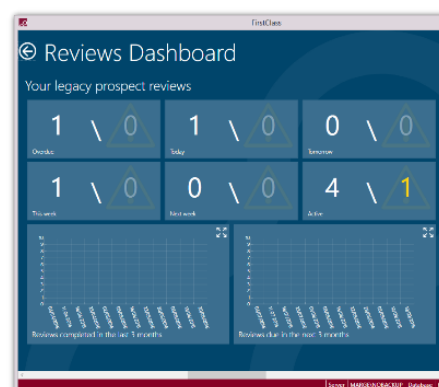
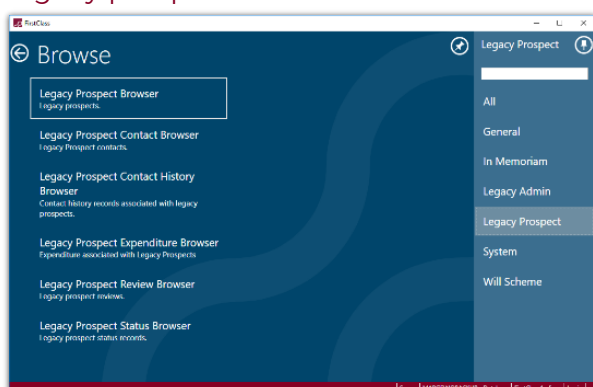


FirstClass In-house

Modules Available

FirstClass In-house 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.

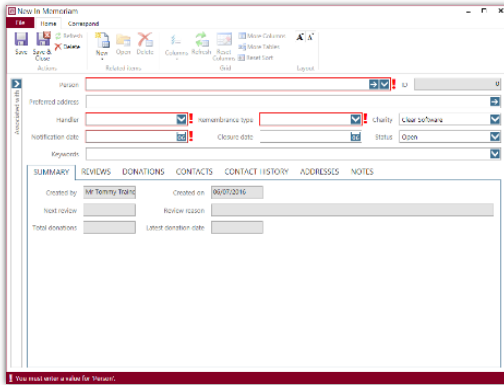
The expenditure tab allows you to record expenditure related to the legacy prospect. This is mainly used by charities using the Legacy Prospect module to record statutory wills but it can be used to record any type of expenditure related to a legacy prospect.

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, scanned documents and any email communications.

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.

In Memoriam



| In Memoriam ID | CRM Reference | Title | Surname | Initials | Postnames | Marital Status | Date of Death | Date Notified | Date Closed | Status | Remembrance Type | Total Donations | Handier | Legator | Address | Town |
|----------------|---------------|-------|-----------|----------|---------------|----------------|---------------|---------------|-------------|--------|------------------|-----------------|---------|----------------------|------------|------|
| 5 | | Mrs | Alexander | B | Ellen | (In Memoriam) | 18/04/2018 | 01/10/2016 | | Open | In Memoriam | A | ✓ | 13 Market Street | London | |
| 6 | | Mr | Andrew | W J | William James | (In Memoriam) | 12/09/2019 | 01/06/2019 | | Open | In Memoriam | TT | ✓ | 59 High Street | Manchester | |
| 2 | | Mr | Morton | J | John | (In Memoriam) | 12/09/2018 | 01/01/2015 | | Open | In Memoriam | A | ✓ | 52 St Georges St | Chorley | |
| 3 | | Mrs | Morton | J | Jane | (In Memoriam) | 12/06/2019 | 22/01/2015 | | Open | In Memoriam | A | ✓ | 32 St Georges St | Chorley | |
| 7 | | Miss | Cookson | D | Deborah | (In Memoriam) | 28/04/2018 | 02/10/2019 | | Open | In Memoriam | SC | ✓ | 8 St Georges Street | Manchester | |
| 8 | | Mrs | Robertson | A | Ann | (In Memoriam) | 24/05/2016 | 01/01/2020 | | Open | In Memoriam | A | ✓ | 32 St Georges Street | Manchester | |

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.

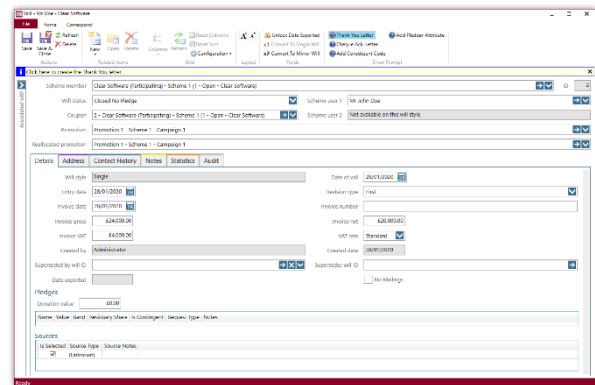
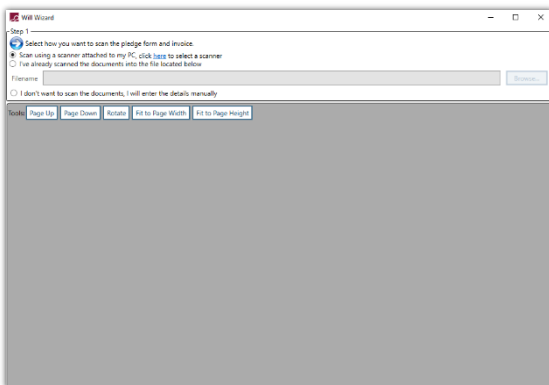
The module can also be used to record donations that are made in honour of someone.

