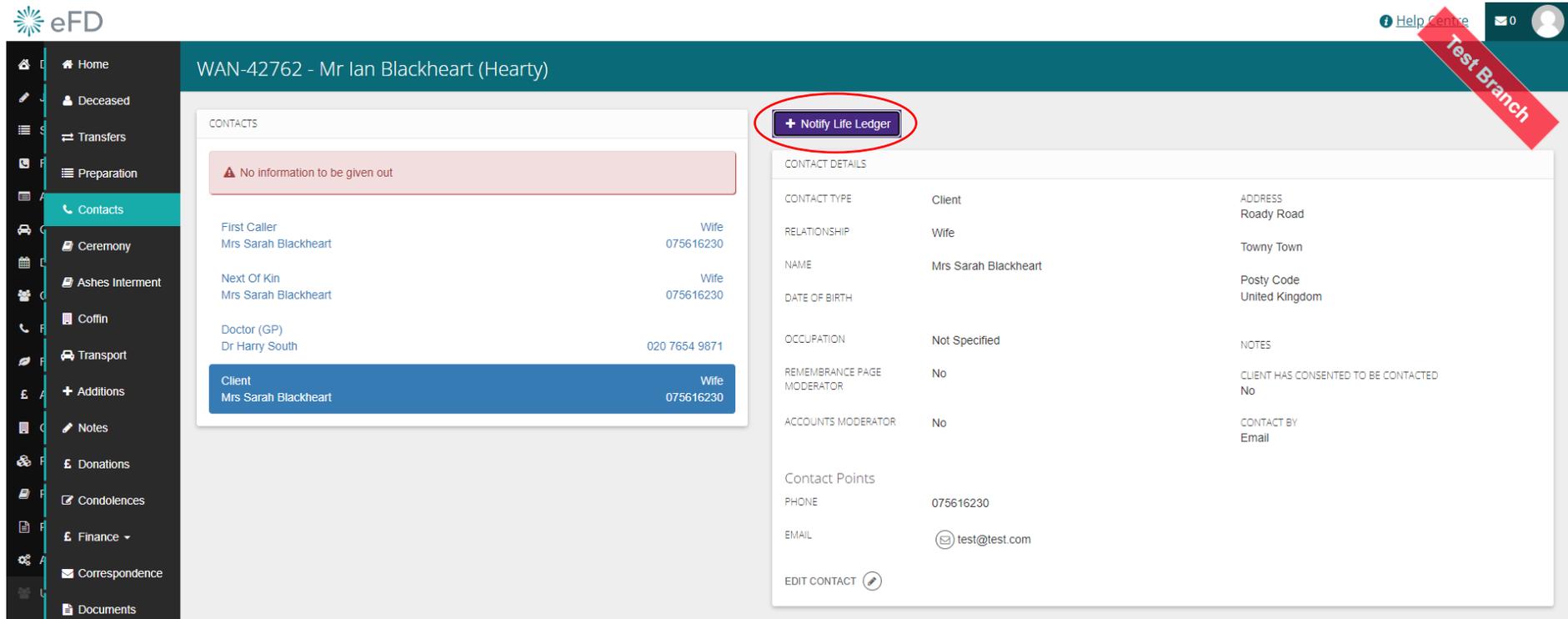


Life Ledger Integration



The screenshot shows the eFD software interface for a case titled 'WAN-42762 - Mr Ian Blackheart (Hearty)'. The interface includes a sidebar menu on the left with options like Home, Deceased, Transfers, Preparation, Contacts, Ceremony, Ashes Interment, Coffin, Transport, Additions, Notes, Donations, Condolences, Finance, Correspondence, and Documents. The main content area is divided into two sections: 'CONTACTS' and 'CONTACT DETAILS'. The 'CONTACTS' section shows a list of contacts, with the 'Client' contact (Mrs Sarah Blackheart) highlighted in blue. A red circle highlights the '+ Notify Life Ledger' button in the top right corner of the 'CONTACTS' section. The 'CONTACT DETAILS' section shows information for the selected contact, including contact type, relationship, name, date of birth, occupation, remembrance page moderator, accounts moderator, contact points, phone, email, and a note that the client has consented to be contacted.

