Contacts: Stage of Development Part II – Add/Edit Contact Stage of Development

- The Stage of Development module allows users to track a contact's flow through a lead development pipeline. For example, this module could be used to track the development of donors from a prospect through various relationship stages to donor, or a potential client from a lead to a closed deal/sale.
- Before the stage of development can be added to a contact record, they stages must first be configured on the Configurations menu (see the "<u>Stage of Development Part I – Configure Stage</u> <u>of Development</u>" tutorial).
- 3. To add a stage of development to a contact's record, view the contact record.
- 4. Scroll down to the Stage of Development module (you may have to first turn this module on under the contact layout configuration [blue button in the lower right hand corner of the view contact screen]).

(1) A https://crm.f	undly.com/ContactManage	ement/Individual/De	tails/#/view/536772/fc9cf433-2	8c8-4cb9-ac80-bf2457	/d31395		C Q Search		☆ 自 ♣	ô C
°≊ = ,,,	Currency USD			Q 🕀 🛓			1.0		(i) III NPE Suppo	
	Currency 030	_			*** 3					
s 🕀 ╹			No records found.							
	Stage of Development				a. 2	Invoice Items: Re	tail Sales			
	Select Stage	▼ Note	Change			Item Name	Quantity	Price per Unit	Transaction Date	
	Stage Of Development	Start Date	End Date	Interaction Count						
	🗄 Warm Lead	01/06/2017		2 \$						
	Soft Credits				۹ 🛃	Gifted Membersh	nips			
FUNDLY	Start Date	End Date	sounds Q	Filter		Namo	Momborchin Loval	Dedictration	Amount Docoluod/Drico	

5. On the Stage of Development module, you will see any stages that have previously been added to the contact's record and you will see a count of interactions that occurred with the contact while the contact was in each stage of development.

) 🛈 🖴 https://crm.	fundly.com/ContactManagement/Ind	ividual/Details/#/view/536772/fc9cf433-2	28c8-4cb9-ac80-bf2457d31395		C Q, Search		☆自♣	î ♥
try Crisco			Q 🕀 L 🛃 🄊			(i III NPE Suppor	t~ =
sks 🕀 💿		No records found.						
ntacts								
Individual								
	Stage of Development		ш. 2	Invoice Items: Retail S	ales			
	Select Stage Vol	Change		Item Name	Quantity	Price per Unit	Transaction Date	
	Stage Of Start D Development	ate End Date	Interaction Count					
	Warm Lead 01/06/	- 2017	2 \$					
	Soft Credits		Q "*	Gifted Memberships				
FUNDLY	Start Date End C	Date 📄 Search 🔍	Filter			Data Edit Contact	Layout Configuration	Actions

6. Clicking the "+" next to any recorded stage will display notes that were entered when that stage of development was added to the contact's record.

<u>File Edit View History</u>	<u>B</u> ookmarks <u>T</u> ools <u>H</u> elp								- 0	\times
View Contact Details	Fund × 🖭 Contacts: St	age of Develo $ imes$	+							
← 🕀 🖨 https://crm.f	fundly.com/ContactManag	ement/Individual/D	etails/#/view/536772/fc9cf433-	28c8-4cb9-ac80-bf2457d31395		🔋 🔍 Search		☆自 ♣	î 🗸	≡
Monty Crisco Arts Center				Q 🕀 🛓 🚮 😒	>		(i	NPE Support	rt =	≡ ^
Tasks 🕀 🚺			No records found.							
Contacts										
Add Individual										
Add Organization										
Manage Duplicates										
Advanced Search	Stage of Development			alt, e	Invoice Items: Retail S	iles				2
	Select Stage	▼ Note	Change		item Name	Quantity	Price per Unit	Transaction Date		П
	Stage Of Development	Start Date	End Date	Interaction Count						
	🗄 🛛 Warm Lead	01/06/2017		2 💠						
	Soft Credits			Q L [#]	Gifted Memberships					2
		-			Namo	oborchin Louol	Dogistration Amor	unt Received (Drice		
FUNDLY	Start Date						Edit Contact	Layout Configuration	Actions	; •
= o e	a 📀 😜 🛙	(] w]	4 8				~ 10	💱 <i>(i</i> r. d») 📰	10:46 AM 1/9/2017	2

