



## What's new in Fundly CRM & Fundly Connect...

### Our Best New Features for You!

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

#### **Fundly Connect:**

- Search and Select Multiple Volunteers
- Preferred Locations
- Temporary Substitute for a Volunteer Coordinator
- PDF Sign-In Sheet
- Volunteer Profile/Calendar Enhancements
- Removing 'On Behalf Of'
- Delete 'On Behalf Of' Opportunities

#### **Fundly CRM & Connect:**

- New Weekly "The Report Card" Newsletter Launched
- Reminder: Report Writing Service Now Available

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](mailto:support@fundly.com).***



## Search and Select Multiple Volunteers

Wanting to send an email to selected volunteers from a very long volunteer list? That's now easier with our new "Search and Select" enhancement.

On your Volunteer/Teams list page, just enter the name of the volunteer on the Search field then hit enter. It will pull up matching results and then you can select as many volunteers as you want.

The screenshot shows the 'Volunteers / Teams' interface. A search bar at the top right contains the text 'Cassie'. Below the search bar, there is a 'Select All' button, a '3 Record(s) Selected' indicator, and a 'Clear' button. The main table lists 44 records. The first six records are visible, each with a checked selection box and an 'Edit' button. The records are: Adriane Angayan, Barbie Roberts, Becky Fleck, Betsy Cox, Betty Bruce, and Beverly Ramitan. At the bottom right, there are three buttons: 'SELECTED VOLUNTEERS/TEAMS', 'ALL SEARCH RESULTS', and 'ADD NEW VOLUNTEER'.

You can also review the selected records by clicking on the 'Record(s) Selected' link.

The screenshot shows a modal window titled 'Selected : Volunteers / Teams'. The modal contains a table with three columns: 'Name', 'Email', and '3 Record(s) Found'. The table lists three selected records: Adriane Angayan, Betty Bruce, and Cassie Aguilar. Each record has a 'Deselect' button next to it. The modal is overlaid on the 'Volunteers / Teams' page, which is dimmed in the background. The search bar at the top right of the page still contains 'Cassie'.

Once you've selected the volunteers, just click on 'Selected Volunteers/Teams' to perform an Action

like sending an email.

The screenshot shows a table titled "Volunteers / Teams" with a search bar containing "Cassie" and a result count of "44 Record(s) Found". The table has columns for "Volunteer/Team Name", "Username", "PIN", "Background Check Status", and "Tag(s)". Several rows are visible, each with a checkbox and an "Edit" button. A context menu is open over the row for "Becky Fleck", listing actions such as "Send Email", "Communication Preferences", "Remove Volunteers/Teams", "Activate Volunteer(s)", "Deactivate Volunteer(s)", "Background Check", and "Assign Tag(s)". At the bottom of the table, there are buttons for "SELECTED VOLUNTEERS/TEAMS", "ALL SEARCH RESULTS", and "ADD NEW VOLUNTEER".

## Preferred Locations

You can now save “preferred locations” when creating or editing opportunities. These are locations that are frequently used for your opportunities. By saving these preferred locations, you won’t have to enter them over and over again when creating/editing locations – you just have to select and save!

In order to save a preferred location, you must enter the complete address first when adding a location for an opportunity. Before you hit save, click the checkbox ‘Save as Preferred Location’.

The screenshot shows a "Location" form with the following fields: "Preferred Location" (dropdown), "Title" (Valley House Dr), "Address Line 1" (1300 Valley House Dr), "City" (Penngrove), "State" (CA), "Country" (US), "Routes" (701A + 2 selected), "Address Line 2" (empty), "County" (empty), and "Postal Code" (94951). Below the form is a map showing the location at 1300 Valley House Dr, Penngrove, CA 94951. At the bottom right, there is a checkbox labeled "Save as Preferred Location" which is checked, along with "Save" and "Close" buttons.

You can also add one from Configurations. Just go to Preferred Locations then click on 'Add Location' at the bottom right of the screen.

Title	Address	Status	
Valley House Dr	1300 Valley House Dr, Penngrove, Sonoma, CA, US, 94951	✓	Edit
Spring Valley United Methodist Church	Spring Valley Road, Farmers Branch, Dallas, Texas, US	✓	Edit

To use a preferred location, just select from the 'Preferred Location' dropdown when adding/editing a location.

