



Fundraising and Engagement

for Dynamics 365 Sales, a Microsoft solution built with
MISSION CRM

Test Drive Walkthrough Guide

Published: October 21, 2020

Release Version: v1.0

Overview

Fundraising and Engagement for Dynamics 365 Sales, a Microsoft solution built with MISSION CRM, helps nonprofits modernize donor and constituent engagement to increase mission impact.

Fundraising and Engagement allows nonprofits to better understand their supporters, rapidly grow the amount and number of donations, strengthen overall revenue management, and more precisely target and personalize communications. A more proactive, strategic nonprofit team will identify special funding opportunities and major gift prospects while increasing donor loyalty and lifetime giving. By eliminating manual work of nonprofit staff, nonprofit organizations experience greater fundraising efficiency and cost savings that directly translate into greater time spent on programs and mission delivery. From faster monthly recurring gift management to data processing and imports driven by Azure, move your nonprofit staff from reactive to strategic.

Test Drive is a read-only experience of Fundraising and Engagement. Test Drive allows users to explore Fundraising and Engagement with read-only permissions for up to 30 days. This guide will orient you to the nonprofit user flows you can experience through Test Drive (and point out functionality that is available with a full deployment that is not available in the Test Drive experience). Users will leverage sample data and existing contact, account, and household records to experience Fundraising and Engagement.

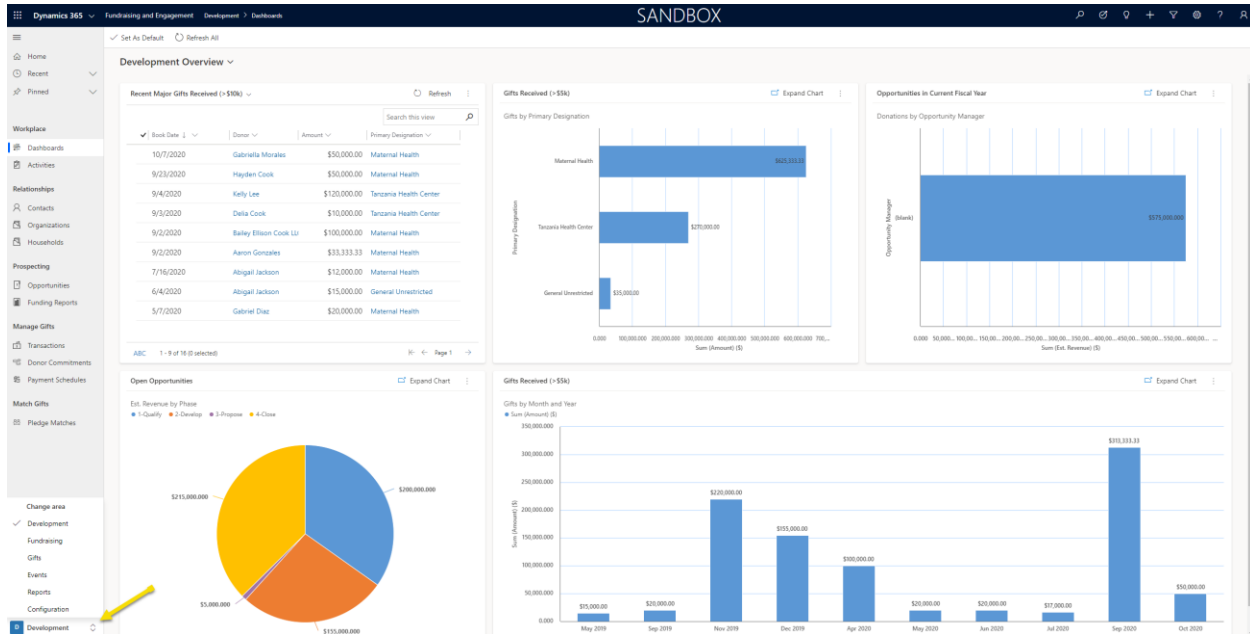
Please take note that the following functionality, workflows, and business logic is of a limited nature within Test Drive to ensure the highest level of security and privacy by users interacting with a non-production level Fundraising and Engagement solution. This functionality is included in “view” mode to Test Drive users in order to help users experiencing Fundraising and Engagement for the first time to the breadth and depth of capabilities available to their nonprofit organization.

