



## Great New Things From Fundly CRM...

### Our Best New Features for You!

Today, we have released A WHOLE LOT of new features for Fundly CRM that we think you're going to really enjoy! Read on for all the details.

#### CRM:

- Fundly CRM Named to Top Ten CRMs
- Free Email Accounts and Blacklisting
- Ujoin Advocacy Integration
- Membership Directory Changes
- Pages/Morweb/Plug-Ins Internal Notifications Moved
- Import Utility Updates
- Kula Integration - We Need Beta Testers!
- New Webinar Recordings Adding to Support Library
- Coming Soon - Pay Offline for Online Transactions!

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).***



## Fundly CRM Makes Top Ten List



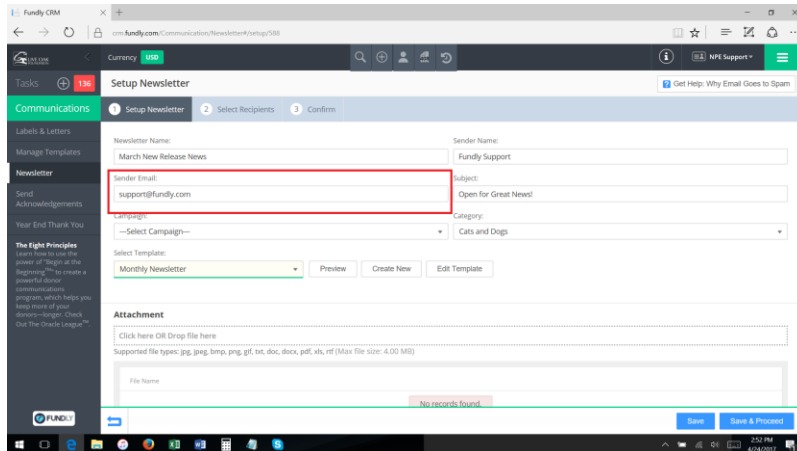
Fundly CRM made NTen's and Idealware's list of Top Ten Best Donor Management Systems! We're pretty excited to be part of such a select group. You can read the full report at: <http://www.idealware.org/reports/consumers-guide-low-cost-donor-management-systems/>

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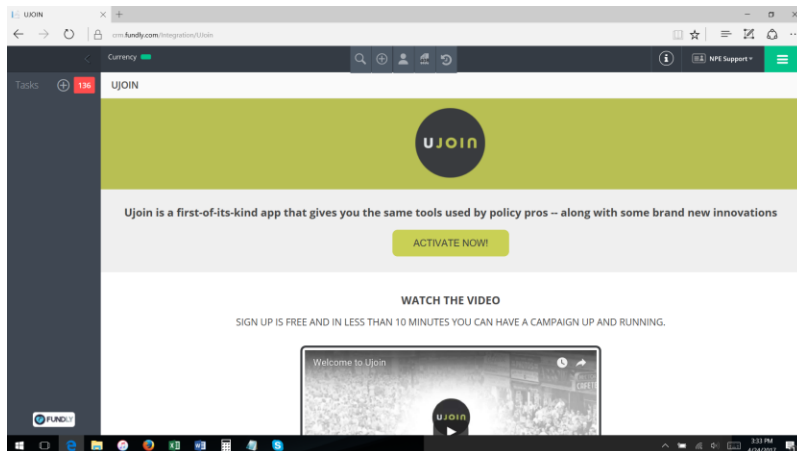
## Free Email Accounts and Blacklisting

