

Batesville Connect Online Experience Training – FAQs

Q: How will a customer log in to Batesville Connect?

A: Customers with existing Batesville.com accounts can use their current user ID (email address) and will need to reset their password. The first time a customer logs in after “go live,” they will need to click on the “Forgot Password” link. Users will validate request through their email address and then create a new password. For customers that do not have an existing Batesville.com account, they will need to create one to gain access to Batesville Connect.

Q: Will a customer see which funeral homes the delivery driver stopped at prior to their own?

A: The zoom functionality provides the customer with enhanced visibility without revealing previous stops or specific locations. The Google map is meant to be directional with where the driver is enroute.

Q: How will a customer know their casket order has been confirmed?

A: In addition to a confirmation within Batesville Connect, once the order is submitted, the customer will receive an email confirmation with the order, billing, and delivery details for reference purposes. Additionally, they will receive a ship and delivery confirmation for reference purposes.

Q: Will only casket orders placed through Batesville Connect have the ability to be tracked?

A: ALL casket orders regardless of how the order is placed will have tracking capability provided the caskets are delivered on a Batesville vehicle. Third party expedited deliveries cannot be tracked.

Q: Will the customer be able to see if a unit is backordered?

A: At launch, customers will not have visibility to stocking levels for caskets.

Q: How will a customer know when an urn personalization proof is ready for approval?

A: Once the Batesville design team has created the proof they will email/fax it back for approval. In addition, customers will receive a reminder email at 1pm local time every day until the proof is approved.

Q: How can a customer create/design an urn in Batesville Connect?

A: Customers will input the specific information required to personalize the urn. Once sent to Batesville, a design team specialist will create a proof and send an email/fax from which the order was placed.

Important Note: The “design yourself” urn personalization functionality in BOO was very slow and inefficient and was used <3% of the time for all order placed in BOO. The new approach is fast, simple and we believe turnaround times for proofs will be favorably impacted as we move to the new experience.

Q: Will there be an indicator to show if an engraved urn proof has been approved?

A: The order status will show "pending proof approval" in the active order section until the proof has been approved by the customer.

Q: Can a customer pay online when they place an order?

A: Yes, the default payment method will be “bill my account.” However, the customer will also have the option to pay via credit card as well as the new ACH method.

Q: How does a customer request administrative access?

A: Customers request access through a link on their Batesville Connect dashboard. Once the request is initiated, an email is sent to data integrity. Data integrity will follow a new standard process and reach out to the respective sales representative to confirm the request.

Q: Who within the funeral home may manage users?

A: Only the user with administrative access may manage users, including those who have access to pricing information.

Q: Does the net price view include a customer's rebate?

A: The invoice price is list price minus the discount if paid within agreed upon payment terms (without consideration of potential rebates).

Q: Who can pay a bill within Batesville Connect

A: Only users with administrative access can view invoices, statements and pay bills.

Q: Will customers continue to receive a physical statement if they choose to pay online?

A: All customers will continue to receive a physical statement regardless of how a customer chooses to pay their bill.

Q: Will the new ACH payment option be available to all customers?

A: Currently the ACH payment option is available for U.S. customers only.

Q: If a customer selects “next delivery” for an extended delivery product, when can they expect to receive it?

A: If a customer orders an extended delivery product through Batesville Connect, the system will automatically push the order out 7 days from date of order. Any other caskets that are not extended delivery items will be delivered on their next scheduled delivery date.