- Event registration
- Creating recurring gifts and pledge schedules
- Booking a transaction
- View-only ribbon buttons (non-responsive to clicks in this Test Drive experience)



For Directors of Development/Fundraiser


Let's start with how Fundraising and Engagement may be used by a **Director of Development or Fundraiser**.






After logging in, navigate to the **Development** module and see the Development Overview dashboard. The Development Overview dashboard provides a snapshot of the organization's major giving program and critical milestones, including Recent Major Gifts, Gifts by Designation, and Opportunities.



Users can zoom in and see the most recent gift from Gabriella Morales. From the dashboard, easily navigate into Gabriella's contact record.




Recent Major Gifts Received (>\$10k)  Refresh 

Search this view 

 Book Date 	Donor 	Amount 	Primary Designation 
10/7/2020	Gabriella Morales	\$50,000.00	Maternal Health
9/23/2020	Hayden Cook	\$50,000.00	Maternal Health
9/4/2020	Kelly Lee	\$120,000.00	Tanzania Health Center
9/3/2020	Delia Cook	\$10,000.00	Tanzania Health Center
9/2/2020	Bailey Ellison Cook LLC	\$100,000.00	Maternal Health
9/2/2020	Aaron Gonzales	\$33,333.33	Maternal Health
7/16/2020	Abigail Jackson	\$12,000.00	Maternal Health
6/4/2020	Abigail Jackson	\$15,000.00	General Unrestricted
5/7/2020	Gabriel Diaz	\$20,000.00	Maternal Health

ABC

1 - 9 of 16 (0 selected)

  Page 1 

Gabriella's contact record provides users with a wealth of information right from the Summary page. It shows:

1. The major gift opportunity for Gabriella
2. A snapshot of Gabriella's giving recently and over time
3. A snapshot of Gabriella's household giving
4. Gabriella's company
5. Gabriella's household
6. Gabriella's primary membership
7. Gabriella's giving level

Dynamics 365 Fundraising and Engagement | Development > Contacts > Gabriella Morales

SANDBOX

Update Address | Add Gift | Add Membership | Add Registration | Add Pledge Match | Add Credit Card | Update Credit Card | Add Bank Account | Update Bank Account | Email a Link | Refresh | Run Report

Gabriella Morales
Contact

Donor Primary Constituent Type

Summary | Details | Address Details | Address Changes | Donation Information | Administrative | Related

CONTACT INFORMATION

Constituent Number: CON-1162

First Name: Gabriella

Last Name: Morales

Salutation: Mrs.

Suffix: ---

Informal Salutation: Gabriella Morales

Formal Salutation: Mrs. Gabriella Morales

4 Company: Fourth Coffee.

5 Household: Morales/Carmack Household

Household Relationship: Primary Household Member

Job Title: VP, Business Development

Birthday: 1/25/1983

Deceased?: No

6 Primary Membership: Annual Supporting Members

7 Giving Level: Visionary

VIP: False

CONTACT DETAILS

Email: gabriella.morales@myemail.com

Alternate Email: ---

1 Morales - Carmack Family Maternal Health

In Solicitation: Close

Days in Solicitation: 4

Potential Amount: \$25,000.00

2 RECURRING GIFT: NEXT: SEP 16, LAST: AUG 11, \$100.00

LAST GIFT AMOUNT: OCT 7, 2020, \$10.00

LIFETIME GIVING: OCT 7, 2020, \$261,846.00

INFLUENCED: 1, \$2,000.00

LAST GIVING CHANNEL: PHONE

MEMBERSHIP: OCT 7, 2021, Annual Supporting Members

3 Household Details

Gabriella Morales | Blaine Carmack

DIRECT CONTRIBUTIONS: \$261,846.00

MAJOR DONATION: SEP 30, 2020, \$25,000.00

HOUSEHOLD GIVING: \$261,946.00

FIRST/LAST GIFT: \$4,500.00 on MAY 01, 2020 By Gabriella Morales; \$10.00 on OCT 07, 2020 By Gabriella Morales

SUPPORTING OBJECTIVES

Maternal Health | Maternal Health

Tanzania | Maternal Health

Timeline

Get started

Capture and manage all records in your timeline.

