



Dynamics 365 Nonprofit Accelerator Walkthrough

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Introduction

The Microsoft Dynamics 365 Nonprofit Accelerator is a solution designed to extend and enhance Dynamics 365 with day-to-day nonprofit constituent management, fundraising, award and program delivery capabilities. The Accelerator contains installable applications with standard entity attribute extensions, nonprofit entities and attributes, pre-built dashboards, workflows, sample data, as well as other tools to help customers and partners build and deploy nonprofit solutions.

This documentation provides a walkthrough of key components of the core Nonprofit Accelerator solution. The solution also includes optional IATI and Volunteer Management add-ons, which are documented separately.

Personas

This walkthrough was created with the following nonprofit personas in mind:

1. **Fundraiser:** The Fundraiser will use the system to facilitate constituent management and execute fundraising.
2. **Award Manager:** The Award Manager will use the solution to facilitate constituent management and manage awards.
3. **Program Manager:** The Program Manager will use the solution to plan for and execute nonprofit programs and track results.
4. **Field Staff:** The Field Staff will use the solution to facilitate constituent management and track results of nonprofit programs.
5. **Leadership:** Leadership will use the system to gain insights into nonprofit operations.

Additional Resources

Additional resources about Microsoft Industry Accelerators can be found on Microsoft Docs [here](#). Specific references for the Nonprofit Accelerator can be found on Microsoft Docs [here](#) and on AppSource [here](#).

Constituent Management

The Nonprofit Accelerator includes an extensible model for nonprofit constituent types, including:

Constituents	
Individuals	Individuals Any person with whom a nonprofit has a relationship. The person may be a donor, volunteer, advocate, member, etc. Individuals are Contacts.
Donors	
Volunteers	
Households	Households Any family or partner grouping of people with which a nonprofit has a relationship. Households are Accounts.
Accounts	
Organizations	
Benefit Recipients	Benefit Recipients Any person or entity that is the recipient of the benefit of a nonprofit's activities.

View Individual

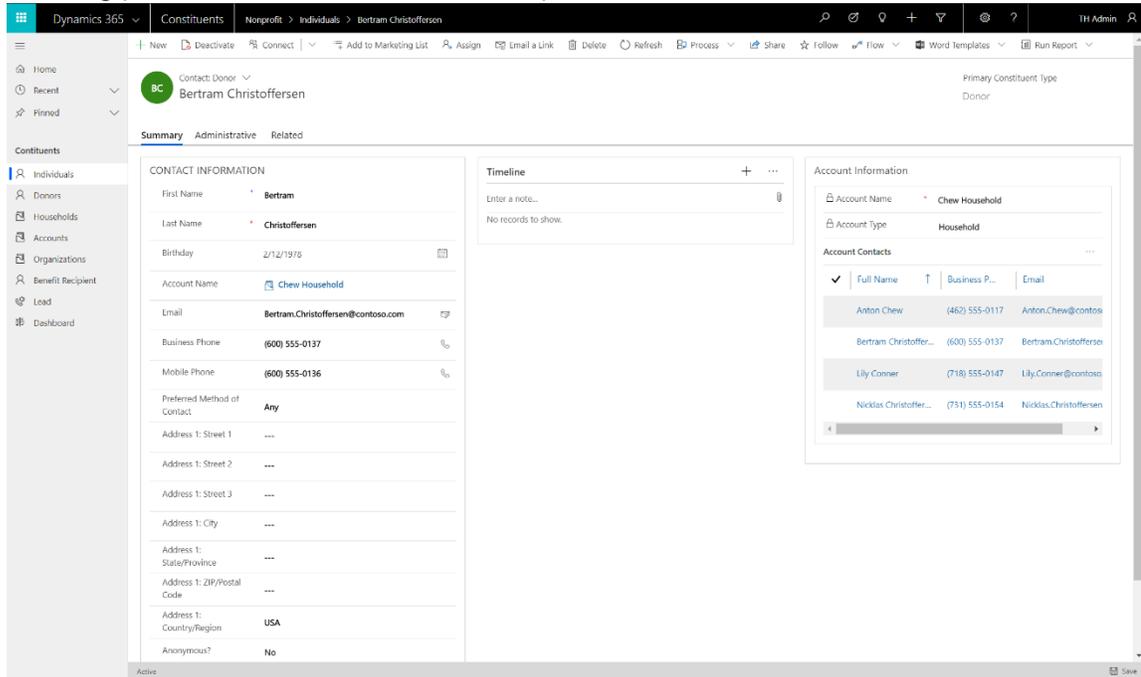
1. Using the search bar, search for an Individual (Contact) record named **Bertram Christoffersen**.



2. Click on the record for **Bertram Christoffersen** in the Search Results.



3. View the Individual Profile Page for **Bertram Christoffersen**. Bertram is a Donor, as identified by the Primary Constituent Type value. Profile information about the constituent is available including phone, email, address, account and preferred contact method details.



The screenshot displays the Individual Profile Page for Bertram Christoffersen in Microsoft Dynamics 365. The page is divided into several sections:

- Contact Information:** A table listing personal details such as First Name (Bertram), Last Name (Christoffersen), Birthday (2/12/1978), Account Name (Chew Household), Email (Bertram.Christoffersen@contoso.com), Business Phone ((600) 555-0137), Mobile Phone ((600) 555-0136), Preferred Method of Contact (Any), and Address 1 (Street 1, Street 2, Street 3, City, State/Province, ZIP/Postal Code, Country/Region (USA), Anonymous? (No)).
- Timeline:** A section for notes with the text "Enter a note..." and "No records to show."
- Account Information:** A section showing Account Name (Chew Household) and Account Type (Household).
- Account Contacts:** A table listing other contacts in the household, including Anton Chew, Bertram Christoffersen, Lily Conner, and Niklas Christoffersen, with their respective phone numbers and email addresses.

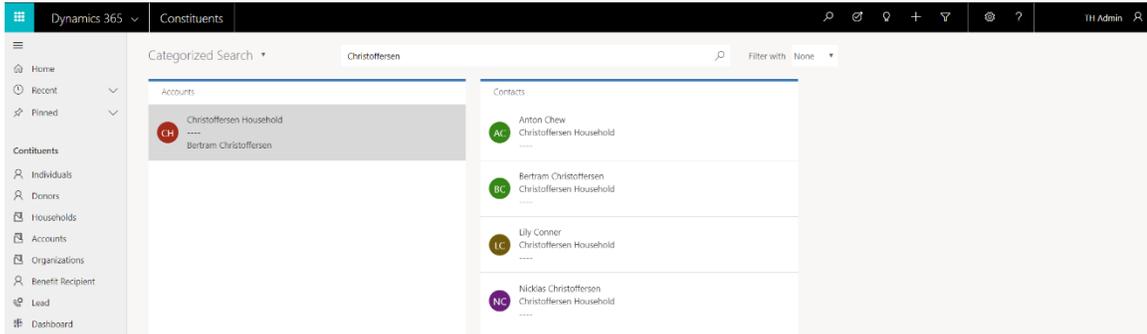
4. Bertram's Household Information is available on the right side of the profile. Bertram is a member of the Chew Household, along with three other individual Contacts (Anton Chew, Lily Conner and Niklas Christoffersen).
5. Individual profiles include the following components, enabling complete profiling of Individual Constituents (available via **Related**):
 - a. Addresses – any number of addresses
 - b. Connections – any number of connections to other Individuals and/or Organizations
 - c. Education – current and/or historical Education
 - d. Employment History – current and/or historical Employment
 - e. Memberships – any number of Memberships by Membership Category
 - f. Preferences – any number of classifications, groups, tags, etc. for use in profiling to support constituent engagement and/or marketing
 - g. Salutations – any number of names

View Household

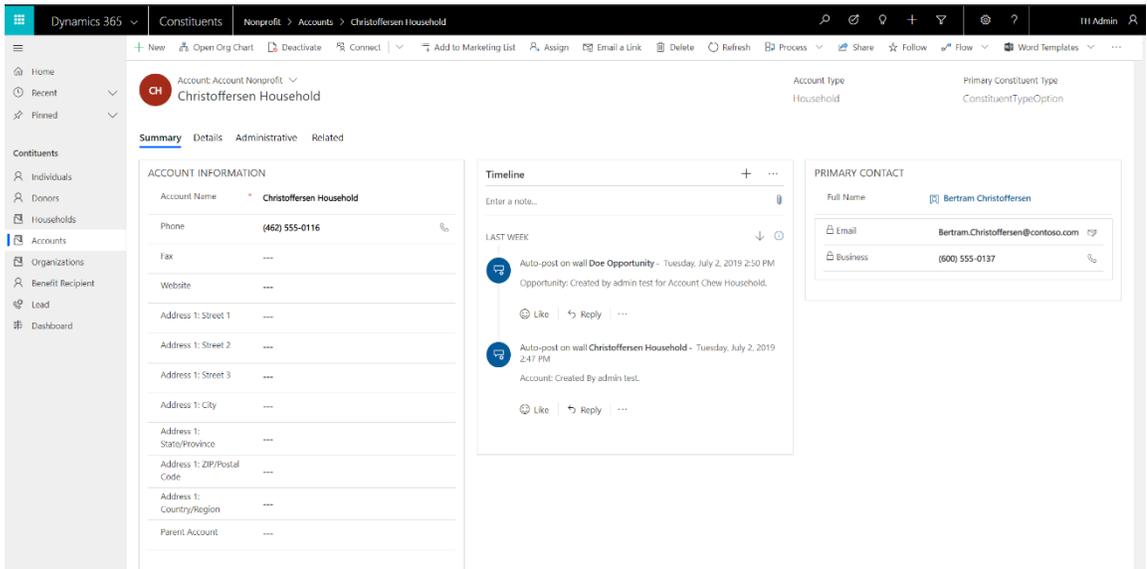
- Using the search bar, search for a Household (Account) record named **Christoffersen Household**.



- Click on the record for **Christoffersen Household** in the Search Results.



- View the Household Profile Page for **Christoffersen Household**. This Household has a Primary Contact, Bertram Christoffersen, as identified by the Primary Contact. Profile information about the Household is available including phone, email, address, account and preferred contact method details.



- Household profiles include the following components, enabling complete profiling of Household Constituents (available via **Related**):
 - Contacts – any number of Individual Contacts included in the Household
 - Addresses – any number of addresses
 - Connections – any number of relationships to other Individuals and/or Organizations
 - Memberships – any number of Memberships by Membership Category

- e. Preferences – any number of classifications, groups, tags, etc. for use in profiling to support constituent engagement and/or marketing
- f. Salutations – any number of names

View Benefit Recipient

1. Benefit Recipients connect nonprofit program activities to the subjects that benefit from the nonprofit’s program related activities. Benefit Recipients can be linked to an Account, Contact or Resource Catalogue. A linked Account represents a legal entity. A linked Contact represents a person. A linked Resource Catalogue represents an entity that is not a legal entity, i.e. a beach, sculpture, animal, etc.
2. Navigate to the **Constituents** sample application and select **Benefit Recipient** in the left navigation.

Name	Description	Benefit Recipient Type	Beneficiary	Resource Catalog	Parent Benefit Recipient
Celik Korkmaz	---	Contact	Celik Korkmaz	---	---
Clare Casey	---	Contact	Clare Casey	---	---
Contoso Beach	Beach	Other	Friends of Contoso Beach	Beach	---
Contoso School	---	Account	Contoso School	---	---
Delia Schroeder	---	Contact	Delia Schroeder	---	---
Earl Lauer	---	Contact	Earl Lauer	---	---
Endangered species 1	---	Other	---	Endangered species 1	---
Helena Wilcox	---	Contact	Helena Wilcox	---	---

3. This view provides several examples of Contact, Account and Other Benefit Recipients. Other is a placeholder value that represents Benefit Recipients that are neither Accounts nor Contacts and can be updated to meet customer requirements.
4. Select the **Delia Schroeder** Benefit Recipient. This record is a Contact, as defined by the Benefit Recipient Type “Contact,” and the Beneficiary lookup “Delia Schroeder.”

