



Great New Things From Fundly CRM & Connect...

Our Best New Features for You!

Today, we have released several new features for Fundly Connect that we think you're going to really enjoy, and we have several updates on Fundly CRM as well (we had so many updates and such much big news this week, we couldn't squeeze it all into one newsletter, so you get two New Release newsletters this week)!

Want to learn more about all the recent changes to Fundly Connect? We'll be holding a "Fundly Connect New Features Overview" webinar on Thursday, March 29th at 12:00 pm PST and again on Wednesday, April 5th at 12:00 pm PST (it's the same session repeated, so you only need to attend one). You can [register for these sessions at fundlyevent.com](https://fundlyevent.com). And don't forget - we'll be holding a webinar on our new Donor Search integration on Tuesday, April 4th at 11:00 am PST as well (you can [register for that at fundlyevent.com](https://fundlyevent.com) as well)!

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Connect:

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- 'Submit Application' Step Skipped When Applying for an Opportunity

CRM & Connect:

- Reporting Huddle Changes for April

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.



Kula Integration - Need Beta Testers

Kula is a way for consumers to support nonprofits that they love while shopping for great products and services. We're exploring a potential partnership with them, and **we're looking for FIVE (5) CRM v2 clients before the end of this month (3/31) to take it for a spin and provide feedback.** If you'd like to volunteer to be a beta tester of this exciting opportunity, please email us at support@fundly.com.



Coming Soon News...

We've got a LOT of exciting changes coming soon to Fundly CRM v2. Our next major build/release is planned for April 3rd, which will include:

- Changes to the Contact Import Utility including adding the ability to import contacts without Zip Code (which is currently required)
- Changes to the Online Membership Directory (controlled/managed from Main Menu: Pages), including the ability to Members to Opt In/Out of the directory and adding the ability to control which Membership Levels are added to the Directory

- Adding logic to automatically delete any Household Salutation from contact records when the spouse/partner is marked deceased

As always, we'll detail all these changes in a New Release Newsletter the day of release. You can [sign up for our New Release and other newsletters at fundlyevent.com](#) (newsletter sign up on the left hand side of the screen).



Team Time Off (formerly known as Vacation)

Team Captains and Admins can schedule 'Time Offs' (formerly known as 'Vacation') for their teams. We have decided to change the label because "Time Off" is more general -- which can include vacations, on hold, etc. Volunteering schedules that fall on the time off dates are removed from the team and its members' schedules, which in turn makes the schedule open.

We have uploaded a tutorial on this new feature on our Support Library (<https://support.fundly.com/hc/en-us/articles/115004916488-Team-Time-Off>) which will cover:

- Configuring Types of Time Off
 - Scheduling Time Off for a Team
 - Viewing Teams' Time Offs
 - Cancelling Scheduled Time Off
-



Deleting Future Occurrences

Have you noticed a new 'Delete Future Occurrence' option when editing a schedule? We have added this option to differentiate it from the other 'Delete' option.

Previously, it was not possible to delete the entire schedule because hours may be logged for past dates. Now, we have labelled this option as 'Delete Future Occurrence' which can only delete future dates.

On the other hand, the 'Delete' option will now remove the entire schedule, including the past dates.

View Schedule ⊗

1 Record(s) Found

Venue	Shift	Position	Verified Hours	Unverified Hours	
Location 1	Unlimited Volunteers	Volunteer	0	0	<input type="button" value="Edit"/>

Occurs on selected dates

However, if hours were already logged for past dates on that schedule, it will display a 'Confirm Delete' window where you'll have to check the details to be deleted. This action also cannot be undone.

Confirm Delete ⊗

This action cannot be undone. This will delete the selected schedule and any hours tied to it permanently.

