

## New Release News – December 15, 2016

### Our Best New Features for You!

Today, we have released several new features for Fundly CRM v2 and Fundly Connect that we think you're going to really enjoy:

#### CRM:

- Payment Gateway Settings
- Optional Donation on Online Check Out
- Donation Premiums Tutorials and "Year End Thank Yous, Premiums, and Ask Arrays"
- Ask Arrays in Donations - Update
- Add Account and Class to Invoice Other Items
- Ability to Delete Account and Class from Financial Transactions
- Duplicate Prevention - Update
- Reporting Huddle Reminder

#### Connect:

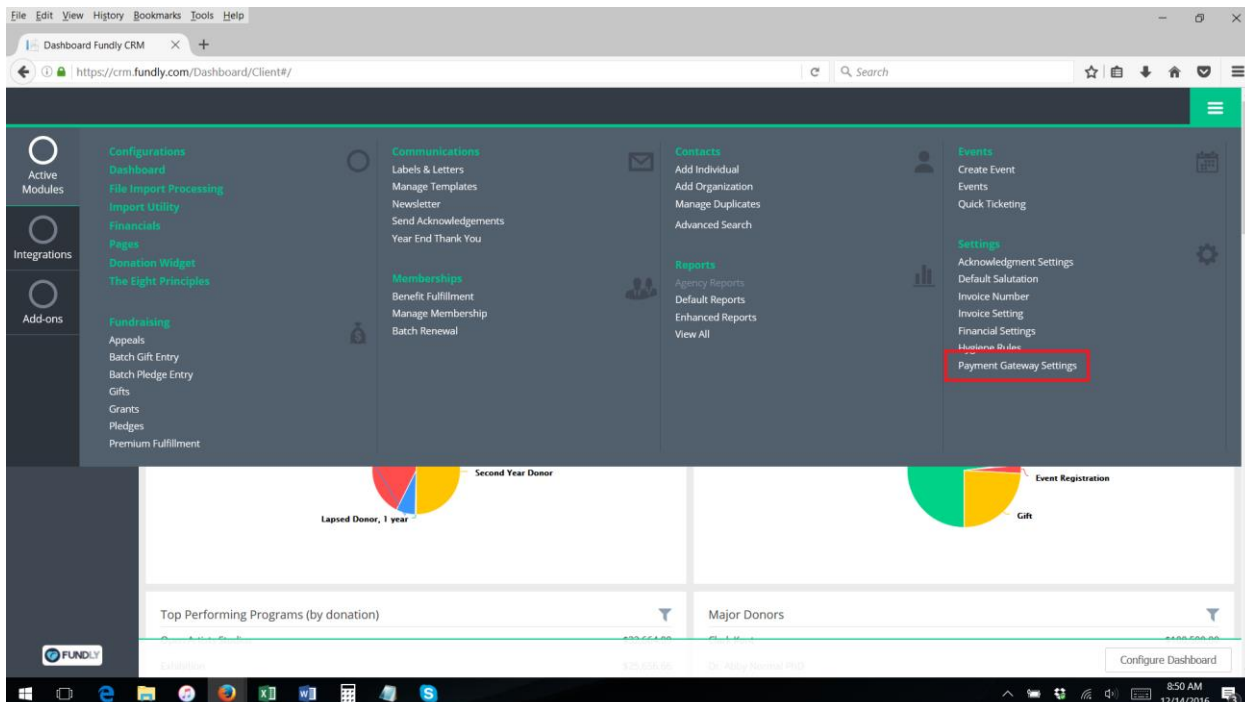
- Organization 'Joining Date' as Filter

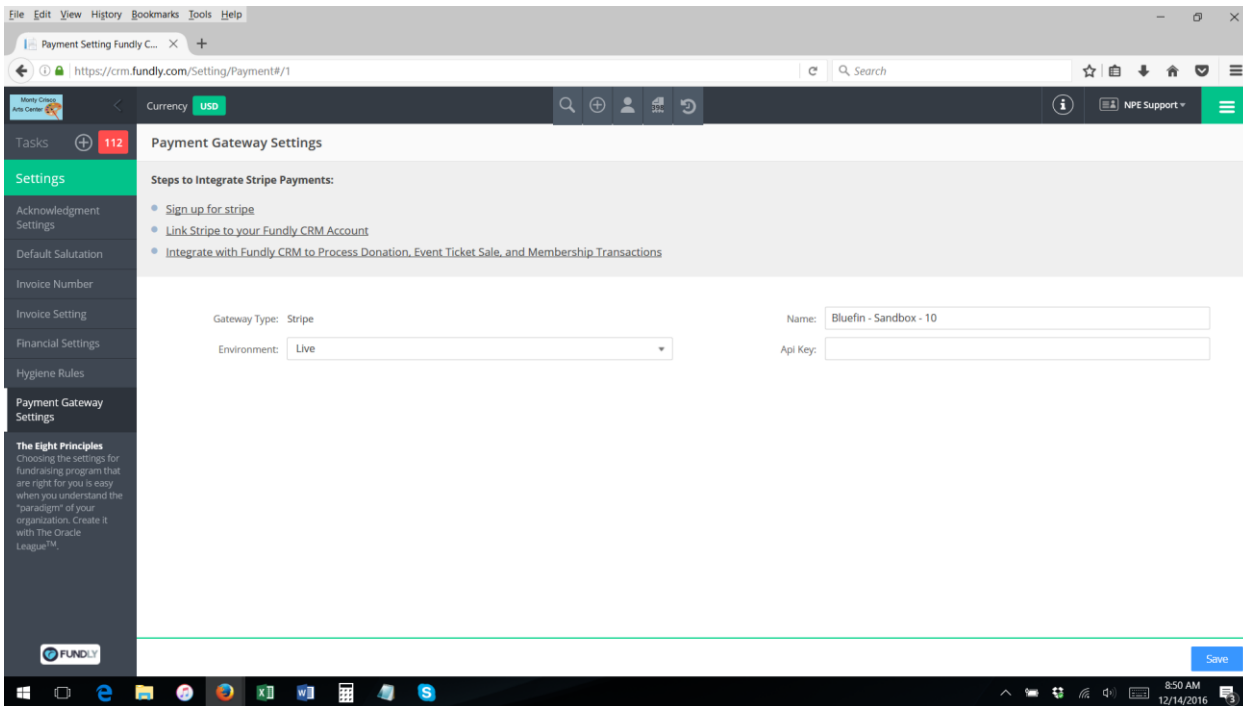
Read on for all the details!

