



Great New Things From Fundly CRM...



On March 22nd, we will be releasing a new partnership between Fundly CRM and Donor Search, a leading provider of wealth and philanthropic screening services.

Fundraise Easier with Donor Search!

With this new integration, Fundly CRM v2 users will be able to get a wealth profile on their existing contacts that provides a variety of information on each contact's past giving history.

Abby Jacks
 ContactId : 409561 | Last Modified on 02/22/2017 by NPE Support
 abby.jacks@example.com | 1111 This Street, Thestown, Sonoma, CA - 94954
 \$485.00 LEDGER BALANCE As of Mar 17, 2017 12:00:00 AM

Giving Summary
 Summary as on Mar 17, 2017 12:00:00 AM

All Sources	
\$10.00 First Gift (Aug 17, 2016)	\$15.00 Latest Gift (Dec 4, 2017)
\$546.00 Lifetime Gift	\$27.30 Average Gift
\$25.00 Most Common Gift	-8 Recency (Months)
\$101.00 Largest Gift	20 Number of Gifts

Giving Details

Gift	Date	Amount
2017 Annual Fund (Pledge scheduled - 12/4/2017)	12/4/2017	\$25.00
2017 Annual Fund (Pledge scheduled - 11/13/2017)	11/13/2017	\$15.00
2017 Annual Fund (Pledge scheduled - 8/13/2017)	08/13/2017	\$25.00
2017 Annual Fund - Gift Card to Hallmark Store	03/14/2017	\$25.00
2017 Annual Fund	03/13/2017	\$25.00

Wealth Profile
 Summary as on Mar 10, 2017 12:00:00 AM

DS3 DS Rating	\$5,000 - \$9,999 Ask Based On Wealth	0 Quality Score	\$0.00 Aggregate Charitable Giving	0 Number Of Charitable Gifts
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Communication Preferences

Phone Call: Yes, Send Mail: Yes, Send Email: Yes, g

Buttons: Edit Contact, Layout Configuration, Actions

Donor Search information helps you prospect better, by helping you to target an appropriate ask to your existing contacts. The Donor Search database pulls information from over 25 different sources and compiles it in one place for you.

Summary of Abby Jacks

Your Current Plan is **Launch**.

DS3 DS Rating	0 Quality Score	\$6,771.00 Estimated Capacity	\$0.00 - \$0.00 Range Of largest Gift Else Where
\$0.00 Estimated Real Estate	NA 990PF Flag	\$0.00 Aggregate Charitable giving	0 Number of Charitable Gifts
\$0.00 Aggregate political giving	0 Number of Political Gifts	NA Flag for SEC Insider Status	\$0.00 SEC Insider Holdings
\$67,705.00 Average HH Income(census data)	NA Boat Ownership Flag	NA Plane Ownership Flag	

By Interest

0 Number of Gifts in Higher Education	\$0.00 Higher Education Total	0 Number of Education Gifts	\$0.00 Aggregate Education Giving
0	\$0.00	0	\$0.00

Buttons: Close

Summary of Abby Jacks

\$67,705.00 Average HH Income(census data)	NA Boat Ownership Flag	NA Plane Ownership Flag
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By Interest

0 Number of Gifts in Higher Education	\$0.00 Higher Education Total	0 Number of Education Gifts	\$0.00 Aggregate Education Giving
0 Number of Philanthropy and Grant Gifts	\$0.00 Aggregate Philanthropy And Grant Giving	0 Number of Healthcare Gifts	\$0.00 Aggregate Healthcare Giving
0 Number of Arts Gifts	\$0.00 Aggregate Arts Giving	0 Number of REP Gifts	\$0.00 Aggregate REP Giving
0 Number of DEM Gifts	\$0.00 Aggregate DEM Giving	0 Number of Other Political Gifts	\$0.00 Aggregate Other Political Giving
0 Number of Society Benefit Gifts	\$0.00 Aggregate Society Benefit Giving	0 Number of Gifts for Religion	\$0.00 Aggregate Giving for Religion

exciting? Donor Search will be available/integrated with EVERY FUNDLY CRM SUBSCRIBER! The basic "Ignite" level data (the 5 pieces of information shown on the View Contact screen) IS NOW AVAILABLE FOR FREE to every Fundly CRM v2 client. That's right! Our gift to you is basic wealth profile information on all of your existing contacts (as of Wednesday March 22nd)!

Additional Donor Profile information will be available for all new contacts (entered after Donor Search goes live on March 22nd) ; all Donor Profile information will be available for all contacts at \$0.10 per record (for Launch Level) or \$0.05 per record (for Take Off Level). Users are only charged if they opt to populate this data to contact records. Users have the ability to populate data only for new contacts entered since the last Donor Search scan was run. No fees associated with the Donor Search integration.

