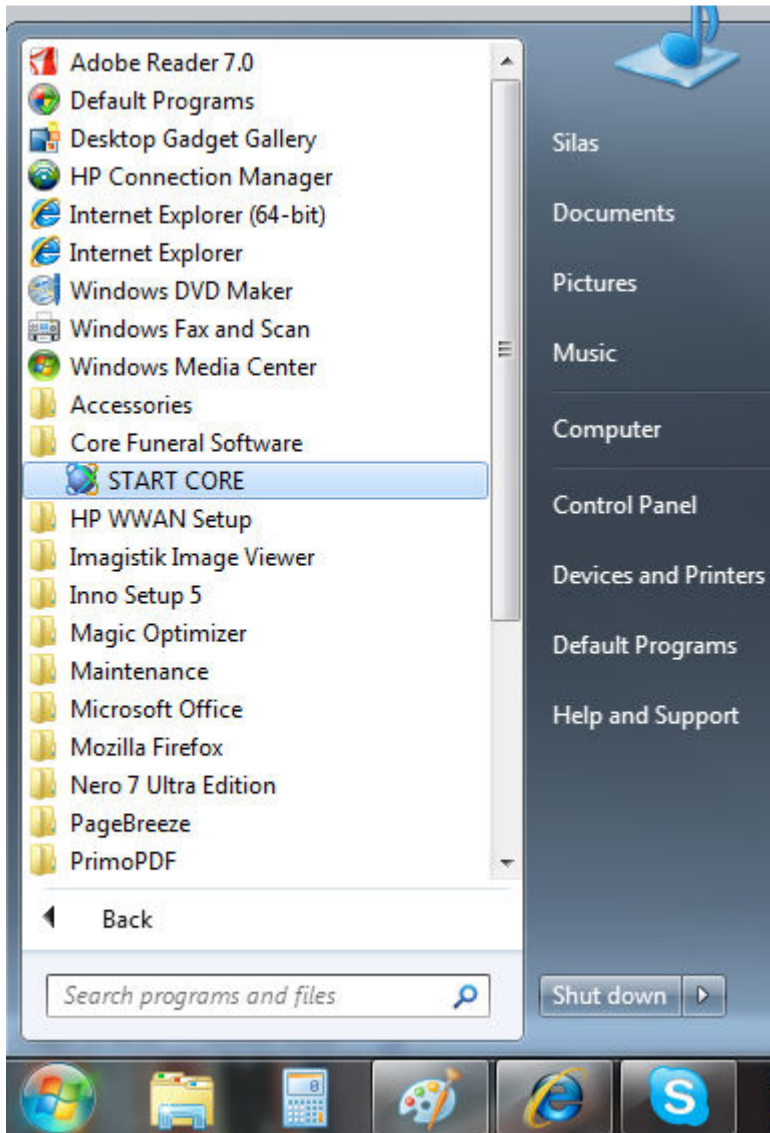


Core User Manual

This guide will show you how to manage a policy and how to accept payments for a policy

Starting Core

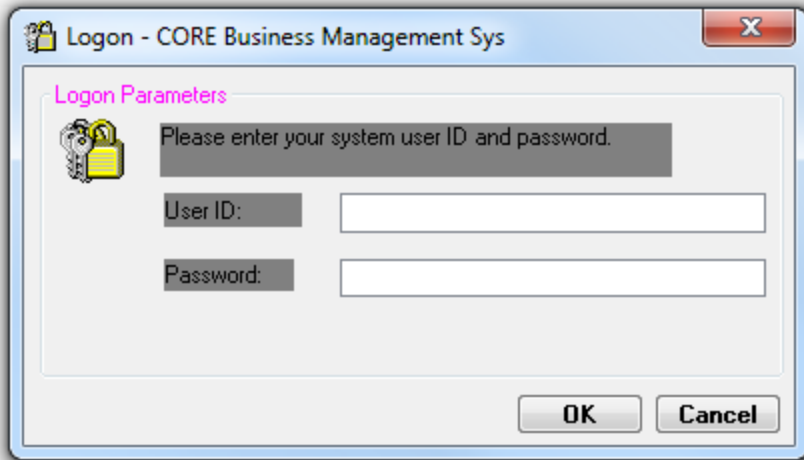


- Click on the Windows Start Button,
- Click ALL Programs,
- Click Core Funeral Software,
- Click START CORE