Eile Edit View History	Bookmarks Tools Help Fund X 2 Contacts: Stage of Develo	v 1					-	đ	×
	fundly.com/ContactManagement/Individe		c8-4cb9-ac80-bf2457d31395	c	Q. Search		☆自♣	^ ⊽	=
Monty Crisco Arts Center			Q 🕀 🛓 🛃 🤊			í	E NPE Support		^
Tasks 🕀 💿		No records found.							
Contacts									
Add Individual									
Add Organization									
Manage Duplicates									
Advanced Search	Stage of Development		at. 🖉	Invoice Items: Retail Sal	es				2.1
	Select Stage Note	Change		Item Name	Quantity	Price per Unit	Transaction Date		1
	Stage Of Start Date Development	End Date	Interaction Count						
	Warm Lead 01/06/201	7 -	2 \$						
	Soft Credits		Q 2 ⁸ 2	Gifted Memberships					2
	Start Date 🗮 End Date	= Search Q	Fite	Nama Mam	borchip Louol	Registration Amount	Received/Drice		
FUNDLY						Edit Contact	yout Configuration	Actions	•
# 🗆 🤤	🥫 🥝 🔕 🔝 🗐	III 🥼 😒				~ 10 ₩		10:45 AM 1/9/2017	2

7. Hovering over the Interaction Count for any stage will reveal the details of the interactions that have taken place while that contact was at that stage of development.

	Indly.com/ContactManagen	nent/Individual/Detail	;/#/view/536772/fc9cf433-28	c8-4cb9-ac80-bf2457d	31395		C Q Search		☆自●	a C	2
nty Crisco Center 🧒	Currency USD			۹ 🕀 🛓						ort≖	=
isks 🕀 🚺		No	records found.								
ntacts											
l Individual											
Organization											
nage Duplicates											
vanced Search	Stage of Development			ան	1. A. A.	Invoice Items: Re	tail Sales				2
	Select Stage	• Note	Change			Item Name	Quantity	Price per Unit	Transaction Date		
	Stage Of Development	Start Date	End Date	Interaction Count							
	Warm Lead	01/06/2017		2 🔶 -	Туре		Interaction				
	Note : met Terri today				Phone		1				
					In-Person		1				
	Soft Credits			۹	2	Gifted Membersh	nips				2

8. To add a new stage of development to the contact's record, click on the "Select Stage" drop down menu.

<u>File Edit View History</u>	<u>B</u> ookmarks <u>T</u> ools <u>H</u> elp								- 6	× ×
View Contact Details	Fund X 🖭 Contacts: Sta	ge of Develo $ imes $ -	F							
	fundly.com/ContactManage	ment/Individual/Det	ails/#/view/536772/fc9cf433-28	c8-4cb9-ac80-bf2457d31395	c	Q, Search		☆自◆	^	
Monty Crisco Arts Center 👯				৭ ⊕ 💄 🛃 ত			í)	rt≖	≡ ^
Tasks 🕀 💿			No records found.							
Contacts										
Add Individual										
Add Organization										
Manage Duplicates										
Advanced Search	Stage of Development			<u>it</u> 2 ⁸	Invoice Items: Retail Sa	es				2
	Select Stage	▼ Note	Change		Item Name	Quantity	Price per Unit	Transaction Date		
	Stage Of Development	Start Date	End Date	Interaction Count						
	Warm Lead	01/06/2017		2 \$						
	Soft Credits			Q * *	Gifted Memberships					$ \mathcal{C} $
	Start Date 1	End Date	= search Q	Filter	Namo Mon	borchip Lovel	Degistration Amou	nt Received (Drice		_
FUNDLY							Edit Contact	Layout Configuration	Action	~
= 🗆 🤤	🚍 📀 😫 🗵	w 🛛	4 5				~ m 4	i (i dv) 🚃	10:47 AN 1/9/2017	

