



Osiris Software

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Family Collaboration

Family Initiated Cases



Osiris *Family Initiation*

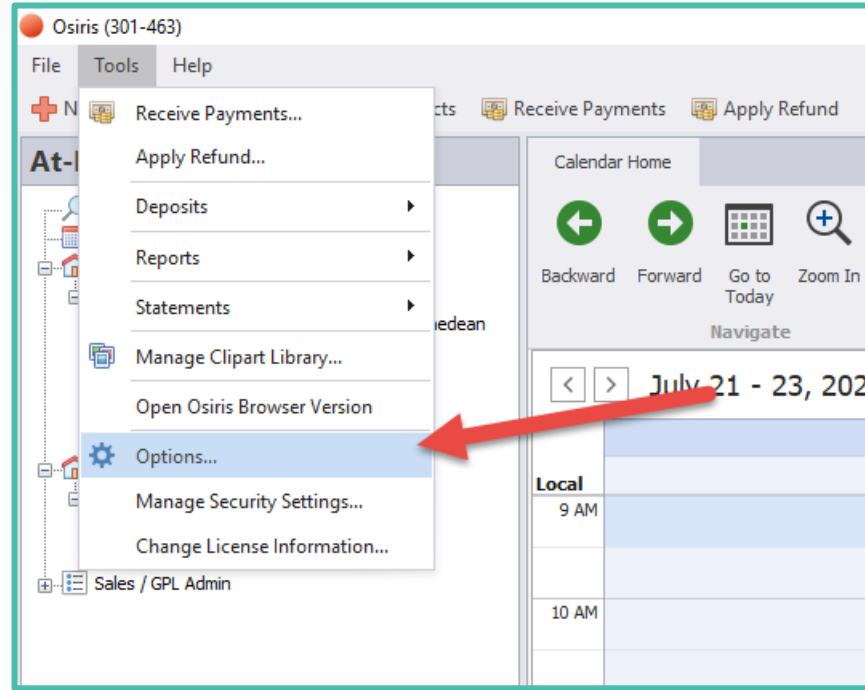
- ▶ This feature enables potential clients to create an At-Need, Preneed, or Direct Cremation case using the Family Collaboration Portal in Osiris
- ▶ Through a generated link that can be put on the business' website families will fill out a form collecting basic information about the informant. Then the informant will be sent a verification email with a link to the family collaboration portal. Upon successful email verification a case will appear in the Osiris application and the family is able to start putting information in the case through the normal collaboration portal process.
- ▶ Several verification techniques have been put in place to reduce spam content from entering the Osiris account
- ▶ A special new case category has also been added to help easily identify family initiated cases
- ▶ Additional enhancements will come in future releases



Let's Get Started!

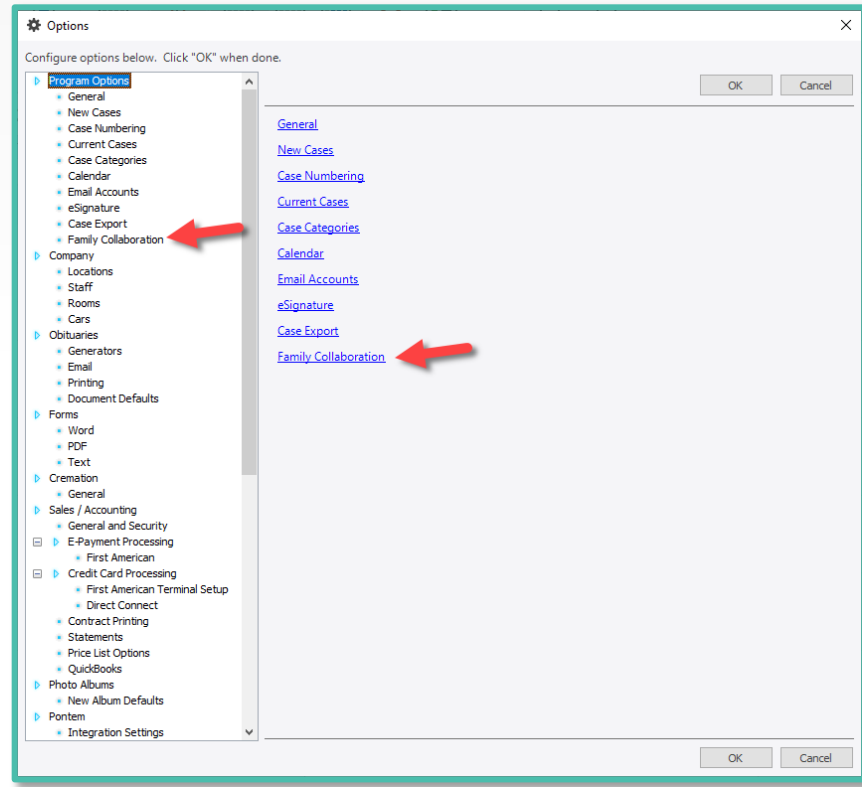
To do:

1. From the Osiris Core Application navigate to Tools > Options...



Family Initiation

2. Under Program Options choose Family Collaboration



Family Initiation Customization

3. Here you will have the ability to customize specific part of the initiation collaboration portal. We currently allow for customization of:

- ▶ Default collaboration invitation message
- ▶ The body of the email for the verification email that is sent
- ▶ The Welcome & Thank You pages

Options

Configure options below. Click "OK" when done.

