



## October Sweet Treats!

This month, we're excited to announce the release of three new features in Fundly CRM plus speed enhancements to CRM navigation and reports.

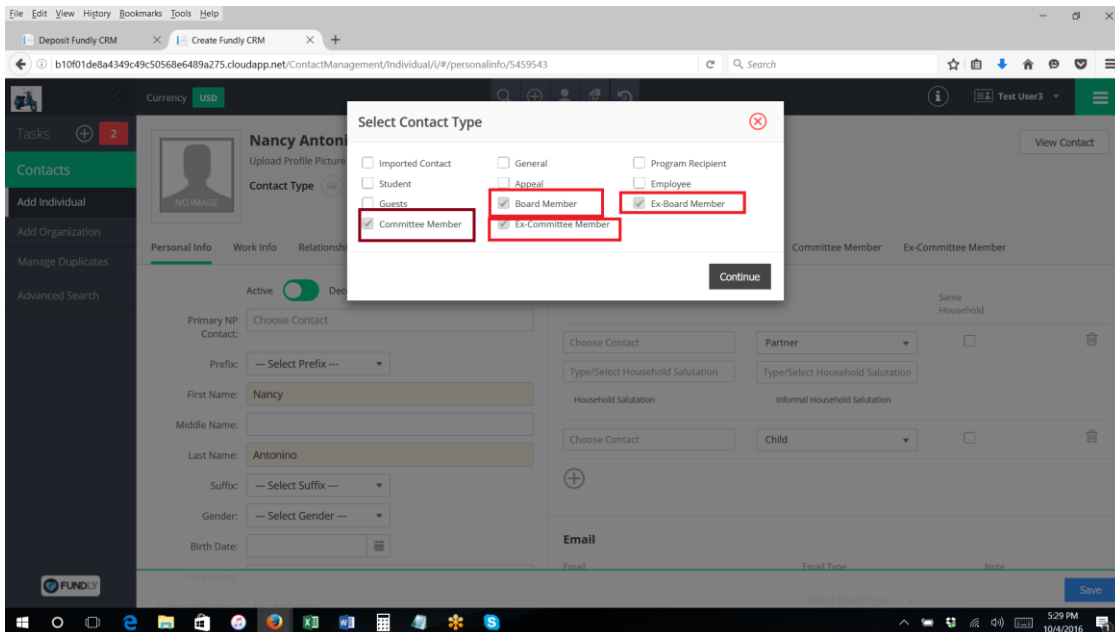
### The Need for Speed!

We've optimized report performance so that reports should now run much faster; you'll also see speed enhancements throughout the CRM.