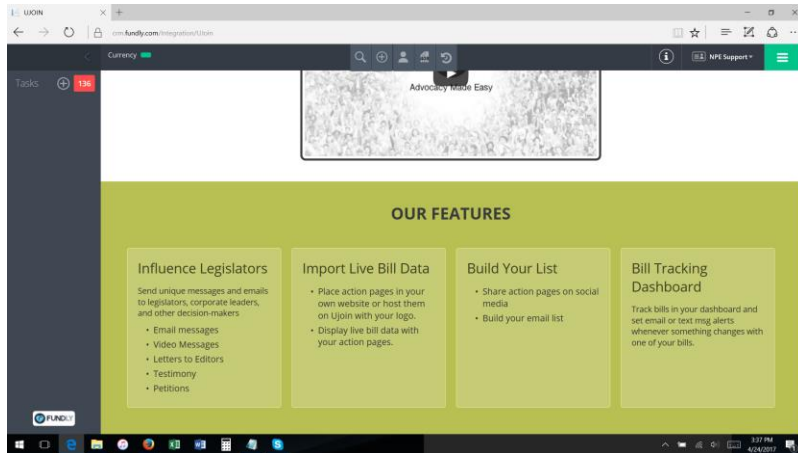
Recently, many free web email domains like aol.com, yahoo.com, mac.com, rocketmail.com, ymail.com, and .ru have updated their email protocols to be more strict about bulk email marketing. Their policies prevent spam and email scams, but it means that mail sent through an email service provider like Fundly CRM's newsletter feature with a "from"/sender email address from one of those free domains will be rejected by most receiving servers. We are working on a system fix for this issue. In the meantime, to avoid having your bulk emails rejected, you must change your "from"/sender address to one that is not with a free email company." For example, if you usually use something like "admin@gmail.com" as your sender email address for your newsletter, you will need to use another email address that is not through a free provider.



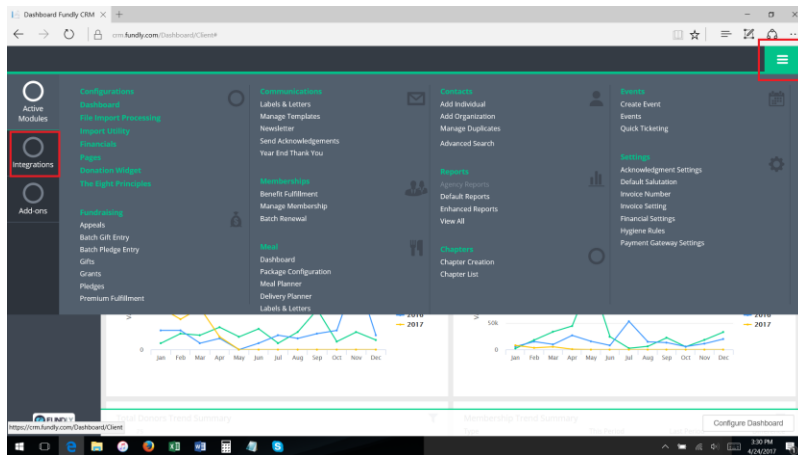
## New Integration with Ujoin

We're really excited about this one! We've launched a new integration between Fundly CRM v2 and Ujoin - one of the leading grassroots advocacy platforms, which allows users to create action for change by creating petitions, sharing information on causes, integrating live bill data, expressing opinions to their legislators (including through video messages!), and using email communications to galvanize supporters to action. Through the integration, contacts added via Ujoin will be added to Fundly CRM along with basic information on the petitions they have signed and other actions they have taken within Ujoin! There is no additional charge to add the integration (beyond the Ujoin monthly subscription fee).

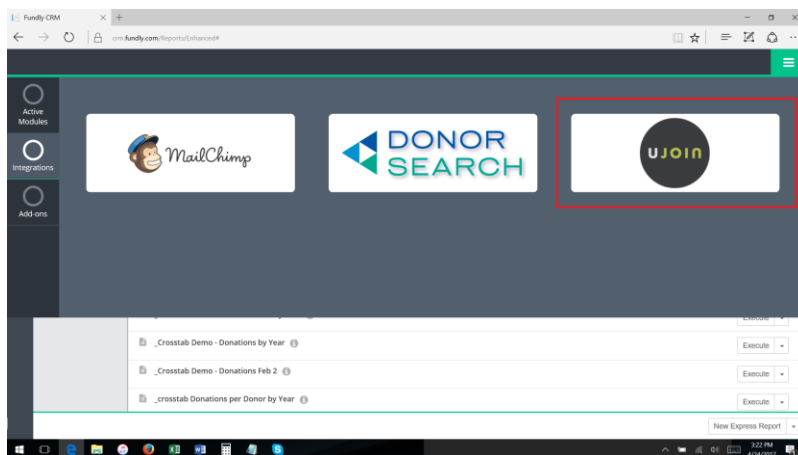




To activate the Ujoin integration, from the Fundly CRM Main Menu, select Integrations