*(if images are not displaying correctly in this email, you can find a copy of this newsletter in our Connect and CRM v2 Support Libraries)*

### Payment Gateway Settings

We've made setting up your payment gateway (credit card processor) integration even easier, by providing links to the set-up tutorials directly from the Payment Gateway Settings screen.

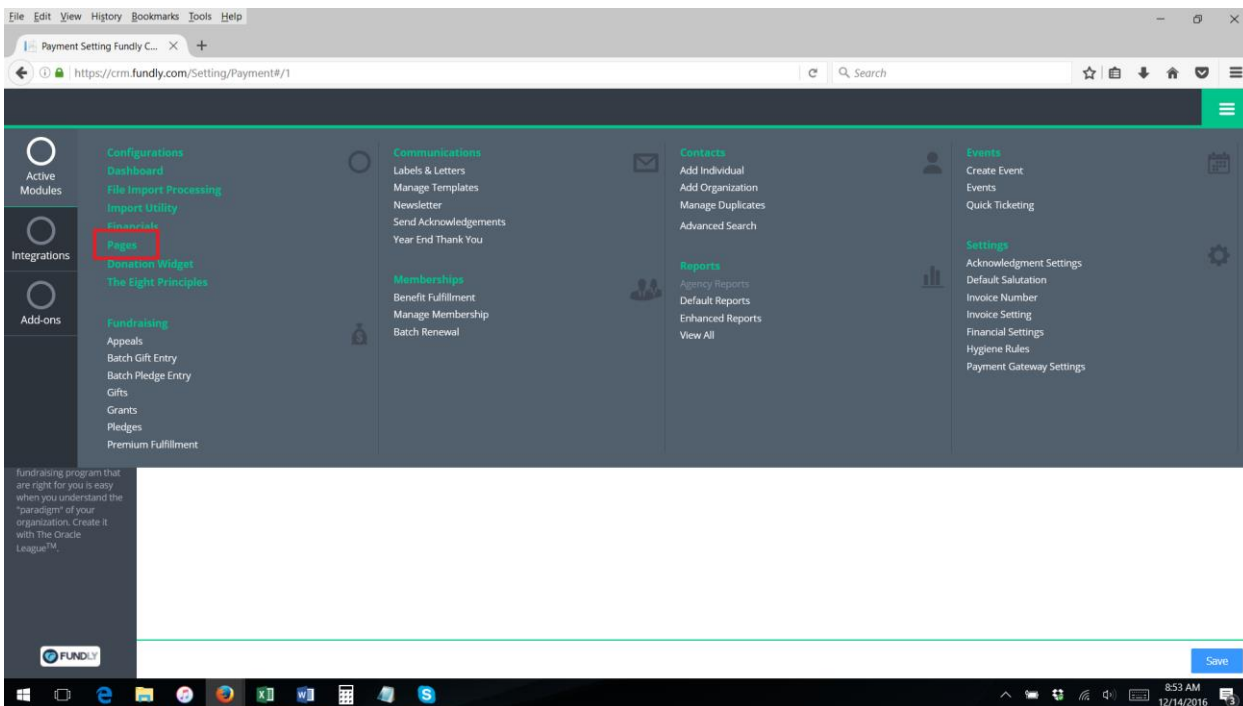




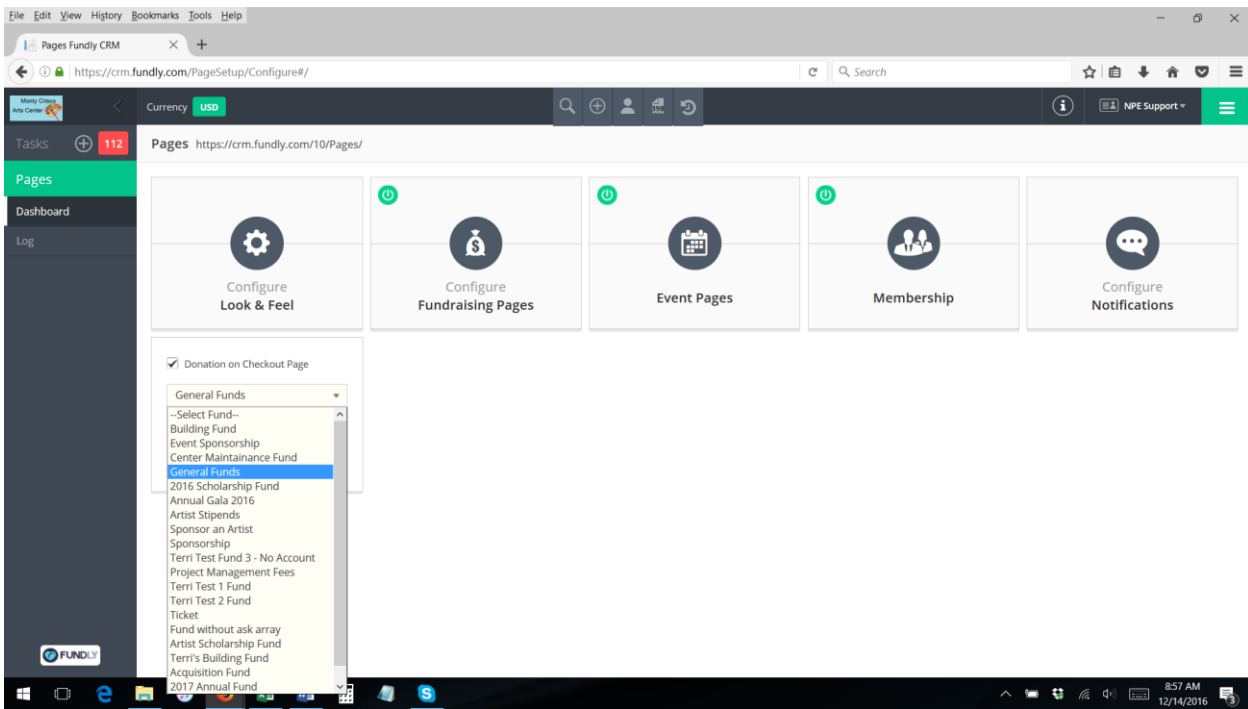
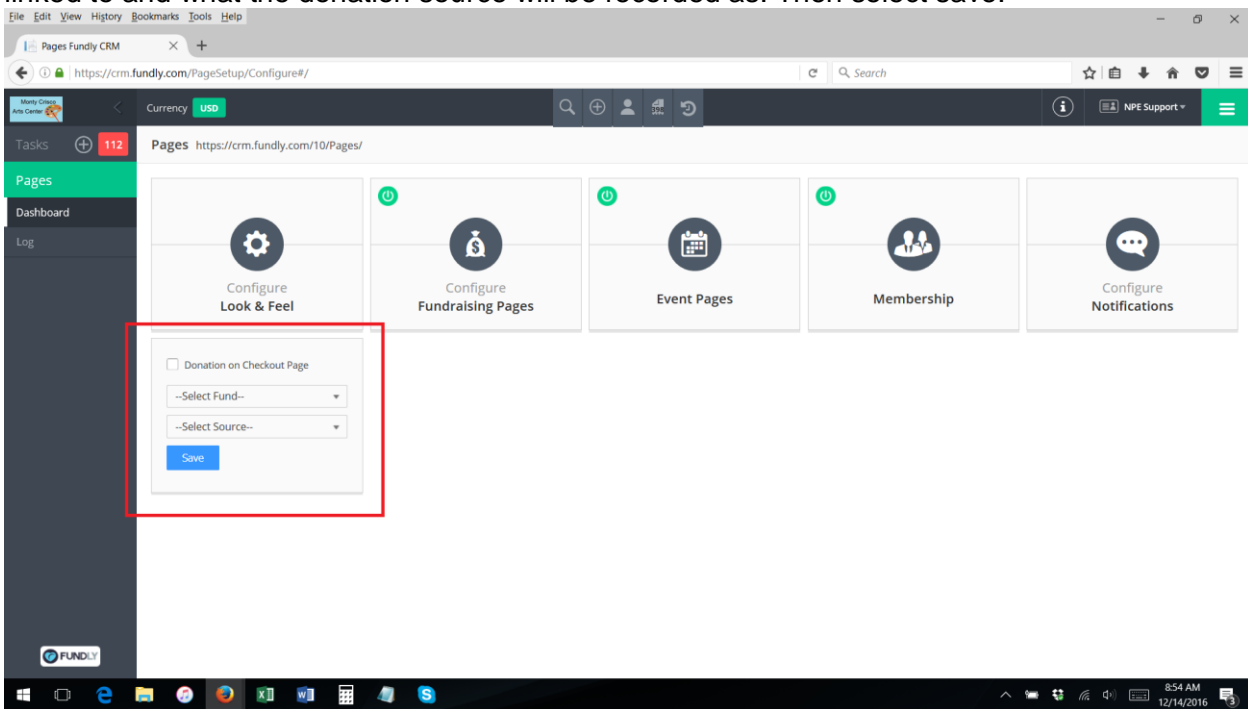
## Optional Donation During Online Check Out

