



USER GUIDE

Facility Dashboard

The complete guide for funeral homes, mortuaries, chapels, cemeteries and crematoriums

Who this guide is for

Owners, directors, front-desk and mortuary staff

Where to sign in

your facility's own address, for example sfh.sankorra.com

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CHAPTER 1

Getting started

This chapter covers how to get into the dashboard, what to do when you cannot, and the parts of the screen that stay with you wherever you go.

You reach Sankorra in an ordinary web browser (Chrome, Safari or Edge) on a computer, a tablet or a phone. You do not install anything.

You open **your facility's address, which your administrator gives you** — for example **sfh.sankorra.com**. Write it down and save it as a bookmark on the machines your team uses. Every screen in this guide is inside that address.

1.1 Signing in

WHAT THIS SCREEN IS FOR

proving who you are, so the dashboard can show you your facility's cases, storage, money and staff.

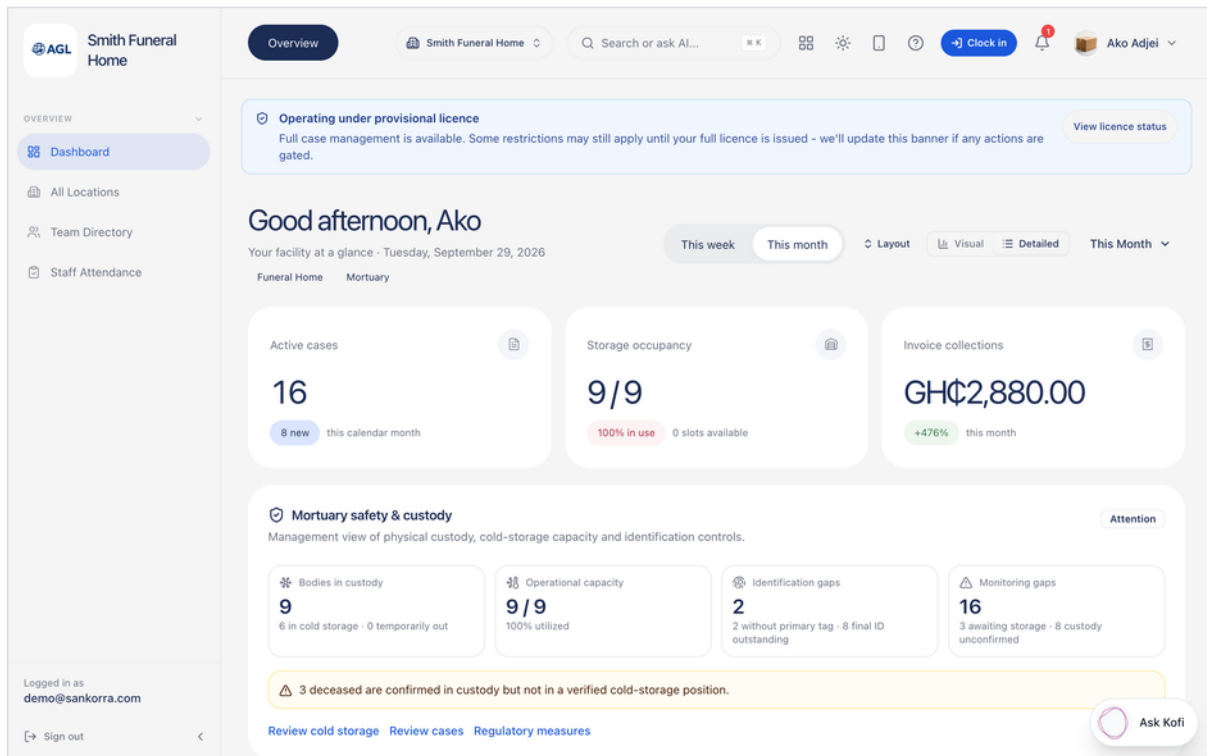
HOW TO GET HERE

Open your facility's address. If you are not signed in, the sign-in screen appears by itself.

WHAT YOU SEE ON THE SCREEN

On a wide screen the page is in two halves. The left half is a welcome panel with your facility's logo and welcome wording if your administrator has set them up. The right half is the form you fill in:

- **Facility Sign In** — the small label above the form.
- **Sign in to your facility dashboard** — the heading.
- **Email or Staff ID** — one box that accepts either. Type your work email address, or the Staff ID your administrator issued you (it looks like **SNK-001**).
- **Password** — with a small eye button so you can show what you typed and check it before pressing Sign in.
- **Forgot your password?** — a link beside the Password label.
- **Sign in** — the wide button that submits the form.
- **Need an account? Create one** — for a person who has been invited but has not yet made an account.
- **Privacy** and **Terms** links, and a footer line reminding you that this is for authorised facility staff only and that activity may be logged for audit and security.



The sign-in panel showing the Email or Staff ID box, the Password box with the Forgot your password link, and the Sign in button

WHAT YOU CAN DO HERE

To sign in with your email address:

- 1 Type your work email address in the **Email or Staff ID** box.
- 2 Type your password.
- 3 Press **Sign in**.
- 4 Wait. The button reads "Signing in..." while it works.

To sign in with your Staff ID instead:

- 1 Type your Staff ID (for example **SNK-001**) in the **Email or Staff ID** box.
- 2 Type your password.
- 3 Press **Sign in**.

To reset a password you have forgotten:

- 1 Press **Forgot your password?**
- 2 Type the email address attached to your account.
- 3 Press **Send reset link**.
- 4 The panel changes to **Check your email** and tells you which address the link went to.
- 5 Open the message on the same device and follow the link.
- 6 Type your new password twice, then press **Reset Password**.
- 7 When you see "Password updated successfully", press **Go to sign in now**, or wait a few seconds and the screen takes you there.

To accept a staff invitation:

- 1 Open the invitation link your administrator sent you.
- 2 Press **Create account & accept**.
- 3 Choose a password on the next screen.
- 4 If you already have a Sankorra account under a different email address, press **Sign in** on that welcome panel instead and use that account.

Good to know

- Staff ID sign-in only works when you open your own facility's address, because that is how the screen knows which facility's Staff IDs to look in. On any other address you will be told to use your email address instead.
- A new password must be at least 8 characters, and both boxes must match.
- When you reset your password, you are signed out everywhere else. Anyone using your account on another phone or computer will have to sign in again.
- If your facility has its own welcome picture, logo, privacy link or footer wording, that is set by your administrator and only appears on your facility's own address.

1.2 Two-factor sign-in

WHAT THIS SCREEN IS FOR

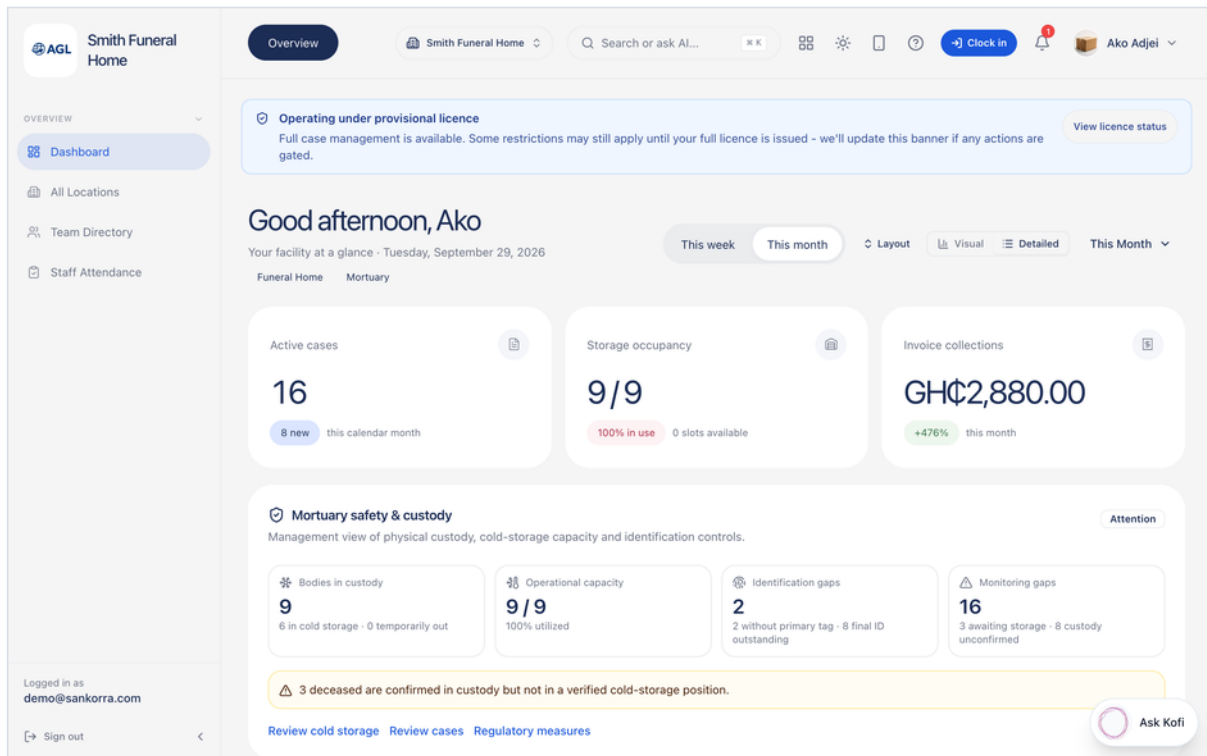
asking for a second proof of identity (a 6-digit code from an authenticator app on your phone) after your password.

HOW TO GET HERE

It appears by itself, straight after your password, if two-factor sign-in has been switched on for your account.

WHAT YOU SEE ON THE SCREEN

- **Two-Factor Verification** — the small label above the form.
- **Enter your authenticator code** — the heading, with the line "We need a second factor to finish signing you in."
- **Authenticator code** — one box for six digits. It only accepts numbers.
- **Verify & sign in** — stays greyed out until you have typed six digits.
- **Cancel and sign in as a different user** — signs you out and returns you to the ordinary sign-in form.



The two-factor step showing the Authenticator code box and the Verify and sign in button

WHAT YOU CAN DO HERE

To finish signing in:

- 1 Open your authenticator app on your phone.
- 2 Find the 6-digit code for Sankorra.
- 3 Type it into **Authenticator code**.
- 4 Press **Verify & sign in**.
- 5 If it says the code is invalid, wait for the app to show a fresh code and try again — the codes change every 30 seconds.

Good to know

- If the screen instead shows a red message saying your account requires two-factor sign-in but no authenticator is set up, you cannot get in on your own. Press **Back to sign in** and ask your administrator.
- If the check cannot be completed at all — for example a bad connection — the dashboard deliberately keeps you on the sign-in page rather than letting you through. Try again on a better connection.

1.3 Setting up two-factor sign-in

WHAT THIS SCREEN IS FOR

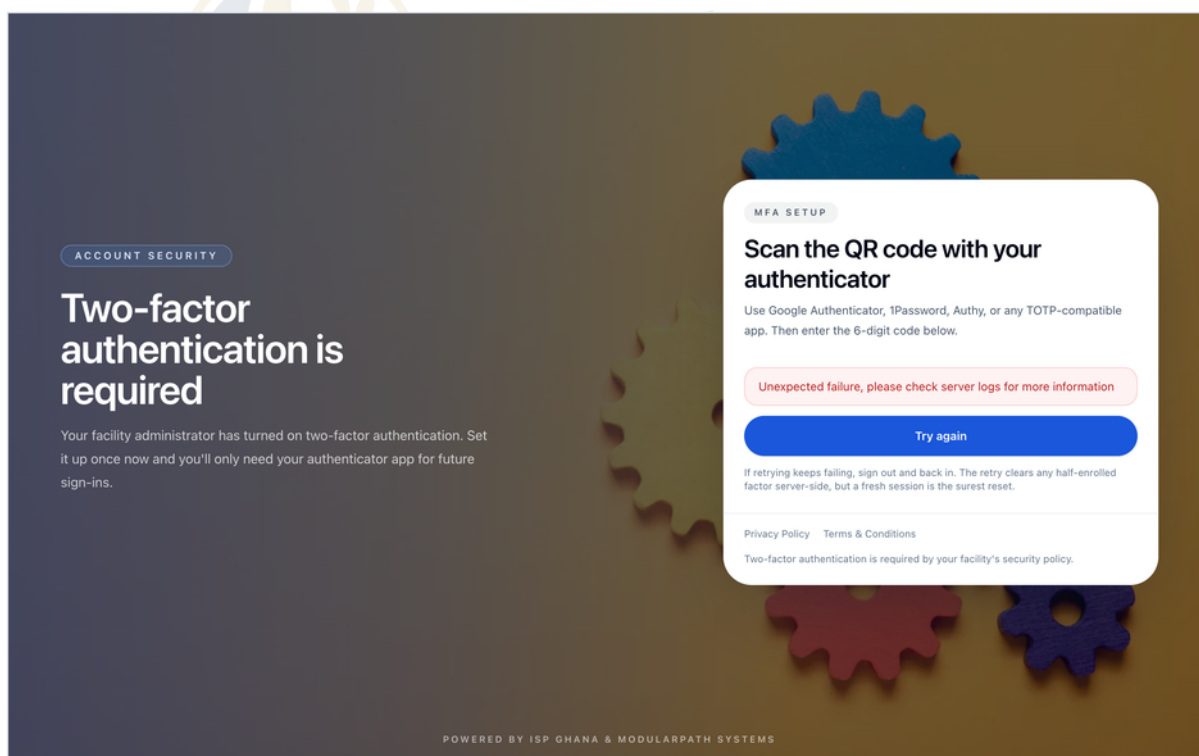
enrolling your phone once, when two-factor sign-in has been made compulsory and you have not set it up yet.

HOW TO GET HERE

You are taken here automatically after sign-in. You cannot use the rest of the dashboard until you finish.

WHAT YOU SEE ON THE SCREEN

- **Two-factor authentication is required** — the welcome panel explains that you set this up once and then only need your authenticator app in future.
- **Scan the QR code with your authenticator** — the heading, with a note that Google Authenticator, 1Password, Authy or any similar app will work.
- A square QR code.
- **Can't scan? Enter this key manually:** followed by a long key you can type into your app by hand.
- **6-digit code** — the box where you type the code your app then shows.
- **Verify and continue.**



The setup screen showing the QR code, the manual key, and the 6-digit code box

WHAT YOU CAN DO HERE

To set up your authenticator:

- 1 Install an authenticator app on your phone if you do not have one.
- 2 In the app, choose to add a new account by scanning a code.

- 3** Point your phone at the QR code on the screen, or type the key shown underneath it.
- 4** Read the 6-digit code your app now shows for Sankorra.
- 5** Type it into **6-digit code**.
- 6** Press **Verify and continue**. You land on the page you were heading for.

Good to know

- If the screen says it could not start the setup, press **Try again**. If that keeps failing, sign out, sign back in and start again.
- Keep your phone. If you lose it you will need your administrator's help to get back in.

1.4 When a sign-in fails

WHAT THIS SCREEN IS FOR

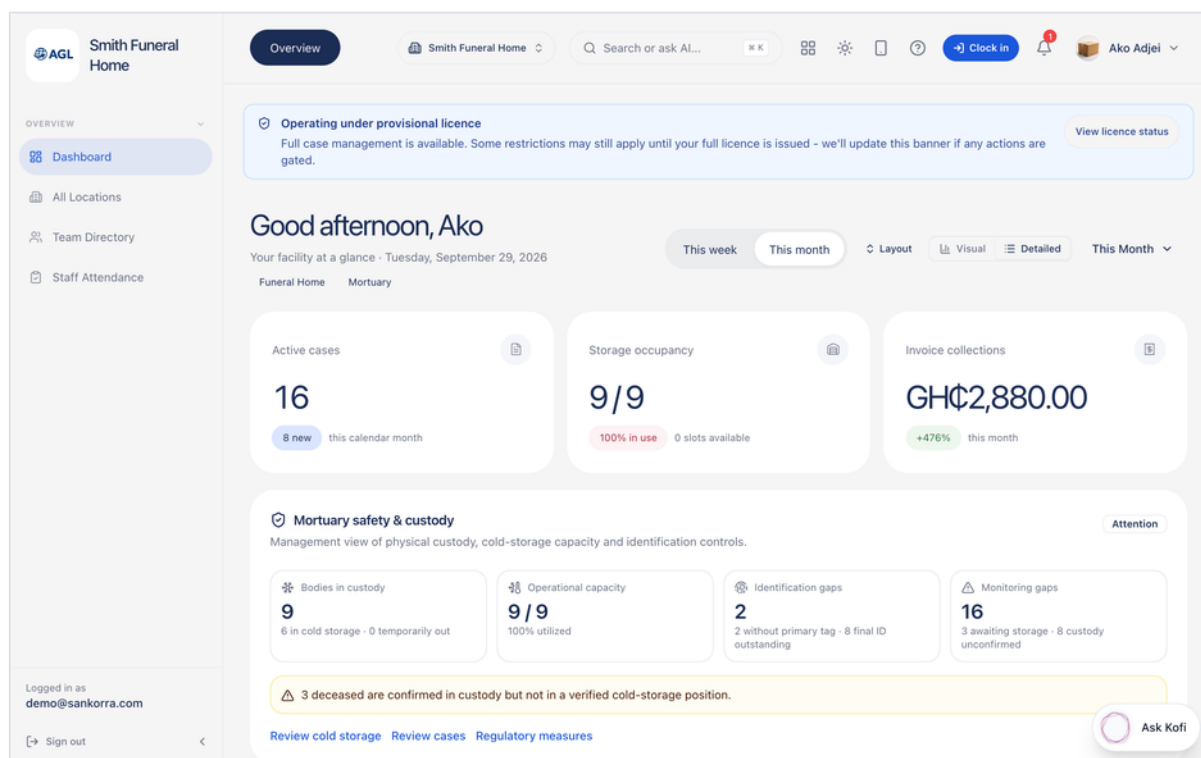
nothing new opens; the messages appear in red on the sign-in form itself. This section explains what each one means.

HOW TO GET HERE

These appear on the sign-in screen itself, in a red or amber box above the Email or Staff ID box.

WHAT YOU SEE ON THE SCREEN

What you see	What it means
Invalid login credentials	The email address, Staff ID or password is wrong.
Invalid staff ID or password	That Staff ID does not exist at this facility.
Too many failed sign-in attempts...	The account is locked for a cooling-off period.
Looks like this email is a customer account...	You are a family customer, not facility staff.



The sign-in form showing the red "Too many failed sign-in attempts" message

WHAT YOU CAN DO HERE

To get back in after a lock-out:

- 1 Read the message. Five wrong passwords within fifteen minutes lock the account for fifteen minutes.
- 2 Wait out the cooling-off period, then try once, carefully.
- 3 Or press **Forgot your password?** and set a new password instead of waiting.
- 4 If you are certain of the password and still locked out, ask your administrator — they can unlock the account for you.

To fix a "customer account" message:

- 1 Read the amber notice. This happens when the email address belongs to a family member's account from the Sankorra phone app, not to facility staff.
- 2 If you are a family member, press **Open the Sankorra app**.
- 3 If you are staff, sign in with the work email address or Staff ID your facility set you up with.

Good to know

- Wrong-password attempts are counted against the email address, not against your computer, so switching browsers does not reset the count.
- The amber "customer account" notice also signs that session out, so a shared computer is not left half signed-in.

1.5 The parts of the screen that are always there

WHAT THIS SCREEN IS FOR

this is the frame around every page: the menu down the left, the bar across the top, and the help bubble in the corner.

HOW TO GET HERE

It is there from the moment you sign in.

WHAT YOU SEE ON THE SCREEN

Down the **left** (on a computer):

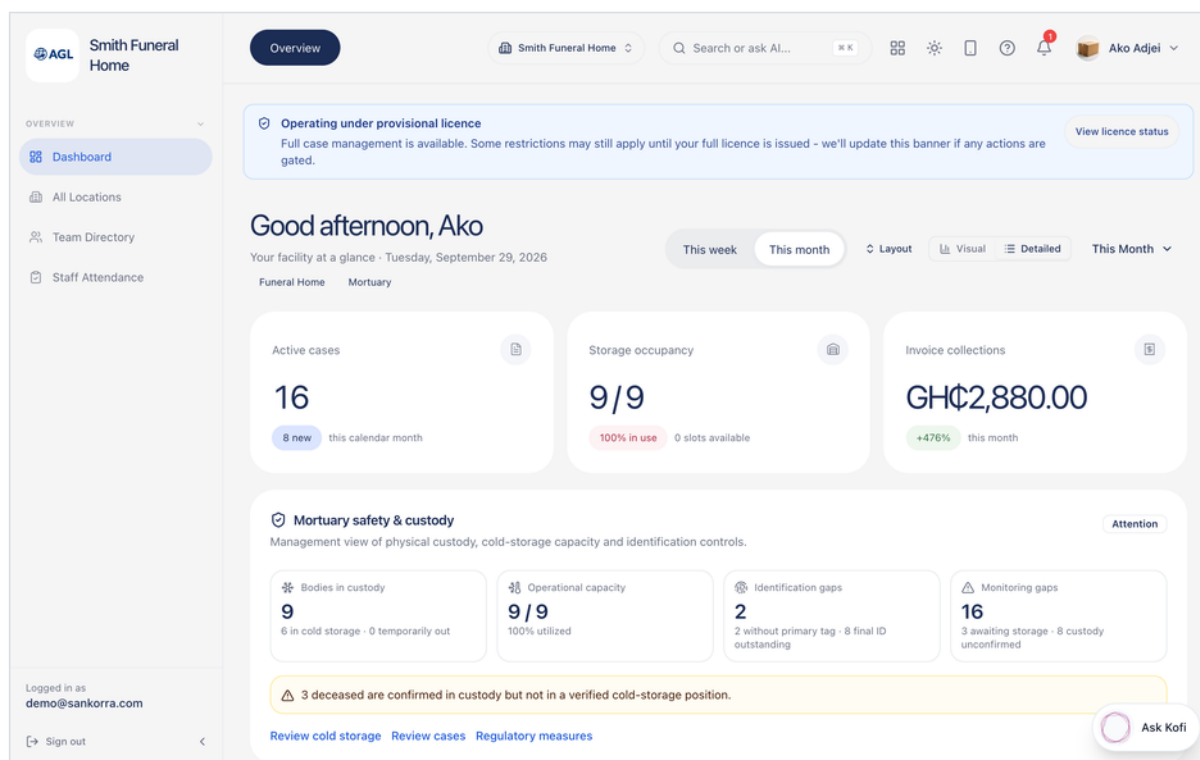
- Your facility's logo and name at the top.
- The menu, grouped into headed sections. Press a section heading to open it; opening one closes the last. Sections you will meet in this guide include **OVERVIEW**, **CASE MANAGEMENT** and **FINANCE**.
- Small number badges on some menu lines: the count of active cases beside **Cases (Records of Care)**, waiting transfers beside **Transfers**, and new enquiries beside **Inquiries**.
- **Logged in as** with your email address, and a **Sign out** button.
- Arrow buttons at the bottom to shrink the menu to icons only, and back. You can also drag the menu's right edge to make it wider, and double-click that edge to put it back to its normal width.

Across the **top**:

- A **menu** button (three lines) on phones and tablets, which slides the menu in from the left.
- A **back arrow** on every page except the dashboard. On the dashboard the word **Overview** sits there instead.
- **Scan Tag** — a white button, on phones and tablets only, that opens the body-tag scanner.
- The **workplace switcher** — a rounded button showing your facility's name. It only appears if you belong to more than one facility, are a registered practitioner, or your facility is part of a group. See section 1.7.
- **Search or ask AI...** — a rounded search box, on computers only.
- A **squares** button — "Browse sidebar categories". On a phone or tablet, where the left menu is off screen, this is the quickest way around.
- A **sun / moon / screen** button that switches between light, dark and "follow my device" appearance.
- A **phone** button (computers only) holding the App Store and Google Play links for the Sankorra family app, so you can share them with a family during arrangements.
- A **question mark** button (computers only) that opens the documentation.
- The **clock-in pill** — only when your facility uses Punchbook and you are allowed to mark your own attendance. See section 2.4.
- An **announcements** tray.
- The **notifications bell**, with a red count of unread items.
- Your **name and picture**, which opens your own menu.

In the bottom-right corner sits a round chat bubble — the assistant. See section 1.6.

Coloured strips can appear between the top bar and the page: a licensing notice, a subscription notice, and a regulator notice. They are explained in "Good to know" below.



The whole dashboard showing the left menu, the top bar with search, bell and user menu, and the help bubble in the corner

WHAT YOU CAN DO HERE

To open a page:

- 1 Press the section heading in the left menu (for example **CASE MANAGEMENT**).
- 2 Press the line you want (for example **Cases (Records of Care)**).

To see the whole menu at once instead of only your current section:

- 1 Press the **squares** button in the top bar.
- 2 Turn **Show all sections** on.
- 3 The setting is remembered for you next time.

To jump straight to a section:

- 1 Press the **squares** button in the top bar.
- 2 Press any tile. Each tile shows the section name and how many pages it holds.

To read your notifications:

- 1 Press the **bell**.
- 2 Press any item in the list to open it in full.
- 3 If it points at a page, press the button in the box to go there.

4 Press **Mark all read** to clear the red count.

To check who you are signed in as, or open your own settings:

- 1 Press your name or picture in the top-right corner.
- 2 The panel shows your name, your Staff ID if you have one, your email address and your role.
- 3 Press **Profile** for your own details, or **Security** for your password and two-factor settings.

To sign out:

- 1 Press your name in the top-right corner, then press **Sign out**.
- 2 Or press **Sign out** at the bottom of the left menu.

Good to know

- The menu only lists what you are allowed to open. See section 1.8.
- **Application under MOFFA review**, **Operating under provisional licence** or **Facility licence suspended** strips relate to your MOFFA licence. Press the button in the strip to see where the application stands. While a licence is only pending or is suspended, you cannot create cases.
- **Trial ends...**, **Subscription ended...** or **Subscription locked** strips relate to your Sankorra subscription. Once a subscription is locked, every page except billing, your own profile and your own security settings is closed until it is paid.
- A red or amber **regulator measure** panel means the regulator has placed a measure on your facility. If it says an intake restriction is active, taking in new deceased is blocked except through an emergency override.
- **Session refresh lost connection** means the app briefly lost touch with the server. Press **Retry**. If that fails, press **Sign in again**.
- **Session expiring soon** with a countdown appears when your facility sets an idle time limit. Press **Stay signed in** to carry on, or **Sign out now**. If you do nothing you are signed out. The warning appears about two minutes before the cut-off, and the check runs every half minute, so the actual sign-out can be a few seconds late.
- **We couldn't load your facility** means your sign-in is fine but the server could not be reached. Press **Try again**; it usually clears by itself. Do not start a new licence application from this screen.

1.6 Search and the assistant

WHAT THIS SCREEN IS FOR

finding a page or a case quickly, asking the assistant a question, and reaching a human for help.

HOW TO GET HERE

Press **Search or ask AI...** in the top bar, or hold the Command (or Ctrl) key and press **K**. The assistant is the round bubble in the bottom-right corner of every page.

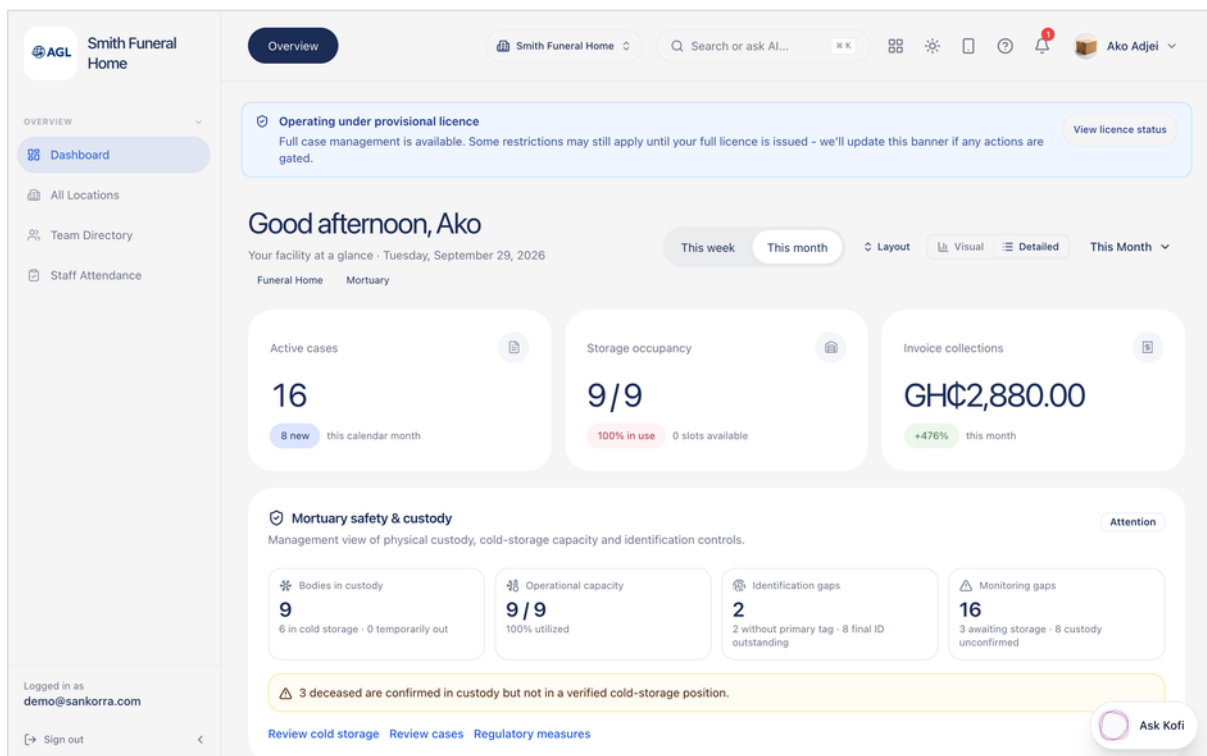
WHAT YOU SEE ON THE SCREEN

The search box opens over the page with:

- A typing line. Its wording is "Search or ask AI..." when your facility has AI search switched on, and "Search pages..." when it does not.
- **Quick actions** — **New Case**, **Create Invoice** and **View Reports**.
- A list of pages, grouped by section, which narrows as you type.
- When AI search is on, matching cases, invoices, staff, storage and payments appear as you type, after a short pause.

The bubble in the corner opens a panel with:

- The assistant's name (**Kofi** or **Ama**, whichever you chose) and a short introduction.
- Suggested questions to start you off, such as "How many active cases do we have?", "Show overdue invoices", "What's our storage utilization?" and "Summarize this month's activity".
- A typing line at the bottom.
- **Related guides** links under some answers.
- A way to hand over to a person, and **Back to Kofi** to return to the assistant afterwards.



The search box open over the dashboard with quick actions and page results, and the assistant bubble in the corner

WHAT YOU CAN DO HERE

To find a page:

- 1 Press **Search or ask AI...**, or press Command (or Ctrl) and **K**.
- 2 Type part of the page name, for example "invoices".
- 3 Press the result you want.

To ask the assistant something:

- 1 Press the round bubble in the bottom-right corner.

2 Press one of the suggested questions, or type your own and press Enter.

3 Read the answer. Press a **Related guides** link if one is offered.

To reach a person instead:

1 Open the bubble.

2 Press the option to talk to a human at the bottom of the panel.

3 Your conversation so far is passed along so the person answering can see the background.

4 Type your question and wait for a reply. You can press **Back to Kofi** and carry on working; a reply shows as a mark on the bubble.

Good to know

- Searching for cases and invoices by name only works when your facility has AI search switched on. Without it, search finds pages only — open **Cases** and use the search box there instead.
- The assistant answers from your own facility's information. It cannot change anything; it can only tell you and point you at the page.
- You can switch the assistant between Kofi and Ama from inside the panel.

1.7 Switching to another location

WHAT THIS SCREEN IS FOR

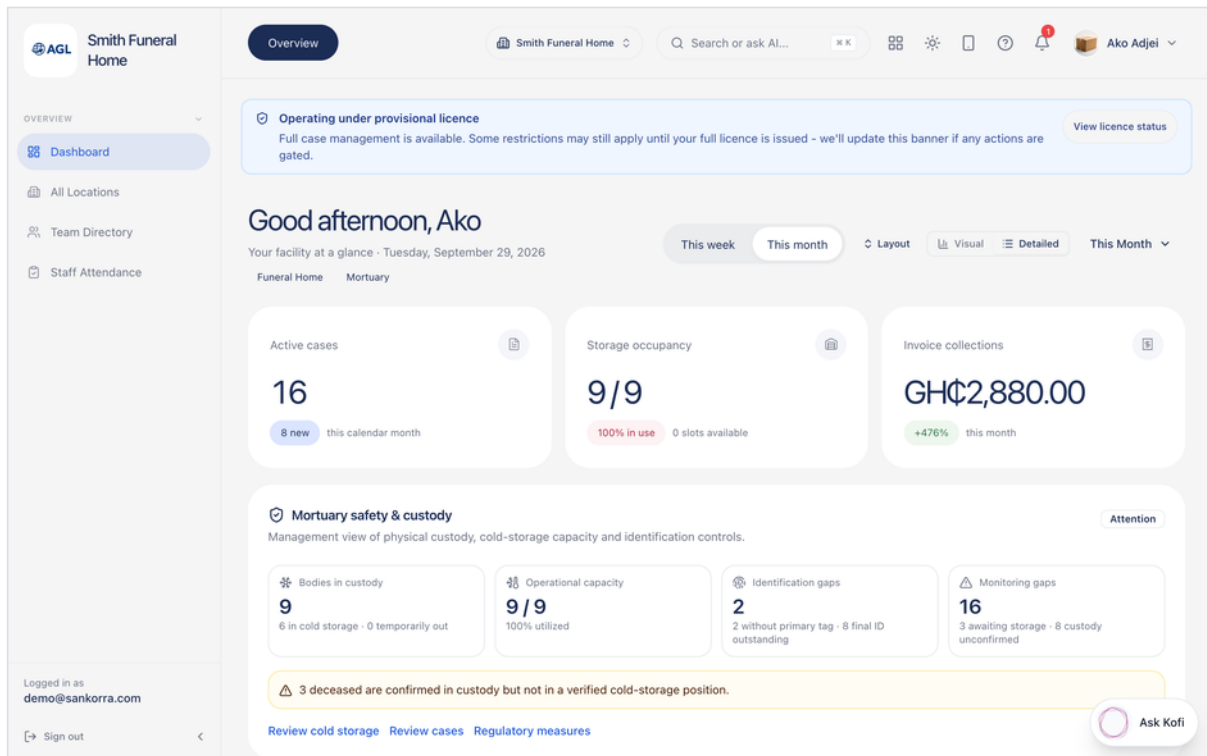
moving between two or more facilities that you work at, or between the branches of one business.

HOW TO GET HERE

Top bar → the rounded button showing your facility's name.

WHAT YOU SEE ON THE SCREEN

- **Switch dashboard** — the heading of the list.
- **All Locations** — opens the group overview (see section 2.2). Only shown when your facility belongs to a group.
- Each group's name, with its branches listed underneath. Each branch line shows the branch name and, beneath it, either your role there or "Organization only · no dashboard access".
- **Practitioner dashboard** — only if you are a registered practitioner. It opens the separate practitioner portal.
- Any other facilities you belong to that are not part of a group, with your role at each.
- A tick beside the one you are in now.



The workplace switcher open, listing the group's branches with the current one ticked

WHAT YOU CAN DO HERE

To switch to another location:

- 1 Press the rounded button in the top bar showing your facility's name.
- 2 Press the branch or facility you want.
- 3 The page reloads on that facility's dashboard. Your choice is remembered, so you land there next time too.

Good to know

- The button does not appear at all if you only belong to one facility and are not a practitioner. That is normal.
- A branch shown as "Organization only · no dashboard access" cannot be pressed. Group-level access lets an owner see totals but does not let them work inside that branch. Ask that branch's administrator for access.
- Each branch keeps its own cases, storage, invoices and staff. Nothing you do in one branch appears in another.

1.8 Why two people see different menus

WHAT THIS SCREEN IS FOR

explaining why a colleague's dashboard does not look like yours, so you do not waste time hunting for a page that is not yours to see.

HOW TO GET HERE

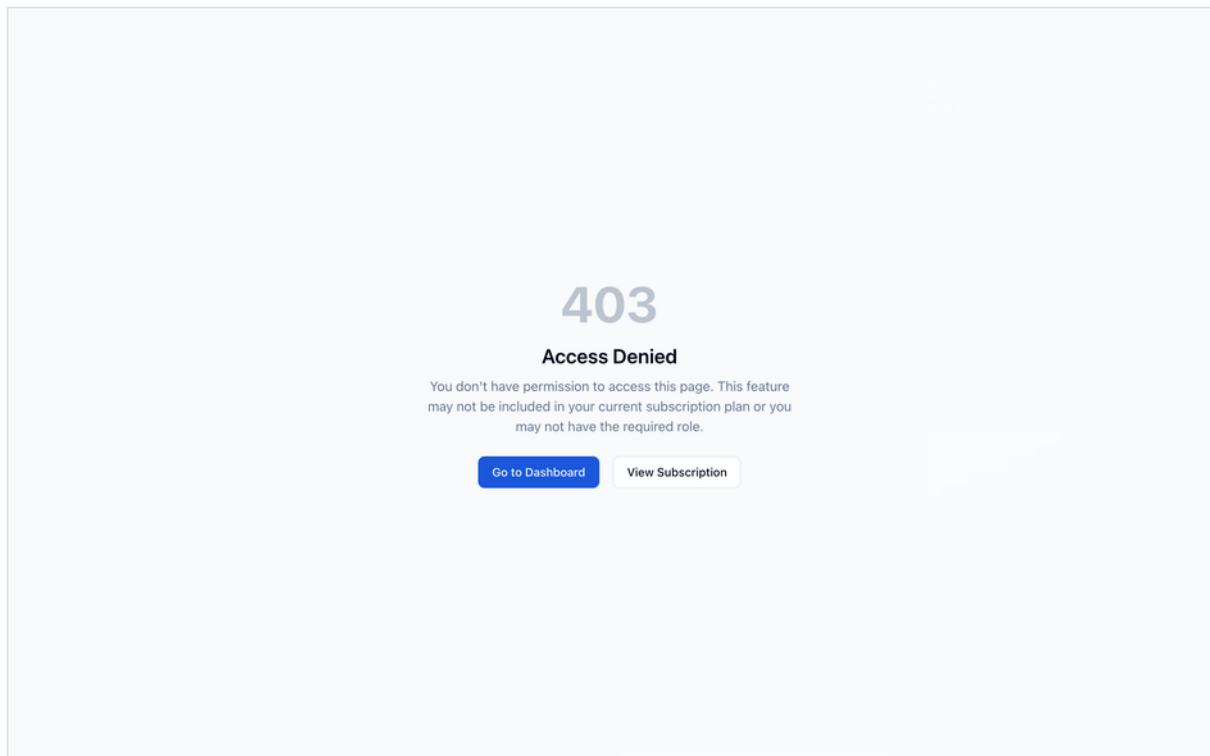
There is no page for this. Read it once, and keep it in mind whenever a colleague says they cannot find something you can see.

WHAT YOU SEE ON THE SCREEN

Four separate things decide what you see.

What decides it	What it changes
Your role	Whether whole sections appear at all
Your permissions	Individual pages and buttons
Your plan	Whether a feature is included
Your facility types	Which operational areas exist

- **Your role** is shown under your name in the user menu: owner, administrator, manager, staff or viewer. **ADMINISTRATION** and **CONFIGURATION**, and the **All Locations** line, are for owners and administrators only.
- **Your permissions** are set by an owner or administrator against your role. They control finer things — for example, **Staff Attendance** only appears if you are allowed to view staff attendance.
- **Your plan** is your facility's Sankorra subscription. If a page is not in your plan you see **... Not Available** with the line "This feature is not included in your current subscription plan" and a link to upgrade.
- **Your facility types** are the kinds of work your facility is licensed for — funeral home, chapel, cemetery, columbarium, mausoleum, crematorium, mortuary. If a page needs a type you do not have, you see **... Not Enabled**, the list of types it belongs to, and a link to request a change.
- Your administrator can also switch whole pieces off in the **Download Center**. A switched-off piece disappears from the menu entirely.



The "Access Restricted" panel explaining that a page is for owners and administrators only

WHAT YOU CAN DO HERE

To find out why you cannot see something:

- 1 Look for the page in the left menu. If it is not there, it is not yours to open.
- 2 If you reached it another way and see **Access Restricted**, read which roles it is for — the panel also names your current role.
- 3 If you see ... **Not Available**, it is a plan matter. Your administrator can upgrade.
- 4 If you see ... **Not Enabled**, it is a facility-type matter. Your administrator can request the change.
- 5 Otherwise ask your administrator to check your role's permissions.

Good to know

- Money is treated carefully. If your role is not allowed to view reports, the revenue and overdue-invoice parts of the dashboard are not merely hidden — the figures are never fetched to your computer at all.
- Cause of death on a case is only shown to owners and administrators.
- Changing a role's permissions takes effect the next time the person loads the dashboard. Ask them to refresh the page.

CHAPTER 2

Your dashboard and your people

2.1 Dashboard

WHAT THIS SCREEN IS FOR

your morning read of the whole facility: how many cases are live, how full your storage is, what money has come in, who is on the team, and what needs attention today.

HOW TO GET HERE

Sidebar → Overview → Dashboard. It is also the page you land on when you sign in.

WHAT YOU SEE ON THE SCREEN

The greeting strip at the top. "Good morning", "Good afternoon" or "Good evening" with your first name, then "Your facility at a glance" and today's date. Underneath are small grey labels for your facility types; if there are more than three, a **+2 more** label takes you to the facility-types page.

The tools on the right of that strip.

- **This week / This month** — two quick buttons.
- **Layout** — holds **Collapse all** and **Expand all**, which fold every panel on the page at once.
- **Visual / Detailed** — Visual draws dials and shaded charts, Detailed shows numbers, bars and tables. Your choice is saved for you.
- A period button showing the range in use. Pressing it offers **Today, Yesterday, Last 7 Days, Last 14 Days, Last 30 Days, This Week, Last Week, This Month, Last Month, This Quarter** and **This Year**. Everything below that counts money or activity follows this choice.

Three tiles across the top.

- **Active cases** — the number of cases still in progress, with "N new" for this calendar month underneath.
- **Storage occupancy** — used places out of total places, the percentage in use (green below 70%, amber from 70%, red from 90%) and how many places are free.
- **Invoice collections** — what you have actually collected on case invoices in the chosen period, with the change against the period before. If you are not allowed to see money, this tile is replaced by **Upcoming events** — how many things are scheduled in the next 60 days.

Mortuary safety & custody. A wide card with a badge reading **Stable, Attention** or **Critical**, and four counts:

- **Bodies in custody** — with how many are in cold storage and how many are temporarily out.
- **Operational capacity** — load out of working capacity, and either the percentage in use or how far over capacity you are.
- **Identification gaps** — how many are without a primary body tag and how many still have no final identification.

- **Monitoring gaps** — how many are awaiting storage and how many have unconfirmed custody.

Under the counts, a red line appears if cold-storage load is over working capacity, or an amber line if someone is in your custody but not in a verified cold-storage place.

Case Activity. A chart with **Active** and **Discharged** buttons. Under the chart, four small figures: the period total, the daily average, the busiest day, and this week's total with an up or down arrow against last week. On **Discharged** the four figures become the period total, the discharge rate, the average days to discharge, and how many are still active.

Operational priorities. A short list of links, each with a number:

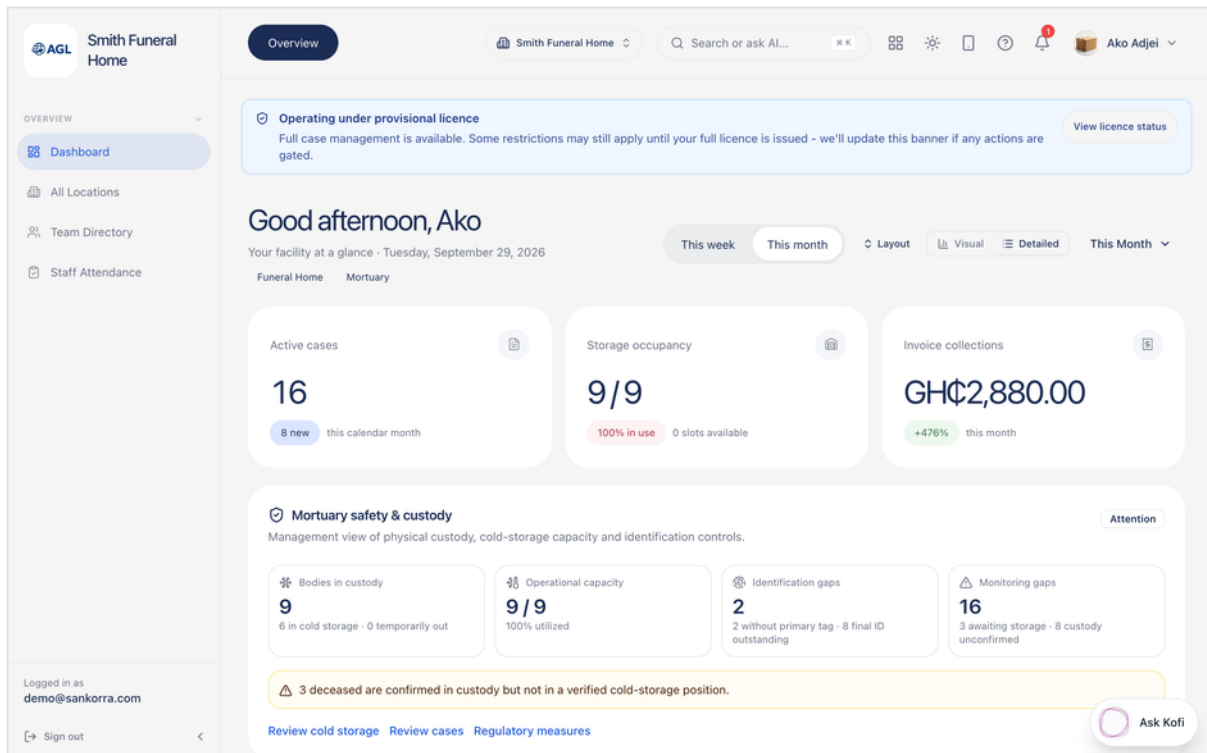
- **Overdue Payments** — "N invoices". Only shown if you may see money.
- **Storage Capacity** — "N% utilized".
- **Pending Processing** — "N cases".
- **Expiring Soon** — "N documents", only when documents expire within 30 days.
- **Today's Schedule** — "N events".

Recent Cases. The latest cases with their name, case reference, status and when they were last touched, and **View all cases**.

AI Insights. A small badge you press to open a panel of AI observations, each marked **Trend**, **Warning**, **Opportunity** or **Critical**, with a link to the page it concerns.

The lower panels, each with a small arrow to fold it away. When folded, the heading still shows a one-line summary.

- **Inspection Score** (or **Inspection Rating**) — a dial from 0 to 100, or five stars, with a wording such as "Not Inspected", the date of the last inspection, checklist items passed out of the total, open violations, and the next inspection date.
- **Invoice Collections** — with three tabs. **Collected** shows the total, how many days had collections, the best day and the average per active day. **Over Time** draws the trend. **Vs Previous** shows the percentage change and the previous period's total in words.
- **Storage Utilization** — the same occupancy figure as the tile, plus small coloured counts for **Occupied**, **Reserved**, **Maint.**, **Avail.** and **Out** when there are any. Pressing the card opens Storage Units.
- **Upcoming Schedule** — what is coming up. It starts folded when there is nothing on.
- **Team** — your active teammates and who is online right now.
- **Fleet Status** — vehicles by **Available**, **In Use**, **Reserved** and **Maintenance**. Starts folded.
- **Driver Pool** — drivers by **Available**, **Assigned**, **Off duty** and **Suspended**, plus a warning count of licences expiring within 30 days. Starts folded.
- **Cemetery Map** — your plots on a map, with a key. Starts folded.
- **Overdue Invoices** — the count and the total owed, and an ageing breakdown of **0-30 days**, **31-60 days** and **60+ days**. Starts folded, and is hidden altogether when nothing is overdue.



The dashboard showing the greeting, the three tiles, the mortuary safety card, Case Activity and Operational priorities

WHAT YOU CAN DO HERE

To change the period everything is measured over:

- 1 Press **This week** or **This month** for the two common choices.
- 2 Or press the period button and pick from the list.
- 3 The tiles, charts and money figures all follow your choice.

To make the page shorter:

- 1 Press **Layout**.
- 2 Press **Collapse all**. Each panel folds to one line with its summary.
- 3 Press **Layout** then **Expand all** to open them again.

To switch between pictures and numbers:

- 1 Press **Visual** for dials and shaded charts.
- 2 Press **Detailed** for numbers, bars and tables.

To act on what the dashboard is telling you:

- 1 **Storage occupancy at 90% or more, shown in red** — open **Storage Units** and free places, or arrange transfers out. Do this before the next intake.
- 2 **Mortuary safety badge reading Critical** — you are over working capacity. Review storage assignments, units marked unavailable, and whether anyone can be transferred or diverted. Do this today.
- 3 **"N deceased are confirmed in custody but not in a verified cold-storage position"** — open each case and put them in a place, or press **Assign cold storage** from the case.

- 4 Identification gaps above zero** — open those cases and record who identified the deceased. A case with nobody identifying it cannot be released.
- 5 Overdue Payments** — press it to open the overdue invoices and start chasing.
- 6 Expiring Soon** — press it to open Reports and find which documents are about to lapse.
- 7 Driver licences expiring** — open **Drivers** and get the licences renewed before the driver is stood down.
- 8 Inspection Score low, or open violations above zero** — open **Regulatory Measures** and close the open items.

Good to know

- Your own dashboard layout is saved to you, not to the facility. Two people at the same facility can have different panels showing.
- Which panels you may have at all is decided for you: the fleet panels need the hearse area, the cemetery map needs the cemetery area, and the two money panels need both the billing area and permission to view reports.
- Staff and viewer roles start with a leaner dashboard — **Inspection Score** and **Team** are hidden to begin with.
- Which panels appear, and in which column, is changed in Settings → **Dashboard Settings** by an administrator.
- "N online" on the **Team** panel means signed in and using the app in the last few minutes. It is not the same as being on duty — attendance lives on its own screen (section 2.4).
- **Invoice collections** counts money received against issued case invoices. It is not the same as invoiced totals.

2.2 All Locations

WHAT THIS SCREEN IS FOR

grouping separately licensed branches of one business under one name, and seeing their totals side by side, without mixing up their day-to-day work.

HOW TO GET HERE

Sidebar → Overview → All Locations.

WHAT YOU SEE ON THE SCREEN

If this facility is not yet part of a group, you see **Organization & Locations** with the message "This facility is currently standalone" and, if you are an administrator, a **Create organization** button.

Once a group exists, you see the group's name, the reminder that "Each branch keeps its own licence and isolated operational data", and:

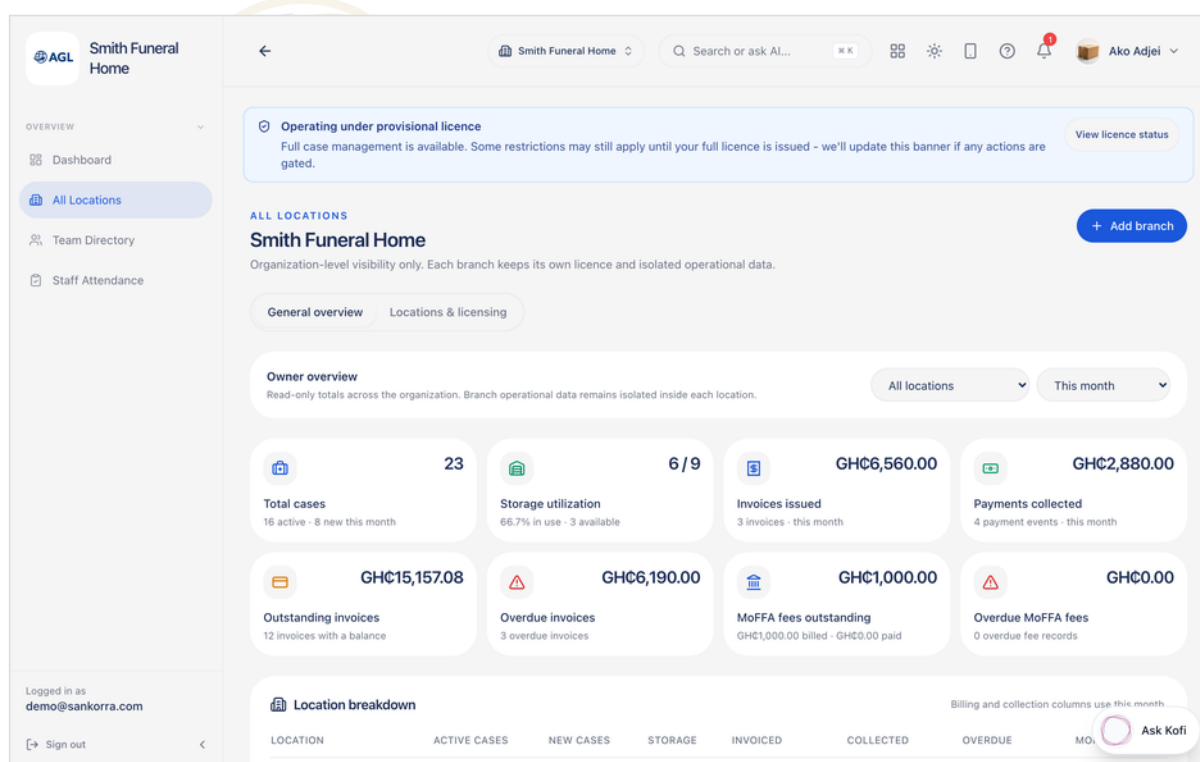
- A group chooser, if you belong to more than one group.
- **Add branch** — starts a licence application for a new branch.
- Two tabs: **General overview** and **Locations & licensing**.

On **Locations & licensing**:

- Five counts across the top — **Locations**, **Licensed**, **Provisional**, **Applications** still in progress, and **Suspended**.
- **Branch applications in progress**, when there are any. Each shows the branch name, where the application has reached (for example "Intake review", "Inspection pending", "Registrar review", "Board decision", "Provisional licence"), its application number, when it was submitted, and its town, district and region. Each has **Continue draft** or **View application** if you are the applicant, and **Open branch** if a facility already exists and you have access.
- **Locations** — every branch with its state (**Licensed**, **Provisional**, **Suspended** or **Under MoFFA review**), its town, district and region, its facility type, and **Open branch**.

On **General overview** (owners and group administrators only):

- **Owner overview** with a location filter (**All locations** or one branch) and a period filter (**This month**, **Last 30 days**, **Last 90 days**, **This year**, **All time**).
- Eight totals — **Total cases**, **Storage utilization**, **Invoices issued**, **Payments collected**, **Outstanding invoices**, **Overdue invoices**, **MoFFA fees outstanding** and **Overdue MoFFA fees**.
- **Location breakdown** — one row per branch with active cases, new cases, storage, invoiced, collected, overdue and MoFFA due.



The All Locations screen showing the branch counts, the locations list and the Open branch buttons

WHAT YOU CAN DO HERE

To create a group around this facility:

- 1 Press **Create organization**.
- 2 Type the **Organization name** — the business name, for example "Peace Funeral Services Ltd."

- 3 Type the **Current branch name** — what this location is called, for example "Accra Central".
- 4 Press **Create organization**. This facility becomes the group's first branch and keeps all its own information.

To add another branch:

- 1 Press **Add branch**.
- 2 Complete the licence application that opens.
- 3 The branch appears under **Branch applications in progress** until MOFFA decides.

To work inside a branch:

- 1 Press **Open branch** on its row.
- 2 The page reloads on that branch's own dashboard.

To read group totals:

- 1 Press **General overview**.
- 2 Choose **All locations** or one branch, and a period.
- 3 Read the totals, then the **Location breakdown** table underneath.

Good to know

- This screen is for owners and administrators only.
- **General overview** is only offered if you are an owner or administrator of the group itself, not merely of one branch.
- Group access does not give you access to a branch's day-to-day work. Where you see "Organization access does not grant operational dashboard access", ask that branch's administrator.
- Every branch is licensed separately by MOFFA. Grouping them does not share a licence, and does not merge their cases, storage or money.
- Money figures on **General overview** are shown per currency, so you may see two amounts joined by a dot.

2.3 Team Directory

WHAT THIS SCREEN IS FOR

a simple, everyone-can-see-it list of the people at your facility: staff and licensed practitioners, with their role, job title, department and Staff ID.

HOW TO GET HERE

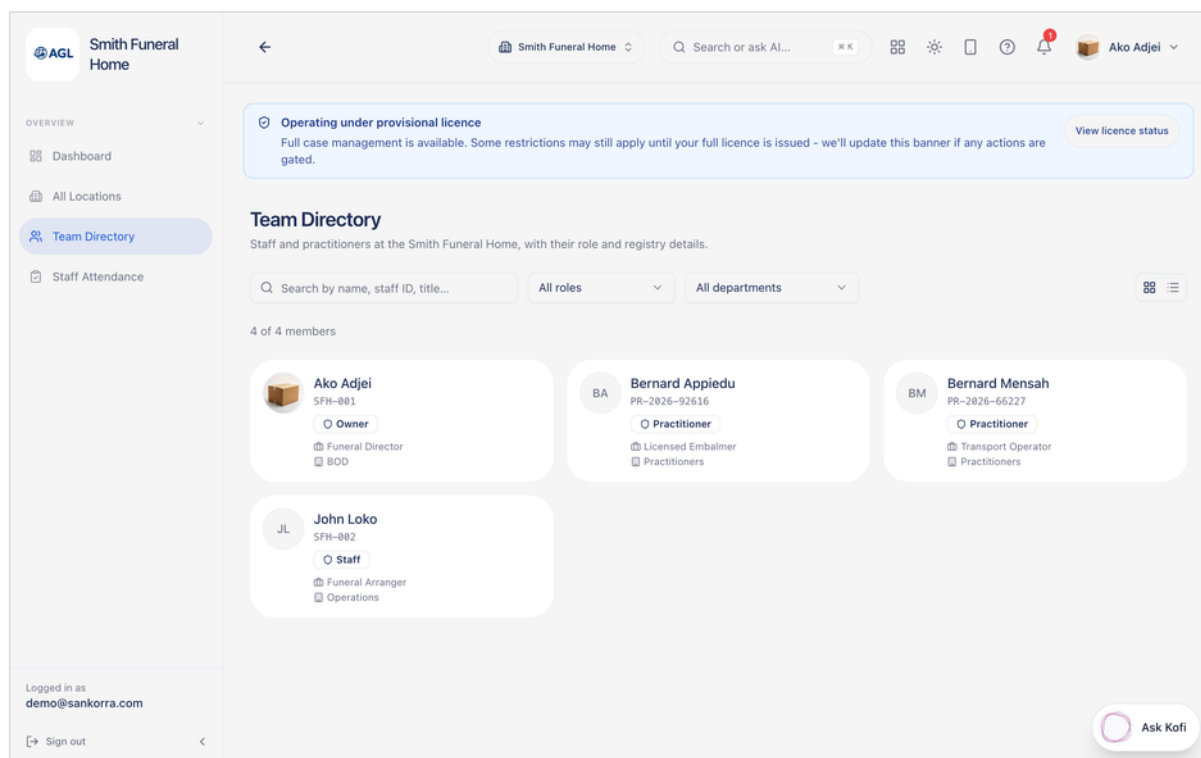
Sidebar → Overview → Team Directory.

WHAT YOU SEE ON THE SCREEN

- **Team Directory** with the line "Staff and practitioners at the [your facility], with their role and registry details."
- A search box — "Search by name, staff ID, title..."

- **All roles** — narrows to Owner, Admin, Manager, Staff or Viewer. Only the roles actually present are offered.
- **All departments** — only appears when somebody has a department recorded.
- **Clear** — appears once you have searched or filtered.
- Two small buttons on the right to switch between cards and a plain list.
- A count line: "12 of 20 members".
- Then the people. Each shows their picture or initials, their name, their Staff ID, a role label, and their job title and department if recorded.

Practitioners are labelled **Practitioner**, or **In charge** / **Lead** where they are the person in charge.



The Team Directory in card view showing several people with role badges and Staff IDs

WHAT YOU CAN DO HERE

To find somebody:

- 1 Type part of their name, Staff ID or job title in the search box.
- 2 Or choose their role or department from the two lists.
- 3 Press **Clear** to start again.

To change how the list looks:

- 1 Press the squares button for cards.
- 2 Press the lines button for a compact list.

Good to know

- This screen is read-only. Adding people, changing roles and issuing Staff IDs is done by an administrator on the Staff pages.
- A person with no name recorded shows their Staff ID instead, or "Unnamed member".
- Practitioners appear here even though they are registered separately from ordinary staff.

2.4 Staff Attendance

WHAT THIS SCREEN IS FOR

the day's attendance board: who signed in, who did not, who was late, and how the hours add up for payroll.

HOW TO GET HERE

Sidebar → Overview → Staff Attendance.

WHAT YOU SEE ON THE SCREEN

- **Staff attendance** with the line "Who signed in today, who's still out, and how late arrivals affected the day."
- A **date** box at the top right, starting on today.
- **My attendance** — your own last 60 days.
- **Settings** — only if you are allowed to manage attendance.
- Four counts: **Signed in**, **Late**, **Not signed in** and **Absent (marked)**.
- A table with one row per active staff member, whether they signed in or not: **Staff**, **Signed in**, **Signed out**, **Late**, **Worked**, **OT / UT** and **On site**.
- **Late** shows the minutes late in amber, **on time** in green, **absent** in red, or a dash if they have not signed in.
- **OT / UT** shows overtime with a plus in green, or undertime with a minus in amber.
- **On site** shows **on site** or **off site** when your facility checks location, and a dash when it does not.
- **Monthly export** at the bottom, with a month box and **Export CSV**. It explains itself: "One row per staff for payroll - days present/late/absent, worked hours, over/undertime, late minutes."

The **clock-in pill** in the top bar is the other half of this screen. It reads **Clock in** before you have signed in, then **In · 07:42**, then **Out · 15:04**.

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Overview > **Staff attendance** 29.09.2026 My attendance Settings

Who signed in today, who's still out, and how late arrivals affected the day.

Signed in: 0 Late: 0 Not signed in: 2 Absent (marked): 2

Staff	Signed in	Signed out	Late	Worked	OT / UT	On site
Ako Adjei	-	-	absent	-	-	-
John Loko	-	-	absent	-	-	-

Monthly export
One row per staff for payroll - days present/late/absent, worked hours, over/undertime, late minutes. September 2026 [Export CSV](#)

Logged in as **demo@sankorra.com** [Sign out](#) [Ask Kofi](#)

The attendance board showing the four counts and the staff table with late and overtime columns

WHAT YOU CAN DO HERE

To clock yourself in:

- 1 Press the **Clock in** pill in the top bar.
- 2 Read the panel. It shows your working day, how long until it starts or ends, and — if your facility checks location — that your location will be compared with the facility's boundary.
- 3 Press **Yes, clock in**.

To clock yourself out:

- 1 Press the pill, which now reads **In** and your sign-in time.
- 2 Check the panel: it shows when you signed in, how long you have been on the clock, and how long is left in the day.
- 3 Press **Yes, clock out**.

To review another day:

- 1 Change the **date** box at the top right.
- 2 The four counts and the table follow the date you chose.

To look at one person's history:

- 1 Press their name in the **Staff** column.
- 2 Their own attendance screen opens, showing their last 60 days with days present, hours worked, overtime and undertime.

To produce the payroll file:

- 1 Choose the month in the month box beside **Monthly export**.

2 Press **Export CSV**.

3 The file downloads to your computer. Open it in a spreadsheet.

Good to know

- This screen only appears if your facility uses Punchbook and you are allowed to view staff attendance. Without that permission you see a note telling you which permission you need.
- **Settings** — working hours, lateness and the location boundary — is only for people allowed to manage attendance.
- You can only clock out once a day. The panel warns you: make sure you are finished for the day.
- Times are shown in your facility's time zone, not your phone's.
- **Not signed in** is not the same as **Absent (marked)**. The first simply means nothing was recorded; the second means somebody marked them absent.



CHAPTER 3

Cases and daily case work

A case is the complete story of one deceased person in your care, from the first phone call to the moment the family takes them away. Everything else in this chapter feeds into a case or hangs off one.

The usual journey is:

- 1 The family calls. You log a **Removal** and send a driver — or a hospital sends an **Inbound Transfer**, or the police file an **Incident Report**.
- 2 The deceased arrives. You **confirm the body received**, put them in cold storage, and **issue a body tag**.
- 3 You open a **case**, record the deceased and the family contacts, and add the **services** the family has chosen.
- 4 Somebody who knew the deceased **identifies** them.
- 5 You collect the **documents**, complete the **release checklist**, and clear the balance.
- 6 You **release** the deceased to the family and close the case.

3.1 Cases (Records of Care)

WHAT THIS SCREEN IS FOR

the list of every case at your facility, and the door to each one.

HOW TO GET HERE

Sidebar → Case Management → Cases (Records of Care).

WHAT YOU SEE ON THE SCREEN

- **Cases (Records of Care)** with the line "Manage funeral cases and deceased records", and two buttons: **Quick Add** and **New Case**.
- Three view buttons: **Active Cases**, **Discharged** and **Archived**.
- A filter row: a search box ("Search by name or case number..."), **Status**, **Priority** and a **Date** range. On the right sit a saved-views button, a columns button and **Export**.
- The table itself. Which columns show is up to you; the full set is **Case #**, **Deceased**, **Client**, **Status**, **Checklist**, **Priority**, **Date of Death**, **Discharge Date**, **Balance** and **Created**.
- **Status** is the stage the case has reached in your facility's workflow, in its own colour.
- **Checklist** is the release checklist at a glance: a green tick and "7/7" when everything is done, an amber warning and "4/7" when required items are still open, or **Override** when a supervisor released it with items outstanding.
- **Balance** is shown in red when money is still owed and green when it is clear.
- Page arrows at the bottom. Twenty cases show at a time.
- On **Active Cases** each row has a tick box. Ticking any row opens a bar with **Archive** and **Export**.

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Cases (Records of Care)
Manage funeral cases and deceased records

[Quick Add](#) [+ New Case](#)

[Active Cases](#) [Discharged](#) [Archived](#)

Search by name or case num Status Priority Date Views Columns (10) [Export](#)

CASE #	DECEASED	CLIENT	STATUS	CHECKLIST	PRIORITY	DATE OF DEATH	DISCHARGE DATE	BALANCE	CREATED
SFH-26-1028	Emma Amo	Bill Amo	Preparation	0/5	NORMAL	Sep 28, 2026	Oct 26, 2026	GHC960.00	Sep 28, 2026
SFH-26-1027	Peace Amo	Bill Amo	Preparation	5/5	NORMAL	Sep 26, 2026	Oct 26, 2026	GHC0.00	Sep 26, 2026
SFH-26-1025	Kofi Mensah	Adu Antwi	Preparation	0/3	NORMAL	Sep 15, 2026	Sep 23, 2026	GHC0.00	Sep 15, 2026
SFH-26-1024	Kofi Mensah	Adu Antwi	Body Receiving	-	NORMAL	Sep 15, 2026	Sep 23, 2026	GHC0.00	Sep 15, 2026
SFH-26-1023	Kofi Dela Sr	-	Body Receiving	-	URGENT	Sep 10, 2026	-	GHC0.00	Sep 10, 2026

Logged in as demo@sankorra.com [Sign out](#)

[Ask Kofi](#)

The cases list showing several cases with status, checklist and balance columns

WHAT YOU CAN DO HERE

To find a case:

- 1 Type the deceased's name or the case number in the search box.
- 2 Or narrow by **Status**, **Priority** or a **Date** range.
- 3 Press the row to open the case.

To see cases that are finished or put away:

- 1 Press **Discharged** for cases that have reached their final stage.
- 2 Press **Archived** for cases you have archived.

To restore an archived case:

- 1 Press **Archived**.
- 2 Press **Restore** at the end of the row.
- 3 Read the panel — it shows why the case was archived — and confirm.

To archive several cases at once:

- 1 Press **Active Cases**.
- 2 Tick each case you want.
- 3 Press **Archive** in the bar that appears.
- 4 Type a reason and confirm.

To export what you are looking at:

- 1 Set your filters so the list shows what you want.

- 2 Press **Export**. The file downloads with the columns you have on show.
- 3 Or tick particular rows and press **Export** in the bar instead.

To choose your columns:

- 1 Press the columns button in the filter row.
- 2 Turn columns on or off, or reorder them.
- 3 Your choice is saved to you on this screen.

To save a set of filters you use often:

- 1 Set the filters.
- 2 Press the saved-views button and save the view with a name.
- 3 You can mark one as your default, pin it, share it with the facility, or delete it later.

Good to know

- **Quick Add** and **New Case** are greyed out when your facility's licence is only pending or is suspended. Rest on the button to read why.
- You only see these buttons at all if your role may create cases.
- Deleting a case moves it to the Recycle Bin, where an owner or administrator can restore it until it is finally purged. Archiving is different: it keeps the case but takes it out of the active list.
- **Checklist** is worth watching. A case that cannot show a complete checklist cannot be released.

3.2 Taking in a new case

WHAT THIS SCREEN IS FOR

the five-step form that opens a case: who is paying, who has died, who the family contact is, what the family wants, and a last read-through before you commit.

HOW TO GET HERE

Sidebar → Case Management → Cases (Records of Care) → **New Case**.

WHAT YOU SEE ON THE SCREEN

A row of five numbered steps across the top, and "Step 2 of 5: Deceased Information" underneath so you always know where you are.

Step 1 — Client. "Every case must be linked to a registered client - the individual or organization bringing in this case." A search box finds an existing client by name or phone; a button at the bottom of the results registers a new one. Once chosen, a green box confirms the name and phone.

Step 2 — Deceased Information. **First Name** and **Last Name** are required. Then **Other Names**, **Gender** (Male, Female, Other), **Date of Birth**, **Date of Death**, an age box filled in for you from those two dates, **Religion**, **Place of Death** ("Hospital, home, etc."), **Residence / Home Address** and **Cause of Death**.

Step 3 — Primary Contact. First Name, Last Name, Relationship, and Phone Number are all required. **Email** and an address box that suggests addresses as you type are optional. If the client you chose is a person, their name and phone are copied in here for you; change them if the family contact is somebody else.

Step 4 — Service & Documents.

- **Case Type** — **At-Need** (the person has already died), **Pre-Need** (arranging while alive) or **Transfer** (part-arranged elsewhere). At-Need is the normal choice.
- **Service Type** and **Priority**, both from your facility's own lists.
- A workflow chooser, with **Use default workflow** as the normal choice.
- **Planned Discharge Date**.
- **Burial Date** and **Burial Location** — leave these empty if the family has not decided; you can ask them for it later (see section 3.3).
- A deposit amount, if you hold a deposit against the family providing burial details.
- **Notes**.
- **Attach Documents (Optional)** — choose a document type, then drag files in or pick them. Each waiting file can be previewed or removed before you commit.
- A place for the client to sign on screen.

Step 5 — Review & Create. Everything you typed, laid out for checking, with the client, the deceased, the contact, the service details and the signature.

At the bottom sit **Back**, **Next** and, on the last step, the button that creates the case.

The screenshot displays the 'Create New Case' form in the Sankorra system. The interface includes a sidebar with 'CASE MANAGEMENT' options like 'Cases (Records of ...)', 'Removals', 'Inbound Transfers', 'Incident Reports', 'Post-mortem Inbox', 'Clearances', 'Evidence Holds', 'Clients', 'Schedule', and 'Transfers'. The top navigation bar shows 'Smith Funeral Home' and a search bar. A banner at the top states 'Operating under provisional licence'. The main content area is titled 'Create New Case' and includes a sub-header 'Step 1 of 2 - Register or Select Client'. It contains a text input field for 'Search by name or phone...' and buttons for 'Cancel' and 'Continue to Case Details'. A bottom bar shows the user is logged in as 'demo@sankorra.com' and includes an 'Ask Kofi' button.

Step 2 of the New Case form showing the step bar and the deceased's details

The screenshot displays the 'Create New Case' interface in the Sankorra Facility Dashboard. On the left, a sidebar lists 'CASE MANAGEMENT' options: Cases (Records of ... 16), Removals, Inbound Transfers, Incident Reports, Post-mortem Inbox, Clearances, Evidence Holds, Clients, Schedule, and Transfers. The main content area features a 'Create New Case' form. At the top of the form, a banner states 'Operating under provisional licence' with a 'View licence status' link. Below this, the form is titled 'Create New Case' and includes a sub-header 'Step 1 of 2 - Register or Select Client'. A message states: 'Every case must be linked to a registered client. Search for an existing client or register a new one before filling in the case details.' A search bar with the placeholder 'Search by name or phone...' is provided. At the bottom of the form, there are 'Cancel' and 'Continue to Case Details' buttons. The user is logged in as 'demo@sankorra.com' and an 'Ask Kofi' button is visible in the bottom right corner.

Step 5, Review and Create, showing the client, deceased, contact and service summary

WHAT YOU CAN DO HERE

To open a case from the beginning:

- 1 Press **New Case**.
- 2 On **Client**, search for the family or organisation bringing the case in. If they are new, register them from the bottom of the search results.
- 3 Press **Next**.
- 4 Fill in the deceased's **First Name** and **Last Name** at least, then as much of the rest as you know.
- 5 Press **Next**.
- 6 Fill in the family contact's name, **Relationship** and **Phone Number**.
- 7 Press **Next**.
- 8 Choose the **Case Type**, **Service Type** and **Priority**. Set a **Planned Discharge Date** if you have one.
- 9 Attach the death certificate and anything else the family brought.
- 10 Ask the client to sign on the screen if your facility takes a signature at intake.
- 11 Press **Next**.
- 12 Read the summary from top to bottom.
- 13 Press the create button.
- 14 The case opens. A panel reminds you to issue a body tag — see section 3.15.

To add a case in a hurry:

- 1 Press **Quick Add** on the cases list.

- 2 Type the deceased's **First Name** and **Last Name**.
- 3 Choose a **Priority**.
- 4 Add the contact's name, phone and relationship if you have them.
- 5 Press **Create Case**. You can fill the rest in afterwards.

Good to know

- You cannot move past **Client** without choosing one. This is deliberate: without a client there is nobody to bill.
- A **Date of Death** before the **Date of Birth**, or either in the future, is refused with a message under the box.
- **Burial Date** and **Planned Discharge Date** cannot be in the past.
- Each attached file must be 10 MB or smaller, and of a supported type. Files are only uploaded once you create the case.
- Documents, the signature and the contact are saved after the case itself. If one of them fails you are told, and the case still exists — add the missing piece from the case screen.
- If your facility's licence is only pending, this form is replaced by

Licence required: "Case management opens once MOFFA issues your licence. In the meantime you can configure services, invite staff, and prepare your facility." If it is suspended you see **Licence suspended** instead.

3.3 The case screen — Overview

WHAT THIS SCREEN IS FOR

everything about one case in one place, with the safety controls at the top where you cannot miss them.

HOW TO GET HERE

Sidebar → Case Management → Cases (Records of Care) → press the case.

WHAT YOU SEE ON THE SCREEN

At the very top: **Cases** > [**case number**], then the deceased's name as the heading, with their stage, their priority and the case number beside it. To the right sit **AI Summary**, **Report**, **Edit**, **Transfer**, **Archive** and **Delete**.

Then a row of tabs: **Overview**, **Contacts**, **Services**, **Funeral Details**, **Transport**, **Documents**, **Personal effects**, **Billing**, **Messages**, **Timeline** and **Special Instructions**.

On **Overview**, in order down the page:

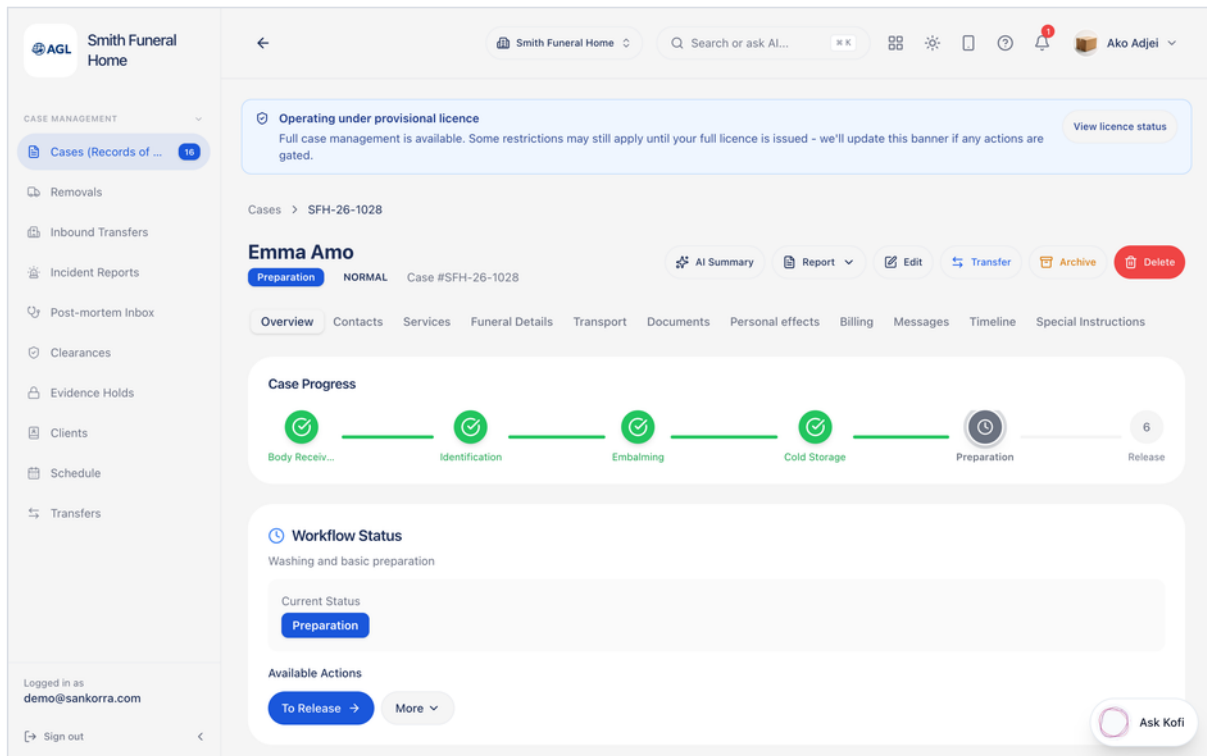
- A slim suggestion strip if a cemetery plot reservation seems to match this family, with **Link reservation**.
- **Case Progress** — the stages of the workflow with the current one marked.
- **Workflow Status** — the current stage, the SLA due date if there is one, and the buttons that move the case on. See section 3.16.
- **Custody & cold storage** — where the body physically is. See below.