DELIA SCHROEDER

Parent Benefit Recipient: ---

Benefit Recipient Type: Contact

Status: Active

General Administrative Related

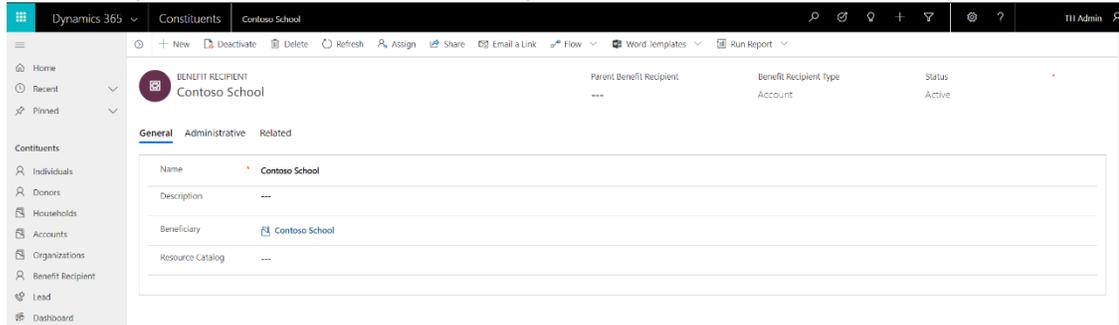
Name: Delia Schroeder

Description: ---

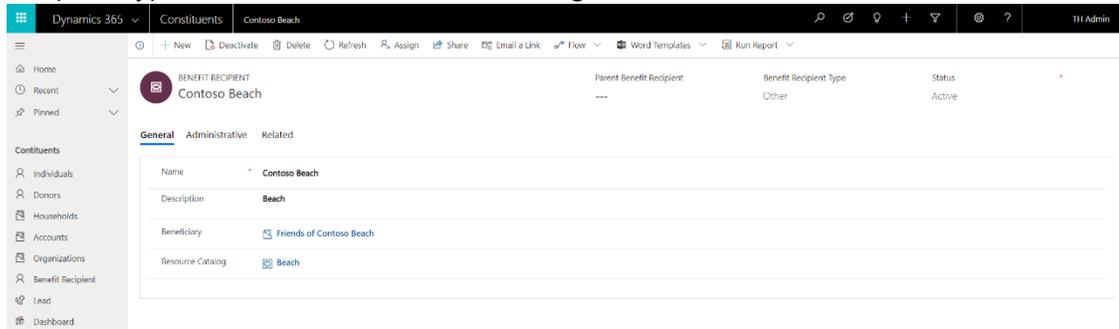
Beneficiary: Delia Schroeder

Resource Catalog: ---

5. Select the **Contoso School** Benefit Recipient. This record is an Account, as defined by the Benefit Recipient Type "Account," and the Beneficiary lookup "Contoso School."



6. Select the **Contoso Beach** Benefit Recipient. This record is a beach, as defined by the Benefit Recipient Type "Other," and the Resource Catalog "Beach."

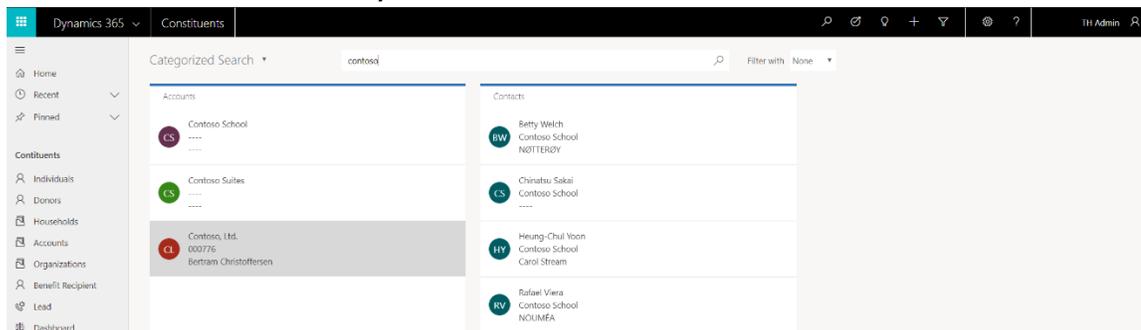


View Organization

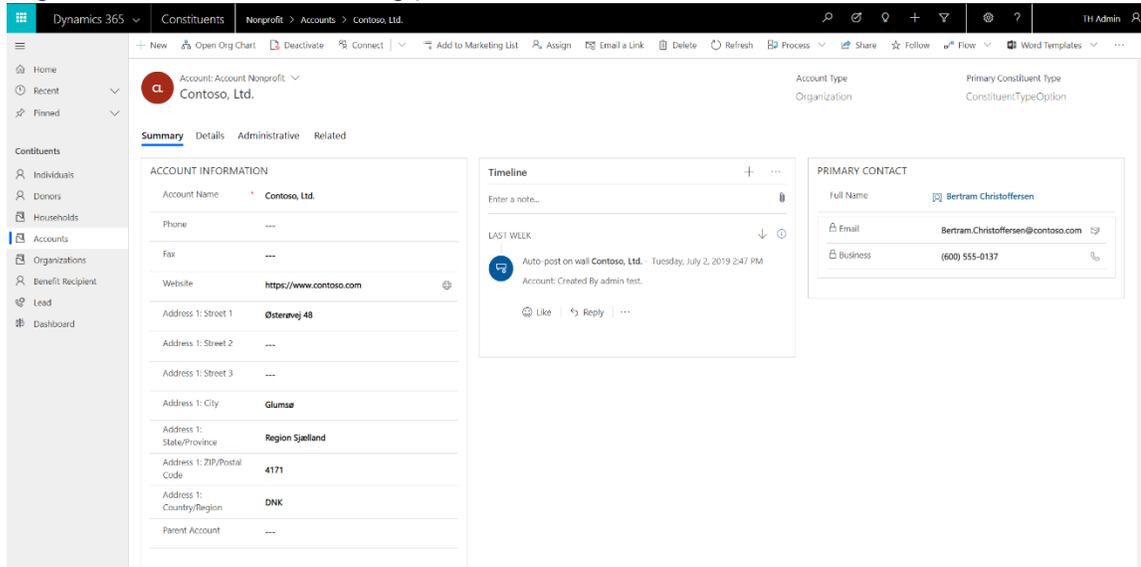
1. Using the search bar, search for an Organization (Account) record named **Contoso, Ltd.**



2. Click on the record for **Contoso, Ltd.** in the Search Results.



3. View the Organization Profile Page for **Contoso, Ltd.** This Organization has a Primary Contact, Bertram Christoffersen, as identified by the Primary Contact. Profile information about the Organization is available including phone, email, website and address details.



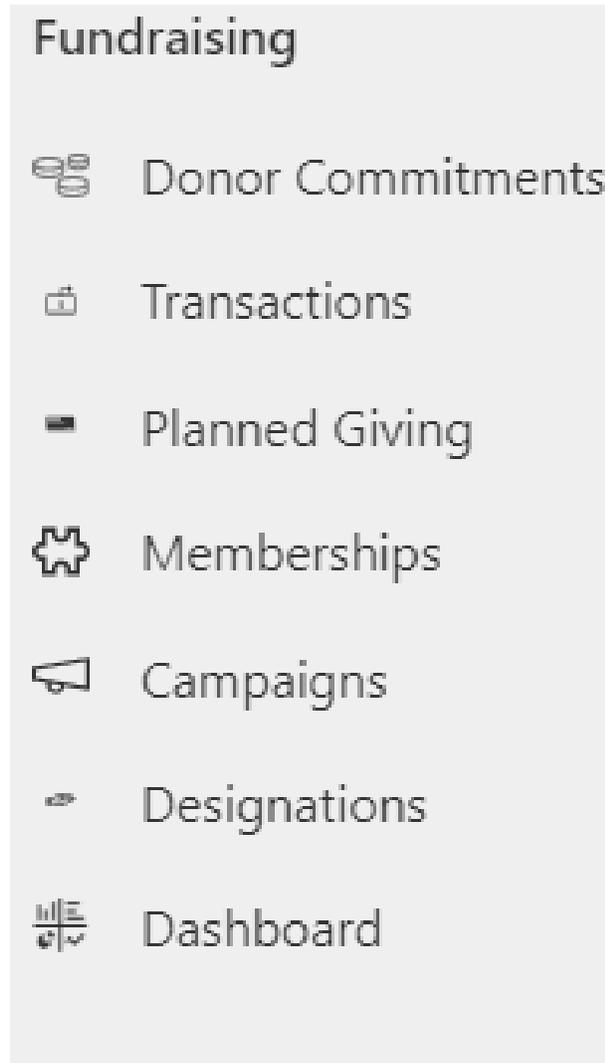
The screenshot shows the Dynamics 365 interface for the organization profile of Contoso, Ltd. The page is divided into several sections:

- Summary:** Contains account information such as Account Name (Contoso, Ltd.), Phone, Fax, Website (https://www.contoso.com), and Address 1 (Street 1: Østervej 48, City: Glumse, State/Province: Region Sjælland, ZIP/Postal Code: 4171, Country/Region: DNK).
- Timeline:** Shows a recent activity: "Auto-post on wall Contoso, Ltd. - Tuesday, July 2, 2019 2:47 PM" with the note "Account: Created By admin test."
- Primary Contact:** Lists contact details for Bertram Christoffersen, including Email (Bertram.Christoffersen@contoso.com) and Business phone number ((600) 555-0137).

4. Organization profiles include the following components, enabling complete profiling of Organization Constituents (available via **Related**):
 - a. Contacts – any number of Individual Contacts included in the Organization
 - b. Addresses – any number of addresses
 - c. Connections – any number of relationships to other Individuals, Households and/or Organizations
 - d. Memberships – any number of Memberships by Membership Category
 - e. Preferences – any number of classifications, groups, tags, etc. for use in profiling to support constituent engagement and/or marketing
 - f. Salutations – any number of names

Fundraising

The Nonprofit Accelerator includes an extensible model for standard nonprofit fundraising, including:



Donor Commitments

An actual or prospective agreement between a donor and an organization for the donor to make a gift to the organization.

Transactions

Transactions (also referred to as donations) represent payments from a constituent to the nonprofit.

Planned Giving

A planned gift is a gift made during a donor's lifetime or at the time of their death that involves their estate and/or tax planning.

Memberships

Representation of a Constituent Membership.

Campaigns

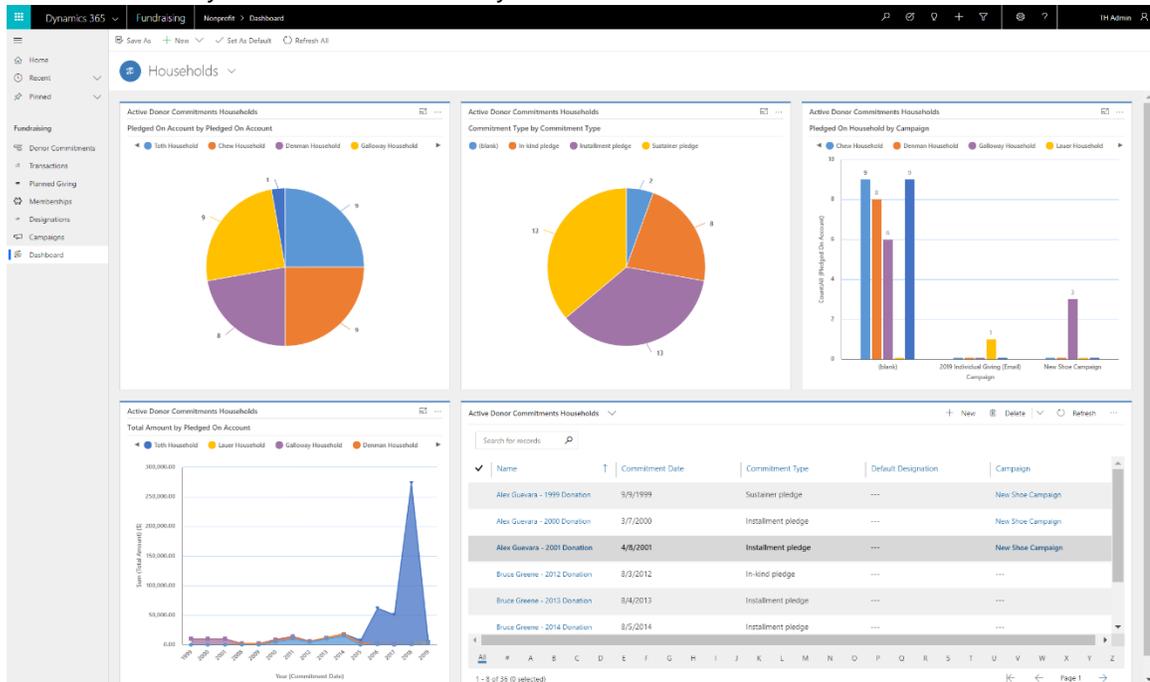
Container for constituent engagement activities and responses and lists to create, plan, execute, and track the results of a specific marketing campaign through its life.