Location

Preferred Location: ---Select from Preferred Location---

Title: Valley House Dr

Address: Enter a location

Routes: Select Route(s)

Can't find your location?

Save as Preferred Location

Save Close



## Temporary Substitute for a Volunteer Coordinator

There will be times that coordinators become unavailable due to personal reasons and making them unable to perform their tasks like managing the volunteers of a specific opportunity/location. In

cases like this, the admin can always fill in a temporary substitute. This substitute will be able to access the coordinator dashboard so they can perform the tasks instead.

To assign a temporary substitute for a volunteer coordinator, on the 'Volunteer Coordinator' screen, click on the 'Substitute' button of the volunteer you'd like to assign a substitute.

The screenshot shows the 'Volunteer Coordinator' interface. At the top, there is a search bar and an 'Assign Coordinator' button. Below this is a table with columns for 'Coordinator Name' and 'Email'. One entry is visible: Anna Faris with email acassie113@gmail.com. A red box highlights a 'Substitute' button next to her name. Below the table is another table with columns for 'Opportunity', 'Venue', and 'Date'. Two rows are shown, both for 'Kids Playhouse Watchers' at 'Default' venue, with date ranges '1/30/2017 - 1/31/2017' and '1/26/2017 - 1/28/2017'. Each row has a 'Change' dropdown button.

On the pop up, the user must enter the date range for which the coordinator is unavailable in order to display all the opportunities that fall in those dates. The user must then enter the name of the user/volunteer that will serve as the substitute and then hit 'Substitute' to save.

The screenshot shows a 'Substitute Coordinator' pop-up form. It has a title bar with a close button. The form contains two date input fields: 'Start Date' and 'End Date', both set to '1/31/2017'. Below these is a table with columns for 'Opportunity', 'Venue', 'Date', 'User', and 'Volunteer'. One row is visible for 'Kids Playhouse Watchers' at 'Default' venue, with date range '1/30/2017 - 1/31/2017'. The 'User' field is set to 'Barbie Roberts' and the 'Volunteer' toggle is turned on. At the bottom right, there are 'Substitute' and 'Cancel' buttons.



In a hurry and needed to print a sign-in sheet for the volunteers? Users can now save and print a PDF file which includes a list of volunteers for a specific schedule of an opportunity. It is found on the Attendance screen when managing volunteers for an opportunity.

Manage Volunteers

**Attendance - Park Cleanup** Edit Opportunity

**Attendance** 1/13/2017 Get Attendees

Invites

Notification 28 Record(s) Found

	Volunteer	Location	Shift	Position
<b>CHECK IN ALL</b>	Volunteer	Location 1	Unlimited Volunteers	
<input checked="" type="checkbox"/> ATTENDED	Adriane Angayan	Location 1	Unlimited Volunteers	Volunteer
<input checked="" type="checkbox"/> ATTENDED	Anna Faris	Location 1	Unlimited Volunteers	Volunteer
<input checked="" type="checkbox"/> ATTENDED	Barbie Roberts	Location 1	Unlimited Volunteers	Volunteer
<input checked="" type="checkbox"/> ATTENDED	Blake Lively	Location 1	Unlimited Volunteers	Volunteer
<input checked="" type="checkbox"/> ATTENDED	Britney Spears	Location 1	Unlimited Volunteers	Volunteer
<input checked="" type="checkbox"/> ATTENDED	Cashew Aguilar	Location 1	Unlimited Volunteers	Volunteer

← BACK EXPORT SIGN-IN SHEET EXPORT



**Unlimited Volunteers – Park Cleanup**  
 Organization Served: Blue Kitty Action Center  
**January 13, 2017 03:00 PM - 05:00 PM**  
**Location: Location 1, Street 1 Rohnert Park, CA 94928 US**

