



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 Support Tutorial for Contacts: Stages of Development
- New Support Tutorial for Financials: Create Deposit
- New Weekly Newsletter - "The Report Card"
- New Service - Report Writing

Connect:

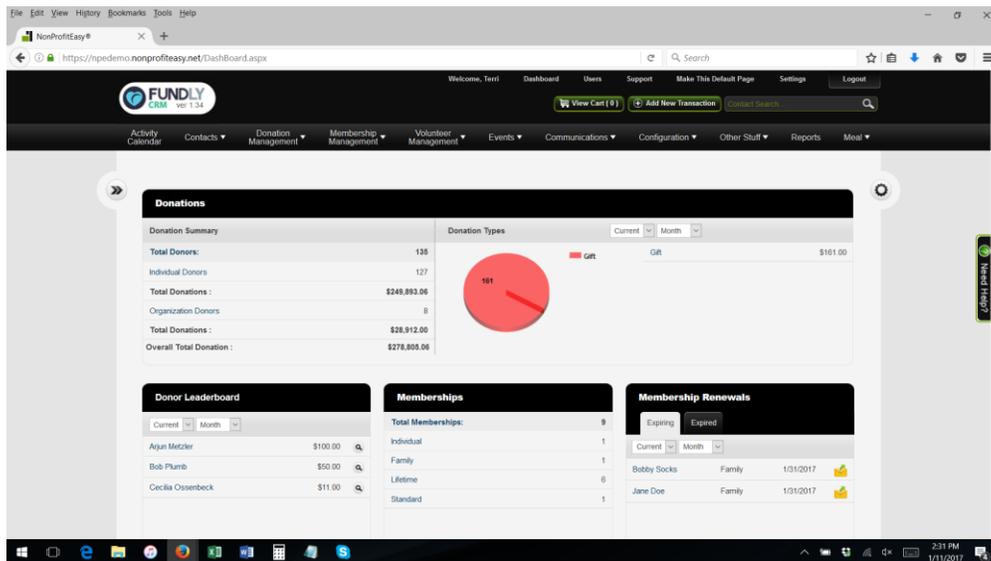
- Vacation Feature
- New Weekly Newsletter - "The Report Card"
- New Service - Report Writing

Read on for all the details!

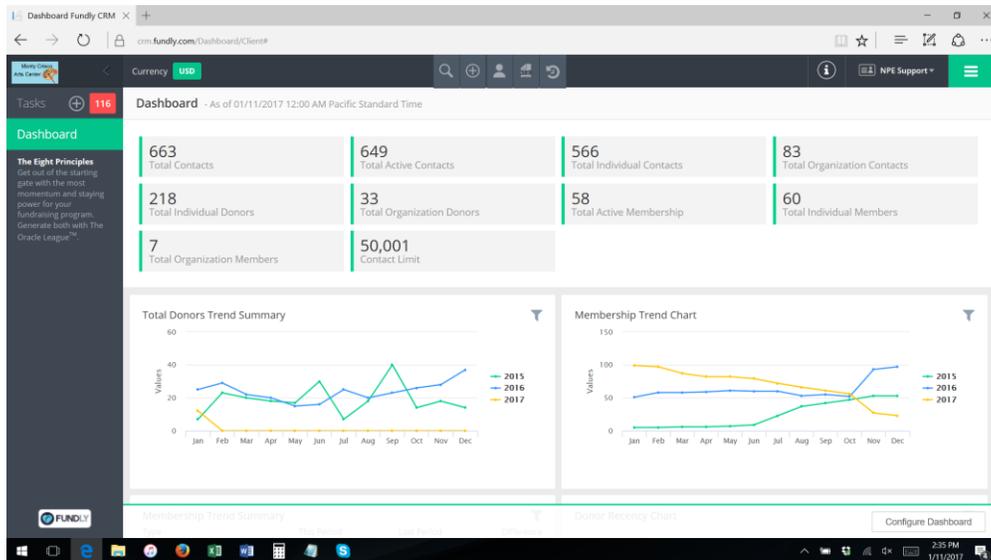
(if images are not displaying correctly in this email, you can find a copy of this newsletter in our Connect and CRM v2 Support Libraries)

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!

