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:

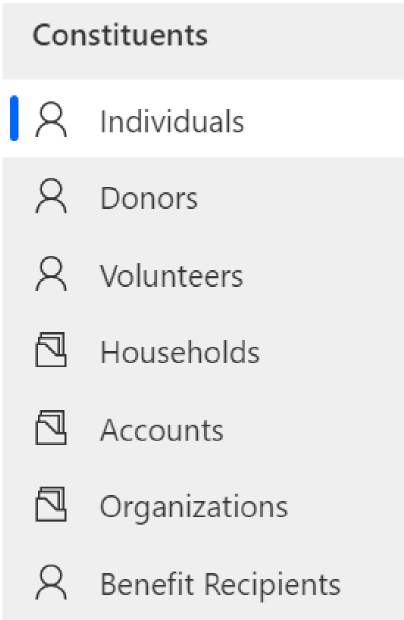
1. **Fundraiser:** The Fundraiser will use the system to facilitate constituent management and execute fundraising.
2. **Award Manager:** The Award Manager will use the solution to facilitate constituent management and manage awards.
3. **Program Manager:** The Program Manager will use the solution to 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:



Individuals

Any person with whom a nonprofit has a relationship. The person may be a donor, volunteer, advocate, member, etc. Individuals are Contacts.

Households

Any family or partner grouping of people with which a nonprofit has a relationship. Households are Accounts.

Accounts

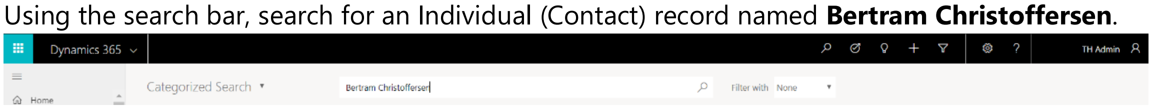
Any organization with which a nonprofit has a relationship. The entity may be a corporation, foundation, etc. Organizations are Accounts.

Benefit Recipients

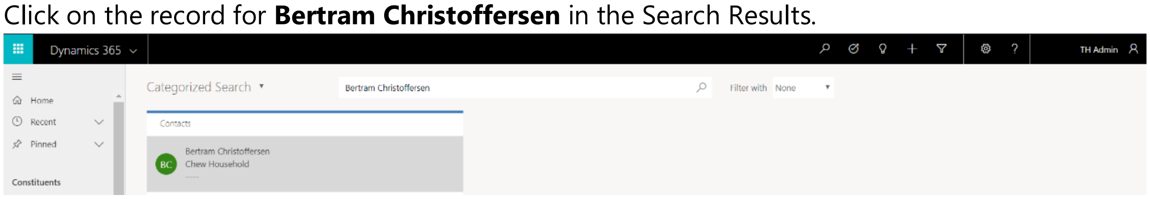
Any person or entity that is the recipient of the benefit of a nonprofit's activities.

View Individual

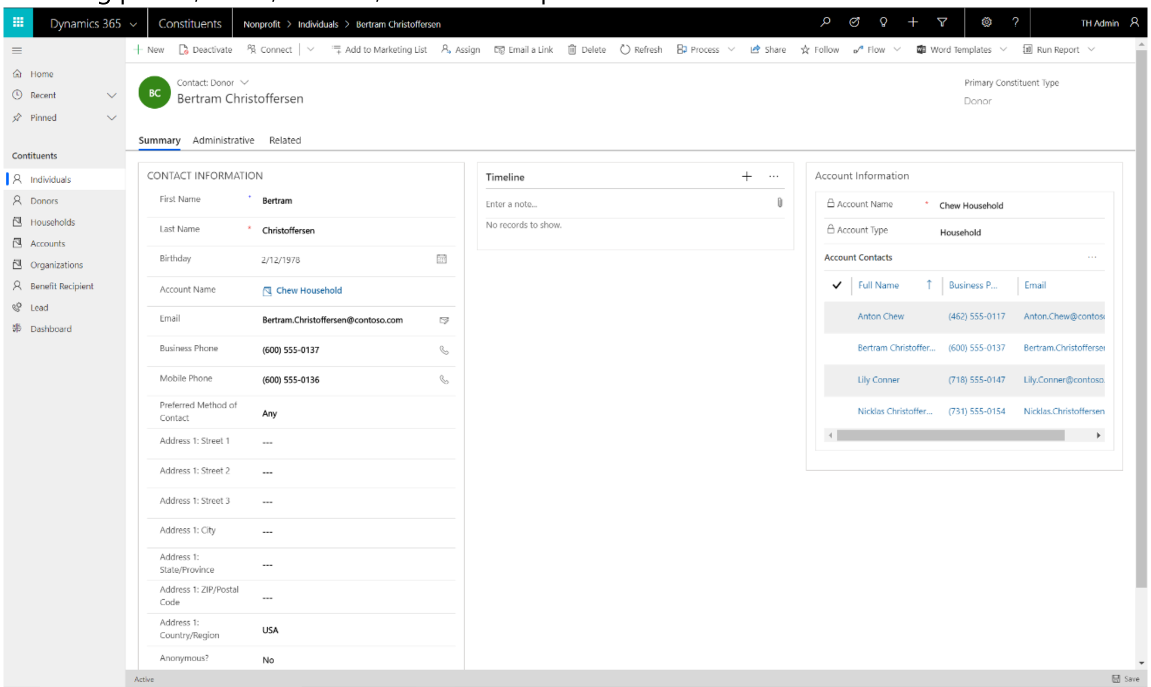
1. Using the search bar, search for an Individual (Contact) record named **Bertram Christoffersen**.



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.



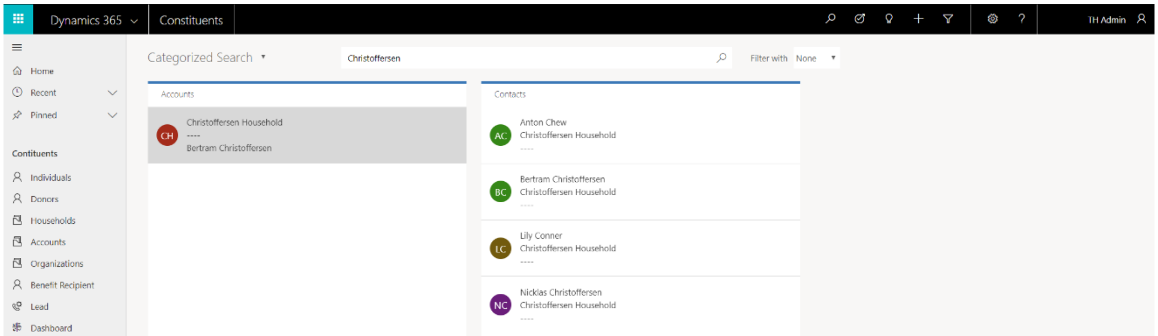
4. Bertram's Household Information is available on the right side of the profile. Bertram is a member of the Chew Household, along with three other individual Contacts (Anton Chew, Lily Conner and Niklas Christoffersen).

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

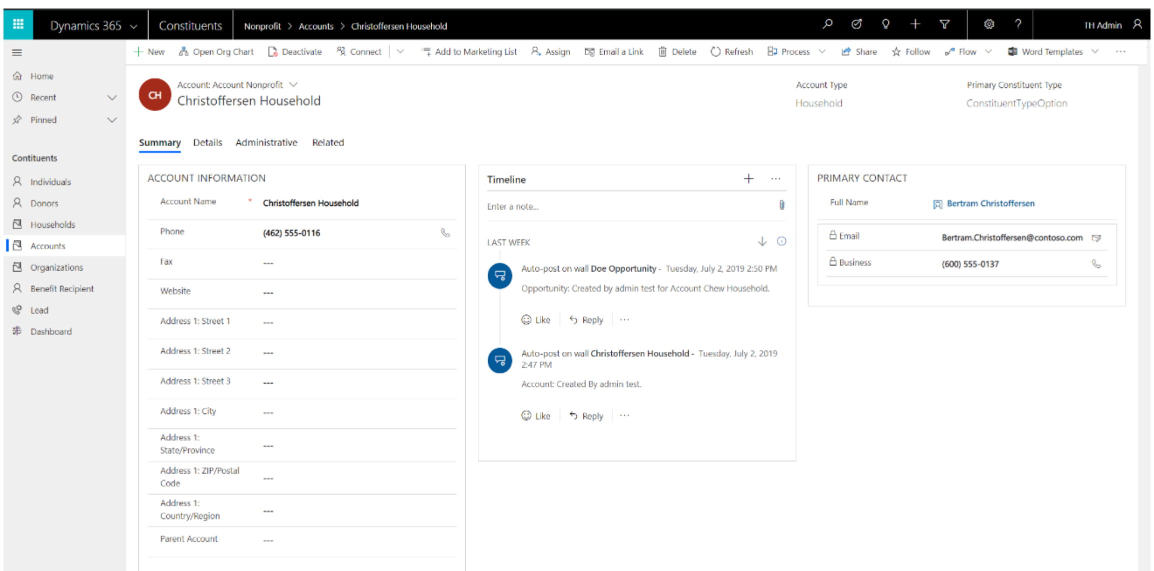
View Household

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

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



3. 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.

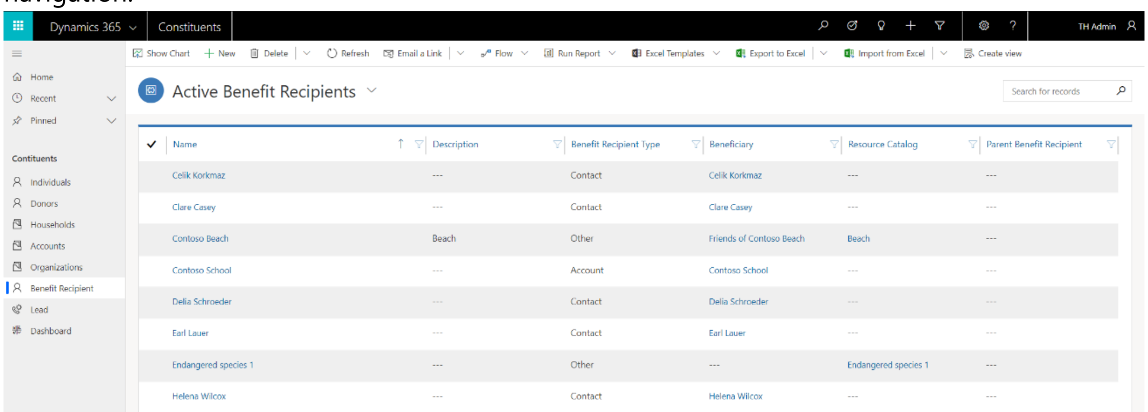


4. Household profiles include the following components, enabling complete profiling of Household Constituents (available via **Related**):
    a. Contacts – any number of Individual Contacts included in the Household
    b. Addresses – any number of addresses
    c. Connections – any number of relationships to other Individuals 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

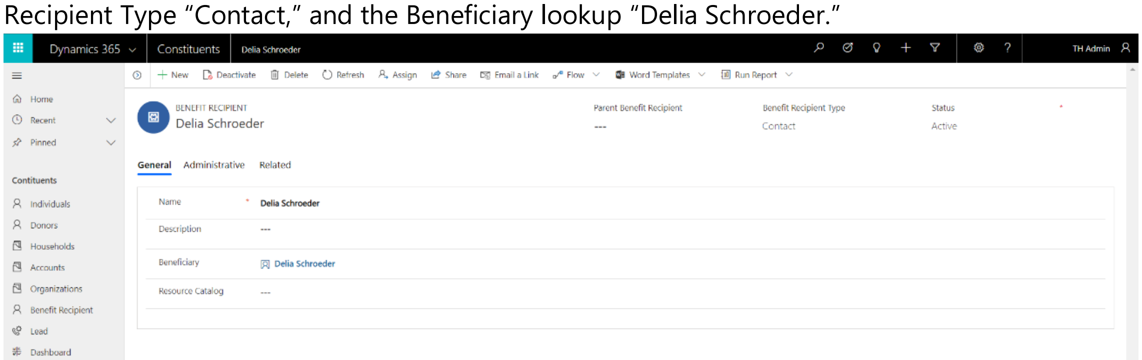
View Benefit Recipient

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.

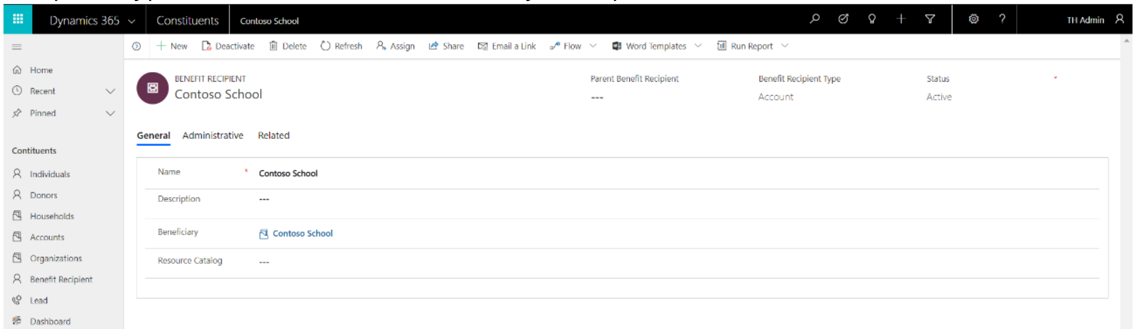


3. This view provides several examples of Contact, Account and Other Benefit Recipients. Other is a placeholder value that represents Benefit Recipients that are neither Accounts nor Contacts and can be updated to meet customer requirements.

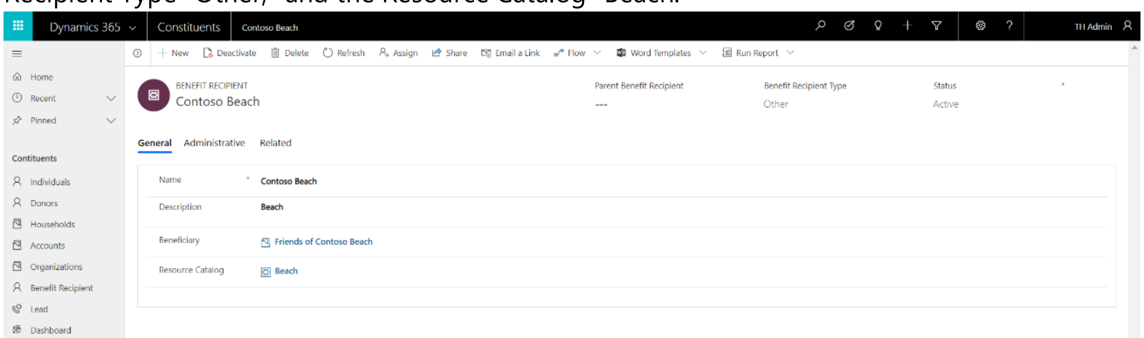
4. Select the **Delia Schroeder** Benefit Recipient. This record is a Contact, as defined by the Benefit Recipient Type "Contact," and the Beneficiary lookup "Delia Schroeder."



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.”

