



CHARITease

CHARITease is a fully functional Supporter Management system from JA Computer Solutions Ltd.

The screenshot shows the 'Main Menu' window of the CHARITease software. The title bar reads 'Main Menu'. The interface includes the CHARITease logo (a piggy bank) and the text 'CHARITease' in a large blue font. To the right, it says 'JA Computer Solutions Ltd' and '© Copyright JA Computer Solutions Ltd 2005. Version 5'. A central button labeled 'Maintain Supporters' is highlighted. Below this are several functional buttons arranged in a grid: 'Create Receipt Batches', 'Print / Close Receipt Batches', 'Print Letters From Batches', 'Post Regular Gifts', 'Post Batches to Accounts', 'Generate/ Print Tax Claim', 'Direct Debit Admin', 'Event Administration', and 'Appointments'. Further down are 'Charity Details' (with a dropdown arrow) and 'Maintain Details', 'Maintain Users', and 'Query / Reporting'. At the bottom, a warning box states: 'Warning: This computer program is protected by copyright law. Unauthorised reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.' Below the warning, it shows 'Registered To: Demonstration Charity' and 'Users: 2'.

Full Fundraising functions are included within the system:

- Donations (One Off and Regular)
- Event Administration
- Direct Debit Administration
- Event Administration
- Full Communication suite for letters / emails etc
- Segmentation via Fund / Campaign / Event codes
- User defined Attributes per Supporter
- Multiple Addresses and de-duplication procedures



CHARITease

Each Supporter record is accessed via the Supporter Entry screen and all details of the Supporter can be updated.

A floating search window allows for Supporters to be quickly and easily identified.

supporter - search : Form

ID: Name: Owen, Alan, Mr

Details of the Supporter are shown and various tabs show the different areas of the record which can be accessed.

Supporter Entry : Form

Coll Tin | Other Dets | Family | Trust | Events | Volunteer | Pictures | Attributes | Note Pad
Supporter | Further | Contact | Comms | Appt | Receipts | Mailings | Memb | Reg Gifts

ID: 6367 Type: Individual Critical Info:
Status: Active Status Date: 15/08/2005
Solicit Code: AVAIL Source: Title: Mr
First Name: Alan Second Names: J Last Name: Owen Suffix:
Mailname: Mr A J Owen Salutation: Mr Owen

Address: The Bungalow
Preferred
Fossebridge
xnifn
Town: Cheltenham
County: Gloucestershire
Postcode: Address Type:
Country:
Region: South West
Telephone Number:
Work Tel Number:
Email address:
Fax Number:
Record: 1 of 1

Reason:
DON Donor
ADVISCOM Advisory Committee
FORMSTAF Former Staff
MEDIA Media
ADVISCOM Advisory Committee
House: H Class Of:
Date Entered:
Date Graduated:
Date Left:

Gift Aid Form Received Gift Aid Tax Claimable From: DP Received
 Gift Aid reclaim name: Nontaxpayer

Date Created: 15/08/2005 Date Updated: 30/03/2006 Updated By: Admin
ID: 6367 Mailname: Mr A J Owen
Comms: 32 Donations: 35 £3,739.00 Associations: 3 Select List Name:

Record: 1 of 1 (Filtered)

From the main tab, multiple addresses and details of the number of donations made, the number of communications made and who last updated the Supporter.



CHARITease

Full receipt history details can be viewed from the Supporter Entry screen.