Family Collaboration (Osiris Air) [OK] [Cancel]

Family Collaboration Feature is Enabled

Default Collaboration Invitation Message
Specify a default email body for invitations sent to family collaborators.
Click begin to access important information about funeral arrangements.

Family Initiation
Generate link for: Full At-Need Arrange... at ABC Funeral Home [Pe... [Copy Link](#)

[Customize Welcome page](#) [Customize Thank You page](#)
Specify an email body for welcome/verification emails sent to families initiating cases.
Thank you for verifying your email address. Click begin to continue entering your arrangement information.

Logos
Set the Logo you wish to appear for each Location (optional).

Location	
ABC Funeral Home [Pet Location]	Change Logo Remove Logo
Alexander Smith Funeral Home (Los Angeles)	Change Logo Remove Logo
Alexander Smith Funeral Home (Seattle)	Assign Logo
Gates to Heaven Funeral Home	Assign Logo

Arrangement Types
An *Arrangement Type* defines questions and things your Family will see. Customize content seen by your Families for each Arrangement Type below.

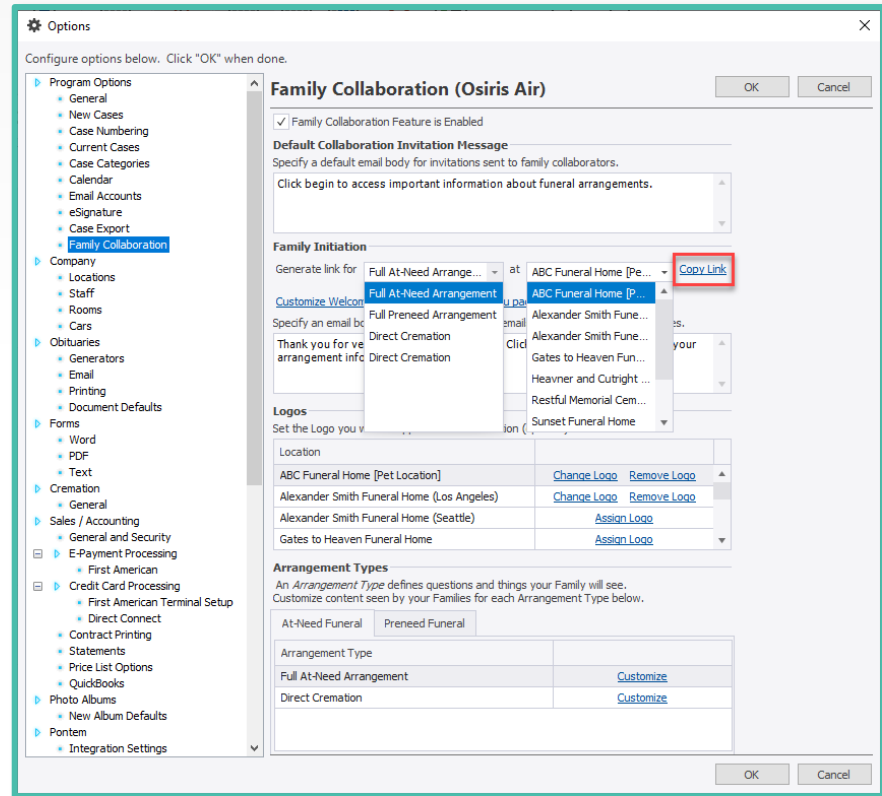
At-Need Funeral | Preneed Funeral

Arrangement Type	
Full At-Need Arrangement	Customize
Direct Cremation	Customize

[OK] [Cancel]


Family Initiation

4. When you are ready to implement Family Initiation you will need to generate a collaboration link. To do this choose the arrangement type and location then click *Copy Link*
 - ▶ Once the link is copied it can be put on your business website for families to easily access. You will most likely need to contact your website provider for assistance in this and provide them with the link(s).



Family Initiation

5. After set up is complete your families can click on these links to initiate cases.
- ▶ This is an example of the welcome page for a Full At-Need

=====

=====
Welcome to the Family Collaboration Center for
Test Funeral Home

Please submit this form to get started with your Full At-Need Arrangement. Once submitted, you will receive an email to validate your address. It will also provide a link to continue entering your arrangement information. Most importantly, know we are here for you at any point in the process. If you have any questions, please contact us at (972) 216-2700.