Login

CORE has 2 login screens

Login ONE



User ID

Type the word CORE and press ENTER

Password

Type the word CORE and Press ENTER

Login TWO



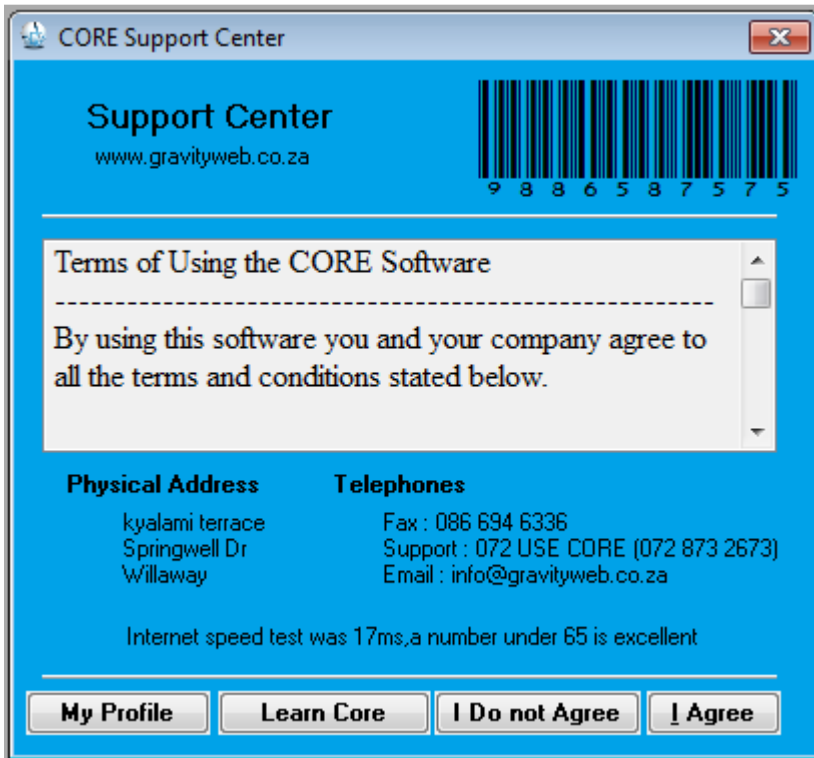
User Name

Type your Allocated USER NAME and press TAB on your keyboard

Password

Type your Allocated PASSWORD and Click Login Button

CORE Support Center Screen



This screen shows you the Terms and Conditions and the user agreement

Terms of using CORE explain the basic agreement between your company and Boitumelo Corporate IT and the expectation of confidentiality, support and assistance between our company and your company as a user of the CORE Funeral Software

This screen shows you our contact details

The screen also shows you the Internet speed test at the bottom

If your speed test is over or close to 65 milliseconds, then you must expect your CORE to respond a little bit slower because your internet connection is not very fast

Click **I Agree** button to continue to the CORE Main Menu



The top part of the menu has some important details about your CORE.

- It shows your Company Name,
- Your License Type ,
- The Date your 30 day License will expire
- And it Shows the Version of CORE that you are using

The CORE Main Menu screen has 20 buttons you can use.

If a button is NOT active e.g. like the Future Use Button



Then you do not have access to use it, your admin will have to give you a right to use it, thereafter close and open CORE again to check if the Button you want to use is now active.

You can use your mouse to move and click on any button on the screen



[Add Member]

Use this button to add a new policy to your system

[Modify Member]

Use this button to edit the details of a policy that is already in the system

[Do Payment]

Use this button to accept a Policy Payment, Society Payment, Petty Cash or Invoice Payment

[Activate Suspend]

Use this Button to Activate a Policy or to Suspend a Policy

[Member Claim]

Use this Button to start a Policy Claim

[Debit Order / Persal]

Use this Button to do Debit Order and Persal Processing

[Daily Bank]

Use this Button to do your Daily Cash-Up

[Reports]

Use this Button to open a list of Possible Reports that you can process

CORE Main Menu Part 3

[Core Chat]

Use this button to open the chat screen and chat with your colleagues at all branches

[View Our Plans]

Use this button to SEE or to edit the Plan/Schemes information

[Setup Menu]

Use this button to go to the setup menu and edit information like branches, company details, users and other settings

[Societies Manager]

Use this button to Add/Modify and Manage societies and Group Schemes

[Sales Manager]

Use this button to do Invoices, Quotes, and Lay-byes and to manage Stock

[Funeral Manager]

Use this button to funerals

[Exports Manager]

Use this button to export data for your underwriter and accountant or for your statistics