AND, not only will you be able to see the Donor Search wealth information in contact records, you will also be able to filter and report on this information in Advanced Search AND in reports. **No other system on the market allows users to do reporting on wealth profiles in this way!**

View Contact Details Fund... x

https://crm.fundly.com/ContactManagement/Individual/Details/#/view/409561/82b55dda-5b17-431b-9035-6797cde15c0a

Search

Country:

Other Criteria

Match

All of the following rules

- Select Criteria---
- Select Operator---
- TB Expiration Date
- Newsletter Information
- Unsubscribe Date
- Recurring Profile
- Active Recurring Profile
- Next Recurrence Date
- Recurring Amount
- Remaining Number of Payments
- Start Date
- Number of Payments Till Date
- Wealth Information
- 990F Flag
- Aggregate Arts Giving
- Aggregate Charitable Giving
- Aggregate DEM Giving
- Aggregate Education Giving
- Aggregate Giving For Religion
- Aggregate Giving In Higher Education
- Aggregate Healthcare Giving
- Aggregate Other Political Giving
- Aggregate Philanthropy And Grant Giving
- Aggregate Political Giving

Mr. Bix Williams ID - 602923 Last Visited On - 03/13/2017

Ayan Gandhi ID - 102112 Last Visited On - 03/13/2017

Chelsea Wolfe ID - 478813 Last Visited On - 03/10/2017

Hon. Mentok Mindtaker Esq. ID - 1010 Last Visited On - 03/10/2017

Jenny Whatever ID - 388091 Last Visited On - 03/09/2017

Ms. Aatmay B Sharma Sr ID - 102922 Last Visited On - 03/09/2017

Land O' Lakes ID - 606558 Last Visited On - 03/09/2017

Mr. Christopher A. Ten Jr. ID - 605515 Last Visited On - 03/09/2017

Search

Fundly CRM

https://crm.fundly.com/Reports/Enhanced/#/

Search

Enhanced

View All

_02 Donor Report

Contact

Active/Deceased

Address Line1

Address Line2

Address Line3

Address Line4

Amount Group

Amount Group Code

Appeal Count Since Last Response

Average Gift Amount

Average Gift Amount of Last 4 Gifts

Birth Date

City

Clients

Contact Created On

Contact ID

Contact Ledger Balance

Contact Name

Contact Source

ContactStageOfDevelopment

ContactStageOfDevelopmentID

Country

County

Critical Information

Donor Category Code

Donor Category Description

DonorFirstGiftCode

DonorLastGiftCode

DonorMaxGiftCode

DonorMaxGiftDate

DonorRecencyInDays

Email

EmailID

Employment Status

FamilyID

First Gift Amount

First Gift Date

Section

A B (Contact Name) C (City) D (Phone) E (State/Region (Province)) F (Donation Amount) G (Donation Date)

1 02 Donor Report

Report Categories

Select categories to include on report

Search...

- > Custom Data Sets
- > Donation
- > Event
- > File Import
- > Finance
- > Financial
- > Fundly Connect
- > Grant
- > Interaction
- > Internal
- > Internal Test
- > Internal Use
- > Internal Use
- > Internal Use
- > Membership
- > Public
- > Reach
- > Security
- > Wealth Information
- > Summary

Suppress Duplicates

Suppress Duplicates	Contact	Category Name
<input type="checkbox"/>	Contact	
<input type="checkbox"/>	Donation	

OK Cancel

Are you excited? We know we are!



Look for our newsletter on March 22nd detailing everything that Donor Search can do for you and how to use this new feature! We'll also be holding a webinar/training on this new feature on Tuesday, April 4th at 11:00 am PST. Go to fundlyevent.com to register.

Still Using Version 1 of Fundly CRM?

FUNDLY CRM ver 1.34

Activity Calendar | Contacts | Donation Management | Membership Management | Volunteer Management | Events | Communications | Configuration | Other Stuff | Reports | Mail

Donations

Donation Summary

Total Donors:	135
Individual Donors:	127
Organization Donors:	8
Total Donations:	\$249,893.08
Total Donations:	\$28,912.00
Overall Total Donation:	\$278,805.08

Donation Types (Current Month)

Gift	\$161.00
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Donor Leaderboard (Current Month)

Ajrun Metzler	\$100.00
Bob Plumb	\$50.00
Cecilia Ossenbeck	\$11.00

Memberships

Total Memberships:	9
Individual:	1
Family:	1
Lifetime:	6
Standard:	1

Membership Renewals (Expiring)

Bobby Socks	Family	1/31/2017
Jane Doe	Family	1/31/2017

Upgrade to Fundly CRM version 2!

Dashboard Fundly CRM

crm.fundly.com/Dashboard/Client#

Currency: USD

Tasks: 116

Dashboard - As of 01/11/2017 12:00 AM Pacific Standard Time

663 Total Contacts	649 Total Active Contacts	566 Total Individual Contacts	83 Total Organization Contacts
218 Total Individual Donors	33 Total Organization Donors	58 Total Active Membership	60 Total Individual Members
7 Total Organization Members	50,001 Contact Limit		

Total Donors Trend Summary

Line chart showing values for 2015, 2016, and 2017 from Jan to Dec.

Membership Trend Chart

Line chart showing values for 2015, 2016, and 2017 from Jan to Dec.

Membership Trend Summary | Donor Recency Chart | Configure Dashboard

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.

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).

