

Great New Things From Fundly CRM v2 and Fundly Connect!

Today, we have released several new features for Fundly CRM v2 and Fundly Connect to facilitate navigation and usability:

CRM:

- Ability to Edit/Customize Email Donation Acknowledgements
- Increased Send Email File Attachment Size
- Additional Email and Envelope Placeholders
- Added Date and Time Attending to List of Event Registrants
- Delete All Contacts

Connect:

- Added "Audience" Column to Email Notification Configurations
- Exportable Email Summary reports
- Volunteer Public Portal Navigation Changes
- Added Website Links to "My Associations"

Read on for all the details!

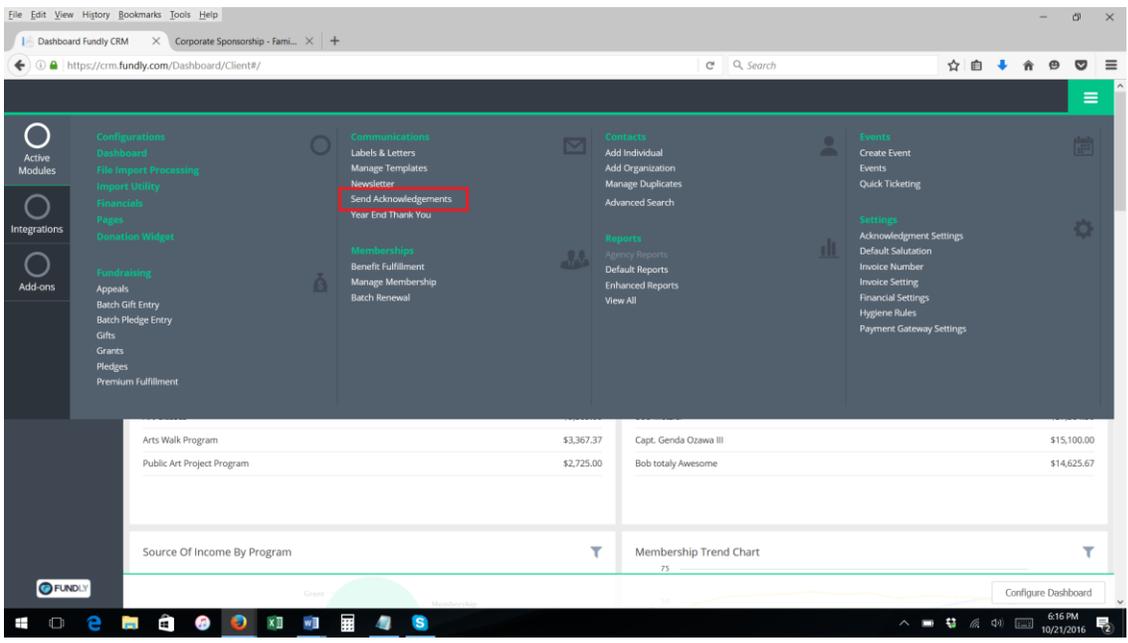
With the release of a new build, users may experience some irregularities in their CRM or Connect account such as the appearance of strange code, blank screens/modules, lack of word wrapping, etc. These issues are related to the need to clear your browser cache and/or to log out and back in to the system 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.