- **Identification & release safeguards** — two cards side by side: **Identification** and **Identification photograph**.
- **Serious Incident** — with **Report missing deceased**.
- **Release Checklist**.
- **Storage Location, Assigned Staff** and **Body Tag**.
- **Post-mortem**, when the case came in from a hospital pathologist: the examiner, the manner of death, the cause of death in the standard Ia / Ib / Ic / II lines, **Toxicology pending** or **Histology pending** labels, and who signed with their licence number and signature.
- **Deceased Information** — full name, gender, date of birth, date of death, age, religion, place of death, residence, and cause of death (owners and administrators only).
- **Service Details** — case type, service type, priority, planned discharge, and the **Final Disposition** block.
- **Financial Summary** — **Total Amount**, **Paid Amount**, **Balance Due**, and any burial-information deposit marked **Held**, **Refund pending** or **Refunded**.
- **Case Information** — case number, status, created and last updated.
- **Additional Information** — anything extra your facility added to the case form.

Custody & cold storage shows one of these, and it is not the same thing as the workflow stage:

What it says	What it means
Arrival not confirmed	Nobody has confirmed the body is here
Received · awaiting cold storage	Here, but not in a verified cold place
In cold storage	In a tracked unit and compartment
Temporarily out of storage	Still yours, out of the cold for now
In transfer	Moving between facilities
Released	Handed to the family
Transferred out	Gone to another facility

Final Disposition carries one of three labels: **Submitted by family**, **Set by facility**, or **Pending from family**, with **Burial Date** and **Burial Location** underneath.



The case Overview tab showing Case Progress, Workflow Status, Custody and cold storage, and the Identification cards

WHAT YOU CAN DO HERE

To confirm the deceased has physically arrived:

- 1 Find **Custody & cold storage**. It reads "Physical arrival is not confirmed" with the reminder that "A case record alone is not treated as proof that the deceased is physically at this facility."
- 2 Make sure staff actually have the body.
- 3 Press **Confirm body received**.
- 4 The card changes to "Received · awaiting cold storage".
- 5 Press **Assign cold storage** and put them in a unit and compartment.

To record who identified the deceased:

- 1 Find the **Identification** card. If nobody has, it says so in red: "The case cannot be released until someone who knew [name] confirms it is them."
- 2 Press **Record**.
- 3 Choose the person from the case's contacts, or type their **Full name** and **Relationship to the deceased**.
- 4 Choose how it was done: **The family viewed the body, Body tag scanned and matched, Identification photograph, Documents only, Forensic (dental, DNA, fingerprints) or Other**.
- 5 Add their ID — **Ghana Card, Passport, Voter ID, Driver's licence, NHIS card or Other** — and the number, if they have it.
- 6 Add their phone and any notes.
- 7 Save. The card turns green with their name and relationship.

To record that nobody can identify the body:

- 1 On the **Identification** card, press **Nobody can identify this body**. This is only offered to an owner.
- 2 Choose why: **The body is unidentified, No next of kin can be found, Court or police order, Public health direction, Transferring to another facility** or **Other**.
- 3 Explain what happened in full.
- 4 Type your own password to confirm.
- 5 Save. The card shows **Released without one** in amber, and the regulator is notified.

To withdraw an identification you now doubt:

- 1 Press the small person-with-a-cross button on the **Identification** card.
- 2 Type why — for example "the family says this is not him".
- 3 Confirm. The case is blocked from release again, and the withdrawal stays on the case timeline.

To ask the family for the burial date and place:

- 1 Find **Final Disposition** under **Service Details**.
- 2 Press **Send Link**. A secure link goes by text message to the case's primary contact.
- 3 Watch the status line underneath — it shows the request state and whether delivery succeeded.
- 4 If there is no text-message route, the link is copied to your clipboard instead and you are told so. Send it yourself by WhatsApp or email.
- 5 Press **Resend Link** if the family has not replied.
- 6 Press **Copy Link** at any time to copy the link.

To fill the burial details in yourself:

- 1 Press **Override** beside **Final Disposition**.
- 2 Type the **Burial Date** and **Burial Location**. Both are required.
- 3 Add an **Override Note** saying where the information came from — for example "phone call" or "signed paper form".
- 4 Press **Save Override**. The note is added to the case notes for the record.

To assign a member of staff to the case:

- 1 Find **Assigned Staff**.
- 2 Press **Assign Staff**, or **Change** if somebody is already assigned.
- 3 Choose the person and press **Save**.

To report a deceased person as missing:

- 1 Find **Serious Incident**.
- 2 Press **Report missing deceased**.

- 3** Fill in **Discovered missing** and **Immediate actions taken** — both are required. For example: "Search performed, access restricted, manager informed, CCTV preserved".
- 4** Add the last confirmed time present, the last known location, where the absence was noticed, who was on duty, and the police reference if you have reported it.
- 5** Submit. The incident goes to the regulator and the card turns red with **Incident active**.

To produce a written summary of the case:

- 1** Press **AI Summary** at the top.
- 2** Choose a **Summary Type** — **Brief**, **Detailed**, **Family Friendly** or **Internal/Handoff**.
- 3** Turn **Include Services** on or off.
- 4** Generate, then copy or download the result.

To produce the printed case report:

- 1** Press **Report** at the top.
- 2** Press **Preview PDF** to read it on screen, or **Download PDF** to save it.

To archive, delete or move the case elsewhere:

- 1** Press **Archive** to put the case away with a reason. It stays on the **Archived** list and can be restored.
- 2** Press **Delete** to send it to the Recycle Bin, where an owner or administrator can restore it until it is purged.
- 3** Press **Transfer** to hand the case to another facility — see section 3.28.

Good to know

- Custody is tracked separately from the workflow stage on purpose, so that renaming a workflow stage cannot hide how full your cold storage really is.
- Anyone in your custody but not in a verified cold-storage place still counts towards your regulatory capacity.
- If the regulator has restricted intake at your facility, **Confirm body received** is refused and an **Emergency intake override** panel opens. You must write at least 15 characters explaining why refusing or diverting this deceased is unsafe or impossible. Your reason, your name and the measure are written to the regulator's audit trail.
- **Reconcile historical status** on the custody card is only for old cases where the deceased left long ago and the release was never written down. It needs a reason of at least ten characters, and it is refused while storage records still show them as present. If the body is here now, use **Confirm body received** instead.
- **Edit**, **Transfer** and **Archive** disappear once a case is archived; a gold strip at the top offers **Restore Case** instead.
- **AI Summary** needs AI features to be switched on for your facility, and there is a monthly limit. You will be told plainly if either stops you.
- The **Identification photograph** card only appears if your facility has opted in to encrypted identification photographs, and each part of it needs its own permission to add, open or destroy.

3.4 Contacts tab

WHAT THIS SCREEN IS FOR

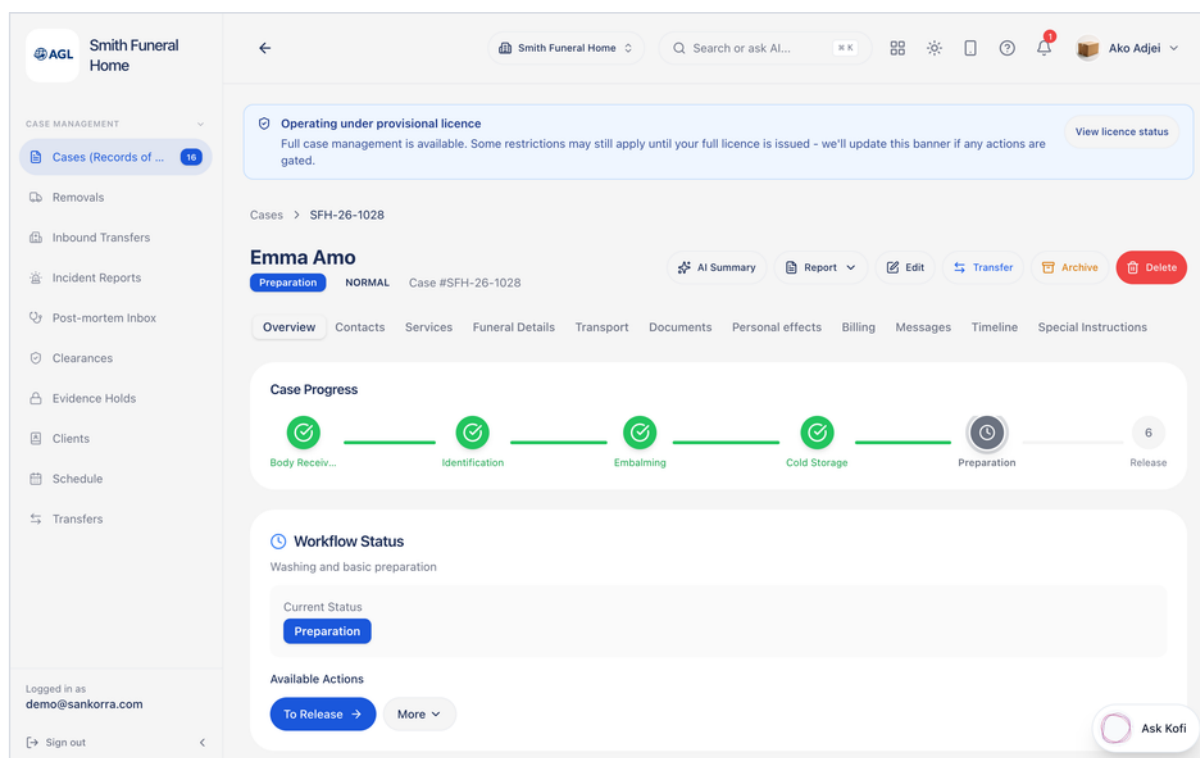
the family and next of kin for this case: who to ring, who gets the invoices, and who may collect the deceased.

HOW TO GET HERE

Cases → the case → **Contacts**.

WHAT YOU SEE ON THE SCREEN

- **Family & Next of Kin** with **Add Contact**.
- One card per person, showing their name, their relationship, their phone number and email as links you can press to call or write, and their address.
- Labels on the cards: **Primary** with a star, **Billing** with a card icon, and a label for their preferred way of being contacted.
- Three buttons on each card: a star to make them primary, a pencil to edit, and a bin to delete.



The Contacts tab showing a primary contact card with the Primary and Billing labels

WHAT YOU CAN DO HERE

To add a family contact:

- 1 Press **Add Contact**.
- 2 Fill in **First name** and **Last name**.
- 3 Choose their **Relationship**.
- 4 Add their **Phone** and **Email**.
- 5 Type the **Address** — suggestions appear as you type.

- 6** Choose their **Preferred contact method**, or leave it on the automatic setting, which follows whatever the family chose in the phone app.
- 7** Turn **Primary Contact** on for the main point of contact, and **Billing Contact** on for whoever receives invoices and payment requests.
- 8** Save.

To change who the primary contact is:

- 1** Press the star on the person who should be primary.

To correct or remove a contact:

- 1** Press the pencil to change their details.
- 2** Press the bin to remove them, then confirm. This cannot be undone.

Good to know

- A case must have a primary contact before it can be released. The primary contact is also who receives the release verification code.
- A case needs a billing contact before you can add services. If either is missing you are stopped with **Missing Case Contacts** when you try.
- Choose a specific contact method for a relative who is not on the phone app, so messages reach them by text or email instead.

3.5 Services tab

WHAT THIS SCREEN IS FOR

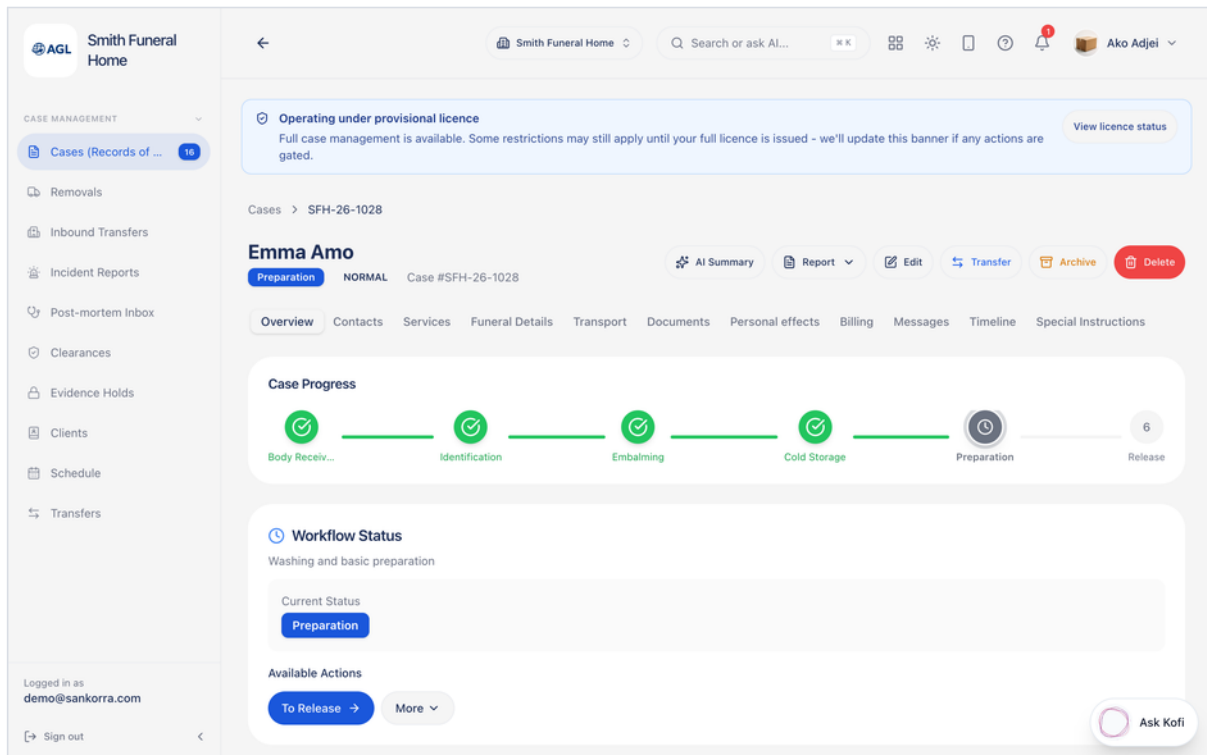
the things your facility is actually doing for this family, with their price, their date, who is doing them, and whether the family has consented.

HOW TO GET HERE

Cases → the case → **Services**.

WHAT YOU SEE ON THE SCREEN

- **Scheduled Services** with **Add Package** and **Add Service**.
- The services in three groups: **Active & Scheduled**, **Pending**, and **Completed & Cancelled**.
- Each service card shows its name, its category, its pricing tier and client type if any, its date and time, the member of staff assigned, its location, its notes, and its price with the quantity where it is charged by the hour, the day or the unit.
- A status label on the right: **Pending**, **Scheduled**, **In Progress**, **Completed** or **Cancelled**.
- Consent labels where consent is needed: **Consent Signed**, **Consent Pending**, **Manual Follow-up** or **Consent Declined**. A card awaiting consent has an amber border.
- For embalming, a small checklist of the documents required before the authorisation can be asked for, with ticks and crosses.
- A three-dots button on each unfinished service.



The Services tab showing service cards grouped by status with consent labels

WHAT YOU CAN DO HERE

To add one service:

- 1 Press **Add Service**.
- 2 Choose the service from your facility's catalogue.
- 3 Choose a **Pricing Tier** and **Client Type** if your facility uses them, or leave the standard pricing.
- 4 Set the **Date** and **Time**.
- 5 Type the **Location** — for example "Chapel A" or "Preparation Room 1".
- 6 Choose the **Assigned Staff**, or leave it unassigned.
- 7 Set the **Quantity** where the service is charged by the hour, day or unit.
- 8 Check the **price**, which is filled in from the catalogue.
- 9 Add **Notes**.
- 10 Save.

To add a whole package at once:

- 1 Press **Add Package**.
- 2 Choose the package. Every service in it is added to the case.

To move a service along:

- 1 Press the three dots on its card.
- 2 Press **Start Service** on a pending service.
- 3 Press **Mark Complete** when it is done.

To deal with consent:

- 1** Press the three dots and then **Request Consent**. A secure link goes to the family contact; you are told which route it went by and to whom.
- 2** Press **Resend Consent Request** if there is no reply.
- 3** Press **Copy Consent Link** to send the link yourself.
- 4** Or press **Capture Consent** to take the signature there and then, in front of the family, on the screen.

To cancel a service:

- 1** Press the three dots and then **Cancel Service**.
- 2** Type a reason. It is required, and it stays on the card.

Good to know

- You cannot add services until the case has both a primary contact and a billing contact. The message names which one is missing.
- Adding services creates a draft invoice for the case automatically. See section 3.10.
- For embalming, **Capture Consent** and **Request Consent** stay greyed out until the required documents are on the **Documents** tab. The checklist on the card tells you exactly which ones are missing.
- **Manual Follow-up** means there was no phone app, email or text route to the family contact. You must chase it yourself.
- A consent request is sent to the case's contact, so make sure their phone number and email are right on the **Contacts** tab first.

3.6 Funeral Details tab

WHAT THIS SCREEN IS FOR

the full shape of the funeral day: times at the house, the church and the cemetery, the wake, the dress code and the order of events — either filled in by you or collected from the family.

HOW TO GET HERE

Cases → the case → **Funeral Details**.

WHAT YOU SEE ON THE SCREEN

- **Funeral Details** with the line "Capture every detail of the funeral so the whole plan is clear."
- A line saying who last changed it, from where, and when.
- **Collect from the family by SMS** — with the state of any request, a note that the link goes to the case's primary contact, when the link expires, and a **Send funeral form** or **Resend link** button.
- The form itself: the burial date and funeral date, the day of the week, how many service days, the times at the house, the church and the cemetery, the addresses of each, the cemetery name, the officiant, the wake date and time, the repast location, the dress code, an itinerary you can add rows to, and notes.

- **Save Details** at the bottom.

The Funeral Details tab showing the SMS collection card and the funeral form

WHAT YOU CAN DO HERE

To ask the family to fill it in:

- 1 Press **Send funeral form**.
- 2 A secure link is created for the case's primary contact. If the text message goes out you are told who it went to. If there is no text-message route, the link is copied to your clipboard instead and you are told so — send it yourself by WhatsApp or email.
- 3 Watch the label beside "Collect from the family by SMS" for the state of the request, and the expiry time.
- 4 Press **Resend link** if nothing comes back.

To fill it in yourself:

- 1 Work down the form.
- 2 Add itinerary rows for each event, with the date, time, title, location and a description.
- 3 Press **Save Details**.

Good to know

- Your facility can change which boxes appear on this form, add its own, or make some required. If a box you expect is missing, ask your administrator.
- The line at the top tells you whether the family or a member of staff last changed the details, which settles most arguments about who typed what.

3.7 Transport tab

WHAT THIS SCREEN IS FOR

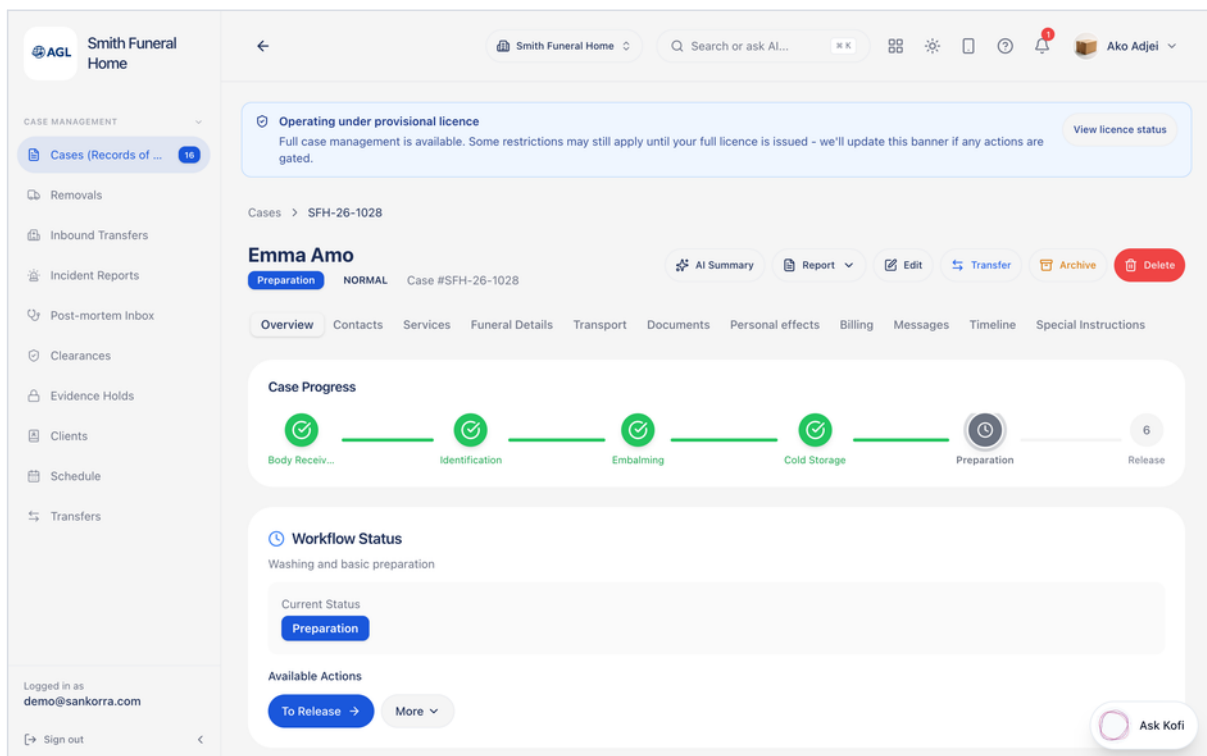
the journeys for this case, whether they use your own hearses or a partner facility's.

HOW TO GET HERE

Cases → the case → **Transport**.

WHAT YOU SEE ON THE SCREEN

- **Transport** with the line "Hearse and family-transport trips scheduled against this case, including requests sent to other facilities."
- **Request external hearse** and **Schedule transport**.
- **External requests** — any requests you have sent to other facilities, each with a way to cancel it.
- **Internal trips** — each trip showing the vehicle, its status, the kind of trip, the date and time, and the route from pickup to destination. Press a trip to open its full details.



The Transport tab showing an internal trip card with vehicle, status and route

WHAT YOU CAN DO HERE

To schedule a trip with your own fleet:

- 1 Press **Schedule transport**.
- 2 The case is already chosen for you. Fill in the rest and save.

To ask another facility for a hearse:

- 1 Press **Request external hearse**.
- 2 Complete the request and send it.

3 It appears under **External requests** until the other facility answers.

To cancel a request you have sent:

- 1** Find it under **External requests**.
- 2** Press the cancel button on its card.

Good to know

- The family's own timeline in the phone app picks these trips up automatically, whether the vehicle is yours or a partner's.

3.8 Documents tab

WHAT THIS SCREEN IS FOR

every piece of paper for this case: the death certificate, permits, consents, contracts and photographs.

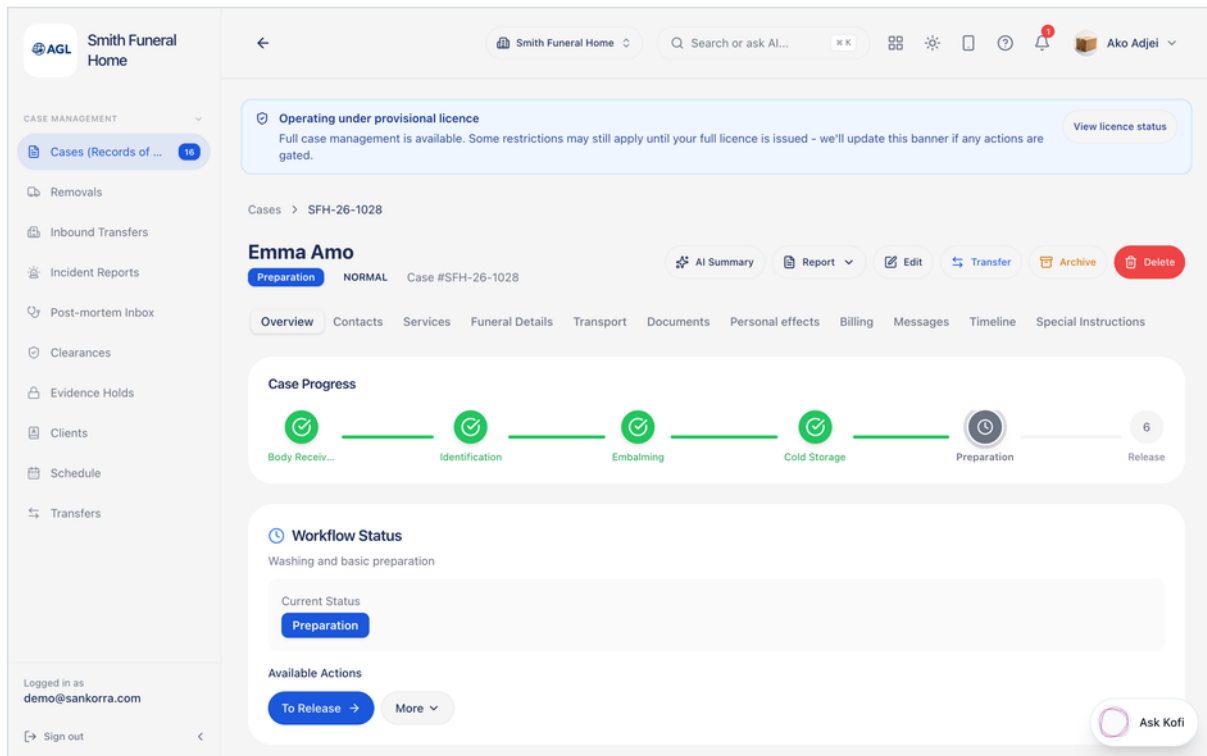
HOW TO GET HERE

Cases → the case → **Documents**.

WHAT YOU SEE ON THE SCREEN

- **Documents** with a count of files, and **Upload Document**.
- Two filters: document type, and status (**All Status, Pending, Verified, Rejected, Expired**).
- The list of files. Each shows its name, its type, its status and its date, with buttons to open it, download it, and — where allowed — verify or delete it.

Document types include **Death Certificate, Burial Permit, Cremation Permit, Transport Permit, Service Consent, Embalming Authorization, Autopsy Consent, Release Form, Service Contract, Photo, Identification, Passport, Medical Record, Insurance Document, Court Order** and **Other Document**.



The Documents tab listing uploaded files with their type and verification status

WHAT YOU CAN DO HERE

To upload a document:

- 1 Press **Upload Document**.
- 2 Choose the document type.
- 3 Choose the file and give it a name.
- 4 Upload.

To find one document among many:

- 1 Choose its type in the first filter.
- 2 Or choose **Pending** in the second filter to see what still needs checking.

To download a document:

- 1 Press the download button on its row. The file saves to your computer.

To mark a document as checked:

- 1 Press the verify button on its row. Its status becomes **Verified**.

To remove a document:

- 1 Press the delete button and confirm. This cannot be undone.

Good to know

- The verify buttons only appear if your facility has switched document verification on. Without it, documents simply sit there as uploads.
- Embalming cannot be authorised until the documents your facility has marked as required are here. The **Services** tab lists which are missing.

3.9 Personal effects tab

WHAT THIS SCREEN IS FOR

the rings, watches, clothing and wallets the family entrusted to you, photographed on the way in and tracked until they are handed back.

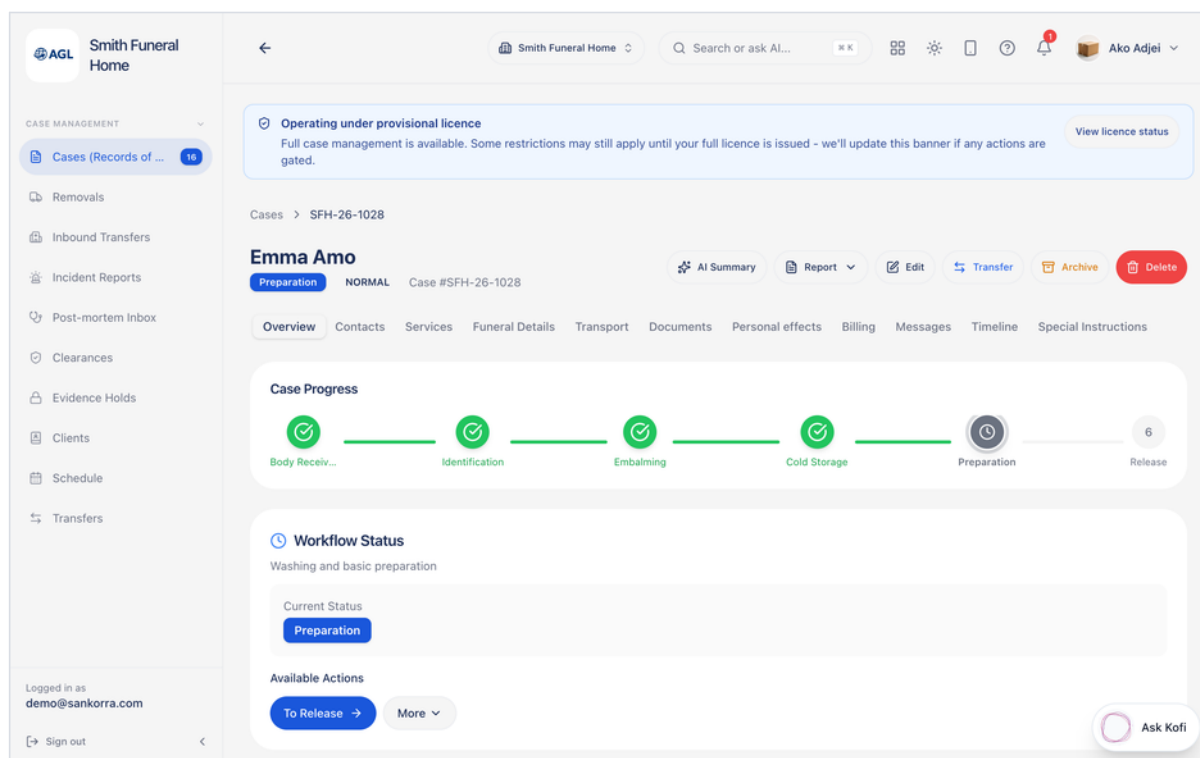
HOW TO GET HERE

Cases → the case → **Personal effects**.

WHAT YOU SEE ON THE SCREEN

- A count of items, and coloured counts for how many are **pending**, **returned** and **missing**.
- **Log item**.
- One card per item, with its first photograph, its type, its state, its quantity, the number of photographs, its description, its condition notes, and when it was logged.
- Where an item has gone back to the family, the card names who received it and their relationship.
- **Set disposition** on each card, and buttons to edit or delete it.

Item states are **Pending**, **With deceased**, **Returned to family**, **Retained as evidence** and **Missing on intake**.



The Personal effects tab showing item cards with photographs and disposition labels

WHAT YOU CAN DO HERE

To log an item on intake:

- 1 Press **Log item**.
- 2 Choose the **Item type** — Ring, Watch, Jewelry, Clothing, Shoes, Wallet, Phone, Keys, Glasses, Religious item or Other.
- 3 Set the **Quantity**.
- 4 Type a **Description**. This is required.
- 5 Add **Condition notes** — for example a scratch or a missing stone.
- 6 Add **Photos**. Photograph the item before you put it away.
- 7 Save.

To record what happened to an item:

- 1 Press **Set disposition** on its card.
- 2 Choose the state.
- 3 For **Returned to family**, type the name of the person who received it — this is required — and their relationship.
- 4 Add notes.
- 5 Save.

Good to know

- Photograph everything at intake, including anything already damaged. The photographs are what protect you and the family later.
- Record anything that was expected but not there as **Missing on intake** straight away, not later.

3.10 Billing tab

WHAT THIS SCREEN IS FOR

the money for this case: what it comes to, what has been paid, what is still owed, and the invoices behind those numbers.

HOW TO GET HERE

Cases → the case → **Billing**.

WHAT YOU SEE ON THE SCREEN

- **Invoices & Payments** with either **View Draft Invoice** or **Create Invoice**.
- Three figures: **Total Amount**, **Paid** in green, and **Balance Due** in red when money is owed and green when it is clear.
- A table of invoices: **Invoice #**, **Status**, **Issue Date**, **Due Date** and **Total**. Invoice numbers are links.

The screenshot shows the Sankorra interface for the Billing tab of case Emma Amo (Case #SFH-26-1028). The interface includes a sidebar with navigation options like Cases, Removals, Inbound Transfers, Incident Reports, Post-mortem Inbox, Clearances, Evidence Holds, Clients, Schedule, and Transfers. The main content area displays a banner for 'Operating under provisional licence', a progress bar for 'Case Progress' with steps: Body Receiv..., Identification, Embalming, Cold Storage, Preparation, and Release. Below this is a 'Workflow Status' section showing 'Current Status' as 'Preparation' and 'Available Actions' including 'To Release' and 'More'. The top navigation bar shows the user is logged in as 'demo@sankorra.com'.

The Billing tab showing the three money figures and the invoice table

WHAT YOU CAN DO HERE

To open the invoice the case already has:

- 1 Press **View Draft Invoice**. This appears whenever a draft invoice exists — which it does as soon as you add services.

To raise an invoice by hand:

- 1 Press **Create Invoice** and complete the form.

To open an invoice:

- 1 Press its **Invoice #** in the table.

Good to know

- Adding services to a case creates the draft invoice for you. You rarely need **Create Invoice**.
- A case cannot be released or discharged while its invoices still leave a balance outstanding. Settle it, or void what should not have been charged, before you try to release.

3.11 Messages tab

WHAT THIS SCREEN IS FOR

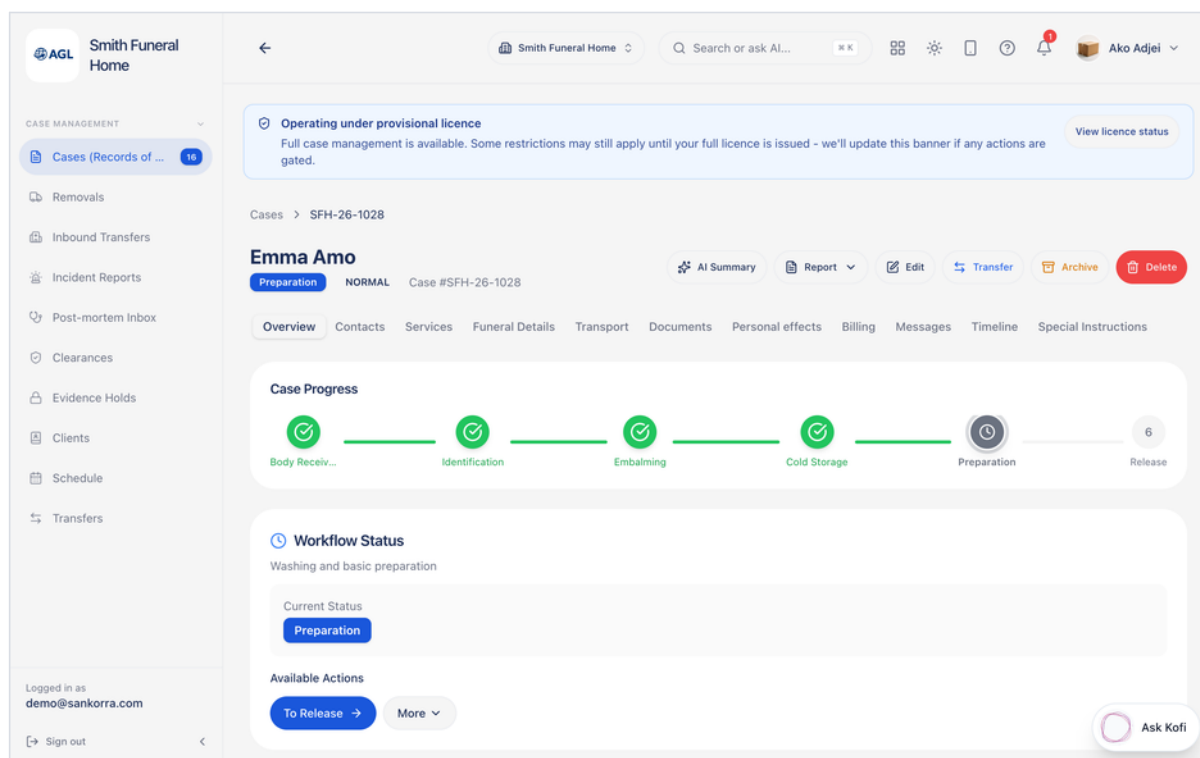
talking to the family in writing, in the case, so the whole team can see what has been said.

HOW TO GET HERE

Cases → the case → **Messages**.

WHAT YOU SEE ON THE SCREEN

A conversation. Messages from your facility sit on the right in your brand colour; the family's replies sit on the left in grey. Each carries its time, and the days are separated by small date labels. At the bottom is a typing box — "Write a message to the family..." — and a send button.



The Messages tab showing a conversation with the family

WHAT YOU CAN DO HERE

To write to the family:

- 1 Type in the box at the bottom.
- 2 Press Enter, or press the send button. Hold Shift and press Enter to start a new line instead of sending.

Good to know

- The family sees your message in their phone app the moment you send it. Read it back before you press send.
- This is for the family. Notes for your own team belong on **Special Instructions** (section 3.13).

3.12 Timeline tab

WHAT THIS SCREEN IS FOR

the full history of the case, in order, so you can see who did what and when.

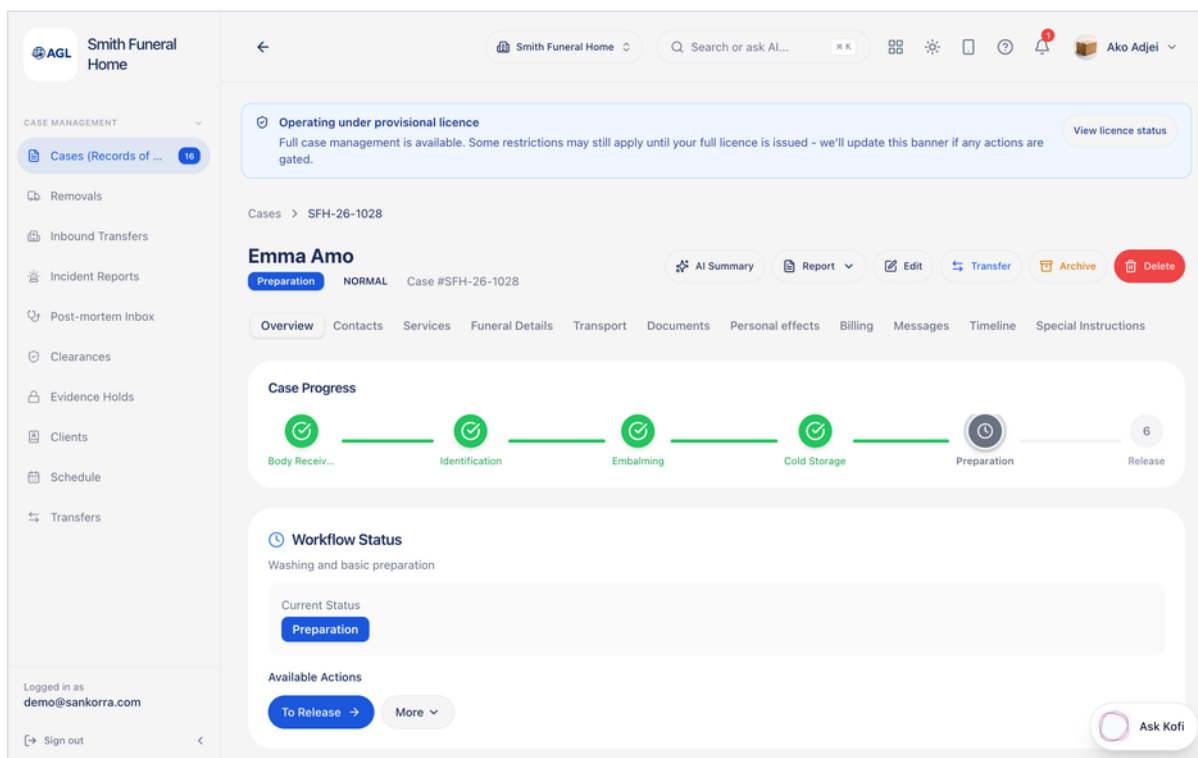
HOW TO GET HERE

Cases → the case → **Timeline**.

WHAT YOU SEE ON THE SCREEN

- **Activity Timeline** with a count of events.

- A category filter. The categories are **Status Change**, **Document**, **Contact**, **Service**, **Billing**, **Storage**, **Transport**, **Communication**, **Compliance**, **Workflow**, **Note** and **System**.
- A **Chain Verified** badge in green, or **Chain Invalid** in red.
- The events themselves, newest first, each with its category, its time, who did it, and a signature image where one was captured.



The Activity Timeline showing events by category with the Chain Verified badge

WHAT YOU CAN DO HERE

To follow one thread:

- 1 Choose a category in the filter — for example **Storage** to see every move in and out of cold storage.
- 2 Choose **All Categories** to see everything again.

To check that nothing has been tampered with:

- 1 Look at the badge beside the filter.
- 2 **Chain Verified** means the history is intact.
- 3 **Chain Invalid** means it is not. Tell your administrator at once and do not simply carry on.

Good to know

- You cannot edit or delete timeline events. That is the point of them.
- Signatures taken when a case moved stage are shown here, so you can see who signed for each step.

3.13 Special Instructions tab

WHAT THIS SCREEN IS FOR

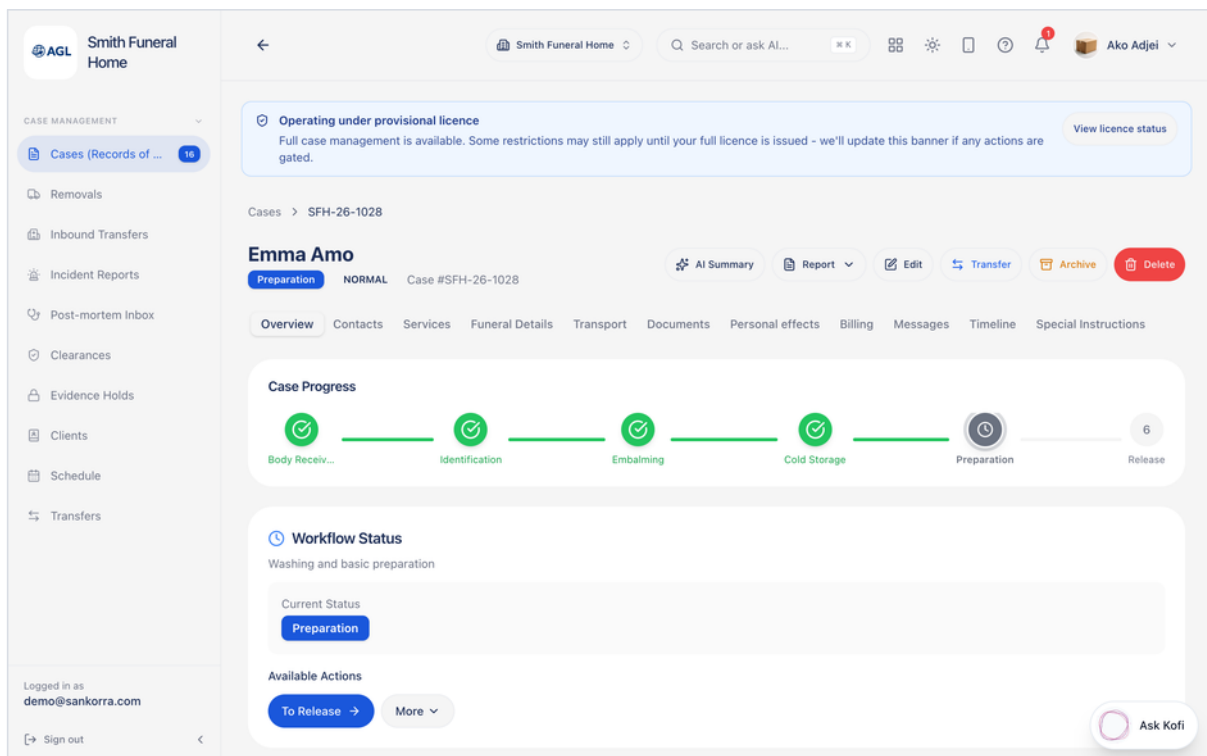
dated notes for your own team, so a shift handover does not lose anything.

HOW TO GET HERE

Cases → the case → **Special Instructions**.

WHAT YOU SEE ON THE SCREEN

- **Special Instructions / Notes** with the line "Timestamped notes for a clean handover between staff. Visible to your facility team only."
- A typing box and **Add Note**.
- The notes below, each with the name of whoever wrote it and the exact time, and a bin button where you are allowed to remove it.



The Special Instructions tab showing the note box and two timestamped notes

WHAT YOU CAN DO HERE

To leave a note for the next shift:

- 1 Type the note in the box.
- 2 Press **Add Note**. Your name and the time are attached automatically.

To remove a note:

- 1 Press the bin on it. You can remove your own notes; administrators can remove anybody's.

Good to know

- These notes are for your team only. The family never sees them. Anything the family should read belongs on **Messages**.

3.14 Editing a case

WHAT THIS SCREEN IS FOR

correcting or filling in the case's details after it has been opened.

HOW TO GET HERE

Cases → the case → **Edit**.

WHAT YOU SEE ON THE SCREEN

- **Edit Case: [name]** with the case number underneath.
- The same form your facility uses to create a case, already filled in with what is on record — including the primary contact's name, relationship, phone, email and address, and any extra boxes your facility added.
- A save button and **Cancel**.

The screenshot displays the 'Edit Case' interface for a user named Emma Amo. The interface includes a top navigation bar with the facility name 'Smith Funeral Home', a search bar, and user profile information. A prominent banner at the top states 'Operating under provisional licence'. The main content area is titled 'Edit Case: Emma Amo' and shows the case number 'Case #SFH-26-1028'. Below this, a form titled 'Deceased Information' contains several input fields: 'First Name' (filled with 'Emma'), 'Middle Name', 'Last Name' (filled with 'Amo'), 'Suffix' (filled with 'Jr., Sr., III, etc.'), 'Date of Birth' (filled with '28.09.2018'), 'Gender' (set to 'Male'), 'Residence (Hometown / Address)' (filled with '20 Nii Boi street'), and 'Religion' (set to 'Christianity'). A left sidebar provides navigation links for various case management tasks. The bottom right corner features an 'Ask Kofi' button.

The Edit Case form filled in with the existing details

WHAT YOU CAN DO HERE

To correct a case:

- 1 Press **Edit** at the top of the case.
- 2 Change what is wrong.
- 3 Save. You are taken back to the case, on the **Contacts** tab.

Good to know

- You need permission to edit cases. Without it you see **Access Denied**.
- An archived case cannot be edited. You see **Cannot Edit Archived Case**. Restore it first.
- The boxes on this form are set up by your facility, so it may not look exactly like the intake form.

3.15 Body tags: issuing and scanning

WHAT THIS SCREEN IS FOR

the tag on the body, and the record of every time somebody scanned it. This is how you prove the right person was moved, handed over and released.

HOW TO GET HERE

The **Body Tag** card on a case's **Overview** tab issues and prints tags. The scanner is the **Scan Tag** button in the top bar on a phone or tablet, or the link from the Body Tag card.

WHAT YOU SEE ON THE SCREEN

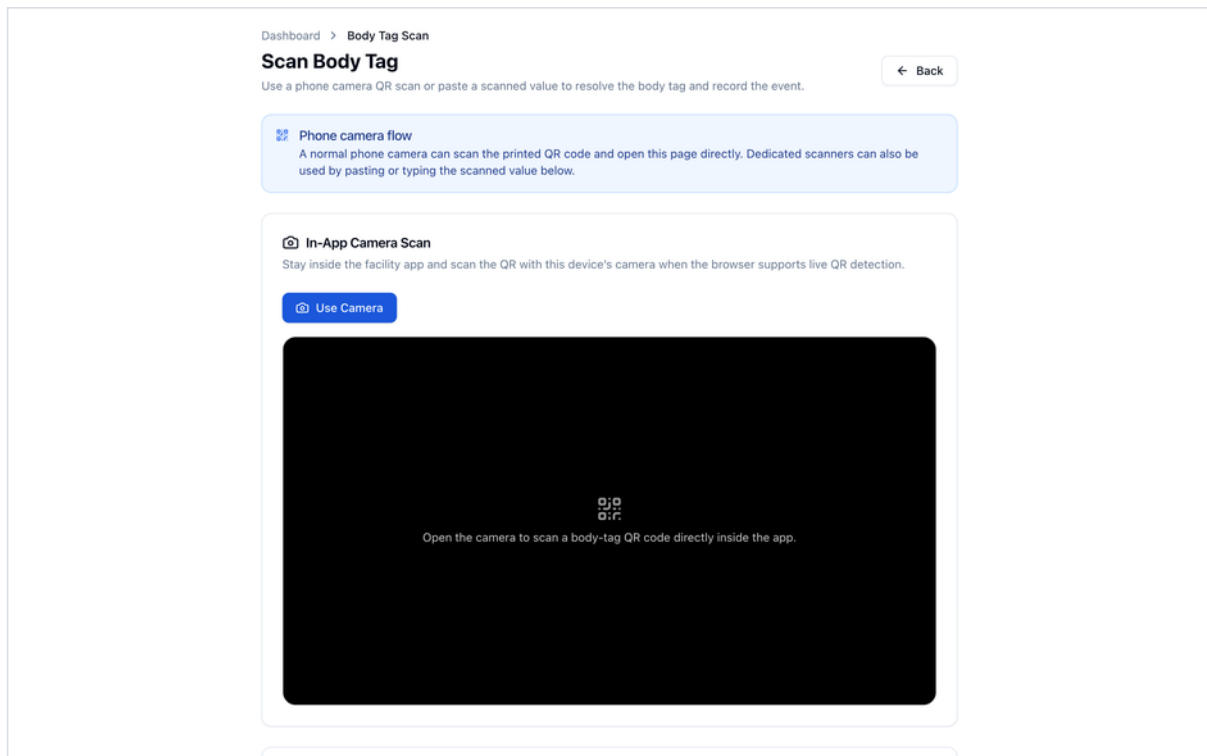
On the **Body Tag** card on a case:

- The tag code, large, with its state: **Active**, **Replaced**, **Retired** or **Voided**.
- Its kind — **Wrist**, **Ankle**, **Pouch**, **Temporary** or **Other** — and whether it is the **Primary** tag.
- How many times it has been printed.
- **Issued**, **Last Printed**, **Tag UID** and **Issued By**.
- Buttons: **Issue Tag** when there is none, or **Preview Tag**, **Replace Tag** and **Retire Tag** when there is.
- **Tag History** — every earlier tag with why it stopped being used.
- **Recent Scan Activity** — each scan with its kind, its result, the tag code, the time and who scanned.

Scan kinds are **Issue**, **Verify Identity**, **Storage In**, **Storage Out**, **Handoff Out**, **Handoff In**, **Release** and **Reprint Check**. Scan results are **Match**, **Mismatch**, **Unknown Tag**, **Inactive Tag** and **Override**.

On the **Scan Body Tag** screen:

- **Scan Body Tag** with the line about resolving the tag and recording the event.
- A note explaining that an ordinary phone camera can read the printed QR code and open this page directly.
- **In-App Camera Scan** — opens your device's camera inside the app, where the browser supports it.
- **Lookup Tag** — a box, "Paste QR URL, tag UID, or tag code", for a hand-held scanner or typing by hand.
- Once a tag is found: the deceased's name, the **Case**, the **Tag UID**, the tag's state, a **Scan type** chooser, a **Computed result** shown to you before you commit, an **Assign to compartment** chooser on a storage-in scan, and a **Notes** box.



The Scan Body Tag screen showing the camera panel and the Lookup Tag box

WHAT YOU CAN DO HERE

To issue a tag on a new case:

- 1 Open the case and find the **Body Tag** card.
- 2 Press **Issue Tag**.
- 3 Type the **Tag Code** printed on the physical tag. If your facility numbers tags automatically, the box says "Auto-generated on issue" and you leave it alone.
- 4 Choose the **Tag Type** — wrist, ankle, pouch, temporary or other.
- 5 Add a note if you need to.
- 6 Issue. A preview opens so you can print.

To print a tag:

- 1 Press **Preview Tag**.
- 2 Check the name, the tag code and the QR code.
- 3 Print. The print is counted and the date recorded, so a reprint is visible later.

To replace a damaged or wrong tag:

- 1 Press **Replace Tag**.
- 2 Type the **New Tag Code** and choose its type.
- 3 Type the **Replacement Reason**. It is required.
- 4 Save. The old tag is marked **Replaced** and stays in **Tag History**.

To retire a tag without replacing it:

- 1 Press **Retire Tag**.
- 2 Type the **Retirement Reason**. It is required.
- 3 Save.

To scan a tag in the field:

- 1 Press **Scan Tag** in the top bar on your phone or tablet.
- 2 Press to open the camera and point it at the QR code — or point your phone's ordinary camera at the code, which opens this page for you.
- 3 If your browser cannot scan, paste or type the code into **Lookup Tag** and press to look it up.
- 4 Check the deceased's name and case on screen against the body in front of you.
- 5 Choose the **Scan type: Verify Identity, Storage In, Storage Out, Handoff In, Handoff Out or Release**.
- 6 Read the **Computed result**. **Ready to record** means the tag matched.
- 7 On a **Storage In** scan, choose the compartment to put them in.
- 8 Add notes.
- 9 Record the scan. On a storage-in or storage-out scan you are asked to confirm, because the scan also moves the body in the system.

Good to know

- Whether you can issue, replace or retire tags from the case screen depends on your facility's settings and your role. The card tells you plainly if it is switched off, if it has been moved elsewhere, or which roles are allowed.
- Tag actions do not by themselves move the case's workflow stage. Only the storage-in and storage-out scans change where the body is recorded as being.
- A scan whose result is not **Match** is still recorded, marked as an exception. That is deliberate — a mismatch is exactly the thing that must never be quietly dropped.
- A tag that is not linked to a case cannot be used for a storage-in or storage-out scan. You are told so.
- Staff must be signed in to the facility app on their phone to scan.

3.16 Moving a case forward, and releasing it

WHAT THIS SCREEN IS FOR

the **Workflow Status** panel on the case **Overview** tab, which is how a case travels from intake to release.

HOW TO GET HERE

Cases → the case → **Overview** → **Workflow Status**.

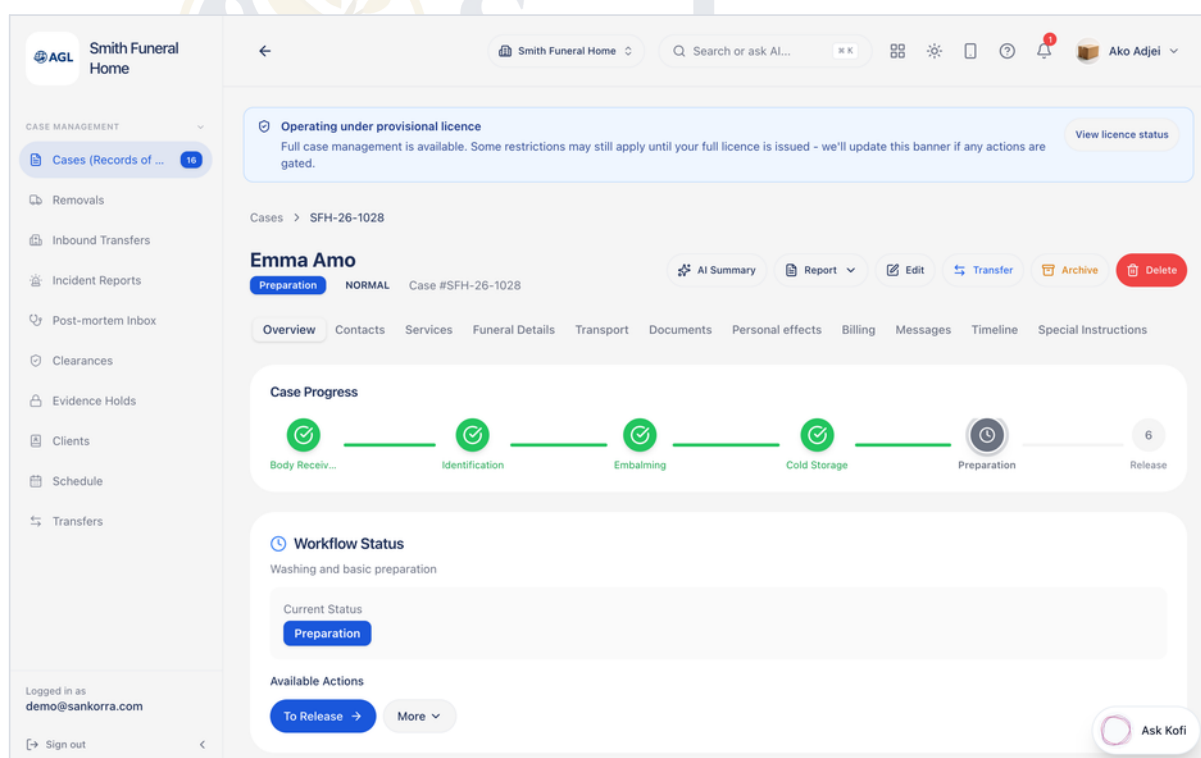
WHAT YOU SEE ON THE SCREEN

- **Current Status** — the stage, in its own colour. A finished stage says **(Completed)**; a cancelled one says **(Cancelled)**.
- **SLA Due** — a target date, in red once it has passed.

- **Available Actions** — a button for each move the case can make now, with its own wording, for example "Move to cold storage" or "Release to family". Moves that must be approved first carry a small clock.
- **Skip to [stage]** in amber, where a stage is optional.
- **More** — holds cancelling moves.
- On a finished or cancelled case: a message saying so, and **Restart workflow** if you are allowed to.

When you press a move, a confirmation panel opens showing the old stage, an arrow, and the new one, plus:

- **Your Signature** — required. Either **Use saved signature** or **Draw new signature**.
- A compartment chooser, where the move puts the case into storage and it is not in storage yet.
- An amber note when the move is a release or discharge: "After you continue, a 6-digit verification code will be sent to the primary contact through the facility's configured delivery channels. The case will only be discharged or released after that code is entered and verified."
- **Notes (optional)**.
- The action button, which reads **Confirm**, **Confirm & Assign Storage**, **Request Approval** or **Send Verification Code** depending on the move.



The Confirm Status Change panel showing the old and new stage, the signature section and the release verification note

WHAT YOU CAN DO HERE

To move a case to the next stage:

- 1 Press the button for the move you want under **Available Actions**.
- 2 Sign — either use your saved signature or draw a new one. You cannot continue without signing.
- 3 If a compartment chooser appears, pick the unit and compartment the body is going into.
- 4 Add notes if useful.
- 5 Press **Confirm**, or **Confirm & Assign Storage**.

To release the deceased to the family:

- 1 Make sure everything in the list below is done. Most release attempts fail on one of these.
- 2 Press the release or discharge button.
- 3 Sign.
- 4 Press **Send Verification Code**.
- 5 A 6-digit code goes to the case's primary contact. The panel that opens names each address or number the code went to, and when the code expires.
- 6 Ask the family contact to read you the code.
- 7 Type it in and confirm.
- 8 If nothing arrives, press to resend.

To skip an optional stage:

- 1 Press **Skip to [stage]** in amber.
- 2 Read the reason shown for why this stage may be skipped.
- 3 Type a note if asked, and confirm.

Good to know — what blocks a release

If any of these is true, the release is refused and a message lists exactly which ones, each on its own line:

What stops you	What to do
An outstanding balance	Take the payment, or void the wrong charges
Still in a storage place	Release them from storage first
No burial date and location	Set the final disposition (section 3.3)
Release checklist not complete	Tick the items, or have a supervisor override
An active police evidence hold	Wait until the police lift it (section 3.24)
Required clearances not issued	Chase the partner (section 3.23)
No primary contact on the case	Add one on the Contacts tab

What stops you	What to do
Nobody has identified the deceased	Record an identification, or have an owner approve a release without one

Good to know — the rest

- Your facility's stages, their names and their order are set up by your administrator, so what you see may not match another facility.
- Some moves need approval. The case does not move; a request goes for review and you are told so.
- Every move needs your signature. Save one on your own **Profile** page (your name in the top-right corner, then **Profile**) and you can reuse it for every move instead of drawing it each time. Without a saved one, the panel goes straight to drawing.
- If the case had no workflow at all, the panel offers **Start Workflow** instead.
- If the move needs a compartment but your facility has no storage set up, the move is allowed through and you can assign storage later from the Storage page.
- If the move succeeds but the storage assignment fails, you are told plainly — the case has moved, and you must assign storage from the Storage page.
- **Restart workflow** puts the case back at the first stage on a fresh workflow. The old history is kept. It needs its own permission.
- Nobody can be released if the verification code cannot be delivered at all. If you are told there is no delivery route, add a phone number or email address for the primary contact, or link them to the phone app.

3.17 Removals

WHAT THIS SCREEN IS FOR

the list of at-need body collections: a family has called, and you are sending a vehicle.

HOW TO GET HERE

Sidebar → Case Management → Removals.

WHAT YOU SEE ON THE SCREEN

- **Removals** with the line "At-need body removals. Log calls, dispatch drivers, and hand off to case creation once the body is back at the facility.", plus **Settings** and **New removal**.
- A search box — "Search by removal #, caller, deceased, or address" — and a status filter.
- The table: **Removal #**, **Deceased**, **Caller**, **Pickup**, **Urgency**, **Status** and **Location**.
- **Urgency** shows **immediate** in red with a warning triangle, **same day** in amber and **scheduled** in grey.
- **Location** shows **Pin captured** in green when the caller has shared a GPS pin, or a dash.

Statuses are **Requested**, **Dispatched**, **On scene**, **In transit**, **Returned**, **Converted** and **Cancelled**.

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Removals

At-need body removals. Log calls, dispatch drivers, and hand off to case creation once the body is back at the facility. [Settings](#) [+ New removal](#)

Search by removal #, caller, deceased, or address All statuses

Removal #	Deceased	Caller	Pickup	Urgency	Status	Location
RMV-20260911-0001 9/11/2026, 3:59:45 PM	Kofi Dela 78 yrs	Bernard ☎ (055) 091-6600	Palm Ave, Accra, Ghana Around the taxi rank	⚠ Immediate	Converted	📍 Pin captured
RMV-20260827-0001 8/27/2026, 12:41:12 PM	Bill Eli 24 yrs	Eli ☎ (054) 968-1355	40 amli street	⚠ Immediate	Converted	📍 Pin captured
RMV-20260730-0002 7/30/2026, 10:04:08 PM	Jon Dotey 78 yrs	John doe ☎ (024) 488-8888	HR3C+FFH, 28th February Rd, ... HE IS HEAVY!	⚠ Immediate	Dispatched	-
RMV-20260730-0001 7/30/2026, 4:27:24 PM	Cookie Jar 89 yrs	Cookie Doe ☎ (024) 400-0008	Oxford Street, HR8C+H44, Da... He is heavy!	⚠ Immediate	Dispatched	-
RMV-20260711-0001 7/11/2026, 12:09:40 PM	Gezwgwzgw Uheuiwhiw 88 yrs	Euheukue jwoiuw ☎ (051) 544-5454	Castle Dr, Accra, Ghana	⚠ Immediate	Requested	-
RMV-20260710-0001 7/10/2026, 11:14:40 PM	Fjth Fuihudh 78 yrs	Jhdhdsb ☎ (024) 454-4548	Lashibi Call 015454654646 when you get ...	⚠ Immediate	Dispatched	🗣 Ask Kofi

Logged in as demo@sankorra.com [Sign out](#)

The Removals list showing several removals with urgency and status

WHAT YOU CAN DO HERE

To log a call from a family:

- 1 Press **New removal**.
- 2 Fill in the **Caller** section: **Caller name** and **Caller phone** at least, then their email and **Relationship to deceased**.
- 3 Leave **Caller is the client** ticked if the person calling is the one you will bill. If not, untick it and fill in the **Client name**, **Client phone** and **Client relationship to deceased**.
- 4 Fill in the **Deceased** section: **First name**, **Last name**, **Estimated age** and **Gender**.
- 5 Fill in **Death information**: **Reported time of death**, **Reported cause**, and whether **A doctor attended**.
- 6 Fill in **Pickup**: the **Place of death / pickup** and any **Pickup notes** — the landmark, the gate, the floor.
- 7 Choose the **Urgency**: **Immediate**, **Same day** or **Scheduled**. For **Scheduled** you must also set the **Scheduled pickup time**.
- 8 Press **Log Removal**. The removal opens.

To find a removal:

- 1 Type the removal number, the caller, the deceased or the address in the search box.
- 2 Or choose a status in the filter.
- 3 Press the removal number to open it.

Good to know

- Fields marked with a star are required. Your facility can change this form — reorder it, relabel it, add its own boxes — so it may differ from the list above.
- **Settings** is where an administrator sets the cancellation reasons and whether a text message goes to the driver automatically. Without cancellation reasons configured, a removal cannot be cancelled.

3.18 A removal in detail

WHAT THIS SCREEN IS FOR

running one collection: sending a driver, getting a precise location out of the caller, taking the field report, and turning the finished removal into a case.

HOW TO GET HERE

Removals → press the removal number.

WHAT YOU SEE ON THE SCREEN

The removal number as the heading, with "For [deceased's name]" underneath, its status, and the buttons that apply right now: **Dispatch** or **Reassign**, **Field report**, **Send to team**, **Mark on scene** / **Mark in transit** / **Mark returned**, **Convert to case**, **Open case** and **Cancel**.

Down the left:

- **Pickup location** — the address given on the call, the access notes, and either the **GPS pin captured** with its coordinates, its accuracy in metres, when it arrived and **Open in Google Maps** — or a dashed box offering to send the caller a one-tap text message to drop a pin.
- **Third-party transport**, when you used an outside provider: the provider, the driver's phone as a link you can ring, the cost and notes.
- **Caller** — name, phone, email, relationship, whether the caller is the client, and the client's details if not.
- **Deceased** — name, age, gender, time of death, cause reported, and whether a doctor attended.
- **Cancelled** — the reason, the notes and the time, if it was cancelled.
- **Field report**, once the team has submitted one: every answer, the personal effects list with quantities and condition, and the signatures for the personal-effects declaration and the removal declaration.

Down the right: **Timeline** — every event with its time and who did it.

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

← Back to removals

New removal

Log a family's call to convey a deceased from home. Fields marked * are required.

Caller
Who is calling in the removal

Caller name *

Caller phone *

Caller email

Relationship to deceased

☒ The caller is the family/client themselves

Deceased

First name *

Last name *

Age

Gender

Ask Kofi

Logged in as demo@sankorra.com

→ Sign out

A removal showing the pickup location with a GPS pin, the caller and deceased cards, and the timeline

WHAT YOU CAN DO HERE

To get an exact location from the caller:

- 1 Press **Send GPS-pin SMS**.
- 2 A message is prepared for the caller's number. Check the wording, then send.
- 3 When the caller taps the link and shares their position, the pin appears on this page with its accuracy.
- 4 Press **Open in Google Maps** to hand the driver a route.

To send your own driver:

- 1 Press **Dispatch**.
- 2 Choose the **Vehicle** and the **Driver**.
- 3 Set the **Expected arrival** if you know it.
- 4 Dispatch. If your facility sends the driver a text automatically and you have their number, it goes; otherwise the message opens for you to check and send.

To use an outside provider:

- 1 Press **Dispatch**.
- 2 Switch to the provider side of the panel.
- 3 Choose a saved **Provider**, or type the **Provider name** — for example "Accra Hearse Services".
- 4 Add the **Driver phone**, the **Cost** and any **Notes** such as "ETA ~40 min".
- 5 Dispatch.

To send the removal team the field form:

- 1 Press **Send to team**.
- 2 A link is prepared for the team's number. Check it and send. If no team number is on file, the link is copied for you to share yourself.
- 3 The team fills it in on their phone and signs.

To fill in the field report yourself:

- 1 Press **Field report** and complete it on this screen.

To walk the removal forward:

- 1 Press **Mark on scene** when the vehicle arrives.
- 2 Press **Mark in transit** when they leave with the deceased.
- 3 Press **Mark returned** when the deceased is back at the facility.
- 4 If a removal was reported to you late, press **Mark returned** straight away — you do not have to click through stages that never happened.

To turn a finished removal into a case:

- 1 Press **Convert to case**. This only appears once the removal is **Returned**.
- 2 Check the deceased's **First name**, **Last name**, **Other names**, **Date of birth**, **Date of death**, **Gender** and **Cause of death** — filled in from the call.
- 3 Check the primary contact shown underneath.
- 4 Confirm. The case is created, and **Open case** appears on this page.

To cancel a removal:

- 1 Press **Cancel**.
- 2 Choose one of your facility's configured **Reasons**.
- 3 Add notes.
- 4 Press **Confirm cancel**.

Good to know

- A pin from the caller is worth far more than an address. Send the link before the driver leaves.
- **Convert to case** deliberately waits until the deceased is back. A vehicle still on the road may be re-routed, cancelled or handed over.
- Cancelling is a legal event. It is logged with your name and the time on the timeline, and it cannot be undone.
- **Cancel** does not appear at all if your facility has not turned cancellation on.
- If the regulator has restricted intake, **Mark returned** is refused and the emergency override panel opens. You must explain, in at least 15 characters, why refusing or diverting this deceased is not possible.

3.19 Inbound Transfers

WHAT THIS SCREEN IS FOR

deceased coming to you from a hospital or another institution, rather than from a home.

HOW TO GET HERE

Sidebar → Case Management → Inbound Transfers.

WHAT YOU SEE ON THE SCREEN

- **Inbound Transfers** with the line "Deceased transferred in from hospitals and other institutions. Accept, arrange transport, and confirm receipt with a signed chain of custody.", and **New transfer**.
- A search box — "Search by transfer #, deceased, hospital, or tag" — and a status filter.
- The table: **Transfer #**, **Deceased** with the hospital's body tag, **Source hospital** with its town, **Transport (We collect or Hospital delivers)** and **Status**.

Statuses are **Requested**, **Accepted**, **Rejected**, **In transit**, **Received**, **Converted** and **Cancelled**.

The screenshot shows the 'Inbound Transfers' section of the Smith Funeral Home dashboard. The sidebar on the left lists various case management options, with 'Inbound Transfers' selected. The main area features a search bar, a status filter, and a table of transfers. A banner at the top indicates the user is operating under a provisional licence.

Transfer #	Deceased	Source hospital	Transport	Status
ITR-20260911-0001 9/11/2026, 4:17:04 PM	Kofi Osei Tag: Ref	Smith Police Hospital Accra	Hospital delivers	Accepted

The Inbound Transfers list showing transfers with their source hospital and transport mode

WHAT YOU CAN DO HERE

To log a transfer yourself:

- 1 Press **New transfer**.
- 2 Choose the **Source institution** from your connected partners, or type the institution's name, town and phone.
- 3 Choose the **Transport: We collect (send our hearse / transport)** or **They deliver**.
- 4 Fill in the deceased's **First name**, **Last name**, **Gender**, **Age** and **Date of death**.

- 5** Add the **Body tag / mortuary ref** and the **Ward / location** — these are how the hospital will find the body when your driver arrives.
- 6** Add the **Cause reported**, the **Institution contact** (the attendant or mortician), their **Contact phone** and **Notes**.
- 7** Press **Log transfer**.

To find a transfer:

- 1** Search by transfer number, deceased, hospital or body tag, or filter by status.
- 2** Press the row to open it.

Good to know

- When a partner hospital sends you a transfer, a message appears on your screen the moment it arrives, with an **Open** button. You do not have to keep refreshing.
- This page only appears if inbound transfers are switched on for your facility.

3.20 An inbound transfer in detail

WHAT THIS SCREEN IS FOR

accepting or refusing a transfer, getting the deceased to you, and signing the chain of custody at both ends.

HOW TO GET HERE

Inbound Transfers → press the row.

WHAT YOU SEE ON THE SCREEN

The deceased's name as the heading, with the transfer number and its status. The buttons change with the status:

- **Requested** — **Accept** and **Reject**.
- **Accepted** — **Record release & in transit**, **Confirm received** and **Cancel**.
- **In transit** — **Confirm received** and **Cancel**.
- **Received** — **Convert to case**.
- **Converted** — **Open case**.

Then:

- **Source & deceased** — the hospital, its town, the **Ward / location**, the **Body tag / ref**, then the deceased's name, gender, age, date of death and cause reported, then the **Transport** mode, the **Institution contact**, their phone and the notes.
- **Pickup (removal)** — when you are collecting: the removal number, its status and **Open removal**.
- **Chain of custody** — two signature blocks side by side, **Released by (hospital)** and **Received by (mortuary)**, each showing the signature, the signer's name and the time, or "Not signed yet".

- **Timeline** — Transfer requested, Accepted by mortuary, Rejected, In transit / released, Received at mortuary, Cancelled, Converted to case.

The screenshot displays the Sankorra Facility Dashboard for 'Smith Funeral Home'. The left sidebar lists various case management options: Cases (Records of ...), Removals, Inbound Transfers (selected), Incident Reports, Post-mortem Inbox, Clearances, Evidence Holds, Clients, Schedule, and Transfers. The main content area shows a case for 'Kofi Osei' with ID 'ITR-20260911-0001' and status 'Accepted'. A banner at the top indicates 'Operating under provisional licence'. Below the case name, there are buttons for 'Record release & in transit', 'Confirm received', and 'Cancel'. The 'Source & deceased' section provides details about the patient's location (Smith Police Hospital, Accra, 1st floor) and personal information (Kofi Osei, Male, 82, Date of death 9/2/2026, Cause reported fell). The 'Timeline' section shows two events: 'Transfer requested' on 9/11/2026 at 4:17:04 PM and 'Accepted by mortuary' on 9/11/2026 at 4:18:38 PM. A 'Chain of custody' section is partially visible at the bottom. The user is logged in as 'demo@sankorra.com'.

A transfer showing the source and deceased card, the chain of custody signatures and the timeline

WHAT YOU CAN DO HERE

To accept a transfer:

- 1 Press **Accept**.
- 2 If the transport mode is **We collect**, a removal is created for the pickup at the same time and you are told so. Open it from the **Pickup (removal)** card and dispatch a driver as in section 3.18.

To refuse a transfer:

- 1 Press **Reject**.
- 2 Type a reason. It is required and it stays on the record.

To record the hospital's release:

- 1 At the hospital, press **Record release & in transit**.
- 2 Hand the device to the hospital attendant releasing the body.
- 3 They type their name and sign on the screen.
- 4 Save. The status becomes **In transit**.

To confirm the deceased has arrived:

- 1 Press **Confirm received**.
- 2 The member of staff receiving the body types their name and signs.
- 3 Save.

To open a case from the transfer:

- 1 Press **Convert to case**.
- 2 A case is created with the deceased's name, gender, date of death, cause and the hospital as the place of death, and a note saying which transfer it came from.
- 3 The case opens.

To cancel a transfer in progress:

- 1 Press **Cancel** and type a reason.

Good to know

- Both signatures matter. They are the chain of custody: they prove who handed the deceased over and who took them. Take them at the moment of the handover, not afterwards.
- If the regulator has restricted intake, **Confirm received** is refused and the emergency override panel opens. Your signature is kept, and once you have written your justification the receipt is recorded through the override path with a trail for the regulator.

3.21 Incident Reports

WHAT THIS SCREEN IS FOR

early death notices filed by the police and other partners, before any transfer exists.

HOW TO GET HERE

Sidebar → Case Management → Incident Reports.

WHAT YOU SEE ON THE SCREEN

- **Incident Reports** with the line "Death / incident notifications filed by police and other partners. Acknowledge and convert to a transfer."
- A search box — "Search by report #, deceased, partner, or OB #" — and a status filter.
- The table: **Report #**, **Incident** with the police OB number, **Deceased**, **Partner** and **Status**.

Incident types are **Road accident**, **Homicide**, **Suspicious death**, **Unattended death**, **Unclaimed body**, **Drowning**, **Fire** and **Other**. Statuses are **Reported**, **Acknowledged**, **Transfer started**, **Closed** and **Withdrawn**.

On one report you see two cards:

- **Incident** — who reported it, the type, the police or OB reference, when it happened, the scene location, the circumstances, and where the body is being held.
- **Deceased** — whether they are identified, the name if so, the gender, the estimated age, the body condition, and the next of kin's name and phone.

The screenshot displays the Sankorra Facility Dashboard. On the left is a sidebar with a 'CASE MANAGEMENT' section containing links to 'Cases (Records of ...)', 'Removals', 'Inbound Transfers', 'Incident Reports' (highlighted), 'Post-mortem Inbox', 'Clearances', 'Evidence Holds', 'Clients', 'Schedule', and 'Transfers'. At the bottom of the sidebar, it shows 'Logged in as demo@sankorra.com' and a 'Sign out' link. The main dashboard area features a top navigation bar with 'Smith Funeral Home', a search bar, and user profile 'Ako Adjei'. A blue banner at the top states 'Operating under provisional licence' with a 'View licence status' button. Below this is the 'Incident Reports' section, which includes a search bar and a table. The table has columns: 'Report #', 'Incident', 'Deceased', 'Partner', and 'Status'. A single report is shown: 'INC-20260911-0001' (dated 9/11/2026, 4:21:53 PM), 'Road accident', 'Unidentified', 'Smith Police Hospital', and 'Reported'. An 'Ask Kofi' button is in the bottom right corner.

The Incident Reports list showing reports with incident type, OB number and partner

WHAT YOU CAN DO HERE

To handle a new report:

- 1 Press the row to open it.
- 2 Read the **Incident** and **Deceased** cards.
- 3 Press **Acknowledge** so the partner knows you have seen it.