CONTACTS

No information to be given out

First Caller	Wife
Mrs Sarah Blackheart	075616230
Next Of Kin	Wife
Mrs Sarah Blackheart	075616230
Doctor (GP)	020 7654 9871
Client	Wife
Mrs Sarah Blackheart	075616230

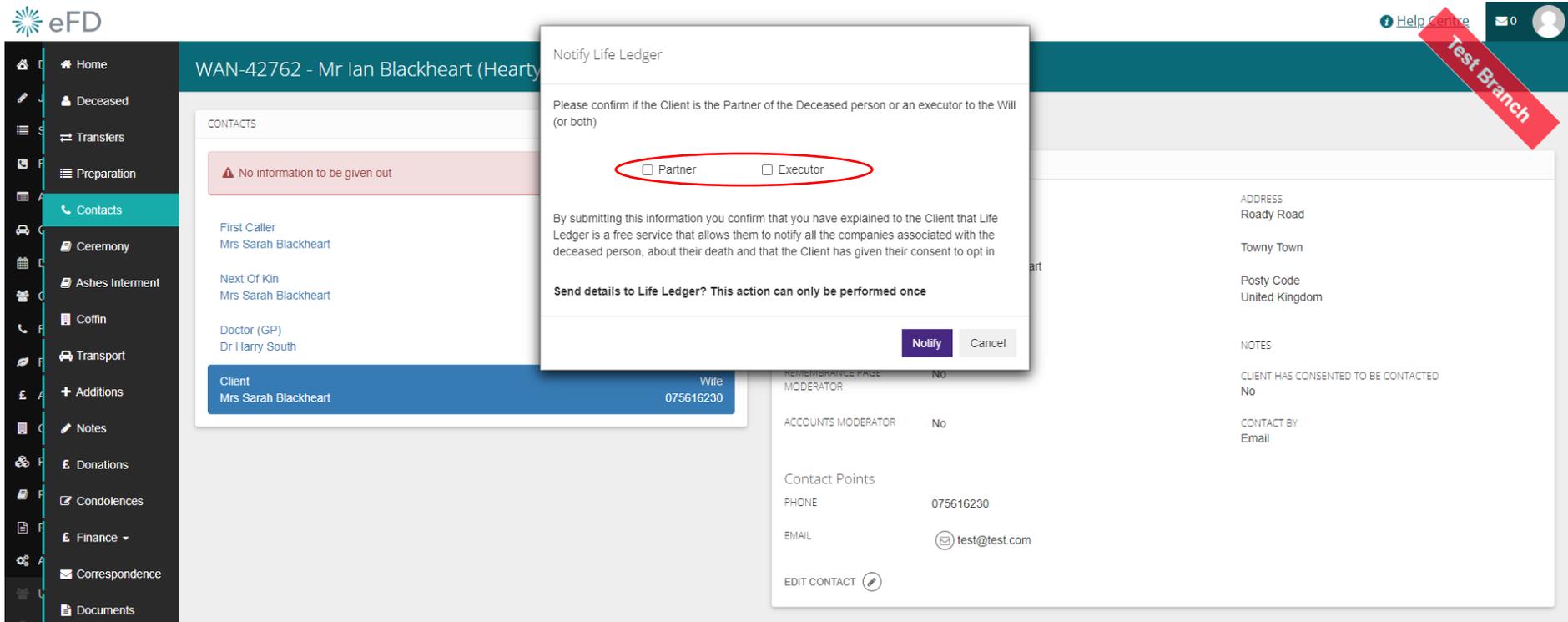
+ Notify Life Ledger

CONTACT DETAILS

CONTACT TYPE	Client	ADDRESS	Roady Road
RELATIONSHIP	Wife	Towny Town	
NAME	Mrs Sarah Blackheart	Posty Code	United Kingdom
DATE OF BIRTH		NOTES	
OCCUPATION	Not Specified	CLIENT HAS CONSENTED TO BE CONTACTED	No
REMEMBRANCE PAGE MODERATOR	No	CONTACT BY	Email
ACCOUNTS MODERATOR	No		
Contact Points			
PHONE	075616230		
EMAIL	test@test.com		
EDIT CONTACT			

1. Select 'Notify Life Ledger' button

Note: this is only available via the Client contact, once submitted it cannot be done again or undone



Notify Life Ledger

Please confirm if the Client is the Partner of the Deceased person or an executor to the Will (or both)

Partner Executor

By submitting this information you confirm that you have explained to the Client that Life Ledger is a free service that allows them to notify all the companies associated with the deceased person, about their death and that the Client has given their consent to opt in