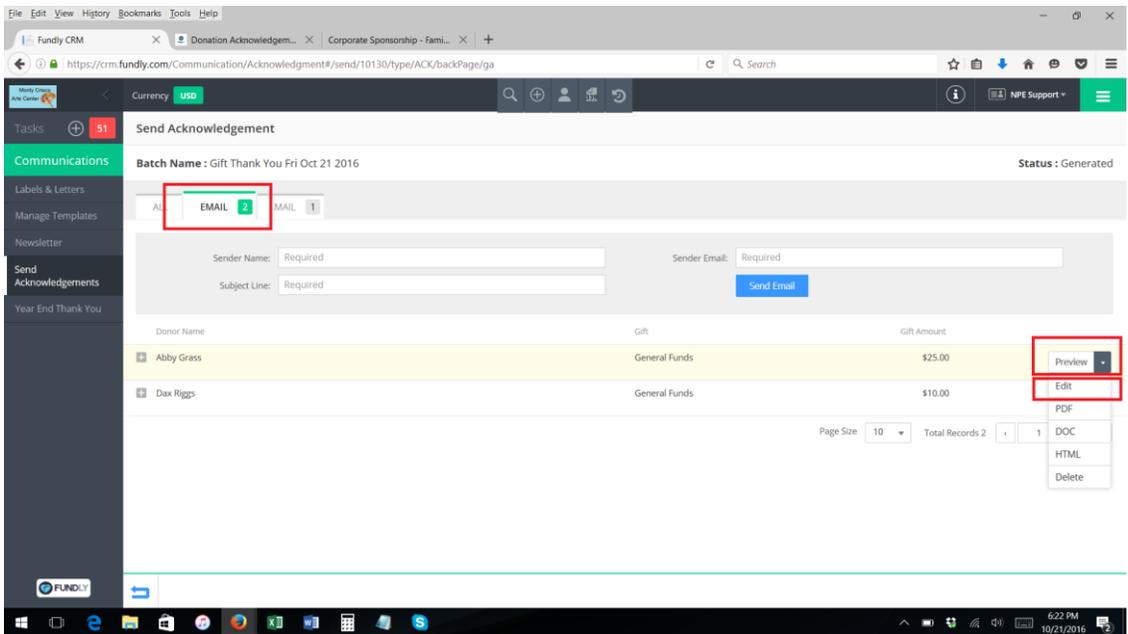
Edit/Customize Email Donation Acknowledgements

Now, while generating donation acknowledgements, users can edit the individual emails within the batch.

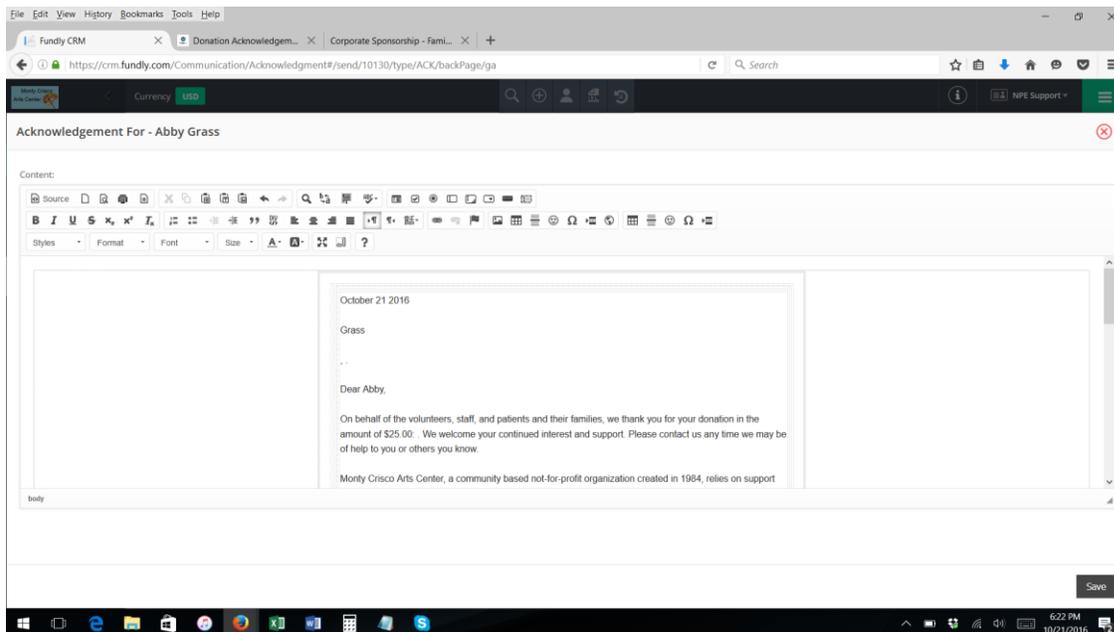
Simply generate donation acknowledgement letters as you normally would by selecting "Send Acknowledgements" from the Main Menu (you can [view our tutorial here](#) if you need more information on creating donation acknowledgements).



On the last step of generating email acknowledgements, select the drop down menu to the right of the email you wish to edit and select edit.



This will bring up the edit email screen. Here you can make any changes to the email this donor will receive.