Designations

An area to which funds may be allocated, including a GL-relevant accounting code. Designations are the way a donor instructs the nonprofit to direct their donation.

View Fundraising Dashboard

1. Navigate to the **Fundraising** sample application.. Select **Dashboard** from the left navigation.. The sample Household dashboard displays several key insights:
 - a. Donor Commitments pledged by Account
 - b. Donor Commitments by Type
 - c. Donor Commitments pledged by Campaign
 - d. Total amount pledged over time
 - e. List of key Donor Commitments by Households



View Donor Commitment

1. Using the search bar, search for an Individual (Contact) record named **Bertram Christoffersen**.



2. Click on the record for **Bertram Christoffersen** in the Search Results.



- View the Individual Profile Page for **Bertram Christoffersen**. This Individual is a Donor, as identified by the Primary Constituent Type value "Donor." Profile information about the constituent is available including phone, email, address, account and preferred contact method details.

The screenshot shows the Dynamics 365 interface for the individual profile of Bertram Christoffersen. The primary constituent type is 'Donor'. The page is divided into several sections:

- CONTACT INFORMATION:**
 - First Name: Bertram
 - Last Name: Christoffersen
 - Birthdate: 2/12/1978
 - Account Name: Chew Household
 - Email: Bertram.Christoffersen@contoso.com
 - Business Phone: (600) 555-0137
 - Mobile Phone: (600) 555-0136
 - Preferred Method of Contact: Any
 - Address 1: Street 1, Street 2, Street 3, City, State/Province, ZIP/Postal Code, Country/Region (USA), Anonymous? (No)
- Timeline:** A section for recording events, currently empty with the text "No records to show."
- Account Information:**
 - Account Name: Chew Household
 - Account Type: Household
 - Account Contacts:** A list of contacts including Anton Chew, Bertram Christoffersen, Lily Conner, and Nicklas Christoffersen, each with their full name, business phone, and email.

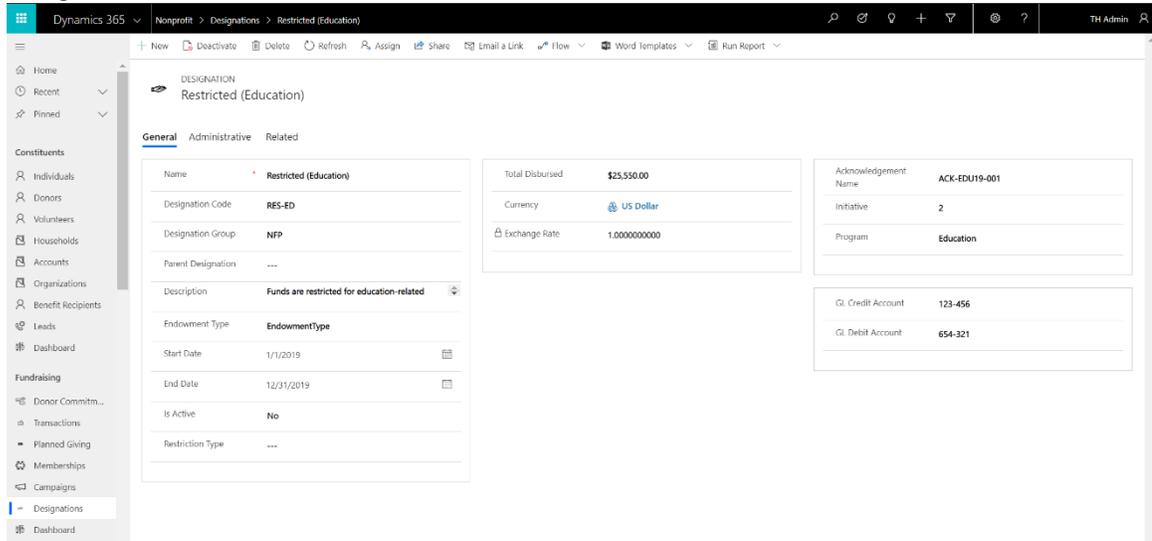
- Click on **Related** and select **Donor Commitments**, to view Bertram's Donor Commitments. Each Donor Commitment record represents Bertram's commitment to donate to the Nonprofit. This view displays three commitments on three different dates in 2016, 2018 and 2019. Note each record is linked to a Default Designation.

The screenshot shows the 'Donor Commitments' view for Bertram Christoffersen. The view displays a table of three commitment records:

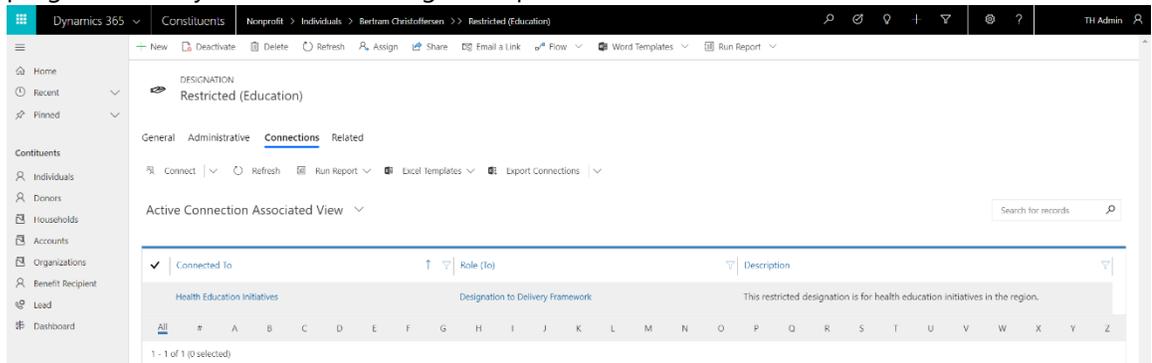
Name	Commitment Date	Commitment Type	Default Designation	Campaign
Christoffersen - 2016 Donation	1/3/2016	Installment pledge	Restricted (Advocacy)	---
Christoffersen - 2019 Donation	1/5/2019	Installment pledge	Restricted (Education)	---
Christoffersen - 2018 Donation	1/4/2018	In-kind pledge	General Operating (Unrestricted)	---

Below the table, there is a search bar and a grid of letters (A-Z) for filtering. The status at the bottom indicates "1 - 3 of 3 (0 selected)".

- The Default Designation on a Donor Commitment represents the project or fund the commitment is for – this may be a restricted or unrestricted Designation. Click on the link for the Default Designation **Restricted (Education)** on Bertram’s 2019 Donor Commitment to view the Designation:



- On the Restricted (Education) Designation, click on **Related**, then **Connections**. The Connections define how the Designation is related to Delivery Framework(s), indicating which funds are allocated to which program delivery activities. In this case, Bertram’s Donor Commitment is designated for the Restricted (Education) Designation which is connected to the Health Education Initiatives Delivery Framework. These links associate Bertram’s commitment to the nonprofit’s Health Education Initiatives activities, ensuring Bertram’s restricted donation is directed to program delivery activities according to his preference.



View Planned Gift

1. Navigate to the **Fundraising** Sample Application, view **Planned Giving**:

The screenshot shows the Dynamics 365 Fundraising application with the 'Planned Giving' view selected. The table displays the following records:

Name	Account	Campaign	Affiliation	External ID
Request \$125,000 (Sines)	Humongous Insurance	2018 FY19 Q2 Planned Giving	NGO	---
Request \$500,000 (Campbell)	Antunes Household	2019 FY19 Q2 Planned Giving	NGO	---
Charitable Gift Annuity \$750,000 (Suevara)	Galloway Household	2019 FY19 Q2 Planned Giving	NGO	---
Insurance \$750,000 (Langelsand)	Wilcox Household	2018 FY18 Q2 Planned Giving	NGO	---
Trust \$50,000 (Simios)	Sarkozi Household	2018 FY19 Q2 Planned Giving	---	---

2. Click on the record for **Trust \$50,000 (Simios)**. The Planned Gift profile includes information related to tracking typical nonprofit prospective and/or actual planned gifts.. The sample record below is related to the Sarkozi Household.

The screenshot shows the detailed record for 'Trust \$50,000 (Simios)' under the 'Sarkozi Household' account. The record is categorized as 'PLANNED GIVING'.

General Information:

- Name: Trust \$50,000 (Simios)
- Account: Sarkozi Household
- Affiliation: ---
- Campaign: 2018 FY19 Q2 Planned Giving
- External ID: ---
- Currency: US Dollar
- Exchange Rate: 1.0000000000
- Contract Date: ---
- Stage: ---
- Deceased?: No
- Bequest Type: ---
- Ordinary Income: \$50,000.00
- Designated Organization %: 90.00000
- Designated Principle Amount: \$50,000.00
- Face Value: \$50,000.00
- Designation: Restricted
- Endowment Type: Current operations

Financial Summary:

- Capital Gain Income: \$50,000.00
- Cash Surrender Value: \$50,000.00
- Charitable Deduction: \$50,000.00
- Tax Free Income: \$50,000.00

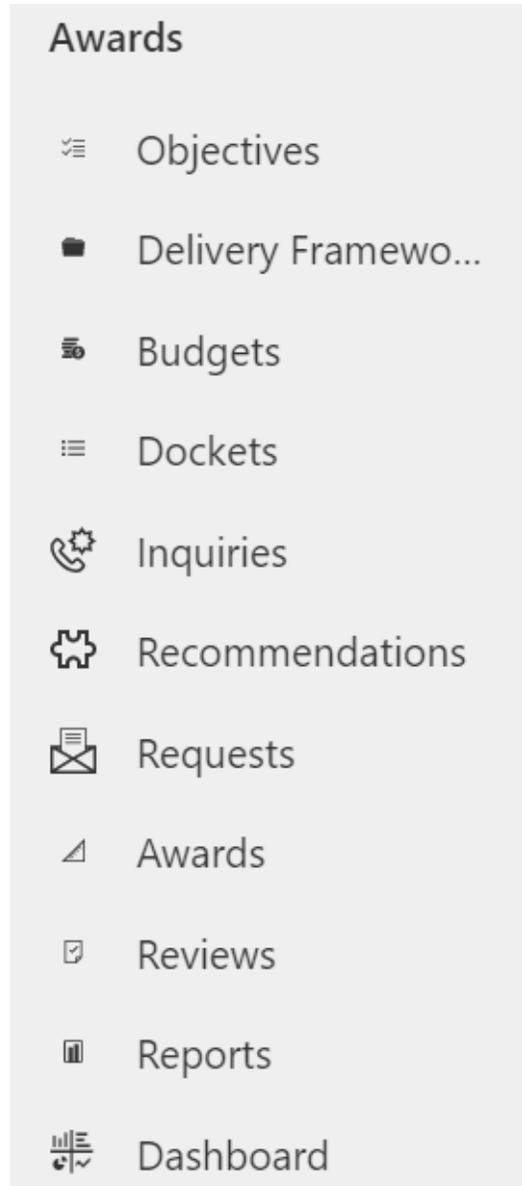
Management & Dates:

- Type of Management: Outside - donor self-trustee
- Date Management Agreement Signed: 1/15/2025
- Date Organization Notified of Intention: 1/15/2025
- Rollup Giving: ---
- Salvage Value of Buildings: ---
- Sever Date: ---

3. Planned Gift profiles include the following **Related** components, enabling end-to-end management of the planned giving process:
 - a. Connections – represents a link to a related entity or stakeholder.
 - b. Donor Commitment – represent the actual or prospective agreement or agreements between a donor and an organization for the donor to make a gift to the organization. Donor Commitments can be linked to a planned gift at any time during the process.
 - c. Payment Asset – represents the asset or assets associated with specific types of payments including, but not limited to, in-kind gifts, stocks and securities.

Awards

The Nonprofit Accelerator includes an extensible model for standard nonprofit Awards (i.e. Grant, Scholarship) types, including:



Objectives

One or more high-level priorities for the nonprofit. For example: "End Poverty" or "Equitable Access to Education." Objectives can be structured into any hierarchy.

Budgets

An allocation of funds to support achievement of Objectives.

Delivery Frameworks

A unit of work via which a nonprofit, or third parties, achieves Objectives. Delivery Frameworks can be structured into any hierarchy, i.e., a program with multiple projects and tasks.

