

**CharityTracker** is the easiest way for organizations to collaborate, reduce fraud and focus their resources on people with real needs.

**CharityTracker** is a secure website that allows benevolence agencies to stay on the same page. Because it is quick and easy to learn and use, agencies have no problem keeping track of who is getting help in the community.

**As featured in:**

*Church Executive Magazine*  
*Christian Computing Magazine*  
*Church Solutions Magazine*  
*Church & Worship Technology Magazine*  
*Christian Newswire*

**Built by a Community...for a Community.**



United Way  
of Northwest Alabama

October 12, 2007

Dear Friends:

We are pleased to share with you about an easy-to-use, affordable “shared case management” software that has brought unity to our community’s emergency assistance service providers and has saved our community countless dollars in duplicated assistance. At the foot of this letter is contact information for Simon Solutions, a local software company that met with us more than a year ago to listen to our needs and then delivered far beyond our expectations.

For months we had researched available “shared case management” tools and found everything on the market to be complicated and/or cost-prohibitive. To frustrate matters even more, our United Way’s primary service area includes four cities in two separate counties with a river that runs between them. Needless to say, we deal with a lot of “territorial” issues even among organizations with similar missions. We’re sure that never happens in your service area (please feel free to laugh out loud here.)

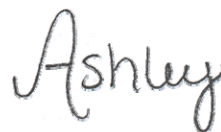
Simon Solutions brought us a web-based software that has taken away all of the arguments for why our local agencies and faith-based organizations could not work together and share information about the assistance they are providing and while still maintaining their own rules, regulations and assistance objectives. We now have more than thirty organizations using the software regularly and we still don’t have anyone, even among those who were skeptical at first, who has anything negative to say about it.

As a United Way that has found great benefit in the ideas and solutions shared by other United Ways, we wanted to let you know how much our community has benefited from CharityTracker. Please take a moment to visit the website. You will be pleasantly surprised.

Sincerely,



Tina Glasgow Scott  
Executive Director



Ashley Butler  
211 Information and Referral Specialist

300 Industry Street • Florence Alabama 35630 • Phone (256) 764-5892 • Fax (256)764-0088 • [www.uwshoals.org](http://www.uwshoals.org)

## Why are all these Assistance Providers in one community using CharityTracker™?

United Way of Northwest Alabama  
Colbert-Lauderdale Baptist Association  
AL Dept. of Public Health, Laud. Co.  
First Presbyterian Church - Florence  
Woodmont Baptist Church  
First United Methodist Church of Sheffield  
Community Action Agency  
First Baptist Church of Sheffield  
Loaves & Fishes (Christ Chapel)  
Shoals Family Success Center  
The Salvation Army  
CrossPoint Church of Christ  
First Christian Church  
Calvary Baptist Church  
First Southern Baptist Church  
Underwood Baptist Church  
American Red Cross  
Abundant Grace Church, Inc.  
Faith Church  
St. Vincent De Paul Society  
Edgemont Angel Food Ministries  
Creekside Church  
Rogersville United Methodist Church  
Give A Kid A Chance  
The Help Center  
Leighton Baptist Church  
Highland Park Baptist Church  
First Baptist Church-Center Star  
Parkview Baptist Church  
Tuscumbia Church of Christ  
Colbert Caring Center, Inc.  
Safeplace, Inc  
Forest Hills Baptist Church  
Highland Baptist Church  
First Cumberland Presbyterian Church  
Magnolia Church of Christ  
CrossRoads Baptist Church

### Because it's...

- Simple to use
- Easy to implement
- Affordable

“CharityTracker has brought unity to our community’s emergency assistance service providers and has saved our community countless dollars in duplicated services. For months, we had researched available management tools and found everything on the market to be complicated and/or cost prohibitive. CharityTracker has taken away all of the arguments for why our local agencies and faith-based organizations could not work together and share information about the assistance they are providing.”

-Tina Scott,  
Executive Director  
United Way of Northwest Alabama

### How it benefits you?

Saves Time and Money  
Eliminates Duplications  
Easy System-wide Communication  
Pre-Screen Cases  
Anywhere – Anytime Access  
Better Accountability  
HIPAA Compliant  
Quick Reporting  
Measurable Results

## Why CharityTracker

It's easy to use, secure and allows your organization to focus resources on people with **real** needs.