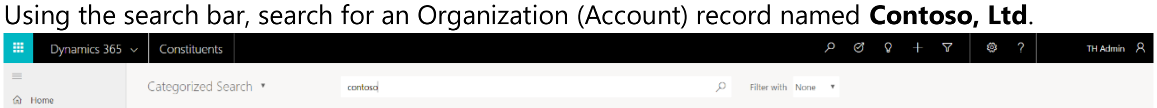


6. Select the **Contoso Beach** Benefit Recipient. This record is a beach, as defined by the Benefit Recipient Type “Other,” and the Resource Catalog “Beach.”

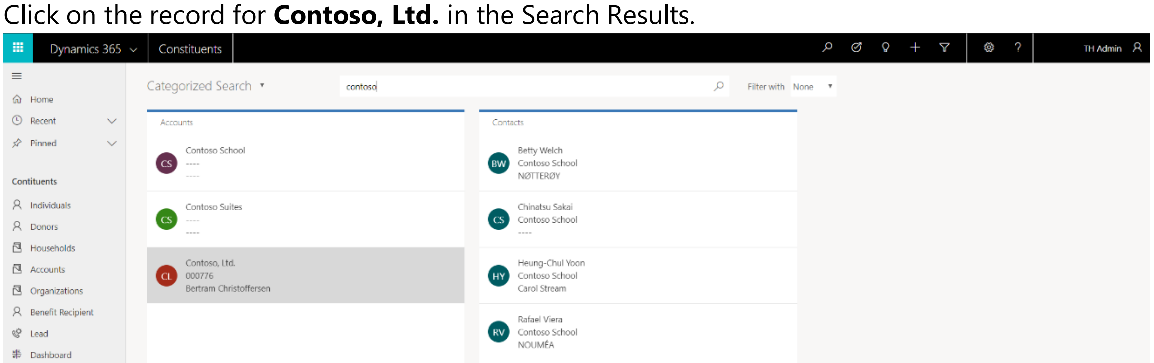


View Organization

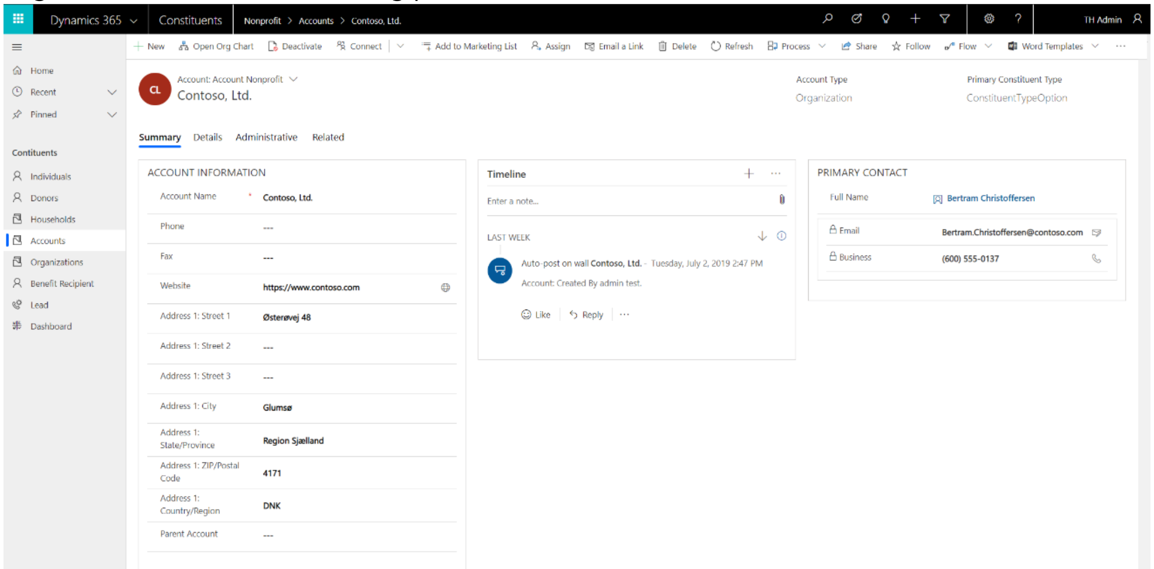
1. Using the search bar, search for an Organization (Account) record named **Contoso, Ltd**.



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



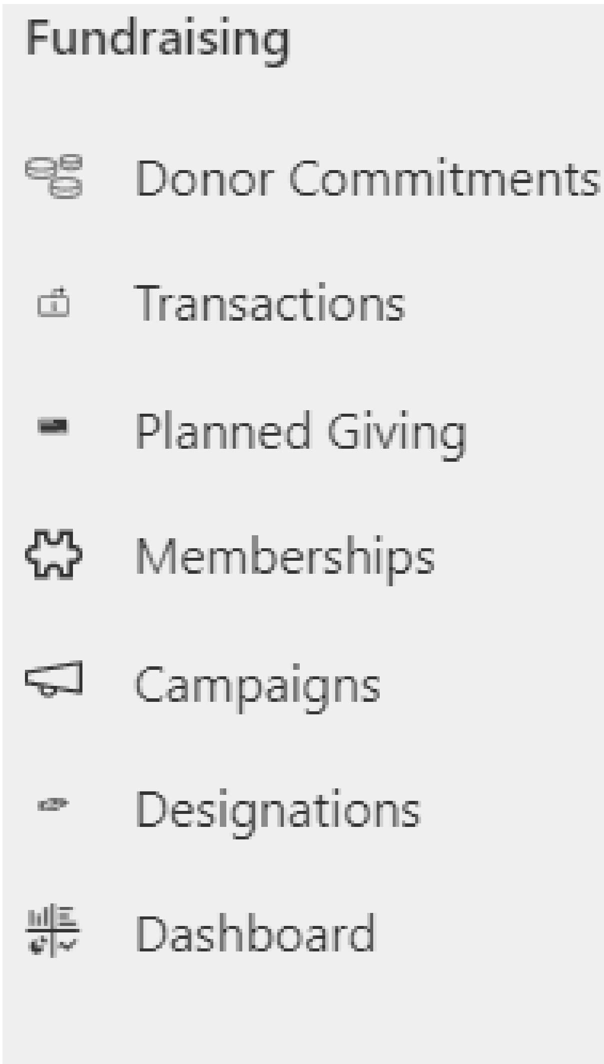
3. View the Organization Profile Page for **Contoso, Ltd.** This Organization has a Primary Contact, Bertram Christoffersen, as identified by the Primary Contact. Profile information about the Organization is available including phone, email, website and address details.



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

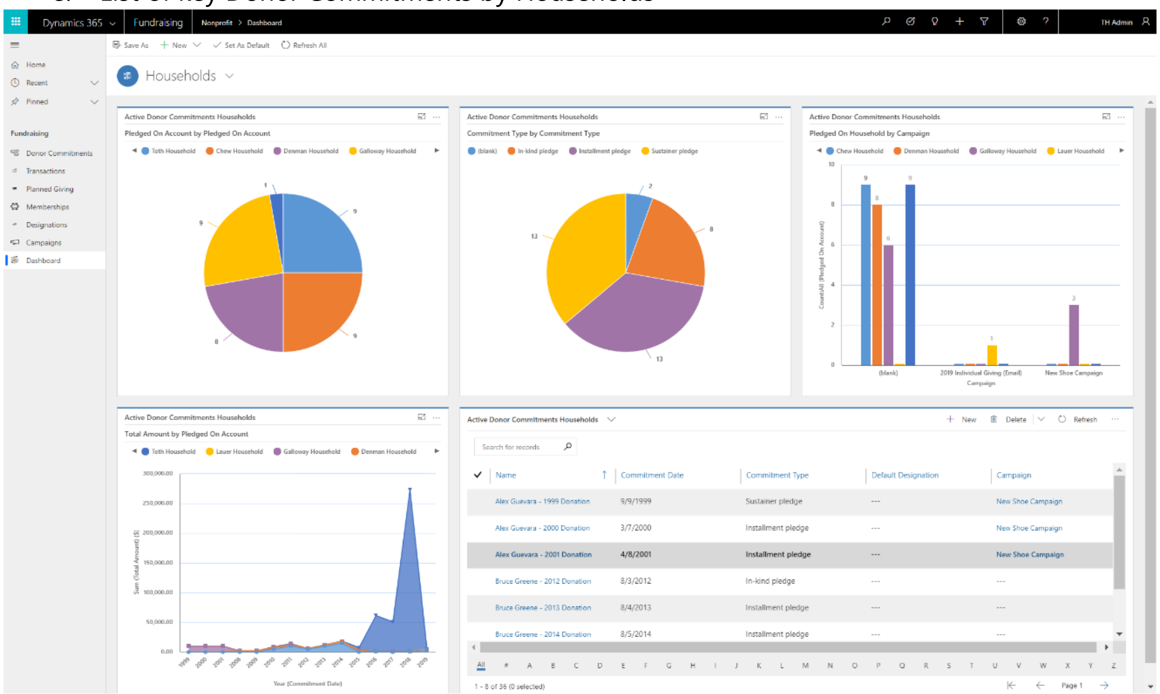
Container for constituent engagement activities and responses and lists to create, plan, execute, and track the results of a specific marketing campaign through its life.

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.

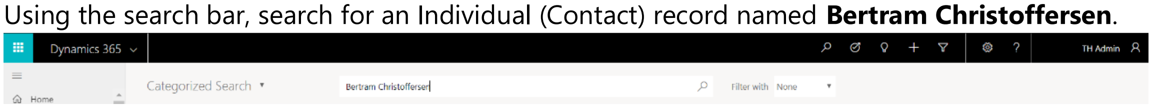
View Fundraising Dashboard

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



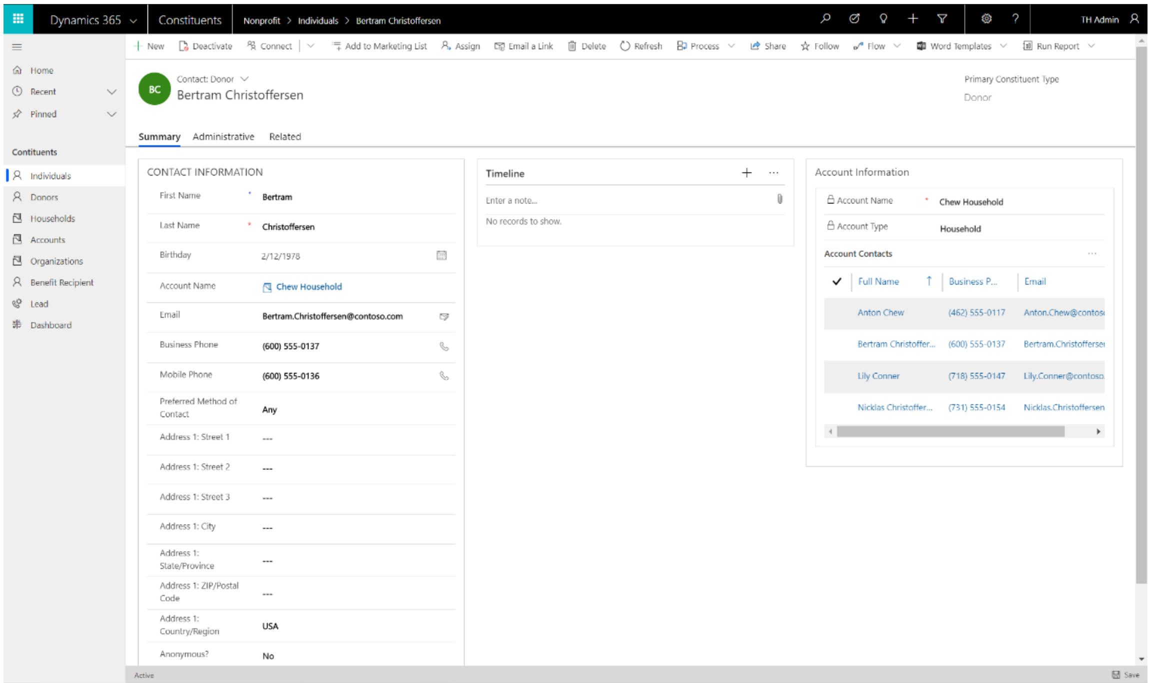
View Donor Commitment

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

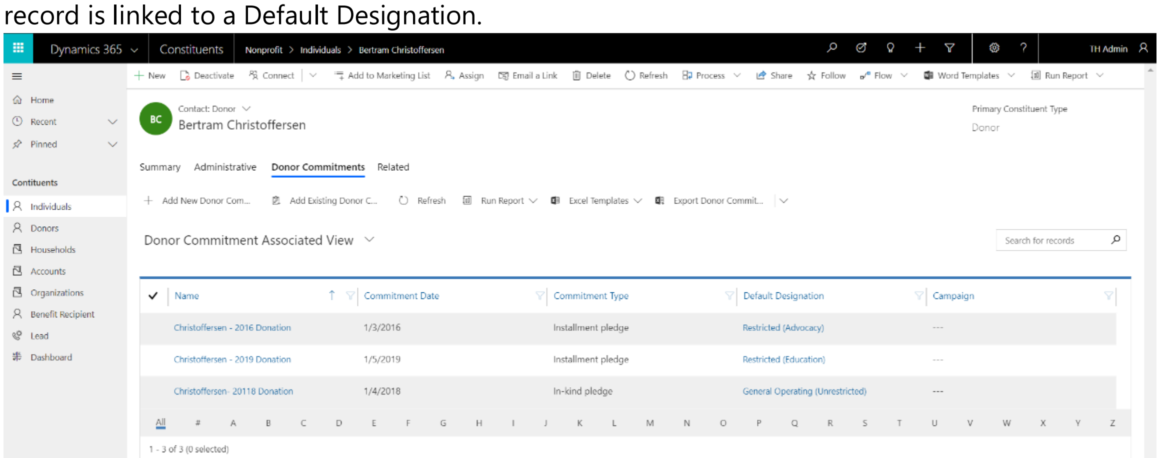


2. Click on the record for **Bertram Christoffersen** in the Search Results.

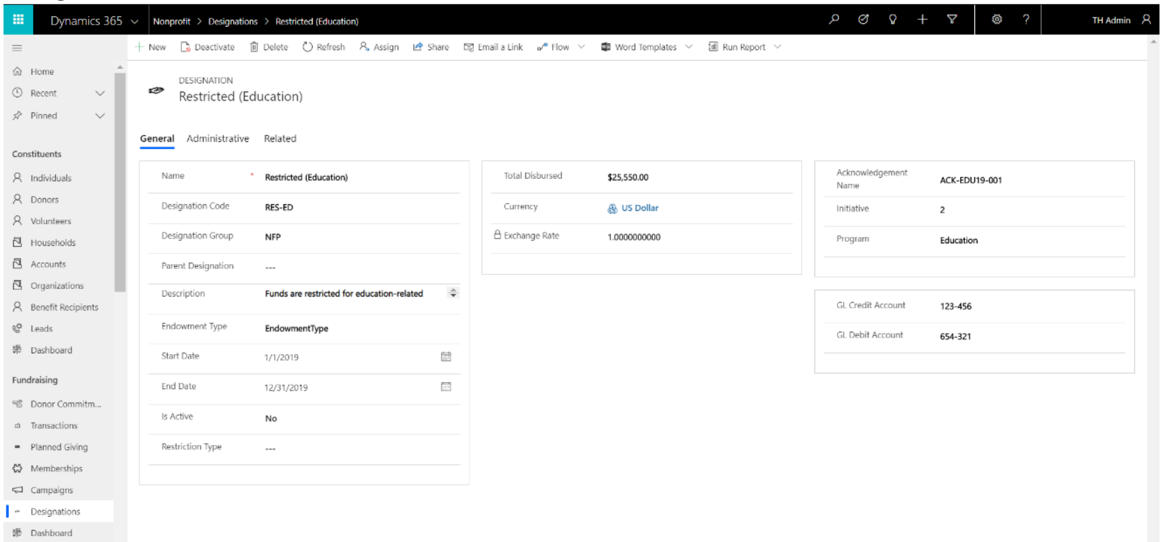
3. View the Individual Profile Page for **Bertram Christoffersen**. This Individual is a Donor, as identified by the Primary Constituent Type value "Donor." Profile information about the constituent is available including phone, email, address, account and preferred contact method details.