[Fleet Manager]

Use this button to manage your fleet and monitor each vehicle

[HR Manager]

Use this button to manage your employees, Leave, Payroll and Attendance

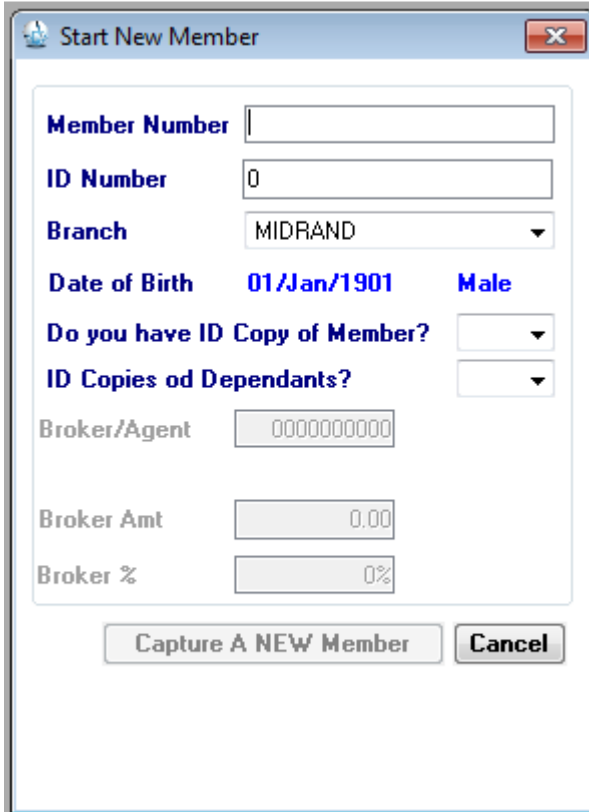
Note

If any button that you want to use is not active, communicate with your Admin and ask them to give you permissions to use that button.

Your Notes

Add New Member

Click on Add Member Button, the Start New Member Screen will open as below



Start New Member

Member Number

ID Number

Branch

Date of Birth Male

Do you have ID Copy of Member?

ID Copies of Dependents?

Broker/Agent

Broker Amt

Broker %

Member Number

Type the new member number and press TAB

ID Number

Type the 13 digit ID Number

Branch

Select the Branch where this member applied

Date of Birth

Check that the Date of birth is correct and matches the ID Number

Do you have ID Copy of Member?

Choose yes if you have a copy of the ID of the member

ID Copies of All Dependents?

Choose yes if you have all the copies of the children, spouse and extended family and then press TAB

[Capture A NEW Member]

Click this button if all the information on screen is Correct

This button only works if the Member number is typed in and the ID Number is Correct and the details are not duplicates

Add New Member – Continued

Join Date: 26/06/2010 Member No.: ABC123 Branch: MIDRAND

Member	Spouse	Children	Extended	Banking	Agents	Beneficiaries	Remarks
Plan One							
Plan Two							
Plan Three							
Payment By	1 Cash						
ID Number	8409095847086		Date Birth	09/09/1984			
Persal No	0		Passport				
Surname							
First Name							
Title	Mr		Single				
Street							
Suburb	MIDRAND						
City	WILLAWAY						
Postal line 1							
Postal Line 2							
Postal Line 3						Post Code	
Cellular			Work Tel				
Email							
Communication	Sms						

Save and Calculate Policy

Join Date

Type the Join/Inception Date (Day/Month/Year) then press TAB

Member Number

Press TAB

Branch

Select The Branch the Member has applied at then press TAB

Plan One

Select the Plan Option for this Member and then press TAB

Plan Two

Select the Add-On Plan if the member has chosen an add-on plan then press TAB

Payment By

Select the payment Method and then press TAB

Date of Birth

Press TAB

Persal No

Type in the Persal Number or leave as empty then Press Tab

Surname

Type the Member Surname and then press TAB

First Name

Type the Member Name and press Tab

Title

Choose the Member Title and then press TAB

Marital status

Choose the Marital Status and then press TAB

Street

Type the Street name and number and then press TAB

Suburb

Type the Suburb/Township and press TAB

City

Type the City and press TAB

NOTES

If the Residential Address is the same as the Postal Address choose YES

Type the Cellular (leave the first ZERO out), type the Work Tel, Type the Email and select the communication

