



FLEXQUEST®

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Spell check your letters. For those who use Microsoft Word as their word processor, Flexquest can now utilize Word's fast and powerful spell checker directly from the Letters & Email form. You can correct your letters seamlessly from within Flexquest just by clicking on the spell check icon. And because we share the same dictionary with Word, all of your unique settings and added words will be available to both Flexquest and Word.

Use the powerful Word print engine for letters, if you wish. Flexquest can also utilize the same print engine used by Microsoft Word—to give you speed and better control of Windows. Of course if you don't use Word, you will still have options to use Flexquest's built in Rich Text formatting, or standard text with access to your full range of fonts.

Monitor your organization's growth in members, donors and pledges—in a single glance. Print the new Membership and Donor Statistical Evaluation report to see a 4- year trend comparison in membership, first time donors, and new pledges. Also capture 4- year trends for total donations, pledges and fulfillment, average gifts, and the number of fund raising appeals to which a donor is responding. See a month-by-month snapshot of your current year's donations. Review the amounts for all active, late, and lapsing pledges by schedule. In addition, your top donation amounts are ranked in 5 ways—by city, membership type, highest donors, household income, and by project—all enabling you to most effectively direct your organization's growth.



New Report Capability, continued

Donation reports test for donations not yet deposited. Any reports that rely on deposit dates advise you if you have any donations recorded in the selected date range—but not yet deposited (therefore they would be missing from this report). This helps reduce potential reconciliation problems between Flexquest and your bank statements.

More variables added for donation letters and email. Select 6 new variables—current YTD donations, total value received on those donations, and the total year's tax-deductible portion (donation less value received), and the same three variables for last year's YTD donations. Now you won't have to refresh your donations to a prior year's date just to get your figures for year-end donation letters prepared in the following year.

In-Kind letters uses variables. You will now be able to use all the standard donation variables in the in-kind acknowledgement letters.

Pledge reminder notices can use Rich Text. In the past, pledge reminder notices have used just one font, but now you will have all the rich formatting options available.

CareNet affiliated CPC's have updated statistical report. We have incorporated all 2001 changes in CareNet's annual statistical report so affiliated centers remain totally current in their reporting. (CPC systems)

Print a complete summary of any Legislative Issue. Filter to any single issue or a group of issues and print a complete summary of your abstracts, strategic planning, lobbying schedule, talking points, and other details about the issue. (Prolife systems)

New Functions and Menu Choices

Globally re-assign your fund raising project ID numbers. Sometimes it is helpful to change your fund raising project numbers after the fact. You can now pick the project and then let Flexquest automatically and globally change its Project ID throughout the Donation, Donation Archives, Events, Invitations, Letters, and Resource forms.

Export 3- year donation trends to telemarketing firms or others. Flexquest has provided a report of donors' 3-year giving trends, but now you can export these figures as a data file for your telemarketing company, if you wish.

Update Prospects with telemarketing dispositions. While Flexquest has always let you electronically update your Resource records with telemarketing dispositions, you can now export your Prospect data for telemarketing and then use a new function to update member requests and new phone numbers as returned by your telemarketer. You can also print a list of address changes or member comments as noted by the telemarketing company.

Pick all your codes and fund raising projects from easy to use lists. All codes and project numbers needed to run functions are now chosen from pull-down lists. Now all reports, filters, and functions all use these convenient pull-down lists.



New Form Capability

Editing your custom choices just got easier. You no longer need to open your Classification Codes form to modify your combo-box choices. Now you can add, modify, or delete any code with a single right click on the relevant pull down box from within any form. Flexquest will instantly check if a code is already in use and let you know if it cannot be changed.

Getting Help just got easier. We have added a new form—*Send Us Your Questions*. This is an automated Help Wizard that lets you email or fax your questions directly to us from within Flexquest. As an added convenience, the Wizard helps you formulate your question and sends a report of your hardware and system configuration. And if you are experiencing system problems, we've added an option to instantly send your error logs so we can quickly identify the problem without taking your time to explain the problem to us.

Closing forms just got easier. Some of you have wanted to click on the "X" in the upper right corner on the forms header bar to close forms—and now you can do just that. Flexquest still gives you all the protections of checking for valid data prior to closing, but simply clicking the "X" will seem more intuitive to many Windows users.

Counselors get their own form. We've added a new Counselor form. This form sets up your counselors with addresses, multiple phones, email, and free form note fields for their scheduling preferences or any other notes. Client Intake and Visits will reference the new Counselor form. Reports, filters, and functions have been added for counselors and you will have the ability to send letters and email to your counselors. (CPC systems)

Client Intake OB/GYN page numeric fields can handle 'unknowns'. You can now distinguish client's who have truly had no abortions from those whose past abortion history is unknown. Numeric fields now accept a '?' if you are unsure if a client has or has not had any past abortions. This unknown status is also reflected accurately on all statistical reports. (CPC systems)

You can individually select Pledge and Donation names. We've added 'Select' checkboxes to both the Pledge and the Donation forms. This can be useful if you are preparing letters or email for just a few donors and wish to use the specific donation and pledge variables (donation amount, date, pledge balance due, etc.) of the Letters & Email form.

Email preferences get validated. We've beefed up our email data checks—now in addition to checking if the email address is entered in a valid format, we also make sure that an email address has been entered at all if a user checks 'Prefers Email'.



New Form Capability, continued

Defaults data entry improved when moving a name from Prospect to Resource. Flexquest will look up your default values as set in File Preferences when moving a name from Prospect to Resource and fill in any missing information using these defaults. This helps keep your data as complete as possible.

A couple of forms have moved or been renamed. To make it more accessible, Letters & Email is now on the main menu, rather than nested under Support. Letters & Email is used frequently, so we wanted to make it easier to access. The Options form has been renamed and divided into 2 forms—'Registration' and 'Preferences'.



Technical Enhancements

Flexquest just got smarter. There are many integrity checks going on behind the scenes in Flexquest and to speed these up, Flexquest now "learns" what's expected for your system to maintain itself. For instance, if you write exceptionally long letters, Flexquest verifies the longer memo fields just once and then speeds your system's performance by accepting these long memo fields as typical in the future.

Introducing Flexquest in the Modular series. We have added a very affordable modular version of Flexquest. This can help your chapters, affiliates, or satellites get organized using the powerful Flexquest system in an easier to manage version. By helping your contributory groups manage their mailing lists, donations and letters, you can help strengthen your grassroots prolife and CPC support.

New users will get an automated import of the zip codes, cities and counties in their state. We know new users have a lot on their minds, so we've just taken one more task off their 'to-do' list by providing the city, county and zip code data automatically. And of course, they can still use the Zip code form's import function to add additional zip codes as needed.

Address Service updates bad address holds. If you use Smart Machines' Address Update Service for National Change of Address, we will automatically clear "bad address" holds on any records that were successfully updated by NCOA.

And finally... We've continued improving the reliability and speed of Flexquest—network printing has been revised to make sure 2 users never get in each other's way when printing. We run additional behind the scenes checks of indexes and have automated many of the repairs you previously needed to manually initiate. Also, we've sped up printing and previewing letters formatted in Rich Text. And we've made letter variables more robust—now if a letter variable gets accidentally altered, Flexquest still knows what to do with it.