

## **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.

| File Edit View History Boo |                                  | Contact Man × 🔢 Fundly, Inc Calendar - M × 👔 Create Fund                | Iy CRM × +                |                                      | -    | - 8                   | ×          |
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| Contacts                   | Nick Name:                       |   | Email                     | Email Type                           | Note |                       | - 6        |
| Add Individual             | Formal Salutation:               | Terri Bruce   |                           | Select Email Type 🛛 👻                |      | Ŵ                     |            |
| Add Organization           | Informal                         | Terri   | Household Primary Email   |                                      |      |                       |            |
| Manage Duplicates          | Salutation:                      |   | (+)                       |                                      |      |                       |            |
| Advanced Search            | Contact Source:                  | SYS - System 💌  | 0                         |                                      |      |                       |            |
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|                            | Mailing Address                  |   | $\oplus$                  |                                      |      |                       |            |
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| asks 🕀 38           | Birth Date:           |   | Email                           |                                     |               |   |
|                     | Nick Name:            |   | Email                           | Email Type                          | Note          |   |
| ld Individual       | Formal Salutation:    | Terri Bruce   |                                 | Select Email Type 🔹                 |               | Ŵ |
| ld Organization     | Informal              | Terri   | Household Primary Email         |                                     |               |   |
| anage Duplicates    | Salutation:           |   | $(\pm)$                         |                                     |               |   |
| vanced Search       | Contact Source:       | SYS - System 💌  |                                 |                                     |               |   |
| vanced scoren       | ID:                   |   |                                 |                                     |               |   |
|                     |                       | Use this field to store information such as TAX ID in encrypted format. | Phone<br>Phone Number Extension | Туре                                |               |   |
|                     |                       |   | <b>*1 *</b> 201-555-0123        | Select Phone Type 💌                 |               | Ŵ |
|                     | Contact Addres        | c   | United States +1                | Primary Phone                       |               |   |
|                     |                       |   | Afghanistan (الساستان) +93      |                                     |               |   |
|                     | Mailing Address       |   | Albania (Shqipëri) +355         |                                     |               |   |
|                     | Address Line          | 1:  | Algeria (الجرام) +213           |                                     |               |   |
|                     |                       |   | American Samoa +1684            |                                     |               |   |
|                     | Address Line 2        |   | Phone Call Send Mail            | Send Em vil                         |               |   |
| FUNDLY              |                       | p:  | Sonn Mail                       | Sand Fina                           |               |   |

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.

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|                                    | 🔟 View Chart  |                                  | Q View All Giving Details        |  |
|                                    | Communication Preferences<br>Phone Call : Not Set Send Mail : | Not Set Send Email : Yes         |                                  |  |
|                                    | Newsletter Categories 👙                                       |                                  |                                  |  |

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

| 🖲 🔒 🛛 https://crm.fu             | Indly.com/ContactManagement/List/Index/c6839993-c2b3-42ca-9d10-ea77afb8193   | 0/V#/     | C Q Search                     |          | ☆ 自 🕹 1       | r 🗸  | 2 |
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Those registering for events via pages will also be able to enter international phone numbers on event registration forms.

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| Name<br>Select :  |                |            |          | ^     |
| Select  |                |            |          |       |
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| Phone Number Extension Type   |                |            |          |       |
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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.