*Please check the boxes below to confirm delete

- Selected schedule and associated hours will be deleted
- All associated Verified Hours will be deleted [Total Verified Hours: 4]
- All associated Unverified Hours will be deleted

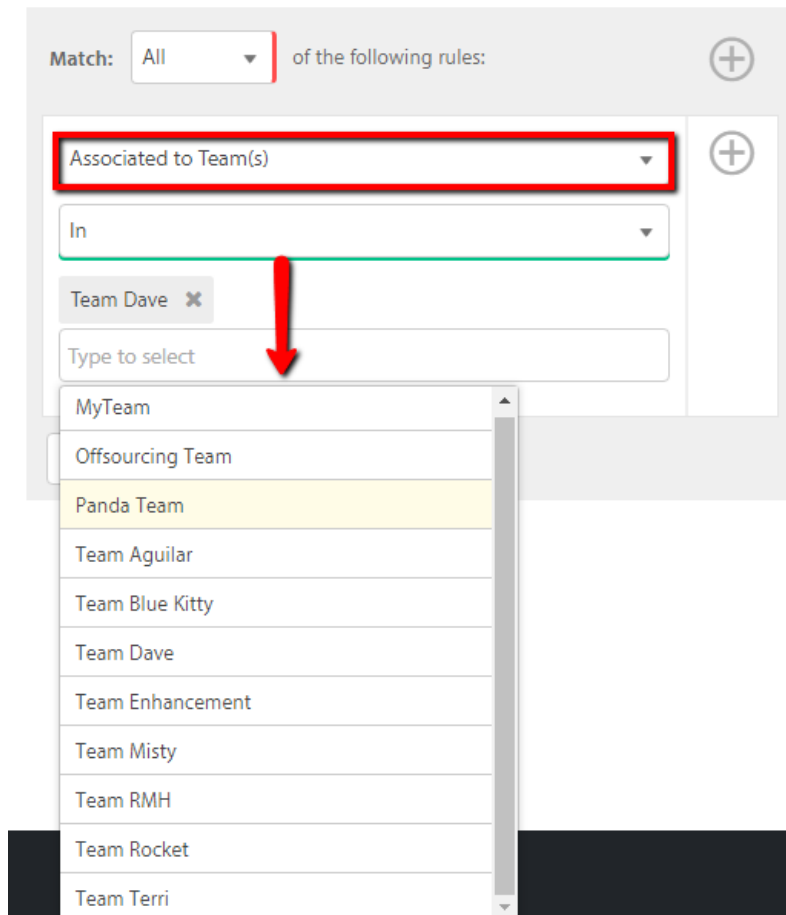
Please type **DELETE** to permanently delete all selected data.

Are you sure you want to delete this schedule?

 **Ability to Send Email to Team and Members**

Do you want to send an email to teams and their members? Now that's possible with our new 'Search Criteria', which will allow you to filter volunteer records that are associated with a particular team.

Just complete an Advanced Search and select “Associated to Team(s)” as the criteria. Next, select the team(s) you want to send the email and hit Search.



The screenshot shows an advanced search interface. At the top, it says "Match: All of the following rules:". Below this, there is a dropdown menu with "Associated to Team(s)" selected, highlighted by a red box. Underneath, there is a dropdown menu with "In" selected. A red arrow points from the "Associated to Team(s)" dropdown to a search input field containing "Team Dave". Below the input field is a list of team names: MyTeam, Outsourcing Team, Panda Team (highlighted in yellow), Team Aguilar, Team Blue Kitty, Team Dave, Team Enhancement, Team Misty, Team RMH, Team Rocket, and Team Terri.

The Search page will display all associated member(s) for the team(s) selected as criteria. From this search, you can now select to ‘Send Email’ to All Search Results.

