



FIRM
USER'S GUIDE
Revision July, 2016

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Introduction to this Firm User's Guide

This manual will help you understand:

- 1. How to set up Wilbert ESP Users at your Firm**
 - 2. How to set up who at your Firm you want to receive notifications of arrangements that are made**
 - 3. How to run management reports**
 - 4. How to use Wilbert ESP to educate families and help them select an outer burial container.**
-

Home Page

Logging In

Go to www.wilbertesp.com and log in using the email and password that was activated and authorized for you to use Wilbert ESP, WilbertDirect or Wilbert.com.



If you are already logged in to any of these three websites, you will be automatically logged in to the others.

If you forgot your password, click where indicated.

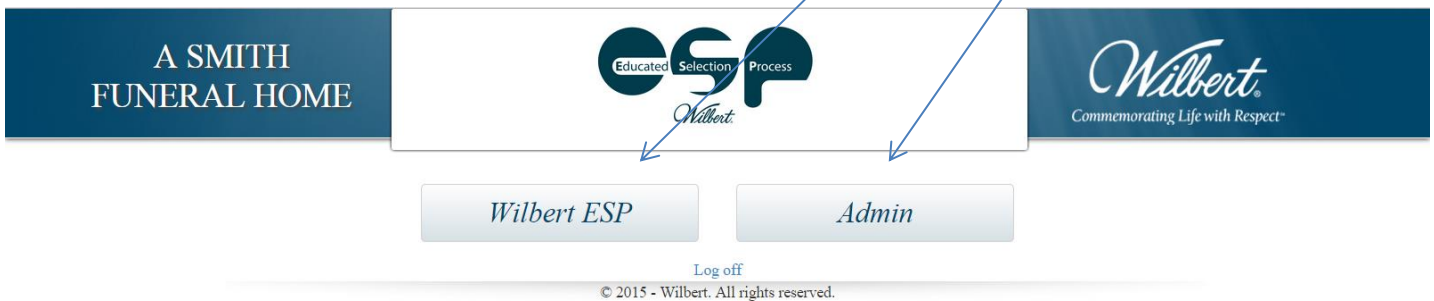
Upon logging in, you will be on the Home Page.

If You Don't Have Log-in Credentials

Contact your Wilbert Licensee who can set up your Firm's Wilbert Education Selection Process as well as help you obtain log-in credentials.

Home Page Menu

Upon logging in, you will see two choices on the Home Page, **Wilbert ESP** and **Admin**



Clicking on Wilbert ESP will take you to the Educated Selection Process. Clicking on Admin will take you to the Administrator Panel.

Wilbert ESP Administrator Panel

The **Wilbert ESP Administrator Panel** allows you use to manage your Wilbert ESP users, who should receive notifications of arrangements made by your staff, access reports on your activity, and more.

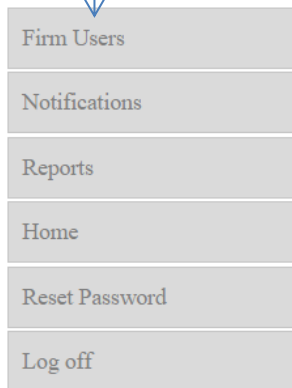
The six functions managed on the Administrator Panel are:

- **Firm Users**
- **Notifications**
- **Reports**
- **Home**
- **Reset Password**
- **Log Off**

Firm Users Section

The **Firm Users** button will bring you to a page labeled *Manage ESP Users*. This is the page you will use to keep track of the people to whom you grant access to use Wilbert ESP.

Wilbert ESP Administrator Panel



Firm Users
Notifications
Reports
Home
Reset Password
Log off

Manage ESP Users

To add a new user, click [here](#).

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To see all of the people in your company who are currently in the database, click on the **GO** box next to the search field. The person's name will appear in the drop-down list. You can also type a name, or partial name, into the Search box to find a specific individual.



This database is the same database as in two other Wilbert websites, www.wilbert.com and www.wilbertdirect.com so those who are activated to use either of these websites will appear on this drop-down list. However, they must still be authorized to use Wilbert ESP.

Authorizing Wilbert ESP Users

To authorize people to use Wilbert ESP, find their name in your drop-down list, highlight it, then go to the top of the page and you will see their Name in the upper right with a check-box option for “Can Access ESP”. Check the box and click the **Save** button.

Wilbert ESP Administrator Panel

Manage ESP Users

Firm Users
Notifications
Reports
Home
Reset Password
Log off

Search

To add a new user, click [here](#).

Customer Name	Customer Number	User
---------------	-----------------	------

Name
Klingenberger, Mark

Affiliation
Funeral Home

Can Access ESP

Adding a New User

Also found on the Firm Users page is an option to **add a new user**. Clicking on that link will bring you to this screen:

ESP
Educated Selection Process
Wilbert.

Add a New User

First Name: *

Last Name: *

Email Address: *

Password: * (5 character min)

Confirm Password: *

* Denotes required fields.

Once a new user is created, that person will be listed on the **Manage ESP Users** page. The user’s name will be shown under the column “users” on the far right.

This person will still need to be granted authorization to use Wilbert ESP (see Authorizing Wilbert ESP Users).