Receipt History

Supporter ID: 6367
Total Amount Donated: £1,749.00
Minimum Amount Donated: £10.00
Date of First Donation: 01/01/2003
Number of Donations: 24

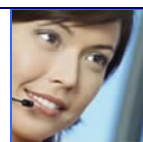
Total Donations (including Gift Aid): £2,054.74
Total Gift Aid Claimed: £415.74
Maximum Amount Donated: £250.00
Date of Last Donation: 01/11/2004

| Date | Amount | Donation | Gift Aid | Pay Method | Fund Code | Analysis Code | Account Code | Source | Batch | Order |
|-----------|---------|----------|----------|------------|-----------|---------------|--------------|--------|-------|-------------------------------------|
| 01-Jan-03 | £100.00 | £85.00 | £23.97 | CASH | GENERAL | TRAN | DON | EQUIP | 0 | <input checked="" type="checkbox"/> |
| 01-Jan-03 | £100.00 | £85.00 | £23.97 | CASH | GENERAL | TRAN | DON | EQUIP | 0 | <input checked="" type="checkbox"/> |
| 01-Jan-03 | £100.00 | £85.00 | £23.97 | CASH | GENERAL | TRAN | DON | EQUIP | 1 | <input checked="" type="checkbox"/> |
| 10-Oct-03 | £123.00 | £123.00 | £34.69 | CASH | GENERAL | TRAN | DON | BUS | 0 | <input type="checkbox"/> |
| 10-Oct-03 | £123.00 | £123.00 | £34.69 | CASH | GENERAL | TRAN | DON | BUS | 1 | <input type="checkbox"/> |
| 10-Oct-03 | £123.00 | £123.00 | £34.69 | CASH | GENERAL | TRAN | DON | BUS | 0 | <input type="checkbox"/> |
| 01-Nov-03 | £10.00 | £0.00 | £0.00 | SO | GENERAL | MARAT03 | DON | BUS | 0 | <input type="checkbox"/> |
| 01-Nov-03 | £10.00 | £0.00 | £0.00 | SO | GENERAL | MARAT03 | DON | BUS | 0 | <input type="checkbox"/> |
| 10-Nov-03 | £250.00 | £250.00 | £70.51 | CASH | GENERAL | JAZZ03 | DON | GEN | 0 | <input type="checkbox"/> |
| 10-Nov-03 | £250.00 | £250.00 | £70.51 | CASH | GENERAL | JAZZ03 | DON | GEN | ? | <input type="checkbox"/> |

The screen shows a summary of the Supporters donations to your organisation and then a breakdown of the donations received.

The Summary information includes:

- Number of donations
- Total Amount donated
- Date of first / last donation
- Minimum / maximum donation amounts
- Total Gift Aid claimed on the donations
- Total worth to the Charity of the Supporter





CHARITease

Membership details are recorded per Supporter with multiple memberships per Supporter allowed.

| | | |
|-------------------|---|---|
| Membership Number | <input type="text" value="9"/> | |
| Joining Date | <input type="text" value="12/07/2006"/> | |
| Paid To Date | <input type="text" value="12/07/2006"/> | |
| Membership Type | <input type="text" value="A"/> | Subscription: <input type="text" value="£10.00"/> |
| Membership Status | <input type="text" value="A"/> | Payment Method: <input type="text" value="CASH"/> |
| Letter Code | <input type="text" value="ANNMEN"/> | Date Letter Printed: <input type="text"/> |
| Letter notes | <input type="text"/> | |

Record: 1 of 1

Standard letters can easily be generated and with a subscription update, all increases in subscription amounts can be increased using one routine.

update subscriptions : Form

This Routine Updates The Active Members With a Debit Entry into their Account History so that the account is correct at the start of the year. Please ensure that the Subscription Amounts are correct before running this routine by checking them in the screen below. Once they are correct, click the tick button to create the entries.

| Category | Description | Subscription |
|----------|--|--------------|
| | Corresponding | £0.00 |
| D | Deceased | £0.00 |
| E | Extraordinary | £120.00 |
| ENP | Extraordinary with on-line Journal only (UK) | £102.00 |
| EO | Extraordinary Overseas | £140.00 |
| EO NP | Extraordinary Overseas with on-line Journal | £122.00 |
| HM | Honorary | £0.00 |
| MM | Married Man | £145.00 |
| MMNP | Married men with on-line Journal | £122.00 |





CHARITease

Membership routines which allow for records to be easily and quickly selected are included to allow for branch listings and labels to be produced.