Requests

A request from an individual or institution for funding or support.

Awards

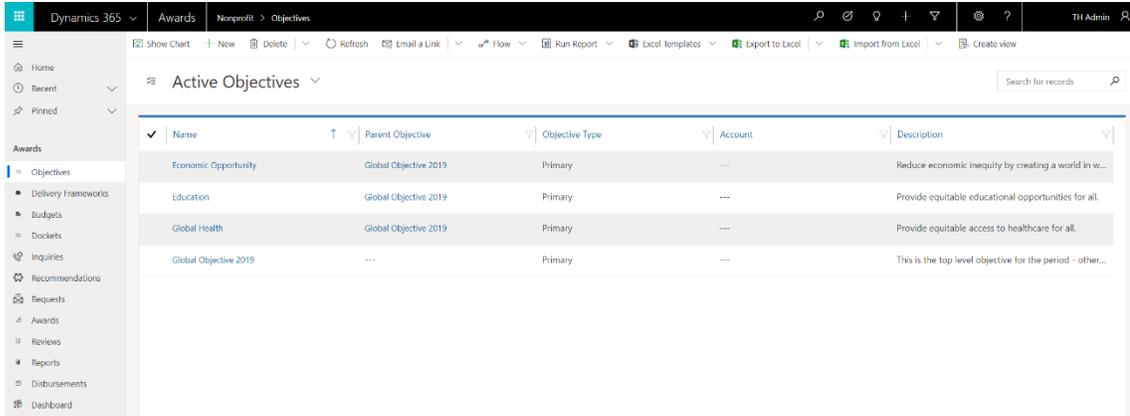
An agreement to provide or receive funding or support.

Disbursements

A payment related to an Award.

View Award Disbursements

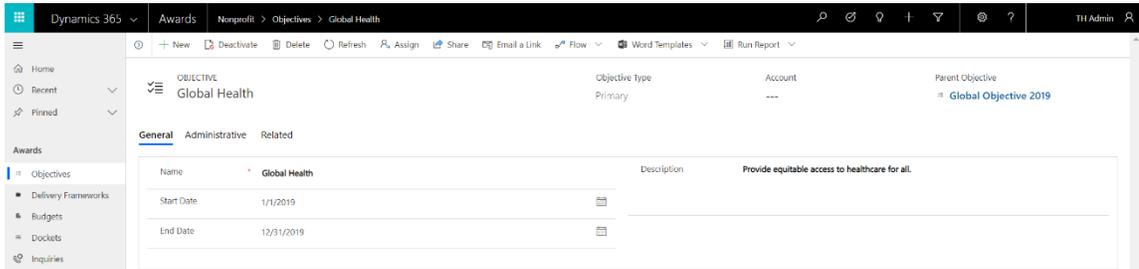
1. Navigate to the **Awards** Sample Application, view the Objectives by selecting **Objectives** in the left navigation:



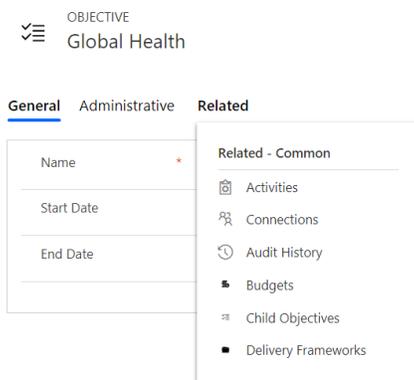
The screenshot shows the Dynamics 365 interface for the Awards Nonprofit application. The left navigation pane is open to 'Objectives'. The main content area displays a table of 'Active Objectives'.

Name	Parent Objective	Objective Type	Account	Description
Economic Opportunity	Global Objective 2019	Primary	---	Reduce economic inequality by creating a world in w...
Education	Global Objective 2019	Primary	---	Provide equitable educational opportunities for all.
Global Health	Global Objective 2019	Primary	---	Provide equitable access to healthcare for all.
Global Objective 2019	---	Primary	---	This is the top level objective for the period - other...

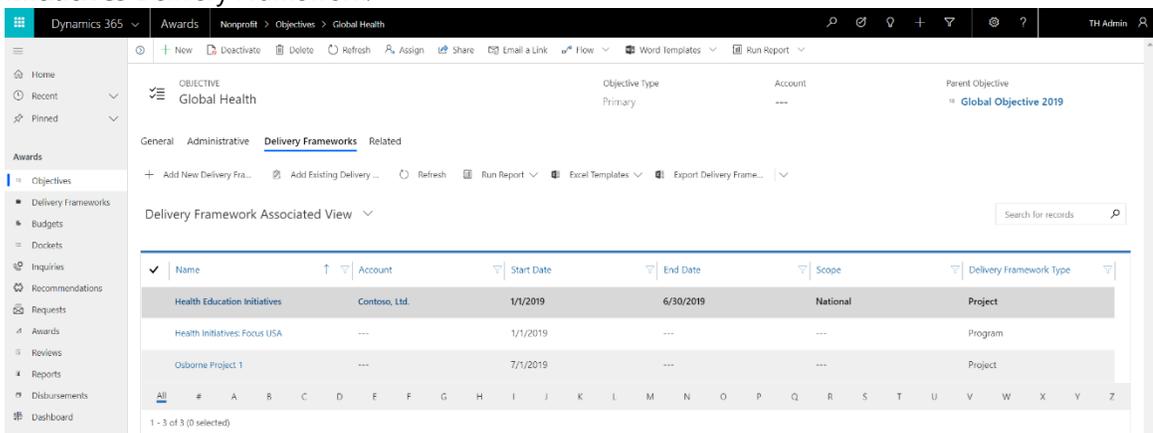
2. Select the **Global Health** Objective. The nonprofit’s objective for Global Health is to “Provide equitable access to healthcare for all.” This objective is scheduled for January 1 through December 31, 2019:



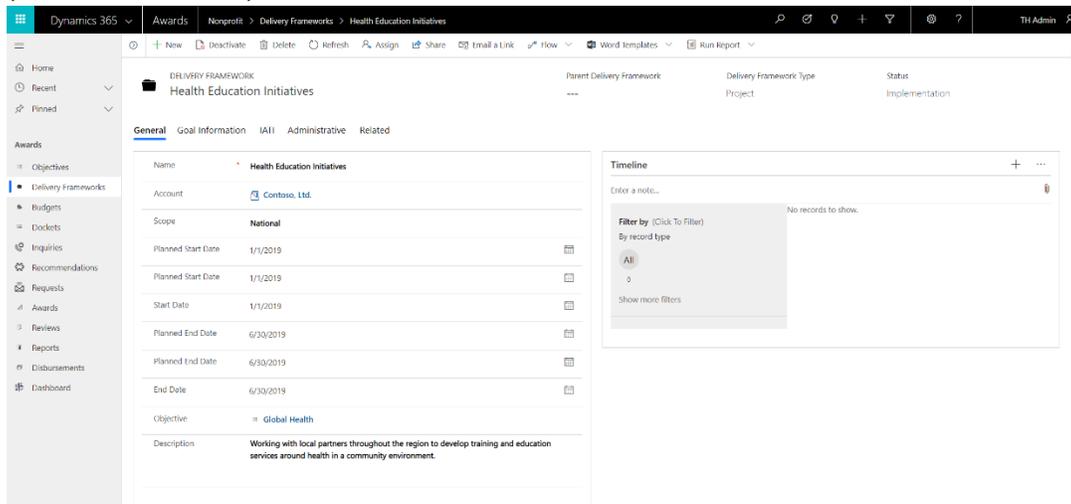
3. On the Global Health Objective, click on Related, then **Delivery Frameworks**.



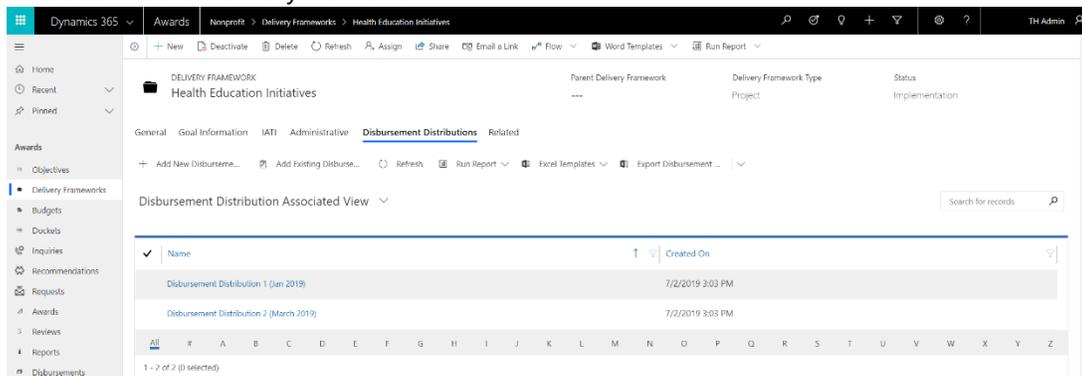
4. The Delivery Frameworks related to an Objective represent the initiatives or activities the nonprofit, or a third-party, will execute to achieve the Objective.. Select the **Health Education Initiatives** Delivery Framework:



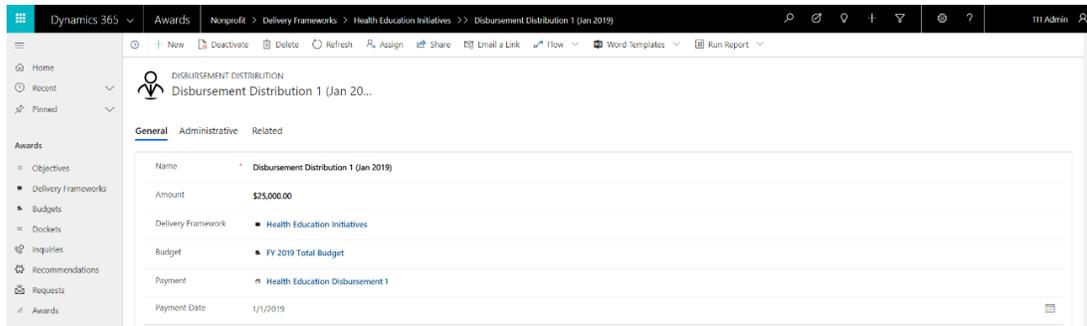
- View the **Health Education Initiatives** Delivery Framework. The purpose of this project is to work “with local partners throughout the region to develop training and education services around health in a community environment.” The record includes important scope, date, and status details for the Project (based on the Delivery Framework Type) which is in Implementation (based on the Status):



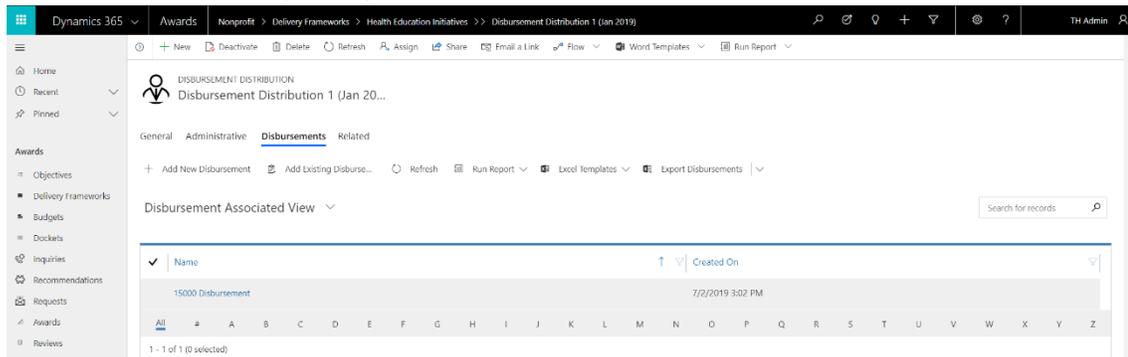
- View the **Related** Disbursement Distributions. Disbursement Distribution link Award Disbursements, or specific allocations of funds, from an Award Disbursement (aka “payment”) to the Delivery Framework. This link represents the funds that enable the activities that will be executed via the Delivery Framework.