Notifications Section

The **Notifications** button will bring you to the **Manage Notifications** section. Here you will be able to see who at your Firm receives notifications when arrangements are made or the status of an arrangement changes. To remove an email address, click on the **Delete** button to the right of the address.

Wilbert ESP Administrator
Panel

- Firm Users
- Notifications
- Reports
- Home
- Reset Password
- Log off

Manage Notifications

Who should receive notification when an order status changes?

<input checked="" type="checkbox"/>	john.smith@asmithfuneralhome.com	Delete
<input checked="" type="checkbox"/>	todd.smith@asmithfuneralhome.com	Delete
<input checked="" type="checkbox"/>	natalie.jones@asmithfuneralhome.com	Delete

Enter e-mail address only

 Add Address

Cancel Save

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Here you may also add others who need to receive notifications. Simply type an email address into the box on the screen and click the **Add Address** button.

When you have added the email addresses of everyone you want notified, click the **Save** button.

Reports Section

Under the **Reports** button, you will be able to run useful reports on burial vaults sold, individual user activity on Wilbert ESP and other details. On the **Reports** screen, you can choose your **Report Type**, **Firm User**, **Order Date Range**, **Service Date Range**, and **which Products** to include in the report. You can also choose to run the report as either an Excel spreadsheet or as a PDF document.

Wilbert ESP
Administrator Panel

Firm Users
Notifications
Reports
Home
Reset Password
Log off

Reports

Report Type *

Firm User

Order Date Range

Start Date

End Date

Service Date Range

Start Date

End Date

Product(s)

- All
- The Wilbert Bronze®
- Bronze Triune®
- Copper Triune®
- Stainless Steel Triune®
- Cameo Rose Triune®
- Veteran Triune®
- White Tribute®
- Gray Tribute®
- Venetian®
- White Venetian®
- Citadel®
- Continental®
- Salute®
- Monticello®
- Monarch®
- Concrete Box

Report Format * EXCEL PDF

Under the **Report Type** menu, you will find two choices: **Full Order Report** and **Summarized Order Report**.

The Full Order Report has every detail from order dates, to complete specifications on ordered burial vaults, to information on the deceased and service details, to cost/pricing information. The Summarized Order Report provides basic information including order dates, products ordered, the deceased name and cost/pricing information.

Under the **Firm User** menu, you will find the names of all your Wilbert ESP users. You can run a report on all Users or select individual Users. You can also choose several Users by simply clicking on those which you want included in the report.

Under the **Order Date Range** or **Service Date Range** dropdown menus, you can choose specific dates for your report. If you do not select specific dates, your report will include all orders in Wilbert ESP for the particular User(s) that you selected.

Under the **Product(s)** list, you can choose any or all products to include in your report. To choose several products, simply click on those which you want included in the report.

When you have made all of the above selections, select either an **Excel** spreadsheet or an **Adobe PDF** file for your report. Of course, an Excel format will allow you to sort the information while a PDF is read-only.



Be sure that you have enabled pop-ups in your Internet browser options to ensure that Excel files and PDF files will show on your computer.

After you have made all your selections, click on the **Submit** button.

Home Button

The Home button will return you to the Home Page.

Reset Password Section

The **Reset Password** button enables you to change your settings if you need to. Your name and email address may already be auto-populated, but if not, type those in. Select a new password, confirm it, and click **Submit**. Your new password will be saved.



Change Password

First Name:

Last Name:

Email Address:

New Password: * (5 character min)

Confirm Password: *

* Denotes required fields.

Log Off Section

Click on this to log yourself out of Wilbert ESP. You will then see the initial Log-in screen.

References

Desktop Icon/Shortcut



An icon/shortcut is available to place on a computer desktop. There are two versions:

[ESP Logo in White Background \(for desktops with darker colors\)](#)

[ESP Logo with no background \(for desktops with lighter colors\)](#)

These graphics are in .ico format, which is necessary for a desktop shortcut. To create the actual shortcut:

- (1) From your desktop, add a shortcut/hyperlink to www.wilbertesp.com
- (2) Right-click on your new shortcut and select Properties
- (3) Select Change Icon
- (4) Browse to where you downloaded the Wilbert ESP .ico and select

Video Tutorials

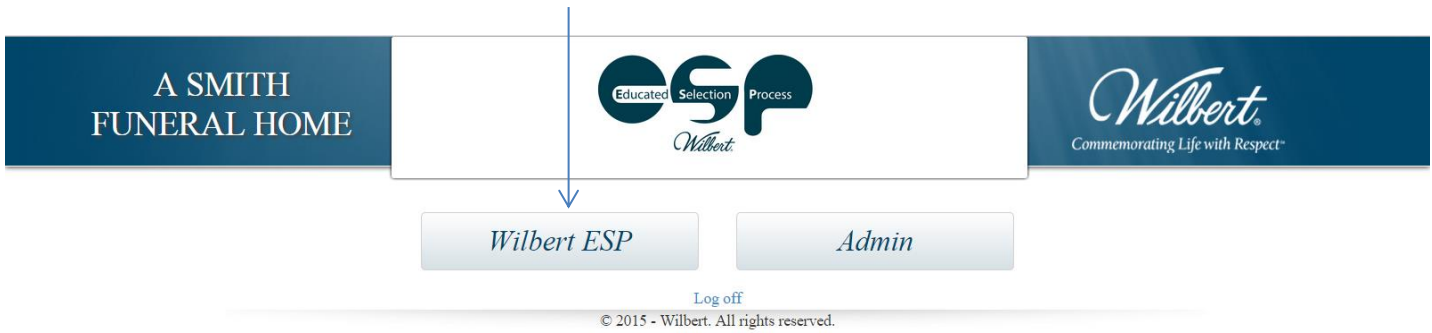
Tutorials are found in this video portfolio:

<http://vimeopro.com/wilbertfuneralservices/wilbert-esp-funeral-professionals>

Password: ESP

Using the Wilbert Educated Selection Process

After going to www.wilbertesp.com and logging in, the user is brought to the Home Page. To begin an arrangement with a family, select the **Wilbert ESP** button.



A series of slides will appear and automatically scroll. These can be used to introduce the family to burial vaults and that there are different types of units that you will be discussing with them as you go through the selection process. While these slides are not designed to stop-and-start (as the education process comes later), they will repeat if there is anything you wish to point out prior to beginning the selection process.



Click on the **Begin** button in the bottom right to advance to the next screen.

Entering the Deceased's Information

This first screen is where the funeral professional will enter the information about the deceased. Certain fields are required: **First Name, Last Name, Date of Birth** and **Service Number**. Date of Death is not a required field, allowing for Pre-Need arrangements. Clicking in either of the “Dates” fields will bring up a calendar which allows quick entry of this information.

On this page, there are also options for **uploading a photo** of the deceased – this photo can be cropped (see Cropping Photos) and will then appear in the center panel at the top of the screen, along with the person’s name, year of birth and year of death. This will then be displayed on every subsequent screen throughout the education and selection process.

Your Funeral Home

ESP
Educated Selection Process
Wilbert.

Wilbert
Commemorating Life with Respect™

First Name *

Middle Name

Last Name *

Date of Birth *

Date of Death

Service Number *

Upload Photo
 No file chosen

Burial Type * Pre-Need At-Need Spring Burial

Do you know the details of your service? * Yes No

At the bottom of the screen, select the **Burial Type**, either **Pre-Need** or **At-Need**. If you are in a market that defers burials until Spring, you will also see a selection for **Spring Burial**. You will also see a **Yes or No** choice as to the service details. Clicking “No” will bring you to the next screen. Clicking “Yes” brings up fields for entering detailed information on the service:

Service Date *

Service Time *

Service Location

Cemetery *

Est. Time of Arrival



City *

State/Province *

Notes

200 of 200 characters remaining


In the example below, the deceased's information has been entered, a Service Number has been entered, a photo from the family has been uploaded, and the photo has been cropped.

Your Funeral Home  **Joan L Madden**
1950 - 2016 [edit](#) 

First Name * Middle Name Last Name *

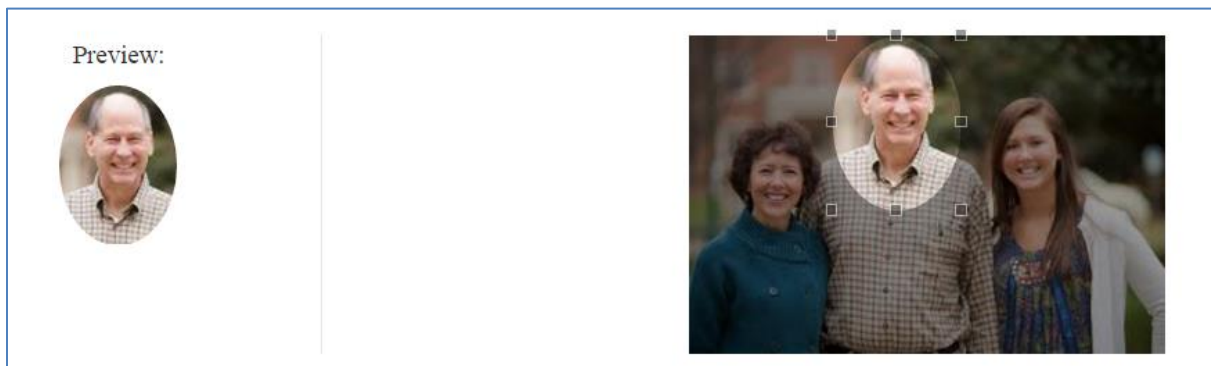
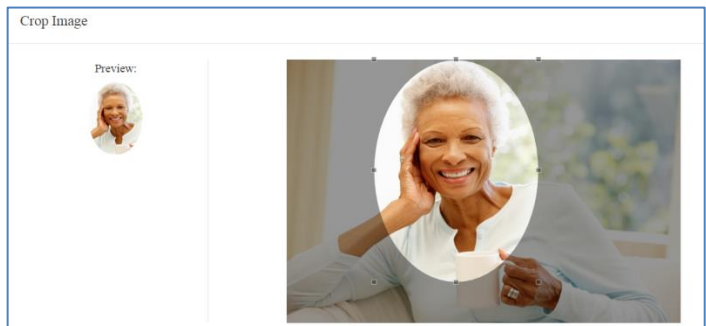
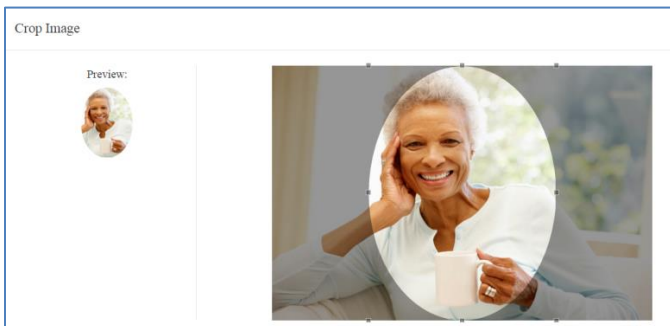
Date of Birth * Date of Death Service Number *