Name	Team Name	Phone	E-Mail	Over 18?	Signature
Adriane Angayan		22222222222222	adriane.angayan+MOW@fundly.com		
Anna Faris			acassie113@gmail.com		
Barbie Roberts		1231414	kjqaguilar@gmail.com		
Blake Lively		(012) 345-6789	acassie108@gmail.com		
Britney Spears			kfhsilkgnsdig@gmail.com		
Cashew Aguilar		111111111111	cashewa111@gmail.com		
Cassie Aguilar		44444444444444	cassie.aguilar+MOW@fundly.com		
Cassie Aguilar		11111111111111	cassie.aguilar+vcomc@fundly.com		
Cassie Lagon			lagon89@yahoo.com		
Elizabeth Swann		(012) 345-6789	acassie109@gmail.com		
Emilia Clarke			adifihsgk@gmail.com		
Emma Watson		(012) 345-6789	acassie106@gmail.com	Yes	
Jane Porter			kjqaguilar2+1@gmail.com		
Jassy Narciso		22222222222222	jassynarciso@gmail.com		
Jassy Suarez		33333333333333	jassy.suarez+MOW@fundly.com		
Jennifer Lawrence			acassie102@gmail.com		
Jessica Rabbit		11111111111111	kjqaguilar+a@gmail.com		
Ken Carson		(012) 345-6789	fundlyconnect101@gmail.com		
Kim Lee		44444444444444	klee@fundly.com		



## Volunteer Profile/Calendar Enhancements

We've made several tweaks to the way the volunteer profile and calendar, especially as related to Upcoming Vacations. You will now see Upcoming Vacations posted on the volunteer's profile. In addition the calendar on the volunteer's profile highlights vacation dates as well as the current date.

UPCOMING VACATION FROM 1/28/2017 TO 1/29/2017

Emma  
PIN: B000002638 | None

SCHEDULE VACATION

(012) 345-6789 | 9/27/1991  
Street 1, Rohnert Park, Sonoma, CA, US, 94928

Send Email: No | Joining Date: 6/22/2016

**Summary**

7	Hours Logged
7	Opportunities Worked/Scheduled
0	Opportunities Waiting Approval
0	Hours Pending For Approval

**Trainings**

Training	Date	Attended Dates
No records found.		

**Tag(s)**

Volunteer Coordinator

**Opportunity Calendar** | Opportunity List

January 2017 | 1/25/2017 | Go

WEEK | MONTH

Schedule for opportunity | Schedule for training | Volunteer is on vacation

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1	2 9:00 AM - 5:00 PM Tree Planting Default Total Logged Hours: 0	3 9:00 AM - 5:00 PM Tree Planting Default Total Logged Hours: 0	4 9:00 AM - 5:00 PM Tree Planting Default Total Logged Hours: 0	5 9:00 AM - 5:00 PM Tree Planting Default Total Logged Hours: 0	6 9:00 AM - 5:00 PM Tree Planting Default Total Logged Hours: 0	7 9:00 AM - 5:00 PM Tree Planting Default Total Logged Hours: 0

When printing the volunteer calendar, the user can now set the date range for which dates to print. Also, the user can select to print either in portrait or landscape orientation.

**Print**

Print For: 7 Days | Month | **Date Range**

Orientation: Portrait | **Portrait** | Landscape

From: 1/25/2017 | To: 2/24/2017

Print | Cancel

Opportunity Calendar | Opportunity List

January 2017 | 1/25/2017 | Go

WEEK | MONTH

← BACK | EDIT VOLUNTEER



## Removing 'On Behalf Of' Organization

When creating an opportunity and accidentally selecting an organization as 'On Behalf of', the user can now “unselect” by choosing the 'Select' option from the dropdown.

**Volunteer Opportunity**

1 Basic Info.   2 Requirements   3 Publish

On behalf of:  Opportunity Name:

**--Select--**

- Aging True
- Alzheimers Association, Central and North Florida
- American Lung Association of Florida, Inc.
- American Red Cross
- AnnieRuth Foundation
- Arc Jacksonville, The
- Art Center Coop, The
- Beaches Fine Arts Series
- Beaches Habitat for Humanity
- Ben's Place Services, Inc
- Ben's Place Services, Inc.
- BOOKS-A-GO GO
- Bridge of Northeast Florida, The
- Brooks Rehabilitation
- Cassie for Support
- Catholic Charities Jacksonville Regional Office
- Celebration Church
- Child Guidance Center
- Children's Home Society of Florida

