Customer Experience Workflow

**Solution 3: Write a Gift Acknowledgement**

**June 7, 2023**

This document catalogs the Microsoft Tech for Social Impact AI Solutions Project, delivered in collaboration with threshold.world. It includes detailed description of expected customer experience for accessing, downloading, installing, deploying, and utilizing the AI Solution.

Contents

[Installation and Configuration 3](#_Toc135762354)

[Prerequisites 3](#_Toc135762355)

[Set up an OpenAI API Key 3](#_Toc135762356)

[Manual Solution Installation 5](#_Toc135762357)

[Utilizing the AI Solution 12](#_Toc135762358)

[Grant Requests Summary​ 12](#_Toc135762359)

# Installation and Configuration

## Prerequisites

It's important to review the following prerequisites before you deploy or install the solution.

* Dynamics 365 Sales Enterprise must be installed
* Microsoft Cloud for Nonprofit – Fundraising and Engagement. (see [Deploy or upgrade Fundraising and Engagement](https://learn.microsoft.com/en-us/dynamics365/industry/nonprofit/fundraising-engagement-deploy-installer))
* Common Data Model for Nonprofits Sample Apps (solutions can be found [here](https://github.com/microsoft/Industry-Accelerator-Nonprofit/releases))
* You must be a Microsoft Power Platform admin, Dynamics 365 admin, or a tenant admin to deploy solutions

## Set up an OpenAI API Key

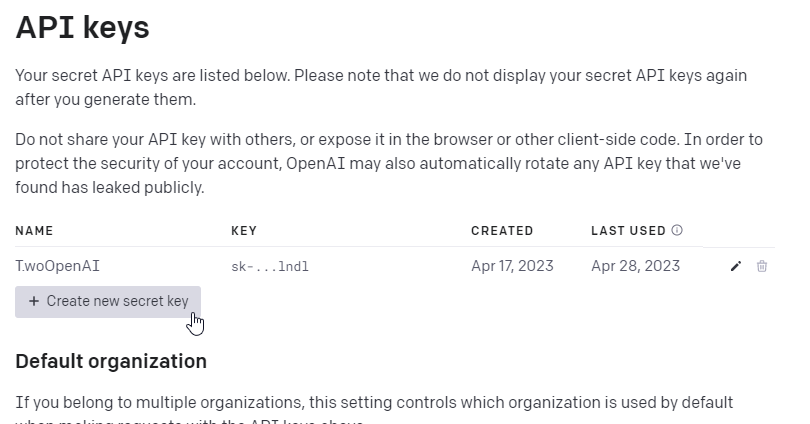
Before getting an API key, you need to go to [OpenAI’s official platform website](https://platform.openai.com/). If you haven’t already, create an account following the simple steps on the website. Once you have created an account or have logged in with an existing account, you’ll see your name and your profile icon at the top-right corner of OpenAI’s platform homepage.

To get an API key,

1. Log in to your OpenAI account.
2. Click on your name in the upper right corner and select **View API keys** from the drop-down menu**.**

Graphical user interface, application, PowerPoint

Description automatically generated

1. To get a new secret key, click the **Create new secret key** button near the center of the page. 
2. On the create new secret key dialog, enter a name for your API key and click **Create secret key**

Graphical user interface, text, application

Description automatically generated

1. A new secret key will be generated. Make sure to save the secret key somewhere safe as soon as possible. Once the dialog closes, you won’t be able to view the secret key again.

Graphical user interface, text, application, email

Description automatically generated

## Manual Solution Installation

1. Before installing the solution, make sure you have the solution file in your machine. (Filename: **TSI\_OpenAI\_GiftAcknowledgement\_1\_0\_0\_0.zip**)
2. Go to the [Maker Portal](https://make.powerapps.com/)
3. On the top right, select the environment where you want to install the solution.

