

Fundraising and Engagement

Frequently Asked Questions

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# Q: What is Fundraising and Engagement?

A:Fundraising and Engagement is a purpose-built donor management and fundraising solution built on the Common Data Model (CDM) for Nonprofits. This solution runs on Dynamics 365 Sales and is backed by extensive Microsoft platform capabilities, leveraging the best-in-class cloud infrastructure through Azure, PowerBI business intelligence and reporting, and other nonprofit-specific applications so it can grow with your organization. Available today, it will become part of the broader [Microsoft Cloud for Nonprofit](https://www.microsoft.com/en-us/nonprofits/microsoft-cloud-for-nonprofit) when that is generally available in the second half of 2021.

# Q: What does Fundraising and Engagement do?

A: Designed to modernize donor and constituent engagement to increase mission impact, Fundraising and Engagement empowers nonprofits to:

* Attract, retain, and grow donors through personalized engagement.
* Drive fundraising efficiency by automating key business processes like donation, pipeline, opportunity, campaign, and event management.
* Get an accurate picture of fundraising and financial outcomes in real-time.
* Leverage a purpose-built platform that aligns fundraising, program delivery, finance, and operations with actionable insights and impact.

# Q: What functionality is included in Fundraising and Engagement?

A: The solution contains the following modules:

* **Development**: Manage Relationships (Contacts, Organizations, Households) and Opportunities.
* **Fundraising:** Manage Campaigns, Appeals, Packages and Marketing Lists.
* **Gifts:** Access all of the gift management options such as Transactions, Donor Commitments, Payment Schedules, Gift Batches, Bank Runs, Receipts and Receipt Stacks. This module also contains Membership, Payment Methods, Refunds, Designation and the Donation Import Tool.
* **Events:** Manage and setup events, process offline registrations and event transactions.
* **Configuration:** set-up and manage giving levels, designations and payment processing.

# Q: What’s new in the May 2021 update?

A: In the May 2021 release of Fundraising and Engagement, the following features have been added:

* Constituent and Prospect Research powered by LinkedIn**.** The integration of LinkedIn Sales Navigator into the contact, organization, and opportunity records of Fundraising and Engagement enables users to quickly and easily initiate constituent and prospect research, tailor cultivation and solicitation approaches, and leverage their personal and organizational networks for more authentic touchpoints. Users need to have either a [LinkedIn Sales Navigator Team or Enterprise license](https://nam06.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbusiness.linkedin.com%2Fsales-solutions%2Fcompare-plans&data=04%7C01%7Cv-tferguson%40microsoft.com%7Cb155f770e2ff464207f708d8f2e62497%7C72f988bf86f141af91ab2d7cd011db47%7C1%7C0%7C637526417585496632%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=G0fOfqR%2FtTSHxsCyDoZ%2BFyo9GBuM2P2q4vZOFOthmkg%3D&reserved=0) in order to leverage this functionality within Fundraising and Engagement.
* Rapid Donation Management and Payment Processing. Donation, payment schedule, and pledge forms , as well as workflows, have been redesigned to enhance efficiency, accuracy, and role-based security. These changes will increase the gift entry speed by an estimated 30% and enable easier customization.

# Q: What is the difference between the Dynamics 365 Nonprofit Accelerator and what Fundraising and Engagement offers?

A: The Dynamics 365 Nonprofit Accelerator provides *building block* applicationsto accelerate partner and nonprofit development of purpose-built nonprofit solutions. Nonprofit organizations and partners can create, extend, and customize these Power Platform solutions to their specific requirements. The accelerator provides software engineers with a head start in developing innovative and purpose-built applications that meet the needs of modern nonprofits. Applications cover critical use cases of, constituent management, case management, program design and project management, program delivery, nonprofit operations, award management, assessment management, and frontline humanitarian logistics.

Built on the CDM for Nonprofits, Dynamics 365, and Azure, Fundraising and Engagement is a Microsoft-supported solution that delivers constituent, prospect, opportunity, pipeline, moves, event, campaign, and donation and payment management to fundraisers, prospect researchers, marketers, and development staff.

Visit [Microsoft Docs](https://docs.microsoft.com/en-us/common-data-model/nfp-accelerator) to learn more about the Dynamics 365 Nonprofit Accelerator and the CDM for Nonprofits.

# Q: Does Fundraising and Engagement manage households?

A: Yes. Fundraising and Engagement does include household management. The Contact record acts as a hub which holds the details and preferences which roll up into a related Household snapshot. The Household Account record represents a grouping of individual contacts used to summarize overall giving and communication activity within a household. A primary household member is designated, and this designation is easily transferred should the household dissolve or other life events result in the change of household member attributes.