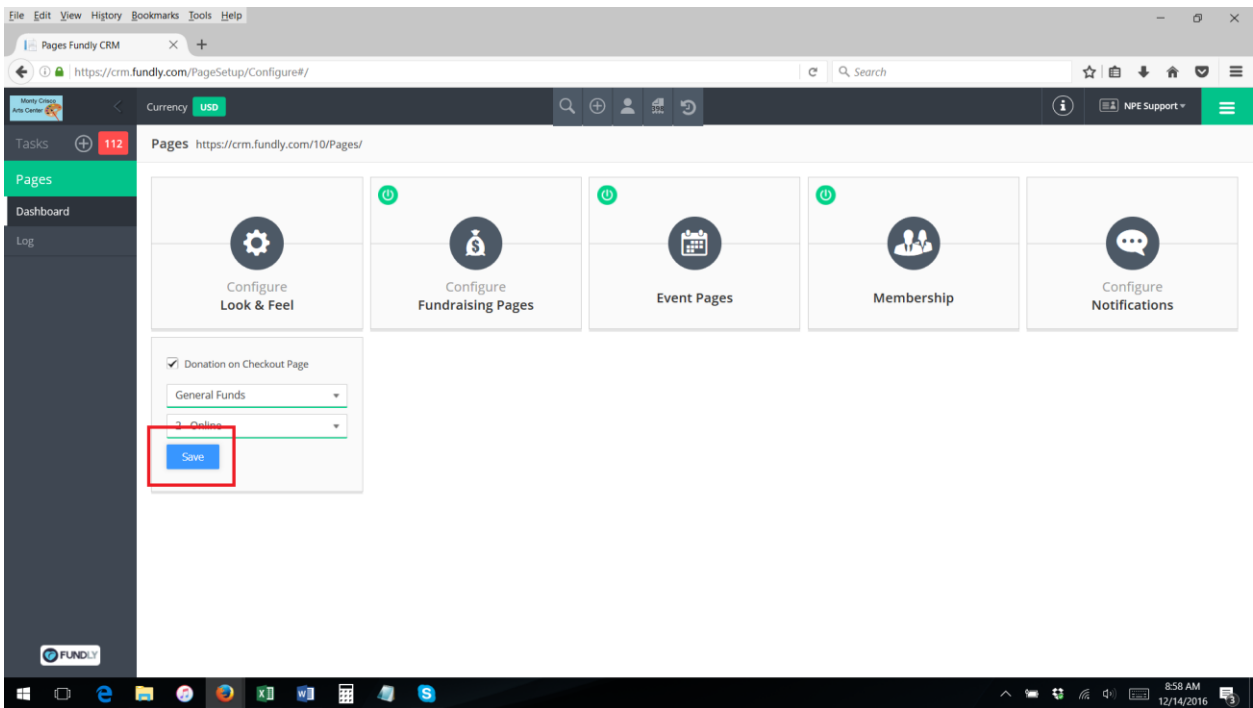
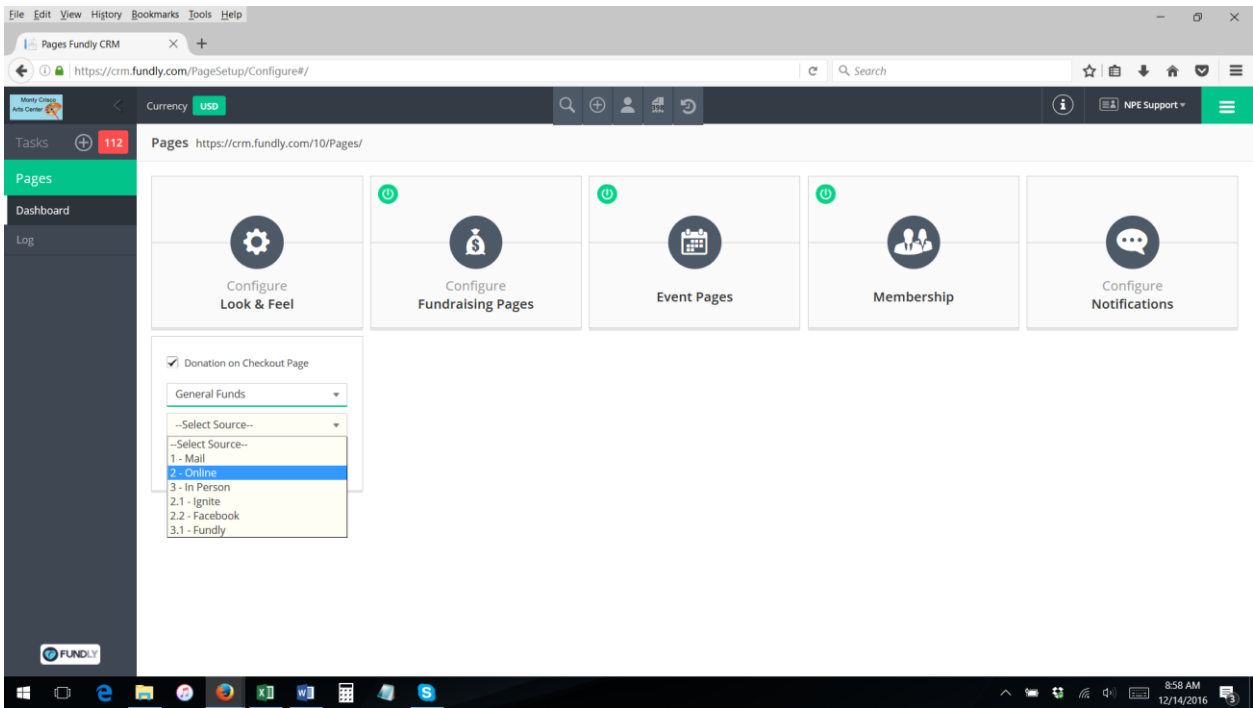
We know you're excited for this one! Users who have integrated their events module with their website via Pages now have the ability to ask for optional donations at event registration check out and membership (join or renew) check out. This feature is also available to clients who use our Word Press donation plug-in in conjunction with our WordPress event and/or membership plug-ins to integrate with their CRM with their website.

