



## Great New Things From Fundly CRM & Fundly Connect...

### The Season of Giving Brings 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:

- Ask Arrays in Quick Add Donations
- Using Saved Searches in Reports

#### Connect:

- Volunteer 'Joining Date' as Filter

Read on for all the details!

*(if images are not displaying correctly in this email, you can find a copy of this newsletter in our Connect and CRM v2 Support Libraries)*

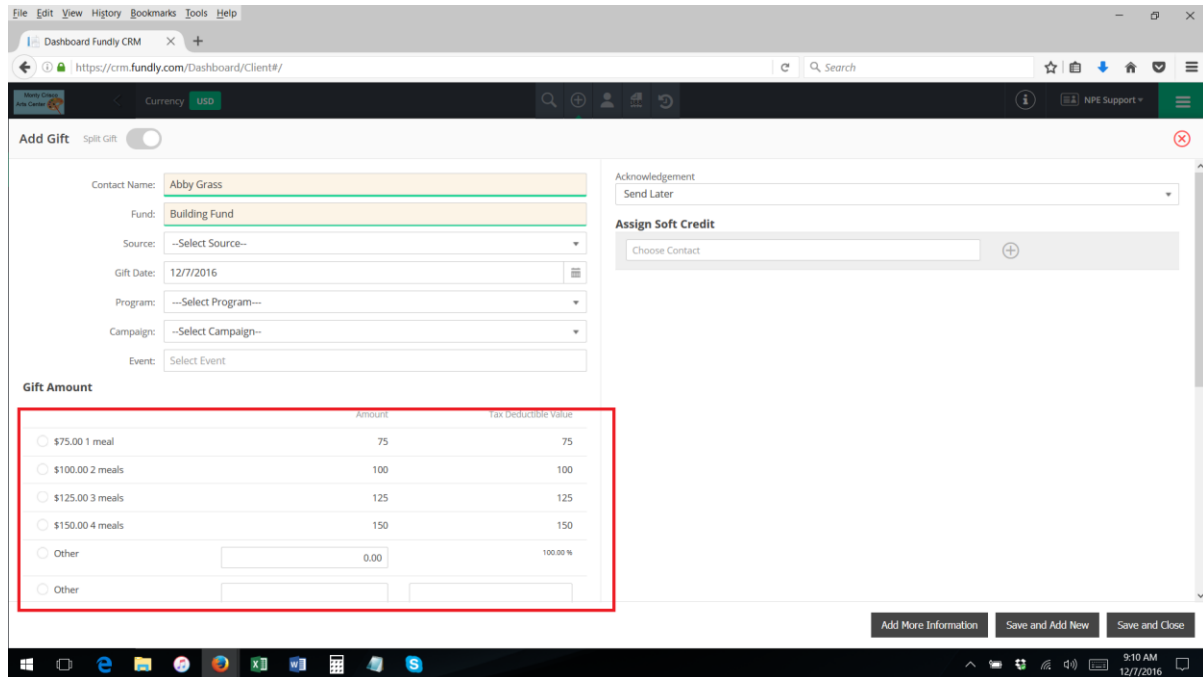
***With the release of a new build, users may experience some irregularities in their CRM or Connect account such as the appearance of strange code, blank screens/modules, lack of word wrapping, etc. These issues are related to the need to clear your browser cache and/or to log out and back in to the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



**Ask Arrays Now In Quick Add Donation**

You asked and we listened!

Configured Ask Arrays (tiered/pre-set suggested donation amounts) now show in the Quick Add Donation screen. Previously, these were only viewable (on the back end) when using the Invoices/full Add Donation screen.

