

Guidance for completing Funeral Fees form PF1 for use with Office 10

ONCE ONLY

1. Save Form PF1 to your system, you may need to adjust the margins via the layout menu using 'narrow margins' to get it all on 2 pages.
2. Open in Excel. At the bottom of the screen are four tabs. Your screen will have opened automatically for form PF1.
3. Ignore the 2nd tab 'fees'.
4. The 3rd tab 'FD' enables you to complete your funeral directors contacts which will then enable the form to self-populate. To complete the FD section, follow the on-screen guidance.
5. Return to the PF1 tab. Each field that is a required field is marked in red in the right-hand column.
6. The fourth tab is optional. If you are working with more than one church, completing this will enable you to save further work.
7. Complete any fields that will remain constant (e.g. Parish / Benefice name and contact).
8. SAVE the sheet with your church/benefice details completed; you may want to put this file in a special directory, so that it can be readily accessed.

FOR EACH FUNERAL

9. Open the PF1 sheet, and SAVE AS a new file – perhaps using the date or name of the deceased as a file name. How you name the file is not critical, make it meaningful to you.
10. Hover over the 'PCC of' this will produce a drop down menu if you have completed tab four. Click the relevant church. Repeat this process when you reach name of church.
11. Minister category contains a drop-down menu. Click on the empty box, this will reveal a grey triangle to the right, click on this, it will reveal a drop-down menu, click on the relevant category.
12. The line marked Funeral Director and subsequent lines will auto complete if you have entered the details on the 'FD' tab. It is important that you state the branch so that the DBF can send the invoice to the correct destination.
13. The boxes marked 'office use' are for the diocesan office staff.
14. On page two select the relevant service. Again, there is a drop-down menu, hover over the correct box in the column headed 'y', it will reveal a drop-

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down menu, double click. This will populate the costs. This will complete the sub totals for A1 and A2.

15. Enter the figure for estimated miles to be travelled in taking the service. This will auto complete B.

16. In section C enter the agreed fees for each category as £00.00.

17. You will see that the form will automatically have added all the totals together.

18. If a red warning notice occurs, then you have omitted a mandatory field or entered an incorrect amount.

19. Once completed, save the form and e mail to fees@cofesuffolk.org, your treasurer and the funeral director.

Thank you.