To turn a report into a transfer:

- 1 Press **Convert to transfer**.
- 2 Choose the **Transport: We collect (send our hearse / transport)** or **They deliver**.
- 3 Press **Create transfer**. An inbound transfer is created, filled in from the report, and it opens. Carry on as in section 3.20.

To dismiss a report that is not for you:

- 1 Press **Dismiss**.
- 2 Type a reason. It is required and stays on the record.

Good to know

- A new report raises a message on your screen with an **Open** button the moment it is filed.
- These reports are written by the partner in their own portal. You cannot edit the details, only acknowledge, convert or dismiss.
- This page only appears if incident reports are switched on for your facility.

3.22 Post-mortem Inbox

WHAT THIS SCREEN IS FOR

bodies that a pathologist at a partner hospital has finished with and released to you.

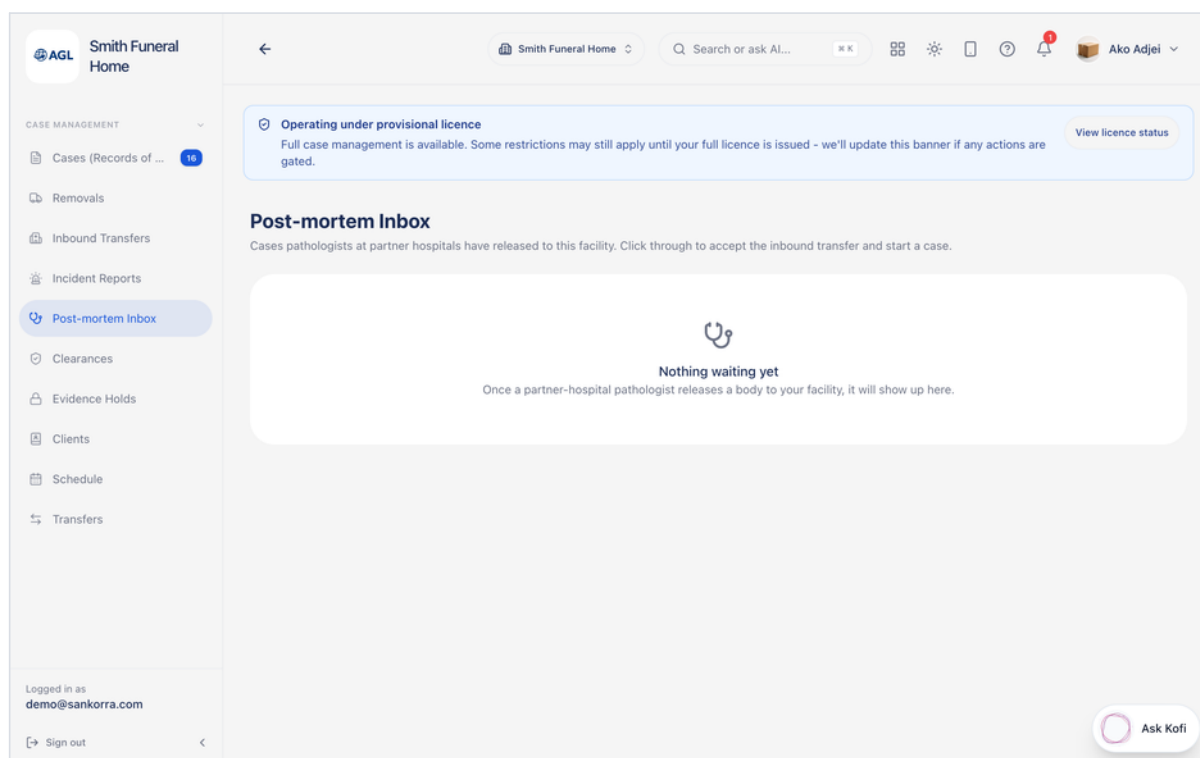
HOW TO GET HERE

Sidebar → Case Management → Post-mortem Inbox.

WHAT YOU SEE ON THE SCREEN

- **Post-mortem Inbox** with the line "Cases pathologists at partner hospitals have released to this facility. Click through to accept the inbound transfer and start a case."
- One card per release, showing the post-mortem case number, its state, the transfer number, the deceased's name (or **Unidentified**), the hospital it came from, the examiner's name, and when the cause of death was signed.
- **Open transfer** on each card.
- When empty: "Nothing waiting yet".

States are **Referred**, **In examination**, **Findings recorded**, **Cause of death signed**, **Released** and **Cancelled**.



The Post-mortem Inbox showing released cases with their examiner and transfer number

WHAT YOU CAN DO HERE

To take in a released body:

- 1 Press the card, or press **Open transfer**.
- 2 The inbound transfer opens. Accept it, arrange transport, take both signatures, and convert it to a case as in section 3.20.

Good to know

- This screen is read-only. The pathologist does the writing in their own portal; you take delivery here.
- Once the case exists, the pathologist's findings appear as a **Post-mortem** card on the case's **Overview** tab, with the cause of death and the signed certificate, and a button to print the pathology report.
- This page only appears if post-mortem work is switched on for your facility.

3.23 Clearances

WHAT THIS SCREEN IS FOR

the sign-offs you need from the police or the coroner before you may release, bury or cremate.

HOW TO GET HERE

Sidebar → Case Management → Clearances.

WHAT YOU SEE ON THE SCREEN

- **Clearances** with the line "Release, burial and cremation sign-offs requested from police and coroner partners.", and **Request clearance**.
- A search box — "Search by clearance #, deceased, partner, or case ref" — and a status filter.
- The table: **Clearance #**, **Type**, **Deceased** with the case reference, **Partner** and **Status**.

Types are **Release**, **Burial**, **Cremation**, **Exhumation** and **General**. Statuses are **Pending**, **Issued**, **Denied** and **Withdrawn**.

On one clearance you see two cards: **Request** (the partner, the type, the deceased, the case reference, the reason and when you asked) and **Outcome**. **Outcome** shows either the **Reference number**, any **Conditions**, who signed, when it was issued and their signature; or "Denied: [reason]"; or "Request withdrawn."; or "Awaiting the partner's decision."

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Clearances

Release, burial and cremation sign-offs requested from police and coroner partners. [+ Request clearance](#)

Search by clearance #, deceased, partner, or case ref All statuses

Clearance #	Type	Deceased	Partner	Status
CLR-20260908-0001 9/8/2026, 2:16:53 AM	Cremation	Ato	Smith Police Hospital	Pending

Logged in as **demo@sankorra.com**
[Sign out](#)

[Ask Kofi](#)

The Clearances list showing requests with their type, partner and status

WHAT YOU CAN DO HERE

To ask a partner for a clearance:

- 1 Press **Request clearance**.
- 2 Choose the **Partner** from your connected police or coroner partners.
- 3 Under **Link to case**, search for the case by number or by the deceased's name and press the match. The deceased's name fills in for you.
- 4 Choose the **Clearance type**.
- 5 Check the **Case reference**, and the **Deceased name**.
- 6 Add a **Reason / context**.
- 7 Press **Send request**.

To check where a request has got to:

- 1 Press the row.
- 2 Read the **Outcome** card.

To withdraw a request:

- 1 Open the clearance and press the withdraw button.
- 2 Type a reason. It stays on the record.

Good to know

- **Link the clearance to a case.** A clearance that is not linked to a case cannot stop that case being released, which rather defeats the point. The form says so: "Linking a case lets this clearance gate that case's release."
- If no partners are listed, none are connected yet. An administrator connects them in Settings → Partners.
- A required clearance that has not been issued blocks the release of its case. The release message names which clearances are missing.

3.24 Evidence Holds

WHAT THIS SCREEN IS FOR

bodies the police are holding as evidence. A body under an active hold cannot be released, full stop.

HOW TO GET HERE

Sidebar → Case Management → Evidence Holds.

WHAT YOU SEE ON THE SCREEN

- **Evidence Holds** with the line "Bodies held as evidence by police. A body under an active hold cannot be released until police lift it."
- A red strip when there are active holds: "2 bodies are under an active evidence hold and not releasable."
- A search box — "Search by hold #, deceased, partner, or exhibit" — and a status filter.
- The table: **Hold #**, **Deceased**, **Exhibit**, **Partner** and **Status**. Statuses are **Held**, **Released** and **Cancelled**.

On one hold:

- A red strip while the hold is active, naming the force holding the body.
- **Details** — who is holding it, the exhibit or reference, where it is held, and the reason. Once lifted, also the release reference, who authorised it, when, and the release notes.
- **Chain of custody** — each event with who it passed from and to, notes, and the time.

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Evidence Holds

Bodies held as evidence by police. A body under an active hold cannot be released until police lift it.

🔒 1 body is under an active evidence hold and not releasable.

🔍 Search by hold #, deceased, partner, or exhibit All statuses

Hold #	Deceased	Exhibit	Partner	Status
EVD-20260911-0001 9/11/2026, 4:35:33 PM	kofi Dela	#1234	Smith Police Hospital	Hold

Logged in as **demo@sankorra.com**
[Sign out](#)

[Ask Kofi](#)

The Evidence Holds list with the red active-hold warning strip

WHAT YOU CAN DO HERE

To check whether a body may be released:

- 1 Open **Evidence Holds**.
- 2 Read the red strip at the top. It counts the bodies that are not releasable.
- 3 Press a row to see who is holding them and why.
- 4 Tell the family plainly. Do not promise a release date.

Good to know

- You cannot place or lift a hold from here. The police do that in their own portal. This screen shows you what they have done.
- When the police place a new hold, an amber warning appears on your screen at once: "Evidence hold placed on [name] - not releasable", with an **Open** button.
- An active hold blocks that case's release, and the release message says so: "body is under an active police evidence hold and cannot be released".
- This page only appears if evidence holds are switched on for your facility.

3.25 Clients

WHAT THIS SCREEN IS FOR

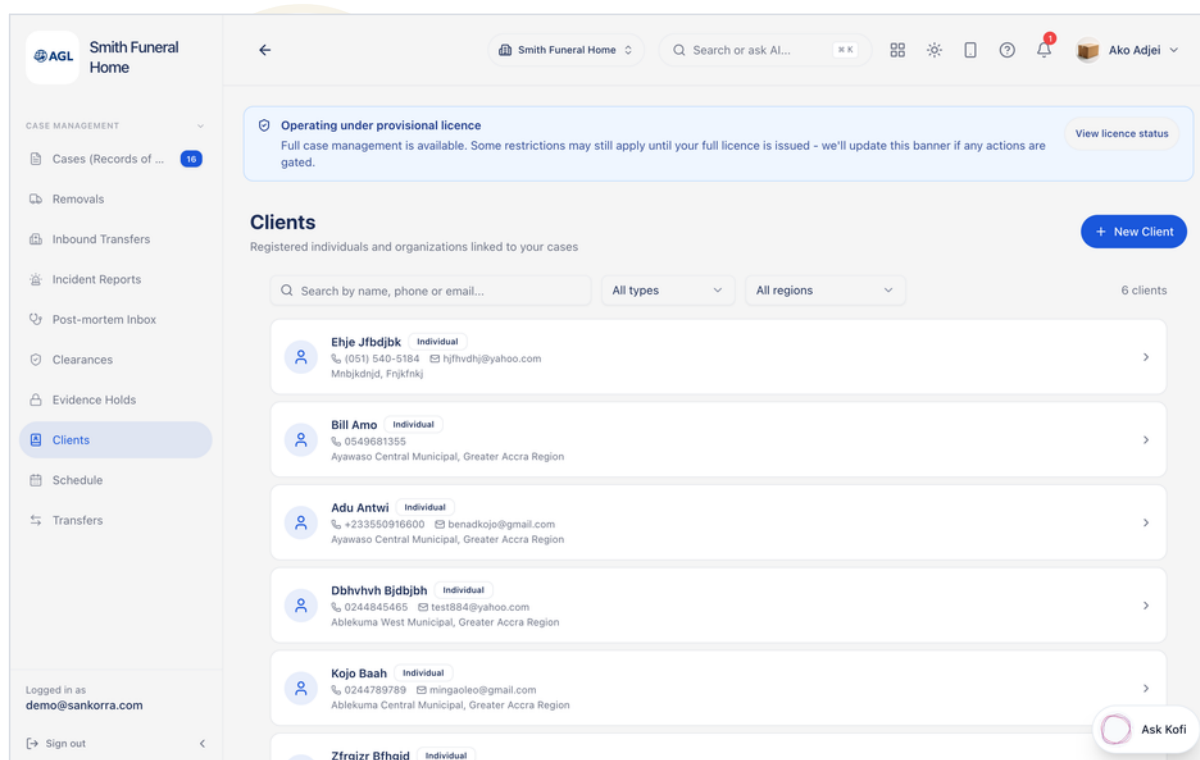
the people and organisations who bring you work and who you bill. Every case must be linked to one.

HOW TO GET HERE

Sidebar → Case Management → Clients.

WHAT YOU SEE ON THE SCREEN

- **Clients** with the line "Registered individuals and organizations linked to your cases", and **New Client**.
- A search box — "Search by name, phone or email..." — and three filters: **All types** (Individual or Organization), **All regions** (the Ghanaian regions) and, once you choose a region, **All districts**.
- A count on the right: "48 clients".
- One row per client, with a person or building icon, their name, a type label, their phone and email, and their district and region.
- Page arrows at the bottom. Twenty clients show at a time.



The Clients list with the type, region and district filters and several client rows

WHAT YOU CAN DO HERE

To register a new client:

- 1 Press **New Client**.
- 2 Complete **Register New Client** and save. The client's own screen opens.

To find a client:

- 1 Type their name, phone or email in the search box.
- 2 Or narrow by type, region and district.
- 3 Press the row to open them.

Good to know

- A client can be a person or an organisation — a church, a company, a welfare scheme. Choose the right type; it changes which name boxes you fill in.
- You can also register a client without leaving the New Case form, from the bottom of the client search results on step 1.

3.26 A client's own screen

WHAT THIS SCREEN IS FOR

one client's details and every case you have done for them.

HOW TO GET HERE

Clients → press the row.

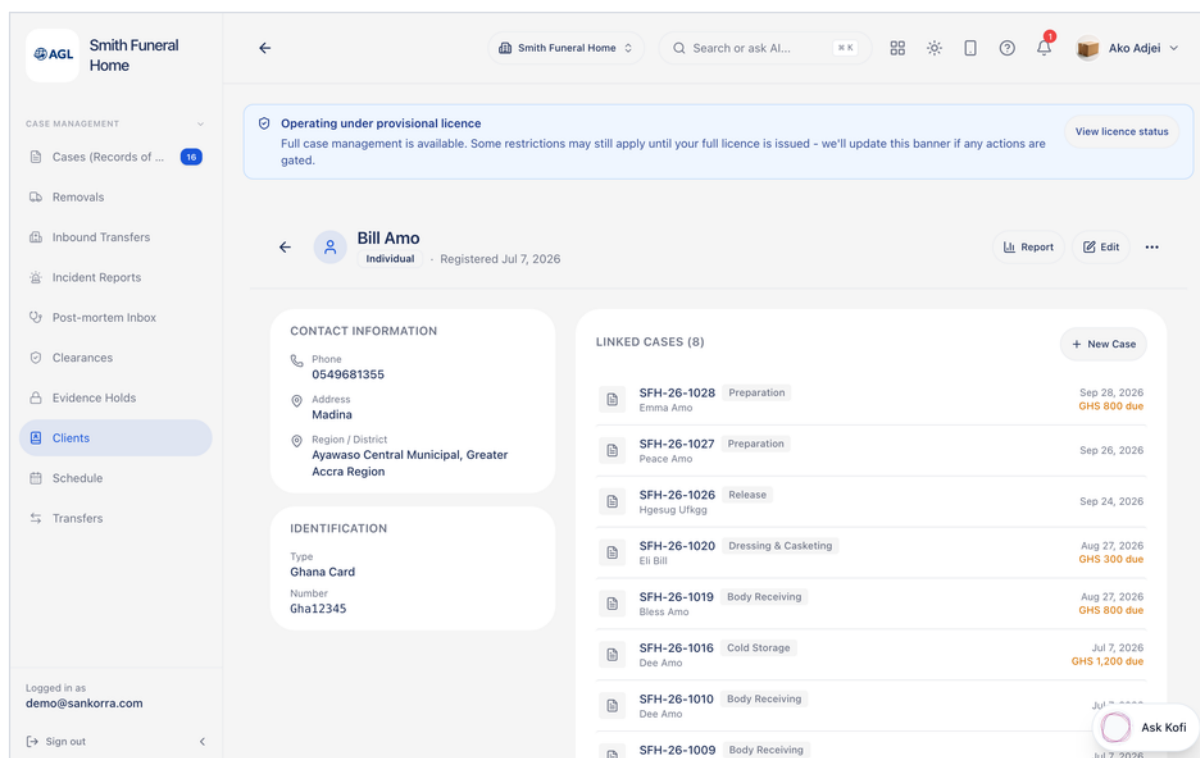
WHAT YOU SEE ON THE SCREEN

The client's name as the heading, with a type label and "Registered [date]". Three buttons: **Report**, **Edit**, and a three-dots button holding **New Case for Client** and **Delete Client**.

Down the left:

- **Contact Information** — phone, email, address, and region and district.
- The client's identification — the type of ID and its number.
- Their relationship to the deceased, the name of the deceased, and any special information, where recorded.
- Notes.

Down the right: **Linked Cases**, with a count and a **New Case** button. Each case shows its number, its status, the deceased's name, when it was created, and any balance still owed in amber.



A client's screen showing their contact information and the list of linked cases

WHAT YOU CAN DO HERE

To start a case for this client:

- 1 Press **New Case** on the **Linked Cases** card, or **New Case for Client** in the three-dots menu.
- 2 The New Case form opens with this client already chosen.

To correct a client's details:

- 1 Press **Edit**.
- 2 Change what is wrong. You can switch between an individual and an organisation, and set the region, district, ID type and number, their relationship to the deceased, and any special information.
- 3 Save.

To read a client's report:

- 1 Press **Report**. Their report opens with everything you have done for them.

To open one of their cases:

- 1 Press it in **Linked Cases**.

To delete a client:

- 1 Press the three dots, then **Delete Client**, and confirm.

Good to know

- The balance shown in amber beside a case is the money still owed on that case. It is the quickest way to see whether a returning family owes you anything.
- Deleting a client does not delete their cases. Do not delete a client to tidy up — correct them instead.

3.27 Schedule

WHAT THIS SCREEN IS FOR

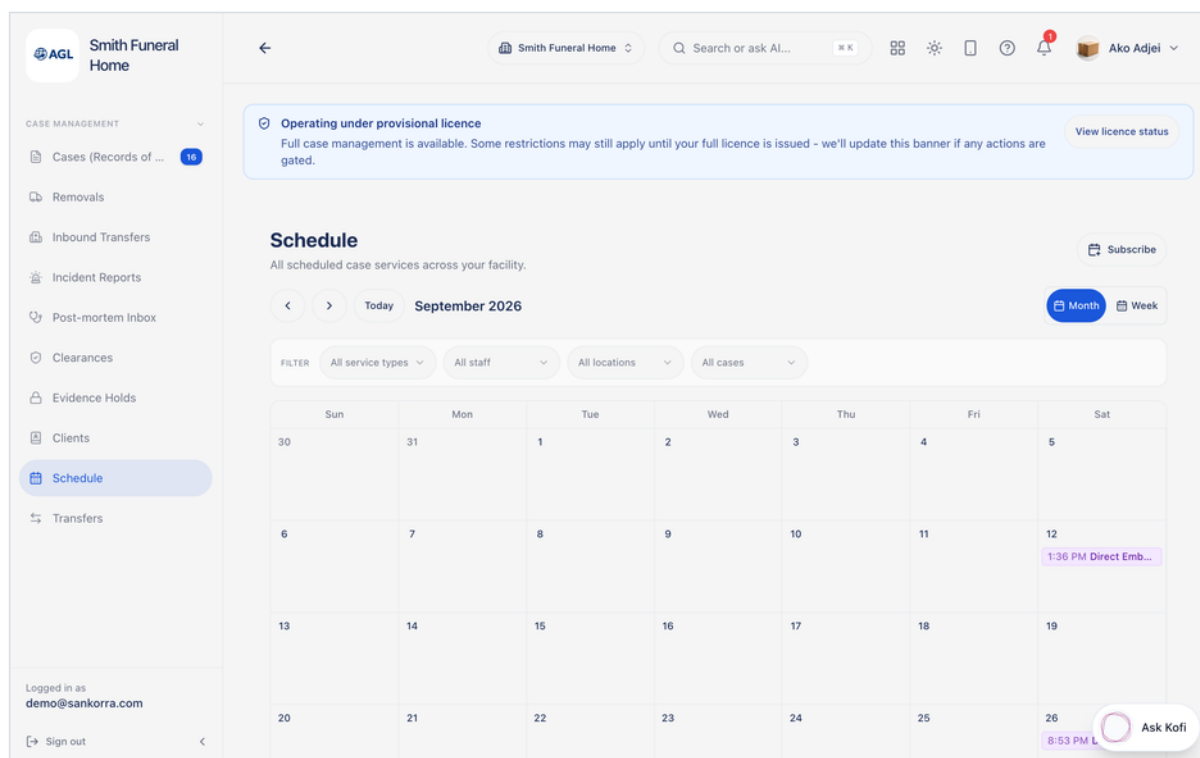
every scheduled service across the whole facility, on one calendar.

HOW TO GET HERE

Sidebar → Case Management → Schedule.

WHAT YOU SEE ON THE SCREEN

- **Schedule** with the line "All scheduled case services across your facility.", and **Subscribe**.
- Back and forward arrows, **Today**, and the month or week you are looking at.
- **Month** and **Week** buttons.
- A filter row: service type, staff, location and case. Each lets you pick several at once. Only values that actually appear in the range you are looking at are offered, so you cannot filter everything away by accident. A **Clear** button shows how many filters are on.
- The calendar itself, Sunday to Saturday, with today's date circled. Each day shows small coloured labels for its events, and "+2 more" when a day is full. Each service keeps the same colour wherever it appears.
- A detail card above the calendar when you press an event: the service, the case number, the deceased's name, the time, the location, the member of staff and **View Case**.



The month calendar with coloured service labels and the filter row above it

WHAT YOU CAN DO HERE

To move around the calendar:

- 1 Press the back and forward arrows to change month or week.
- 2 Press **Today** to come back to now.
- 3 Press **Week** for a closer look at seven days, or **Month** for the whole month.

To see one person's or one room's day:

- 1 Press the staff filter and choose the person, or the location filter and choose the room.
- 2 Press **Clear** to see everything again.

To open the case behind an event:

- 1 Press the event label in the calendar.
- 2 Read the detail card that appears above.
- 3 Press **View Case**.

To see the schedule in your own calendar app:

- 1 Press **Subscribe**.
- 2 Press the copy button beside the address shown.
- 3 In Google, Apple or Outlook Calendar, add a calendar by address and paste it in.
- 4 Venue bookings and vehicle assignments then appear there and refresh themselves.

Good to know

- Keep the subscription address private. Anyone who has it can see your facility's schedule without signing in.
- Events are scheduled on the **Services** tab of a case, not here. This calendar shows them; it does not create them.

3.28 Transfers

WHAT THIS SCREEN IS FOR

handing a whole case to another facility, and taking one in.

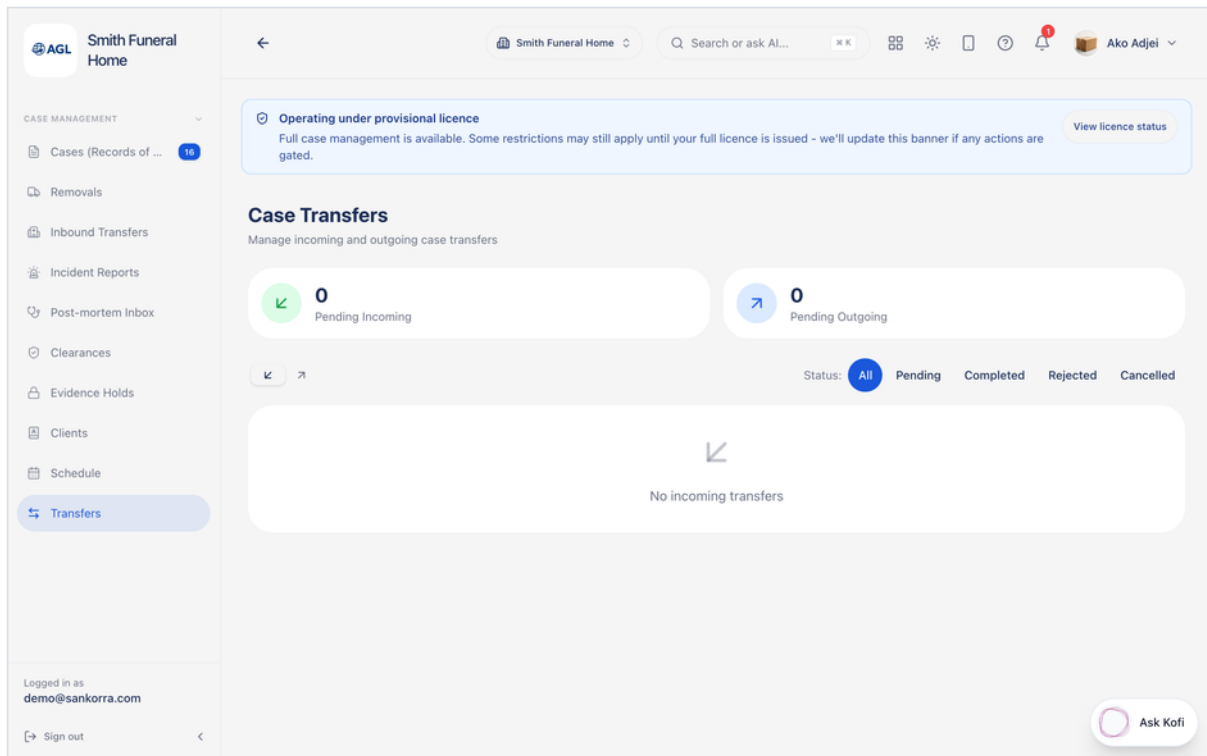
HOW TO GET HERE

Sidebar → Case Management → Transfers.

WHAT YOU SEE ON THE SCREEN

- **Case Transfers** with the line "Manage incoming and outgoing case transfers".
- Two counts: **Pending Incoming** and **Pending Outgoing**.
- Two tabs, **Incoming** and **Outgoing**, each with the number waiting.
- A status filter: **all, pending, completed, rejected, cancelled**.
- One card per transfer, showing the case number as a link, its status, an **External** label where the other end is not on Sankorra, the deceased's name, the other facility with "From:" or "To:", when it started, and small labels for what travels with it — **Docs, History, Financial**. The reason is shown underneath, and a rejection reason in red where there is one.
- Buttons on each card: **Accept** and **Reject** on a waiting incoming transfer, **Cancel** on a waiting outgoing one, and an eye button that opens the case.

Statuses are **Pending, Accepted, Rejected, Completed** and **Cancelled**.



The Transfers screen showing the pending counts, the Incoming tab and a transfer card with Accept and Reject

WHAT YOU CAN DO HERE

To send a case to another facility:

- 1 Open the case and press **Transfer** at the top.
- 2 Choose **In-Platform** and search for the receiving facility, or choose **External** and type the **Facility Name** and **Contact Email**.
- 3 Type the **Reason for Transfer** — for example "Family relocated to another city".
- 4 Under **Include with Transfer**, tick what should travel: the documents, the history and the financial information.
- 5 Add **Additional Notes** for the receiving facility.
- 6 Send. The transfer appears on your **Outgoing** tab as **Pending**.

To accept a case coming to you:

- 1 Press **Transfers** and stay on **Incoming**.
- 2 Read the card: who it is from, the deceased's name, the reason, and what comes with it.
- 3 Press **Accept**.

To refuse a case coming to you:

- 1 Press **Reject**.
- 2 Type a reason. The other facility sees it on their card.

To call back a transfer you sent:

- 1 Press **Outgoing**.
- 2 Press **Cancel** on the waiting transfer, and confirm.

Good to know

- Only a **Pending** transfer can be accepted, rejected or cancelled. Once it is **Completed** the case belongs to the other facility.
- After a case has transferred out, opening it here shows **Case Not Available** — "This case doesn't exist, has been deleted, or may have been transferred to another facility." That is expected.
- If the regulator has restricted intake at your facility, **Accept** is refused and the emergency override panel opens. Write at least 15 characters explaining why, and the acceptance is recorded with a trail for the regulator.
- The number badge beside **Transfers** in the left menu counts the transfers waiting for your answer. Clear it every day.



CHAPTER 4

The places you operate

Every screen in this chapter belongs to one kind of place: a funeral home, a chapel, a cemetery, a columbarium, a mausoleum, a crematorium or a cold-storage room. Each one appears in your sidebar **only if your facility has that facility type switched on**. If a screen described here is missing from your sidebar, your facility does not have that type yet — ask your administrator, who can request a change under Settings → Facility Types.

If you open the address of a screen your facility type does not cover, you will see a panel headed "... Not Enabled" that names the facility types the screen belongs to, with a link to request a change. A different panel, headed "... Not Available", means your subscription plan does not include the screen; that one links to the plan page instead.

4.1 Funeral Home

WHAT THIS SCREEN IS FOR

a short daily summary of the funeral work you have in hand, with quick buttons to the jobs you do most often.

HOW TO GET HERE

Sidebar → Funeral Home.

WHAT YOU SEE ON THE SCREEN

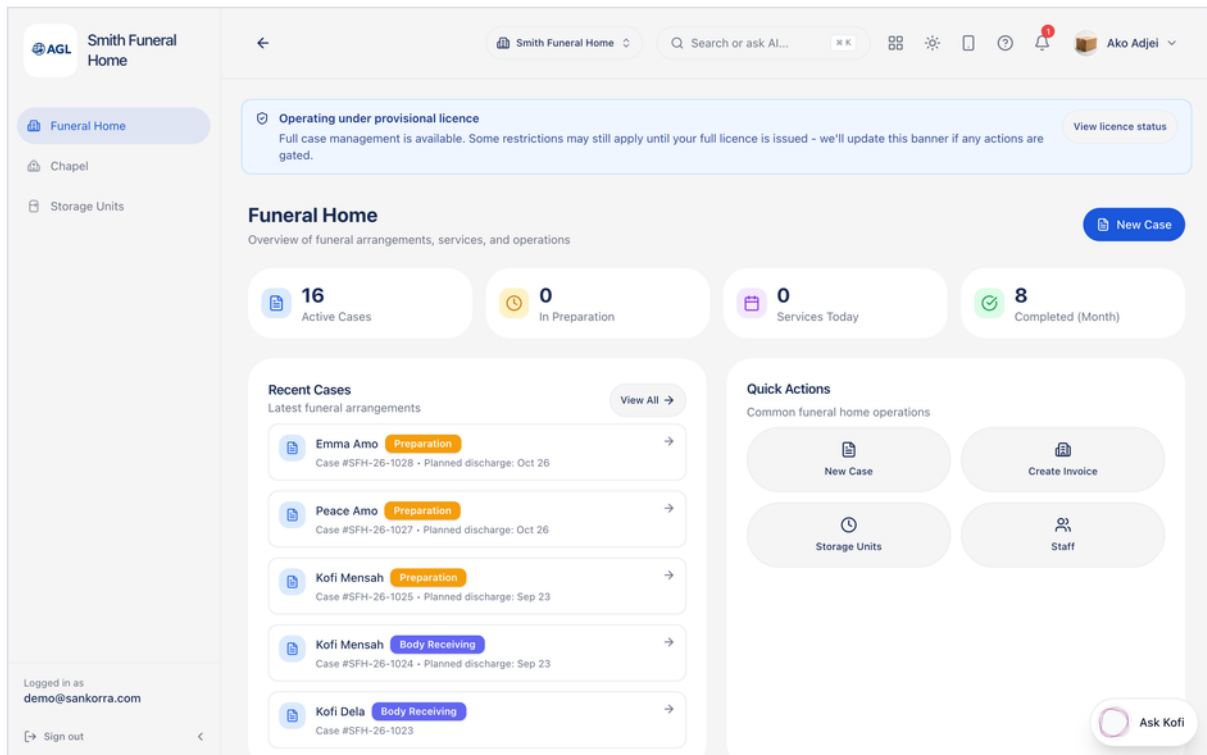
At the top, the heading **Funeral Home** with the words "Overview of funeral arrangements, services, and operations", and a **New Case** button on the right.

Below that, four counters:

Counter	What it counts
Active Cases	Cases that are still open
In Preparation	Always shows 0 — see "Good to know"
Services Today	Always shows 0 — see "Good to know"
Completed (Month)	Cases completed since the start of this month

Under the counters, two panels side by side. On the left, **Recent Cases** — "Latest funeral arrangements" — listing the five most recent cases, each with the name of the deceased, a coloured status label, the case number and, where one is set, the planned discharge date shown as "Today", "Tomorrow" or a short date. A **View All** button takes you to the full list of cases. On the right, **Quick Actions** with four buttons: **New Case**, **Create Invoice**, **Storage Units** and **Staff**.

At the bottom, a panel called **Funeral Home Services** listing the kinds of work a funeral home does, in three columns: Arrangement Services, Viewing & Visitation, and Support Services. This panel is a printed reminder only; there is nothing to press in it.



Funeral Home screen with the four counters, Recent Cases and Quick Actions

WHAT YOU CAN DO HERE

To open a case from this screen:

- 1 Find the person's name in the **Recent Cases** panel.
- 2 Press anywhere on that line.
- 3 The full case opens.

To start a new case:

- 1 Press **New Case**, at the top right or in **Quick Actions**.
- 2 Fill in the new-case form (see the chapter on cases).

Good to know

- **In Preparation** and **Services Today** always show 0. They are not yet connected to your service schedule, so do not read anything into them. For today's services, use Sidebar → Schedule.
- Only the five most recent cases show here. **View All** opens the full list, where you can search and filter.
- This screen shows no money and no stock. Invoices live under Finance and cold storage lives on the Storage Units screen.

4.2 Chapel

WHAT THIS SCREEN IS FOR

keeping a diary of your chapel, viewing rooms, reception halls and other spaces, so two funerals never end up booked into the same room at the same time.

HOW TO GET HERE

Sidebar → Chapel.

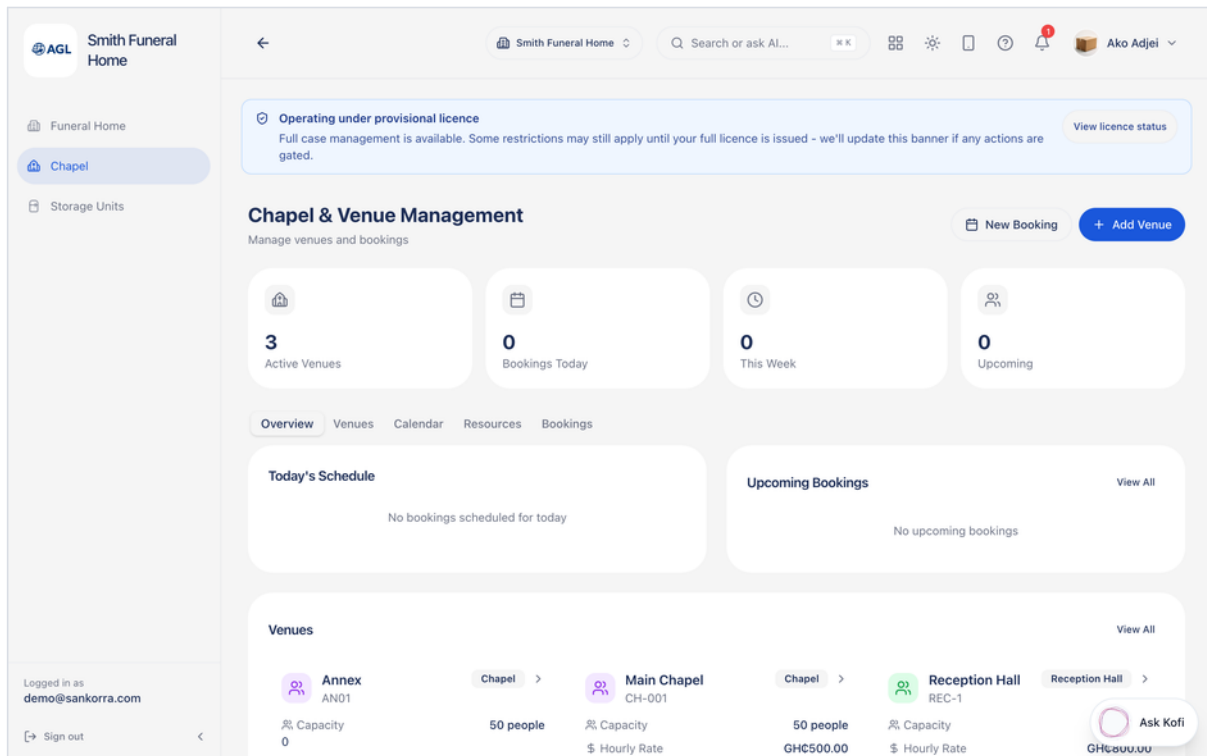
WHAT YOU SEE ON THE SCREEN

The heading **Chapel & Venue Management** — "Manage venues and bookings" — with two buttons on the right: **New Booking** and **Add Venue**.

Four counters: **Active Venues**, **Bookings Today, This Week** and **Upcoming**.

Then five tabs: **Overview**, **Venues**, **Calendar**, **Resources** and **Bookings**.

- **Overview** shows **Today's Schedule** (each booking with the venue name, the kind of booking, the start and end time and a status label), **Upcoming Bookings** for the next seven days (up to five, with a **View All** button), and a **Venues** panel showing your first six venues.
- **Venues** shows a card for each venue that is in use. Each card carries the venue name, the venue code, a label for its type, the **Capacity** in people, the **Hourly Rate** if one is set, the **Buffer** in minutes if one is set, the location, and up to three amenities. At the foot of each card are **Edit** and **Set schedule**.
- **Calendar** shows one month at a time — every booking across every venue — with buttons to step to the previous or next month.
- **Resources** lists shared staff and equipment (a head usher, a sound system, a projector) that more than one venue uses.
- **Bookings** is the full list, with filters for **Venue**, **Type** and **Status**, and columns for Date & Time, Venue, Type, Contact, Attendees and Status. Action buttons sit at the end of each line.



Chapel screen on the Overview tab showing today's schedule, upcoming bookings and venue cards

WHAT YOU CAN DO HERE

To add a venue:

- 1 Press **Add Venue**.
- 2 Type the **Venue Name**, for example "Main Chapel".
- 3 Type a **Venue Code**, for example "CH-001".
- 4 Choose the **Venue Type**: Chapel, Viewing Room, Reception Hall, Meeting Room or Outdoor Area.
- 5 Type the **Capacity** — how many people the room seats.
- 6 Fill in any of **Hourly Rate**, **Half-Day Rate** and **Full-Day Rate** in GH¢. These may be left empty.
- 7 In **Buffer between bookings (minutes)**, type the cleaning and setting-up gap you need between two bookings. Leave it at 0 for back-to-back bookings.
- 8 Add a **Location Description** if the venue is hard to find.
- 9 Type each amenity in the **Amenities** box and press **Add** after each one.
- 10 Press **Add Venue**.

To set a venue's opening hours:

- 1 Go to the **Venues** tab.
- 2 On the venue's card, press **Set schedule**.
- 3 Switch on each day the venue is open and type the start and end time for each opening window.
- 4 To copy Monday's hours to Tuesday through Friday, press the apply button above the days. Monday must be switched on first.

5 To close for one particular day, or to open at unusual hours on one day, add a

special-hours override: choose the date, either mark it closed or type the open and close times, and add a short note such as "Christmas Day".

1 Press the save button.

To take a booking:

1 Press **New Booking**.

2 Choose the **Venue**.

3 Choose the **Booking Type**: Funeral Service, Memorial, Viewing, Reception, Meeting or Other.

4 Choose the **Date**, the **Start** time and the **End** time.

5 Type the number of attendees expected.

6 Fill in the **Contact Name**, **Contact Phone** and **Contact Email** of the family member who is booking.

7 Tick **Catering** or **A/V equipment** if either is needed, and write what is needed in the note box that appears.

8 Add any **Special Requirements**.

9 Fill in **Total Cost** and **Deposit** in GH¢ if you have agreed a price, and tick the deposit box once the deposit is in hand.

10 Press the save button.

To approve a booking a family asked for:

1 Go to the **Bookings** tab.

2 Find a line whose status is **pending**.

3 Press the green tick.

4 Fill in **Total cost (GHS)** and **Deposit due (GHS)** if you want the family to see the price, or leave both empty.

5 Press **Approve & send quote** (or **Approve booking** if you left the amounts empty). The family is notified.

To decline a booking a family asked for:

1 On a **pending** line, press the red circle-and-bar button.

2 Type the reason in the small box that opens. A reason is required.

3 Press OK. The family is notified and sees the reason; the reason also appears under the status on the line.

To tie a booking to a funeral case:

1 On a **confirmed** line, press the chain-link button.

2 Search for and choose the case.

3 Confirm.

To finish or cancel a booking:

1 On a **confirmed** line, press the circled tick to mark it complete, or the cross to cancel it.

To add a shared resource:

1 Go to the **Resources** tab.

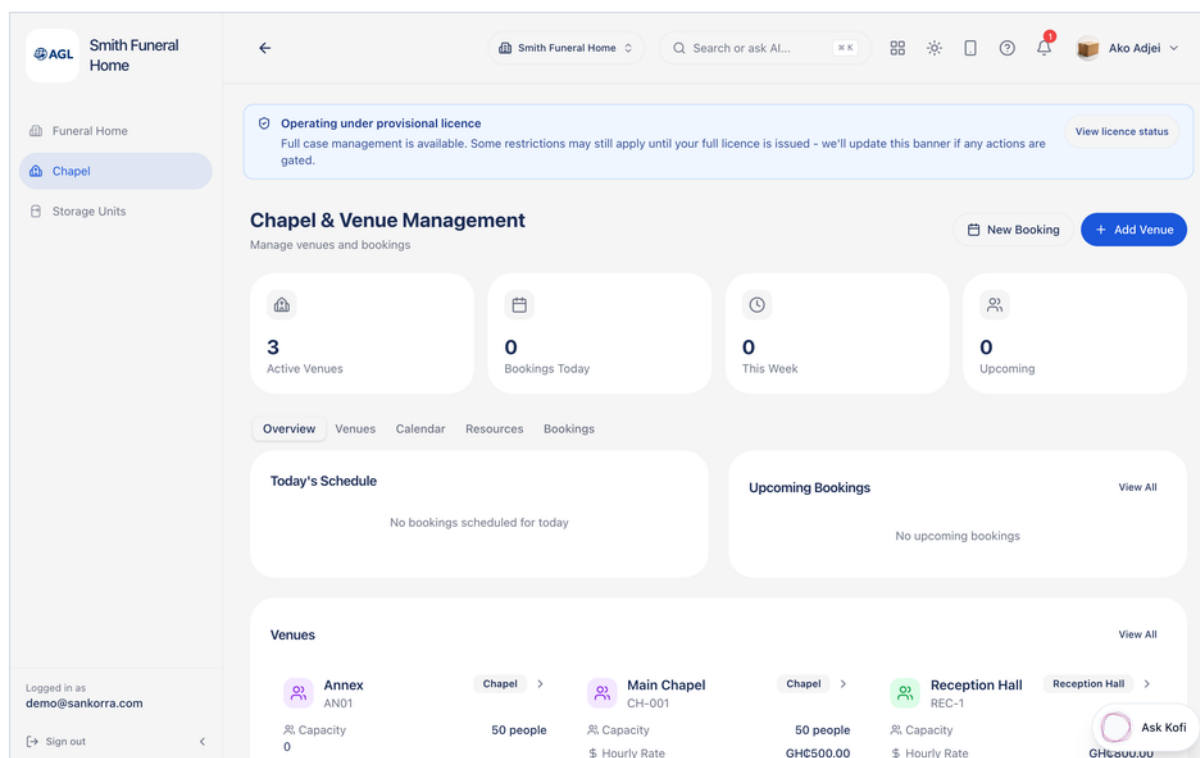
2 Press **Add Resource**.

3 Give it a name, say whether it is staff or equipment, and attach it to the venues that use it.

4 Save.

Good to know

- Bookings you make yourself with **New Booking** are **confirmed** straight away. Only bookings that come in from a family arrive as **pending** and need approving.
- What the status labels mean: **pending** (amber, waiting for you), **confirmed** (blue, agreed), **in progress** (blue, happening now), **completed** (green) and **cancelled** (red).
- If the venue is already booked for hours that overlap, the booking is refused — but no message appears. The window simply stays open and nothing is saved. Check the **Calendar** tab for a free slot and try again.
- If you enter more attendees than the venue seats, a warning appears saying that overbooking can breach fire-safety limits. You may still go ahead.
- The buffer works both ways. With a 30-minute buffer, a booking from 10:00 to 12:00 blocks any new booking between 09:30 and 12:30.
- Two bookings that would need the same shared resource at the same time are refused automatically. A resource that is not attached to any venue is never checked, and its card says so.
- A new venue starts with opening hours of Monday to Saturday, 08:00 to 18:00. Use **Set schedule** to replace that with your real hours.
- A venue code must be unique. If you reuse one, the message says "A venue with this code already exists. Pick a different Venue Code."
- Saving a venue needs the right permission. If you see a message about permission, ask an owner, administrator or manager to save it for you.
- **Virtual tour gallery** on the venue form, and the button to share a livestream link with a family, only appear on plans that include them.



The Approve booking window with the total cost and deposit fields

4.3 Cemetery

WHAT THIS SCREEN IS FOR

laying out your cemetery in sections and plots, holding plots for families, and scheduling and completing burials.

HOW TO GET HERE

Sidebar → Cemetery.

WHAT YOU SEE ON THE SCREEN

The heading **Cemetery Management** — "Manage plots, reservations, and burials" — with an **Add Section** button.

Four counters: **Total Plots**, **Available Plots**, **Reserved Plots** and **Upcoming Burials**.

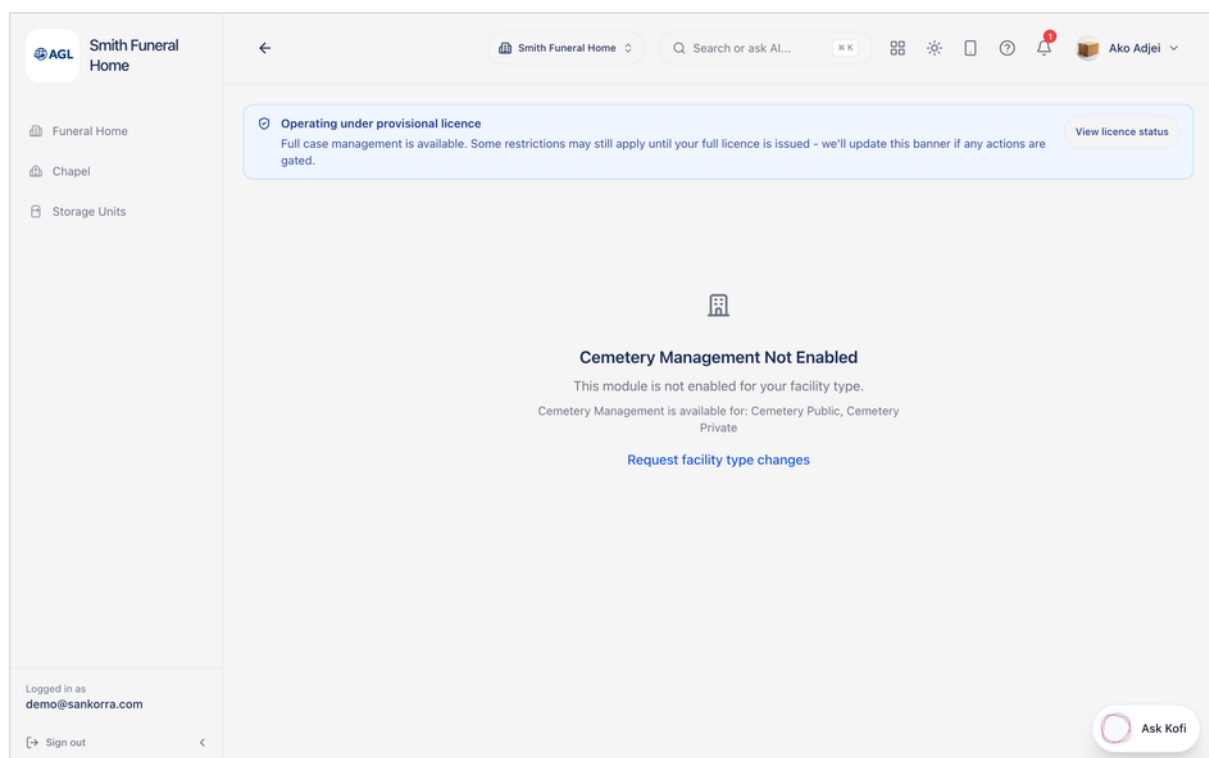
Then six tabs: **Overview**, **Map**, **Sections**, **Plots**, **Burials** and **Reservations**.

- **Overview** has **Upcoming Burials** on the left — the next 30 days, five at a time, each showing the name of the deceased, the section and plot, and how soon it is ("Today", "Tomorrow", "In 4 days", "In ~3 weeks") above the full date and time. Below those, in violet with a **Needs scheduling** label, sit burial dates the family sent in from the mobile app: these have a date but no plot yet, and pressing one opens the case. On the right is a month **calendar** with a legend for Scheduled, Completed and Family-submitted (needs scheduling). Under those, a preview of the **Cemetery Plot Map**, and then **Cemetery Sections** showing your first six sections.
- **Map** shows the same plot map full size. Only plots that have been pinned on the map appear here.

- **Sections** shows a card for each section, with an **Add Section** button.
- **Plots** shows every plot as a small coloured square carrying its plot number, with filters for **Section** and **Status**.
- **Burials** is a list with a search box for the name of the deceased and a status filter, and columns for Date, Deceased, Plot, Type and Status.
- **Reservations** is a list with a search box and a status filter, and columns for Date, Reserved For, Plot, Expires, Deposit and Status.

Plot colours on the **Plots** tab:

Colour	Status
Green	Available
Amber	Reserved
Grey	Occupied
Red	Maintenance



Cemetery screen on the Overview tab with upcoming burials, the month calendar and the plot map

WHAT YOU CAN DO HERE

To add a section:

- 1 Press **Add Section**.
- 2 Type the **Section Name**, for example "Garden of Peace".
- 3 Type a **Section Code**, for example "SEC-A".
- 4 Choose the **Section Type**: Lawn, Garden, Mausoleum, Columbarium or Memorial Wall.

- 5** Type the **Total Plots** you expect the section to hold and the **Price Per Plot** in GH¢.
- 6** Add a **Location Description** if it helps staff find the section.
- 7** Save.

To create many plots at once:

- 1** Go to the **Sections** tab and press the section you want to fill. You land on the **Plots** tab with that section named at the top.
- 2** Press **Generate plots**.
- 3** Type **How many**. The most you can create in one go is 2,000; split larger sections into several batches.
- 4** Choose the **Plot type**: Single, Double, Family, Cremation Niche or Memorial.
- 5** Under **Numbering**, type a prefix such as "A-" and the number to start at. A preview of the first few plot numbers appears underneath.
- 6** Leave **Price per plot** empty to use the section's price, or type a different price.
- 7** Optionally type **Columns per row** so the plots lay out in rows.
- 8** Optionally pin the section's corners: walk to two opposite corners with your phone and pin each one under **Grid GPS**. This needs **Columns per row** to be filled in as well, and it spreads the plots evenly across the rectangle.
- 9** Press the create button.

To add one plot on its own:

- 1** On the **Plots** tab, with a section chosen, press **Add plot**.
- 2** Type the **Plot number**, choose the **Plot type**, and fill in the **Row**, **Column**, **Price** and **Notes** if you want them.
- 3** Save.

To correct a plot or pin it on the map:

- 1** On the **Plots** tab, rest your finger or pointer on the plot and press the small pencil that appears at its corner.
- 2** Change the **Plot type**, **Row**, **Column**, **Price** or **Notes**, and pin the plot's position on the map.
- 3** Save.

To hold a plot for a family:

- 1** On the **Plots** tab, press a **green** (available) plot.
- 2** In **Reserved For**, type the name of the family member making the reservation.
- 3** Fill in **Contact Information** (a phone number or an email address).
- 4** Set **Reservation Expires** if the hold runs out on a date.
- 5** Fill in the **Deposit Amount** in GH¢ and tick **Deposit Paid** once it is received.
- 6** Add any notes and press **Create Reservation**. The plot turns amber.

To schedule a burial:

- 1 On the **Plots** tab, press an **amber** (reserved) plot.
- 2 If the plot is reserved, an amber panel at the top names the family member who reserved it, with their phone number, the reservation date and its expiry.
- 3 If the reservation is already tied to a case, the deceased's name, date of birth and date of death are filled in for you. If it is not, and the system finds a case with a matching phone number or name, those appear as **Possible matches in your cases** with a **Link** button beside each.
- 4 Type or check the **Deceased Name**, **Date of Birth** and **Date of Death**.
- 5 Set the **Burial Date** and, if you know it, the **Burial Time**.
- 6 Choose the **Burial Type** from your facility's list.
- 7 Fill in the **Officiant**, **Funeral Home**, **Burial Permit Number** and **Notes** as needed.
- 8 Save. The reservation is converted and the burial now appears under **Upcoming Burials**.

To complete a burial:

- 1 Either press the burial under **Upcoming Burials** on the Overview tab and then press **Mark complete** in the panel that opens, or go to the **Burials** tab and press a **scheduled** line.
- 2 Tick **Headstone installed** if it is in place, and fill in the **Inscription**, **Material** and **Install Date**.
- 3 Add any **Completion Notes** and save.

To tie a reservation to a funeral case:

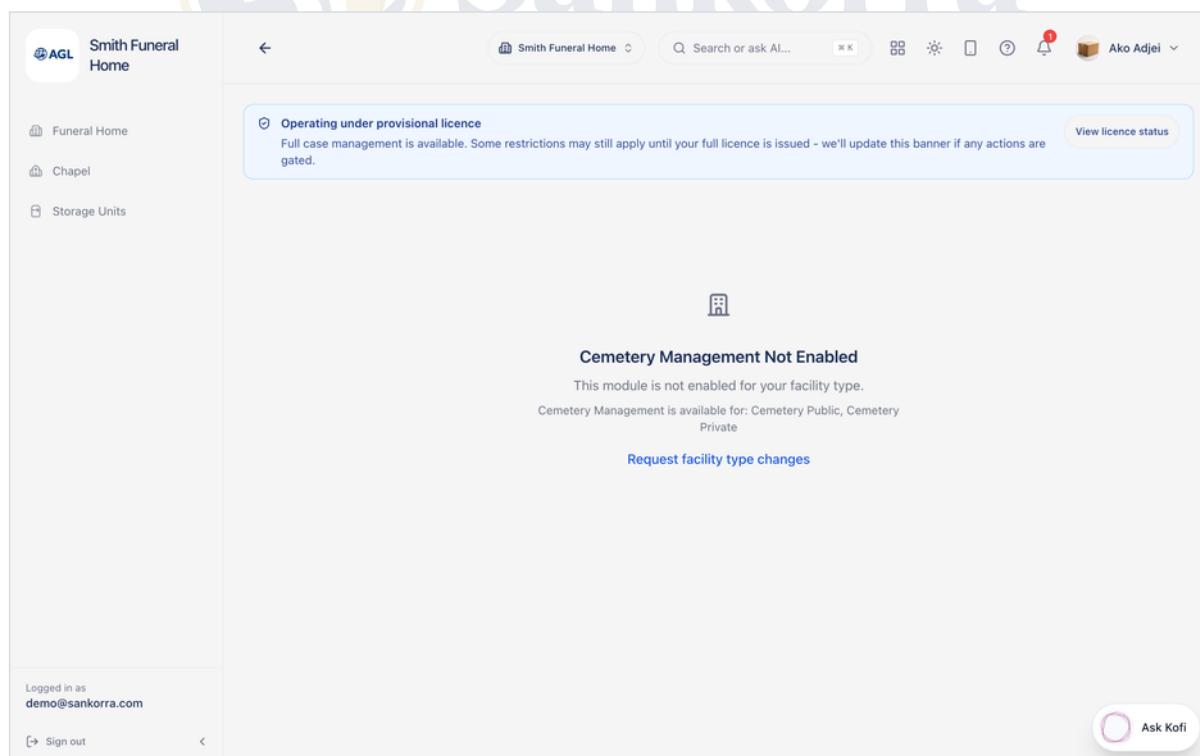
- 1 Go to the **Reservations** tab.
- 2 On an **active** line, press the chain-link button.
- 3 Search for and choose the case, then confirm.

To decline a reservation a family asked for:

- 1 On an **active** line on the **Reservations** tab, press the red circle-and-bar button.
- 2 Type the reason. A reason is required.
- 3 Press OK. The family is notified, the reason is shown under the status, and the plot goes back to **available**.

Good to know

- **Reserved For** is the family member who made the reservation. It is **not** the name of the person who will be buried there. Never copy it into the **Deceased Name** field.
- A plot's status changes by itself as you work: reserving turns it amber, scheduling and completing a burial turns it grey. On the Edit plot window you can only choose **Available** or **Maintenance**; reserved and occupied are managed from the Reservations and Burials tabs.
- **Add plot** and **Generate plots** only appear once you have picked a section. Until then the Plots tab says "Pick a section on the Sections tab to add or generate plots into it."
- The price is copied onto each plot when it is created. Changing a section's price later does not change plots that already exist.
- The **Reserve Plot** and **Schedule Burial** windows do not show an error if saving fails. If the window is still open after you press the save button and nothing has changed, nothing was saved — reload the page and try again.
- On the **map**, occupied plots are **indigo**, not grey. The colours for available (green), reserved (amber) and maintenance (red) are the same as on the Plots tab.
- A plot only appears on the map once it has been pinned, either by pinning the two section corners when generating, or one plot at a time through **Edit plot**.
- The violet **Needs scheduling** lines are burial dates families sent from the mobile app. They have no plot yet, so they will not appear in the Burials list until you schedule them against a plot.
- **Edit plot** and other cemetery changes need permission to manage the cemetery. If a button does nothing, ask your administrator to check your permissions.



The Plots tab showing a section's plots as coloured squares with the section summary above

4.4 Columbarium

WHAT THIS SCREEN IS FOR

keeping a list of your urn niches and whether each one is free, held or in use.

HOW TO GET HERE

Sidebar → Columbarium.

WHAT YOU SEE ON THE SCREEN

The heading **Columbarium** — "Manage urn niches, inurnment records, and niche sales" — with an **Add Niche** button.

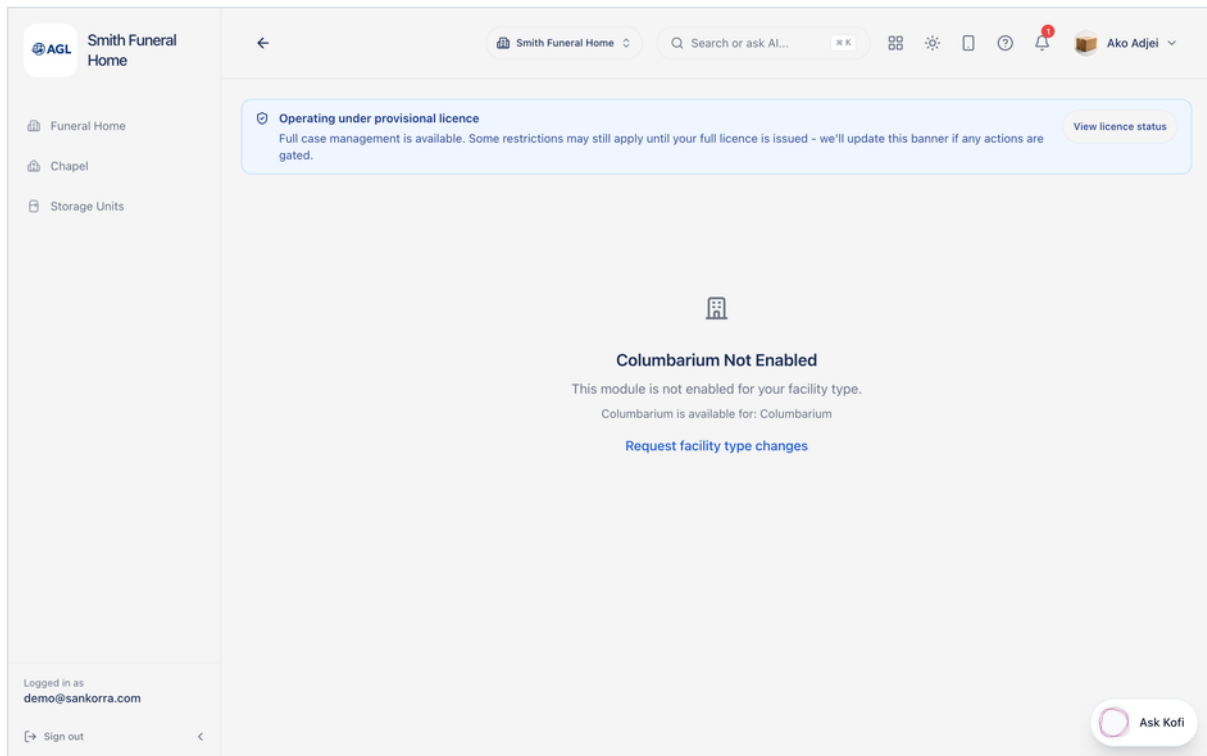
Four counters: **Total Niches**, **Available**, **Occupied** and **Reserved**.

A **Niche Capacity** panel — "Overall columbarium utilization" — reading "X of Y niches occupied" with a percentage and a bar.

A search box marked "Search niches..." and a **Refresh** button.

Niche Directory — "All columbarium niches and their status" — a card for each niche showing the niche code, the location, **Capacity** as "used / total", a **Status** label, and a small bar. A menu at the top right of each card offers **Edit** and **Delete**.

Colour	Status
Green	Available
Blue	Occupied
Amber	Reserved
Grey	Maintenance



Columbarium screen with the four counters, the capacity bar and the niche cards

WHAT YOU CAN DO HERE

To add a niche:

- 1 Press **Add Niche**.
- 2 Type the **Niche Code**, for example "N-A-001".
- 3 Type the **Capacity** — how many urns the niche holds. The smallest allowed is 1.
- 4 Type the **Location**, for example "Section A, Row 1".
- 5 Add any **Notes**.
- 6 Press **Add Niche**.

To change a niche's status:

- 1 On the niche's card, press the menu at the top right and choose **Edit**.
- 2 Choose the new **Status**: Available, Occupied, Reserved or Maintenance.
- 3 Press **Update Niche**.

To remove a niche:

- 1 Press the menu on the card and choose **Delete**.
- 2 Confirm when asked "Are you sure you want to delete this niche?"

Good to know

- A niche you have just added is always **Available**, even if you picked another status on the form. Set the status you want by editing the niche afterwards.
- This screen tracks the niches themselves. There is no field here for the family or the case a niche belongs to — write the name in the niche's **Notes** so other staff can see it.
- Deleting a niche cannot be undone from this screen.
- The **Capacity** bar on each card shows how full that one niche is; the panel at the top shows how full the whole columbarium is.

4.5 Mausoleum

WHAT THIS SCREEN IS FOR

keeping a list of your crypts and whether each one is free, held or in use.

HOW TO GET HERE

Sidebar → Mausoleum.

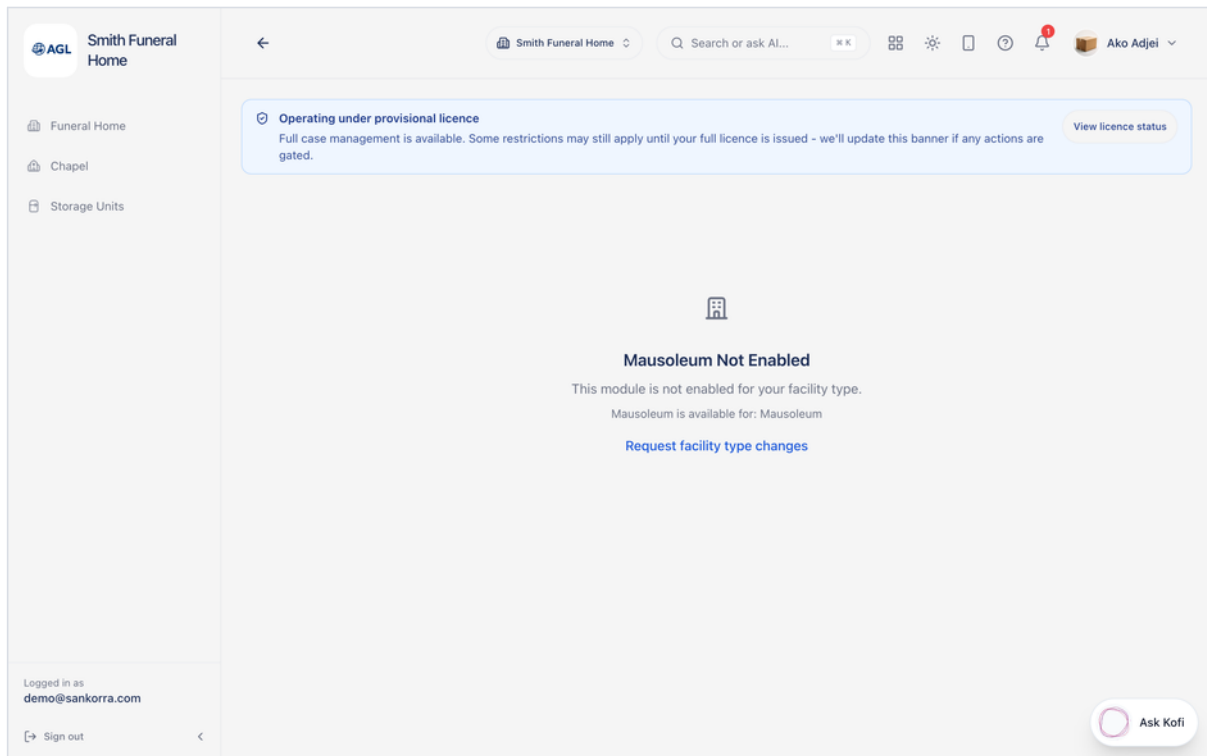
WHAT YOU SEE ON THE SCREEN

This screen works exactly like the Columbarium screen, with crypts in place of niches.

The heading **Mausoleum** — "Manage crypts, entombment records, and crypt sales" — with an **Add Crypt** button. Four counters: **Total Crypts**, **Available**, **Occupied** and **Reserved**. A **Crypt Capacity** panel reading "X of Y crypts occupied". A search box marked "Search crypts..." and a **Refresh** button. Then

Crypt Directory — "All mausoleum crypts and their status" — with one card per crypt showing the crypt code, the location, the capacity used out of total, a status label and a small bar, and a menu offering **Edit** and **Delete**.

The colours are the same as for niches: green for Available, blue for Occupied, amber for Reserved and grey for Maintenance.



Mausoleum screen with the four counters, the capacity bar and the crypt cards

WHAT YOU CAN DO HERE

To add a crypt:

- 1 Press **Add Crypt**.
- 2 Type the **Crypt Code**, for example "C-A-001".
- 3 Type the **Capacity**. The smallest allowed is 1.
- 4 Type the **Location**, for example "Wing A, Level 2".
- 5 Add any **Notes** and press **Add Crypt**.

To change a crypt's status, or to remove one, use the menu at the top right of its card exactly as described for niches in section 4.4.

Good to know

- As with niches, a new crypt is always created as **Available**. Edit it afterwards to set another status.
- There is no field here for the family or the case a crypt belongs to. Write the name in the crypt's **Notes**.

4.6 Cremation

WHAT THIS SCREEN IS FOR

booking cremations, saying who operated the chamber, and writing down what happened afterwards.

HOW TO GET HERE

Sidebar → Cremation.

WHAT YOU SEE ON THE SCREEN

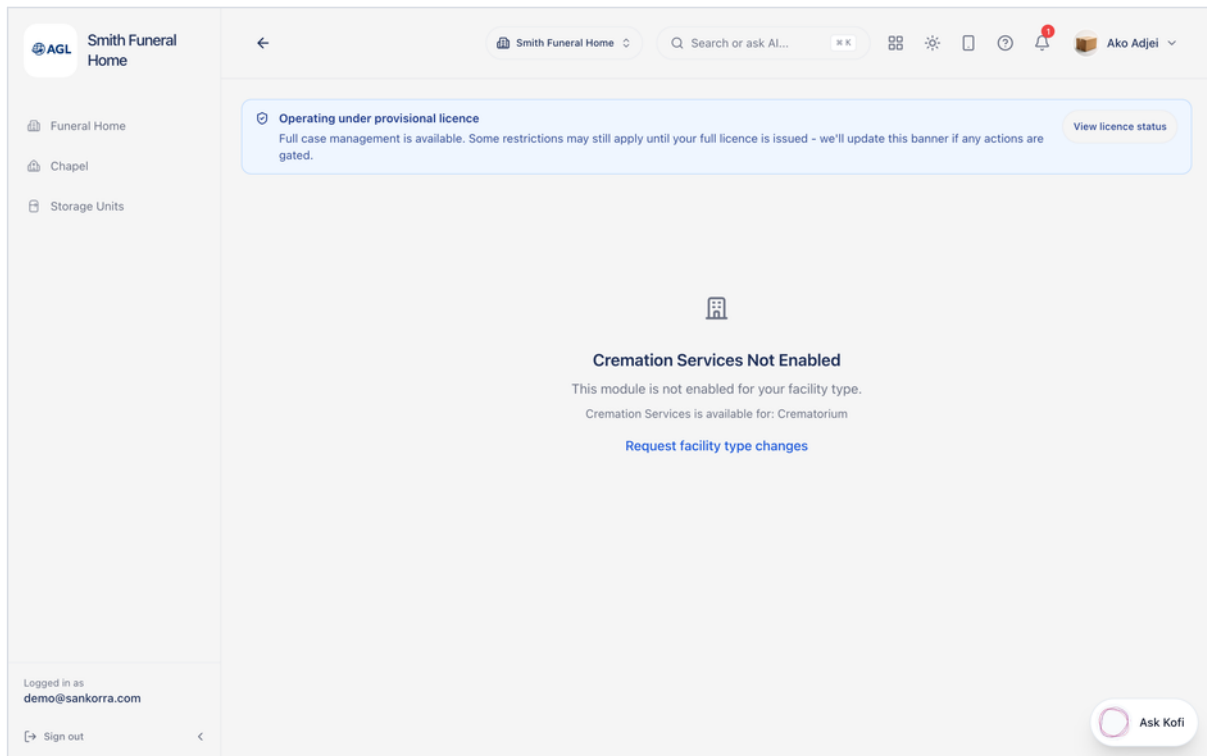
The heading **Cremation** — "Schedule cremations, log operator and chamber activity, record completion details." — with **Refresh** and **Schedule Cremation** buttons.

Three counters: **Scheduled today**, **In progress** and **Completed this month**.

A row of filter buttons: **All**, **Scheduled**, **In progress**, **Completed** and **Cancelled**.

Then one card per cremation. Each card shows its own number, a status label, an **Urn issued** label where that applies, the case number and the deceased's name where a case is linked, and then **Scheduled**, **Operator** and **Chamber**. Once it is completed you also see **Completed**, the remains weight in kilograms and the peak temperature in degrees Celsius; while it is under way you see **Started** instead. A menu at the top right of each card holds the actions.

Colour	Status
Amber	Scheduled
Blue	In progress
Green	Completed
Grey	Cancelled



Cremation screen with the three counters, the status filter buttons and several cremation cards

WHAT YOU CAN DO HERE

To book a cremation:

- 1 Press **Schedule Cremation**.
- 2 Choose the **Case** if there is one. Leave it as "- No case -" if there is not.
- 3 Set the **Date** and the **Time**.
- 4 Choose the **Operator** from your staff, or leave it as "- Unassigned -".
- 5 Type the **Chamber / Unit**, for example "Chamber A".
- 6 Add any **Notes** and press **Schedule**.

To start a cremation:

- 1 Press the menu on a **Scheduled** card.
- 2 Choose **Start**. The card turns blue and shows the time it started.

To write down what happened:

- 1 Press the menu on a **Scheduled** or **In progress** card.
- 2 Choose **Complete**.
- 3 Fill in the **Remains weight (kg)** and the **Peak temperature (°C)**.
- 4 Tick **Urn issued to family** once the urn has been handed over.
- 5 Paste a **Certificate URL** if the certificate is stored online.
- 6 Add any **Notes** and press **Mark Completed**.

To cancel a cremation:

- 1 Press the menu and choose **Cancel**.

2 Confirm when asked.

To move a cremation out of the list:

- 1 Press the menu and choose **Delete**.
- 2 Confirm when asked "Move ... to the recycle bin?" The entry goes to the recycle bin, where an administrator can still find it.

Good to know

- Times default to now if you leave them blank when completing.
- You can go straight from **Scheduled** to **Complete** without pressing **Start** first, if the cremation is already finished by the time you get to the screen.
- **Cancel** is not offered on a cremation that is already completed or already cancelled.
- The list only shows cremations whose status matches the filter button you have pressed. Press **All** if a cremation seems to be missing.
- Only staff marked as active can be chosen as the operator.
- The **Certificate URL** field needs a full web address. A file on your own computer cannot be attached here.

4.7 Storage Units

WHAT THIS SCREEN IS FOR

cold storage. It shows every refrigerator, freezer and cold room you have, which compartment each body is in, and the temperature readings that prove the units were kept cold.

HOW TO GET HERE

Sidebar → Storage Units. (Older links and QR labels pointing at "/mortuary" land here as well.)

WHAT YOU SEE ON THE SCREEN

The heading **Storage Units** — "Manage storage units, occupancy, and temperature monitoring". On the right, while you are on the Storage Units tab, two buttons switch the view between **Dashboard** and **Grid View**.

Below that, two tabs: **Storage Units** and **Temperature**.

The Storage Units tab, Dashboard view

Along the top: **Scan**, **QR Labels**, **Refresh** and **Add Unit**.

If any unit is full or nearly full, a banner appears: red and headed "Storage at capacity", or amber and headed "Storage nearing capacity" once a unit passes nine tenths full. It names the unit codes concerned.

Then three rows of figures:

Figure	What it tells you
UTILIZATION	How full your cold storage is, as a percentage
AVAILABLE	Free slots out of total slots

Figure	What it tells you
INTAKE TODAY / RELEASES TODAY	Bodies in and out today, with a daily average
UNITS IN SERVICE	Units not under maintenance, out of the total
INTAKE WEEK / MONTH, RELEASES WEEK / MONTH	The same counts over longer periods

Next, the **STORAGE AVAILABILITY MAP**. Four large counts sit across the top — Available, Occupied, Reserved and Maint. — and below them each unit is drawn as a small cabinet face, one panel per unit, with every compartment in its real row and column position. Each compartment shows its code on a name plate and a small coloured light in the corner. Viewing rooms and preparation rooms are drawn as a single room outline instead of a grid. A legend and the words "N slots across M units" sit at the bottom.

To the right, **UNIT TYPE DISTRIBUTION** — a ring chart of how many units you have of each type.

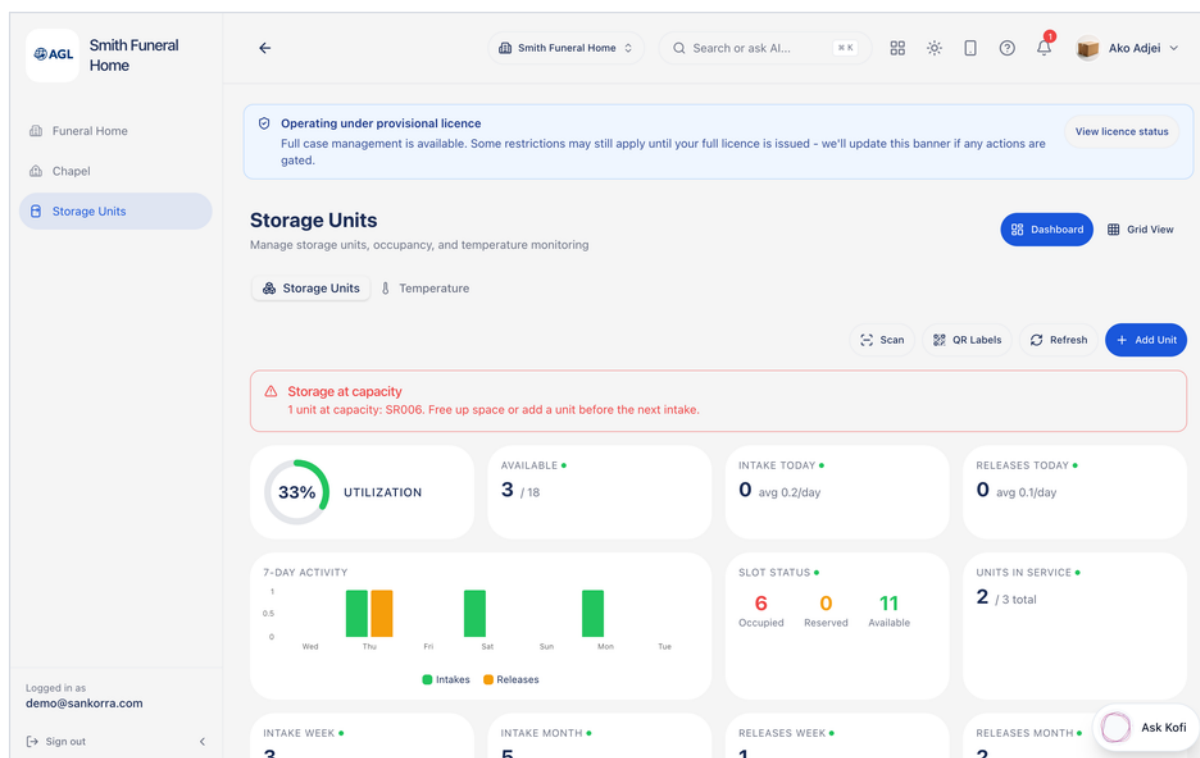
Below that, the **STORAGE UNITS** table — the first six units, with Name, Occupancy, Capacity, Type, Temp and Status. The occupancy percentage is green below seven tenths full, amber from seven tenths, and red from nine tenths. Beside it, **RECENT ACTIVITY** lists the latest arrivals and releases.