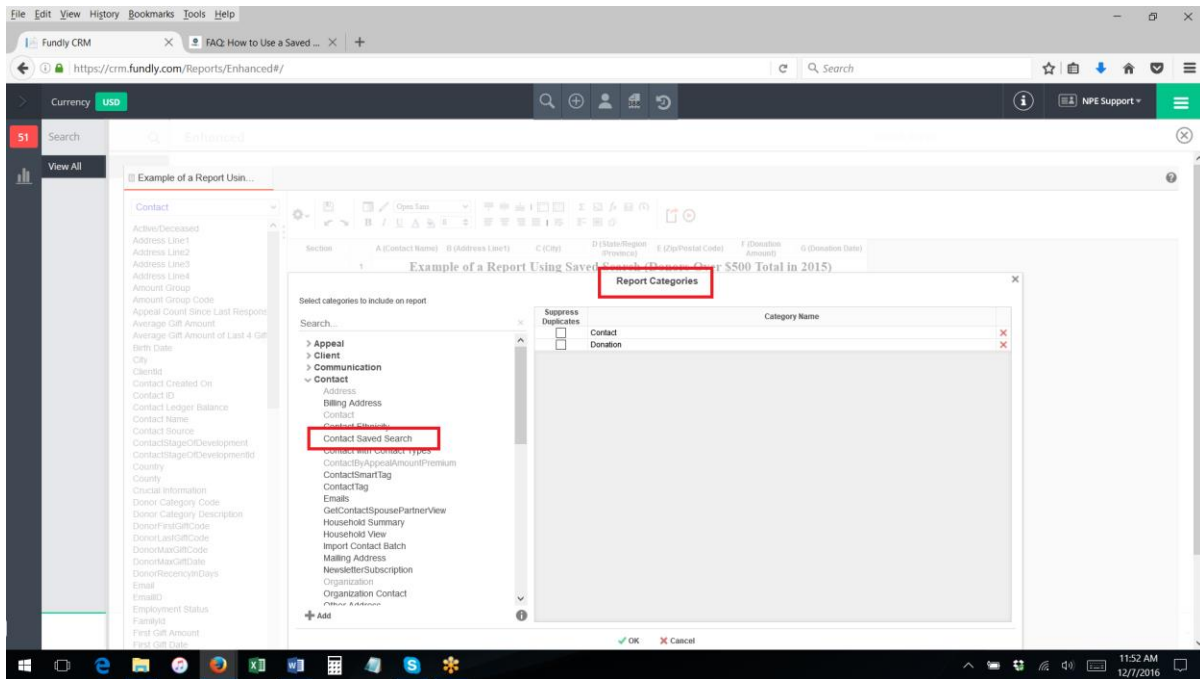


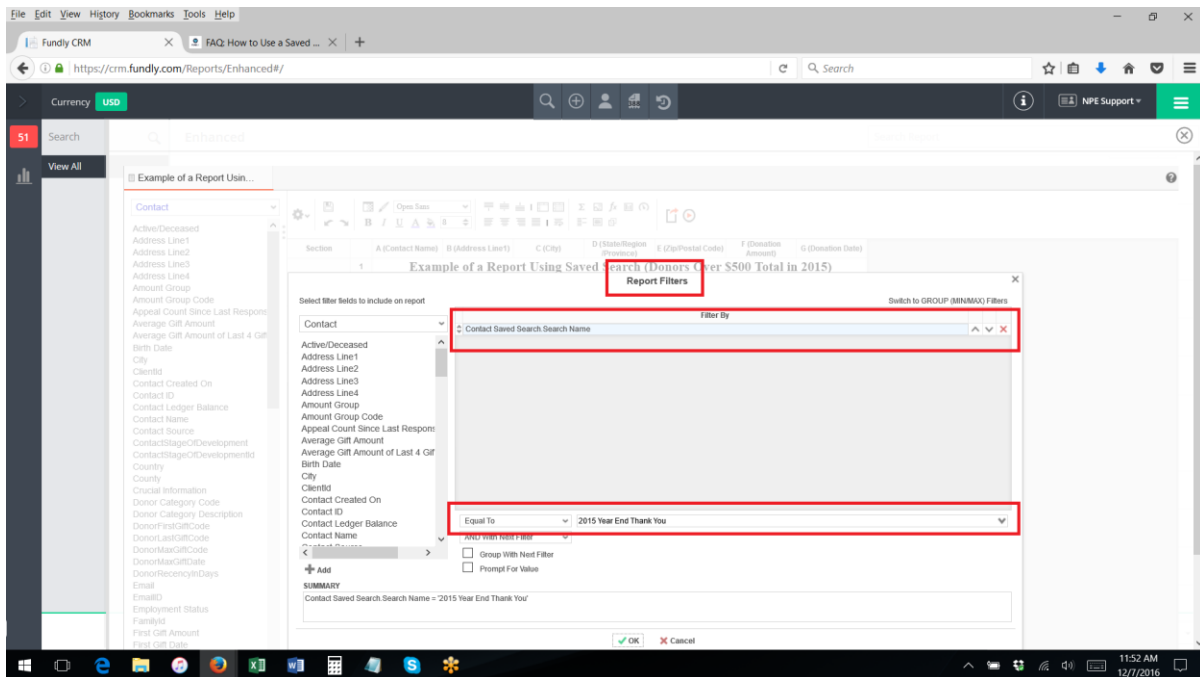
For those wanting more information on how to configure and use Ask Arrays, we have added more detail to [the "Configuration:Ask Array" tutorial in the Support Library](#), and we have uploaded a recording of our recent "Year End Thank Yous, Ask Arrays, and Donation Premiums" webinar to the Support Library as well.