# Q: Can Fundraising and Engagement integrate with my current finance system?

A: Microsoft recognizes that fundraising CRMs are often used as a sub-ledger to organizations’ core finance systems. Fundraising and Engagement is based on fund-accounting principles and has its own general ledger. This allows organizations to export data from the solution and import it into its financial system of record.

Customers utilizing Microsoft Dynamics 365 Finance & Operations have native integration through Dual Write. Customers of Microsoft Dynamics 365 Business Central can use Power Automate to integrate with Fundraising and Engagement. Microsoft has also worked with partners to adopt the CDM for Nonprofits to make data interoperability across platforms easier. ISVs have adopted a similar approach for their software. Please check with them to determine interoperability with the CDM for Nonprofits.

# Q: Is Fundraising and Engagement PCI compliant?

A: Fundraising and Engagement integrates with Stripe, Moneris and iATS payment gateways – they provide PCI DSS v3.2.1 compliance which enables the latest fraud prevention tools such as 3D secure. We never persistently store full credit card numbers or CVV/CVC. Only the tokenized value, returned from the processor is stored, allowing organizations to charge, refund and manage payment methods directly within Fundraising and Engagement.

# Q: What can and cannot be configured in Fundraising and Engagement?

A: At the core of Fundraising and Engagement is the Configuration Record which allows organizations to tailor the system to suit their needs. Moreover, it shares the same configuration tools as Dynamics 365 tools that allow organizations to configure labels, fields, and values at will. Partners will walk organizations through configuration options and system administrators will be able to revise these at any time.

As Fundraising and Engagement has been built upon the CDM for Nonprofits, it has inherited the entities, attributes, and core nonprofit processes related to donor management and fundraising operations. These entities are not configurable, but can be extended by developers and ISV build partners

# Q: What are my marketing automation options?

A: Dynamics 365 Marketing is a seamless compliment to Fundraising and Engagement, as both applications are built on the foundation of Dataverse, Microsoft’s Common Data Service. Dynamics 365 Marketing provides nonprofit organizations with powerful capabilities to design, plan, and execute omni-channel marketing plans, digital and in-person events, and deliver tailored constituent journey orchestration. Power Automate provides Connectors to MailChimp, Mandrill, and Marketo. To learn more about how to leverage marketing Connectors using Power Automate visit <https://flow.microsoft.com/en-us/>.

If organizations wish to maintain their existing marketing automation tool, they can elect to use the Marketing List functionality within Fundraising and Engagement to export and feed lists into their organization’s marketing system. For more information, see the [Fundraising and Engagement User Guide](https://aka.ms/FEUSERGUIDE).

# Q: How do I migrate and import data into Fundraising and Engagement?

A: Implementation partners will work with organizations on the best method for importing data into Fundraising and Engagement. Data migration will involve mapping and aligning the organization’s existing data structure with the CDM for Nonprofits as well as transferring recurring payment schedules and applying the organization’s current General Ledger structure to be used when processing future gifts.

For importing third-party gift sources, Fundraising and Engagement has a Donation Import Tool, which imports gifts into the solution and appends it to an existing contact or organization or creates a new contact or organization record.

# Q: Where and how is my data secured?

A: A Dynamics 365 instance is hosted in Microsoft’s data center in a location of the customer’s choosing and provides undisputed security of data with a guaranteed 99.9% uptime, financially backed service level agreement. This includes all documents stored in SharePoint and all documents stored against the contact record. Microsoft takes back-ups every 24 hours, so they can be manually executed and restored on an ad hoc basis.

# Q: How does Fundraising and Engagement manage security/user access?

A: Fundraising and Engagement utilizes the Dynamics 365 framework for security roles, which is a matrix of privileges and access levels for the various entities. The business unit dictates what a user can see/access; the security role dictates what they can do with it once they can see it.

The security model in Dynamics 365 allows organization to implement a security strategy that replicates the most complex of hierarchies and customizations. Administrators can separate the access to data versus the functionality.

With respect to protecting access to sensitive data, Dynamics 365 user security allows you to define read, update, and delete rights down to the field level. You can set the data privileges to Read, Write, Append, Assign, Delete, Share, associate to, and associate from all from the security role setup. See the [Fundraising and Engagement User Guide](https://aka.ms/FEUSERGUIDE) for more information.

It’s also important to note that processes run in the context of a user. This means things like de-duplication rules and donor searches are reliant on the user or process being granted the right security privileges to see the contacts and accounts in the first place.

# Q: Can Fundraising and Engagement support a charter/agency model?

A: Yes. As Fundraising and Engagement is based on Dynamics 365, there are two levels of providing access to users - at the Business Unit level and via Security Roles. The Business Unit facilitates what a user can see/access and the security permissions dictate what they can do with it if they can see it.

