Great New Things From Fundly CRM & Fundly Connect...

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:

- New Event Ticket Template
- Changes to Duplicate Prevention Settings
- Changes to Quick Search
- Changes to the Import Utility

Connect:

- New "Next Step" Statuses
- Scheduling Enhancement
- Team Feature Enhancements

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)

With the release of a new build, users may experience some irregularities in their CRM or Connect account such as the appearance of strange code, blank screens/modules, lack of word wrapping, etc. These issues are related to the need to clear your browser cache and/or to log out and back in to the system in order to get the new updates. If you continue to experience difficulties after clearing your cache and re-logging in, please email us at support@fundly.com.

Still Using Version 1 of Fundly CRM?
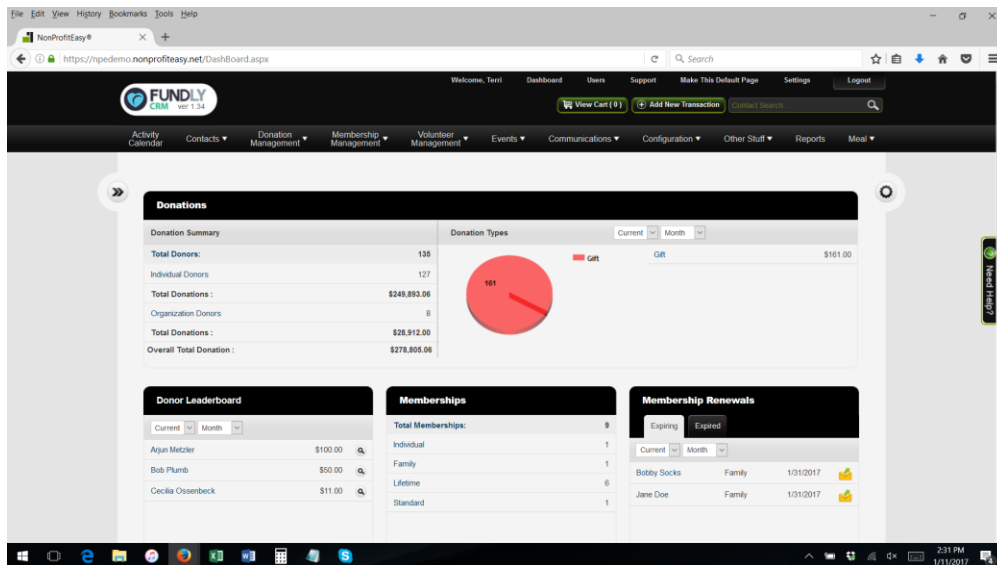
## Start the new year off right - by upgrading to Fundly CRM version 2!
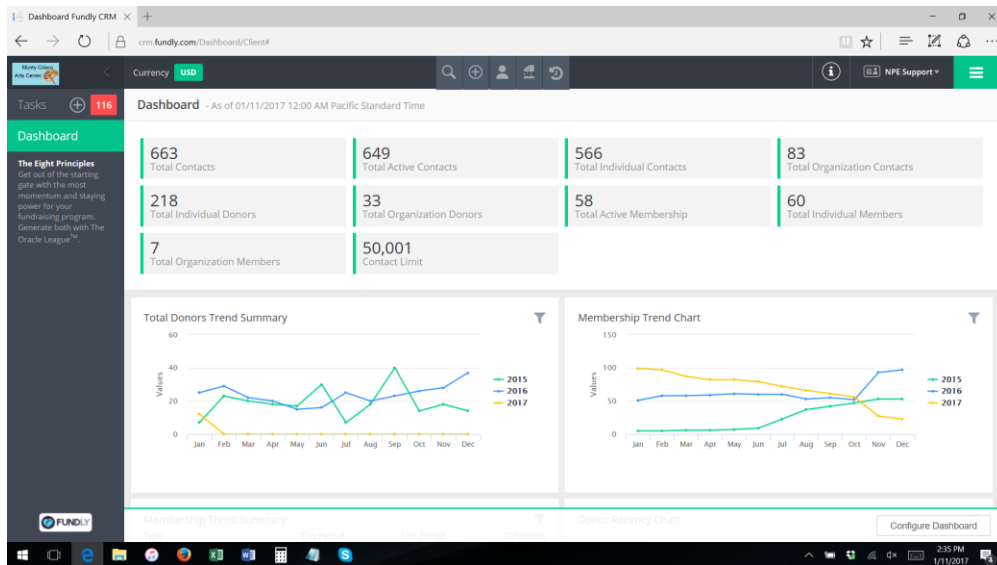
If you're still using Version 1 of Fundly CRM, we encourage you to check out all the great features that Version 2 offers. We hold a "Getting Started w/Fundly CRM v2" webinar every Monday at 11:00 am PST that provides an overview of all that the new version of Fundly CRM has to offer. For more information, or to discuss upgrading to v2, contact implementation@fundly.com.
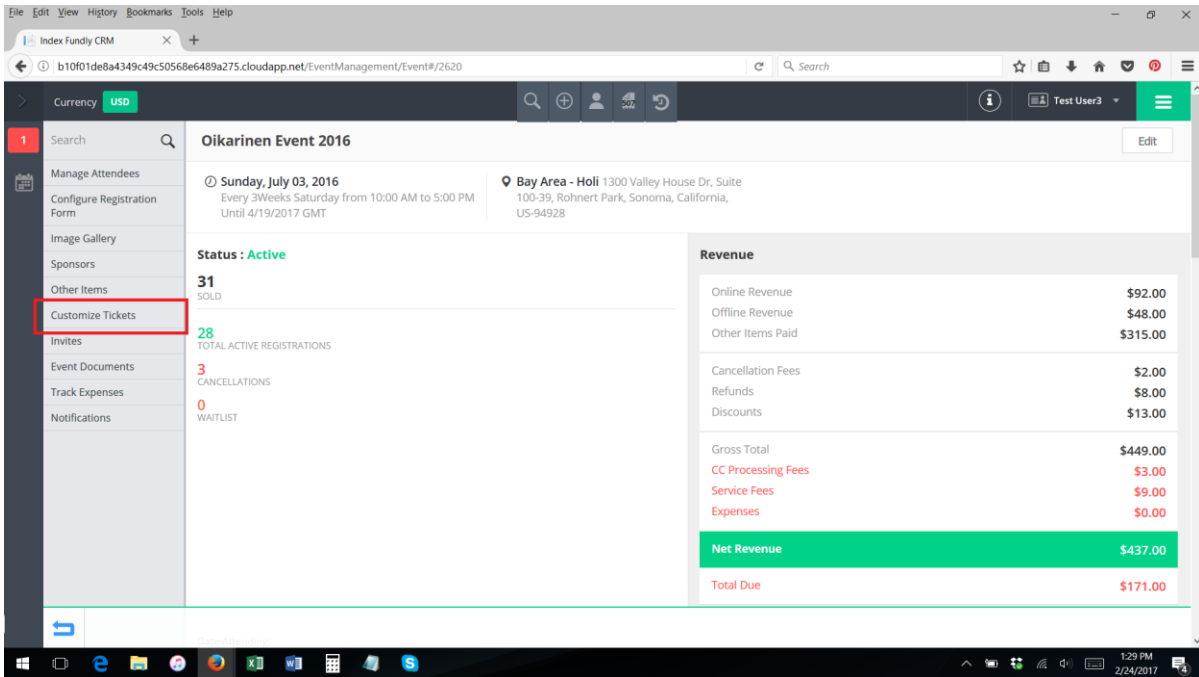
FUNDLY CRM **New Event Ticket Template**

