FirstClass In-house

Fast, reliable integration with your CRM system

CRM Integration

FirstClass In-house offers you seamless integration with your charity's CRM system. With two integration levels available, FirstClass can provide a linked solution to match your charity's requirements.

CRM Integration Standard

CRM Integration Standard provides you with a quick and easy way to associate your FirstClass records to the appropriate matching record on your CRM.

When a person record is created within FirstClass, you can search through your CRM database to find a matching CRM person record (aka Constituent, Contact, etc). If a match is found, the FirstClass person record is automatically updated with your CRM Reference number plus several other details if required. If a matching record on your CRM cannot be found, then a new person record can be created on your CRM using the data entered into FirstClass*.

FirstClass legator income records can also be linked to an income record (aka Gift, Payment, etc) on your CRM database using the same technique. If a matching record cannot be found on your CRM, then a new income record can be created using the data entered in FirstClass*.

Once linked, the person and income records can also be opened on your CRM package from within FirstClass**.

The New Notification Wizard, built into FirstClass, makes use of these features and allows the integration to be carried out automatically as part of the new notification process.

CRM Integration Advanced

CRM Integration Advanced extends your CRM Integration Standard capability with batch routines to bulk verify and update records across FirstClass and your CRM. The following routines are currently available and additional routines can be built to meet your requirements. These routines work by updating your FirstClass data based on data within your CRM or vice versa.

Lookup synchronisation
Routines to synchronise Titles, Counties and Countries.

Deceased status verification

Routines to check the deceased status for linked records in FirstClass and the CRM.

Person matching

Routines to match people stored on FirstClass to records on your CRM.

Person mismatches report

Compares selected data on your CRM with linked person records in FirstClass.

Person address synchronisation (CRM to FirstClass)

Updates the preferred address stored on FirstClass. Also, updates selected "never contact" markers

Alias synchronisation

Removes the "alias" stored on your CRM that identifies a record as linked to FirstClass*. Adds an "alias" to your CRM for each person stored in FirstClass that has a CRM Reference*. Updates your CRM Reference stored on FirstClass using the "alias" stored on your CRM that identifies a record as linked to FirstClass.

Legacy income synchronisation (FirstClass to CRM)

Updates your CRM with details of legacy income stored in FirstClass*.

Legator synchronisation (FirstClass to CRM)

Provides options to synchronise various attributes stored on the CRM person record that summarise information stored on FirstClass regarding a legator*.

Legator constituency code Synchronisation

Adds or updates a "Legacy Notified" constituency code on your CRM for each legator stored on FirstClass that has a CRM Reference*

*Subject to your CRM, if your CRM does not support this functionality alternative "exports" can be built to provide similar functionality.

**Subject to your CRM, if your CRM does not support this functionality FirstClass will display a "read only" window showing data from your CRM.

CRM Integration Considerations

An important part of any successful implementation of FirstClass is to consider how it integrates to other systems used by the charity, specifically the CRM and Finance systems. From our experience every charity seems to have their own approach about how this should happen.

Over the last ten years Clear have been developing ways for FirstClass to integrate with other systems. This includes direct links between FirstClass and a charity's CRM and providing export files for loading into CRMs and finance systems.

Many charities that use FirstClass do not employ any specific electronic links, however all charities need to decide what data is entered into which system. In particular each charity needs to decide whether or not all legators should be entered into their CRM.

For some charities, their CRM is just used to hold information about live people and if a legator was previously unknown to the charity they will not be entered into the CRM. If the legator was in the CRM they will need to be marked as deceased. However, for other charities there must be a record for every legator in their CRM, whether or not the legator was known by a charity prior to their death.

The second decision that a charity must make is about what to do with their legacy income. From the point of view of the legacy administrators, legacy income must be entered into FirstClass because the receipt of income will affect the legacy pipeline and trigger communications that the legacy officer will need to make with executors and possibly fellow co-beneficiaries. FirstClass reporting for income receipts, the legacy pipeline, accruals and legacy monitor requires accurate recording of all legacy income received. (NB this is actual income through the door and not accrued income.)

How a charity handles the receipt of cheques and bank transfers and how this information reaches their finance systems should also be considered. For some charities all income, including their legacy income, is entered into their CRM. For some of these charities their income passes into their finance system from their CRM. The legacy administration team often have specialist information about how restricted income should be allocated. Legacy income in FirstClass can be coded to provide this information.

Duplication of data entry can be a concern for some charities, while others are quite happy to double enter data on legators and their legacy income. Charities with lower numbers of legacies find duplication of data entry easier to accept. Something to note about legator records in any CRM system is that following their death their biographical details will not change. Also, from the point of view of legacy income, a charity will usually have low numbers of legacy income receipts.

Most of the information recorded in FirstClass concerns the administration of the estate. This includes data about contacts associated with the legacy (i.e. executors and co-beneficiaries) and the legacy team's communication history with these contacts. Legator specific data including estate valuations is also recorded in FirstClass. None of this data is usually of interest to users of the CRM and finance systems. FirstClass provides strong case management functionality for the legacy team.

Another important area that also needs to be considered is where reporting for legacy marketing should take place. Can all this reporting be provided through the CRM? If not does some marketing information about the legator need to be entered into FirstClass? Sometimes this is as simple as - was the legator known to the charity prior to their death. If the legator was already known to the charity, then some charities also want to know something about the nature of the relationship between the legator and their charity, for instance if the legator was a pledger, supporter etc. Clear have developed a number of charity specific reports, for instance reporting on legacy income and notifications by supporter type.

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.

Email	info@clear-software.co.uk
Call	+44 (0)1257 272730
Web	www.clear-software.co.uk