The Storage Units tab, Grid View

Five figures across the top — Total Units, Total Capacity, Occupied, Available Slots and Maintenance Impact — then a search box and filters for **Unit Type** and **Status**, a card for each unit, and a **Status Legend**.

Compartment colours — the same everywhere on this screen

Colour	Status	What it means
Green	Available	Free; you may assign a body to it
Red	Occupied	A body is in it
Amber	Reserved	Held open; no body in it yet
Violet, with diagonal stripes	Maintenance	Out of use while being worked on
Grey	Out of service	Out of use, longer term



Storage Units dashboard with the utilisation figures and the storage availability map

WHAT YOU CAN DO HERE

To add a storage unit:

- 1 Press **Add Unit**.
- 2 Type the **Unit Code**, for example "R-001".
- 3 Choose the **Unit Type**: Refrigerator, Freezer, Viewing Room, Preparation Room or Cold Room.
- 4 Type the **Capacity** — how many bodies the unit holds.
- 5 Type the **Location**, for example "Building A, Room 101".
- 6 Type the **Temperature Range**, for example "2-8°C". Read the warning about this under "Good to know".
- 7 Add any **Notes** and press **Create Unit**.

To add the compartments inside a unit:

- 1 Press the unit, either in the **STORAGE UNITS** table or on its card in Grid View.
- 2 Stay on the **Compartments** tab.
- 3 Press **Add Compartment**, or press the + in an empty position in the cabinet drawing.
- 4 Type the **Compartment Code** — the system suggests one such as "A1".
- 5 Type a **Label** if it helps, such as "Top Left".
- 6 Check the **Row Index** and **Column Index**. The system suggests the next free position.
- 7 Press **Add Compartment**.

To put a body into a compartment:

- 1 Press the unit to open it, then press **Assign Case**. (You can also open a green compartment and press **Assign Case** there.)
- 2 In step 1, search for the case by name or case number and press the line for the right one. A priority label appears beside each case.
- 3 Press **Next: Select Compartment**.
- 4 In step 2, press a green compartment.
- 5 Type any **Assignment Notes**.
- 6 Press **Assign to Compartment**.

To release a body:

- 1 Press the occupied compartment, or open the unit and go to its **Current Cases** tab.
- 2 Press **Release**.
- 3 Confirm when asked. The compartment turns green.

To hold a compartment open without a body in it:

- 1 Press a green compartment.
- 2 Press **Reserve**. It turns amber.
- 3 To free it again, press it and press **Unreserve**.

To take a compartment or a unit out of use:

- 1 Press the compartment and press **Set Maintenance**, or open the unit and press **Set to Maintenance**.
- 2 If other compartments in that unit are still occupied or reserved, a warning headed **Unit still in use** lists them. You may press **Set to maintenance anyway**, but the whole unit stops accepting bodies.
- 3 To bring it back, press **Mark Available**.

To print labels and use them:

- 1 Press **QR Labels** to print a label sheet for your units.
- 2 Stick each label on its unit.
- 3 Later, press **Scan** and point the camera at a label to open that unit straight away.

To fix an occupancy figure that looks wrong:

- 1 Open the unit. If the figures disagree, a panel headed **Data Inconsistency Detected** appears, showing the recorded number and the real number.
- 2 Press **Fix Data**. The recorded figure is corrected to match the compartments.

To log a temperature reading:

- 1 Press the **Temperature** tab.
- 2 Press **Log Temperature**, or press **Log Reading** on the unit's line in the **Current Unit Status** table.
- 3 Choose the **Storage Unit** and the **Date**.

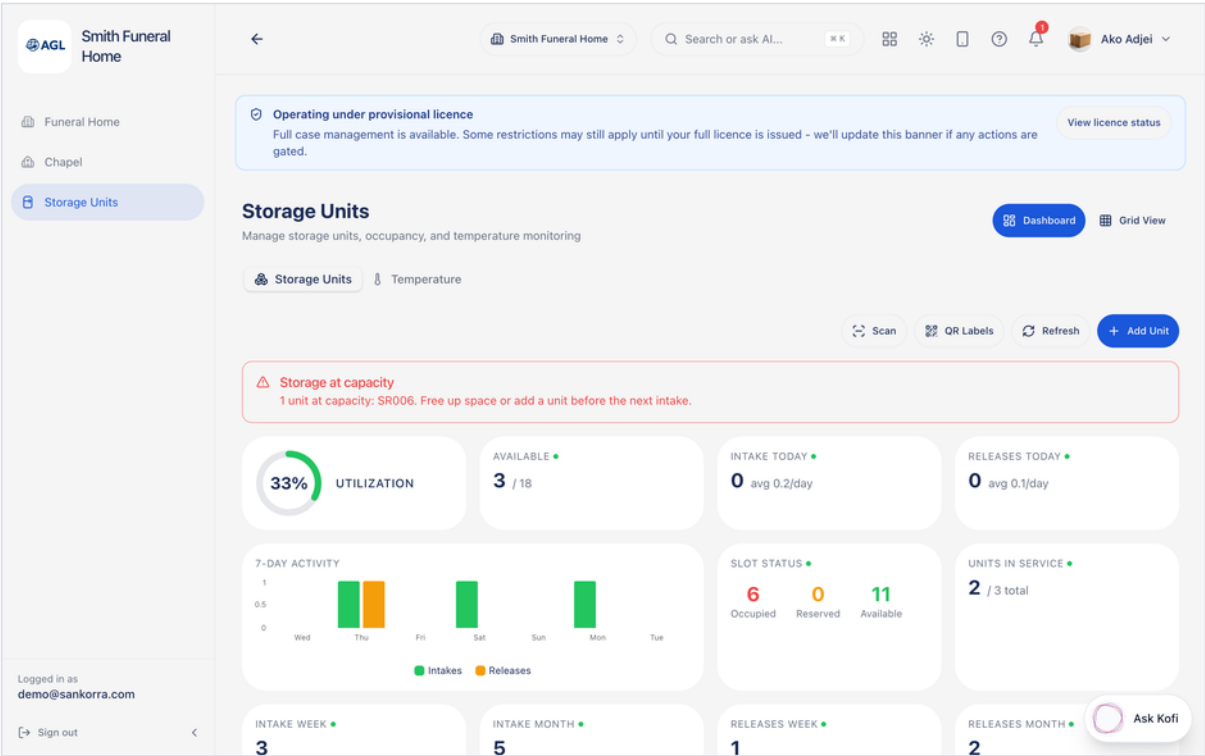
- 4** Choose the **Reading Type** — morning or evening.
- 5** Type the **Temperature (°C)**.
- 6** Type your **Initials**, up to ten letters.
- 7** Add any **Notes** and press **Log Reading**.

To produce the temperature paperwork:

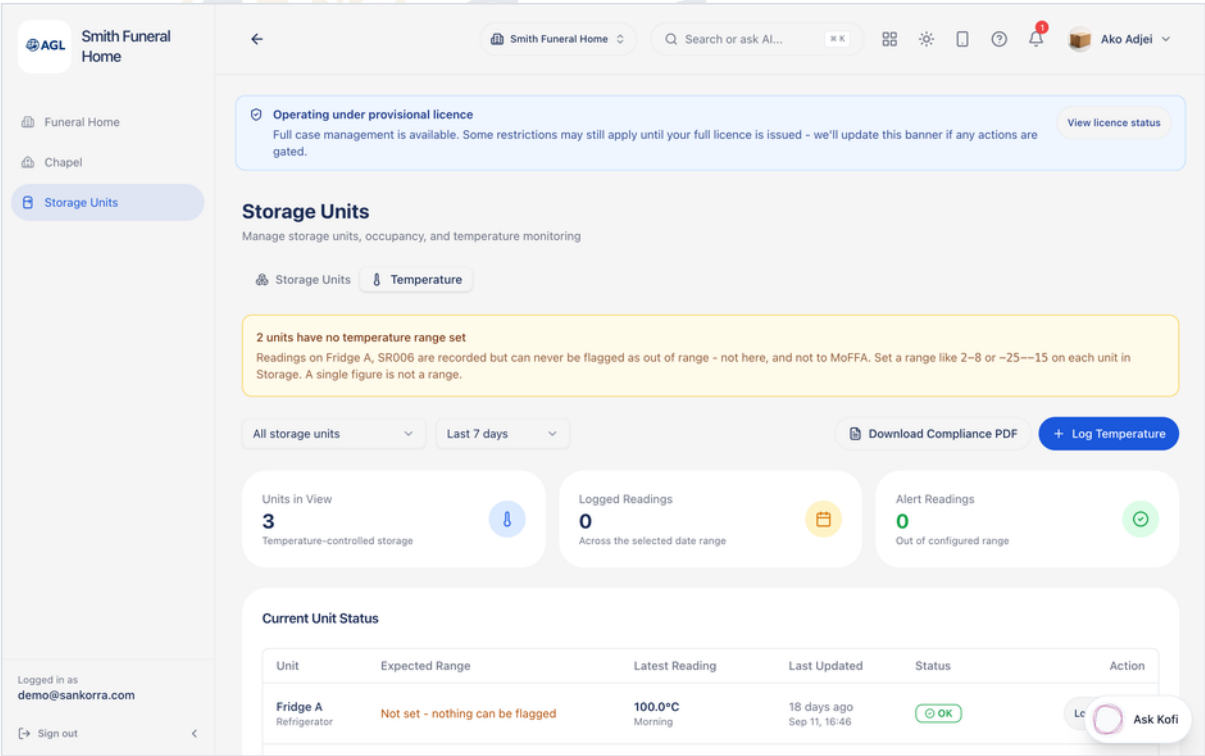
- 1** On the **Temperature** tab, choose the unit (or "All storage units") and the period: last 7, 14 or 30 days.
- 2** Press **Download Compliance PDF**. If you press it the moment the page opens you may see "Loading branding, try again in a moment." — wait a second and press again.

Good to know

- **Marking one compartment for maintenance puts the whole unit under maintenance.** Every other free compartment in that unit stops accepting bodies until you mark the unit available again.
- While a unit is under maintenance or out of service, its free compartments are drawn in the unit's colour, not green, and the **Assign Case** and **Reserve** buttons are hidden. A note inside the compartment explains why.
- You cannot delete a compartment while a body is in it. The screen says "Release the case before deleting this compartment." The same goes for deleting a whole unit.
- Deleting a compartment or a unit cannot be undone.
- Only **refrigerators**, **freezers** and **cold rooms** appear on the **Temperature** tab. Viewing rooms and preparation rooms are not temperature-monitored.
- **A unit with no temperature range is a hole in your monitoring.** Readings are still saved, but they can never be marked out of range — not on this screen and not to the regulator. An amber banner names any unit missing a range. Write a range such as **2-8** or **-25--15**. **A single figure is not a range.**
- On the **Current Unit Status** table, **Missing** means no reading in the last 30 days, **Alert** means the last reading was outside the unit's range, and **OK** means it was inside. Sort order puts alerts first, then normal readings, then units with no reading at all.
- How often readings are expected is set under Settings → Temperature Monitoring, which is only on plans that include temperature monitoring. Ask your administrator.
- Only cases not already in storage appear in the **Assign Case** list. If a case is missing from the list, it is probably already in a compartment somewhere.
- When a unit has only one free slot left, the assign window warns you: "This is the last available slot in this unit."



A storage unit opened on the Compartments tab, showing the cabinet grid with tier letters and coloured compartments



The Temperature tab with the three summary figures, the Current Unit Status table and the daily temperature log

CHAPTER 5

Inventory

Inventory covers everything you keep in stock: caskets and urns you sell to families, and the embalming fluid, gloves and tools your own staff consume. The **INVENTORY** heading in the sidebar has two entries — **Inventory** and

Inventory Reports — and the rest of the inventory screens are reached from the row of shortcuts on the Inventory dashboard. If the whole INVENTORY heading is missing from your sidebar, the inventory feature has not been installed for your facility; ask your administrator, who can add it from the Download Center.

Throughout these screens, items are of two kinds:

- **Resale** items are sold to families — caskets, urns, wreaths. These have a cost and a selling price.
- **Facility use** items are consumed by your own staff — embalming supplies, protective clothing, tools. These have a cost only.

5.1 Inventory Dashboard

WHAT THIS SCREEN IS FOR

one page that answers "what is running out", "what is my stock worth" and "what did we sell".

HOW TO GET HERE

Sidebar → Inventory.

WHAT YOU SEE ON THE SCREEN

The heading **Inventory Dashboard**. On the right, a period chooser — **Last 7 days**, **Last 30 days**, **Last 90 days** or **Year to date** — and a **Manage items** button.

Below that, three tabs that reshape the whole page: **All inventory**, **Resale** and **Facility use**.

Then a row of five shortcuts: **Items**, **Receipts**, **Suppliers**, **Retail sales** and **Reports**.

If anything is low or out of stock, a **Low Stock Alert** banner appears naming up to three items and how many are left, with "+N more" if there are others. You can close the banner with the cross; it comes back when you reload the page.

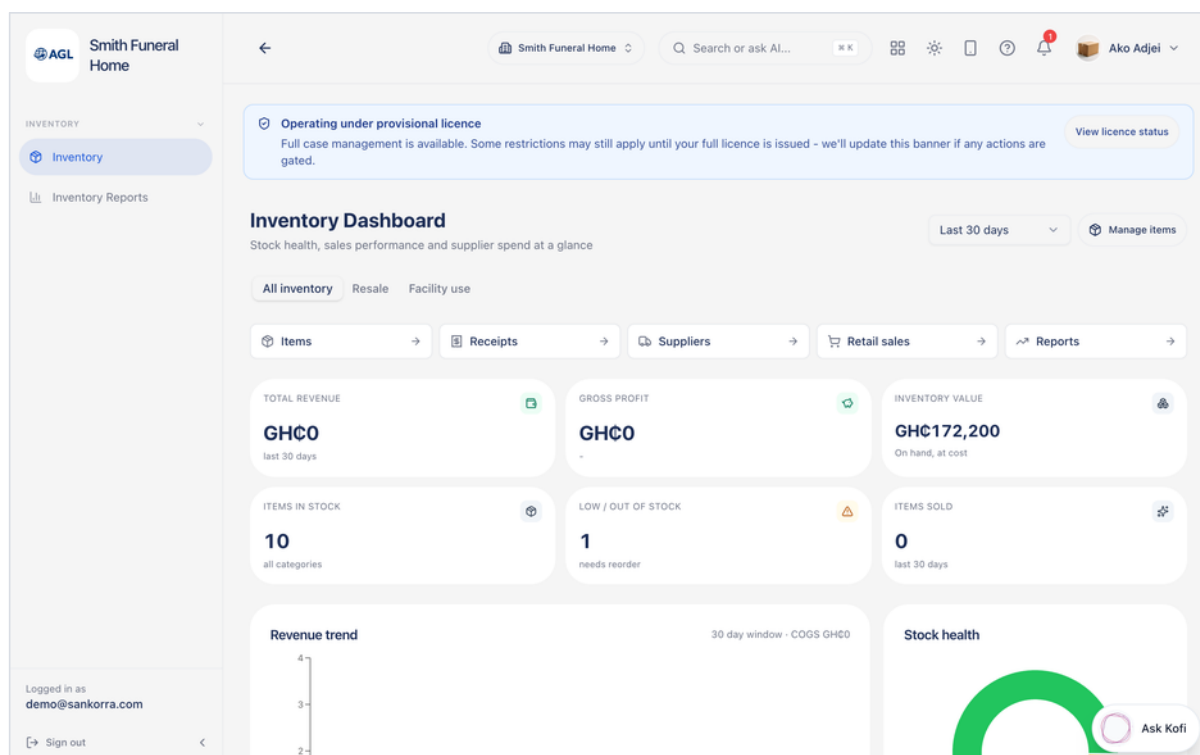
Then six figures. On the **All inventory** and **Resale** tabs they are:

Figure	What it tells you
Total revenue / Resale revenue	What you sold over the chosen period, in GH¢
Gross profit	Revenue less the cost of what you sold, with the margin as a percentage

Figure	What it tells you
Inventory value / Resale stock value	What your stock on hand is worth, at cost
Items in stock	How many different items you hold
Low / out of stock	How many items need reordering, and how many are at zero
Items sold	How many units moved over the chosen period

On the **Facility use** tab, revenue, profit and items sold make no sense, so they are replaced by **Stock value**, **Items tracked**, **Low / out of stock**, **Below reorder**, **Categories used** and **Avg unit cost**.

Under the figures are charts. On **All inventory** and **Resale** you get a **Revenue trend**, a **Stock health** ring, **Top items · gross profit**, **Stock value · by qty** and **Top suppliers · spend**. On **Facility use** the revenue chart is replaced by **Top items · stock value**. At the foot of the page, **Recent retail sales** lists the last five sales with a link to the full list.



Inventory Dashboard on the All inventory tab, showing the shortcuts row, the six figures and the revenue chart

WHAT YOU CAN DO HERE

To look at only one kind of stock:

- 1 Press **Resale** to see only what you sell, or **Facility use** to see only what your staff consume.
- 2 Press **All inventory** to go back.

To change the period the money figures cover:

- 1 Press the period chooser at the top right.

- 2** Choose **Last 7 days**, **Last 30 days**, **Last 90 days** or **Year to date**. The revenue, profit, items-sold and supplier-spend figures all follow your choice.

To act on a low-stock warning:

- 1** Read the item names on the **Low Stock Alert** banner.
- 2** Press **Manage items** or the **Items** shortcut.
- 3** Order more from the supplier, then book the delivery in (see section 5.4).

Good to know

- The stock figures — value, items in stock, low and out of stock — are always as at this moment. Only the money figures follow the period chooser.
- **Inventory value** is worked out at what the stock cost you, not at what you sell it for.
- **Low / out of stock** counts items at or below their minimum quantity. **Below reorder** counts items that have reached their reorder point, which is a separate figure on each item.
- The five shortcuts are the only route to Suppliers, Receipts and Retail sales from the sidebar; those screens have no sidebar entry of their own.

5.2 Inventory Items

WHAT THIS SCREEN IS FOR

the master list of everything you stock: adding items, grouping them into categories, correcting quantities and seeing an item's history.

HOW TO GET HERE

Sidebar → Inventory, then **Manage items** or the **Items** shortcut.

WHAT YOU SEE ON THE SCREEN

The heading **Inventory Items** — "Manage supplies, products, and equipment" — with **Dashboard**, **Categories** and **Add Item** buttons.

Four filters across the page: a search box for "Search items by name or SKU...", a **Category** chooser, a **Status** chooser (All Status, In Stock, Low Stock, Out of Stock) and a **Type** chooser (All Types, Resale Items, Facility Use).

Then the table, headed **Inventory Items (N)**, with a tick box at the start of each line and columns for Item, Category, Price, Qty, Status, Location and Updated, plus an actions menu at the end.

On each line, the item's name carries a **Resale** label if you sell it and a **Shop** label if it is showing on your public shop page. A warning triangle appears in amber for low stock and red for none left. The SKU sits under the name. **Price** shows the selling price for resale items with the cost underneath, or just the cost for facility-use items. **Qty** shows what you hold with the minimum after the slash.

Status	Meaning
In Stock (green)	More than the minimum quantity on hand
Low Stock (amber)	At or below the minimum quantity
Out of Stock (red)	None left

Ticking one or more lines brings up a bar with **Publish to storefront**, **Hide from storefront** and **Clear**.

Inventory Items
Manage supplies, products, and equipment

Search items by name or SKU...

All Categories | All Status | All Types

Item	Category	Price	Qty	Status	Location	Updated	Actions
Brass Memorial Urn URN-BRS-001	-	GH¢1,200.00 Cost: GH¢700.00	4 / 1	In Stock	-	Sep 10, 2026	...
Cedar Elite Casket CSK-CED-001	-	GH¢7,200.00 Cost: GH¢4,300.00	5 / 1	In Stock	-	Jun 27, 2026	...
Ceramic Heritage Urn URN-CER-001	-	GH¢600.00 Cost: GH¢340.00	14 / 1	In Stock	-	Jun 27, 2026	...
Compact Brass Keepsake Urn URN-BRS-002	-	GH¢450.00 Cost: GH¢250.00	20 / 1	In Stock	-	Jun 22, 2026	...
Hardwood Memorial Urn URN-HRD-001	-	GH¢850.00 Cost: GH¢480.00	8 / 1	In Stock	-	Jun 27, 2026	...
Madar Detergent MD-01	-	GH¢300.00	10 / 20	Low Stock	Warehouse A	Sep 11, 2026	...
Mahogany Premium Casket	-	GH¢8,500.00	1 / 1	In Stock	-	Jun 27, 2026	...

Inventory Items table with the filters above it and the status labels on each line

WHAT YOU CAN DO HERE

To add an item:

- 1 Press **Add Item**.
- 2 Type the **Name** and, if you use them, the **SKU** and **Description**.
- 3 Choose the **Category** and the **Unit** (piece, box and so on).
- 4 Type the **Current Qty**, the **Min Qty**, the **Reorder Point** and the **Max Qty**.
- 5 Switch on **Resale** if you sell this item to families. Leave it off for items your own staff consume.
- 6 Type the **Unit Cost (GHS)** and, for a resale item, the **Selling Price (GHS)**.
- 7 Fill in the **Storage Location**, **Supplier** and **Barcode** if you use them.
- 8 Add any **Internal Notes**. These are never shown to families.
- 9 To offer the item on your public shop page, switch on the public-listing setting, add a product image and choose a **Storefront category**.
- 10 Save.

To group items:

- 1 Press **Categories**.
- 2 Press the add button, type a **Name** and an optional **Description**, and save.
- 3 Use the pencil and bin buttons beside an existing category to rename or remove it.

To move stock in or out of an item

- 1 Find the item in the table.
- 2 Press the actions menu at the end of the line and choose **Adjust Stock**.
- 3 Choose the **Transaction Type**:

Type	Use it for	Effect
Receipt	Stock arriving from a purchase or delivery	Adds
Usage	Stock used on a case or a service	Takes away
Adjustment	Correcting the count after a stock count	Adds
Return	Putting back stock that was issued and not used	Adds
Transfer Out	Moving stock to another location	Takes away
Write Off	Damaged or expired stock	Takes away

- 1 Type the **Quantity**. The words underneath tell you what the new quantity will be before you save.
- 2 For a **Receipt**, check the **Unit Cost (GHS)**.
- 3 Choose the **Reference Type** — None, Case, Purchase Order or Manual Entry — and type the **Reference #**, for example the case number or "PO-001".
- 4 Add any **Notes** and press **Record Transaction**.

To see everything that has happened to an item:

- 1 Press the actions menu on the item's line.
- 2 Choose **View History**.

To show or hide items on your public shop page:

- 1 Tick the items in the table.
- 2 Press **Publish to storefront** and choose the shop category to put them in, or choose **Publish without changing category**.
- 3 To take them down again, tick them and press **Hide from storefront**.

To remove an item:

- 1 Press the actions menu and choose **Delete**.

2 Confirm. This cannot be undone.

Good to know

- **Issuing stock to a case is done with the Usage type.** Choose **Case** as the Reference Type and **type the case number** into Reference #. There is no drop-down list of cases here, so type the number carefully — a wrong number cannot be matched back to the case later.
- **A stock count correction can only go up.** The **Adjustment** type adds the quantity you type, and the smallest quantity the form accepts is 1. If a count shows you have **less** than the system says, use **Write Off** (for stock that is gone) or **Usage** (for stock that was used and not logged) instead.
- If you try to take out more than you hold, the screen says "Insufficient stock — Only N units available." and nothing is saved.
- **Low Stock** is driven by the item's **Min Qty**. If an item never warns you, its Min Qty is probably 0.
- **Publish to storefront** needs at least one shop category to exist. If the menu says "Add categories first in Settings", ask your administrator to add shop categories.
- Stock also leaves by itself when an item is sold on a retail sale or billed on a case invoice. You do not need to log Usage for those.
- The tick boxes only select the lines on the page you are looking at.

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INVENTORY

Inventory

Inventory Reports

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Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Inventory Items
Manage supplies, products, and equipment

← Dashboard Categories + Add Item

Search items by name or SKU...

All Categories All Status All Types

Inventory Items (10)

Item	Category	Price	Qty	Status	Location	Updated	Actions
☐ Brass Memorial Urn Resale Shop URN-BRS-001	-	GH¢1,200.00 Cost: GH¢700.00	4 / 1	In Stock	-	Sep 10, 2026	...
☐ Cedar Elite Casket Resale Shop CSK-CED-001	-	GH¢7,200.00 Cost: GH¢4,300.00	5 / 1	In Stock	-	Jun 27, 2026	...
☐ Ceramic Heritage Urn Resale Shop URN-CER-001	-	GH¢600.00 Cost: GH¢340.00	14 / 1	In Stock	-	Jun 27, 2026	...
☐ Compact Brass Keepsake Urn Resale Shop URN-BRS-002	-	GH¢450.00 Cost: GH¢250.00	20 / 1	In Stock	-	Jun 22, 2026	...
☐ Hardwood Memorial Urn Resale Shop URN-HRD-001	-	GH¢850.00 Cost: GH¢480.00	8 / 1	In Stock	-	Jun 27, 2026	...
☐ Madar Detergent MD-01	-	GH¢300.00	10 / 20	Low Stock	Warehouse A	Sep 11, 2026	...
☐ Mahogany Premium Casket Resale Shop	-	GH¢8,500.00	0 / 1	In Stock	-	Jun 27, 2026	...

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Sign out

Ask Kofi

The Record Transaction window with the transaction type chosen and the new-quantity line showing

5.3 Suppliers

WHAT THIS SCREEN IS FOR

the vendors you buy stock from, what you owe each one, and each one's statement.

HOW TO GET HERE

Sidebar → Inventory, then the **Suppliers** shortcut.

WHAT YOU SEE ON THE SCREEN

The heading **Suppliers** — "Vendors you buy inventory from, with running balance and statement" — and a button to add one.

A search box for name, contact, email or phone, and a status filter with **All statuses**, **Active** and **Inactive**.

The table has columns for Supplier, Contact, **Outstanding**, **Total Supplied**, **Total Paid** and Status, with a remove button at the end of each line.

Pressing a supplier opens that supplier's own page, which shows the balance, a **Recent receipts** panel, a **Recent payments** panel, the supplier's **Contact** details, and a **statement** you can run between two dates and export.

Suppliers
Vendors you buy inventory from, with running balance and statement

Search by name, contact, email, phone

All statuses

Supplier	Contact	Outstanding	Total Supplied	Total Paid	Status
ABC Casket Imports Ltd VAT: C0000123456	Kwame Mensah sales@abccaskets.com.gh +233 24 555 0101	GHS 25,140.00	GHS 50,140.00	GHS 25,000.00	inactive
Global Mortuary Equipment Co.	Daniel Kim orders@globalmortuary.com +1 415 555 0199	USD 220.00	USD 720.00	USD 500.00	active
Holy Spirit Funeral Supplies	Ama Boateng orders@holyspiritsupplies.com +233 20 555 0234	GHS 0.00	GHS 5,520.00	GHS 5,520.00	active
Premier Embalming Chemicals Ltd VAT: C0000789012	Yaw Osei accounts@premierchem.com.gh +233 27 555 0567	GHS 4,025.00	GHS 4,025.00	GHS 3,200.00	active

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View licence status

+ Add Supplier

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Sign out

Ask Kofi

Suppliers table showing outstanding balances and status labels

WHAT YOU CAN DO HERE

To add a supplier:

- 1 Press the add button.
- 2 Type the supplier's **name**, for example "ABC Casket Imports Ltd".
- 3 Fill in the contact details and choose the **currency** the supplier invoices in.

4 Set the status to **Active**.

5 Save.

To see what you owe a supplier:

1 Press the supplier's name in the table.

2 Read the balance at the top, and the **Recent receipts** and **Recent payments** panels.

To produce a statement:

1 On the supplier's page, set the **From** and **To** dates.

2 Press the export button. A spreadsheet file downloads with the date, reference, description, debit, credit and running balance of every line.

To undo a payment entered in error:

1 On the supplier's page, find the payment under **Recent payments**.

2 Press the reverse button beside it.

3 Type a reason if you wish and confirm.

Good to know

- Reversing a payment does **not** delete it. The original payment stays on the statement for audit, a reversing line is added, and the supplier's outstanding balance goes back up by that amount.
- A supplier's currency is fixed per supplier. If you buy from suppliers in different currencies, the outstanding totals are shown separately per currency and never added together.
- Only **Active** suppliers can be chosen when booking a delivery.
- Removing a supplier hides them from the list. Their receipts and statement stay.

5.4 Inventory Receipts

WHAT THIS SCREEN IS FOR

booking in stock that has arrived from a supplier. This is what sets the cost of each batch, which is what your profit figures are worked out from.

HOW TO GET HERE

Sidebar → Inventory, then the **Receipts** shortcut.

WHAT YOU SEE ON THE SCREEN

The heading **Inventory Receipts** — "Every stock booking from a supplier — drives the per-batch cost basis used for COGS." — with a **Book Receipt** button.

A search box for receipt number, supplier or supplier invoice number, and a status filter with **All statuses**, **Posted** and **Cancelled**.

The table has columns for Receipt #, Date, Supplier, Supplier invoice, Lines, Subtotal, VAT, Total and Status. **Posted** means the delivery is booked in; **Cancelled** means it was reversed. The receipt number and the supplier name are both links.

Inventory Receipts

Every stock booking from a supplier - drives the per-batch cost basis used for COGS.

Search by receipt #, supplier, invoice #

Receipt #	Date	Supplier	Supplier invoice	Line s	Subtotal	VAT	Total	Status
RCP-20260617-0001	6/17/2026	ABC Casket Imports Ltd	ABC-INV-78112	1	GHS 8,800.00	GHS 1,320.00	GHS 10,120.00	Poste d
RCP-20260607-0003	6/7/2026	Premier Embalming Chemicals Ltd	PRM-2026-1102	1	GHS 3,500.00	GHS 525.00	GHS 4,025.00	Poste d
RCP-20260528-0001	5/28/2026	ABC Casket Imports Ltd	ABC-INV-77890	1	GHS 15,300.00	GHS 2,295.00	GHS 17,595.00	Poste d
RCP-20260518-0002	5/18/2026	Holy Spirit Funeral Supplies	HSS-2026-088	2	GHS 4,800.00	GHS 720.00	GHS 5,520.00	Poste d
RCP-20260428-0001	4/28/2026	ABC Casket Imports Ltd	ABC-INV-77501	2	GHS 19,500.00	GHS 2,925.00	GHS 22,425.00	Poste d
RCP-20260329-0004	3/29/2026	Global Mortuary Equipment Co.	GME-26-0334	1	USD 720.00	USD 0.00	USD 720.00	Ask Kofi

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Inventory Receipts table with posted receipts and their totals

WHAT YOU CAN DO HERE

To book a delivery in:

- 1 Press **Book Receipt**.
- 2 Choose the **Supplier**. The supplier's current outstanding balance appears underneath.
- 3 Set the **Receipt date**.
- 4 Type the **Supplier invoice / waybill #** — their own reference. This is optional but makes disputes far easier.
- 5 Set the **Expected payment date** if you have agreed terms.
- 6 Add an internal **Note** if you need one.
- 7 Under **Line items**, for each line: choose the **Item**, leave **Batch #** as "Auto" or type your own, type the **Qty**, the **Unit cost** and the **VAT**, and set an **Expiry** date where the item has one.
- 8 Press **Add line** for each further item on the delivery.
- 9 Check the subtotal at the bottom and save.

Good to know

- You need at least one **active supplier** before you can book a delivery. If you have none, the screen says so and offers a link to add one. The same goes for inventory items — create the item first.
- Booking a receipt does three things at once: it creates the stock batches, it raises the quantity on hand, and it adds the amount to what you owe that supplier.
- The cost you type on each line is what that batch cost. When stock is later sold, the oldest batch is used first, and its cost is what your gross-profit figures use. Typing a wrong unit cost here makes your profit figures wrong for months.
- Every line needs an inventory item chosen. If you press save and nothing happens, the screen tells you which piece is missing: "Pick a supplier" or "Every line needs an inventory item".

The screenshot shows the 'Book Inventory Receipt' form. The 'Receipt details' section is filled with the following information:

- Supplier: Choose supplier (dropdown)
- Receipt date: 29.09.2026
- Supplier invoice / waybill #: Their reference (optional)
- Expected payment date: dd.mm.yyyy
- Notes: Optional internal note about this receipt

The 'Line items' section shows a table with one line item:

Item	Batch #	Qty	Unit cost	VAT	Total	Expiry
Disinfectant	1	1	0	0	0	

The Book Inventory Receipt form with the receipt details filled in and two line items

5.5 Retail Sales

WHAT THIS SCREEN IS FOR

selling an item over the counter when there is no funeral case involved: a family buying a wreath, a shop walk-in.

HOW TO GET HERE

Sidebar → Inventory, then the **Retail sales** shortcut.

WHAT YOU SEE ON THE SCREEN

The heading **Retail Sales** — "Standalone inventory sales — no case required. Each sale consumes batches FIFO and records COGS." — with a button to start a new sale.

The table has columns for Invoice #, Date, Customer, Subtotal, Tax, Total, Status and Case.

AGL Smith Funeral Home

INVENTORY

Inventory

Inventory Reports

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Sign out

Smith Funeral Home

Search or ask AI...

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View licence status

Retail Sales

Standalone inventory sales - no case required. Each sale consumes batches FIFO and records COGS.

+ New Retail Sale

Search by invoice #, customer name, phone, email

All statuses

Invoice #	Date	Customer	Subtotal	Tax	Total	Status	Case
RTS-20260625-0002	6/25/2026	Mrs. Esi Owusu +233 27 555 8802 esi.owusu@example.co	GHS 4,150.00	GHS 622.50	GHS 4,772.50	Partial	Attach
RTS-20260622-0001	6/22/2026	Mr. Akwasi Boahen +233 24 555 8801	GHS 1,800.00	GHS 270.00	GHS 2,070.00	Pending	Attach

Ask Kofi

Retail Sales table listing sales with their totals and statuses

WHAT YOU CAN DO HERE

To make a sale:

- 1

Press the new-sale button.
- 2

Enter the customer, then the items and quantities being sold.
- 3

Save the sale. An invoice is created, the stock comes off your on-hand quantity, and the sale appears in the **Sales** report.

- Good to know
- Each sale takes stock from the **oldest batch first**, so your cost of sales follows the order the stock actually arrived.
- Sales marked cancelled or void are left out of the dashboard's **Recent retail sales** panel, but they stay in this list.

5.6 Inventory Reports

WHAT THIS SCREEN IS FOR

four reports covering what you hold, what you sold, what your staff consumed and what you owe suppliers. Every one of them can be exported to a spreadsheet.

HOW TO GET HERE

Sidebar → Inventory Reports.

WHAT YOU SEE ON THE SCREEN

The heading **Supplier & Inventory Reports** — "On-hand value, resale sales with COGS, facility-use consumption, and supplier balances. Each tab exports to CSV." — with a **Manage suppliers** button.

Four tabs: **Inventory**, **Sales**, **Usage** and **Suppliers**. The Sales, Usage and Suppliers tabs each have **From** and **To** date boxes and an **Export CSV** button; the Inventory tab is always as at this moment.

What each report tells you

Inventory — what you are holding right now. Figures across the top: **Items**, **Units on hand**, **Stock value** (at batch cost) and **At/below threshold**. Buttons switch between **All**, **Resale** and **Facility use**. The table has Item, SKU, On hand, Batches, Cost value, Last received and Status.

Sales — what you sold, and what it cost you. Figures across the top: **Invoices** (with how many items moved), **Revenue**, **COGS** (the cost of the goods sold) and **Gross profit** (with the VAT collected noted underneath). The table has Item, Qty sold, Revenue, COGS, Gross profit, Margin % and Invoices. It covers both retail sales and items billed on case invoices.

Usage — what your own staff consumed. Figures across the top: **Items used**, **Consumption cost** (with the number of units), **Write-offs** (with the number of units) and **Total cost**. The table has Item, Category, Type (Usage or Write-off), Qty, Cost and Txns.

Suppliers — what you owe. An **Outstanding** figure per currency across the top. The table has Supplier, Outstanding, Total supplied, Total paid, Period supplied, Period paid, Period receipts and Period payments.

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Supplier & Inventory Reports

On-hand value, resale sales with COGS, facility-use consumption, and supplier balances. Each tab exports to CSV. [Manage suppliers](#)

Inventory Sales Usage Suppliers

ITEMS: 10 UNITS ON HAND: 26 STOCK VALUE: **GHS 47,920.00** (At batch cost basis) AT/BELOW THRESHOLD: 1

All Resale Facility use [Export CSV](#)

Item	SKU	On hand	Batches	Cost value	Last received	Status
Brass Memorial Urn	URN-BRS-001	4 piece	1	GHS 2,000.00	5/18/2026	OK
Cedar Elite Casket	CSK-CED-001	1 piece	1	GHS 3,500.00	6/7/2026	OK
Ceramic Heritage Urn	URN-CER-001	4 piece	1	USD 720.00	3/29/2026	OK
Compact Brass Keepsake Urn	URN-BRS-002	0 piece	0	GHS 0.00	-	OK
Hardwood Memorial Urn	URN-HRD-001	2 piece	1	GHS 1,200.00	5/18/2026	OK

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Supplier and Inventory Reports on the Inventory tab, showing the four figures and the item table

WHAT YOU CAN DO HERE

To run and export a report:

- 1 Press the tab you want.
- 2 On **Sales**, **Usage** or **Suppliers**, set the **From** and **To** dates.
- 3 On **Inventory**, press **All**, **Resale** or **Facility use**.
- 4 Press **Export CSV**. A spreadsheet file downloads, named after the report and the dates.

Good to know

- An empty report usually means the dates are too narrow, not that something is broken. Each tab says so: "Pick a wider date range..."
- The **Inventory** report ignores the dates entirely — it is always today's position.
- Stock value is always at **cost**, never at selling price.
- If you buy in more than one currency, totals are kept apart by currency. The large figure at the top of the Inventory report uses whichever currency most of your items are priced in; each line keeps its own.
- **COGS** means the cost of the goods you sold. **Gross profit** is revenue less COGS, before any of your other running costs.

CHAPTER 6

Fleet and maintenance

This chapter covers your vehicles, your drivers, and the upkeep of your building and equipment. **Hearse Fleet** and **Drivers** appear only if your facility has the hearse facility type switched on. **Maintenance** appears only if the facility maintenance feature has been installed for your facility; ask your administrator if the heading is missing.

6.1 Hearse Fleet

WHAT THIS SCREEN IS FOR

your vehicles, the trips they are booked for, and their service history. A trip is followed from the moment it is booked to the moment the vehicle comes back and the paperwork is filed.

HOW TO GET HERE

Sidebar → Hearse Fleet.

WHAT YOU SEE ON THE SCREEN

The heading **Fleet Management** — "Manage vehicles, assignments, and maintenance" — with **Log Maintenance** and **Add Vehicle** buttons.

Four counters: **Total Vehicles**, **Available**, **Today's Assignments** and **Maintenance Due**. Maintenance Due turns amber with a warning triangle when any vehicle is past its service date.

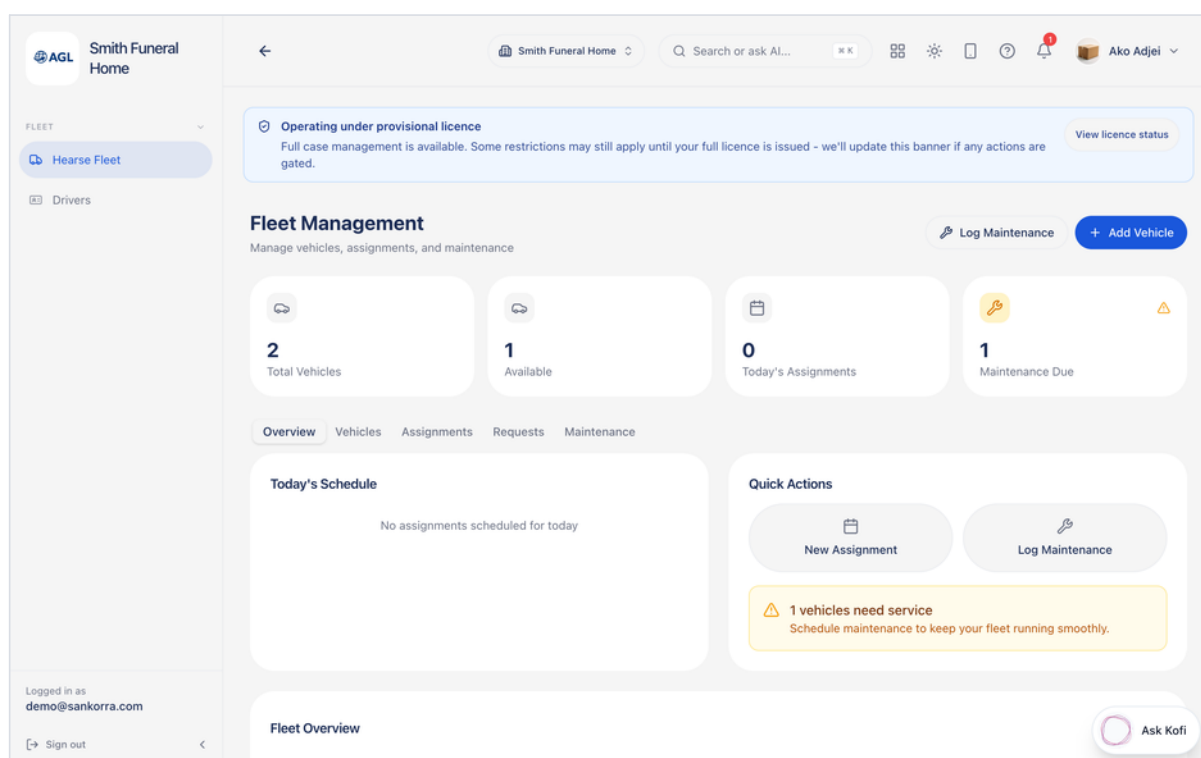
Five tabs: **Overview**, **Vehicles**, **Assignments**, **Requests** and **Maintenance**. The **Requests** tab carries an amber number when requests are waiting.

- **Overview** shows **Today's Schedule** on the left — each trip with the vehicle code, the kind of trip, the time and a status label — and **Quick Actions** on the right with **New Assignment** and **Log Maintenance**. If any vehicle is due for service, an amber note appears here too. Below, **Fleet Overview** shows your first six vehicles.
- **Vehicles** shows a card per vehicle with filters for search, **Status** and **Type**. Each card carries the vehicle code, the number plate, a status label, the **Type**, the **Make/Model** and year, the **Mileage** and the fuel type. If the vehicle is past its service date, an amber strip at the foot says "Service due" with the date.
- **Assignments** is the list of trips, with a status filter, and columns for Date, Vehicle, Type, Route (From and To) and Status. An eye button opens the trip; a cross cancels it.
- **Requests** lists hearse trips other facilities have asked you to carry out.
- **Maintenance** lists service history with columns for Date, Vehicle, Type, Description and Cost.

Vehicle status	Colour
Available	Green
Reserved	Yellow

Vehicle status	Colour
In Use	Blue
Maintenance	Amber
Retired	Grey

Vehicle types are Standard Hearse, VIP Hearse, Van Hearse, Family Escort, Limousine, Utility, Ambulance and Van. Trip types are Body Transfer, Funeral Procession, Family Transport and Other.



Hearse Fleet screen on the Overview tab with the four counters, today's schedule and the vehicle cards

WHAT YOU CAN DO HERE

To add a vehicle:

- 1 Press **Add Vehicle**.
- 2 Type the **Vehicle Code**, for example "HRS-001".
- 3 Choose the **Vehicle Type**.
- 4 Type the **License Plate**, for example "ABC 1234".
- 5 Fill in the **Make, Model, Year, Color** and **Capacity**.
- 6 Choose the **Fuel Type**: petrol, diesel, electric or hybrid.
- 7 Type the **Current Mileage (km)**.
- 8 Set the **Insurance Expiry** and the **Registration Expiry**.
- 9 Add any **Notes** and save.

To book a vehicle and driver for a removal or a funeral

- 1 Press **New Assignment**, on the Overview tab or the Assignments tab.
- 2 Choose the **Vehicle**.
- 3 Choose the **Assignment Type**: Body Transfer, Funeral Procession, Family Transport or Other.
- 4 Choose the **Driver**, or leave it as **Assign later**. Only drivers who are available appear in the list.
- 5 Set the **Date**, the **Start time** and the **End time**. All three are required.
- 6 Type the **Pickup Location** — a hospital name or address — and the **Destination** — the funeral home, the cemetery.

- 1 Add any **Notes** the driver needs.
- 2 To charge for the trip, choose what to **Bill against** from your service list. The catalogue price appears underneath, and you may type a different price.
- 3 If the trip is not on a case, name the person or organisation to bill, with their phone number and email address, or pick an existing client.
- 4 On a trip attached to a case, you can choose a step to **advance the case to** when the trip is closed. Leave it as "Don't auto-advance" if you would rather move the case by hand.
- 5 Save.

To run a trip from booking to closure

Open a trip by pressing its line on the **Assignments** tab or under **Today's Schedule**. A panel slides in from the side showing everything about the trip, with a **Lifecycle** section near the bottom. What you can do depends on the stage:

Stage shown	What you do next
Awaiting driver	Assign driver
Awaiting dispatch	Authorise dispatch — owners, administrators and managers only
Ready to start	Start trip , and enter the mileage as it leaves
In transit	Mark delivered , or Update location to drop a fresh pin
Delivered — awaiting return	Record return
Returned — awaiting closure	Tick the closure checklist, then Close trip
Closed / Cancelled	Nothing further

- **Vehicle** — Vehicle cleaned, Fuel tank filled, Vehicle inspected, No damage reported, Maintenance issues logged (if any)
- **Documentation** — Journey sheet completed, Driver log book completed, Dispatch records filed, Delivery confirmation signed
- **Driver** — Driver returned keys, Driver submitted trip report

- 1** On **Assign driver**, choose the driver from the list.
- 2** On **Authorise dispatch**, type the dispatch slip or journey sheet number if you use one, for example "DSP-2026-0142".
- 3** On **Start trip**, type the mileage reading in kilometres and the fuel level as a percentage at departure.
- 4** On **Mark delivered**, type the mileage at delivery, then the **Name** and **Role / relationship** of the person who received the body — for example "Pastor John Mensah", "Pastor" — and any notes.
- 5** On **Record return**, type the **Mileage in (km)**, the **Fuel level (%)** and the vehicle's condition: any dents, mechanical trouble, cleanliness.
- 6** Work down the **Closure checklist**. It has three groups:
- 7** Press **Close trip**. It stays greyed out until every item is ticked, and the count beside it shows how far you have got.

Once dispatch has been authorised, three more buttons appear near the top of the panel:

- **Print dispatch slip** — prints the slip for the driver to carry.
- **Text reading link to driver** — sends the driver a link by text message so they can enter the real odometer and fuel reading from their own phone. The driver must have a phone number on file.
- **Attach signed slip** — files the signed slip against the case. This only works on a trip that is attached to a case.

To log a service:

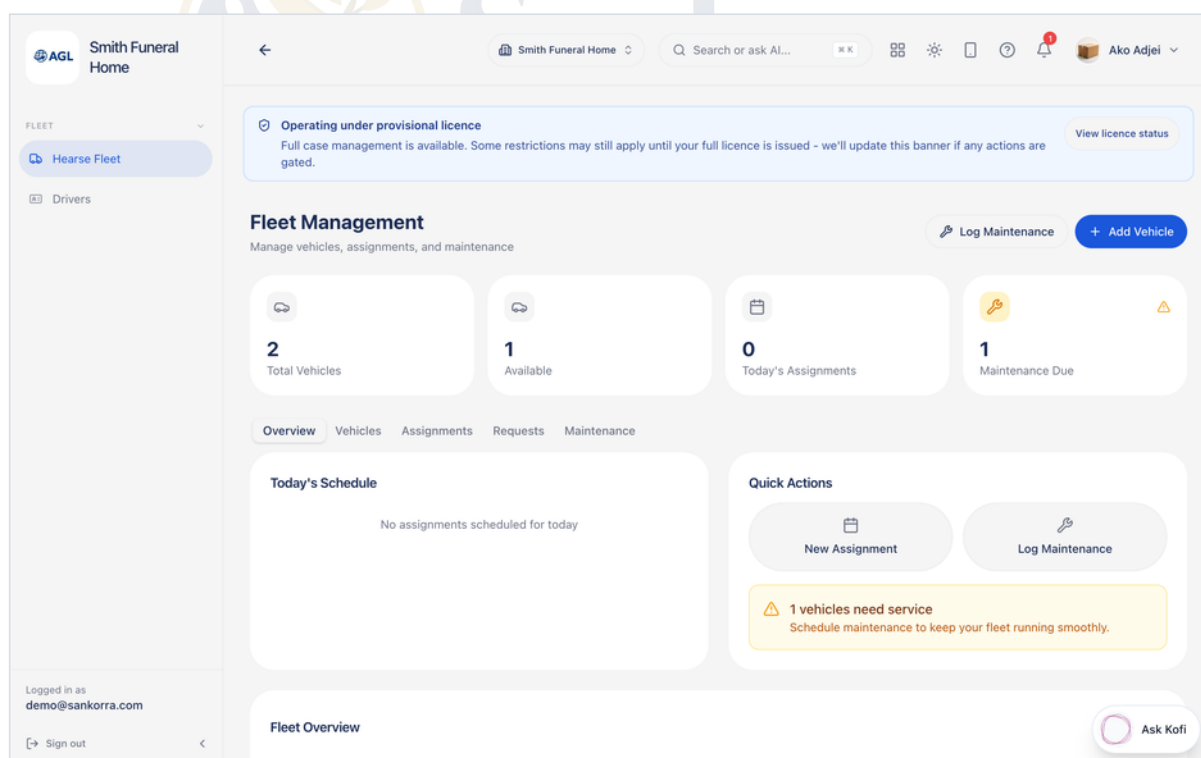
- 1** Press **Log Maintenance**.
- 2** Choose the **Vehicle**.
- 3** Choose the **Type**: Routine Service, Repair, Inspection, Cleaning or Fuel.
- 4** Set the **Service Date** and type the **Description** of what was done.
- 5** Fill in the **Service Provider**, the **Cost** in GH¢ and the **Mileage at Service**.
- 6** Set the **Next Service Due** date.
- 7** Type the **Invoice Reference** and any **Notes**, and save.

To take on a request from another facility:

- 1** Press the **Requests** tab.
- 2** Press the request. It shows which facility sent it, the date and time, the pickup point and the destination, and the family it is on behalf of.
- 3** Accept it. A trip is created on your own fleet, linked back to their case.

Good to know

- **Maintenance Due** counts vehicles whose **Next Service Due** date has passed. That date is set when you log a service, so a vehicle you never log a service for will never warn you.
- **Only an owner, administrator or manager can authorise dispatch.** Anyone else sees "Awaiting an owner or manager to authorise dispatch." Assigning the driver and cancelling the trip are still available to them.
- **A trip cannot be closed until every checklist item is ticked.** Some items tick themselves as you work and are marked "(auto)".
- Billing is raised when the trip is **closed**, not when it is booked. Look for the invoice on the case's billing tab afterwards.
- While a trip is in transit, if the location pin is missing or more than ten minutes old, an amber note asks you to drop a fresh one. The family's tracking map uses that pin, so an old pin means the family is watching a stale position.
- The same vehicle cannot be booked for overlapping hours on the same day. If it is already taken, the booking is refused and nothing is saved; check the Assignments tab and pick another time or vehicle.
- If the **Requests** tab is empty and you expect requests from other facilities, the inbox may be switched off. It is turned on under Facility Settings → Hearse — ask your administrator.
- Insurance and registration expiry dates are stored on the vehicle but there is no warning banner for them on this screen. Check them yourself on the Vehicles tab before a long trip.



The trip panel open at the Lifecycle section, with the closure checklist below it

6.2 Drivers

WHAT THIS SCREEN IS FOR

your pool of drivers, whether each one is free to drive today, and whether their licence is still valid.

HOW TO GET HERE

Sidebar → Drivers.

WHAT YOU SEE ON THE SCREEN

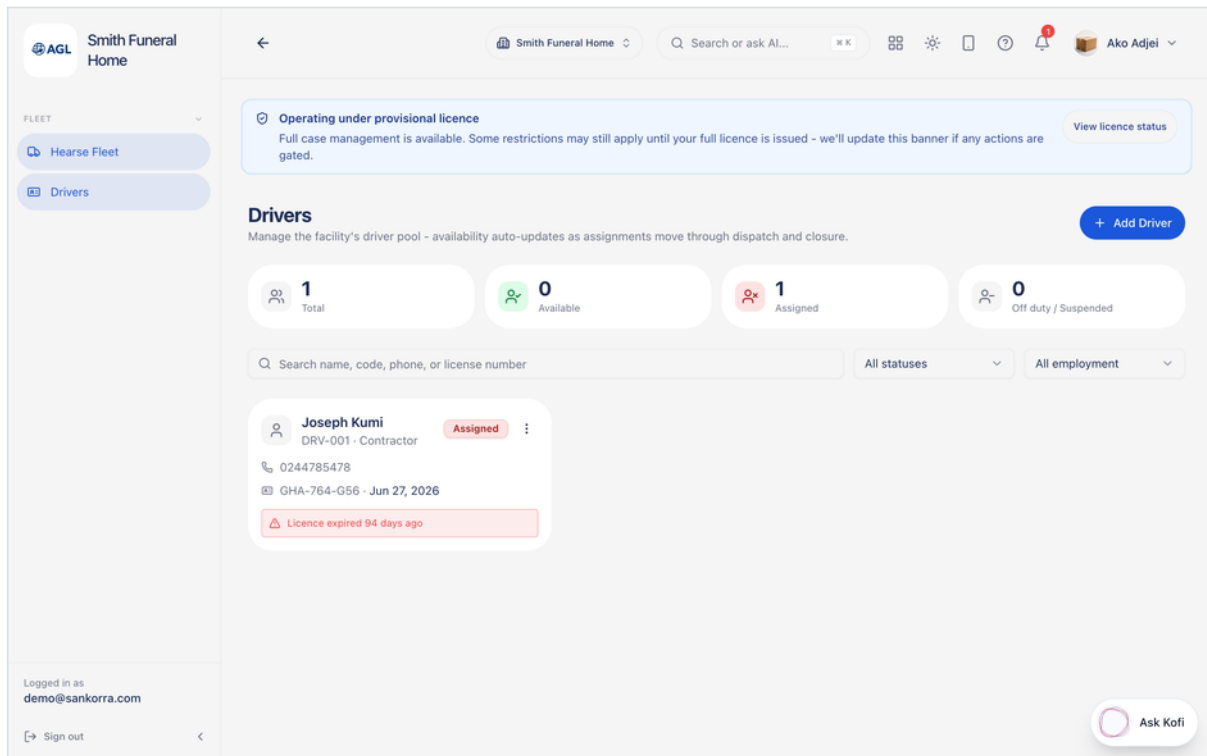
The heading **Drivers** — "Manage the facility's driver pool — availability auto-updates as assignments move through dispatch and closure." — with an **Add Driver** button, if you are allowed to manage drivers.

Four counters: **Total**, **Available**, **Assigned** and **Off duty / Suspended**.

A search box covering name, code, phone number and licence number, and two filters: a status filter (All statuses, Available, Assigned, Off Duty, Suspended) and an employment filter (All employment, Staff, Contractor).

Then a card for each driver showing the full name, the driver code, the word "Contractor" where that applies, a status label, the phone number, and the licence number with its expiry date. If the licence has expired or expires within 60 days, a coloured strip appears at the foot of the card: red for "Licence expired N days ago", amber for "Licence expires in N days".

Driver status	Colour	Meaning
Available	Green	Free to be booked
Assigned	Red	Out on a trip
Off Duty	Grey	Not working today
Suspended	Amber	Blocked from driving



Drivers screen with the four counters and driver cards, one showing a licence-expiry warning

WHAT YOU CAN DO HERE

To add a driver:

- 1 Press **Add Driver**.
- 2 Type the **Driver Code**, for example "DRV-001".
- 3 Choose the **Employment Type**: Staff or Contractor.
- 4 Type the **Full Name**, for example "John Mensah".
- 5 Type the **Phone** number, for example "024 123 4567".
- 6 Type the **License Number**, for example "GHA-DL-12345", and the **License Expiry** date.
- 7 If the driver also has a login for this system, link them under **Link to facility staff**.
- 8 Add any **Notes** and save.

To take a driver off duty or put them back on:

- 1 Press the menu at the top right of the driver's card.
- 2 Choose **Mark Off Duty** or **Mark Available**.

To suspend a driver:

- 1 Press the menu on the card and choose **Suspend**.
- 2 To undo it, press the menu again and choose **Lift Suspension**. The driver goes back to **Available**.

To remove a driver:

- 1 Press the menu and choose **Remove**.

- 2 Confirm. They are hidden from the pool and cannot be booked for new trips. You can add them again later.

Good to know

- **Assigned** is set by the system, not by you. A driver becomes Assigned when a trip is dispatched and goes back to Available when it is closed. There is no menu option to set it by hand.
- Only drivers whose status is **Available** appear in the driver list when you book a trip. A driver who is missing there is Assigned, Off Duty or Suspended.
- Only owners, administrators and managers can add, edit, suspend or remove drivers. Everyone else can see the list but not the menus.
- The licence warning starts 60 days before expiry. The system does **not** stop you booking a driver whose licence has expired — the red strip on the card is your only warning, so check the cards before you dispatch.
- Driver code, full name, phone number, licence number and licence expiry are all required. A phone number shorter than seven characters is refused.

6.3 Maintenance

WHAT THIS SCREEN IS FOR

the upkeep of your building and equipment: what equipment you have, when each piece is next due for service, faults staff have reported, and the temperature log for refrigeration equipment.

HOW TO GET HERE

Sidebar → Maintenance.

WHAT YOU SEE ON THE SCREEN

The heading **Facility Maintenance** — "Manage equipment, maintenance schedules, fault reports, and temperature monitoring".

Five tabs: **Overview**, **Equipment**, **Schedules**, **Faults** and **Temp Log**.

Overview shows four figures:

Figure	What it tells you
Active Equipment	Equipment in service, with any under maintenance noted beneath
Upcoming Maintenance	Services due in the next 14 days, with any overdue in red
Open Faults	Faults still open, with critical and high-priority ones noted
Temperature Alerts	Out-of-range readings in the last 7 days

Below those, **Upcoming Maintenance** lists the next five services, each with the equipment name, the kind of service and the due date, marked **Overdue** in red where the date has passed. Beside it, **Open Fault Reports** lists up to five faults with the nature of the fault, the fault number, the location and a priority label. When there are none, a green tick and "No open fault reports".

Equipment has a search box and filters for status and type, then a card per piece of equipment showing its type, location, make and a status label.

Equipment status	Colour
Active	Green
Inactive	Grey
Under Maintenance	Amber
Retired	Red

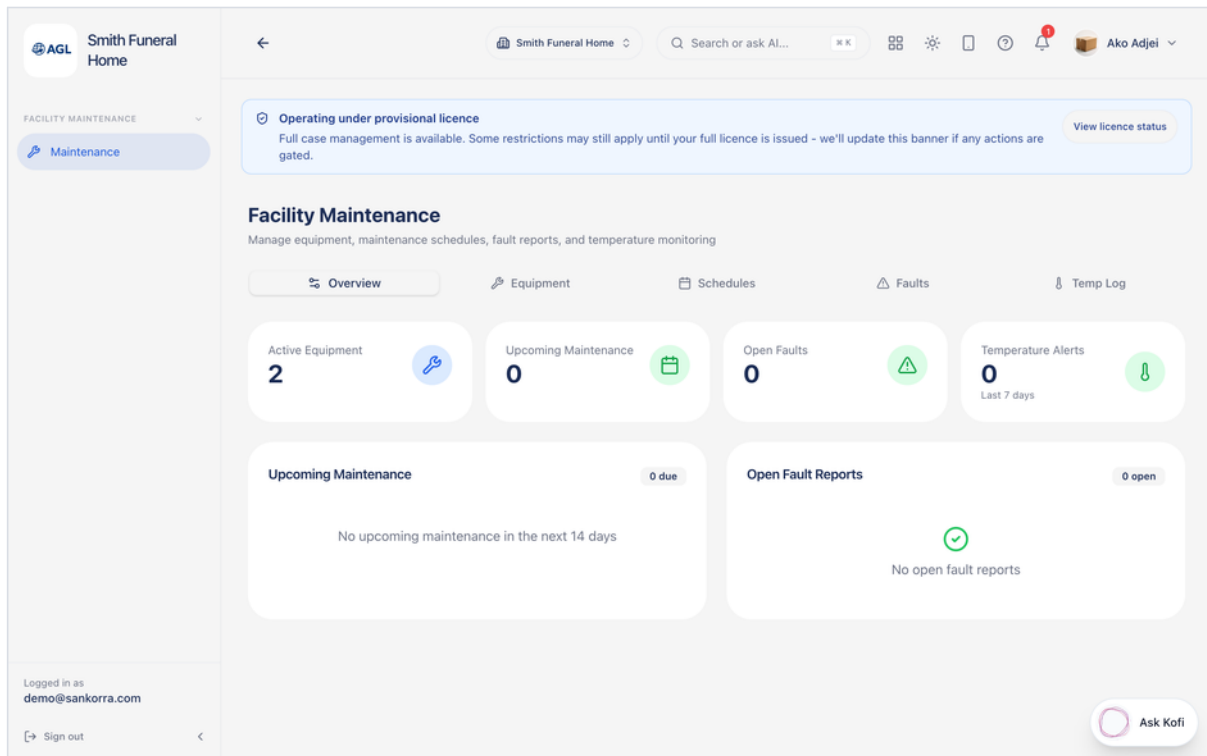
Schedules lists each service schedule as a wide line with a coloured square at the left — red with a warning triangle when overdue, amber when due within seven days, green otherwise. Each line shows the equipment name, a priority label, an **Overdue** label where it applies, the kind of service and how often it is due, the date it was last serviced and the date it is next due. A **Record** button and a menu sit at the right.

Faults has filters for status and priority, a count of open faults and a **Report Fault** button, then a line per fault. Pressing one opens a panel with the full details, a place to change the status, and an activity log.

Fault status	Colour
Open	Red
In Progress	Amber
Resolved	Green
Closed	Grey
Escalated	Purple

Priorities are Low (grey), Medium (blue), High (amber) and Critical (red).

Temp Log covers refrigeration **equipment** — not your storage units. It has an equipment chooser, a period chooser (last 7, 14 or 30 days), an add-reading button, three figures (**Total Records, Compliant Days, Temperature Alerts**) and a table of readings.



Facility Maintenance on the Overview tab with the four figures, upcoming maintenance and open faults

WHAT YOU CAN DO HERE

To add a piece of equipment:

- 1 Press the **Equipment** tab and press the add button.
- 2 Fill in the form. The fields you see are the ones your facility has chosen to show, so yours may differ slightly from another facility's.
- 3 Typical fields are the name, the **Equipment Type** (Refrigerator, Freezer, Cold Room, Compressor, Hearse, Embalming Table, Cremator, Generator, Other), the **Category** (Cold Storage, Refrigeration, Vehicles, Preparation, Power, Other), the location, the serial number, the manufacturer, the model, the purchase date, the warranty expiry and notes.
- 4 Save.

To set up a repeating service:

- 1 Press the **Schedules** tab and press **Add Schedule**.
- 2 Choose the **Equipment**.
- 3 Choose the **Maintenance Type**: Calibration, Service, Inspection, Cleaning, Repair, Parts Replacement or Other.
- 4 Choose the **Priority**: Low, Medium, High or Critical.
- 5 Choose the **Frequency**: Daily, Weekly, Monthly, Quarterly, Semi-Annually, Annually or Custom. For **Custom**, type the number of **Days Between**.
- 6 Set the **Next Due Date**.
- 7 Add a **Description** and **Notes** and save.

To log a service that has been done:

- 1 On the **Schedules** tab, press **Record** on the schedule's line.
- 2 Type the **Work Description** — what was done.
- 3 Type the **Findings** — anything you noticed.
- 4 Fill in the **Cost** in GH¢ and the **Parts Used**.
- 5 Add any **Recommendations**.
- 6 Type your **Signature/Initials**. This is required.
- 7 Press **Record Maintenance**. The next due date is worked out for you from the schedule's frequency.

To report a fault:

- 1 Press the **Faults** tab and press **Report Fault**.
- 2 Fill in the form. As with equipment, the fields shown are the ones your facility has chosen, and normally include the nature of the fault, the location, the priority, who it was reported to, and the equipment it concerns.
- 3 Save. The fault gets its own number and appears as **Open**.

To work a fault through:

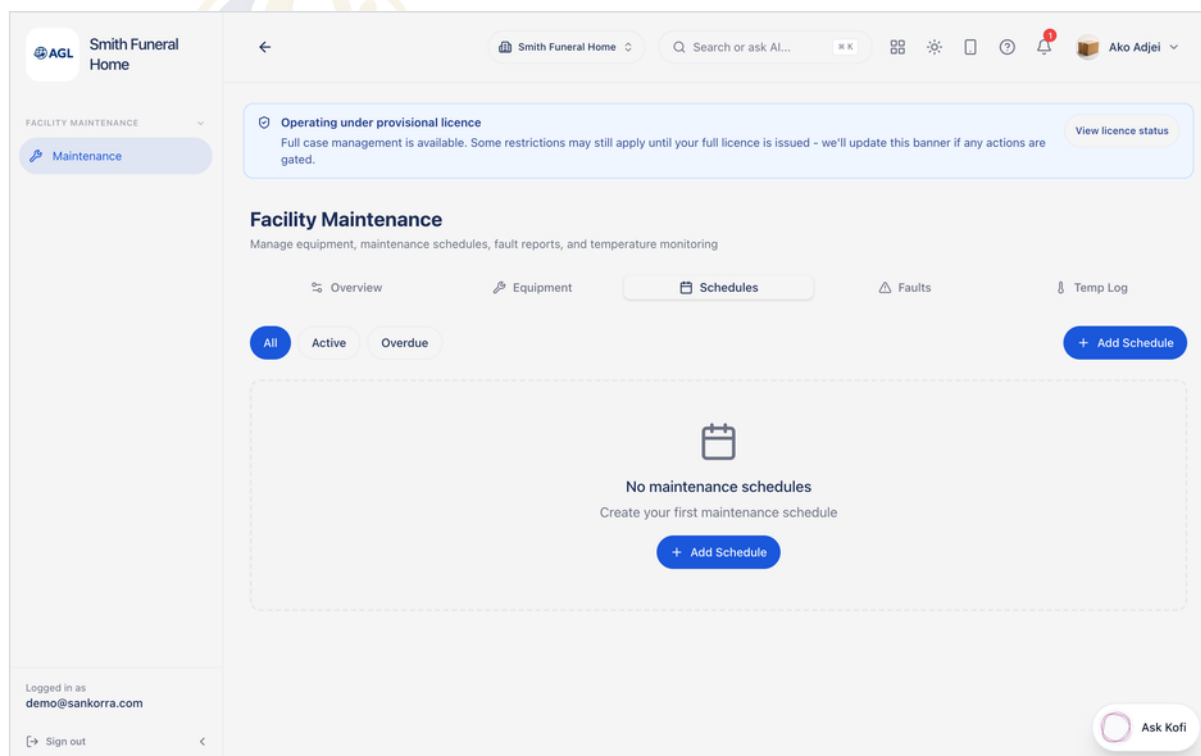
- 1 Press the fault's line to open the details panel.
- 2 Read the nature of the fault, the location, the date reported, who reported it, who it was reported to, the actions taken and the outcome.
- 3 Under **Update Status**, choose the new status and apply it. The change is written into the activity log with the old and the new status.
- 4 Type a comment in the **Activity Log** box and add it, so the next person can see what has happened.

To log a temperature reading against equipment:

- 1 Press the **Temp Log** tab.
- 2 Press the add-reading button.
- 3 Choose the equipment, the date and whether it is the morning or the evening reading.
- 4 Type the temperature in degrees Celsius and your initials, and save.

Good to know

- **This screen is about equipment and the building. It is not the same as the temperature log on the Storage Units screen.** The **Temp Log** tab here only covers equipment filed under the **Refrigeration** category. Readings for your cold-storage units go on Sidebar → Storage Units → Temperature. If your refrigerators are set up in both places, log the reading in the place your regulator's paperwork comes from — the compliance report is produced from the Storage Units screen.
- The equipment and fault forms are built from a list your facility controls. An administrator can add, hide or reorder the fields under Configuration → Maintenance Forms. If a field you expect is missing, that is where it lives.
- **Upcoming Maintenance** on the Overview tab only looks 14 days ahead. Use the **Schedules** tab to see everything.
- A schedule's next due date is recalculated from its frequency each time you record a service, counting from the day you record it — not from the day it was originally due.
- **Signature/Initials** is required when recording a service. It is what makes the log stand up as evidence.
- Changing a fault's status cannot be undone, but nothing is lost: every change is kept in the activity log with who made it.
- If the whole **FACILITY MAINTENANCE** heading is missing from your sidebar, the feature has not been installed for your facility. Ask your administrator.



The Schedules tab with one overdue schedule in red and the Record button on each line

CHAPTER 7

Money

This chapter covers everything on the **Finance** part of the sidebar: what you charge, how you quote a family, how you raise an invoice, how you take payment, and how you keep track of what is still owed. It also covers pre-arrangement plans, where a family pays towards a funeral over months or years.

Everything in this chapter is in Ghana cedis (GH¢). Where the screen says *Mobile Money*, it means MTN MoMo, Telecel Cash and AirtelTigo Money.

7.1 Billing Overview

WHAT THIS SCREEN IS FOR

the one page that tells you how much money has come in, how much is still owed, and which invoices need chasing. Start your day here.

HOW TO GET HERE

Sidebar → Finance → Billing Overview.

WHAT YOU SEE ON THE SCREEN

At the top is the title **Billing Overview** with two buttons: **View All Case Invoices** and **Create Invoice**.

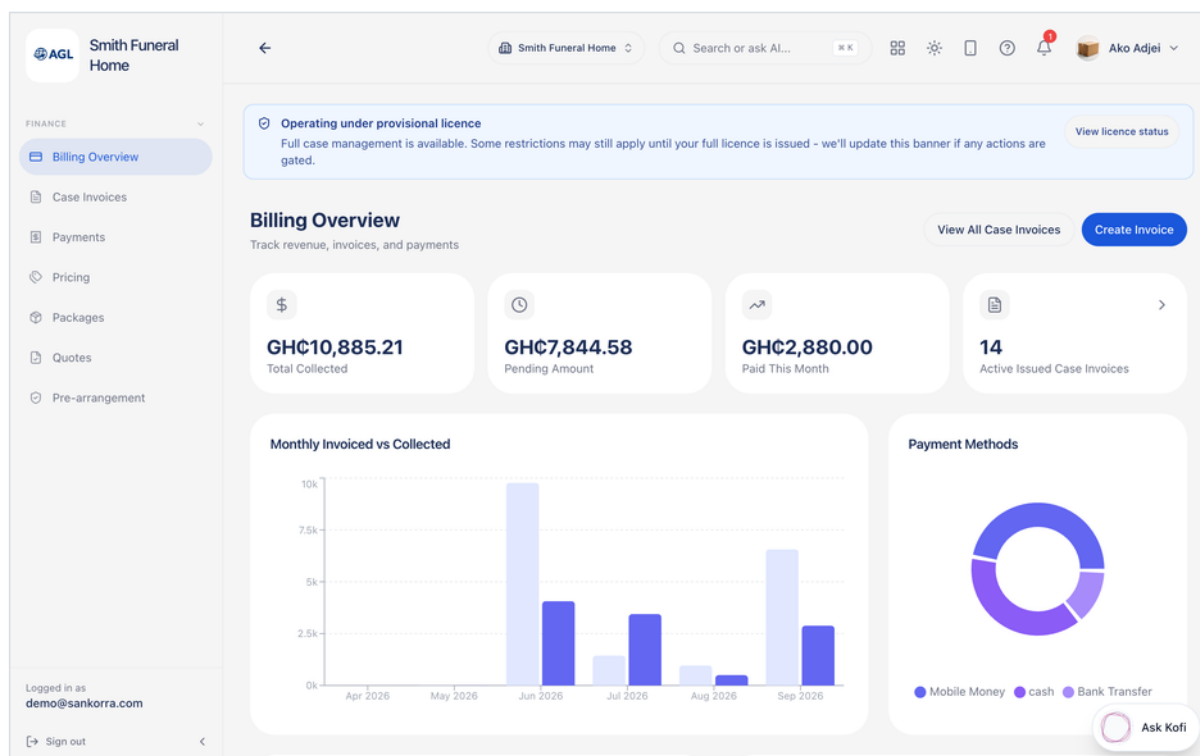
Under that are four tiles:

- **Total Collected** — all money actually received against case invoices.
- **Pending Amount** — the balance still owed on invoices that have been issued.
- **Paid This Month** — money received since the first of this month.
- **Active Issued Case Invoices** — how many issued invoices you have. Press this tile to open the full list.

Below the tiles are two charts. **Monthly Invoiced vs Collected** shows the last six calendar months with two bars per month: the pale bar is what you invoiced, the solid bar is what you collected. **Payment Methods** is a ring chart splitting your collections by how the family paid. If no money has come in yet it reads "No collected payments yet".

If any family has submitted burial details and is waiting for their deposit back, a **Pending Burial Info Refunds** panel appears next. Each line shows the case number, the name of the deceased, the burial place and date, when the details were submitted, the deposit amount, and a **Mark Refunded** button.

At the bottom, **Recent Case Invoices** lists the five newest invoices with their number, status, date and amount, plus a **View All** link. Beside it, **Quick Actions** tells you how many issued invoices are past their due date (with a **Review Now** link when there are some), and offers shortcut buttons for **New Invoice** and **View Payments**.



Billing Overview with the four money tiles, the Monthly Invoiced vs Collected bar chart and the Payment Methods ring chart

WHAT YOU CAN DO HERE

To chase invoices that are past their due date:

- 1 Look at the **Overdue Case Invoices** note in Quick Actions.
- 2 Press **Review Now**.
- 3 The Case Invoices list opens already filtered to overdue invoices.
- 4 Open each one and press **Send Reminder**.

To close off a burial information deposit you have paid back:

- 1 Find the family in the **Pending Burial Info Refunds** panel.
- 2 Pay the deposit back to them in the normal way (cash, bank or Mobile Money).
- 3 Press **Mark Refunded** on that line.
- 4 The line disappears from the panel.

Good to know

- The money figures on this page count case invoices only. Over-the-counter shop sales are counted separately.
- **Active Issued Case Invoices** does not count drafts. An invoice is only counted once it has actually been sent to the family.
- **Mark Refunded** only closes the matter inside Sankorra. It does not move any money. Pay the family first, then press the button.
- This whole Finance section of the sidebar only appears if billing is switched on for your facility. If you cannot see it, ask your administrator.

7.2 Case Invoices

WHAT THIS SCREEN IS FOR

the full list of every invoice raised against a case, so you can see at a glance what is paid, what is waiting and what is late.

HOW TO GET HERE

Sidebar → Finance → Case Invoices.

WHAT YOU SEE ON THE SCREEN

The title **Case Invoices** with a **New Invoice** button, then the same four money tiles as the Billing Overview.

Under the tiles is a filter strip:

- **Search** — type part of an invoice number.
- **Status** — Overdue, Draft, Pending, Paid, Partial, Cancelled, Refunded.
- **Issue date** — a from-and-to date pair. When you pick the Draft status this changes to **Created date**, because a draft has no issue date yet.

Then the list itself, with these columns: **Invoice #** (a warning triangle appears beside the number when it is overdue), **Case** with a *View Case* link, **Status**, **Issue Date** (drafts read "Not issued"), **Due Date** (shown in red when late) and **Total**. Press any line to open that invoice. Twenty invoices are shown at a time, with page buttons underneath.

Case Invoices

Manage case invoices and track payments

Summary Tiles:

- Total Collected: **GHC10,885.21**
- Pending Amount: **GHC7,844.58**
- Paid This Month: **GHC2,880.00**
- Active Issued Case Invoices: **14**

Filter Strip:

Search by invoice number... Status Issue date

INVOICE #	CASE	STATUS	ISSUE DATE	DUE DATE	TOTAL
INV-20260929-0001	View Case	draft	Not issued	-	GHC960.00
INV-20260926-0001	View Case	paid	Sep 26, 2026	-	GHC1,440.00
INV-20260911-0001	View Case	paid	Sep 11, 2026	-	GHC1,440.00
INV-SEED-2026-1007	View Case	partial	Jun 30, 2026	Jul 14, 2026	GHC3,680.00
Si-2608-0004	View Case	draft	Not issued	-	GHC240.00
INV-20260827-0003	View Case	partial	Aug 27, 2026	-	

Case Invoices list with the status filter open and several invoices showing Draft, Pending, Partial and Paid badges

WHAT YOU CAN DO HERE

To find every invoice that is late:

- 1 Open the **Status** list.
- 2 Choose **Overdue**.
- 3 Work down the list, opening each invoice to send a reminder.

To find all the invoices you started but never sent:

- 1 Open the **Status** list.
- 2 Choose **Draft**.
- 3 Set the **Created date** range if you only want recent ones.

Good to know

Here is what each status means:

Status	What it means
Draft	Started but not sent. The family cannot see it.
Pending	Sent to the family and waiting for payment.
Partial	Some money received; a balance is still owed.
Paid	Settled in full.
Cancelled	Voided, with a reason recorded.
Refunded	Marked as refunded.

- **Overdue** is not a status of its own. It means an invoice is Pending or Partial, its due date has passed, and money is still owed. That is why Overdue sits in the same list as the real statuses.
- An invoice with no due date can never show as overdue.
- Shop sales are not in this list — only invoices tied to a case.

7.3 Creating a case invoice

WHAT THIS SCREEN IS FOR

picking the case you want to bill, then building the invoice line by line.

HOW TO GET HERE

Sidebar → Finance → Case Invoices → **New Invoice**. The **Create Invoice** button on Billing Overview brings you to the same place.

WHAT YOU SEE ON THE SCREEN

The title **Create Case Invoice** and a **Back to Invoices** button, then a search box ("Search by case number or deceased name..."), then a list of cases showing **Case #**, **Deceased**, **Status**, **Created** and a **Select** button on each line.