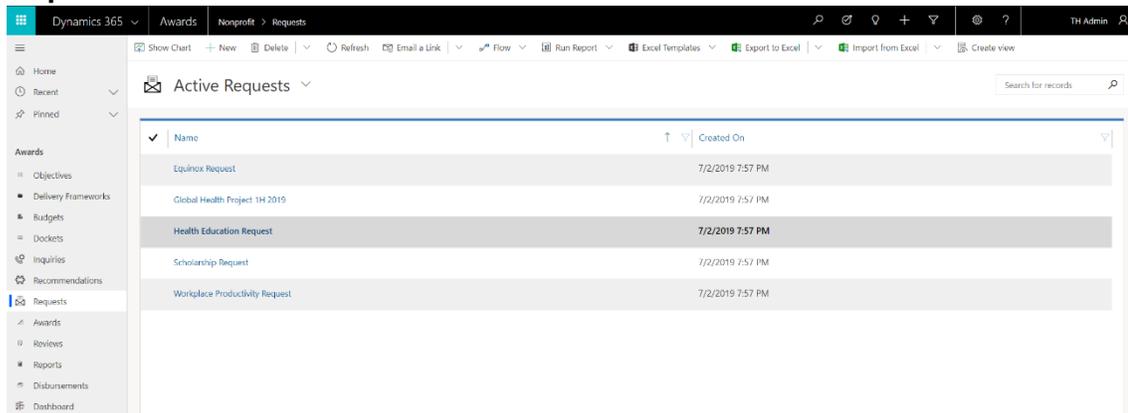
- Select the **Disbursement Distribution 1 (Jan 2019)** Disbursement Distribution. This is the first of two payments to fund the Delivery Framework “Health Education Initiatives”:



- View the related Disbursements, which represent the individual payments supporting the Delivery Framework. In this case, a **\$15,000 Disbursement** is recorded:



- Select **Requests** from the App Navigation to view Requests., Select the **Health Education Request**:



- The **Health Education Request** details the type, stage, requested and actual amounts, dates and duration, Docket, Recipient, Sponsor ,and other related information about the Request for support:

Field	Value
Name	Health Education Request
Submitted By	Bert Hair
Request Type	General
Submitted Date	11/21/2018
Purpose	Fund new projects
Initial Application Channel	CommChannel
Requirements	https://None
Lead	Cesar Haney
Requested Start Date	11/7/2018
Docket	Q1 Award Review Docket
Requested Duration	5
Recipient	Antunes Household
Fiscal Sponsor	Christoffersen Household
Amount Requested	\$50,000.00
Renewal of Award	Health Education
Amount Recommended	\$30,000.00
Conflict of Interest Detail	Employed member
Amount Projected	\$65,000.00
Conflict of Interest Status	Board Member
Total Project Budget	\$150,000.00
Application ID	7573754

11. If a Request is accepted, it will have an associated Award. Requests that are not accepted do not have associated Awards. In this case, the Health Education Request was accepted, and therefore has Stage of "Awarded," and is related to a **Health Education Award**. The Award record is the central point for all details related to the Award, including important dates, related Constituent records including the Recipient and Internal Contact and the Fiscal Sponsor. The Award is also related to Disbursements (as detailed above) which record one or more planned or actual payments related to the Award, Reports which represent reviews of the Award at a point in time and Award Versions which can be used to track changes in key Award details for compliance, regulatory or audit purposes.

Field	Value
Name	Health Education
Request	Health Education Request
Type	General Support
Docket	Global Health - FY2018
Recipient	Contoso, Ltd.
Internal Contact	Jill Acevedo
Notice of Award Date	11/13/2018
Notice Of Award Channel	CommChannel
Fiscal Sponsor	Galloway Household

12. The related Award Disbursements record one or more planned or actual payments related to the Award.. In this case, there are two payments:

Microsoft Nonprofit Accelerator Walkthrough



The screenshot shows the Dynamics 365 interface for a Nonprofit organization. The breadcrumb trail is: Dynamics 365 > Awards > Nonprofit > Awards > Health Education. The main content area is titled 'AWARD Health Education'. Below the title, there are tabs for 'General', 'Award Version', 'Disbursements', 'Reports', 'Administrative', and 'Related'. The 'Disbursements' tab is active, displaying a table with the following data:

Name	Amount	Created On
Health Education Disbursement 1	\$25,000.00	7/2/2019 3:02 PM
Health Education Disbursement 2	\$25,000.00	7/2/2019 3:02 PM

13. The related **Health Education Disbursement 1** record is the first Disbursement. This record includes the important detail of the payment, including but not limited to amount, currency, date, recipient, type and adjustment information, if necessary:

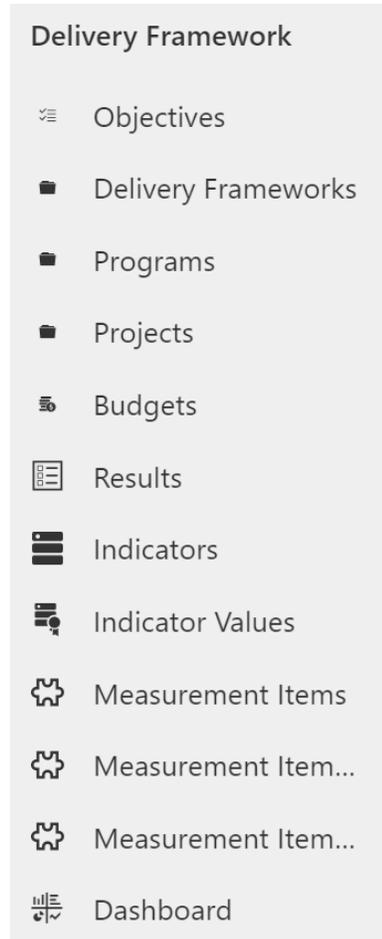
DISBURSEMENT		Health Education Disbursement 1	
Name	Health Education Disbursement 1	Recipient Contact	---
Adjustment Comment	---	Posted Date	1/1/2019
Adjustment Reason	---	Description	---
Adjustment Type	---	Type	Wire Transfer
Amount	\$25,000.00	Status	Paid
Currency	US Dollar	Sent Date	1/1/2019
Currency Value Date	1/1/2019	Scheduled Disbursement Date	1/1/2019
Award	Health Education	Request Date	---
Book Date	1/1/2019	Adjusts Original Transaction	---
Comment	---	Is Adjusted	No
Recipient Account	Contoso, Ltd.		

14. The related **Disbursement Distributions** link the Disbursement to one or more **Budgets** and/or **Delivery Frameworks**. This is the critical link between the Disbursement of funds from an Award and the Budgets allocated for the purpose of and/or the specific Delivery Frameworks, or activities, planned for accomplishing the nonprofit's Objectives.

DISBURSEMENT DISTRIBUTION		Disbursement Distribution 1 (Jan 2019)	
Name	Disbursement Distribution 1 (Jan 2019)		
Amount	\$25,000.00		
Delivery Framework	Health Education Initiatives		
Budget	FY 2019 Total Budget		
Payment	Health Education Disbursement 1		
Payment Date	1/1/2019		

Delivery Framework

The Nonprofit Accelerator includes the following components which enable end-to-end tracking of nonprofit program delivery activities:



Objectives

One or more high-level priorities for the nonprofit. For example: "End Poverty" or "Equitable Access to Education." Objectives can be structured into any hierarchy.

Delivery Frameworks

A unit of work via which a nonprofit, or third parties, achieves Objectives. Delivery Frameworks can be structured into any

hierarchy, i.e. a program with multiple projects and tasks.

Budgets

An allocation of funds to support achievement of Objectives.

Results

A container that represents the changes in the context in which an organization operates.

Indicators

Describes what will be measured to track evidence of a Result. Indicators can be qualitative or quantitative and may or may not be aggregable.

Indicator Values

A quantitative or qualitative value of measurement of an Indicator. Indicator Values may be but are not limited to baseline, target or actual values of measurement.

Measurement Items

Library used to store Goals, Objectives, Targets, Outcomes, Indicators, and other items for measurement.

Measurement Item Relationships

Records the details regarding the relationships between measurement items.

Measurement Item Usages

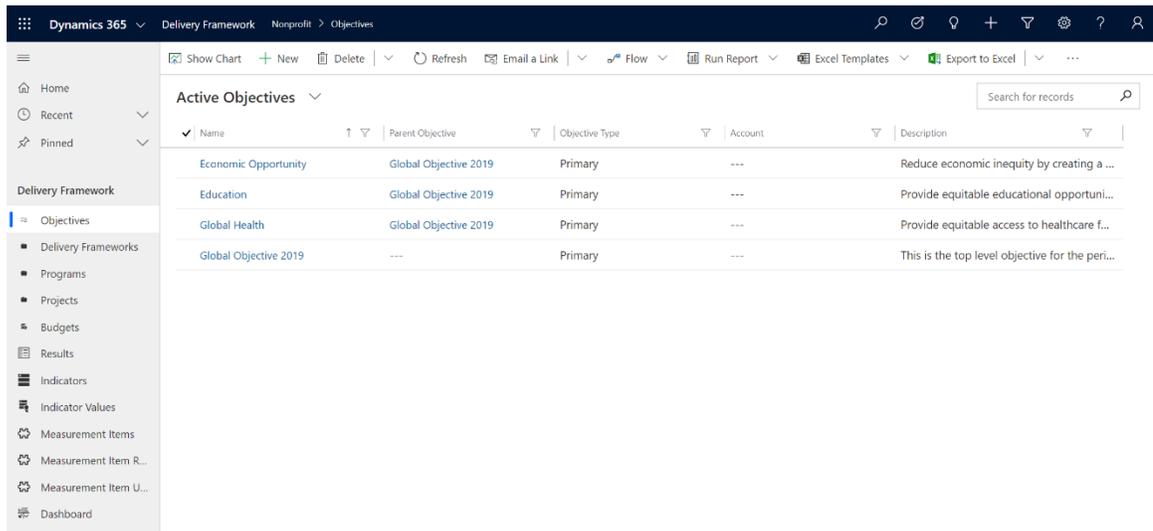
Used to track where measurement items have been used.

Benefit Recipients

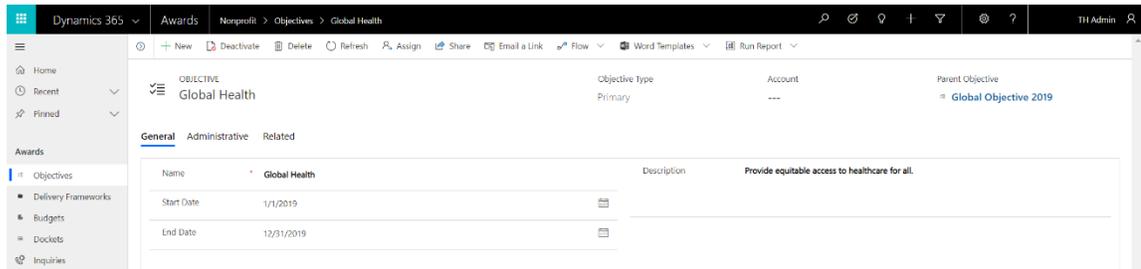
Any person or entity that is the recipient of the benefit of a nonprofit's activities.

Program Delivery

1. Navigate to the **Delivery Framework** Sample Application, view the **Objectives**:



2. Select the **Global Health** Objective. The nonprofit's objective is to "Provide equitable access to healthcare for all":



3. On the Global Health Objective, click on Related, then select **Delivery Frameworks**.

Microsoft Nonprofit Accelerator Walkthrough



Global Health
Objective

General Administrative Related

Name *	Related - Common <ul style="list-style-type: none">ActivitiesConnectionsAudit HistoryBudgetsMeasurement Item UsagesChild ObjectivesDelivery Frameworks
Start Date	
End Date	

- The Delivery Frameworks related to an Objective represent the activities the nonprofit, or a third-party, will execute to achieve the Objective.. Select the **Health Education Initiatives** Delivery Framework:

The screenshot shows the Dynamics 365 interface for the 'Global Health' Objective. The 'Delivery Frameworks' tab is selected, displaying a table of associated frameworks. The table has columns for Name, Account, Start Date, End Date, Scope, and Delivery Framework Type. The 'Health Education Initiatives' framework is highlighted.

Name	Account	Start Date	End Date	Scope	Delivery Framework Type
Health Education Initiatives	Contoso, Ltd.	1/1/2019	6/30/2019	National	Project
Health Initiatives: Focus USA	---	1/1/2019	---	---	Program
Osborne Project 1	---	7/1/2019	---	---	Project

- View the **Health Education Initiatives** Delivery Framework. The purpose of this project is to work “with local partners throughout the region to develop training and education services around health in a community environment.” The record includes important scope, date and status details:

The screenshot shows the detailed view of the 'Health Education Initiatives' Delivery Framework. The 'General' tab is selected, displaying various fields and sections.

