

1. Case Import
   1. Case Branch
      1. Case Information > Branch
      2. First Call > Case Options > Branch
   2. Case Number
      1. Pin Menu > Case Identifier
   3. Case Type
      1. Case Information > At Need Box checked
   4. Case Created At
      1. Case Created > Pin Menu
   5. Case Status
      1. Case Information > Case Status
   6. Decedent Title
      1. First Call > Deceased Vitals > Title
      2. Vital Statistics > Basic Information > Title
   7. Decedent First Name
      1. First Call > Deceased Vitals > First Name
      2. Vital Statistics > Basic Information > First Name
   8. Decedent Middle Name
      1. First Call > Deceased Vitals > Middle Name
      2. Vital Statistics > Basic Information > Middle Name
   9. Decedent Last Name
      1. First Call > Deceased Vitals > Last Name
      2. Vital Statistics > Basic Information > Last Name
   10. Decedent Suffix
       1. First Call > Deceased Vitals > Suffix
       2. Vital Statistics > Basic Information > Suffix
   11. Decedent Alternate Name
       1. First Call > Deceased Vitals > Alternate Name
       2. Vital Statistics > Basic Information > Alternate Name
   12. Decedent SSN
       1. First Call > Deceased Vitals > Social Security #
       2. Vital Statistics > Basic Information > Social Security #
   13. Decedent Address 1
       1. Vital Statistics > Basic Information > Address Line 1
   14. Decedent Address 2
       1. Vital Statistics > Basic Information > Address Line 2
   15. Decedent City
       1. Vital Statistics > Basic Information > City
   16. Decedent County
       1. Vital Statistics > Basic Information > County
   17. Decedent State
       1. Vital Statistics > Basic Information > State
   18. Decedent Zip Code
       1. Vital Statistics > Basic Information > Zip
   19. Decedent Country
       1. Vital Statistics > Basic Information > Country
   20. Decedent Gender
       1. First Call > Deceased Vitals > Gender
       2. Vital Statistics > Basic Information > Gender
   21. Decedent Marital Status
       1. Vital Statistics > Basic information > Marital Status
   22. Decedent Level of Education
       1. This did not import to any field
          1. This field must match EXACTLY with what is in the drop-down
   23. Decedent Occupation
       1. Vital Statistics > Education & Occupation > Occupation
   24. Decedent Date of Birth
       1. First Call > Deceased Vitals > Date of Birth
       2. Vital Statistics > Beginning of Life > Date of Birth
   25. Decedent Date of Birth City
       1. Vital Statistics > Beginning of Life > City
   26. Decedent Date of Birth County
       1. Vital Statistics > Beginning of Life > County
   27. Decedent Date of Birth State
       1. Vital Statistics > Beginning of Life > State
   28. Decedent Date of Birth Country
       1. Vital Statistics > Beginning of Life > Country
   29. Decedent Date of Death
       1. First Call > Pronouncement > Date of Death
       2. Vital Statistics > End of Life > Date of Death
   30. Decedent Location of Death
       1. First Call > Location of Death > Location of Death (Decedent's Residence, Hospital, Nursing Home, etc.)
   31. Decedent Location of Death Name
       1. First Call > Location of Death > Hospital Name
       2. Vital Statistics > End of Life > Hospital Name
   32. Decedent Notes
       1. Vital Statistics > Internal Notes
       2. Internal Notes > Internal Case Notes
   33. Client Service Types
       1. We do not import
   34. Disposition Type
       1. Disposition > Basic Information > Disposition Type
   35. Disposition Date
       1. Disposition > Basic Information > Disposition Date
   36. Disposition Notes
       1. Disposition > Internal Notes
       2. Internal Notes > Internal Case Notes
   37. Disposition Address 1
       1. Disposition > Disposition Address > Address Line 1
   38. Disposition Address 2
       1. Disposition > Disposition Address > Address Line 2
   39. Disposition City
       1. Disposition > Disposition Address > City
   40. Disposition State
       1. Disposition > Disposition Address > State
   41. Disposition Zip
       1. Disposition > Disposition Address > Zip
   42. Disposition Country
       1. Disposition > Disposition Address > Country
   43. Signed Date
       1. Goods & Services > Sign > Signed Date
   44. GS Sent To Accounting Date (Exported Date)
       1. Goods & Services > Sign > Exported Date
   45. PA Sent To Accounting Date (Added to Accounting Date)
       1. Goods & Services > Accounting History > Added to Accounting By
2. Acquaintances Import
   1. Title
      1. Family & Friends > Edit Family/Friend > Title
   2. First Name
      1. Family & Friends > Edit Family/Friend > First Name
   3. Middle Name
      1. Family & Friends > Edit Family/Friend > Middle Name
   4. Last Name
      1. Family & Friends > Edit Family/Friend > Last Name