Graphical user interface, application

Description automatically generated

1. On the left navigation pane, click **Solutions**

Graphical user interface, text, application

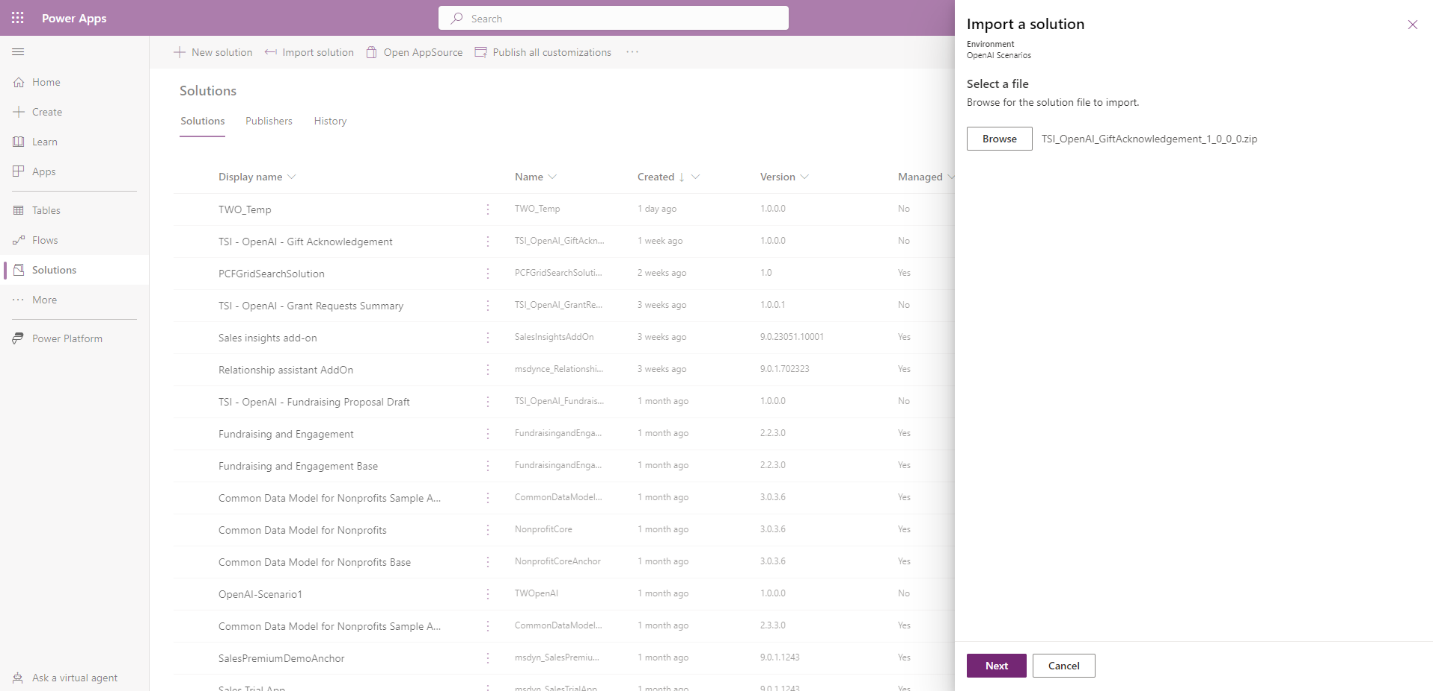
Description automatically generated

1. Click **Import solution**

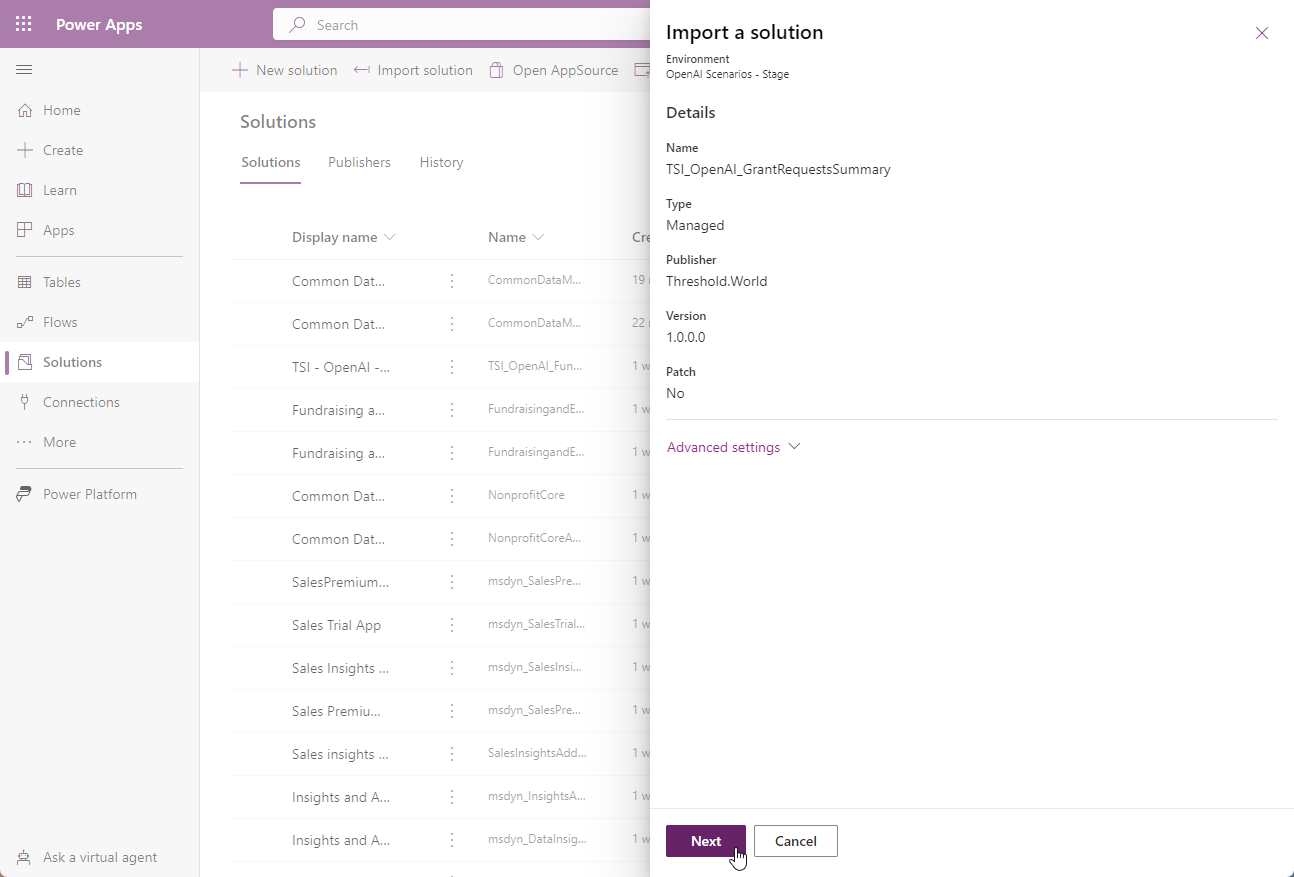
Graphical user interface

Description automatically generated with medium confidence

1. Browse to the location of the solution file downloaded at step 1 and click **Next**



1. On the confirmation window click **Next**



1. The import process will ask you to reestablish a connection. A connection is needed for the Power Automate Flow that is part of the solution. This connection provides access to the org-based database on Microsoft Dataverse in current environment. If a connection already exists, you can select it from the dropdown and you can jump to step 12. In case there are no connections, Click the dropdown next to the connection reference and click **New Connection.**

Graphical user interface, application

Description automatically generated

1. A new window will open to create the connection. On the dialog, click **Create**

Graphical user interface, application, Teams

Description automatically generated

1. Pick an account or log in with an account that has access to the current Dataverse Environment

Graphical user interface, application

Description automatically generated

1. After creating the connection, go back to the previous window and click **Refresh** on the dialog shown. That will refresh the connections dropdown.

Graphical user interface, text, application

Description automatically generated

1. Select the newly created connection from the dropdown next to the connection reference and click **Next.**

Graphical user interface, text, application

Description automatically generated

1. Wait until the import process completes.

A screenshot of a computer

Description automatically generated

# Utilizing the AI Solution

## Write Gift Acknowledgement​

Thanking donors is the cornerstone of good donor stewardship. With this Open AI solution in the Microsoft Cloud for Nonprofit, donors can generate, customize, and send targeted gift acknowledgements to donors to thank them for their contributions to your mission.