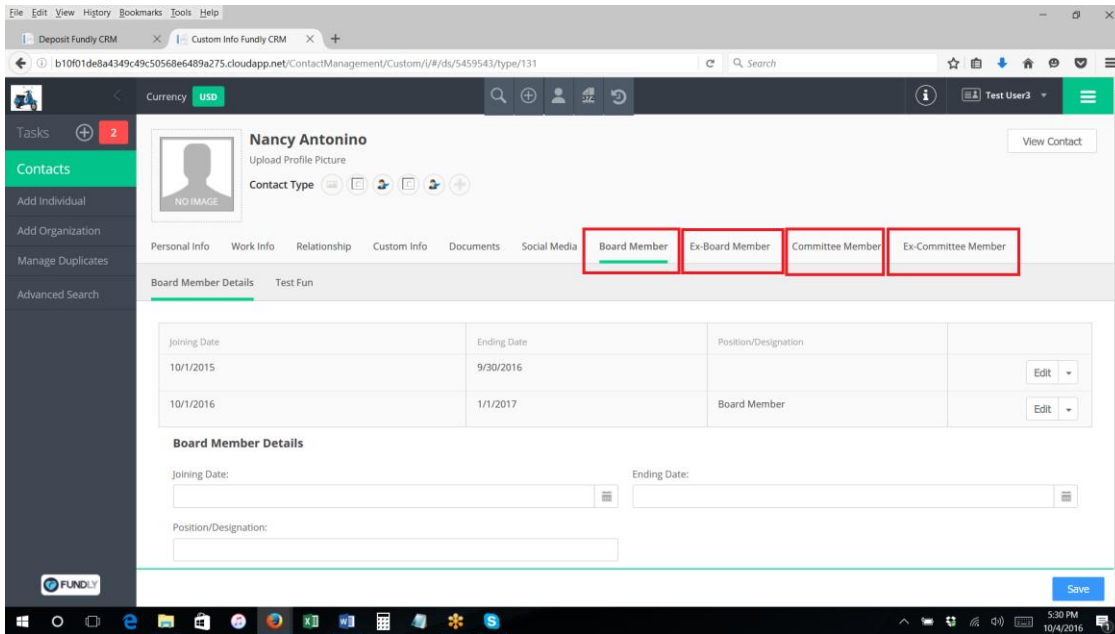
### Board and Committee Tracking

You asked, we delivered!

Users can now track contacts' participation in boards and committees by adding the "board member" and "committee member" contact types to contact records (while in the edit contact screen). **Please note: this feature is not turned on by default for current v2 clients. If you would like this feature turned on in your CRM, please email us at [support@fundly.com](mailto:support@fundly.com) to request it.**

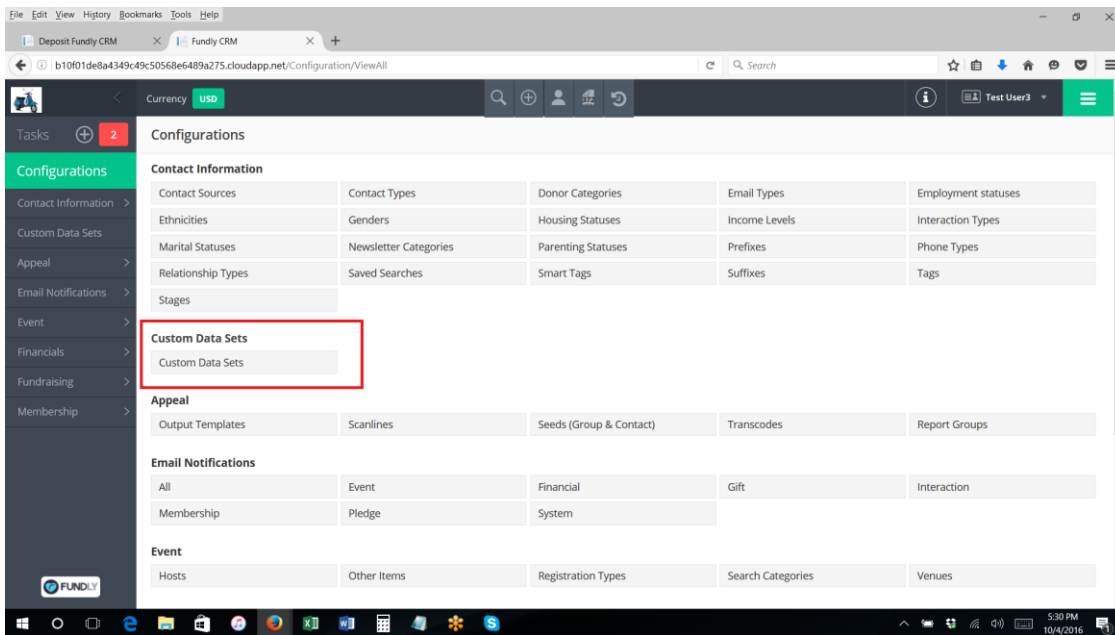


This will then add tabs for "board member" and/or "committee member," where you can add the contact's start and end date for participation and the position held.