The tabs across the top provide more detailed information on Gabriella including her giving details, address information, and any other information related to Gabriella including event registrations.

Users can take a deeper look at Gabriella's household giving trends and member make up by clicking on her household (#5).

Morales/Carmack Household
Account - Fundraising: Household

ACCOUNT INFORMATION

Household Number: ACC-1008

Account Type: Household

Household Name: Morales/Carmack Household

Household Salutation: ---

Informal Salutation: Gabriella Morales

Formal Salutation: Mrs. Gabriella Morales

Phone: ---

Address 1: Street 1: 8126 Velth Avenue

Address 1: Street 2: ---

Address 1: Street 3: ---

Address 1: City: Anchorage

Address 1: State: Alaska

Address 1: ZIP: ---

Address 1: Country/Region: USA

Description: ---

HOUSEHOLD DETAILS

Gabriella Morales | Blaine Carmack

DIRECT CONTRIBUTIONS
\$261,846.00

MAJOR DONATION
SEP 30, 2020
\$25,000.00

HOUSEHOLD GIVING
\$261,946.00

FIRST/LAST GIFT
\$4,500.00 on Mar 01, 2020
By: Gabriella Morales
\$10,000 on OCT 07, 2020
By: Gabriella Morales

HOUSEHOLD MEMBERS
2

LAST COMMUNICATION

HOUSEHOLD MEMBERS

Group By: (no grouping)

✓ Last Name | First N... | Household ... | Email | Last Trans...

Morales Gabriella Primary H... gabriella... 10/7/2020

Carmack Blaine Member blaine@b... 1/1/2019

Timeline

Search timeline

Get started

Capture and manage all records in your timeline.

The Morales/Carmack Household account is a Household Account Type (#1) which is different than an Organization Account Type.

On the Household account form, users can immediately see the household snapshot (#2) that provides an understanding of the giving across the whole household. It also provides a snapshot of each household member's contributions.

The Household account form also lets users indicate the primary member of the household (#3), the household salutation, informal and formal salutation (#4), and the household address. This information is critical to understanding how to communicate with the household and how they have contributed to the organization.

By navigating back to Gabriella's contact record, users can take a closer look at what an Opportunity record looks like. Please note that Test Drive allows read-only access so this will provide a snapshot into how to track a major gift opportunity as a Director of Development or Major Gift Officer.

Dynamics 365 Fundraising and Engagement Development > Contacts > Gabriella Morales >> Morales/Carmack Household

SANDBOX

Update Address Open Org Chart Email a Link Refresh Run Report

Read-only: You don't have access to edit this record.

MH Morales/Carmack Household Account - Fundraising: Household Household Account Type

Summary Details Administration Related

ACCOUNT INFORMATION

Household Number ACC-1008

Account Type Household

Household Name Morales/Carmack Household

Household Salutation ---

Informal Salutation Gabriella Morales

Formal Salutation Mrs. Gabriella Morales

Phone ---

Address 1: Street 1 8126 Veith Avenue

Address 1: Street 2 ---

Address 1: Street 3 ---

Address 1: City Anchorage

Address 1: State Alaska

Address 1: ZIP ---

Address 1: Country/Region USA

Description ---

Household Details

Gabriella Morales	Blaine Carmack
DIRECT CONTRIBUTIONS \$261,846.00	MAJOR DONATION SEP 30, 2020 \$25,000.00
HOUSEHOLD GIVING \$261,946.00	FIRST/LAST GIFT \$4,500.00 on MAY 01, 2020 By Gabriella Morales \$10.00 on OCT 07, 2020 By Gabriella Morales
HOUSEHOLD MEMBERS 2	LAST COMMUNICATION

Update the Address

HOUSEHOLD MEMBERS

Group By: (no grouping)

Last Name	First N...	Household ...	Email	Last Trans...
Morales	Gabriella	Primary H...	gabriella...	10/7/2020
Carmack	Blaine	Member	blaine@b...	1/1/2019

Page 1

PRIMARY MEMBER

Full Name Gabriella Morales

Email gabriella.morales@myemail.com

Home Phone 555-816-1234

Timeline

Search timeline

Get started

Capture and manage all records in your timeline.