| Deposit Fundly CRM | Bookmarks Iools Help                               |  |   |                                  |                |                | đ          |      |
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| ks 🕀 51            | Your application is synced with Quick              | Books. (Note: Make sure that all the transacti | ions have assigned account to sync with QuickBool | s.) Sync may take up to 30 mins. |                | Disconnect fro | m QuickBe  | ooks |
| oice               | Financials   |  |   |                                  |                |                |            |      |
|                    | FINANCIAL TRANSACTIONS                             | DEPOSITED TRANSACTIONS                         |   |                                  |                |                |            |      |
|                    | L  |  |   |                                  |                | 26 Reco        | rd(s) Fou  | uno  |
|                    | Title  | Date of Deposit                                | Total Funds                                       | Total Adjustments                | Total Deposits |                |            | _    |
|                    | Tuesday Night Deposit - Bank of<br>America Account | 10/11/2016                                     | \$1,000.00  | \$5.00                           | \$995.00       |                | Print      | •    |
|                    | Thursday's Deposit                                 | 10/6/2016                                      | \$70.00   | \$0.00                           | \$70.00        |                | Print      | ÷    |
|                    | Monies Received on 10/6/2016                       | 10/6/2016                                      | \$500.00  | (\$10.00)                        | \$510.00       |                | Print      | ÷    |
|                    | Deposit for 9/15/16                                | 09/15/2016                                     | \$140.00  | \$10.00                          | \$130.00       |                | Print      | ¥    |
|                    | Transactions for People Named<br>Abby              | 09/9/2016                                      | \$9,012.50  | \$0.00                           | \$9,012.50     |                | Print      | ÷    |
|                    | Hobey Baker Deposit                                | 09/7/2016                                      | \$179.60  | \$0.00                           | \$179.60       |                | Print      | ÷    |
|                    | August Memberships                                 | 09/1/2016                                      | \$62.50   | \$12.50                          | \$50.00        |                | Print      | Ŧ    |
|                    | 8.2  | 08/29/2016                                     | \$8,403.83  | \$0.00                           | \$8,403.83     |                | Print      | ¥    |
| FUNDLY             | Wednesday Bank Run                                 | 08/5/2016                                      | \$850.00  | \$0.00                           | \$850.00       |                | Print      | ÷    |
| FUNDLY             | Tuesday Bank Run                                   | 08/5/2016                                      | \$390.00  | \$0.00                           | \$390.00       |                | Print      |      |

# 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.

| File | Edit View History Bookmarks Tools Help                |                        |         |   |                                   |                          |                         | -        | ð    | × |
|------|---|------------------------|---------|---|-----------------------------------|--------------------------|-------------------------|----------|------|---|
| E    | Index Fundly CRM × +                                  |                        |         |   |                                   |                          |                         |          |      |   |
| (+)  | ③ ▲   https://crm.fundly.com/EventManagement/Event#/1 | 1098/FormConfiguration |         |   | C Q Search                        |                          | ☆自                      | <b>ہ</b> | ◙    | ≡ |
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| 51   | Configure Registration<br>Form                        |                        |         |   |                                   |                          |                         | Delete   | 8    |   |
|      | Sponsors  | Name                   |         |   |                                   |                          |                         |          |      |   |
|      | Other Items   | Prefix:                |         |   |                                   |                          |                         |          |      |   |
|      | Customize Tickets                                     |                        |         | Basic Fields                            |                                   |                          |                         |          |      |   |
|      | Invites<br>Event Documents                            | First Name:            |         | Name                                    | Mailing Address                   | Email Address            |                         |          |      |   |
|      | Track Expenses  |                        |         | Phone Number<br>Gender                  | Ethnicity<br>Birth Date           | Income Level             |                         |          |      |   |
|      | Notifications   | Middle Name:           |         | Attendee's Relationship with Registrant | Billing Address                   | Organization Information |                         |          |      |   |
|      |   | Last Name:             |         | Custom Fields                           |                                   |                          |                         |          |      |   |
|      |   |                        |         | Single Line Text<br>Drop Down           | Paragraph Text<br>Multiple Choice | Options                  |                         |          |      |   |
|      |   | Suffix:                |         | Custom Dataset                          |                                   |                          |                         |          |      |   |
|      |   |                        |         | Custom Dataset                          |                                   |                          |                         |          |      |   |
|      |   |                        |         |   |                                   |                          |                         |          |      |   |
|      |   |                        |         |   |                                   | Add Field 👻              |                         |          |      |   |
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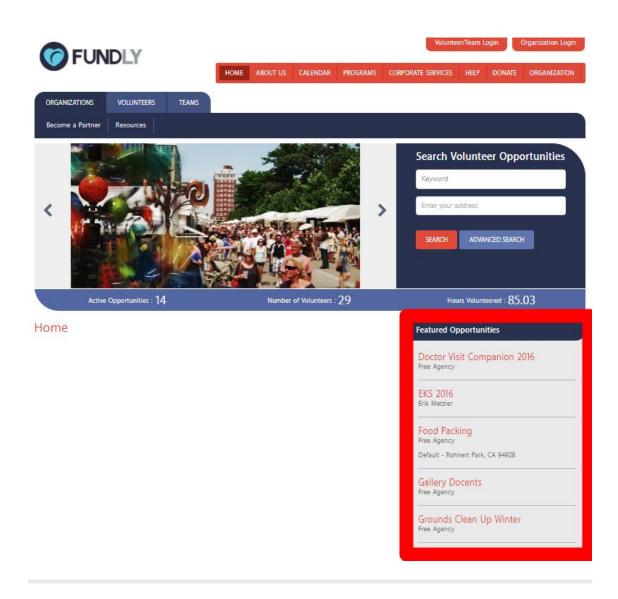
Now the Organizational Information widget/object on event registration forms uses your CRM's duplicate prevention settings. This will ensure that the system can match existing work information to the information entered via an event registration form, rather than creating a duplicate entry.