To turn on/configure this option (for clients using Pages), from the Main Menu, go to your Pages CRM control page:

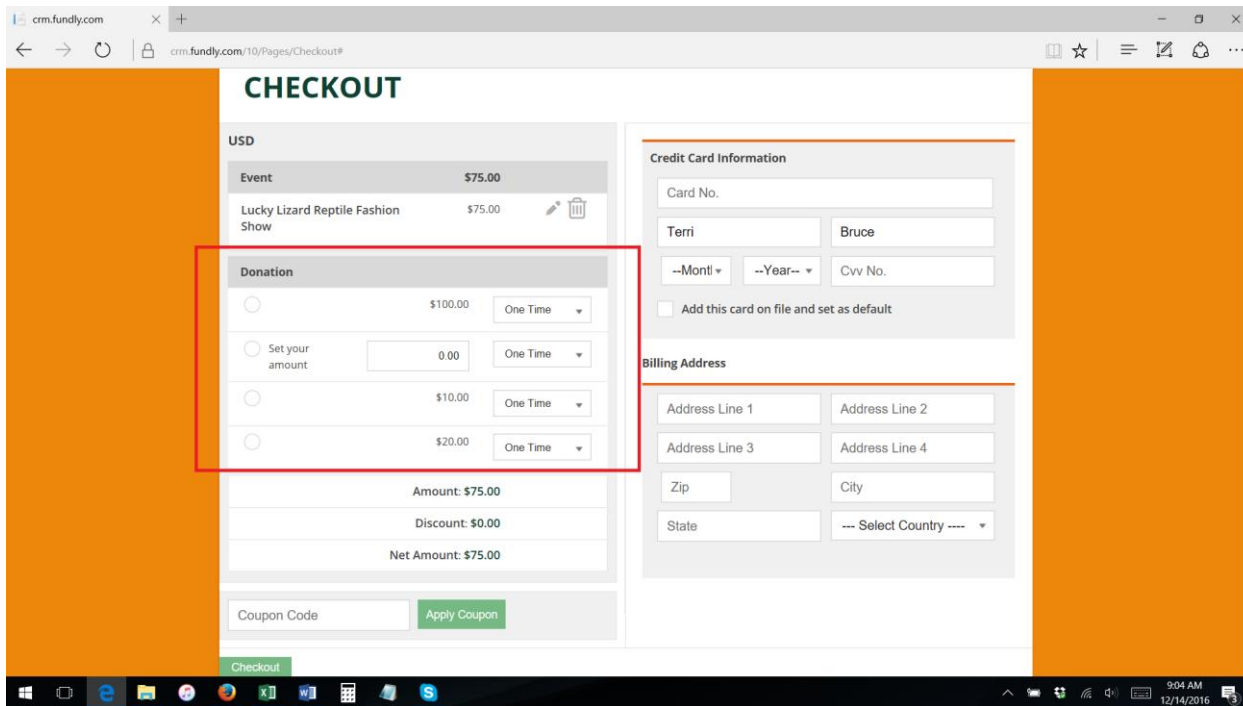


Check the "Donations on Checkout Page" check box. Then select which fund the donations will be linked to and what the donation source will be recorded as. Then select save.





Once configured, users who register for events via your website or who buy or renew a membership will be presented with an option to provide a donation on the last step of the check out process.



**Important Note: The Fund selected MUST have an ask array configured (a one item fixed or text ask array is fine). If there is no Ask Array configured, then the option for the optional donation at check out will NOT display on your website.**

*For information on configuring Ask Arrays, see our tutorial.*

### **Donation Premiums Tutorials & “Year End Thank Yous, Premiums, and Ask Arrays” webinar recording**

While we’re on the subject of donations and Ask Arrays, if you missed our “Year End Thank Yous, Premiums, and Ask Arrays” webinar last week, we’ve added a recording of it to our support library. We’ve also added three tutorials on using the Donation Premiums feature to the Fundraising section of the CRM v2 support library.

[Donation Premiums Part I: Configure Premiums](#)

[Donation Premiums Part II: Configure Premium Rules](#)

[Donation Premiums Part III: Premiums Fulfillment](#)

## Ask Arrays in Donations

With the addition of Ask Arrays to Quick Add Gifts (detailed in our “New Release News – December 7, 2016”), users may have noticed they are not able to add the donation amount to the payment area. Instead, the donation amount must be entered in the Ask Array area and then this information will populate to the payment area. We apologize for not making this change clearer in our last newsletter.

Dashboard Fundly CRM

https://crm.fundly.com/Dashboard/Client#/?

Currency USD

Add Gift Split Gift

**Gift Amount**

Amount Tax Deductible Value

Other

Donation amount needs to be entered in the Gift Amount area and then it will be auto-populated to the "Amount" in the payment information area below.