Volunteers / Teams Search

Search Results based on

Select current screen **3 Record(s) Found**

Volunteer/Team Name	Username	PIN	Background Check Status	Tag(s)
<input type="checkbox"/> Barbie Roberts Email : kjqaguilar@gmail.com Send Email: Yes Mobile Phone : (123) 141-4 Address : Street 1, Rohnert Park, Sonoma, CA, US - 94928 Joining Date : 6/13/2016	kjqaguilar	B000002280		Volunteer Coordinator <input type="button" value="Edit"/>
<input type="checkbox"/> Cash Aguilar Email : kjqaguilar@gmail.com Send Email: Yes Address : Street 1, Rohnert Park, Sonoma, CA, US - 94928 Joining Date : 10/25/2016	casscass	B000000040		Volunteer Coordinator <input type="button" value="Edit"/>
<input type="checkbox"/> Emma Watson Email : acassie106@gmail.com Send Email: No Mobile Phone : (012) 345-6789 Address : Street 1, Rohnert Park, Sonoma, CA, US - 94928 Joining Date : 6/22/2016	emmawatson	B000002638		Volunteer Coordinator <input type="button" value="Edit"/>

- Export
- Communicate
- Send Email
- Background Check
- Assign Tag(s)

SELECTED VOLUNTEERS/TEAMS ▼
ALL SEARCH RESULTS ▼
ADD NEW VOLUNTEER



Add Team Association from Volunteer Profile

We know you're going to love this next new feature...

It is now possible to associate a volunteer to a team when adding or editing a volunteer record. You will find the 'Associated Team(s)' section on the volunteer edit page wherein you can select which team(s) in your database to associate with the volunteer. Yay!!!

First Name:

Last Name:

Suffix:

Address Line1:

Address Line2:

Address Line3:

Address Line4:

Country: Zip:

City:

State:

Gender:

Birth Date:

Nick Name:

Joining Date:

ADD / REMOVE TAG(S)

Causes

Associated Team(s)

Team Rocket

- Team Aguilar
- Team Dave
- Team Blue Kitty
- Team Terri
- Team Enhancement
- Team RMH
- Team Rocket



Description on Option to Make Team Public/Private

Team Captains will now see a description for the Public/Private option on their Team Dashboard. This will clearly define if team is made private or public.

My Team Dashboard MyTeam

Summary	Team Type	Team Co-Captain
5 Hours Logged	General	NA <input type="button" value="Change"/>
3 Opportunities Worked/Scheduled	Team Captain Details	Allow Volunteer(s) to
9 Members	Emma Watson <input type="button" value="Change"/>	Note: Making this Public on the website.
2 Team Member(s) Pending Approval	✉ acassie106@gmail.com	Member Approval R
	☎ (012) 345-6789	

 **Separate Count for Total Number of Volunteers**

It was difficult to tell the exact number of volunteers when filtering the volunteers scheduled for an opportunity because records count a team as 1.

This time, we have added a 'Volunteer Count' when managing volunteers for an opportunity. The count will consider the number of members assigned by the team to the opportunity.

Manage Volunteers - Park Cleanup

Search Location 1 From Date To Date

Select current screen 44 Volunteers | 37 Record(s) Found

Name	Next Step	Hours Volunteered	Unverified Hours	
<input checked="" type="checkbox"/> Team Aguilar	Log Hours	2	0	<input type="button" value="Remove Team"/>
Application Type: Team (2)				
<input checked="" type="checkbox"/> Team Rocket	Log Hours	0	0	<input type="button" value="Remove Team"/>
Application Type: Team (5) ✉ acassie101+team@gmail.com Send Email: Yes				
<input checked="" type="checkbox"/> Offsourcing Team	Log Hours	0	0	<input type="button" value="Remove Team"/>
Application Type: Team (3) ✉ acassie108+team@gmail.com Send Email: Yes				
<input checked="" type="checkbox"/> Aaron Carter	Log Hours	3	0	<input type="button" value="Remove Volunteer"/>
Application Type: Individual				
<input checked="" type="checkbox"/> Adriane Angayan	Log Hours	6	0	<input type="button" value="Remove Volunteer"/>
Application Type: Individual ☎ 222222222222 ✉ adriane.angayan+MOW@fundly.com Send Email: No				



Select Current Screen When Managing Volunteers for an Opportunity

Want an easier way to select all of the Volunteers displayed on the screen? You will now see a 'Select Current Screen' checkbox at the top left corner of the page when managing volunteers for an opportunity.