Then select Ujoin

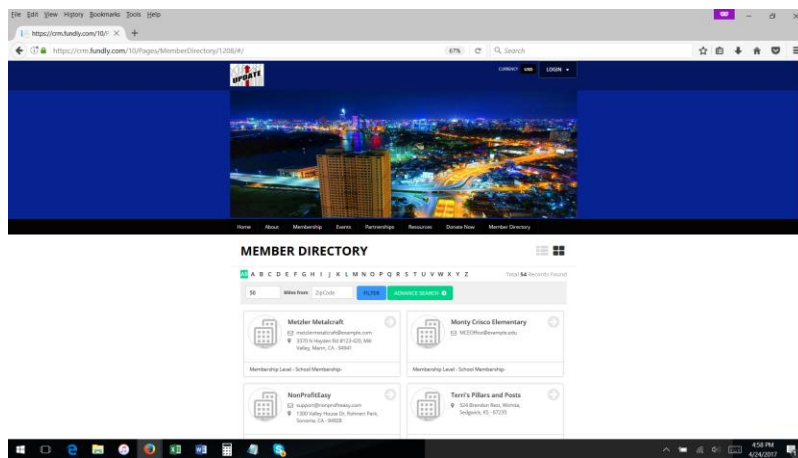


We have a full tutorial on how to use the Ujoin integration in our support library at: <https://support.fundly.com/hc/en-us/articles/115006056567>

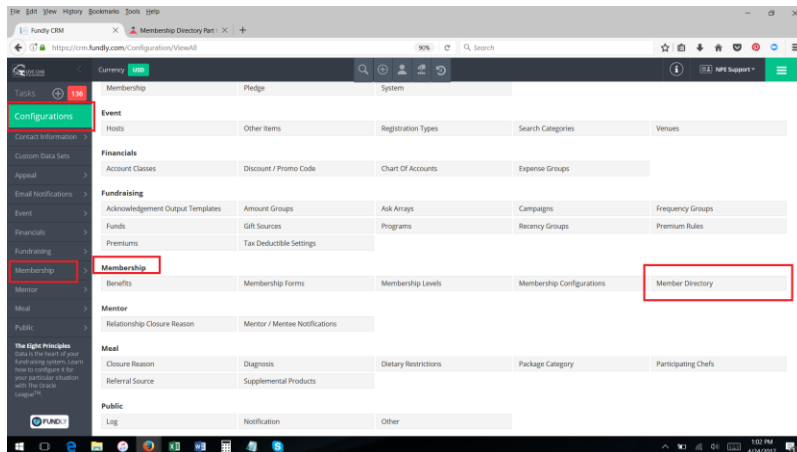
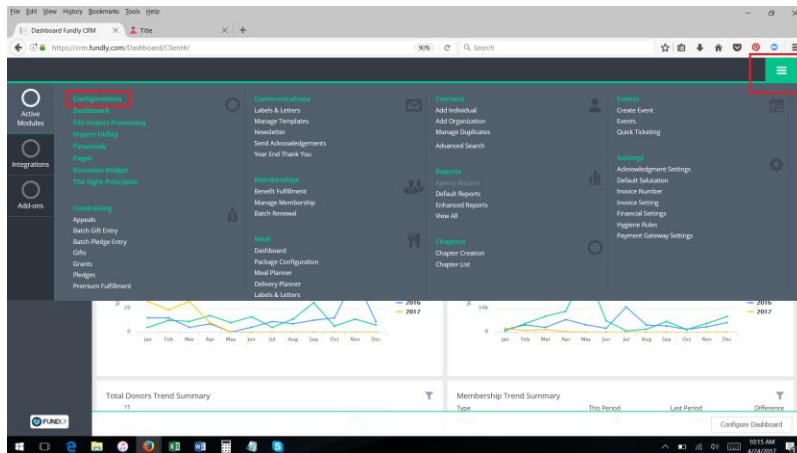
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## **Member Directory Changes**

Many users don't realize that Fundly CRM comes with the option to enable a public Member Directory (if they use Pages or the WordPress Plug-In) that allows visitors to your website to view basic information on your members. This is great for professional networking or to help members of the public find those who offer professional services such as lawyers, counselors, mediators, consultants, and trainers. We've released a number of updates to the Member Directory, including adding the ability for members to Opt In or Opt Out, expanded the fields that are available to be viewed by the public, and have added the ability to have data from custom data sets viewable on the Directory page.