Send details to Life Ledger? This action can only be performed once

Notify Cancel

CONTACTS

No information to be given out

First Caller
Mrs Sarah Blackheart

Next Of Kin
Mrs Sarah Blackheart

Doctor (GP)
Dr Harry South

Client
Mrs Sarah Blackheart

Wife
075616230

ADDRESS
Roady Road
Towny Town
Posty Code
United Kingdom

NOTES
CLIENT HAS CONSENTED TO BE CONTACTED
No

CONTACT BY
Email

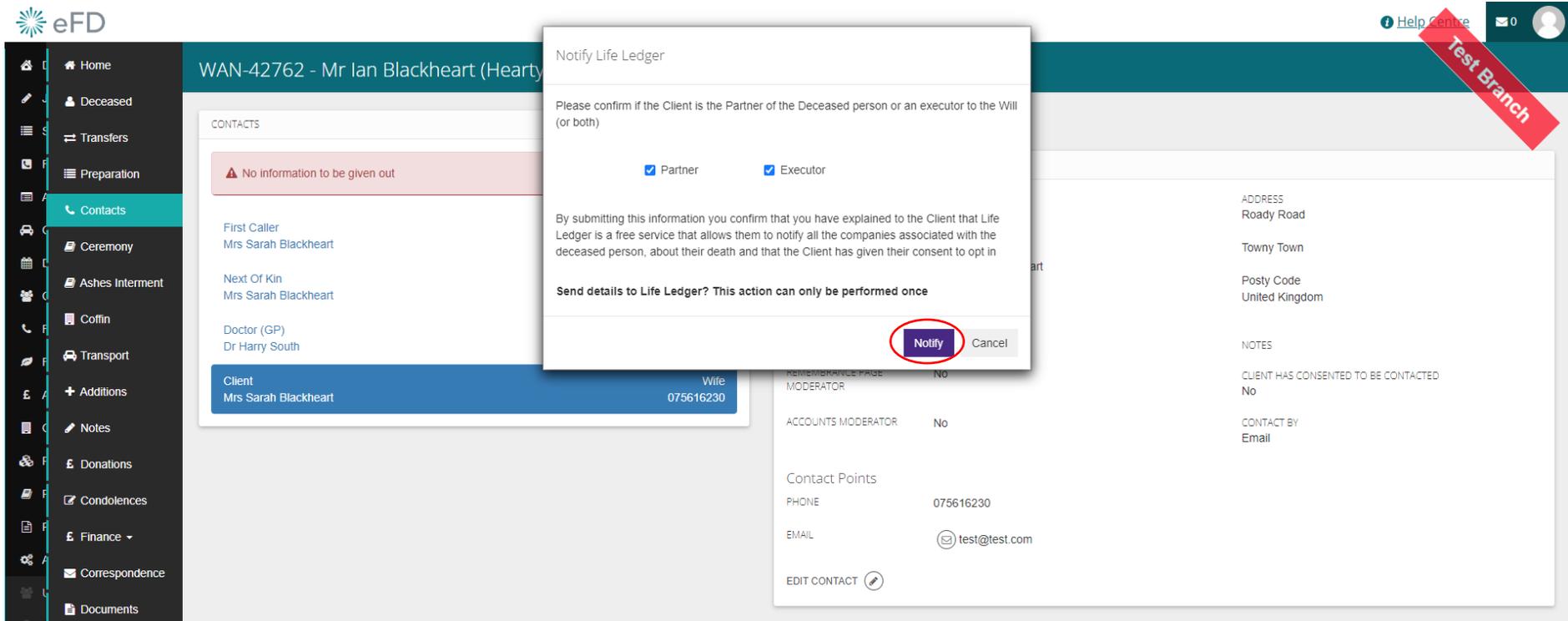
REMEMBRANCE PAGE
MODERATOR No

ACCOUNTS MODERATOR No

Contact Points
PHONE 075616230
EMAIL test@test.com

EDIT CONTACT

2. Select if the Client is the 'Partner' and/or 'Executor'



Notify Life Ledger

Please confirm if the Client is the Partner of the Deceased person or an executor to the Will (or both)

Partner Executor

By submitting this information you confirm that you have explained to the Client that Life Ledger is a free service that allows them to notify all the companies associated with the deceased person, about their death and that the Client has given their consent to opt in

