



FirstClass Web is an all new version of the industry leading legacy management software from Clear, designed specifically for the needs of charities that manage a smaller number of bequests.

- Built specifically with small charities in mind
- Intuitive and easy to use
- Built in dashboard of legacy performance
- Web browser based to minimise IT costs and support.
- Low cost annual subscription
- Free support

FirstClass Web		Log Off		Clear	
<b>Add a Legacy</b> Input the details of a new legacy step by step	<b>Manage Legacies</b> 29 open legacies 1 contentious legacies	<b>Manage Reviews</b> 25 reviews pending 2 reviews overdue	<b>Manage Income</b> Track income for recorded legacies		
<b>View Reports</b> Reports for legacies, income and reviews	<b>View Contacts</b> View and print existing contacts	<b>Dashboard Data</b> £110,999.99 year to date £2,000.00 month to date	<b>System Information</b> Logged In User: Administrator Database: fcwdemo01 Version: 1.0.6970.21738 Support firstclass@clear-software.co.uk Tel: 01257 272730 © 2019   Site by Clear		

## About FirstClass

FirstClass is the UK's leading legacy management software. Originally designed over 20 years ago by a group of six charities, FirstClass has been continually developed and improved with over 80 charities using it today.

FirstClass 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.

With both in-house and cloud versions, it is used by most of the top 50 UK legacy brands and by many medium sized charities too.

Clear have found over the years that many smaller charities find the price of FirstClass to be prohibitive and so tend to manage their legacies by entering their legacy information into spreadsheets. These can be a great tool but actually running reports and reviewing data in a spreadsheet can be problematic. FirstClass Web has been developed to address this, being feature rich yet affordable.

## FirstClass Web

FirstClass Web is a new addition to the FirstClass family which brings together a core set of features in a user-friendly interface, accessible anywhere via a web browser. Designed for charities who receive a smaller number of legacies and are looking to manage those legacies efficiently and realise the greatest income for their cause.

We know that no matter the size, every charity needs effective legacy management. Running reports and reviewing data through a spreadsheet can be problematic and we don't believe smaller charities should have to deal with this. That is why, using our many years of experience developing legacy management software, we have developed an application that allows smaller charities, on a limited budget, access to the features they need to manage their legacies.

FirstClass Web uses the same database as our other FirstClass products, so upgrading is straight forward to do - as your charity legacy income increases, FirstClass can grow with you.

FirstClass Web is accessed through an online platform, with no software to install. You can add and manage legacies with ease. Alongside the standard legacy information, FirstClass Web allows you to record legacy income, estimates, reviews, contacts and a complete contact history. This data can then be used to generate comprehensive reports in no time at all.

Our aim is to make professional legacy management accessible for all, and with our existing FirstClass applications, FirstClass Web helps us to achieve that.

## Key features of FirstClass Web

**Legacies** - easily add a new legacy including address details, key dates and probate details.

**FirstClass Web** Legacy Log Off Clear

Legacy ID: 150

**Legator**

Please complete all the mandatory fields marked with an \*

\*Surname: Morton  
 \*Title: Mr  
 Forenames: John  
 Initials: J  
 \*Sex: Male  
 Marital status: (Unknown)  
 Date of birth: 01/11/1936  
 Year of birth: 1936

Address 1: 52 St Georges St  
 Address 2:  
 Address 3:  
 Address 4:  
 Town: Chorley  
 County: Lancashire  
 Postcode: PR7 2AA  
 Country: United Kingdom

Known prior: Known  
 CRM reference:  
 Date of death: 14/09/2017  
 Age at death: 80  
 Year of death: 2017

**Probate**

\*Date notified: 02/10/2017  
 Last will date: 25/09/2015  
 Codicil date:  
 Probate date: 23/11/2017  
 Will clause: Bequest details, such as amounts, other charities named in will, any restrictions, conditions etc...

Registry: Cardiff  
 Executors first letter: 02/10/2017  
 Copy will received:  
 Assets/liabilities:  
 Gross value:  
 Net value:  
 Not exceeding value:

**Legacy**

\*Legacy status: Open  
 \*Legacy type: Residuary  
 Date opened: 02/10/2017  
 Share: 1 / 3 ( 33.33 %)  
 Restricted  
 Discretionary

**Estimates** - record an estimate against each legacy to show how much income your charity is expecting to receive. You can also record the date you are hoping to receive this income.