Upload Photo
 No file chosen



Working with and Cropping Photos


The acceptable formats for photo uploads are .jpg and .png and photos may be cropped for the best fit within the oval guidelines. Photo-cropping allows flexibility for off-center photos of the deceased or selecting the deceased from a group photo.



Entering the Service Details

In the example below, details of the service were known and entered. The required fields are **Service Date**, **Service Time**, **Cemetery**, **City** and **State/Province**. For convenience, a pop-up calendar will appear when clicking on the **Service Date** field and a pop-up time selector will appear when clicking on the **Service Time** field and the **Est. Time of Arrival** field. A drop-down menu will appear when clicking on **Service Location** with the choices of Funeral Home, Church, Cemetery Chapel, Graveside and Other. The **Notes** field allows for entering any other miscellaneous information regarding the service.

As you work with the program and enter cemeteries and cities, most Internet browsers will provide automatic pop-ups of previously entered information, which will make it easier for you to select in the future. All of this information will be communicated to your Wilbert Licensee at the end of the Educated Selection Process.



Burial Type * Pre-Need At-Need Spring Burial

Do you know the details of your service? * Yes No

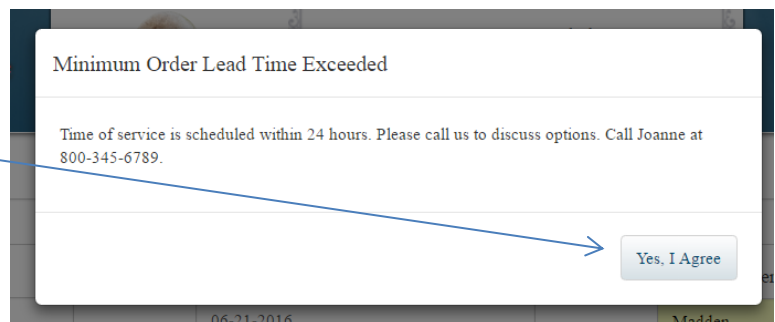
Service Date *	Service Time *	Service Location	
<input type="text" value="06-22-2016"/>	<input type="text" value="9:30 AM"/>	<input type="text" value="Funeral Home"/>	
Cemetery *	Est. Time of Arrival	City *	State/Province *
<input type="text" value="Mount Carmel"/>	<input type="text" value="10:30 AM"/>	<input type="text" value="Hillside"/>	<input type="text" value="IL"/>

Notes 200 of 200 characters

Minimum Order Lead Time Exceeded

If while you are entering the service date and time information you see a “Minimum Order Lead Time Exceeded” pop-up message, you have entered a date and time that is outside of the minimum lead time for the vault delivery that was established by your Wilbert Licensee. In this example, the Licensee established a 24-hour minimum lead time.

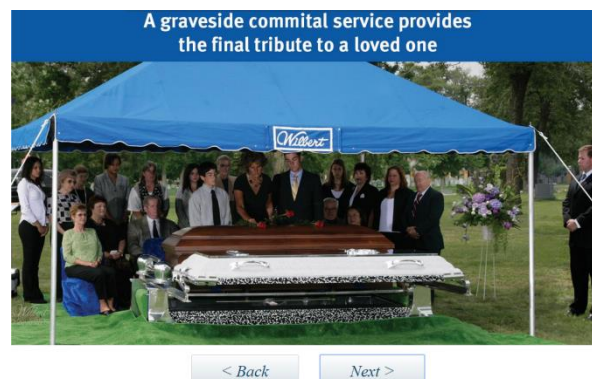
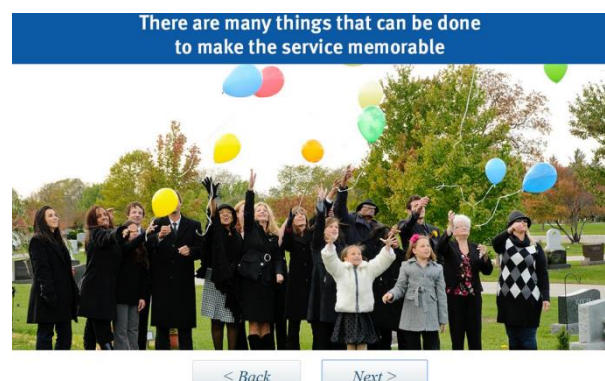
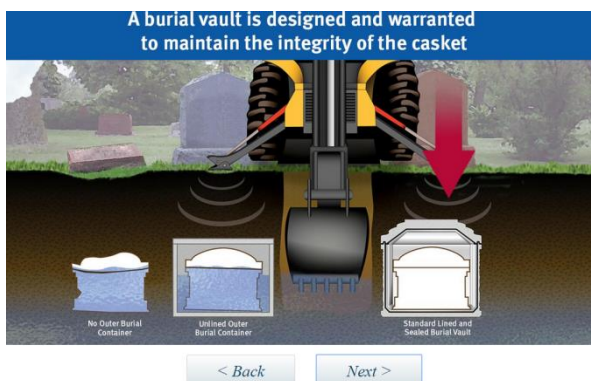
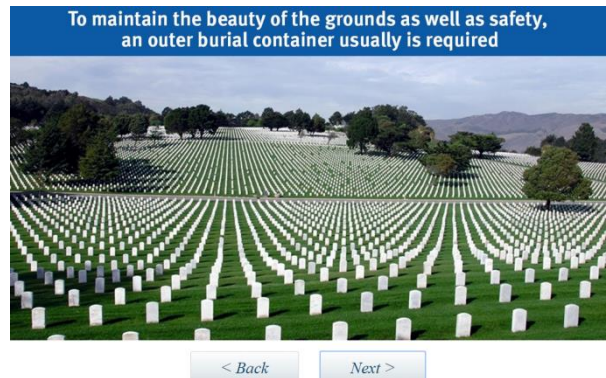
If you indeed meant to enter that date and time, you just need to click **Yes, I Agree** and you may continue to make the arrangements with the family uninterrupted. However, it is necessary to call your Wilbert Licensee at your first opportunity to further discuss.



