

LEGACease

LEGACease is the complete Legacy management package from JAC, handling all aspects of Legacy administration from initial mailing to successful receipt of monies.

All details relating to the Legacy are captured using JAC standard interfaces:

Reason	Date	Source	RAF Station	Perm / Train
Consultant	31/07/1997			
100 Club Mem	31/07/1997			

Full details of the potential Legator / Legator are recorded on the system with full postcode lookup (using AFD postcode).

Details of the communication are stored against each record so that a full audit trail of communication can be viewed at any time:

Date	Type	From	To
18/08/2008	out	email	Admin trutvtrityeluy
18/08/2008	out	telephone	Admin dkmfjkd fddfdifdl fhd fdfdfhfl hldfhdfhdfl fd fdfhd fhdhfdhdfhd
18/08/2008	out	letter	Admin tet DDInitial DD Initial Letter
18/08/2008	out	email	Admin etdtdff
18/08/2008	In	Email	Admin C:\Documents and Settings\Alan\My Documents\bdh.doc
30/07/2008	out	email	Admin test
30/07/2008	In	Email	Admin fdfhdjdfdfdf C:\Documents and Settings\Alan\My Documents\chatid.doc
05/06/2008	out	email	Admin dfjdfjh
10/07/2005	Out	Mailing	Admin MS/173
30/11/2004	Out	Mailing	Admin MS/170A
01/10/2004	Out	Mailing	Admin MS/168B
01/06/2004	Out	Mailing	Admin MS/167
01/09/2003	Out	Mailing	Admin MS/162
24/11/1998	Out	Mailing	Admin MS/135

All communication with the Supporter is captured using the standard communication screens:

Emails sent out (using Outlook)

comms out - email : Form

Enter Details of the email to be Sent Below. Click the comms button to send the email.

Subject: []

Body: []

[comms]

Word Documents Sent Out

comms out - letter : Form

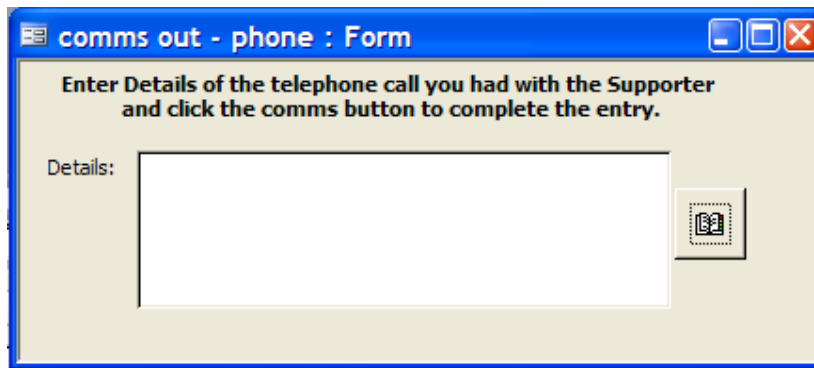
Enter Details of the Letter to be Sent Below and choose a Document to Merge the Supporter details with. Click the comms button to complete the Merge.

Details:

Document:

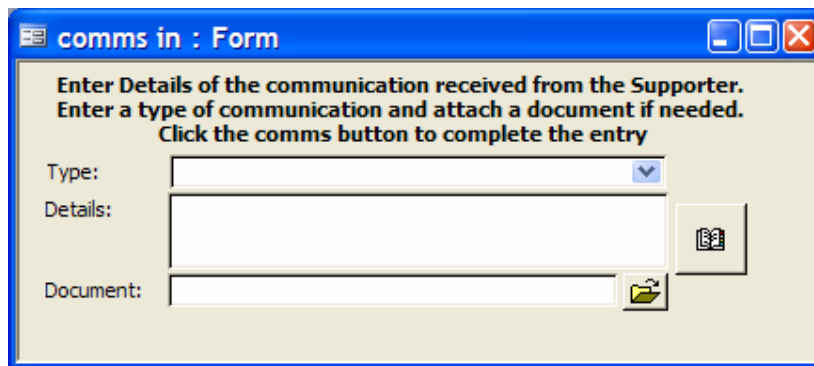
All word documents are stored against the record for future use after merging so that each letter sent can be personalised and viewed at any time without the need to revert to paper files.

