDATE”** button.

The coordinator will receive an email that their service or dedication gathering has been rescheduled. Your funeral home will also receive a copy of if you have included a “CC” or “BCC” email address in Email Settings (see page 2 of this guide).

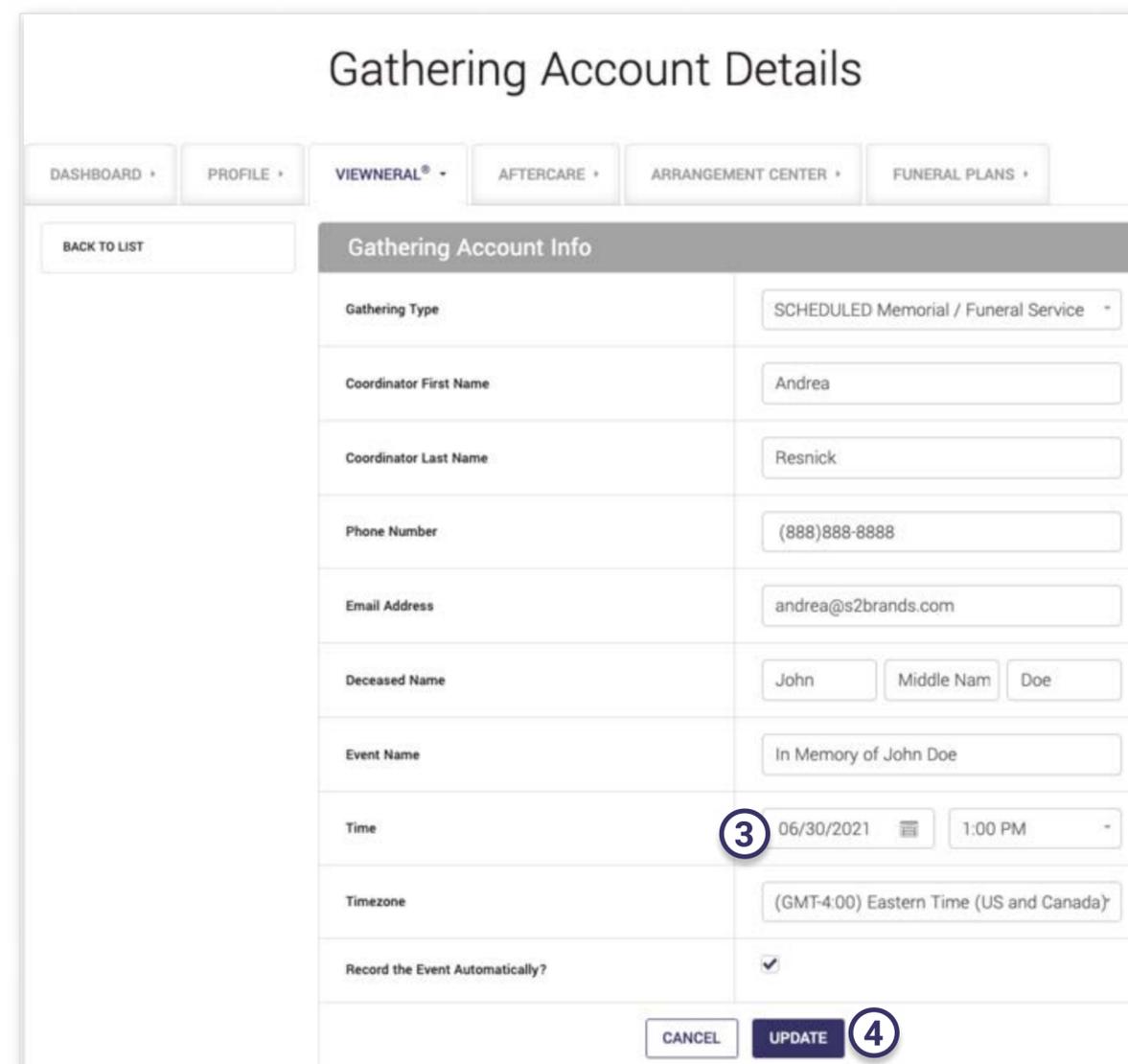


ACCOUNTS - **1** EMAIL SETTINGS - CREATE A GATHERING ACCOUNT

Name of Deceased: Coordinator Name or Email: Date Added Range: -- All --

RESET SEARCH

<input type="checkbox"/>	FULL NAME	PHONE	EMAIL	TYPE	DATE	
<input type="checkbox"/>	2 Andrea Resnick	(888)888-8888	andrea@s2brands.com	Memorial / Funeral Service	Scheduled for Wed, Jun 30, 2021 01:00 PM ET	DELETE



Gathering Account Details

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

BACK TO LIST

Gathering Account Info

Gathering Type	SCHEDULED Memorial / Funeral Service
Coordinator First Name	Andrea
Coordinator Last Name	Resnick
Phone Number	(888)888-8888
Email Address	andrea@s2brands.com
Deceased Name	John Middle Nam Doe
Event Name	In Memory of John Doe
Time	3 06/30/2021 1:00 PM
Timezone	(GMT-4:00) Eastern Time (US and Canada)
Record the Event Automatically?	<input checked="" type="checkbox"/>

CANCEL **UPDATE** **4**