

## SNA Masonry Management – Removals System

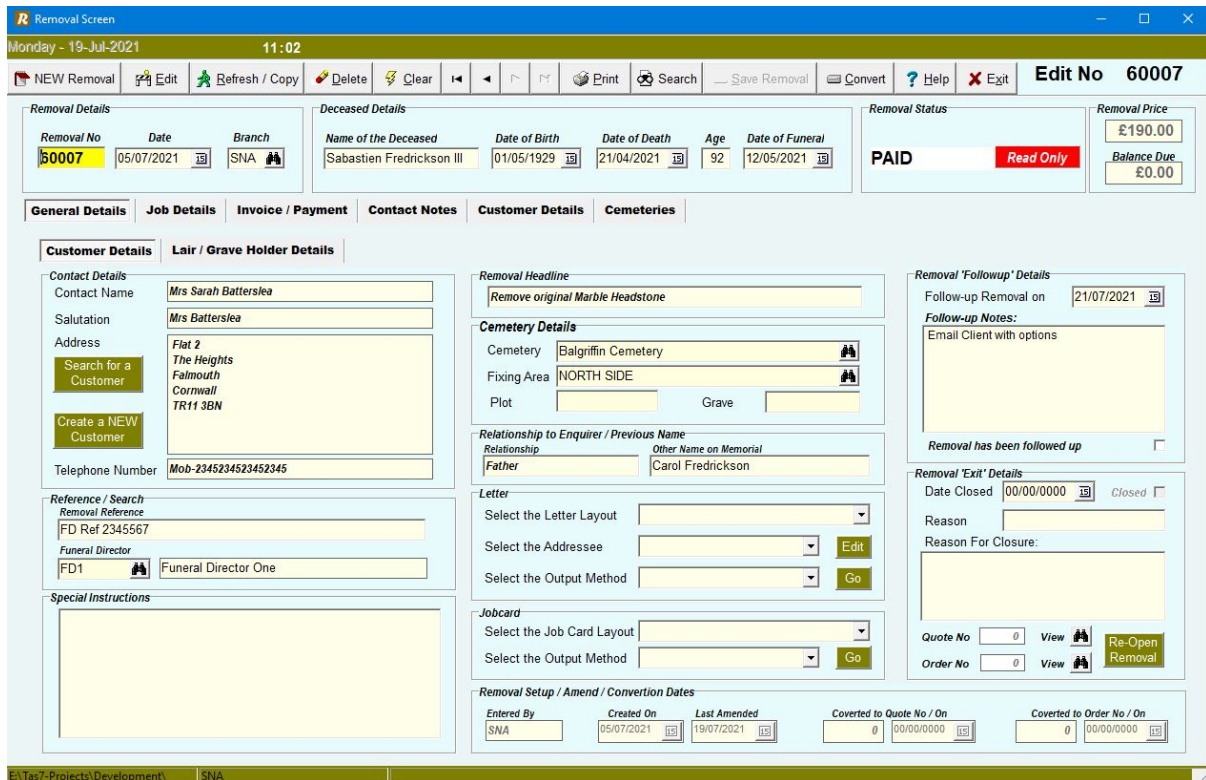
Removals are always a bit of a challenge for a Memorial Business, illustrated by the quantity of old memorials lying around in masonry yards all over the country.

SNA have now created a valuable addition to our standard system which is dedicated to managing removals from the initial customer or funeral director request, until the renovation and additional inscription of the memorial or even its replacement with a new stone.

The system is available in two modes, the basic removal system and full removal system with estimating and scheduling.

This document details both, for your information.

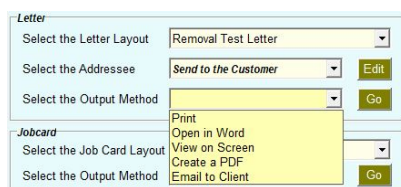
### The Basic Removal System



The system is broken down into different 'Tabs' as follows: -

**General Details** – You can enter all the basic details you need to record on a removal such as ...

- **Deceased details** - Date of Birth / Death – (System calculates age) and funeral date.
- **Customer details** – Full contact information
- **Funeral Director Details** – Who referred you to the removal.
- **Cemetery Details** – Links to your existing SNA cemetery database.
- **Follow-up required** – Document any follow-up action to take place.



The removal system can be used to select predetermined letters to send to the customer.

You can also design your own job cards and print them from here.