Field	Value
Name	Health Education Initiatives
Account	Contoso, Ltd.
Region	---
Country	---
Scope	National
Planned Start Date	1/1/2019
Planned End Date	6/30/2019
Start Date	1/1/2019
End Date	6/30/2019
Objective	Global Health
Donor	---
Description	Working with local partners throughout the region to develop training and education

The 'Timeline' section shows 'No records to show.'

6. Select Related then **Measurement Item Usage**. This Measurement Item Usage record links the Measurement Item to the Delivery Framework. In this case, Health Education Initiatives is being measured by the ability to “Ensure healthy lives and promote well-being for all at all ages” (which also happens to be Goal 3 of the United Nations Sustainable Development Goals). NOTE: You may also choose to link this Measurement Item to Indicator Values for more specific measurements.

The screenshot shows the Dynamics 365 interface for 'Health Education Initiatives'. The 'Measurement Item Usage' tab is selected, displaying a table with the following data:

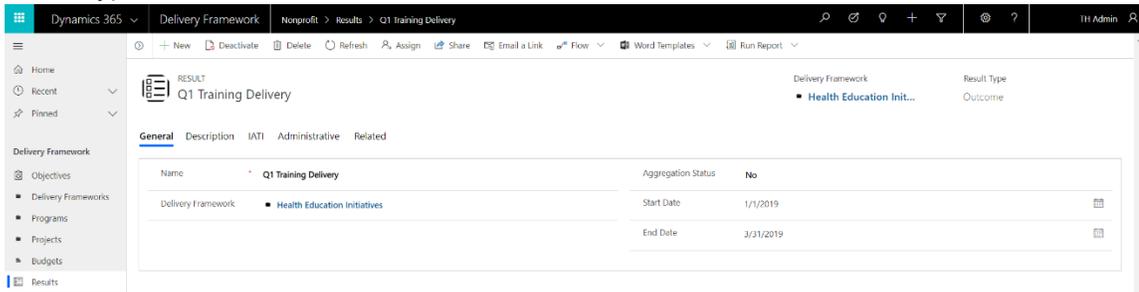
Name	Measurement Item	Delivery Framework	Result	Indicator	Objective
Ensure healthy lives and promote well-being for all at all ages	Ensure healthy lives and promote well-be	Health Education Initiatives	---	---	---

7. View the Results related to the Health Education Initiatives Delivery Framework project by selecting Related, then Results. elect the **Q1 Training Delivery Result**.

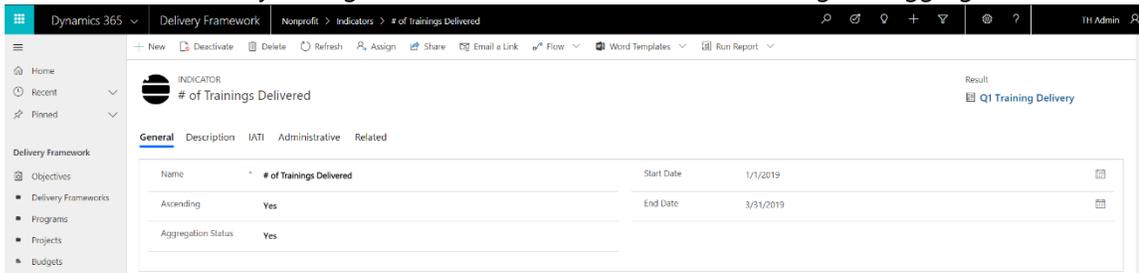
The screenshot shows the Dynamics 365 interface for 'Health Education Initiatives'. The 'Results' tab is selected, displaying a table with the following data:

Name	Created On
Q1 Training Delivery	10/30/2019 2:21 PM
Q2 Training Delivery	10/30/2019 2:21 PM

- The Result is a time-based (see start and end dates) summary of the intended Outputs, Outcomes and/or Impacts related to the Health Education Initiative Project. This key value is defined in the Result Type.



- Select **Related** then **Indicators** and select the **# of Trainings Delivered** Indicator. This Indicator defines what will be measured and/or monitored, for what period and whether the measurement is ascending and/or aggregable. In this case, the nonprofit will measure the number of trainings delivered from January through March 2019. The number is ascending and aggregable.



10. Select **Related** then **Indicator Values** and select the **1. Jan 19 Trainings** Indicator Value. This Indicator Value defines specifically what will be or has been measured and/or monitored. In this case, eight (8) trainings were delivered in January 2019. Note that Indicator Values can be structured hierarchically using the Parent Indicator Value attribute.

1. Jan 19 Trainings
Indicator Value

General | Description | Administrative | Related

Name	1. Jan 19 Trainings
Value Type	Actual
Amount	---
Number	8
Percentage	---

Start Date: 1/1/2019
End Date: 1/31/2019

11. Select Related then **Benefit Recipients**. The Benefit Recipient view details the specific Individuals that were trained during the month of January 2019. In this case, four Contacts and one Account are named.

1. Jan 19 Trainings
Indicator Value

Benefit Recipients | Related

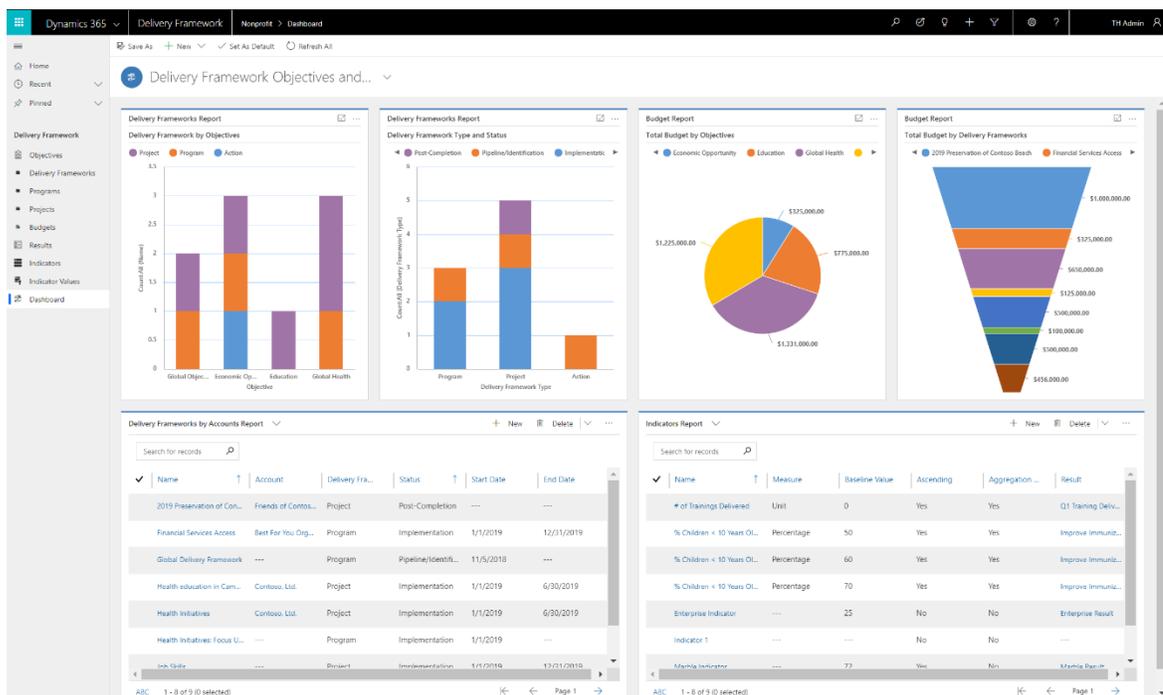
Benefit Recipient Associated View

Name	Description	Benefit Recipient...	Beneficiary	Resource Catalog	Parent Benefit R...	Created On
Celik Korkmaz	---	Contact	Celik Korkmaz	---	---	10/30/2019 2:20 PM
Clare Casey	---	Contact	Clare Casey	---	---	10/30/2019 2:20 PM
Contoso School	---	Account	Contoso School	---	---	10/30/2019 2:20 PM
Delia Schroeder	---	Contact	Delia Schroeder	---	---	10/30/2019 2:20 PM
Helena Wilcox	---	Contact	Helena Wilcox	---	---	10/30/2019 2:20 PM

1 - 5 of 5 (0 selected)

View Program Delivery Dashboard

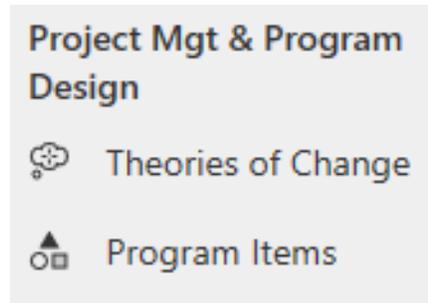
1. Navigate to the **Delivery Framework** Sample Application, select **Dashboard** in the left navigation. The sample **Delivery Framework Objectives and Results** dashboard displays several key insights:
 - a. Delivery Frameworks by Objective
 - b. Delivery Framework by Type and Status
 - c. Total Budget by Objective
 - d. Total Budget by Delivery Framework
 - e. A list of Delivery Frameworks by Account
 - f. A list of Indicators



2. An additional sample dashboard **Delivery Framework by Budget** is also available in the sample application.

Project Management and Program Design

The Nonprofit Accelerator has a Project Management and Program Design application that can be added on to core functionality. This section outlines some of the functionality that this add-on solution provides.



Theories of Change

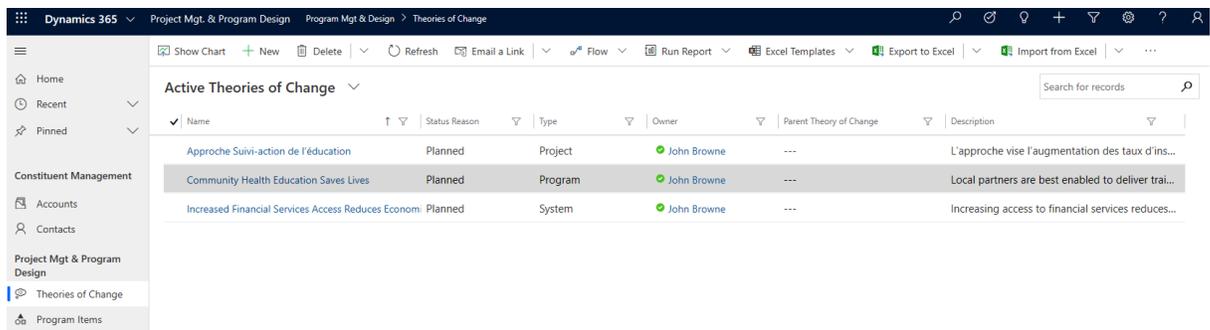
Theories of Change are hypotheses for achieving a desired social impact and are comprised of a sequence of cause-and-effect actions or occurrences.

Program Items

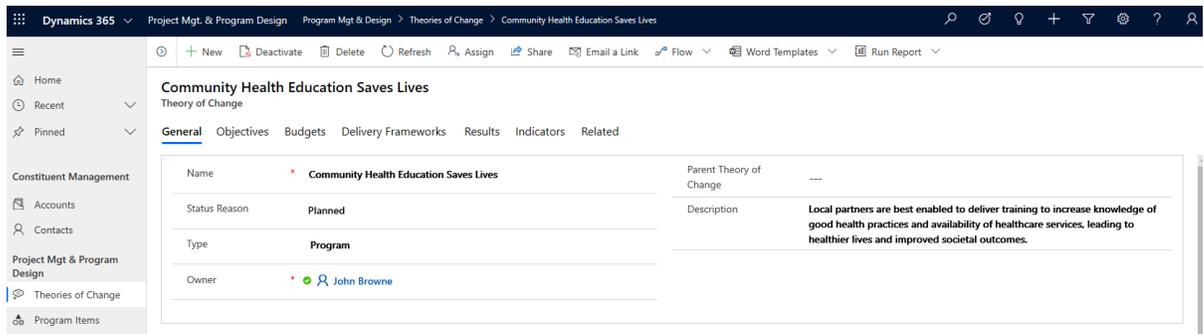
Program Items detail the program elements that contribute to proving or disproving a Theory of Change such as assumptions, deliverables, decisions, milestones, obligations, observations, or risks.