   5. Suffix
      1. Family & Friends > Edit Family/Friend > Suffix
   6. Preferred Name
      1. Family & Friends > Edit Family/Friend > Alternate Name
   7. Roles
      1. Family & Friends > Edit Family/Friend > Roles
         1. All roles did not come over
            1. Family Member
            2. Embalming Authorizer
   8. Relationship
      1. Family & Friends > Edit Family/Friend > Relationship
   9. Spouse First Name
      1. Family & Friends > Edit Family/Friend > Spouse
         1. Imports the First and Last name together
            1. Passare automatically creates a new entry in family & friends for the spouse
   10. Spouse Last Name
       1. Family & Friends > Edit Family/Friend > Spouse
          1. Imports the First and Last name together
             1. Passare automatically creates a new entry in family & friends for the spouse
   11. Deceased
       1. Family & Friends > Edit Family/Friend > Deceased?
          1. Interprets False as No
   12. Date of Death
       1. Family & Friends > Edit Family/Friend > Date of Death
          1. Only shows up if deceased is checked as “Yes”
   13. Place of Death
       1. Family & Friends > Edit Family/Friend > Place of Death
          1. Only shows up if deceased is checked as “Yes”
   14. Place of Burial
       1. Family & Friends > Edit Family/Friend > Place of Burial
   15. Address 1
       1. Family & Friends > Edit Family/Friend > Address Line 1
   16. Address 2
       1. Family & Friends > Edit Family/Friend > Address Line 2
   17. City
       1. Family & Friends > Edit Family/Friend > City
   18. State
       1. Family & Friends > Edit Family/Friend > State
   19. Zip
       1. Family & Friends > Edit Family/Friend > Zip
   20. Country
       1. Family & Friends > Edit Family/Friend > Country
   21. Email Address
       1. Family & Friends > Edit Family/Friend > Email Address
   22. Home Phone
       1. Family & Friends > Edit Family/Friend > Primary Phone
   23. Work Phone
       1. Family & Friends > Edit Family/Friend > Other Phone
   24. Mobile Phone
       1. Family & Friends > Edit Family/Friend > Secondary Phone
3. Events Import
   1. Event Type
      1. Funeral Options > Event
   2. Event Date
      1. Funeral Options > Funeral Service > Date
   3. Start Time
      1. Funeral Options > Funeral Service > Start Time
   4. End Time
      1. Funeral Options > Funeral Service > End Time
   5. Venue Name
      1. Funeral Options > Funeral Service > Venue
   6. Venue Address Line 1
      1. Funeral Options > Funeral Service > Show Address > Address Line 1
   7. Venue Address Line 2
      1. Funeral Options > Funeral Service > Show Address > Address Line 2
   8. Venue City
      1. Funeral Options > Funeral Service > Show Address > City
   9. Venue State
      1. Funeral Options > Funeral Service > Show Address > State
   10. Venue Postal Code
       1. Funeral Options > Funeral Service > Show address > Zip
   11. Attendance
       1. Funeral Options > Funeral Service > Attendance
   12. Notes
       1. Funeral Options > Funeral Service > Notes
4. Goods and Services Import
   1. Item Title
      1. Goods & Services > Funeral Home Charges > Professional Services
         1. All Goods & Services come over as general items
   2. Quantity
      1. Goods & Services > Funeral Home Charges
   3. Unit Price
      1. Goods & Services > Funeral Home Charges
   4. Total Price
      1. Goods & Services > Funeral Home Charges
   5. Add to Initial contract
      1. Goods & Services > Funeral Charges
         1. With answer as true, it shows up in the contract pricing
5. Payment Import
   1. Payment Date
      1. Payments & Adjustments > Date
   2. Payment Type
      1. Payments & Adjustments > Type
   3. Payment Amount
      1. Payments & Adjustments > Amount
   4. Payment Detail
      1. Payments & Adjustments > Details
6. Veteran Import
   1. Military Service
      1. Veteran Information > History of US Military Service > Yes
   2. Branch of Service
      1. Veteran Information > Basic Info > Primary Branch of Service
   3. Military Serial Number
      1. Veteran Information > Basic Info > Military Serial Number
   4. VA File Number
      1. Veteran Information > Basic Info > VA File Number
   5. Date of Enlistment
      1. Veteran Information > Basic Info > Date of Enlistment
   6. Date of Discharge
      1. Veteran Information > Basic Info > Date of Discharge
   7. Current Ranking
      1. Veteran Information > Basic Info > Current or Most Recent Ranking
   8. Military Status
      1. Veteran Information > Basic Info > Status
   9. Honorable Discharge
      1. Veteran Information > Basic Info > Honorable Discharge
         1. Checks the box
   10. Service-Connected Death
       1. Veteran Information > Basic Info > Service-Connected Death
          1. Checks the box