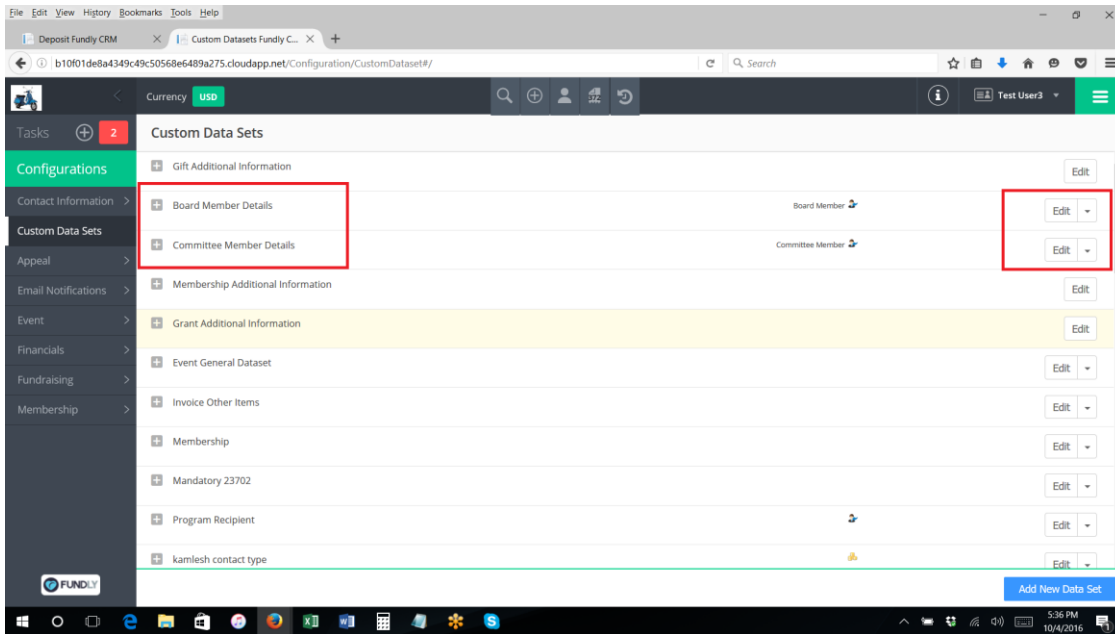


When the contact is no longer an active board or committee member, users can then add the “ex-board member” and/or “ex-committee member” to the contact record (note: the “ex” contact types will not automatically assign once the participation end date has passed; users must manually assign these contact types).

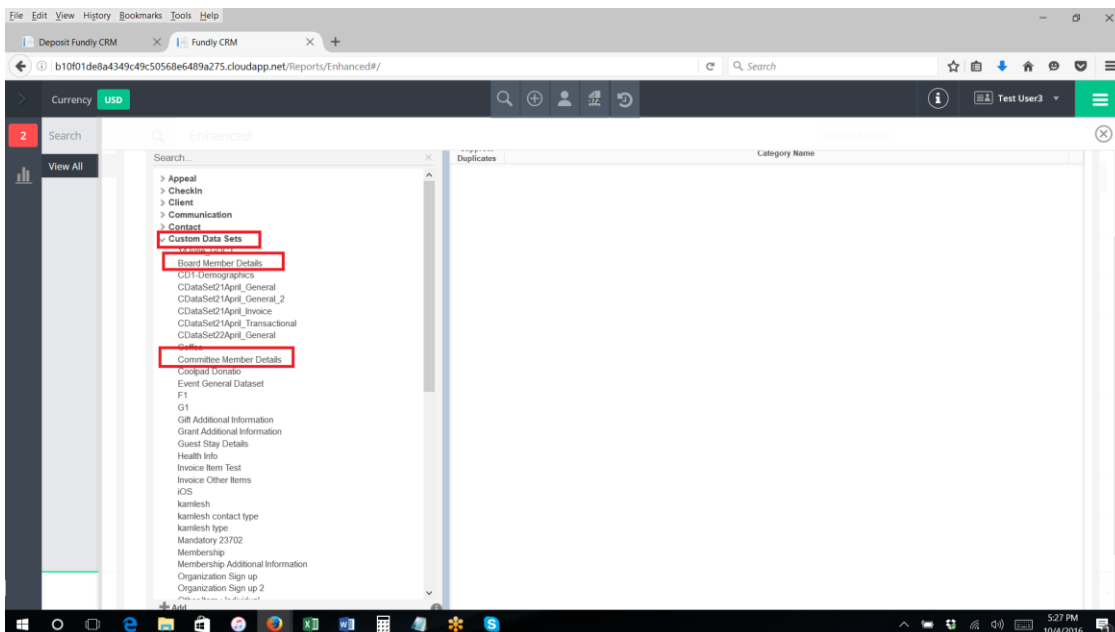
The Board Member and Committee Member custom data sets are configurable and users can add additional fields to these data sets by going to Configurations and then selecting Custom Data Sets.