Development Active

Navigate back to Gabriella's record and click on the box at the top that indicates her Opportunity.

Dynamics 365 Fundraising and Engagement Development > Contacts > Gabriella Morales

SANDBOX

Read-only: You don't have access to edit this record.

Gabriella Morales
Contact

Donor
Primary Constituent Type

Summary Details Address Details Address Changes Donation Information Administrative Related

CONTACT INFORMATION

Constituent Number	CON-1162
First Name	Gabriella
Last Name	Morales
Salutation	Mrs.
Suffix	---
Informal Salutation	Gabriella Morales
Formal Salutation	Mrs. Gabriella Morales
Company	Fourth Coffee
Household	Morales/Carmack Household
Household Relationship	Primary Household Member
Job Title	VP, Business Development
Birthday	1/25/1983
Deceased?	No
Primary Membership	Annual Supporting Members
Giving Level	Visionary
VIP	False

CONTACT DETAILS

Email	gabriella.morales@myemail.com
Alternate Email	---

Morales - Carmack Family Maternal Health

In Solicitation:	Close
Days in Solicitation:	4
Potential Amount:	\$25,000.00

RECURRING GIFT
NEXT: SEP 16
LAST: AUG 11
\$100.00

LAST GIFT AMOUNT
OCT 7, 2020
\$10.00

LIFETIME GIVING
OCT 7, 2020
\$261,846.00

INFLUENCED
1
\$2,000.00

LAST GIVING CHANNEL
PHONE

MEMBERSHIP
OCT 7, 2021
Annual Supporting Members

Household Details

Gabriella Morales	Blaine Carmack
DIRECT CONTRIBUTIONS \$261,846.00	MAJOR DONATION SEP 30, 2020 \$25,000.00
HOUSEHOLD GIVING \$261,946.00	FIRST/LAST GIFT \$4,500.00 on MAY 01, 2020 By Gabriella Morales \$10.00 on OCT 07, 2020 By Gabriella Morales

SUPPORTING OBJECTIVES

✓ Name	Objective
Maternal Health	Maternal Health
Tanzania	Maternal Health

Timeline

Search timeline

Get started

Capture and manage all records in your timeline.

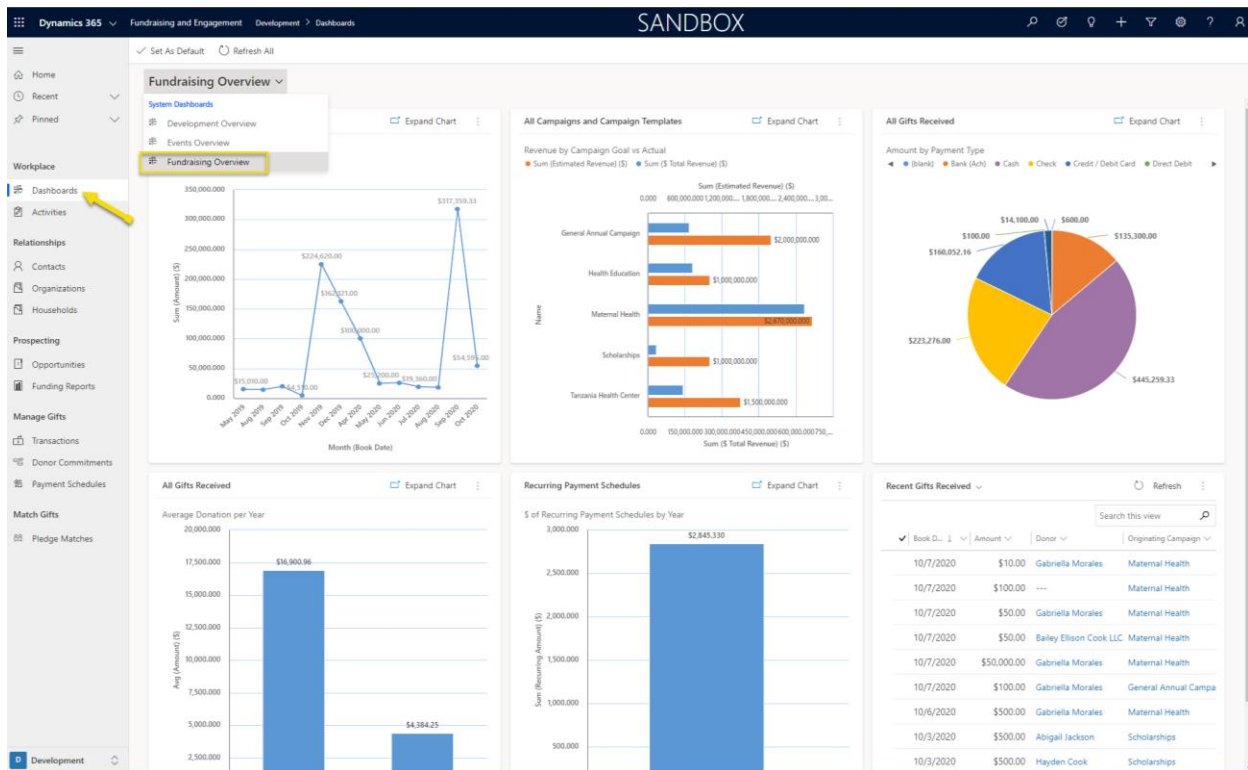
The Opportunity record helps track the major gift opportunity for Gabriella. From the summary page users can see an associated donors (#1), the campaign it is associated with (#2), the primary objective the opportunity supports (#3), the opportunity manager or major gift officer associated with the opportunity (#4), associated event(s) (#5), and finally, the opportunity timeline (#6).

