NonProfitEasy (Fundly CRM): Version 2 Improvements/Enhancements
May 2016

1. Fundraising
   a. Gifts
      i. New Gifts screen shows all gifts that have come into database, with search and filter functionality, status of payment and status of donation acknowledgement
   b. Source configuration customizable by user - allowing you to track specific methods of getting donations, pledges, grants
   c. Tributes - ability to send tribute cards
   d. Appeals
      i. Track expenses through Expense Groups
      ii. Track income as well as Return on Investment
      iii. Compare success of appeals to each other
   e. Pledges/Grants
      i. Track the grant from the application on, thus allowing for tracking grants that were rejected, grants that have yet to be approved, as well as grants that have been approved and tracking the schedule of payments.
   f. Ask arrays - customize asks based on donor's previous giving

2. Events
   a. Custom data sets tied to event registration forms, linking the data to the contact record and to reports
   b. Track expenses through Expense Groups
   c. Enhanced event dashboard
   d. Event notifications: Can now be scheduled in advance, and sent to either Registrants or to Attendees
   e. Private events which allows you to send link to select people, and only those with the link can register
   f. Able to pass the ticket fee to registrant
   g. Quick ticketing

3. Communications
   a. Can save multiple newsletter templates (better content editor)
   b. Enhanced donation acknowledgement with ability to set up default acknowledgement templates based on fund
   c. Labels and letters done directly through the system, rather than having to export an excel and use mail merge

    d. Centralized manage templates

4. Contact Management
    a. Enhanced duplicate prevention - ability to configure to be as strict or as loose as desired.
    b. Hygiene rules - options to help keep database clean and accurate
    c. Address types - seasonal and temporary addresses which can be configured for only part of the year
    d. Customize your own prefixes and suffixes
    e. Smart tags - create a tag which will get applied to contacts automatically when they meet a certain criteria
    f. Ability to set communication preference as "Not Set" instead of just "Yes" or "No"

5. Financials
    a. Improved transaction deposit process and screen
    b. QuickBooks online sync
    c. Full and proper Invoicing

6. Reports/Analytics
    a. Schedule reports
    b. Copy reports
    c. Enhanced advanced search functionality

7. Membership
    a. Members only Event tickets
    b. Benefit Tracking including ticket discounts.
    c. Membership Director on Public Pages
    d. Pricing categories can have different additional members
    e. Can change Single/Group options after initial saving for levels
    f. Membership Forms!
    g. Centralized membership notifications

8. Pages
    a. Multiple templates
    b. Different flow
    c. Dynamic asks on donations pages

9. Other
    a. Built with speed in mind

b. Fully on the cloud, Microsoft Azure
c. Email servers upgraded to Mandrill, instead of SMTP
d. Configuration centralization for all modules
e. Invoices and invoice management
    i. Able to tie custom data sets to invoices
f. User accounts based on username, rather than email
g. Simplified user roles management
h. Premiums and Premium fulfilment
i. Pop-notifications in places when leaving a page unsaved
j. Bread crumbs - able to view and jump back to any of the previous 10 screens
k. Advanced import utility
    i. Ability to update existing contact information
    ii. Ability to correct errors during the migration process
l. Configurable dashboards
m. Interaction and Task management linked to Pledges
n. Payment Gateway - Stripe is now an option

10. Future enhancements in NPE 2.0, to name a few:

a. Upcoming: Custom form builder
b. Upcoming: Ability to allow chapters to have their own NPE instance, where they can manage and publish their donations and events, which will roll back up to the admin account
c. Upcoming: Giving by text
d. Upcoming: Social Media integration
e. Upcoming: Integration with NCOA (postal address service)