Dynamics 365 utilizes a User -> Team -> Business Unit (department) hierarchy. Business units have a parent-child relationship allowing organizations to replicate the actual hierarchy of an organization. Just as in real-life scenarios, users can be members of multiple teams, however must belong to a single business unit.

# Q: What are the licensing requirements for Fundraising and Engagement?

A: Fundraising and Engagement works in conjunction with a Dynamics 365 Sales Enterprise Full User license. There is no additional fee for the Fundraising and Engagement solution itself for eligible nonprofits. In addition, Microsoft Tech for Social Impact offers eligible nonprofits five free licenses of D365 Sales Enterprise to get started. See below for more information. To learn more, visit [Dynamics 365 Sales](https://dynamics.microsoft.com/en-us/sales/overview/) or [Microsoft’s nonprofit pricing offers](https://nonprofit.microsoft.com/en-us/getting-started).

# Q: How does Fundraising and Engagement use Azure and what are the related costs?

A: Fundraising and Engagement requires an Azure tenant for payment processing, data calculations, and data management and transformation functions. On average these functions consume $300/month which can be covered by the $3,500 annual Grant available to all nonprofit organizations on the Azure Portal. For more information about the Azure Grant, go to [https://www.microsoft.com/nonprofits](https://www.microsoft.com/en-us/nonprofits).

Please use our [Azure pricing calculator](https://azure.microsoft.com/en-us/pricing/calculator/) to configure and estimate the costs for Azure.

# Q: Can I use a Team Member license for Fundraising and Engagement?

A: The Dynamics 365 Team Member license is restricted to very limited use cases explained in the [Dynamics 365 Licensing Guide](https://dynamics.microsoft.com/en-us/pricing/). Fundraising and Engagement is designed for nonprofit employees who will work with the system every day, so a full license is recommended.

# Q: Are there free seats available to get started with Dynamics 365 Sales Enterprise and Fundraising and Engagement?

A: Eligible nonprofits can get Dynamics 365 Sales Enterprise free for up to 5 seats and discounted pricing of $23.80 per user/month for additional users, which is 75% off the commercial price. This grant must be accessed through a Microsoft Dynamics 365 Partner or your Microsoft account team. If you do not have a partner,  [complete this form to connect with a Dynamics 365 partner](https://nonprofits.tsi.microsoft.com/find-a-Microsoft-Dynamics-365-Partner) who can help you take advantage of this offer.

# Q: Fundraising and Engagement works with LinkedIn Sales Navigator. Do I need to buy that separately to take advantage of the integration?

A: Yes. You need to have either a LinkedIn Sales Navigator Team or Enterprise license to leverage it within Fundraising and Engagement.

# Q: Are there nonprofit discounts for LinkedIn Sales Navigator licenses?

A: Yes. You can learn more by visiting the [LinkedIn for Nonprofits website](https://nonprofit.linkedin.com/fundraise). To understand eligibility requirements and discounts, please visit this [FAQ page](https://nonprofit.linkedin.com/faq) or you can contact the [LinkedIn team](https://nonprofit.linkedin.com/faq/contact-us) for more details.

# Q: How much does Fundraising and Engagement cost to implement?

A: Just as with any Dynamics 365 implementation, there are key factors at play when determining the implementation costs, including customer requirements above and beyond base configuration, potential customizations, and data migration. A fulsome discovery should be conducted with a partner to accurately provide an estimate to implement Fundraising and Engagement.

Fundraising and Engagement requires a full Dynamics 365 Sales Enterprise license. Fundraising and Engagement is free of charge for nonprofits that have passed [eligibility requirements](https://www.microsoft.com/en-us/nonprofits/eligibility). Pricing is subject to change.

# Q: How long does it take to implement Fundraising and Engagement?

A: Designed with an accelerated implementation in mind, a typical engagement can last between 16 to 20 weeks, depending on the complexity of the organization’s requirements and data migration; any customizations will increase the timeline. A partner should be consulted for the specific details and timing.

# Q: What integrations are available with Fundraising and Engagement?

A: There are three native integration services available in Dynamics 365, including:

## Power Automate

This tool allows Business Applications users to implement no-code data transformation and integration to all Microsoft “Platform components” which are on Microsoft Dataverse. Dataverse is the underlying platform which allows all applications to talk seamlessly with one another in the Microsoft ecosystem. Power Automate controls how these applications should interact with one another. Power Automate also allows administrators to use connectors for applications that sit outside of Dataverse. These connectors can be found at <https://docs.microsoft.com/en-us/connectors/connector-reference/>

## Dynamics 365 API

This is a fully documented API that allows developers to create direct integrations to the Dynamics 365 platform. The API allows developers to manage all CRUD operations, and observes the business logic implemented in the system, meaning necessary workflows or logic are applied regardless of whether the records came from an integration via the API or by a user entering in data directly. For a full list of customization options included via the API please visit <https://docs.microsoft.com/en-us/dynamics365/>