**Tribute**

None In Memory Of On Behalf Of In Honor Of

Contact Name: Choose Contact

Name:

Mode Of Payment: --Select--

Date Of Payment:

Reference No:

Amount:

This amount information auto-populates from the amount entered in the Gift Amount area above. Users cannot type in this field; it is view only.

Add More Information Save and Add New Save and Close

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## Add Account and Class to Other Items

We've added the ability to add a Chart of Accounts and an Account Class to Invoice Other Items (merchandise sold outside of event registrations). Not only will this allow users to track this revenue with other revenue, this will also allow users to sync these transactions with their online QuickBooks account.

From the Main Menu, select Configurations, and select Custom Data Sets.

File Edit View History Bookmarks Tools Help

Dashboard Fundly CRM

https://cm.fundly.com/Dashboard/Client#/?

Search

- Active Modules
- Integrations
- Add-ons

**Configurations**

- Dashboard
- File Import Processing
- Import Utility
- Financials
- Pages
- Donation Widget
- The Eight Principles
- Fundraising
  - Appeals
  - Batch Gift Entry
  - Batch Pledge Entry
  - Gifts
  - Grants
  - Pledges
  - Premium Fulfillment

**Communications**

- Labels & Letters
- Manage Templates
- Newsletter
- Send Acknowledgements
- Year End Thank You

**Memberships**

- Benefit Fulfillment
- Manage Membership
- Batch Renewal

**Contacts**

- Add Individual
- Add Organization
- Manage Duplicates
- Advanced Search

**Reports**

- Agency Reports
- Default Reports
- Enhanced Reports
- View All

**Events**

- Create Event
- Events
- Quick Ticketing

**Settings**

- Acknowledgment Settings
- Default Salutation
- Invoice Number
- Invoice Setting
- Financial Settings
- Hygiene Rules
- Payment Gateway Settings

Second Year Donor

Lapsed Donor, 1 year

Event Registration

Gift

Top Performing Programs (by donation)

Major Donors

Configure Dashboard

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File Edit View History Bookmarks Tools Help

Fundly CRM

https://cm.fundly.com/Configuration/ViewAll

Search

Currency USD

Tasks +112

**Configurations**

- Contact Information
- Custom Data Sets
- Appeal
- Email Notifications
- Event
- Financials
- Fundraising
- Membership

**Contact Information**

Contact Sources	Contact Types	Donor Categories	Email Types	Employment statuses
Ethnicities	Genders	Housing Statuses	Income Levels	Interaction Types
Marital Statuses	Newsletter Categories	Parenting Statuses	Prefixes	Phone Types
Relationship Types	Saved Searches	Smart Tags	Suffixes	Tags
Stages				

**Custom Data Sets**

Custom Data Sets

**Appeal**

Output Templates	Scanlines	Seeds (Group & Contact)	Transcodes	Report Groups
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**Email Notifications**

All	Event	Financial	Gift	Interaction
Membership	Pledge	System		

**Event**

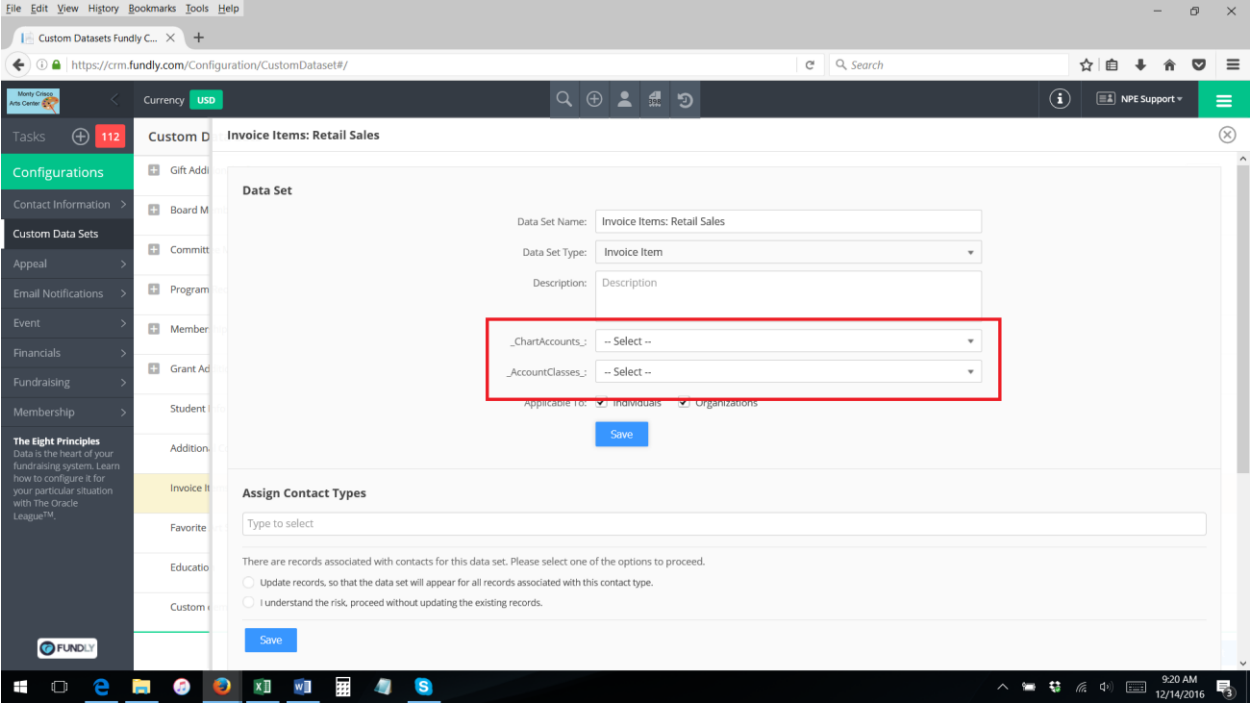
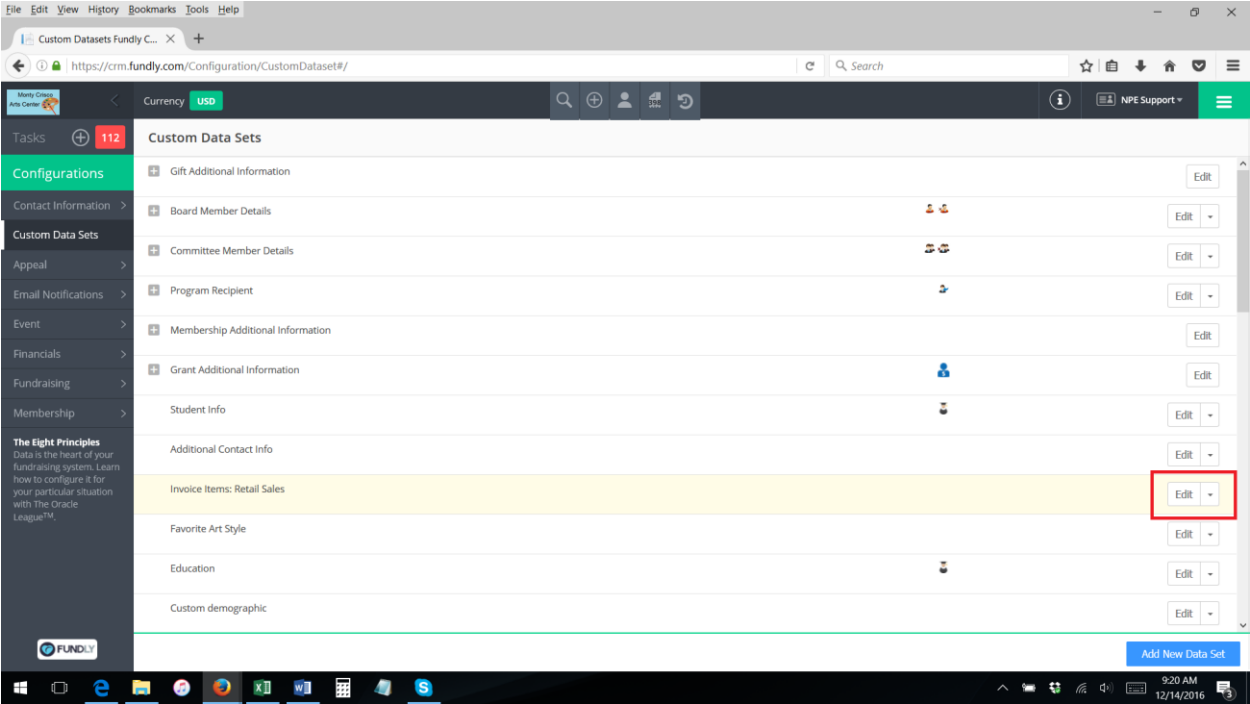
Hosts	Other Items	Registration Types	Search Categories	Venues
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**Financials**