**Reviews** - add a review against each legacy. You can then use the Manage Reviews browser to see at a glance the position of all the reviews.

**FirstClass Web** Reviews Log Off Clear

Click 'Apply' below to refresh the grid

Forenames	Surname	Legacy Type	Review Date	Review Reason	Review Notes
Harry	Martin	Pecuniary	02/02/2019	General	Sed voluptat ipsum in metus cursus auctor. Mauris et ullamcorper ligula. a pretium massa.
Stella	Irving	Residuary	07/02/2019	General	Aenean cursus massa ligula. id viverra justo bibendum at. Vestibulum ac mattis ipsum, in scelerisque augu
Sarah	Kirby	Residuary	08/02/2019	General	Morbi vitae nisi risus. Cras tristique molestie enim et pretium. Nam imperdiet, tortor ut porttitor tincidunt.
Sarah	Parry	Pecuniary	11/02/2019	General	Aenean cursus massa ligula. id viverra justo bibendum at. Vestibulum ac mattis ipsum, in scelerisque augu
Jessie	Kennedy	Pecuniary	12/02/2019	General	Morbi vitae nisi risus. Cras tristique molestie enim et pretium. Nam imperdiet, tortor ut porttitor tincidunt.
Hilda	Oysten	Pecuniary	14/02/2019	General	General Review
George	Archer	Pecuniary	15/02/2019	General	Aenean cursus massa ligula. id viverra justo bibendum at. Vestibulum ac mattis ipsum, in scelerisque augu
William Edward	Hawkins	Residuary	17/02/2019	General	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc ut est auctor, consectetur neque nec, facilisi
Reginald	Slater	Life Interest Residuary	19/02/2019	General	Aenean cursus massa ligula. id viverra justo bibendum at. Vestibulum ac mattis ipsum, in scelerisque augu
Margaret Ellen	Norris	Pecuniary	23/02/2019	General	Aenean cursus massa ligula. id viverra justo bibendum at. Vestibulum ac mattis ipsum, in scelerisque augu
Ivy May	Pearce	Pecuniary	25/02/2019	General	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc ut est auctor, consectetur neque nec, facilisi
John	Morton	Residuary	25/02/2019	Estate accounts due	Confirm solicitors accounts and check with Jim
John	Morton	Pecuniary	26/02/2019	General	Close legacy!
John	Morton	Pecuniary	27/02/2019	General	Confirm details with Chorley branch
Glenda	McQueen	Residuary	28/02/2019	Estate accounts due	

Review Reason: (All)  
 Review From: 01/02/2019  
 Review To: 28/02/2019

Apply  
 Export to CSV

**Income** - record the income received. Record multiple income receipts against each legacy. The Manage Income browser lets you easily see what income your charity has received over a given period.

FirstClass Web  
Income

Log Off  
Clear

Click 'Apply' below to refresh the grid

Received From: 01/01/2018  
Received To: 31/12/2018  
Legacy ID:  
Legacy Type: (All)  
Surname:

Forenames	Payment Method	Date Received	Amount Received	Town	County	Postcode
John	Cheque	29/06/2018	£500.00	Chorley	Lancashire	PR7 2AA
Derek	Cheque	23/04/2018	£46,500.00	Chorley	Lancashire	PR2 2DF
Jessie	Bank Credit	22/03/2018	£1,000.00	Chorley	Lancashire	PR5 5GI
Doreen	Cheque	27/09/2018	£99,999.99	Manchester	Greater Manchester	M4 5NP
Marjorie E	Bank Credit	20/10/2018	£4,000.00	Manchester	Greater Manchester	M7 1QS
Laura	Cash	21/11/2018	£5,000.00	Chorley	Lancashire	PR1 3SU
William Edward	Cash	09/06/2018	£4,000.00	Chorley	Lancashire	PR3 0KP
			Total: £160,999.99			

Apply  
Export to CSV

**Contacts** - store information about a person, organisation or employee that you are liaising with regarding a legacy, e.g. executor, lay-executor, people at other charities, family members, etc. Use the Contact Wizard to easily add a new contact.