9. Select the desired stage.

<u>File Edit View History</u>	Bookmarks Tools Help						-	Ø	×
I View Contact Details	Fund × 🖭 Contacts: Stage of Develo ×	+							
🗲 🕃 🖴 https://crm.	fundly.com/ContactManagement/Individual	/Details/#/view/536772/fc9cf433-28c8	3-4cb9-ac80-bf2457d31395	c	Q, Search		☆自 ♣	^ ▽	≡
Monty Crisco Arts Center 💏			৭ ⊕ ≗ ≝ ৩			í) 💷 NPE Support	•	Ŷ
Tasks 🕀 🛛		No records found.							
Contacts									
Add Individual									
Add Organization									
Manage Duplicates									
Advanced Search	Stage of Development		a 2	Invoice Items: Retail Sal	es			1	1.
	-Select Stage- Warm Lead Past Donor Rekindle Hot Lead Donor Dead End Vote Note Start Date 01/06/2017	End Date	Interaction Count	Rem Name	Quantity	Price per Unit	Transaction Date		
FUNDLY	Soft Credits	a (see the 0 ,))	Q 2	Gifted Memberships	berchie Louel	Desistration Amou Data Edit Contact	unt Decoluted Brise Layout Configuration	Actions •	2
= 🗆 🤤	🚍 🥝 🧕 💷 📰	4 🧕				~ = :		0:48 AM 1/9/2017	2

10. Add a note (required), such as why the contact is being marked as being at this stage, the staff person making the change, etc.

🗄 🗊 🖴 https://crm.fundly.com/Contac	tManagement/Individual/Detail:	s/#/view/536772/fc9cf433-28	c8-4cb9-ac80-bf2457d31395		C Q Search		☆自♣	î ♥
Konty Crisso Center 💑 🤇 Currency USD			Q 🕀 🛓 🖪 🖞	0			(i) EL NPE Support	
asks 🕀 💶	No	records found.						
ontacts								
d Individual								
d Organization								
anage Duplicates								
vanced Search Stage of Devel	opment		<u>ш</u>	Invoice Items: Reta	il Sales			
Hot Lead	Terri expressed ir			item Name	Quantity	Price per Unit	Transaction Date	
Stage Of Developm	Start Date	End Date	Interaction Count					
Warm Lea	d 01/06/2017		2 ¢					
Soft Credits			۹ پ	Gifted Membership	15			

11. Click "change." The stage of development is now recorded on the contact's record (it may take a second or two for the contact page to refresh and show the stage of development).

) U 🗖 https://crm	.fundly.com/ContactManagement,	/Individual/Details/#/vi	ew/536772/fc9cf433-28ct	3-4cb9-ac80-bf	2457d31395		c	Q, Search			☆自	∔ ^	◙
y Crisco ter 🧒 <				Q, 🕀	2 5	ગ				í	💷 NPE S	upport =	
ks 🕀 🗖		No recor	ds found.										
tacts													
ndividual													
	Stage of Development				<u>a</u> 2	Invoice	Items: Retail Sal	es					
	Select Stage 🔻	Note	Change			Item Nan	ne	Quantity	Price per Unit		Transaction Da	ite	
	Stage Of St Development	tart Date	End Date	Interaction C	Count								
	Hot Lead 0	1/09/2017		0	¢								
	🗄 Warm Lead 0	1/06/2017	01/09/2017	2	¢								
	Soft Credits				Q 2'	Gifted	Memberships				_		

12. The system will automatically enter an end date for the previous stage as the date you change the contact to a new stage. You cannot back date stage of development changes; the system

will automatically assign the date you add a new stage as the end date for the previous stage and the start date of the current stage.