Increased Send Email File Size

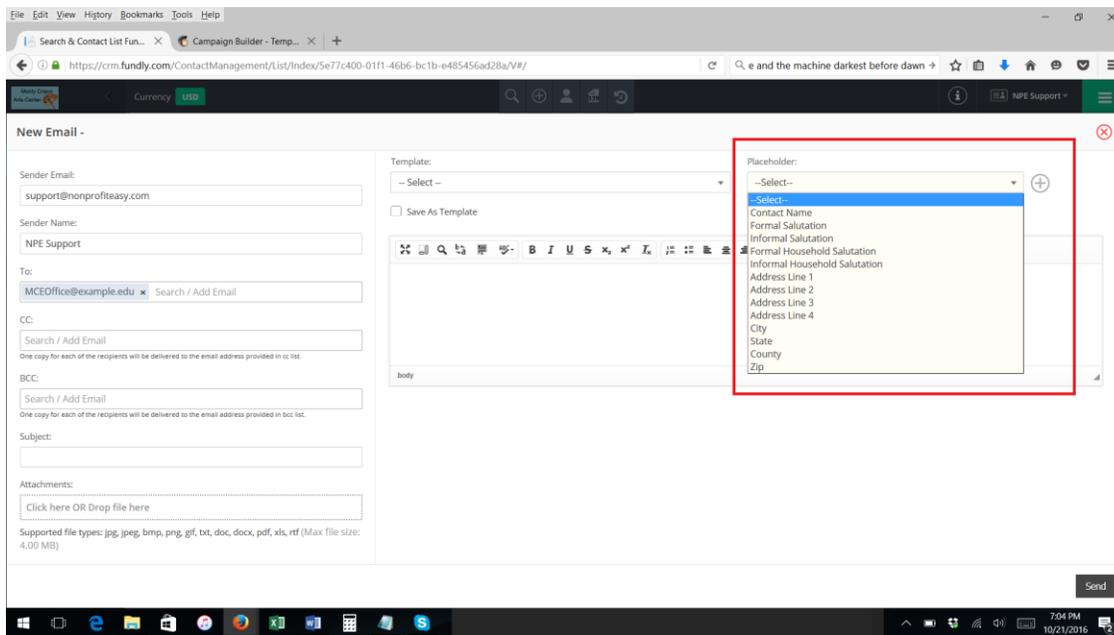
Send email...now with bigger file sizes!

We've increased the total size of file attachments sent using the "Send Email" function with Fundly CRM from 1 MB to 4 MB.

Additional Email And Envelope Placeholders

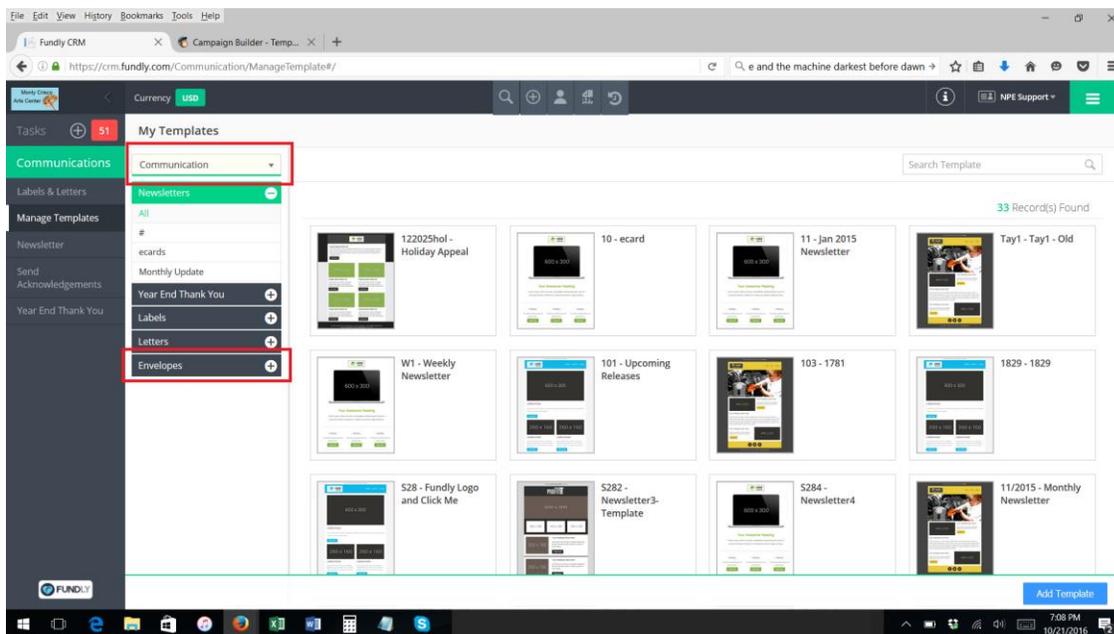
Send email...now with more placeholders!

