

Unlocking Powerful New Insights From Your Reports

Legacy Loop

Oliver Asha, Marie Broxholme – Make a Will Online

Your dashboard

TEST CHARITY Online Gifts in Wills Campaign

You became partner on 07/09/2018

Edit Charity

Summary 20/05/2025

Cash pledges

£ 3000

Month to Date

£ 85499

Campaign Total

Residuary gifts (of which conditional)

4 (3)

Month to Date

56 (34)

Campaign Total

Pre-paid wills

6 remaining

4 used

Current service: Pre-paid wills

Budget



0
Wills used this month

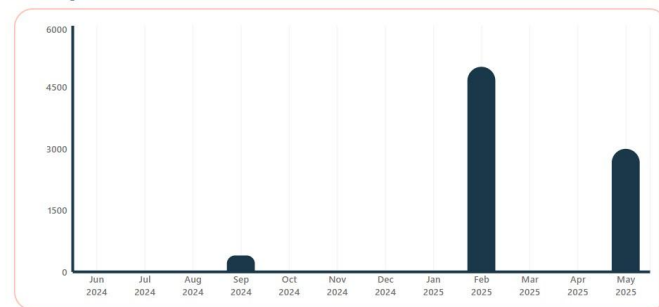
13 wills
Remaining wills for this month

Your current monthly limit is 13 wills. You can change this [here](#). Any changes will take effect immediately.

You are only invoiced for completed wills - you pay no monthly fee for this service.

Pre-paid wills are used first and do not count toward your monthly budget. Once they run out, the Free Wills pay-per-will service will apply, deducting from your monthly budget.

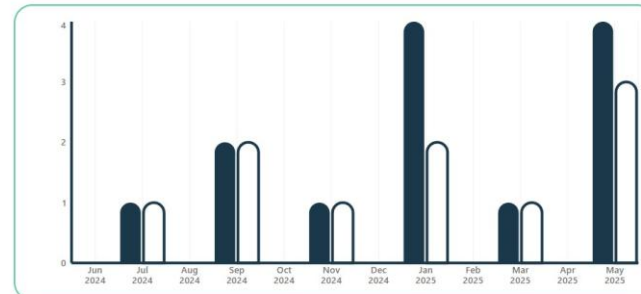
Cash Pledges



Your campaign performance for the last 12 months

Amount Pledges in Cash

Residuaries Gifts



Your campaign performance for the last 12 months

Residuaries Contingent Residuaries

Google Analytics

(Following information from Google Analytics 4. Please understand the limitations of this data before relying on it [here](#))

How Users found the page

Source/medium	Users	New Users
referral	53	0
(direct) / (none)	7	0
google / organic	1	0

Unique Users

61

"Get Started" Clicks

33

Started Wills

Start Date	Completion Date	Name	Born	Email	Address	Cash Pledge (£)	Residuary (%)
01-May-25 10:33	01-May-25 10:38		2007	test@test.co.uk	Chesterfield, S43 2BG	0	10
01-May-25 12:54	n/a	Test Test	1970	marie+testcharityprepaidstarted@makeawillonline.co.uk	Test Road, Test, W1A 1AA	0	n

User data accumulated from the last 30 days

Supporters who start but don't complete their will receive reminder emails on day 10 and day 21, including a link to resume.

Download CSV

Completed Wills

Completed Date	Name	Born	Email	Address	Cash Pledge (£)	Residuary (%)	Contingent?	Contact?
01-May-25 10:38		2007	test@test.co.uk	Chesterfield, S43 2BG	0	10	y	no
01-May-25 12:59	Anonymous	1960	Anonymous	Anonymous	1000	10	y	no
14-May-25 15:36	Test Test	1945	marie+testcharity20@makeawillonline.co.uk	Test, Test, W1A 1AA	0	10	n	yes
14-May-25 15:48	Test Test	1970	marie+testcharity21@makeawillonline.co.uk	Test, Test, W1A 1AA	0	20	y	no
14-May-25 16:13	Test Test	1968	marie+testcharity22@makeawillonline.co.uk	Test, Sheffield, S34 5TH	2000	n	n	yes

User data accumulated from the last 30 days

Download CSV

Download

Monthly reports

View Report

Download CSV



- May 2025
- April 2025
- March 2025
- February 2025
- January 2025

Show All

Tailor your message and plan your future

- Understand supporter demographics
- Year of birth
- Postcode
- % residuary
- Contingent residuary

Completed Wills								
Completed Date	Name	Born	Email	Address	Cash Pledge (£)	Residuary (%)	Contingent?	Contact?