We've added a new event ticket template that includes a map of the event's location!
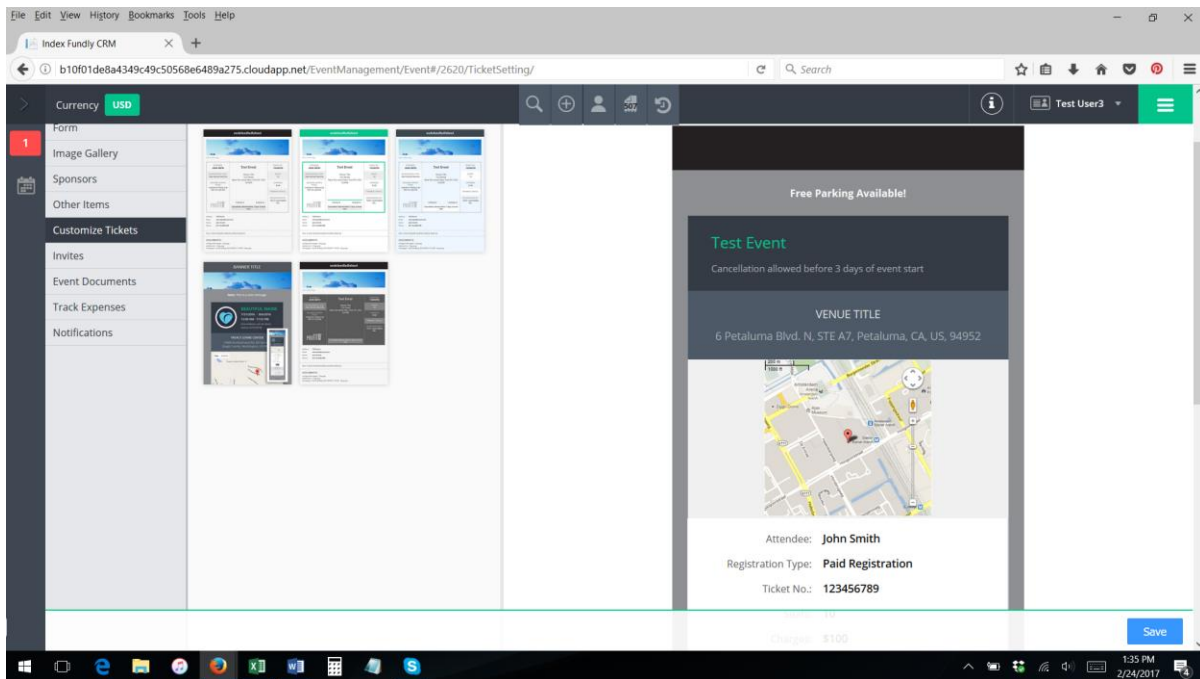
To configure event tickets, while in view/manage event, select Customize Tickets, from the menu on the left.