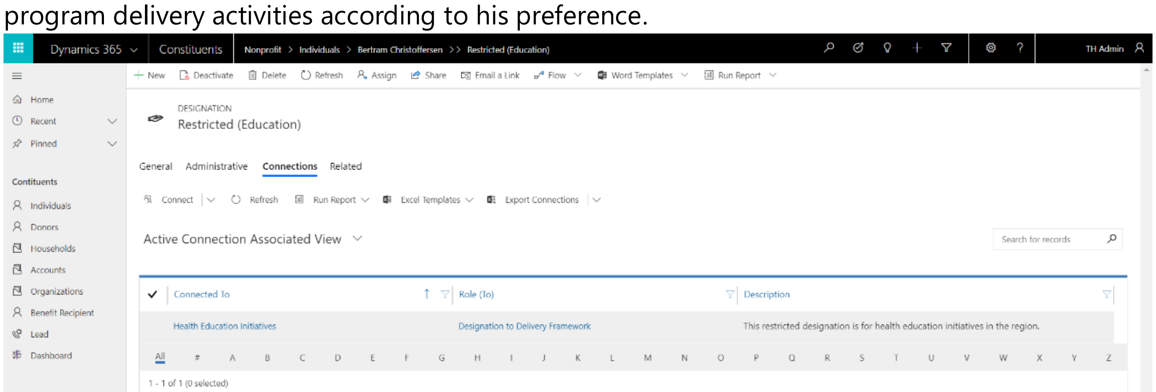
4. Click on **Related** and select **Donor Commitments**, to view Bertram's Donor Commitments. Each Donor Commitment record represents Bertram's commitment to donate to the Nonprofit. This view displays three commitments on three different dates in 2016, 2018 and 2019. Note each record is linked to a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



5. 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:

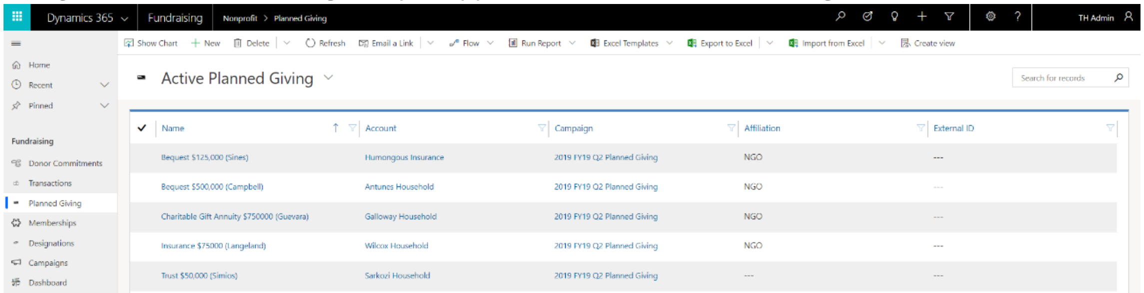


6. On the Restricted (Education) Designation, click on **Related**, then **Connections**. The Connections define how the Designation is related to Delivery Framework(s), indicating which funds are allocated to which program delivery activities. In this case, Bertram's Donor Commitment is designated for 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.

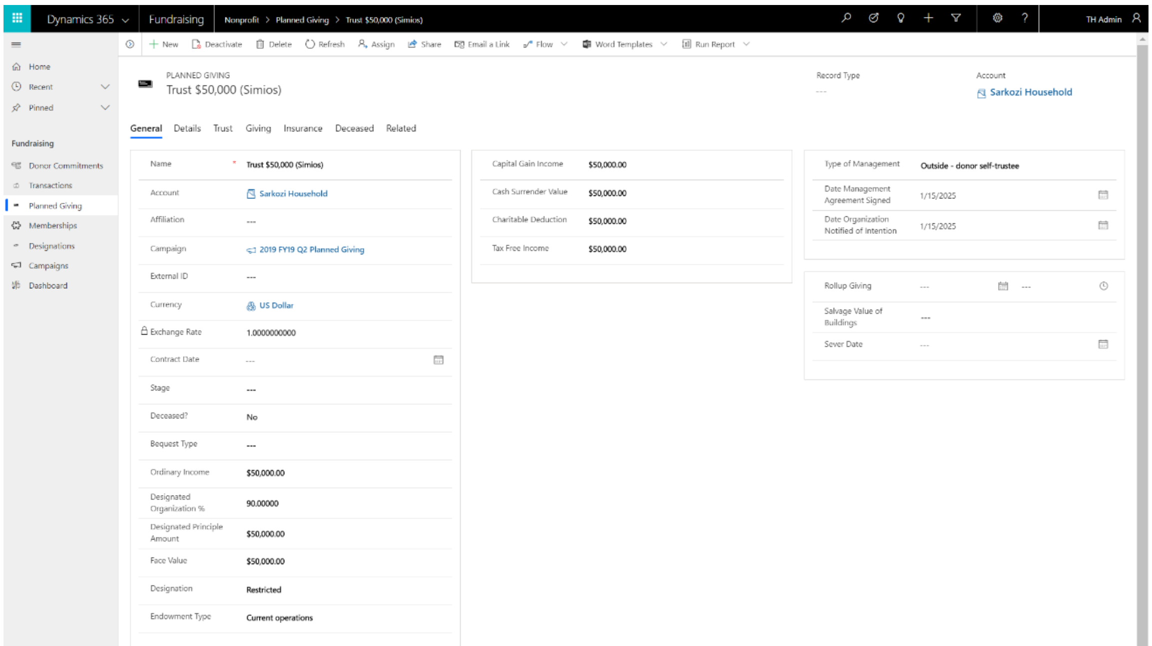


View Planned Gift

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



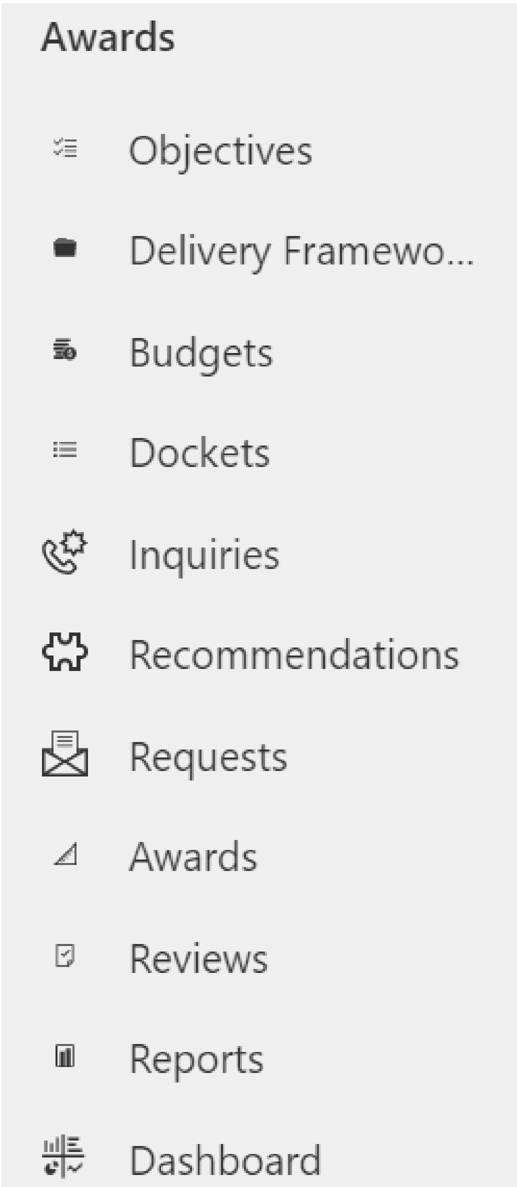
2. Click on the record for **Trust $50,000 (Simios).** The Planned Gift profile includes information related to tracking typical nonprofit prospective and/or actual planned gifts.. The sample record below is related to the Sarkozi Household.



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

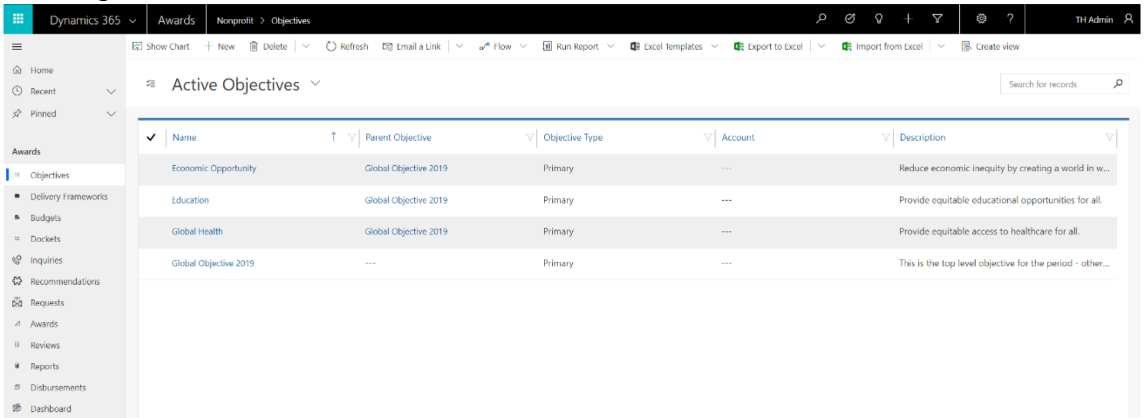
An agreement to provide or receive funding or support.

Disbursements

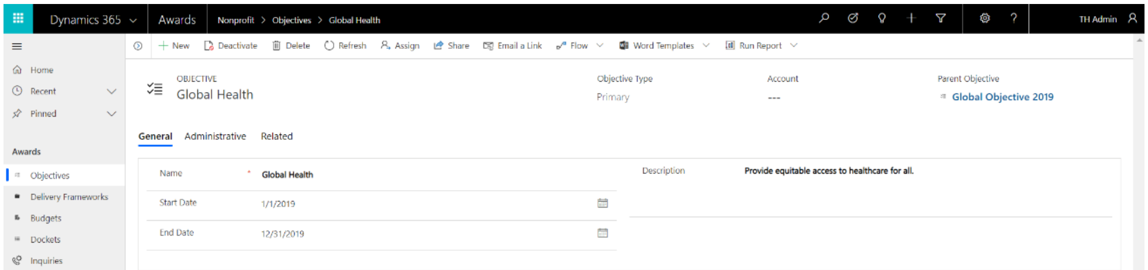
A payment related to an Award.

View Award Disbursements

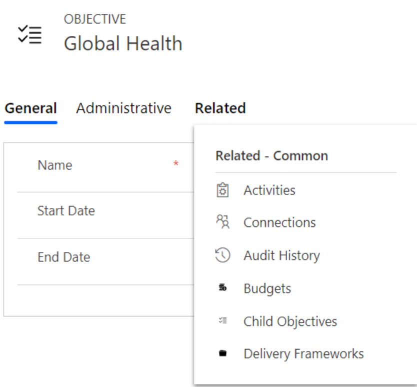
1. Navigate to the **Awards** Sample Application, view the Objectives by selecting **Objectives** in the left navigation:



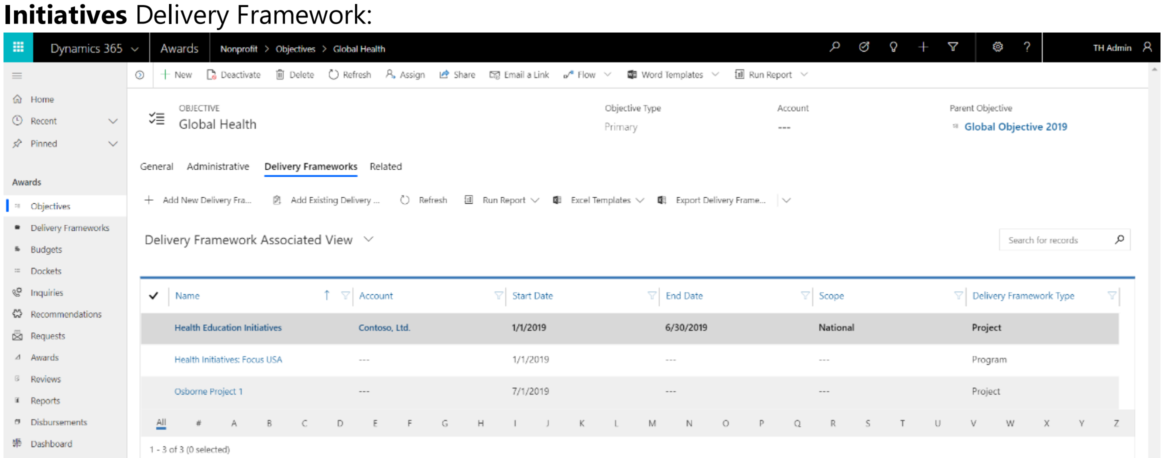
2. Select the **Global Health** Objective. The nonprofit's objective for Global Health is to "Provide equitable access to healthcare for all." This objective is scheduled for January 1 through December 31, 2019:



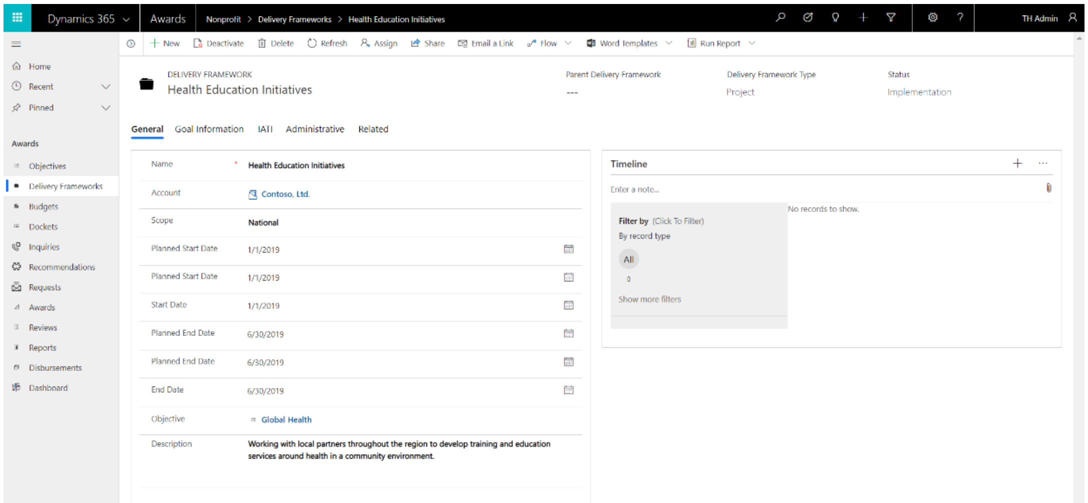
3. On the Global Health Objective, click on Related, then **Delivery Frameworks**.