When facilitating benevolence work, one common theme tends to surface: **Are resources being allocated appropriately or are resources being taken advantage of?** At no other time was this more apparent than when Hurricane Katrina devastated the gulf coast. When Katrina hit, our community in Northwest Alabama had approximately 330 families needing assistance. Our local agencies and churches were doing the best they could to accommodate the large number of people. It was apparent that these agencies were not being informed that some families were getting aid from elsewhere. This caused resources to dry up faster than they would have if there had been a way to track who received assistance and the organization they received it from. The lack of communication in our area highlighted the need for something like CharityTracker.

### CharityTracker is easy to use

CharityTracker was developed to keep you doing what you do best, helping people. Unlike other bloated programs of this nature that have too many features that can be distracting, CharityTracker was designed to get you simply and effectively tracking assistance right away.

### CharityTracker is secure

CharityTracker is as secure as it gets. Using the same internet security methods used by banks and the federal government, you never have to worry about unauthorized people looking at your information. We employ 128bit SSL encryption as well as an Adobe Flash environment which keeps search engine bots and curious eyes away from your sensitive information.

### Is CharityTracker right for your organization?

Do you want to know the assistance history of the people you serve? Would you and others in your community like to reduce or eliminate duplicate services? Does your community have a desire to work collaboratively to share information and resources to help those who need it the most?

If your desire is to make a difference in people's lives, and make a lasting an positive change in your community, then CharityTracker is the perfect solution for you.

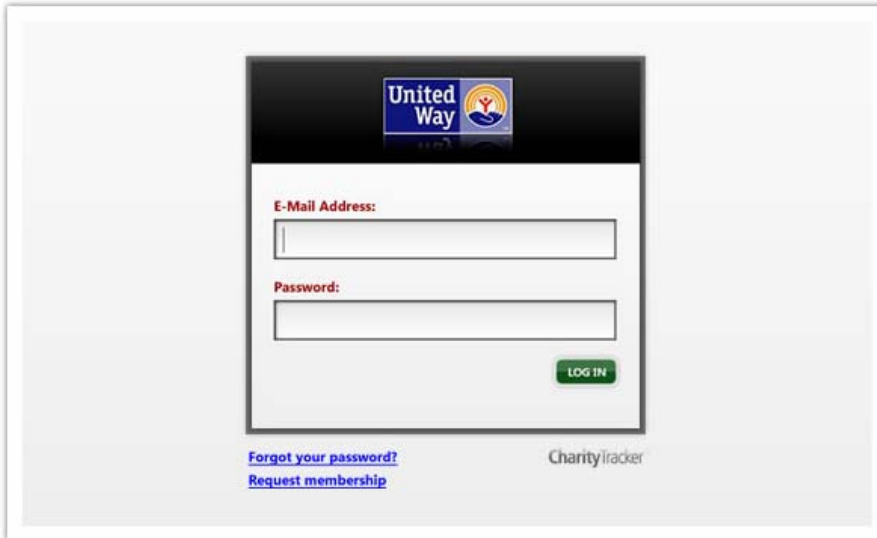


The image shows a screenshot of the CharityTracker web application interface. The interface is displayed over a background image of hands holding a globe. The CharityTracker logo is prominently displayed on the left side of the interface. The main content area shows a user profile for 'Elizabeth Dumas' with various fields for contact information, including phone numbers, email addresses, and a list of addresses. The interface is clean and organized, with a navigation menu on the left and a main content area on the right.

**CharityTracker** is the easiest way for organizations to collaborate, reduce fraud and focus their resources on people with real needs.

Try **CharityTracker.net**

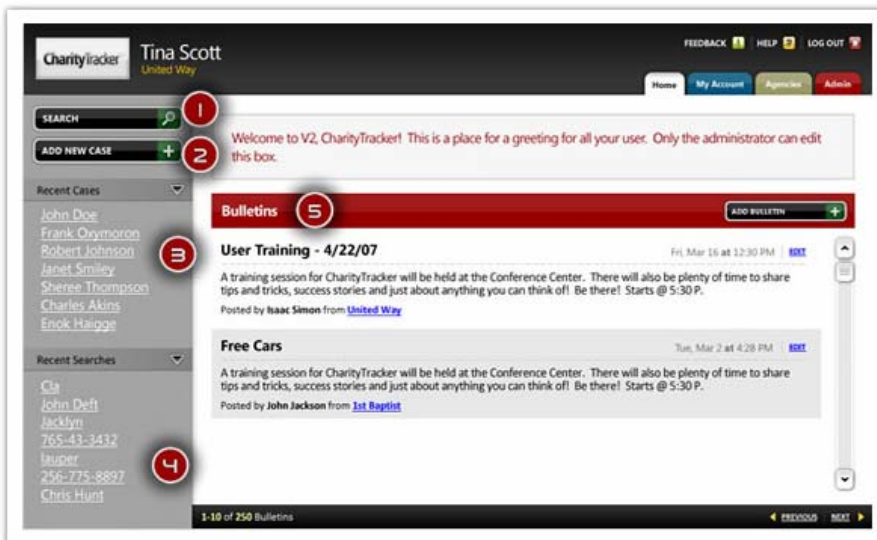
Take a look around and **see** what makes CharityTracker such a great idea.