Pressing **Select** (or the line itself) opens the **Create Invoice** window. Inside it:

- A blue note reminding you that services added on a case's Services tab already build a draft invoice by themselves, so this manual route is for odd charges, deposits, and cases where the services carry no price.
- **Line Items** — one row per charge, each with a description box, a quantity box, a price box and the line total. As you type in the description box, Sankorra suggests items you have charged before and fills in the price when you pick one. Use **Add Item** for another row and the bin to remove one.
- **Import from Services** — brings the case's services in as lines in one go.
- **Tax** — only appears when automatic tax is switched off for your facility.
- **Discount** — a cedi amount off the whole invoice.
- A totals panel showing Subtotal, then either the three tax lines (VAT, NHIL, GETFund Levy) or a single Tax line, then Discount, then **Total**.
- **Due Date** and **Notes**.
- **Cancel** and **Create Invoice**.

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Create Case Invoice

Select a case, then create a draft invoice for it. [← Back to Invoices](#)

Q Search by case number or deceased name...

CASE #	DECEASED	STATUS	CREATED	
SFH-26-1028	Emma Amo Preparation	Preparation	Sep 28, 2026	+ Select
SFH-26-1027	Peace Amo Preparation	Preparation	Sep 26, 2026	+ Select
SFH-26-1025	Kofi Mensah Preparation	Preparation	Sep 15, 2026	+ Select
SFH-26-1024	Kofi Mensah Body Receiving	Body Receiving	Sep 15, 2026	+ Select
SFH-26-1023	Kofi Dela Body Receiving	Body Receiving	Sep 11, 2026	+ Select
SFH-26-1021	Bill Eli intake	intake	Sep 11, 2026	+ Select
SFH-26-1020	Eli Bill Dressing & Casketing	Dressing & Casketing	Aug 27, 2026	+ Select
SFH-26-1019	Bless Amo			+ Select

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[Sign out](#)

[Ask Kofi](#)

The case picker list with the search box filled in

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Create Case Invoice

Select a case, then create a draft invoice for it. [← Back to Invoices](#)

Search by case number or deceased name...

CASE #	DECEASED	STATUS	CREATED	
SFH-26-1028	Emma Amo Preparation	Preparation	Sep 28, 2026	+ Select
SFH-26-1027	Peace Amo Preparation	Preparation	Sep 26, 2026	+ Select
SFH-26-1025	Kofi Mensah Preparation	Preparation	Sep 15, 2026	+ Select
SFH-26-1024	Kofi Mensah Body Receiving	Body Receiving	Sep 15, 2026	+ Select
SFH-26-1023	Kofi Dela Body Receiving	Body Receiving	Sep 11, 2026	+ Select
SFH-26-1021	Bill Eli intake	intake	Sep 11, 2026	+ Select
SFH-26-1020	Eli Bill Dressing & Casketing	Dressing & Casketing	Aug 27, 2026	+ Select
SFH-26-1019	Bless Amo Preparation	Preparation	Sep 28, 2026	+ Select

Logged in as demo@sankorra.com
[→ Sign out](#)

[Ask Kofi](#)

The Create Invoice window with two line items, the VAT, NHIL and GETFund lines and the Total

WHAT YOU CAN DO HERE

To raise an invoice from the services already on a case:

- 1 Search for the case and press **Select**.
- 2 Press **Import from Services**.
- 3 Check each imported line; correct any quantity or price.
- 4 Fill in **Due Date**.
- 5 Press **Create Invoice**.

To raise an invoice for a deposit or a one-off charge:

- 1 Search for the case and press **Select**.
- 2 Type the charge into the description box of the first line.
- 3 Set the quantity and the price.
- 4 Press **Add Item** if there is more than one charge.
- 5 Fill in **Due Date** and press **Create Invoice**.

Good to know

- A new invoice is always created as a **Draft**. Nothing reaches the family until you open it and press **Send Invoice**.
- **Import from Services** is greyed out when the case has no services on it. It only brings across services that are not cancelled and that have a price above zero.
- The tax lines and their percentages come from your facility settings. If you need VAT on invoices and do not see it, ask your administrator to switch on tax in Settings.
- If your facility's licence is not yet issued, or has been suspended, this screen shows **Licence required** or **Licence suspended** instead of the case list. You can still set up your pricing and packages in the meantime.

7.4 One invoice

WHAT THIS SCREEN IS FOR

everything about a single invoice: what is on it, what has been paid, what is left, and every way of getting it settled.

HOW TO GET HERE

Sidebar → Finance → Case Invoices, then press any line.

WHAT YOU SEE ON THE SCREEN

At the very top is a trail — Billing, Case Invoices, then the invoice number — so you can step back.

Then the invoice number as the heading, with its status badge and, when it applies, a red **Overdue** badge. The buttons beside it change with the status:

- On a draft: **Send Invoice**.
- On a Pending or Partial invoice with money still owed: **Send Reminder**, **Copy payment link**, **Pay Online** (only when your facility has online payments set up) and **Record Payment**.
- Always: a **Print / Export** menu with Preview PDF, Download PDF and Print.
- Unless the invoice is already paid or cancelled: a red **Cancel** button.

If the invoice was cancelled, a red panel shows the reason.

Four tiles follow: **Subtotal**, **Total**, **Paid** and **Balance Due**. Balance Due is red while money is owed and green once it is settled.

The main column holds:

- **Line Items** — description, quantity, unit price and total for each charge. Where a rate schedule or a tier has brought a price down, the old price is shown struck through above the new one. Underneath is the totals stack: Subtotal, Discount and Net Subtotal where a schedule discount applied, then VAT, NHIL and GETFund Levy (or a single Tax line), then Manual Discount, then **Total**. On invoices with items that came out of your stock, a small block marked *Internal — not on PDF* shows **Cost of goods sold** and **Gross profit**. That block never appears on the printed invoice.

- **Payment History** — every payment you have recorded, with date, method, reference, status and amount.
- **Online Payment Attempts** — only shown when the family has tried to pay online.
- **Payment Receipts** — one line per receipt, with buttons to preview and download.

The side column holds **Invoice Details** (Issue Date, Due Date, Paid Date, Currency and the Related Case), the **Billing Contact** with their phone and email, and any **Notes**.

The screenshot shows the Sankorra Facility Dashboard for Smith Funeral Home. The left sidebar contains navigation links for Finance, Billing Overview, Case Invoices, Payments, Pricing, Packages, Quotes, and Pre-arrangement. The main content area displays an invoice for INV-20260929-0001, which is currently a Draft. The invoice summary shows a Subtotal of GHC800.00, a Total of GHC960.00, and a Balance Due of GHC960.00. The line items table lists the following items:

DESCRIPTION	QTY	UNIT PRICE	TOTAL
Open Embalming	1	GHC800.00	GHC800.00
Subtotal			GHC800.00
VAT (15%)			GHC120.00
NHIL (2.5%)			GHC20.00
GETFund Levy (2.5%)			GHC20.00
Total			GHC960.00

The invoice details section shows the Issue Date as 'Not set', the Due Date as 'Not set', the Currency as GHS, and the Related Case as SFH-26-1028 (Emma Amo). The Billing Contact is Ask Kofi. The Payment History panel is also visible at the bottom.

One invoice showing the Subtotal, Total, Paid and Balance Due tiles, the line items with the tax lines, and the Payment History panel

WHAT YOU CAN DO HERE

To send the invoice to the family:

- 1 Press **Send Invoice**.
- 2 Read the confirmation and press **Send Invoice** again.
- 3 A message tells you who it went to and by which route — the customer app, email or SMS.

Sankorra tries the billing contact first, and the primary contact if the billing contact cannot be reached. The invoice only moves from Draft to Pending if at least one of those routes worked. If nothing could be reached you get a warning and the invoice stays a draft, so you can add a phone number or email to the contact and try again.

To record a payment taken at the counter:

- 1 Press **Record Payment**.
- 2 Check the **Amount**. It starts at the full balance; change it for a part payment.
- 3 Choose the **Payment Method** — Cash, Bank Transfer, Mobile Money, Card, Cheque or Other.

- 4 Type the **Reference Number** if there is one — the MoMo transaction number, the cheque number, and so on.
- 5 Press **Generate** beside **Receipt Number**, or type your own number.
- 6 Press **Record Payment**.

There are also quick buttons for **Full Balance** and, on larger balances, **50%**.

The screenshot displays the 'Smith Funeral Home' dashboard. On the left is a sidebar with navigation links: Finance, Billing Overview, Case Invoices, Payments, Pricing, Packages, Quotes, and Pre-arrangement. The main content area shows an invoice for 'INV-20260929-0001' with a status of 'Draft'. At the top, there's a banner about operating under a provisional licence. Below the invoice title, there are buttons for 'Send Invoice', 'Print / Export', and 'Cancel'. The summary section shows: Subtotal (GHC800.00), Total (GHC960.00), Paid (GHC0.00), and Balance Due (GHC960.00). The 'Line Items' table lists 'Open Embalming' with a quantity of 1, unit price of GHC800.00, and total of GHC800.00. It also includes VAT (15%), NHIL (2.5%), and GETFund Levy (2.5%). The 'Invoice Details' section shows 'Issue Date' as 'Not set', 'Due Date' as 'Not set', 'Currency' as 'GHS', and 'Related Case' as 'SFH-26-1028' for 'Emma Amo'. The 'Billing Contact' is 'Bill Amo'. At the bottom left, it says 'Logged in as demo@sankorra.com' with a 'Sign out' link. At the bottom right, there's an 'Ask Kofi' button.

The Record Payment window showing the balance due, the amount box, the payment method list and the receipt number Generate button

To let the family pay online at the counter:

- 1 Press **Pay Online**.
- 2 Fill in **Full Name** and **Email Address**.
- 3 Fill in **Phone Number** — this is needed for Mobile Money.
- 4 Choose the payment method.
- 5 Press the **Pay** button. The payment provider's page opens to finish the payment.

To send the family a link so they can pay themselves:

- 1 Press **Copy payment link**.
- 2 Paste the link into WhatsApp, an SMS or an email.
- 3 The family opens the link, chooses their network — MTN Mobile Money, Telecel Cash or AirtelTigo Money — types their number and approves the prompt on their phone.

To chase a family who has not paid:

- 1 Press **Send Reminder**.

- 2 Confirm.
- 3 A message tells you who the reminder reached.

To cancel an invoice:

- 1 Press **Cancel**.
- 2 Type the reason in **Cancellation Reason**. This is required.
- 3 Press **Cancel Invoice**.

Good to know

- Payments can only be recorded against an invoice that has been issued and is still open — that is, Pending or Partial. You cannot record a payment on a draft, and you cannot record one on an invoice that is already paid or cancelled.
- Recording part of the balance moves the invoice to **Partial**. Recording the rest moves it to **Paid**.
- If you type more than the balance you get a warning about overpayment before you save.
- A receipt is created by itself for every payment, whether you recorded it by hand or the family paid online. You do not have to make receipts yourself.
- Cancelling cannot be undone, and the reason you type is shown to the family in the customer app. Write something they can understand.
- **Pay Online** only appears when a payment provider has been set up for your facility. If the window says online payment is not available, ask your administrator.
- **Attach to case** and **Unlink** only appear on shop-sale invoices, whose numbers begin with RTS. Invoices raised against a case cannot be moved to another case.

7.5 Payments

WHAT THIS SCREEN IS FOR

every payment your facility has received against case invoices, in one list, with the receipts beside them.

HOW TO GET HERE

Sidebar → Finance → Payments.

WHAT YOU SEE ON THE SCREEN

The title **Payments** with an **Export** button, then five tiles: **Total Received**, **Online Payments**, **Manual Payments**, **This Month**, and **Pending** (the number of online payments still in flight).

Below that are four tabs:

- **All Transactions** — everything together, with a *Source* column marking each line as manual or online.
- **Online Payments** — payments made through a payment provider, with the provider name, the customer's name, any provider fee under the amount, and a reason under the status when a payment failed.

- **Manual Payments** — payments your staff recorded by hand, with the invoice number, method, reference and status.
- **Receipts** — the receipt list, with a filter for All Types, Manual or Online, and buttons to preview and download each receipt.

On the first three tabs there is a filter strip for **Method**, **Status** and a date range.

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Payments

Track payments received against case invoices [Export](#)

GHC10,885.21
Total Received

GHC1.00
Online Payments

GHC10,884.21
Manual Payments

GHC2,880.00
This Month

0
Pending transactions

[All Transactions](#) [Online Payments](#) [Manual Payments](#) [Receipts](#)

Method Status Transaction date

DATE	REFERENCE	SOURCE	TYPE	METHOD	STATUS	AMOUNT
Sep 26, 2026	SH1 INV-20260926-0001	Manual	Case Invoice INV-20260926-0001	Cash	Completed	GHC1,440.00
Sep 11, 2026	ff5679e9-abc4-4cff-a33a-4b2270b50474 INV-20260911-0001	Manual	Case Invoice INV-20260911-0001	Bank Transfer	Completed	GHC0.24
Sep 11, 2026	bfecc399-5b7a-4a6b-b75a-728b1c088a3c INV-20260911-0001	Manual	Case Invoice INV-20260911-0001	Bank Transfer	Completed	GHC1,438.76
Sep 11, 2026	TXN-260911-134358-98355B NeraSika	Online	Case Invoice INV-20260911-0001	Mobile Money	Successful	

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Ask Kofi

The Payments screen on the All Transactions tab, showing the five tiles and a mixed list of manual and online payments

WHAT YOU CAN DO HERE

To reconcile a day's takings:

- 1 Open the **Manual Payments** tab.
- 2 Set the date range to that day.
- 3 Compare the list with your cash book.
- 4 Press **Export** to download the same list as a spreadsheet file.

To check whether a family's online payment actually went through:

- 1 Open the **Online Payments** tab.
- 2 Set **Status** to **Successful**, or to **Failed** if you are looking for the problem.
- 3 Find the payment by date or by the customer's name.
- 4 A failed payment shows the reason under its status.

Good to know

- **Export** downloads whatever tab and filters you are looking at. If nothing matches you are told so instead of getting an empty file.
- Online payments can read Successful, Pending, Processing, Failed, Refunded or Cancelled. Payments recorded by hand can read Completed, Pending, Failed or Refunded.
- A payment the family made online shows once, not twice, even though Sankorra records it in two places behind the scenes.
- There is no button in Sankorra that sends money back to a family. Refunds are made through your bank or your Mobile Money provider. Once your provider reports a refund it shows here with a Refunded status. The one exception is the burial information deposit, which you close off on the Billing Overview.

7.6 Pricing

WHAT THIS SCREEN IS FOR

your price list. Each service has one base price and, if you want, several named tiers for different levels of the same service.

HOW TO GET HERE

Sidebar → Finance → Pricing.

WHAT YOU SEE ON THE SCREEN

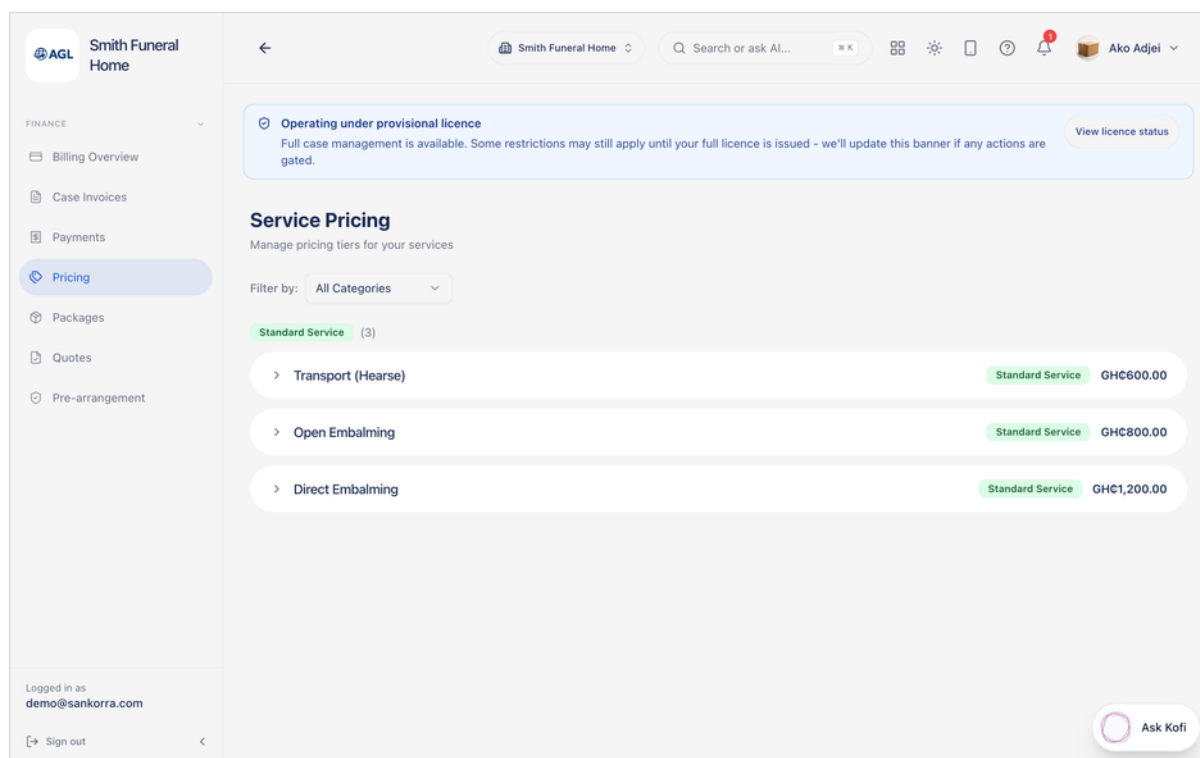
The title **Service Pricing** with the line "Manage pricing tiers for your services", then a **Filter by** list of your service categories.

Below that, your services grouped under a category heading with a count beside it. Each service shows its name, its description, its category badge and its base price.

Press a service to open it. Inside you see:

- **Base Price**, marked **Default**, with the amount.
- One line for each tier: the tier name, a **Default** star if it is the preferred tier, an **Inactive** badge if it is switched off, the description, the price, a pencil to change it and a bin to delete it.
- An **Add Tier** button.

The tier window asks for **Tier Name**, **Price**, **Description**, a **Set as Default** switch, and — when you are changing an existing tier — an **Active** switch.



Service Pricing with one service opened to show its base price and two tiers

WHAT YOU CAN DO HERE

To add a level of pricing to a service:

- 1 Press the service to open it.
- 2 Press **Add Tier**.
- 3 Type a **Tier Name** such as Standard or Premium.
- 4 Type the **Price**.
- 5 Add a short **Description** if it helps your staff choose.
- 6 Switch on **Set as Default** if this is the tier you normally charge.
- 7 Press **Add Tier**.

To stop using a tier without losing its history:

- 1 Press the service to open it.
- 2 Press the pencil on that tier.
- 3 Switch **Active** off.
- 4 Press **Save Changes**.

Good to know

- Services themselves are not created here. If the page says "No services found", your service types have not been set up yet — ask your administrator to add them in Settings.
- Deleting a tier cannot be undone. Switching it to Inactive is the safer choice.
- Only one tier per service can be the default.

7.7 Packages

WHAT THIS SCREEN IS FOR

bundles of services you sell as one thing, either at a flat price or as the sum of the parts with a discount.

HOW TO GET HERE

Sidebar → Finance → Packages.

WHAT YOU SEE ON THE SCREEN

The title **Service Packages** with the line "Bundle services into packages with discounts" and a **Create Package** button. Under that a **Category** filter and a **Show inactive** switch.

Then a grid of package cards. Each card shows the package name (with a gold star when it is featured), a category badge, a badge reading **Fixed Price** or **Discounted**, an **Active** or **Inactive** badge, an eye symbol showing whether the package is public, a pencil, a bin, the description, the price line and the number of items. Press a card to open the package.

The **Create Package** window asks for:

- **Name and Description.**
- **Category.**
- **Pricing Mode** — either **Fixed Price** or **Sum with Discount**.
- **Fixed Price (GHS)** when you chose Fixed Price.
- **Discount Type** (Percentage or Fixed Amount) and the discount value when you chose Sum with Discount.
- A **Featured** switch and a **Public** switch.

The Service Packages grid with several package cards showing their price, badges and item counts

WHAT YOU CAN DO HERE

To create a package at a flat price:

- 1 Press **Create Package**.
- 2 Type the **Name** and a **Description** families will understand.
- 3 Choose the **Category**.
- 4 Leave **Pricing Mode** on **Fixed Price**.
- 5 Type the **Fixed Price (GHS)**.
- 6 Switch **Public** on if you want families to see it on your storefront.
- 7 Press **Create Package**.
- 8 Press the new card and add the services that make it up (see 7.8).

To create a package priced as its parts less a discount:

- 1 Press **Create Package**.
- 2 Fill in the name, description and category.
- 3 Press **Sum with Discount**.
- 4 Choose **Percentage** or **Fixed Amount** and type the value.
- 5 Press **Create Package**.

Good to know

- A package only shows on your storefront when it is both **Public** and **Active**.
- **Featured** pushes a package to the front of your storefront listing.
- Deleting a package removes every item inside it and cannot be undone. Switching it to Inactive keeps it for your records.
- Inactive packages are hidden until you turn on **Show inactive**.

7.8 One package

WHAT THIS SCREEN IS FOR

choosing which services go into a package, in what quantity, at what price, and seeing what the package comes to.

HOW TO GET HERE

Sidebar → Finance → Packages, then press a package card.

WHAT YOU SEE ON THE SCREEN

A **Back to Packages** button, then a header panel with the package name, its category, its pricing mode, its Active or Inactive badge, an **Active** switch and an **Edit** button.

The main column holds **Package Items** with an **Add Service** button and a table:

- **Service** — the service name and its category.
- **Tier** — a list letting you pick Base price or any active tier for that service.
- **Qty** — how many.

- **Optional** — a switch marking the item as an extra the family can drop.
- **Override Price** — a price that replaces both the tier price and the base price.
- **Line Total**, and a bin to remove the item.

The **Add Service** window has a search box and a list of your active services with their category and base price, each with an **Add** button. Services already in the package read **Added** and cannot be added twice.

The side column holds **Price Breakdown**: one line per included item, then Subtotal, then the package discount (on a Sum with Discount package), then the **Fixed package price** line (on a fixed-price package), then **Total**.

The screenshot shows the 'Standard Funeral Service' package in the Smith Funeral Home dashboard. The package is active and has a fixed price. The 'Package Items' table lists two services: 'Open Embalming standard-service' and 'Transport (Hearse) standard-service'. Both are set to a quantity of 1, are optional, and have no override price. The 'Price Breakdown' panel shows the following costs:

Item	Price
Open Embalming	GHS 800.00
Transport (Hearse)	GHS 600.00
Subtotal	GHS 1400.00
Fixed package price	GHS 8500.00
Total	GHS 8500.00

One package with its items table, a tier chosen on one line, and the Price Breakdown panel beside it

WHAT YOU CAN DO HERE

To build up a package:

- 1 Press **Add Service**.
- 2 Search for the service and press **Add**.
- 3 Repeat for every service in the package.
- 4 Close the window.
- 5 On each line, choose a **Tier** if you want a level other than the base price.
- 6 Set the **Qty**.
- 7 Switch on **Optional** for anything the family may leave out.
- 8 Watch the **Price Breakdown** as you go.

To charge a special price for one service inside this package only:

- 1 Find the service's line.
- 2 Type the price into **Override Price**.
- 3 The **Line Total** and the breakdown update straight away.

To take a package out of use:

- 1 Switch **Active** off in the header panel.

Good to know

- Changes to items save as soon as you make them. There is no Save button on the table.
- Price order of precedence: **Override Price** wins; if there is none, the **Tier** price is used; if there is no tier, the service's base price is used.
- The **Edit** button takes you back to the Packages list. To change the package's name, category, pricing mode or discount, press the pencil on its card there.
- Optional items are counted in the breakdown on this page. When a quote is turned into a case, only the items that are **not** optional are carried into the case.

7.9 Quotes

WHAT THIS SCREEN IS FOR

the list of prices you have put in front of families, and how many of them turned into work.

HOW TO GET HERE

Sidebar → Finance → Quotes.

WHAT YOU SEE ON THE SCREEN

The title **Quotes** with the line "Create and manage price quotes for clients" and a **New Quote** button.

Four tiles: **Total Quotes**, **Pending**, **Accepted** and **Conversion Rate**.

A filter row with **Status**, **From** and **To** dates.

Then the list: **Quote #**, **Client Name**, **Items**, **Total**, **Status**, **Created**, **Valid Until** and an eye button. Press any line to open the quote. Twenty quotes per page.

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Quotes

Create and manage price quotes for clients [+ New Quote](#)

2 Total Quotes 1 Pending 1 Accepted 50.0% Conversion Rate

Status: All Statuses From: dd.mm.yyyy To: dd.mm.yyyy

Quote #	Client Name	Items	Total	Status	Created	Valid Until
QT-00002	Chapel	-	GHS 20600.00	Sent	Sep 12, 2026	-
SFQ-26-0001	Ama Boateng	-	GHS 6000.00	Accepted	Jun 20, 2026	Jul 11, 2026

Logged in as **demo@sankorra.com** [Sign out](#)

[Ask Kofi](#)

The Quotes list with the four tiles above it and quotes in Draft, Sent, Accepted and Converted status

WHAT YOU CAN DO HERE

To see what is still waiting on a family:

- 1 Open the **Status** list.
- 2 Choose **Sent** or **Viewed**.
- 3 Open each quote and press **Resend** where the family has gone quiet.

Good to know

Here is what each status means:

Status	What it means
Draft	Built but not sent.
Sent	Delivered to the family by email or SMS.
Viewed	You have marked it as seen by the family.
Accepted	The family agreed to it.
Declined	The family said no.
Expired	You have marked it as no longer valid.
Converted	A case has been created from it.

- **Total Quotes** counts every quote you have. **Pending**, **Accepted** and **Conversion Rate** are worked out from the quotes on the page in front of you, so they change as you page through or filter.

- A quote does not change status by itself. Passing the **Valid Until** date does not make it Expired, and the family cannot accept it in the system — you move it along as you hear from them.

7.10 Building a quote

WHAT THIS SCREEN IS FOR

putting a price in front of a family, item by item, before there is a case.

HOW TO GET HERE

Sidebar → Finance → Quotes → **New Quote**.

WHAT YOU SEE ON THE SCREEN

A **Back** button and the title **New Quote**.

Client Information comes first: **Client Name** (required), **Email**, **Phone** and **Client Type**.

Below that, **Add Items** with three tabs:

- **Services** — your active services with their category and base price, each with a plus button.
- **Packages** — your active packages with their category and price, each with a plus button.
- **Custom** — **Description**, **Quantity** and **Unit Price (GHS)** boxes and an **Add Custom Item** button, for anything not in your price list.

To the right sits **Quote Summary**, which follows you down the page. It lists every item you have added, with the quantity and price still editable on each line and a bin to remove it. Under the lines: **Subtotal**, a **Tax (GHS)** box, a **Discount (GHS)** box and the **Total**. Then **Valid Until**, **Notes** and **Terms & Conditions**. At the bottom are **Save as Draft** and **Save & Send**.

The quote builder with the Services tab open on the left and three items in the Quote Summary on the right

WHAT YOU CAN DO HERE

To quote a family:

- 1** Type the **Client Name**.
- 2** Add the **Email** or **Phone**, or both.
- 3** On the **Services** tab, press the plus beside each service you are offering.
- 4** On the **Packages** tab, add any package.
- 5** On the **Custom** tab, add anything that is not in your price list.
- 6** In **Quote Summary**, adjust any quantity or price.
- 7** Type the **Tax (GHS)** and **Discount (GHS)** if they apply.
- 8** Set **Valid Until**.
- 9** Type your **Terms & Conditions**.
- 10** Press **Save & Send** to deliver it now, or **Save as Draft** to send it later.

Good to know

- You must give a client name and at least one item, or the quote will not save.
- Only active services and packages appear in the lists.
- A package comes in at its fixed price. A package priced as *Sum with Discount* has no fixed price, so it arrives at GH¢ 0.00 — type the price in yourself on the summary line.
- The **Tax (GHS)** box here is a plain amount you type. It is not worked out from your VAT settings the way an invoice is.
- **Save & Send** needs an email address or a phone number on the quote. Without one, sending will fail.
- **Notes** are for your team. **Terms & Conditions** are for the family.

7.11 One quote

WHAT THIS SCREEN IS FOR

following a quote from sent, to accepted, to a real case.

HOW TO GET HERE

Sidebar → Finance → Quotes, then press any line.

WHAT YOU SEE ON THE SCREEN

A **Back** button, the quote number, its status badge and when it was created. The buttons beside it depend on the status:

- Always: **Print**.
- Draft: **Send Quote** and a red **Delete**.
- Sent: **Mark as Viewed** and **Resend**.
- Viewed: **Mark Accepted** and **Mark Declined**.
- Accepted: **Convert to Case**.

- Expired: **Extend**.

Below that, **Client Information** (name, email, phone, client type) and **Dates** (Valid Until, Sent At, Accepted At, Declined At, Converted At, Created) sit side by side.

Then **Line Items** with description, quantity, unit price and total, and a summary showing Subtotal, Tax, Discount and **Total**. Any **Notes** and **Terms & Conditions** follow at the bottom.

The screenshot displays the Sankorra Facility Dashboard interface. On the left is a sidebar with navigation links: Finance, Billing Overview, Case Invoices, Payments, Pricing (selected), Packages, Quotes, and Pre-arrangement. The main content area shows an accepted quote for 'Smith Funeral Home'. At the top, there's a banner about operating under a provisional licence. Below this, the quote ID 'QT-00002' is shown with a 'Sent' status and creation time. The 'Client Information' panel lists details for 'Chapel benadkojo@gmail.com'. The 'Dates' panel shows 'Valid Until', 'Sent At' (Sep 14, 2026, 4:27 PM), and 'Created' (Sep 12, 2026, 7:25 PM). The 'Line Items' table lists 'Transport (Hearse)' and 'After party' with their respective quantities, unit prices, and totals. Action buttons like 'Print', 'Mark as Viewed', and 'Resend' are present. A bottom bar shows the user is logged in as 'demo@sankorra.com'.

One accepted quote showing the client panel, the dates panel, the line items and the Convert to Case button

WHAT YOU CAN DO HERE

To send or resend a quote:

- 1 Press **Send Quote**, or **Resend** if it has gone out before.
- 2 Wait for the message telling you which routes worked — email, SMS, or both.
- 3 If one route failed you are told which. Correct the email or phone on the quote and send again.

To follow the quote along as you hear from the family:

- 1 Press **Mark as Viewed** once you know they have seen it.
- 2 Press **Mark Accepted** when they agree, or **Mark Declined** when they do not.

To turn an accepted quote into a case:

- 1 Press **Convert to Case**.
- 2 Type the deceased's **First Name** and **Last Name**. Both are required.
- 3 Add **Other Names** and the **Date of Death** if you have them.
- 4 Press **Convert to Case**.
- 5 The new case opens.

To give a family more time:

- 1** Press **Extend**.
- 2** Choose a new **Valid Until Date**.
- 3** Press **Extend**.

Good to know

- Sending a quote uses whatever the quote has: an email address, a phone number, or both. You are told plainly which succeeded and which failed.
- Converting a quote creates a new case at Intake carrying the quote's total. Service lines are copied across as services on the case, and a package is opened out into its services that are not optional. Custom lines and services without a price list entry are **not** attached — a note is added to the case telling you how many lines to go back and check on the quote.
- A quote can only be converted once. After that its status reads Converted and it points at the case.
- Deleting a quote sends it to the Recycle Bin, so an administrator can put it back.
- **Print** prints the quote as you see it on the screen, without the buttons.
- The name on the quote is the person paying. The deceased's name is asked for separately when you convert, because at quoting time there may not be one yet.

7.12 Pre-arrangement

WHAT THIS SCREEN IS FOR

funeral plans a family signs up for and pays off over time, while the beneficiary is still alive. When the family files a claim, the plan opens a case at no further charge.

HOW TO GET HERE

Sidebar → Finance → Pre-arrangement.

WHAT YOU SEE ON THE SCREEN

The title **Pre-arrangement** and two tabs: **Subscriptions** and **Plans**.

On the **Plans** tab, a **New plan** button and one panel per plan showing the plan name, a **Featured** badge, an **Inactive** badge where it applies, the description, the total price, how many instalments are allowed, a pencil and a bin.

The plan window asks for **Plan name**, **Description**, **Total price (GHS)**, **Max instalments**, **Terms & conditions**, and **Active** and **Featured** switches.

On the **Subscriptions** tab there is a row of filter buttons — All, Active, Paid in full, Lapsed, Claimed, Redeemed — plus **Refresh** and **New subscription**. Each subscription panel shows the beneficiary's name, the status badge, the plan badge, who pays and their relationship and phone, then how much has been paid out of the total, the balance, and when they signed up. A **Record payment** button appears while a balance remains, and a **File claim** button while the plan is Active or Paid in full. Pressing the panel itself opens the full details with the payment history.

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Pre-arrangement

Funeral plans that families sign up for and pay across instalments. When a claim is filed, the plan triggers a case with no further charge.

Subscriptions Plans

All Active Paid in full Lapsed Claimed Redeemed [Refresh](#) [+ New subscription](#)

Kofi Jnr **Claimed** **Smith Standard Plan**
Paid by Bernard (Son) · +233550916600
GH¢8,500.00 / GH¢8,500.00 · signed up Sep 12, 2026

Margaret Asare **Active** **Smith Standard Plan**
Paid by Sarah Asare (Daughter) · +233 24 555 0211 [Record payment](#)
GH¢2,833.32 / GH¢8,500.00 · GH¢5,666.68 balance · signed up Feb 25, 2026 [File claim](#)

Joseph Mensah **Claimed** **Smith Premium Plan**
Paid by Joseph Mensah (Self) · +233 20 555 0188
GH¢14,500.00 / GH¢14,500.00 · signed up Apr 25, 2025

Akwasi Frimpong **Claimed** **Traditional Akan Rites Plan**
Paid by Kweku Frimpong (Son) · +233 26 555 0142
GH¢22,000.00 / GH¢22,000.00 · signed up Jun 25, 2023 [Ask Kofi](#)

Logged in as **demo@sankorra.com**
[Sign out](#)

The Subscriptions tab with the status filter buttons and two subscriptions showing amount paid, balance and the Record payment and File claim buttons

WHAT YOU CAN DO HERE

To set up a plan families can join:

- 1 Open the **Plans** tab.
- 2 Press **New plan**.
- 3 Type the **Plan name**.
- 4 Describe what is included in **Description**.
- 5 Type the **Total price (GHS)**.
- 6 Type **Max instalments** — for example 12 for monthly payments across a year. Leave it empty for no limit.
- 7 Type your **Terms & conditions**, covering what is included, the claim conditions and your refund policy.
- 8 Leave **Active** on and press **Create**.

To sign a family up:

- 1 Open the **Subscriptions** tab.
- 2 Press **New subscription**.
- 3 Choose the **Plan**.
- 4 Type the **Beneficiary name** — the person the plan is for — and their **Date of birth**.
- 5 Type the **Subscriber name** — the person paying — and their **Relationship**, for example Self, Son or Wife.
- 6 Type the **Subscriber phone**.

7 Press **Create subscription**.

To take an instalment:

- 1 Press **Record payment** on that subscription.
- 2 Check the **Amount**. It starts at the full balance.
- 3 Choose the **Method** — Cash, MTN MoMo, Telecel MoMo, AirtelTigo Money, Bank transfer or Other.
- 4 Type the **Reference** — the MoMo transaction number or cheque number.
- 5 Press **Record**.

To start work when the beneficiary has died:

- 1 Press **File claim** on that subscription.
- 2 Read the confirmation and accept it.
- 3 A new case is created for the beneficiary and opens straight away. The subscription is marked **Claimed** and linked to the case.

Good to know

- The price is locked in at sign-up. Later price rises do not touch an existing subscription — that is the point of the plan.
- The amount paid and the balance look after themselves as you record payments. When the balance reaches zero, an Active subscription becomes **Paid in full** by itself.
- You cannot record more than the balance due.
- **File claim** only appears while the subscription is Active or Paid in full, and it goes ahead even where a balance remains. Check the balance before you press it.
- Deleting a plan stops new families signing up to it. Subscriptions already on that plan carry on as normal.
- The statuses **Lapsed** and **Cancelled** are not set from this screen. They exist so the list can be filtered, but the buttons here only move a subscription to Paid in full or Claimed.
- Pre-arrangement payments are kept in their own ledger. They do not appear on the Payments screen with your case-invoice payments.

Here is what each subscription status means:

Status	What it means
Active	Signed up, instalments still coming in.
Paid in full	Fully paid, waiting on a claim.
Lapsed	Payments stopped past the grace period.
Claimed	The beneficiary has died and a case has been opened.
Redeemed	The service is complete and the plan is closed.
Cancelled	The family cancelled.

CHAPTER 8

Regulator and compliance

The regulator for funeral facilities is MOFFA. Three screens sit under **REGULATOR** on the sidebar: the documents and rates MOFFA publishes, the instructions MOFFA gives you directly, and the fees MOFFA charges you.

Keep these three tidy. A missed acknowledgement or an unpaid fee can put your licence at risk, and a suspended licence stops you issuing invoices and opening cases.

8.1 MOFFA Resources

WHAT THIS SCREEN IS FOR

one place for MOFFA's forms, the government-approved rate tables, MOFFA's bank details, and the forms you have sent back to them.

HOW TO GET HERE

Sidebar → Regulator → MOFFA Resources.

WHAT YOU SEE ON THE SCREEN

The title **MOFFA Resources** and three tiles: **Published resources**, **Active fee lines** and **My submissions**. If MOFFA has marked anything as featured, a note lists those titles.

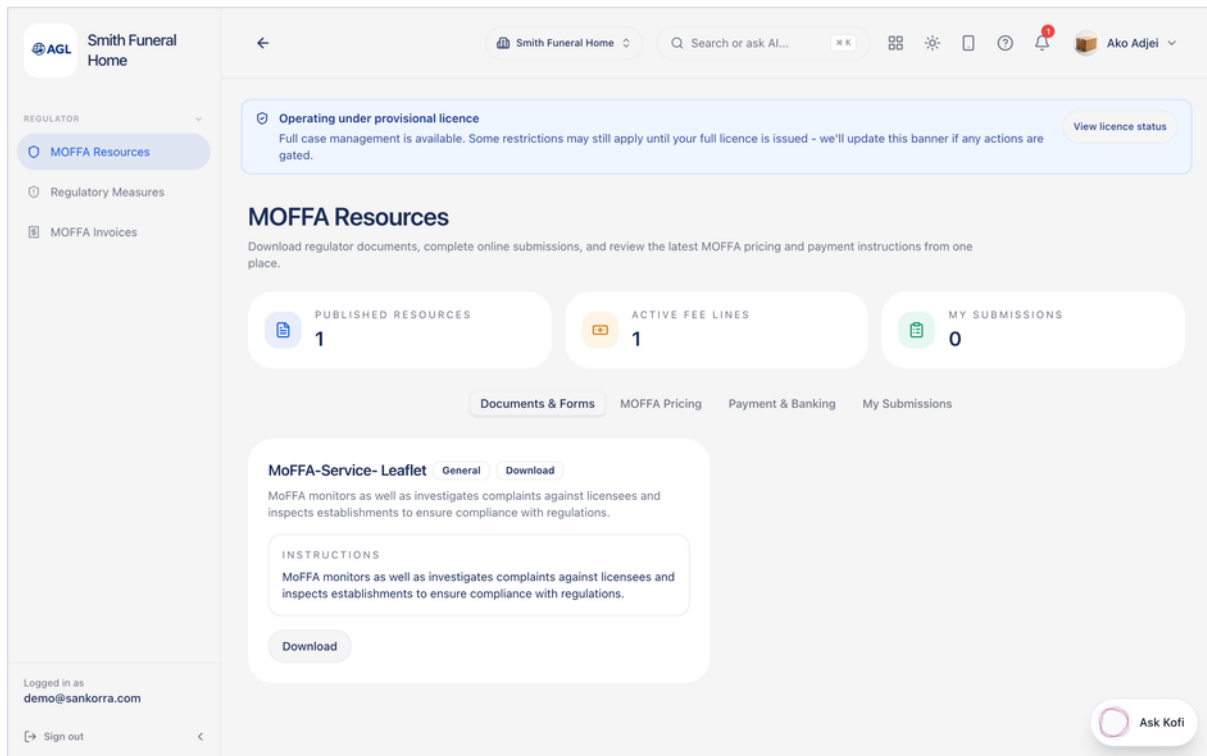
Then four tabs.

Documents & Forms shows a panel per resource, each with a title, a category badge, a badge reading **Download**, **Online Form** or **Download + Form**, the description, an **Instructions** box, and buttons: **Download** where a file has been published, and **Fill Online** where MOFFA has provided a form.

MOFFA Pricing shows two tables headed *Government Approved Rates for Facilities* and *Government Approved Rates for Practitioners*, with the note "See ACT 1080 Amended: L.I 2481". The facility table splits into local facilities in GH¢ and foreign facilities in US dollars, each with a registration or application fee, first-time and re-inspection fees, and provisional and long-term licensing fees. Notes underneath explain that a provisional licence runs six months, a long-term licence runs three years, a yearly retention fee is charged after a long-term licence expires, and penalty charges may apply for non-compliance. A disclaimer states the chart is for easy communication only and the Fees and Charges Act is the final reference.

Payment & Banking shows MOFFA's own instructions, their bank accounts (bank name, account name, account number, branch and SWIFT code), the payment methods they accept, a reminder to quote your invoice number on the transfer so MOFFA's finance team can match it, and their finance contact details.

My Submissions shows a panel per form you have sent, with the form title, its category, the date you sent it, a status badge, the first few answers you gave, and any notes MOFFA has written back.



MOFFA Resources on the Documents & Forms tab, showing resource panels with Download and Fill Online buttons

WHAT YOU CAN DO HERE

To download a MOFFA form to fill in on paper:

- 1** Open the **Documents & Forms** tab.
- 2** Read the **Instructions** box on the resource.
- 3** Press **Download**.

To fill in a MOFFA form on screen and send it:

- 1** Open the **Documents & Forms** tab.
- 2** Press **Fill Online** on the resource.
- 3** Work through each field. Fields marked with a red star must be filled.
- 4** Add anything MOFFA should know in **Notes For MOFFA**.
- 5** Press **Submit To MOFFA**.
- 6** The form now appears on the **My Submissions** tab.

The screenshot shows the Smith Funeral Home dashboard. The top navigation bar includes the Sankorra logo, the user's name 'Ako Adjei', and a search bar. The left sidebar lists 'REGULATOR' with options for 'MOFFA Resources', 'Regulatory Measures', and 'MOFFA Invoices'. The main content area features a banner for 'Operating under provisional licence'. Below this is the 'MOFFA Resources' section, which includes three cards: 'PUBLISHED RESOURCES' (1), 'ACTIVE FEE LINES' (1), and 'MY SUBMISSIONS' (0). At the bottom of the main content area, there are tabs for 'Documents & Forms', 'MOFFA Pricing', 'Payment & Banking', and 'My Submissions'. The 'MOFFA-Service- Leaflet' is displayed with 'General' and 'Download' tabs. The user is logged in as 'demo@sankorra.com'.

The online form window with several fields filled in and the Notes For MOFFA box

To check what a licence stage will cost you:

- 1 Open the **MOFFA Pricing** tab.
- 2 Find your category and location down the left of the facilities table.
- 3 Read across the **LOCAL FACILITIES (GH¢)** columns.

To pay a MOFFA invoice by bank transfer:

- 1 Open the **Payment & Banking** tab.
- 2 Copy the account details for the bank you are using.
- 3 Make the transfer, quoting your MOFFA invoice number as the reference.

Good to know

- Everything on the first three tabs is published by MOFFA. You cannot change it. If a tab is empty, MOFFA has **not** published anything there yet.
- A resource marked **Download** has no online form. One marked **Online Form** has no file. **Download + Form** has both.
- Your submission can read Submitted, Under review, Accepted, Returned or Closed. A **Returned** submission normally has a MOFFA note explaining what to fix — read it, then send the form again.
- Always put your invoice number on a bank transfer. Without it MOFFA's finance team cannot match the payment to your account, and the invoice stays showing as unpaid.
- The rate tables are a convenience. The law, not this chart, decides what you owe.

8.2 Regulatory Measures

WHAT THIS SCREEN IS FOR

instructions MOFFA has issued directly to your facility, what you must do about each one, and where you send back your evidence.

HOW TO GET HERE

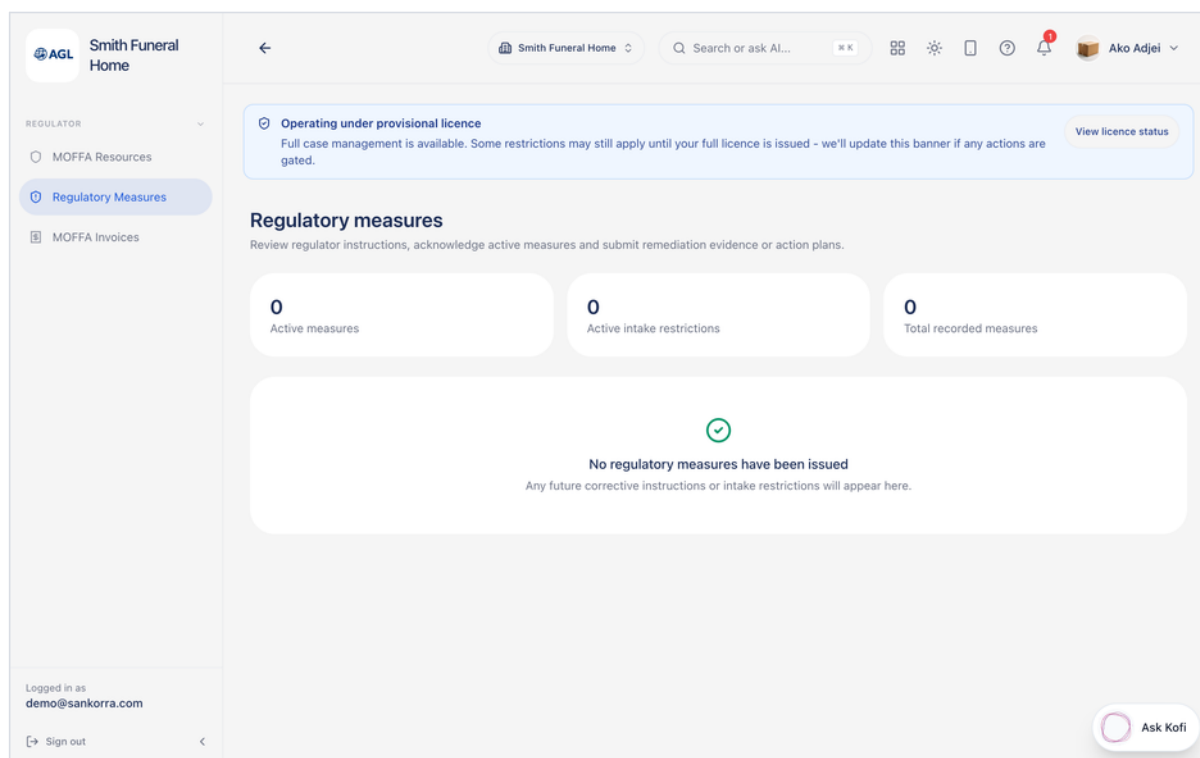
Sidebar → Regulator → Regulatory Measures.

WHAT YOU SEE ON THE SCREEN

The title **Regulatory measures** and three tiles: **Active measures**, **Active intake restrictions** and **Total recorded measures**.

Then one panel per measure, with the active ones first and the newest first within those. Each panel shows:

- The measure title, with a shield symbol and a red border when it is an intake restriction.
- The kind of measure underneath the title.
- A priority badge — routine, high, urgent or critical — and a status badge.
- **Reason** — why MOFFA issued it.
- **Required action** — what you must do. This is the part to act on.
- Three dates: when it was **Issued**, its **Deadline**, and when it **Expires**.
- On an active intake restriction, a red panel warning that normal intake routes are blocked by Sankorra and that emergency intake is only possible through the documented management override where the regulator has allowed it.
- An **Acknowledge measure** button, or a green line reading "Acknowledged" with the date once you have.
- On an active measure, a **Submit response / evidence note** box, a **Supporting evidence** file picker, and a **Submit to regulator** button.
- **Response history** — every response you have sent, with its kind, its status, your wording, buttons to open each piece of evidence, and any note the regulator has written back.



Regulatory measures with one active corrective action plan showing the Reason, Required action, the response box and the evidence picker

WHAT YOU CAN DO HERE

To acknowledge a measure:

- 1 Read the **Reason** and the **Required action** in full.
- 2 Press **Acknowledge measure**.
- 3 The button is replaced by a green line with the date and time.

Acknowledge as soon as you have read it. Acknowledging tells MOFFA you have received the instruction. It does not say the work is done.

To send your evidence or your action plan:

- 1 Do the work MOFFA asked for.
- 2 In **Submit response / evidence note**, describe what you did — the corrective action taken, the transfer arrangements made, or the progress so far.
- 3 Press the **Supporting evidence** picker and choose your files.
- 4 Check the file names in the list. Use the cross to drop any you picked by mistake.
- 5 Press **Submit to regulator**.
- 6 Your response appears in **Response history** marked Submitted.

To look at evidence you sent before:

- 1 Scroll to **Response history**.
- 2 Press **Evidence 1**, **Evidence 2** and so on. Each opens in a new tab.

Good to know

Here is what each measure status means:

Status	What it means
Issued	MOFFA has sent it; you have not acknowledged it yet.
Acknowledged	You have confirmed you received it.
In progress	Work is under way.
Complied	MOFFA has accepted that you met it.
Withdrawn	MOFFA has taken it back.
Expired	It has passed its expiry date.

- Issued, Acknowledged and In progress all count as **active**. Only active measures can be acknowledged or responded to. Once a measure is closed, the panel becomes a read-only history.
- Your response must have either a meaningful note of at least ten characters or at least one file attached, or the **Submit to regulator** button will refuse.
- Evidence files may be PDF, JPG, PNG, WEBP or DOCX, up to 15 MB each, and at most ten files at a time. They go into private regulator evidence storage — nobody outside your facility and MOFFA can see them.
- **Intake restriction** is the most serious kind. While one is active, Sankorra blocks the normal ways of taking in a new body. Do not look for a way round it; deal with the restriction and get it lifted.
- Each response can come back Submitted, Accepted, Needs revision or Rejected. Needs revision and Rejected usually carry a **Regulator note** — read it, then send a fresh response.
- Nothing on this screen can be created or edited by your facility except your own acknowledgements and responses. The measures themselves come from MOFFA.

8.3 MOFFA Invoices

WHAT THIS SCREEN IS FOR

every fee MOFFA has charged your facility, what is still owed, and where to get the invoice or the receipt.

HOW TO GET HERE

Sidebar → Regulator → MOFFA Invoices.

WHAT YOU SEE ON THE SCREEN

The title **MOFFA invoices** with the line "Every regulator-issued fee for your facility — registration, inspection, licence, retention, and any penalties", and a **Download statement** button.

If anything is past its due date, a red warning appears at the top telling you to settle overdue MOFFA invoices to avoid penalties or licence suspension, and to use the reference number on each invoice when paying.

Four tiles follow: **Outstanding**, **Paid this year**, **Next due** and **Total billed (all-time)**.

Then a panel headed **All invoices** with a count and a status filter (All statuses, Outstanding, Paid, Waived, Refunded), and the list itself:

- **Kind** — for example Registration fee, First-time inspection fee, Re-inspection fee, Provisional license fee, Long-term license fee, Annual retention or Penalty — with the application number or financial year underneath.
- **Invoice #**.
- **Issued** and **Due**. A due date in the past is red and bold; one inside the next seven days is amber.
- **Amount** and **Balance**. An outstanding balance is red.
- **Status**.
- **Actions** — buttons to download the invoice and the receipt, and on retention and penalty fees a **Pay now** button where a balance remains.

At the very bottom is MOFFA's finance email address for questions about a charge.

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

MOFFA invoices
Every regulator-issued fee for your facility - registration, inspection, licence, retention, and any penalties. [Download statement](#)

⚠️ **One or more invoices are overdue**
Settle overdue MoFFA invoices to avoid penalties or licence suspension. Use the reference number on each invoice when paying.

Outstanding: **GHS 1,500.00**
 Paid this year: **GHS 16,500.00**
 Next due: **30 May 2026**
 Total billed (all-time): **GHS 18,000.00**

All invoices
3 records

Kind	Invoice #	Issued	Due	Amount	Balance	Status	Action
Provisional license fee Application FA-20260516-CCF0F4E2	PLIC-2026-000001	16 May 2026	30 May 2026	GHS 1,500.00	GHS 1,500.00	Awaiting payment	Download
First-time inspection fee Application FA-20260516-CCF0F4E2	INSP-2026-000001	16 May 2026	30 May 2026	GHS 13,500.00	-	Paid	Download Receipt
Registration fee Application FA-20260516-CCF0F4E2	REG-2026-000001	16 May 2026	30 May 2026	GHS 3,000.00	-	Paid	Download Receipt

Logged in as **demo@sankorra.com**
[Sign out](#)

[Ask Kofi](#)

MOFFA invoices with the four tiles, one overdue line in red and the Pay now button on a retention fee

WHAT YOU CAN DO HERE

To see what you owe MOFFA right now:

- 1 Read the **Outstanding** tile.
- 2 Open the status filter and choose **Outstanding**.

3 Check the **Due** column for anything already in red.

To pay a retention fee or a penalty online:

- 1 Find the line and press **Pay now**.
- 2 The payment provider's page opens. Complete the payment there.
- 3 You are brought back to this screen afterwards.

To get a copy of an invoice or a receipt:

- 1 Find the line.
- 2 Press the document button to download the invoice.
- 3 Press the receipt button to download the receipt. This only appears once some money has been paid against that fee.

To give your accountant or MOFFA a full history:

- 1 Press **Download statement**.
- 2 A single document covering every fee, paid and unpaid, is saved to your computer.

Good to know

Here is what each fee status means:

Status	What it means
Awaiting payment	Invoiced and not yet paid.
Part paid	Some money received; a balance remains.
Paid	Settled in full.
Waived	MOFFA has cancelled the charge.
Refunded	MOFFA has returned the money.

- **Pay now** is only offered on annual retention and penalty fees. Licence-stage fees — registration, inspection and licensing — are paid by bank transfer using the details on the Payment & Banking tab of MOFFA Resources, quoting the invoice number.
- **Pay now** needs an email address on your own user profile. If it complains, add your email in your profile and try again.
- If the list is empty you have not yet submitted a licence application. The **Go to licence status** button takes you to where you can.
- A receipt button only appears once a payment has landed against that fee.
- Letting a MOFFA invoice run overdue can attract penalties and, in the end, licence suspension — which stops you opening cases and issuing invoices. Treat the red warning at the top of this screen as urgent.

CHAPTER 9

Your public storefront

Your storefront is a small public website of your own. Families can browse your caskets, urns and service packages on their phones, put together a short list, and send you a message. Those messages land in **Inquiries**.

Nothing appears on the storefront by accident. You choose every item and every package that is published.

9.1 Inquiries

WHAT THIS SCREEN IS FOR

the messages families send you from your storefront: answering them, handing them to a member of staff, and making sure nothing is forgotten.

HOW TO GET HERE

Sidebar → Storefront → Inquiries.

WHAT YOU SEE ON THE SCREEN

The title **Inquiries** with the line "Messages from families that came in through your storefront", a **Refresh** button and a **Share storefront** button.

Four tiles: **New**, **In progress**, **Responded (7 days)** and **Total**.

A row of filter buttons — All, New, In progress, Responded, Closed — and a search box that looks through names, email addresses and message text.

Then one panel per message, showing:

- The family member's name, the status badge, a badge for the item or the number of items they asked about, a badge with the staff member it is assigned to, and a red **Follow-up overdue** badge where the follow-up date has passed.
- What they are enquiring about, and the name of the deceased where they gave one.
- The first couple of lines of the message.
- Their email address and phone number, when the message arrived, and the follow-up date.

Press a panel to open the full message. Inside you will find their contact details as links you can press to call or email, the bereavement details they gave (what they are enquiring about, the deceased's name, their relationship), the list of items, the full message, a **Status** list, an **Assigned to** list, a **Follow-up date** box, a **Reply by email** button, a **Quick reply template** list, a **Staff notes** box with a **Save notes** button, and a red **Delete** button.

Smith Funeral Home

STOREFRONT

- Inquiries** 3
- View storefront
- Storefront settings

Logged in as **demo@sankorra.com**

Sign out

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Inquiries
Messages from families that came in through your storefront.

Refresh Share storefront

New 3 In progress 0 Responded (7 days) 0 Total 3

All New In progress Responded Closed

Search name, email, message...

Appiedu Bernard New Cedar Elite Casket
Is it negotiable? - re Kofi Snr
I'd like to know more about: Cedar Elite Casket.
benadkojo@gmail.com +233550916600 Sep 12, 2026, 8:10 PM

Bernard New Mahogany Premium Casket
Full price and payment plan
I'd like to know more about: Mahogany Premium Casket.
bernardbotchway801@gmail.com 0549681355 Sep 12, 2026, 8:08 PM

Yaa Adwoa New
I would like to know more about your caskets.
yaa@example.gh Jun 22, 2026, 10:25 PM

Ask Kofi

The Inquiries list with the four tiles, the status filter buttons and three messages, one carrying a Follow-up overdue badge

Smith Funeral Home

STOREFRONT

- Inquiries** 3
- View storefront
- Storefront settings

Logged in as **demo@sankorra.com**

Sign out

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

Inquiries
Messages from families that came in through your storefront.

Refresh Share storefront

New 3 In progress 0 Responded (7 days) 0 Total 3

All New In progress Responded Closed

Search name, email, message...

Appiedu Bernard New Cedar Elite Casket
Is it negotiable? - re Kofi Snr
I'd like to know more about: Cedar Elite Casket.
benadkojo@gmail.com +233550916600 Sep 12, 2026, 8:10 PM

Bernard New Mahogany Premium Casket
Full price and payment plan
I'd like to know more about: Mahogany Premium Casket.
bernardbotchway801@gmail.com 0549681355 Sep 12, 2026, 8:08 PM

Yaa Adwoa New
I would like to know more about your caskets.
yaa@example.gh Jun 22, 2026, 10:25 PM

Ask Kofi

One inquiry opened, showing the contact details, the bereavement panel, the message, the Status and Assigned to lists and the Quick reply template list

WHAT YOU CAN DO HERE

To answer a family:

- 1 Press the message to open it.

- 2 Read the message and the item list.
- 3 Press their phone number to ring them, or **Reply by email**.
- 4 Or pick a **Quick reply template** — Acknowledge inquiry, Share pricing or Invite to visit — which opens your email program with the message already written and the family's name filled in.
- 5 Set **Status** to **Responded**.

To hand a message to a colleague:

- 1 Open the message.
- 2 Open the **Assigned to** list.
- 3 Choose the staff member. Their name now shows on the message in the list.

To make sure you come back to it:

- 1 Open the message.
- 2 Set the **Follow-up date**.
- 3 If that date passes while the message is still New or In progress, a red **Follow-up overdue** badge appears on it in the list.

To leave a note for your team:

- 1 Open the message.
- 2 Type into **Staff notes**.
- 3 Press **Save notes**.

To send a family your shop address:

- 1 Press **Share storefront**.
- 2 See 9.2 for what that window offers.

Good to know

Here is what each status means:

Status	What it means
New	Nobody has picked it up yet.
In progress	Someone is working on it.
Responded	You have replied to the family.
Closed	Finished; no more action needed.

- **Responded (7 days)** counts messages you marked as Responded in the last seven days. It is your best measure of how quickly your team is answering families.
- The **Follow-up overdue** badge only shows while a message is still New or In progress. Marking it Responded or Closed clears it.

- A quick reply template opens your own email program — Sankorra does not send it for you, so you can read it over and change it before it goes. Where the family left no email address, the wording is copied to your clipboard instead so you can paste it into WhatsApp or an SMS.
- **Staff notes** are private to your team. The family never sees them.
- Deleting an inquiry sends it to the Recycle Bin, so an administrator can put it back.
- This whole Storefront section of the sidebar only appears when the Storefront add-on is installed for your facility. If you cannot see it, ask your administrator to install it from the Download Center.

9.2 View storefront

WHAT THIS SCREEN IS FOR

opening your own public shop exactly as a family sees it, and getting the address, the QR code and a ready-written message to send them.

HOW TO GET HERE

Sidebar → Storefront → **View storefront**. This opens your shop in a new tab. The sharing tools are behind the **Share storefront** button on the Inquiries screen.

WHAT YOU SEE ON THE SCREEN

Your shop has its own web address, made from your facility's short name followed by sankorra.com and ending in /shop. What a family sees there is:

- Your facility's name and branding at the top.
- A **Search items** box and a row of category buttons, starting with **All**.
- A sort list — Recommended, Price: Low to High, Price: High to Low, Name: A-Z, Name: Z-A, Newest — and a filter panel with an in-stock switch and minimum and maximum price boxes.
- A card for each item you have published, with its picture, its name and its price, and a plus button to add it to their enquiry.
- A card for each package you have published, with the same plus button.
- An enquiry form where they give their name, their email or phone, the name of the deceased, their relationship, what they are enquiring about, and their message.

The **Share your storefront** window gives you:

- **Public URL** — your shop address, with a copy button and a button to open it.
- A QR code with a **Download QR** button, for printing at reception, on flyers or on the back of business cards.
- **Share via WhatsApp**, **Share via SMS** and **Share via email** buttons.
- A **Message** box you can edit before sending. The share buttons use whatever is in this box.

The screenshot displays the Sankorra Facility Dashboard. On the left sidebar, there's a 'STOREFRONT' section with 'Inquiries' (3), 'View storefront', and 'Storefront settings'. The main content area features a banner for 'Operating under provisional licence'. Below this, the 'Inquiries' section shows a summary: New (3), In progress (0), Responded (7 days) (0), and Total (3). A list of inquiries follows, including 'Appiedu Bernard' (New, Cedar Elite Casket), 'Bernard' (New, Mahogany Premium Casket), and 'Yaa Adwoa' (New). Each inquiry includes a message and contact details. A 'Share storefront' button is located in the top right of the inquiries section.

The Share your storefront window with the public address, the QR code and the WhatsApp, SMS and email share buttons

WHAT YOU CAN DO HERE

To check what families are actually seeing:

- 1 Press **View storefront** in the sidebar.
- 2 Your shop opens in a new tab.
- 3 Check that every item has a picture and a price, and that nothing you meant to hide is showing.

To send a family your shop address on WhatsApp:

- 1 Open Inquiries and press **Share storefront**.
- 2 Read the **Message** and change the wording if you wish.
- 3 Press **Share via WhatsApp**.
- 4 Choose the family in WhatsApp and send.

To put a QR code at your reception desk:

- 1 Open Inquiries and press **Share storefront**.
- 2 Press **Download QR**.
- 3 Print the picture and put it where families will see it.

Good to know

- **View storefront** is hidden when your facility has no short name set up. If you cannot see it, or the share window says your facility does not have one yet, contact Sankorra support to have it arranged.
- A family cannot buy on the storefront. They add items to an enquiry and send you a message. You then ring them and arrange everything as usual.
- An item only shows if you published it. A package only shows if it is marked both **Public** and **Active** (see 7.7).
- If an item runs out of stock it can be hidden from the shop by itself, so families do not enquire about something you cannot supply. Ask your administrator about the storefront settings under Settings → Notifications if you want that changed.
- Anything you write in an item's internal notes is never shown to families.

9.3 Storefront settings

WHAT THIS SCREEN IS FOR

the category buttons families use to filter your shop: adding them, renaming them, putting them in order and hiding them.

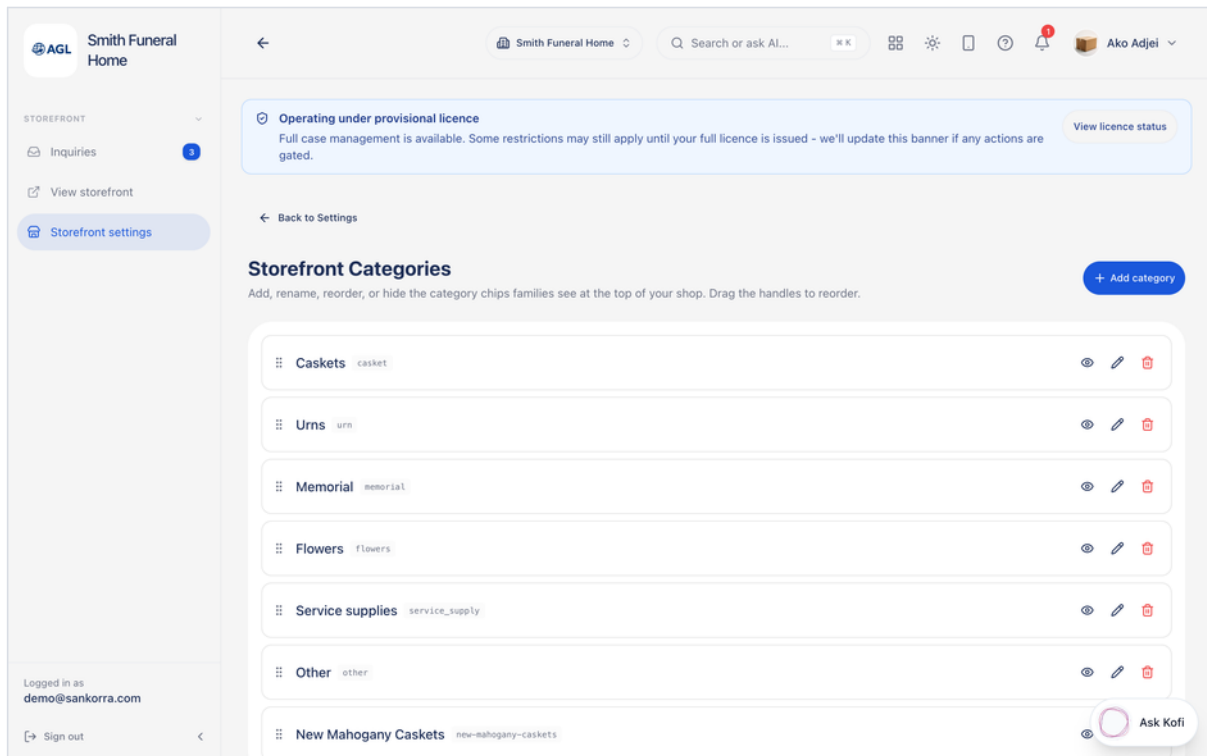
HOW TO GET HERE

Sidebar → Storefront → Storefront settings.

WHAT YOU SEE ON THE SCREEN

A **Back to Settings** button, then the title **Storefront Categories** with the line "Add, rename, reorder, or hide the category chips families see at the top of your shop. Drag the handles to reorder", and an **Add category** button.

Then one line per category. Each line has a grip handle on the left for dragging, the category name, its web-friendly short name, a **Hidden** badge where it is switched off, and three buttons on the right: an eye to hide or show it, a pencil to rename it, and a bin to delete it.



The Storefront Categories list with drag handles, one category marked Hidden, and the eye, pencil and bin buttons

WHAT YOU CAN DO HERE

To add a category:

- 1 Press **Add category**.
- 2 Type the **Category name**, for example Adinkra caskets.
- 3 Check the short name shown underneath — that is what appears in the web address.
- 4 Press **Add**.
- 5 Go to Inventory and set that category on the items that belong in it.

To change the order families see:

- 1 Press and hold the grip handle on a line.
- 2 Drag it up or down.
- 3 Let go. The new order saves by itself.

To hide a category for now:

- 1 Press the eye button on that line.
- 2 The line gains a **Hidden** badge and the button becomes a crossed-out eye.
- 3 Press it again to bring the category back.

To rename a category:

- 1 Press the pencil on that line.
- 2 Type the new **Name**.
- 3 Press **Save**.

Good to know

- Renaming a category does **not** change its short name. That stays as it was, so any link you have already shared keeps working.
- Two categories cannot share the same name. You will be told if one already exists.
- Hiding a category takes the button off your shop. The items themselves stay published and families can still find them under **All items** and through search.
- Deleting a category leaves its items showing under **All items**. You can add a category with the same name again later.
- Categories on their own put nothing in your shop. An item shows because it is published in Inventory; the category only decides which button it sits behind.



CHAPTER 10

Workflow, reports and support

This chapter covers the last part of the sidebar: approving other people's work, keeping an eye on the clock, reading your numbers, and getting help when something goes wrong.

10.1 Approvals

WHAT THIS SCREEN IS FOR

work your colleagues cannot move forward until a manager says yes. Clear this list daily.

HOW TO GET HERE

Sidebar → Workflow → Approvals.

WHAT YOU SEE ON THE SCREEN

The title **Workflow Approvals** with the line "Review and manage pending workflow transition requests" and an **Export** button.

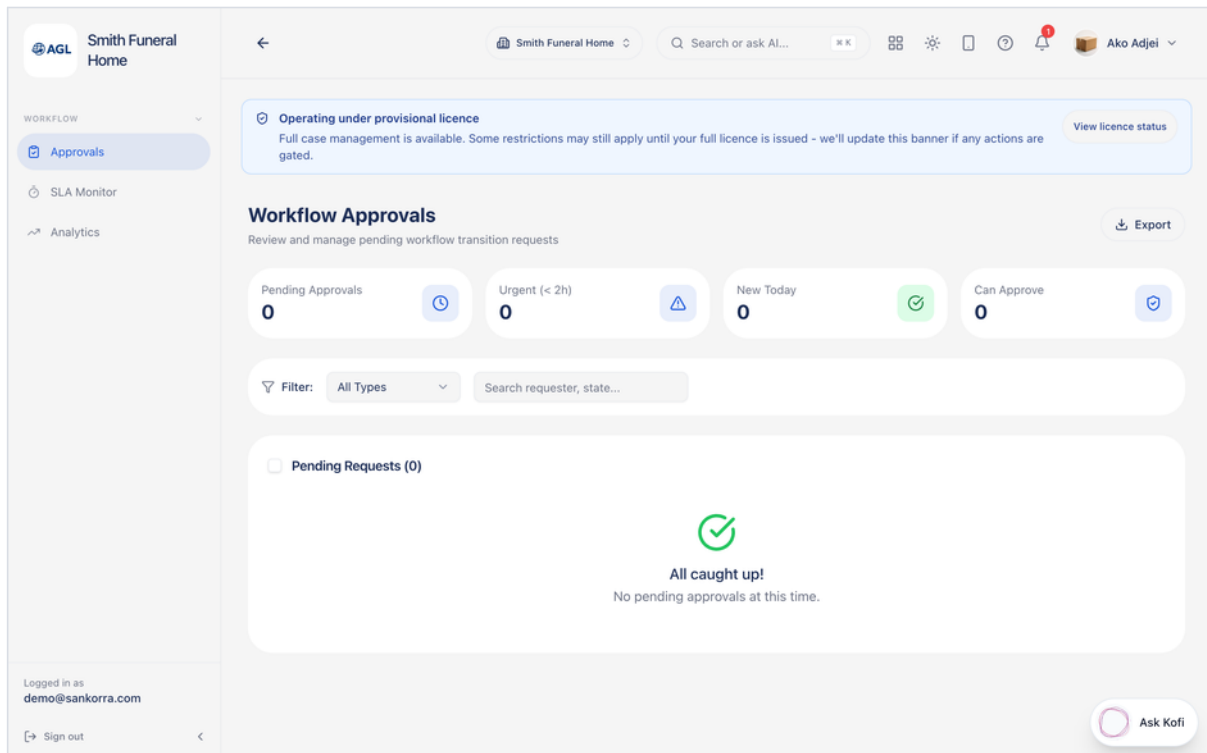
Four tiles: **Pending Approvals**, **Urgent (< 2h)**, **New Today** and **Can Approve**.

A filter panel with a list of the kinds of work — All Types, Cases, Invoices, Burials, Vehicles, Venues, Support — and a search box for the requester or the state. When you tick requests, buttons appear here to **Reject All** and **Approve All**.

Then one panel per request, with a tick box on the left and:

- The kind of work, its reference, an amber **Urgent** badge when the request runs out in under two hours, and a grey **Read only** badge when you are not the one who can approve it.
- The move being asked for: the state the work is in now, an arrow, and the state it would go to.
- Who asked, how long ago, and when the request runs out.
- Any note the requester left.
- Three buttons: an eye to open the work itself, a cross to reject, and **Approve**.

At the top of the list is a tick box that selects everything you are able to approve.



Workflow Approvals with the four tiles and three requests, one carrying an Urgent badge and one marked Read only

WHAT YOU CAN DO HERE

To approve one request:

- 1 Press the eye button to look at the case or invoice first.
- 2 Come back and press **Approve**.
- 3 Type a note if it helps the record. This is optional.
- 4 Press **Approve** in the window.

To reject one request:

- 1 Press the cross on that request.
- 2 Type the reason. This is required — the button stays greyed out until you do.
- 3 Press **Reject**.

To clear several at once:

- 1 Tick each request, or use the tick box at the top of the list.
- 2 Press **Approve All** or **Reject All** in the filter panel.
- 3 You are told how many went through and how many failed.

To keep a copy of what is outstanding:

- 1 Set the filters you want.
- 2 Press **Export**. A spreadsheet file is saved to your computer.

Good to know

- **Approve** and the reject cross are greyed out on requests you are not allowed to decide. Those requests carry a **Read only** badge. The **Can Approve** tile tells you how many of them you can actually act on.
- The tick box at the top only selects requests you can approve, so a bulk approval never fails halfway for that reason.
- **Urgent** means the request runs out in less than two hours. Deal with those first.
- Rejecting always needs a reason. Approving does not.
- **Reject All** files the reason as "Bulk rejected". If a particular reason matters, reject those requests one by one instead.
- The eye button opens the case, the invoice, the cemetery screen, the hearse fleet or the chapel, depending on the kind of work. For a kind with nowhere to go, you get a short message saying so.
- The Workflow section of the sidebar only appears when the Workflow add-on is installed. If you cannot see it, ask your administrator.

10.2 SLA Monitor

WHAT THIS SCREEN IS FOR

showing which pieces of work are running late against the time limits your facility has set, so you can step in before a family notices.

HOW TO GET HERE

Sidebar → Workflow → SLA Monitor.

WHAT YOU SEE ON THE SCREEN

The title **SLA Monitoring** with **Refresh** and **Export** buttons.

If any work sits in a state with no time limit set, a note appears explaining how many, and that they are listed but left out of the compliance figure until the set-up is fixed.

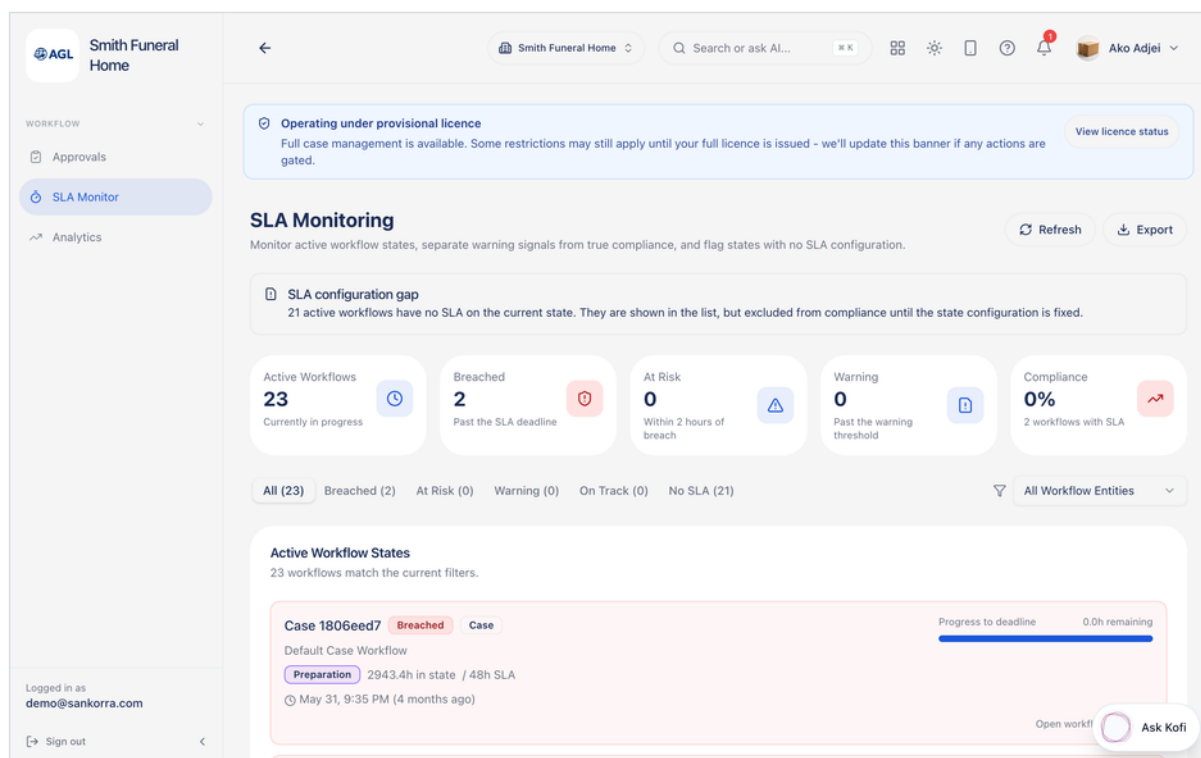
Five tiles: **Active Workflows**, **Breached**, **At Risk**, **Warning** and **Compliance**. The Compliance tile turns green at 90% or better, amber from 70%, and red below that.

Then a row of tabs with counts — All, Breached, At Risk, Warning, On Track, No SLA — and a filter for the kind of work.

Then one panel per piece of work, worst first:

- Its reference, its status badge and the kind of work.
- The workflow's name and any secondary reference.
- The state it is in now, how many hours it has been there, and the time limit for that state.
- The deadline, written out with how long away it is.
- On the right, a progress bar towards the deadline with the hours remaining. Where the state has no time limit, a dashed box says so and explains the work is left out of compliance.

Press any panel to open the case, invoice or booking behind it.



SLA Monitoring with the five tiles, the status tabs and two breached items showing red progress bars

WHAT YOU CAN DO HERE

To deal with work that has run out of time:

- 1 Press the **Breached** tab.
- 2 Press the first panel. The case or invoice opens.
- 3 Do whatever the state is waiting on — a signature, an approval, a phone call.
- 4 Move the work on to its next state.
- 5 Come back and press **Refresh**.

