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:

- Donor Search
- Getting Started Webinar
- Reporting Huddle Survey

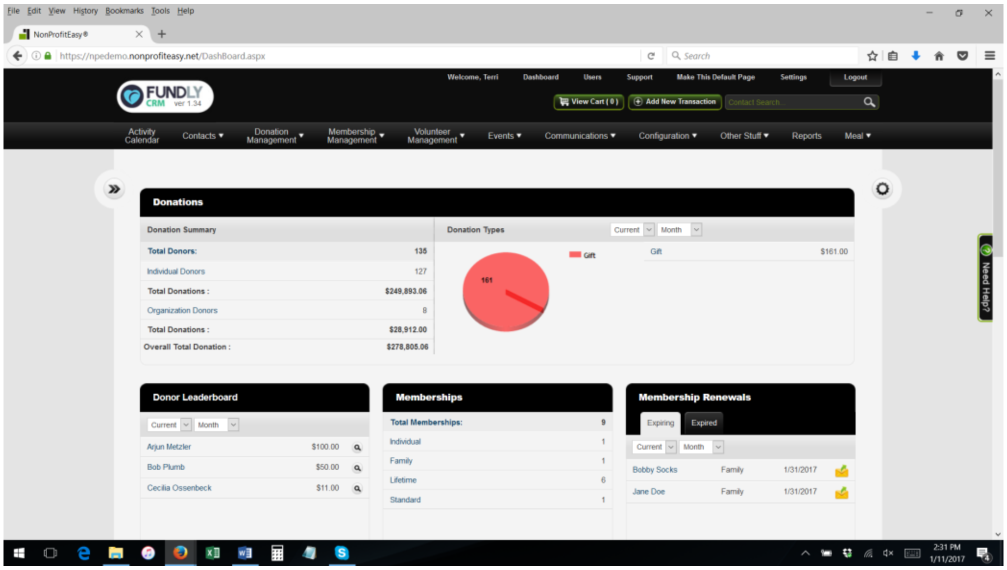
Connect:

- Reporting Huddle Survey
- (don't worry Connect folks - we will have a newsletter full of Connect updates later this week!)

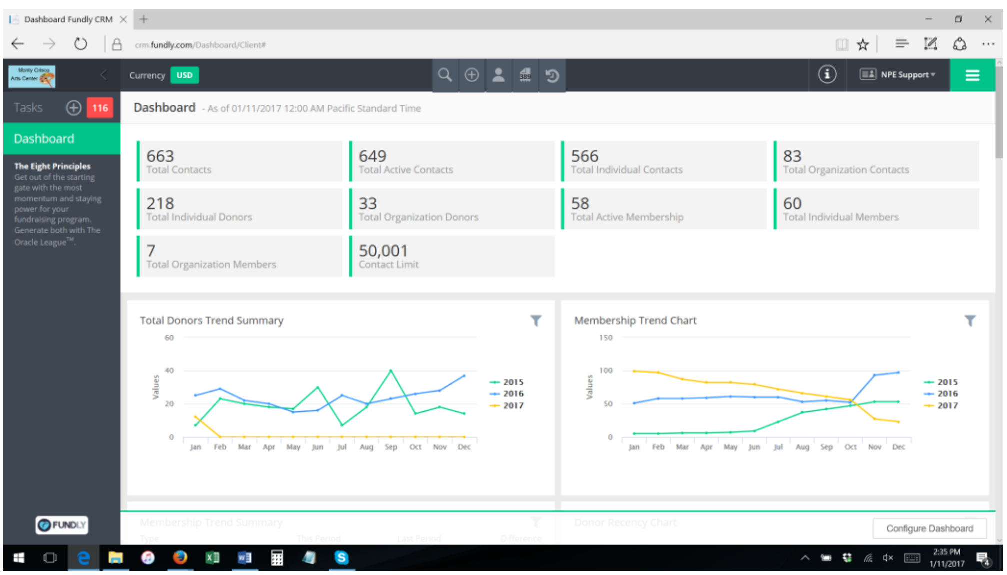
Read on for all the details!
(if images are not displaying correctly in this email, you can find a copy of this newsletter in our Connect and CRM v2 Support Libraries)

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!

