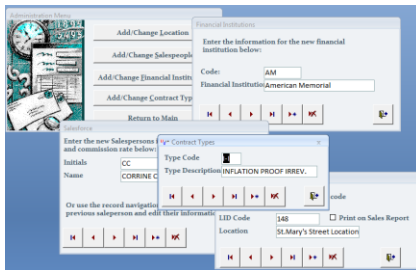


- Add clients and policies
- Update Post payments
- Post year-end earnings
- Print Account level reports

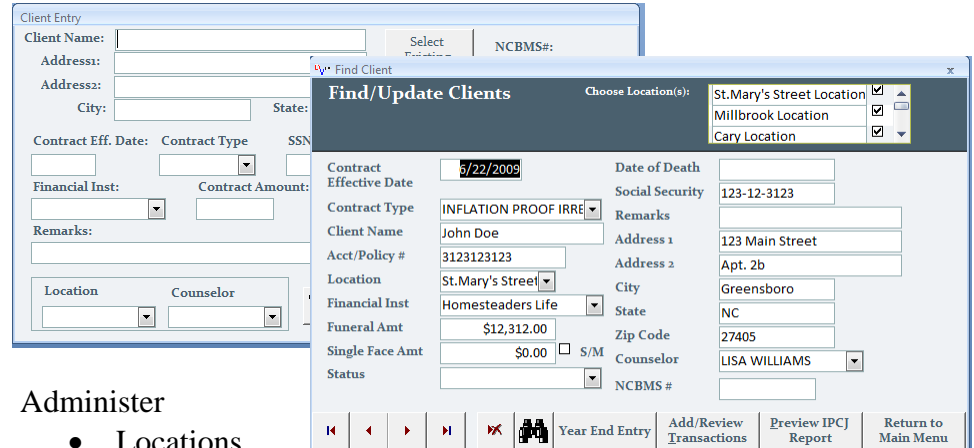


Reports

- Client Reports
 - Contracts Register
 - Cash Receipts
 - Cancelled Contracts
 - Individual Journals
- ✓ BY location
- ✓ BY date range
- ✓ By financial institution
- Sales Reports
 - ✓ Sort by Chapel/ Counselor
 - ✓ YTD, Last Week, This Week
 - MTD, Last Month, Today, Yesterday

DataVault PM –

- Is an easy to use windows application
- Tracks pre-needs funeral service policy sales.
- Provides account journals
- provides sales reports
- Supports multiple chapels and multiple users



Administer

- Locations
- Sales People
- Financial institutions
- Contract Types