<u>File Edit View History</u>	Bookmarks Tools Help							-	ð ×
View Contact Details	Fund × 🖭 Contacts: Stage	e of Develo $ imes \mid$ –							
🗲 🕄 🖴 https://crm.	.fundly.com/ContactManager	nent/Individual/Deta	ils/#/view/536772/fc9cf433-28c	8-4cb9-ac80-bf2457d31395		C Q. Search		☆ 自 ♣ ⋒	
Monty Crisco Arts Center				Q 🕀 ᆂ 👯 ੲ			í	NPE Support *	≡
Tasks 🕀 💿		1	lo records found.						
Contacts									
Add Individual									
Add Organization									
Manage Duplicates									
Advanced Search	Stage of Development			<u>н</u> 2 ⁸	Invoice Items: Retail S	ales			2
	Select Stage	Note	Change		Item Name	Quantity	Price per Unit	Transaction Date	
	Stage Of Development	Start Date	End Date	Interaction Count					
	🗄 Hot Lead	01/09/2017	·	0 \$					
	🛃 Warm Lead	01/06/2017	01/09/2017	2 \$					
	Soft Credits			Q .*	Gifted Memberships				2
		1			New York		Desistantian	Deschard Point	
FUNDLY	Start Date	End Date	≣ search — Q.	Filter	- Mo	uusar Dio Louol	Date Edit Contact L	ayout Configuration	Actions 👻
🗉 🖸 🤤	📄 🦪 횓 🗵	W	4 3				∧ ₩ 4		49 AM 9/2017

13. The system will now keep track of the number of interactions recorded (in the tasks & interactions module) with this contact, while the contact is at this stage of development. This count will show in the Interaction Count column. This allows user to keep track of how much effort (how many interactions) it took to move the contact to the next stage of development.

	actManagement/Individua	l/Details/#/view/536772/fc9cf433-2	8c8-4cb9-ac80-bf2457d31395		C Q, Search		☆ 自 ♣ 1	
wity Crisco zerow	2		Q 🕀 🛓 🛃 🤊				i III NPE Support	
sks 🕀 💶		No records found.						
ntacts								
d Individual								
Organization								
nage Duplicates								
vanced Search Stage of De	velopment		л. г	Invoice Items: Ret	ail Sales			
Select S	age 🔻 Note	Change		Item Name	Quantity	Price per Unit	Transaction Date	
E Stage O		End Date	Interaction Count					
🖸 Hot Le	ad 01/09/2017		Ο φ					
🗈 Warm	Lead 01/06/2017	01/09/2017	2 \$					
Soft Credit:			۵.	Gifted Membersh	ips			2
					<u> </u>			

- 14. To change/update the contact's stage of development, simply repeat steps #9 & #10 above.
- 15. You can set a contact back to an earlier stage of development by selecting that stage from the list, adding a note, and clicking "change."

🛛 🛈 🖴 https://crm.f	undly.com/ContactManage	ment/Individual/Detai	ls/#/view/536772/fc9cf433-28	c8-4cb9-ac80-bf2457d31395		C Q Search		☆ 自	∔ ≙	
nty Crisco Jenter 🧽 🧹				Q 🕀 🛓 🚮 🤊					upport =	
ısks 🕀 💿		N	o records found.							
ntacts										
Individual										
	Stage of Development			×v ∦t	Invoice Items: Retai	il Sales				1
	Warm Lead	• Note	Change		Item Name	Quantity	Price per Unit	Transaction D	ate	
	Stage Of Development	Start Date	End Date	Interaction Count						
	Hot Lead	01/09/2017		0 \$						
	Warm Lead	01/06/2017	01/09/2017	2 \$						
	Soft Credits			م 2*	Gifted Membership	s				é

