



# FirstClass Essentials

Fully configurable, giving you total control

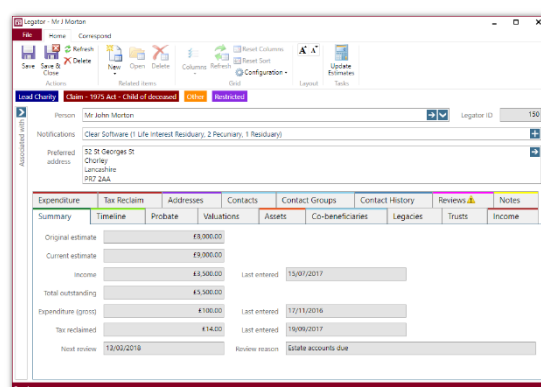
## FirstClass

FirstClass is the UK's leading legacy management software. Originally designed by a group of six charities over 20 years ago, FirstClass has been continually developed and improved, and along with FirstClass Web, there are nearly 100 not-for-profit organisations using it today.

FirstClass manages the intricacies of the legacy process and has been developed using the latest Microsoft technologies to be a professional, affordable and cost-effective tool for not-for-profit organisations seeking to maximise their income stream from legacies.

We know that no matter the size, every not-for-profit organisation needs effective legacy management. That is why, using our many years of experience developing legacy management software, we have created a suite of applications to provide a solution for organisations of all sizes. With a range of powerful features, organisations can choose from FirstClass In-house, FirstClass Cloud, FirstClass Essentials and FirstClass Web.

## FirstClass Essentials



FirstClass Essentials is ideal for those charities with a smaller number of legacies who still require effective legacy management software packed with key features.

As with all other versions of FirstClass, FirstClass Essentials manages the intricacies of the legacy process and has been designed to be a professional, affordable and cost-effective tool for charities seeking to maximise their income stream from legacies. The Essentials version of FirstClass offers fewer advanced features than the In-house or Cloud versions and is accessed online via any suitable PC. Clear install FirstClass and all the related software on Clear's own secure online Microsoft Azure platform and manage the upkeep of the servers, including backups, with little or no IT support required from your IT team. The Essentials version is restricted to a maximum of 3 concurrent users from your charity.

The following features are not available in the Essentials version of FirstClass compared to FirstClass In-house and FirstClass Cloud:

- Assets
- Estate Accounts
- IHT Calculator
- Accruals
- Emailing

## Key Features

### Rapid access to data

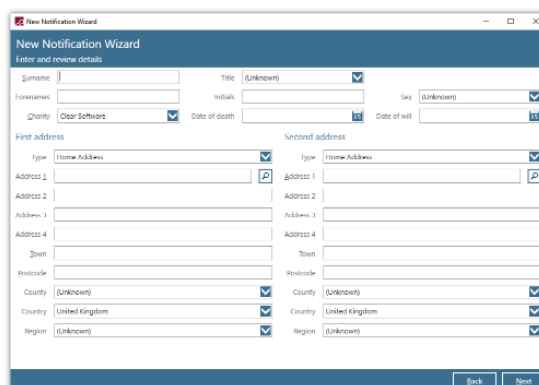
FirstClass is used to keep track of all charitable legacies due and received, providing instant access to pipeline information whenever it's needed.

### Legacies

Multiple legacy elements can be associated with each legator. Each charity can configure their own legacy types to match the way they currently work.

### Notification wizard

The Notification Wizard provides a simple step by step process to take you carefully through the full process of recording a new notification. The wizard has built in processes to help prevent duplicate records from being entered. It also works with Smee and Ford electronic data and can link into your charity's CRM (only available for cloud-based CRMs).



### Comprehensive contact history

A complete contact history is maintained for each legacy, which can be updated each time a new communication is sent or received.

### Income, expenditure and estimates

FirstClass offers you the ability to record both income and expenditure against each legacy. A history of estimated values can be entered for each legacy along with associated expected income records.