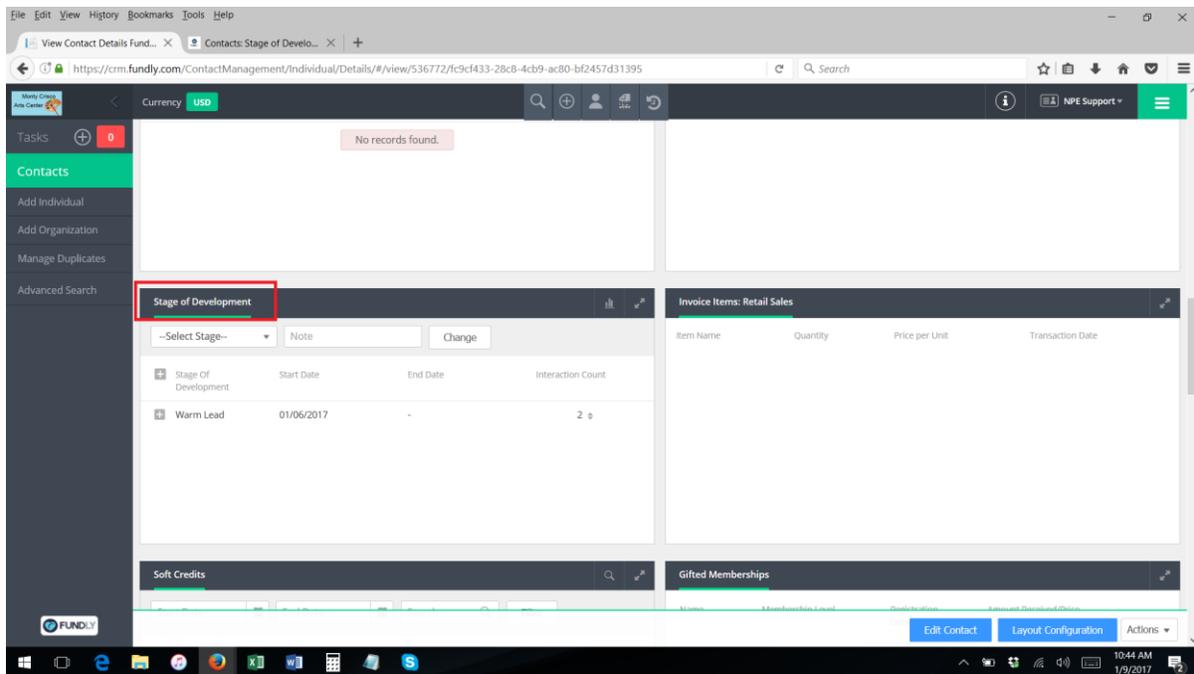


If you're still using Version 1 of Fundly CRM, we encourage you to check out all the great features that Version 2 offers. We hold a "Getting Started w/Fundly CRM v2" webinar every Monday at 11:00 am PST that provides an overview of all that the new version of Fundly CRM has to offer. For more information, or to discuss upgrading to v2, contact implementation@fundly.com.



New Tutorial - Stages of Development

We've been hard at work updating our support library to ensure that we have tutorials for all of CRM v2's latest features. We've recently added two tutorials on how to use the Stages of Development module, which is on contact records.



