



# FirstClass

## Product comparison



	FirstClass In-house	FirstClass Cloud	FirstClass Essentials
<b>Core Functionality</b>			
The ability to keep track of all charitable legacies due and received	✓	✓	✓
Multiple legacy elements associated with each legator.	✓	✓	✓
Multiple contacts recorded, including both lay and professional along with any relationship with the legator.	✓	✓	✓
Each person can be saved with multiple addresses and aliases.	✓	✓	✓
A complete contact history is maintained for each legacy.	✓	✓	✓
Built in wizard to take you through the full process of recording new manual notifications.	✓	✓	✓
Built in wizard to take you through the full process of recording electronic notifications (Smee & Ford)	✓	✓	Optional extra
The ability to record both income and expenditure against each legacy	✓	✓	✓

	FirstClass In-house	FirstClass Cloud	FirstClass Essentials
A history of estimated values can be recorded along with associated expected income records.	✓	✓	✓
An Income dashboard to provide a quick and easy picture of recent legacy performance.	✓	✓	✓
Ability to store assets and liabilities along with draft and final estate accounts.	✓	✓	
A built in IHT calculator.	✓	✓	
A built-in report to produce the data required for HMRC R185 tax reclaim.	✓	✓	✓
Accrual records can be added through a batch process.	✓	✓	
Create your own standard letters templates including digital signatures.	✓	✓	✓
A simple built in process for producing standard letters.	✓	✓	✓
Create your own email templates	✓	✓	
A simple built in process for sending and importing emails	✓	✓	
An extensive set of built-in financial and managerial reports.	✓	✓	✓
Legacy Monitor - built in reports to provide quarterly and market audit data quickly and easily. Only for members of the Legacy Monitor programme.	✓	✓	✓
Important dates stored such as Last Will Date, Codicil Date, Probate Date, Date Notified.	✓	✓	✓

	FirstClass In-house	FirstClass Cloud	FirstClass Essentials
Includes up to 30 built in customisable browsers allowing users to interrogate data easily and efficiently.	✓	✓	✓
Powerful browser summaries are available on all browsers to enable you to group, total and pivot data in a quick and easy way	✓	✓	✓
Multiple reviews can be stored against each legacy and assigned to individual handlers.	✓	✓	✓
A reviews dashboard to show the position of all open reviews.	✓	✓	✓
Info Headers are displayed to quickly draw your attention to important information.	✓	✓	✓
A tabular timeline view to show the progress of the administration of each legacy.	✓	✓	✓
Shortcuts are provided to access certain functionality and data quickly.	✓	✓	✓
The ability to integrate with several different online PAF systems to help with address validation.	✓	✓	
Built in anonymisation/pseudonymisation processes for GDPR	✓	✓	✓
Frequently used browsers and reports can be pinned onto the main screen to allow quick access.	✓	✓	✓
A Global replace tool is provided to help you remove duplicates and cleanse selected parts of the FirstClass data	✓	✓	✓
Contentious legacies can be managed using Issues. Issues can also be rated for their reputational and financial risk	✓	✓	✓

	FirstClass In-house	FirstClass Cloud	FirstClass Essentials
A complexity level can be recorded for each legacy	✓	✓	✓
Maximum concurrent user licences available	Unlimited	Unlimited	3
Installed on your charity's own network and servers.	✓		
Installed on Clear's own secure online Microsoft Azure platform. Accessed online via any suitable PC.		✓	✓
<b>Optional modules available at an extra cost</b>			
Legacy Prospect module - to record the complete Legacy Prospect journey	✓	✓	✓
In-Memoriam module - to manage In Memoriam donations.	✓	✓	✓
Will Scheme module - to record details about all the people who use your will writing service.	✓	✓	✓
Scanning module - to scan documents directly into FirstClass and to associate to the relevant record.	✓	✓	
CRM integration - to link to external CRM databases	✓	✓ (cloud-based CRMs only)	✓ (cloud-based CRMs only)

	FirstClass In-house	FirstClass Cloud	FirstClass Essentials
Optional Tools and Services available at an extra cost			
Data import routines - built to import data from a range of data sources directly into FirstClass.	✓	✓	✓
Data export routines - built to export specific data from FirstClass.	✓	✓	✓
Data Migration - data can be migrated from a range of different systems and data formats.	✓	✓	✓

## 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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