Adding Spouse

If the Main Member is married, you can add the spouse details

Capture New Member Ref No : ABC123

Join Date: 26/06/2010 Member No.: ABC123 Branch: MIDRAND

Member Spouse Children Extended Banking Agents Beneficiaries Remarks

Name: []

Surname: DOMAN

ID Number: 0

Active:

Join date: 01/08/2010

Save and Calculate Policy

Name

Type the Spouse Name and then press TAB

Surname

Type the Spouse Surname and then press TAB

ID Number

Type the ID Number and then press TAB

Active

Leave as ticked and then press Tab

Join Date

Type the join/inception date

If you do not have children or Extended family to capture, you can press Save and Calculate Policy to finish

Adding Children

This screen is for capturing children under the age of 21

Join Date: 26/06/2010 Member No.: ABC123 Branch: MIDRAND

Member	Spouse	Children	Extended	Banking	Agents	Beneficiaries	Remarks	
First Name	Surname	ID Number	Age	Gender	Relation	Type	Active	InceptionDate
	DOMAN		0 90	Male		Dependent	<input checked="" type="checkbox"/>	01/08/2010

If you make a mistake and Capture a person over 21 in this section. simply change the TYPE to extended and then go to the extended Screen, the child will move to that side automatically.

Save and Calculate Policy

First Name

Type the name of the child then press TAB

Surname

Type the Surname of the child then press TAB

ID Number

Type the ID Number of the child and then press TAB

AGE

Check the age is Correct

Gender

Check the Gender is Correct

Relation

Choose whether the child is a son, daughter or cousin to the parents

Type

This is dependent, press Tab

Active

This shows that the child is still being covered by the policy, press TAB

Inception Date

Type the join date of this child

NOTES

"If you want to add another child, press the down arrow on your keyboard"

If you do not have more children or extended family to capture then press Save and Calculate Policy to finish

Adding Extended Family Member

This screen is for capturing people over the age of 21

Capture New Member Ref No : ABC123

Join Date: 26/06/2010 Member No.: ABC123 Branch: MIDRAND

Member	Spouse	Children	Extended	Banking	Agents	Beneficiaries	Remarks		
First Name	Surname	ID Number	Date Birth	Age	Type	Plan	Premium	Join Date	Active
	DOMAN	0	01/01/1901	109	Extended	BRONZE PLAN	R0	01/08/2010	<input checked="" type="checkbox"/>

If you make a mistake and Capture a Child in this section, ASK your Admin to change the TYPE of this child for you so that the child gets moved to the Children Section

Save and Calculate Policy

First Name

Type the name of the child then press TAB

Surname

Type the Surname of the child then press TAB

ID Number

Type the ID Number of the child and then press TAB

AGE

Check the age is Correct

Type

This is dependent, press Tab

Plan

Select the Plan for this Extended family member

Premium

If the premium is Zero, then the plan you have chosen does not cater for the age of your extended member. Contact your admin and ask them to see why the plan you have selected does not have a premium for the extended member age

join Date

Type the join date of this child

Active

This shows that the child is still being covered by the policy, press TAB

NOTES

"If you want to add another extended member, press the down arrow on your keyboard"

If you do not have more extended family to capture then press Save and Calculate Policy to finish

Adding Member debit order details

You can only use this screen if you selected the payment method of BDO in the member details screen

Capture New Member Ref No : ABC123

Join Date: 26/06/2010 Member No.: ABC123 Branch: MIDRAND

Member Spouse Children Extended **Banking** Agents Beneficiaries Remarks

Bank Code: STANDARD BANK S.A.

Bank Branch: ALIWAL NORTH

Account Type: 2 Savings

Account No: Account Holder: DOMAN TELO

Debit Order Day: ↓

Effective Date: 01/01/1901

Internal Ref No.:

Save and Calculate Policy

Bank Code

Select the bank for this member

Bank Branch

Select the Bank Branch for this member

Account Type

Select the Account type for this member

Account No

Type the valid account number for this member

Account Holder

Type the Account holder name and surname

Debit Order Day

Choose the day that the member wants money taken from their account

Effective date

Choose the Date that the member wants the debit order to start

Internal Ref No.