<u>File Edit View History B</u>								-	- 0	×
	Fund × Contacts: Sta		# h : # 2 C 7 7 2 M-D - = 4 2 2 - 20	3c8-4cb9-ac80-bf2457d31395		C Q Search		☆自◆	^ ♡	=
Manta Crista		ement/individual/Details/	#/view/536/72/10901455-20			C Search				= ^
Arts Center 😵	Currency USD			ର୍ 🕀 ᆂ 🔩 ୭				i EL NPE Suppor	t* ≡	
Tasks 🕀 🛛		Nor	ecords found.							
Contacts										
Add Individual										
Add Organization										
Manage Duplicates										
Advanced Search	Stage of Development			at. 🖉	Invoice Items: Re	tail Sales			2	L.
	Warm Lead	▼ Terri can't donate r	ight now Change		Item Name	Quantity	Price per Unit	Transaction Date		1
	Stage Of Development	Start Date	End Date	Interaction Count						l
	Hot Lead	01/09/2017		Ο φ						
	🗄 Warm Lead	01/06/2017	01/09/2017	2 \$						
	Soft Credits			Q 🖉	Gifted Membersl	hips			2	
					Name	Mambarthia Lavel	Desistration	Amount Desclued Orice		
FUNDLY	Start Date	E End Date	Search Q	Filter			Edit Contact	Layout Configuration	Actions 🔻	Ī.,
	= 🔗 😜 🗴	1 🗊 🖬 🥼	S				~ 1		10:59 AM 1/9/2017	a)
									13/2011	9
<u>File Edit View History B</u>	ookmarks <u>T</u> ools <u>H</u> elp							-	- 0	×
View Contact Details F	Fund X 🙎 Contacts: Sta	age of Develo $ imes $ +								
← 🕃 🔒 https://crm.fr	fundly.com/ContactManag	ement/Individual/Details/	#/view/536772/fc9cf433-28	3c8-4cb9-ac80-bf2457d31395		C Q Search		☆自◆	î ♥	=
Arts Center 🗬				२ 🕀 💄 歸 ञ				INPE Support	t* ≡	î
Tasks 🕀 💿		Nor	ecords found.							
Contacts										
Add Individual										
Add Organization										
Manage Duplicates										
Advanced Search	Stage of Development			at 🖉	Invoice Items: Re	tail Sales			2	1.
	Select Stage	▼ Note	Change	<u>III.</u> 2	Item Name	Quantity	Price per Unit	Transaction Date	¥.	1
	Stage Of Development	Start Date	End Date	Interaction Count						e.
	Warm Lead	01/09/2017	-	0 \$						
	Hot Lead	01/09/2017	01/09/2017	0 \$						
	🗄 🛛 Warm Lead	01/06/2017	01/09/2017	2 ¢						
	Soft Credits			Q 2ª	Gifted Membersl	hips			2	
					News					1
		End Date			AL MILLO	Momborchin Louol	Dedictration	Amount Received (Brice		
FUNDLY	Start Date	End Date	Search Q	File		Momborchin Lovel	Edit Contact	Amount Received Orice Layout Configuration	Actions 👻	~

- 16. You cannot delete a stage of development; once added, it will be a permanent part of the contact's record.
- 17. To see a graphical representation of the contact's stage of development history including the count of interactions at each stage click on the graph icon. The exact shape of the graph will depend on the number of interactions that took place at each stage of development.