It may be that you entered an incorrect date or time by mistake, in which case click **Yes I Agree** to close the pop-up message, then go back to the Service Details and correct your entries.

Presentation (Education) Slides

The next five screens feature **Presentation Slides** which allow the funeral professional to begin the education process about why outer burial containers are required, what burial vaults are, and begin the discussion about what can be done in the way of services. Your Wilbert Licensee will have set these slides up for you and may vary from the example shown below.



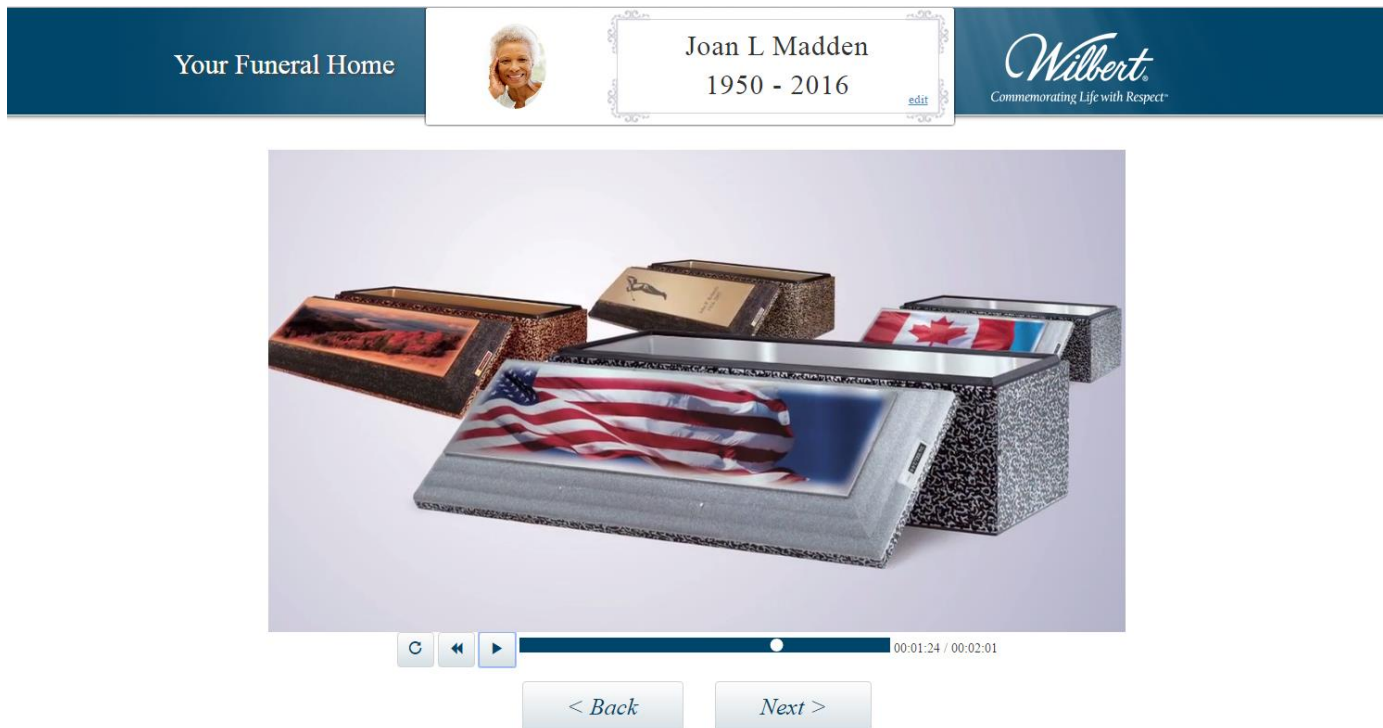
Click **Next** on each slide to advance. You can also click **Back** if you need to clarify any information for the family.