We've added the option to include any of the four lines of the street address plus the city, state, and zip to emails sent from Fundly CRM (using the "send email" function).

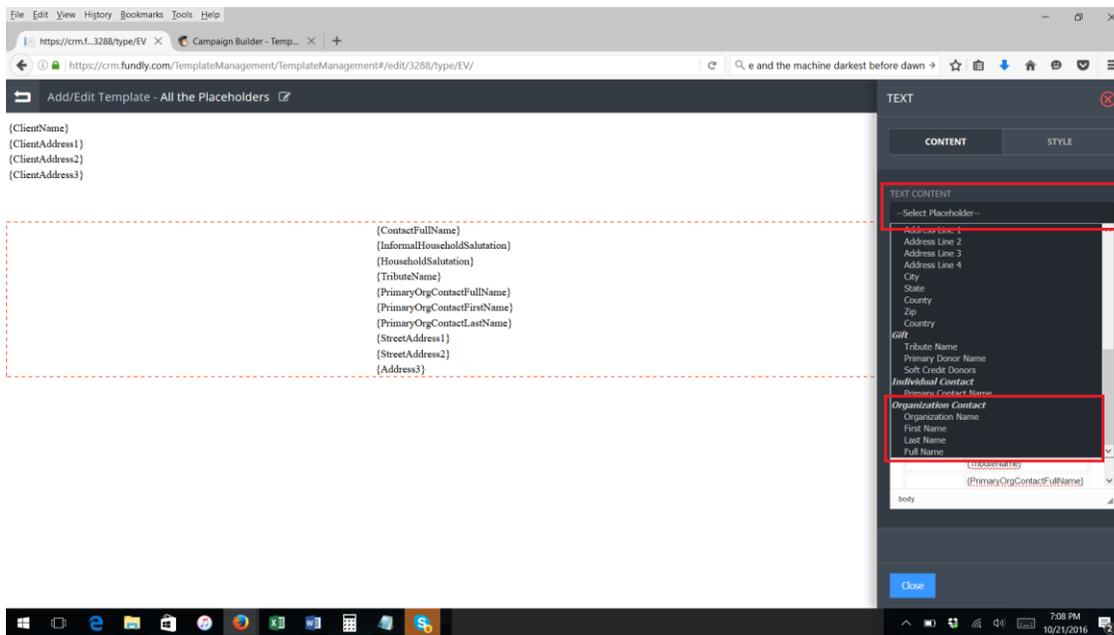


We've also added additional placeholders to envelopes templates, including tribute related placeholders and organizational primary contact.

When in Manage Templates, select the "Communications" category and then "Envelopes"

