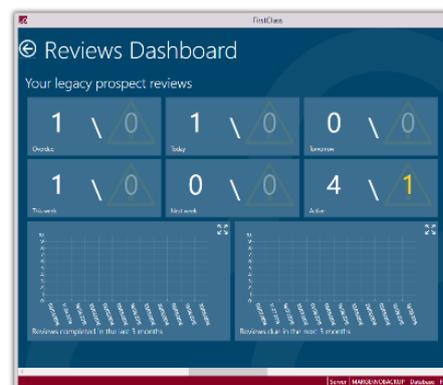
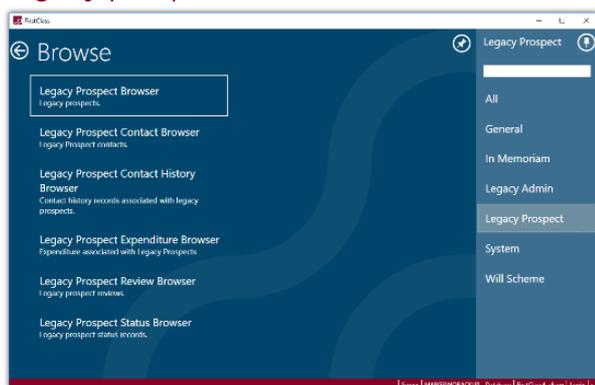


FirstClass Essentials

Modules Available

FirstClass Essentials users can also choose to purchase the following modules to add additional functionality to FirstClass.

Legacy prospect



The Legacy Prospect module is used by charities to record the complete Legacy Prospect journey, from a person's first enquiry through to their final legacy. Functionality for creating letters and emailing from FirstClass makes it straightforward to develop and maintain a relationship with each legacy prospect.

Information about each Legacy Prospect is maintained through the Legacy Prospect window. This includes personal information about the legacy prospect, a history of the status of the legacy prospect, any related expenditure, contacts, a full contact history and any related reviews.

The status tab enables you to maintain a history of the legacy prospect status records; hence a person can pledge, enquire etc more than once. This enables the 'Pledger Journey' to be recorded and easily viewed.

The expenditure tab allows you to record expenditure related to the legacy prospect. This is mainly used by charities using the Legacy Prospect module to record statutory wills, but it can be used to record any type of expenditure related to a legacy prospect.

The Contact History tab enables all contact history records associated with the legacy prospect record to be listed and accessed. This gives access to letters sent and any other communications recorded.

Reviews can be stored against each legacy prospect record and viewed through the built-in review browser or the legacy prospect section of the reviews dashboard.

The legacy prospect browser can be used to quickly locate details about a particular legacy prospect. This browser also provides ways to report on the legacy prospect data and export data where required.

Information about each Will is maintained through the Will window. This includes information about the Person (or Persons) making the Will, details about the Solicitor writing the Will (including their invoice) and details about how the person heard about the scheme. Wills are either Single or Mirror and can be classed as first, updated or codicil.

The Contact History tab enables all contact history records associated with the Will (or either of the participants) to be listed and accessed. This gives access to letters sent and any other communications recorded.

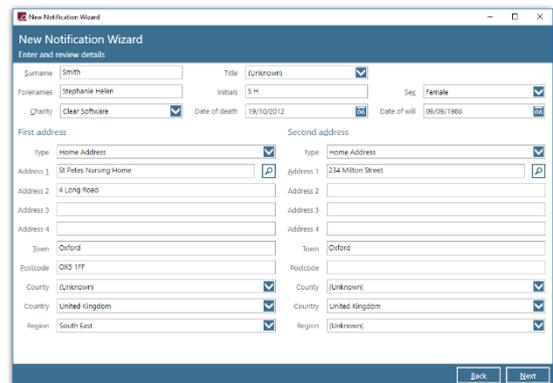
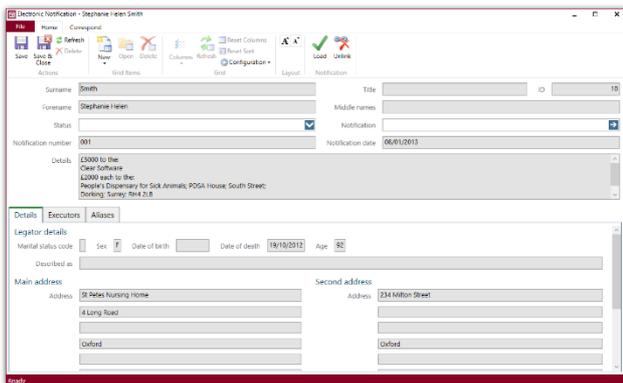
The Will browser can be used to quickly locate details about a particular Will. This browser also provides ways to report on the Will data and export data where required. Statistics such as invoice costs, current will status, promotion and ROI are available on this browser.

Many charities organise their Will Writing Service through a number of Schemes. Scheme records can be easily located and maintained using the Scheme Browser. The Scheme window provides a large number of statistics about each scheme. Wills are also associated with Campaigns and Promotions.

Each firm of solicitor's involvement with a particular Scheme is recorded using the Scheme Membership window.

Additional reporting functionality is available at the Campaign, Promotion, Scheme and Scheme Membership level so that, for instance, the number of Wills made, their total cost to the charity, the total value pledged and the actual legacy income received are available at all levels.

Smee & Ford

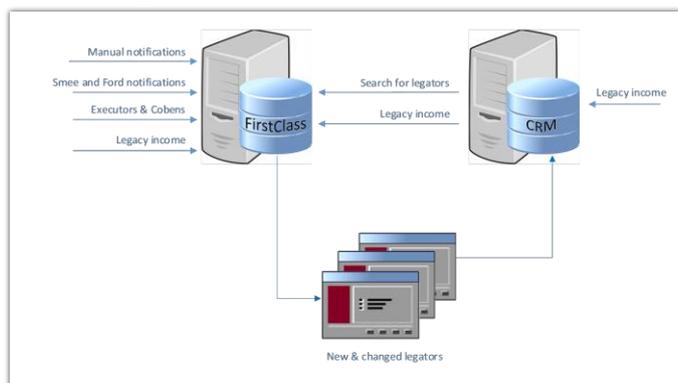


If you subscribe to the Smee & Ford legacy notification service, then you will receive electronic files from Smee & Ford containing notifications of legacies mentioning your charity.

The built in Electronic Notification wizard in FirstClass steps you through the whole process of loading these Smee & Ford notifications in a sensible and logical way. Built-in validation routines help to check the validity of the data as well as helping to prevent duplicate notifications being entered.

The wizard guides you through the process of entering legacy information including legator, probate, legacy, co-beneficiaries and executor details along with built-in prompts to add estimates and reviews while displaying the relevant information from the Smee and Ford data throughout the process.

CRM integration



FirstClass can be configured to link to cloud based CRM databases including Microsoft Dynamics and Salesforce.

These links mean that when adding new records into FirstClass, users can search their external CRM database from within FirstClass to see if a person was already known to their charity. If so, a new record can be created in FirstClass by copying relevant data from the external database. This is also applicable for income records. Accessing any linked CRM record is then quick and easy from within FirstClass.

The standard integration can also be extended with advanced batch routines to bulk verify and update records across FirstClass and your CRM.

A separate document is available for more information regarding CRM integration.

Contact Us

At Clear we specialise in the design, production & installation of reliable, cost effective, Microsoft based software. Whatever your needs, you'll find our experienced team has the expertise to develop an innovative bespoke solution and provide high quality technical support after installation. Don't hesitate to contact us.

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