## Using Saved Searches in Reports

Users now have the ability to use Saved Searches as filters in their reports. Rather than setting up filters/criteria in the report, the user can simply select a Saved Search and the report will use that Search's criteria as the report's filters/criteria. Users simply need to add the "Contact Saved Search" table to the report's Categories, add the "Saved Search Name" field to the report's Filters, and set the criteria as "equal to" and select the Saved Search's title/name from the list..





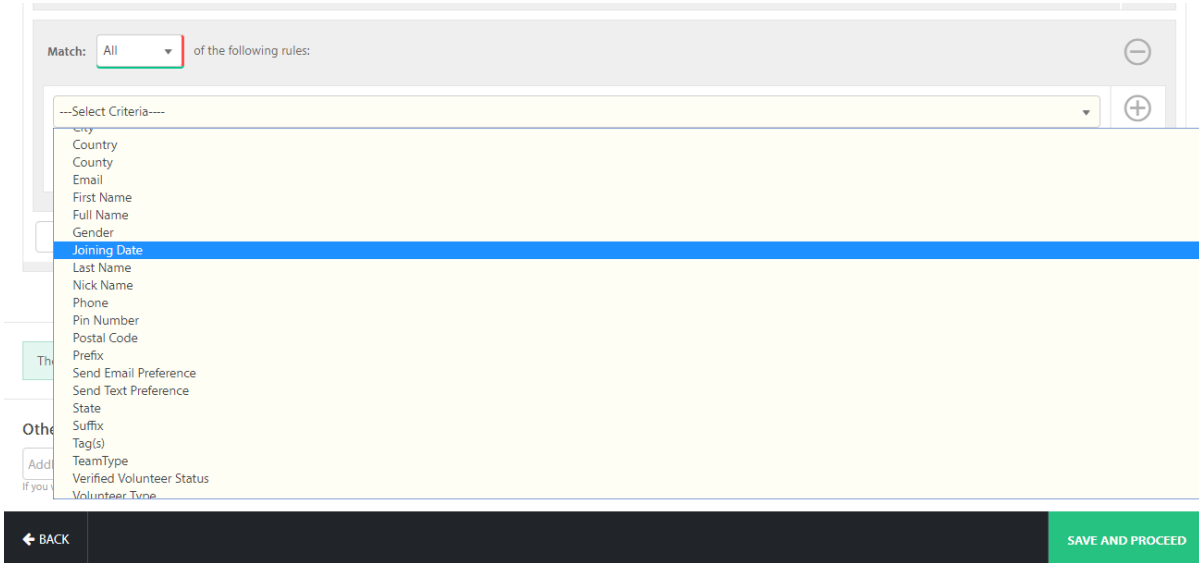
Why would you want to do this, you ask? Because there are some reports that are extremely difficult to write within Exago - such as filtering on null values, filtering on math/summations, and filtering OUT contact types. These filters are extremely easy to write within Advanced Search, however. By writing these filters/criteria in a Saved Search and then dropping the Saved Search into the report, the user is able to get around these limitations.