Within the list of Custom Data Sets configured within your CRM, click “edit” on the drop down menu to the right of the custom date set you want to edit

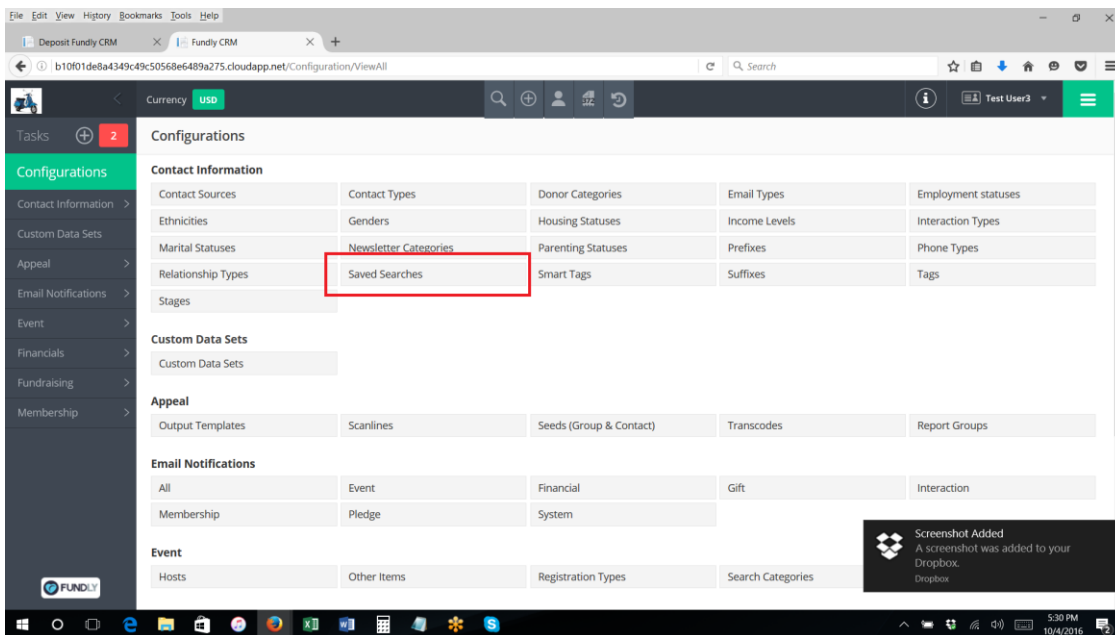


You can also use the Board Member and Committee Member custom data sets in reports; you'll find them in the "Custom Data Sets" category.

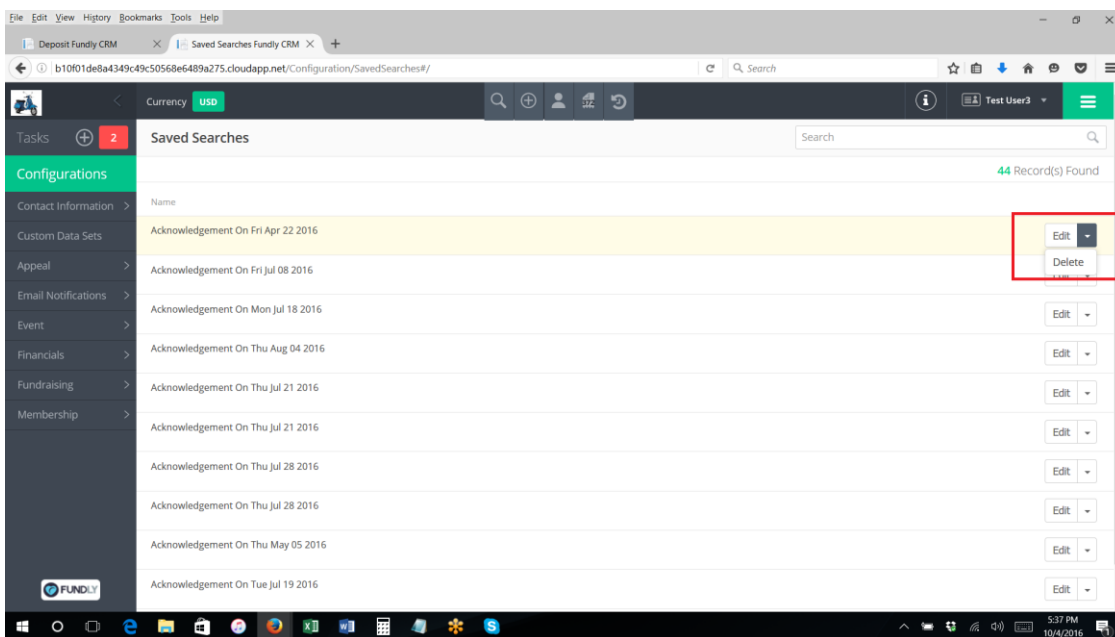


### Edit and Delete Saved Searches

Bye-bye saved searches! Users can now delete saved searches; simply go to the Contact Information section on the Configurations menu. From there, select saved searches.