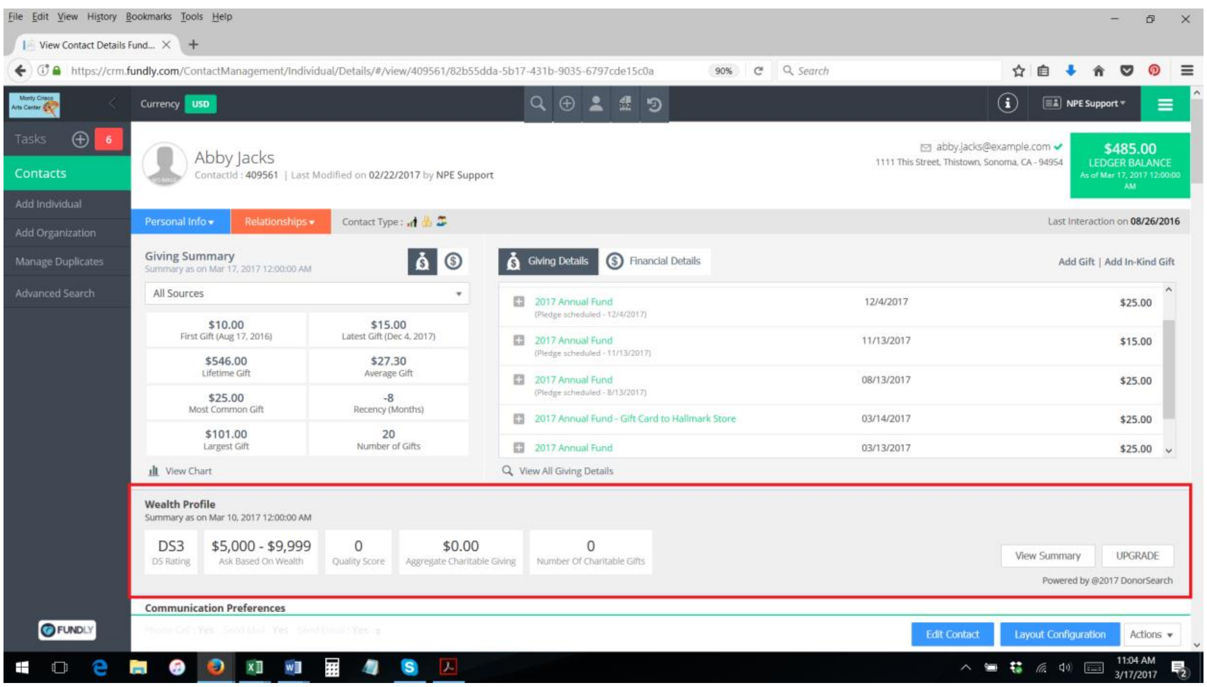


If you're still using Version 1 of Fundly CRM, we encourage you to check out all the great features that Version 2 offers. We hold a "Getting Started w/Fundly CRM v2" webinar every Monday at 11:00 am PST that provides an overview of all that the new version of Fundly CRM has to offer. For more information,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