### Login Screen

CharityTracker is as secure as it gets. Using the same internet security methods used by banks and the federal government, you never have to worry about unauthorized people looking at your information.

With a CharityTracker subscription, five agents from each agency are allowed access to the system. Additional logins are available upon request for an additional fee.



### CharityTracker Overview

CharityTracker is the easiest way for organizations to collaborate, reduce fraud, and focus their resources on people with real needs. Because it is easy to learn and use, agencies have no problem keeping track of who is getting help in the community.

Easily search for an existing case (1), or add a new case (2). Take a look at recently viewed cases (3) or keep track of past searches (4). Keep everyone informed across your network with bulletins (5).

Take a look around and **see** what makes CharityTracker such a great idea.

The screenshot shows the CharityTracker interface for a user named Tina Scott. The main content area displays the 'Personal Info for Elizabeth Janet Smarties'. The profile includes contact information (123 Front St., Florence, AL 35630), phone numbers, and various identifiers (DOB: 3/55/1984, SSN: 123-45-6789). There are checkboxes for 'No ROI', 'No DOB', 'Homeless', and 'At risk of being homeless'. A 'History of Modification' section shows recent updates to the phone number and address. On the right, a sidebar shows a summary of the case with a red circle (1) next to the name 'Elizabeth Smarties'. Below the name is a vertical bar with five categories: Assistance (10), Household (13), Notes (43), Alerts (1), and Personal Info.

### Cases

Every person you help is recorded in CharityTracker as a case (1). Within each case you can view all past assistance records (2) and keep track of who's who in relationship to each case (3).

You and everyone else who views each case can attach notes (4), or alerts (5) that give a heads up to any other agents.

The screenshot shows the CharityTracker search interface. At the top, there is a search bar with a red circle (1) next to it. Below the search bar are input fields for 'First Name', 'Last Name', 'DOB', 'SSN', 'Address', 'City', 'State', 'PHONE #', and 'OTHER ID'. A 'SEARCH' button is located to the right of these fields. Below the search bar, there is a section for search results. The first result is '1. Elizabeth Janet Smarties' with a '96% Match' score. The second result is '2. Don Julio' with a '70% Match' score. A red circle (2) is next to the search bar, and a red circle (3) is next to the search results list. At the bottom, there is a pagination bar showing '1-10 of 250 Results' and 'PREVIOUS NEXT' buttons.

### Search

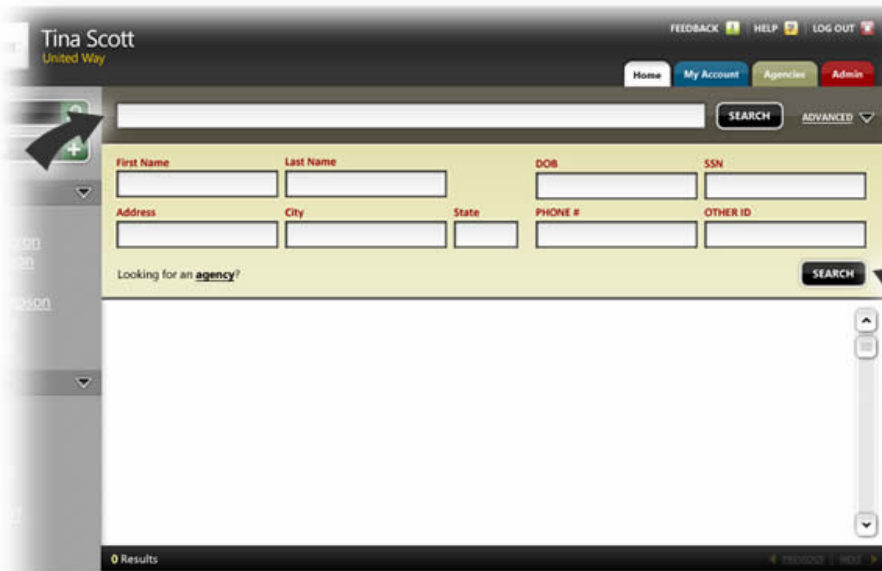
CharityTracker lets you search how you want to. Want to do a simple search? (1) No problem!