By reviewing the opportunity record, users will see how Fundraising and Engagement tracks key information. The four major sections of the opportunity record include: Preference, Reporting Plan, Stage History, and Designation Plan.

- **Preferences:** Allow users to store the donor's preferences specifically for this opportunity.
- **Reporting Plan:** Store key reports associated with the opportunity.
- **Stage History:** Provides a snapshot view of the activities (emails, phone calls, meetings) and reports conducted in each stage of the opportunity.
- **Designation Plan:** Allocate the opportunity to one or multiple designations. When the opportunity results in a donor commitment and a transaction is received, the amount will be associated to the designation or designations indicated, allowing users to directly connect opportunities to each designation.

When users are done exploring the opportunity, they can take a step back to review other areas of Fundraising and Engagement that are fundamental for a Director of Development. As a Director of Development, it is critical to understand how the organization is performing across all campaigns. The

Fundraising Overview provides that quick look. On the navigation bar, click Dashboards and select Fundraising Overview. Here, fundraising is defined as the Campaigns, Appeals, and Packages that drive direct marketing and annual revenue.

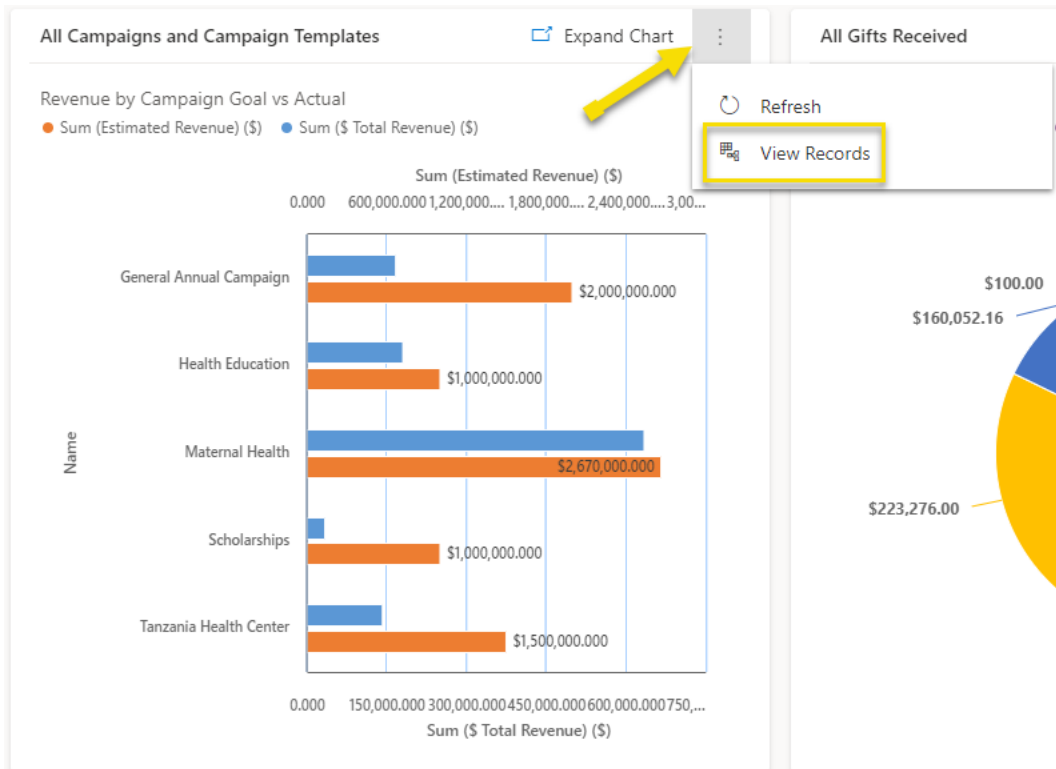


From the Fundraising Overview, the Director of Development can see the organization's performance across all gifts, the campaign performance tracked against the campaign goal, and key year over year numbers like average gift received and revenue received from recurring gifts.

For Marketers

From the Director of Development role, users can transition to a **Marketing** role. A Fundraiser would likely start their day in the Fundraising Overview dashboard.

From the dashboard, users can take a deeper look at fundraising campaigns pertinent to their work. On the Revenue by Campaign Goal v Actual tile, in the upper right-hand corner, click the three dots and select "View Records."