### Unlimited customisable standard letters

FirstClass has the ability to use standard letter templates, which can be tailored to suit any circumstances to ensure that communications are 'in brand' and have the correct tone. Digital signatures can be stored in FirstClass and used within the templates.

### Contacts

Multiple contacts can be recorded, including both lay and professional along with any relationship with the legator.

### Person details

Each person can be saved with multiple addresses along with aliases to record other names that the person may also be known as.

## Income dashboard

The Dashboard provides a quick and easy picture of your recent legacy performance. It shows a breakdown of your income, targets and notifications as Month to Date (MTD) and Year to Date (YTD) and the total balance outstanding. A chart shows your income received in the last 12 months against targets that have been set.

## Probate information

Important dates such as Last Will Date, Codicil Date, Probate Date, Date Notified can be stored.

## Reviews

Multiple reviews can be stored against each legacy to act as reminders to carry out future checks and tasks and assigned to individual handlers. A reviews dashboard is provided to show the position of all open reviews, for individuals or all handlers. You also can mark reviews as critical.

## Reports

FirstClass offers an extensive set of built-in financial and managerial reports.

## Browsers

FirstClass includes up to 30 built in browsers allowing users to interrogate data easily and efficiently. Browsers can be customised for each charity.

## Wizards

A number of easy to follow wizards are included for specific processes. These include adding new manual notifications, creating letters and adding electronic notifications.

## Timeline

A tabular timeline view is available which shows the progress of the administration of each legacy including key milestones in the past, such as probate date, and important dates in the future, such as forthcoming reviews and expected income.

## Tax reclaim

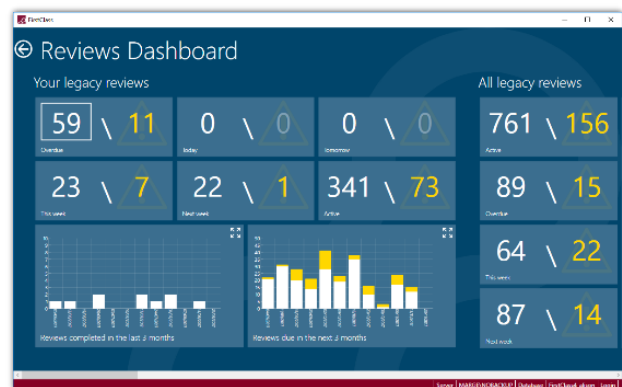
A built-in report is provided to produce the data required for HMRC.

## PAF

FirstClass Essentials supports managed address checking which is managed and configured by Clear. Additional costs will apply.

## Info headers

Info Headers are displayed to quickly draw your attention to important information such as issues, overdue income, outstanding reviews and restrictions.



The screenshot shows a detailed view of a legacy notification record. The record is for 'Mr John Martin (Clear Software)' with handler 'Gordon Cooke (G)'. The status is 'Open', dated opened '18/10/2016'. The type is 'Review' with a share of '1' out of '1' (33.333%). The notification is for 'Clear Software notification'. Below the record is a 'Timeline' table showing various events:

Date	Age	Description	Details	User
18/10/2016	3y 3m	Last will date		
18/10/2016	3y 3m	State of death		
18/10/2016	3y 3m	Clear Software notification	Handler Mr Gordon Cooke	Administrator
18/10/2016	3y 3m	Executor list entry	Clear Software notification	
18/10/2016	3y 3m	Assets & liabilities valuation received	Trust Estate (value: 11181)	Administration
18/10/2016	3y 3m	Residuary legacy opened	33.333% - General - General Funds	Administrator
18/10/2016	3y 3m	Residuary legacy opened	Restricted - Boston Branch	Administrator
18/10/2016	3y 3m	Residuary income (£1,500.00 (Current))	Spew and Food - Restricted - Boston Branch	Administrator
18/10/2016	3y 3m	Residuary legacy opened	Restricted - Charley Branch	Administrator

## Shortcuts

FirstClass has been designed to provide shortcuts to access certain functionality and data quickly. These shortcuts include Quick Open, Recently Used and adding favourite browsers and reports to the home screen.