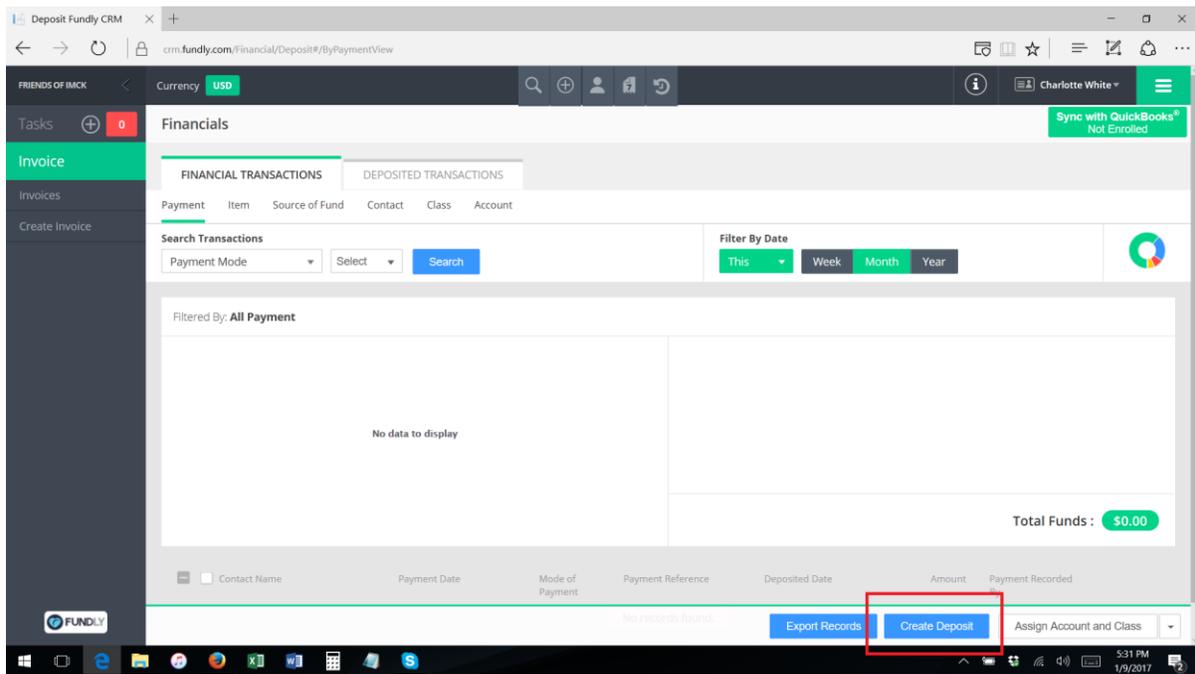
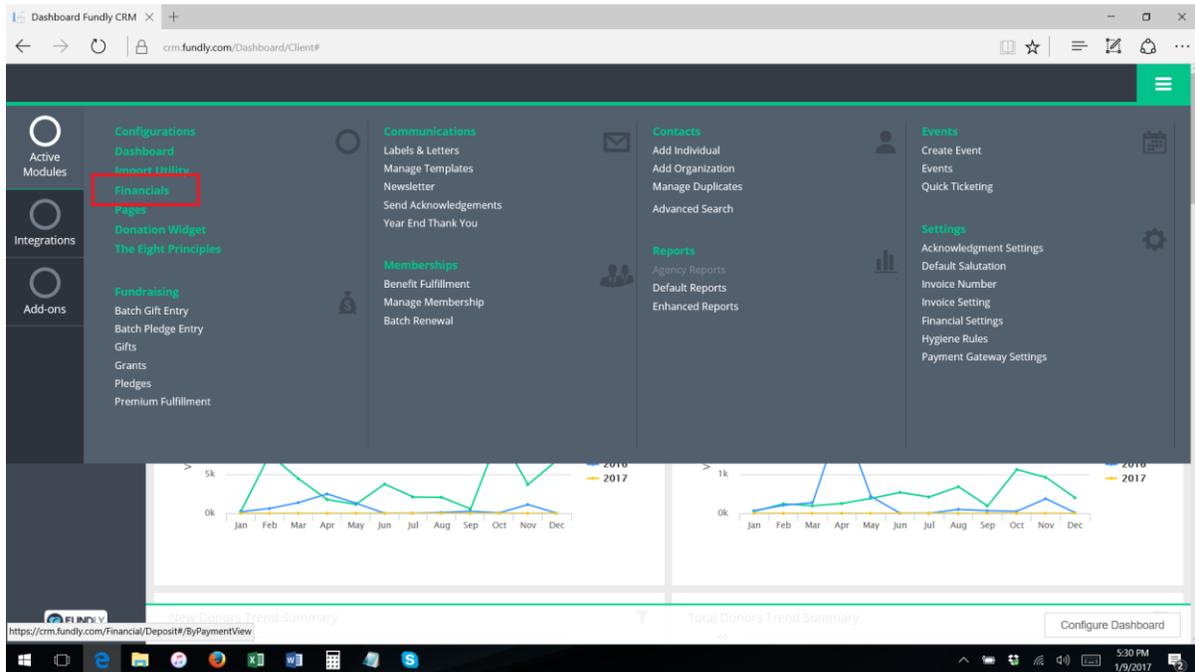
Ever wonder what that module is for? It's for tracking donor/lead cultivation! It can be a pretty handy tool, and we now have a two-part tutorial on how to configure and use the module: [Stage of Development Part I - Configure Stages](#) and [Stage of Development Part II - Add/Edit Stage of Development](#).



New Tutorial - Financials: Create Deposit

The Financials screen is full of a wealth of tools and information that can help your accounting staff reconcile financial transactions recorded in your CRM with your account software and bank statements. One such tool is the "Create Deposit" function that allows users to group transactions

together as they would appear together in a bank deposit.



We've added a [full tutorial](#) on how to use this function in our support library.



& **New Newsletter - The Report Card**

We're launching a new weekly newsletter called "**The Report Card**," which will bring reporting tips, tricks, and best practices right to your in-box every Monday. Each week, we'll 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! Look for the first edition of **The Report Card** on Monday, January 16th!

