FUNDLY

Give Thanks - For 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:

- International Phone Numbers
- Print Deposited Transactions
- Organizational Information on Event Registration Forms
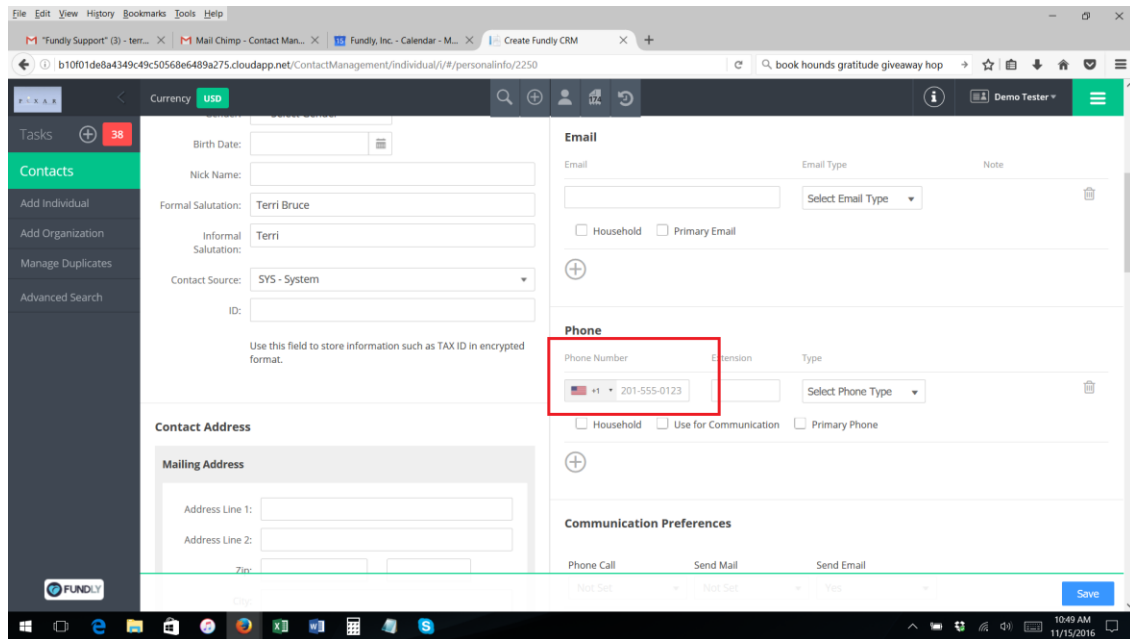
Connect:

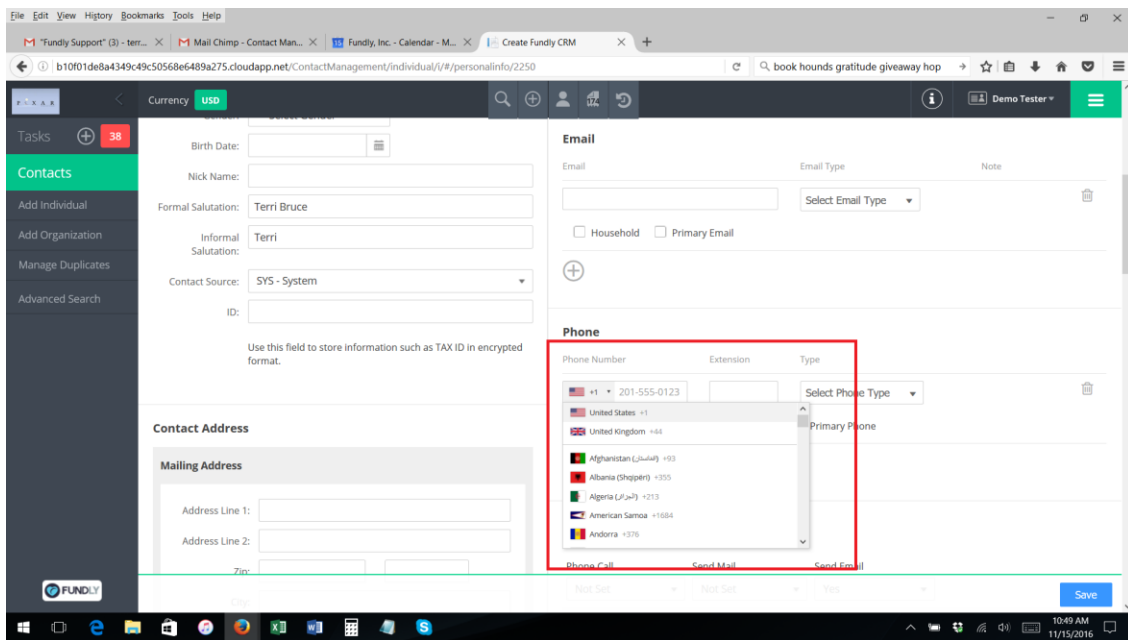- Featured Opportunities Configuration

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.
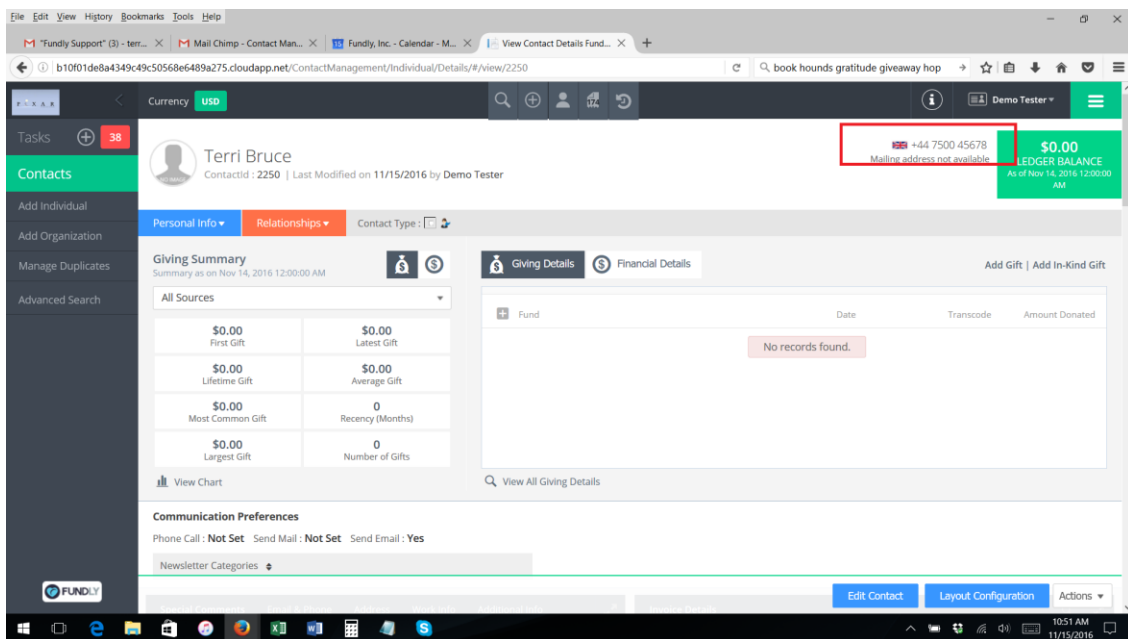
Viva la monde!

Users can now enter international phone numbers on organizational and individual contact records.