From here users can navigate directly into a Campaign. Select "Maternal Health."

The Campaign record's General tab gives an overview of the campaign details including the designation as well as the estimated revenue, the cost of the campaign, and total revenue booked against the campaign.

Maternal Health Campaign

General | Reporting Hierarchy | Performance | Administration | Related

1 CAMPAIGN

Campaign Code	FY21MH
Name	* Maternal Health
Campaign Type	Other
Campaign Category	RM
Designation	Maternal Health

PLANNING

Proposed Start	1/1/2020
Proposed End	12/31/2020
Actual Start	1/1/2020
Actual End	12/31/2020

2

Estimated Revenue	\$2,670,000.00
Total Cost of Campaign	\$0.000
\$ Total Revenue	\$633,991.16
Currency	* US Dollar

Users can review the following Campaign tabs for more detail:

- **Reporting Hierarchy:** Shows the appeals and packages associated with the campaign. Users can add or remove appeals and packages from this area.
- **Performance:** Shows the donations and events associated with the campaign as well as the transactions booked for both. This provides key information for a Fundraiser trying to understand how their campaign is performing and where the revenue is coming from.

Maternal Health Campaign

General | Reporting Hierarchy | **Performance** | Administration | Related

GIFT PERFORMANCE

\$ Donations	\$583,277.16	\$ Pledges	\$50,500.00
Donations Collected	43	Pledges Collected	2

EVENT PERFORMANCE

\$ Registrations	\$39.00	\$ Sponsorships	\$150.00	\$ Products	\$25.00
Registrations Sold	6	Sponsorships Sold	3	Products Sold	5

For more information on the transactions related to the campaign, users can navigate to **Transactions** under the **Related** tab.

For Event Managers

The final role to explore is the **Event Manager**. Fundraising and Engagement provides Event Managers with the tools to set up events and manage event registrations. Due to the read-only nature of Test Drive, users will only get a high-level tour of what is possible in this area of the solution. Reviewing the Event Setup section will enable users to establish a general understanding of event management in Fundraising and Engagement.