On the template tab, you can select which template you want to use for your event tickets, then on the Banner, Note, Placeholders, and More tabs, you can customize the look and content of the ticket.
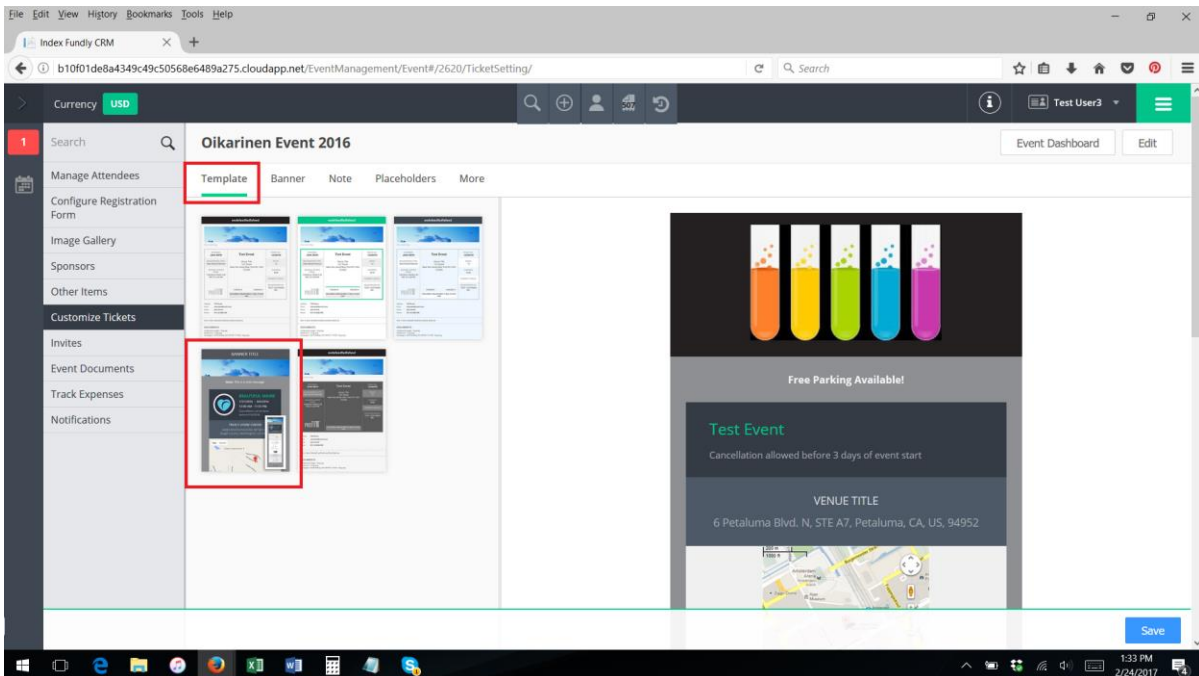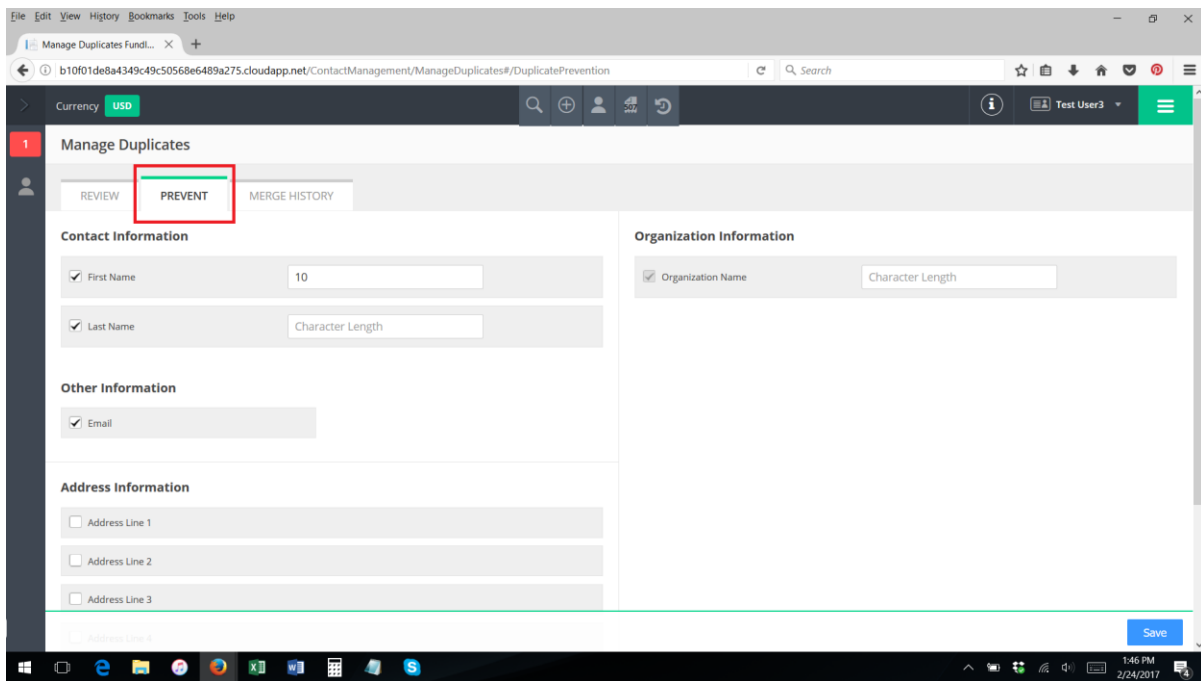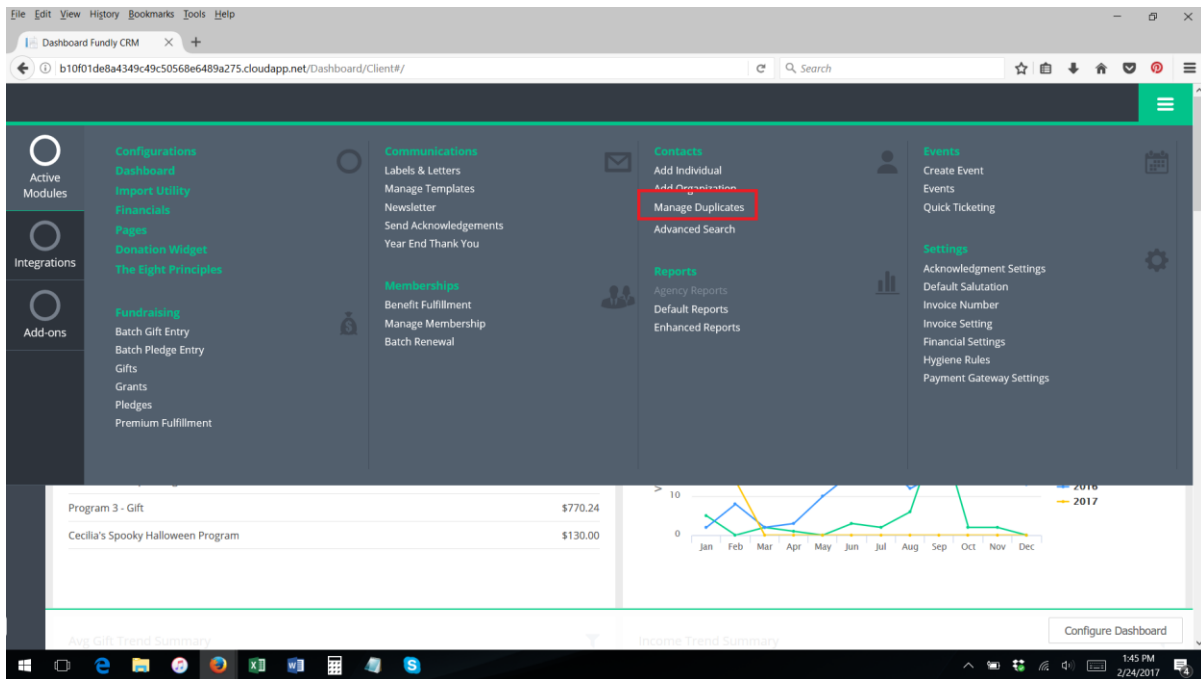
Duplicate Prevention Settings