Completed Wills								
Completed Date	Name	Born	Email	Address	Cash Pledge (£)	Residuary (%)	Contingent?	Contact?
01-May-25 10:38		2007	test@test.co.uk	 Chesterfield,	0	10	y	no
01-May-25 12:59	Anonymous	1960	Anonymous	Anonymous	1000	10	y	no
14-May-25 15:36	Test Test	1945	marie+testcharity20@makeawillonline.co.uk	Test, Test, WIA 1AA	0	10	n	yes
14-May-25 15:48	Test Test	1970	marie+testcharity21@makeawillonline.co.uk	Test, Test, WIA 1AA	0	20	y	no
14-May-25 16:13	Test Test	1968	marie+testcharity22@makeawillonline.co.uk	Test, Sheffield, S34 5TH	2000	n	n	yes

User data accumulated from the last 30 days

[Download CSV](#)






See what campaigns are working

- Analytics portal which shows the sources of the supporter clicks
- Know where every supporter starts the process from and how far they get

Google Analytics

(Following information from Google Analytics 4. Please understand the limitations of this data before relying on it [here](#))

Source/medium	Users	New Users
 heretang.org.uk / referral	53	0
 (direct) / (none)	7	0
 google / organic	1	0

Unique Users

61

"Get Started" Clicks

33

Break out session

KPI Discussion

- Do you already use KPIs
- Are they working well?
- What KPI's will this data help you meet?





See your pledgers and intenders

- Know who started making their will and when
- Up to the minute information on wills completed and gift inclusion
- Track intenders – stewardship ability
- Updated GDPR message and Terms and Conditions – great power/great responsibility

Start Date	Completion Date	Name	Born	Email	Address	Cash Pledge (£)	Residuary (%)	Contingent?	Contact?
01/05/2025 10:33	01/05/2025 10:38	Test Test	2007	test@test.co.uk	Test Street, Manchester, S45 2BU	0	10	y	yes
01/05/2025 12:54	n/a	Test Test	1970	marie+test23@makeawillonline.co.uk	Test Road, Test, W1A 1AA	0	n	n/a	no
01/05/2025 12:58	01/05/2025 12:59	Anonymous	1960	Anonymous	Anonymous	1000	5	y	no
01/05/2025 15:08	n/a	Test Test	n/a	serv@ghfhtryt.com	Test, Test, London, WC2N 5BY	0	10	n/a	no
03/05/2025 07:37	n/a	Test Test	n/a	test50@test.com	Test, Test, York, S87 3RF	500	0	n/a	yes
07/05/2025 11:13	n/a	Test Test Test	1960	marie+test18@makeawillonline.co.uk	Test, Test, W1A 1AA	0	n	n/a	no
13/05/2025 17:09	n/a	Test Test	1980	marie+test19@makeawillonline.co.uk	Test, Test, W1A 1AA	0	10	n/a	no
14/05/2025 15:35	14/05/2025 15:36	Test Test	1945	marie+test20@makeawillonline.co.uk	Test, Test, W1A 1AA	0	10	n	yes
14/05/2025 15:46	14/05/2025 15:48	Test Test	1970	marie+test21@makeawillonline.co.uk	Test, Test, W1A 1AA	0	20	y	no
14/05/2025 16:12	14/05/2025 16:13	Test Test	1968	marie+test22@makeawillonline.co.uk	Test, Sheffield, S34 5TH	2000	n	n	yes

Seamless journey for your supporter from your message through to making their will

- Improve your landing page experience
- Customise your welcome messages



[FAQs](#) [Resources](#) [Sample Will](#) [About](#)

[Make Your Will](#)

[Login](#)

Make a will and make a lasting difference
TEST CHARITY

Join the many thousands of people who remember a charity in their will each year. This is your opportunity to leave a legacy to an organisation that is doing good in the world. Using this free online will writing service, you can remember people who have made a difference in your life, by making a difference in theirs.

[Get Started](#)

editable

YOUR
LOGO
HERE

Name and URL

Charity Contact

Invoice Contact

Billing Options

Spending Limit

Logo

Charity Specific Text

Welcome Page Heading Text (max 80 characters)

The headline on your page. Your key message to donors.

Click [here](#) to see a sample of your partner page with your current changes.

Make a will and make a lasting difference

Welcome Page Text

Your welcome message to engage your supporters

Click [here](#) to see a sample of your partner page with your current changes.

Join the many thousands of people who remember a charity in their will each year. This is your opportunity to leave a legacy to an organisation that is doing good in the world. Using this free online will writing service, you can remember people who have made a difference in your life, by making a difference in theirs.



Drive higher conversions

- Add text into our reminder emails
- Customise your thank you message

Name and URL

Charity Contact

Invoice Contact

Billing Options

Spending Limit

Logo

Charity Specific Text

Reminder Email Text

Supporters who start but don't complete their will receive reminder emails on day 10 and day 21, including a link to resume. You can add a custom paragraph to this email - enter only the text you wish to include in the box below.