Contacts

Role	Organisation	First Name	Surname	Active
Executor	Kevill Kirkham & Grayson			True
Co-beneficiary	The Hedgehog Charity			True
Family and Friends		Fred	Smith	True

Add Edit Delete

**Contact History** - you can manually create contact history records to record all communication associated with a legacy. You can record phone calls made and received as well as letters and email.

Contact History

Contact Date	Contact Method	Direction	Contact Name
04/02/2019	Letter	Inbound	Kevill Kirkham & Grayson
06/02/2019	Phone	Inbound	Fred Smith

Add Edit Delete

**Browsers** – enable you to search and view the legacies, income and reviews that you have recorded in FirstClass Web. The information shown in the browsers can also easily be exported to a CSV file, which can then be imported into Excel.

**FirstClass Web** Manage Legacies Log Off Clear

Click 'Apply' below to refresh the grid

Legacy ID:

Legacy Type: (All)

Surname:

Forenames:

Legacy Status: (All)

Postcode:

Notified From: 01/07/2018

Notified To: 06/02/2019

Apply | Export to CSV

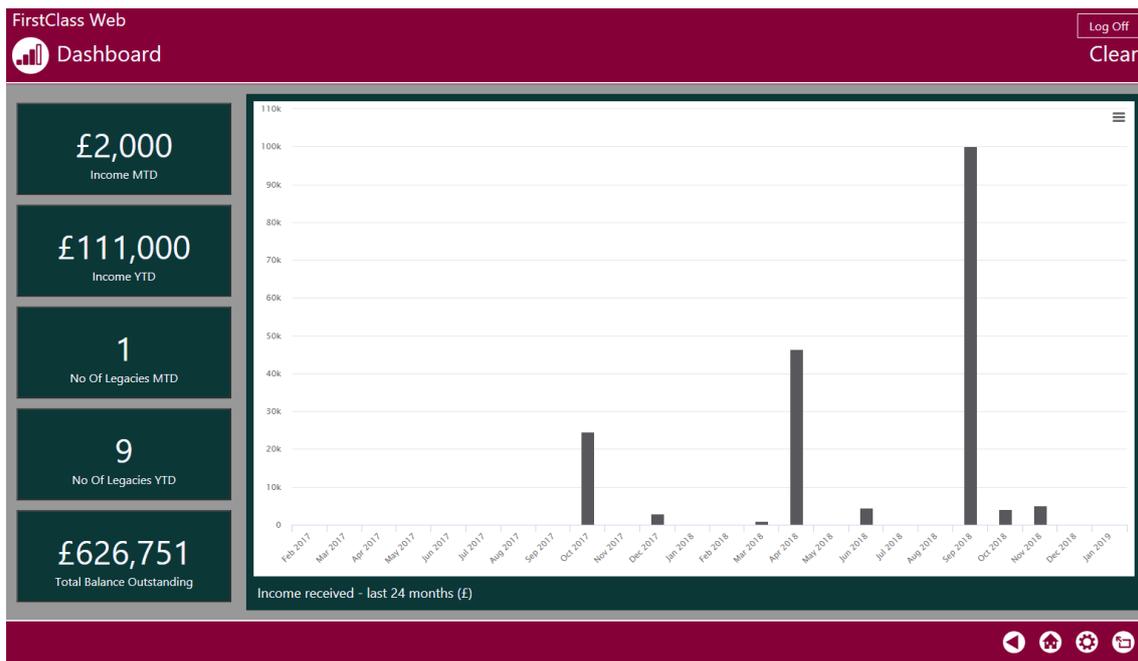
Title	Surname	Forenames	Postcode	Date Notified	Date Opened	Date Closed	Status	Estimate Method	Est
Mrs	Parry	Sarah	SW3 2WV	10/08/2018	10/08/2018		Open	Smee and Ford	10,000
Miss	Kennedy	Jessie	PR4 3XW	08/10/2018	08/10/2018		Open	Smee and Ford	08,000
Mr	Archer	George	PR7 6AC	17/09/2018	17/09/2018		Open	Smee and Ford	17,000
Mrs	Pearce	Ivy May	M1 2KM	02/07/2018	02/07/2018		Open	Smee and Ford	02,000
Mr	Gilbert	John Henry	M2 4TV	22/08/2018	22/08/2018		Open	Smee and Ford	22,000
Miss	Potter	Nellie	M8 3ZE	01/12/2018	01/12/2018	22/01/2019	Closed		
Mr	James	Jesse		07/01/2019	31/01/2019		Open	Estate Accounts	08,000
Miss	McQueen	Glenda		11/01/2019	31/01/2019		Open	Assets and Liabilities	15,000
Mrs	Smith	Anna	PR7 2AA	06/02/2019	06/02/2019		Open	Solicitor Notification	06,000

**Reports** - key number of built in reports are available. The reports can be printed (if you have a local printer connected) or exported to a CSV file.

