We've Cooked Up Some New Features...

Today, we have released several new features for Fundly CRM v2 and Fundly Connect that we think you're going to really enjoy:

CRM:

- Ability to Format Phone Numbers in Reports
- Assign Account and Class to Event Other Items
- Major Changes to Generate Donation Acknowledgements Area

Connect:

- Moved the Dashboard link for easier viewing
- Added the Ability to Embed You Tube Videos on Public Site
- Added Clarity Around "CC" and "BCC" fields in "Send Email"
- Added Clarity Around Schedules and Shifts
- Change to Recommended Opportunties

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.
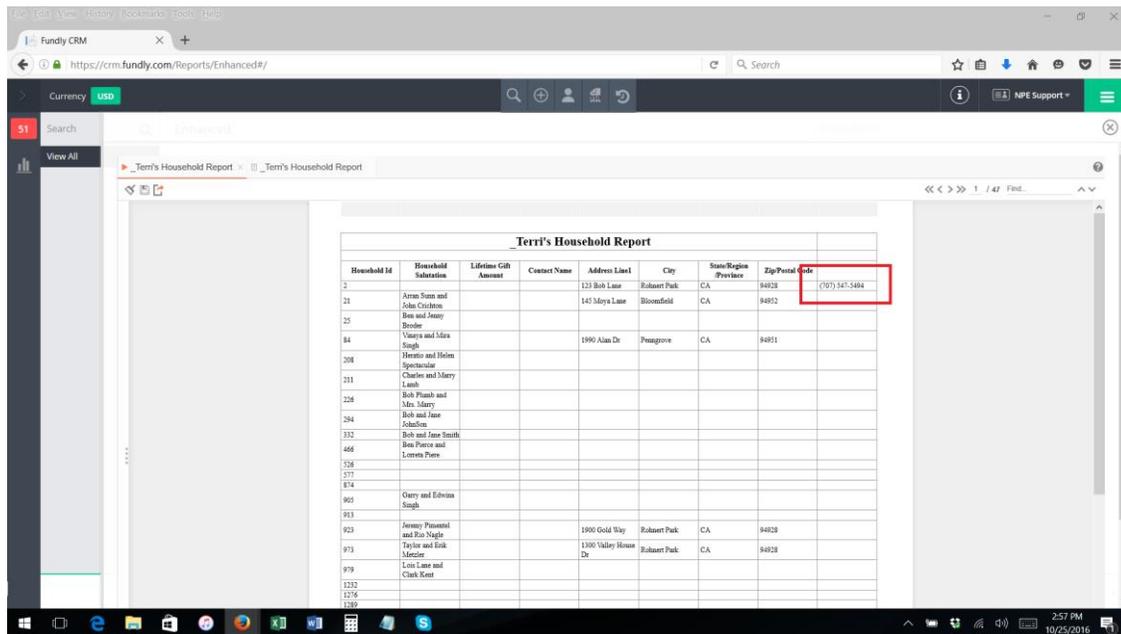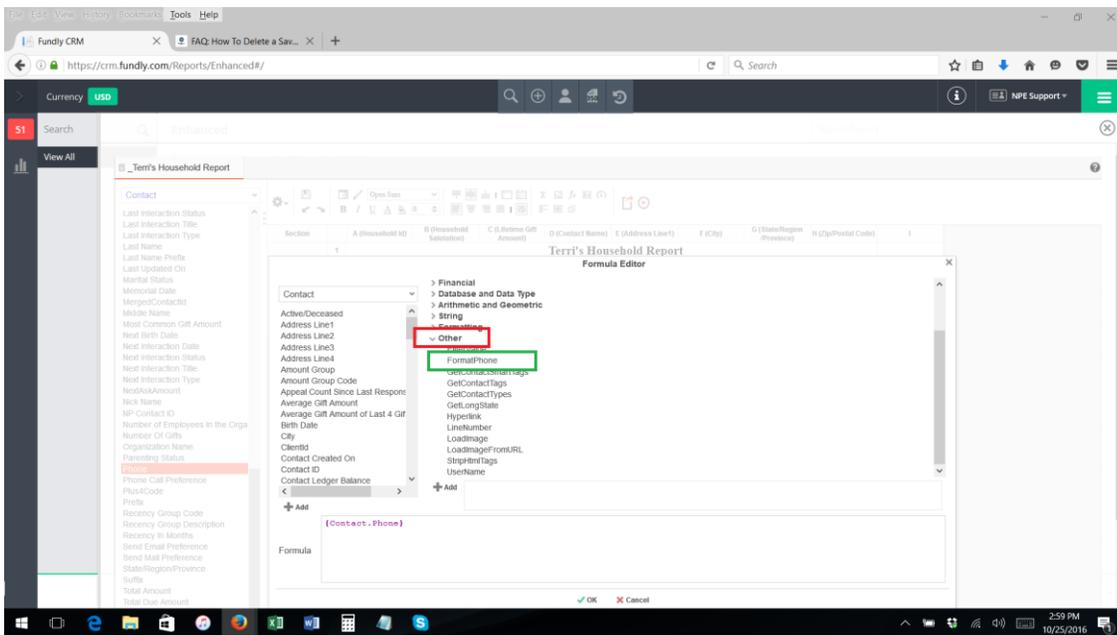
Want an easy way to format phone numbers in reports (by default they come out as an unformatted string)?
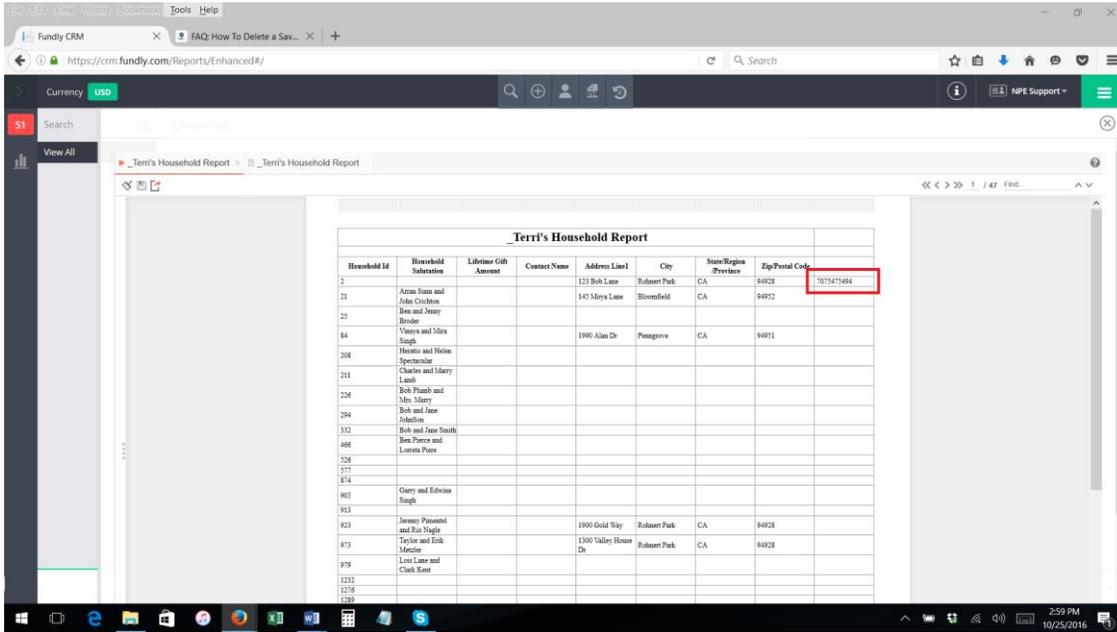
Introducing the "Format Phone Number" function! Just apply this function to the phone number field in the report and it will format phone numbers as (XXX) XXX-XXXX.
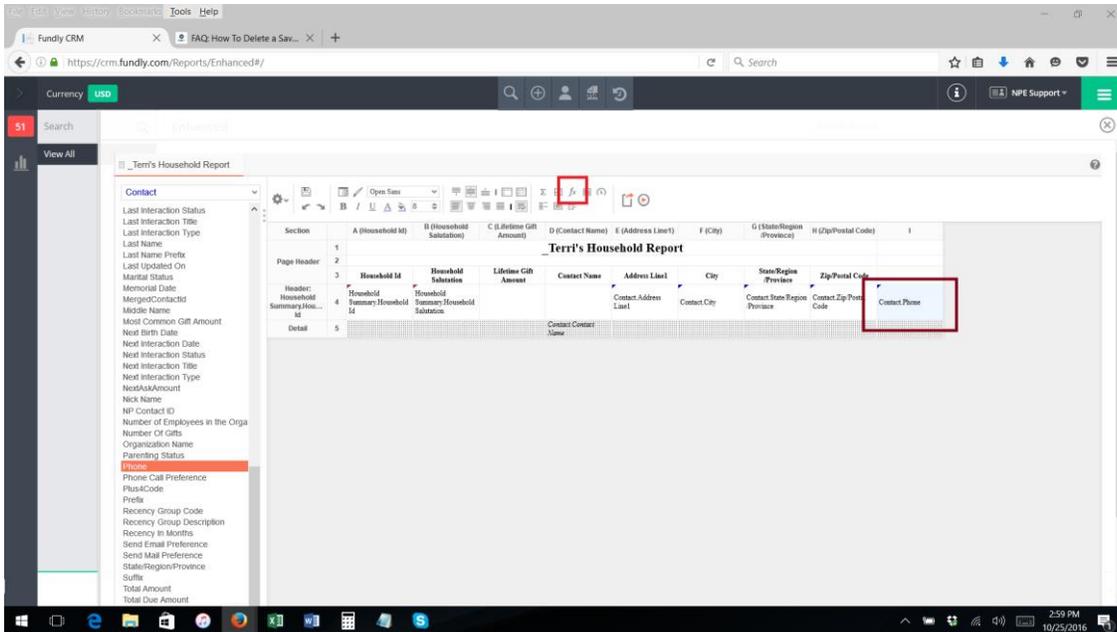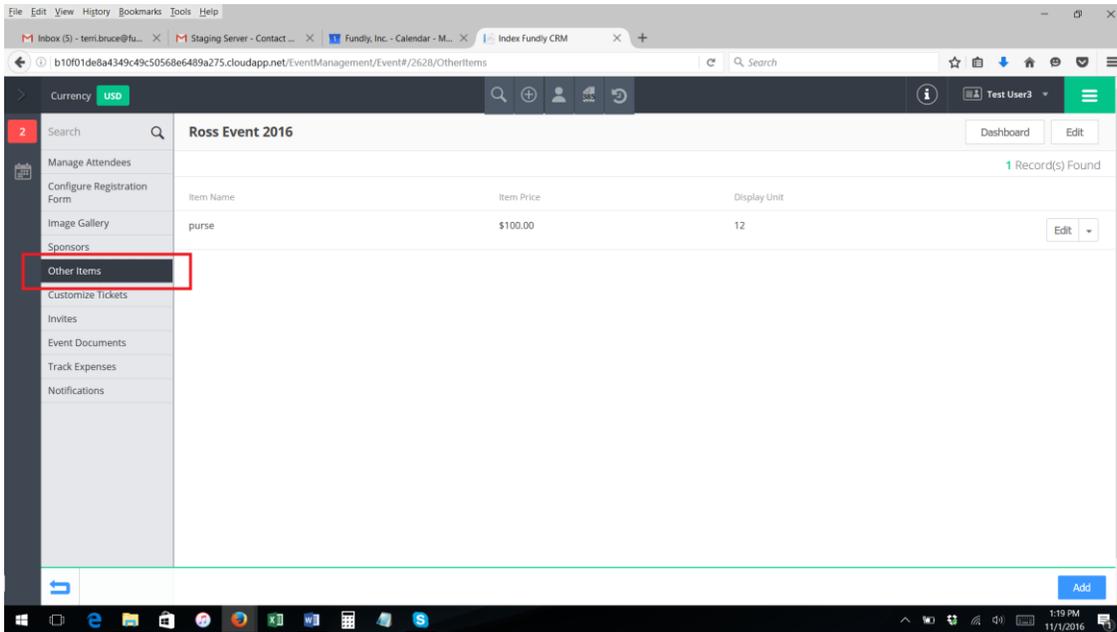
For full instructions on how to use this function, see the tutorial in our tutorial library.
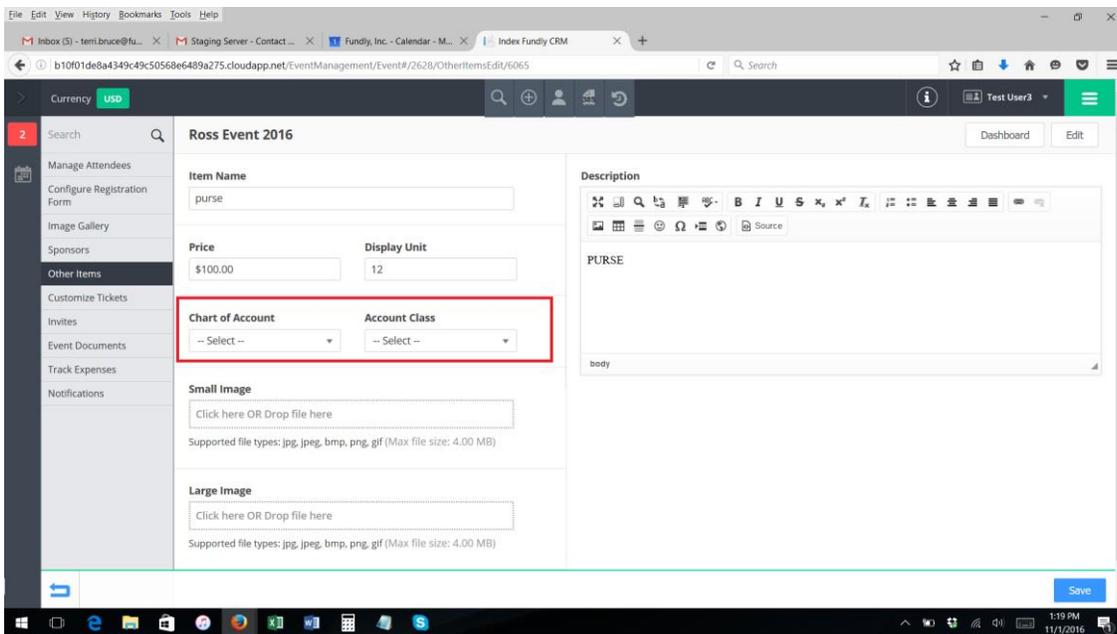
FUNDLY CRM Assign Account and Class to Event Other Items