	× 🧟 Contacts: Stag								
		nent/Individual/Details/	#/view/536772/fc9cf433-2i	8c8-4cb9-ac80-bf2457d31395		C Q Search		☆ 自 ↓	
	rency USD			२ ⊕ ≗ ∰ इ	9			i 💷 NPE Suppo	ort =
⊕ ○		Nor	ecords found.						
ts									
vidual									
anization Duplicates									
d Search									
St	tage of Development	14		м <u>ч</u>	Invoice Items: Re				
111	Select Stage	• Note	Change		Item Name	Quantity	Price per Unit	Transaction Date	
	Stage Of Development	Start Date	End Date	Interaction Count					
	Warm Lead	01/09/2017		0 ¢					
0	Hot Lead	01/09/2017	01/09/2017	0 \$					
0	Warm Lead	01/06/2017	01/09/2017	2 ¢					
Sc	oft Credits			<i>م</i> 💒	Gifted Membersh	iips			
	tart Date	End Date	🖬 Search 🔍	Filter	Namo	Momborship Loval	Desictration	Amount Received (Brice	
FUNDLY							Edit Contact	Layout Configuration	Acti
D 🔁 📃	<i>📀</i> 😰 🗵	🐑 🔢 🥠	<u>S</u>				/ ^ ·	🖦 👯 🌾 ርሳ) 🚃	11:01 A 1/9/201
	<i>i</i> 🥹 🗴	<u>v</u> III 4	<u>s</u>						11:01 A 1/9/201
<u>V</u> iew History <u>B</u> ookma	irks <u>T</u> ools <u>H</u> elp		<u>S</u>		-	-	~ 1		1/9/20
<u>V</u> iew Higtory <u>B</u> ookma w Contact Details Fund	rks <u>T</u> ools <u>H</u> elp × ♀ Contacts: Stag	e of Develo × +		2c9 4c60 xc90 bt1457d31306		a O Sauch	<u>^</u>	🛍 🤩 🦟 dı) 🧫	1/9/20 ⁻
View Higtory Bookma v Contact Details Fund https://crm.fundly.	rrks Tools Help × © Contacts: Stag com/ContactManager	e of Develo × +		8x8-4cb9-ac80-bf2457d31395		C Q Search	~ '	•• \$ <i>《</i> d) == ☆ 自 ♣	1/9/20 -
View Higtory Bookma v Contact Details Fund https://crm.fundly.	rks <u>T</u> ools <u>H</u> elp × ♀ Contacts: Stag	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-2i	3c8-4cb9-ac80-bf2457d31395 ♀ ⊕ ≗ ∰ :	0	C Q Search	^	🛍 🤩 🦟 dı) 🧫	1/9/20 -
View History Bookma or Contact Details Fund https://crm.fundly Curr Curr 0	rrks Tools Help × © Contacts: Stag com/ContactManager	e of Develo × + ment/Individual/Details/			0	C Q Search		•• \$ <i>《</i> d) == ☆ 自 ♣	1/9/20 -
View Higtory Bookma « Contact Details Fund https://crm.fundly. Curr 0 ts	rrks Tools Help × © Contacts: Stag com/ContactManager	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-2i		0	∣ ⊄ ∥ Q, Search		•• \$ <i>《</i> d) == ☆ 自 ♣	1/9/20 -
View Higtory Bookma v Contact Details Fund https://cmr.fundly. Curr 0 Curr 15 Vidual	rrks Tools Help × © Contacts: Stag com/ContactManager	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-2i		0	C Q Search		•• \$ <i>《</i> d) == ☆ 自 ♣	1/9/20 -
View Higtory Bookma v Contact Details Fund https://cmr.fundly.v Curr 0 Curr 0 15 vidual anization	rrks Tools Help × © Contacts: Stag com/ContactManager	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-2i		9	C Q, Search		•• \$ <i>《</i> d) == ☆ 自 ♣	1/9/201
View Higtory Bookma v Contact Details Fund https://cmr.fundly.u Curr to vidual anization Duplicates	rrks Tools Help × © Contacts: Stag com/ContactManager	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-2i		•	C Q, Search		•• \$ <i>《</i> d) == ☆ 自 ♣	1/9/201
View Higtory Bookma w Contact Details Fund https://crm.fundly Curr 0 Curr 0 15 15 15 15 15 15 15 15 15 15	rrks Tools Help × © Contacts: Stag com/ContactManager	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-2i		D Invoice Items: Ret		^	•• \$ <i>《</i> d) == ☆ 自 ♣	1/9/201
View Higtory Bookma w Contact Details Fund https://crm.fundly Curr 0 Curr 0 15 15 15 15 15 15 15 15 15 15	riks Jools Help X Contacts Stag com/ContactManager ency USO	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-2i	Q ⊕ ≗ ₫ :			Price per Unit	•• \$ <i>《</i> d) == ☆ 自 ♣	1/9/201
View Higtory Bookma w Contact Details Fund https://crm.fundly Curr 0 Curr 0 15 15 15 15 15 15 15 15 15 15	riks Jools Help X Contacts Stag com/ContactManager ency USO	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-2i	Q ⊕ ≗ ₫ :	Invoice Items: Ret	tail Sales		₩D \$3 /// 40) [== ☆ 自 ◆	1/9/20 -
View Higtory Bookma w Contact Details Fund https://crm.fundly Curr 0 Curr 0 15 15 15 15 15 15 15 15 15 15	riks Jools Help X Contacts Stag com/ContactManager ency USO	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-2i	Q ⊕ ≗ ₫ :	Invoice Items: Ret	tail Sales		₩D \$3 /// 40) [== ☆ 自 ◆ (3) [E3] NPE Support	1/9/20 -
View Higtory Bookma w Contact Details Fund https://crm.fundly Curr 0 Curr 0 15 15 15 15 15 15 15 15 15 15	riks Jools Help X Contacts Stag com/ContactManager ency USO	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-2i	Q ⊕ ≗ ₫ :	Invoice Items: Ret	tail Sales		₩D \$3 /// 40) [== ☆ 自 ◆ (3) [E3] NPE Support	1/9/20 -
View Higtory Bookma w Contact Details Fund https://crm.fundly Curr 0 Curr 0 15 15 15 15 15 15 15 15 15 15	riks Jools Help X Contacts Stag com/ContactManager ency USO	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-24	Q ⊕ ≗ ₫ :	Invoice Items: Ret	tail Sales		₩D \$3 /// 40) [== ☆ 自 ◆ (3) [E3] NPE Support	1/9/20 -
View Higtory Bookma w Contact Details Fund https://crm.fundly Curr 0 Curr 0 15 15 15 15 15 15 15 15 15 15	rks Jools Hep X Contacts Stag com/ContactManager ency USO	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-24	Q ⊕ ≗ ₫ :	Invoice Items: Ret	tail Sales		₩D \$3 /// 40) [== ☆ 自 ◆ (3) [E3] NPE Support	1/9/20 -
View Higtory Bookma w Contact Details Fund https://crm.fundly Curr 0 Curr 0 15 15 15 15 15 15 15 15 15 15	rks Jools Hep X Contacts Stag com/ContactManager ency USO	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-24	Q ⊕ ≗ ₫ :	Invoice Items: Ret	tail Sales		₩D \$3 /// 40) [== ☆ 自 ◆ (3) [E3] NPE Support	1/9/20 -
View Higtory Bookma w Contact Details Fund https://crm.fundly Curr 0 Curr 0 15 15 15 15 15 15 15 15 15 15	rks Jools Hep X Contacts Stag com/ContactManager ency USO	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-20 ecords found.	Q ⊕ ≗ ₫ :	Invoice Items: Ret	tail Sales		₩D \$3 /// 40) [== ☆ 自 ◆ (3) [E3] NPE Support	1/9/20 -
View Higtory Bookma v Contact Details Fund https://cmr.fundly.u Corr 0 0 0 15 v/dual anization Duplicates d Search	rks Jools Hep X Contacts Stag com/ContactManager ency USO	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-20 ecords found.	Q ⊕ ≗ ₫ :	Invoice Items: Ret	tail Sales Quartity		₩D \$3 /// 40) [== ☆ 自 ◆ (3) [E3] NPE Support	1/9/201
View Higtory Bookma v Contact Details Fund https://cmr.fundly.u Corr 0 0 0 15 v/dual anization Duplicates d Search	ris Joos Hep X Contact: Stag com/ContactManager ency USD	e of Develo × + ment/Individual/Details/	#/view/536772/fc9cf433-20 ecords found.	Q	Invoice Items: Re Rem Name	tail Sales Quartity		₩D \$3 /// 40) [== ☆ 自 ◆ (3) [E3] NPE Support	sat.