Telephone Conversation out



The screenshot shows a window titled "comms out - phone : Form". The window has a blue title bar with standard Windows window controls (minimize, maximize, close). The main content area has a light beige background. At the top, there is a bold instruction: "Enter Details of the telephone call you had with the Supporter and click the comms button to complete the entry." Below this instruction, there is a label "Details:" followed by a large, empty rectangular text input field. To the right of the text field is a small square button with a document icon.

Communication In



The screenshot shows a window titled "comms in : Form". The window has a blue title bar with standard Windows window controls (minimize, maximize, close). The main content area has a light beige background. At the top, there is a bold instruction: "Enter Details of the communication received from the Supporter. Enter a type of communication and attach a document if needed. Click the comms button to complete the entry". Below this instruction, there are three input fields: "Type:" with a dropdown menu, "Details:" with a large text input field, and "Document:" with a text input field and a file explorer icon to its right. To the right of the "Details:" field is a small square button with a document icon.

Scanned documents can also be stored against a Supporter so that a full audit trail of communication can be stored

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All Legacy details are captured once the Supporter indicates that they are going to include the charity in a Legacy.

Supporter - Legacy : Form

Legacy Details | Executor / Solicitor | Co Beneficiaries | Shares | Receipts

Supporter ID:	171335	Mr A J Owen	
Source:		Will Type:	
Will Date:		Date Received:	
Smee & Ford:		Date of Death:	
Date Notified:		Date of Probate:	
Probate Value:	£0.00	Value of Legacy to RAFA:	£0.00
Property:			
Actual Value:	£0.00	Overall Will Amount:	£0.00
RAFA % Share:	0	Final Pay Date:	
Residue to Date:	£0.00	Residue Amount:	£0.00
Residue Left:	£0.00	Closed Date:	
Notes:			

Final Tax Certificate Tax Received: £0.00 Date R185 Received:

Record: 1 of 1 (Filtered)

OUT

IN

TASKS:

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Executors and Solicitor details are also stored:

The screenshot shows a software window titled "Supporter - Legacy : Form". It has a blue title bar with standard window controls (minimize, maximize, close) on the right. Below the title bar is a tabbed interface with five tabs: "Legacy Details", "Executor / Solicitor", "Co Beneficiaries", "Shares", and "Receipts". The "Executor / Solicitor" tab is currently selected. The main area of the window is a light beige color and contains two sets of input fields. The first set is for an "Executor" and includes fields for "Executor Name:", "Address:" (three lines), "Town:", "Postcode:" (with a dropdown arrow), and "Telephone Number:". The second set is for a "Solicitor" and includes fields for "Solicitor Name:", "Contact:", "Address:" (three lines), "Town:", "Postcode:" (with a dropdown arrow), and "Telephone Number:". At the bottom of the window, there is a record navigation bar that says "Record: 1 of 1 (Filtered)" and includes navigation icons for first, previous, next, and last records.

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Co Beneficiaries can also be recorded:

The screenshot shows a software window titled "Supporter - Legacy : Form". It has four tabs: "Legacy Details", "Executor / Solicitor", "Co Beneficiaries", and "Shares". The "Co Beneficiaries" tab is active. The main area contains a table with the following headers: "Beneficiary Name", "Amount", "Percent", and "IHT". There is one empty row in the table. At the bottom of the window, there is a record navigation bar that says "Record: 1 of 1 (Filtered)".

Beneficiary Name	Amount	Percent	IHT

Record: 1 of 1 (Filtered)

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Details of shares received can be stored:

The screenshot shows a software window titled "Supporter - Legacy : Form". The window has a blue title bar and standard Windows window controls (minimize, maximize, close) in the top right corner. Below the title bar is a tabbed interface with five tabs: "Legacy Details", "Executor / Solicitor", "Co Beneficiaries", "Shares", and "Receipts". The "Shares" tab is currently selected and active. The main content area of the window is a light beige color and contains a table with two columns: "Share Details" and "Estimated Share Value". The table is currently empty, with only a few blank rows visible. At the bottom of the window, there is a record navigation bar that includes the text "Record:" followed by navigation icons (back, forward, search, etc.) and the text "1 of 1 (Filtered)".