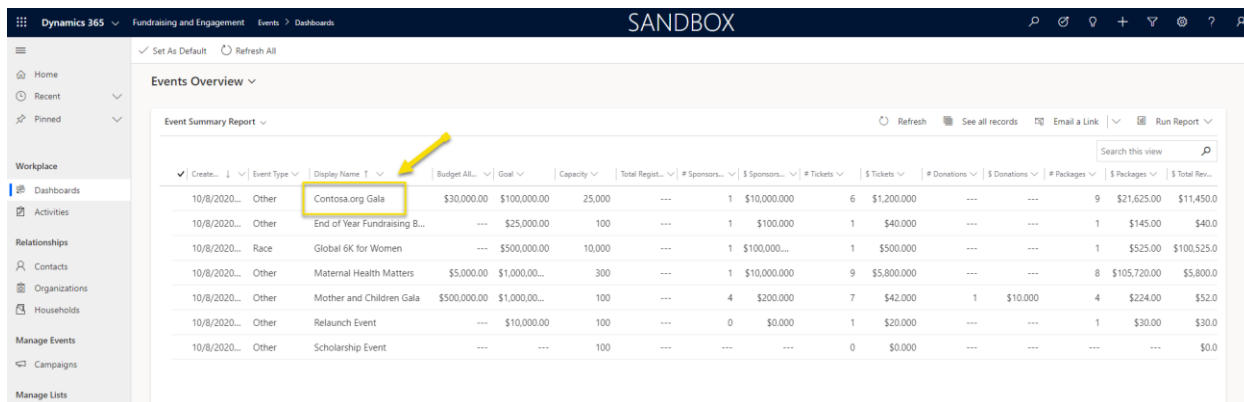
From the bottom of the navigation bar, select Events.

The screenshot displays the Dynamics 365 Fundraising and Engagement interface. The top navigation bar shows the path: Dynamics 365 > Fundraising and Engagement > Events > Campaigns > Maternal Health. The left navigation pane includes sections for Workplace, Relationships, Manage Events, Manage Lists, Setup, Event Transactions, and a 'Change area' dropdown menu. The 'Events' option in the 'Change area' dropdown is highlighted with a yellow box and a yellow arrow. The main content area shows the 'Maternal Health' campaign details under the 'General' tab. The campaign code is FY21MH, and the name is Maternal Health. The campaign type is Other, and the campaign category is RM. The designation is Maternal Health. The estimated revenue is \$2,670,000,000, the total cost of campaign is \$0.000, and the total revenue is \$633,991.16. The currency is US Dollar.

CAMPAIGN	
Campaign Code	FY21MH
Name	Maternal Health
Campaign Type	Other
Campaign Category	RM
Designation	Maternal Health

Estimated Revenue	\$2,670,000,000
Total Cost of Campaign	\$0.000
\$ Total Revenue	\$633,991.16
Currency	US Dollar

This will bring users to the Event Overview, which provides a quick snapshot of event performance across all events. Click into the Contoso.org Gala to look at the Event Setup.