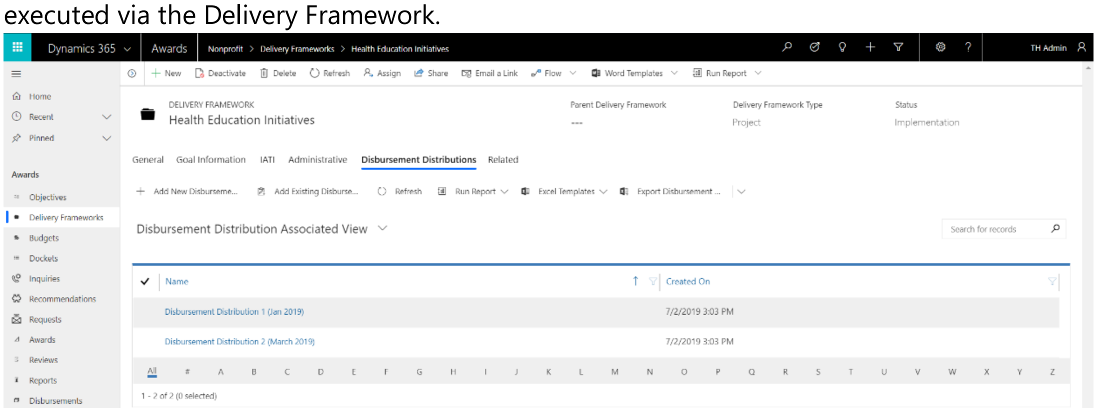
4. The Delivery Frameworks related to an Objective represent the initiatives or activities the nonprofit, or a third-party, will execute to achieve the Objective.. Select the **Health Education Initiatives** Delivery Framework:



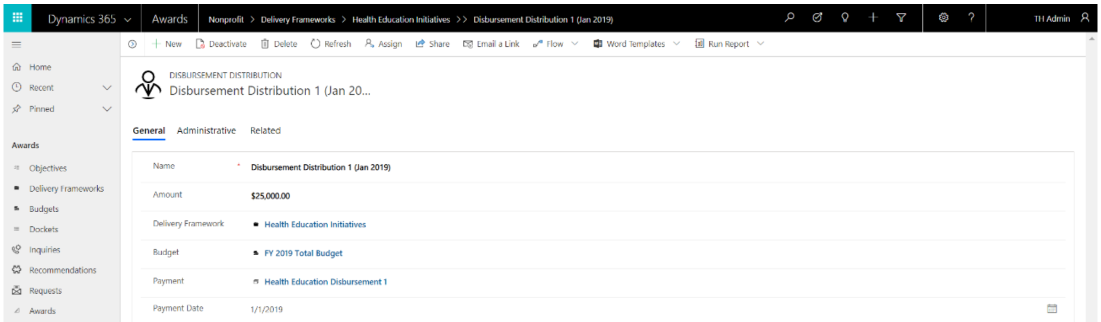
5. View the **Health Education Initiatives** Delivery Framework. The purpose of this project is to work “with local partners throughout the region to develop training and education services around health in a community environment.” The record includes important scope, date, and status details for the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



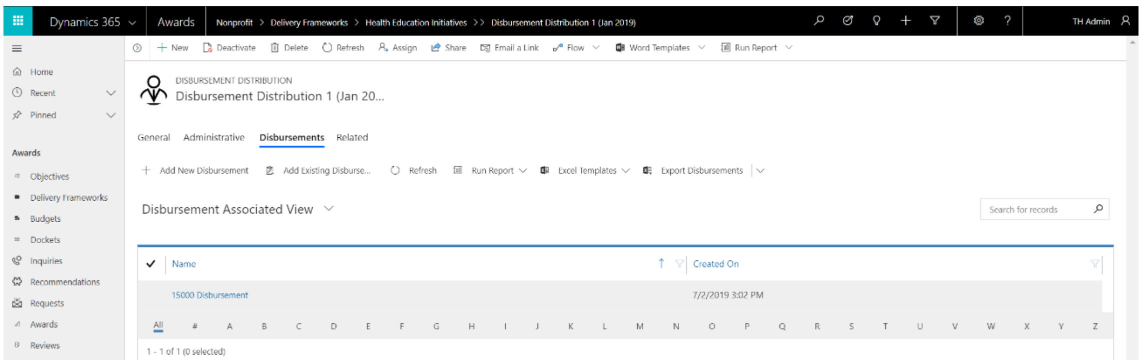
6. View the **Related** Disbursement Distributions. Disbursement Distribution link Award Disbursements, or specific allocations of funds, from an Award Disbursement (aka “payment”) to the Delivery Framework. This link represents the funds that enable the activities that will be executed via the Delivery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



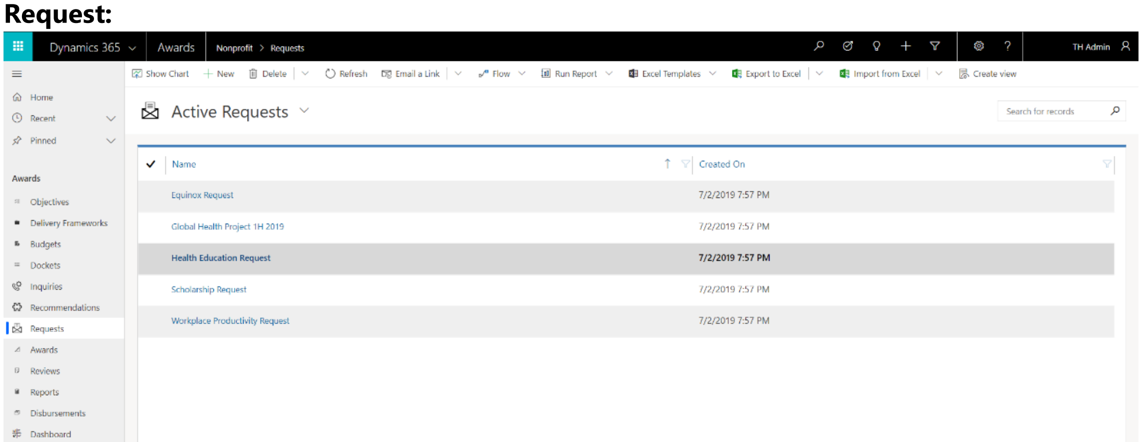
7. Select the **Disbursement Distribution 1 (Jan 2019)** Disbursement Distribution. This is the first of two payments to fund the Delivery Framework “Health Education Initiatives”:



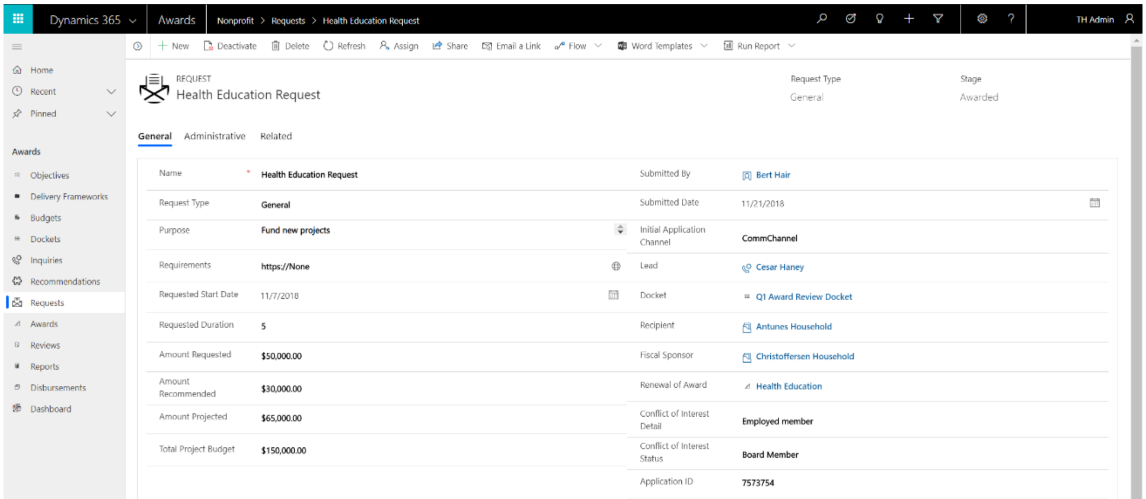
8. View the related Disbursements, which represent the individual payments supporting the Delivery Framework. In this case, a **$15,000 Disbursement** is recorded:



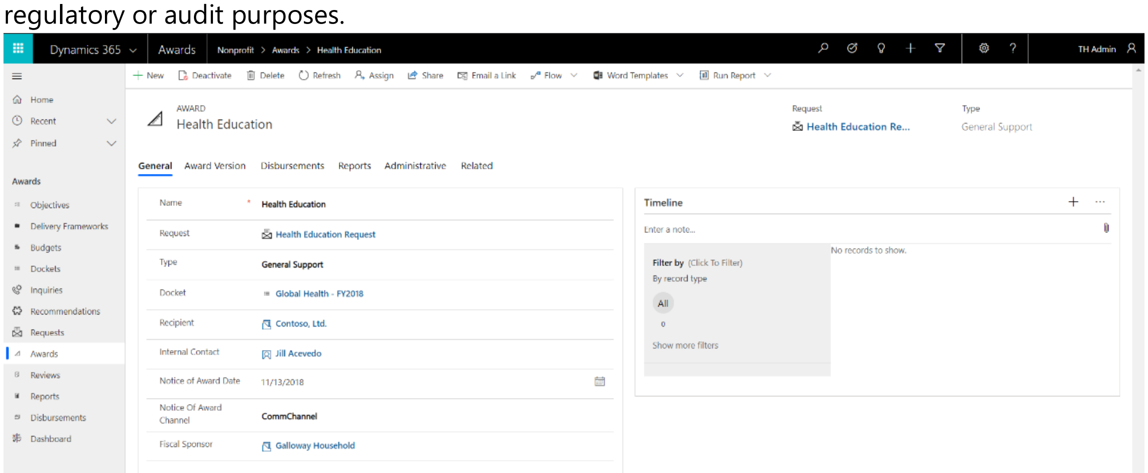
9. Select **Requests** from the App Navigation to view Requests., Select the **Health Education Request:**



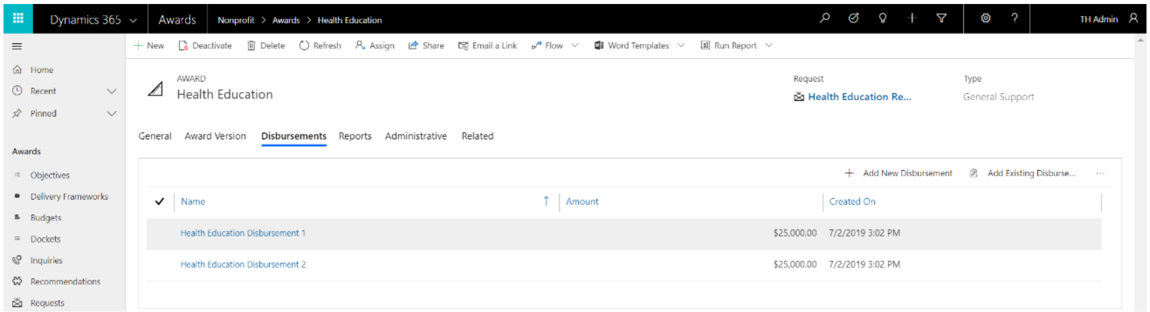
10. The **Health Education Request** details the type, stage, requested and actual amounts, dates and duration, Docket, Recipient, Sponsor ,and other related information about the Request for support:



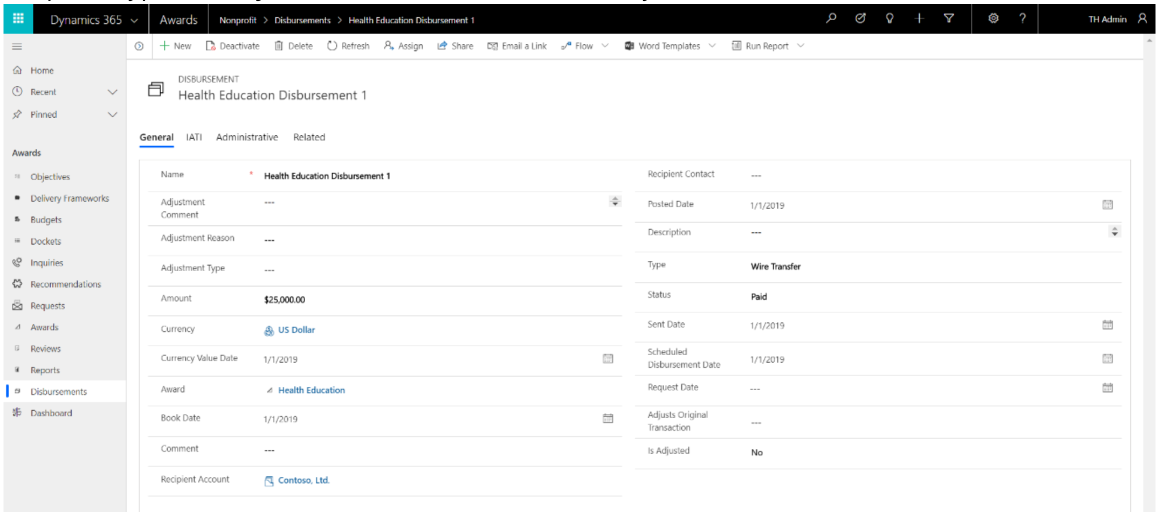
11. If a Request is accepted, it will have an associated Award. Requests that are not accepted do not have associated Awards. In this case, the Health Education Request was accepted, and therefore has Stage of "Awarded," and is related to a **Health Education Award**. The Award record is the central 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.