After the fifth slide, you will be taken to a final Education page, this one with a video screen.

Educational Video

The educational video is a two-minute video presenting the family with a quick overview of the role of a burial vault and the introduction of personalization that is available on many burial vaults. The brief video must be watched the first time arrangements are being made with a family. Only after viewing the entire video will the **Next** button become illuminated and advancement made possible. The video can be replayed, if desired.

After the video is viewed, click **Next** to advance to the next page.



The screenshot displays a website interface for a funeral home. At the top, there is a dark blue header bar. On the left, it says "Your Funeral Home". In the center, there is a white box containing a portrait of an elderly woman and a nameplate that reads "Joan L Madden 1950 - 2016". On the right, the logo for "Wilbert" is displayed with the tagline "Commemorating Life with Respect". Below the header is a video player showing several burial vaults. The vaults are shown in various colors and finishes, including one with an American flag design and another with a Canadian flag. Below the video player is a progress bar with a play button and a timestamp of "00:01:24 / 00:02:01". At the bottom of the video player area are two buttons: "< Back" and "Next >".



Once arrangements have been completed and saved, the funeral professional can access the arrangement/service details at any time by searching by Last Name or Service Number on the first ESP screen and bypass the video. Quickly scroll through the various ESP screens to get to the section where you need to add or modify details.

Choosing Personalization

On this screen, the family is asked if any of the four personalization options reviewed in the video are of interest: **Legacy Custom**, **Legacy**, **Life's Reflections** and **Nameplate & Emblem**. Basic descriptions of each option are provided for review. Clicking on any of the four will save that option in the system and be retrieved for later discussion once a burial vault has been chosen. Also, by clicking on any of the four boxes, you will advance to the next screen.

Your Funeral Home



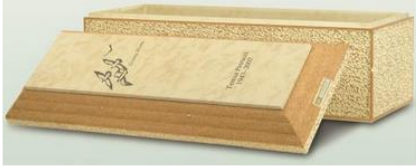



Joan L. Madden
1950 - 2016



Commemorating Life with Respect™

Choose Your Personalization

 <p>Legacy Custom Add photographs or other images to customize the burial vault cover in an ultimate tribute to your loved one. This personalized cover can then be displayed at the graveside service.</p>	 <p>Legacy Add color, depth, and heart-stirring grace to the cover of the burial vault. This beautiful cover can then be displayed at the graveside service.</p>
 <p>Life's Reflections Meaningful words or a defining image on the burial vault cover are applied through a state-of-the-art vinyl adhesion process. This cover can then be displayed at the graveside service.</p>	 <p>Nameplate & Emblem Add symbolism to the burial vault cover with striking designs finished in bronze, copper or stainless steel. This cover can then be displayed at the graveside service.</p>
<p>No Personalization</p>	

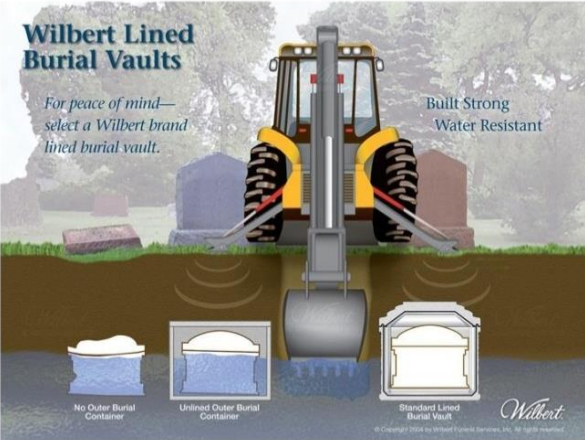
There is also a **No Personalization** option at the bottom of the selections. If a family selects this option, the following screen will ask if they are interested in a protective burial vault. If "I'm not interested in protection" is chosen, the program will advance to the final Order Summary screen with the unlined box. If a family desires a protective burial vault, click Yes to advance to the **Selection** section.

Are you interested in protection?

Wilbert Lined Burial Vaults

For peace of mind—select a Wilbert brand lined burial vault.

Built Strong Water Resistant



© Copyright 2008 by Wilbert Funeral Services, Inc. All rights reserved.

I'm not interested in protection

Burial Vault Selection

The burial vault selection process features a carousel of the Wilbert vaults that you offer at your firm. The opening screen shows the burial vault which you chose as your “standard” unit, typically a center-point unit from which you can move up or down depending on the family’s preferences. As the carousel is structured based on your retail pricing, choosing the **Left Arrow** will show lower-priced units while choosing the **Right Arrow** will show higher-priced units.

Under each of the vault options is the description for that vault. Each will show **Size, Primary Liner, Secondary Liner, Personalization Options, Warranty** and **Weight**. Some vaults will show options others don't, such as different sizes and personalization availability, depending on what is offered by your Wilbert Licensee.

Many of the units will have multiple images that can be chosen by clicking on the smaller images below the main one. One common variation will be to show different personalization options.