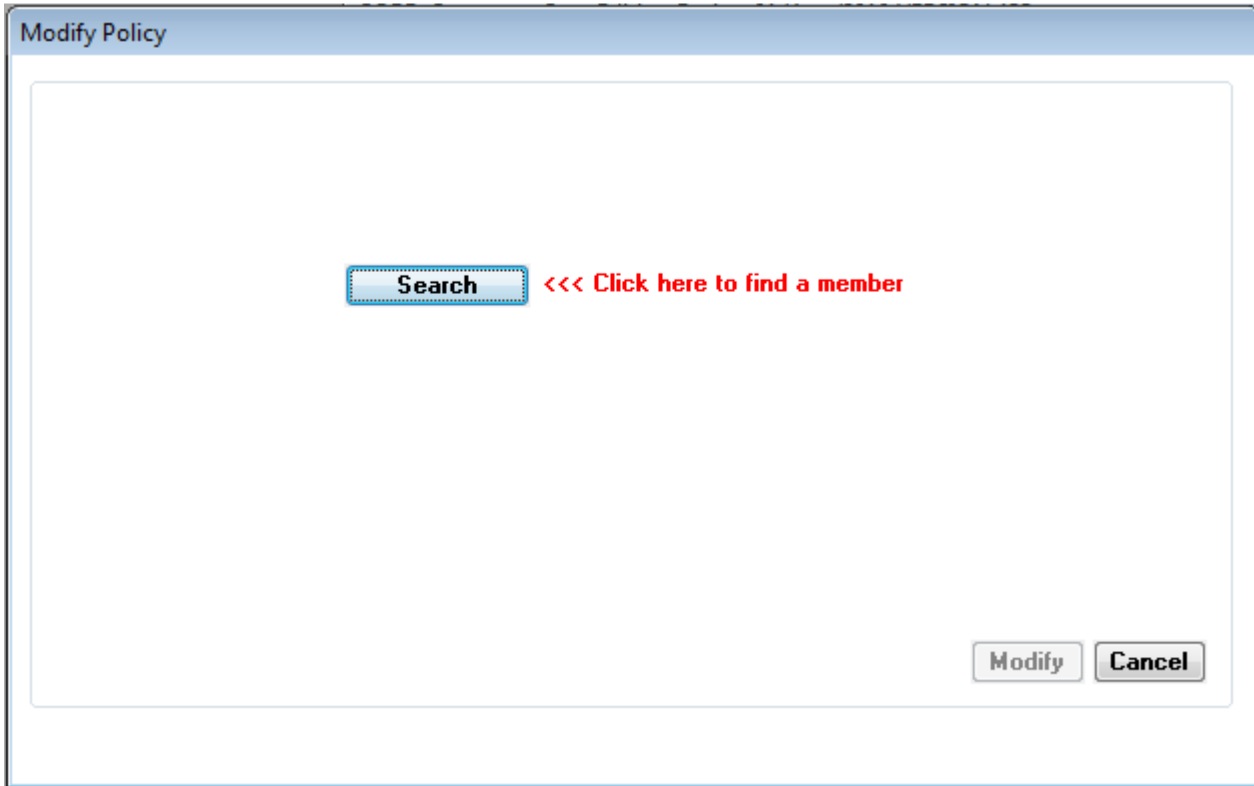
Type any specific ref number or leave blank

Press the [**Save and Calculate Policy**] Button when you are finished

Your Notes

Modify Member

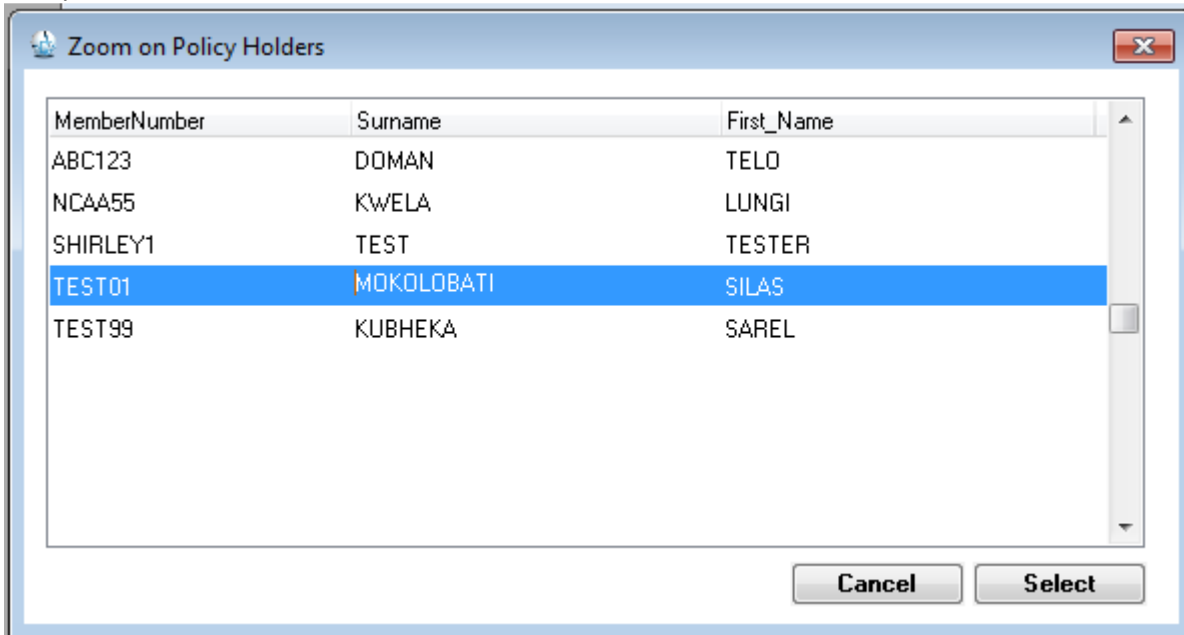
Go to the Main Menu and click Modify Member button