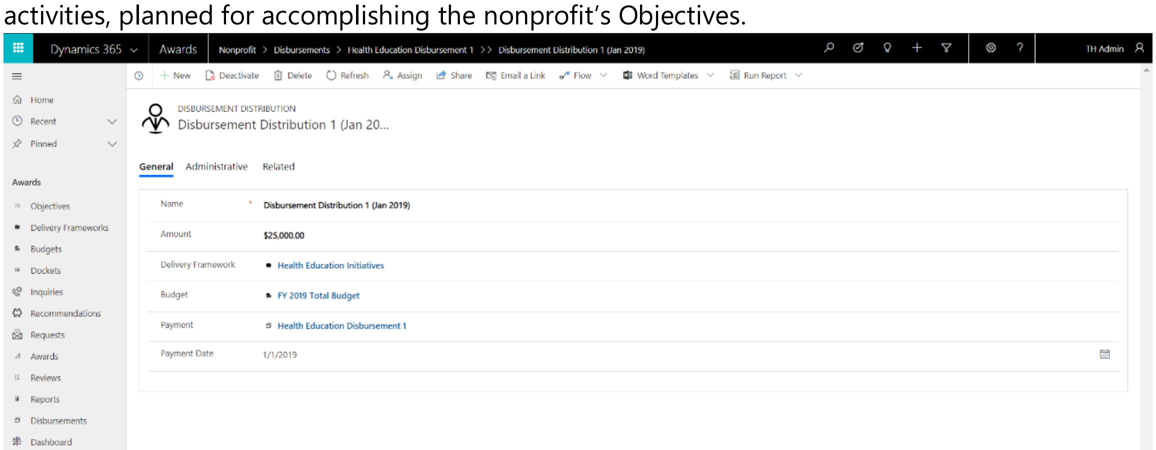
12. The related Award Disbursements record one or more planned or actual payments related to the Award.. In this case, there are two payments:


Dynamics 365
Awards
Nonprofit > Awards > Health Education
TH Admin
New
Deactivate
Delete
Refresh
Assign
Share
Email a Link
Flow
Word Templates
Run Report
Home
Recent
Pinned
Awards
Objectives
Delivery Frameworks
Budgets
Dockets
Inquiries
Recommendations
Requests
AWARD
Health Education
Request
Health Education Re...
Type
General Support
General
Award Version
Disbursements
Reports
Administrative
Related
Add New Disbursement
Add Existing Disburse...
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:

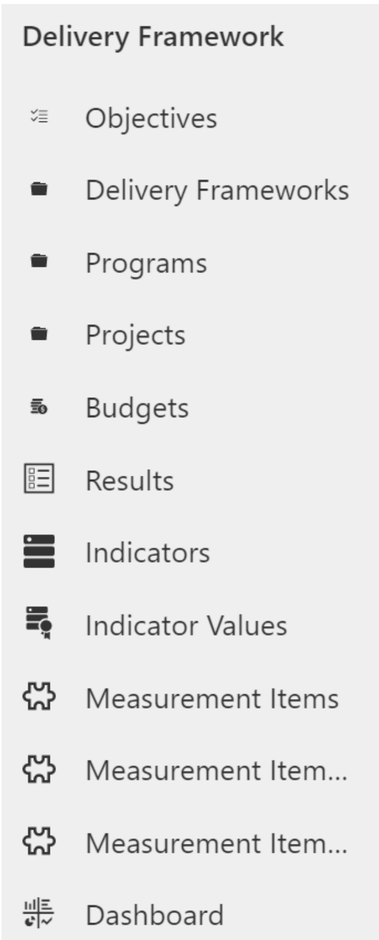


14. The related **Disbursement Distributions** link the Disbursement to one or more **Budgets** and/or **Delivery Frameworks**. This is the critical link between the Disbursement of funds from an Award and the Budgets allocated for the purpose of and/or the specific Delivery Frameworks, or activities,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



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

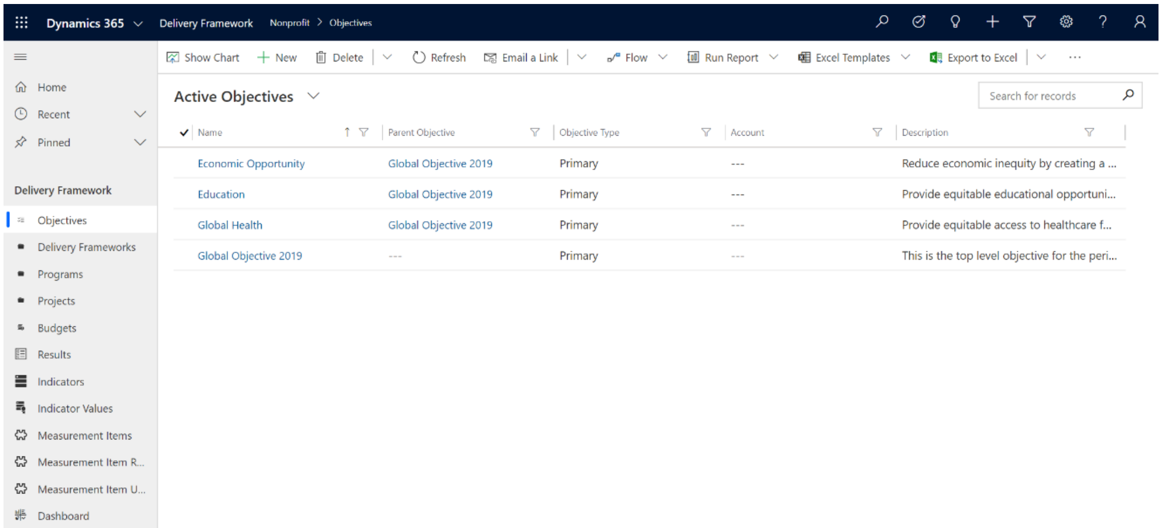
Used to track where measurement items have been used.

Benefit Recipients

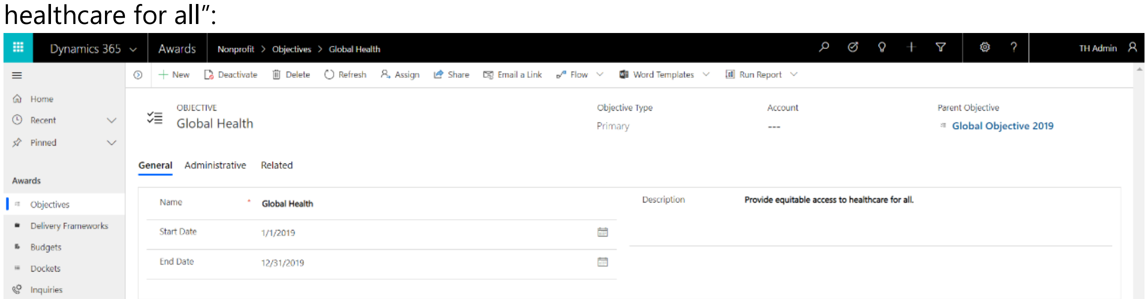
Any person or entity that is the recipient of the benefit of a nonprofit's activities.

Program Delivery

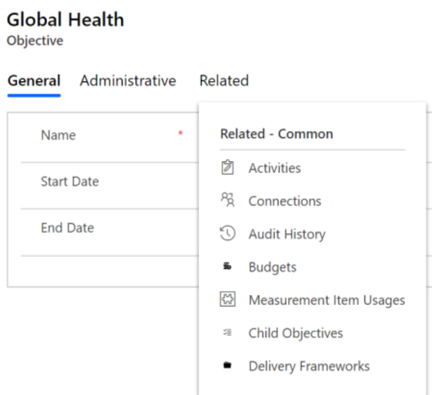
1. Navigate to the **Delivery Framework** Sample Application, view the **Objectives**:



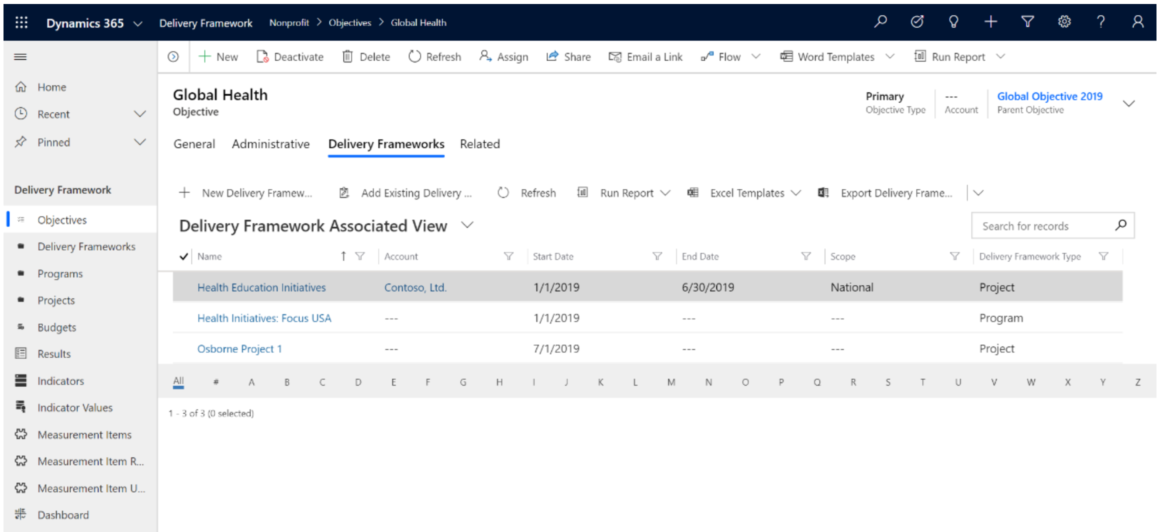
2. Select the **Global Health** Objective. The nonprofit's objective is to "Provide equitable access to healthcare for all":



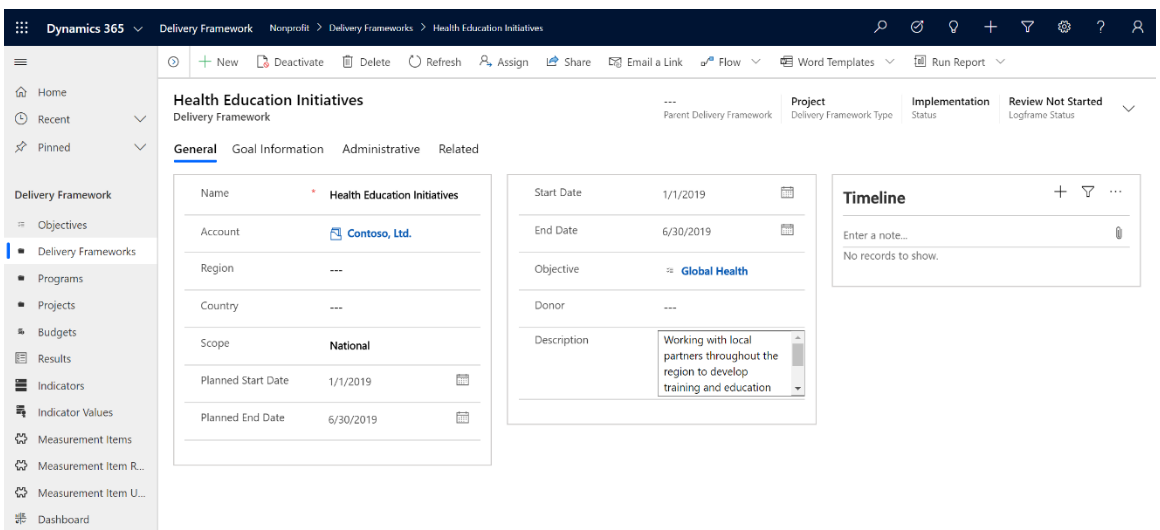
3. On the Global Health Objective, click on Related, then select **Delivery Frameworks**.


Global Health
Objective
General
Administrative
Related
Name
Start Date
End Date
Related - Common
Activities
Connections
Audit History
Budgets
Measurement Item Usages
Child Objectives
Delivery Frameworks

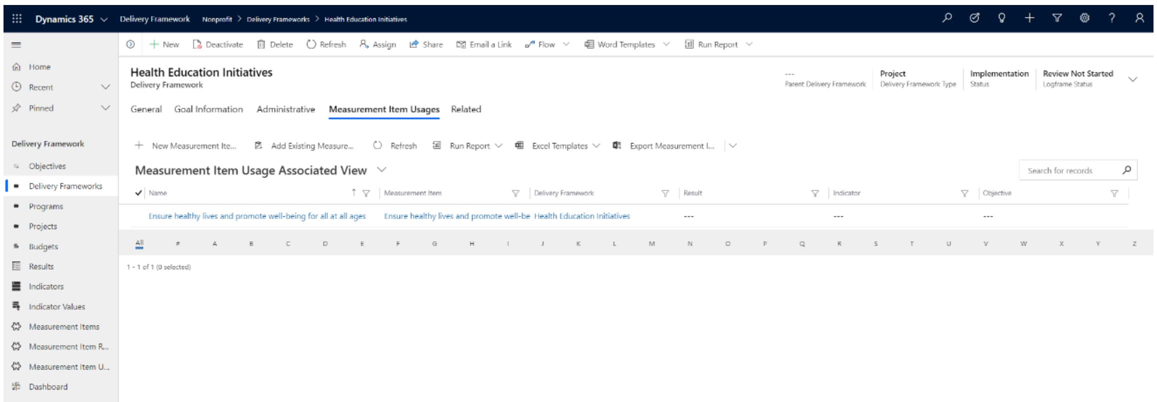
4. The Delivery Frameworks related to an Objective represent the activities the nonprofit, or a third-party, will execute to achieve the Objective.. Select the **Health Education Initiatives** Delivery Framework:



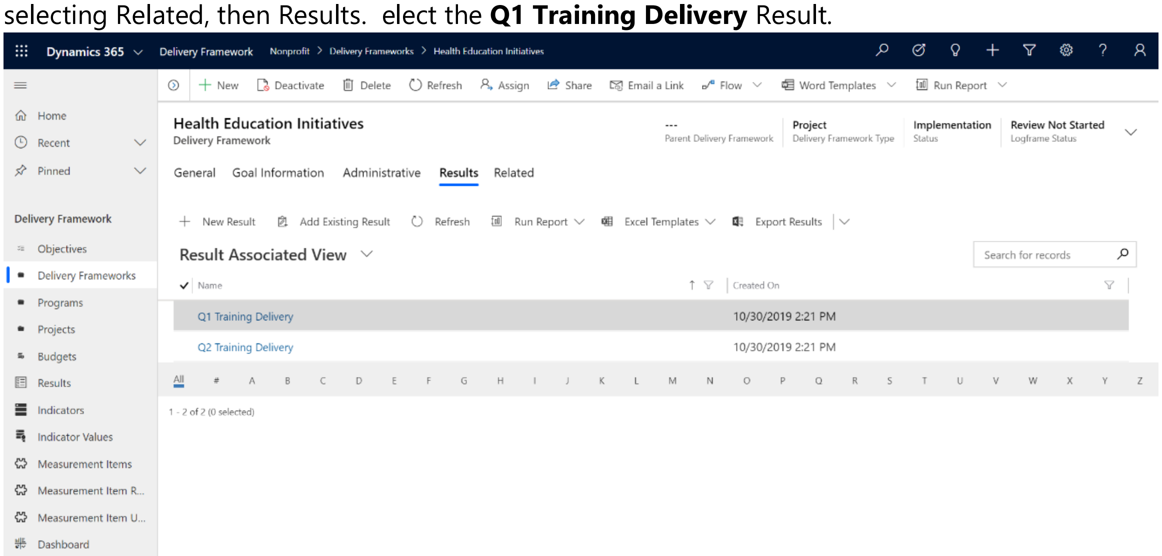
5. View the **Health Education Initiatives** Delivery Framework. The purpose of this project is to work "with local partners throughout the region to develop training and education services around health in a community environment." The record includes important scope, date and status details:



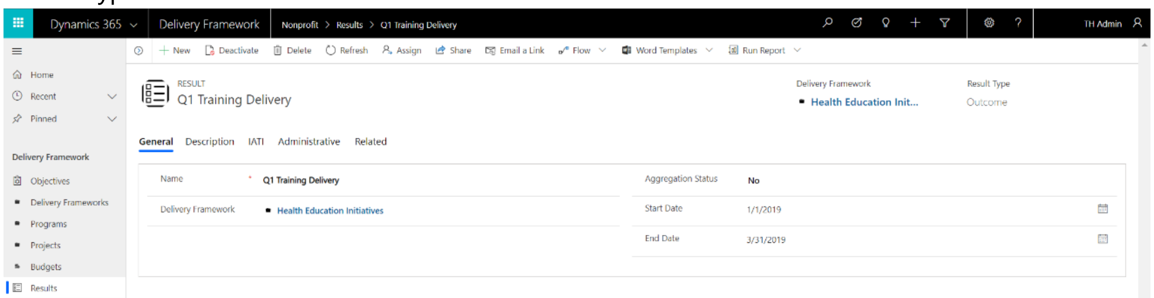
6. Select Related then **Measurement Item Usage**. This Measurement Item Usage record links the Measurement Item to the Delivery Framework. In this case, Health Education Initiatives is being measured by the ability to "Ensure healthy lives and promote well-being for all at all ages" (which also happens 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.



