BetterUnite Enterprise

Key Usage Summary and Application Scenarios

Fundraising Tools Built on Dynamics 365

BetterUnite provides the tools organizations need to raise money and maintain an accurate 360° view of their donors

Key Usage Summary

Nonprofit Event Management

- Ticket and Sponsorship Sales
- Branded Event Pages
- Immersive Mobile Guest Experience
- Live Auction
- Silent Auction
- Credit Card Preauthorization
- Guest Check-In
- Paddles Up and Fund-a-Need Support
- Automated Event Reminders
- Fair Market Value calculation
- Automated Confirmation Emails and Dynamic Tickets

Key Usage Summary

Virtual Events

- Host Fundraiser Events Online
- Live-stream Event within page
- Immersive and Mobile-Optimized Guest Experience
- Live Auction, with dynamic auctioneer tools
- Silent Auction
- Preauthorization of credit cards
- Auto-process Winning Bids
- Send Receipts and Donor Acknowledgements

Key Usage Summary

Live Auctions

- Stylish and Effective Live Auction preview
- Allow Guests to Preauthorize Credit Cards before or at event
- Auto-Assign Paddle Numbers or Assign at Check-in
- Offer Preview of Live Auction Items on Guests' Personalized Event Page
- Responsive and Fast Shopping Cart
- Easily Note Winning Paddle Numbers in Shopping Cart
- Guest Checkout with calculated FMV and branded, itemized receipt
- Auto-Send Receipts and Donor Acknowledgements

Key Usage Summary

Silent Auctions & Mobile Bidding

- Create Auction Items
- Minimum Bids, Increments, Reserves & Buy It Now Options
- Accept Online and Mobile Bids At Anytime
- Personalized Mobile Experience for Guests and Participants
- Text Notifications When Outbid, with Next Increment Prompts
- Optionally Pre-register Potential Bidders
- Display Scorecard for Real-time Updates on Auction Items
- Complete Auction, Auto-Collect Payments for Winning Bids
- Send Receipts and Donor Acknowledgements

Usage Scenario

Livestream Fundraising Event

Community Works, a nonprofit organization, hosts a live-streamed fundraising event.

- Community Works builds an event page with a Microsoft Teams or Zoom link for the live-stream event
- They reach out to supporters to encourage registrations to the live-stream
- Community Works encourages registrants to preauthorize credit cards for use during the live-stream, to buy items and make donations
- They create a Silent Auction that their guests can participate in prior to the live-stream, as well as during
- Community Works creates Live Auction items and make those visible to their registrants, so registrants can see and consider those items in advance of the live-stream
- Guests are sent a text and email with a link to their personalized event page, where they can bid on Silent & Live Auction items and raffle tickets, and make donations
- Community Works engages an MC who runs a Live Auction and Fund-A-Need raise during the live-stream
- During live-stream, MC has ability to drive live auction bidding via BetterUnite
- At the end of the live-stream, staff checks-out guest carts and closes the Silent Auction, guests are sent automated, itemized receipts and donor acknowledgements

Usage Scenario

Annual GALA

Community Works, a nonprofit organization, puts on an Annual Fundraising Gala every year at XYZ Hotel.

- Community Works solicits sponsorships and table and ticket sales, using BetterUnite's event module
- They encourage ticket, table and sponsorship purchasers to provide their guests' information and to preauthorize credit cards for use at the gala, to buy items and make donations
- They create a Silent Auction that their guests can participate in prior to the event, as well as at the event
- Community Works has Live Auction items that they create in the shopping cart and make visible to their guests, so guests can see and consider those items in advance of the event
- On the day of the Gala, Community Works enlists staff and volunteers to check-in guests, using BetterUnite
- At check-in, staff assign paddle numbers to guests and preauthorize credit cards for those who have not done so in advance
- Guests are sent a text with a link to their personalized event page, where they can bid on Silent Auction items, buy drink or raffle tickets and make donations
- Community Works hires an auctioneer who runs a Live Auction and Fund-A-Need raise on stage; guests raise paddles to bid or donate, and staff uses the Shopping Cart to add Live Auction items to winning bidders carts
- At the end of the evening, staff check-out guest carts and close the Silent Auction; guests are sent automated itemized receipts and donor acknowledgements

Key Usage Summary

Online Fundraising

- Crowdfunding Campaigns
- Peer-to-Peer Campaigns
- Custom Branded Pages
- Text Donations
- Embedded Campaigns
- Credit Card or Pay by E-check
- Perk and Fulfillment Tracking
- Many Customization Opportunities

Usage Scenario

Fundraising Peer-to-Peer Appeal

Community Works, a nonprofit organization, organizes an annual fundraising appeal.