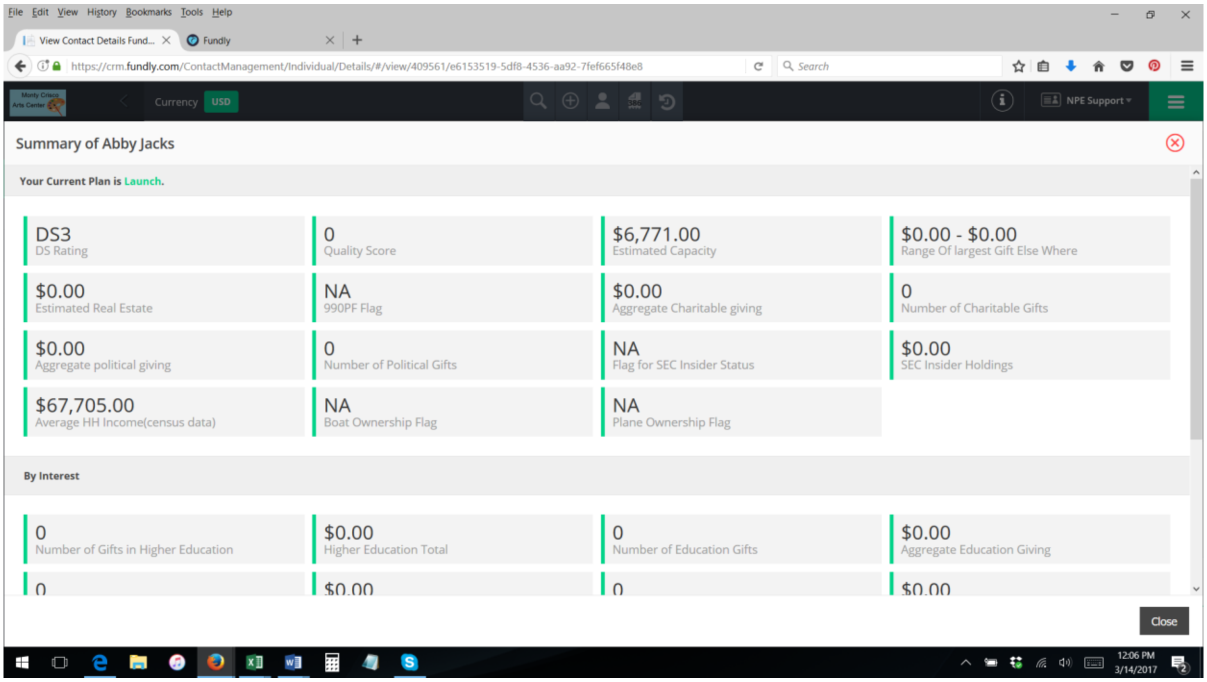
FUNDLY CRM Donor Search

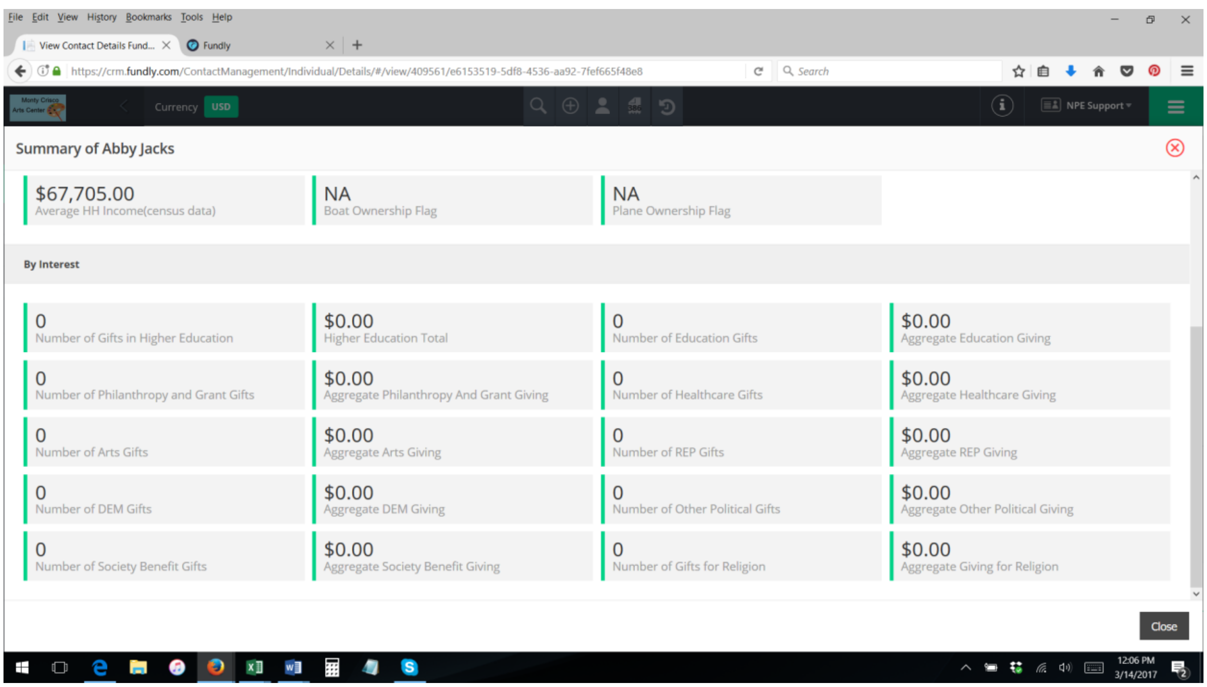
We are incredibly excited to announce the release of our new Donor Search Integration! Donor Search is a leading provider of wealth and philanthropic screening services, providing users with information on contacts' past giving history and net worth - information critical to successful fundraising asks.