Multiple Records

| Categories | UK Branches |
|---------------------------------------|------------------|
| Extraordinary | Caledonian |
| Extraordinary Overseas | Cambrian |
| Extraordinary Overseas with on-line | East Mercian |
| Extraordinary with on-line Journal or | East Saxon |
| Honorary | Irish |
| Married Man | Mid Southern |
| Married men with on-line Journal | North of England |
| Married Women | North West |
| Married women with on-line Journal | South East |
| Ordinary | Thames Valley |

Individual Records

Enter Membership Number: 0

Enter Surname: []

Find Matches

Matches Found

- Aaron, Dr F E
- Abbas, Dr A, M A
- Abbott, Dr M
- Abbott, Dr D
- Abbott, Dr Cedric R Cedar Cott

Enter Number of Labels Required: 1

Create Selection

Selected Records

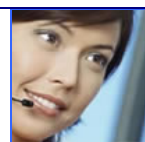
| | |
|------|------------------------|
| 2475 | Dr Robert A Owen |
| 947 | Professor David A Owen |

2 Record(s) Selected

Multiple membership categories and branches can be included as well as individual Supporters.

This selection option is tailorable to meet the needs of even the most complex Membership organisations.

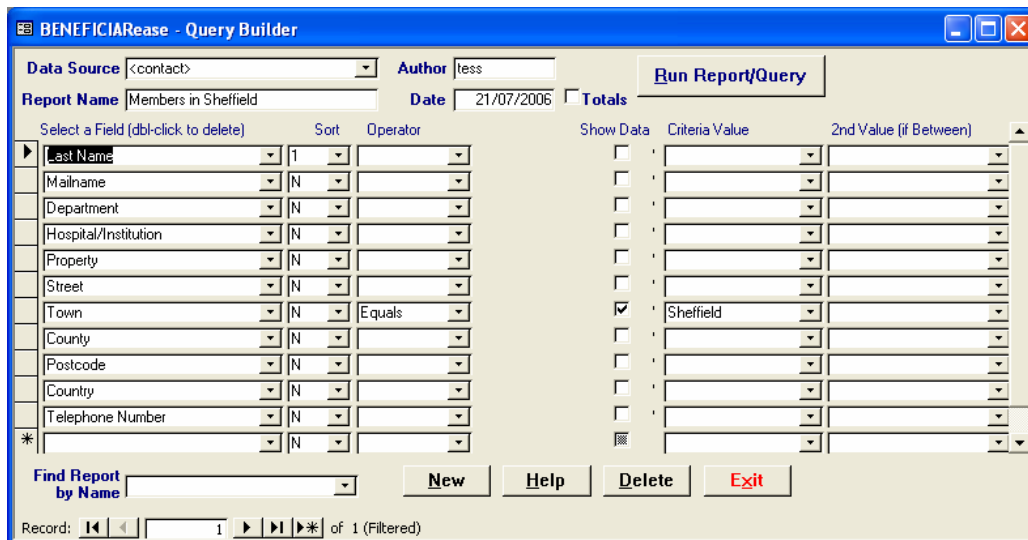
By utilising the listings and labels option, users do not need to learn complex report writing tools or SQL statements. They choose their selection and click a button for the output.



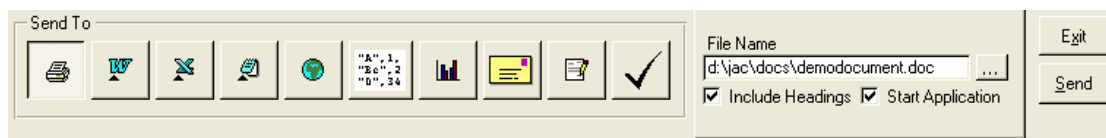


CHARITease

A standard query and report writer is included with CHARITease allowing the user to choose from a pre-defined list of data sources for easy selection. The Microsoft Query interface does not need to be made available to the user.



Full facilities are available for selections with users choosing the fields from a drop down list, the operator and the criteria.