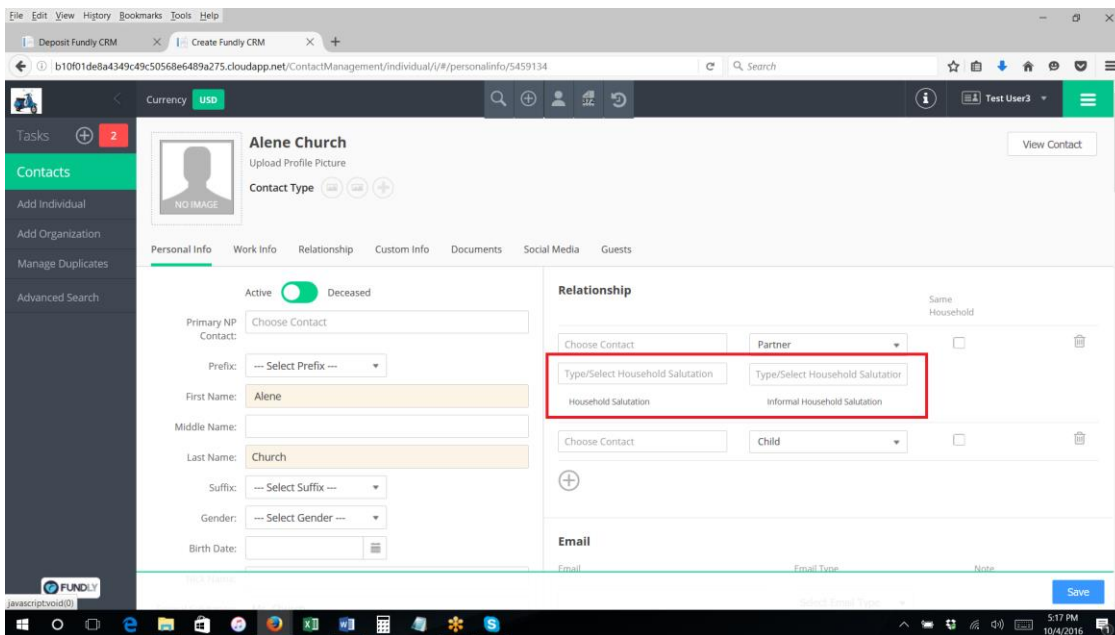


To delete a saved search, simply select the drop down menu to the right.