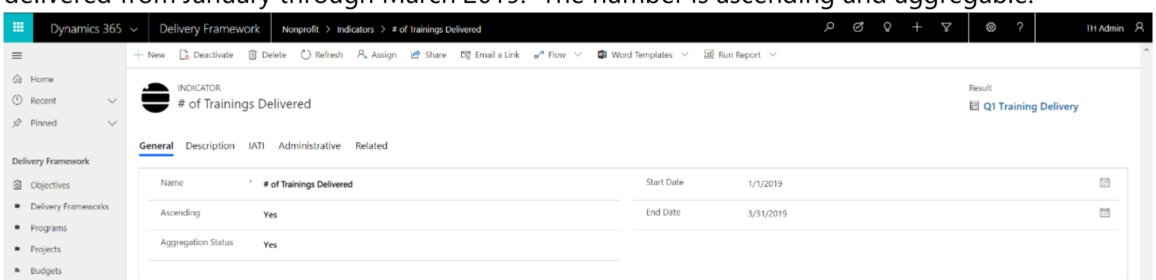
7. View the Results related to the Health Education Initiatives Delivery Framework project by selecting Related, then Results. elect the **Q1 Training Delivery** Result.



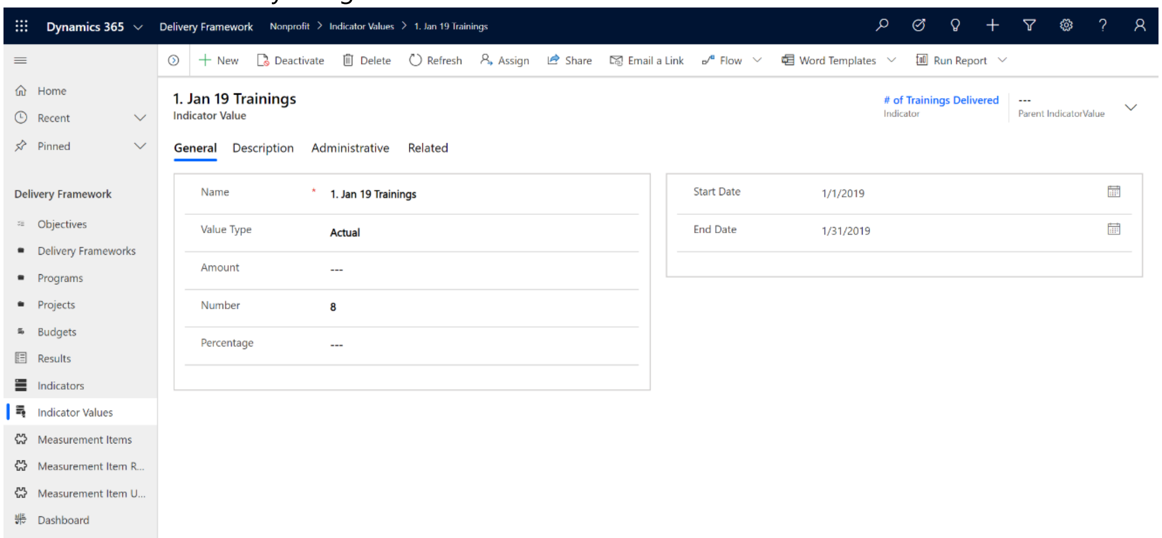
8. The Result is a time-based (see start and end dates) summary of the intended Outputs, Outcomes and/or Impacts related to the Health Education Initiative Project. This key value is defined in the Result Type.



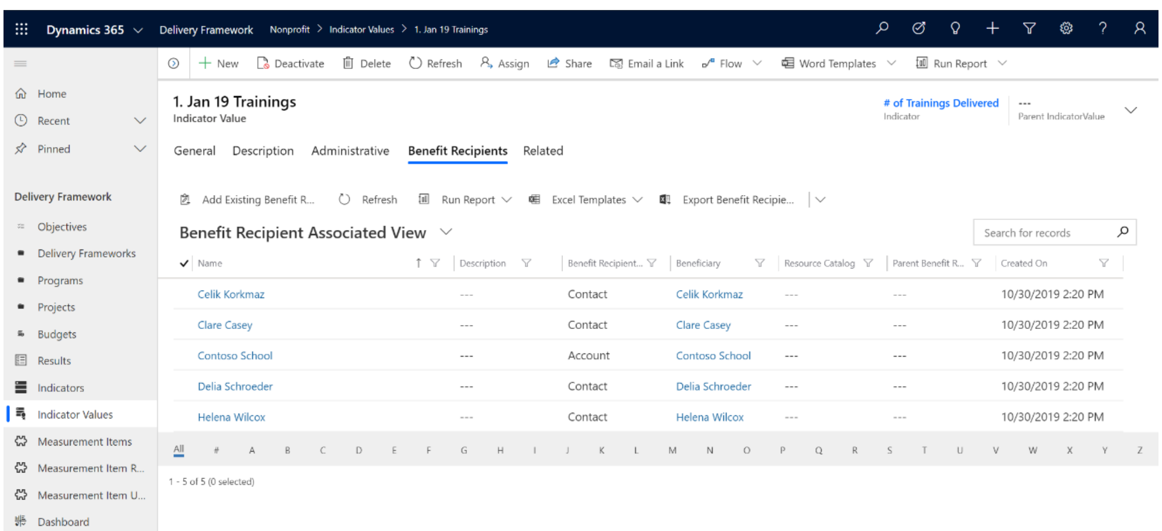
9. Select **Related** then **Indicators** and select the **# of Trainings Delivered** Indicator. This Indicator defines what will be measured and/or monitored, for what period and whether the measurement is ascending and/or aggregable. In this case, the nonprofit will measure the number of trainings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

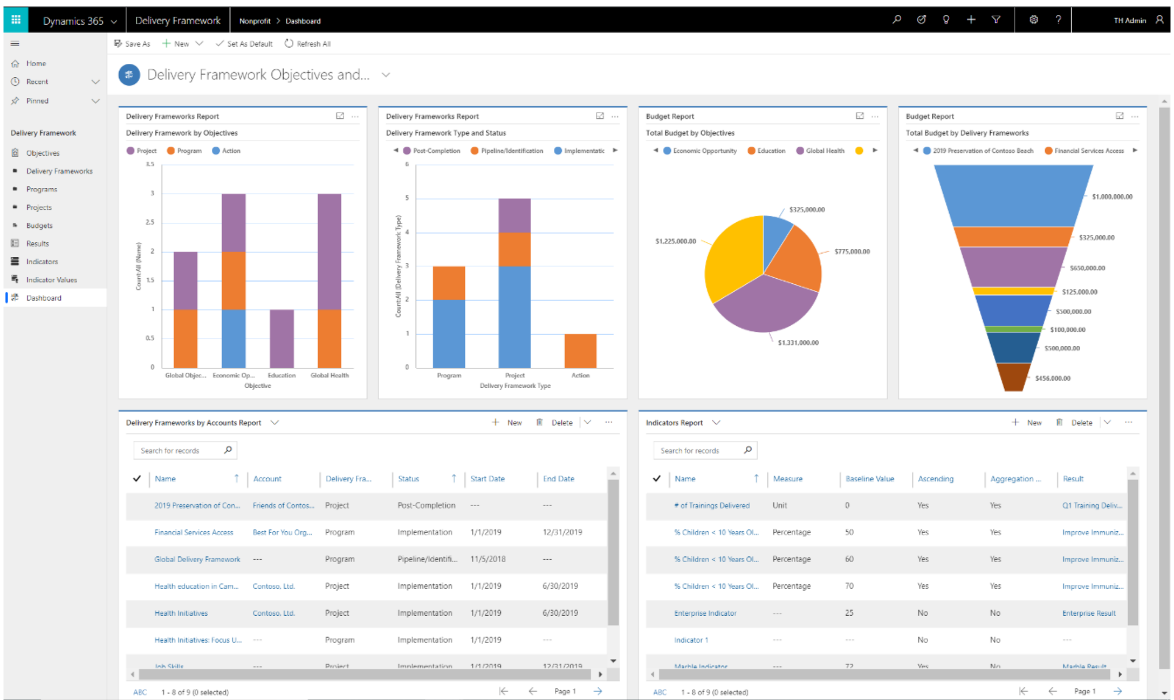


11. Select Related then **Benefit Recipients**. The Benefit Recipient view details the specific Individuals that were trained during the month of January 2019. In this case, four Contacts and one Account are named.



View Program Delivery Dashboard

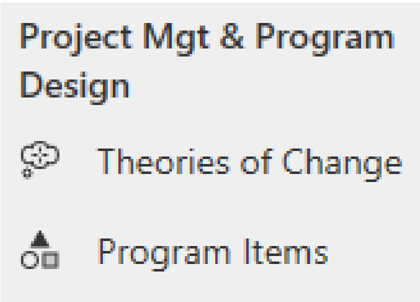
1. Navigate to the **Delivery Framework** Sample Application, select **Dashboard** in the left navigation. The sample **Delivery Framework Objectives and Results** dashboard displays several key insights:
    a. Delivery Frameworks by Objective
    b. Delivery Framework by Type and Status
    c. Total 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

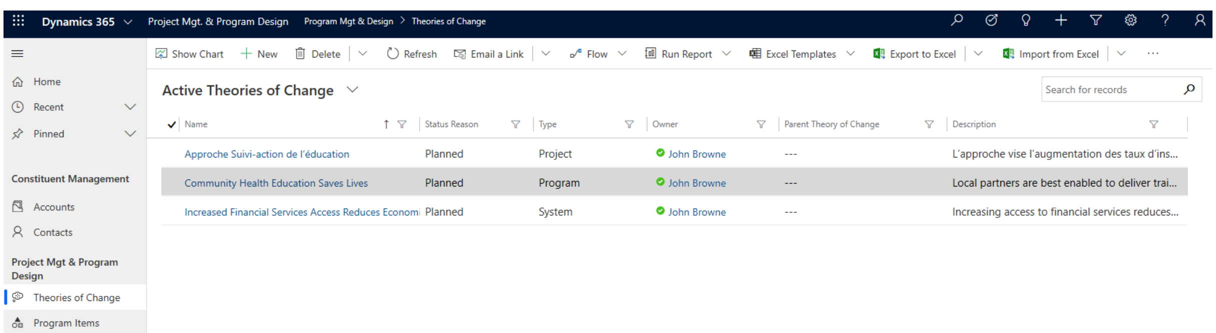
Theories of Change are hypotheses for achieving a desired social impact and are comprised of a sequence of cause-and-effect actions or occurrences.

Program Items

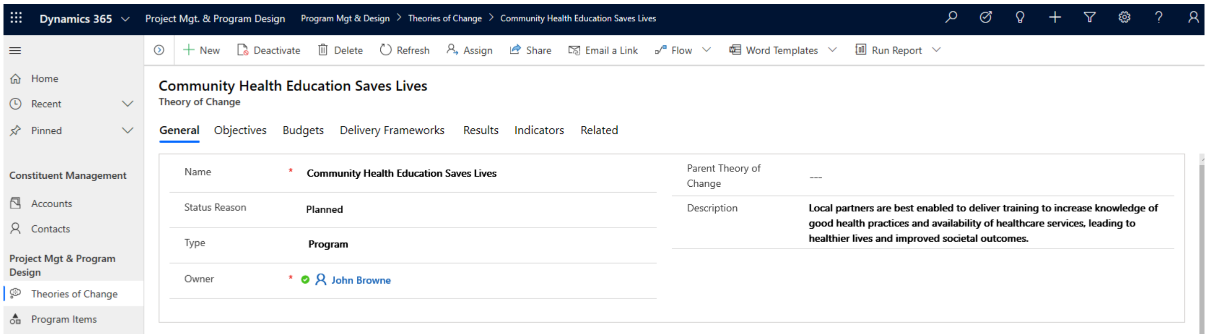
Program Items detail the program elements that contribute to proving or disproving a Theory of Change such as assumptions, deliverables, decisions, milestones, obligations, observations, or risks.