As a first step towards duplicate prevention setting enhancements that will be coming out later this year, we've separated Individual Contact Duplicate Prevention Settings and Organizational Duplicate Prevention Settings (previously, these functions were sharing some settings); Individual Contact duplicate prevention settings remain unchanged, but Organizational Duplicate Prevention settings are now set on organization name only.
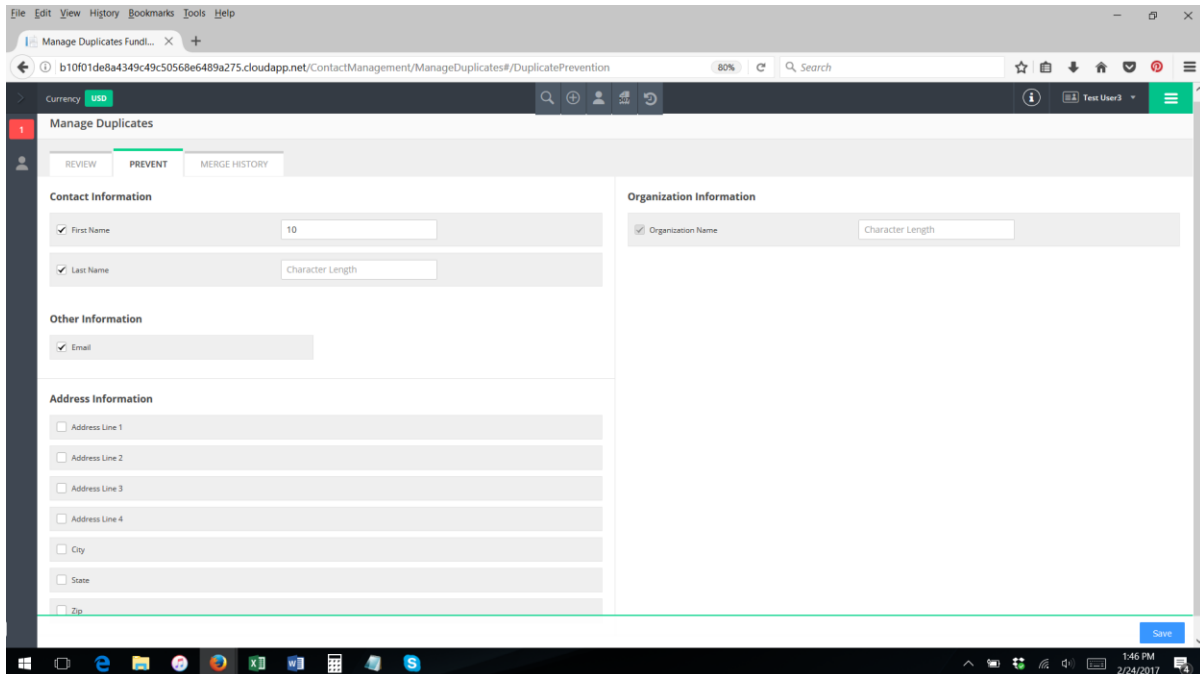

They are both still configured in the same place (from the Main Menu, select Manage Duplicates, then click on the Prevent tab).

However, the screen is formatted slightly differently to make it clear which fields are linked to duplicate prevention for individuals and which are linked to duplicate prevent for organizations.