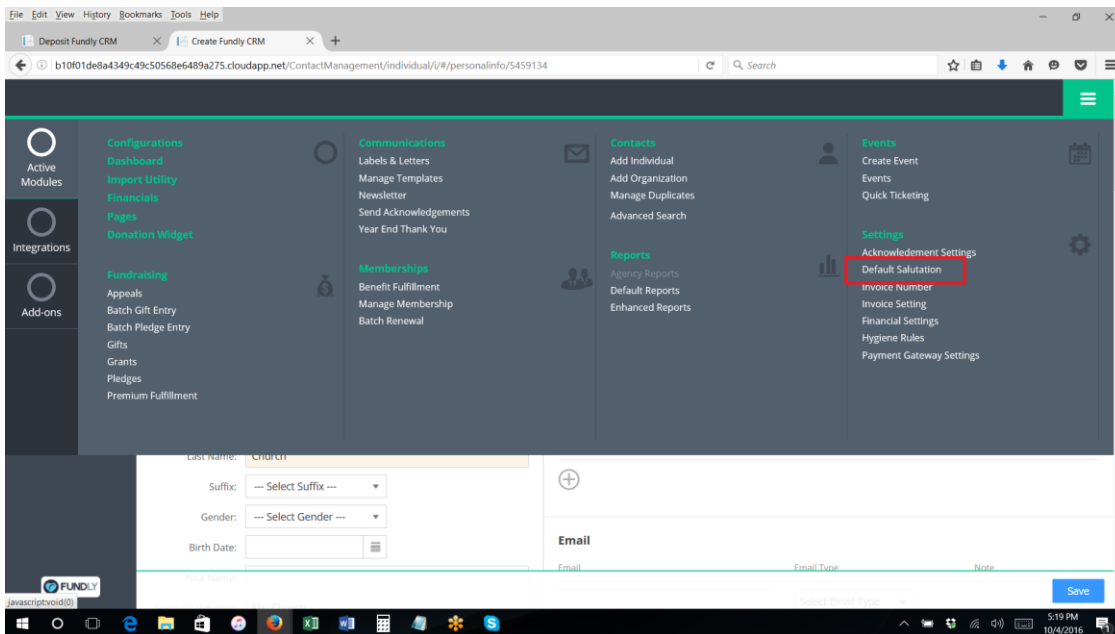


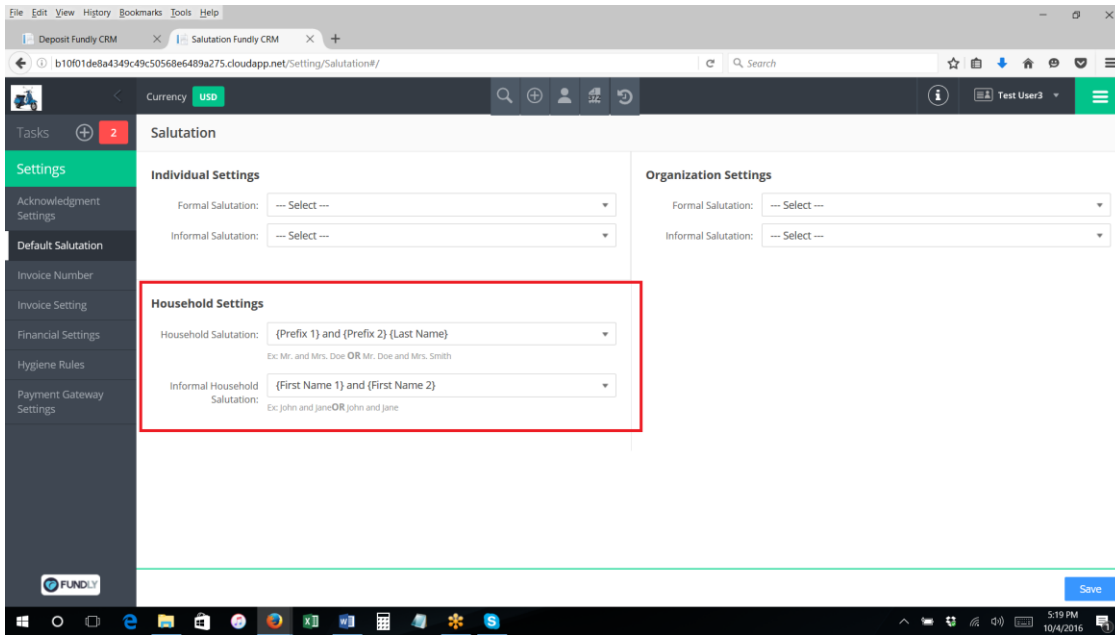
## Informal and Formal Household Salutation

We have added a second household salutation field to individual contact records, so now users can configure both a Formal Household Salutation and an Informal Household Salutation.