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 for a full list of upcoming webinars and for information on how to join the Reporting Huddle or live Drop In Help forums.



& **New Service - Report Writing**

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](#)



Vacation Feature

This is a handy new feature! Users can now indicate when a volunteer is on vacation; this will ensure that users know when a volunteer is unavailable and also understand why a volunteer's schedule may have dropped off or stopped.

Volunteers can easily indicate their vacation days from their volunteer accounts.

My Associations 0 Cassie Aguilar

My Volunteering Dashboard PIN SCHEDULE VACATION

22

17

4

HOURS LOGGED OPPORTUNITIES WORKED/SCHEDULED OPPORTUNITIES PENDING APPROVAL

As an admin, users can also open the volunteer's profile and schedule the vacation there or from the volunteer list.

Manage Volunteer

Cassie Aguilar
PIN: B000103228 | None

SCHEDULE VACATION

ecassie101@gmail.c... -
Street 1, Rohnert Park, Sonoma, CA, US, 94928

Send Email: **No** | Joining Date: 10/6/2016

Summary

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

Trainings

Training	Date	Attended Dates
No records found.		

Volunteers / Teams

Action Apply

5 Record(s) Found

Volunteer/Team Name	Username	PIN	Tag(s)	
<input checked="" type="checkbox"/> Cassie Aguilar	Signed Up via Facebook	B000103228		<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Edit </div>
Email : ecassie101@gmail.com Address : Street 1, Rohnert Park, Sonoma, CA, US - 94928 Joining Date : 10/6/2016				

Schedule Vacation
 Reset Password
 Assign to an opportunity
 Remove Volunteer
 Deactivate
 Assign Tag(s)

After scheduling the date range for the vacation, the user will be notified of the opportunities affected by those dates and can immediately cancel dates by confirming.

Cassie Aguilar
PIN: B000103228

Send Email: **No**

Summary

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

Schedule Vacation - Opportunities Impacted

Note: You will no longer be scheduled for the opportunities on these dates.

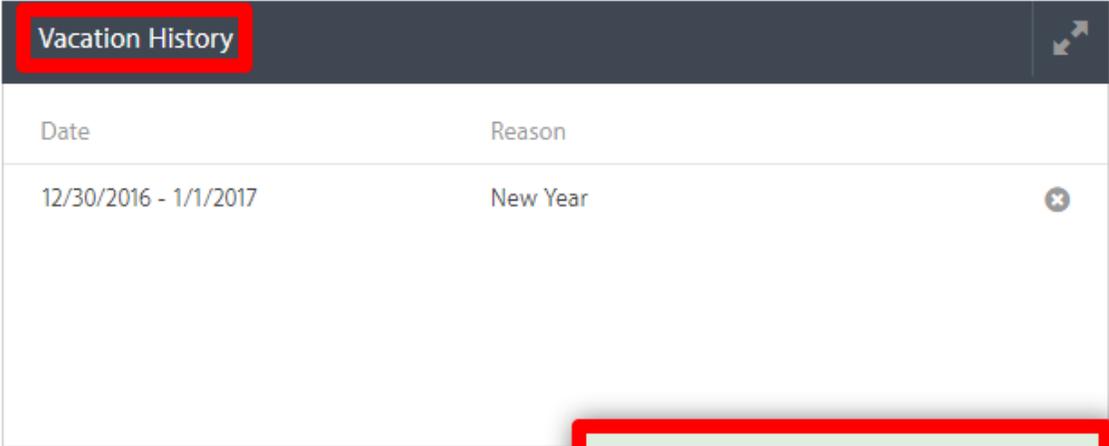
Park Cleanup

- 12/30/2016

Confirm and Proceed
Cancel

ecassie1010@gmail... -
Park, Sonoma, CA, US, 94928

Users will also have the ability to view the Vacation History located on the volunteer's profile. At the same time, this is also where the volunteer and the admin can cancel those scheduled vacations.



The screenshot shows a 'Vacation History' section with a table. The table has two columns: 'Date' and 'Reason'. One entry is visible: '12/30/2016 - 1/1/2017' for 'New Year'. A red box highlights the 'Vacation History' header. Below the table, a green message box says 'Vacation has been scheduled successfully.' A red box highlights this message. At the bottom right, there is a green button labeled 'EDIT VOLUNTEER'.

Date	Reason
12/30/2016 - 1/1/2017	New Year

Vacation has been scheduled successfully.

EDIT VOLUNTEER

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).



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