## LinkedIn Sales Navigator

LinkedIn Sales Navigator enables users to leverage the largest professional network in the world for instant access to personalized insights, updates, and communication. To utilize this functionality, you need to have either a [LinkedIn Sales Navigator Team or Enterprise license](https://nam06.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbusiness.linkedin.com%2Fsales-solutions%2Fcompare-plans&data=04%7C01%7Cv-tferguson%40microsoft.com%7Cb155f770e2ff464207f708d8f2e62497%7C72f988bf86f141af91ab2d7cd011db47%7C1%7C0%7C637526417585496632%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=G0fOfqR%2FtTSHxsCyDoZ%2BFyo9GBuM2P2q4vZOFOthmkg%3D&reserved=0). For more information about the integration, please refer to [Dynamics 365 Sales documentation](https://docs.microsoft.com/en-us/dynamics365/linkedin/integrate-sales-navigator).

# Q: Where is there more information about Fundraising and Engagement?

A: The Fundraising and Engagement User Guide and other documentation is posted on [GitHub](https://github.com/microsoft/fundraising-and-engagement).

# Q: What are the Dynamics 365 Nonprofit Accelerator and Common Data Model for Nonprofits?

A: The Dynamics 365 Nonprofit Accelerator and Common Data Model (CDM) for Nonprofits help organizations eliminate data silos, enabling powerful insights into their data. Microsoft is dedicated to working with nonprofits and partners to develop solutions based on entities and attributes that nonprofits commonly use for constituent management, fundraising, awards, program delivery, and impact tracking.

These entities include, donor commitments, designations, transactions, awards, disbursements, delivery frameworks, results, indicators, benefit recipients, and more. The nonprofit accelerator provides a uniform platform for customers who wish to connect, embed, or extend the Dynamics 365 platform and Microsoft Power Platform and benefit from integration with CDM for Nonprofits.

You can find information about the Dynamics 365 Nonprofit Accelerator and CDM for Nonprofits in [Microsoft Docs](https://docs.microsoft.com/en-us/common-data-model/nfp-accelerator) as well as on [GitHub](https://github.com/Microsoft/Industry-Accelerator-Nonprofit#:~:text=Get%20to%20know%20about%20other%20Industry%20Accelerators%20,Education%20us%20...%20%202%20more%20rows%20) and [AppSource](https://appsource.microsoft.com/en-us/product/dynamics-365/msnfp.msftnonprofitcommondatamodel).

# Q: How can I learn more about Fundraising and Engagement for my organization?

A: If you have a Microsoft Account Executive, you can reach out to them directly for more information. You can also connect with your Microsoft partner.

# Q: I don’t have a Microsoft partner. How do I find a partner to work with?

A: Microsoft has an activated ecosystem of partners that create and implement solutions for the nonprofit sector. These partners are committed to aligning behind data standards, interoperability, and transparency in their solutions through the Microsoft Dynamics 365 nonprofit accelerator. To find a partner who can discuss Fundraising and Engagement with you, please visit the [Fundraising and Engagement homepage](https://www.microsoft.com/en-us/nonprofits/engage-donors-constituents).

**Q: How do I (a nonprofit customer) get technical support for Fundraising and Engagement?**

A:While your Microsoft Support contract covers the core Dynamics 365 service, Fundraising and Engagement-specific support questions should be directed to your Microsoft Partner.

# Q: How do I report issues with Fundraising and Engagement?

A:

1. If you are a nonprofit organization seeking support for an implemented Fundraising and Engagement solution, you will work with your implementing partner to receive timely and expert support.
2. If you are a partner or nonprofit organization seeking general Dynamics 365 support, please [submit a case](https://mbs.microsoft.com/customersource/northamerica/CRM/support/support-lifecycle/CRMSupport).
3. Microsoft’s Tech for Social Impact Engineering team provides support to our partner developers to help them extend and build from the open source packages published here on GitHub. If you are a partner seeking support from Microsoft, please [submit a case](https://forms.office.com/Pages/ResponsePage.aspx?id=v4j5cvGGr0GRqy180BHbR9O0k5_UUiBCoZBVVnq-IHZUNzI1SDgxRjY2VU5GT0EzSkEzMzU1Q1I3WC4u). We will be in touch within 24 hours of receiving your inquiry.

# Q: How do I engage with Microsoft if I am a Partner interested in building on Fundraising and Engagement?

A: To engage with Microsoft, contact us at [tsipsupp@microsoft.com](mailto:tsipsupp@microsoft.com?subject=I'm%20interested%20in%20building%20on%20Fundraising%20and%20Engagement).