

Evo 365

Microsoft Dynamics 365 **accelerators** to help organisations quickly get up and running with pre-built features that meet their unique requirements.



EVO 365
FUNDRAISING

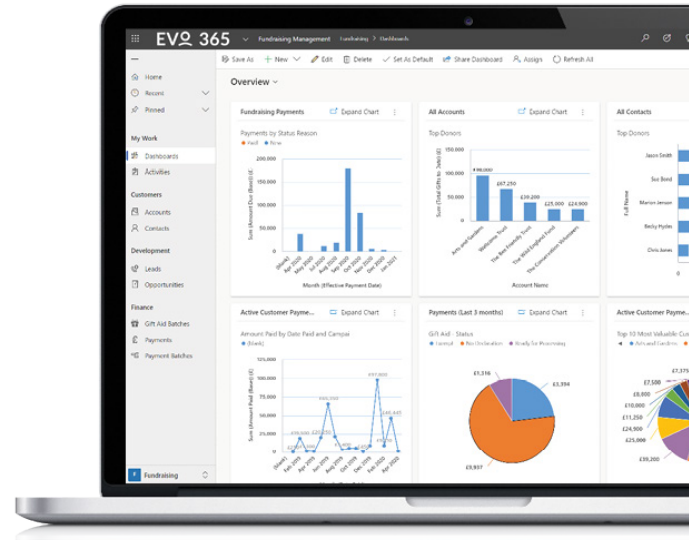
EVO 365
MEMBERSHIP

EVO 365
NOT FOR PROFIT

Industry Accelerators for Dynamics 365

As Microsoft Dynamics 365 partners, we have helped many organisations to implement and adopt Dynamics 365 to centralise and manage their data. With powerful reporting, Microsoft Office integration, regular feature updates and customisation capabilities, Dynamics 365 is extensively used by organisations of all sizes and sectors.

However, many organisations want a platform that is tailored to their industry or department requirements, without requiring extensive customisation. This is why we built Evo 365. Our accelerators allow you to benefit from Dynamics 365 with a platform tailored to your niche industry requirements.



Evo 365 FUNDRAISING

Streamline and manage fundraising and income management with grant and trust applications, major giving management, project tracking and Gift Aid automation.

Evo 365 MEMBERSHIP

Manage your members, payments and renewals with our membership management solution, giving you the tools to engage, retain and grow your member base.

Evo 365 NOT FOR PROFIT

Combining the features of Fundraising and Membership alongside additional features to give charities and non-profits the tools and functionality they need to focus on their mission.

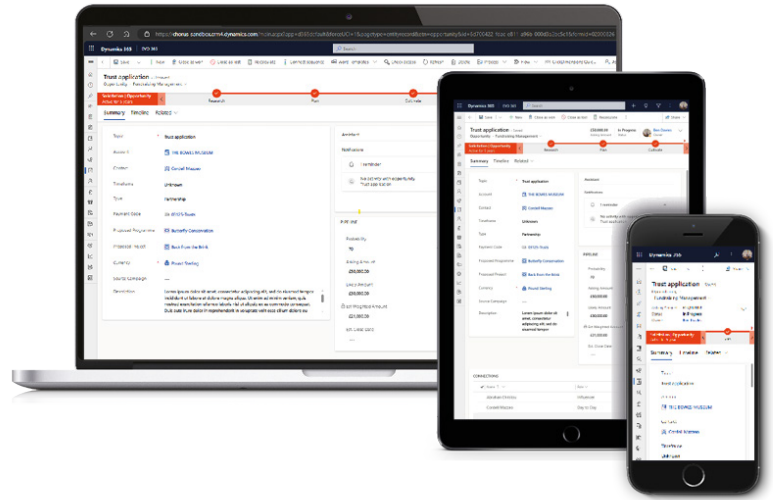


Why Dynamics 365?



Evo is built on Microsoft Dynamics 365, which means that you can benefit from all the features and advantages that come with Dynamics 365, as well as the features within Evo 365.

As one of the most popular CRM platforms globally, organisations choose Dynamics 365 for its flexible .NET architecture, simple user experience, progressive roadmap and integration with other familiar Microsoft applications.



Integration capabilities

Dynamics 365 natively integrates with Word, Excel and Outlook but you can also integrate it with other third party systems, such as financial software.



Powerful reporting

Anyone can quickly and easily create reports, charts and dashboards or integrate Evo 365 with Power BI to give powerful insights and analytics.



Intuitive to use

Staff can enjoy the familiar Microsoft user experience making it easy to use and can access Dynamics 365 from mobile apps or even while offline.



Exciting Roadmap

Dynamics 365 is regularly updated with new features, applications and improvements to give it an exciting long-term roadmap.

