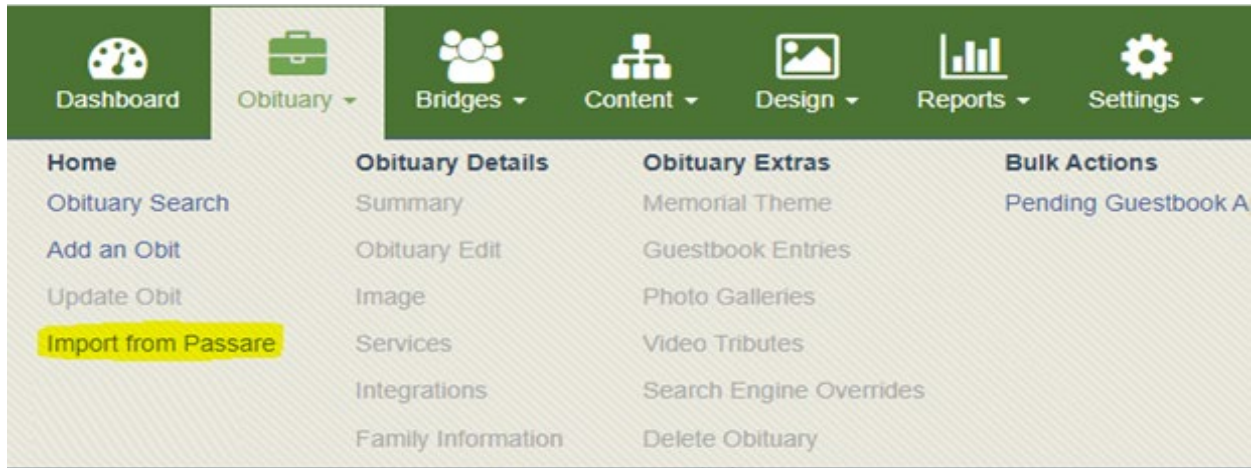


# WebPro/Passare Integration version 2.2 User Guide – GENERAL RELEASE

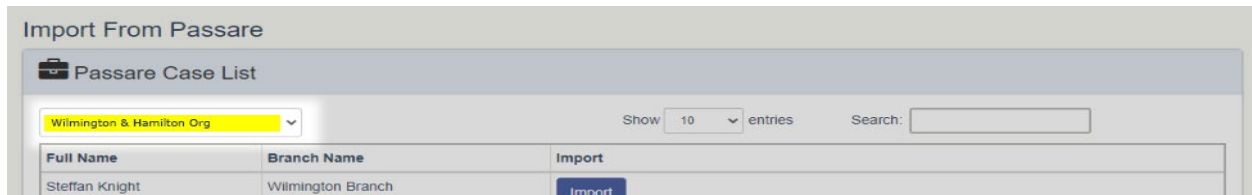
Revised 4/1/21

Passare and Batesville are excited to provide a tool which will allow you to Import cases directly from Passare into your website to complete the basic fields required to post an obituary on your Batesville website. For version 1.0 of the integration, Information imported from Passare includes Decedent Name, Birth Date, Date of Death, Obituary Text, and Service Schedule. Follow the steps below to import or update a case.

- 1) Under the Obituary menu item within the website Admin, select “Import from Passare”