Quick Search

We've made some exciting - and big! - changes to the Quick Search function, giving users even more search options without opening up Advanced Search. Now when you click in the Quick Search box, a larger search screen will open with several new options: search individuals and organizations separately, search for individuals by first name, last name, full name, or contact ID, and search for Organizations by the beginning of the name, any part of the name, or contact ID.
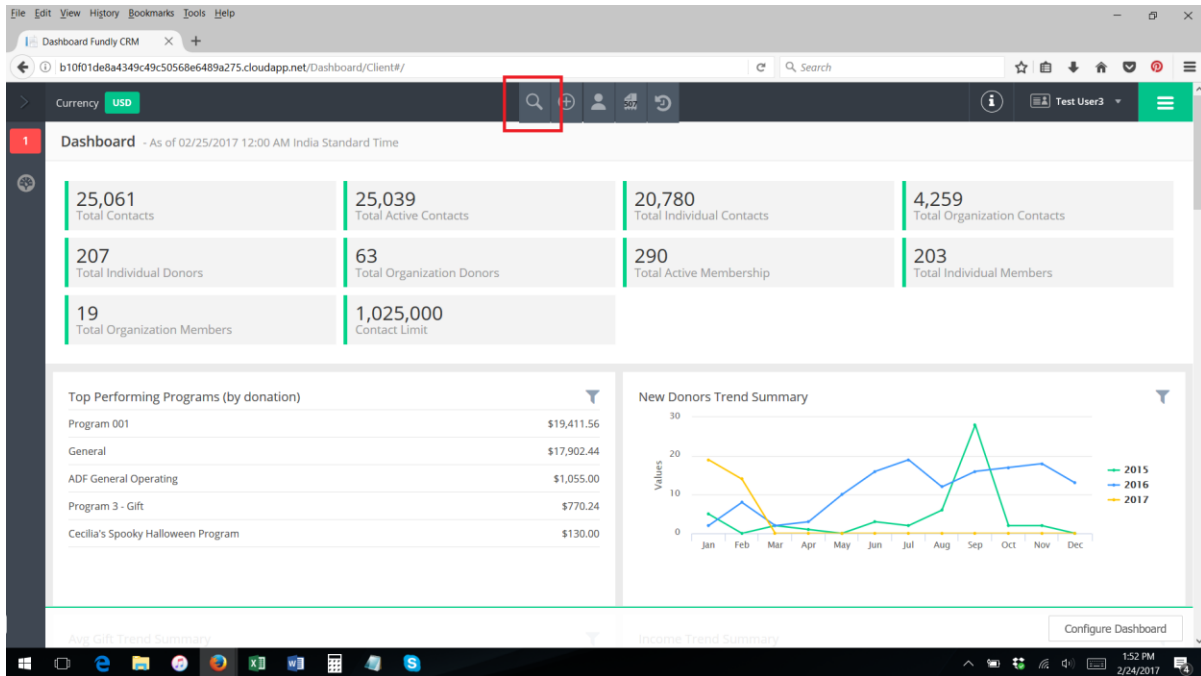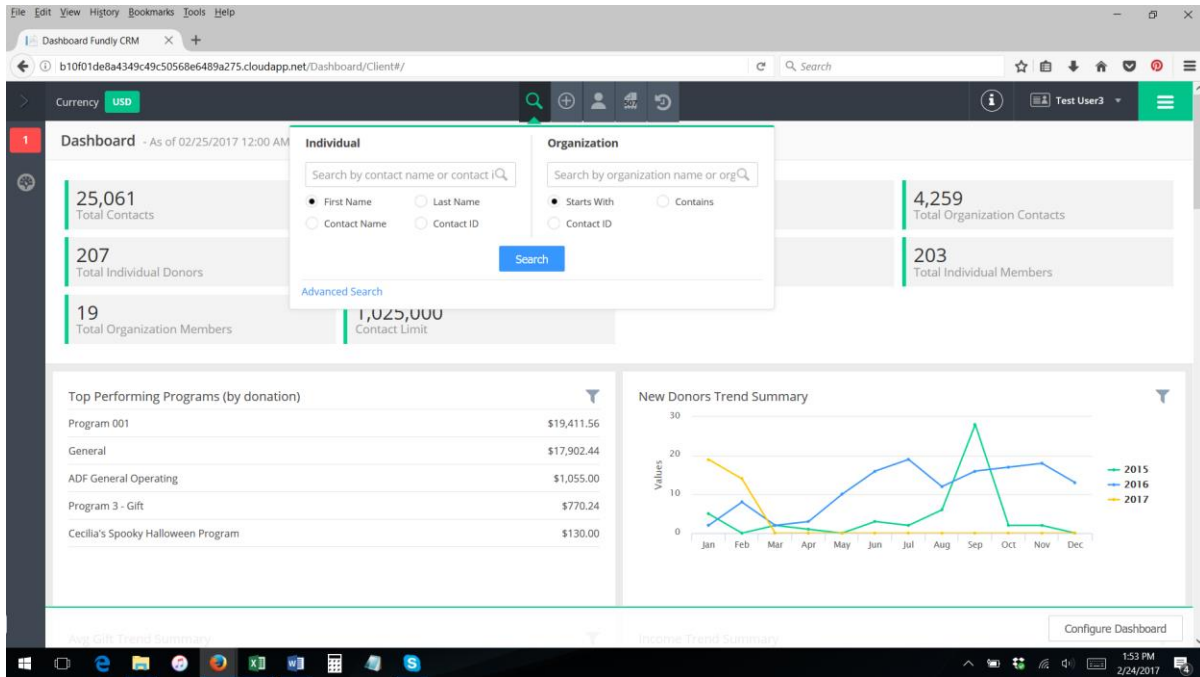
**FUNDLY CRM** **Import Utility Updates**

We've made some updates to the Individual Contact import utility - users can now import international phone numbers, phone extensions, and map "Is Contact Currently Working at this Organization" for contact's Work Info.

