

FirstClass Cloud offers you the full version of FirstClass installed on Clear's own secure online Microsoft Azure platform 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. Clear manage the upkeep of the servers, including backups, with little or no IT support required from your IT team. It also allows connections from different locations so especially useful for those who work from home.

Key features of FirstClass - Cloud

- Rapid access to case records
- Multiple Addresses
- Legator aliases
- Important dates such as Last Will Date, Codicil Date and Probate Date
- Legacy types defined to meet your charity's requirements
- Multiple legacies associated with each legator.
- Outstanding Balance calculated and displayed on screen
- Income and expenditure
- Income Dashboard
- R185 Tax claims
- Record assets including details of shares, properties and gifts
- Asset Mix
- Estate Accounts
- IHT Calculator
- Unlimited customisable standard letters created at the click of a button
- Comprehensive contact history associated with each legacy
- Reviews Dashboard to work alongside the built in Review diary system
- Extensive set of built-in Reports
- Comprehensive ad-hoc reporting using the system browsers and Grid reports
- Easy to use point-and-click graphical user interface
- Uses Microsoft SQL Server - robust and scalable database engine
- Send and receive emails directly from FirstClass*
- Send standard letters as email attachments*

**Cloud:
flexible,
reliable, full
service piece
of mind**

Clear FirstClass

- Import electronic Smeed and Ford data
- PAF Integration

* (requires a compatible email service)

Modules

FirstClass Cloud users can also choose to purchase the following modules:

Legacy Prospect

The Legacy Prospect module is used by a number of FirstClass 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.

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.

Wills

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

Tools and Services

Clear can also provide the following tools and services to work alongside FirstClass Dedicated Hosted:

Data Import

Automatic loading of electronic data from Smeed and Ford. Other routines can be built to import data from a range of data sources.

Data Export

Data can be easily exported from all FirstClass reports and browsers. Additionally the Clear development team are very experienced in developing automatic routines that, for instance, export data on new and changed cases and legacy income. Data exported from

FirstClass can be loaded into a number of different systems including Care, Raiser's Edge, Agresso, Sage and Microsoft Dynamics. Please note: this is only available if all required servers are accessible to the hosted server.

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 and Excel.

Legacy Monitor

Clear have developed a number of 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.

www.legacyforesight.co.uk

CRM Integration

FirstClass can be configured to link to external cloud based CRM databases. 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.

A separate sheet is available to describe CRM integration in more detail.

Please note: this is only available if all required servers are accessible to the hosted server and configured appropriately.

System Requirements

FirstClass Cloud can be accessed from any Windows PC with a reliable 1Mb+ broadband connection.

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.

www.clear-software.co.uk

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An In-house installation offers you the full version of FirstClass installed at your charity. The database is installed on your SQL Server, and the FirstClass client is installed on each user's PC.

Your IT team are responsible for maintaining this infrastructure and we will work closely with them to ensure the smooth operation of FirstClass. They are also responsible for backing up your data and installing updates.

There are no restrictions on the number of user licenses that can be purchased.

Key features of FirstClass In-house

- Rapid access to case records
- Multiple Addresses
- Legator aliases
- Important dates such as Last Will Date, Codicil Date and Probate Date
- Legacy types defined to meet your charity's requirements
- Multiple legacies associated with each legator
- Outstanding Balance calculated and displayed on screen
- Income and expenditure
- Income Dashboard
- R185 Tax claims
- Record assets including details of shares, properties and gifts
- Asset Mix
- Estate Accounts
- IHT Calculator
- Unlimited customisable standard letters printed at the click of a button
- Comprehensive contact history associated with each legacy
- Reviews Dashboard to work alongside the built in Review diary system
- Extensive set of built-in Reports
- Comprehensive ad-hoc reporting using the system browsers and Grid reports
- Easy to use point-and-click graphical user interface
- Uses Microsoft SQL Server - robust and scalable database engine

**In-house:
fully
configurable,
giving you
total control**

Clear FirstClass

- Send and receive emails directly from FirstClass
- Send standard letters as email attachments
- Import electronic Smee and Ford data
- Integrate with a number of PAF systems

Modules

FirstClass In-house users can also choose to purchase the following modules:

Legacy Prospect

The Legacy Prospect module is used by a number of FirstClass 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.

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.

Wills

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

Tools and Services

Clear can also provide the following tools and services to work alongside FirstClass In-house:

Data Import

Automatic loading of electronic data from Smee and Ford. Other routines can be built to import data from a range of data sources.

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 cases and legacy income. Data exported from FirstClass can 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 and Excel.

Scanning

The FirstClass scanning module is used by a number of charities to scan documents directly into FirstClass and to associate them with the appropriate Legator, Legacy Prospect, Wills, Organisation, People or In Memoriam record. The scanned documents become an important part of the communication history for the associated record.

Legacy Monitor

Clear have developed a number of 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.

www.legacyforesight.co.uk

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 the CRM record is quick and easy from within FirstClass.

A separate sheet is available to describe CRM integration in more detail.

System Requirements

FirstClass In-house will run happily on any PC running Windows 7 or later.

The FirstClass data is stored in a Microsoft SQL database. If your charity already has SQL Server (version 2008 onwards) then the FirstClass database can be easily installed. Otherwise we can install a free version of Microsoft SQL Server for you.

FirstClass integrates with Microsoft Office and can also send and receive emails through Outlook.

See table below for compatibility:

Windows	7	8.1	10
Microsoft Office 2010	✓	✗	✗
Microsoft Office 2013	✓	✓	✓
Microsoft Office 2016	✓	✓	✓

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The Essentials version of FirstClass offers fewer advanced features than the In-house or Cloud versions and is accessed online via any suitable PC.

It is ideal for those charities with a smaller number of legacies.

Clear install FirstClass and all the related software on Clear's own secure online Microsoft Azure platform. Clear manage the upkeep of the servers, including backups, with little or no IT support required from your IT team. It also allows connections from different locations so especially useful for those who work from home.

The Essentials version is restricted to a maximum of 3 concurrent users from your charity.

Key features of FirstClass Essentials

- Rapid access to case records
- Multiple Addresses
- Important dates such as Last Will Date, Codicil Dates and Probate Date
- Legacy types defined to meet your charity's requirements
- Multiple legacies associated with each legator
- Outstanding Balance calculated and displayed on screen
- Income and expenditure
- Income dashboard
- R185 Tax claims
- Unlimited customisable standard letters created at the click of a button
- Comprehensive contact history associated with each legacy
- Review Dashboard to work alongside the built in Review diary system
- Small suite of built-in Reports
- Comprehensive ad-hoc reporting using the system browsers and Grid reports
- Easy to use point-and-click graphical user interface
- Uses Microsoft SQL Server - robust and scalable database engine

Essentials: the entry level option for smaller charities

Clear FirstClass

Modules

FirstClass Essentials users can also choose to purchase the following modules:

Smee & Ford

The Smee and Ford module enables the electronic import of Smee & Ford data.

Legacy Prospect

The Legacy Prospect module is used by a number of FirstClass 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.

Tools and Services

Clear can also provide the following tools and services to work alongside FirstClass Shared Hosted:

Data Export

Data can be easily exported from all FirstClass reports and browsers.

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 and Excel.

Legacy Monitor

Clear have developed a number of 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.

www.legacyforesight.co.uk

System Requirements

FirstClass Essentials can be accessed from any Windows PC with a reliable 1Mb+ broadband connection.

Please note the following features are not available in the Essentials version of FirstClass

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

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