Need to narrow your search results? The advanced search feature (2) displays percent matches (3) to help find exactly who you're looking for.

## Share Information with Agencies in your Community.

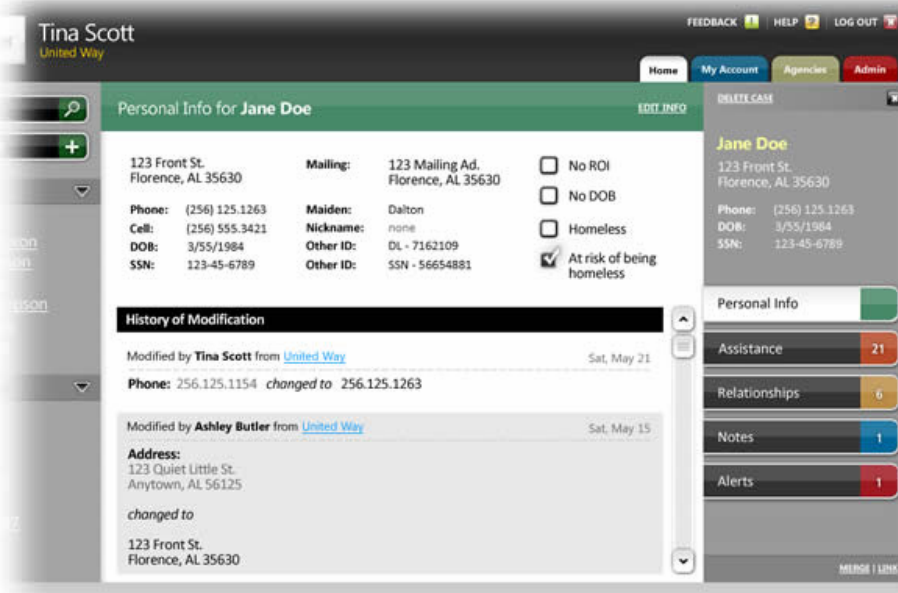
Anyone in your network can view or add valuable case and assistance information.

1



**Use the Basic or Advanced Search features to see if a case is already in the system**  
You can create a new case if there is no record in the system

2



**The Personal Info page is where you keep track of identification and contact info**  
CharityTracker keeps a record for each time this info is edited.

3

Tina Scott  
United Way

FEEDBACK HELP LOG OUT

Home My Account Agencies Admin

DELETED CASE

Assistance for Jane Doe

Show assistance for...  Elizabeth Smarties  Living With  Related

**Ashley Butler**  
United Way  
Fri, Aug 18 at 2:14 PM | EDIT  
Jane came in asking about her utility bill. She said that her husband just recently left and said she had to do things on their own. **\$ 120.00**  
Received for **Utilities** by **Jane Doe**

**Smith Stevenson**  
Salvation Army  
Fri, Aug 16 at 12:30 PM | EDIT  
Paid rent for the month of April. **\$ 254.00**  
Received for **Housing** by **James Doe**

2 Results

Jane Doe  
123 Front St.  
Florence, AL 35630  
Phone: (256) 125-1263  
DOB: 3/53/1984  
SSN: 123-45-6789

Personal Info

Assistance 2

Relationships 3

Notes 1

Alerts 1

**The Assistance page is where you keep track of assistance given in a case**  
You can track assistance given to an individual, a household, or a relative.