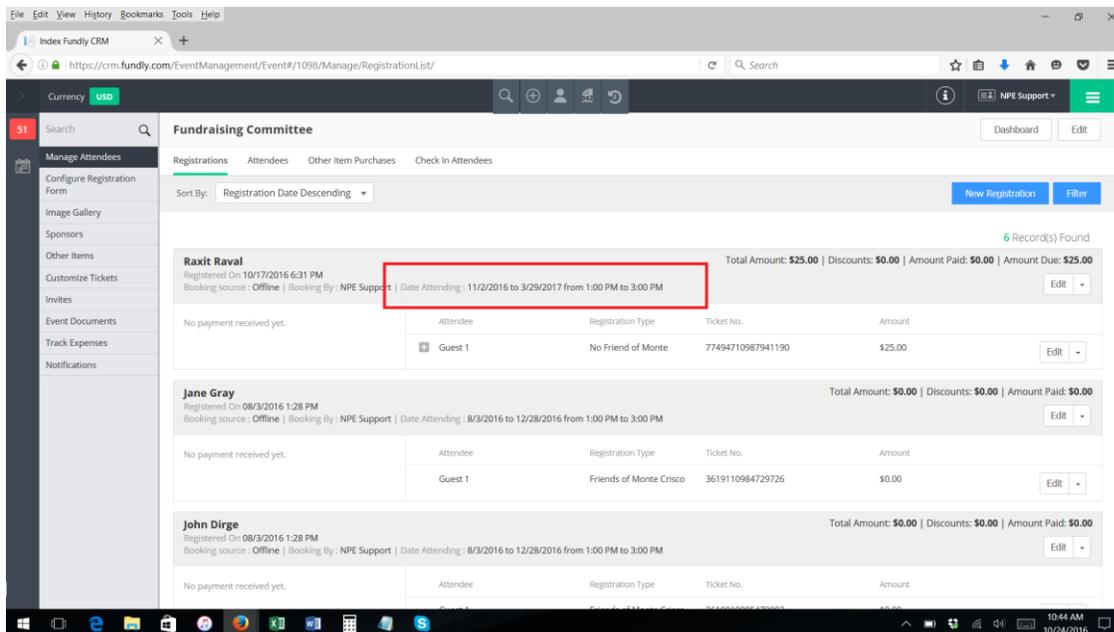


While editing an existing template or creating a new one, you can add any of the placeholders from the placeholder menu on the right.



Added Date and Time Attending to Event Registrant List

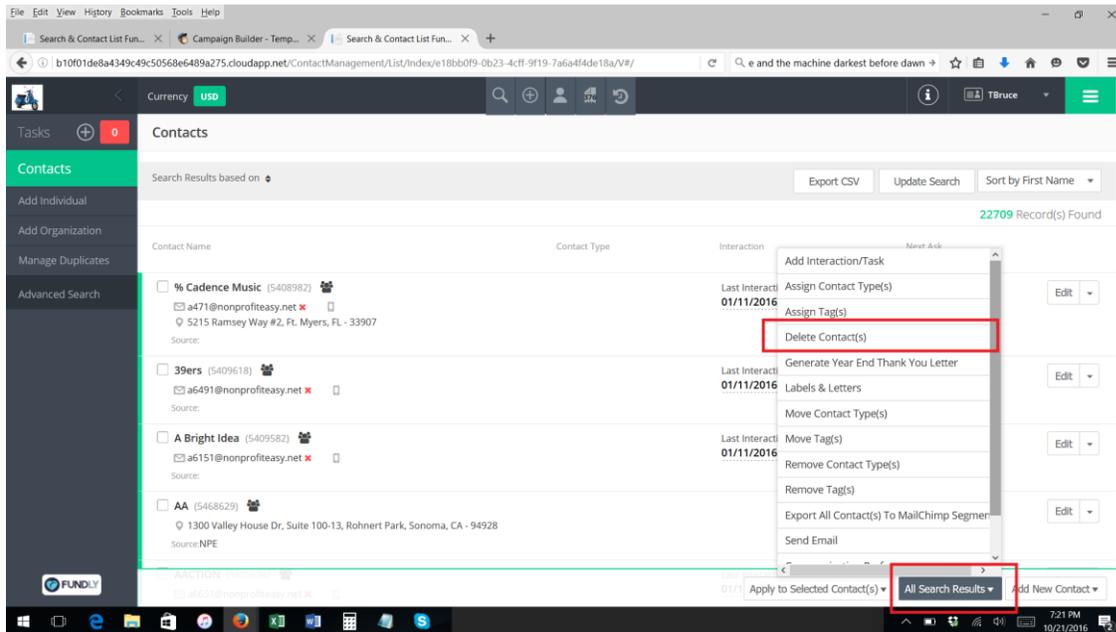
Users can now see the date and time each registrant is attending an event on the "Registrations" tab of "Manage Attendees"