Sample Theory of Change

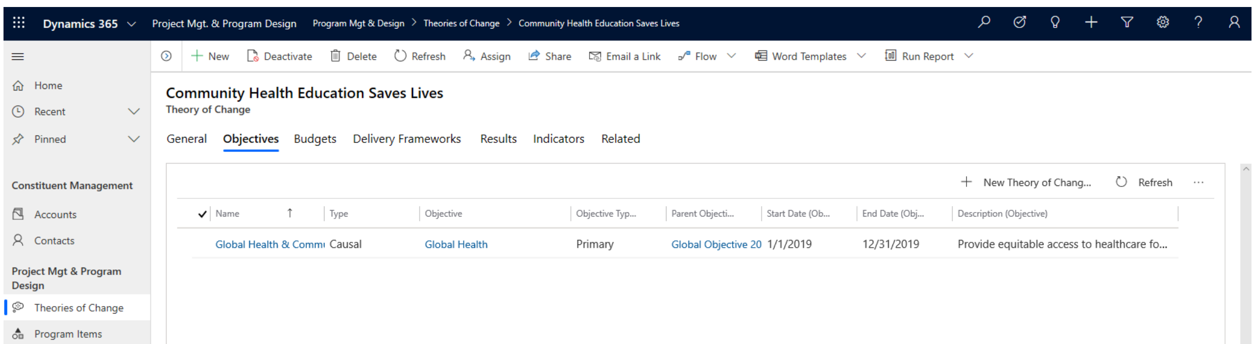
1. Navigate to the **Project Management and Program Design** solution, and view the **Theories of Change**:



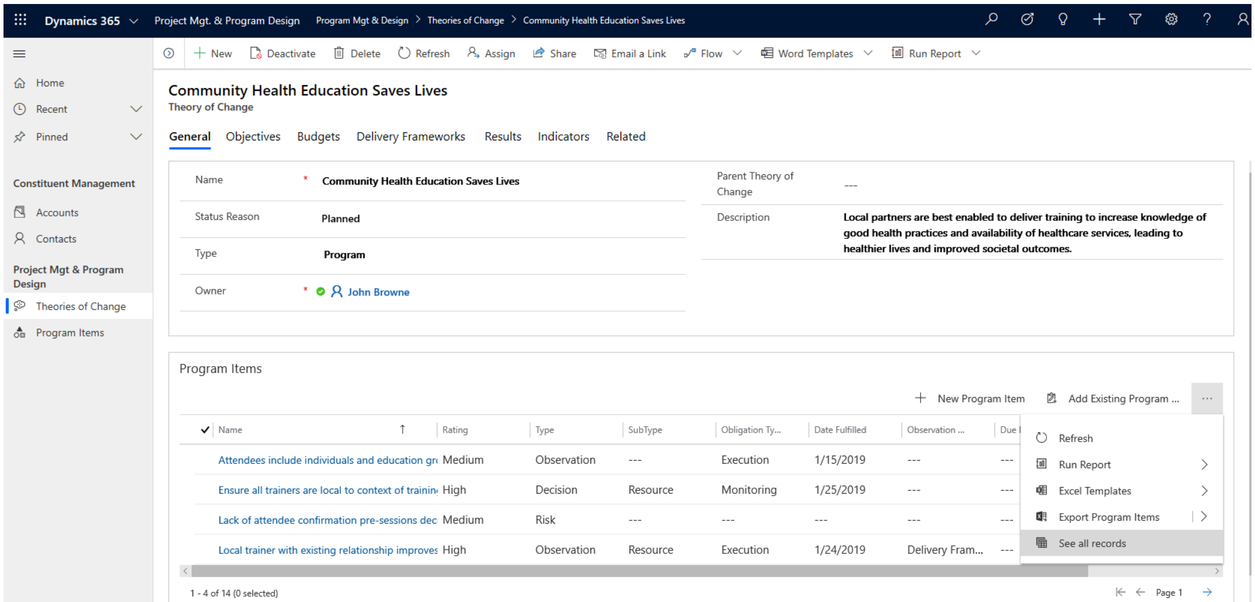
2. Select the **Community Health Education Saves Lives** Theory of Change, which corresponds to a planned program (denoted by the Status Reason and Type), and is summarized in the description that “Local partners are best enabled to deliver training to increase knowledge of good health practices and 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
Home
Recent
Pinned
Constituent Management
Accounts
Contacts
Project Mgt & Program Design
Theories of Change
Program Items
Community Health Education Saves Lives
Theory of Change
General
Objectives
Budgets
Delivery Frameworks
Results
Indicators
Related
Name
Community Health Education Saves Lives
Status Reason
Planned
Type
Program
Owner
John Browne
Parent Theory of Change

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.
Program Items
New Program Item
Add Existing Program ...
Name
Rating
Type
SubType
Obligation Ty...
Date Fulfilled
Observation ...
Attendees include individuals and education gr
Medium
Observation

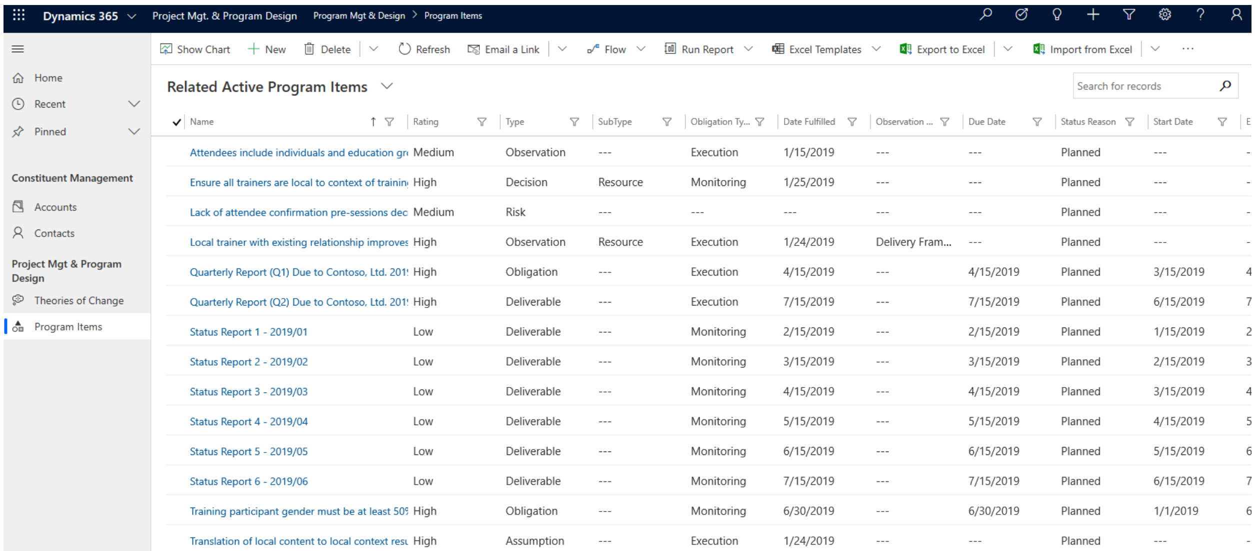
Execution
1/15/2019

Ensure all trainers are local to context of trainin
High
Decision
Resource
Monitoring
1/25/2019

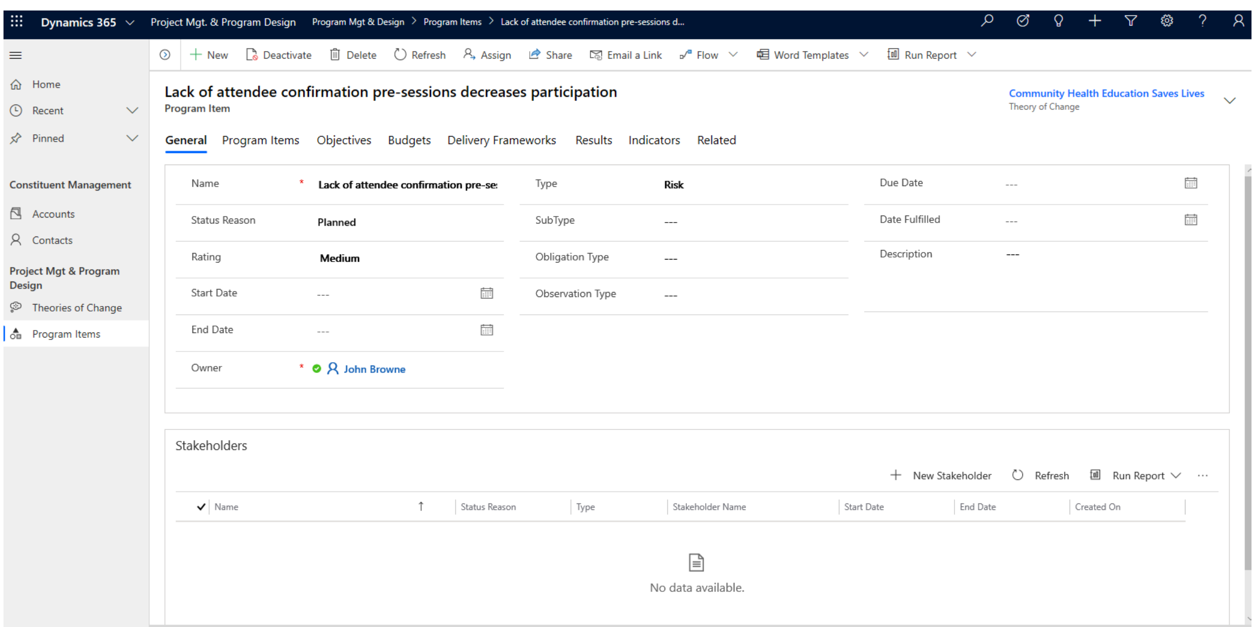
Lack of attendee confirmation pre-sessions dec
Medium
Risk

Local trainer with existing relationship improves
High
Observation
Resource
Execution
1/24/2019
Delivery Fram...
Refresh
Run Report
Excel Templates
Export Program Items
See all records
1 - 4 of 14 (0 selected)
Page 1

5. 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.

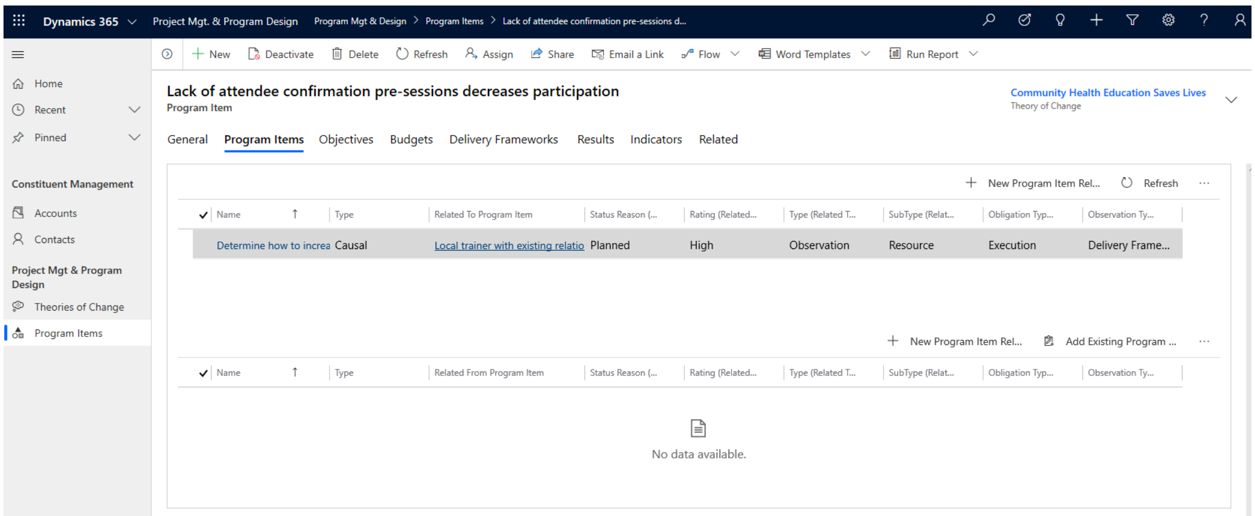


6. Per the Type column, there is one risk to the project: the "Lack of attendee confirmations pre-sessions decreases participation." Click on the record.

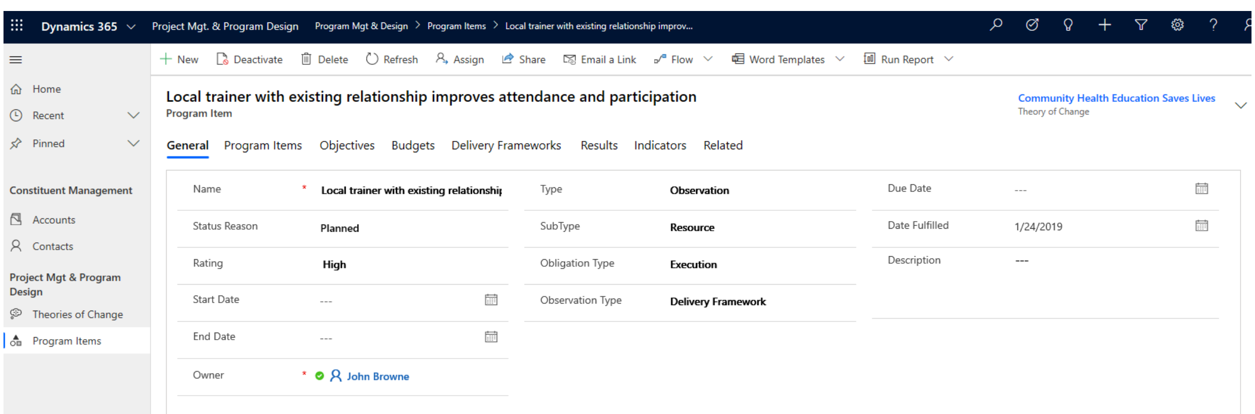


7. There are a number of data points and tabs displayed. As with a Theory of Change, the tabs across the top show all Program Design records related to this Program Item, including other Program Items. Click the **Program Items** tab.

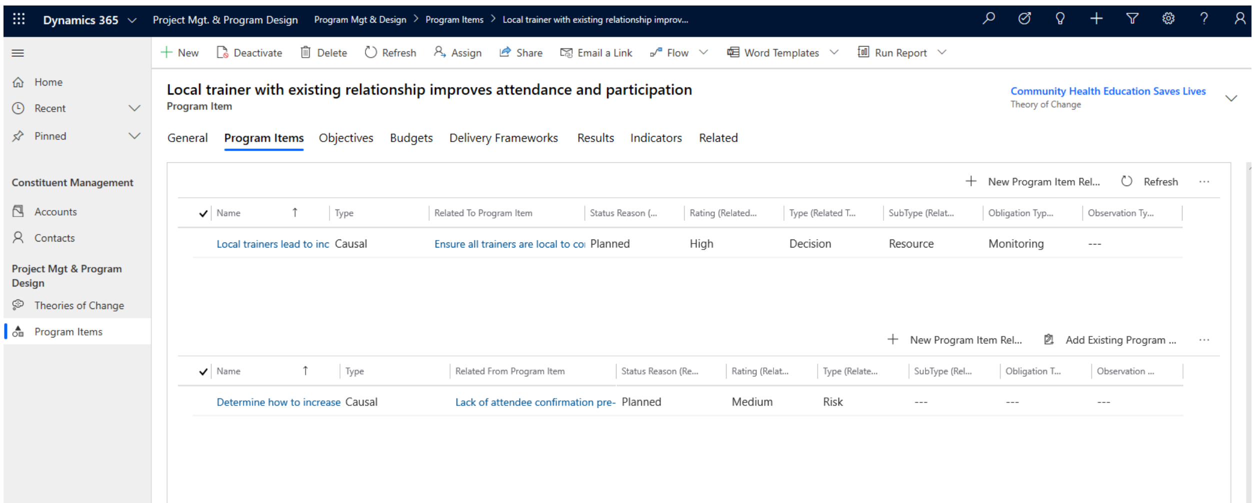
8. The Risk, “Lack of attendee confirmations pre-sessions decreases participation” was cause for trying to “Determine how to increase attendance” (listed in the Name column). There is an Observation that “Local trainer with existing relationship improves attendance and participation.”



9. 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.

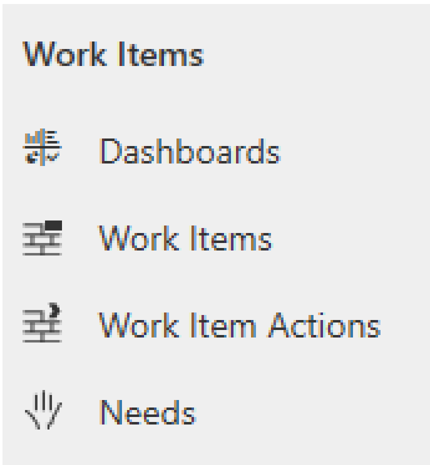


10. To view a chain of all Program Items related to “Local trainer with existing relationship improves attendance and participation,” click the **Program Items** tab. The bottom grid shows that the Risk “Lack of attendee confirmation pre-sessions decreases participation” caused program personnel to make 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.