For size options, select the arrow in the dropdown menu. The available vault sizes will be shown. When an alternate size is selected, the weight of the vault will also change in the designated window.


If a vault is offered in different color combinations, there will be **Base Color** and **Texture Color** circles on the page. Choosing different combinations will cause the **Color Swatch** to change. If the vault can be fabricated in custom colors, you will see text boxes to the right of the color circles in which you can type a custom color – however, in these cases the color swatch will not change.

When the vault and the choices for the vault have been selected, click **Select This Option**.



Finalizing the Burial Vault Selection & Choosing Personalization

This screen summarizes the vault choice including **Model, Size, Price, Primary Liner, Secondary Liner, Personalization, Color Options, Warranty** and **Weight**. The color swatch will be shown and the vault description is detailed underneath the vault image.

The next step is to choose from the **Personalization** option. The available choices will vary depending on which vault is selected. The Personalization option which the family earlier indicated as being of interest will be auto-selected, but any of the other personalization options can still be chosen.

Your Funeral Home  **Joan L. Madden**
1950 - 2016 [edit](#) **Wilbert**
Commemorating Life with Respect

<< Back Education Personalization Selection


 

Model: Cameo Rose
Triune®
Size: 86 x 30 x 25.5
Price: \$4000.00
Primary Liner: Stainless Steel
Secondary Liner: Trilon II™ high-impact plastic
Personalization: Legacy Custom, Legacy, Life's Reflections, Nameplate, Emblem
Color Options: Base: Cream, Texture: Pink
Warranty: 75 years
Weight: 2915 lbs.

Cover and base double-reinforced with strong, corrosion-resistant stainless steel and high-impact plastic. Brushed stainless steel carapace. Soft white finish with pink accents and sculpted pink rose. May be personalized with special images, emblems or personal photos.

Choose Your Personalization:
 Legacy Custom Legacy Life's Reflections Nameplate / Emblem None

Detail:
 Include Photo

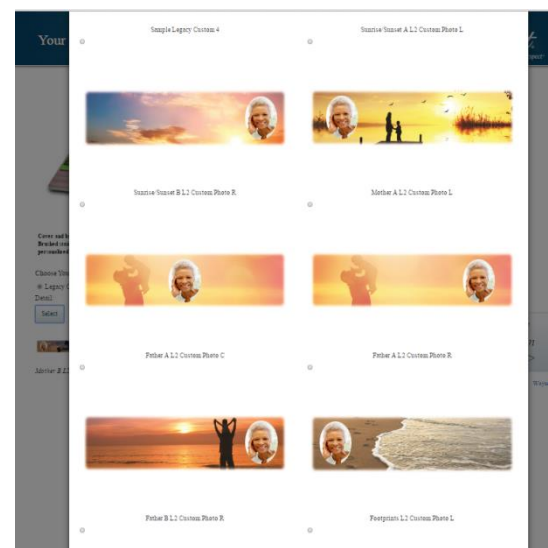

Mother B L2 Custom Photo L

[Review Selection Details >](#)

Choosing an option and clicking **Select** will open an **Image Library** of the choices available within the option.

If you want to show the family how a photo of their loved one will look on a vault cover image, check **Include Photo** (this option will be available when Legacy Custom is selected). The example at right shows a library of **Legacy Custom** images, with some variations in the placement of the photo. To select an image, click the image and then click anywhere outside the pop-up window.

All vault details including selected personalization are now shown. Click **Review Selection Details** to go to the final screen.




Summary Screen

The final page of the selection process will look like the one below. This page includes all the details of the family's selection and enables you to **Save** or **Save and Print** for your records and/or the family.


Clicking **Save** will store the arrangement in the cloud where it can later be retrieved on the opening screen by typing in or searching for the **Service Number** or by **Last Name**. Clicking **Save** will also automatically send a PDF of this **Summary** via email to all of the individuals in your firm who have been set up in your **Administration** function to receive Notifications. In addition, your Wilbert Licensee will receive a notification so that they can initiate the fulfillment process. The Wilbert ESP program will then return to the opening screen.

Clicking **Save & Print** will also store the arrangement in the cloud and send the PDF of the **Summary** to all those set up to receive notifications, but in addition will open the PDF on the computer screen where it can be viewed, printed (if your computer is connected to a printer), and/or saved in your computer hard drive or company network. *Note that in order for this PDF to open, you must first set up your Internet browser to enable pop-ups for the URL www.wilbertesp.com.*

Your Funeral Home

Joan L. Madden
1950 - 2016

edit



Order Type: At-Need Case Number: Madden

Case Information

First Name: Joan
Middle Name: L
Last Name: Madden
Life Dates: 8/11/1950 - 7/12/2016

Order Details

Service Date: 7/13/2016 9:30 AM
Service: Funeral Home
Location:
Cemetery: Mount Camel
Estimated Time of Arrival: 10:30 AM
City: Hillside
State/Province: IL
Notes:
200 of 200 characters remaining


Vault Information

Model: Cameo Rose
Truene®
Size: 86 x 30 x 25.5
Price: \$4000.00
Weight: 2915 lbs.
Primary Liner: Stainless Steel
Secondary Liner: Trilon II™ high-impact plastic
Warranty: 75 years