Removal Screen  
Monday - 19-Jul-2021 11:04

NEW Removal Edit Refresh / Copy Delete Clear Print Search Save Removal Convert Help Exit Edit No 60007

<b>Removal Details</b> Removal No: 60007 Date: 05/07/2021 Branch: SNA			<b>Deceased Details</b> Name of the Deceased: Sabastien Fredrickson III Date of Birth: 01/05/1929 Date of Death: 21/04/2021 Age: 92 Date of Funeral: 12/05/2021				<b>Removal Status</b> PAID <span style="color: red;">Read Only</span>		<b>Removal Price</b> £190.00 Balance Due: £0.00	
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General Details Job Details Invoice / Payment Contact Notes Customer Details Cemeteries

**Removal Report**

Visit the cemetery. Remove the stone and return to the location below

**Existing Inscription on Memorial (Tab to Count)**

Our Family Chain Is Broken  
Nothing Seems The Same  
But As God Calls Us One By One  
The Links Shall Join Again

**Details of Trinkets Removed**

A glass vase (green) and a small box containing coins

**Removed Person / Crew**

Code: C1  
Fixing Crew: Crew One  
Date removal took place: 00/00/0000

**Storage Location**

Code: LOC1  
Location Details: Location One

**Removal Price**


Nett Price	V/C	VAT Des	VAT	Gross
£190.00	2	Zero Rated	£0.00	£190.00

**New Inscription on Memorial (Tab to Count)**

Wonderful Was Your Love For Us  
Remembered Always  
Loving Memories Last Forever  
Remembering A Tiny Angel  
Precious Memories Left Behind  
Till We Meet Again

**Photo One**

The Stone to be removed



File Location: E:\Tas7-Projects\Development\Photos\GS2.jpg

**Photo Two**

File Location

E:\Tas7-Projects\Development\ SNA

**Job Details (Basic System)** – It is here that you setup the details of the work to be carried out to carry out the removal. You have the following sections available to you: -

- **Removal Report** – Write up what needs doing.
- **Removal Crew** – Link this job to an individual or crew.
- **Location of Memorial** – Where the recovered job is stored.
- **Price to Be charged** – Enter price that applies to the removal (if applicable)
- **Existing Inscription** – Enter the Existing Inscription
- **New Inscription** – Enter the New Inscription (if relevant)
- **Trinkets** – Enter any details of trinkets removed.
- **Photos** – You can enter up to two pictures with headlines.

Removal Screen  
Monday - 19-Jul-2021 11:05

NEW Removal Edit Refresh / Copy Delete Clear Print Search Save Removal Convert Help Exit Edit No 60007

<b>Removal Details</b> Removal No: 60007 Date: 05/07/2021 Branch: SNA			<b>Deceased Details</b> Name of the Deceased: Sabastien Fredrickson III Date of Birth: 01/05/1929 Date of Death: 21/04/2021 Age: 92 Date of Funeral: 12/05/2021				<b>Removal Status</b> PAID <span style="color: red;">Read Only</span>		<b>Removal Price</b> £190.00 Balance Due: £0.00	
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General Details Job Details Invoice / Payment Contact Notes Customer Details Cemeteries

Payments Invoices

**Print an Invoice**

New Invoice Abort Entry

Date of the Invoice: 00/00/0000

Invoice to...  
Account No: Flat 2, The Heights, Falmouth, Cornwall, TR11 3BN

Invoice Type: [Dropdown]

Layout: Edit [Dropdown]

Output Type: [Dropdown]

Ok to Update the Ledgers Update Ledger

**Account Listing**

Date	Time	Type	Inv No	Details	Debit	Credit
19/07/2021	07:32	PAY	0	Deposit Paid by Debit Card		190.00
19/07/2021	11:00	INV	400253	Invoice to Mr Norman Batterslea	190.00	

Balance: £0.00    Debit: 190    Credit: £190.00

E:\Tas7-Projects\Development\ SNA

**Invoices / Payments (Both Systems)** – You can post payments (printing receipts) and print and post invoices in this section. If these payments and invoices are dealt with in a separate accounts program, you can simply mark them as paid and invoiced.

You can instantly see all payments made and invoices raised.

The screenshot shows the 'Removal Screen' software interface. At the top, it displays 'Monday - 19-Jul-2021' and '11:07'. The main menu includes options like 'NEW Removal', 'Edit', 'Refresh / Copy', 'Delete', 'Clear', 'Print', 'Search', 'Save Removal', 'Convert', 'Help', and 'Exit'. The 'Edit No' is 60007.

**Removal Details:** Removal No: 60007, Date: 05/07/2021, Branch: SNA.

**Deceased Details:** Name of the Deceased: Sabastien Fredrickson III, Date of Birth: 01/05/1929, Date of Death: 21/04/2021, Age: 92, Date of Funeral: 12/05/2021.