## Additional modules

Several modules are available to purchase to work within the FirstClass system including Legacy Prospects, In Memoriam, Will Scheme, CRM Integration (only available for cloud-based CRMs) and Smee and Ford Imports.

## Additional features and services

Clear can also provide several tools and services to work alongside FirstClass including Data Imports, Data Exports, Data Migration and easy Legacy Monitor data generation. Additional costs may apply.

# Modules

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 from FirstClass makes it straightforward to develop and maintain a relationship with each legacy prospect.

## In memoriam

The In-Memoriam module is used to manage In Memoriam donations and where appropriate to maintain relationships with relatives of the deceased as well as organisations such as funeral directors.

## Will Scheme

Any charity using this module will be able to record details about all the people who use their will writing service. Extensive reporting is provided so that the effectiveness of this service can be carefully monitored.

## 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 the CRM record is quick and easy from within FirstClass.

## Smee & Ford imports

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.

Separate documents are available on CRM integration and the modules available.

## Tools and Services

Clear can also provide the following tools and services to add to the existing functionality of FirstClass Essentials.

### Data import

Routines can be built to import data from a range of data sources directly into FirstClass.

### Data export

Data can be easily exported from all FirstClass reports and browsers. Additionally, the Clear development team are highly experienced in developing automatic routines that, for instance, export data on new and changed notifications and legacy income. Data exported from FirstClass can usually then be loaded into a number of different systems including Care, Raiser's Edge, Agresso, Sage and Microsoft Dynamics.

### Data migration

Clear are experts at migrating data from a range of different systems and data formats for charities moving to FirstClass. We have migrated data from Visual Alms, Charisma, Care and Raiser's Edge as well as many different in-house systems including those based on DataEase, Microsoft Access, Excel, MS SQL and Oracle.

### Legacy monitor

Clear have developed several reports which allow FirstClass charities who are members of Legacy Monitor to quickly and easily provide their quarterly and market audit data for the programme.

See [www.legacyforesight.co.uk](http://www.legacyforesight.co.uk) for more information regarding the Legacy Monitor programme.

## Benefits

### Increased accessibility

As the program is stored on our secure online Microsoft Azure platform, it can be accessed online via any suitable PC, especially useful for those who work from home or travel out of office frequently.

### Legacy administration

- FirstClass is quick and easy to use – legacy officers find FirstClass intuitive and a real benefit.
- User customisable standard letters in FirstClass will ensure that communications are 'in brand' and have the correct tone.
- In many cases, using FirstClass will expedite the time taken to close a legacy.
- FirstClass can simplify workload management.
- FirstClass is very user friendly. New legacy administration staff will quickly learn how to use FirstClass (if they've not already used it before at another charity).
- External legacy consultants all tend to know how to use FirstClass.

## Management reporting

- FirstClass will improve the speed and accuracy of reporting and forecasting.
- The in-depth detail of data that can be stored in FirstClass makes more advanced analysis of legacy data possible.
- Using FirstClass reports it is simple to provide key information such as legacy pipeline, mean legacy values, notifications between 2 dates, income between 2 dates and cash flow forecast.

## Added value

- Skilled legacy administrators 'add value' to their legacy income by completing their job to a high standard. FirstClass can often help administrators to increase their efficiency and improve the quality of work undertaken, simultaneously increasing this value.
- A number of charities have attempted to quantify the value added by trained legacy officers using effective legacy systems, generating a figure between 5% and 8% - i.e. extra to the money they would have received by just 'thanking and banking'.

The table below shows you how much you can increase the value of your legacy income, just by simply adding 1% or a slightly larger 5% onto your yearly legacy income of £500k.

Increase on Legacy Income of £500K by 1%

**Increase of £5k per year**

Increase on Legacy Income of £500K by 5%

**Increase of £25k per year**

## Other Versions

There are other versions of FirstClass available:

- FirstClass In-house
- FirstClass Cloud
- FirstClass Web

More information can be found on our website.

## 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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