From the add/edit contact screen, select the flag/country from the drop down menu, and then enter the phone number in the appropriate format for that country.
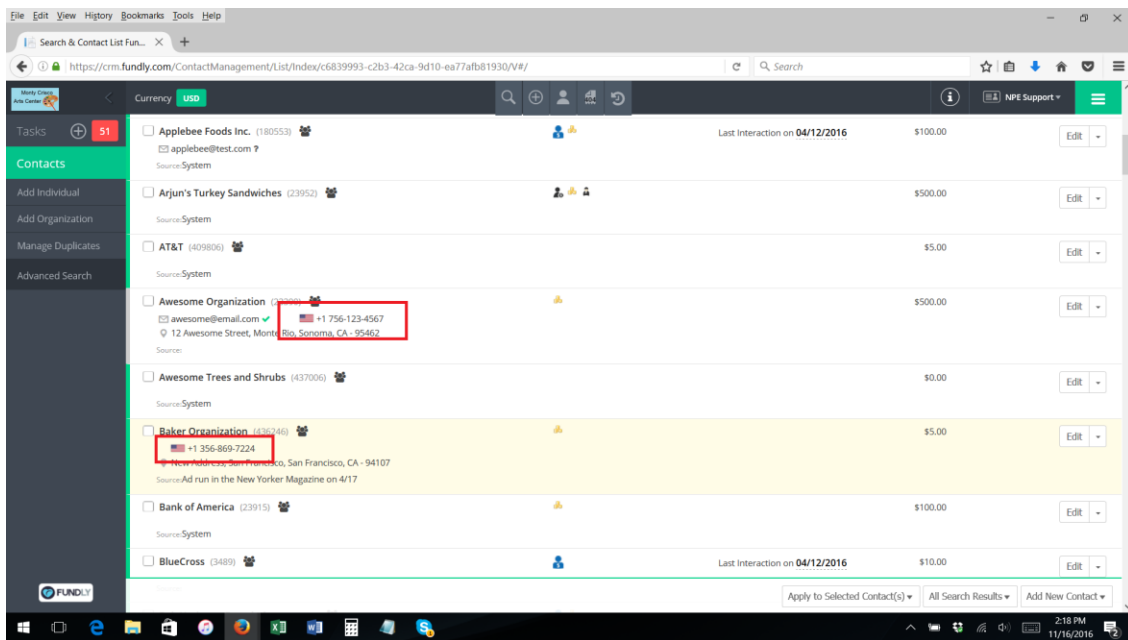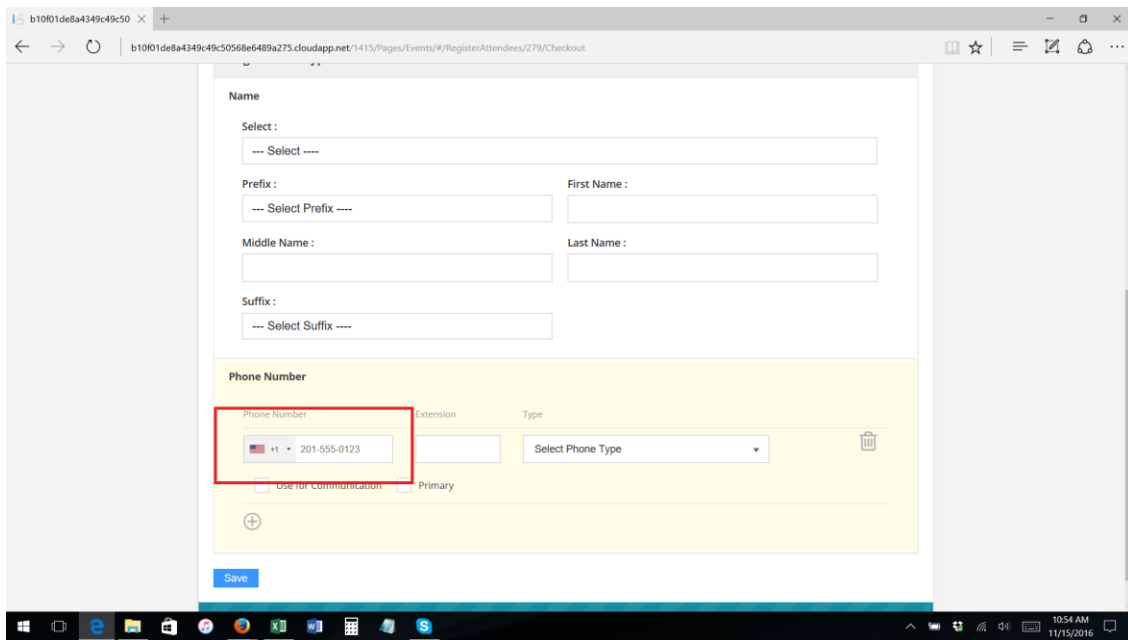
When viewing a contact's record, the flag for the country's phone number will be visible to let the user know what country the phone number is formatted for.
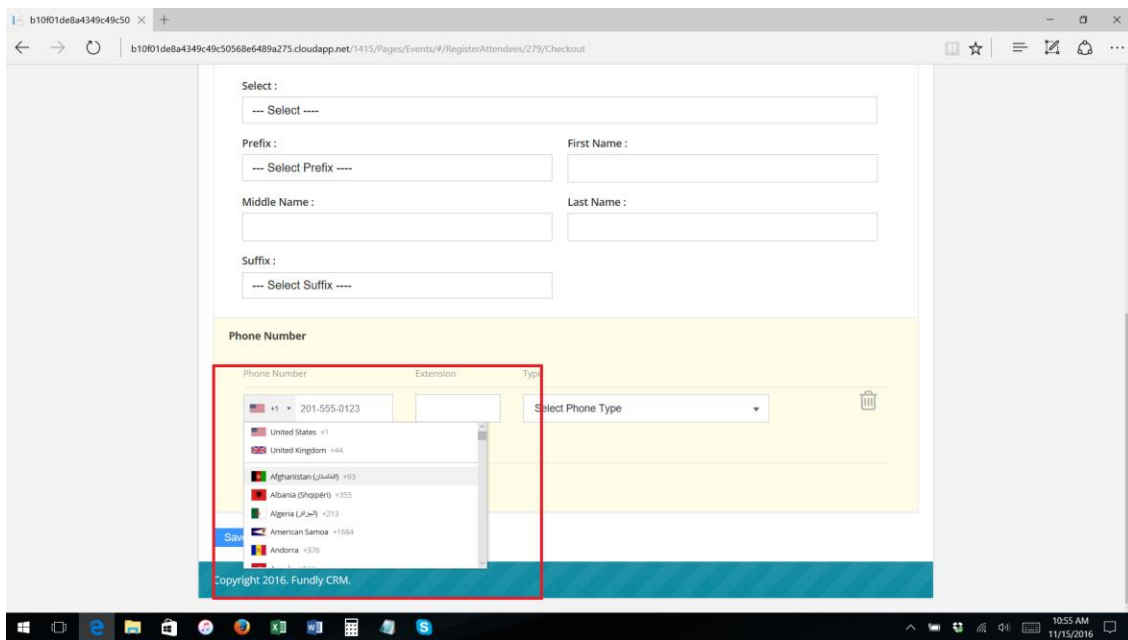