Account Classes	Discount / Promo Code	Chart of Accounts	Expense Groups
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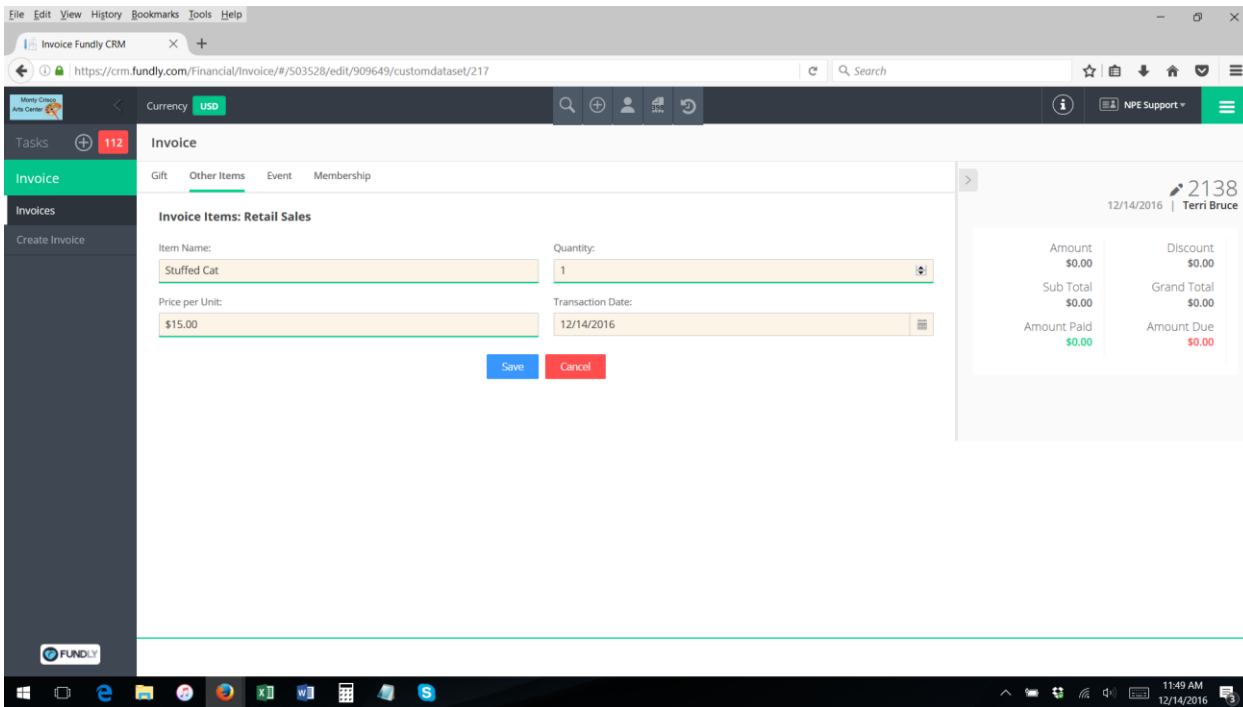
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Users can edit an existing Invoice Other Item Custom Data Set to add the Account and Class, or can add the Account and Class to all new Invoice Other Item data sets that they create.