Users now have the ability to assign Account and Account Class to Event Other Items.

While configuring "Other Items" inside of an event...

Users now can assign an Account and/or a Class to each Item.

Users can also configure the Account and Class for Default Event Other Items from within the Configurations area. From the Main Menu select Configurations, scroll down to Events, and select Other Items.
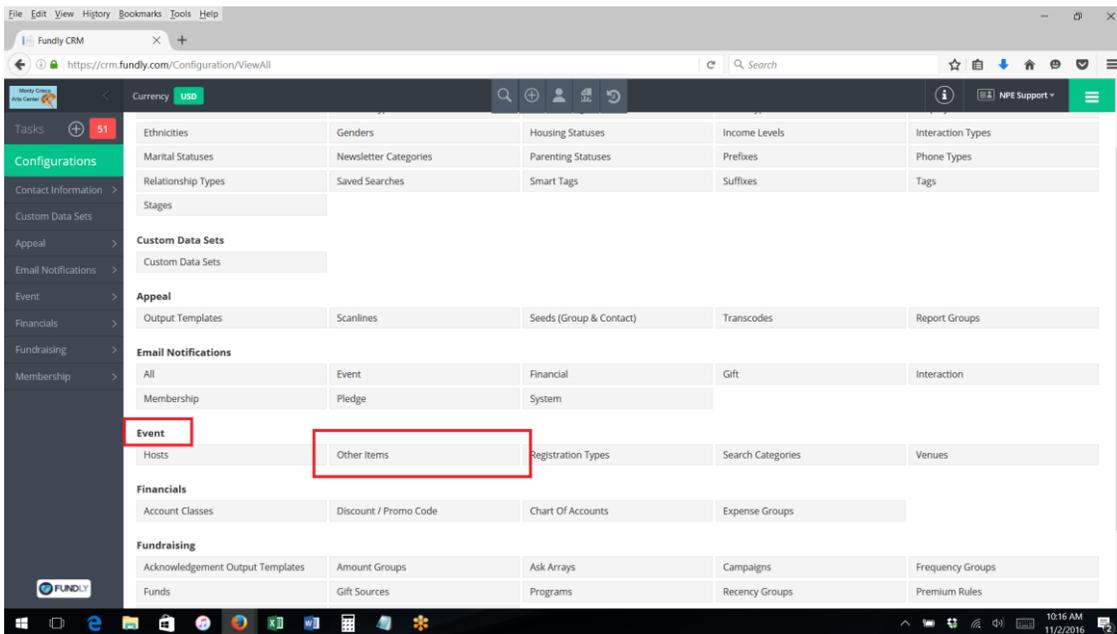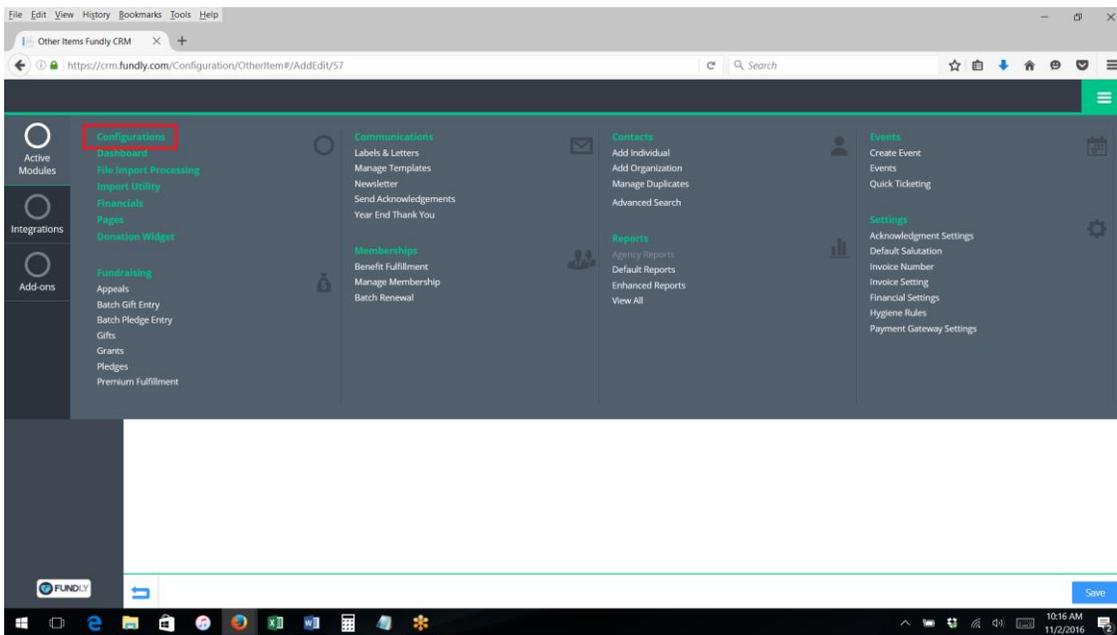
You can then set the Account and Class on each item already configured by selecting Edit or by adding new Other Items.
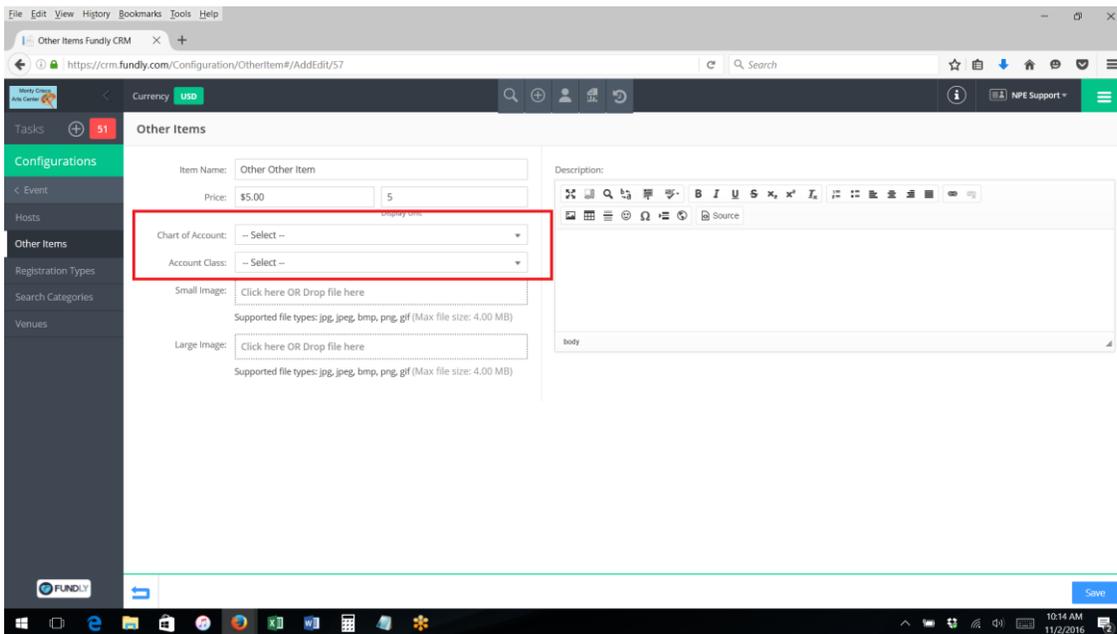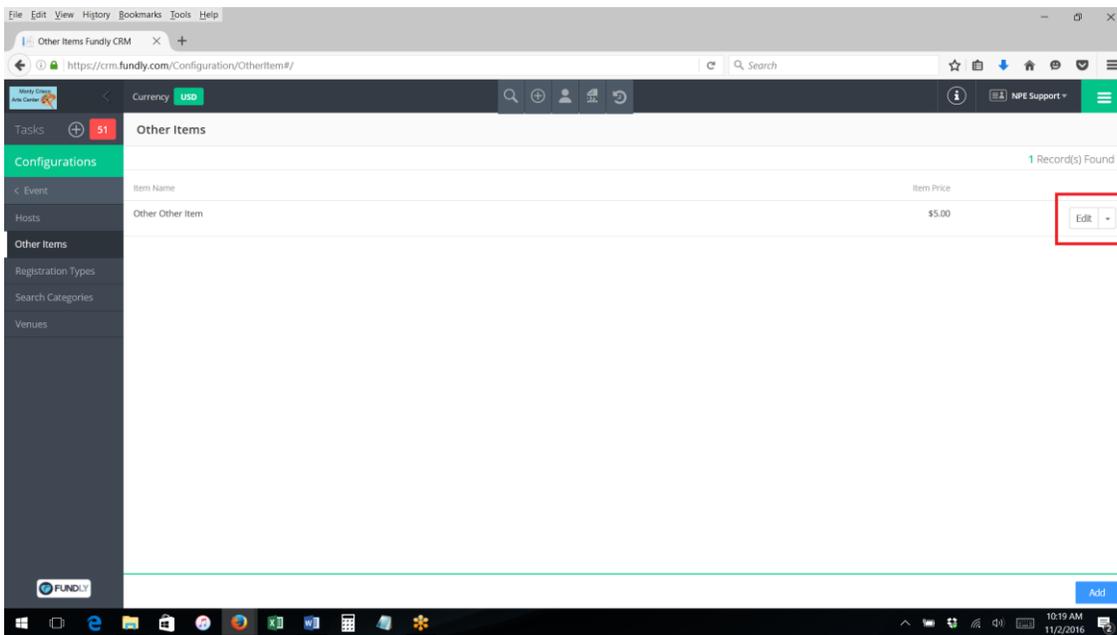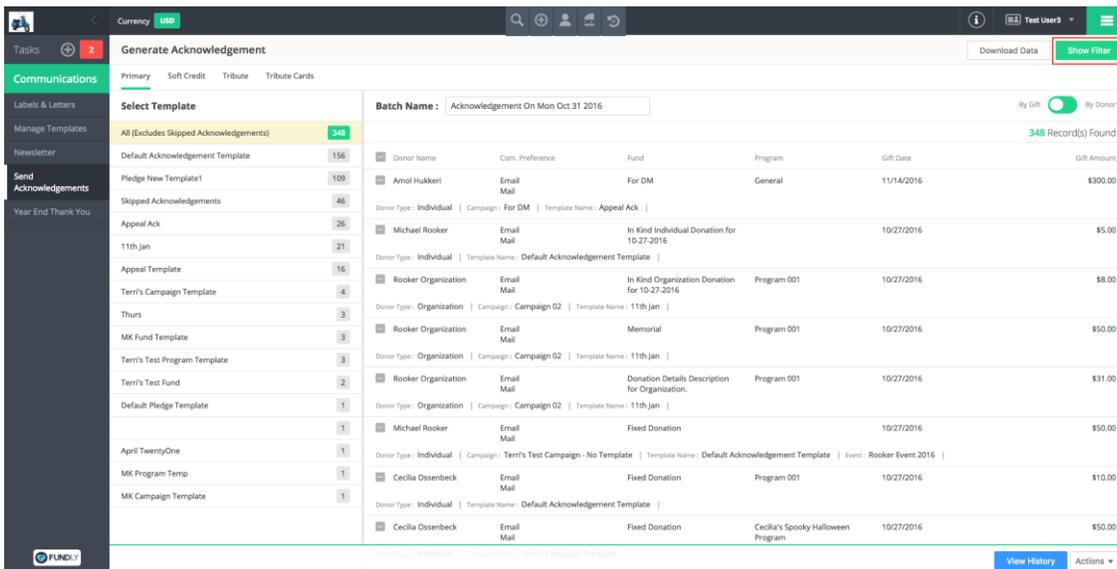
Send Donation Acknowledgements Index Page