We've also moved where the Directory's configurations and management settings are located. Previously, the Directory was managed from the "Pages" area of your Main Menu. Now, you'll find the Directory under the Membership section of Configurations.



We've added several tutorials to the support library on the Member Directory to help you make the most of this great feature:

[Member Directory Part I: Configuring the Member Directory](#)

[Member Directory Part II: Manage Member Directory](#)

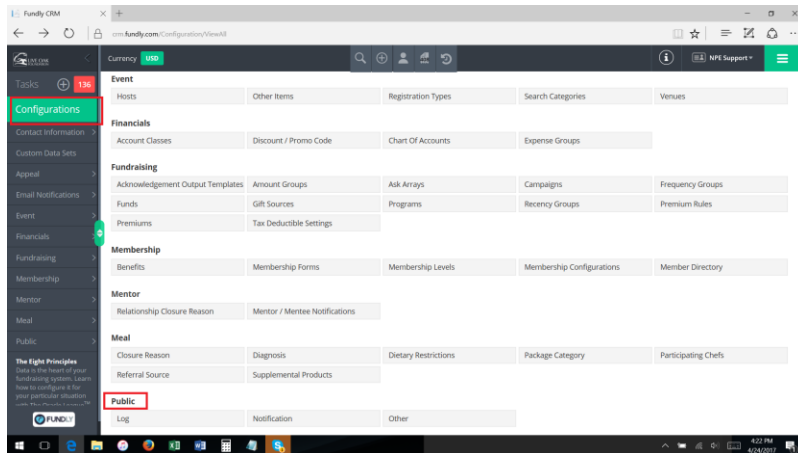
[Pages: Membership - Add the Member Directory to Your Website](#)



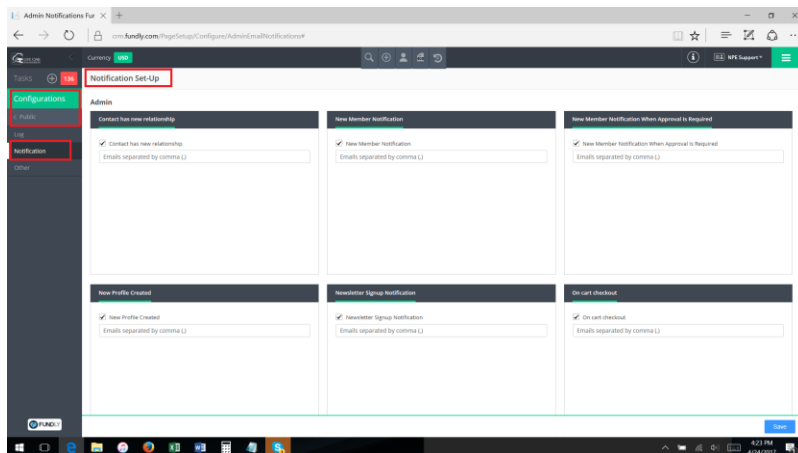
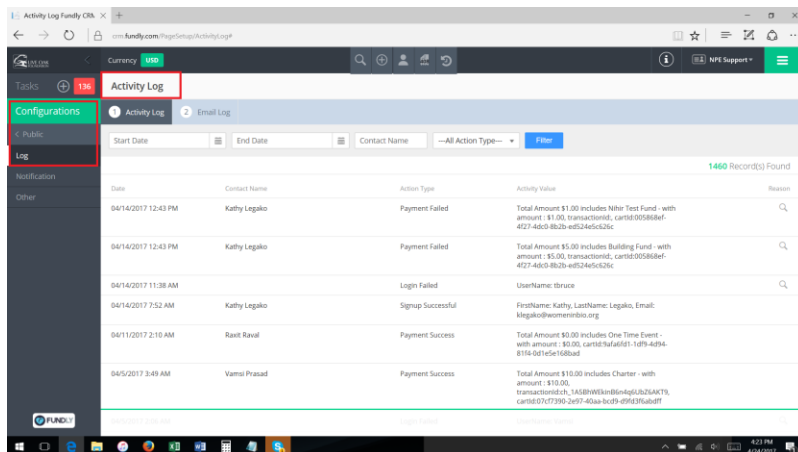
## Pages/Plug-Ins/Morweb Internal Notifications Moved