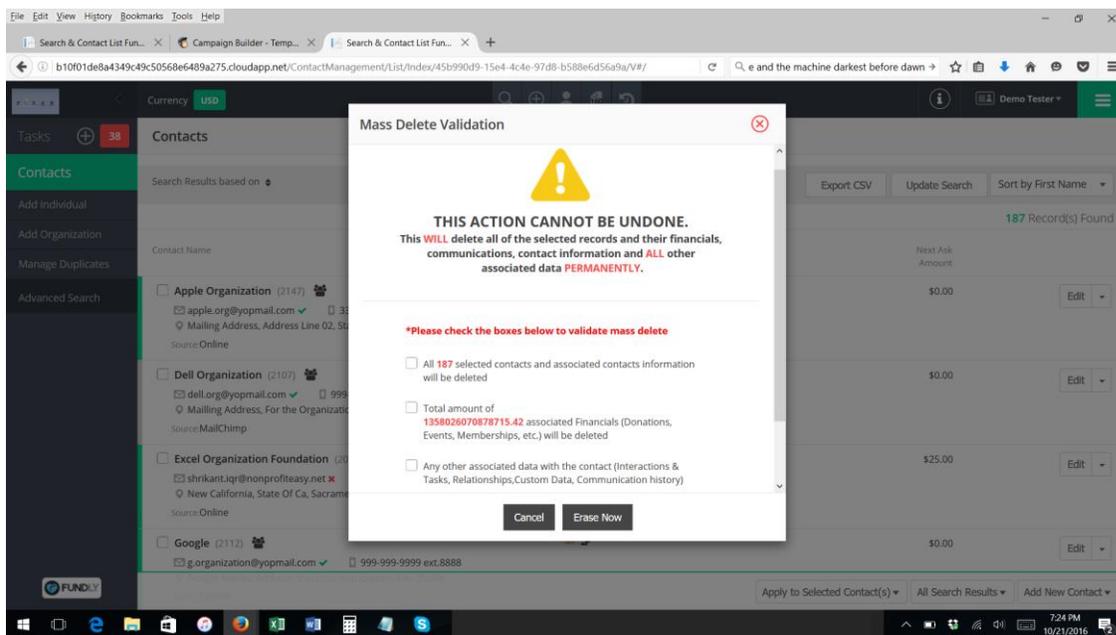
Delete All Contacts

And we do mean ALL...

If you feel like living dangerously, there is now an option to “Delete Contacts” on the “All Search Results” take action menu.



This means that, yes, you can now delete your entire database if you want. But don't worry! There is a major warning/validation that pops up, the user must select 3 check boxes and type the word "DELETE" in a text box in order to proceed, and users who do not have permission to delete contacts cannot use this function – so it's nigh impossible to accidentally delete your entire database.



However, we do feel compelled to mention that deleting contacts is an irreversible action – so once they are deleted they are gone!

have the public portal feature).

A description of the buttons and links are now displayed at the top of the opportunity list so volunteers know what each one does.