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** 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.

| Causes                 | Featured Oppor    | tunities Configuration |   | _                  |                    | Search Criteria       | Selection |
|------------------------|-------------------|------------------------|---|--------------------|--------------------|-----------------------|-----------|
| Populations Served     | r cutureu oppor   |                        |   |                    |                    |                       | Selection |
| Programs               | Organizations:    |                        | • | Appropriate For    |                    |                       |           |
| Program Level Security | Program(s):       | Programs               | • | Age:               | Age                |                       | •         |
| Skills                 |                   |                        |   |                    | Team / Group Appli | ications              |           |
| Sponsors               | What Would You    | Like To Do?            |   |                    |                    |                       |           |
| Volunteer Signup       | Cause(s):         | Cause(s)               | • | Who Would You      | Like To Serve?     |                       |           |
| Team Signup            | Skill(s);         | Use These Skills       | • | Age:               | Age                |                       | •         |
| Email Notifications    | SKII(S):          |                        | • | Gender:            | All                |                       | •         |
| Notification Settings  | Activity Type(s): | Activity Type(s)       | • | Gender:            | All                |                       | •         |
| Social Sharing         |                   |                        |   | Population Served: | Population Served  |                       | •         |
| Organization Types     |                   |                        |   |                    |                    |                       |           |
| Tags                   |                   |                        |   |                    |                    |                       |           |
| Featured Opportunities |                   |                        |   |                    |                    |                       |           |
|                        | 🗲 ВАСК            |                        |   |                    |                    | CLEAR SEARCH CRITERIA | SAVE      |



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 <u>fundlyevent.com</u> (there's a link at the top of the page).

|                                    | GOT AN IDEA FOR A<br>WEBINAR?   | PDT         PST         7:23 am           out12 DST         Yead Nex 2         Yead Nex 2           Your Time<br>GMT4 DST         10:23 am         West, Nex 2 |
|------------------------------------|---|--|
| Getting Started with Fundly<br>CRM |   | Powered by WORLD TIME BUDDY  |
| Fundly CRM                         |   |  |
| Fundly Connect                     | Upcoming Events   | Filter By  |
| Live Demo Sign-up                  | Past Events   | Month  |
| NEWSLETTER                         | 02 Introduction to Fundly Connect<br>NOV 2016 Every Wednesday from 12:00 PM to 1:00 PM Until 12/31/2017 PST | K 2016<br>Jan Feb Ma   |



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