

FUNDLY CRM

is an all-in-one technology solution for nonprofits that is scalable, flexible, and rich with features.

TOP DIFFERENTIATORS

Robust donor management – ability to segment donors and create targeted asks/appeals

The only CRM in its class to fully integrate wealth profiles into contact records with Donor Search

Powerful membership management module lets you offer group or single memberships, gifting and transfer of memberships in multiple currencies as well as management and fulfillment of memberships perks.

Full event management including waitlisting and private invite only events.

Integrate donations, event registration, and membership sign up with your website

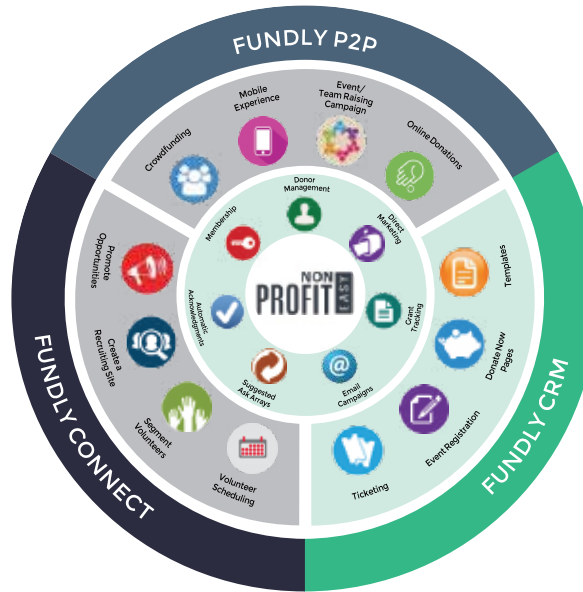
Send individual or group emails from within the system and track communication history

Exclusive opportunity to bring sustainable fundraising to your mission through our partnership with The Eight Principles

Integrate with Fundly Connect, the volunteer management system of choice for some of the nation's largest nonprofits

Integrate P2P, Crowdfunding Campaigns and your Race events seamlessly

Unlimited email support plus daily free webinars/trainings, and live drop-in help sessions



POWERED BY:

NonProfitEasy

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Petaluma, CA 94952

fundly.com

fundlyconnect.com

fundlycrm.com

fundly.com/enterprise

fundly.com/pro



REVOLUTIONIZING SOCIAL IMPACT



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NAMED AS A BEST DONOR MANAGEMENT SYSTEM BY



"...interface is clean and attractive."

"...system is highly customizable."

FUNDLY CRM FEATURES

Contacts

- Track individual and organizational contacts
- Use custom data sets to customize captured data
- Add flags and/or keywords to records with tags
- Create Smart Tags that assign flags to records automatically
- Create and assign contact types
- Create relationships between contacts and indicate shared communication information (address, phone number(s), and email address(es))
- Add profile pictures and copies of documents to contact records

Donor Management

- Track donations, pledges, and grants - including recurring payments
- Process matching donations
- Track online and offline donations
- Automate donation acknowledgments for online donations
- Customize acknowledgment letters by program, campaign, and/or fund
- Print or email acknowledgments directly from the system
- Accept credit card payments via our integration with Stripe*
- Track donor prospects at every stage of development
- The only CRM in its class to fully integrate wealth profiles into contact records with Donor Search
- Set interactive donation asks based on giving history for online and e-appeal donations
- Process donations in multiple currencies
- Automate the process of identifying and requesting employer matching gifts with our 360MatchPro integration
- Streamline online giving with our mobile-optimized, fast checkout with e-appeals
- Use A/B testing and donor segmentation to increase donations

Events/Ticketing

- Create and manage an unlimited number of events
- Review registration trends across all events
- Incorporate barcodes for easy check-in
- Accept donations at event registration
- Assign sponsors and sponsorship levels
- Configure custom registration forms
- Manage wait lists and email or print tickets
- Log event expenses
- Quick ticketing feature -- sell tickets at the door--mobile compatible

Memberships

- Create multiple membership levels and multiple prices for each level
- Customize registration forms
- Upgrade/downgrade members' membership levels and transfer memberships between contacts
- Create recurring memberships and auto renewals
- Designate members-only pricing in shopping cart
- Ability to create both organizational memberships and individual memberships

Pledges/Grants Management

- Schedule recurring pledges
- Process pledges automatically
- View history of pledges including upgrades and downgrades
- Create batch pledge entries
- Manage grant applications from application to close out
- Allocate grant payments to specific programs
- Ability to write custom reports on grant records

Task and Interaction Capabilities

- Track interactions with contacts--phone calls, emails, letters and more!
- Create and manage a to-do list from within the system
- Set follow-up tasks and assign to team members
- Set deadline reminders--in-system pop up notices and/or email reminders

Reporting

- The only CRM to integrate a world-class Business Intelligence Tool.
- Over 170 out-of-the-box reports across all categories & modules
- Extensive custom reporting capabilities
- Every single field, even custom data sets, are reportable
- Create your own drillable dashboards
- Schedule reports for automatic delivery
- Run your reports in interactive HTML, CSV, Excel, PDF and RTF formats
- Filter reports, highlight data on reports, and change the report sort order "on the fly" with the Interactive HTML - analyze data quickly and easily without editing and re-running reports

INTEGRATIONS AND ADD-ONS

DONOR SEARCH - The only CRM in its class to fully integrate wealth profiles into contact records. Takes the guesswork out of fundraising, making it easy to find hidden major gift prospects in your donor list

MAILCHIMP - For those looking to harness the power of MailChimp, we are proud to offer two-way integration

WORDPRESS - Complete integration of every module into WordPress

INTUIT QUICKBOOKS - Up-to-date information on every donation, registration, or payment

MORWEB - One of the best and easiest website content management systems out there. Empowers non-technical users to make changes directly on their website using drag and drop and click and type editing

GOOGLE MAPS - Integrates Google Maps in a number of different ways to make data entry and event location listing easy

UJOIN - A first of its kind app that gives you the same advocacy tools used by policy pros, along with some brand new innovations

SMARTY STREETS - Deep integration with one of the easiest to use address verification tools on the market

360MATCHPRO - Automate the process of tracking and requesting employer matching gifts with our 360MatchPro integration

WEBSITE INTEGRATION

Three ways to integrate your Fundly CRM with your website:

- > WordPress plug-ins for your WordPress site
- > Just need Newsletter Subscription, Donation and Event Integration? Your Fundly CRM now comes with a subscription to MorWeb CMS (www.morweb.org). Build beautiful responsive websites with the best in class drag and drop interface. Number of included Pages for your site depends on the subscription level.
- > Donation Widget--generate HTML script that creates a donation widget on any page

Accept donations, membership sign ups, and event registrations via your website - all data goes directly into your Fundly CRM!

POINT-OF-SALE (POS) APP FOR IOS

Integrates with Square Register and CardFlight / Star Micronics mPoP Register*

Process Donations, Memberships, Event Registrations, Merchandise Sales, and more

* Service fees and credit card processing fees apply.