The index page of "Send Donation Acknowledgements" has been completely revamped to add more, more, more functionality!

We've added more summary information (including displaying program, campaign, and event information for donations)
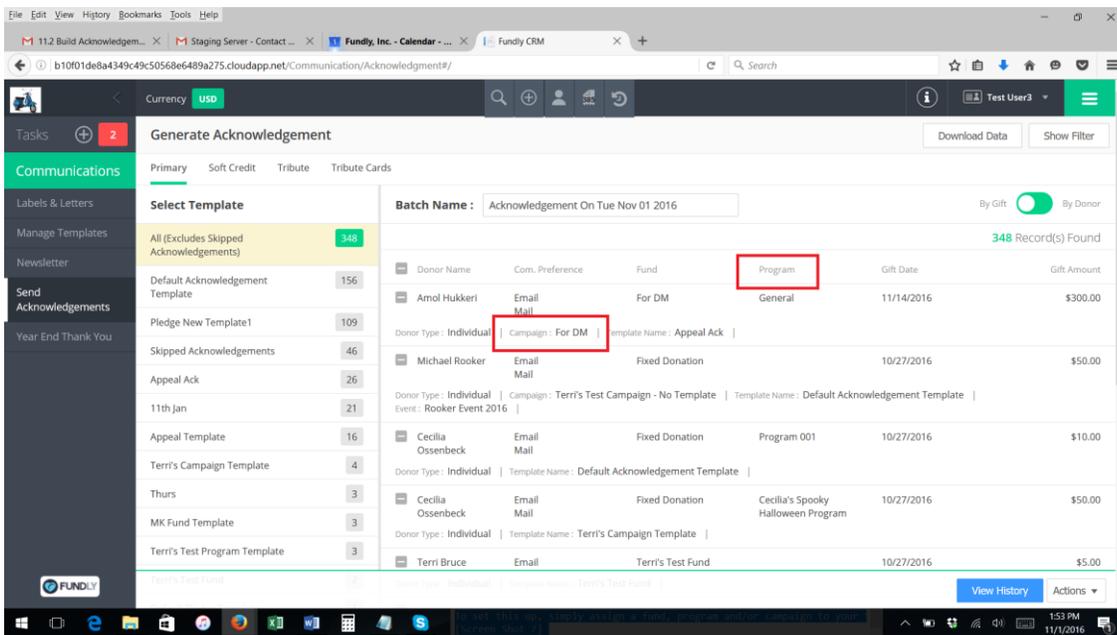
And a ton of new filters, including filtering acknowledgements by Campaign, Program, Event, Donor Type (individual or organization), Fund, Gift Source, Minimum Gift Amount, and Maximum Gift Amount Click the green "Show Filter" button in the upper right hand corner of the screen to access the filters.
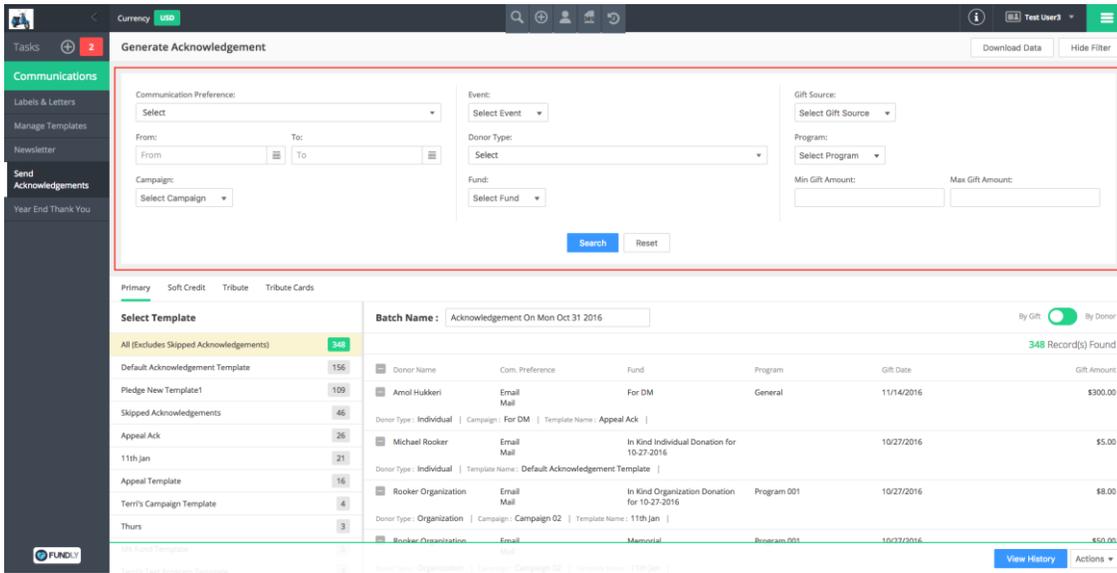
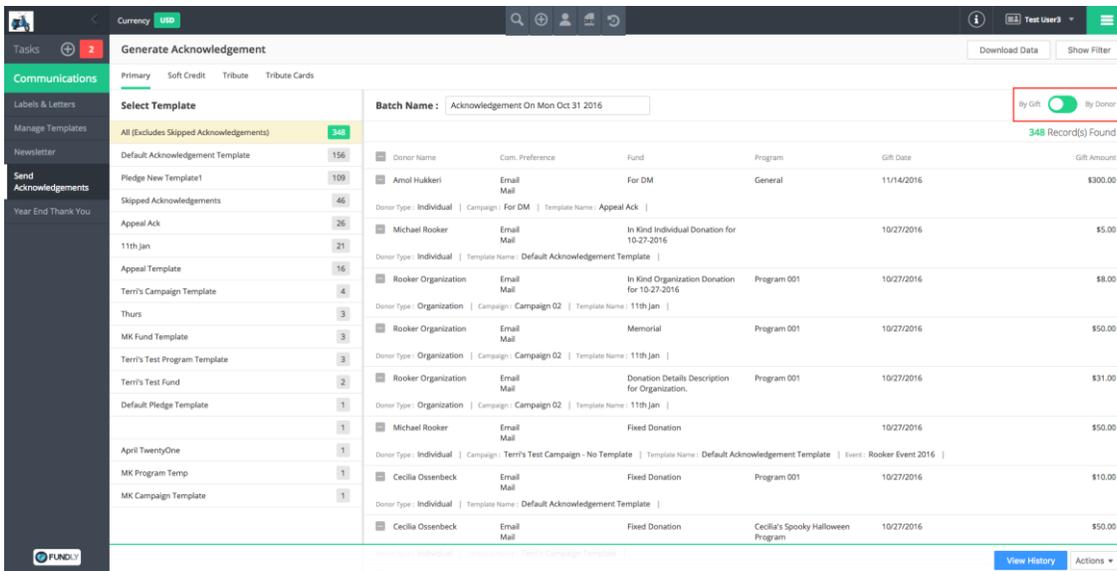Plus, users can now toggle between viewing acknowledgements waiting to be sent "By Gift" and "By Donor" right on the donation acknowledgement screen instead of going to the Settings menu.