Click [here](#) to see a sample 10 day email and [here](#) to see a sample 21 day email.

Charity Partner text is inserted here

Thank you/Confirmation Page Text

Your thank you message to your supporters and confirmation message

Click [here](#) to see a sample of your partner confirmation page with your current changes.

Thank you for making your will and for considering your chosen charity. Your will documents have been emailed to you, along with important instructions on signing, witnessing, and storing them securely. A solicitor will now review your will, and if there are any potential issues, they will contact you. You can expect to receive feedback within two working days.

By leaving a gift in your will, you are making a lasting difference and joining a community of dedicated supporters who help ensure this charity's important work continues for years to come.

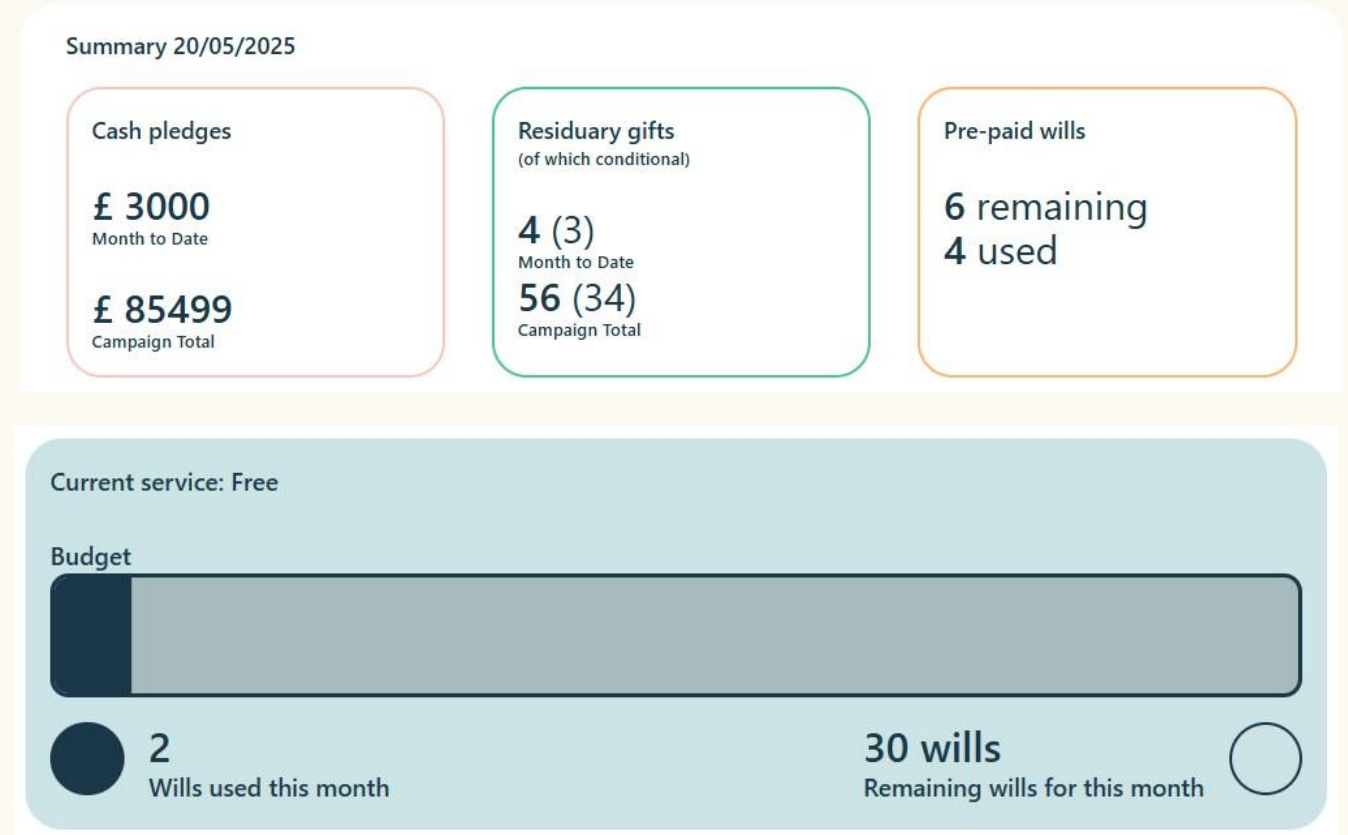
Break out session

- How can you utilize the data provided to improve your campaigns?



More ways to make the most of your investment in your campaign

- Pre-Paid will tracker
- Pay as you go – with easy use cap



Improved Security

- Two Factor Authentication
- One login
- Shared inbox

Email

marie@makeawillonline.co.uk

Password

.....

Two Factor Authentication Code

Submit MFA

[Forgot your password?](#)

Any Questions?