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



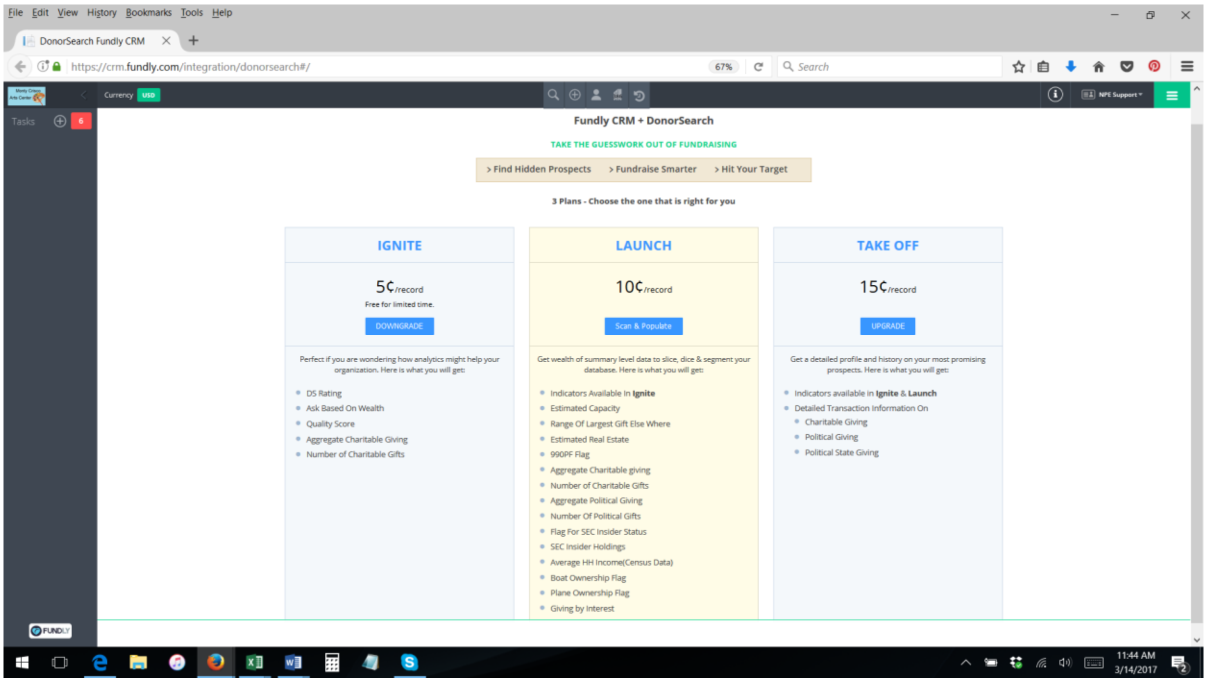
Donor Search information helps you prospect better, by helping you to target an appropriate ask to your existing contacts - no more shooting in the dark! The Donor Search database pulls information from over 25 different sources and compiles it in one place for you. See your contacts' estimated household income, charitable giving capacity (10% of net worth), and past charitable and political giving history, as well as a breakdown of their charitable gifts by topical area (education, religion, arts, healthcare, and societal benefit).



