



Microsoft Cloud for Non-Profit

Fundraising Foundation

Microsoft Marketplace Solutions

Description of Service

Adopt a modern fundraising platform and contextualise your campaigns by rapidly moving to Microsoft Cloud for Nonprofit within three months.

Elevate your fundraising efforts with our premium 'Fundraising Foundation' service. This packaged service is designed to help charities quickly migrate to and start using Microsoft's Fundraising app from Microsoft Cloud for Nonprofit.

Thanks to our years of experience assisting Charities to transform with Microsoft technology, we have a templated and packaged approach to helping clients modernise their fundraising far faster, cheaper and with reduced risk than previously possible. Our aim is to get you live and actively fundraising on Microsoft's sophisticated Fundraising and Engagement platform within three months.

We can ensure a seamless transition to your new fundraising platform by offering pre-built templates to migrate data and on-demand training to help ensure your deployment is a success.

Key Features:

Development Module:

Overview: Comprehensive insight into your fundraising architecture.

Contacts, Organizations, Households: Streamlined management of all stakeholder data.

Opportunities & Funding Reports: Identify and track fundraising opportunities and outcomes.

Constituent profile: A single source of truth to an individual's relationship with your organisation, understand context, service history, fundraising efforts and household interactions in one single profile dashboard.

Fundraising Essentials:

Campaigns, Appeals, Packages: Design and manage diverse fundraising strategies with fundraising process flows that can be configured to your needs.

Marketing Lists: Targeted communication for effective outreach.

Gifts Management:

Transactions & Donor Commitments: Track every financial aspect with precision.

Payment Schedules, Gift Batches, Bank Runs: Efficient handling of donation inflows.

Receipts, Memberships, Payments: Comprehensive management of donor engagements.

Event Coordination:

Registration, Setup, Tables: End-to-end event management solutions.

Invoice Me & Event Receipts: Streamlined financial processing for events.

Training and Support:

On-demand User Guides & Videos: Empower your team with easy-to-access training materials, ensuring a smooth transition and efficient use of the platform.

Ongoing Support (Optional): Avail of our continuous support services for uninterrupted efficiency and problem-solving.

Additional Services:

Nonprofit Finance with Business Central: Integrate your financial management with our advanced solutions.

Advanced AI Marketing for Nonprofits: Utilize AI-driven marketing strategies for greater outreach.

Automated Gift Aid Claims & Large-Batch Direct Debit Processing: Simplify your financial operations and remain compliant with HMRC thanks to Kerv's own MC4N accelerator.

Benefits:

Seamless Integration: Effortlessly merge your existing processes with Microsoft Cloud for Nonprofit.

Customized Alignment: Tailor the platform to align perfectly with your organizational workflows.

Enhanced Efficiency: Streamline operations and boost fundraising efforts.

Data-Driven Insights: Make informed decisions with comprehensive data analysis.

Conclusion:


'Fundraising Foundation' is not just a service; it's your partner in driving nonprofit success. By embracing the power of Microsoft Cloud for Nonprofit, your organization can reach new heights in fundraising efficiency and impact. Elevate your mission with our expertly crafted solution.

Outcomes


Microsoft Azure Hosting Environment and Microsoft CRM Tenant



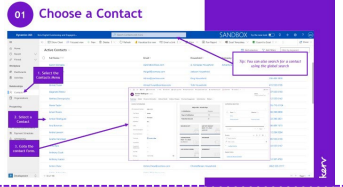
Installed and Configure Product / Solution



Automation Pipelines for future releases



User Guides in PDF & Video Format



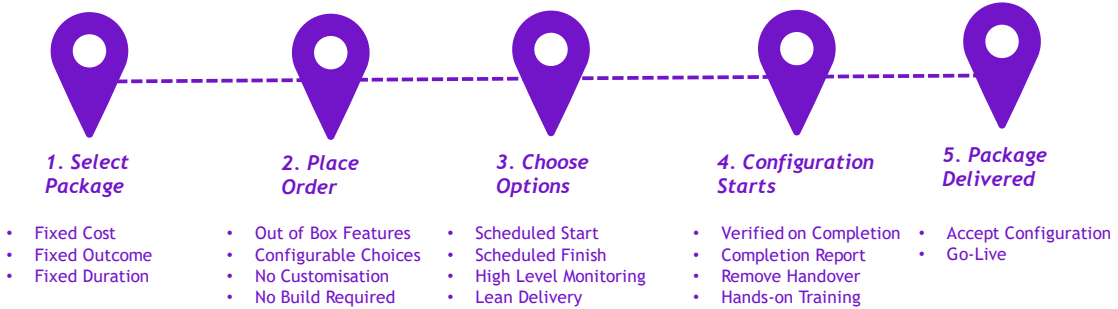
Kerv Innovate Delivery Model Aligned Teams for future projects



Future Roadmap Recommendations



Fixed Cost, Product Deployment & Configuration



Acceptance Approach

Consultant
Validates
Solution Meets
Requested
Configuration



Feature: Regular Donation Creation		
<u>Outcome</u>		
As a User you will be able to do this within these constraints		
<u>Configuration Choices</u>		
Area	Choice	Selection
Donation Methods	Income Types	
	Direct Debit	Yes
	Cash	Yes
	Cheque	Yes