4

Tina Scott  
United Way

FEEDBACK HELP LOG OUT

Home My Account Agencies Admin

DELETED CASE

Relationships with Jane Doe

ADD RELATIONSHIP

**Living with Jane Doe**

**John Doe** - son  
10 years old  
EDIT DELETE

**Janet Doe** - daughter  
8 years old  
EDIT DELETE

**Related to Jane Doe**

**James Doe** - husband  
39 years old  
EDIT DELETE

3 Results

Jane Doe  
123 Front St.  
Florence, AL 35630  
Phone: (256) 125-1263  
DOB: 3/53/1984  
SSN: 123-45-6789

Personal Info

Assistance 2

Relationships 3

Notes 1

Alerts 1

**The Relationships page is where you keep track of how cases are related**

5

The screenshot shows the 'Notes for Jane Doe' page in the CharityTracker interface. At the top, the user 'Tina Scott' is logged in. The page header includes 'Home', 'My Account', 'Agencies', and 'Admin' buttons. A search bar and 'ADD NOTE' button are visible. The main content area displays a note from 'Ashley Butler' (United Way) dated 'Fri, Aug 16 at 12:30 PM'. The note text reads: 'Jane recently became the main breadwinner in the household. She has two children.' To the right, a sidebar shows 'Jane Doe' profile information: '123 Front St. Florence, AL 35630', 'Phone: (256) 125.1263', 'DOB: 3/55/1984', and 'SSN: 123-45-6789'. Below this, a vertical menu lists 'Personal Info', 'Assistance' (2), 'Relationships' (3), 'Notes' (1), and 'Alerts' (1). At the bottom, it shows '1-10 of 250 Results' and navigation arrows.

The Notes page is where you keep a collective understanding of the case

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The screenshot shows the 'Alerts for Jane Doe' page in the CharityTracker interface. The user 'Tina Scott' is logged in. The page header includes 'Home', 'My Account', 'Agencies', and 'Admin' buttons. A search bar and 'ADD ALERT' button are visible. The main content area displays an alert from 'Tina Scott' (United Way) dated 'Fri, Aug 16 at 12:30 PM'. The alert text reads: 'Jane came in asking about her utility bill. She has a history of not being completely honest about her finances.' To the right, a sidebar shows 'Jane Doe' profile information: '123 Front St. Florence, AL 35630', 'Phone: (256) 125.1263', 'DOB: 3/55/1984', and 'SSN: 123-45-6789'. Below this, a vertical menu lists 'Personal Info', 'Assistance' (2), 'Relationships' (3), 'Notes' (1), and 'Alerts' (1). At the bottom, it shows '1 Result' and navigation arrows.

The Alert page is where you notify other agencies of urgent information about the case

## Frequently Asked Questions

### **Who can subscribe to CharityTracker?**

Any verifiable 501c Agency/Organization or Church/Religious Organization with a benevolence program.

### **I am only using 1 or 2 of my logins, can I let another agency or organization use the remaining?**

Each subscription is for only one organization or agency. Each organization or agency must have their own subscription to get access to CharityTracker. Subscription sharing is not allowed.

### **What do I need to use CharityTracker?**

Any browser with Adobe Flash Player installed.

### **What browsers does CharityTracker work in?**

Firefox, Safari, and Internet Explorer.

### **How long until my agency/organization can use CharityTracker?**

Typically, CharityTracker will be ready to use within 24-48 hours. Community implementation depends on your policy and procedures, and how quickly you setup CharityTracker.

### **I have a standalone CharityTracker. Can I join other Community Networks?**

To join a Community Network, you must subscribe via that Community Network's website. The approval process may take up to 48 hours to complete. Your credit card will not be charged until you are approved by the Community Network administrator.

### **How secure is CharityTracker?**

CharityTracker is as secure as it gets. Using the same internet security methods used by banks and the federal government, you never have to worry about unauthorized people looking at your information. We employ 128bit SSL encryption as well as an Adobe Flash environment which keeps search engine bots and curious eyes away from your sensitive information.

### **What are the system requirements for CharityTracker?**

A PC or MAC built in the last 4 or 5 years should be good enough. You will need to make sure you have the latest version of your browser, and the latest version of Adobe Flash installed on your system.

### **Who has access to my data?**

Only those who are part of your local CharityTracker community assistance network will have access to your information.

### **Who owns the data we input into CharityTracker?**

You own all data and information entered into CharityTracker. Your information is available in a file upon request.

### **Does Simon Solutions provide training for CharityTracker?**

Yes. Our online training materials include FAQ, training videos, and an online support forum. Onsite training is available for an additional fee. Just email us.

### **What database engine does CharityTracker utilize?**

The latest version of MySQL.

## **Is our data backed up in case of an emergency?**

Data is backed up frequently and written to multiple hard drives. In the event of an emergency, we can perform full backup recovery.