The results are shown to the user and can be output to Word, Excel, CSV, Mail Merge, Labels and Email (via outlook).

The communication suite can be updated directly from the query writer and event invitations created.



CHARITease

Generating Gift Aid is an important part of any Fundraising database and CHARITease allows you to generate a claim quickly and easily.

Generate Tax Claim

This form generates and Prints a Tax Claim under the new Gift Aid Scheme. It will select all receipts who are eligible for Gift Aid and tag a unique reference to them. Enter a unique reference for this claim e.g. JUNE02 and a date range which the system uses to select the receipts.

Tax Reference:

Date Generated: By:

Date From: Date To:

Buttons: +!, Revenue, Client, [Print]

Record: of 1

By allocating a unique reference and entering the date range to run the claim for, CHARITease will generate the claim for all records that are eligible to be included.

R68A

SUBSTITUTE R68A(New Gift Aid) Schedule to Charity Repayment Claim

Reference: XR21763

Schedule of New Gift Aid donations made by individuals resident in the UK

| Name of donor | Date of payment or last payment in series | Total donation(s) Received |
|------------------------------------|---|----------------------------|
| Sheet number 1 | | |
| Carried Forward from Previous Page | | £0.00 |
| 1 | 10/11/2003 | £1,374.00 |
| 2 Miss K Webster | 10/11/2003 | £458.00 |
| 3 | 11/01/2004 | £110.00 |
| 4 Mrs Tara Owen | 19/02/2004 | £200.00 |
| 5 | 22/03/2004 | £185.00 |
| Total income | | £2,327.00 |

Page: 1 of 1

With full R68A Production, the form can be printed and sent directly to the Inland Revenue.



CHARITease

Full Event administration is included within CHARITease allowing for invitations to be sent to Supporters and their responses recorded.

Analysis Code Entry

Main Details | Event Details | Event Appointments | Pictures | No Reply | Accepted | Declined

ID: JAZZ03 Description: Jazz Jamboree 2003

Date Started: Date Closed: Event:

Where It Went:

Total Mailed: 100 Target: £3,000.00 Percentage response: 6

Total Cost: £2,500.00 Profit: £600.00

Giftaidable:

| | | | |
|----------------------|------------|-------------------------|------------|
| Total Amount Raised: | £3,100.00 | Total Gift Aid Claimed: | £282.05 |
| First Receipt Date: | 10/11/2003 | Last Receipt Date: | 15/11/2005 |
| Minimum Amount: | £100.00 | Maximum Amount: | £2,000.00 |
| Number of Donations: | 6 | | |

event - search : Form
Name:

Record: 1 of 4

Future events can be created from Supporters who attended a previous event. Invitations can be sent via Word or via email.

Analysis Code Entry

Main Details | Event Details | Event Appointments | Pictures | No Reply | Accepted | Declined

Select All De-Select All

| Select | Supporter | Contact | Response | Response Date | No Of Tickets | Amount Charged | Amount Received | Date Received | Status | Notes |
|-------------------------------------|---------------------|---------|----------|---------------|---------------|----------------|-----------------|---------------|--------|-------|
| <input checked="" type="checkbox"/> | Bentinck, V M, M | | No Reply | | 0 | £0.00 | £0.00 | | | |
| <input checked="" type="checkbox"/> | Bentley, Diana, I | | No Reply | | 0 | £0.00 | £0.00 | | | |
| <input checked="" type="checkbox"/> | Bentley, Kate, M | | No Reply | | 0 | £0.00 | £0.00 | | | |
| <input checked="" type="checkbox"/> | Bentley, Sarah, | | No Reply | | 0 | £0.00 | £0.00 | | | |
| <input checked="" type="checkbox"/> | Benton, J C, Mr | | No Reply | | 0 | £0.00 | £0.00 | | | |
| <input checked="" type="checkbox"/> | Berlis, Victoria, I | | No Reply | | 0 | £0.00 | £0.00 | | | |