Information about each In-memoriam is maintained through the In-memoriam window. This includes information about the person who is being remembered, the remembrance type, the status of the in-memoriam record, any reviews associated with it and any donations received.

The Contact History tab enables all contact history records associated with the in-memoriam record to be listed and accessed. This gives access to letters sent, scanned documents and any email communications.

The In-memoriam browser can be used to quickly locate details about a particular in-memoriam record. This browser also provides ways to report on the in-memoriam data and export data where required.

Will Scheme



The FirstClass Will Scheme module enables a charity to record details about all of the Wills made by people using their Will Writing Service.

Extensive reporting is provided so that the effectiveness of the service can be carefully monitored.

The 'New Will Wizard' window allows details about each new Will to be quickly entered into FirstClass. Associated invoice and pledge forms can also be scanned as part of the process.

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, scanned documents such as the invoice and pledge forms and any email communications.

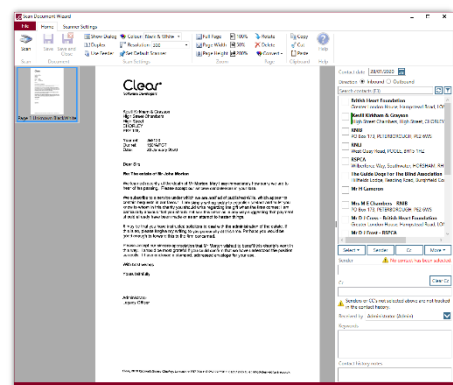
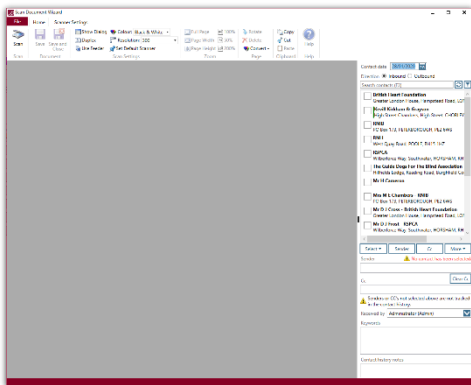
The Will browser can be used to quickly locate details about a particular Will. This browser also provides ways to report on the Will data and export data where required. Statistics such as invoice costs, current will status, promotion and ROI are available on this browser.

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.

Scanning



The FirstClass Document Scanning module allows you to quickly and easily scan a document directly into the contact history for a particular record.

The Scan Document Wizard, which comes as part of the FirstClass Document Scanning module, provides a “one-step interface” which allows you to scan the document and save it electronically into the contact history for the selected record. The wizard automatically creates a contact history record “tagged” with details of the sender of the document without you having to worry about file locations or specific scanner software.

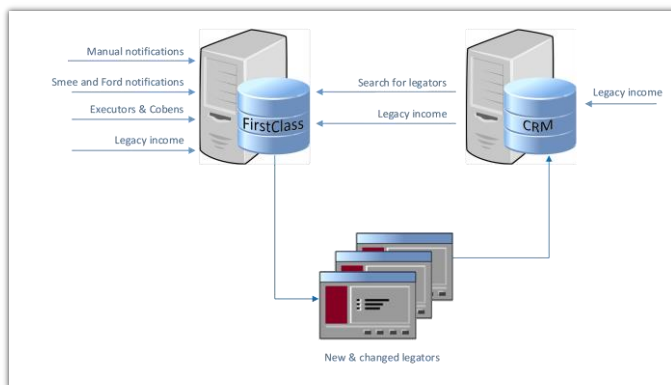
The Scan Document Wizard is available from the Correspond tab of all appropriate windows in FirstClass, making document scanning just a click away from wherever you are in the system. Whether you are a large charity dealing with large volumes of paper based documents or you are a smaller charity wanting to make it quick and easy to keep

electronic copies of your correspondence, the Document Scanning module enables you to quickly deal with paper based documents.

Scanned documents are quickly located via the Contact History tab of the associated record. The scanned document can be quickly displayed on screen and reprinted as required.

NB: A TWAIN compatible scanner is required. The scanner must be connected to the computer running FirstClass via a USB connection.

CRM integration



FirstClass can be configured to link to external CRM databases including Care, Microsoft Dynamics, Raiser's Edge 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 match, 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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