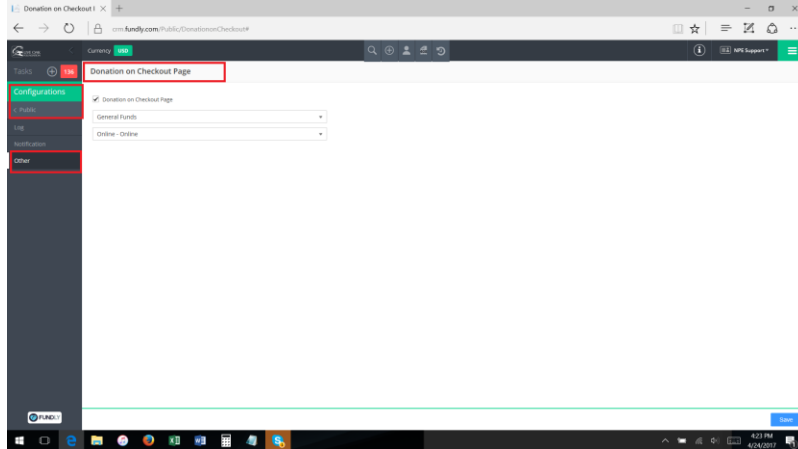
Previously, configurations for internal notifications triggered by online transactions via Pages, Morweb, or a WordPress Plug-In were managed via the Pages area of the main menu. In addition, it was through the Pages link on the Main Menu that users could access the public portal log to find information on failed log in attempts and access users' public profile passwords. As part of our effort to streamline the User Interface, we've moved the management of these notifications and the log to

the Configurations menu, as all other email notifications are managed from there as well.



You can now find the screen where you set who on your staff should be notified when someone creates a new user profile, signs up for your newsletter, or completes a transaction on your website under the Public section of Configurations.





These changes come ahead of a slew of changes that will be coming next month to Invoices and Communications (see the Coming Soon information below for more information), so look for more changes to the UI coming next month as we work to consolidate similar functions together for easier access.

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## **Import Utility Changes**

We've made a few additional tweaks to the Import Utility this month, the big one being that now only Zip Code is required for address import (previously Zip Code AND Address Line 1 were both required). If you include City, State, AND Country, the system will look up and populate the Zip Code to the contact's record for you. However, please keep in mind a few things:

1. If using Zip Code only, the system assumes the country is U.S. and will populate U.S. to the country
2. Zip Code look up for City, State, and Country included ONLY works for U.S. Zip Codes. This does not work for non-U.S. Zip Codes
3. Inside of the CRM, Address Line 1 and Zip Code are both still required. If you import Zip Code only, the next time you edit that contact's record, you will not be able to save it without entering something into Address Line 1 (you can add "dummy" data such as a period or "unknown" or something like that to get around this if need be).

As always, when using the Import Utility, please make sure you download and use the latest template from the support library before proceeding, as the template contains all of the latest instructions and fields needed for a successful import.

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## Kula Integration - Need Beta Testers

Kula.com is a way for consumers to support nonprofits that they love while shopping for great products and services. Kula is an online mall, with a percent of each user's spending donated back to the nonprofit of their choice. We're exploring a potential partnership with them, and **we're looking for FIVE (5) CRM v2 clients to take it for a spin and provide feedback**. This is a great opportunity to try a new fundraising technique to raise money for your organization. If you'd like to volunteer to be a beta tester of this exciting opportunity, please email us at [support@fundly.com](mailto:support@fundly.com).

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## New Webinar Recordings

We've added several webinar recordings to the support library including:

- [Keeping Your Data Clean and Updated](#)
- [Advanced Reporting - HTML Viewer, Table Joins, and More](#)
- [Working With Custom Data Sets](#)

We've also cleaned up the support library a bit - we've removed the separate Webinars folder and added the webinar recordings in with the module topics so that all the information for each module is contained in one area.

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## 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 Mid- to Late-May, which will include:

- Pay Offline feature for online transactions
- Changes to Invoice templates (including a blank one that can be completely configured by the user)
- Changes to Event Notifications

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](http://fundlyevent.com) (newsletter sign up on the left hand side of the screen).

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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).**

**If you enjoy Fundly CRM and/or Fundly Connect, please consider leaving a review on [Capterra.com](http://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](mailto:support@fundly.com).**