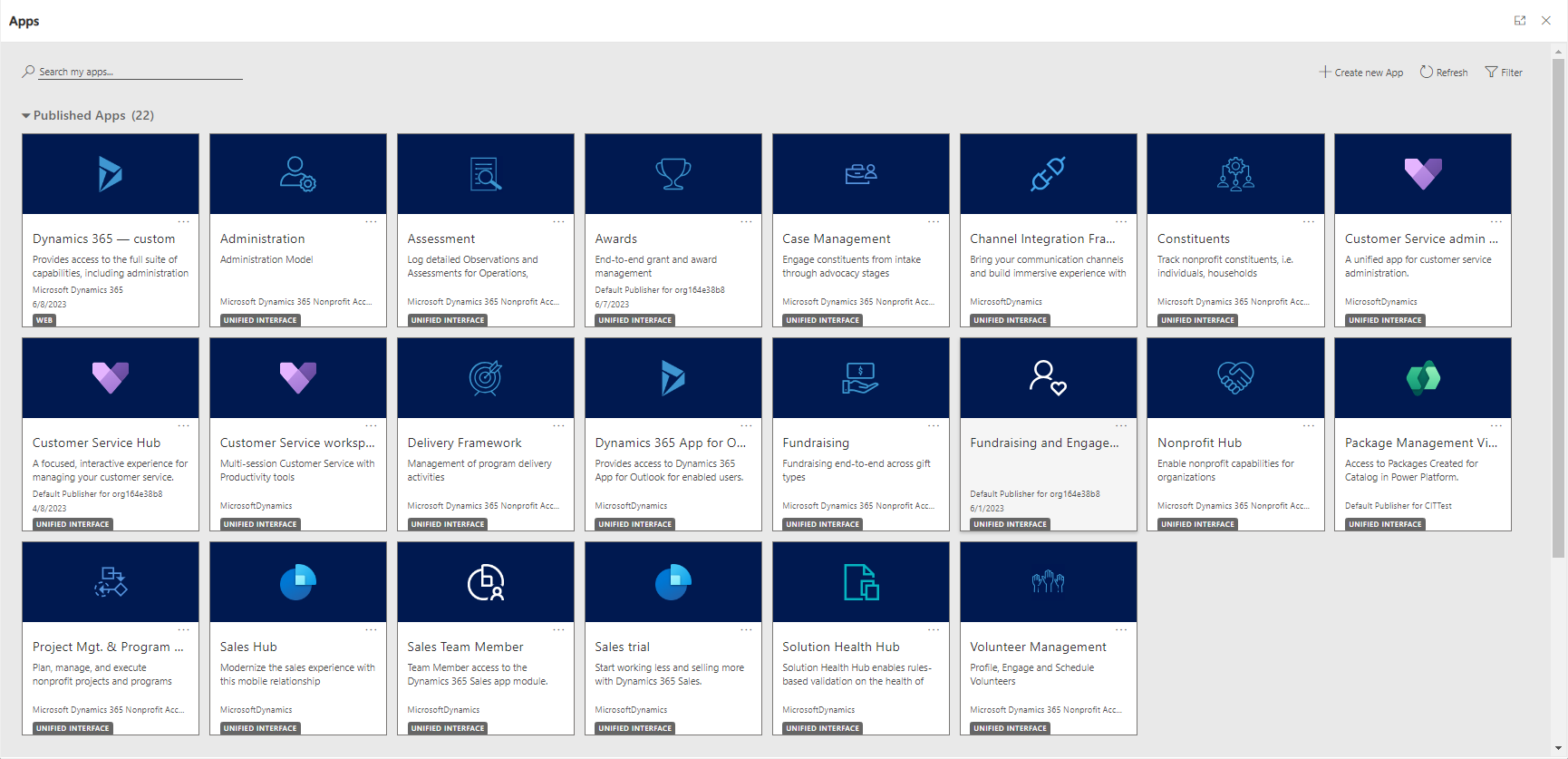
With the click of a button, fundraisers can generate a draft acknowledgement email or letter that can be edited and sent to donors. The draft acknowledgement is generated by Open AI based on the context of a transaction, a donor’s profile, taxable amounts, and designated funds in the Microsoft Cloud for Nonprofit.