[Search]

Click on this button to see a list of policy holders

Policy holder list screen



Find the policy holder that you want to edit

Then press **[Select]** to select that policy.

Click on the **[Modify]** Button to enter the Modify screen

Removing Children, Spouse or Extended Family from a Policy

If the main member does not want to cover the Spouse or some children or some extended family members.

The process to follow is simple.

- Get main member to fill in the correct withdrawal form and authorize with a signature
- Go into Modify Policy
- Go into Spouse or Children or Extended member
- On the person that the member wants to withdraw, change this
 - **Active**
 - To this
 - **Active**
- Then press **[Save and Calculate Policy]** button

Core will then recalculate the premium minus the person who is now not active anymore.

Do Payment

Go to the Main Menu and click on the DO Payment Button

Payment Options

Payment Type
Select Please Policy Payment

Policies
Member List

Premium R0.00
Something Is Wrong. Please CHECK Policy

Society Details
Society

Invoice Details
Invoice No.

Do PAY **Petty Cash** **Check Policy** **Cancel**

Select Please

Select the Type of payment you want to make then press TAB

[Member List]

Click this button to see a list of policy holders,
Select your policy and then press select

Premium

If the amount is ZERO you cannot continue, you will have to click CHECK POLICY to check why the Premium is ZERO
If the Premium is not ZERO you will be able to Continue

[Do PAY]

Press this button to continue making the payment

This button only works if you have selected a member and the member is active and the member premium is not ZERO

Do Pay – Continued

The screenshot shows a window titled "Payments" with a table of payment records and summary statistics at the bottom.

Date	Time	Amount Paid	Month	year	Payment Type	remarks	Payment By
2010/05/28	18:42:21	R65.00	5 May	2010	1 Cash	No Remarks	CORE
2010/05/29	21:33:12	R65.00	5 May	2010	1 Cash	No Remarks	CORE
2010/05/31	10:37:43	R65.00	5 May	2010	1 Cash	No Remarks	CORE
2010/06/10	16:06:03	R65.00	6 Jun	2010	1 Cash	No Remarks	CORE
2010/06/11	11:53:26	R65.00	6 Jun	2010	1 Cash	No Remarks	CORE
2010/06/28	17:54:12	R65.00	6 Jun	2010	1 Cash	No Remarks	CORE
2010/06/28	17:59:22	R65.00	6 Jun	2010	1 Cash	No Remarks	CORE

Invoice Details		Group	
Initial Invoice Amt	R0.00	Tot Society Pay	R0.00
Total Inv Payments	R0.00	Tot Society Claims	R0.00
Outstanding Amount	R0.00	Society Credit	R0.00

Buttons: **New Payment**, **Print Receipt**, **Cancel**

This screen shows you a list of payments that this member has already made before.
To make a new payment, click NEW Payment

Payment Type

Select 1 for Cash or 6 for joining fee or the other options, then press TAB

Amount Paid

You cannot change this amount, if the member is paying for 2 months, then you make a payment for one month then print a receipt and then make another payment for another month and then print a receipt.

Month

Select the Month the member is paying for then press TAB

Year

Select the year the member is paying for then press TAB

Print Receipt

Click this button to print a receipt and send sms if enabled.

If you capture and print a wrong receipt, please keep the wrong receipt with you as proof and then make the correct payment and print a new receipt for the member.

Contact your Admin as soon as possible to cancel the transaction you made by mistake.