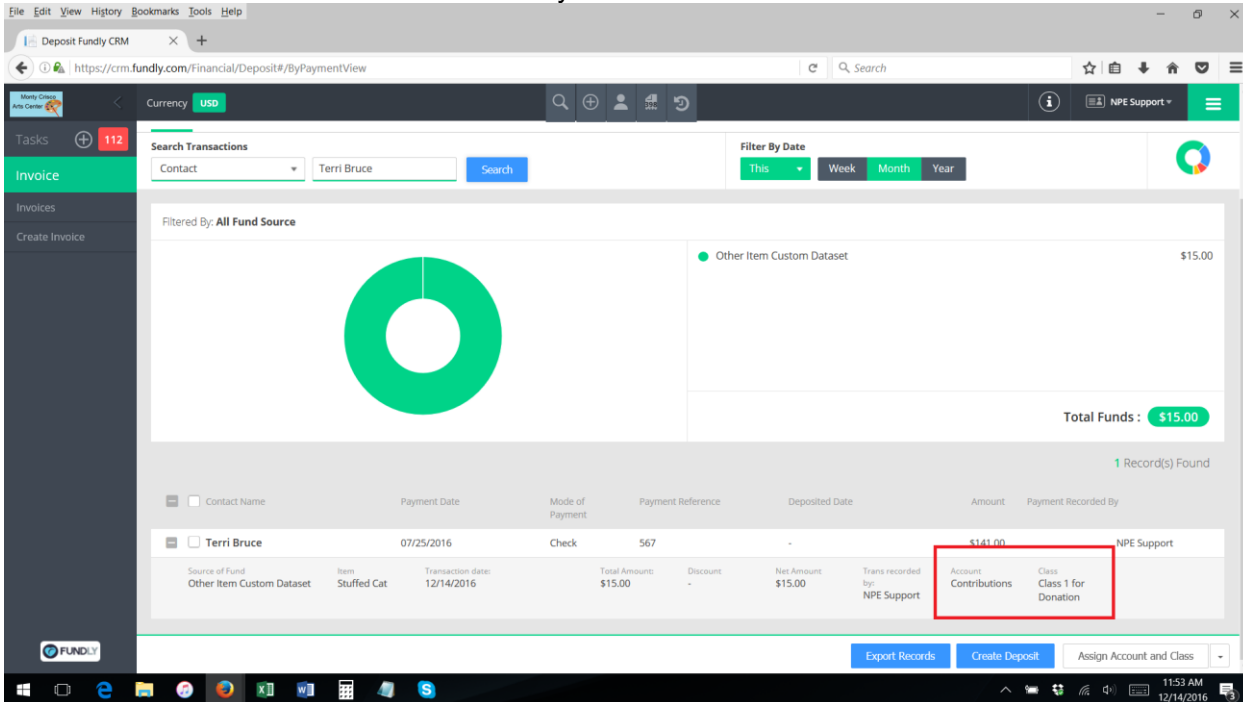




Now, when you record sale of an other item, it will be assigned the account and/or class associated to the Invoice Other Items's custom data set.



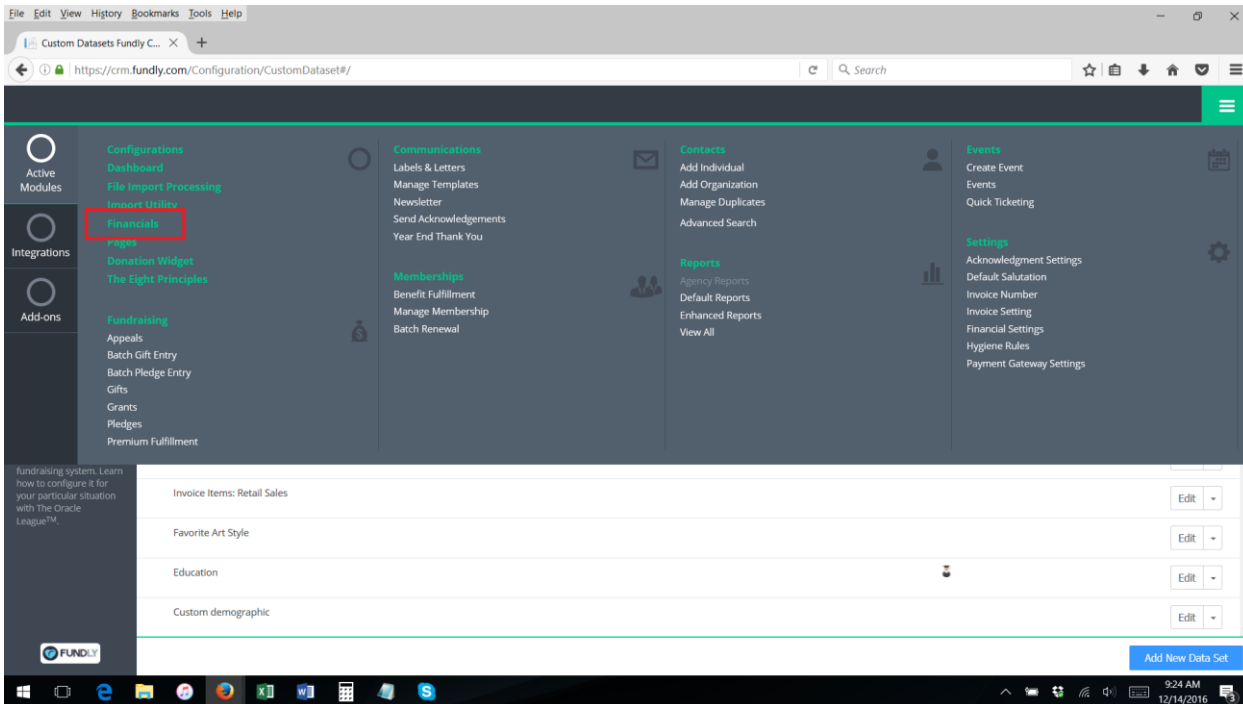
You will be able to see that information on your financials screen.



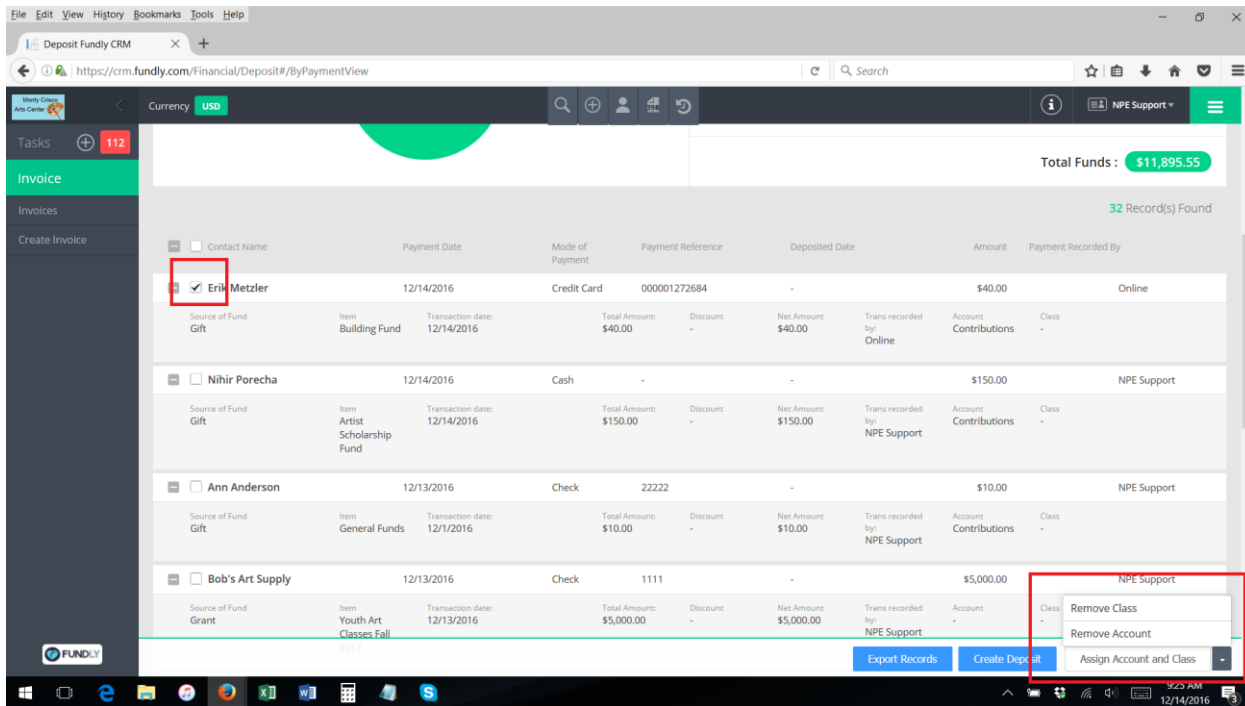
## Ability to Delete Account and Class From Transactions