**FirstClass Web** Closed Legacies - Time Taken (Web) Log Off Clear

Legacy Type	Legacy ID	Title	Initials	Surname	Last Will Date	Date of Death	Age of Will (Weeks)	Date Notified	Date Closed	Admin Time (Weeks)
Life Interest Pecuniary	1009	Miss	M E	Morris	07/07/2014	16/04/2017	145	12/06/2017	11/08/2017	8
Life Interest Pecuniary	1019	Mr	N	Crawford	14/11/2010	13/09/2014	199	21/10/2014	20/12/2014	8
Life Interest Pecuniary	1029	Mr	P J	Sutherland	15/02/2013	14/12/2016	200	17/01/2017	18/03/2017	8
Life Interest Pecuniary	1039	Miss	N	Potter	15/10/2013	03/10/2018	259	01/12/2018	22/01/2019	8
Life Interest Pecuniary	1049	Miss	L M	Davidson	13/10/2014	20/03/2017	127	11/05/2017	10/07/2017	9
Life Interest Residuary	1028	Mr	D J	Cook	17/09/2009	13/01/2015	278	31/03/2015	30/05/2015	8
Pecuniary	1000	Mrs	I M	Willis	25/05/2010	13/03/2014	198	30/05/2014	29/07/2014	9
Pecuniary	1002	Mrs	M	Martin	15/11/2009	26/07/2015	297	11/09/2015	10/11/2015	9
Pecuniary	1003	Miss	M	Baker	06/06/2011	16/03/2017	301	21/04/2017	20/06/2017	9
Pecuniary	1004	Mrs	M	Roberts	21/01/2014	04/06/2015	71	28/08/2015	27/10/2015	9
Pecuniary	1012	Mr	K	North	12/04/2010	09/10/2014	234	30/11/2014	29/01/2015	8
Pecuniary	1013	Miss	M	Gould	27/05/2013	19/11/2014	77	13/02/2015	14/04/2015	9
Pecuniary	1020	Mrs	J	Hayward	06/03/2011	21/07/2017	332	24/08/2017	23/10/2017	9
Pecuniary	1021	Mr	D J	North	12/04/2009	08/10/2013	234	29/11/2013	28/01/2014	9
Pecuniary	1023	Miss	P	Knowles	14/10/2011	02/03/2015	177	02/05/2015	01/07/2015	9
Pecuniary	1030	Mrs	M E	Sadler	30/07/2012	27/01/2018	286	14/03/2018	13/05/2018	9
Pecuniary	1032	Mrs	L	Ferguson	13/12/2014	15/02/2018	166	13/04/2018	12/06/2018	9
Pecuniary	1034	Mrs	B	Hammond	15/03/2011	17/02/2014	153	12/04/2014	11/06/2014	9
Pecuniary	1040	Mrs	K M	Lindsay	01/09/2014	15/01/2017	124	05/03/2017	04/05/2017	8
Pecuniary	1041	Miss	B	Fleming	12/09/2009	27/01/2015	281	19/03/2015	18/05/2015	9
Pecuniary	1042	Mr	D J	Abbott	18/04/2012	06/10/2014	129	24/11/2014	23/01/2015	8

**Dashboard** - this provides a snapshot of your recent legacy performance using key performance indicators.



## Cost

Only **£300 + VAT** per year

### Free 30-day trial

Not sure if FirstClass Web is for you?

If you would like to try FirstClass Web, we are happy to offer you a no obligation 30-day trial, completely free of charge. Please ask us for further details.

If you would like to start using FirstClass Web at your charity please contact Alison Parker - [alison@clear-software.co.uk](mailto:alison@clear-software.co.uk) or call us on 01257 272730.