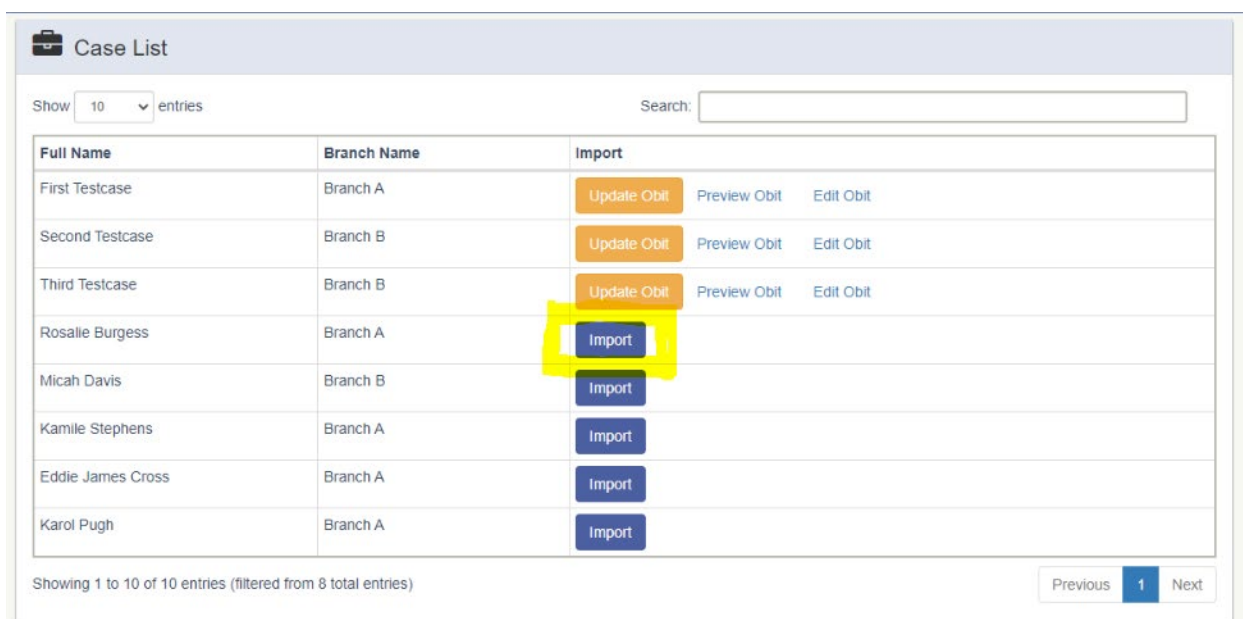
- 2) If your funeral home has multiple “organizations” within the Passare platform, you’ll first need to select the organization you want to search within using the drop selector towards the top of the screen. This drop selector will default to the first organization in the data provided by Passare on your first use. On subsequent uses, this selector will default to the last used organization.



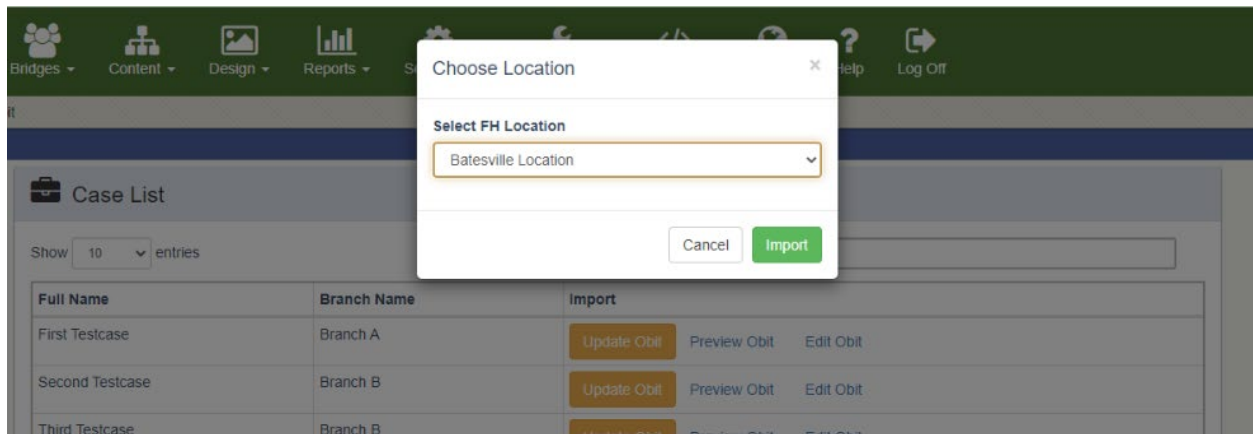
- 3) By default your list of cases in Passare will be filtered to the most recent 10 cases. Use the search tool on the Case List table to filter the list as needed. You can search for partial or complete names, or Branch Names.



- 4) If a case has not yet been imported onto your website, you will see a blue “Import” button next to the case you would like to add to your website to begin the import process.



- 5) The system will attempt to match the location information in your website to the location information provided by Passare. This is an exact match only and is cAsE SeNsAtiveYou will be presented with a dialog where you will select the location that this obituary should be assigned to. If a match is found the location will be selected automatically in the drop selector field, however you can override this and assign any location you choose. After selecting the correct location, click the green “Import” button to complete the process or “Cancel” to close the dialog.



- 6) After your case has completed the import process, the list will update to display an orange “Update Obit” button, a “Preview Obit” link and an “Edit Obit” link.

Clicking **Update Obit** will again prompt you to select the location again. This will allow you to change the location if you have imported to the incorrect location. Completing the update process will retrieve all of the data from Passare again and overwrite those specific data elements in the obituary on your website.

Clicking **Preview Obit** will open the obituary on your website as it would be seen by a visitor to your website.

Clicking **Edit Obituary** will take you into the obituary editor on the website to complete the process by configuring guestbooks, galleries, uploading photos, setting the theme, creating videos, etc.