Major Gift - Scholarships

In Solicitation: Propose

Days in Solicitation: 200

Potential Amount: £0

RECURRING GIFT

NEXT: SEP 1

LAST: AUG 11

£50.00

LAST GIFT AMOUNT

AUG 25, 2020

£10.00

LIFETIME GIVING

AUG 25, 2020

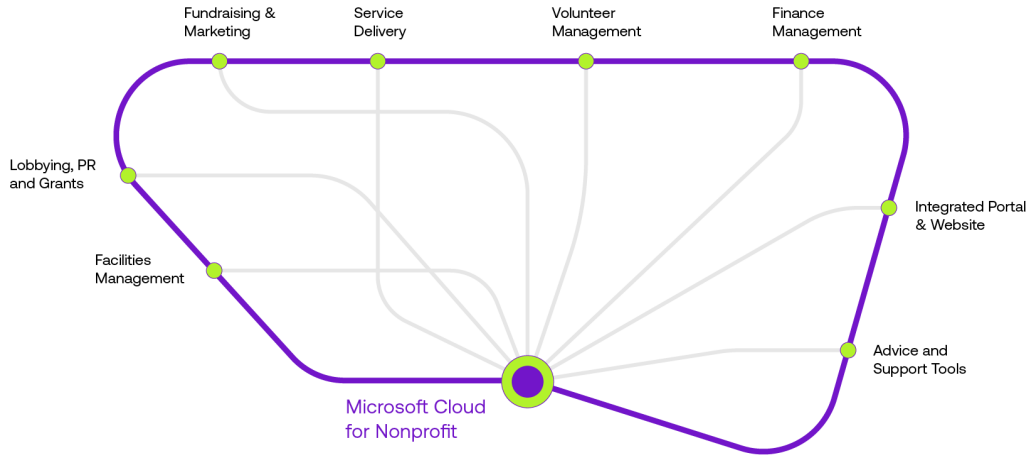
£5,164.33

INFLUENCED

LAST GIVING CHANNEL

PHONE

MEMBERSHIP



Dynamics 365 Fundraising and Engagement

Save Save & Close + New Update Address Add Gift Add Registration Add Pledge Match Add Credit Card Update Credit Card

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 Househ...

Morales - Carmack Family Maternal Health

In Solicitation: Close

Days in Solicitation: 1

Potential Amount: \$25,000.00

RECURRING GIFT

CANCELLED

LAST: OCT 7 10.00

LIFETIME GIVING

JAN 1, 1970

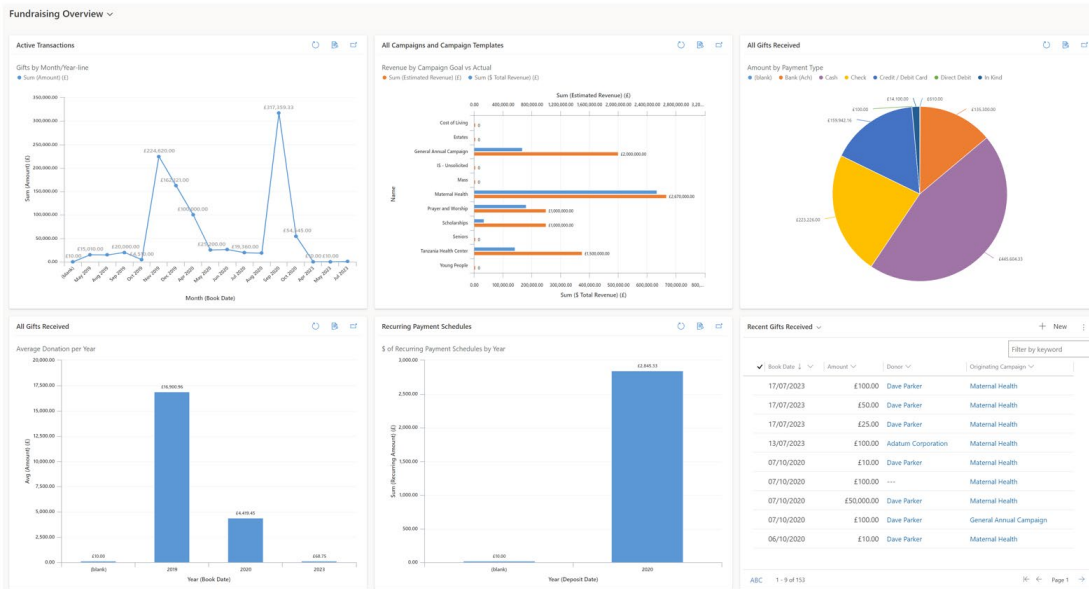
SUPPORTING OBJECTIVES

- Maternal Health
- Ianzania Maternal Health

Timeline

Search timeline

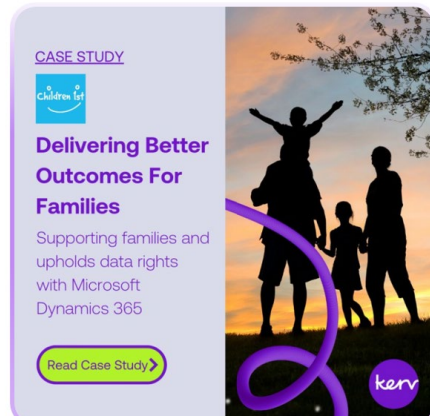
Enter a note...



kerv



Kerv Digital is the UK's trusted NFP partner delivering social impact through Microsoft solutions



"the extensibility of Dynamics 365 gives us flexibility to work with third party connectors where required."

"We have the foundation in place with Microsoft Cloud for Nonprofit and its common data model. It's a mature platform that is proven to work." Gous Uddin, Head of CRM Transformation, Water Aid

We now have a system that uses terms such as 'families' and 'people' ... We don't talk about cases or interventions anymore, it's about making connections and building relationships." Eileen Scouler, head of IT, Children 1st

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