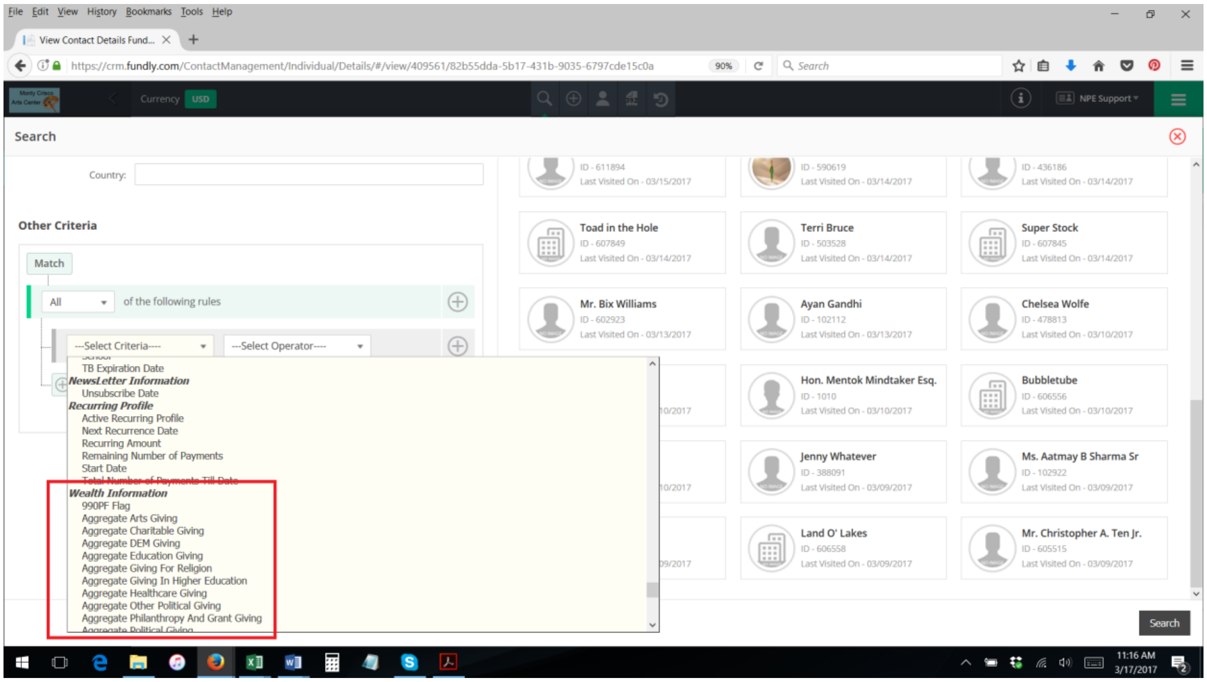


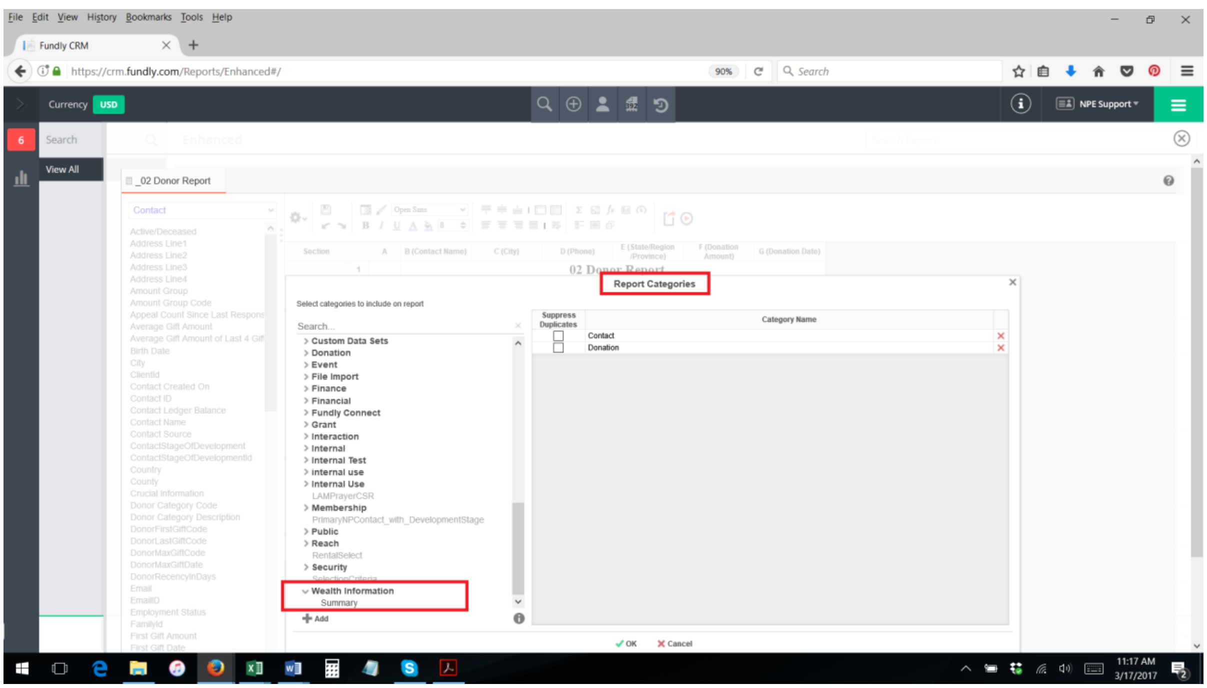
Donor Search is a "pay per use" service, which means you only pay for the records you "scan" (attempt to match to the Donor Search database and populate with Donor Search Wealth Information). There is no subscription fee and the Donor Search feature is available to all Fundly CRM v2 clients/subscription levels!

There are three tiers of information available and the per record cost varies by tier. As of today (March 22nd), the Ignite Level data has been populated for all contact records currently within your CRM (for clients who have logged in to their CRM within the last 30 days) that have a full mailing address (our gift to you!). You should be able to access this information immediately. Users will have to pay to populate Donor Search information to new contacts (added after March 21st) and to upgrade contacts' Wealth Profiles to the Launch or Take Off levels.