18. To switch from the graphical view back to the data view, simply click the data view (tree) icon.

Eile Edit View Higtory Bookmarks Iools Help -								
	fundix × (Contacts sage of Develor ×) + fundix.com/ContactManagement/Individual/Details/#/view/536772/fc9cf433-28c8-4	cb9-ac80-bf2457d31395	C	Search	☆ 自 ♣ 斋 ♥ ☰			
Monty Crisco Artis Center	Currency USD	Q 🕀 🛓 🛃 🖠	ອ		i 💷 NPE Support * 😑 ^			
Tasks 🕀 💿	No records found.							
Contacts								
Add Individual								
Add Organization								
Manage Duplicates								
Advanced Search	Stage of Development	o .	Invoice Items: Retail Sales		2			
	- Wern Leed (2) Hot Leed (9)		item Name C	Quantity Price per Unit	Transaction Date			
	Soft Credits	٩ ۴	Gifted Memberships		1			
FUNDLY	Sun Dutu 🖀 End Dutu 🕿 Sundi Q. F	ile	Nama Momber	chin Loval Dedictration A Data Edit Contact	Layout Configuration Actions V			
e 🛛 🗧	= 0 0 🕺 💷 🖩 🦉 🧕			/ ^ *	(주 다) 11:01 AM 1/9/2017			