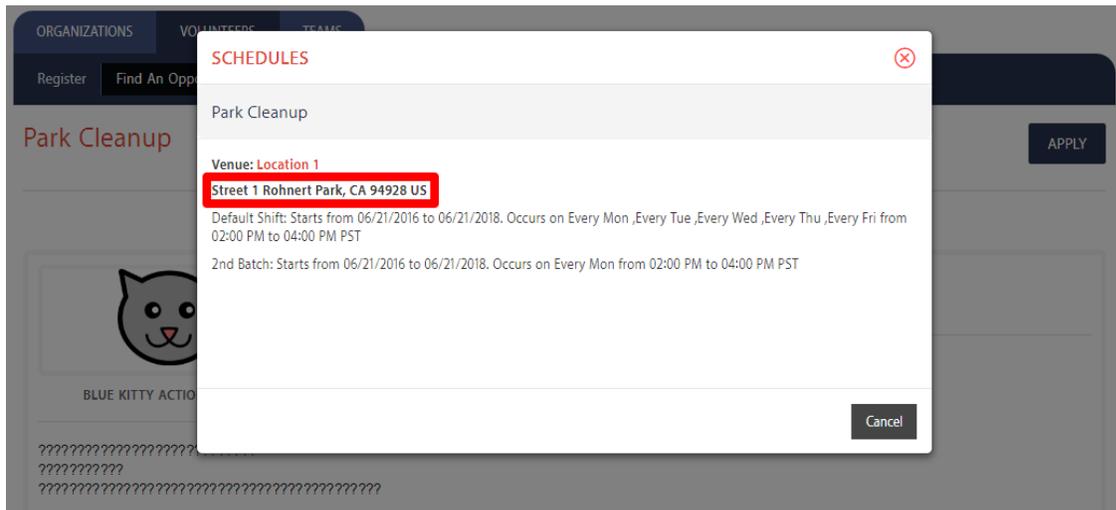
Search Opportunities

63 OPPORTUNITIES FOUND PUBLIC

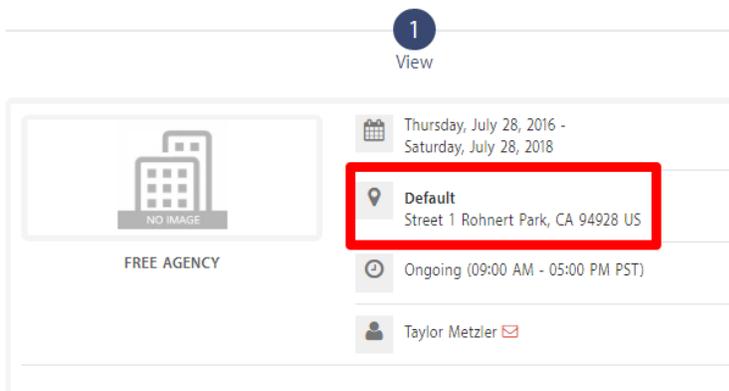
Click "**View**" to view opportunity details and available dates and times for each opportunity.
When there are multiple venues, click on "**View Multiple Venues**" to view all the venues for the opportunity.
When there are multiple schedules, click on "**View Schedules**" to view all the schedule(s) for the opportunity.

SHOW ADVANCED SEARCH

We have added the exact address of the Venue for the opportunities. This will inform the volunteers where to go on their volunteering date.



Tree Planting



After completing the Volunteer Signup, a confirmation message will be displayed containing buttons on where the volunteer can go next.

Volun

CONGRATULATIONS!

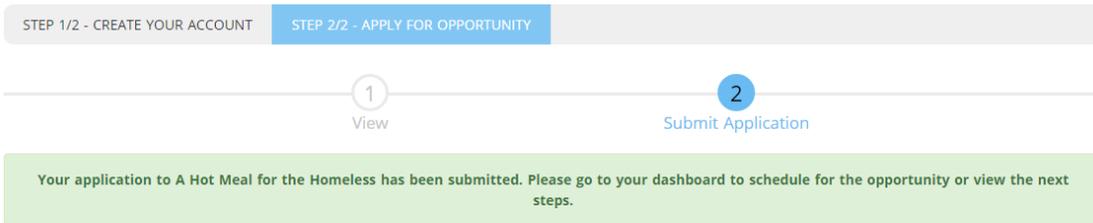
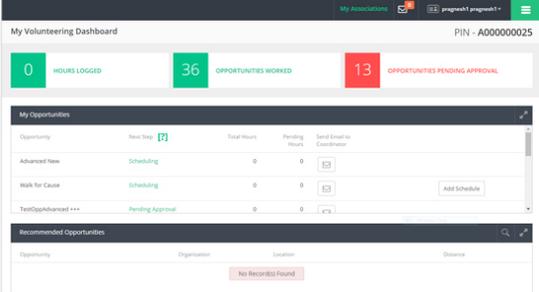
You have successfully registered as a volunteer. Where would you like to go?

[GO TO RECOMMENDED OPPORTUNITIES](#)
[GO TO MY DASHBOARD](#)
[SEARCH OPPORTUNITIES](#)



Welcome to Fundly Connect, the volunteer portal for HandsOn Jacksonville.

After a volunteer has submitted his/her Opportunity Application, the page will display a screenshot of a sample Dashboard. This will instruct the volunteers that they have their personal Dashboard where they can manage their opportunities.

My Volunteering Dashboard

PIN - A000000025

0 HOURS LOGGED 36 OPPORTUNITIES WORKED 13 OPPORTUNITIES PENDING APPROVAL

Opportunity	Next Step	Total Hours	Pending Hours	Send Email to Coordinator
Advanced New	Scheduling	0	0	✉
Walk for Cause	Scheduling	0	0	✉ Add Schedule
TestOpplanned ***	Pending Approval	0	0	✉

Recommended Opportunities

Opportunity	Organization	Location	Distance
No Records Found			

[BACK TO SEARCH](#)
[GO TO DASHBOARD](#)

After submitting, a Scheduling window will appear in which the volunteer can schedule himself/herself. This is only for opportunities that don't need any application approval of the organization/VAC.

Your application to A Hot Meal for the Homeless has been submitted. Please go to your dashboard to schedule for the opportunity or view the next steps.