The phone number format/flag will also appear in the search results screen.

Those registering for events via pages will also be able to enter international phone numbers on event registration forms.

Print Deposited Transactions

Now we show you the money....in printable PDF format!

In the Financials module, on the Deposited Transaction tab, users now have the ability to print out the details of each deposit. Just select "print" from the drop down menu to the right of each deposit/batch. This will open a PDF file that you can print or save to your computer.

![FUNDLY CRM] **Organizational Information on Event Registration Forms**

We have made some changes to the way Organizational Information is handled by event registration forms to ensure that duplicate Work Information is not added to individual contact records.
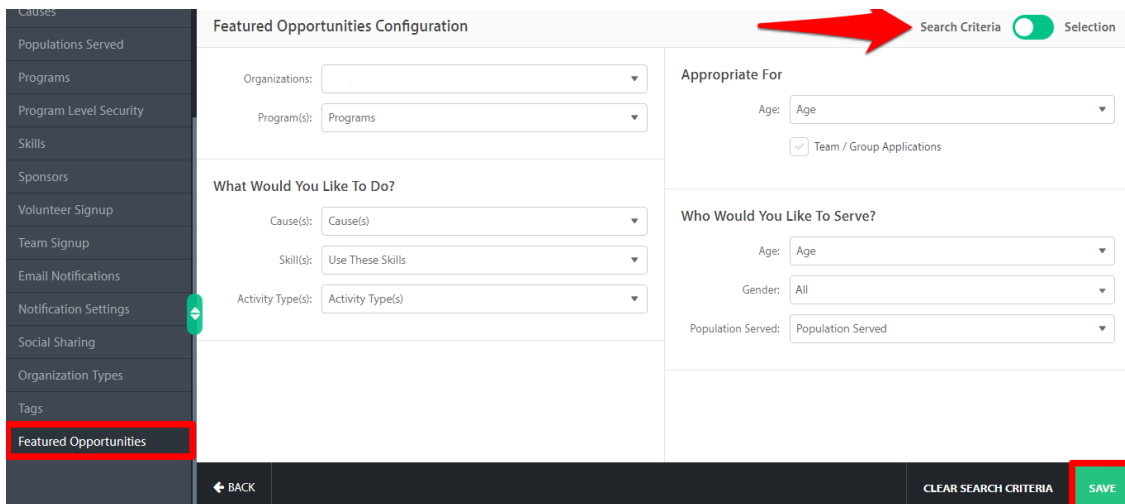
Now the Organizational Information widget/object on event registration forms uses your CRM's duplicate prevention settings. This will ensure that the system can match existing work information to the information entered via an event registration form, rather than creating a duplicate entry.

However, this also means that, if you add the Organizational Information object/widget to your event registration form, any Organizational Information fields used by your duplicate prevention settings (such as address or email) will be REQUIRED information on your event registration form (for all registrants/attendees). If only some of your event registrants/attendees will have employment/organizational information, then we suggest leaving the Organizational Information object/widget off of your registration form and using the single text or paragraph text custom fields to capture this information instead.

FUNDLY CONNECT Featured Opportunities Configuration

Users are now able to configure the Featured Opportunities posted on their public site. There is an option to either add a Search Criteria or do a Selection of opportunities.

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).**

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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 |

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