And we know you are going to love this - we've also changed the way donation acknowledgement templates are assigned to donations. Previously, the template came from the Fund. If there was no template assigned to the Fund (in the Fund configuration), then the template came from the default Acknowledgement Template (on the Settings menu). There was no ability to assign a template based on Program or Campaign.

Well, guess what? That's right...we've added the ability for users to assign a donation acknowledgement template to Programs and to Campaigns (in the Program and Campaign configuration settings), the same as you can for a Fund!

From the Configurations menu, under Fundraising, select Campaign or Program.
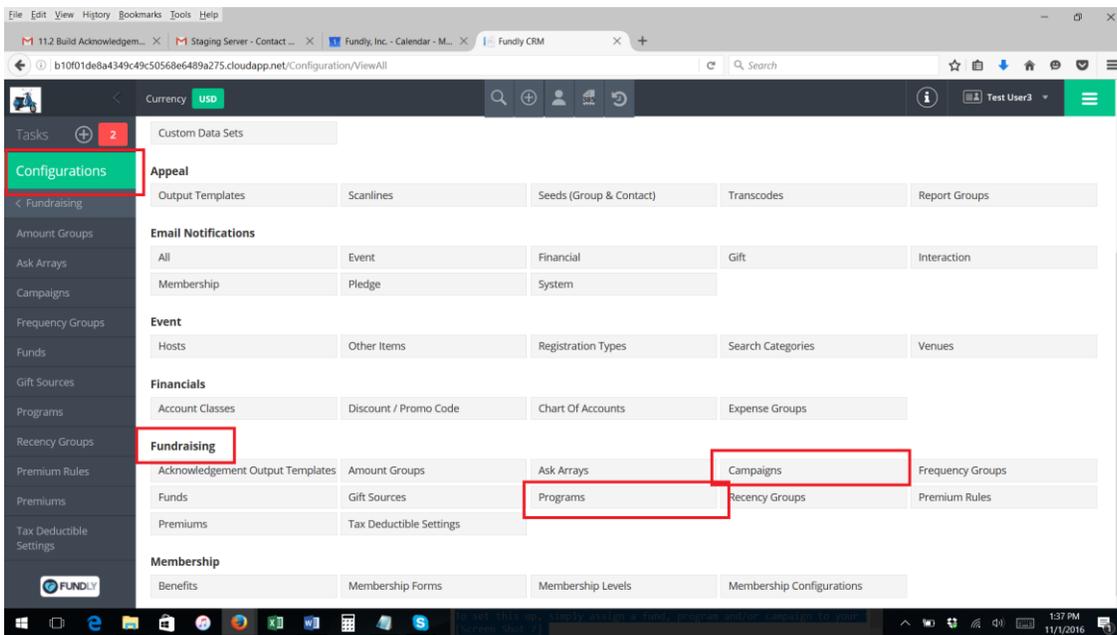
When editing or creating a new program or campaign, you will now see a new tab for "Acknowledgement Set Up"
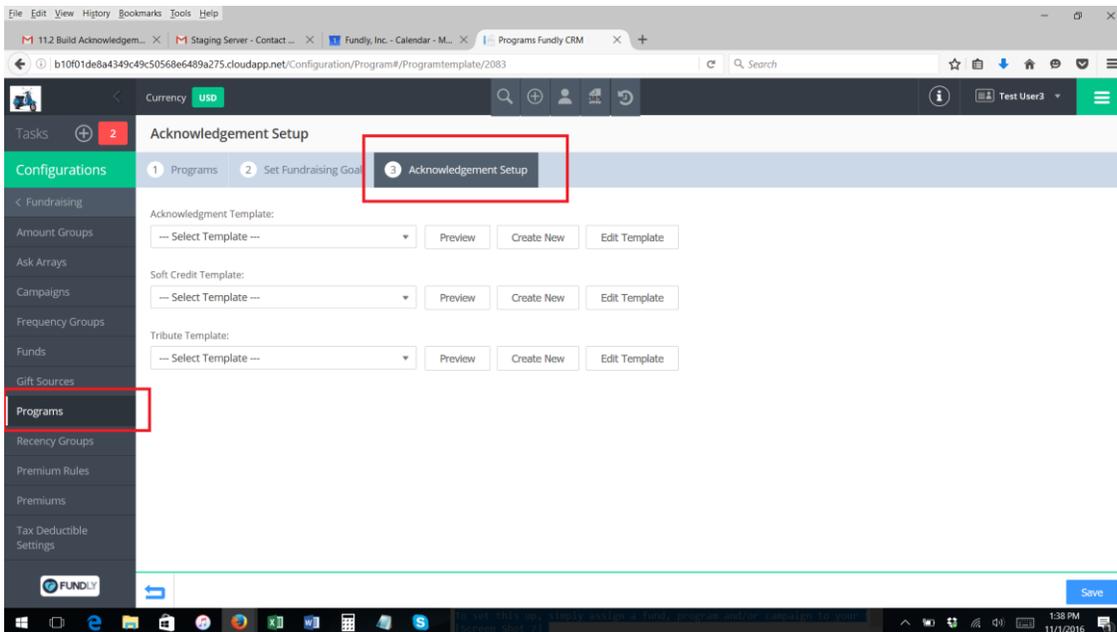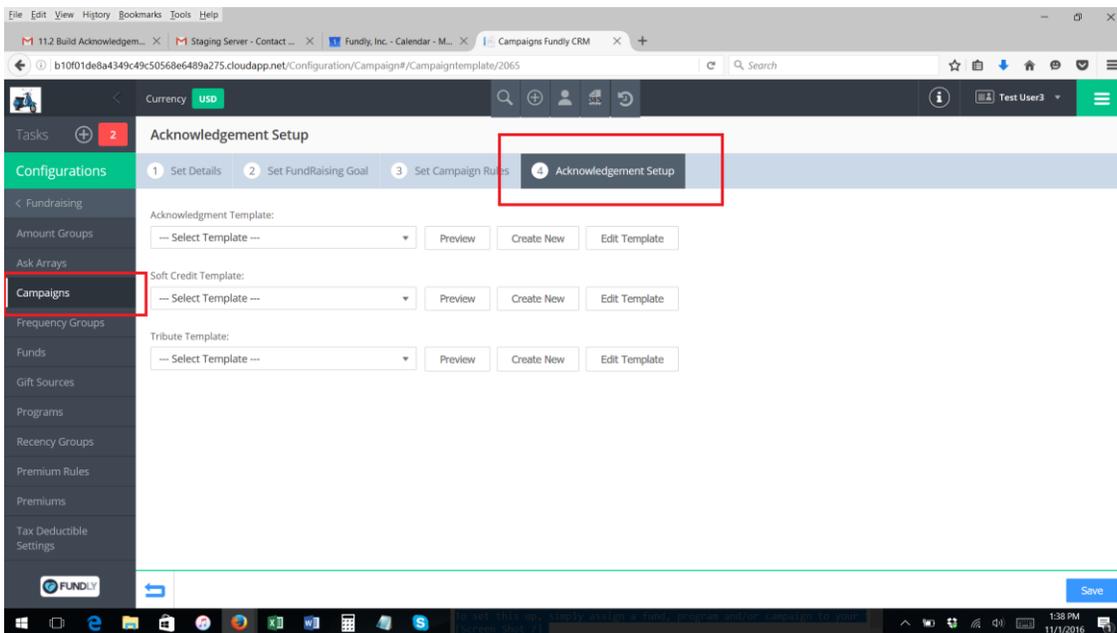
You can also assign the Fund/Program/Campaign to templates from the "Manage Templates" area of the main menu. Edit any template and select the blue "Fund(s)/Program(s)/Campaign(s) Selection" button in the upper right hand corner.