Send details to Life Ledger? This action can only be performed once

Notify Cancel

CONTACTS

No information to be given out

First Caller
Mrs Sarah Blackheart

Next Of Kin
Mrs Sarah Blackheart

Doctor (GP)
Dr Harry South

Client
Mrs Sarah Blackheart

Wife
075616230

REMEMBRANCE PAGE MODERATOR No

ACCOUNTS MODERATOR No

Contact Points

PHONE 075616230

EMAIL  test@test.com

EDIT CONTACT 

ADDRESS
Roady Road
Towny Town
Posty Code
United Kingdom

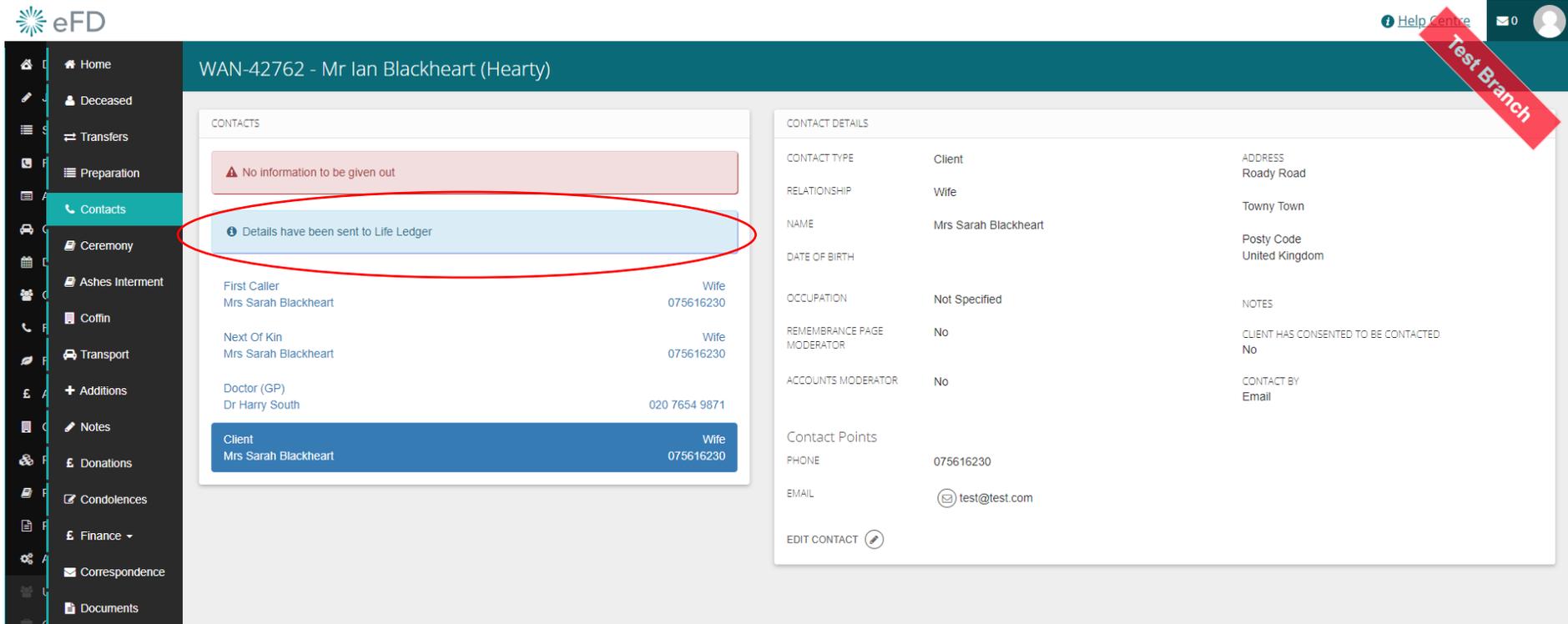
NOTES
CLIENT HAS CONSENTED TO BE CONTACTED
No

CONTACT BY
Email

Help Centre 0 

Test Branch

3. Select 'Notify'



WAN-42762 - Mr Ian Blackheart (Hearty)

CONTACTS

No information to be given out

Details have been sent to Life Ledger

First Caller	Wife	
Mrs Sarah Blackheart	075616230	
Next Of Kin	Wife	
Mrs Sarah Blackheart	075616230	
Doctor (GP)		020 7654 9871
Client	Wife	
Mrs Sarah Blackheart	075616230	

CONTACT DETAILS

CONTACT TYPE	Client	ADDRESS	Roady Road
RELATIONSHIP	Wife		Towny Town
NAME	Mrs Sarah Blackheart	Posty Code	United Kingdom
DATE OF BIRTH		NOTES	
OCCUPATION	Not Specified	CLIENT HAS CONSENTED TO BE CONTACTED	No
REMEMBRANCE PAGE MODERATOR	No	CONTACT BY	Email
ACCOUNTS MODERATOR	No		
Contact Points			
PHONE	075616230		
EMAIL	test@test.com		
EDIT CONTACT			

4. Once done message to confirm 'Details have been sent to Life Ledger' is permanently displayed

Note: Life Ledger will automatically send an email to the Client prompting the Client to login and provider more information