

Fundraising and Engagement

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

Frequently Asked Questions

**Published**: October 9, 2020

**Release Version**: v1.0

# Q: What is Fundraising and Engagement?

A:Fundraising and Engagement for Dynamics 365 Sales, a Microsoft solution built with MISSION CRM, is a purpose-built donor management and fundraising solution built on the Common Data Model (CDM) for Nonprofits. This solution runs on Dynamics 365 and is backed by the full Microsoft stack, leveraging the best-in-class cloud infrastructure through Azure, business intelligence and reporting capabilities, and other nonprofit-specific applications so it can grow with your organization.

# 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 process.
* 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: Fundraising and Engagement, for Dynamics 365 Sales, a Microsoft solution built with MISSION CRM—who is MISSION CRM?

A: [MISSION CRM](https://missioncrm.ca/) is an independent partner organization that develops solutions for the nonprofit sector.

# Q: Did Microsoft acquire MISSION CRM?

A: No. Microsoft did acquire some IP from MISSION CRM, and their organization heavily contributed to the building of Fundraising and Engagement. MISSION CRM continues to be a Microsoft partner.

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

A: The Microsoft Dynamics 365 Nonprofit Accelerator provides building blocks to accelerate partner and nonprofit development of purpose-built nonprofit solutions. Customers and partners can create, extend and customize these 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.

Built on the Common Data Model for Nonprofits, Fundraising and Engagement is a purpose-built solution, backed by the full Microsoft stack, leveraging best-in-class cloud infrastructure through Azure, business intelligence and reporting capabilities, and nonprofit-specific functionality for donor management and fundraising operations.

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 Common Data Model (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.

# 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 for their integrations. Microsoft has also worked with partners to adopt the Common Data Model (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 nonprofit CDM.

# 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. This includes PCI compliant use of credit card processing tools from within Fundraising and Engagement. No credit card payment information is either stored, logged or directly accessed by Fundraising and Engagement – 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 which allows organizations to change 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 Common Data Model (CDM) for Nonprofits, it has inherited the entities, attributes and core nonprofit processes related to donor management and fundraising operations. These are not configurable.

# Q: What are my marketing automation options?

A: Dynamics 365 Marketing works seamlessly with Fundraising and Engagement. Additional options, such as ClickDimensions and Touchdown, are both managed solutions which are deployed to a Dynamics 365 instance. Lastly, Power Automate provides Connectors to MailChimp, Mandrill, and Marketo. To learn more about how to use 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 the 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 Nonprofit Common Data Model 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, associate from all from the security role setup. See the [Fundraising and Engagement User Guide](https://microsoft.sharepoint.com/teams/MissionCRM/Shared%20Documents/General/MSFT%20documentation/FAQ/Aka.ms/FEUSERGUIDE) for more information.

It’s also important to note that processes run in the context of a user. This means having things such as de-duplication rules and donor searches rely 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. To learn more, visit the [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; on average this equates to $300/month which can be covered by the $3,500 annual Grant available to all nonprofit organizations on the Azure Portal, which can be applied against its usage of Azure services.

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: 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 two 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 the Common Data Service (CDS). The Common Data Service 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 the Common Data Service. These connectors can be found here: <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/>

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

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

# Q: What is the Dynamics 365 nonprofit accelerator and Common Data Model for Nonprofits?

A: The Dynamics 365 nonprofit accelerator and Common Data Model 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 Common Data Model for Nonprofits.

You can find information about the Dynamics 365 nonprofit accelerator and Common Data Model 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 at the end of October.

**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. Refer to our list of [launch partners](https://aka.ms/FundraisingandEngagment) (including SI and ISV partners).
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 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).