To accommodate these changes, we have create a **new import template as of 2/27/2017**. **PLEASE BE SURE TO USE THE LATEST TEMPLATE** as an old template will not work. The template can be accessed from the support library or by clicking the link on the first tab when creating a new import batch.
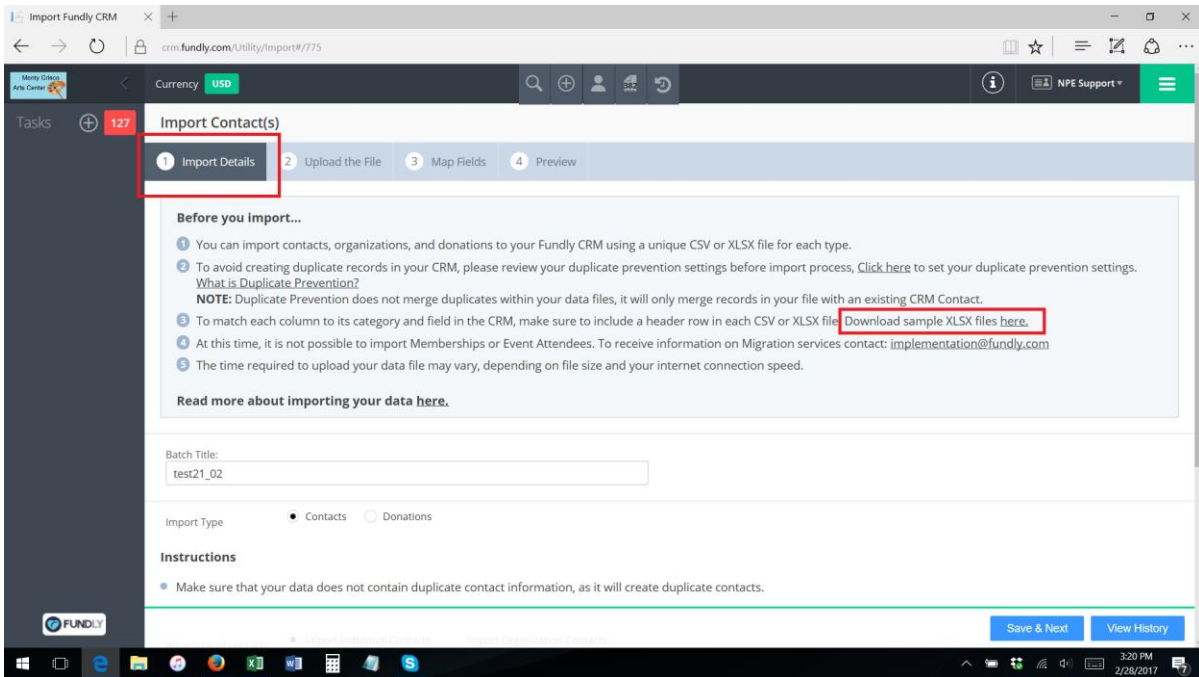
The field mapping scheme for phone numbers has changed slightly, due to the inclusion of international phone numbers and phone extensions. Users should leave the Country Code column and the Phone Extension column UNMAPPED in the field mapping, and instead, map the country code and the extension in the same line/field as the body of the phone number. The screen shot below exemplifies how the mapping should be completed for phone numbers.
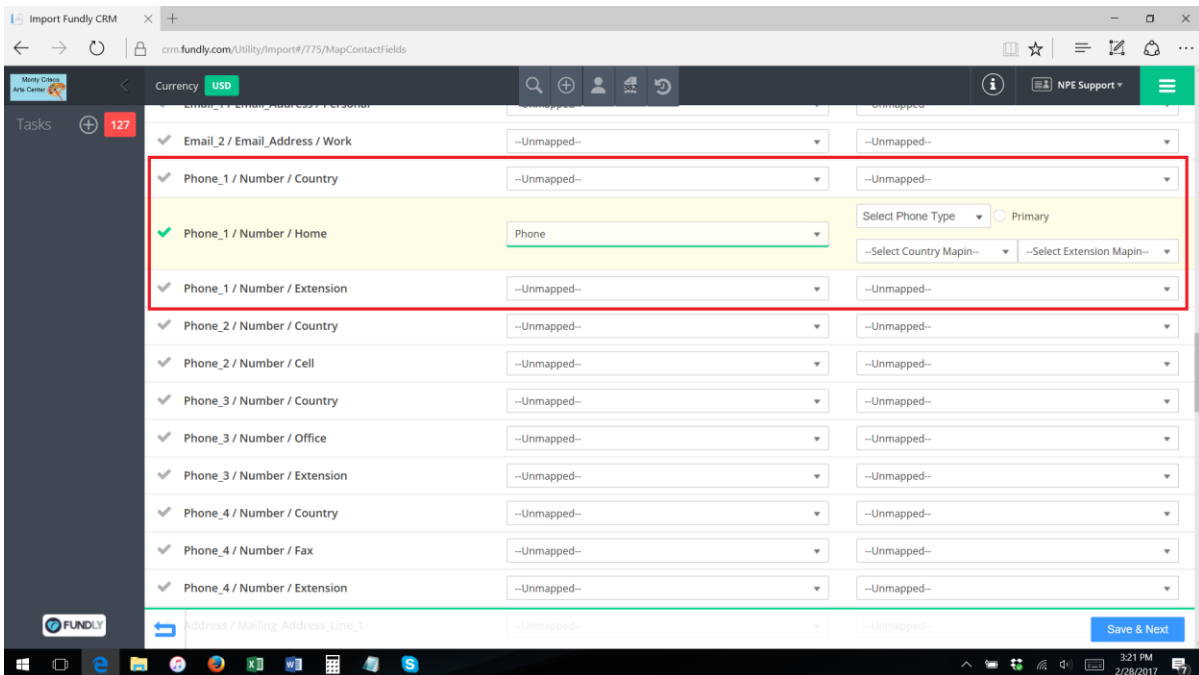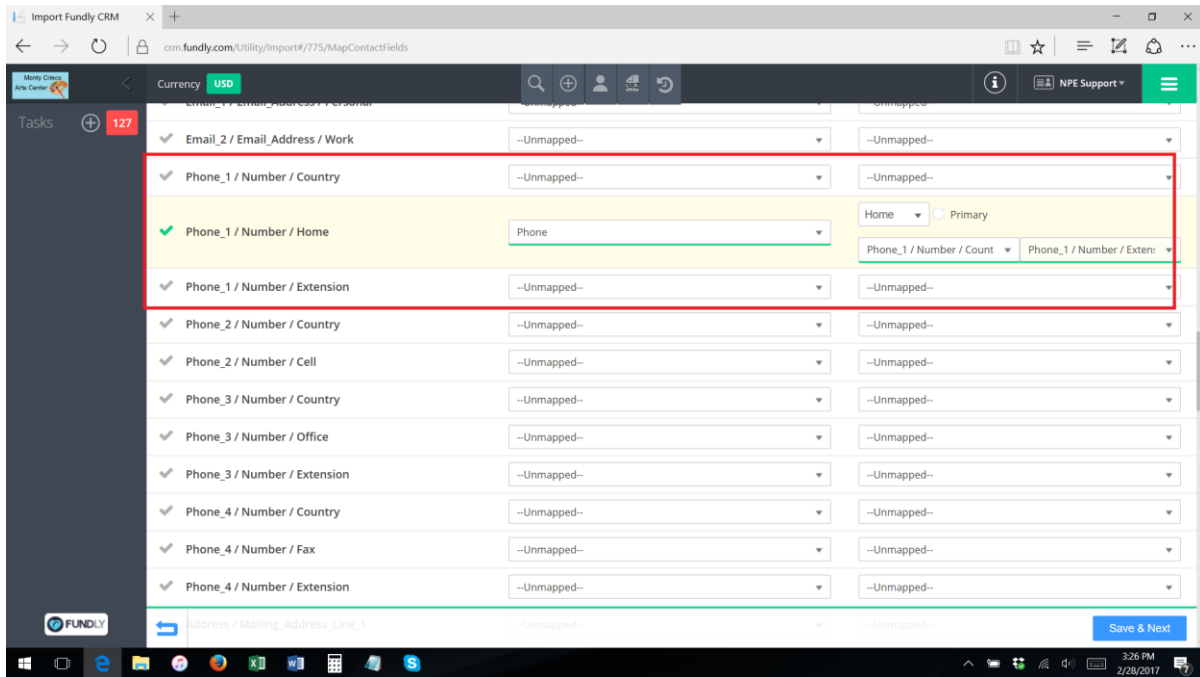
We've also changed the requirements around importing addresses so that now only Zip Code is required (previously Address Line 1 and Zip Code were both required). For any address that does not have a Zip Code, the entire address will be ignored by the import utility.