To head off a breach before it happens:

- 1 Press the **At Risk** tab. These have under two hours left.
- 2 Then press the **Warning** tab. These have passed their warning point but still have time.
- 3 Work down both lists.

To pass the list to a supervisor:

- 1 Set the tab and filter you want.
- 2 Press **Export**. A spreadsheet file is saved to your computer.

Good to know

Here is what each status means:

Status	What it means
Breached	The deadline has already passed.

Status	What it means
At Risk	Less than two hours left.
Warning	Past the warning point, deadline not yet reached.
On Track	Comfortably inside the deadline.
No SLA	This state has no time limit set, so it is not measured.

- A **breach** is not a fault in Sankorra. It means a piece of work has sat in one state longer than your facility said it should. The fix is always to move the work on.
- **Compliance** counts only the work that has a time limit. Work in a No SLA state is listed but never counts for or against you.
- If nearly everything reads **No SLA**, nobody has set time limits on your workflow states yet. Ask your administrator to set them; until then this screen cannot tell you much.
- Press **Refresh** after you have moved work along. The figures do not update by themselves while you sit on the page.

10.3 Analytics

WHAT THIS SCREEN IS FOR

reading your workflow history to see how much work you got through, how long each stage really takes, and where work piles up.

HOW TO GET HERE

Sidebar → Workflow → Analytics.

WHAT YOU SEE ON THE SCREEN

The title **Workflow Analytics** with **Refresh** and **Export** buttons.

A control panel with a **Workflow** list (All Workflows, or one of yours), a **Period** list (Last 7 days, Last 30 days, Last 90 days), and a line telling you when the figures were worked out and how many pieces of work went into them.

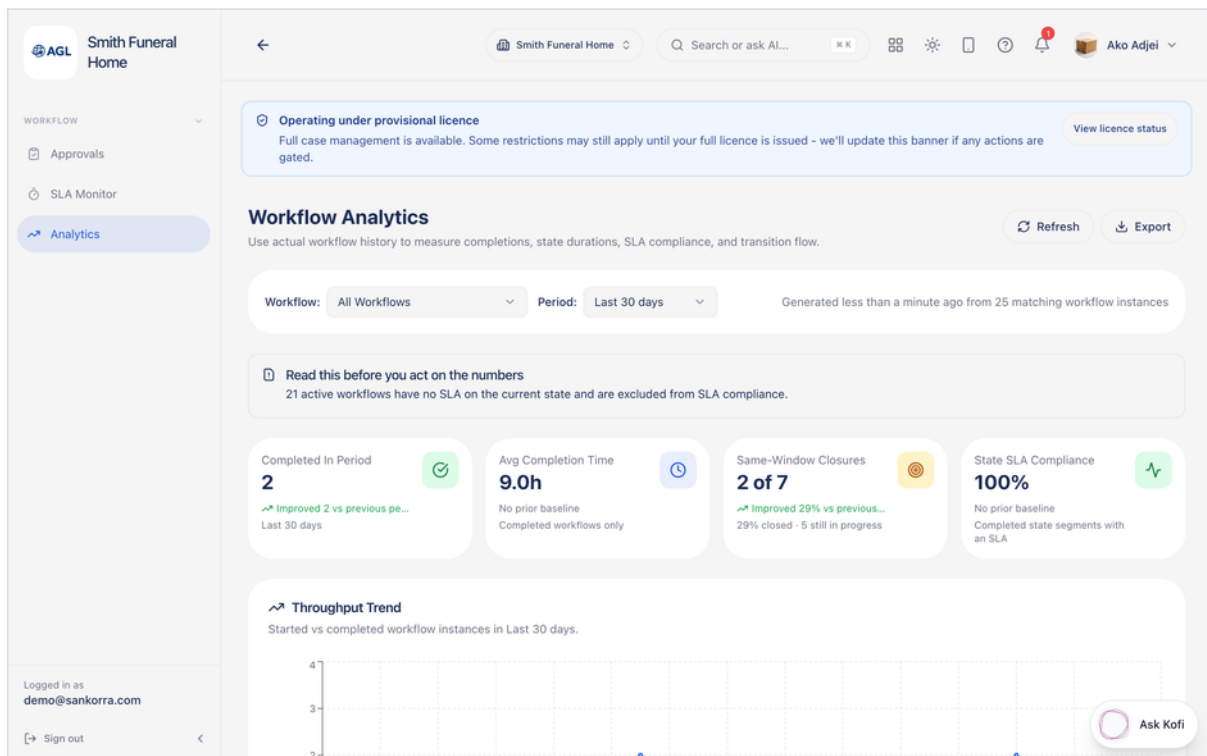
Where the numbers need a caveat, a note headed "Read this before you act on the numbers" spells it out. Where no state in the chosen workflow has a time limit set, a separate note says so and offers a button to go and set them.

Four tiles, each with an arrow showing the change against the previous period:

- **Completed In Period** — how many pieces of work finished.
- **Avg Completion Time** — the average time from start to finish, counting finished work only.
- **Same-Window Closures** — of the work that started inside this period, how much also finished inside it.
- **State SLA Compliance** — of the finished stages that had a time limit, how many kept inside it.

Then the charts and tables:

- **Throughput Trend** — a line chart of work started against work completed.
- **State Duration Breakdown** — a bar chart of the average time spent in each state.
- **Transition Flow** — the most common moves from one state to another.
- **Bottleneck Analysis** — panels for the states where work is piling up, each showing the average duration, how many finished examples it is based on, how many pieces of work are sitting there now, and how many of those are already overdue.
- **State Performance Detail** — the full per-state figures.



Workflow Analytics with the workflow and period lists, the four tiles and the Throughput Trend line chart

WHAT YOU CAN DO HERE

To find out where your work is getting stuck:

- 1 Choose **All Workflows** and **Last 90 days**.
- 2 Read the **Bottleneck Analysis** panels.
- 3 For each one, look at **Overdue Active** — that is work sitting there right now past its time.
- 4 Take the advice on the panel: check the approvals, the staffing and the hand-over rules around that state.

To compare this month with last:

- 1 Choose **Last 30 days**.
- 2 Read the arrow under each tile. It compares with the previous 30 days.

To take the figures into a meeting:

- 1 Set the workflow and period you want.
- 2 Press **Export**. A spreadsheet file is saved to your computer.

Good to know

- **Same-Window Closures** will often read 0% on a 7-day or 30-day period. Funeral work runs for weeks, so cases that started inside a short period have not had time to finish. The helper line underneath tells you how many are still in progress. A low figure here with work still running is normal, not a failure.
- **Within SLA, State SLA Compliance** and the bottleneck flags all read N/A when no state has a time limit set. That is a set-up gap, not missing data — the note on the page points you at where to fix it.
- **Avg Completion Time** counts finished work only. Work still open is not in it.
- The **Throughput Trend** chart only draws when something actually happened in the period. Otherwise it tells you in words what it found.
- A bottleneck is only flagged when a state has enough finished examples to judge, runs clearly slower than your other states, and still has work building up in it. That is deliberate — it keeps one slow case from being reported as a problem.

10.4 Reports

WHAT THIS SCREEN IS FOR

the numbers behind your facility, grouped into eight reports, each of which you can export as a document or a spreadsheet.

HOW TO GET HERE

Sidebar → Reports & Support → Reports.

WHAT YOU SEE ON THE SCREEN

The title **Reports & Exports** with the line "Use a live date range, review operational guardrails, and export the active report as CSV, JSON, or PDF", a **Client Report** button and a date range picker.

The date range picker offers Today, Yesterday, Last 7 days, Last 30 days, This month, Last month and This year, or you can pick your own dates on a calendar.

If a part of the page could not load, a note names which part and tells you the rest of the page still shows what did load.

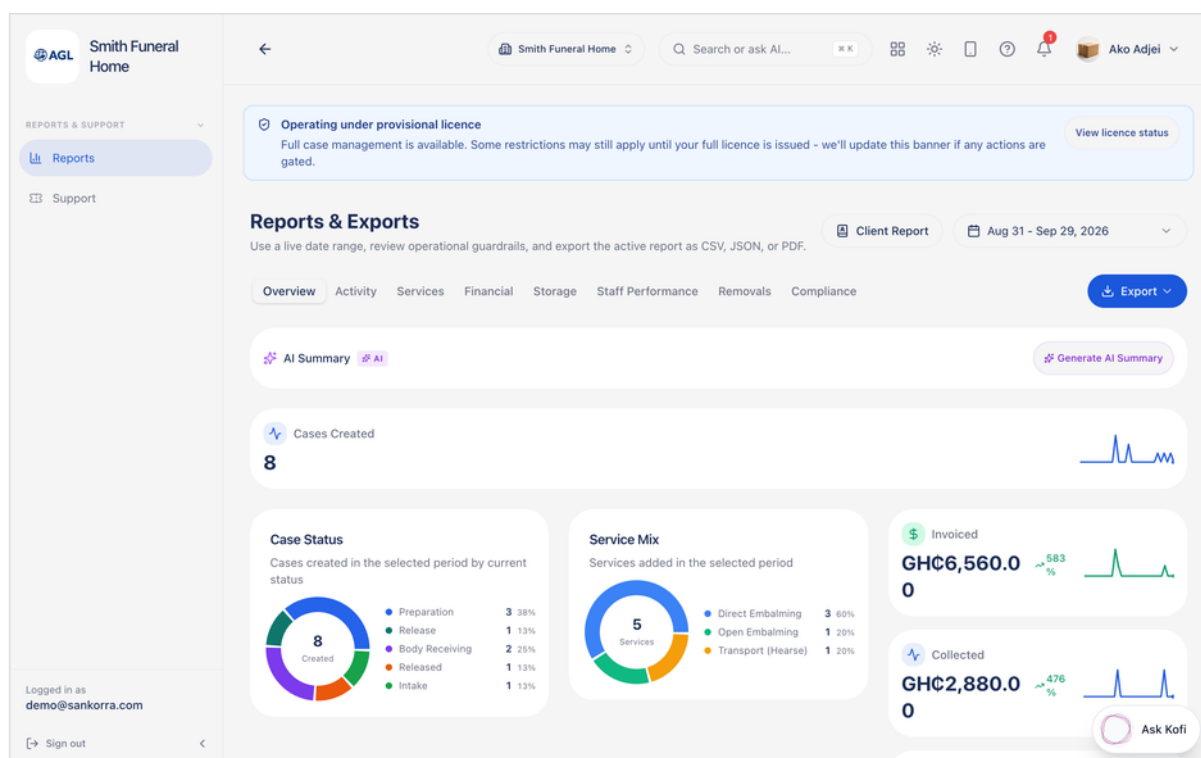
Then eight tabs, and an **Export** menu beside them offering **PDF report**, **CSV spreadsheet** and **JSON (raw data)**.

Here is what each tab answers:

Tab	What it tells you
Overview	Cases created, money collected, storage use, active workflow states
Activity	Cases created and completed over the period, plus cases open or in storage too long
Services	Which services you performed, their value, who did them and where

Tab	What it tells you
Financial	Invoiced, collected, open balance, overdue, and where payments came from
Storage	Use by unit type, capacity status, average stay, movements, longest tenants
Staff Performance	Cases assigned and completed per staff member, and average days to finish
Removals	Removals done, how many became cases, cancellations, turnaround, pickup areas
Compliance	Operating licence details and expiry, and temperature log coverage and alerts

Each tab opens with four figures across the top, then charts and tables. Most chart tiles can be pressed to open a side panel with the full breakdown behind the picture. On the Overview tab there is also an **AI Summary** panel with a **Generate AI Summary** button.



Reports & Exports on the Overview tab with the date range picker, the eight tabs, the Export menu and the summary tiles

WHAT YOU CAN DO HERE

To produce a monthly report for your owner or your board:

- 1 Open the date range picker and choose **Last month**.
- 2 Press the tab you need — usually **Financial**.
- 3 Check the four figures at the top read as you expect.
- 4 Press **Export** and choose **PDF report**.

To get the numbers into a spreadsheet:

- 1 Set the date range and open the tab you want.
- 2 Press **Export** and choose **CSV spreadsheet**.

To find cases that have been sitting too long:

- 1 Open the **Activity** tab.
- 2 Look at the two tiles counting cases open longer than 30 days and bodies held longer than 14 days.
- 3 Press a tile to open the list behind it, oldest first.

To check your licence and your temperature records before an inspection:

- 1 Open the **Compliance** tab.
- 2 Read **Operating licence** — the licence number, the issuing authority and the expiry.
- 3 Read **Temperature log coverage** — how complete your logs are and how many alerts there were.
- 4 Press **Open storage units** to go and fix any gaps.

Good to know

- Every figure on this page follows the date range at the top. If a number looks wrong, check the range first.
- **Export** always exports the tab you are looking at, for the range you have set. The button stays greyed out until the page has finished loading.
- On the Financial tab, **Invoiced** is the value of invoices you issued and **Collected** is money you actually received. They will not match, and that is normal.
- On the Services tab, service value is what your price list says those services are worth. It is not the same as invoiced revenue, so do not add the two together.
- **Active workflow states** counts work sitting in each state right now. It does not follow the date range in the way the other figures do.
- The **AI Summary** panel only appears when AI reports are switched on for your facility. It writes a short plain-language summary of the figures on the page. Read it before you pass it on.
- If a note says part of the page could not load, try a narrower date range before you raise a ticket.
- The "open longer than" and "in storage longer than" limits are shown in the tile titles, so you always know what is being counted.

10.5 Client Report

WHAT THIS SCREEN IS FOR

one client's whole history in a single document: every case, what was billed, what was paid and what is still owed.

HOW TO GET HERE

Sidebar → Reports & Support → Reports → **Client Report**.

WHAT YOU SEE ON THE SCREEN

The title **Client Report** with the line "Detailed case and financial summary for a selected client", an **All Reports** button back to the main reports screen, and — once a client with cases is chosen — **Export Excel** and **Export PDF** buttons.

A **Report Filters** panel with a **Client** search box, **Date From**, **Date To** and a **Case Status** list (All statuses, Intake, Preparation, Service, Discharged).

Until you choose a client, the page invites you to search for one.

Once you do, you see:

- **Client Information** — name, type, when they were registered, phone, email, address, region and district, and their identity document.
- Six figures: **Total Cases**, **Active**, **Discharged**, **Total Billed**, **Total Paid** and **Balance Due**, with Balance Due marked outstanding or settled.
- **Case Details** — a table of every case with its number, the deceased's name, when it was admitted, its status, its storage place, the staff member on it, and the amounts billed, paid and owing. A totals row closes the table.

The screenshot displays the 'Client Report' interface. At the top, there's a navigation bar with 'Smith Funeral Home' and a search bar. The sidebar on the left shows 'REPORTS & SUPPORT' with 'Reports' selected. The main content area has a header 'Client Report' with a subtitle 'Detailed case and financial summary for a selected client'. Below this is a 'REPORT FILTERS' section containing a 'Client' search box, 'Date From' and 'Date To' date pickers, and a 'Case Status' dropdown menu. The main body of the report is currently empty, showing a prompt to 'Select a client to generate the report'. A 'View licence status' button is located in the top right corner of the main content area. The bottom of the screen shows a login status for 'demo@sankorra.com' and a 'Sign out' button.

Client Report with a client chosen, the six summary figures and the case details table with its totals row

WHAT YOU CAN DO HERE

To produce a statement for an institutional client such as a hospital:

- 1** Search for the client in the **Client** box and pick them.
- 2** Set **Date From** and **Date To** to the period you are billing.
- 3** Leave **Case Status** on **All statuses**.
- 4** Check the **Balance Due** figure.
- 5** Press **Export PDF** to send it to them, or **Export Excel** to work on it.

To see only cases you have finished with:

- 1** Choose the client.
- 2** Set **Case Status** to **Discharged**.

Good to know

- The export buttons only appear once you have chosen a client who has at least one case in the range.
- Case numbers in the table are links. Press one to open that case.
- **Total Billed**, **Total Paid** and **Balance Due** add up the cases shown, so they follow the date and status filters.

10.6 Support

WHAT THIS SCREEN IS FOR

getting help: reading the guides, looking up a word you do not know, raising a ticket, letting support see your screen, and checking whether Sankorra itself is having trouble.

HOW TO GET HERE

Sidebar → Reports & Support → Support.

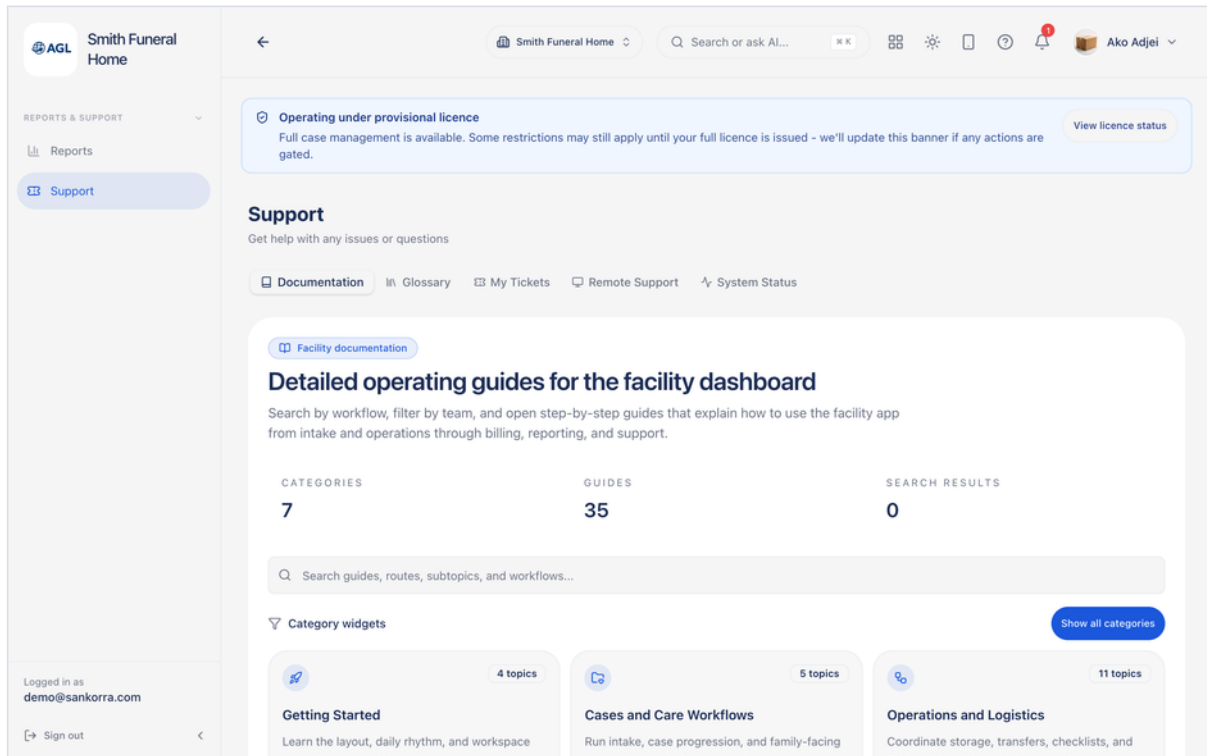
WHAT YOU SEE ON THE SCREEN

The title **Support** with the line "Get help with any issues or questions", then five tabs:

- **Documentation** — the built-in guides, grouped by subject, with search.
- **Glossary** — every Sankorra word explained, with links through to the guide that covers it.
- **My Tickets** — your facility's support tickets.
- **Remote Support** — lets a support agent see your screen while you are on the phone to them.
- **System Status** — whether Sankorra's own services are running normally.

On **My Tickets** you get a search box, a **New Ticket** button, a row of status buttons with counts (All, Open, In Progress, Awaiting Reply, Resolved, Closed), a row of category buttons (All, Billing, Technical, Feature Request, Bug Report, General), and then one panel per ticket showing its number, an Urgent or High Priority mark, the subject, the category, the date, who raised it and the status.

Pressing a ticket opens it: the subject and status at the top, a **Close Ticket** button, a **Ticket Details** panel with the priority, category and description, a **Messages** panel with the whole conversation and a box to type your reply, an **Attachments** panel, and your rating once you have given one.

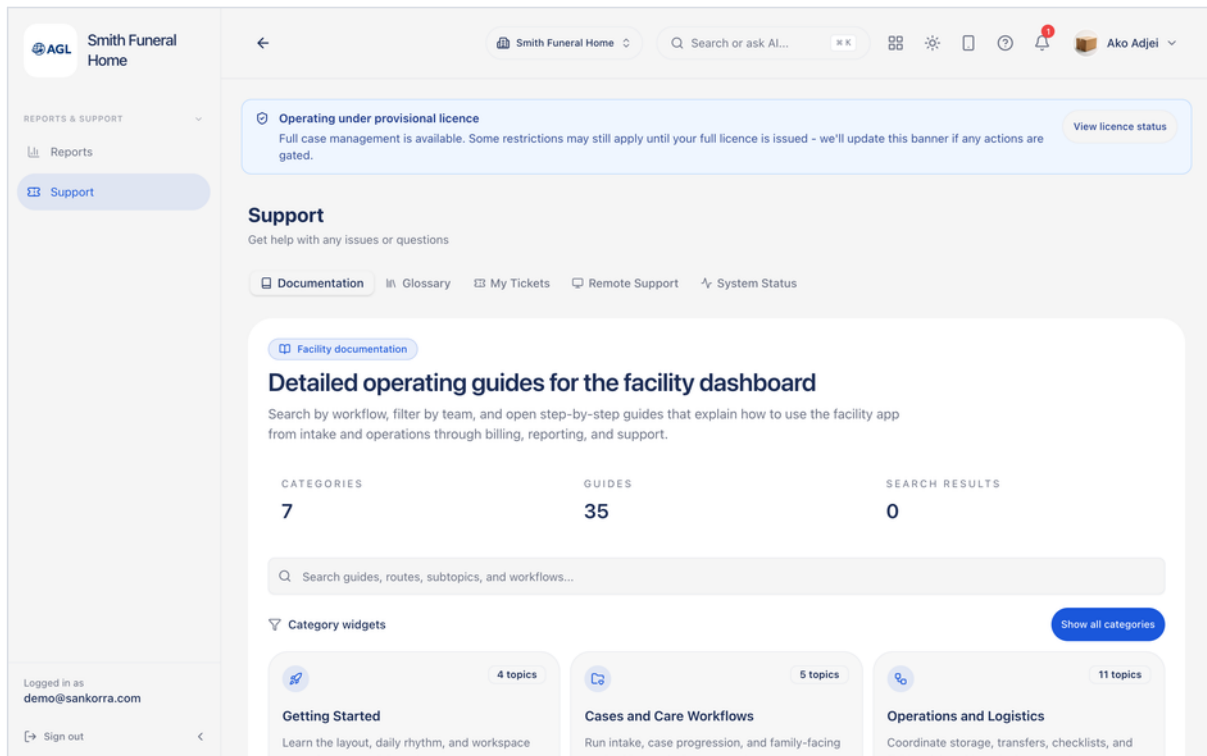


The Support screen on the My Tickets tab, showing the status and category filter buttons and several tickets with their status badges

WHAT YOU CAN DO HERE

To raise a support ticket:

- 1 Open the **My Tickets** tab.
- 2 Press **New Ticket**.
- 3 Pick a template that matches your problem, or carry on without one.
- 4 Check or type the **Subject**.
- 5 Describe the problem in the description box. Ten characters is the minimum, but the more you say, the faster you will be helped: what you were doing, what you expected, what happened instead, and the case or invoice number.
- 6 Choose the **Category** — Billing, Technical, Feature Request, Bug Report or General.
- 7 Choose the **Priority** — Low, Medium, High or Urgent.
- 8 Press the button to create the ticket.



The Create Support Ticket window with the subject, description, category and priority filled in

To carry on a conversation about a ticket:

- 1 Open the **My Tickets** tab and press the ticket.
- 2 Read the **Messages** panel. Your own messages sit on the right, the support team's on the left.
- 3 Type into the box at the bottom and press the send button.
- 4 Add any screenshot or document in the **Attachments** panel.

To close a ticket you no longer need:

- 1 Open the ticket.
- 2 Press **Close Ticket**.
- 3 Rate the help you got when the rating window appears.

To use live chat:

- 1 Press the round chat button in the bottom-right corner of any screen.
- 2 You start off talking to Kofi, Sankorra's assistant. Type your question and press send. Kofi knows which screen you are on and may point you at the right guide.
- 3 If you need a person, press **Talk to a human** at the bottom of the panel.
- 4 A banner tells you that you are in the queue and an agent will pick it up shortly. Your conversation with Kofi is passed on, so you do not have to explain twice.
- 5 Press **Back to Kofi** to go back to the assistant without ending the live chat, or **End chat** when you are finished.

To let support see your screen:

- 1 Open the **Remote Support** tab.
- 2 Read the privacy notice. Screen sharing captures your whole screen or one window, so close anything you would not want the agent to see.
- 3 Press **Generate Session Code**.
- 4 Read the code out to the agent on the phone, or press the copy button and send it.
- 5 Watch **Remote Control: View Only** means the agent can see but not touch; **Control Enabled** means they can move your mouse and type. Press **Revoke Control** to take that back at any moment.
- 6 Press **End Session** when you are done.

To check whether the problem is yours or Sankorra's:

- 1 Open the **System Status** tab.
- 2 Read the overall status and the list of services.

Good to know

Here is what each ticket status means:

Status	What it means
Open	Raised and waiting to be picked up.
In Progress	Support is working on it.
Awaiting Reply	Support is waiting on something from you.
Resolved	Support believes it is fixed.
Closed	Finished.

- A ticket marked **Awaiting Reply** is waiting on *you*. Open it and answer, or it will sit there.
- Once a ticket is closed you can no longer add messages or attachments.
- You are asked to rate a ticket once it is resolved or closed. The rating helps support improve; it does not reopen the ticket.
- Try the **Documentation** and **Glossary** tabs before raising a ticket. Most questions about what a status means or why a button is greyed out are answered there.
- Kofi is an assistant, not a person. It can answer questions about your own facility's figures and point you at guides, but only a live chat or a ticket reaches a human.
- A remote support session is under your control from start to finish. Nobody can see your screen until you give out the code, nobody can control your mouse and keyboard unless you allow it, and you can revoke control or end the session whenever you like.
- If **System Status** shows a problem with a Sankorra service, you do not need to raise a ticket about it. Wait for it to clear.

CHAPTER 11

Administration

This chapter and the next one are written for the **owner or administrator** of the facility, not for front-line staff. Everything described here changes how the system behaves for your whole team, so the two menu groups it covers — **ADMINISTRATION** and **CONFIGURATION** — only appear in the sidebar when your role is Owner or Admin. If a colleague tells you they cannot see these menus, that is why.

Finding the menus. By default the sidebar shows only the group of links that belongs to the page you are on. To see every group at once, press the squares button in the top bar (its tooltip reads "Browse sidebar categories") and switch **Show all sections** on. Under it, the message reads "Off: sidebar focuses just the section you're in." Your choice is remembered.

If you open one of these addresses directly and you are not an owner or admin, some pages show a panel headed **Access Restricted** that names the page and says it "is available to facility **owners** and **administrators** only." Others will simply fail to save. Either way, ask the facility owner.

11.1 Staff

WHAT THIS SCREEN IS FOR

the list of everybody who works at your facility: staff with a login to this dashboard, and licensed practitioners attached to your register. This is also where you invite a new team member.

HOW TO GET HERE

Sidebar → ADMINISTRATION → Staff.

WHAT YOU SEE ON THE SCREEN

At the top, the heading **Team Members** with the line "Manage staff, practitioners and access permissions", and on the right a blue **Invite Member** button.

Below that, a band of six counts:

Count	What it means
Total Staff	Everyone on the list, staff and practitioners together
Online now	People whose screen has been active in the last two minutes
Enabled	People whose access has not been suspended
Admins	Owners and admins added together
Suspended	People whose access you have switched off
Pending Invites	Invitations sent but not yet accepted

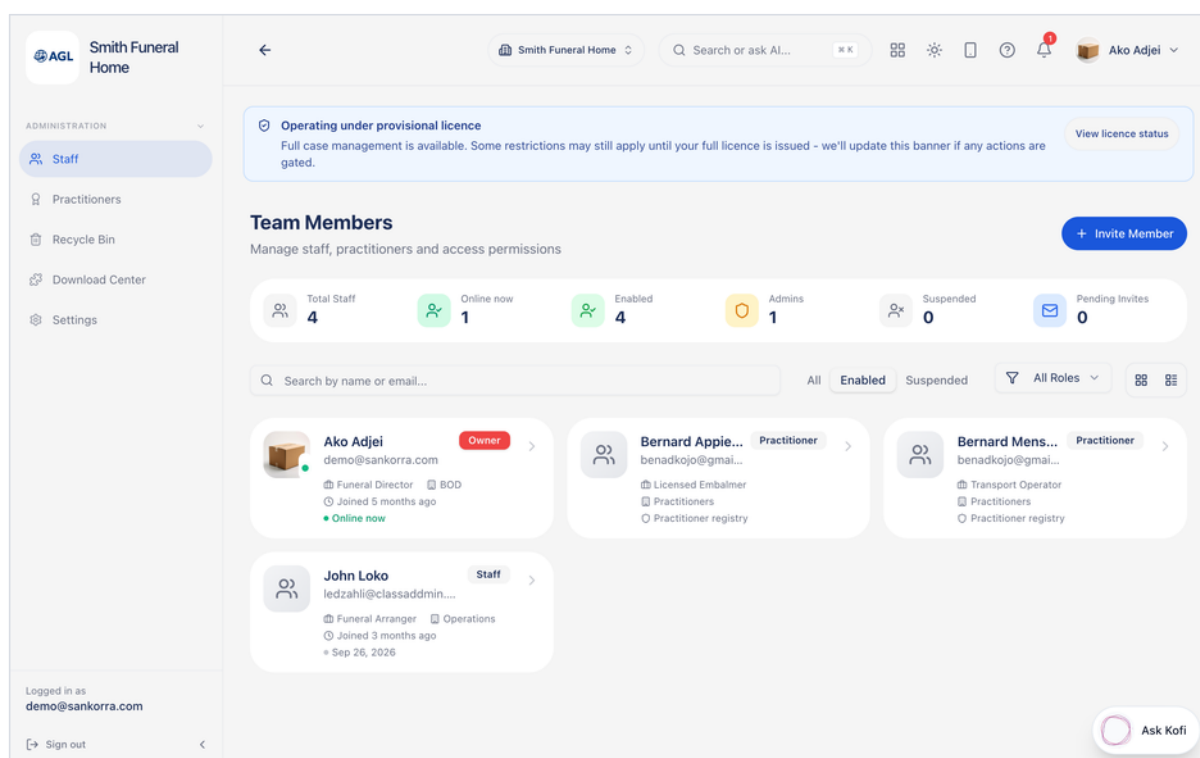
If there are invitations waiting, a yellow panel headed **Pending Invitations** appears next, with the line "*N* invitations awaiting response". You can collapse it with the arrow on its right.

Then the controls: a search box reading "Search by name or email...", three tabs **All**, **Enabled** and **Suspended**, a role filter (All Roles, Owner, Admin, Manager, Staff, Viewer) and two small buttons that switch between card view and list view.

Finally the people themselves. Each card shows the person's photo or a figure icon, their name, their email, a coloured badge with their role, and under that their job title, department, when they joined and when they were last active. A green dot means they are online now. A suspended person's card is faded with a crossed-out figure on the photo.

Practitioners appear on the same list. Their badge reads **Practitioner**, or **In charge / Lead** if they are the lead practitioner, and instead of "last active" they show "Practitioner registry".

In list view the columns are Name, Role, Job Title, Department and Joined.



Team Members page in card view with the six counts, the Pending Invitations panel open, and several staff cards showing different role badges

WHAT YOU CAN DO HERE

To invite a new team member:

- 1 Press **Invite Member**.
- 2 Type their email address in **Email Address** (this is required).
- 3 Choose a **Role** from the list. The list shows every role your facility has, including any custom role you have built, each with a one-line description underneath. Owner is not offered here.
- 4 Optionally type a **Job Title**, for example "Funeral Director".
- 5 Optionally type a **Department**, for example "Operations".
- 6 Press **Send Invitation**.

To open somebody's page:

- 1 Press anywhere on their card or row. Staff open on their own page; practitioners open on their practitioner form instead.

To resend, copy or cancel an invitation:

- 1 Find the person in the **Pending Invitations** panel.
- 2 Press the three-dot button at the end of their row.
- 3 Choose **Copy Invite Link** to put the joining link on your clipboard, **Renew 7 Days** to give them another seven days and send the email again, or **Cancel Invitation** to withdraw it.
- 4 If you chose Cancel, confirm on the dialog headed **Cancel Invitation**.

Good to know

- **Enabled is not the same as online.** "Enabled" means you have not suspended the person. "Online now" means their screen was active in the last two minutes.
- After you press **Send Invitation** the system tells you exactly what happened, and it is not always the same thing:
- If the email address is new, an invitation is created and emailed, and the message says they have **7 days to accept**.
- If the email address already has a Sankorra account, the person is added to your team **straight away** — there is nothing for them to accept. The message says so and tells you whether an email went out.
- If the email could not be sent, the screen shows a **Join Link** with a **Copy Link** button. Copy it and send it to them yourself by WhatsApp or text. The invitation is still valid.
- You cannot invite somebody twice. If the email already belongs to a team member, a red panel appears and **Send Invitation** stays greyed out; it tells you their current role and to change it from their own page instead. If they already have an invitation waiting, a yellow panel appears with the dates.
- **Renew 7 Days** both extends the invitation and sends the email again — it is the "resend" action.
- Only owners and admins see the **Invite Member** button.
- If your plan or facility does not include the staff module, this menu item does not appear at all.

11.2 A team member's page

WHAT THIS SCREEN IS FOR

everything about one member of staff: their contact details, their role, what they are allowed to do, what they have been doing, and the controls to suspend or remove them.

HOW TO GET HERE

Sidebar → ADMINISTRATION → Staff, then press the person.

WHAT YOU SEE ON THE SCREEN

Down the left is a card with their initials or photo, their name, their role badge, their staff ID if they have one, then **Email** and **Phone** (each with a copy button), the date they joined, and "Last active:" with a coloured dot.

Under it, a card headed **Action Center** with the line "Direct controls and quick jumps for reviewing this staff record." It holds **Edit Staff Details** and **Suspend Access** (or **Restore Access** if they are already suspended). If you are not allowed to edit this person, a dashed box appears instead reading "You can review this profile, but editing is limited to owners and eligible admins."

Below that, when you are allowed to use it, a red-edged card headed **Danger Zone** with the line "Removing a team member revokes facility access and removes them from active staffing", and one button: **Remove From Team**.

On the right are four tabs:

- **Access** — "Operational access". Shows the role baseline, how many permissions are in effect, how many modules they can reach, and any exceptions. Further down, **Module coverage** and **Override details**, which lists any extra permissions granted to this person ("No additional grants" when there are none) and any taken away ("No explicit restrictions").
- **Permissions** — "Permission map". The same access grouped module by module for a quick read.
- **Activity** — "Audit timeline". The latest recorded actions tied to this person. Only owners and admins can see it; everybody else gets "Activity review is limited to owners and admins."
- **Employment** — "Directory and team placement": Display Name, Staff ID, Email, Phone, Role, Job Title, Department, Joined, Last profile update and Access state.

The screenshot displays the Sankorra Facility Dashboard interface. On the left is a sidebar with 'ADMINISTRATION' and 'Staff' selected. The top header shows 'Smith Funeral Home' and a search bar. The main content area is titled 'Ako Adjei' under 'STAFF OPERATIONS'. It features a staff profile card with a photo placeholder, name, role ('Funeral Director - BOD'), ID ('SFH-001'), email ('demo@sankorra.com'), and phone ('0244787515'). The card also shows 'Joined May 16, 2026 - 5 months ago' and 'Last active: Online now'. To the right of the card are four tabs: 'Access' (selected), 'Permissions', 'Activity', and 'Employment'. The 'Access' tab shows an 'ACCESS SUMMARY' section with 'Operational access' details. It includes four metrics: 'ROLE BASELINE' (Owner), 'EFFECTIVE PERMISSIONS' (65), 'MODULE COVERAGE' (5/5), and 'EXCEPTIONS' (0). Below these are 'Module coverage' and 'Override details' sections. The 'Module coverage' section shows 'Coverage bars show how much of each operational area is enabled.' and the 'Override details' section shows 'Explicit grants and blocks beyond the assigned role.' with an 'Ask Kofi' button.

A staff member's page on the Access tab, showing the left card, Action Center, Danger Zone and the access summary

WHAT YOU CAN DO HERE

To change somebody's role, job title, department or phone:

1 Press **Edit Staff Details**.

- 2** On the dialog headed **Edit Staff Member**, choose the new **Role**.
- 3** Change **Job Title**, **Department** or **Phone** if you need to.
- 4** Save the dialog.

To suspend somebody's access:

- 1** Press **Suspend Access**.
- 2** Read the dialog headed **Suspend Staff Member** — it warns that "They will lose access to the system until restored."
- 3** Press **Suspend**.

To give access back:

- 1** Press **Restore Access**, then **Restore**.

To remove somebody from the team:

- 1** Press **Remove From Team** in the Danger Zone.
- 2** Read the dialog headed **Remove Staff Member**. It says "This action cannot be undone."
- 3** Press **Remove**.

Good to know

- You cannot suspend or remove **yourself**, and you cannot suspend or remove the **Owner** unless you are the owner.
- An admin cannot edit the owner's details. Only the owner can hand out the Owner role.
- Suspending is the reversible option; removing is not. If somebody is going on leave, suspend them. Only remove somebody who has actually left.
- Removing a person does **not** put them in the Recycle Bin — see 11.5.
- A person's role only sets the *baseline*. What they can actually do is the role plus any exceptions shown on the Access tab. To change what a whole role can do, see 12.2.

11.3 Practitioners

WHAT THIS SCREEN IS FOR

the register of licensed practitioners attached to your facility: funeral directors, embalmers, mortuary attendants and so on. The regulator owns the licences; you keep the list of who works with you.

HOW TO GET HERE

Sidebar → ADMINISTRATION → Practitioners.

WHAT YOU SEE ON THE SCREEN

At the top, the heading **Practitioners** with the line "Licensed practitioners affiliated with your facility", and on the right two buttons: **Find existing** and **Register Practitioner**.

Under that, four counts: **Total**, **Active License**, **Pending** and **Expired**.

Then a search box reading "Search by name or registration number...", four tabs **All**, **Active**, **Pending** and **Expired**, a type filter (All Types, Funeral Director, Licensed Embalmer, Mortuary Attendant, Crematorium Operator, Transport Operator, Cemetery Manager) and the card/list view buttons.

Each practitioner card shows their full name, their practitioner type, a badge reading **In charge** / **Lead** or **General**, their registration number, phone and email, and a licence badge on the right.

Licence badge	What it means
Active	The licence is in force
Pending	Submitted, the regulator has not decided yet
Approved	The regulator has approved the submission
Verified	The regulator has verified the details
Expired	The licence has run out
Suspended	The regulator has suspended the licence
Revoked	The regulator has withdrawn the licence
Inactive	Not currently in use

At the bottom left of each card you will see either **Has dashboard access** in green, a **Give dashboard access** button, or the grey note "No email to invite". On the right of each card is **Edit**.

The screenshot displays the Sankorra Facility Dashboard interface. On the left is a sidebar with navigation options: ADMINISTRATION, Staff, Practitioners (selected), Recycle Bin, Download Center, and Settings. The main content area features a top navigation bar with the Sankorra logo, a search bar, and user profile information (Ako Adjei). Below the navigation bar is a banner indicating the facility is 'Operating under provisional licence'. The 'Practitioners' section shows a summary of practitioner counts: Total (3), Active License (2), Pending (0), and Expired (0). A search bar and filters (All, Active, Pending, Expired) are provided. The practitioners are listed in card view, showing details for Bernard Appiedu (Inactive), Bernard Mensah (Active), and Otoo Addo (Active). Each card includes the practitioner's name, title, type (General), contact information, and a 'Give dashboard access' button. The bottom of the dashboard shows the user is logged in as 'demo@sankorra.com' and has a 'Sign out' button.

Practitioners list in card view with the four counts and cards showing different licence badges and the "Give dashboard access" button

WHAT YOU CAN DO HERE

To add a practitioner who is already on the regulator's register:

- 1 Press **Find existing**.
- 2 On the dialog headed **Find an existing practitioner**, type their **License number** (for example LIC-2026-04217).
- 3 Press the search button beside the box.
- 4 Read the card that appears. It shows their name, type, registration and licence number, licence status, and the dates it was **Issued** and **Expires**. It also tells you either "No current facility affiliation. Adding will register them at your facility" or "Currently affiliated with *another facility*. Adding to your facility will transfer the affiliation."
- 5 Press **Add to my facility**.

If nothing is found you see a yellow note: "No match. No practitioner is registered with that license number. Double-check the number, or register a new practitioner instead."

To register a practitioner who is not on the register yet:

- 1 Press **Register Practitioner** and follow 11.4.

To give a practitioner a login to this dashboard:

- 1 Press **Give dashboard access** on their card.
- 2 The invitation dialog opens already filled in with the email on their practitioner record and their practitioner type as the job title.
- 3 Choose a **Role** and press **Send Invitation**.

Good to know

- **Being on your practitioner register does not give anybody a login.** The two things are separate. A practitioner only gets into this dashboard when you invite them, which is what **Give dashboard access** does.
- The invitation must go to the email on the practitioner record, because that is the account the practitioner portal knows them by. If there is no email on the record, the card reads "No email to invite" — edit the practitioner and add one first.
- Only owners and admins see **Give dashboard access**.
- The **Active License**, **Pending** and **Expired** counts only count those three statuses, so they will not always add up to **Total**.

11.4 Registering or editing a practitioner

WHAT THIS SCREEN IS FOR

submitting a practitioner's details to the regulator, and keeping them up to date afterwards.

HOW TO GET HERE

Sidebar → ADMINISTRATION → Practitioners, then **Register Practitioner**, or **Edit** on a practitioner's card.

WHAT YOU SEE ON THE SCREEN

The heading reads **Register Practitioner** when you are adding somebody and **Edit Practitioner Submission** when you are changing one. Under it: "Facilities can submit practitioner details. Regulator review is still required before approval or verification."

The form is in three cards.

Personal Information — First Name (required), Middle Name, Last Name (required), Date of Birth, Gender (Male, Female, Other), Nationality (starts as Ghanaian), National ID, **Origin (for fee rates)** with the choices *Local (Ghanaian)* and *Foreign* and the note "Determines which MoFFA practitioner fee rate applies", Phone Number, Email, Address (which suggests addresses as you type) and City / Town.

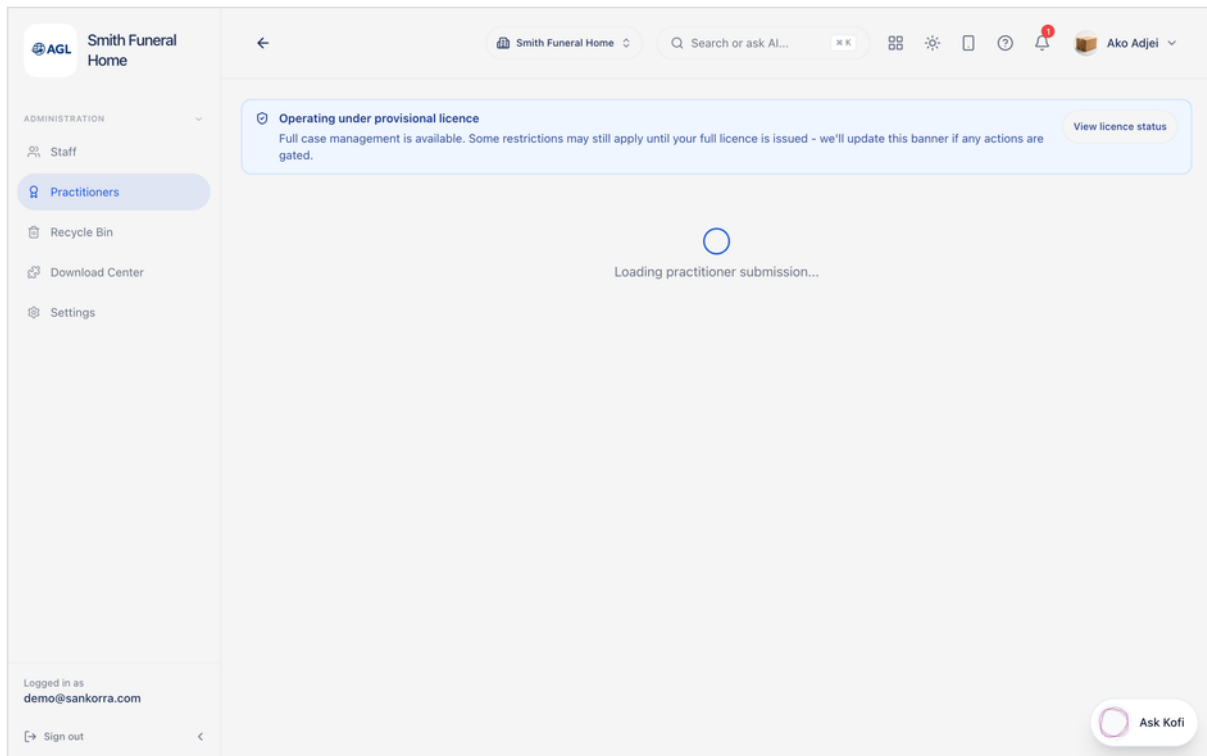
Professional Information — Practitioner Type (required) and Years of Experience.

Facility Affiliation — Facility Name (fixed to your facility, you cannot change it), Regulatory Region (fixed, showing "Set by the regulator" until the regulator sets one), Employment Type at this facility (Full Time, Part Time, Contract, Self Employed, Unemployed), Employment Start Date, **Status at this facility** (*General practitioner* or *In-charge / Lead*) with the note "A practitioner can be in charge at only one facility at a time", **Regulator review status** (read only) and **Notes for Regulator**.

At the bottom of that card, once the practitioner exists, a line reading "If this practitioner has left, end the affiliation so they stop appearing on your register", with an **End affiliation** button.

At the very bottom, **Cancel** and either **Submit for Review** (new) or **Save Submission** (existing).

When you are editing, a further card appears below the form for qualifications. It lets you add a Type, **Title**, Institution, Country, Issue date, Expiry date and a **Supporting document (optional)**, then press **Add qualification**. Qualifications the regulator has checked are marked **Verified**.



The practitioner form showing all three cards and the qualifications section below

WHAT YOU CAN DO HERE

To register a practitioner:

- 1 Fill in at least **First Name**, **Last Name** and **Practitioner Type**.
- 2 Press **Submit for Review**.
- 3 The page stays open and turns into the edit form, so you can add qualifications straight away.

To add a qualification:

- 1 Scroll to the qualifications card.
- 2 Choose a **Type** and type a **Title**, for example "Diploma in Mortuary Science".
- 3 Fill in Institution, Country and the dates if you have them.
- 4 Optionally choose a supporting document.
- 5 Press **Add qualification**.

To take a practitioner off your register:

- 1 Press **End affiliation**.
- 2 Read the dialog. It says they "will be removed from *your facility's* register, and this facility loses access to their record. Their licence and history are not affected, and the regulator can restore the link."
- 3 Press **End affiliation** again to confirm.

Good to know

- You **submit**, the regulator **decides**. A new practitioner starts at **Pending**. You cannot set the licence status, the registration number or the regulatory region yourself — those fields are read only.
- Some things you type may not be saved, because the facility is not allowed to change them. When that happens the screen tells you so in a message rather than quietly dropping them.
- **Date of Birth cannot be in the future.** If you paste a future date the save is refused with that message.
- A supporting document must be a PDF, DOC, DOCX, JPG, PNG or WEBP file, and **10MB or less**.
- Ending an affiliation is only available to Owner, Admin and Manager.
- Ending an affiliation is not a deletion — it unlinks them from you. It does not go to the Recycle Bin, and only the regulator can put the link back.
- If you press Edit on a practitioner who is no longer attached to your facility, you get a page headed **Practitioner not available** instead of a blank form.

11.5 Recycle Bin

WHAT THIS SCREEN IS FOR

a safety net. When somebody deletes certain things, they are not destroyed straight away: they come here, where you can put them back or get rid of them for good.

HOW TO GET HERE

Sidebar → ADMINISTRATION → Recycle Bin.

WHAT YOU SEE ON THE SCREEN

The heading **Recycle Bin**, with the line "Items deleted from anywhere in the facility live here until the platform retention period elapses. Admins and owners can restore or permanently delete them sooner."

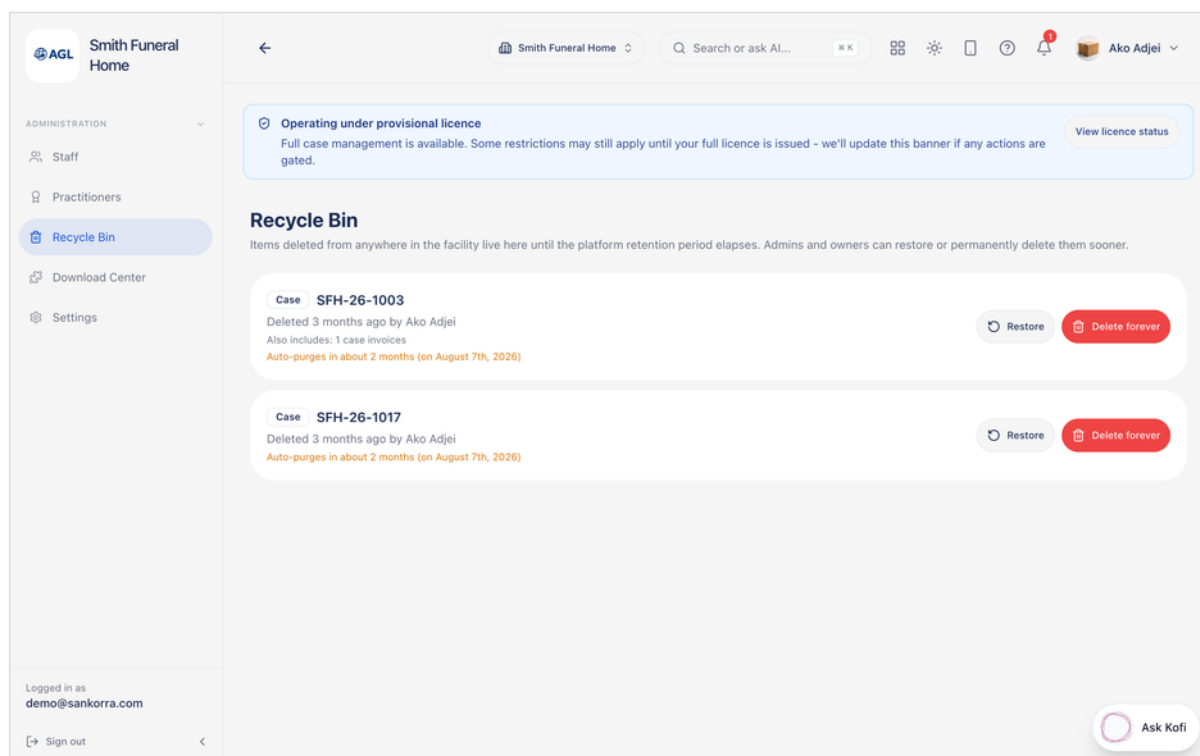
Then one card per deleted item. Each card shows a grey badge naming the kind of thing it is (Case, Invoice, Document, Client, Cemetery Section, Cemetery Plot, Inquiry or Quote), the item's own reference — a case number, invoice number, client name, plot number and so on — and under it "Deleted *two days ago* by *Ama Mensah*".

If other items were swept up with it, a grey line reads "Also includes: 3 case invoices · 2 case documents".

In amber, the deadline: "Auto-purges in *27 days* (on *12 April 2026*)".

On the right of each card, two buttons: **Restore** and **Delete forever**.

When the bin is empty you see "Recycle bin is empty" with the line "Anything you delete (cases, invoices, documents, etc.) will appear here so you can recover it before the retention period elapses."



Recycle Bin with several cards showing the type badge, who deleted it, the "Also includes" line and the amber auto-purge deadline

WHAT YOU CAN DO HERE

To bring something back:

- 1 Find its card and press **Restore**.
- 2 A dialog asks "Restore this case?" and says that the item "and everything that was cascade-deleted with it will be brought back."
- 3 Press **Restore**.
- 4 The item reappears wherever it normally lives.

To destroy something now, without waiting:

- 1 Find its card and press **Delete forever**.
- 2 A dialog asks "Permanently delete this case?" and warns: "This cannot be undone. *The item* and everything cascade-deleted with it will be removed from the database immediately."
- 3 Press **Delete permanently**.

Good to know — read this before you delete anything

This is the part that causes the most support calls, so it is worth being blunt.

Only these can be recovered. When one of these is deleted, it goes to the Recycle Bin and you have a limited time to change your mind:

Comes to the Recycle Bin

Shown as

A case, with its invoices and documents

Case

Comes to the Recycle Bin	Shown as
An invoice on a case	Invoice
A document on a case	Document
A client	Client
A cemetery section	Cemetery Section
A cemetery plot	Cemetery Plot
A storefront enquiry	Inquiry
A quote	Quote

Everything else is gone the moment you confirm. Deleting any of the following does **not** put it in the Recycle Bin and there is no way to get it back from inside Sankorra:

- Staff and team members — **Remove From Team** is permanent.
- Practitioners and their qualifications.
- Services, service categories, client types and their pricing rules.
- Case service types, case priorities and burial types.
- Rate schedules and public rate cards.
- Packages and price tiers.
- Workflows, and the forms you have built.
- Maintenance form fields, equipment and maintenance records.
- Payment providers, including the keys stored with them.
- Chapel, fleet and support records.
- Anything imported through Data Import.

For several of those the confirmation dialog says "This action cannot be undone" — believe it. Where a screen offers you the choice of **hiding** something instead of deleting it (most of the dropdown lists do), hide it. Hiding takes it off the dropdown for new work without touching anything that already uses it.

Other things worth knowing:

- The countdown is set by Sankorra, not by you. It is normally **30 days** from the day of deletion. Once it runs out the item is destroyed automatically, whether or not you have looked at it.
- **Restore brings back the whole bundle.** Restoring a case also restores the invoices and documents that went with it. You cannot restore only part of a bundle.
- Only **owners and admins** can see or use this screen, and you only ever see items deleted from your own facility.
- Restoring a case does not undo anything that happened after the deletion — for example, a storage compartment that has since been given to somebody else.

- **Delete forever** is exactly that. It skips the countdown and destroys the item and everything bundled with it immediately. Only use it when you are certain, for example when a family has asked you to erase their records.

11.6 Download Center

WHAT THIS SCREEN IS FOR

switching whole features of Sankorra on and off for your facility, the way you would install or remove an app on a phone. Turning one off hides its menus and its screens for everybody.

HOW TO GET HERE

Sidebar → ADMINISTRATION → Download Center, or Settings → Download Center.

WHAT YOU SEE ON THE SCREEN

The heading **Download Center** with the line "Browse and install features for your facility. **4 of 12** installed."

Below it, category tabs, each with a small counter showing how many of that category you have installed: **Attendance**, **Operations**, **Sales**, **Inventory** and **Partners**. The counter turns green when they are all installed.

Inside each tab, a grid of square tiles. Each tile has a large coloured icon, the feature's name, its category underneath, and a button at the bottom. An installed tile is tinted green, has a green tick on the corner of its icon, and its button reads **Uninstall**. A tile you do not have reads **Install**.

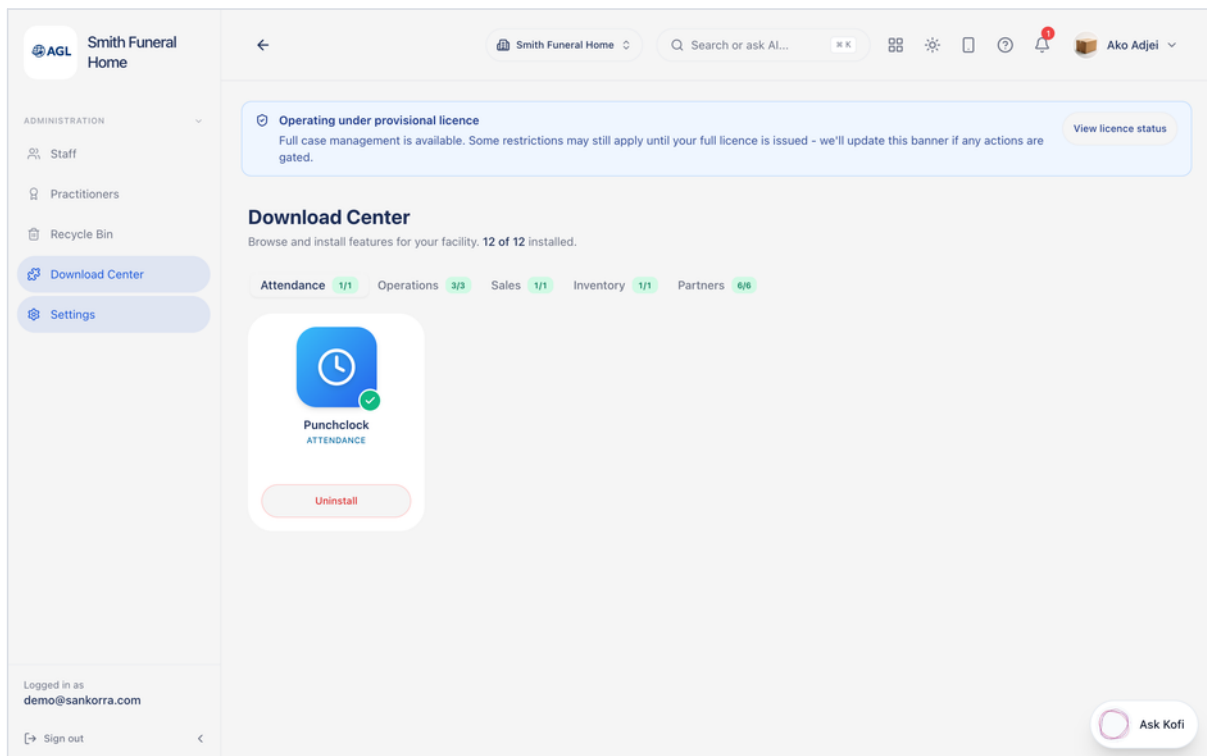
Two other states appear as a small badge above the button:

- **Plan upgrade** — your subscription does not include this feature. The button changes to **Upgrade** and takes you to the billing page.
- **Needs Partners** — this is one of the Partners features and the Partners hub itself is switched off. The button is greyed out.

The features are:

Feature	What it gives you
Punchclock	Staff attendance, clock in and out, overtime alerts, punch reports
Facility Maintenance	Log and track maintenance work orders
Workflow	Approvals, SLA monitor and workflow analytics
Form Builder	Design your own intake, case and inspection forms
Storefront	Your public shop and the enquiry inbox
Inventory	Caskets, urns, supplies and stock movements
Partners (Interop)	The hub for the five features below
Inbound Transfer Portal	Hospital to mortuary handover through the partner portal

Feature	What it gives you
Incident Reports	Log operational incidents and safety events
Post-mortem Records	Capture and sign off post-mortem examinations
Regulator Clearances	Request and track clearance sign-offs
Evidence Holds	Flag cases as under evidence hold



Download Center on the Partners tab, showing installed tiles with green ticks and one tile carrying the "Needs Partners" badge

WHAT YOU CAN DO HERE

To install a feature:

- 1 Open the tab it lives in.
- 2 Press **Install** on its tile. The icon spins for a moment and the button becomes **Uninstall**.

To install the Partners hub:

- 1 Press **Install** on **Partners (Interop)**.
- 2 A dialog appears headed "Install Partners (Interop)?" listing everything it will also switch on, and noting "You can turn any of these off individually after enabling the hub."
- 3 Press **Install**.

To uninstall a feature:

- 1 Press **Uninstall** on its tile.
- 2 A dialog appears headed "Uninstall *feature*?" with the line "Existing data stays available — new writes to this module will be rejected until it's re-installed."

- 3 It then checks for work in progress. If it finds any, a red panel appears headed **Can't uninstall yet** with the reasons listed, and the line "Resolve the items above (or archive them) and try again." The Uninstall button stays greyed out.
- 4 If you are uninstalling the Partners hub, a tick box appears: "Uninstall all 5 child features." Leave it ticked to turn them all off, or clear it to leave them on.
- 5 Press **Uninstall**.

Good to know

- This screen is **owner and admin only**. Anybody else sees the **Access Restricted** panel, because installing a feature reshapes the sidebar for everybody at the facility.
- **Uninstalling does not delete anything**. Your records stay in the database and stay readable. What stops is *new* work: the menus disappear and the system refuses new entries for that feature. Re-installing brings everything straight back.
- Some features refuse to come off while work is outstanding. What blocks them: Punchclock (attendance recorded in the last 30 days), Facility Maintenance (open or in-progress work orders), Workflow (workflow instances still in progress), Storefront (new or in-progress enquiries to answer) and Inventory (any inventory items — archive or transfer them first).
- Turning off **Partners (Interop)** switches off all five features under it. While the hub is off, the five tiles show **Needs Partners** and cannot be installed on their own.
- Some features also need the right subscription — Workflow and Inventory are the two that show **Plan upgrade** when your plan does not include them.
- Turning off **Facility Maintenance** also freezes the Maintenance Forms builder (12.5). Turning off **Workflow** hides Workflows (12.3). Turning off **Form Builder** hides the Form Builder (12.4) but forms you have already published keep collecting information.
- Turning off **Storefront** shows visitors a holding page instead of your shop.

11.7 Settings

WHAT THIS SCREEN IS FOR

the front door to every setting in the system. It is a wall of tiles, each one leading to a screen covered later in this chapter.

HOW TO GET HERE

Sidebar → ADMINISTRATION → Settings.

WHAT YOU SEE ON THE SCREEN

The heading **Settings** with the line "Manage your account and facility settings", and on the right a pair of buttons marked **Grid** and **List** that change the tiles into rows. Your choice is remembered.

Under the heading, a card with your facility's name, your email address, and a badge showing your plan.

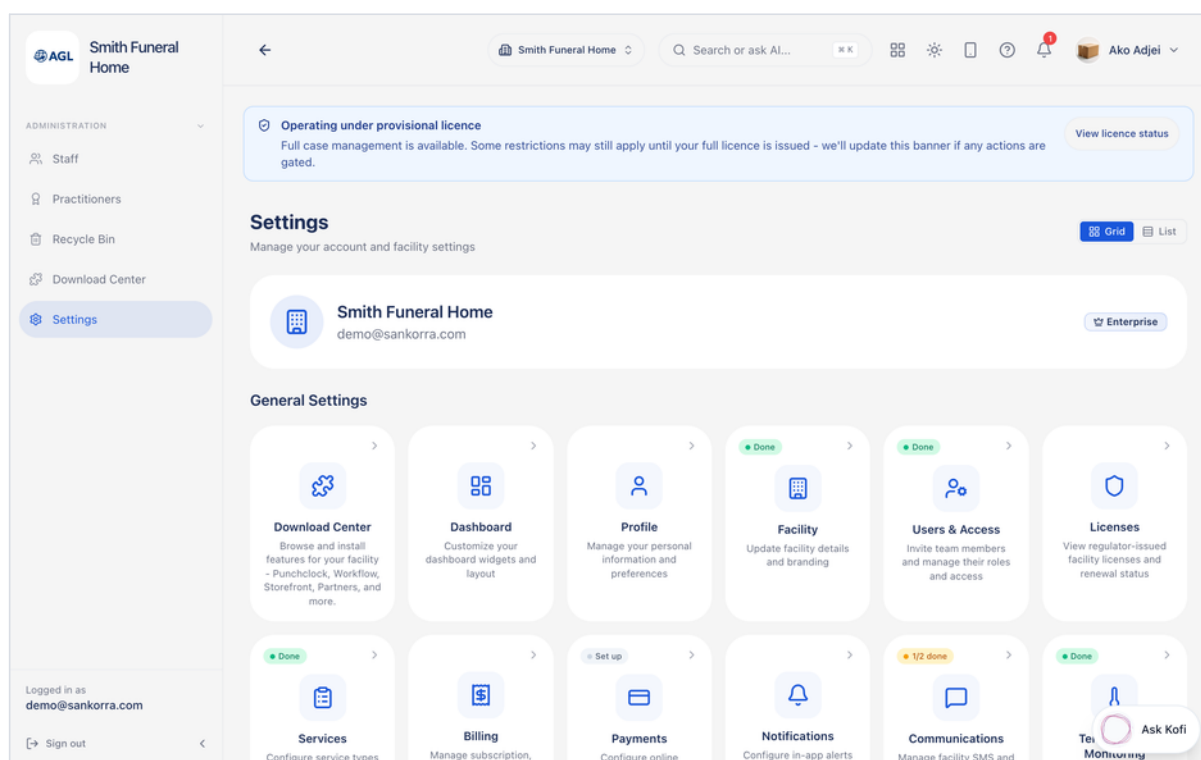
Then two groups of tiles.

General Settings — Download Center, Dashboard, Profile, Facility, Users & Access, Licenses, Services, Billing, Payments, Notifications, Communications, Temperature Monitoring, Inventory Alerts, Appearance, Case Transfers, Service Categories, Client Types, Case Service Types, Case Priorities, Burial Types, Storefront Categories, Data Import, Rate Schedules, Public Rates, Release Checklist, Embalming, Partners and Clearance Requirements.

Plan-based Features — Documents, AI Features, API Access, Integrations, Custom Domains and Login Page. Each of these carries a gold **Premium** badge.

At the bottom, a card headed **Security** with the line "Manage your password, two-factor authentication, and active sessions" and a **Manage** link.

Some tiles carry a small status chip in their top corner: **Done**, **Set up**, **In progress**, or a count like "2/3 done". That is Sankorra telling you how far you have got with setting that area up.



Settings page in grid view showing the facility card, the General Settings tiles with setup chips, and the Plan-based Features tiles with Premium badges and padlocks

WHAT YOU CAN DO HERE

To open a setting:

- 1 Press its tile.

To switch between tiles and rows:

- 1 Press **Grid** or **List** at the top right.

Good to know

- If you are not an owner or admin, opening Settings sends you straight to your own **Profile** instead.
- A tile in the **Plan-based Features** group with an amber padlock and the words "Upgrade to unlock" is not included in your subscription. Pressing it takes you to the billing page rather than the setting.
- The status chips are a guide to getting set up, not a warning. A tile reading **Set up** simply means you have not been there yet.

11.8 Facility details and branding

WHAT THIS SCREEN IS FOR

your facility's own record: its name, contact details, registration numbers, where it is, how case and invoice numbers are built, tax rates, your logo, and how long staff can sit idle before they are signed out.

HOW TO GET HERE

Settings → Facility.

WHAT YOU SEE ON THE SCREEN

The heading **Facility Settings** with the line "Manage your facility's configuration and preferences", and six tabs.

General — the card **General Information: Facility Name** (required), **Primary Facility Type**, **Email Address**, **Phone Number** and **Facility ID** (which you cannot change — it is "Used for API integrations and support requests"). Below it, **Active Facility Types** with your types shown as badges and a **Manage Types** button.

Regulatory — the card **Regulatory & Business Information** and a **View License Center** button. Three fields are greyed out because the regulator owns them: **License Number**, **License Expiry Date** and **License Issuing Authority**. You can edit **Tax ID (TIN)**, **Business Registration Number**, **Date Established** and **Website**.

Location — **Street Address** (which suggests addresses as you type), **Region**, **Town**, **Regulatory Zone**, **District** and **Country** (fixed). Under them a **Map pin** block with a **Pin from address** button, **Latitude** and **Longitude**. The note reads "Drops a marker on the regulator's facility network map."

Preferences — several cards:

- **System Preferences** — **Case Number Prefix** (up to 5 characters, with a live example "Case numbers will be like: XX-25-001"), **Invoice Number Prefix** (up to 5), **Staff ID Prefix** (up to 6), **Staff ID Number Length** (1 to 8 digits), **Staff ID Separator** (up to 2 characters), **Default Currency** (Ghana Cedi, US Dollar, Euro, British Pound, Nigerian Naira) and **Timezone**.
- **Body Tagging** — **Enable body tagging**, **Allow case-detail tag actions**, **Roles Allowed To Issue / Manage Tags** (Owner, Admin, Manager, Staff), **Open preview after issue / replace**, **Remind staff to issue a tag on new cases**, **Tag Code Generation** (Manual or

Sequential, with Prefix, Start Number and Number Padding and a live example), **Print Layout** and **Printer Mode**.

- **Identification Before Release** — the switch **Refuse to release a body with no identification**. When it is off, "staff are warned but can still release".
- **Identification Photographs** — the switch **Allow identification photographs**, with a panel headed "What switching this on commits you to".
- **VAT / Tax Settings** — **Enable Tax on Invoices**, then **VAT Rate (%)**, **NHIL Rate (%)**, **GETFund Rate (%)** and **VAT Registration Number (TIN)**, with a live **Invoice Preview** on GH¢1,000.00.
- **Installment Payments** — **Accept installment payments**.
- **Fleet Operations** — **Auto-close trips when the closure checklist is complete** and **Accept external hearse requests**.

Branding — your **Current logo** (used in the dashboard sidebar for all staff) and a **Logo for dark backgrounds** (used on branded emails and the login screen). Each has an upload button and a remove button.

Security — **Session Timeout** with the choices *Use platform default, No timeout, 15 minutes, 30 minutes, 1 hour, 2 hours, 4 hours and 8 hours*.

At the bottom right, one **Save Changes** button.

The screenshot displays the 'Facility Settings' page for 'Smith Funeral Home'. The interface includes a top navigation bar with a search bar and user profile. A left sidebar contains an 'ADMINISTRATION' menu with options like Staff, Practitioners, Recycle Bin, Download Center, and Settings. The main content area features a 'Facility Settings' section with tabs for General, Regulatory, Location, Preferences, Branding, and Security. The 'General' tab is active, showing fields for Facility Name (Smith Funeral Home), Primary Facility Type (dropdown), Email Address (demo@sankorra.com), Phone Number (0245784578), and Facility ID (15341609-149d-4605-8a68-a71d07653d3a). A banner at the top states 'Operating under provisional licence'. A 'Back to Settings' link is present. At the bottom right, there is an 'Ask Kofi' button.

Facility Settings on the Preferences tab showing System Preferences, the VAT card with its live invoice preview, and the six tabs across the top

WHAT YOU CAN DO HERE

To change your facility's details:

- 1 Open the tab you need and edit the fields.

- 2 Press **Save Changes** at the bottom.

To put your facility on the map:

- 1 Open the **Location** tab and fill in the Street Address and Town.
- 2 Press **Pin from address**. The Latitude and Longitude fill in themselves.
- 3 If nothing is found, type the coordinates in by hand.
- 4 Press **Save Changes**.

To switch on VAT:

- 1 Open **Preferences** and switch **Enable Tax on Invoices** on.
- 2 Check the three rates. The standard Ghana Revenue Authority rates are shown in the blue panel: VAT 15%, NHIL 2.5%, GETFund 2.5%, 20% in total.
- 3 Type your **VAT Registration Number (TIN)** — it appears on invoices and receipts.
- 4 Check the **Invoice Preview** underneath, then press **Save Changes**.

To upload your logo:

- 1 Open the **Branding** tab.
- 2 Press **Upload logo** and choose the file.
- 3 If your logo is dark, also press **Upload light logo** and choose a white or light version, so it stays visible on branded emails and the login screen.

To sign idle staff out automatically:

- 1 Open the **Security** tab.
- 2 Choose a time from **Inactivity Timeout**.
- 3 Press **Save Changes**.

Good to know

- This screen is **owner and admin only**. Anybody else sees a panel headed **Access Denied** with the line "Only facility administrators can access settings."
- **Facility Name is the only field you must fill in**, and it needs at least two characters.
- If **Save Changes** looks as though it is doing nothing, one of your entries is too long or in the wrong shape and the screen has not told you. Check that your prefixes are within the lengths given above, that the email address is a real address and that the website starts with `http://` or `https://`, then try again.
- **Save Changes stays greyed out until you change something**. That is normal.
- The three greyed regulatory fields can never be edited here. To have a licence changed you must contact the regulator.
- **The two identification switches save the moment you press them**, unlike everything else on the tab, which waits for Save Changes. Switching identification photographs **on** asks you to confirm first, and reminds you that "Your facility becomes responsible for photographs of the deceased under the Data Protection Act, 2012 (Act 843)".
- A logo must be an image file (PNG, JPG, GIF, WEBP or SVG) and **5MB or less**. Uploading a new logo **replaces the old one immediately and permanently**, with no confirmation — keep your own copy of the file.
- Choosing a **Primary Facility Type** here switches that facility type on straight away. That is different from the Facility Types screen (11.9), where you have to ask. Take care: the change is immediate and reshapes the sidebar for your whole team.
- The session timeout applies to **every signed-in user at this facility**, and staff get a two-minute warning dialog before they are signed out so they can stay in.
- Staff ID prefixes only affect **new** staff. IDs already issued do not change.

11.9 Facility types

WHAT THIS SCREEN IS FOR

seeing which kinds of facility you are set up as (funeral home, mortuary, chapel, cemetery, crematorium and so on), and asking for that to be changed. Your facility types decide which parts of Sankorra you see.

HOW TO GET HERE

Settings → Facility → General → **Manage Types**.

WHAT YOU SEE ON THE SCREEN

The heading **Facility Types** with the line "View your facility's service types and request changes". On the right, an **Import Services** dropdown and a **Request Changes** button.

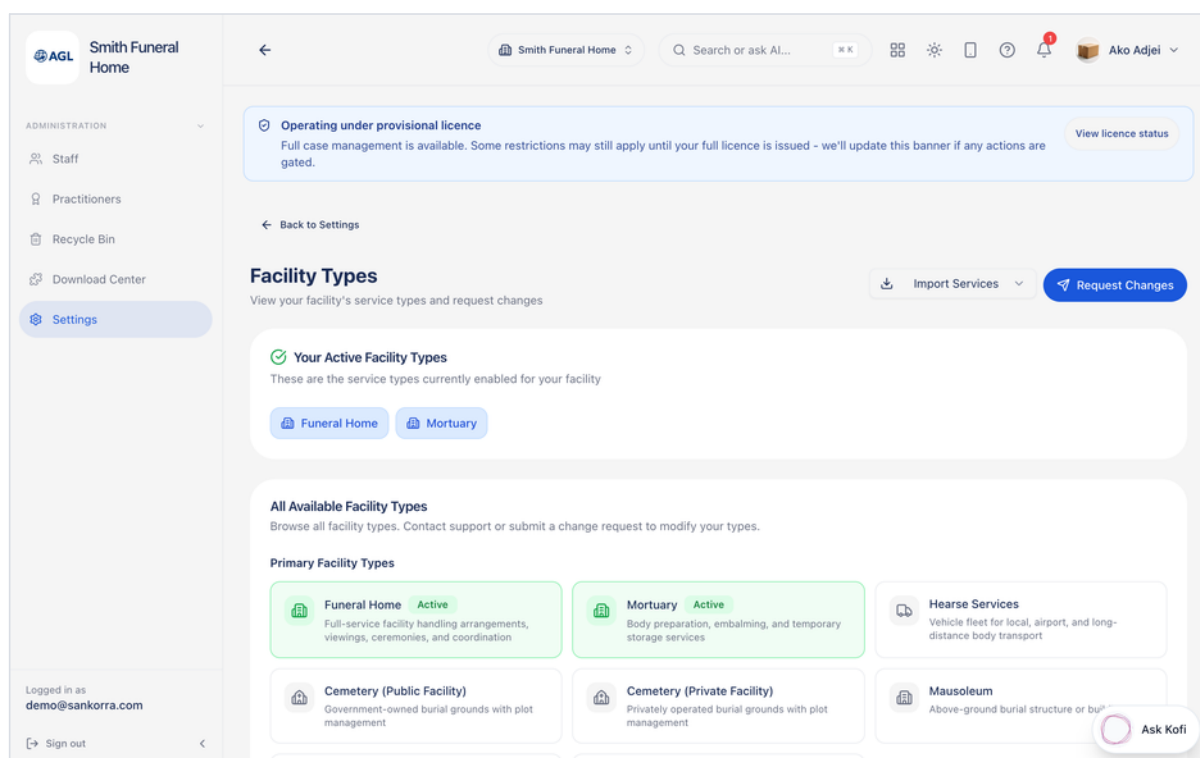
If a request is already with Sankorra, a banner appears headed **Pending Change Request**: "You have a pending request being reviewed. You can submit a new request once it's processed."

Then three cards:

- **Your Active Facility Types** — "These are the service types currently enabled for your facility", shown as badges.

- **All Available Facility Types** — every type Sankorra offers, grouped under **Primary Facility Types, Specialized Services, Retail/Manufacturing** and **Combined Operations**. The ones you already have are green and marked **Active**.
- **Change Request History** — your past requests, each with a **Pending, Approved** or **Rejected** badge, the date, the reason you gave, how many types you asked for, and any **Admin notes** from the reviewer.

At the bottom, a blue box headed **About Facility Types**: "Facility types determine which features and modules are available in your account. Some types may require verification or additional fees. Changes are reviewed by our support team."



Facility Types showing the active types, the grouped list of all available types with Active badges, and the Change Request History

WHAT YOU CAN DO HERE

To ask for a facility type to be added or removed:

- 1 Press **Request Changes**.
- 2 On the dialog headed **Request Facility Types Changes**, tick the types you want and clear the ones you do not. A type you are adding is marked "(adding)" in green; one you are removing is marked "(removing)" in red.
- 3 Type a **Reason for Change** — this is required.
- 4 Press **Submit Request**.
- 5 Wait. Nothing changes until Sankorra approves it.

To bring in a ready-made list of services for one of your types:

- 1 Press the **Import Services** dropdown and pick a facility type.

- 2 The dialog headed **Import Service Templates** lists the services available for that type. Ones you already have are marked **Already exists** and cannot be ticked.
- 3 Tick the ones you want, or press **Select All Available**.
- 4 Press **Import N Services**.