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A full receiving module is also included to record details of payment received:

The screenshot shows a software window titled "Supporter - Legacy : Form". It has a menu bar with "Legacy Details", "Executor / Solicitor", "Co Beneficiaries", "Shares", and "Receipts". The "Receipts" tab is active. Below the menu bar is a table with the following columns: Date, Amount, Gift Aid, Pay Method, Batch, Analysis Code, Letter, and Cost Centre. The table is currently empty. At the bottom of the window, there is a record navigation bar that says "Record: 1 of 1 (Filtered)".

Date	Amount	Gift Aid	Pay Method	Batch	Analysis Code	Letter	Cost Centre
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Record: 1 of 1 (Filtered)

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As Legacies can take a number of years to come to fruition, LEGACease incorporates a full task system allowing you to set tasks to remind yourself of important events for the Legacy. Any task can be recorded including standard tasks and user defined tasks.

Task Entry

Enquiry: New Legacy (dropdown) Taken By: Admin (dropdown)
Contact Date: 20/10/2007 Contact Time: 20:55
Notes: Legacy Follow Up
Attachment: [icon]
Supporter: [dropdown]
RAFA Org: [dropdown]
Other Org: [dropdown]
Event: [dropdown]
Task ToDo: Follow Up (dropdown) Assigned To: Admin (dropdown)
Date Required: 20/10/2008 Time Required: 09:00 Completed:

On the main menu is a task schedule allowing you to monitor any outstanding tasks both for yourself and other users of the system:

Task to do	Date Req	Time Req		
Follow Up Admin	20/10/2008	09:00	Outstanding	[icon]
Follow Up Admin	20/07/2008	09:00	Outstanding	[icon]
Follow Up Admin	20/04/2008	09:00	Outstanding	[icon]
Follow Up Admin	20/01/2008	09:00	Outstanding	[icon]
Follow Up Admin	08/01/2008	09:00	Outstanding	[icon]
Email	15/09/2007		Outstanding	[icon]

Enter Tasks Preview Tasks List Tasks

You currently have **8** tasks outstanding!

Included within the software is a full query/report writer enabling you to report on Legacies and marketing campaigns and produce statistical analysis as needed:

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The screenshot displays the 'Reporting Module' window. At the top, there is a title bar with the text 'Reporting Module' and standard window control buttons (minimize, maximize, close). Below the title bar is a table with three columns: 'View Name (dbl-click to open report)', 'Author', and 'Create Date'. The table contains 18 rows of report entries. Below the table is a record navigation bar with the text 'Record: 1 of 18' and navigation icons. Underneath the navigation bar is a 'Report' dropdown menu currently set to 'Basic Supporter Query'. At the bottom of the window, there are five buttons: 'Modify Report', 'New Report', 'Edit All Reports', 'Requery List', and 'Exit'.

View Name (dbl-click to open report)	Author	Create Date
Basic Supporter Query	JAC	20/01/2005
Supporters By Reason	JAC	20/01/2005
Receipts By Date	JAC	20/01/2005
Donations By Date - Fund	JAC	20/01/2005
Donations By Analysis Code	JAC	20/01/2005
Donations By Source Code	Jac	20/01/2005
Donations By Account Code	JAC	20/01/2005
Supporters By Reason Giving Over £100	JAC	20/01/2005
Donations under 400 from Individuals	JAC	20/01/2005
test for demo	jac	01/03/2005
test for demo - received amounts	JAC	01/03/2005
telephone numbers	JAC	14/03/2005
Select List - Supporters	JAC	14/03/2005
Role Code Breakdown	JAC	19/12/2006
Test for neil - Major Donors	Jac	30/10/2007
test	JAC	07/11/2007
test	jac	23/11/2007

Record: 1 of 18

Report: Basic Supporter Query

Modify Report New Report Edit All Reports

Requery List Exit

Full facilities to mail merge documents and produce graphs are also included within the software.