Please also keep in mind that the import utility uses your CRM's duplicate prevention settings to match records - if you use First Name, Last Name, and Email Address for duplicate prevention, for example, then there must be an exact match between ALL THREE OF THOSE FIELDS for the system to avoid creating a duplicate record. Furthermore, a phone number/email address must be marked as PRIMARY in both the CRM and the import utility to be matched. Otherwise, a duplicate phone/email is entered in the system (and if you are using email for duplicate prevention, then a duplicate record will be created). For example: if Jane Smith has phone number (111) 111-1111 in the CRM but this is not marked as her primary phone, and you import a record for Jane Smith with the same phone number, then that phone number will end up appearing twice on Jane's record. If the phone number is marked as Jane's primary phone in the CRM and in the import utility field mapping, however, then the phone number will be matched and not duplicated.

There will be further changes/tweaks coming to the import utility over the next few weeks, so be sure to check that you have the latest template and instructions whenever you do an import.

FUNDLY CONNECT   **New 'Next Step' Statuses on the Volunteer Dashboard**

For opportunities that have ended but the volunteer was not able to schedule, this opportunity will be tagged as 'Closed' so it will not be possible for the volunteer to schedule anymore.

On the other hand, for one time opportunities that have already reached its required number of volunteers, they will be tagged as 'Full'.

Closed	Scheduling opportunity is closed.
Full	Scheduling one time opportunity capacity is full.

Day(s) of Week are Grayed Out if It's Outside the Schedule

When scheduling by 'Day of Week', you will notice that you will not be able to select days which are outside the available schedule. This is one of the enhancements we have taken to prevent users from scheduling incorrectly.

Park Cleanup

Starts from 10/27/2016 to 10/27/2018. Occurs on Every Mon ,Every Tue ,Every Wed ,Every Thu ,Every Fri from 03:00 PM to 05:00 PM

Availability: Date | Day of Week | Monthly

From Date: 3/1/2017   Till Date: 10/27/2018

From Time: 3:00 PM   Till Time: 5:00 PM

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Every	✓	✓	✓	✓	✓	✓	✓
First	✓	✓	✓	✓	✓	✓	✓
Second	✓	✓	✓	✓	✓	✓	✓
Third	✓	✓	✓	✓	✓	✓	✓
Fourth	✓	✓	✓	✓	✓	✓	✓

Save   Save & Add New   Close

FUNDLY CONNECT Team Feature Enhancements

we've released several enhancements to Teams:

- VACs/Organizations can now add members to the team
- Members will have their own schedule within the team schedule
- VACs can display their list of registered teams on their public site
- Teams can allow other volunteers to join their teams online

VACs/Organizations Can Now Add Members to the Team

We have given the VACs the ability to add members to teams in their database. This can be done by going to the team's profile. At the bottom of their profile, you will see the 'Team Members' section, where the '**Add Team Member**' button is located.

Members Will Have Their Own Schedule within the Team Schedule

In order to credit the hours to the members that have attended the volunteer activity, it is now possible to add member schedules within the team schedule. You will find this option when viewing the team's schedule. Just click the **Edit** drop down and select 'Team Member Schedule'.