The screenshot shows the 'Manage Volunteers' interface for a 'Park Cleanup' opportunity. At the top left, there is a checkbox labeled 'Select current screen' which is checked and highlighted with a red arrow. The interface includes a search bar, filters for location, shift, and date, and a table of volunteer teams. The table has columns for Name, Next Step, Hours Volunteered, and Unverified Hours. At the bottom, there are buttons for 'BACK', 'SELECTED VOLUNTEERS/TEAMS', 'ALL SEARCH RESULTS', and 'ASSIGN VOLUNTEER'.

Name	Next Step	Hours Volunteered	Unverified Hours
Team Dave	Log Hours	6	0
Team Aguilar	Log Hours	2	0
MyTeam	Scheduling	0	0
Panda Team	Log Hours	0	0
Team Rocket	Log Hours	0	0

This selects all the volunteer records that are loaded on the screen. If you are still on the first page, then it selects only the first 15 records. As you scroll to the bottom, the loaded list gets automatically selected.



Option to Prevent Users from Changing the Time When Scheduling

Volunteers sometimes opt not to schedule for the exact time of the opportunity. Now, admins can

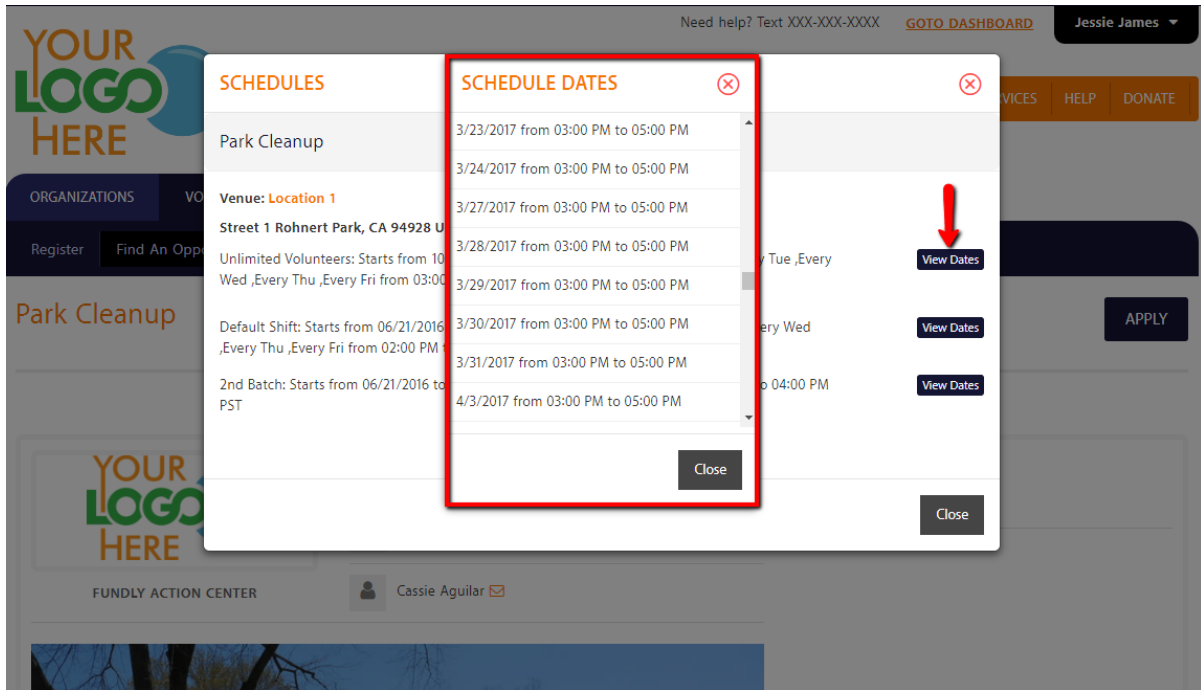
disable this and prevent users from changing the time when scheduling.