Number of Invitees: 2959

Record: 1 of 4



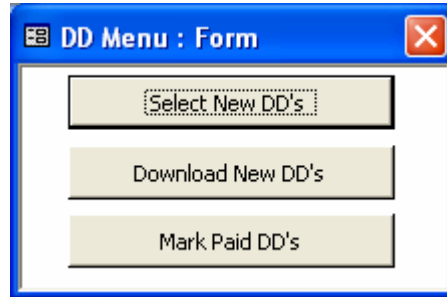
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CHARITease

Regular Gifts are handled in CHARITease via a Regular Gift Instruction system. Direct Debits can be sent via Microbank to BACS for processing, with full facilities for updating records where the direct debit has failed.



Regular Gifts are posted quickly and easily on receipt of the bank statement as CHARITease keeps track of the payments due and presents them in one screen.

| Gift Number | Supporter Number | Supporter Name | Next Payment Date | Amount Expected | Gift Type | Status | No Payments | Payments Made | Post Payment |
|-------------|------------------|----------------|-------------------|-----------------|-----------|--------|-------------|---------------|--------------------------|
| 135 | 2534 | Mrs Tara Owen | 01/06/2005 | £100.00 | DON | A | 396 | 2 | <input type="checkbox"/> |

Once the payment has been received, the entry is ticked and the donation is automatically updated. CHARITease will also move the date forward for the next payment (Weekly / Monthly / Quarterly / Annually)



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CHARITease

All donations are handled in batches, with users having batches allocated to them. Each batch can then be printed and closed before posting the donation information to an Accounts package.

Batch Print / Closure

Use this form to Print Batch Details and to Close Batches. This Routine will NOT post batches to Accounts. Batches can be printed as many times as needed, but can only be closed ONCE.

| | | | |
|--------------------|------------------|-------------|-------|
| Date Opened: | 12 November 2003 | Opened By: | JAC |
| Date Closed: | 20 November 2003 | Closed By: | JAC |
| Date Printed: | 09 April 2005 | Printed By: | Admin |
| Batch Number: | 1 | Centre: | JAC |
| Batch Description: | Misc Entries | | |

Record: 1 of 6

Batch listings are produced by the system allowing for the user to check their entries before posting.

Batch Print : Report

BATCH DETAIL PRINT

| | | | | | | | |
|--------------------------|------------------|------------------------|--------------|--|--|--|--|
| Batch Number: | 1 | Batch Description: | Misc Entries | | | | |
| Date Opened: | 12 November 2003 | Opened By: | JAC | | | | |
| Date Closed: | 20/11/2003 | Closed By: | JAC | | | | |
| Date Posted to Accounts: | | Posted to Accounts By: | | | | | |

| Supporter ID: | Maidname: | Date: | Amount: | Fund Code: | Analysis Code: | Account Code: | Letter Code: |
|---------------------|-------------|-----------|---------|------------|----------------|---------------|--------------|
| 6367 | Mr A J Owen | 01-Jan-03 | £100.00 | GENERAL | TRAN | DON | MYST03 |
| 6367 | Mr A J Owen | 10-Oct-03 | £123.00 | GENERAL | TRAN | DON | |
| Batch Total: | | | £223.00 | | | | |

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CHARITease

Conclusion

CHARITease has many more routines and screens than can be recorded in this document. To see the full potential of CHARITease and how it can help your organisation, an onsite demonstration can be arranged.

All demonstrations are free and can be projected onto a large screen to many users.

CHARITease can also be tailored to meet the needs of an organisation with many clients asking for different screens and routines. JAC are happy to undertake any development that is needed.

For smaller organisations, CHARITease can be left as an Access database, with the larger organisations utilising SQL Server.

Full assistance during implementation, including training is included as well as ongoing support.

CHARITease now handles over 500,000 Supporter records world wide and has been responsible for claiming over £750,000 in Gift Aid.

Join the ever increasing number of Charities that are using the power of CHARITease every day.