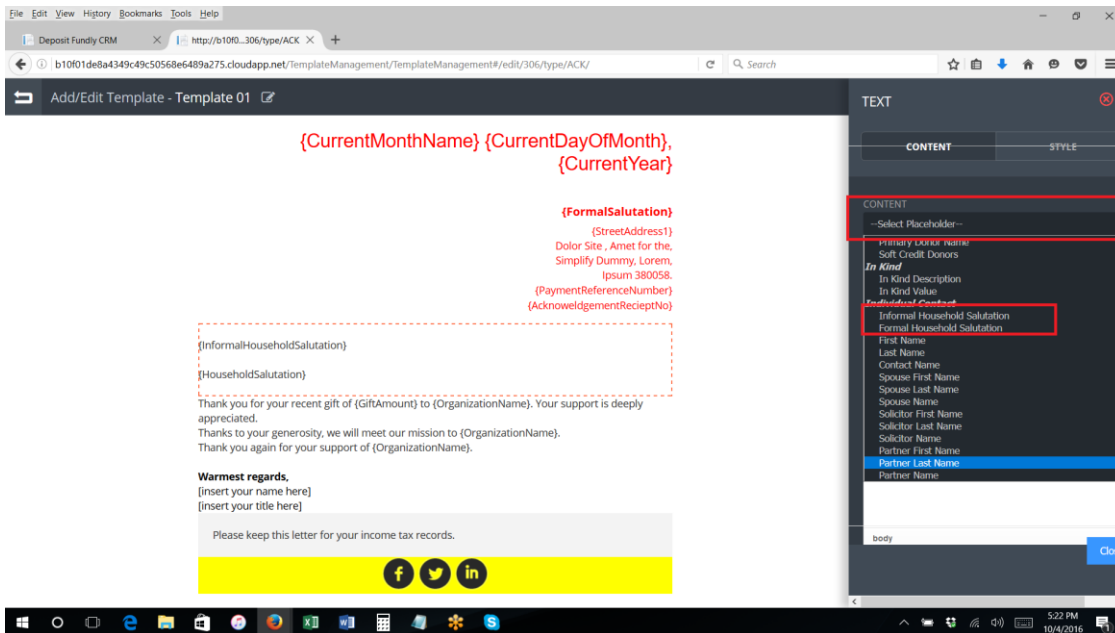
The default for both fields can be configured by selecting "Default Salutation" on the Main Menu under Settings in the lower right hand corner.



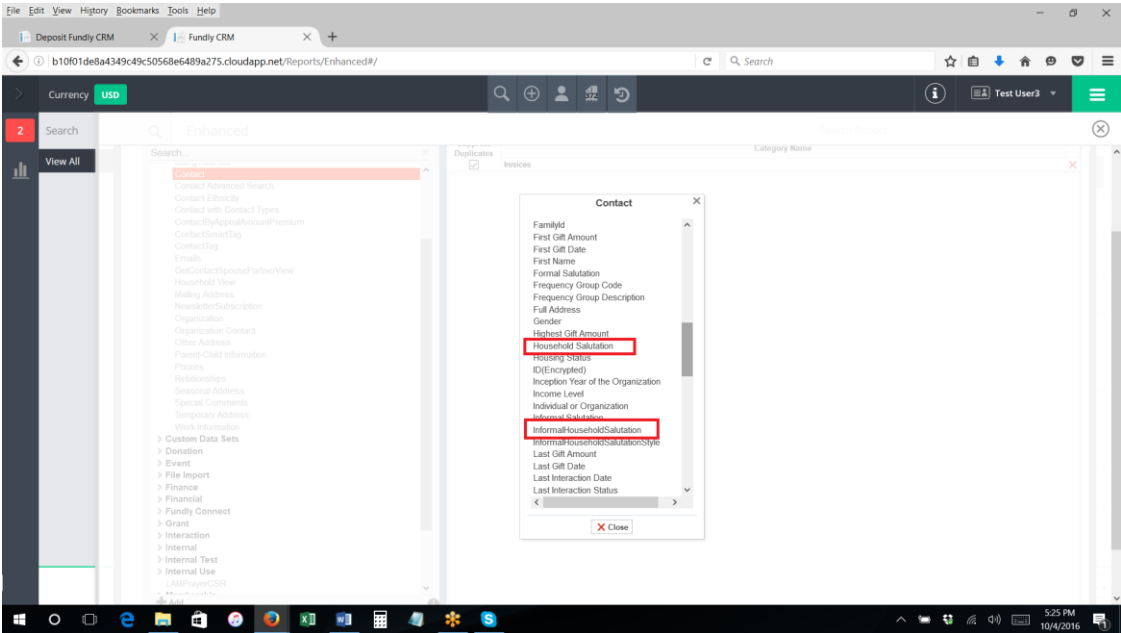


As was the case before, users can over-write the default Informal Household Salutation and Formal Household Salutation per contact by simply typing over the default value when editing a contact record.

Both of these fields have been added to the list of placeholders that can be added to templates (and in "Send Email")...



And they are available to be added to reports; you'll find them on the "Contact" category



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).