Intrigued and want to learn more? We've provided [a complete written and video tutorial](#) in the Reports section of our Support Library (we've added several other helpful report-related tutorials in recent weeks so be sure to swing by and check them all out). **We will also be covering this new feature in our "Year End Reports that Dazzle and Amaze" webinar on Thursday, December 8th at 11:00 am PST. Sign up at [fundlyevent.com](http://fundlyevent.com).**

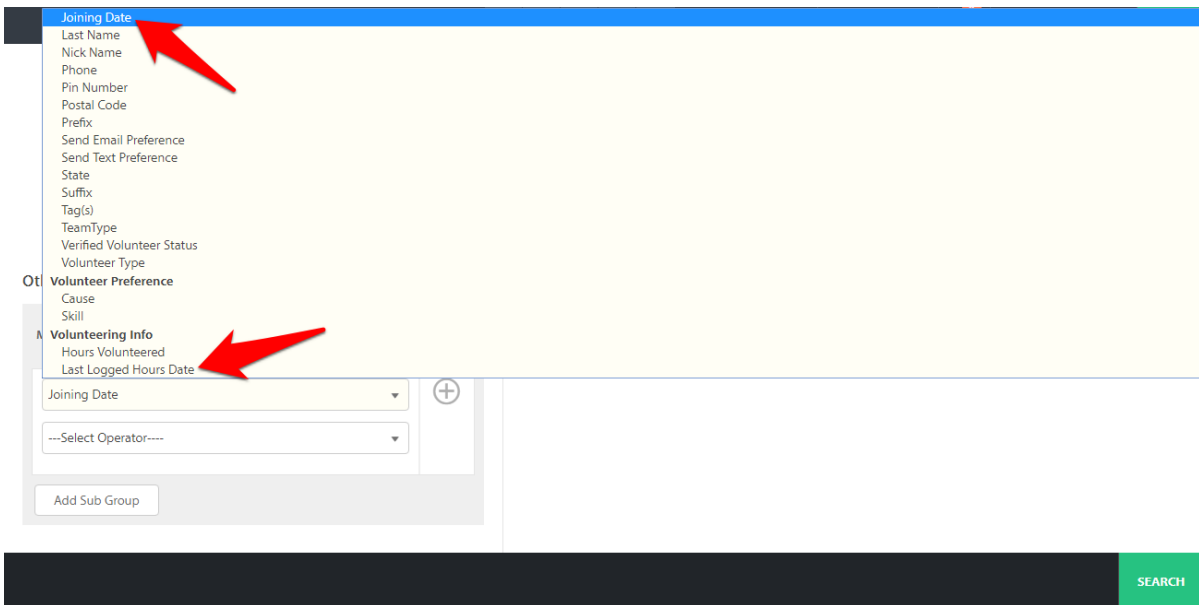
We also encourage you to attend our weekly **Reporting Huddle** (Mondays at 12:00 pm PST/3:00 pm EST), even if you don't have a particular reporting question. The first fifteen minutes of every huddle is a demonstration of some aspect of the reports module, and users can learn many tips, tricks, and shortcuts by attending these fifteen minute demos. We also have clients who attend every week just to learn from the questions other participants are asking. The weekly Reporting Huddle is a great peer-to-peer learning opportunity, as well as an opportunity to learn how to construct reports based on real-world scenarios. The Reporting Huddle does require pre-registration, which can be done at [fundlyevent.com](http://fundlyevent.com).

It is now easy to filter your most recent volunteers by using our newest filter which is the 'Joining Date'.

### Newsletter:



### Volunteer Advanced Search:



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](http://fundlyevent.com)), live help drop in sessions, and email support ([support@fundly.com](mailto:support@fundly.com)).

**If you'd like to suggest a webinar or training topic, submit it at [fundlyevent.com](http://fundlyevent.com) (there's a link at the top of the page).**

---



*Copyright © 2016 Fundly, All rights reserved.*

You are receiving this email communication as a valued opt-in Fundly user.

**Our mailing address is:**

Fundly  
1300 Valley House Drive, Suite 100-41  
Rohnert Park, CA 94928

[Add us to your address book](#)

[unsubscribe from this list](#) [update subscription preferences](#)