We have also added the ability to delete Account and/or Class from transactions. Previously, once an account or class had been assigned to a transaction, the user could only change the account or class, but could not remove it completely. Now, users can remove the account and class from the Financials screen.

From the Main Menu, select Financials:



Select the check box next to the transaction(s) whose account or class that you want to remove and select Remove Class or Remove Account from the “Assign Account and Class” button in the lower right hand corner of the screen.



Please Note: for those clients using the QuickBooks sync feature – deleting an account from a transaction that has already synced to QuickBooks will NOT delete that transaction from your QuickBooks account (once the transaction has sync'd, it will have to be manually deleted from within QuickBooks). However, it will break the sync between the CRM transaction and its counter-part in QuickBooks and the QuickBooks transaction will no longer be updated if you update the transaction in the CRM.

Deleting the Account from a transaction prior to the transaction syncing to your QuickBooks account will prevent that transaction from syncing to QuickBooks. HOWEVER, the QuickBooks sync happens in real time and the Account would have to be deleted from the transaction within seconds of the transaction being recorded to keep the transaction from syncing to QuickBooks.

### Display User Role on Users Page

To make administration of your CRM easier, we have added the “role” field to the Users index list in your Account area. Now, you can see what User Role each of your users is assigned directly from the index screen, instead of clicking into the user’s record.

First Name	Last Name	Email	Role	Display Name	User Name	Active
Adriane	Angayan	adriane.angayan@fundly.com	Admin	Adriane	Adriane	✓
Chaitanya	Shah	hardik.pithadiya@nonprofiteasy.net	Volunteer	Chaitanya	chaitanya1	⊘
Darshan	Patel	darshan.patel@nonprofiteasy.net	Admin	Darshan Patel	darshan.patel@nonprofiteasy.net	✓
Dimpal	Dave	dimpal.dave@nonprofiteasy.net	Volunteer	Dimpal Dave	Dimpal	✓
Erik	Metzler	erik.metzler@fundly.com	Admin	Erik	erik	⊘
Jeremy	Paolini	jer.paolini@gmail.com	Admin	JPaolini	Jpaolini	⊘
Lomesh	Shah	lomesh.shah@nonprofiteasy.com	Admin	Lomesh	lshahs01	✓
Missy	Singh	missy.singh@fundly.com	Admin	Missy	montydemo	✓
Missy	Singh	missy.singh@fundly.com	Admin	Missy	MissyFundly	✓

## Duplicate Prevention

Users should be aware that when using email in duplicate prevention settings, the system only checks the email address set as **Primary**; all other email addresses are not checked/ignored by the duplicate prevention settings. This means that, when using email in duplicate prevention settings, the existing record must have the same email address as the 2<sup>nd</sup> record being added AND that existing record's matching email address must be marked as the contact's primary email for the system to prevent a duplicate from being created (assuming all of the other fields selected for duplicate prevention match exactly as well).

We've added some additional detail and examples/scenarios to our Manage Duplicates: Prevent Duplicates tutorial (<https://support.fundly.com/hc/en-us/articles/206316317-Manage-Duplicates-Prevent-Duplicates-Version-2->) in our support library to help users trouble shoot their duplicate prevention settings that details this information as well as other frequent issues/questions regarding duplicate prevention.

## Weekly Reporting Huddle

And lastly, just a reminder that we offer a 15-minute demo of some feature within the reporting module every Monday during the Reporting Huddle. Even if you don't have a specific reporting question, we encourage you to attend at least the demo as many of the lesser known – but extremely powerful – features of the reporting module are highlighted during this time. The Reporting Huddle does require pre-registration, which can be done at [www.fundlyevent.com](http://www.fundlyevent.com). This Monday, we'll cover using the "Month" and "Month Name" functions to pull out the month part of a date (helpful for grouping and displaying report results by month rather than by discrete dates).

## Organizational Approval/Joining Date Filter

Never worry about communicating with your recent organizations again, because now we have a new filter which is the organization 'Joining Date'!

Joining Date refers to the date of Approval for organization. You can now select this field as a filter criteria in both the newsletter area and in the volunteer advanced search.

## Newsletter:

Address 1  
Address 2  
Address 3  
Address 4  
City  
Country  
Country  
EIN  
Email  
Full Name  
Job Title  
**Joining Date**  
Organization Type  
Phone  
PrimaryContactName  
State  
Status  
Organization Preference  
Campaign

Joining Date  
---Select Operator---

Match: All of the following rules:

← BACK SAVE AND PROCEED

## Volunteer Advanced Search:

---Select Criteria---

Organization Info  
Address 1  
Address 2  
Address 3  
Address 4  
City  
Country  
Country  
EIN  
Email  
Full Name  
Job Title  
**Joining Date**  
Organization Type  
Phone  
PrimaryContactName  
State  
Status  
Organization Preference  
Campaign

---Select Criteria---

Save

We are committed to ensuring a great user experience with our products and services and are continually striving to ensure our products meet the evolving needs of our customers. As always, we offer a variety of support options, including a tutorial library, daily webinars ([fundlyevent.com](http://fundlyevent.com)), live help drop in sessions, and email support ([support@fundly.com](mailto:support@fundly.com)).

If you'd like to suggest a webinar or training topic, submit it at [fundlyevent.com](http://fundlyevent.com) (there's a link at the top of the page).