The following guidelines will show how to use the predeveloped solution:

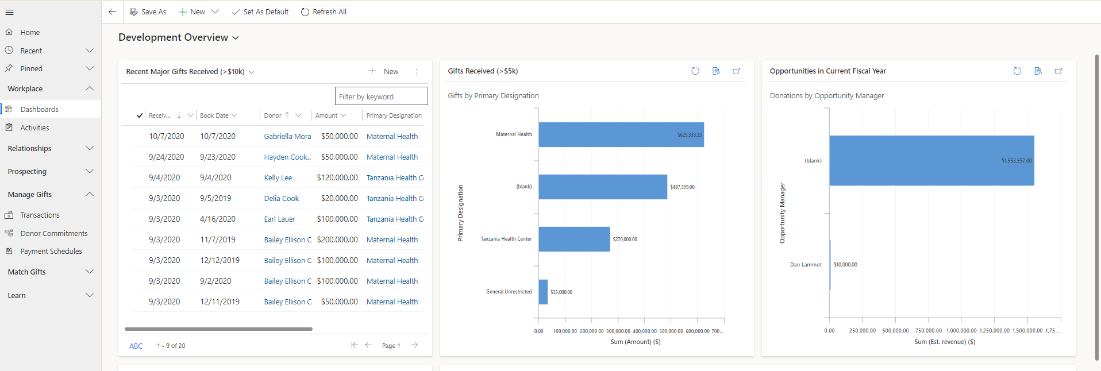
1. Go to your organization’s Dynamics 365 CRM portal (e.g.

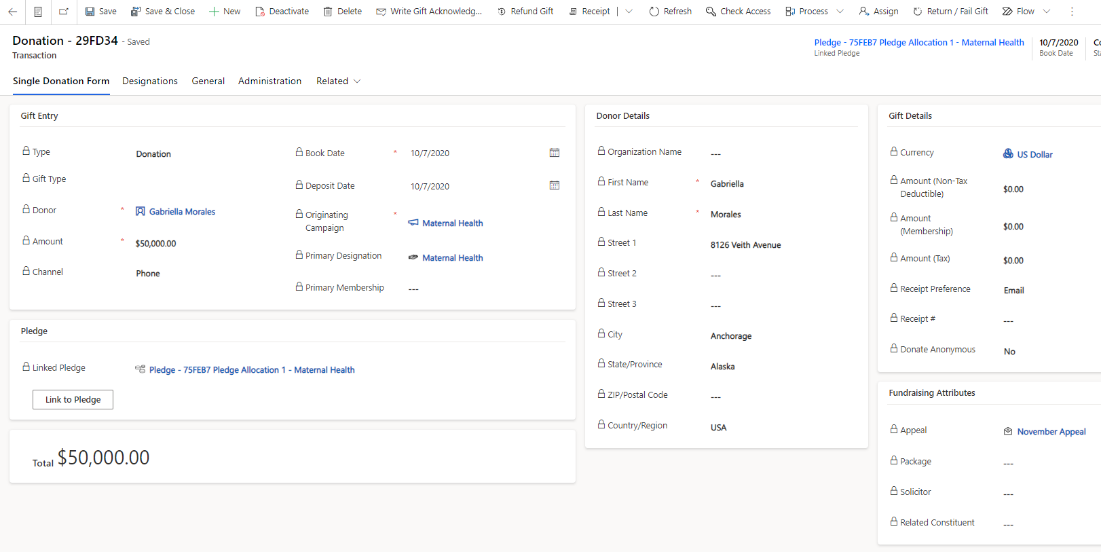
<https://organizationid.crm.dynamics.com>).

1. From the list of apps, select the **Fundraising & Engagement** model-driven app.



1. From the navigation pane, select **Transactions**, or from the **Home** page, select any **Major Gift**.





1. From the detail view for any Gift, select **Write Gift Acknowledgement** to open the Gift Acknowledgement generator. A side panel dialog opens, which shows 3 sections:
   1. Information about the selected Gift.
   2. Additional Guidance and Generation of Gift Acknowledgement – this section allows to add more guidance or context before sending the data to OpenAI.
   3. Generated Gift Acknowledgement – this section shows the AI generated gift acknowledgement. Also allows the user to edit the contents of that acknowledgement before creating the email activity.

A screenshot of a computer

Description automatically generated

1. Once the additional context is added (this is optional), click **Write Gift Acknowledgement.** When the process completes, the drafted Gift Acknowledgement will get displayed in the section below (Generated Gift Acknowledgement) where it can be reviewed and edited before creating the email activity.

A screenshot of a computer

Description automatically generated with medium confidence

1. After reviewing and or modifying the response with the use of the editor simply click **Save Gift Acknowledgement.**
2. After successfully creating the email activity, a notification banner will be shown on top and a link will be provided to navigate to the newly created email activity.

A screenshot of a computer

Description automatically generated with medium confidence