Volunteer can schedule for this opportunity	<input checked="" type="checkbox"/>
Display on Public Calendar	<input checked="" type="checkbox"/>
Volunteer can select/change time	<input checked="" type="checkbox"/>
Volunteer can log hours for this opportunity	<input checked="" type="checkbox"/>
Auto Log Hours When Marked As Attended	<input checked="" type="checkbox"/>
Approval required for volunteer application	<input type="checkbox"/>
Background check required for Volunteer?	<input type="checkbox"/>
Orientation and/or training is required before volunteer can work	<input type="checkbox"/>



View Dates for Opportunity Schedules on the Public Site

When volunteers are viewing the schedules of an opportunity on the public site, they will now be able to also view the upcoming dates of that schedule. This will help them view the future dates for which they can schedule.



'Submit Application' Step Skipped When Applying for Opportunities

Some opportunities do not have any attached application form or do not require approval of volunteers from the organization. In these cases, we have changed the volunteer sign-up flow so that the system submits the volunteer sign up right after they click 'Apply' and directs the volunteer into Scheduling. This skips the step to confirm submission of the application to eliminate any unnecessary steps in the flow.

Basic by Mayur 2

Spots Remaining: **UNLIMITED**

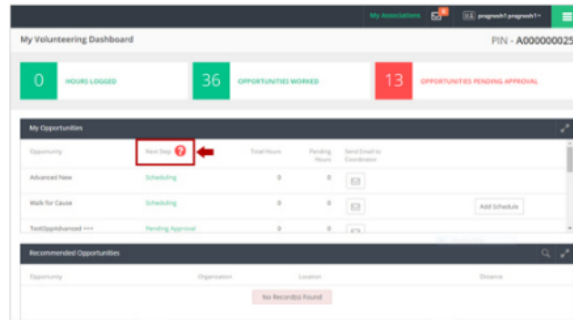
1

View

2

Submit Application

Your application to # Basic by Mayur 2 has been submitted. Please go to your dashboard to schedule for the opportunity or view the "Next Step" as shown below:



BACK TO SEARCH

GO TO DASHBOARD



Reporting Huddle Changes for April

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!



In addition, for April we're going to try something a little different in the Report Huddle; we're going to focus each session on a particular reporting area: contacts, donations, events, or volunteers. Each session will focus on real life examples of various types of reports users might try to create. These sessions will be interactive, hands on learning. Bring your questions! (for April, we've also moved the Report Huddle to Thursdays).

April 5th - Contact Reports

- a) How to build a contact report that contains no duplicates/with every contact listed only once
- b) How to filter a report by Contact Type or Contact Tag (and how to get types and tags to show up on one line in a report)
- c) How to group a report by Household and How to create a salutation field that pulls either the household or individual salutation based on if the contact is an individual or a household
- d) How to pull an organizational report that includes Org Primary Contact information

April 12th - Donation Reports

- a) How to report on tribute gifts/include tribute name on a report
- b) How to report on/identify recurring donations in a report
- c) How to add sub-totals/totals (per donor, per fund, per campaign, per program, etc.) to a report
- d) How to get a report with no duplicate names (donor mailing list report)

April 17th - Event Reports

- a) How to report on registration form fields/attendees
- b) How to report on just one instance of a repeating event
- c) How to exclude cancelled/voided registrations
- d) How to get a count and a unique count of event attendees on reports

April 24th - Volunteer Reports

- a) How to get a list of volunteers assigned to a particular opportunity
- b) How to combine volunteer data with other kinds of report data within CRM reporting
- c) How to get a list of volunteers with no duplicates/repeat of names
- d) How to get a sub-total/total for # of hours volunteers (per opportunity, per volunteer, etc.)

You can see up for these sessions (as well as all of our other webinars) at fundlyevent.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).

If you enjoy Fundly CRM and/or Fundly Connect, please consider leaving a review on Capterra.com. To Leave us a review [Click Here](#).

If you would also allow us to post a quote from you along with a headshot on our website, please contact us at support@fundly.com.