Sample Theory of Change

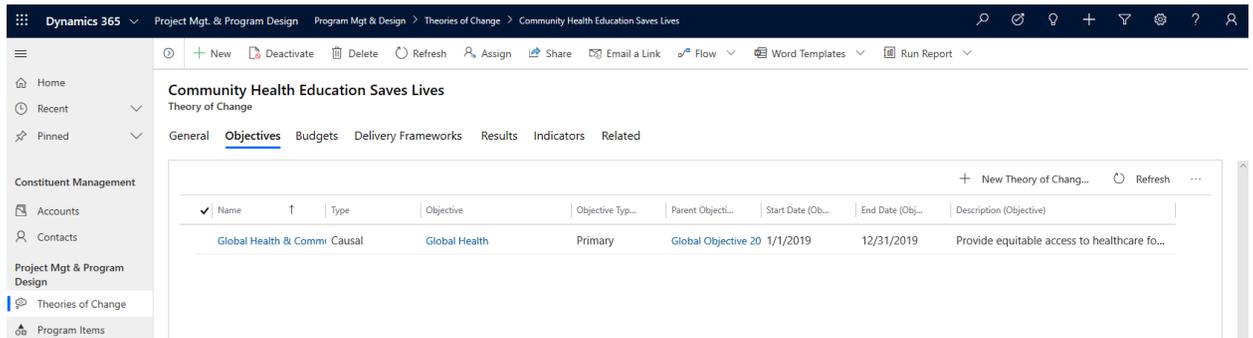
1. Navigate to the **Project Management and Program Design** solution, and view the **Theories of Change**:



2. Select the **Community Health Education Saves Lives** Theory of Change, which corresponds to a planned program (denoted by the Status Reason and Type), and is summarized in the description that "Local partners are best enabled to deliver training to increase knowledge of good health practices and availability of healthcare services, leading to healthier lives and improved societal outcomes."



3. Take note of the tabs across the top of the Theory of Change record. Each of these tabs displays the Program Design records (i.e., Objectives, Budgets, Delivery Frameworks, Results and Indicators) which document the plan required to prove or disprove the Theory of Change. Click the **Objectives** tab and take note of the Type field, which indicates a Causal relationship between the Theory of Change and this Objective.



4. Return to the **General** tab and observe the **Program Items** section at the bottom of the page. This section lists all the Program Items which contribute to proving or disproving this Theory of Change.

Dynamics 365 | Project Mgt. & Program Design | Program Mgt & Design | Theories of Change | Community Health Education Saves Lives

[New](#) | [Deactivate](#) | [Delete](#) | [Refresh](#) | [Assign](#) | [Share](#) | [Email a Link](#) | [Flow](#) | [Word Templates](#) | [Run Report](#)

Community Health Education Saves Lives

Theory of Change

[General](#) | [Objectives](#) | [Budgets](#) | [Delivery Frameworks](#) | [Results](#) | [Indicators](#) | [Related](#)

Name	Community Health Education Saves Lives	Parent Theory of Change	---
Status Reason	Planned	Description	Local partners are best enabled to deliver training to increase knowledge of good health practices and availability of healthcare services, leading to healthier lives and improved societal outcomes.
Type	Program		
Owner	John Browne		

Program Items

[+ New Program Item](#) | [Add Existing Program ...](#) | [...](#)

Name	Rating	Type	SubType	Obligation Ty...	Date Fulfilled	Observation ...	Due	
Attendees include individuals and education gn	Medium	Observation	---	Execution	1/15/2019	---	---	Refresh
Ensure all trainers are local to context of trainin	High	Decision	Resource	Monitoring	1/25/2019	---	---	Run Report
Lack of attendee confirmation pre-sessions dec	Medium	Risk	---	---	---	---	---	Excel Templates
Local trainer with existing relationship improves	High	Observation	Resource	Execution	1/24/2019	Delivery Fram...	---	Export Program Items

1 - 4 of 14 (0 selected)

Page 1

- Click the ellipsis to the right of 'Add Existing Program...' in the Program Items section and select **'See all records.'** In this view, all 14 related Program Items are displayed. Take note of the Type field, where there are six Status Reports, two Quarterly Reports as well as several other Types of Program Items.

Name	Rating	Type	SubType	Obligation Ty...	Date Fulfilled	Observation...	Due Date	Status Reason	Start Date	
Attendees include individuals and education gn	Medium	Observation	---	Execution	1/15/2019	---	---	Planned	---	-
Ensure all trainers are local to context of trainin	High	Decision	Resource	Monitoring	1/25/2019	---	---	Planned	---	-
Lack of attendee confirmation pre-sessions dec	Medium	Risk	---	---	---	---	---	Planned	---	-
Local trainer with existing relationship improves	High	Observation	Resource	Execution	1/24/2019	Delivery Fram...	---	Planned	---	-
Quarterly Report (Q1) Due to Contoso, Ltd. 201	High	Obligation	---	Execution	4/15/2019	---	4/15/2019	Planned	3/15/2019	4
Quarterly Report (Q2) Due to Contoso, Ltd. 201	High	Deliverable	---	Execution	7/15/2019	---	7/15/2019	Planned	6/15/2019	7
Status Report 1 - 2019/01	Low	Deliverable	---	Monitoring	2/15/2019	---	2/15/2019	Planned	1/15/2019	2
Status Report 2 - 2019/02	Low	Deliverable	---	Monitoring	3/15/2019	---	3/15/2019	Planned	2/15/2019	3
Status Report 3 - 2019/03	Low	Deliverable	---	Monitoring	4/15/2019	---	4/15/2019	Planned	3/15/2019	4
Status Report 4 - 2019/04	Low	Deliverable	---	Monitoring	5/15/2019	---	5/15/2019	Planned	4/15/2019	5
Status Report 5 - 2019/05	Low	Deliverable	---	Monitoring	6/15/2019	---	6/15/2019	Planned	5/15/2019	6
Status Report 6 - 2019/06	Low	Deliverable	---	Monitoring	7/15/2019	---	7/15/2019	Planned	6/15/2019	7
Training participant gender must be at least 50%	High	Obligation	---	Monitoring	6/30/2019	---	6/30/2019	Planned	1/1/2019	6
Translation of local content to local context res	High	Assumption	---	Execution	1/24/2019	---	---	Planned	---	-

- Per the Type column, there is one risk to the project: the "Lack of attendee confirmations pre-sessions decreases participation." Click on the record.

Lack of attendee confirmation pre-sessions decreases participation
Program Item

Community Health Education Saves Lives
Theory of Change

General Program Items Objectives Budgets Delivery Frameworks Results Indicators Related

Name	Lack of attendee confirmation pre-se	Type	Risk	Due Date	---
Status Reason	Planned	SubType	---	Date Fulfilled	---
Rating	Medium	Obligation Type	---	Description	---
Start Date	---	Observation Type	---		
End Date	---				
Owner	John Browne				

Stakeholders

Name	Status Reason	Type	Stakeholder Name	Start Date	End Date	Created On
No data available.						

- There are a number of data points and tabs displayed. As with a Theory of Change, the tabs across the top show all Program Design records related to this Program Item, including other Program Items. Click the **Program Items** tab.
- The Risk, "Lack of attendee confirmations pre-sessions decreases participation" was cause for trying to "Determine how to increase attendance" (listed in the Name column). There is an Observation that "Local trainer with existing relationship improves attendance and participation."

The screenshot shows the Dynamics 365 interface for a Program Item. The main title is "Lack of attendee confirmation pre-sessions decreases participation". The "Program Items" tab is selected, displaying a table with the following data:

Name	Type	Related To Program Item	Status Reason	Rating	Type	SubType	Obligation Type	Observation Ty
Determine how to increa	Causal	Local trainer with existing relatio	Planned	High	Observation	Resource	Execution	Delivery Frame...

- Given a Rating of High, it is clear that having local trainers resulted in better participation and may help to mitigate the Risk previously observed.

The screenshot shows the Dynamics 365 interface for a Program Item. The main title is "Local trainer with existing relationship improves attendance and participation". The "General" tab is selected, displaying a table with the following data:

Name	Local trainer with existing relationship	Type	Observation	Due Date	---
Status Reason	Planned	SubType	Resource	Date Fulfilled	1/24/2019
Rating	High	Obligation Type	Execution	Description	---
Start Date	---	Observation Type	Delivery Framework		
End Date	---				
Owner	John Browne				

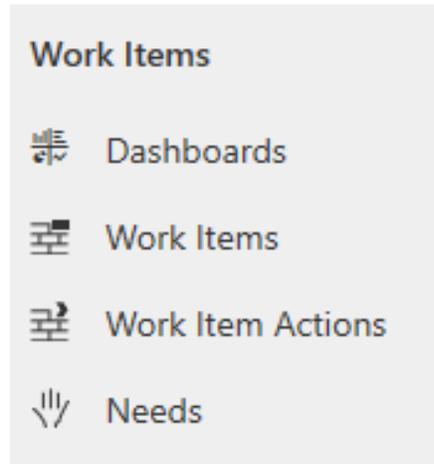
- To view a chain of all Program Items related to “Local trainer with existing relationship improves attendance and participation,” click the **Program Items** tab. The bottom grid shows that the Risk “Lack of attendee confirmation pre-sessions decreases participation” caused program personnel to make the current Observation that, “Local trainer with existing relationship improves attendance and participation”. This in turn caused the Decision to “Ensure all trainers are local to context of training venue.” This models how the app can be used to track complex causal and other relationships across the multitude of Program Design and Project Management records.

The screenshot shows the Dynamics 365 interface for a Program Item. The breadcrumb trail is: Dynamics 365 > Project Mgt. & Program Design > Program Mgt & Design > Program Items > Local trainer with existing relationship improv... The main title is "Local trainer with existing relationship improves attendance and participation" (Program Item). The "Program Items" tab is selected, showing a grid of related items. The grid has columns: Name, Type, Related To Program Item, Status Reason (...), Rating (Related...), Type (Related T..., SubType (Relat..., Obligation Typ..., and Observation Ty... The grid contains two rows of data:

Name	Type	Related To Program Item	Status Reason (...)	Rating (Related...)	Type (Related T...	SubType (Relat...	Obligation Typ...	Observation Ty...
Local trainers lead to inc	Causal	Ensure all trainers are local to co	Planned	High	Decision	Resource	Monitoring	---
Determine how to increase	Causal	Lack of attendee confirmation pre-	Planned	Medium	Risk	---	---	---

Case Management

The Nonprofit Accelerator has a Case Management solution that can be added to provide basic case management functionality. This section outlines some of the functionality that this add-on solution provides.



Dashboards

This will show a basic dashboard with various data points on current Work Items and Work Item Actions.

Work Items

Work Items are the root units of work in the Nonprofit Accelerator's case management solution and can be used independent of or in conjunction with Work Item Actions, Needs and Indicators.

Work Item Actions

Work Item Actions are units of work that are assigned and tracked under a Work Item.

Needs

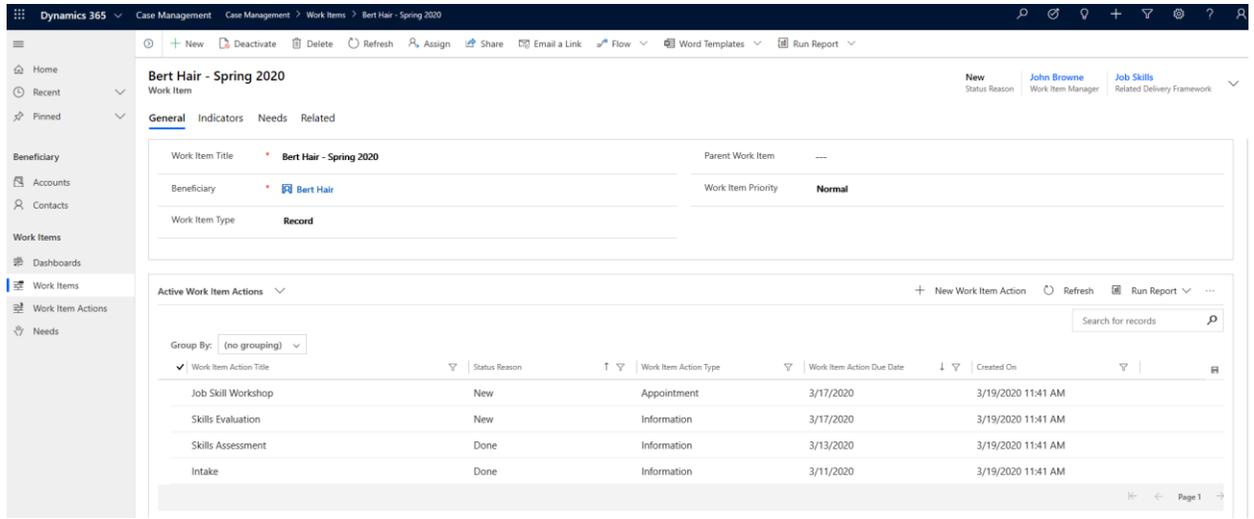
Needs provide a method of tracking a beneficiary's needs, and case work that has been done to address those needs.