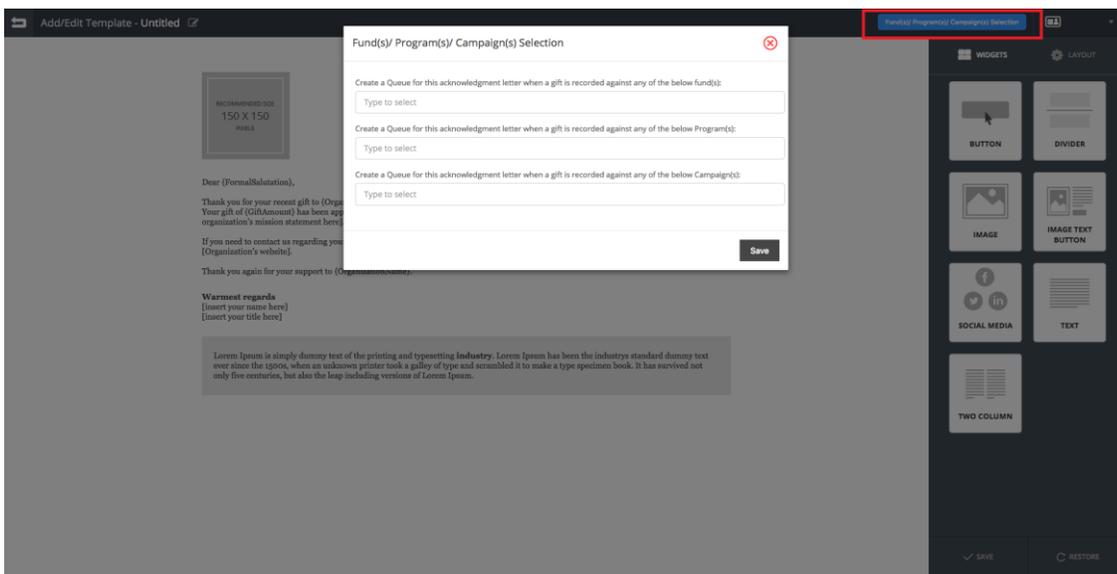
Donation acknowledgement templates will be assigned to donations based on the following hierarchy/order:
1. Program
2. Campaign
3. Fund
4. Default Acknowledgement

This means if your donation was assigned to a Program and a Campaign (and both have an acknowledgement template configured), then the donation will be assigned the Program acknowledgement template. If the donation is linked to a Campaign and both the Campaign and the Fund have an acknowledgement template configured, then the

system will use the Campaign template. Etc.

For more information, be sure to attend our "Working with Donations Quickly and Efficiently" webinar on Thursday, November 3rd at 11 AM Pacific Time (www.fundlyevent.com to register)

FUNDLY CONNECT Dashboard Link

The Dashboard link has been moved beside the user's username at the upper right corner of the public site. This will make it easier for the users to locate the Dashboard link which would direct them to their personal portals.