Good to know

- You cannot add or remove a facility type here yourself — you **submit a request** and Sankorra's support team reviews it.
- **Request Changes** is greyed out while an earlier request is still Pending. Wait for it to be decided.
- If you press **Import N Services** with nothing ticked, the button reads **Import All Services** and it brings in **every** template for that facility type. Check the label before you press it. Imported services cannot be undone from this screen — you would have to delete them one by one on the Services screen, and that deletion is permanent.
- The Change Request History shows how many types you asked for but not which ones, so note down what you requested.
- Only owners and admins can actually submit a request. If you are not one, the dialog still opens but submitting fails with "Failed to submit request".

11.10 Licences

WHAT THIS SCREEN IS FOR

reading the licences the regulator has issued to your facility. It is a window, not a form: you cannot change anything here.

HOW TO GET HERE

Settings → Licenses.

WHAT YOU SEE ON THE SCREEN

Breadcrumbs reading Settings → Facility Licenses, then the heading **Facility Licenses** with the line "View regulator-managed operating, cremation, transportation, embalming, and cemetery licenses assigned to this facility."

Three counts: **Active licenses** ("Currently valid regulator-issued licenses"), **Expiring soon** ("Expiring in the next 30 days") and **Non-current** ("Expired, suspended, or revoked records").

Then the card **License Register**, with the line "These licenses are managed by the regulator. Contact the regulator for issuance, renewal, suspension, or revocation actions."

Each row shows the licence type, a status badge, the licence number, and on the right **Issued** and **Expires** dates (or "Not available"), plus who issued it and any notes.

Status	What it means
active	Current and valid
expired	The date has passed

Status	What it means
suspended	Temporarily withdrawn
revoked	Permanently withdrawn

When there is nothing to show you see "No licenses on file" with the line "No regulator-issued licenses are currently visible for this facility."

The screenshot displays the 'Facility Licenses' page for 'Smith Funeral Home'. At the top, there's a banner indicating the facility is 'Operating under provisional licence'. Below this, a 'Back to Settings' link is available. The main section shows three license counts: 'Active licenses' (1), 'Expiring soon' (0), and 'Non-current' (0). Each count has a brief description. The 'License Register' section below lists the details of the active license, including its status, ID, issue date, expiration date, and issuer.

Facility Licenses showing the three counts and the License Register with rows in different statuses

WHAT YOU CAN DO HERE

There are no actions on this screen. Read the register and press **Back to Settings** when you are done.

Good to know

- Nothing on this screen can be edited, by anybody. Renewals, suspensions and new licences all come from the regulator.
- **Expiring soon** only counts licences whose status is *active*. A licence that has already lapsed appears under **Non-current** instead, with no warning.
- Watch **Expiring soon** every month. Sankorra does not chase the regulator for you.

11.11 Your profile

WHAT THIS SCREEN IS FOR

your own details: your name, your photo, your phone number, your signature and your password. It changes nothing for anybody else.

HOW TO GET HERE

Settings → Profile. Staff who are not admins land here automatically when they open Settings.

WHAT YOU SEE ON THE SCREEN

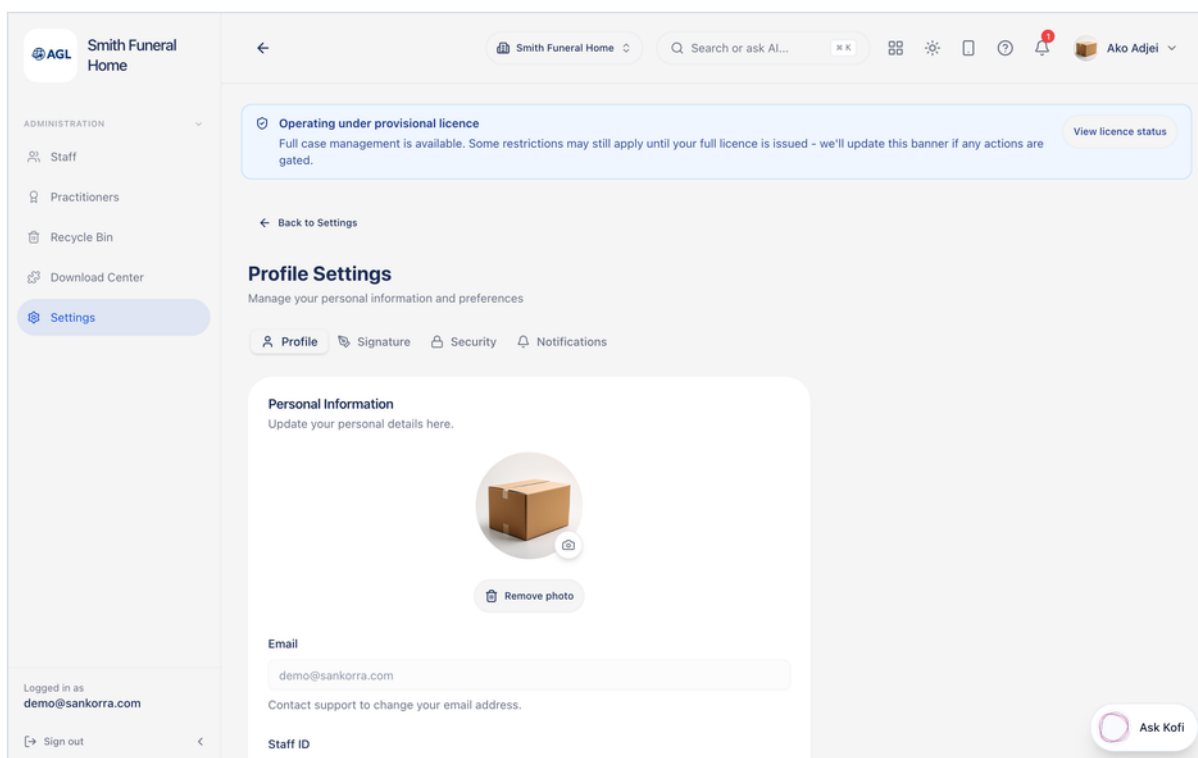
The heading **Profile Settings** with the line "Manage your personal information and preferences", and four tabs: **Profile**, **Signature**, **Security** and **Notifications**.

Profile — the card **Personal Information**. Your photo with a camera button and a **Remove photo** link, then **Email** (greyed out, with the note "Contact support to change your email address"), **Staff ID** (greyed out, with the note "You can sign in with this Staff ID or your email address. An admin can change it."), **First Name**, **Last Name** and **Phone Number**. A **Save Changes** button sits at the bottom.

Signature — the card **Your Signature** where you draw your signature with a finger or mouse, with **Update Signature**, **Remove** and **Save Signature**. Under it, **Signature Display** with the switch **Show signature on documents** ("When enabled, your signature will appear on generated reports and documents"). Until you have drawn a signature, an amber note reads "Create a signature above to enable this setting."

Security — the card **Change Password** with **Current Password**, **New Password** and **Confirm New Password**, and an **Update Password** button.

Notifications — the card **Email Notifications** with six switches: **Case Updates**, **New Bookings**, **Payment Received**, **Team Messages**, **Weekly Digest** and **Product Updates**.



Profile Settings on the Profile tab, with the photo, the greyed Email and Staff ID fields and the editable name and phone fields

WHAT YOU CAN DO HERE

To change your name or phone number:

- 1 Edit the fields and press **Save Changes**.

To add your signature:

- 1 Open the **Signature** tab.
- 2 Draw your signature in the box.
- 3 Press **Save Signature**.
- 4 Switch **Show signature on documents** on if you want it printed.

To change your password:

- 1 Open the **Security** tab.
- 2 Type your current password, then the new one twice.
- 3 Press **Update Password**.

Good to know

- **First Name and Last Name are both required.**
- A new password must be at least **8 characters**, and the two boxes must match.
- Your **Email** and **Staff ID** cannot be changed here. An administrator can change your Staff ID from your team member page; changing an email address needs support.
- The switches on the **Notifications** tab are not saved anywhere and there is no Save button on that tab. They will be back as they were the next time you open the page, and they do not change which emails you receive. Ignore them.
- Pressing **Remove** on your signature does not ask you to confirm.

11.12 Security

WHAT THIS SCREEN IS FOR

your own sign-in security: two-factor authentication, a list of recent sign-ins, and a way to sign yourself out of every other device.

HOW TO GET HERE

Settings → Security → **Manage**.

WHAT YOU SEE ON THE SCREEN

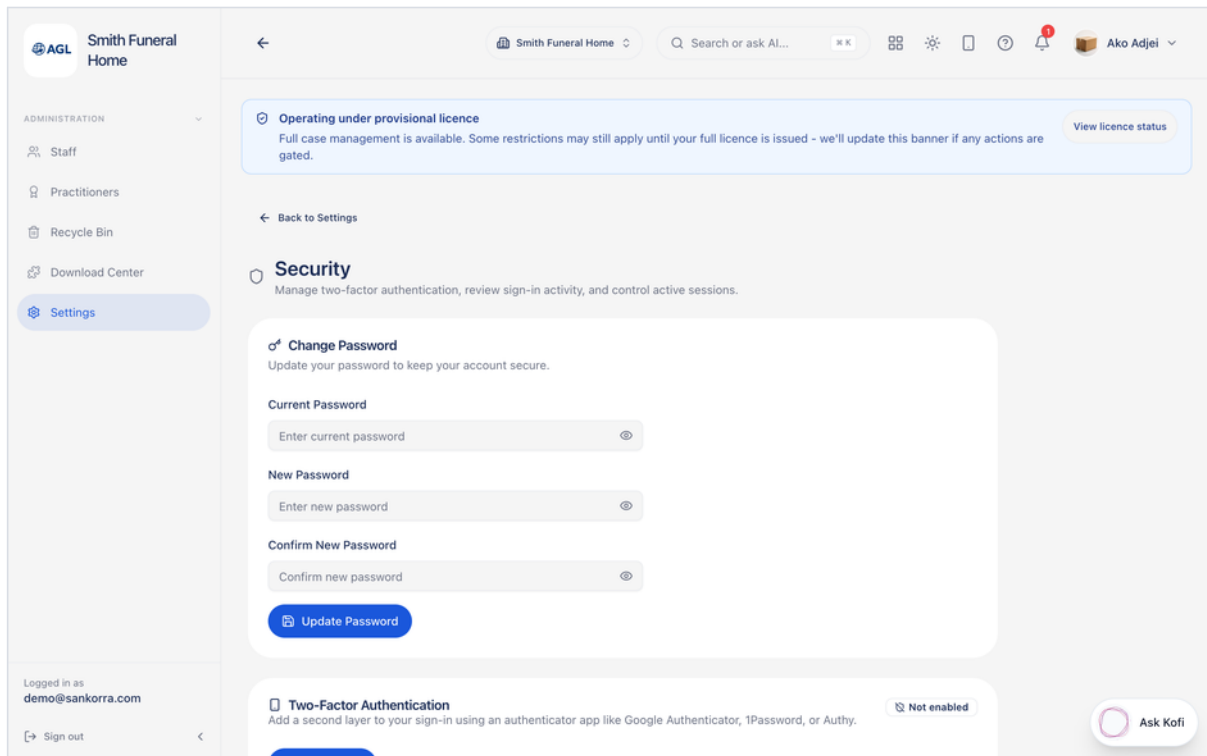
The heading **Security** with the line "Manage two-factor authentication, review sign-in activity, and control active sessions", and four cards.

Change Password — the same three boxes as on your profile, with **Update Password**.

Two-Factor Authentication — "Add a second layer to your sign-in using an authenticator app like Google Authenticator, 1Password, or Authy." A badge reads **Enabled** or **Not enabled**, with an **Enable 2FA** or **Disable 2FA** button.

Recent sign-ins — "The last 20 times your account was signed in. Report anything you don't recognise to support." The columns are **When**, **Method**, **Location**, **Device** and **IP**. The Method badge is one of Password, Password + 2FA, Recovery code, Magic link, OAuth, Password change, Password reset or Unknown. A sign-in from somewhere new is flagged with an amber **New location** badge.

Active sessions — "Sign out of every other browser or device where your account is signed in. Your current session stays active", with a **Sign out of other devices** button.



The Security page showing the 2FA card enabled and the Recent sign-ins table with a "New location" badge

WHAT YOU CAN DO HERE

To switch on two-factor authentication:

- 1 Press **Enable 2FA**.
- 2 Open your authenticator app on your phone, add a new account and scan the QR code shown under **Scan this QR code**. If your phone cannot scan it, type the **Manual entry key** instead.
- 3 Type the six digits your app shows into **Verification code**.
- 4 Press **Verify & enable**.

To switch it off:

- 1 Press **Disable 2FA**.
- 2 Press OK on the message "Disable two-factor authentication? You can re-enable it at any time."

To sign out everywhere else:

- 1 Press **Sign out of other devices**.
- 2 Press OK on the message "Sign out of all other devices? You'll stay signed in here."

Good to know

- Two-factor authentication is the single strongest thing you can switch on. If you are the owner, switch it on for yourself first.
- The two confirmations on this screen are plain browser messages, not Sankorra dialogs. Disabling 2FA is **one press and OK** — there is no second warning.
- Check **Recent sign-ins** whenever you suspect somebody else has your password. A **New location** badge on a sign-in you do not recognise is worth reporting.
- Everything on this screen is about **your own account**. To suspend somebody else, use their team member page (11.2).

11.13 Dashboard settings

WHAT THIS SCREEN IS FOR

choosing which panels appear on your dashboard, where they sit, and whether the dashboard leans towards pictures or numbers.

HOW TO GET HERE

Settings → Dashboard.

WHAT YOU SEE ON THE SCREEN

The heading **Dashboard Settings** with the line "Customize which widgets appear on your dashboard and their order".

First, the card **View density** with the row "Visual vs detailed" and the note "Visual shows charts and at-a-glance graphics. Detailed shows numbers, tables, and text summaries." Two buttons: **Visual** and **Detailed**.

Then the line "Drag widgets to reorder, toggle switches to show/hide", with **Reset to Defaults** and **Save Changes**.

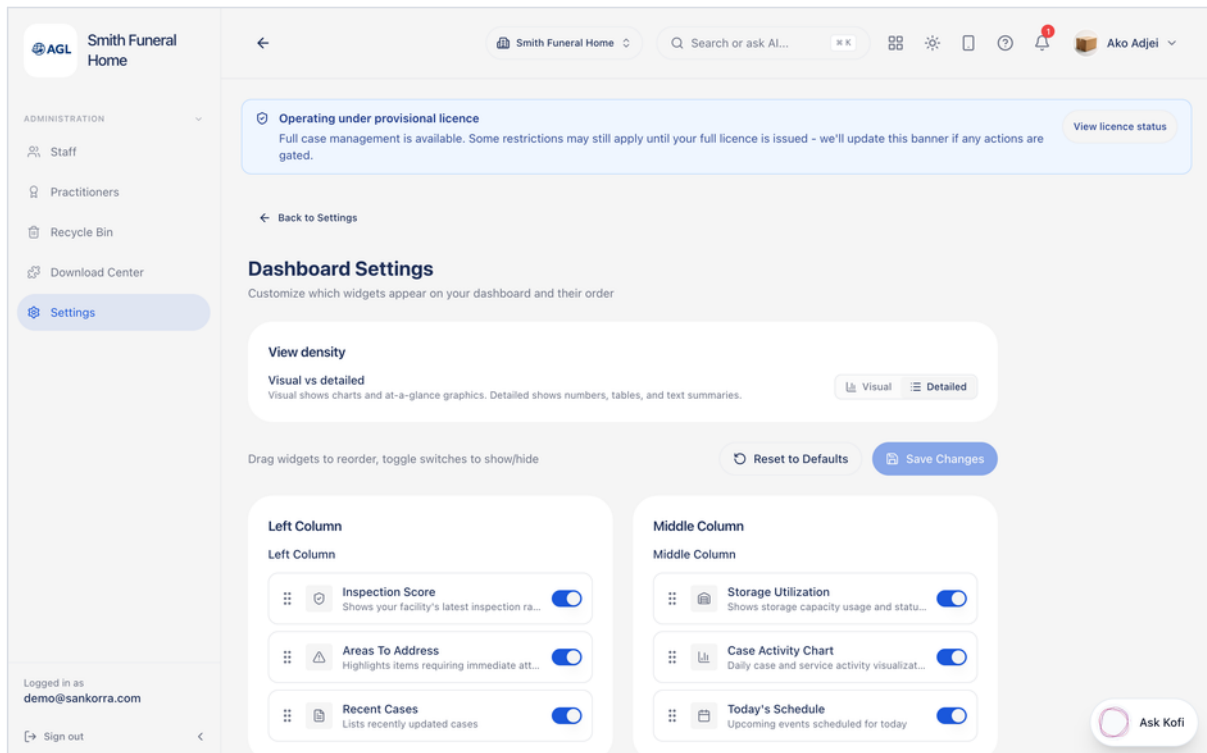
Below, four cards — **Left Column**, **Middle Column**, **Right Column** and

Full Width — each listing the panels in that part of the dashboard with a switch beside each one. An empty card reads "No widgets in this column".

The panels are Inspection Score, Areas To Address, Recent Cases, Storage Utilization, Case Activity Chart, Today's Schedule, Collected Revenue, Team, Fleet Status, AI Insights, Cemetery Map and Overdue Invoices.

Some rows have a padlock instead of a switch, marked **Module required** (the feature is not switched on for your facility) or **No access** (your role does not allow it).

At the bottom, a blue box headed **Widget Availability**.



Dashboard Settings showing the View density buttons and the four column cards with switches and one padlocked row

WHAT YOU CAN DO HERE

To hide or show a panel:

- 1 Find it in its column and press the switch.
- 2 Press **Save Changes**.

To change the order of panels:

- 1 Drag a row up or down within its column.
- 2 Press **Save Changes**.

To switch between pictures and numbers:

- 1 Press **Visual** or **Detailed**. This one saves itself straight away.

To start again:

- 1 Press **Reset to Defaults**.

Good to know

- **View density saves immediately**; the switches and the order do not — they wait for **Save Changes**. If you leave the page without pressing it, your changes are lost.
- You can only move a panel **up and down within its own column**. Nothing moves a panel from one column to another.
- A padlocked row is not broken. **Module required** means the feature is uninstalled or not on your plan (see 11.6); **No access** means your role does not include it.
- **Reset to Defaults** puts back the full owner layout, which for a staff or viewer account is more than they would normally have.

11.14 Notifications

WHAT THIS SCREEN IS FOR

your own notification preferences, and two test buttons that check your facility's email and text messaging are working.

HOW TO GET HERE

Settings → Notifications.

WHAT YOU SEE ON THE SCREEN

The heading **Notifications** with the line "Configure how you receive notifications", a **Save Changes** button, and three tabs.

Notification Channels — the card **Email Notifications** with **Email Digest Frequency** (Real-time, Daily Digest, Weekly Digest, Disabled) and a **Send Test Email** button. Then the card **SMS Notifications** with a switch; when it is on you see **Phone Number** and a **Send Test SMS** button, plus a note headed **SMS Charges May Apply**.

Categories — the card **Notification Categories** with a grid: **Category**, **Email**, **SMS**. The six rows are **Case Updates**, **Billing & Payments**, **Scheduling**, **Staff & Team**, **Fleet & Transport** and **System Alerts**.

Preferences — the card **Quiet Hours** with a switch, a **Start Time** and an **End Time**; and the card **Quick Actions** with **Enable All**, **Disable All** and **Reset to Defaults**.

AGL Smith Funeral Home

ADMINISTRATION

- Staff
- Practitioners
- Recycle Bin
- Download Center
- Settings

Logged in as demo@sankorra.com

Sign out

Smith Funeral Home

Search or ask AI...

Ako Adjei

Operating under provisional licence

Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated.

View licence status

Back to Settings

Notifications

Configure how you receive notifications

Save Changes

Notification Channels Categories Preferences

Email Notifications

Receive notifications via email

Active

Email Digest Frequency

Real-time

You'll receive emails immediately when events occur

Send Test Email

SMS Notifications

Receive urgent notifications via text message

Phone Number

+233550916600

Send Test SMS

Ask Kofi

Notifications on the Notification Channels tab showing the email digest dropdown, Send Test Email, and the SMS card

WHAT YOU CAN DO HERE

To check your facility can send email:

- 1 Press **Send Test Email**. It goes to your own email address.
- 2 Look in your inbox. The subject reads "Test email from your facility".

To check your facility can send text messages:

- 1 Switch **SMS Notifications** on.
- 2 Type a mobile number in **Phone Number**.
- 3 Press **Send Test SMS** and check the phone.

Good to know

- **The two test buttons really do send.** The test SMS uses one of your facility's real SMS credits, and it goes to whatever number is in the box even if you have not saved. Use them once to confirm things work, not repeatedly.
- If **Send Test Email** fails with "Email is disabled for this facility", email is switched off on the Communications screen (11.15). Switch it on there. The **Active** badge on this card does not reflect that, so do not rely on it.
- If **Send Test SMS** fails saying the allowance and add-on credits are used up, buy more credits from the add-on store (11.19).
- **The switches and choices on this screen do not change which messages are actually sent.** They are stored against your own account and nothing reads them. What really controls messages to families and staff is the **Communications** screen (11.15), the **Inventory Alerts** screen (11.16) and the **Temperature Monitoring** screen (11.17). If somebody is getting messages they do not want, or not getting ones they need, go there — not here.
- **Enable All**, **Disable All** and **Reset to Defaults** show a success message the moment you press them, but nothing is stored until you press **Save Changes**. There is no confirmation before they wipe all six rows.

11.15 Communications

WHAT THIS SCREEN IS FOR

the real controls for messages leaving your facility: whether email and text messaging work at all, how much of your monthly allowance is left, how invoices and reminders are delivered, how inspection notices go out, and how release verification codes reach the family.

HOW TO GET HERE

Settings → Communications.

WHAT YOU SEE ON THE SCREEN

The heading **Communications** with the line "Manage the platform-managed SMS and email channels used by your facility." On the right, **Open Integrations**.

Then seven cards.

SMS Channel — a badge reading **Enabled** or **Disabled**, your **Monthly plan credits** with a progress bar, then **Plan credits left**, **Add-on credits** and **Segments this month**. A warning appears past 80%: "Approaching this month's SMS allowance." When credits run out, a red panel headed **SMS sending is paused** appears with a **Buy SMS credits** button.

Email Channel — the same shape: **Enabled** or **Disabled**, **Monthly usage**, **Emails sent** and **Bounced**.

Channel Settings — "Control which channels are active and how recipients can reply." Four controls: the switch **Enable SMS**, the field **Custom Sender ID**, the switch **Enable Email**, and the field **Reply-To Email**. A **Reset** and a **Save Changes** button sit under them.

Invoice Delivery & Reminders — switches **Customer App**, **Email**, **SMS** and **Automated Reminders**, then **Reminder Interval (days)** and **Maximum Automated Reminders**, with a **Save Reminder Rules** button.

Inspection Notices & Reminders — switches **Facility Inbox**, **Email**, **SMS** and **Automated Reminders**, then **Reminder Days Before**, **Additional Email Recipients** and **SMS Numbers**, with a **Save Inspection Rules** button.

Case Release Verification — "Choose how 6-digit discharge or release verification codes are delivered to the primary contact." Three switches: **Customer App**, **SMS** and **Email**.

Messaging Limits — your monthly **SMS limit** and **Email limit**, read only, with a **Review Plan and Limits** button.

Communications showing the SMS Channel usage bar, Channel Settings with its two switches, and the Invoice Delivery card

WHAT YOU CAN DO HERE

To stop or start all messaging:

- 1 Press the **Enable SMS** or **Enable Email** switch in **Channel Settings**. It saves the moment you press it.

To set where replies go:

- 1 Type an address in **Reply-To Email**.
- 2 Press **Save Changes** in that card.

To chase unpaid invoices automatically:

- 1 In **Invoice Delivery & Reminders**, choose which channels to use — **Customer App**, **Email**, **SMS**.

- 2 Switch **Automated Reminders** on.
- 3 Set **Reminder Interval (days)** — how long to wait after the last successful notice before the next reminder. It must be at least 1.
- 4 Set **Maximum Automated Reminders**. Put 0 to stop automated reminders while keeping the manual reminder button.
- 5 Press **Save Reminder Rules**.

To set up inspection notices:

- 1 Choose the channels: **Facility Inbox, Email, SMS**.
- 2 In **Reminder Days Before**, type whole numbers separated by commas, for example 7, 1. Use 0 for a same-day reminder. At least one number is required.
- 3 Type any extra addresses in **Additional Email Recipients**, one per line.
- 4 Type any mobile numbers in **SMS Numbers**, one per line.
- 5 Press **Save Inspection Rules**.

Good to know

- **Enable SMS and Enable Email are the master switches for the whole facility.** Turning one off stops *everything* on that channel: invoices, reminders, inspection notices, release codes, inventory alerts and temperature alerts. There is no warning and no confirmation.
- The switches save the instant you press them. The **text and number fields** do not — each of those cards has its own Save button. Press it.
- **Customer App** and **Facility Inbox** are not the same thing. **Customer App** sends to the family through the customer mobile app. **Facility Inbox** puts the notice in your own staff notification bell inside this dashboard.
- **Case Release Verification matters operationally.** At least one reachable channel must be available before a case can be discharged or released. If you switch all three off, your staff may find they cannot release a body.
- Invoice reminders only chase **overdue invoices that still have a balance and were sent successfully before**. Using the manual reminder button on an invoice resets its reminder timer.
- Inspection reminders are worked through every hour and delivered around 08:00 in your facility's timezone.
- Neither monthly limit can be changed here. SMS comes with your plan plus any add-on credits you buy; the email limit is set by Sankorra.
- Only owners and admins can change anything here. If you are a manager or staff member the switches will appear to move and then snap back with "Failed to update communications settings".

11.16 Inventory alerts

WHAT THIS SCREEN IS FOR

telling your team when stock is running low or has run out, sending a daily stock summary, and deciding what happens to storefront items that run out.

HOW TO GET HERE

Settings → Inventory Alerts.

WHAT YOU SEE ON THE SCREEN

The heading **Inventory Notifications** with the line "Configure alerts for low stock, out of stock, and daily inventory reports", and three tabs: **Alerts**, **Daily Digest** and **History**.

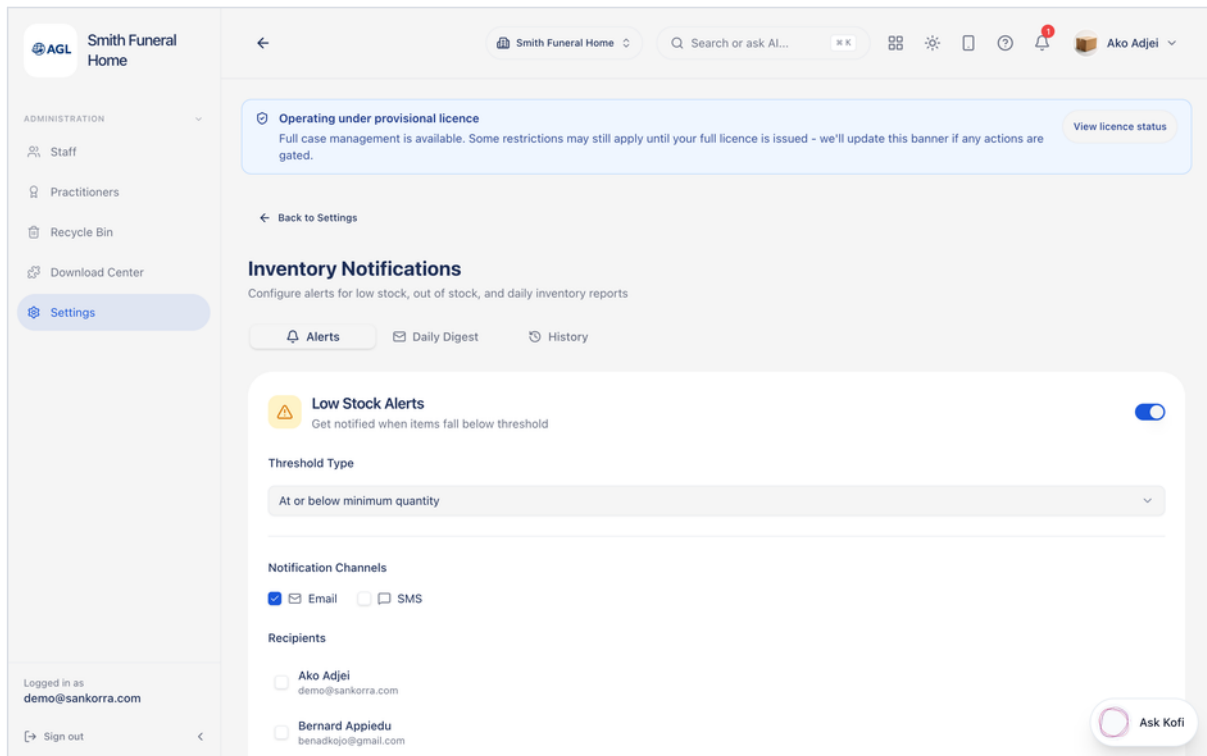
Alerts holds four cards:

- **Low Stock Alerts** — "Get notified when items fall below threshold", with a switch. Inside: **Threshold Type** (*At or below minimum quantity*, *At or below reorder point*, *Custom percentage of max quantity*), a **Percentage Threshold** slider from 5% to 50% when you pick the custom option, **Notification Channels (Email, SMS)**, **Recipients** (a tick list of your staff) and a **Send Test Alert** button.
- **Out of Stock Alerts** — "Urgent alerts when items reach zero quantity", with the same channels, recipients and test button.
- **Notification Behavior** — a **Cooldown Period** slider from 1 to 168 hours ("Don't send another notification for the same item within this period") and the switch **Notify on Every Transaction**.
- **Storefront Items** — three switches: **Auto-hide on out of stock**, **Auto-show on restock** and **Force SMS on storefront out-of-stock**.

Daily Digest — the card **Daily Inventory Digest** with a switch, then **Send Time**, **Timezone** (Ghana (GMT), Nigeria (WAT), UTC), the switch **Resale Items Only**, an **Email Recipients** tick list and a **Send Test Digest** button.

History — the card **Notification History**, "Recent notifications sent from this facility", showing the last 20 with a type badge (low stock, out of stock, daily digest), a channel badge (email, sms, in_app), the subject, any error, and when it was sent.

At the bottom of the first two tabs, a **Save Settings** button.



Inventory Notifications on the Alerts tab showing Low Stock Alerts with its recipients list and the Storefront Items card

WHAT YOU CAN DO HERE

To set up a low-stock alert:

- 1 Switch **Low Stock Alerts** on.
- 2 Choose a **Threshold Type**.
- 3 Tick **Email**, **SMS** or both under **Notification Channels**.
- 4 Tick the people who should get it under **Recipients**.
- 5 Press **Save Settings**.

To hide sold-out items from your shop automatically:

- 1 Go to the **Storefront Items** card.
- 2 Leave **Auto-hide on out of stock** on.
- 3 Switch **Auto-show on restock** on if you want items to come back by themselves once you restock them.
- 4 Press **Save Settings**.

To send a daily stock summary:

- 1 Open **Daily Digest** and switch it on.
- 2 Set the **Send Time** and **Timezone**.
- 3 Tick who should receive it.
- 4 Press **Save Settings**.

Good to know

- **Auto-hide on out of stock** genuinely changes what the public sees. When a storefront item reaches zero it is set back to private, so families do not see "Inquire" on something you cannot supply. The system marks it so you can tell auto-hidden items from ones you hid by hand.
- **Auto-show on restock** only brings back items the **system** hid. Anything you hid yourself stays hidden until you show it again.
- **The test buttons only ever email you, the signed-in user.** They ignore the Recipients list and the SMS tick box, and they use a made-up item called "Sample Inventory Item". A test that arrives proves email works — it does not prove your recipients or your SMS setup are right.
- If the **History** tab fills with rows that never reached anybody, or your recipients report they never receive low-stock emails while the test works, the alerts are not being delivered. Contact Sankorra support rather than changing the settings again.
- **Send Test Digest** sends even when the digest is switched off.
- This screen has no confirmation on anything, and any active member of your facility who knows the address can change it — including the storefront switches. Check it occasionally.

11.17 Temperature monitoring

WHAT THIS SCREEN IS FOR

reminding staff to record cold-room temperatures, alerting you when a unit has been missed, and emailing compliance reports.

HOW TO GET HERE

Settings → Temperature Monitoring.

WHAT YOU SEE ON THE SCREEN

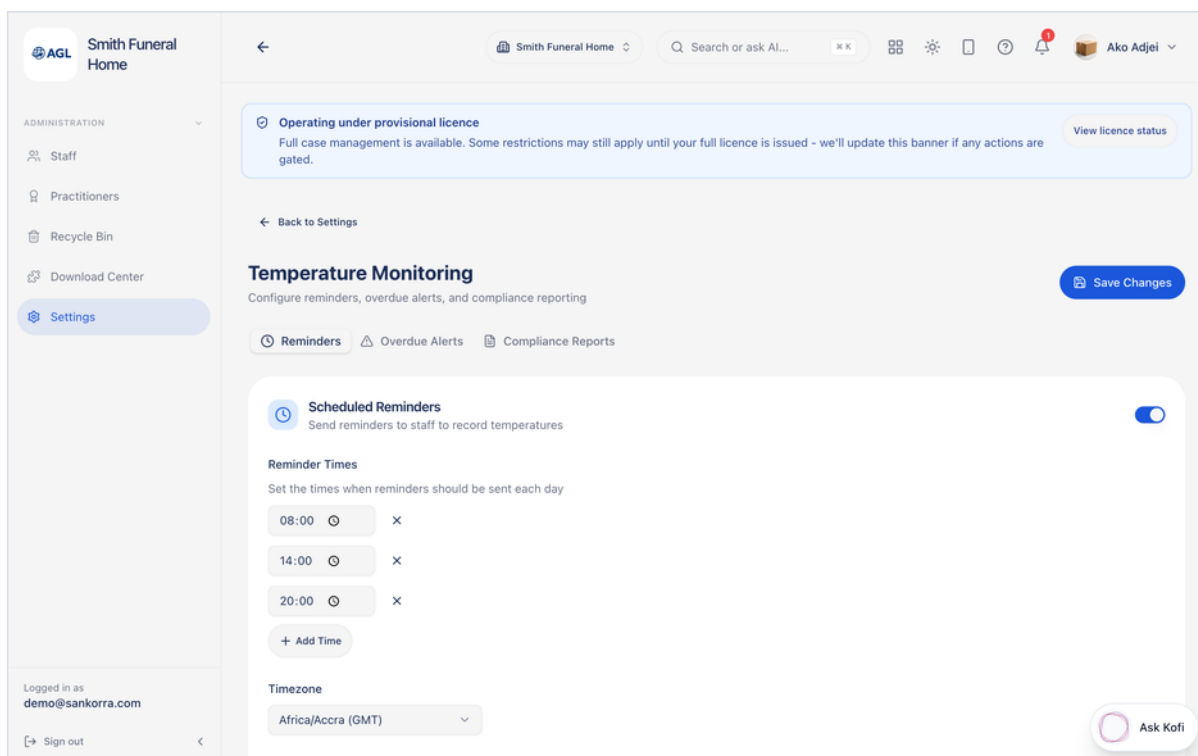
The heading **Temperature Monitoring** with the line "Configure reminders, overdue alerts, and compliance reporting", a **Save Changes** button, and three tabs.

Reminders — the card **Scheduled Reminders** with a switch. Inside: **Reminder Times** (three times to start with, 08:00, 14:00 and 20:00, with an **Add Time** button), **Timezone**, **Notification Channels (Email, SMS)** and **Recipients** with **Select All** and **Clear** buttons.

Overdue Alerts — the card **Overdue Alerts** with a switch. Inside: an **Overdue Threshold** slider from 1 to 48 hours ("Alert when a unit has no reading for this many hours"), **Notification Channels**, **Recipients**, and an **Escalation** panel with its own switch and a second slider from 1 to 72 hours ("Send a second, more urgent alert if still overdue after:"). Below the card, a permanent note headed **In-App Warning**: "Overdue warnings will also appear in the dashboard and cold room operations page, regardless of these notification settings."

Compliance Reports — the card **Automated Compliance Reports** with a switch. Inside: **Report Frequency** (Daily, Weekly, Monthly), then **Day of Week** or **Day of Month** depending on your choice, **Send Time**, **Email Recipients** (typed in one at a time and shown as removable chips), and **Report Options (Include temperature trend charts, Only include readings**

with alerts). Below the card, a note headed **Manual Reports**: "You can also generate compliance reports on-demand from the Storage Units temperature tab, regardless of these automated settings."



Temperature Monitoring on the Overdue Alerts tab with the threshold slider, recipients list and the Escalation panel

WHAT YOU CAN DO HERE

To remind staff to take readings:

- 1 Switch **Scheduled Reminders** on.
- 2 Set the **Reminder Times**. You need at least one and can have up to six.
- 3 Check the **Timezone**.
- 4 Tick **Email** or **SMS**.
- 5 Choose the staff under **Recipients**.
- 6 Press **Save Changes**.

To be told when a unit has been missed:

- 1 Switch **Overdue Alerts** on.
- 2 Drag **Overdue Threshold** to the number of hours you will tolerate.
- 3 Tick the channels and choose recipients.
- 4 Switch **Escalation** on if you want a second, louder alert, and set its hours.
- 5 Press **Save Changes**.

To email a compliance report automatically:

- 1 Switch **Automated Compliance Reports** on.
- 2 Choose **Report Frequency** and the day.

- 3** Set the **Send Time**.
- 4** Type each address under **Email Recipients** and press the plus button.
- 5** Choose your **Report Options**.
- 6** Press **Save Changes**.

Good to know

- **This appears only if your subscription includes temperature monitoring.** Otherwise you see a panel reading "Temperature Monitoring Not Available".
- Only owners and admins can save. Anybody else sees a panel headed **View only**: "Only facility owners and admins can change temperature monitoring settings. You can review the current configuration below." The switches will still move for them, but **Save Changes** stays greyed out.
- **One Save Changes button saves all three tabs.** You can set up reminders, overdue alerts and reports and save once at the end.
- **A compliance report with no email addresses is still generated but never delivered**, and nothing warns you. Always add at least one address.
- For **Day of Month**, keep to 1-28 as the hint says. Months are not all the same length and a report set for the 31st will be missed in most months.
- The on-screen overdue warnings on the dashboard and the cold room page are **always** shown. Nothing on this page turns them off.
- There is no test button anywhere on this screen. To see a report, generate one by hand from the temperature tab on Storage Units.
- Pressing **Clear** under Recipients empties the list at once and, once saved, quietly stops the alerts reaching anybody.

11.18 Payment providers

WHAT THIS SCREEN IS FOR

connecting the payment company that will collect card and mobile-money payments from families on your behalf.

HOW TO GET HERE

Settings → Payments.

WHAT YOU SEE ON THE SCREEN

The heading **Payment Settings** with the line "Configure online payment providers to accept payments from customers".

A blue panel headed **Accept Online Payments** explains: "Configure a payment provider to allow customers to pay invoices online. We support Paystack, Flutterwave, and Hubtel for card and mobile money payments. NeraSika mobile money is available platform-wide and does not require per-facility setup."

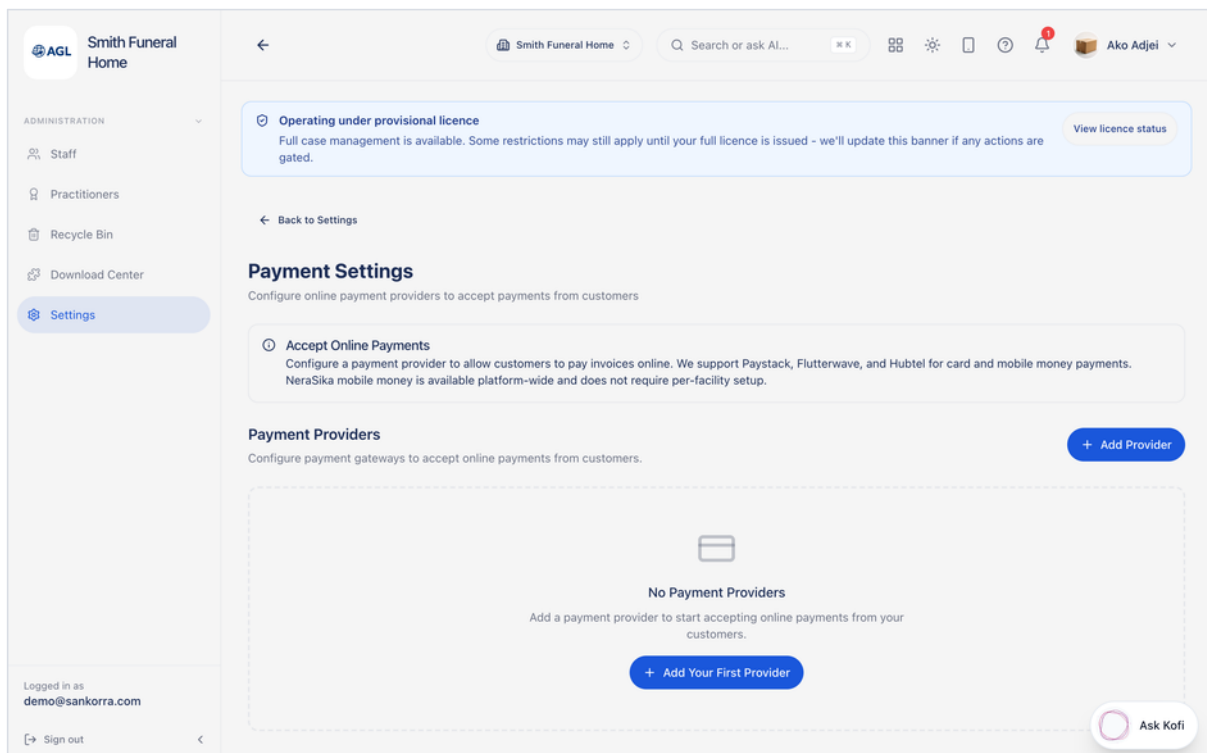
Then the card **Payment Providers**, with an **Add Provider** button. Each provider you have set up appears as a card with its name, a **Default** badge if it is the one that will be used, an **Active** badge, and small chips listing the payment methods you enabled (card, mobile money, bank

transfer and so on). On the right are three small icon buttons: a gear ("Edit provider settings"), a star ("Set as default") and a red bin ("Remove provider").

If you have no providers yet you see **No Payment Providers** with a button reading **Add Your First Provider**.

If you have providers but none is marked as the default, a red panel appears headed **No Default Provider**.

At the bottom, once you have at least one provider, a **Webhook Configuration** block listing a web address for each provider with a **Copy** link.



Payment Settings showing one configured provider card with its Default and Active badges and method chips

WHAT YOU CAN DO HERE

To connect a payment provider:

- Paystack: **Public Key** and **Secret Key**.
- Flutterwave: **Public Key**, **Secret Key** and **Encryption Key**.
- Hubtel: **Client ID**, **Client Secret** and **Merchant Account Number**.

- 1 Press **Add Provider**.
- 2 Choose the provider from the cards shown — **Paystack**, **Flutterwave** or **Hubtel**.
- 3 Read the setup instructions in the panel, which tell you where to find the keys in that provider's own dashboard. The **Open Provider Dashboard** link takes you there.
- 4 Under **API Credentials**, type the keys the provider gave you:
- 5 Under **Enabled Payment Methods**, tick the methods you want to accept. At least one is required.
- 6 Tick **Set as default provider** if this is the one to use.

7 Press **Add Provider**.

To make a provider the default one:

- 1 Press the star button on its card.

To remove a provider:

- 1 Press the red bin on its card.
- 2 Press OK on the message "Are you sure you want to remove this payment provider?"

Good to know — before you press the gear button

- **Opening a provider to edit it and saving will wipe the keys you typed in before.** The key boxes are deliberately left blank when you open them, and saving writes those blanks over your stored keys — which stops payments working. If you only want to change which methods are enabled or which provider is the default, **do not** use the gear. Use the star button for the default, and if you must change the methods, type all your keys in again before saving.
- The **Active** badge is always shown. It does not mean the keys have been checked. There is no "test connection" button, so the only real test is a live payment.
- The keys are not shown to you again after you save.
- Every key box will accept being left empty and the provider will still save. Check your keys carefully — an empty or wrong key will only show up when a family tries to pay.
- **Removing a provider deletes the keys with it.** You will have to fetch them from the provider's dashboard again.
- The addresses in **Webhook Configuration** are for you to paste into your provider's dashboard so it can tell Sankorra a payment succeeded. If payments are taken but never appear in Sankorra, this is the first thing to check with support.
- NeraSika mobile money needs no setup here — it works for every facility.
- This screen has no role gate of its own, so a staff member who knows the address can open it. Keep your provider keys as you would keep your bank details.

11.19 Billing and your plan

WHAT THIS SCREEN IS FOR

your subscription: which plan you are on, how much of it you are using, changing plan, buying extra capacity, and paying Sankorra's invoices.

HOW TO GET HERE

Settings → Billing.

WHAT YOU SEE ON THE SCREEN

The heading **Billing & Subscription** with the line "Manage plans, add-ons, and platform invoices from one billing workspace", and four sections down the left:

- 1 **Plan Overview** — "Current subscription, live usage, and included capacity."
- 2 **Change Plan** — "Upgrade or switch your subscription. Effective immediately."

3 Add-on Store — "Purchase extra capacity for staff, storage, and messaging."

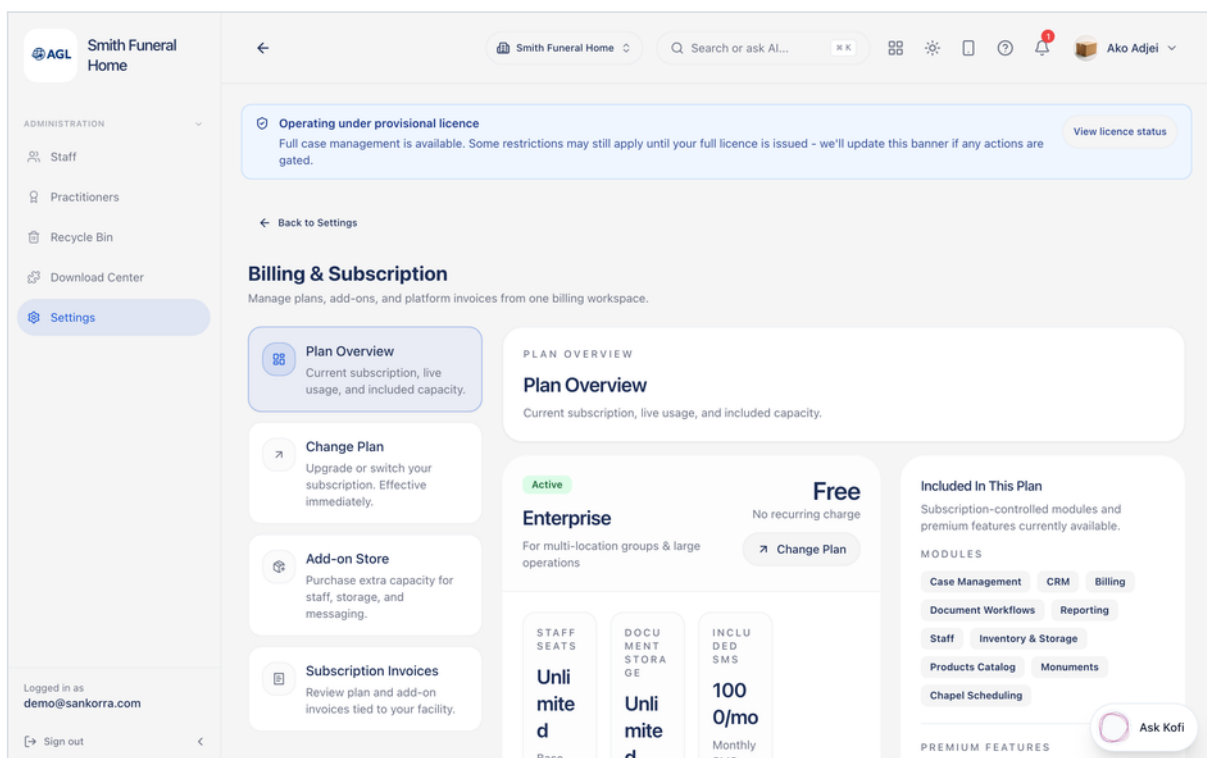
4 Subscription Invoices — "Review plan and add-on invoices tied to your facility."

Plan Overview shows your plan name and price, a status badge (**Active**, **Trial**, **Past Due**, **Expired** or **Cancelled**), when it renews, and a **Change Plan** button. Under it, your included capacity — **Staff seats**, **Storage units**, **Document storage** and **Included SMS** — where an unlimited allowance reads "Unlimited". Then **Included In This Plan** (the modules and premium features you have), **Live usage** (Storage Units, Staff Users, Document Storage, SMS Credits) and **Active add-ons**.

Change Plan lists every plan as a card with its price per month and a button: **Active** on the one you are on, **Upgrade to plan** or **Switch to plan**, or **Contact sales** for plans that are priced individually.

Add-on Store has category filters — **All Add-ons**, **Storage**, **Messaging**, **Staff**, **Modules** — and a card per add-on with what it adds, how it is billed, its price and a **Purchase** button.

Subscription Invoices has filter buttons **All**, **Pending**, **Paid** and **Overdue**, and a table with the columns Invoice #, Type, Amount, Due Date, Status and Actions. Status badges are **Draft**, **Pending**, **Paid**, **Overdue**, **Cancelled** and **Refunded**.



Billing & Subscription on Plan Overview showing the plan card, included capacity tiles and live usage

WHAT YOU CAN DO HERE

To move to a different plan:

- 1 Open **Change Plan**.
- 2 Press **Upgrade to plan** or **Switch to plan** on the plan you want.
- 3 Read the dialog headed **Confirm plan change**: "The new tier takes effect right away. Your next monthly invoice will be charged at the new rate."

4 Press **Confirm change**.

To buy extra capacity:

- 1 Open **Add-on Store** and pick a category.
- 2 Press **Purchase** on the add-on you want.
- 3 Choose a **Quantity** — 1, 2, 5 or 10.
- 4 Check **Total due** and press **Pay amount**. You are taken to the payment page.

To pay a Sankorra invoice:

- 1 Open **Subscription Invoices**.
- 2 Find the invoice and press **Pay**. You are taken to the payment page.

Good to know

- This screen is **owner and admin only**. Anybody else sees the **Access Restricted** panel.
- There are **two different ways to change plan on this screen and they do not work the same way**. The **Change Plan** section switches your plan over immediately and bills you on your next monthly invoice. The **Change Plan** button on **Plan Overview** instead takes you to a checkout page and asks for payment now. If you are not sure which you want, use the **Change Plan** section down the left.
- A plan change takes effect **straight away** and the remaining days on your current cycle are absorbed at no extra charge.
- Plans that are priced individually show **Contact sales** rather than a purchase button.
- The **Pay** button only appears on invoices that are Pending or Overdue.
- The download button on an invoice row does not yet produce a file — pressing it shows "Invoice download coming soon". If you need a copy of a Sankorra invoice, ask support.
- If a screen elsewhere in Sankorra tells you to upgrade your plan, it sends you here. A manager or staff member who follows that link will land on the Access Restricted panel, so they will need to ask you.

11.20 Appearance

WHAT THIS SCREEN IS FOR

how Sankorra looks on the screen you are sitting at: light or dark, text size, corners, colours and spacing.

HOW TO GET HERE

Settings → Appearance.

WHAT YOU SEE ON THE SCREEN

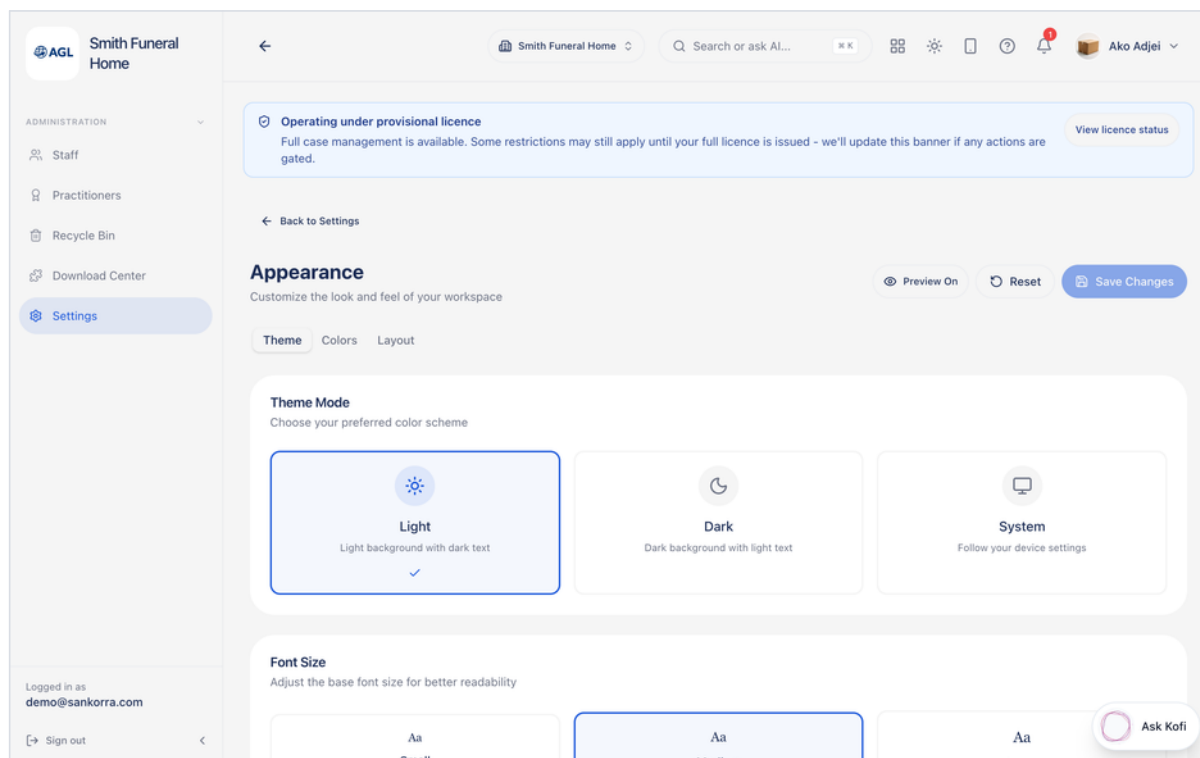
The heading **Appearance** with the line "Customize the look and feel of your workspace". On the right: **Preview On / Preview Off**, **Revert**, **Reset** and **Save Changes**. A banner appears when you have unsaved work: "You have unsaved changes. Click "Save Changes" to persist your settings."

Three tabs:

Theme — **Theme Mode** (*Light, Dark, System*), **Font Size** (*Small, Medium, Large*), **Border Radius** (*Sharp, Subtle, Medium, Rounded*) and **Animations** with a switch and a little box of things to hover over.

Colors — **Color Presets** (Blue, Indigo, Purple, Teal, Green, Orange, Rose, Slate), **Custom Colors** with a **Primary Color** and an **Accent Color**, and a **Live Preview** of buttons, links and badges.

Layout — **Compact Mode**, **Collapsed Sidebar** and **Content Density** (*Comfortable, Default, Compact*).



Appearance on the Colors tab showing the preset swatches, the two custom colour pickers and the live preview

WHAT YOU CAN DO HERE

To change how Sankorra looks:

- 1 Pick your options on the three tabs. The screen changes as you go, because Preview is on.
- 2 Press **Save Changes**.

To undo:

- 1 Press **Revert** to go back to what was saved, or **Reset** to go back to Sankorra's own settings — then press **Save Changes**.

Good to know

- **This appears only if your subscription includes white-label appearance.** Otherwise you see "White-label Appearance Not Available".
- **These choices belong to the browser you are sitting at, not to your facility and not to your login.** Your colleagues will not see them, and neither will you on a different computer or phone.
- Preview is on from the start, so the whole screen changes as soon as you pick something — before you save. If you leave without saving, reload the page to put it back.
- **Revert** and **Reset** only change what is on screen. You still have to press **Save Changes** afterwards, even though the message says the settings were reset.
- **Content Density** repeats what the **Compact Mode** switch above it does, and the *Comfortable* option has no visible effect. Use the **Compact Mode** switch instead.
- If you set a very pale **Primary Color**, button text may become hard to read, because the text on buttons is always white.

11.21 Login page

WHAT THIS SCREEN IS FOR

putting your own logo, background and wording on the page staff see when they sign in at your own web address.

HOW TO GET HERE

Settings → Login Page.

WHAT YOU SEE ON THE SCREEN

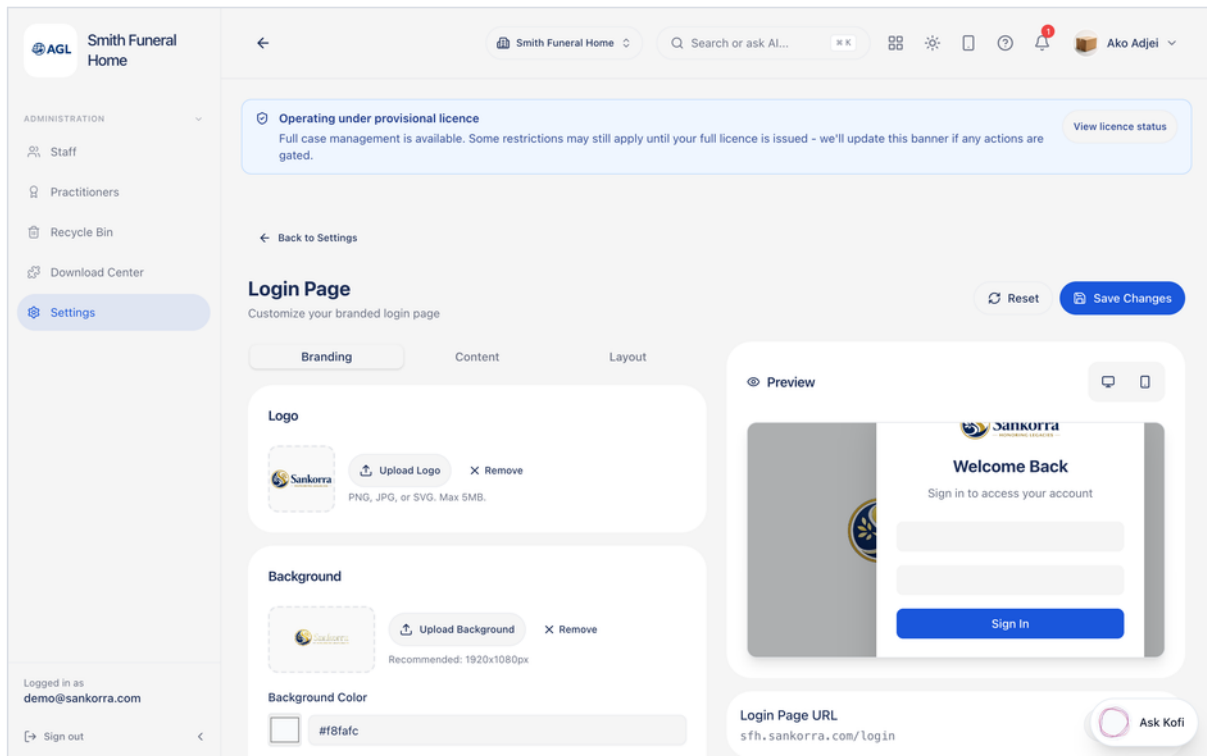
The heading **Login Page** with the line "Customize your branded login page", and **Reset** and **Save Changes** buttons. Three tabs on the left and a live preview on the right.

Branding — the card **Logo** with **Upload Logo**, **Remove** and the note "PNG, JPG, or SVG. Max 5MB." Then **Background** with **Upload Background**, **Remove**, the note "Recommended: 1920x1080px", a **Background Color** and an **Overlay Opacity** slider. Then **Colors** with **Primary Button Color**.

Content — the card **Messaging** with **Headline** and **Subheadline**; and **Display Options** with the switches **Show Facility Name** and **Show "Powered by SANKORRA"**.

Layout — **Form Position** (*Centered*, *Left Aligned*, *Right Aligned*) and **Custom CSS**.

On the right, a **Preview** card with a desktop and a mobile view, and below it your **Login Page URL** with a **View Live** button.



Login Page settings on the Branding tab with the logo and background cards and the preview panel on the right

WHAT YOU CAN DO HERE

To brand your login page:

- 1 Press **Upload Logo** and choose your logo. It is uploaded straight away.
- 2 Press **Upload Background** and choose a photograph if you want one, then set **Overlay Opacity** so your text stays readable over it.
- 3 Open **Content** and type a **Headline** and a **Subheadline**.
- 4 Press **Save Changes**.
- 5 Press **View Live** to look at the real page.

Good to know

- **This appears only if your subscription includes branded login.** Otherwise you see "Branded Login Not Available".
- **Only four things on this screen actually change the real login page:** the **Logo**, the **Background** image, the **Overlay Opacity**, and the **Headline** and **Subheadline**. **Form Position, Background Color, Primary Button Color, Show Facility Name, Show "Powered by SANKORRA"** and **Custom CSS** are saved but have no effect on the page your staff see. Do not spend time on them.
- The preview is a guide, not a copy. In particular your **Headline** and **Subheadline** appear beside the sign-in form on the real page, not above it, and the real footer reads "Powered by ISP GHANA & MODULARPATH SYSTEMS" whatever the **Show "Powered by SANKORRA"** switch says.
- Your logo only shows when the visitor is on **your own web address**. If you press **View Live** from an ordinary Sankorra address you may see no branding at all.
- An image must be **5MB or less**. Uploading a new one **replaces the old one immediately and permanently** with no confirmation. Keep your own copies.
- Pressing **Remove** only clears the field on screen — it is not saved until you press **Save Changes**.
- **Reset** wipes every setting on the page back to the defaults with no confirmation. The message reminds you to save.
- Only owners and admins can save. Anybody else can fill in the whole form and then get an error.

11.22 Custom domains

WHAT THIS SCREEN IS FOR

putting Sankorra on your own web address, such as app.yourfacility.com, instead of the Sankorra one.

HOW TO GET HERE

Settings → Custom Domains.

WHAT YOU SEE ON THE SCREEN

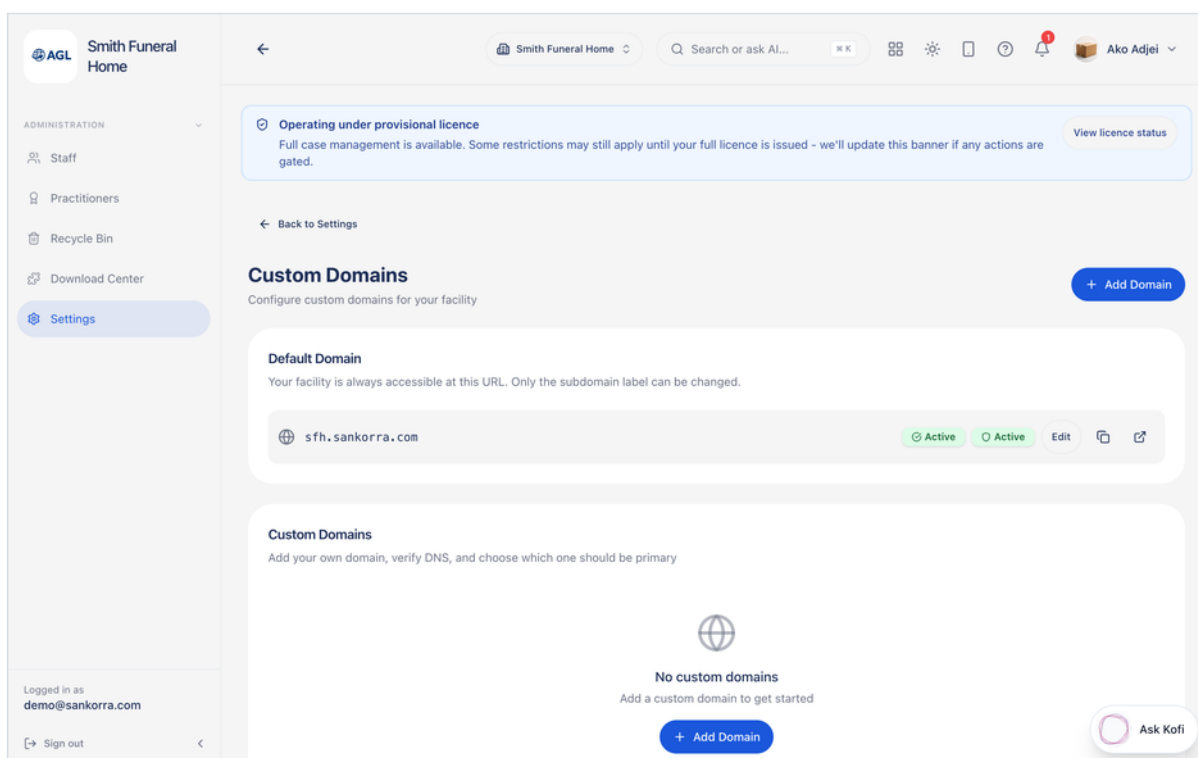
The heading **Custom Domains** with the line "Configure custom domains for your facility", and an **Add Domain** button.

The card **Default Domain** — "Your facility is always accessible at this URL. Only the subdomain label can be changed." It shows your address, for example peacefuneral.sankorra.com, with a status badge and an SSL badge, plus copy and open buttons and, for owners and admins, an **Edit** button.

The card **Custom Domains** — "Add your own domain, verify DNS, and choose which one should be primary", with the columns **Domain**, **Status**, **SSL**, **Added** and **Actions**. Each row can have a **Verify** button, a **Set Primary** button and a bin. A domain that is in use carries a **Primary** badge. When you have none you see "No custom domains".

Status	What it means
Pending	Added, nothing checked yet
Verifying	Still being checked
Active	Live and working
Failed	A problem was reported
Suspended	Switched off

The SSL column reads **Active**, **Pending** or **Needs attention**.



Custom Domains showing the Default Domain card and the custom domains table with a Pending row and its Verify button

WHAT YOU CAN DO HERE

To add your own web address:

- 1 Press **Add Domain**.
- 2 Type the full address in **Domain**, for example app.yourfacility.com.
- 3 Press **Add Domain**. The **Verify Domain** window opens by itself and starts checking.
- 4 Under **Add these DNS records**: you will see a **CNAME record** with a **Host** and a **Target**, and a **TXT verification record** with a **Host** and a **Value**. Each has a copy button.
- 5 Give those records to whoever manages your web address, or add them yourself in your domain provider's control panel.
- 6 Come back and press **Check Verification**.
- 7 When it succeeds you see a green panel headed **Domain verified**: "DNS ownership checks passed. SSL provisioning will continue automatically."

To make a verified domain the one families and staff use:

- 1 Press **Set Primary** on its row.

To change the Sankorra address itself:

- 1 Press **Edit** on the **Default Domain** card.
- 2 Change only the part before ".sankorra.com". Use lowercase letters, numbers and hyphens, between 3 and 63 characters.
- 3 Press **Save**.

Good to know

- **This appears only if your subscription includes custom domains.** Otherwise you see "Custom Domains Not Available".
- **Changing the default subdomain changes your address for everybody.** The old address stops working — bookmarks, your storefront link and your branded login page link all break. There is no confirmation and no warning on the screen. Tell your team before you do it.
- Some names are not allowed: www, app, platform, api and admin. You will be told if the name is already taken.
- **The bin deletes a domain immediately, with no confirmation.** If it was live, sign-in stops working on that address at once. To get it back you must add it and verify it again.
- Web address changes take time to spread across the internet. The screen says so: "DNS changes can take time to propagate. Some DNS providers expect a relative host label instead of the full hostname, so use your provider's format if needed and then run verification here."
- While a domain is being set up the page keeps checking on its own. Do not press **Check Verification** over and over — the check is rate-limited and you will start seeing confusing errors.
- Some of the messages on this screen come straight from the internet company that runs the addresses, so they can look very technical. If one stops you, copy it and send it to support.
- If you are a manager or staff member you may see the page half-empty, with no badges and no rows. That is because you are not allowed to see them; the buttons will fail if you press them.

11.23 Document templates

WHAT THIS SCREEN IS FOR

putting your logo, colours and standard wording on the invoices, receipts and other documents Sankorra produces, and holding your bank details for the payment instructions printed on them.

HOW TO GET HERE

Settings → Documents.

WHAT YOU SEE ON THE SCREEN

The heading **Document Settings** with the line "Customize how your invoices, receipts, and other documents look", and three tabs: **Branding**, **Invoice Settings** and **Preview**.

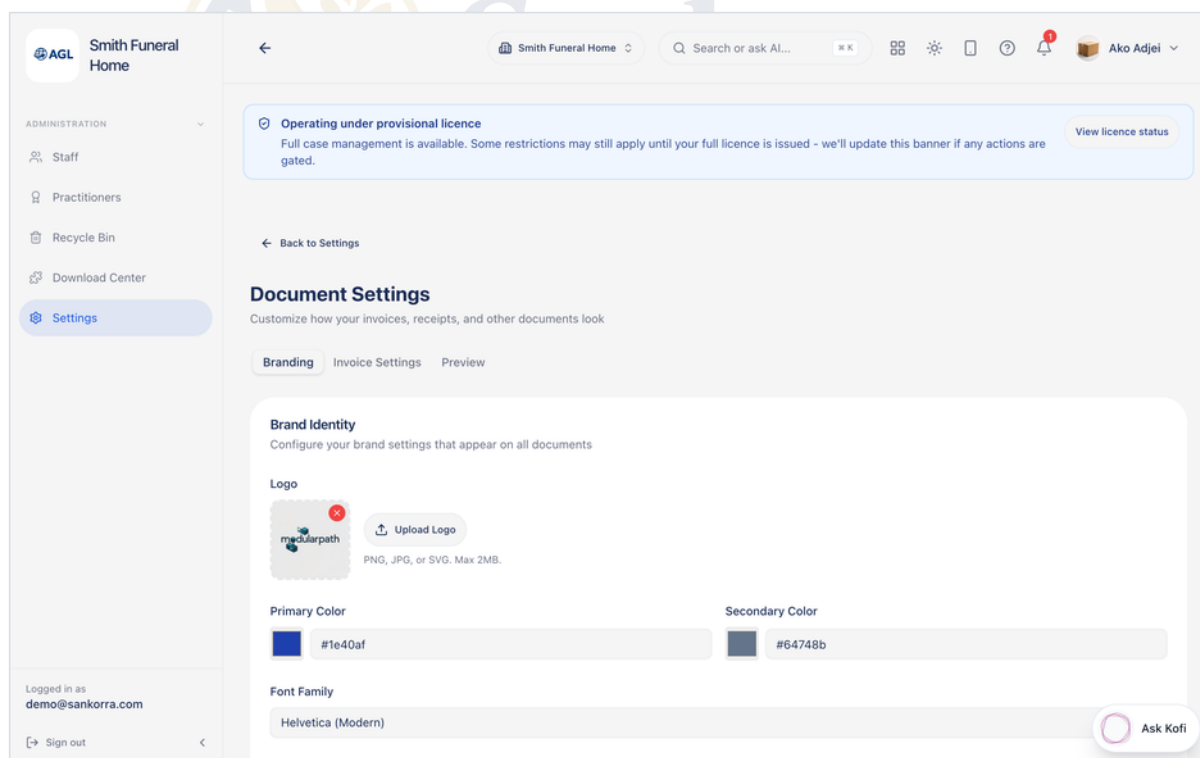
Branding — the card **Brand Identity** with a **Logo** upload, **Primary Color**, **Secondary Color**, **Font Family**, **Header Text** and **Footer Text**.

Invoice Settings — four cards:

- **Document Workflow** — the switch **Require Document Verification**: "When enabled, uploaded documents will require manual verification before being marked as verified. When disabled, documents are automatically verified on upload."
- **Display Settings** — "Configure what information appears on your documents", with switches for **Show Logo**, **Show Address**, **Show Phone**, **Show Email**, **Show Website**, **Show VAT Number**, **Show Page Numbers** and **Show Generated Date**.
- **Invoice & Receipt Settings** — **Payment Terms** and **Thank You Message**.
- Bank details — **Bank Name**, **Branch**, **Account Name**, **Account Number**, **Sort Code / Routing Number** and **SWIFT / BIC Code**.

Then a **Save All Settings** button, and a card **Export & Import** with **Export Settings** and **Import Settings**.

Preview — the card **Document Preview** showing a mock **Invoice** and a mock **Receipt** with your branding applied.



Document Settings on the Invoice Settings tab showing Display Settings switches and the bank details fields

WHAT YOU CAN DO HERE

To brand your documents:

- 1 On **Branding**, upload your **Logo** and set your two colours and font.

- 2 Type any **Header Text** and **Footer Text** you want on every document.
- 3 Press **Save All Settings**.
- 4 Open **Preview** to check the result.

To add your bank details to invoices:

- 1 On **Invoice Settings**, fill in the bank fields.
- 2 Type your standard **Payment Terms**, for example "Payment is due within 30 days of invoice date."
- 3 Press **Save All Settings**.

To keep a copy of your settings:

- 1 Press **Export Settings**. A file is downloaded.
- 2 To put them back, press **Import Settings** and choose that file.

Good to know

- **This appears only on plans that include document customisation.** Otherwise you see a padlocked panel headed **Document Customization** with an **Upgrade Plan** button.
- A logo for documents must be a PNG, JPG or SVG file and **under 2MB** — smaller than the 5MB allowed elsewhere.
- **Require Document Verification** changes how your staff work. With it on, somebody has to check each uploaded document before it counts as verified; with it off, documents count as verified the moment they are uploaded.
- **Show VAT Number** only prints something if you have entered a VAT registration number on the Facility screen (11.8).
- Deleting a template asks you to confirm and warns that it cannot be undone. You cannot delete the default template — make another one the default first.

11.24 AI features

WHAT THIS SCREEN IS FOR

switching Sankorra's AI helpers on or off and setting how cautious they are.

HOW TO GET HERE

Settings → AI Features.

WHAT YOU SEE ON THE SCREEN

The heading **AI Features** with the line "Configure AI-powered automation and suggestions".

At the top, one card with a big switch and the heading **AI Features**. This is the master switch. When it is off a panel appears headed **AI Is Turned Off**: "Individual feature switches and preferences are still saved here, but none of them will run until the master AI switch is enabled."

When it is on, a panel headed **AI Usage This Month** shows how many requests you have used out of your allowance, with a bar.

Then two counts, **Features Available** and **Coming Soon**, and three tabs.

Features — a switch for each helper, grouped, and each one telling you where it appears:

Helper	Where you find it
AI Workflow Builder	Workflows → Edit → the AI button
Case Summary Generation	A case → Generate Summary
Smart Condition Suggestions	The workflow editor's AI Assistant
Action Recommendations	The workflow editor's AI Assistant
Workflow Optimization	The workflow editor's AI Assistant → Optimize
AI Chat Assistant	The floating chat button, bottom right
AI-Powered Search	The header search bar
AI Analytics & Insights	Dashboard → AI Insights panel
AI Report Generation	Reports → Generate AI Summary

Helpers marked **Coming Soon** cannot be switched on; instead you can register your interest.

Settings — the card **AI Model Configuration** with **AI Model** (*Fast, Balanced, Accurate*), a **Confidence Threshold** slider from 50% to 95% ("AI suggestions with confidence below this threshold will require manual review") and the switch **Auto-approve High Confidence**. A **Save Settings** button sits under them. Then the card **Data & Privacy**.

Usage History — a list of what the AI has been asked to do.

The screenshot shows the 'AI Features' settings page in the Sankorra Facility Dashboard. The page is titled 'AI Features' and includes a 'Back to Settings' link. A banner at the top states 'Operating under provisional licence' with a 'View licence status' link. The main section shows 'AI Features' are enabled for the facility. Below this, a progress bar indicates 'AI Usage This Month' with 119 / 500 requests used and 381 remaining. Two summary cards show '9 Features Available' and '1 Coming Soon'. The 'Features' tab is selected, showing a list of AI helpers: 'AI Workflow Builder' (Available, toggle on) and 'Case Summary Generation' (Available, toggle on). Each helper has a 'Find it' link. The 'Automation' section is also visible at the bottom.

AI Features showing the master switch on, the usage bar, and the Features tab with switches for each helper

WHAT YOU CAN DO HERE

To switch AI on:

- 1 Press the big switch at the top. It saves immediately.

To switch one helper on or off:

- 1 Find it on the **Features** tab and press its switch. It saves immediately.

To change how cautious the AI is:

- 1 Open **Settings**.
- 2 Choose an **AI Model**.
- 3 Drag **Confidence Threshold**. Anything the AI is less sure of than this will wait for somebody to approve it.
- 4 Switch **Auto-approve High Confidence** on only if you want suggestions above 95% confidence applied without review.
- 5 Press **Save Settings**.

To ask for a Coming Soon helper:

- 1 Press its request button, add a note about how you would use it, and submit.

Good to know

- **This appears only if your subscription includes AI features.** Otherwise you see "AI Features Not Available".
- **The master switch overrules everything.** The individual switches are still saved while it is off, but nothing runs.
- You have a **monthly request allowance**. Keep an eye on the bar — when it runs out the helpers stop until the next month.
- The master switch and each helper's switch save the moment you press them. The **Settings** tab needs its own **Save Settings** button.
- **Auto-approve High Confidence** means the AI changes things without anybody looking. Leave it off unless you have a clear reason.

11.25 Integrations

WHAT THIS SCREEN IS FOR

connecting Sankorra to systems outside it, and registering the institutional exchanges the regulator wants to see. It is also where you can use your own email or text-message account instead of Sankorra's.

HOW TO GET HERE

Settings → Integrations.

WHAT YOU SEE ON THE SCREEN

The heading **Integrations** with the line "Set up API, webhook, and external- system connectivity for your facility." On the right, **Add Registration** and **Communications**.

A blue panel headed **What this page means now** explains: "Integrations now refers to external connectivity: APIs, inbound and outbound webhooks, and future partner exchange registrations. SMS and email channel controls have moved to Communications."

Four counts: **API access**, **Webhook surfaces**, **Messaging channels** and **Exchange registrations**.