ity:  
No

Edit

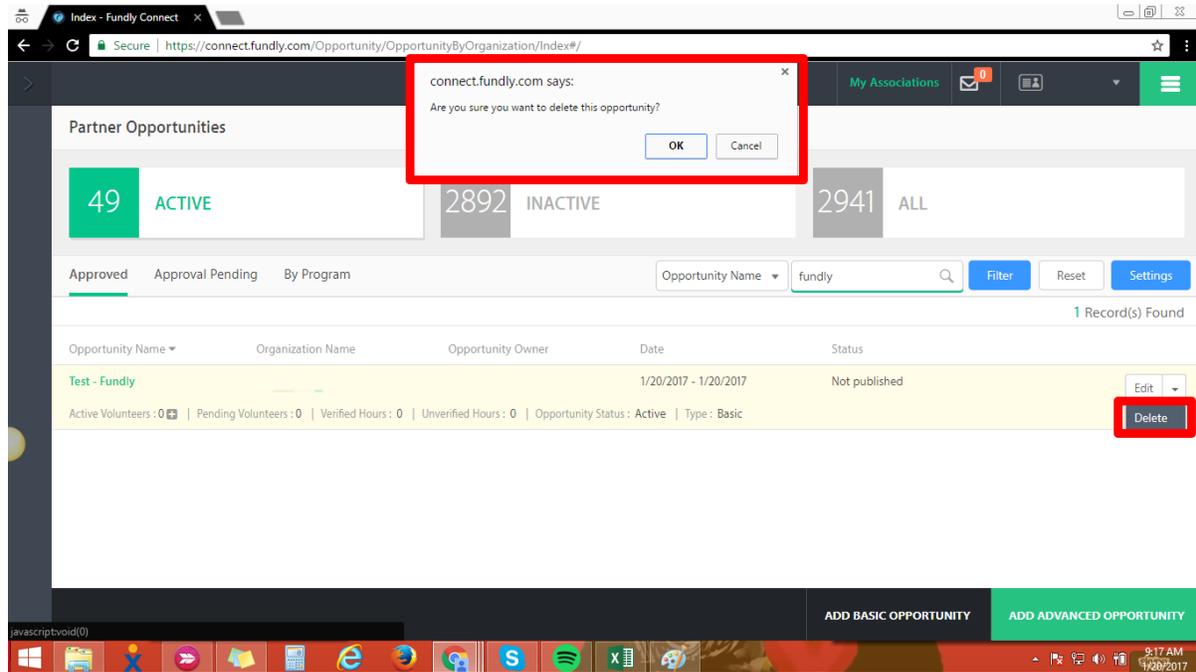
← BACK



## Deleting 'On Behalf Of' Opportunity

VACs may sometimes create an opportunity for their partner organizations incorrectly. We have added a Delete button on these 'On Behalf of' opportunities so the VAC can delete them and start

over.



## & New Newsletter - The Report Card

Hopefully, you've received the first two issues of our new weekly newsletter called "**The Report Card**," which brings you reporting tips, tricks, and best practices right to your in-box every Monday. Each week, we highlight a tool or technique for getting the results you want in CRM and Connect reports with a full written and video tutorial; it's like your own private training session! Each week's topic is based on the most frequently asked reporting questions. If you have a topic you'd like us to cover in "The Report Card"/our online tutorial library, email us at "support@fundly.com."

If you haven't been receiving those, please check your spam folder and/or contact your email/domain provider to ensure that "support@fundly.com" is whitelisted. And if someone has been forwarding you our newsletters and you wish to receive them directly, you can sign up at "[fundlyevent.com](http://fundlyevent.com)" (newsletter sign up is on the left hand side of the screen).

We will still also be running our weekly "Reporting Huddle" live help session every Monday and we have our weekly **drop-in help session on Fridays** as well (**for both v1 and v2 clients as well as a separate session for Connect clients**). Visit [fundlyevent.com](http://fundlyevent.com) for a full list of upcoming webinars and for information on how to join the Reporting Huddle or live Drop In Help forums.



And for those times when you don't have the time or know-how to write your own report, don't despair! You can have us write the report for you (for a fee). Just fill out a form detailing your request and submit it to us. We'll provide you with an estimate of the total cost and turnaround time and, if you approve the cost, we'll write the report for you. All of the details and the report request form are now in our support library (in the Reports section). Please be aware that average turn around time for us to write a report for you is 5 business days from the time you approve the report cost, so please submit requests as far in advance of needing a report as possible.

[CRM Report Request Form](#)

[Connect Report Request Form](#)

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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).**



Text

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