FUNDLY CONNECT Embed You Tube Videos on Public Sites

Paid organization/VAC admins now have the ability to embed YouTube videos on their public sites.
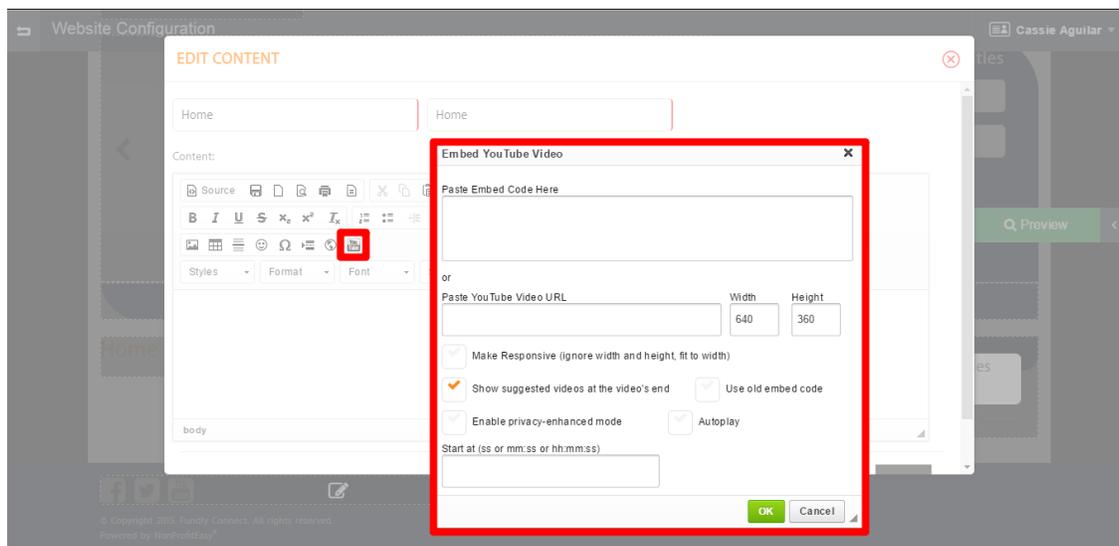
FUNDLY CONNECT CC and BCC Fields in Send Email

We've added some clarifying language on the compose/send email screen to help users understand how the "CC" and "BCC" fields work.

When composing an email, a note for CC and BCC fields explains that the CC/BCC

field(s) will send one copy for each of the recipients to the email address entered on the fields. If the user requires to receive only one copy of the email, then the recipient can be added to the 'To:' field.

The recipients entered on the CC and/or BCC fields in the email can now be reviewed when viewing the summary of the email.

Summary

| 1 Recipients | Preview |

Subject:: CC and BCC

CC:: acassie101@gmail.com
BCC:: acassie102@gmail.com

Delivered:: 9/28/2016

Open rate **100%**   Click rate **0%**

| **1** Opened | **0** Clicked | **0** Bounced (0 Hard Bounced + 0 Soft Bounced) | **0** Unsubscribed |

FUNDLY CONNECT Schedule and Shift Change

When configuring a schedule for an opportunity, adding at least one shift will be required for each individual schedule. This will ensure that a schedule is active and so the opportunity is correctly published on the website.
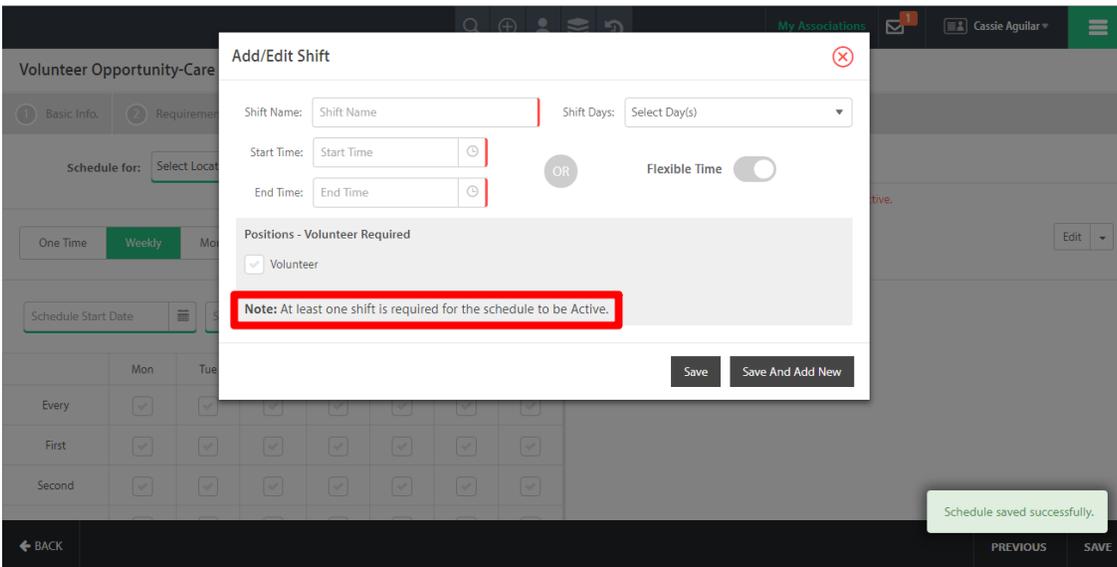
FUNDLY CONNECT Recommended Opportunities

The Recommended Opportunities listed on the volunteer portal are limited to those that are within 50 mile radius of the volunteer's address.

Recommended Opportunities

Opportunity	Organization	Location	Distance
	HandsOn Jacksonville Inc.	City Rescue Mission - Jacksonville, FL 32202	5.4
	Krumpin 4 Success, Inc	Westbrook Community Center - Jacksonville, FL 32209	5
	Community Hospice of Northeast Florida, Inc.	Default - Jacksonville, FL 32257	14.8
	Community Hospice of Northeast Florida, Inc.	Default - Jacksonville, FL 32257	14.8
	Learn to Read	Default - Jacksonville, FL 32202	5.7

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).**

FUNDLY

Getting Started with Fundly CRM

Fundly CRM

Fundly Connect

Live Demo Sign-up

NEWSLETTER

GOT AN IDEA FOR A WEBINAR?   Submit it Here!

PDT / PST   7:23 am
GMT-7 DST   Wed, Nov 2
Your Time   10:23 am
GMT-4 DST   Wed, Nov 2
Powered by WORLD TIME BUDDY

Upcoming Events

Past Events

02 NOV 2016	Introduction to Fundly Connect
	Every Wednesday from 12:00 PM to 1:00 PM Until 12/31/2017 PST

Filter By

Month

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FUNDLY CRM   FUNDLY CONNECT   FUNDLY PRO   FUNDLY ENTERPRISE