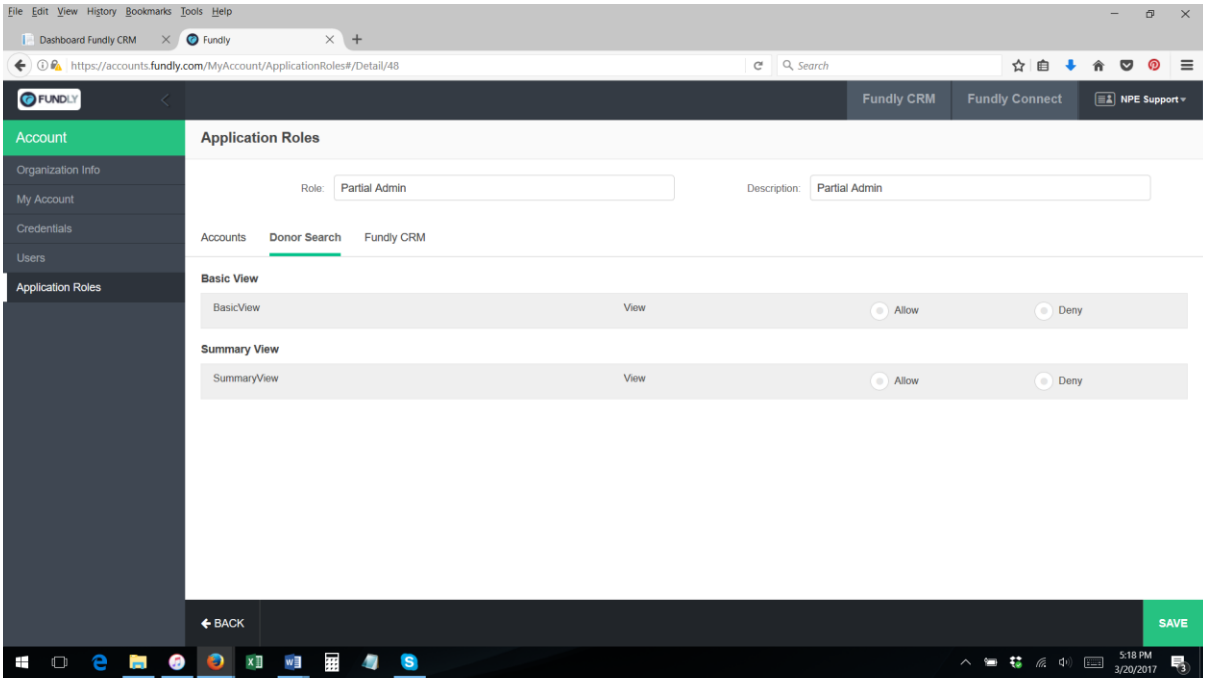


You can even search and report on Wealth Information! So you can, for example, search for contacts who have a Wealth Profile or search for contacts who have previously given to a particular topical area. You could also, for example, write a report comparing your donors' average amount donated to your organization compared to their Wealth Profile Charitable Giving Capacity.





Be default, only CRM system administrators have access to the Donor Search Wealth Profile Information. Other users can be given access to this information in your User Roles/Permission Settings area.



We know you're eager to start using the new Donor Search integration so we've prepared several tutorials for you on how to use it (Donor Search Tutorials can be found in the "Integrations" section of the Fundly CRM v2 Support Library):

- Donor Search Overview/Basics
- Donor Search: How to Add/Update Wealth Information to Contact Records
- Donor Search: How to Upgrade/Downgrade Your Subscription
- Donor Search: Definitions

We will also be holding a webinar on using Donor Search on April 4th. Go to fundlyevent.com to register.

FUNDLY CRM New Getting Started Webinar Recording

We've added a new/updated recording of our "Getting Started with Fundly CRM v2" webinar to the Support Library. If you attended this webinar a while ago or started using Fundly CRM v2 last year (or are a new staff member who never received any formal training on Fundly CRM v2), we encourage you to listen to the recording or to attend one of our weekly "Getting Started" webinars (Mondays at 11:00 am PST - go to fundlyevent.com to register). We are constantly adding new features to the system, and the Getting Started webinar provides a quick overview of all that Fundly

CRM v2 has to offer.

FUNDLY CRM & FUNDLY CONNECT Reporting Huddle

We offer a live reporting help session called the "Report Huddle." Currently, the Report Huddle is Mondays at 12:30 pm PST. We're thinking of moving it to another day/time, and we'd like your input as to when would be the most convenient day/time to attend. Please take a moment to take this short (two question) survey to help us find the best time to offer this session, just click the image below to get started!

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).

If you enjoy Fundly CRM and/or Fundly Connect, please consider providing us with a review or testimonial. Contact us at support@fundly.com for more information!
