

xRM: Better CRM for Fundraising & University Advancement

Say goodbye to old, cumbersome CRM tools and say hello to xRM, a disruptive, cloud-based, endlessly-customizable fundraising platform built on Microsoft's popular Dynamics 365 system.

The xRM solution is a full-service solution for University constituent management and fundraising. It is designed to allow organizations to simplify and improve the processes of donor, prospect and gift management, and to provide outputs that help raise more money.





Next generation of business applications

Transform your advancement office into the digital age. Empower your team to successfully analyze data in real time from anywhere. Leverage the intelligent Microsoft cloud and productivity applications to collaborate, take advantage of new trends, disrupt, and innovate quickly. Anticipate and respond to donor and constituent needs in real-time. Develop long term and meaningful relationships.

Modern. Intelligent. Adaptable.

You can easily configure our solution to match your exact needs. Microsoft is responsible for keeping the application current and since it is delivered in the cloud you always have the most current version.



Better and faster results

More quality work in less time. Configure xRM to increase productivity by delivering only the data that matters to you. Easily configure your own dashboards. Better BI. You can fully customize and extend our solution to fit your unique needs and speed up your daily tasks. Behind the scene, xRM stays up-to-date automatically and evolves to a constantly changing technology landscape.



Lasting relationships

Build more meaningful relationships with people that make a difference. With our advanced data tracking and personalized insights, create a better donor experience and increase alumni engagement.





Security

Focus on your advancement goals and let Microsoft handle your database security. You have full control and tracking over department and multi-campus access. Microsoft cloud services are built on a foundation of trust and security. Microsoft provides you security controls and capabilities to help you protect your data and applications.



Common Data Model

With the purpose of facilitating consistent data across an advancement office, Microsoft has published accelerators that are part of the Common Data Model (CDM).

Key Differentiators

Strategy. Campus Management & xRM strategic partnership and out of the box integration between Engage and xRM.

Microsoft Certified. xRM Solution is AppSource certified and is built on top of Microsoft Dynamics and the Dynamics 365 Higher Education Accelerator which leverages a Common data model (CDM) and a Unified Interface.

Adaptability. The xRM Solution is the most adaptable Advancement solution on the market and can be adapted to your unique environment. While most of the other solutions force their proprietary processes and methodologies into their product which is difficult to change, xRM is delivering a highly customizable solution that sits on a Microsoft platform and can be consumed in either an on-premises model or via the secure Microsoft cloud.

Integration. We provide SQL tables that customers can transfer data into. With other solutions you will have to write custom code or leverage third party tools. Our solution includes a simple mechanism to use for data migrations & integrations.

Extensibility. Unlike most rigid systems, xRM allows application developers to discover and use extensions with no configuration required. Extension developers easily encapsulate code and avoid fragile hard dependencies.

HEPdata. Is your higher education institution and/or non profit organization already using HEP? If so, we have you covered with our out of the box direct integration with HEP to process matching gifts.

DIY Administration. The xRM Solution is easy to administer and configure and provides the ability to be internally implemented and managed if so desired.

Base Solution

Bio	Constituent Tracking Name History Communication Preferences Related Identifiers Householding Education Interests / Associations Document Management	Organization Tracking Address Details Social Media Profiles Relationships Employment Affiliations Sensitive Information Volunteerism
Giving	Gift Entry Commitments Credit Gift Premiums Modification Tracking Allocations	Batches Employee Giving Matching Gifts Recurring Gifts Anonymous Giving Reconciliation
Stewardship	Gift Receipts Gift Totals	Interaction Plans Activity Tracking
Prospect	Opportunities Assignment Research Reports	Moves Management Contact Reports