**Removal Status:** PAID (Read Only). **Removal Price:** £190.00. **Balance Due:** £0.00.

**General Details | Job Details | Invoice / Payment | Contact Notes | Customer Details | Cemeteries**

**Post Contact Details:** Contact made on 16/07/2021 at 11.41. Contact made by SNA. Contact Type: Phone Conversation. Contact With: The Client. Conversation: Discussed the removal and offered services to renovate it.

**List of Conversations:**

Date	Time	Type	Spoke to	Conversation
16/07/2021	11.41	Phone Conversation	The Client	Discussed the removal and offered services to renovate it

**Follow-up Details (if required):** Follow-up Required (Tick if Yes) . Followup on 00/00/0000 at 00:00. Follow-up: [Text Field]. **Mark Follow-up as Completed**

**New / Save / Delete / Print or Email Contact Details**

**Contact Details (Both Systems)** – You can record details of all conversations and documentation sent to, or received from customers. You can view and access any of the conversations on the list.

The screenshot shows the 'Removal Screen' software interface with the 'Customer Details' tab selected. It displays the same removal details as the previous screenshot.

**Customer Details (Click to Edit Lair Holder):** Title: Mrs, Initials: S, First Name: Sarah, Surname: BATTERSLEA. Salutation (Letters): Mrs Batterslea.

**Company:** Company: [Text Field], Web: [Text Field]

**Contact Address:** Flat 2, The Heights, Falmouth, Cornwall. Postcode: TR11 3BN. **Click to View on Google Maps**

**Bill To Details:** Contact Name: Mr Norman Batterslea, Salutation: Norman, Company Name: [Text Field], Flat 2, The Heights, Falmouth, Cornwall. Postcode: TR11 3BN. Account Number: [Text Field]. **Click to View on Google Maps**

**Contact Details:** Home: 324523452345, Work: 234523452345, Mobile: 2345234523452345, Customer Happy to receive Text Messages?  (Text Button will not activate unless ticked), FAX: 234523452345, Email: simon@snet.co.uk, Bill to Email: [Text Field]

**Notes (Client does not see):** Fussy old person, Nice poodle

**History:** Date Setup: 16/10/2018, Date of Last Quote: 00/00/0000, No Quotes: 0, Date of Last Order: 00/00/0000, No Orders: 0

**Save:** Ok to SAVE this customer, Save Customer

**Customer Details** – You can access and amend the customer details.

The customer details page is the same as our main system allowing you to create new customers or edit existing ones.



**Cemetery Details** - You can access and amend the cemetery details.

Access to the central cemetery database is available in this module in the same way that it is in the other modules.

### Removals With Estimating

There is an upgrade available on the removals system which offers the ability to create an estimate for the customer. It has been proved by Masons currently doing this that their conversion rate can be increased to over 90%!