- Community Works builds an Online Fundraiser in BetterUnite and pushes it out virtually, leveraging emails, social media and text messages

- The Online Fundraiser has offers that describe the needs of their clients with detailed pricing for each need

- A Funding Thermometer on the Online Fundraiser page shows progress toward the Campaign's goal

- All of the donor data and donation data filters into the 360 degree donor view in Dynamics 365

- A Default Email Note is sent to each donor to the campaign which has the 501(c)(3) tax acknowledgement language necessary for donor receipts

Key Usage Summary

Text To Give

- Accept Text Donations
- Easy and Quick Set-up
- Select Phone Number
- Create short-codes to direct donors to specific events or campaigns
- Auto-reminders for Incomplete Donations
- Accept Donations Anytime in Any Setting
- View SMS/Text Activity in Dynamics

Usage Scenario

Text to Give
Congregation Appeal

Community Church, a faith-based organization, offers Text to Give as a giving option.

- Community Church builds a custom branded Giving Page that allows for flexible fundraising options
- They claim a no-cost, BetterUnite text to give phone number
- They assign an SMS keyword to the Giving Page
- At their Sunday Church Service, the pastor announces a call to give to the church via text to the congregation
- "Get out your phones. Text GIVE to 512.783.ABCD to make a donation to our church" is the message from the pastor
- The church projects onto the screen and has written in their weekly program the text to give phone number and the keyword
- A Funding Thermometer on the Giving Page shows progress toward the Campaign's goal, provides a scrolling list of all donors and is projected onto the screen to encourage giving during the church service
- All of the donor data and donation data filters into the 360 degree donor view in Dynamics 365
- A Default Email Note is sent to each donor to the campaign which has the 501(c)(3) tax acknowledgement language necessary for donor receipts

Key Usage Summary

Volunteer Management

- Create Volunteer Events
- Branded Custom Volunteer Sign-up Pages
- Run Volunteer Events
- Track and Manage Volunteer Attendance
- Accept Donations from Volunteers as They Sign Up
- Empower Volunteers to Donate If They Are Unable to Participate (Passive Fundraising)
- Volunteer Activity and Trends Reporting

Usage Scenario

Tree-Planting Volunteer Event

Community Works, a local nonprofit organization, mobilizes volunteers to plant trees each spring.

- Community Works creates a branded and compelling volunteer page within BetterUnite that offers specific jobs (planting, watering, fertilizing, etc) in delineated shifts to identified volunteers and donors
- The organization then pulls a list of likely volunteers from their donor management tools and sends an email sign-up ask to them
- There is a passive fundraising "ask" associated with the sign-up: "If you are unable to volunteer, please consider giving to this effort" with predefined amounts suggested
- Volunteers, as they sign up, are also encouraged to give monetarily to the effort on the page through passive fundraising asks
- Community Works also shares the sign-up page on social media, which acts as both a volunteer recruitment effort as well as marketing the effectiveness and activities of the organization
- All donations and volunteer sign-ups filter into donor management tool
- Community Works can pull reports around volunteer activities and engagement after the volunteer event

Key Usage Summary

Donor Management

- Donor Management Built on Dynamics 365 Nonprofit Accelerator
- 360-degree donor view
- Donation History Tracking
- Offline Donations
- Take Payments
- Search by Donations
- Ticket and Perk Purchase History
- Donation Reporting
- View Engagement for Donors
- Track Activity History
- Track SMS Communications
- Auto-logged Activities

Usage Scenario

Nonprofit Donor Management with Dynamics 365

Community Works, a local nonprofit organization with a $10 million annual budget, uses BetterUnite fundraising tools with Dynamics 365 Donor Management

- Community Works needs to understand giving trends among its 5,000+ donors and contacts

- They look to BetterUnite and Dynamics 365 Nonprofit Accelerator to make information around individual donors giving history digestable and dynamic

- Their development team regularly pulls reports based on Last Gift, Largest Gift, age, industry and tags, among other search parameters

- The development team also pulls lists for email marketing based around event participation or ticket purchasing

- The filter down of information and 360 degree donor view reduce data migration or entry need

Let's Go Do Some Good.

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