



# FirstClass In-house

Fully configurable, giving you total control

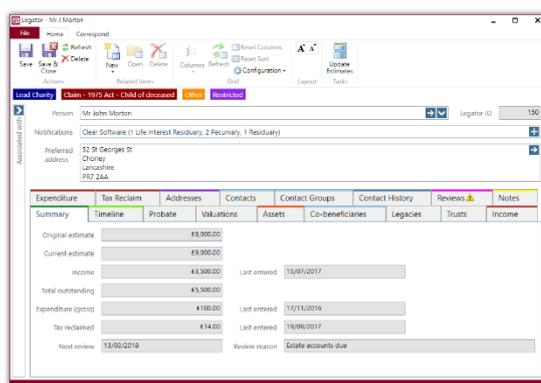
## FirstClass

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 over 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 In-house



The in-house version of FirstClass offers unparalleled quality and ease of use. FirstClass in-house 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 data held within FirstClass in-house is stored in a database on your charity's own Microsoft 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 licences that can be purchased.

# Key Features

## Rapid access to data

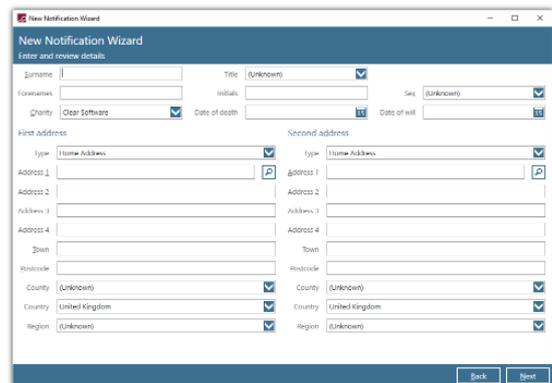
FirstClass is used to keep track of all charitable legacies due and received, providing instant access to pipeline information whenever it's needed.

## 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.



## 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 and emails

FirstClass has the ability to use standard letter and email 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.

## Reports

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

## 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.



## Assets and estate accounts

The Estate valuation window is used to store assets and liabilities along with draft and final estate accounts. Using the Asset window you can record individual assets, e.g. Cash, Property, Investments, Other. There is also a built in IHT calculator.

## Contacts

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

## Probate information

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

## Person details

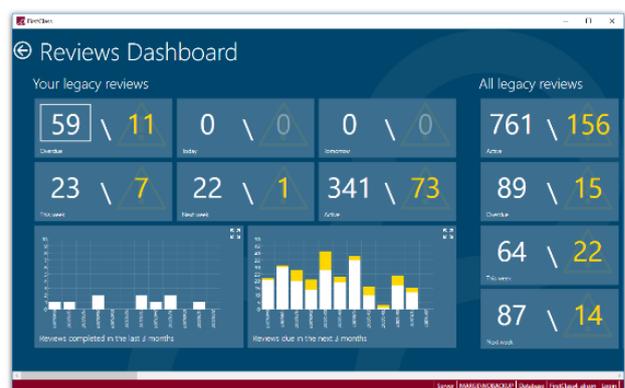
Each person can be saved with multiple addresses along with aliases to record other names that the person may also be known as.

## Browsers

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

## 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.



## Tax reclaim

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

## Info headers

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

## Wizards

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

The screenshot shows a 'Timeline' view for a legacy. The top section contains fields for 'Notification', 'Status', 'Date opened', 'Date closed', 'Handler', 'Legacy ID', and 'Previous date closed'. Below this is a table with columns for 'Date', 'Age', 'Description', and 'User'. The table contains several rows of data, including '18/10/2016 - 1y 3m - End of life', '18/10/2016 - 1y 3m - State of death', '18/10/2016 - 1y 3m - Clear Software notification', '18/10/2016 - 1y 3m - Executor list sent', '18/10/2016 - 1y 3m - Assets & liabilities valuation received', '18/10/2016 - 1y 3m - Resolatory report opened', '18/10/2016 - 1y 3m - Resolatory report opened', and '18/10/2016 - 1y 3m - Resolatory estimate (1,500,000) (Current) Sme and Ford - Restricted - Bolton Branch'. The 'User' column lists 'Administrator' for most entries.

## 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.

## PAF

FirstClass can integrate with a number of different online PAF systems to help with address validation.

## Additional modules

Several modules are available to purchase to work within the FirstClass system including Legacy Prospects, In Memoriam, Scanning, CRM Integration (available for both in-house and cloud-based CRMs) and Will Scheme.

## 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 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.

### 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.

### Scanning

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

### 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.

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 In-house.

### 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

### Legacy administration

- FirstClass is quick and easy to use – legacy officers find FirstClass intuitive and a real benefit.
- Loading electronic notifications provided by Smee and Ford data through the built-in wizard reduces the time spent performing manual data entry.
- User customisable standard letters and emails 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 two dates, income between two 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 £1m.

<p>Increase on Legacy Income of £1m by 1%</p> <p><b>Increase of £10k per year</b></p> <p>Increase on Legacy Income of £1m by 5%</p> <p><b>Increase of £50k per year</b></p>
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## Other Versions

There are other versions of FirstClass available:

- FirstClass Cloud
- FirstClass Essentials
- 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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