A HOT MEAL FOR THE HOMELESS

Your application to A Hot Meal for the Homeless has been submitted. Please schedule for the opportunity.

Venue: Shift:

Position:

Availability: **DATE** DAY OF WEEK MONTHLY

From Time: Till Time:

Opportunity Application is submitted successfully.

On the Scheduling window, we have set the 'Date' tab as the default Availability selection. This tab displays all possible scheduling dates where volunteer can just select the dates then save.

A Hot Meal for the Homeless

Other, Occurs from 03:30 PM to 06:00 PM

Availability: **Date** Day of Week Monthly

From Time: Till Time:

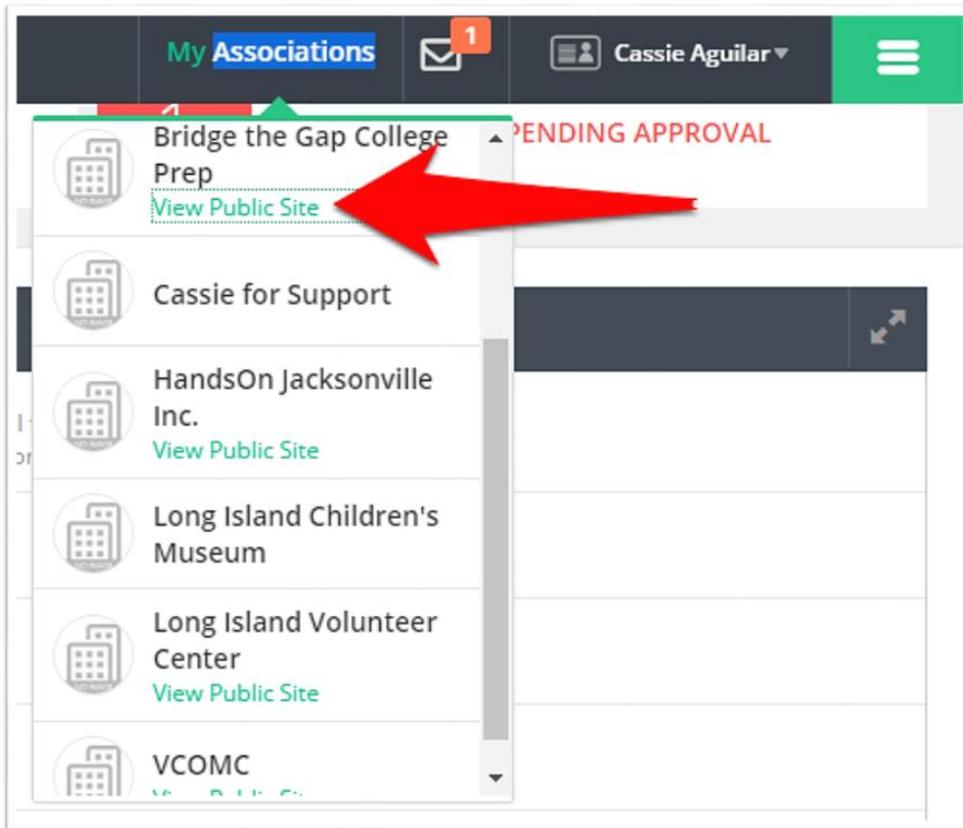
Set Volunteering Dates

6/1/2016

<input checked="" type="checkbox"/> 6/1/2016	<input checked="" type="checkbox"/> 6/8/2016	<input checked="" type="checkbox"/> 6/15/2016
<input checked="" type="checkbox"/> 6/22/2016	<input checked="" type="checkbox"/> 6/29/2016	<input checked="" type="checkbox"/> 7/6/2016
<input checked="" type="checkbox"/> 7/13/2016	<input checked="" type="checkbox"/> 7/20/2016	<input checked="" type="checkbox"/> 7/27/2016
<input checked="" type="checkbox"/> 8/3/2016	<input checked="" type="checkbox"/> 8/10/2016	<input checked="" type="checkbox"/> 8/17/2016

FUNDLY Added Website Links to "My Associations"

Connect users can now access direct links to the website(s) of their associated VAC(s)/organization(s) by clicking on 'My Associations', then clicking on 'View Public Site' link below the name of the VAC/organization site they want to visit.



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).