## **Where is our data hosted?**

We host your data in one of the most state of the art facilities in the United States right on the internet backbone.

## **Can we export our data if we don't want to use CharityTracker anymore? What format is the export in?**

Yes. Should you decide to stop using CharityTracker, we can export your data to a file.

## **Can we install CharityTracker on our own server?**

We don't offer an installable version of CharityTracker. CharityTracker is a hosted service. We maintain the servers, the security, all the updates and improvements so you don't have to worry about anything.

## **Do you provide phone support?**

We provide support via email, forum, FAQ, and video tutorials. We do not provide support over the phone. We usually respond to every email within just a few hours of receiving it. We also make sure that a knowledgeable Simon Solutions employee or a company owner answers the email.

## **Are there signup, termination, or hidden fees we should know about?**

No. Never. We don't like extra or hidden fees, it's just bad business.

## **How does your refund policy work?**

CharityTracker fees are based on a month to month pay as you go subscription. We do not give refunds unless you have paid for a year in advance, then your refund will be pro-rated.

## **Can we pay for CharityTracker a year in advance? Do you accept payment by check?**

Yes, you can pay for a year in advance and receive a 10% discount. We are currently working on accepting e-check payments.

## **Is CharityTracker available in other languages besides English?**

Not at this time. We do have tentative plans for other language versions as the market dictates.

## **What if I lose my password or can't remember it?**

Simply visit the web address for **your** account (ex. [simonsolutions.charitytracker.net](http://simonsolutions.charitytracker.net)) and click "Forgot your password?".

## **You don't have to have an IT department to use CharityTracker.**

We've done all the hard work so you can get back to doing what you do best - helping people.

- We host it all, no dealing with purchasing servers
- We do all the maintenance, no need to hire a web developer
- We are constantly improving, you don't have to keep paying for upgrades

# CharityTracker™

## Pricing

No contracts, no setup fees and you can cancel your account at **any** time.

	<b>Standalone Version</b> This version is perfect for any agency that wants to <b>only</b> track their assistance.	<b>Community Version</b> This version allows <b>multiple agencies</b> to log in and track community-wide assistance.
Monthly Fee	\$15/mo	\$15/mo
Unlimited Cases	✓	✓
Assistance Tracking	✓	✓
Bulletins	✓	✓
Case Notes	✓	✓
Case Alerts	✓	✓
128 Bit SSL Security	✓	✓
Share assistance records with other agencies	✗	✓
<a href="#">SIGN UP</a>		<a href="#">SIGN UP</a>

**Want to try CharityTracker free for 14 days? [Click here to sign up for free](#)**

The free trial is for the **standalone version** and allows you to have up to 5 Logins and unlimited cases.

"We needed custom software in a **hurry**. Simon Solutions delivered an easy-to-use, yet powerful **solution**."

- Tina Scott, **Executive Director** United Way of Northwest Alabama



## Pricing

No contracts, no setup fees and you can cancel your account at **any** time.

### **What's the difference between the standalone version and the community version?**

The standalone version is for use by a single organization, to track charitable assistance within that organization. The community version allows for multiple organizations to share their assistance records.

### **What am I getting for \$15 a month?**

You get unlimited access for 5 agents in your organization. You also get secure, unlimited data storage for all your assistance history. And with the community version, you have the ability to collaborate with other organizations in your community.

### **I have more than 5 people in my organization that need access to CharityTracker. Can they share logins or do I have to get more?**

We cannot allow people to share login access. Each person agrees to the Terms of Use to preserve the security and accountability of each agent using the system. Additional logins can be purchased at the rate of 5 logins for \$10/month. Just email us to upgrade your account.

### **What types of payment do you accept?**

We accept Visa, MasterCard, American Express and Discover. We are currently working on accepting e-check payments.

### **Can we pay for CharityTracker a year in advance?**

Yes, you can pay for a year in advance and receive a 10% discount.

### **What types of payment do you accept?**

We accept Visa, MasterCard, American Express and Discover. We can not accept any other form of payment.

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### **Couldn't find your answer?**

Check our frequently answered questions on our [help](#) page. Feel free to visit our support [forum](#) or [send us an e-mail](#) with any questions you may have. We're here to help.

To get started, call us or go to our website today!

[www.CharityTracker.net](http://www.CharityTracker.net)



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To find out more, schedule a “**LIVE**” Online Seminar today!

<https://simonsolutions.webex.com>