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

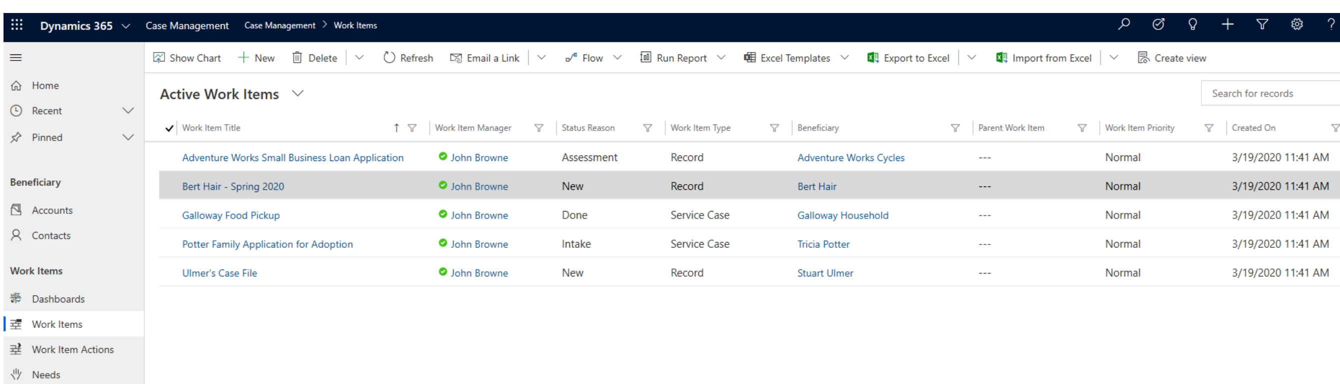
Work Item Actions are units of work that are assigned and tracked under a Work Item.

Needs

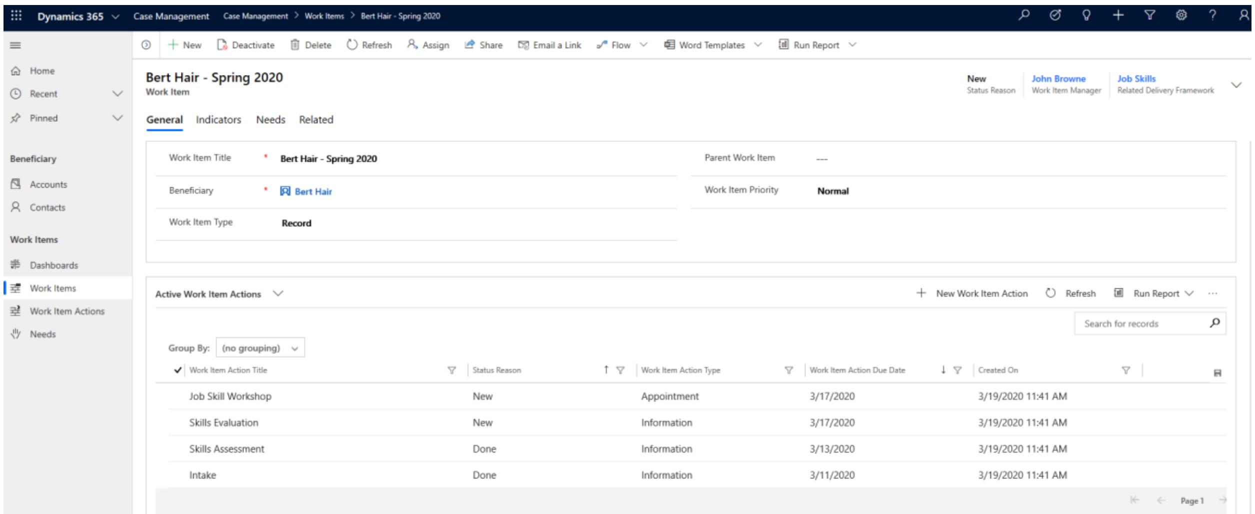
Needs provide a method of tracking a beneficiary's needs, and case work that has been done to address those needs.

Sample Work Item

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

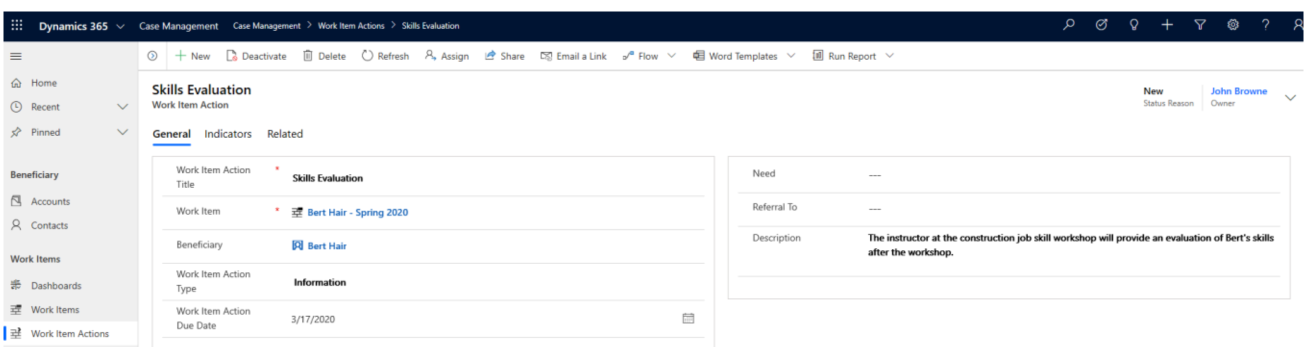


2. Click and open the **Bert Hair – Spring 2020** Work Item. This screen displays an overview of all activity related to working with the Beneficiary **Bert Hair**, as it pertains to this case. At the top right of the screen, there are three important fields:
    1) Status Reason shows the work item 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**



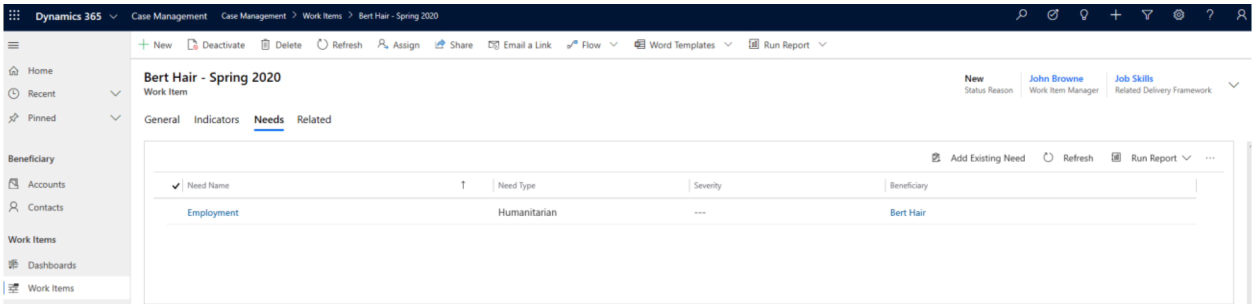
3. Scroll to the bottom of the page to see a list of all the Work Item Actions related to Bert's record. It seems Bert has completed his Intake and Skills Assessment and is scheduled to attend a Job Skill Workshop and have a Skills Evaluation, but both on the same day. That seems odd.

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.

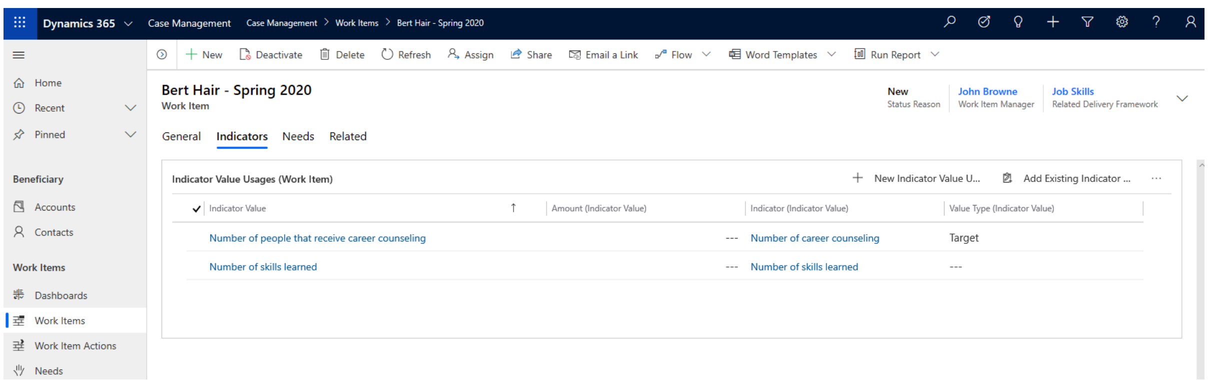


5. Return to the Work Item by clicking on the blue work item text **Bert Hair – Spring 2020**.

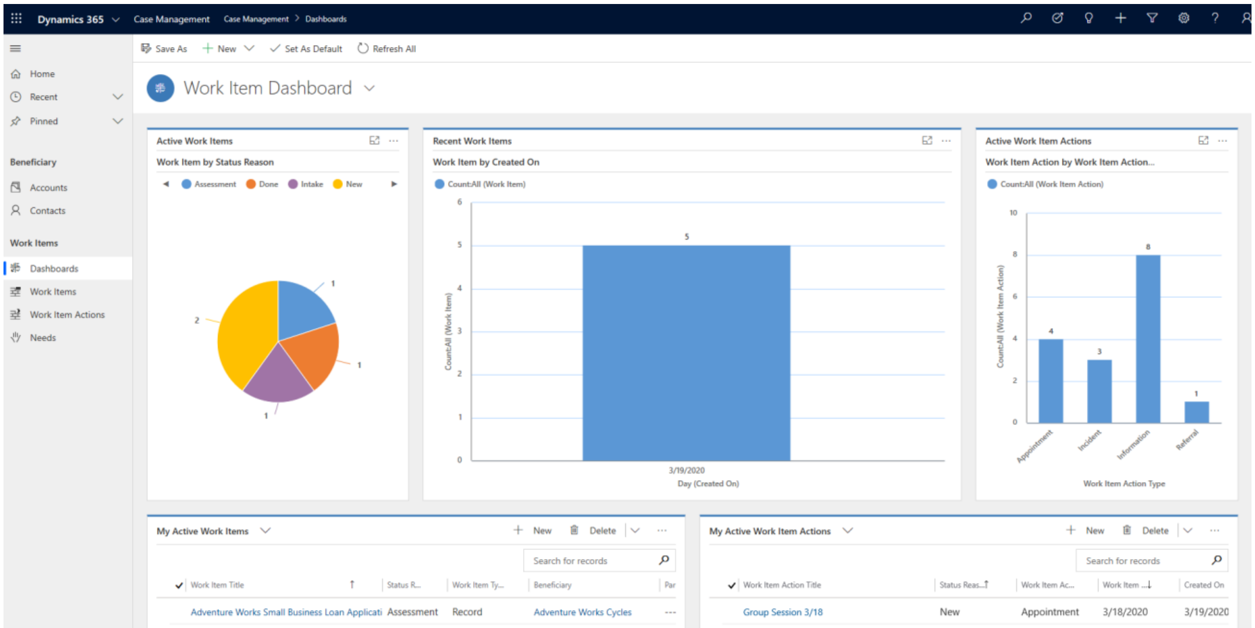
6. To find out why Bert is in the system, click the **Needs** tab. Here, Bert's need for **Employment** is recorded.



7. 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**.

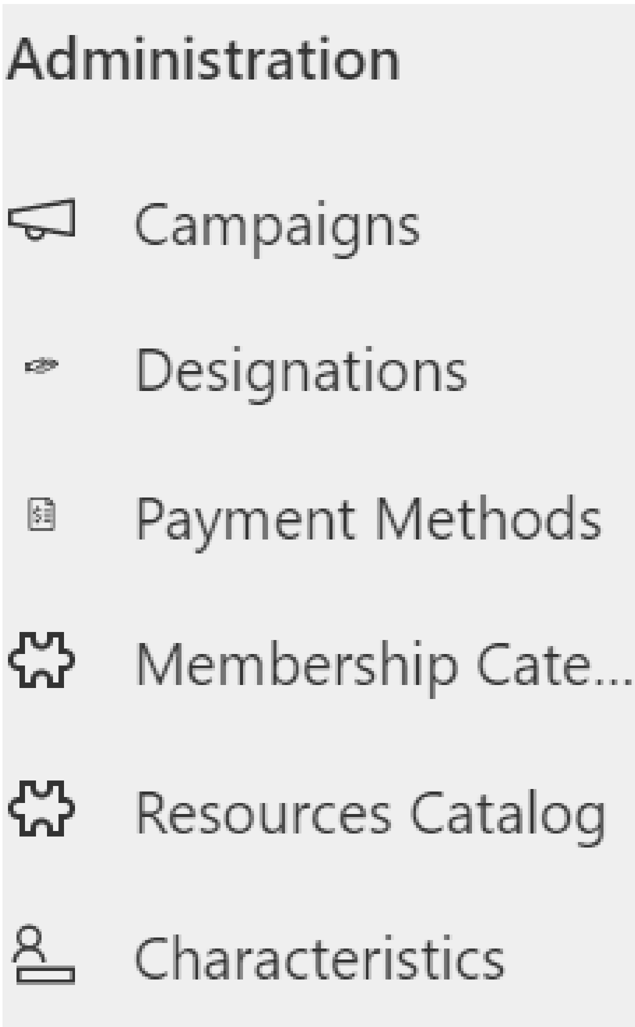


8. In the left navigation, click **Dashboards** to view the Dashboard showing all the Active Work Items by Status Reason, Recent Work Items and Work Item Action by type.


Dynamics 365
Case Management
Case Management > Dashboards
Save As
New
Set As Default
Refresh All
Home
Recent
Pinned
Beneficiary
Accounts
Contacts
Work Items
Dashboards
Work Items
Work Item Actions
Needs
Work Item Dashboard
Active Work Items
Work Item by Status Reason
Assessment
Done
Intake
New
Recent Work Items
Work Item by Created On
Count:All (Work Item)
3/19/2020
Day (Created On)
Active Work Item Actions
Work Item Action by Work Item Action...
Count:All (Work Item Action)
Appointment
Incident
Information
Referral
Work Item Action Type
My Active Work Items
New
Delete
Search for records
Work Item Title
Status R...
Work Item Ty...
Beneficiary
Par
Adventure Works Small Business Loan Applicati
Assessment
Record
Adventure Works Cycles
My Active Work Item Actions
Work Item Action Title
Status Reas...
Work Item Ac...
Work Item ...
Created On
Group Session 3/18
New
Appointment
3/18/2020
3/19/2020

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.