Customizations


Personalization: Legacy Custom
Color Options: Base: Cream
Texture: Pink

Personalization



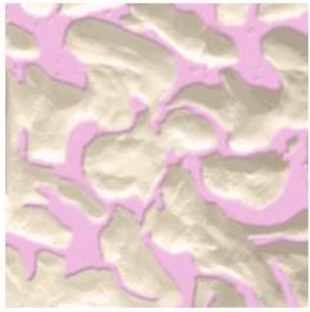
Sunrise/Sunset B L2 Custom Photo R

Vault Model



Continue with new order

Color



Print Warranty

Printing the Burial Vault Warranty

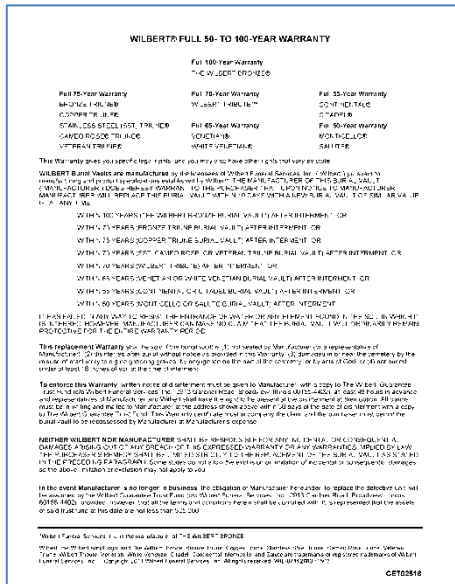
If you would like a burial vault warranty to print for the family, check the **Print Warranty** box on the Summary Screen **before** you hit Save or Save & Print.

A PDF of the warranty will open on your computer screen where it can be viewed, printed (if your computer is connected to a printer), and/or saved in your computer hard drive or company network. *Note that in order for this PDF to open, you must first set up your Internet browser to enable pop-ups for the URL www.wilbertesp.com.*


The first page with the details is pre-filled with information captured from Wilbert ESP. The only information that must be written in is the name and address of the Purchaser.

Also, if you use warranty numbers you may enter that at the bottom of the page.

The second page provides the actual warranty details.



WILBERT® TRADEMARK BURIAL VAULT* PURCHASER INFORMATION



DATE: 7/12/2016

FUNERAL DIRECTOR OR OTHER SELLER: Your Funeral Home

Name

123 Main Street Anytown 60000

Address City and State Zip Code

BRAND NAME OR TRADEMARK OF BURIAL VAULT PURCHASED: Cameo Rose Triune

FOR THE INTERMPT OF: Joan L Madden

On 7/13/2016 at Mount Carmel Cemetery

LOCATION: Hillside, IL

City and State

Name of Purchaser (Print)

Signature of Purchaser

Address

City and State Zip Code

The Funeral Professional makes no warranty of fitness or merchantability, expressed or implied, if such disclaimer is permitted by law.

*The Wilbert Trademark Burial Vaults include: THE WILBERT BRONZE®, BRONZE TRIUNE®, COPPER TRIUNE®, STAINLESS STEEL TRIUNE®, CAMEO ROSE® TRIUNE®, VETERAN TRIUNE®, WILBERT TRIBUTE™, VENETIAN®, WHITE VENETIAN®, CITADEL®, CONTINENTAL®, MONTICELLO®, and SALUTE®.

WARRANTY NUMBER: MANUFACTURER: TEST LICENSEE1

Finding/Retrieving an Arrangement Already Made

When you need to retrieve an arrangement that has already been made – for example, if the arrangement is being modified, when a pre-need becomes an at-need, if you want to call up a past arrangement as a reference, and so forth – you can retrieve it by searching one of two ways:

- (1) By Service Number – You will need to know the **Service Number** to enter in the **Service Number field** on the first page of the Wilbert ESP program. The entire number must be entered. Enter the number and click the search button to the right of the field.
- (2) By Last Name – You can enter in the **Last Name field** the deceased’s entire last name or part of the last name and click the search button to the right of the field.

A SMITH FUNERAL HOME

ESP
Educated Selection Process
Wilbert

Wilbert
Commemorating Life with Respect

First Name *

Middle Name

Last Name *

Date of Birth *

Date of Death

Service Number *

Once you retrieve the Arrangement, you can scroll through the program screens to get to the section(s) that you need to modify, if any, or scroll through to the final Summary page.

Setting Up Single Sign-On for Multiple Locations

If your Firm has multiple locations and you wish to have certain Wilbert ESP Users set up to work at or access ESP data for multiple locations, a single sign-on for those Users can be set up.

When a multiple-location user signs onto Wilbert ESP, a **drop-down box** will appear with the list of locations. The user would select which location he or she is accessing and would then be in that location’s ESP program until he or she logs off.

If you have multiple locations and would like single sign-on set up for any of your staff, talk to your Wilbert Licensee.

JONES FUNERAL HOME

ESP
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Wilbert

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Commemorating Life with Respect

S001736 - JONES FUNERAL HOME (F) ▼

S999991 - MIKE NASH ESP TEST FH (Firm)

S001736 - JONES FUNERAL HOME (Firm)

S002063 - MCGILLEY-HOGE FUNERAL HOME (Firm)

Log off

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