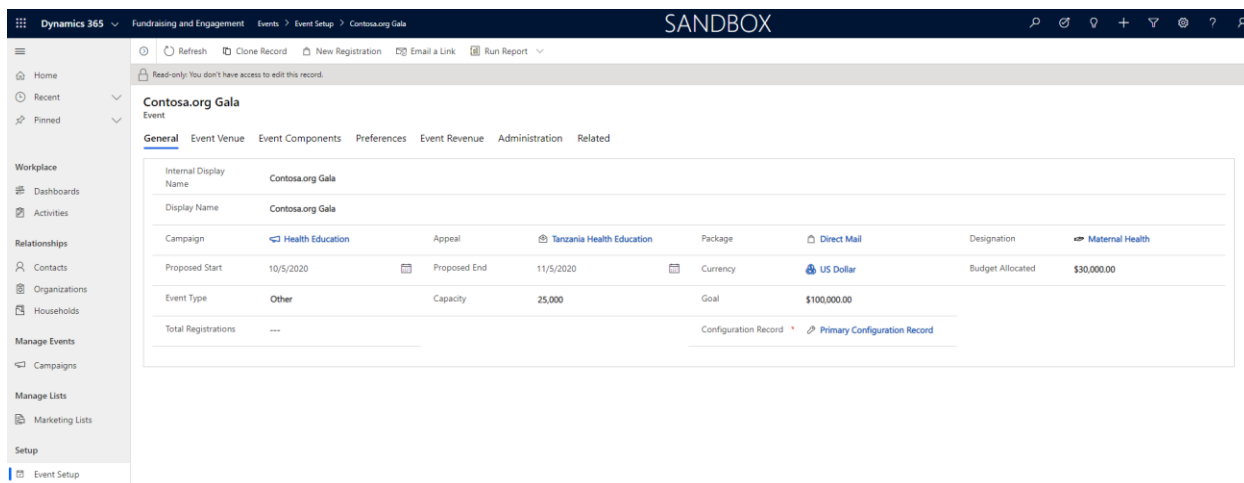


Events Overview

Event Summary Report

✓	Create...	Event Type	Display Name	Budget All...	Goal	Capacity	Total Regist...	# Sponsors...	\$ Sponsors...	# Tickets	\$ Tickets	# Donations	\$ Donations	# Packages	\$ Packages	Total Rev...
✓	10/8/2020...	Other	Contoso.org Gala	\$30,000.00	\$100,000.00	25,000	---	1	\$10,000.00	6	\$1,200.00	---	---	9	\$21,625.00	\$11,450.00
	10/8/2020...	Other	End of Year Fundraising B...	---	\$25,000.00	100	---	1	\$100.00	1	\$40.00	---	---	1	\$145.00	\$40.00
	10/8/2020...	Race	Global 6K for Women	---	\$500,000.00	10,000	---	1	\$100,000.00	1	\$500.00	---	---	1	\$525.00	\$100,525.00
	10/8/2020...	Other	Maternal Health Matters	\$5,000.00	\$1,000.00	300	---	1	\$10,000.00	9	\$5,800.00	---	---	8	\$105,720.00	\$5,800.00
	10/8/2020...	Other	Mother and Children Gala	\$500,000.00	\$1,000.00	100	---	4	\$200.00	7	\$42.00	1	\$10.00	4	\$224.00	\$52.00
	10/8/2020...	Other	Relaunch Event	---	\$10,000.00	100	---	0	\$0.00	1	\$20.00	---	---	1	\$30.00	\$30.00
	10/8/2020...	Other	Scholarship Event	---	---	100	---	---	---	0	\$0.00	---	---	---	---	\$0.00

An Event Manager can provide all the necessary details for the event from this point forward. Events can be tracked to a campaign, appeal, and package as well as a designation.



Contoso.org Gala

Event

General | Event Venue | Event Components | Preferences | Event Revenue | Administration | Related

Internal Display Name	Contoso.org Gala						
Display Name	Contoso.org Gala						
Campaign	Health Education	Appeal	Tanzania Health Education	Package	Direct Mail	Designation	Maternal Health
Proposed Start	10/5/2020	Proposed End	11/5/2020	Currency	US Dollar	Budget Allocated	\$30,000.00
Event Type	Other	Capacity	25,000	Goal	\$100,000.00		
Total Registrations	---						

Configuration Record | Primary Configuration Record

The main sections of Event Setup include:

- **Event Venue:** Where users can indicate the Event Venue and address.
- **Event Components:** Allows users to set up details of the event registration including disclaimers, sponsors, tickets, products, and donations.
- **Preferences:** Where users indicate the preferences registrants should indicate on their event registration including dietary requirements, t-shirt sizes, and seating preferences.
- **Event Revenue:** Provides an overview of the event performance including number of sponsorships, tickets, products, donations, and packages as well as the revenue associated with each. It also provides the total revenue.

This guide highlights several major flows of Fundraising and Engagement. There is much more to explore, including transaction management, recurring gift management, business intelligence and calculations driven by Azure, and constituent and donor insights generation. Users should take time to look through each functional area of the Fundraising and Engagement solution. In the table below, there are a number of "hero" records listed that have been created to showcase the full functionality of the Fundraising and

Engagement solution. These records are a great starting point for a Test Drive review. For a detailed breakdown of each section, users can review the [Fundraising and Engagement User Guide](#) on GitHub.

Record Type	Hero Record
Contacts	Hayden Cook & Gabriella Morales
Household	Morales-Carmack Household & Cook Household
Account	Bailey Ellison Cook LLC
Opportunity	Morales – Carmack Family Maternal Health
Campaign	Maternal Health
Designation	Maternal Health
Appeal	November Appeal
Package	Direct Mail v1
Event	Contoso.org Gala