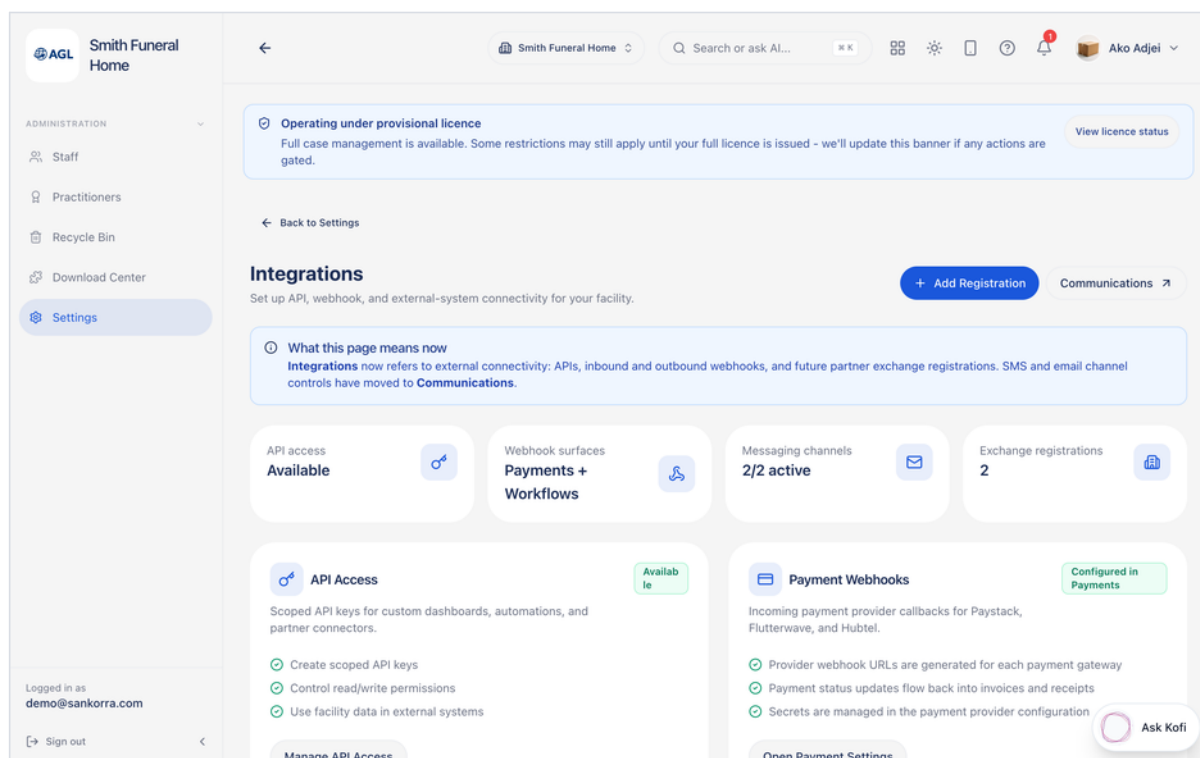
Then four capability cards, each with a status badge and a button:

- **API Access** — "Scoped API keys for custom dashboards, automations, and partner connectors", with **Manage API Access**.
- **Payment Webhooks** — "Incoming payment provider callbacks for Paystack, Flutterwave, and Hubtel", badged **Configured in Payments**, with **Open Payment Settings**.
- **Workflow Webhooks** — "Outbound calls to external systems from workflow transitions and automation rules", badged **Configured in Workflows**, with **Open Workflow Builder**.
- **Communications Channels** — "Platform-managed SMS and email delivery used by the facility", with **Open Communications**.

For owners and admins only, two more cards:

- **Email provider** — use your own Resend, SendGrid or Mailgun account. Fields: **Provider**, **From email**, **From name**, **Reply-to (optional)**, **Mailgun domain** (Mailgun only) and **API key**, with the switch **Use my own provider**, and **Save** and **Revert to platform** buttons.
- **SMS provider** — use your own Arkesel, Africa's Talking, Termii or Twilio account. Fields: **Provider**, **Sender ID** (or **Account SID** and **From number** for Twilio), **Username** (Africa's Talking only) and **API key** (or **Auth token** for Twilio), with the same switch and buttons.

Finally, the **Exchange Registry** card with a **New Registration** button and four counts, three exchange tiles (**Hospital Exchange**, **Law Enforcement Exchange**, **Public Health Reporting**), and **Current Facility Registrations** listing what you have on file, each with **Edit** and **Submit for Review**.



Integrations showing the four capability cards, the Email provider card and the Exchange Registry

WHAT YOU CAN DO HERE

To send email from your own account instead of Sankorra's:

- 1 Find the **Email provider** card.
- 2 Choose your **Provider**.
- 3 Fill in **From email**, **From name** and, if you use Mailgun, the **Mailgun domain**.
- 4 Type your **API key**.
- 5 Switch **Use my own provider** on.
- 6 Press **Save**.

To go back to Sankorra's email:

- 1 Press **Revert to platform**.
- 2 Press OK on the message "Remove your custom email provider and revert to the platform default?"

To register an institutional exchange:

- 1 Press **Add Registration** or **New Registration**.
- 2 Fill in the partner, the technical details, the capabilities and who owns the contact.
- 3 Save it. It starts as a draft.
- 4 When it is ready, press **Submit for Review** on its row.

Good to know

- **This appears only if your subscription includes integrations.** Otherwise you see "Integrations Not Available".
- **Your API key is stored securely and never shown again after saving.** Keep your own copy. If you save the email card with the key box empty after it has been stored, the stored key is kept — the box shows dots to tell you so.
- Make sure the domain in your **From email** is verified in your provider's own account, or email will simply fail to arrive. The card says so.
- A **Sender ID** for text messages can be at most 11 characters, and not all networks support custom sender names.
- Only owners and admins see the two provider cards at all. Managers can work with the Exchange Registry but not the providers.
- **Submit for Review** makes the registration visible to the regulator, and it does not ask you to confirm. Check the details first.
- If you are not an owner, admin or manager you see a panel headed **Read-only for your role**.

11.26 API access

WHAT THIS SCREEN IS FOR

creating keys so another system can read your facility's information.

HOW TO GET HERE

Settings → API Access.

WHAT YOU SEE ON THE SCREEN

The heading **API Settings** with the line "Manage API keys for external integrations and custom dashboards", and a **Create API Key** button.

Three counts: **Active API Keys**, **Total API Requests** and **Available Scopes**.

Three tabs:

API Keys — the card **Your API Keys** with a table: **Name**, **Key**, **Scopes**, **Last Used**, **Status** and **Actions**. Status reads *active*, *expired* or *revoked*.

Usage & Logs — how many requests each key has made, and a **Rate Limits** panel showing 60 requests per minute and 10,000 per day.

Documentation — the card **API Documentation** with a quick-start example, how to authenticate and a list of available addresses.

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

[Back to Settings](#)

API Settings

Manage API keys for external integrations and custom dashboards [+ Create API Key](#)

2 Active API Keys

68,813 Total API Requests

11 Available Scopes

API Keys Usage & Logs Documentation

Your API Keys
Manage your API keys and their permissions. Keep your keys secure and never share them publicly.

Name	Key	Scopes	Last Used	Status	Actions
Dashboard Integration Created Jan 15, 2024	sk_demo_abc1...o345	cases billing +1	Feb 12, 2024	active	
Mobile App Created Feb 1, 2024	sk_demo_xyz7...l345	cases cases +1	Feb 13, 2024	active	
Legacy System Created Jun 1, 2023	sk_demo_old1...l345	cases	Dec 28, 2023	expired	

[Ask Kofi](#)

API Settings on the API Keys tab with the key table and the Create API Key button

WHAT YOU CAN DO HERE

To create a key:

- 1 Press **Create API Key**.
- 2 Type a **Key Name**, for example "Dashboard Integration".
- 3 Choose an **Expiration** — 30 days, 90 days, 1 year or Never expires.
- 4 Tick the **Permissions** you want. The buttons **All Read**, **All Write** and **Select All** help. At least one is required.
- 5 Press **Create API Key**.
- 6 Copy the key from the green panel straight away.

To withdraw a key:

- 1 Press the bin on its row.
- 2 Read the dialog headed **Revoke API Key?** — it warns that "any applications using this key will immediately lose access."
- 3 Press **Revoke Key**.

Good to know

- **This appears only if your subscription includes API access.** Otherwise you see "API Access Not Available".
- **This screen is a preview and is not yet connected to anything.** The three keys you see listed are examples, not keys anybody created. A key you create here is not really issued and disappears when you reload the page, and the request counts are made up. Do not build anything against it yet, and do not worry about the example keys — ask support when you actually need API access.
- The addresses shown on the **Documentation** tab are for that future service. The **View Full API Documentation** button does nothing at present.

11.27 Services

WHAT THIS SCREEN IS FOR

the list of services your facility offers and what each one costs. These are what staff pick when they build an invoice.

HOW TO GET HERE

Settings → Services.

WHAT YOU SEE ON THE SCREEN

The heading **Service Types** with the line "Configure the services your facility offers", and an **Add Service** button. Under it, **Filter by:** with a dropdown of your service categories.

Services are grouped under their category, with a count beside each group name. Each service card shows its name, its category, its price with a suffix such as /hr or /day, its description, a **Consent Required** badge where it applies, and on the right an on/off switch, a pencil and a red bin.

When you have none you see "No service types" with the line "Add service types to start building your pricing catalog."

The screenshot displays the 'Service Types' configuration page in the Sankorra Facility Dashboard. At the top, a banner states 'Operating under provisional licence' with a 'View licence status' link. Below this is a 'Back to Settings' link. The main section is titled 'Service Types' with the subtitle 'Configure the services your facility offers' and an 'Add Service' button. A 'Filter by: All Categories' dropdown is present. The services are grouped under the 'Standard Service' category (3 items):

- Transport (Hearse)**: Standard Service, GH¢600.00 /hr. Includes a toggle switch, edit icon, and delete icon.
- Open Embalming**: Standard Service, GH¢800.00. Includes a toggle switch, edit icon, delete icon, and a 'Consent Required' checkbox.
- Direct Embalming**: Standard Service, GH¢1,200.00. Includes a toggle switch, edit icon, and delete icon.

The left sidebar shows the user is logged in as 'demo@sankorra.com' and provides navigation links for Administration (Staff, Practitioners, Recycle Bin, Download Center, Settings). The bottom right corner has an 'Ask Kofi' button.

Service Types grouped by category, each card showing price, the active switch and the pencil and bin buttons

WHAT YOU CAN DO HERE

To add a service:

- 1 Press **Add Service**.
- 2 Type a **Service Name**, for example "Standard Embalming".
- 3 Choose a **Category**.
- 4 Choose a **Rate Type** — *Flat Rate, Hourly, Per Day or Per Unit*.
- 5 Type the price. The label changes with the rate type: **Base Price, Hourly Rate, Daily Rate** or **Unit Price**.
- 6 For Per Unit, type a **Unit Label** such as trip, km or session. It appears on invoices.
- 7 Type a **Description** if you want one.
- 8 If the family must agree before this service can start, switch **Family consent required** on and choose a **Consent form type** — *General Service Consent, Embalming Authorization or Autopsy Consent*.
- 9 Press **Add Service**.

To take a service out of use:

- 1 Press its switch to turn it off. It stays on the list but staff cannot pick it.

To delete a service:

- 1 Press the red bin.
- 2 Read the dialog headed **Delete Service** — "This action cannot be undone."
- 3 Press **Delete**.

Good to know

- **Deleting a service is permanent and it does not go to the Recycle Bin.** If you only want to stop using it, use the switch. Invoices that already use it are not affected either way.
- **Family consent required** is not just a label. Switching it on means the case cannot proceed with that service until the family has signed the consent form you chose.
- The grip handle on each card does nothing — the cards cannot be dragged into a different order.
- If the **Category** box looks empty on a new service, you have no category with the code the form expects. Create your categories first (11.28).

11.28 Lists that fill in the dropdowns

What these screens are for — six small screens that each control one dropdown your staff use. They all work the same way, so they are covered together.

Screen	The dropdown it controls
Service Categories	How your services and packages are grouped
Client Types	Client categories, and the discount each type gets
Case Service Types	The Service Type dropdown on Create New Case
Case Priorities	The Priority dropdown on Create New Case, and the badge colour on the cases list
Burial Types	The Burial Type dropdown when scheduling a burial
Storefront Categories	The category chips at the top of your public shop

HOW TO GET HERE

Settings → then the name of the list.

WHAT YOU SEE ON THE SCREEN

Each screen lists what is in the dropdown today. Depending on the screen this is a table or a set of cards, but the parts are the same: the label staff see, a short code, a description, its position in the order, and badges.

Two badges say where an entry came from: **Default** or **System** means Sankorra created it; **Custom** means you did. Two more say whether staff can pick it: **Visible** or **Hidden** (and on the storefront list, just **Hidden**).

On **Case Priorities** and **Burial Types** there is also a star in each row, reading **Default** or **Make default**, which sets what is pre-selected for new work. If none is set, an amber warning appears at the top telling you so.

Above the list, a counter such as "**3** of 5 types are visible on the Create New Case dropdown."

Each row has small buttons: an eye to hide or show, a pencil to edit, and a red bin.

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

[Back to Settings](#)

Settings > Case Priorities

Case Priorities

Priority levels that appear in the Priority dropdown on the Create New Case form, the badge colour on the cases list, and the data hook for any 'needs attention' surface. [+ Add Priority](#)

3 of 3 levels are visible on the Create New Case dropdown.

Order	Label	Preview	Default	Urgent	Type	Status	Actions
10	Normal normal Standard handling timeline.	NORMAL	★ Default	-	Default	Visible	Edit Delete
20	Urgent urgent Fast-track. Surfaces on the urgent-work strip.	URGENT	☆ Make default	Urgent	Default	Visible	Edit Delete
30	VIP vip High-visibility family or community leader. Extra...	VIP	☆ Make default	Urgent	Default	Visible	Edit Delete

Logged in as **demo@sankorra.com**

[Sign out](#)

[Ask Kofi](#)

Case Priorities showing the table with the Preview badges, the Default star, the Urgent badge and the Visible/Hidden status

WHAT YOU CAN DO HERE

To add something to a dropdown:

- 1 Press the **Add** button at the top right.
- 2 Type the **Label** — this is what staff will see.
- 3 Leave the slug blank and it is worked out for you.
- 4 Add a **Description** if it helps your staff.
- 5 Set the **Sort Order**. A lower number appears higher in the list.
- 6 On **Case Priorities**, also choose a **Badge colour** (Grey, Slate, Amber or Red) and decide whether it counts as urgent.
- 7 On **Client Types**, set a **Default Discount Type** (None, Percentage or Fixed Amount) and its value.
- 8 Press the save button on the dialog.

To take something off a dropdown without losing it:

- 1 Press the eye button on its row. It becomes **Hidden** and staff can no longer pick it. Anything that already uses it is untouched.

To make an entry the default:

- 1 Press the star in its row (Case Priorities and Burial Types only).

To change the order:

- 1 Edit the entry and change its **Sort Order**. On **Storefront Categories** you drag the handles instead.

Good to know

- **Hiding is nearly always what you want, not deleting.** Hiding takes the entry off the dropdown for new work and leaves everything that already uses it alone.
- **Deleting is permanent and does not go to the Recycle Bin.** Cases, burials and invoices that already use the entry keep the value as plain text, so nothing is lost on them — but you cannot get the entry itself back, and on the storefront list any items in that category fall through to the shop's "All items" view. On the confirmation dialog the button may simply read **Confirm**.
- On **Client Types**, deleting a type also removes every pricing rule attached to it, and **removing a single pricing rule does not ask you to confirm at all**.
- You cannot hide or delete the entry that is set as the **default**. Make something else the default first; the screen tells you "Pick a different default first, then you can hide this one."
- A slug cannot be changed after an entry is created, because existing cases, burials and invoices point at it.
- On **Client Types**, the inline **Save** in the pricing table only appears once you have changed something. If you type a value and move away without pressing it, the value is lost.
- The **Burial Types** screen appears even if your facility has no cemetery. You can ignore it.

11.29 Rate schedules and public rates

What these screens are for — two ways of setting prices beyond your ordinary service list. **Rate Schedules** changes prices for a period, such as a holiday season. **Public Rates** is the price list families see on the mobile app.

HOW TO GET HERE

Settings → Rate Schedules, or Settings → Public Rates.

WHAT YOU SEE ON THE SCREEN

Rate Schedules — the heading **Rate Schedules** with "Manage time-based pricing adjustments" and an **Add Schedule** button. The table columns are **Name**, **Applies To**, **Adjustment**, **Effective Period**, **Priority**, **Status**, **Active** and **Actions**.

Status	What it means
Active	Running now
Upcoming	Starts on a future date
Expired	Its end date has passed
Inactive	Switched off by you

Public Rates — the heading **Public Rate Cards** with "Configure rates visible to customers on the mobile app" and an **Add Rate** button. The rates are grouped under **Funeral Home**, **Morgue**, **Hearse**, **Cemetery**, **Cremation & Burial**, **Memorials**, **Grave Reservation** and **Reinterment**. Each card shows the rate name, a coloured rate-type badge (*Per Hour*, *Per Day*,

Per Service, Per Unit, Flat Rate), the price, a description, what it includes, and a switch, pencil and bin.

Smith Funeral Home

ADMINISTRATION

- Staff
- Practitioners
- Recycle Bin
- Download Center
- Settings

Operating under provisional licence
Full case management is available. Some restrictions may still apply until your full licence is issued - we'll update this banner if any actions are gated. [View licence status](#)

[Back to Settings](#)

Rate Schedules

Manage time-based pricing adjustments [+ Add Schedule](#)

Name	Applies To	Adjustment	Effective Period	Priority	Status	Active	Actions
Funeral Bundle	All	-10%	May 16, 2026 - Jun 25, 2026	0	Expired	☒	Edit Delete

Logged in as **demo@sankorra.com**

[Sign out](#)

[Ask Kofi](#)

Rate Schedules table with rows in Active, Upcoming and Expired status and the Active switches

WHAT YOU CAN DO HERE

To run a seasonal price:

- 1 On **Rate Schedules**, press **Add Schedule**.
- 2 Type a **Name**, for example "Holiday Season Pricing".
- 3 Choose **Applies To** — *All Services, Specific Service or Specific Package* — and pick the service or package if you chose one.
- 4 Choose an **Adjustment Type** — *Fixed Price, % Increase, % Decrease, Fixed Increase or Fixed Decrease* — and type the **Adjustment Value**.
- 5 Set **Effective From**. Leave **Effective To** empty for no end date.
- 6 Set a **Priority**. Where two schedules overlap, the higher priority wins.
- 7 Press **Add Schedule**.

To publish a price to the mobile app:

- 1 On **Public Rates**, press **Add Rate**.
- 2 Choose a **Service Category** and a **Rate Type**.
- 3 Type a **Rate Name**, for example "Standard Morgue Storage".
- 4 Leave **Client Type** as "all" unless the rate is only for one kind of client.
- 5 Type the **Amount**. Enter the amount **before tax** — government taxes are added on the family's final invoice, so the published rate is shown to families as tax-exclusive.
- 6 Add a **Description** and anything it **Includes**.

7 Press **Add Rate Card**.

Good to know

- **Deleting either a rate schedule or a public rate card is permanent** and does not go to the Recycle Bin. To stop using one, use its switch instead.
- A rate schedule row can read **Expired** while its **Active** switch is still on. The status is what counts: an expired schedule no longer applies. Switch it off to keep the list tidy.
- Nothing checks that **Effective To** is after **Effective From**, or warns you about two schedules that overlap. Use **Priority** deliberately.
- On **Public Rates**, **Client Type** is typed in by hand, not picked from your Client Types list. If you mistype it the rate will match nobody. Leave it as "all" unless you are certain.
- A public rate card's currency cannot be changed after it is created.

11.30 Release checklist

WHAT THIS SCREEN IS FOR

the list of things that must be ticked off before a body can be released, and the groups those things fall into.

HOW TO GET HERE

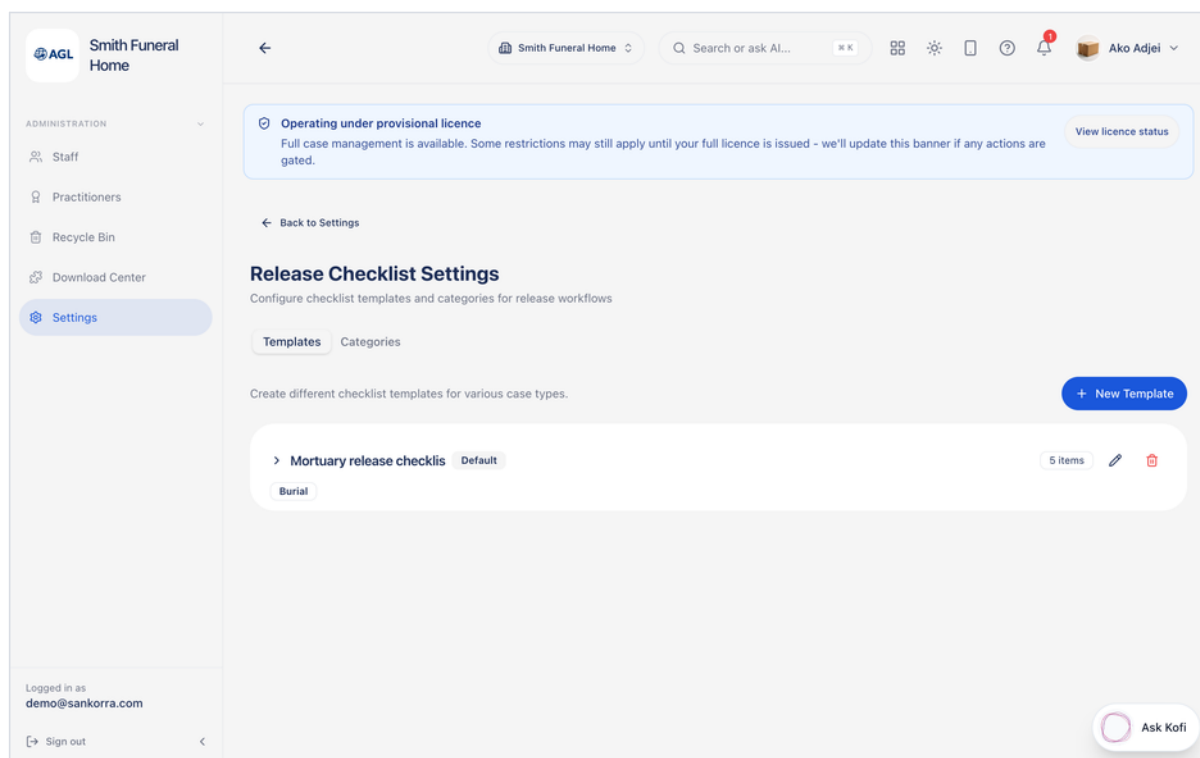
Settings → Release Checklist.

WHAT YOU SEE ON THE SCREEN

The heading **Release Checklist Settings** with the line "Configure checklist templates and categories for release workflows", and two tabs: **Templates** and **Categories**. —

Templates — "Create different checklist templates for various case types", with a **New Template** button. Each template card shows its name, a **Default** badge if it is the one normally used, how many items it has, which case types it applies to, and a pencil and bin. Expanding it lists the items, each with its label, a **Required** badge where it applies, its category, and an **Add Item** button at the bottom.

Categories — "Categories help organize checklist items into logical groups", with a **New Category** button.



Release Checklist Settings on the Templates tab with one template expanded showing its items and Required badges

WHAT YOU CAN DO HERE

To create a checklist:

- 1 Press **New Template**.
- 2 Type a **Name**, for example "Burial Release Checklist".
- 3 Add a **Description** if you want one.
- 4 Under **Case Types**, press the types this checklist is for — **Burial**, **Cremation**, **Transfer**, **Direct Burial**, **Direct Cremation** or **Memorial**. Leave them all unpressed for every type.
- 5 Tick **Set as default template** if this should be the usual one.
- 6 Press **Create**.

To add an item to a checklist:

- 1 Expand the template and press **Add Item**.
- 2 Type a **Label**, for example "Death certificate obtained".
- 3 Add a **Description (optional)** to help staff.
- 4 Choose a **Category**, or leave it as **No category**.
- 5 Tick **Required (blocks release if unchecked)** if the release must not happen without it.
- 6 Press **Add**.

To create a category:

- 1 Open **Categories** and press **New Category**.
- 2 Type a **Name**, for example "Documentation".
- 3 Choose a **Color**.

4 Press **Create**.

Good to know

- Items marked **Required** genuinely block a release until they are ticked. Items not marked Required are guidance only.
- **Deleting a checklist item does not ask you to confirm** — the bin removes it at once.
- The edit and delete buttons on an item only appear when you hover the mouse over its row. On a phone or tablet they are always visible.
- The confirmation for deleting a template says "This action cannot be undone". In practice the template is hidden rather than destroyed, but **there is no way to bring it back from this screen**, so treat it as permanent.
- Deleting a category leaves the items that used it pointing at a category you can no longer see, even though the message says they will become uncategorised. Move the items to another category first.
- The grip handles on items do nothing — items cannot be dragged into a different order.

11.31 Embalming and clearance requirements

What these screens are for — two short screens that each set a hard condition your staff cannot work around. **Embalming** lists the documents that must be on file before embalming can be authorised. **Clearance Requirements** lists the police or coroner clearances that must be issued before a case can be released.

HOW TO GET HERE

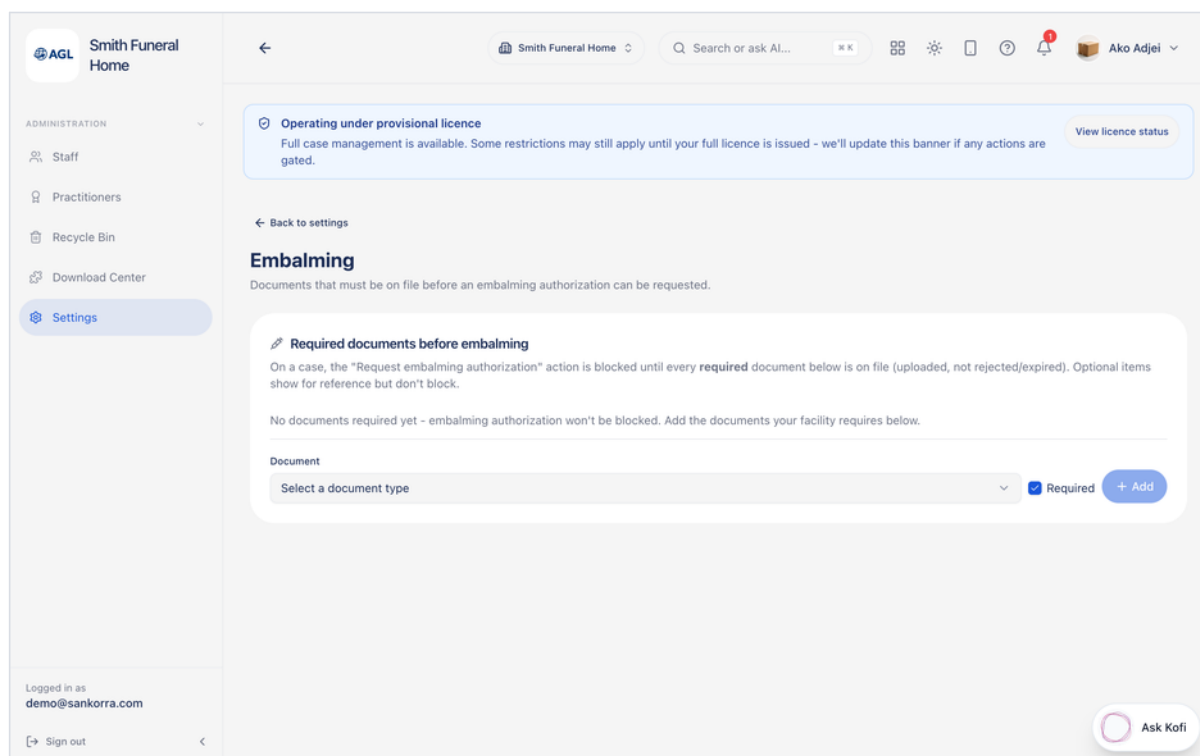
Settings → Embalming, or Settings → Clearance Requirements.

WHAT YOU SEE ON THE SCREEN

Embalming — the heading **Embalming** with "Documents that must be on file before an embalming authorization can be requested." The card **Required documents before embalming** explains that on a case, the "Request embalming authorization" action is blocked until every **required** document below is on file — uploaded, and not rejected or expired. Optional items are shown for reference but do not block. Each row is a document name with a **Required** tick box and a bin. At the bottom, a **Document** dropdown, a **Required** tick box and an **Add** button.

When the list is empty you see: "No documents required yet - embalming authorization won't be blocked. Add the documents your facility requires below."

Clearance Requirements — the heading **Clearance requirements** with "Which police / coroner clearances must be issued before a case can be released." The card **Required clearances before release** explains that a case cannot be released until an **issued** clearance of each required type is on file for it, and there is no active evidence hold. Each row is a clearance name with a bin. At the bottom, a **Clearance type** dropdown (*Release, Burial, Cremation, Exhumation, General*) and an **Add** button.



The Embalming screen showing three required documents with their Required tick boxes and the Add row below

WHAT YOU CAN DO HERE

To require a document before embalming:

- 1 Choose the document from the **Document** dropdown.
- 2 Tick **Required** if it must block, or leave it clear to list it for reference.
- 3 Press **Add**.

To require a clearance before release:

- 1 Choose a type from the **Clearance type** dropdown.
- 2 Press **Add**.

To remove a requirement:

- 1 Press the bin on its row.

Good to know

- **The bin removes a requirement immediately, with no confirmation and no way back.** On these two screens that is more serious than usual, because you are removing a hard safety check on a regulated step. Be careful where you press.
- On **Embalming**, the **Required** tick box is what makes a document block. Untick it and the document is only listed for reference.
- An empty list means nothing is blocked at all.
- Once every document type has been added, the dropdown shows "All document types added" and nothing more can be chosen.
- The clearance rule is enforced at the point of release. If your staff find they can release a case that you expected to be blocked, contact support before changing this screen.

11.32 Case transfers

WHAT THIS SCREEN IS FOR

the rules for handing a case to another facility, and for receiving one.

HOW TO GET HERE

Settings → Case Transfers.

WHAT YOU SEE ON THE SCREEN

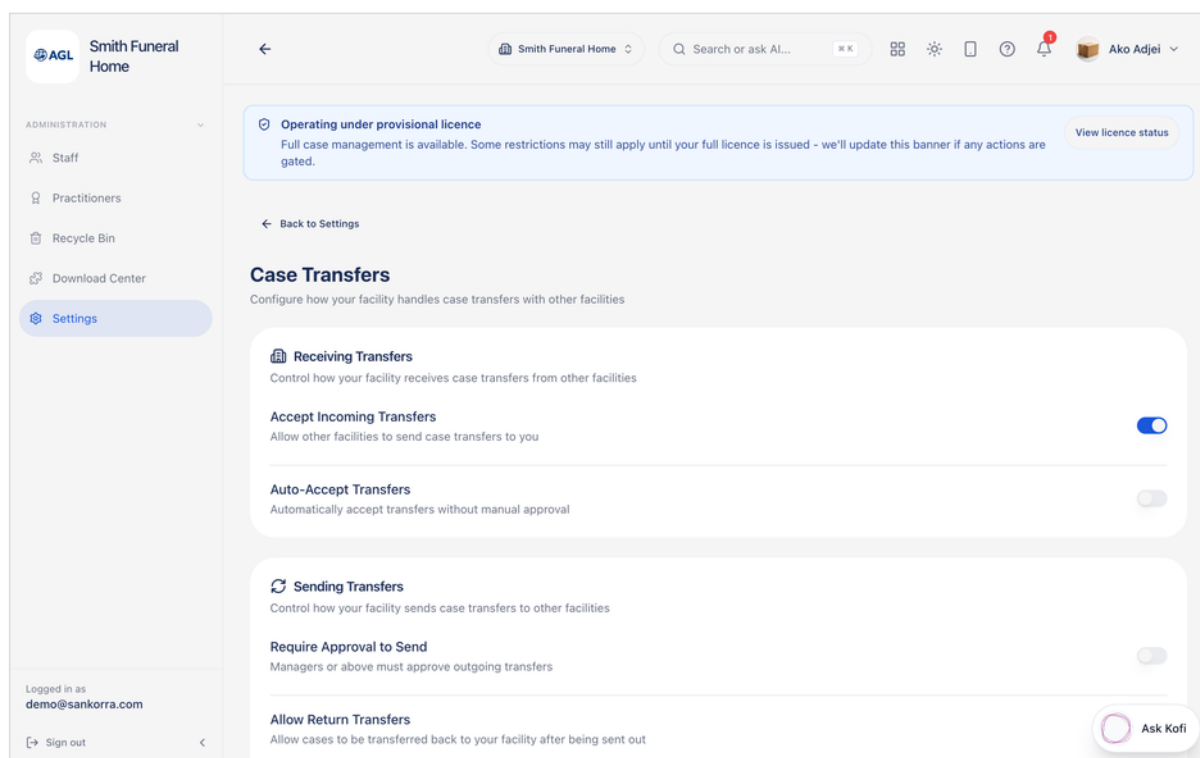
The heading **Case Transfers** with the line "Configure how your facility handles case transfers with other facilities", and four cards.

Receiving Transfers — "Control how your facility receives case transfers from other facilities." Switches: **Accept Incoming Transfers**, **Auto-Accept Transfers**, then **Trusted Facilities** with a search box and the note "Auto-accept transfers only from these facilities. Leave empty to auto-accept from all facilities."

Sending Transfers — switches **Require Approval to Send** ("Managers or above must approve outgoing transfers"), **Allow Return Transfers** and **Allow Partial Handoffs** ("Allow sharing case responsibility between multiple facilities (e.g., preparation at one facility, service at another)").

Transfer Content — "Choose what data to include when transferring cases", with tick boxes **Include Documents**, **Include Audit History** and **Include Financial Records**.

Permissions — "Control who can initiate and approve transfers", with two rows of role badges under **Who can initiate transfers?** and **Who can approve incoming transfers?** A filled badge means the role is allowed.



Case Transfers showing all four cards with their switches, tick boxes and role badges

WHAT YOU CAN DO HERE

To accept transfers from other facilities:

- 1 Switch **Accept Incoming Transfers** on.
- 2 If you want them accepted without anybody approving, switch **Auto-Accept Transfers** on as well.
- 3 To limit auto-accept to facilities you know, search for each one and add it under **Trusted Facilities**.

To decide who may send a case out:

- 1 In **Permissions**, press the role badges under **Who can initiate transfers?** until only the roles you want are filled in.

Good to know

- **There is no Save button on this screen. Every switch, tick box and badge saves the moment you press it.**
- **There is also no confirmation that it saved, and no message if it fails.** If you are not an owner or admin, the switch will appear to move but nothing will have been stored. Check the page again after reloading it.
- Trusted facilities are shown as short codes rather than names, so add them carefully — and note that pressing one **removes** it, with no confirmation.
- Leaving **Trusted Facilities** empty means auto-accept applies to **every** facility, not none.
- Nothing stops you from emptying both lists under **Permissions**, which would leave nobody able to send or approve a transfer. Always leave at least Owner in each.

11.33 Removal settings

WHAT THIS SCREEN IS FOR

how the at-need removal workflow behaves: whether the driver is texted automatically, whether removals may be cancelled, whether removals are billed, the wording on the field report, and your list of outside transport providers.

HOW TO GET HERE

Settings → Removals, or Removals → settings.

WHAT YOU SEE ON THE SCREEN

The heading **Removal settings** with the line "Control how the at-need removal workflow behaves at your facility", and a **Save** button at the top.

Dispatch — the switch **Auto-SMS driver on dispatch**: "When on, dispatching a removal automatically sends the driver an SMS with a Google Maps navigation link. When off, the dispatcher gets a preview dialog to send it manually."

Cancellation — the switch **Allow cancellation**: "When off, the Cancel button is hidden on the removal detail page and the RPC rejects any attempt." Under it,

Allowed cancellation reasons — "Staff can only cancel using one of these reasons" — a list with bins, a box to add a reason and an **Add** button. If the list is empty, a red warning reads "At least one reason is required, otherwise no one can cancel."

Billing — **Billable service type for removals**, with a first option reading **Don't auto-bill removals**.

Field report declarations — two boxes, **Personal effects declaration** and **Removal declaration**, which are shown to the removal team and the family on the field report and signed separately.

Third-party transport providers — your saved hearse and transport companies, each with a name, phone and cost, an inline edit and a **Remove** link. Below, boxes for **Name**, **Phone** and **Cost** and an **Add** button.

The screenshot shows the 'Removal settings' page for 'Smith Funeral Home'. The left sidebar contains navigation links: ADMINISTRATION, Staff, Practitioners, Recycle Bin, Download Center, and Settings (highlighted). The main content area has a header with a search bar and user profile. Below this is a banner for 'Operating under provisional licence'. The 'Removal settings' section includes a 'Dispatch' card with a toggle for 'Auto-SMS driver on dispatch', a 'Cancellation' card with a toggle for 'Allow cancellation', and an 'Allowed cancellation reasons' section with a list of reasons and an 'Add' button. A 'Save' button is located at the top right of the settings section.

Removal settings showing the Dispatch and Cancellation cards with the reasons list, and the transport providers card

WHAT YOU CAN DO HERE

To let staff cancel a removal:

- 1 Switch **Allow cancellation** on.
- 2 Add at least one reason in the box and press **Add**. Add all the reasons your team actually sees, for example "Wrong address" or "Duplicate call".
- 3 Press **Save** at the top.

To bill for removals:

- 1 Choose a service from **Billable service type for removals**.
- 2 Press **Save**.

To add an outside hearse company:

- 1 Type its **Name**, **Phone** and **Cost** at the bottom of the transport providers card.
- 2 Press **Add**. This one saves straight away.

Good to know

- **The four configuration cards wait for the Save button at the top; the transport providers save themselves.** If you add a cancellation reason and leave the page without pressing **Save**, the reason is lost.
- If **Allow cancellation** is on but there are no reasons, nobody can cancel anything.
- You must create the service first, on the Services screen (11.27), before it can be chosen as the billable service for removals.
- **Remove** on a transport provider does not ask you to confirm. It hides the provider rather than destroying it, but there is no way to bring it back from this screen.
- If you see a long technical message when saving, you are probably not an owner or admin. Ask the owner.

11.34 Partners

WHAT THIS SCREEN IS FOR

registering the hospitals, police stations, coroners and registries you exchange the deceased with, and giving their staff a login to the partner portal.

HOW TO GET HERE

Settings → Partners.

WHAT YOU SEE ON THE SCREEN

The heading **Partners** with the line "Register the institutions you exchange the deceased with - hospitals, police, coroners, registries - and invite their staff to the partner portal."

The card **Register a partner** with **Type** (*Hospital, Law enforcement / Police, Public health, Coroner / Medical examiner, Births & Deaths Registry, Insurance, Laboratory, Other*), **Name**, **Town**, **Phone** and a **Register** button.

Then a card per partner, showing its name, a type badge, its town, and a **Not connected** badge where it applies. Each has a **Connect** button, or **Portal access** once it is connected.

Opening **Portal access** shows **Staff email**, **Name (optional)**, **Role** (*Coordinator, Pathologist, Admin*) and an **Invite** button, plus a list of the partner's portal users with their role, a badge reading **Active** or **Disabled**, when they last signed in, and a **Disable** or **Enable** button.

The screenshot shows the 'Partners' section of the Sankorra Facility Dashboard. At the top, there's a navigation bar with 'Smith Funeral Home' and a search bar. A sidebar on the left lists 'ADMINISTRATION' options: Staff, Practitioners, Recycle Bin, Download Center, and Settings (which is highlighted). A banner at the top of the main content area states 'Operating under provisional licence' with a 'View licence status' link. Below this is a 'Back to settings' link. The 'Partners' section title is followed by a description: 'Register the institutions you exchange the deceased with - hospitals, police, coroners, registries - and invite their staff to the partner portal.' There are two main cards: 'Register a partner' and a list of existing partners. The 'Register a partner' card has fields for 'Type' (dropdown menu with 'Hospital' selected), 'Name' (text input with 'e.g. Ghana Police Service - Accra Central'), 'Town' (text input), and 'Phone' (text input), followed by a '+ Register' button. The list of existing partners shows '37 Military Hospital' (Hospital - Accra) with a '+ Connect' button, and 'Smith Police Hospital' (Hospital - Accra) with a 'Portal access' button. At the bottom left, it says 'Logged in as demo@sankorra.com' with a 'Sign out' link. At the bottom right, there's an 'Ask Kofi' button.

The Partners screen showing the Register a partner card and one partner with its Portal access panel open

WHAT YOU CAN DO HERE

To register a partner:

- 1 Choose a **Type** and type the **Name** — for example "Ghana Police Service - Accra Central".
- 2 Add the **Town** and **Phone**.
- 3 Press **Register**.

To connect to a registered partner:

- 1 Press **Connect** on its card.

To give a partner's staff member access to the portal:

- 1 Press **Portal access** on the partner's card.
- 2 Type their **Staff email** and, if you like, their name.
- 3 Choose their **Role**.
- 4 Press **Invite**.

Good to know

- **Inviting somebody here gives a person outside your organisation access to case information, from a three-field form with no confirmation step.** Only invite people you have verified by phone or in person, and only with the role they need.
- If the invitation email cannot be sent you will see "Portal user added (invite email couldn't be sent)". That message looks like a success but nobody has been emailed — contact them another way.
- **There is no way to delete a partner or a portal user, only to disable them.** Use **Disable** when somebody leaves that organisation.
- Pressing **Connect** more than once on the same partner may create a second copy of it in your list. Press it once and wait.
- This screen has no role gate of its own. Anybody who knows the address can reach it, so check the portal user lists from time to time.

11.35 Data import

WHAT THIS SCREEN IS FOR

bringing records you already hold, in a spreadsheet, into Sankorra: clients, cases, cemetery plots and inventory.

HOW TO GET HERE

Settings → Data Import.

WHAT YOU SEE ON THE SCREEN

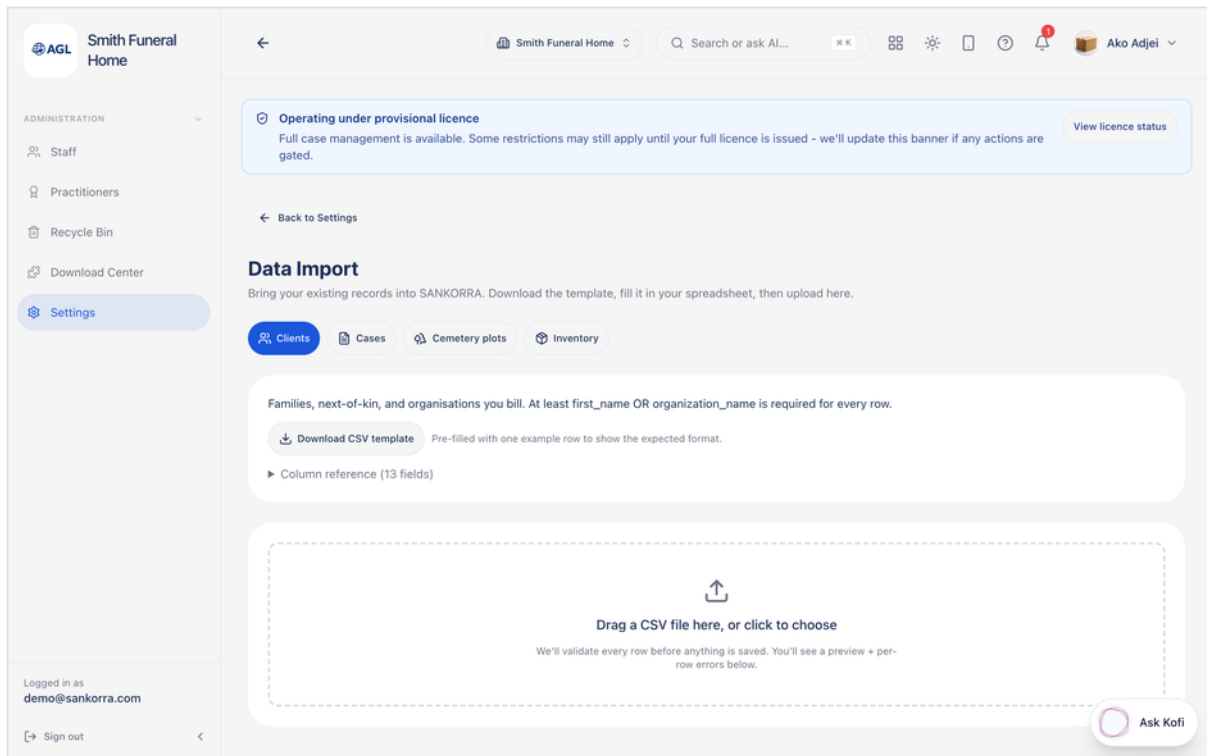
The heading **Data Import** with the line "Bring your existing records into SANKORRA. Download the template, fill it in your spreadsheet, then upload here."

Four buttons across the top: **Clients**, **Cases**, **Cemetery plots** and **Inventory**. Each has its own description, for example for cases: "Historical case records. case_number is required - use your existing system's numbering scheme or fall back to legacy-001, legacy-002, ..."

Then a **Download CSV template** button with the note "Pre-filled with one example row to show the expected format", and a **Column reference** list you can expand to see every column, with a red **required** badge on the ones you must fill.

Below that, a drop area reading "Drag a CSV file here, or click to choose" and the reassurance "We'll validate every row before anything is saved. You'll see a preview + per-row errors below."

Once a file is loaded you see its name, how many rows it has, and either **Ready to import** in green or "*N* error(s)" in red, plus **Clear file** and **Import *N* rows**. Rows with problems are highlighted, and the errors are listed as "Row 14 - column date_of_death: Use YYYY-MM-DD".



Data Import with the Cases tab selected, a file loaded, and the preview table showing highlighted error rows and the error list

WHAT YOU CAN DO HERE

To import your records:

- 1** Press the button for what you are importing.
- 2** Press **Download CSV template**.
- 3** Open the file in your spreadsheet program, delete the example row, and fill in your own records. Keep the column headings exactly as they are.
- 4** Save it as a **CSV** file.
- 5** Drag the file onto the drop area, or press it and choose the file.
- 6** Read the preview and fix any errors listed.
- 7** Save your spreadsheet as CSV again and upload it again.
- 8** When the badge reads **Ready to import**, press **Import N rows**.

Good to know

- **An import cannot be undone.** There is no rollback and no "undo last import". If you upload the same file twice you will get two copies of everything. Import once, check the result, and keep the file you used.
- **Import** stays greyed out until there are no errors at all. That is deliberate — nothing is saved while there is a problem.
- **The file must be a CSV.** An .xlsx spreadsheet will be refused with "Only CSV files are accepted". In your spreadsheet program use "Save as" or "Export" and choose CSV.
- Column headings are matched without regard to capitals, but a missing required heading stops the file being read at all, with a message naming the columns. Extra columns are ignored with a warning.
- For **Cemetery plots**, every **section_code** must match a cemetery section you have already created, or every row will fail.
- Dates must be written as YYYY-MM-DD, for example 2026-03-12.
- Imported records are ordinary records afterwards. They can be edited, and where the Recycle Bin covers them (cases, clients, plots) they can be deleted and restored in the normal way.



CHAPTER 12

Configuration

Like the previous chapter, everything here is written for the **owner or administrator** of the facility, not for front-line staff. The six screens in this chapter live in the same

CONFIGURATION menu group introduced in Chapter 11, and only appear in the sidebar for those two roles. If a colleague cannot see this menu, or needs to know how to show every sidebar group at once, see the note at the start of Chapter 11.

These screens shape how your whole team works: who has a login and what they can do, the states a case moves through, the forms your team fills in, and a log of what has happened. Two things here are worth extra care, and each section below calls them out again where they apply:

- Changing what a role can do changes it for **everyone who holds that role**, immediately — not just for one person.
- Some actions cannot be undone: deleting a role, deleting a workflow while it is still unused, and saving a form after removing one of its sections or fields.

12.1 Users & Access

WHAT THIS SCREEN IS FOR

a simpler, second place to see everyone with a login to your dashboard, invite a new one, change a role, and suspend or remove someone. It covers the same people as Staff (11.1), but not practitioners, and it does not show department or who is online now.

HOW TO GET HERE

Sidebar → CONFIGURATION → Users & Access.

WHAT YOU SEE ON THE SCREEN

The heading **Users & Access** with the line "Manage team members and their permissions", and on the right an **Invite User** button (owners and admins only).

Below that, four counts: **Total Users**, **Active**, **Pending Invites** and **Roles**. The Roles count always reads 5 here — it counts the built-in roles only, not any custom role you have built on Roles & Permissions (12.2).

Then three tabs:

- **Users** — a search box, a role filter (All Roles, Owner, Administrator, Manager, Staff, Viewer), and the list itself. Each row shows an avatar with initials, the person's name, a **You** badge on your own row, a **Suspended** badge if their access is off, their email and staff ID, a coloured role badge, their job title, how long ago they joined, and a three-dot menu.
- **Invitations** — the list of invitations still waiting to be accepted, each with the email address, who sent it and when, the role offered, and whether it has expired.
- **Roles** — a reference card for each of the five built-in roles (Owner, Administrator, Manager, Staff, Viewer), showing how many people currently hold it and a short, fixed description of

what it grants. This description does not update if you have changed that role's actual permissions on Roles & Permissions (12.2) — for the real, current picture, use that screen instead.

Users & Access page on the Users tab, showing the four counts, the role filter, and rows with role badges and a Suspended badge

WHAT YOU CAN DO HERE

To invite someone:

- 1 Press **Invite User**.
- 2 Type their **Email Address**.
- 3 Choose a **Role**. Only the five built-in roles are offered here, and Owner is not one of them. If you have built a custom role on Roles & Permissions (12.2) and want to invite someone straight into it, use Staff → Invite Member (11.1) instead — that list includes every custom role you have built.
- 4 Press **Send Invitation**.

To change someone's role or staff ID:

- 1 Open the three-dot menu on their row and choose **Edit User**.
- 2 Change the **Staff ID** if you need to — it must be unique within your facility.
- 3 Choose a new **Role**. You cannot promote anyone to Owner from this dialog.
- 4 Press **Save Changes**.

To suspend, activate or remove someone:

- 1 Open the three-dot menu on their row.
- 2 Choose **Suspend User**, **Activate User**, or **Remove User**, and confirm.

To resend or cancel a pending invitation:

- 1 Go to the **Invitations** tab.
- 2 Press the refresh icon to resend the email and give them another seven days, or the **X** to cancel it (with a confirmation).

Good to know

- **You cannot invite the same email twice.** If it already belongs to a team member, a red note appears naming their current role and telling you to use Edit instead, and **Send Invitation** stays greyed out. If they already have an invitation waiting, an amber note shows when it was sent and when it expires.
- **If the invitation email cannot be sent, this screen has no way to hand the person a join link.** The Invitations tab only offers Resend and Cancel here. If someone tells you they never received an invite, use Staff → Invite Member (11.1) instead, which offers a **Copy Invite Link** you can send yourself by WhatsApp or text.
- **Removing someone works the same as suspending them.** Either way they lose access straight away, and either way they still appear in this list — now marked **Suspended** — where **Activate User** can switch their access back on. There is no extra step that erases them, and neither action sends anyone to the Recycle Bin (11.5).
- You cannot suspend or remove **yourself** from here. This screen does not stop an administrator from suspending or removing the **Owner**, so take extra care whose row you are acting on — use the Owner's own staff page (11.2) if you want that protection.
- Only owners and admins see **Invite User**, but anyone who opens this address directly can still see the full list and use the row menu.

12.2 Roles & Permissions

WHAT THIS SCREEN IS FOR

deciding exactly what each role is allowed to do, and building custom roles of your own with a narrower or wider set of permissions.

HOW TO GET HERE

Sidebar → CONFIGURATION → Roles & Permissions.

WHAT YOU SEE ON THE SCREEN

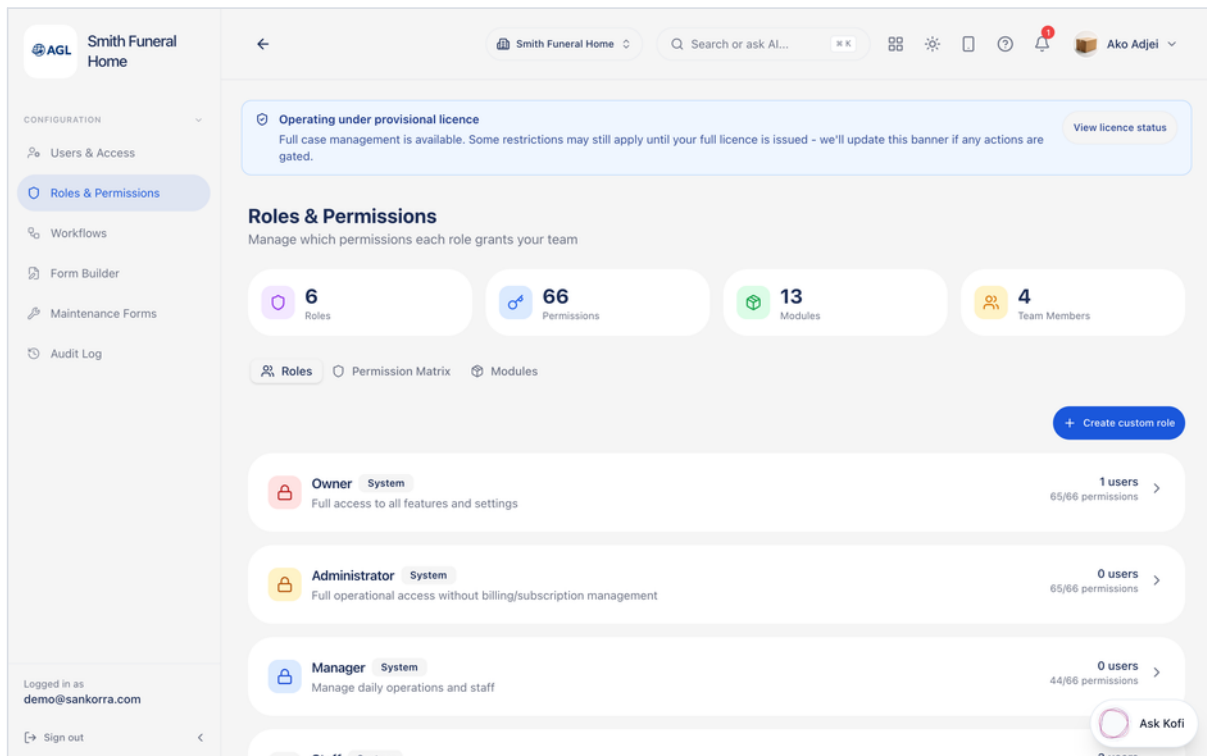
The heading **Roles & Permissions**, with a line that reads "Manage which permissions each role grants your team" if you are an owner or admin, or "View which permissions each role grants your team" otherwise.

Four counts: **Roles**, **Permissions**, **Modules** and **Team Members**.

Then three tabs:

- **Roles** — a **Create custom role** button (owners and admins only), then a card for every role at your facility: the five built-in roles first, marked **System**, then any custom roles you have built, marked **Custom** with a "base: ..." badge. Each card shows how many people hold it and how many of the total permissions it grants, and opens to show which ones, grouped by module. A custom role that nobody currently holds also shows a bin icon to delete it.

- **Permission Matrix** — a table with one row per permission and one column per role, a green tick where a role has it, a grey cross where it does not. Owners and admins can press any tick or cross to change it on the spot; everyone else sees it read only. Hover or tap the question-mark icon beside a permission's name to see what it actually covers.
- **Modules** — the same permissions grouped into cards by the part of Sankorra they control (Cases, Billing & Invoices, Inventory, Storage, Cemetery, Fleet, Chapel, Staff Management, Reports, Settings, Audit Logs, Support), with a short description under each one.



The Permission Matrix tab showing the role columns, green ticks and grey crosses, and the note about changes being enforced immediately

WHAT YOU CAN DO HERE

To change what a role can do:

- 1 Open the **Permission Matrix** tab.
- 2 Press any tick or cross to grant or take away that one permission for that one role.

To build a custom role:

- 1 On the **Roles** tab, press **Create custom role**.
- 2 Type a **Display name**, for example "Warehouse Manager".
- 3 Check the **Code** that fills in underneath it — it is generated from the name, but you can change it. It must be lowercase letters, numbers and underscores only, and cannot match a built-in role.
- 4 Optionally type a **Description**.
- 5 Choose a **Base role** — the closest match of Viewer, Staff, Manager or Admin. This sets a general seniority level for a handful of older checks elsewhere in Sankorra; it is separate from the exact permissions you set afterwards.

- 6 Choose **Start permissions from** — leave it as **Empty**, or clone the current permissions of an existing role as your starting point.
- 7 Press **Create role**.
- 8 Shape its final permissions on the **Permission Matrix** tab.

To delete a custom role:

- 1 On the **Roles** tab, press the bin icon on its card. This only appears once nobody holds that role any more.
- 2 Confirm on the dialog.

Good to know

- **Changes on the Permission Matrix save and are enforced immediately, for everyone who holds that role.** Someone already signed in sees the change within about a minute, or the next time they reload the page — they do not need to sign out first.
- **The Owner role always keeps full access.** Its column on the matrix cannot be edited by anyone, including the owner.
- Built-in roles (Owner, Administrator, Manager, Staff, Viewer) cannot be deleted. Only custom roles can be, and only once nobody is assigned to them any more — move people to a different role first.
- **Once you create a custom role, you cannot rename it, change its description or change its base role afterwards** — only its permissions, or delete it outright. Choose the name and code carefully before you press Create role.
- Deleting a custom role is permanent. There is no Recycle Bin entry for a role.
- This screen keeps no note of who changed a permission or when — see the note about the Audit Log in 12.6.

12.3 Workflows

WHAT THIS SCREEN IS FOR

building the states a case (or another kind of item, such as a document, an invoice or a vehicle) moves through, and the moves allowed between them.

HOW TO GET HERE

Sidebar → CONFIGURATION → Workflows.

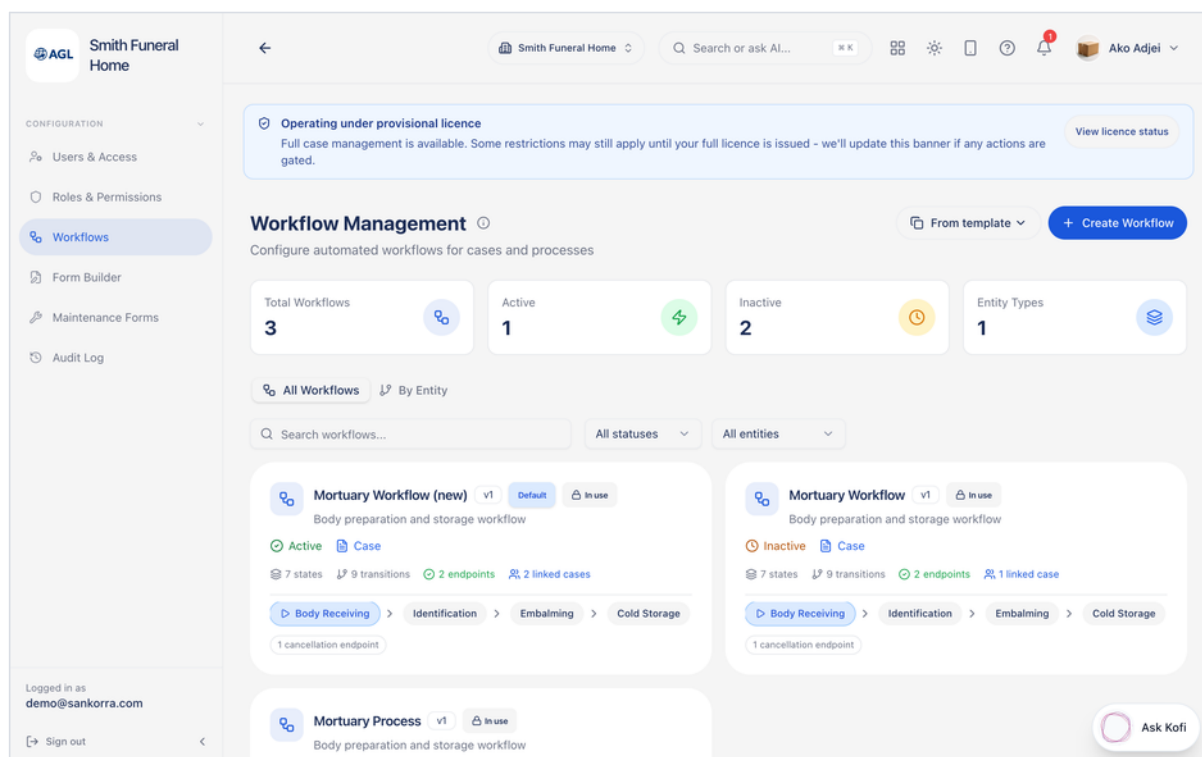
WHAT YOU SEE ON THE SCREEN

The heading **Workflow Management**, with an information icon that explains "Only one workflow per entity type can be active at a time." On the right, a **From template** button (with a "Generate with AI" option inside it) and **Create Workflow**.

If your facility has workflows but none is switched on, a blue note explains that new cases will use Sankorra's own fallback workflow until you activate one of yours.

Four counts: **Total Workflows**, **Active**, **Inactive** and **Entity Types**. Then two tabs:

- **All Workflows** — a search box, a **Status** filter and an **Entity** filter, then a card for each workflow: its name, version number, a **Default** badge if it is the one used for new cases, an **In use** or **Published** badge, its status, how many states and moves it has, and a small diagram of the path from its start state to its end state. A three-dot menu offers **View**, **Edit** (or **Create new version** once it is in use), **Rename**, **Linked cases**, **Duplicate**, **Activate** or **Deactivate**, and **Delete** (only while it has never been used).
- **By Entity** — the same workflows grouped by the kind of item they run for, with the active one's diagram shown inline and its inactive versions listed below.



Workflow Management page showing the stats, a workflow card with its In use badge and diagram, and the three-dot menu open

WHAT YOU CAN DO HERE

To build a new workflow:

- 1 Press **Create Workflow** to start from a blank step list, or **From template** to start from a ready-made set of steps for funeral homes, mortuaries, cemeteries and so on, or **Generate with AI** and describe what you need in your own words.
- 2 On the editor, work through the **Simple** list under **Workflow Steps**: type a **Workflow Name** and **Description** at the top, then press **Add Step** for each one you need. Give it a **Name** and, optionally, an **Expected Time (hours)**. Drag steps by their handle to reorder them, and tap the skip-forward icon on a step to mark it **Optional** (with a short reason) or make it required again. A separate, non-draggable **Cancelled** step sits below the main list as an alternative ending.
- 3 Press **Save Draft** to keep working later, or **Publish Workflow** when it is ready for cases to use.

To edit an existing workflow:

- 1 Open its three-dot menu and choose **Edit**. If it has already been used by a case, or is currently active, this instead offers **Create new version** — see Good to know below.
- 2 Make your changes and **Save Draft** or **Publish Workflow**.

To make a workflow the one new cases use:

- 1 Open its three-dot menu and choose **Activate**.

To see which cases have used a workflow:

- 1 Open its three-dot menu and choose **Linked cases**, or press the "linked cases" count on its card.

Good to know

- **A workflow becomes locked, and is marked "In use", the moment any case starts on it.** A locked workflow cannot be edited or deleted. This is deliberate: editing the states of a workflow that a case is already running on could change the meaning of that case, or its history.
- **To change a locked or published workflow, create a new version.** This makes an editable copy with the same states. Edit the copy and publish it when ready. **Existing cases stay on the version they started on; only new cases use the newly published version.** Changing a step never retroactively changes a case that is already running.
- **Renaming is always available**, even for a locked or published workflow, because it only changes the display name — the states, moves and any case already linked to it are untouched.
- **Deleting a workflow is only offered while it has never been used**, and it is permanent — the workflow and its states and moves are gone for good, with no Recycle Bin entry.
- Only one workflow per kind of item (for example, per "case") can be active at a time. Activating one automatically means any other active workflow of the same kind switches off.
- **You cannot remove the first (Start) or the last (Complete) step of a workflow, or the separate Cancelled step** — only steps you have added in between.
- The full visual (Advanced) editor needs a bigger screen than a phone; on a phone you are offered the Simple list-based editor instead, where available. Some workflows — branching ones, or ones using approvals, conditions or permissions — are too complex for the Simple editor and open in Advanced only.
- This menu item only appears if Workflow is installed from Download Center (11.6) and included in your subscription plan. If it is uninstalled, or not part of your plan, opening it tells you so instead of showing the page.

12.4 Form Builder

WHAT THIS SCREEN IS FOR

designing the forms your team fills in elsewhere in Sankorra — for cases, clients, staff records, inventory items and more — as a set of sections and fields, and publishing them for use.

HOW TO GET HERE

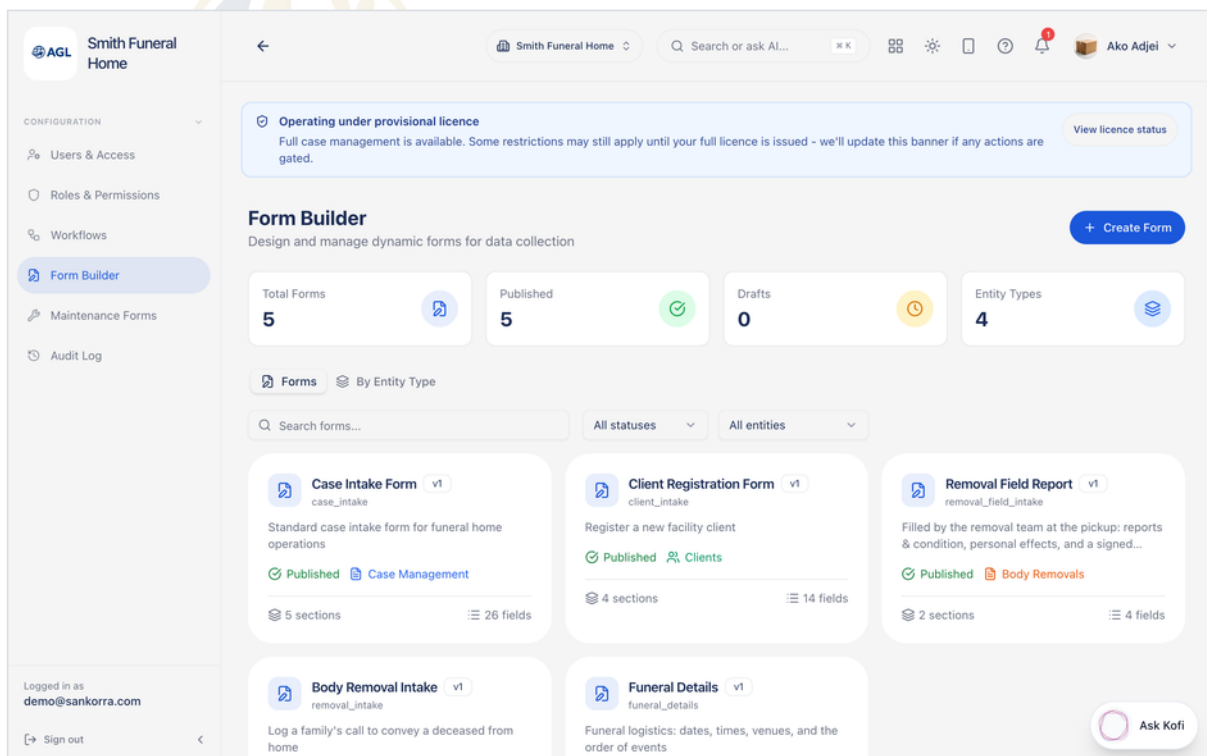
Sidebar → CONFIGURATION → Form Builder.

WHAT YOU SEE ON THE SCREEN

The heading **Form Builder** with the line "Design and manage dynamic forms for data collection", and a **Create Form** button.

Four counts: **Total Forms**, **Published**, **Drafts** and **Entity Types**. Then two tabs, **Forms** and **By Entity Type**, each form shown as a card with its name, code, version, status (**Published**, **Draft**, **Deprecated** or **Archived**), the kind of item it applies to, and how many sections and fields it has. Its three-dot menu offers **Preview**, **Edit** (or **View**, plus **Customize for this facility**, on a shared Sankorra template), **Duplicate**, **Publish** or **Deprecate**, and **Delete** (your own forms only).

A blue note at the bottom explains that forms are built as sections with fields, that published forms carry a version number, and that only draft forms are meant to be edited freely.



Form Builder page showing the four counts and a grid of form cards with status and entity-type badges

WHAT YOU CAN DO HERE

To build a new form:

- 1 Press **Create Form**.
- 2 Fill in **Form Code**, **Form Name**, **Description** and **Entity Type**.

- 3 Press **Add Section**. Check the **Section Code** it suggests, give it a **Title** and, optionally, a **Description**. Switch on **Collapsible** if you want your team to be able to fold the section shut, and **Initially Collapsed** if it should start folded.
- 4 Inside the section, press **Add Field** for each piece of information you want to collect. Check the **Field Code** it suggests, give it a **Label**, and choose a **Field Type** (Text, Number, Dropdown, Date, File Upload, Signature, Currency and around twenty others). Optionally add a **Placeholder**, **Description** and **Help Text**, and switch on **Read Only** or **Disabled** if the field should show but not be editable. For a Dropdown, Multi-Select, Radio Buttons or Checkbox Group field, add its options underneath.
- 5 Press **Save Draft** to keep working, or **Publish** to make it available for use straight away.

To adjust a Sankorra template for your own facility:

- 1 On the Forms list, open the template's three-dot menu and choose **Customize for this facility**.
- 2 Sankorra makes you an editable copy under the same form code. Edit it like any other form, then **Publish** it — your version then takes over on the pages that use that form at your facility, while the shared template is unaffected for everyone else.

To reuse a form as a starting point for a new one:

- 1 Open its three-dot menu and choose **Duplicate**.

Good to know

- **A Sankorra template cannot be edited directly** — its cards read **View** instead of **Edit**, and the editor shows an amber note explaining you need to customise it first.
- **Saving an existing form — Save Draft or Publish — replaces its entire list of sections and fields with whatever is currently in the editor.** If you deleted a section or a field since you opened the form, saving removes it for good. There is no Recycle Bin entry for a form, a section, or a field (11.5).
- **There is no switch to mark a field as required on this screen.** Every field you build here is optional to fill in wherever the form appears. If you need required fields, use Maintenance Forms (12.5) instead, which does have one.
- **Deleting a form is refused once it has collected any data**, with a message telling you to use **Deprecate** instead — deprecating removes it from use while keeping what has already been submitted.
- Publishing a form that is already published bumps its version number by one, so you can tell at a glance that a newer version went live.
- This menu item only appears if Form Builder is installed from Download Center (11.6) and included in your subscription plan.

12.5 Maintenance Forms

WHAT THIS SCREEN IS FOR

choosing which fields appear on your facility's equipment, maintenance and temperature forms, and adding your own.

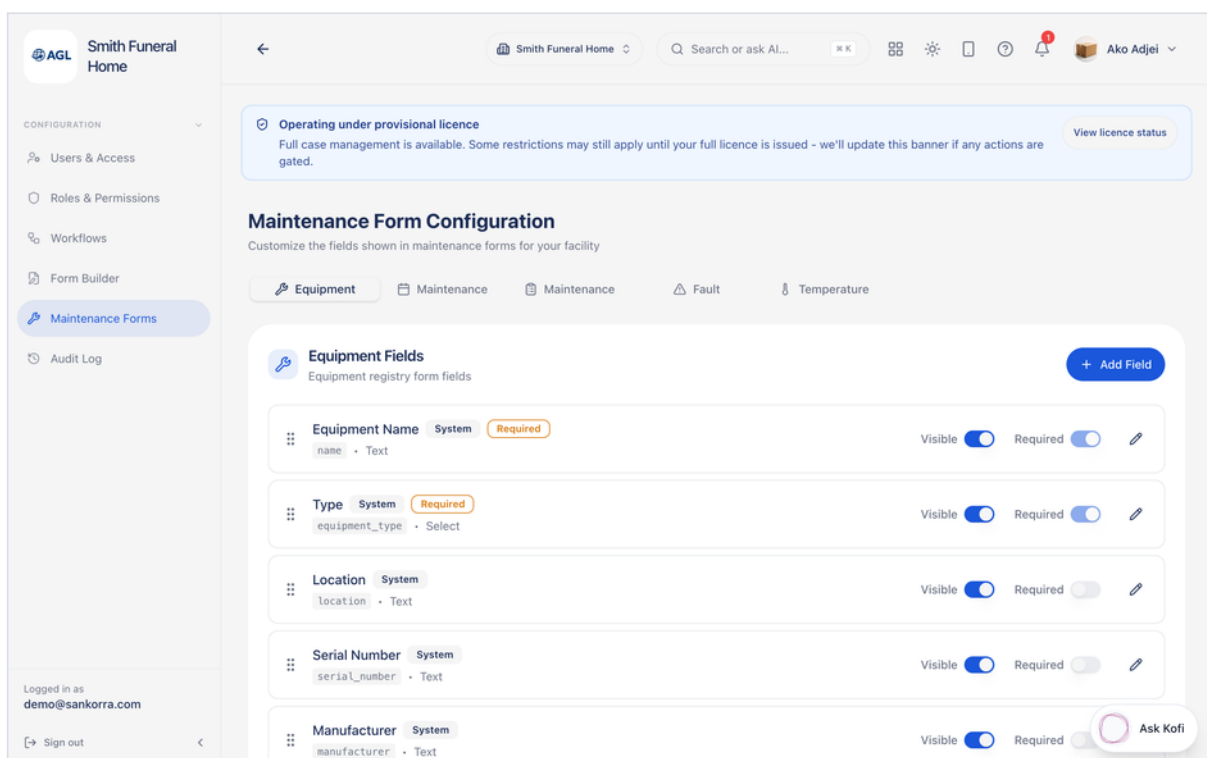
HOW TO GET HERE

Sidebar → CONFIGURATION → Maintenance Forms.

WHAT YOU SEE ON THE SCREEN

The heading **Maintenance Form Configuration** with the line "Customize the fields shown in maintenance forms for your facility", and five tabs: **Equipment**, **Maintenance Schedule** (shown as "Maintenance" on a narrow screen), **Maintenance Log**, **Fault Report** and **Temperature Log**.

Inside each tab, a card headed "Form Fields" with an **Add Field** button, then the fields themselves, in order, each showing a grip handle, the field's label, a **System** badge if Sankorra built it in, a **Required** badge if it must be filled in, its internal field name and type, a **Visible** switch, a **Required** switch, an edit (pencil) button, and a bin button — the bin does not appear on system fields.



Maintenance Form Configuration on the Equipment tab, showing several fields with their Visible and Required switches

WHAT YOU CAN DO HERE

To add a field:

- 1 Open the tab for the form you want to change and press **Add Field**.
- 2 Type a **Field Label**, for example "Serial Number" — the internal field name fills in underneath it automatically.

- 3** Choose a **Field Type** (Text, Number, Decimal, Date, Dropdown, Multi-Select, Yes/No, Email, Phone, URL and a few more).
- 4** Switch **Required field** on if it must be filled in.
- 5** For a Dropdown or Multi-Select field, list its options, one per line — type just the label, or **value:Label** if you want the stored value to differ from what is shown.
- 6** Optionally add **Placeholder Text** and **Help Text**.
- 7** Press **Add Field**.

To show or hide a field, or make it required:

- 1** Press its **Visible** or **Required** switch. Each one saves straight away.

To edit a field's wording:

- 1** Press the pencil icon.
- 2** Change its **Field Label**, **Placeholder Text**, **Help Text** or dropdown options. Its field type cannot be changed once created.
- 3** Press **Save Changes**.

To remove a field you added:

- 1** Press the bin icon and confirm.

Good to know

- **Visible and Required switches save the instant you press them** — there is no separate Save button for those two.
- **A field Sankorra built in (marked System) cannot be deleted**, and if it is already required, you cannot switch that off either. You can still edit its label, placeholder and help text.
- **A field's type is fixed once you create it**. If you need a different type, delete the field and add a new one instead.
- **Deleting a field is immediate and cannot be undone**.
- This menu item only appears if Facility Maintenance is installed from Download Center (11.6).

12.6 Audit Log

WHAT THIS SCREEN IS FOR

a list of actions taken across your facility, so you can see who did what and when.

HOW TO GET HERE

Sidebar → CONFIGURATION → Audit Log.

WHAT YOU SEE ON THE SCREEN

The heading **Audit Log** with the line "Track all actions and changes in your facility", and **Refresh** and **Export CSV** buttons.

Five counts: **Total Entries**, **Today's Activity**, **Unique Users**, **Successful** and **Failed**. Then two tabs:

- **All Activity** — a search box; a **Category** filter (Authentication, Cases, Billing, Inventory, Storage, Cemetery, Fleet, Chapel, Staff, Settings, Permissions, System); an **Action** filter (Create, Update, Delete, View, Transition, Login, Logout, Export); and a date range. Below that, the entries themselves, newest first: an action badge, the kind of thing affected and its name, a **Failed** badge if it did not succeed, who did it, how long ago, and its category. Press an entry to expand it and see the previous and new values, the IP address, and other technical details.
- **By Category** — the same twelve categories as tiles, each showing how many entries currently loaded fall into it; press one to jump back to **All Activity** filtered to it.

Audit Log page showing the five counts, the category and action filters, and an expanded entry with previous and new values

WHAT YOU CAN DO HERE

To find something specific:

- 1 Type into the search box, or choose a **Category**, an **Action**, or a date range. You can combine several at once.
- 2 Press **Clear Filters** to start over.

To see the detail behind an entry:

- 1 Press the entry to expand it.

To download what you are looking at:

- 1 Press **Export CSV**. This downloads exactly the entries currently shown — apply your filters and search first.

To bring in anything logged since you opened the page:

1 Press **Refresh**.

Good to know

- **Not everything you or your team does produces an entry here.** The category and action lists cover a wide range on purpose, but in practice most of what you will see today concerns your team — invitations, suspending or restoring access, removing someone — and account security. If you filter to a category and see nothing, that does not necessarily mean nothing happened in that area; it may simply not be logged yet.
- **Changing a role's permissions on Roles & Permissions (12.2) does not currently appear here.** If you need to know who changed what and when, you will need to ask.
- The list keeps loading more entries as you scroll; there is no separate "load more" button.
- This screen has no plan or module gate of its own, but the menu item is hidden from anyone who is not an owner or admin.