Sample Work Item

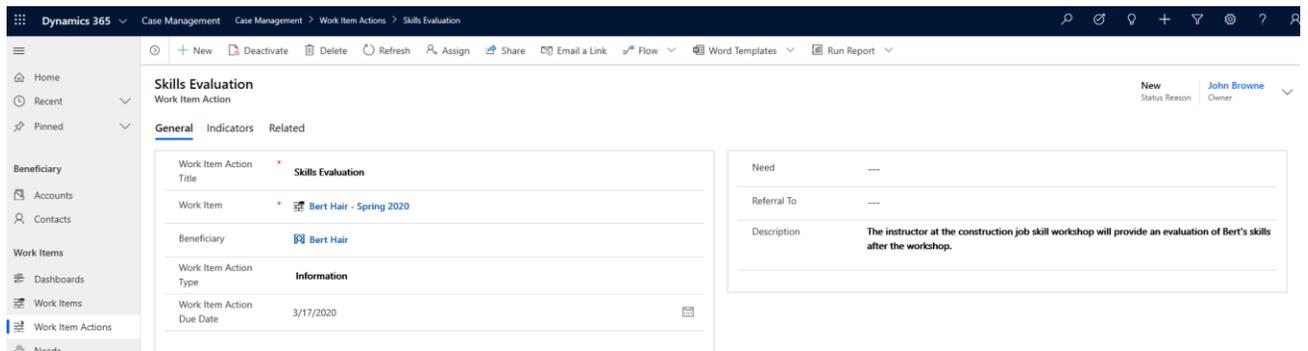
1. Navigate to the **Case Management** Sample Application, and view the **Work Items**:

Work Item Title	Work Item Manager	Status Reason	Work Item Type	Beneficiary	Parent Work Item	Work Item Priority	Created On
Adventure Works Small Business Loan Application	John Browne	Assessment	Record	Adventure Works Cycles	---	Normal	3/19/2020 11:41 AM
Bert Hair - Spring 2020	John Browne	New	Record	Bert Hair	---	Normal	3/19/2020 11:41 AM
Galloway Food Pickup	John Browne	Done	Service Case	Galloway Household	---	Normal	3/19/2020 11:41 AM
Potter Family Application for Adoption	John Browne	Intake	Service Case	Tricia Potter	---	Normal	3/19/2020 11:41 AM
Ulmer's Case File	John Browne	New	Record	Stuart Ulmer	---	Normal	3/19/2020 11:41 AM

2. Click and open the **Bert Hair – Spring 2020** Work Item. This screen displays an overview of all activity related to working with the Beneficiary **Bert Hair**, as it pertains to this case. At the top right of the screen, there are three important fields:
 - 1) Status Reason shows the work item is **New**
 - 2) The Work Item Manager and person responsible for the work item is **John Browne**
 - 3) This work item is related to a Delivery Framework **Job Skills**

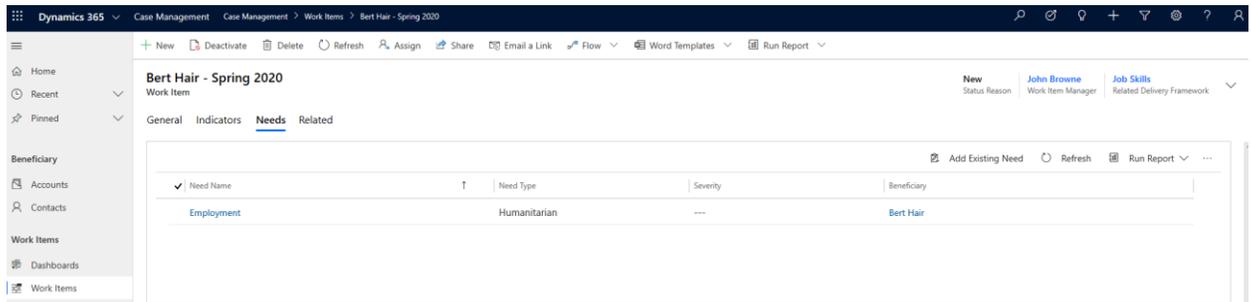


3. Scroll to the bottom of the page to see a list of all the Work Item Actions related to Bert's record. It seems Bert has completed his Intake and Skills Assessment and is scheduled to attend a Job Skill Workshop and have a Skills Evaluation, but both on the same day. That seems odd.
4. Double click on the **Skills Evaluation** line item. This screen shows details for the Skills Evaluation. The Description field indicates that the Jobs Skills Workshop and Skills Evaluation are part of the same event, which provides insight as to why these two events are scheduled at the same time.

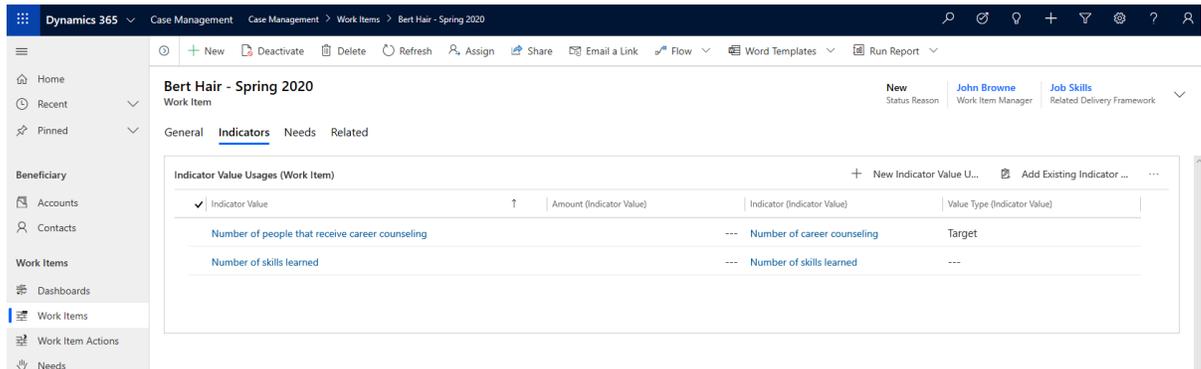


5. Return to the Work Item by clicking on the blue work item text **Bert Hair – Spring 2020**.

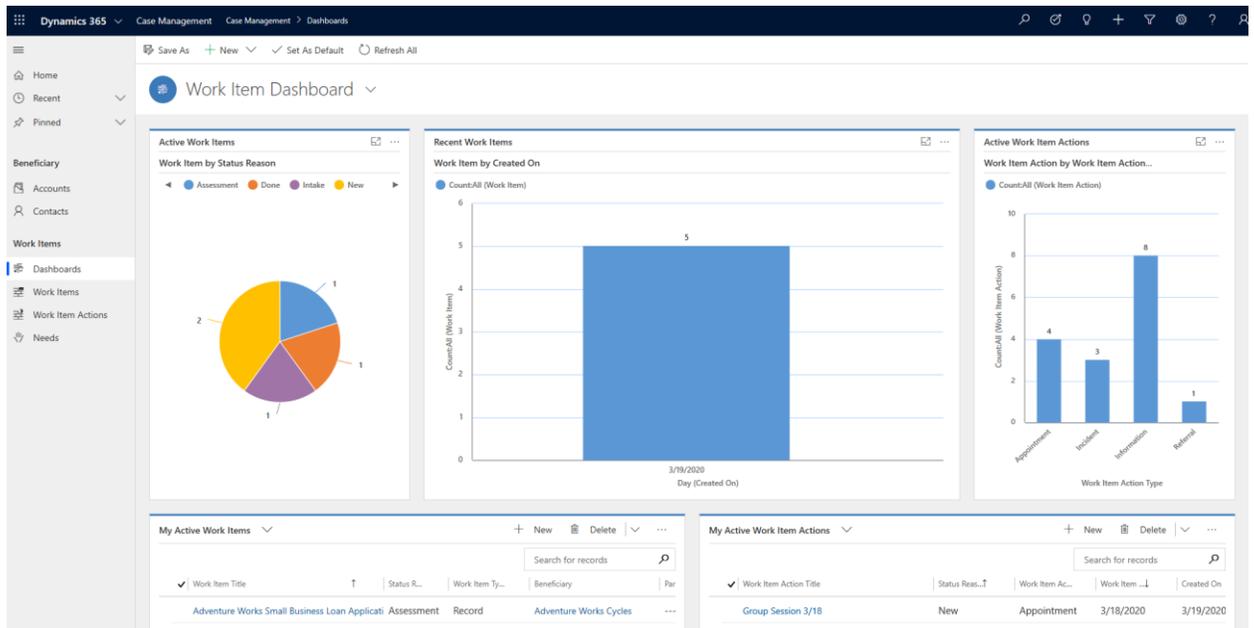
- To find out why Bert is in the system, click the **Needs** tab. Here, Bert's need for **Employment** is recorded.



- Click the **Indicators** tab to see how success on this case will be measured. Two indicators are listing that indicators for this case will be based on **Number of People that Receive Career Counseling** and **Number of skills learned**.

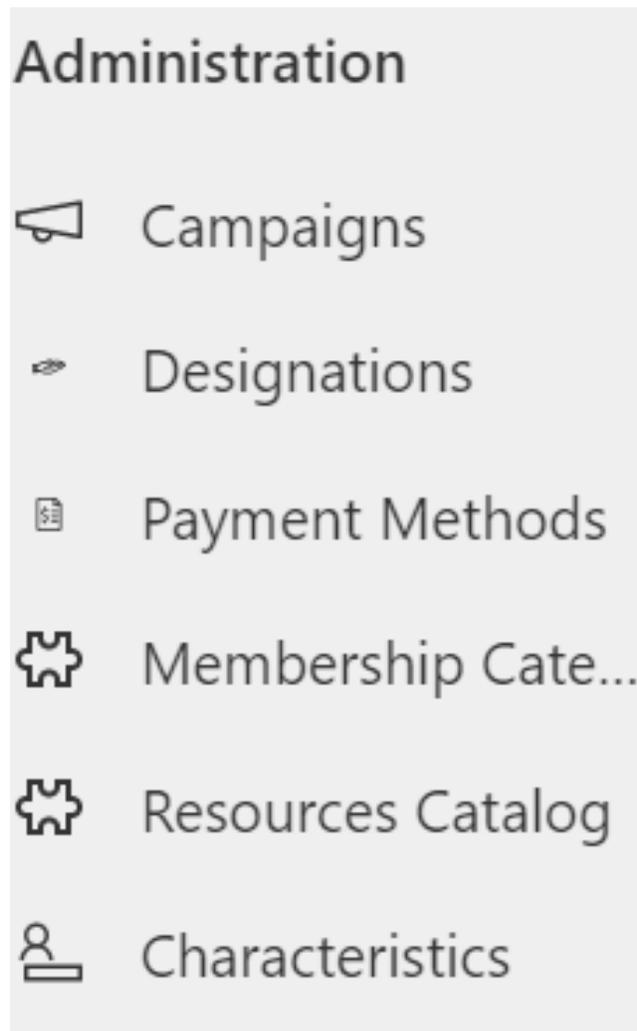


- In the left navigation, click **Dashboards** to view the Dashboard showing all the Active Work Items by Status Reason, Recent Work Items and Work Item Action by type.



Administration

The Nonprofit Accelerator includes an Administration sample application that includes key nonprofit accelerator components that are generally reserved for application administrators or super users. It includes the following components:



Campaigns

Container for constituent engagement activities and responses and lists to create, plan, execute, and track the results of a specific marketing campaign through its life.

Designations

An area to which funds may be allocated, including a GL-relevant accounting code. Designations are the way a donor instructs the nonprofit to direct their donation.

Payment Methods

Payment Method is a placeholder entity for payment method customizations that may be supported by partner or custom applications.

Membership Categories

Represents the types of membership associated to products.

Resources Catalog

Catalog that contains beneficiaries that are not contacts/accounts.

Characteristics

Skills, education and certifications of resources. Only available with Volunteer Management.