The Venue, Shift and Position are selected to match the team's. You must select which volunteer member to schedule and then select from the available dates. Again, when scheduling for day of week, you'll only be allowed to select days within the team schedule.

After you've saved the schedule, you will now see the member's schedule below the team schedule.

VACs Can Display Their List of Registered Teams on Their Public Site

On your public site, you can now add a new menu item under Teams which is the 'Team List'. This page will display all the teams registered in your database. Moreover, this is where other volunteers can join 'Public Teams'.

In order to add this menu item, just go to 'Design My Public Site', go to the 'Teams' tab and then click on the 'Edit Template' button on the side. This will now allow you to edit the sub-menu items. Click on the edit icon under the Team's tab to add sub-menus.
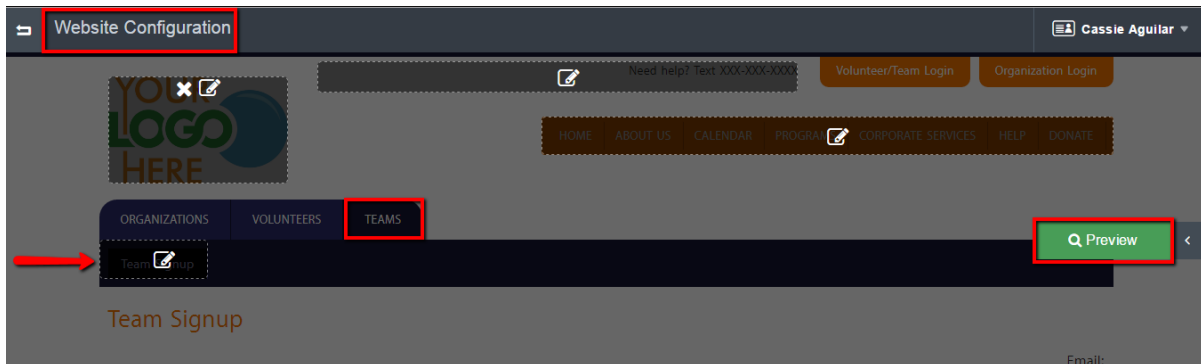

On the 'Add Edit Menu' window, select 'Team List' as the menu type. Enter the name and title and, lastly, save.
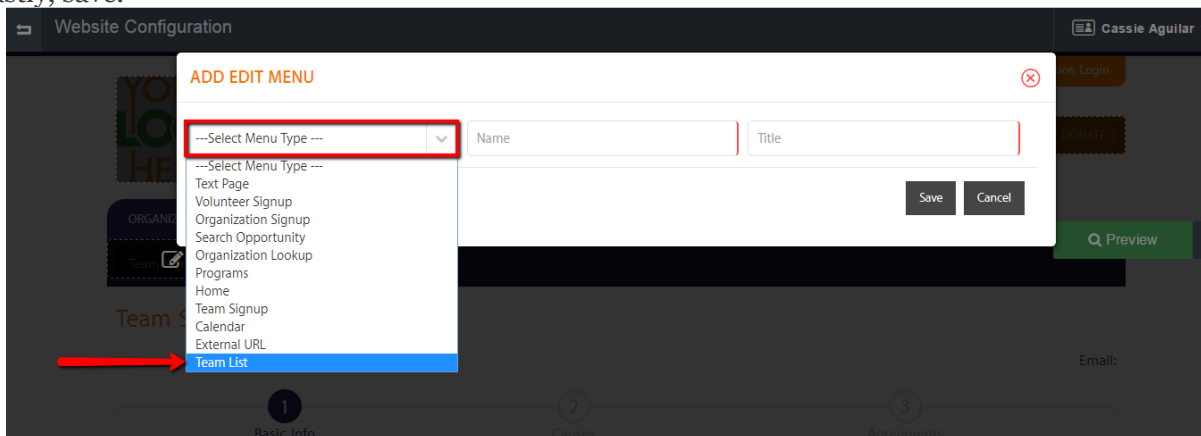
Teams Can Allow Other Volunteers to Join Their Teams Online

On the team captain's dashboard, they will have the option to allow volunteers to join online. This makes the team a 'Public Team'. Once that's turned on, there will be another option to require member approval. On the Summary section is where you'll find the pending list for approval.
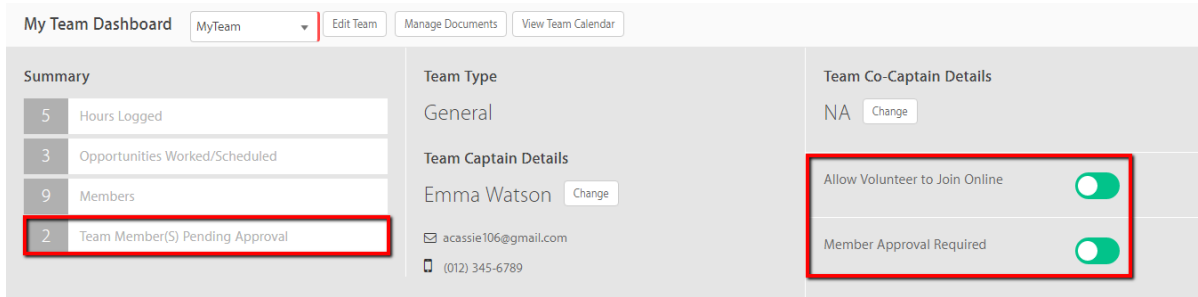
We are committed to ensuring a great user experience with our products and services and are continually striving to ensure our products meet the evolving needs of our customers. As always, we offer a variety of support options, including a tutorial library, daily webinars (fundlyevent.com), live help drop in sessions, and email support (support@fundly.com).

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