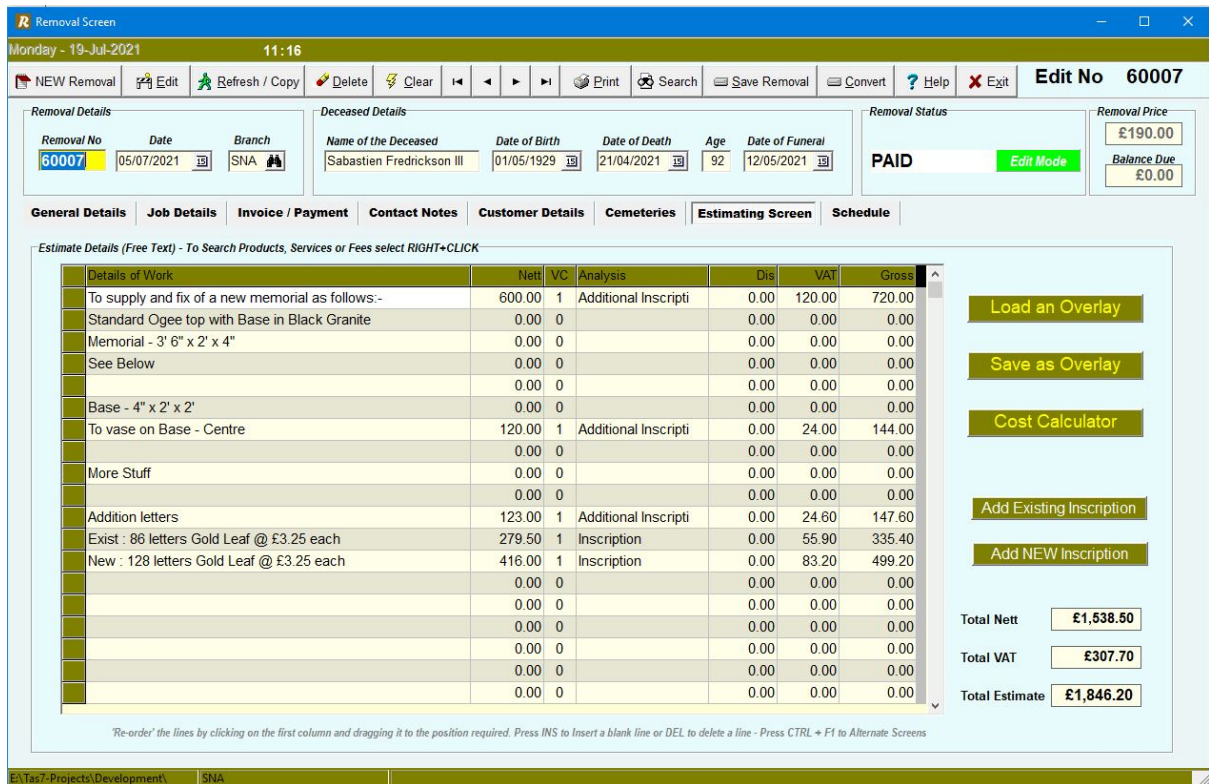
It has the following additional TABS

### The Job Details screen

You will have the ability to count both the existing and new inscriptions and then select a lettering type and apply a cost per letter.

The benefit of keeping this separate is that you can make one charge for the letter renovation costs and another for any additional lettering that your customer may require.

You will note on the estimating screen that you can pull these costs with details into an estimate.



**The Estimating Tab** – This is a ‘free form’ screen where you can create estimates for your customer. It offers the following features: -

- **Access to Services** – By right clicking you can access all the various service charges available to you in the main system. You can also apply Fee estimates here too.
- **Load an Overlay** – You can access the Overlay database which containing a list of the standard jobs that you have setup. This can save a lot of typing.
- **Cost Calculator** – You can bring in a memorial cost using the cost calculator.
- **Add Existing Inscription** – You can import the cost of the existing inscription here.
- **Add a New Inscription** – You can import the cost of the new inscription here.

Using this screen, you can build up a complete estimate of the job. Costs can be applied to any of the lines to give a complete picture.

You can create a document with this estimate on it to post or email to your customer.

This could be done as an attachment to the original letter, or more likely as an additional page in the invoice.

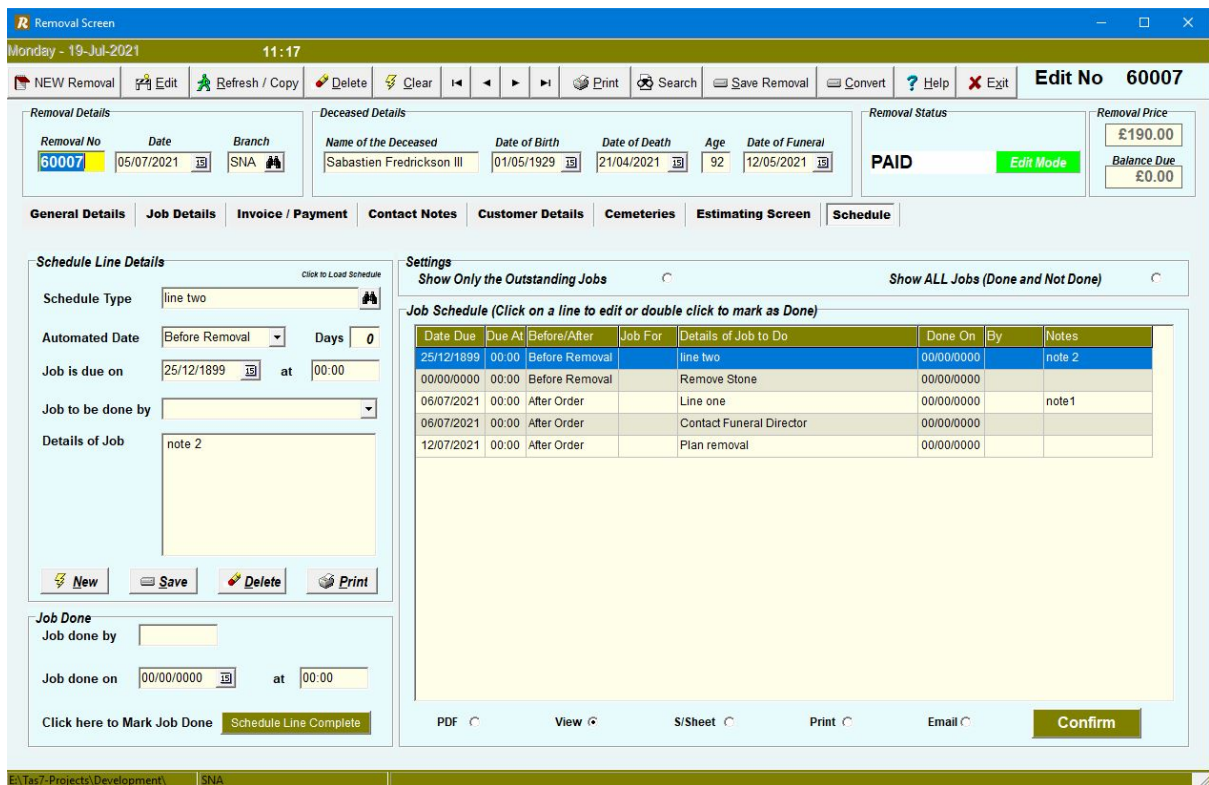
This will ensure that on day one, on receipt of your invoice, the customer will immediately have an idea of what you can offer and thus are less likely to be tempted to go elsewhere.