My name

First Middle Last Suffix

Contact information

(888) 555-1234 me@example.net


I prefer to be contacted via Phone Email

Name or the person you are making arrangements for

First Middle Last Suffix Prefix

This person is my... Gender

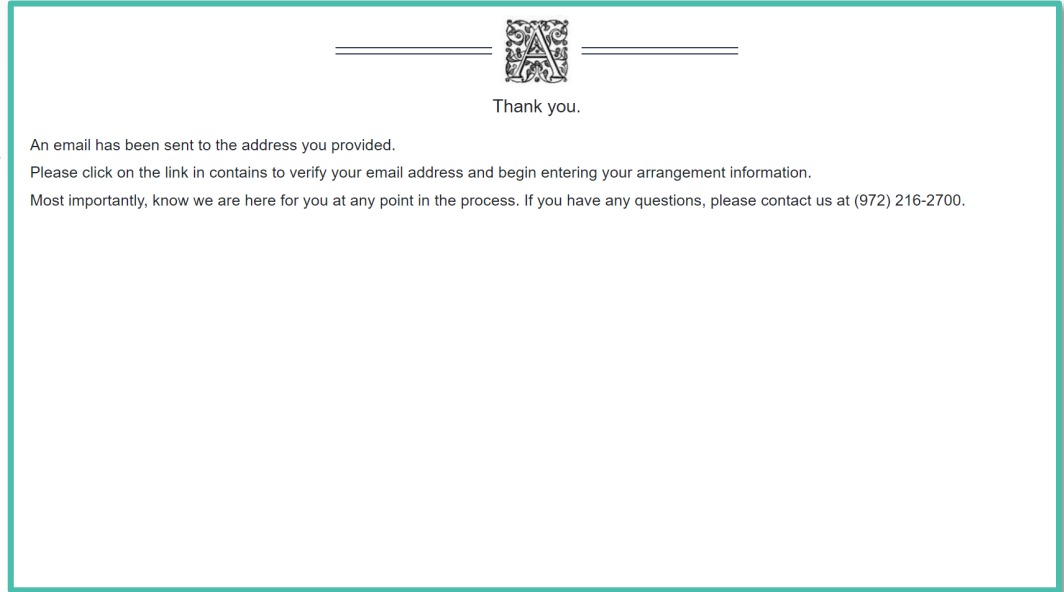
Please select... Please select...

I'm not a robot 

Submit

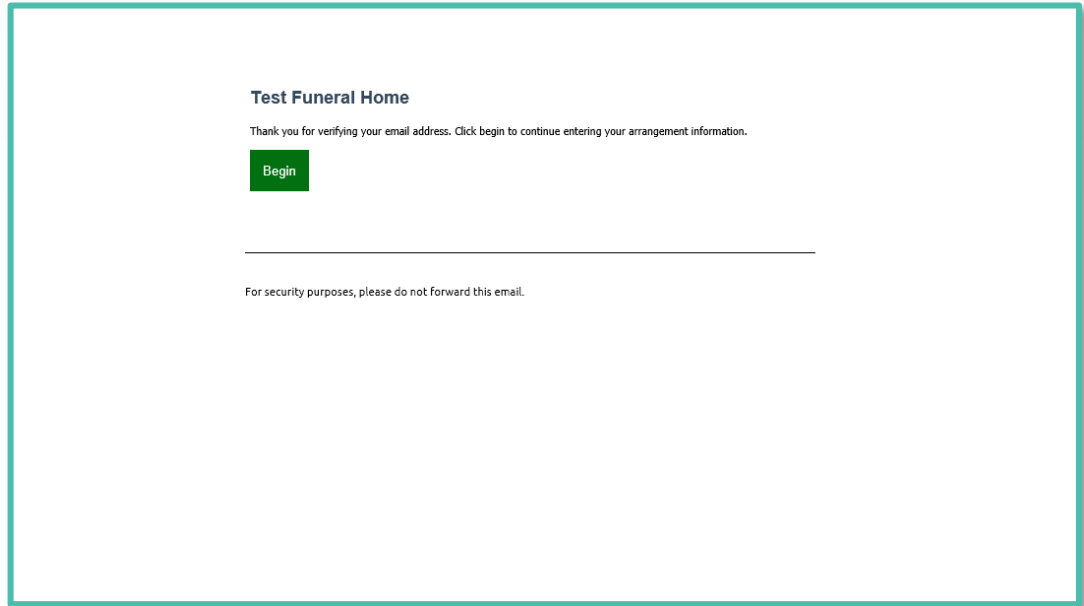
Family Initiation

6. When the initial information has been filled out and the users humanity is verified they will be directed to the thank you page



Family Initiation

7. The family member will then receive this email in their inbox to continue the collaboration process
- ▶ Once the *begin* button is clicked is when the case will show up in Osiris



Family Initiation

- ▶ We are working to develop an email notification that will be sent when a family initiated case is added and that will come soon
- ▶ If you are unfamiliar with the Family Collaboration Portal in Osiris click [here](#) to learn more
- ▶ See this [How-to video](#) for customizing the arrangement portal



Need Help?



Customer First

We Work For You

WE WORK FOR YOU



Passion

We Love What We Do

WE LOVE WHAT WE DO



Integrity

You Can Count On Us

YOU CAN COUNT ON US



Excellence

Because Only The Best Will Do

BECAUSE ONLY THE BEST WILL DO

Our knowledgeable support team is always available to assist you with any needs for Osiris Software you may have!

Contact Osiris Support

Monday-Friday from 8:30AM to 6:00PM CST

(877) 267-4747, Option #2

Weekend / Email Support

✉ Support@OsirisSoftware.com