

FirstClass offers you seamless integration with your charity's CRM system. With two integration levels available, FirstClass can provide a linked solution to match your charity's requirements.

CRM Integration Standard

CRM Integration Standard provides you with a quick and easy way to associate your FirstClass records to the appropriate matching record on your CRM.

When a person record is created within FirstClass, you have the opportunity to search through your CRM database to find a matching CRM person record (aka Constituent, Contact, etc). If a match is found, the FirstClass person record is automatically updated with your CRM Reference number plus a number of other details if required. If a matching record on your CRM cannot be found then a new person record can be created on your CRM using the data entered into FirstClass*1.

FirstClass legator income records can also be linked to an income record (aka Gift, Payment, etc) on your CRM database using the same technique. If a matching record cannot be found on your CRM then a new income record can be created using the data entered in FirstClass*1.

Once linked, the person and income records can also be opened on your CRM package from within FirstClass*2.

The New Notification Wizard, built into FirstClass, makes use of these features and allows the integration to be carried out automatically as part of the new notification process.

Sample Costs

One off setup cost for 1 user license	£2,161
12 month annual license*	£574

CRM Integration Advanced

CRM Integration Advanced extends your CRM Integration Standard capability with batch routines to bulk match, verify and update records across FirstClass and your CRM.

The following routines are currently available and additional routines can be built to meet your requirements. These routines work by updating your FirstClass data based on data within your CRM or vice versa.

Lookup Synchronisation

Routines to synchronise Titles, Counties and Countries.

Deceased Status Verification

Routines to check the deceased status for linked records in FirstClass and the CRM.

Person Matching

Routines to match people stored on FirstClass to records on your CRM.

Person Mismatches Report

Compares selected data on your CRM with linked person records in FirstClass.

Person Address Synchronisation (CRM to FirstClass)

Updates the preferred address stored on FirstClass. Also updates selected "never contact" markers.

Fast, reliable integration with your CRM system

Clear FirstClass

Alias Synchronisation

Removes the "alias" stored on your CRM that identifies a record as linked to FirstClass*1.

Adds an "alias" to your CRM for each person stored in FirstClass that has a CRM Reference*1.

Updates your CRM Reference stored on FirstClass using the "alias" stored on your CRM that identifies a record as linked to FirstClass.

Legacy Income Synchronisation (FirstClass to CRM)

Updates your CRM with details of legacy income stored in FirstClass*1.

Legator Synchronisation (FirstClass to CRM)

Provides options to synchronise various attributes stored on the CRM person record that summarise information stored on FirstClass regarding a legator*1.

Legator Constituency Code Synchronisation

Adds or updates a "Legacy Notified" constituency code on your CRM for each legator stored on FirstClass that has a CRM Reference*1.

Sample Costs

Each routine can be purchased separately. The following prices show the cost for purchasing a single routine.

One off setup cost	£1,288
12 month annual license*	£820

* The Annual License will be due on each anniversary of the installation. The licence cost is reviewed annually. The Annual license covers all phone support and upgrades.

*1 Subject to your CRM, if your CRM does not support this functionality alternative "exports" can be built to provide similar functionality.

*2 Subject to your CRM, if your CRM does not support this functionality FirstClass will display a "read only" window showing data from your CRM.

At Clear we specialise in the design, production & installation of reliable, cost effective, Microsoft based software.

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