This procedure has proved highly successful with the Masons who have adopted the principle.

This screen will make the whole process simpler and more streamlined. The system holds records of what document you have sent. The Estimate can then be converted to a quote or order at any time.

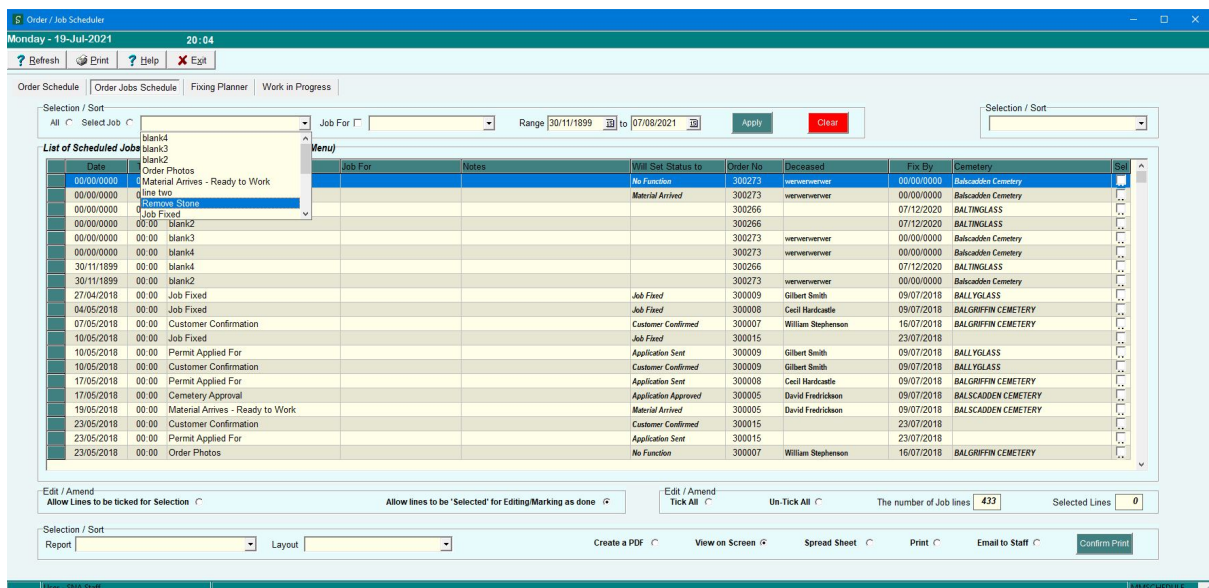


**Conversion** – You can convert the estimate to a quote or an order. All relevant details will be transferred.



**The Schedule** – This allows you to schedule individual jobs that need to be carried out.

The system scheduler is broken down into two areas. Schedules for Orders and Schedules for Removals. The master schedules are setup separately, but both will appear together on the System Scheduler so that you can plan your work.



## Summary

The SNA Masonry Management Removal system will be a real asset to your business. Not only will it take away the time-consuming aspect of managing all those removals, but it will help to ensure that instead of lying around the yard, blocking valuable space, they could be turned into potential orders for renovations, additional inscriptions, or even new stones.

For further details please email [simon@snet.co.uk](mailto:simon@snet.co.uk), or call 07977431128.

Check out our website for details on the main products – [www.snet.co.uk](http://www.snet.co.uk)