Industry Accelerators for Dynamics 365

We have been Microsoft Gold Partners since 2004 and help our clients to gain the most value from their Microsoft technologies. With deep expertise across Azure, Microsoft 365 and Dynamics 365, we provide a holistic approach, advising on best practices, licensing recommendations and the latest updates.

Microsoft Intelligent Security Association



Our fundraising accelerator for Dynamics 365 allows fundraising teams to effectively streamline and manage their fundraising efforts. By using Evo 365 Fundraising, teams can centralise and track their valuable data, automate time-consuming tasks, view and analyse advanced reporting and ultimately, improve fundraising success rates.

EVO 365 FUNDRAISING

Trust & grant management

Manage trust, grant and foundation applications with built-in workflows and activities guiding you through the seven stages of solicitation.

Individual giving & major donors

Track major donations from people and organisations to simplify management and nurture supporters.

Gift Aid management

Streamline Gift Aid with HMRC integration to automate claims, manage declarations and identify new opportunities.

Legacies & In-memory

Manage legacies, wills and in-memoriam donations to be able to effectively and sensitively carry out donors' wishes.

Project & programme tracking

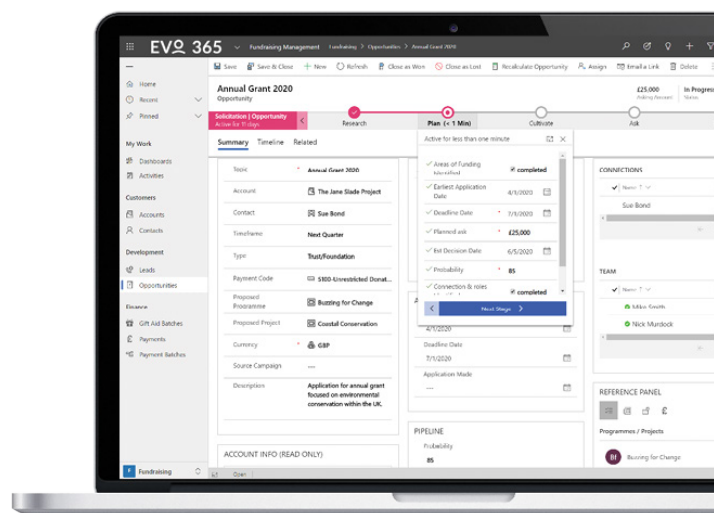
Track major donations from people and organisations to simplify management and nurture supporters.

Income & donation management

Streamline Gift Aid with HMRC integration to automate claims, manage declarations and identify new opportunities.

Why Evo 365 Fundraising?

- ❖ **Improve fundraising success** rates by streamlining funding applications with activity and deadline tracking.
- ❖ **Engage supporters** and build loyalty by tracking donations to projects to show supporters the results of their donations.
- ❖ **Grow your supporter network** with contact management to nurture relationships and identify opportunities.
- ❖ Understand key insights, such as most popular donation sources or projects, to **guide future decision making**.
- ❖ Automate manual tasks, such as Gift Aid claims, to **save your team valuable time** that can be better spent elsewhere.



Evo 365 Membership gives membership organisations the features and functionality they need to improve membership management, engagement and retention. As well as benefitting from the features within Dynamics 365, organisations can manage different types of memberships, automate Direct Debit processing and analyse sign-up trends and campaign success.

EVQ 365 MEMBERSHIP

Membership management

Centrally manage your memberships and contacts to gain a 360 view and track recurring revenue.

Membership analytics

Gain vital insights analyse sign-up trends and marketing ROI so that future investment is put into the most effective methods.

Direct Debit processing

Streamline payment processing with automated Direct Debit processing to streamline payments and simplify payment management.

Process automation

Enable pre-built workflows to send communications to reduce administrative tasks and deliver a great member experience.

Income management

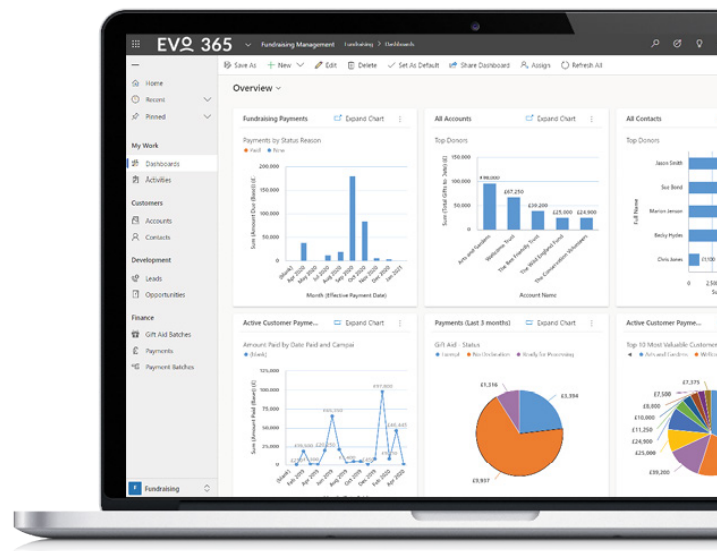
Easily track income and payments generated from different payment sources to give enhanced reporting and insights into revenue.

Self-service portal

Give your members a self-service portal to manage their membership and edit their personal information and communication preferences.

Why Evo 365 Membership?

- ❖ Automate and manage time-consuming tasks and processes to easily manage memberships and **save valuable time**.
- ❖ Provide a **great member experience** with self-service tools that keep pace with modern digital expectations.
- ❖ Use your valuable data to send tailored communications and **personalise member messaging** to increase engagement.
- ❖ Analyse sign-up behaviours and evaluate campaigns to **uncover trends** and guide future decision making.
- ❖ Ensure **GDPR adherence** with well managed communication preferences and subscriptions.



Evo 365 Not for Profit gives non-profits and charities a CRM solution that is tailored to their unique requirements whilst enjoying giving the benefit of the powerful features of Dynamics 365. From donation management to membership management, Evo 365 gives you the underlying technology to streamline operations, improve supporter engagement and automate manual tasks – so that you can focus on your mission.

EVQ 365 NOT FOR PROFIT

Fundraising features

Benefit from all the features within Evo 365 Fundraising, such as grant applications, legacies, donation management, Gift Aid and more.

Membership features

Access all the features of Evo 365 Membership to enjoy robust member management, payment processing and self-service portals.

Enhanced campaign management

Boost marketing by linking campaigns to causes, tracking budget and spend against results and income generated.

Batch payment entry

Easily enter batch payment data and manage offline donations, such as cash and cheques, to centralise income data for better reporting.

Online donations

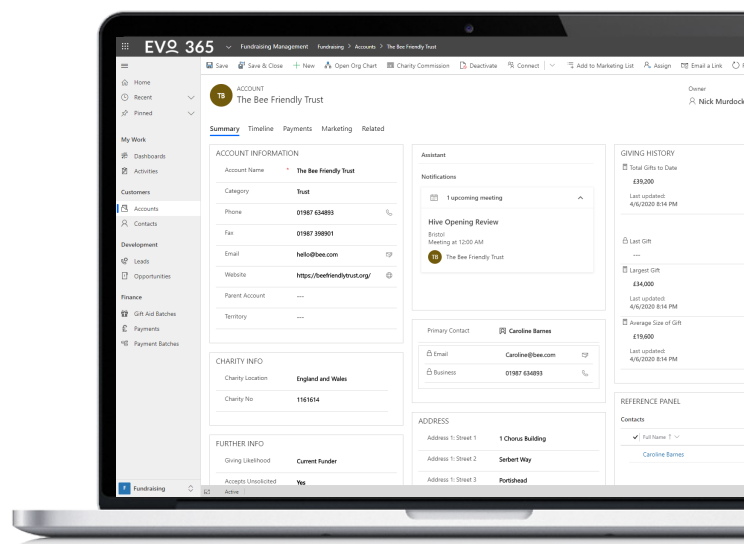
Integrate online donation endpoints with your website so supporters can easily donate online and track in Evo 365.

Advanced analytics

Enjoy powerful reporting with pre-built dashboards to easily view and analyse key metrics and historic trends.

Why Evo 365 Not for Profit?

- ❖ Automate and manage time-consuming tasks and processes to easily manage memberships and **save valuable time.**
- ❖ Provide a **great member experience** with self-service tools that keep pace with modern digital expectations.
- ❖ Use your valuable data to send tailored communications and **personalise member messaging** to increase engagement.
- ❖ Analyse sign-up behaviours and evaluate campaigns to **uncover trends** and guide future decision making.
- ❖ Ensure **GDPR adherence** with well managed communication preferences and subscriptions.



Chorus is a transformative Managed IT & Cyber Security Provider. We're on a mission to help organisations embrace secure cutting-edge Microsoft technologies to help them transform and succeed, underpinned by our 24/7/365 service desk and Cyber Security Operations Centre (CSOC).

Our Services:

- Business Applications
- Managed Services
- Modern Workplace
- Cyber Security
- Microsoft 365
- Dynamics 365
- Azure

Today, too many companies have to compromise when choosing an IT partner. Large IT service providers often deliver an impersonal and inflexible service, whilst smaller IT partners can be enjoyable to work with but lack the maturity and capability to deliver.

We offer a unique alternative that gives our clients the best of both worlds, by delivering enterprise-level IT services but with the agility and personality of a closely trusted partner.



Book a Demo

If you would like to find out more information about our cyber security services, or have any questions, please get in touch with our team today.



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