



# 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:

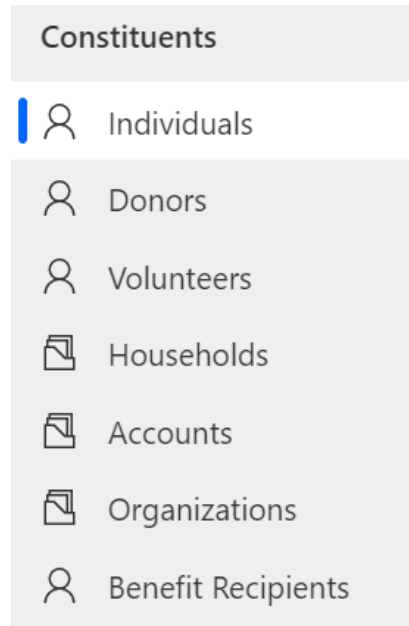
1. **Fundraiser:** The Fundraiser will use the system to facilitate constituent management and execute fundraising.
2. **Award Manager:** The Award Manager will use the solution to facilitate constituent management and manage awards.
3. **Program Manager:** The Program Manager will use the solution to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

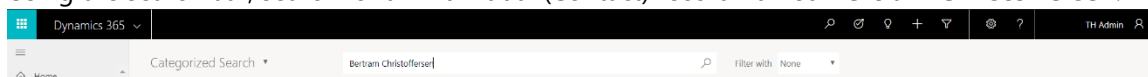
Any organization with which a nonprofit has a relationship. The entity may be a corporation, foundation, etc. Organizations are Accounts.

### Benefit Recipients

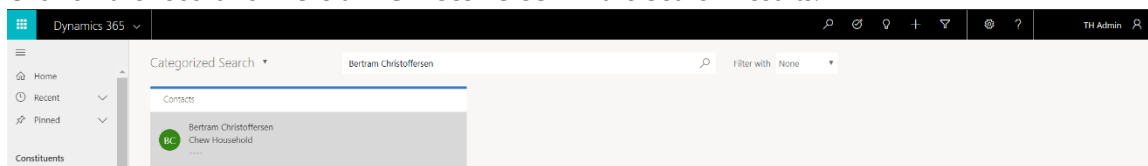
Any person or entity that is the recipient of the benefit of a nonprofit's activities.

## View Individual

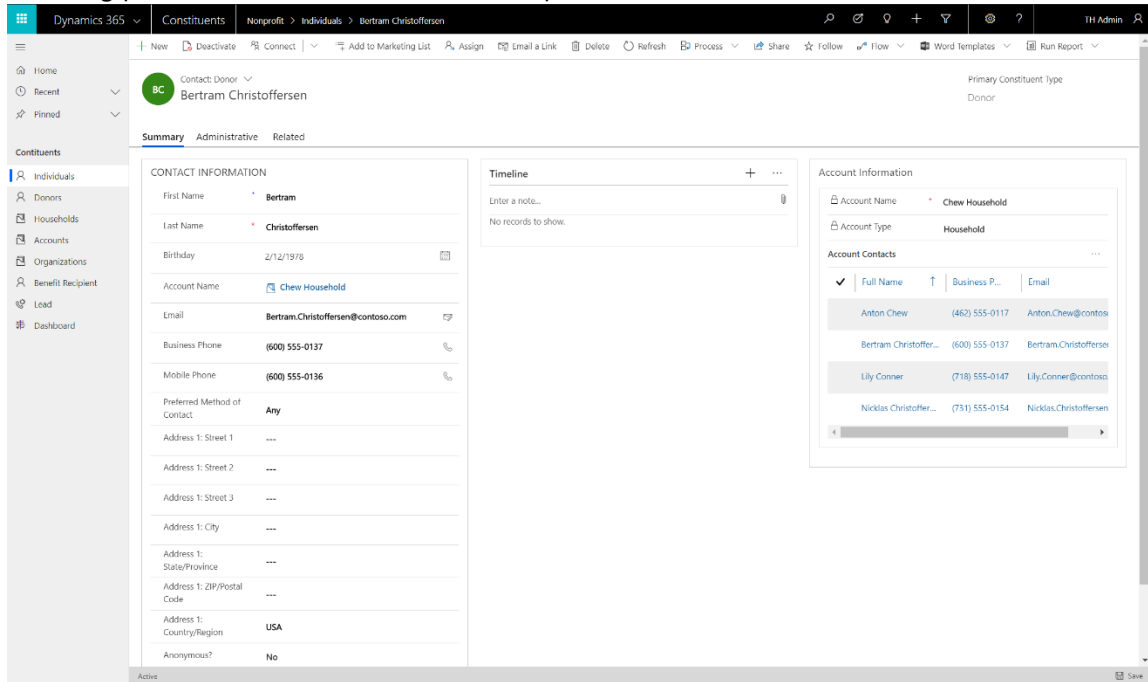
1. Using the search bar, search for an Individual (Contact) record named **Bertram Christoffersen**.



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.



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

- Header:** Displays the constituent's name, contact type (Donor), and primary constituent type (Donor).
- Summary Tab:** The active tab, showing contact information and account details.
- Contact Information:**
  - 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
  - Address 1: Street 1, Street 2, Street 3, City, State/Province, ZIP/Postal Code, Country/Region (USA), Anonymous? No
- Timeline:** A section for notes and history, currently empty.
- Account Information:**
  - Account Name: Chew Household
  - Account Type: Household
  - Account Contacts: A list of contacts associated with the household, including Anton Chew, Bertram Christoffersen, Lily Conner, and Niklas Christoffersen.

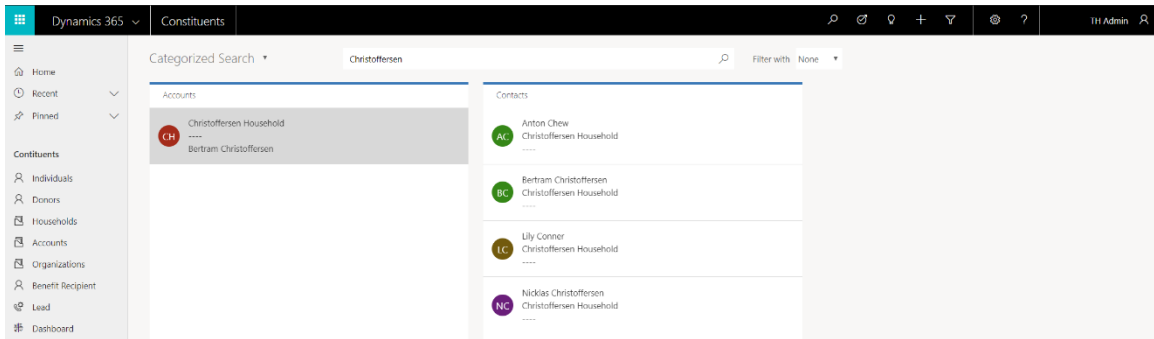
4. Bertram's Household Information is available on the right side of the profile. Bertram is a member of the Chew Household, along with three other individual Contacts (Anton Chew, Lily Conner and Niklas Christoffersen).
5. Individual profiles include the following components, enabling complete profiling 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

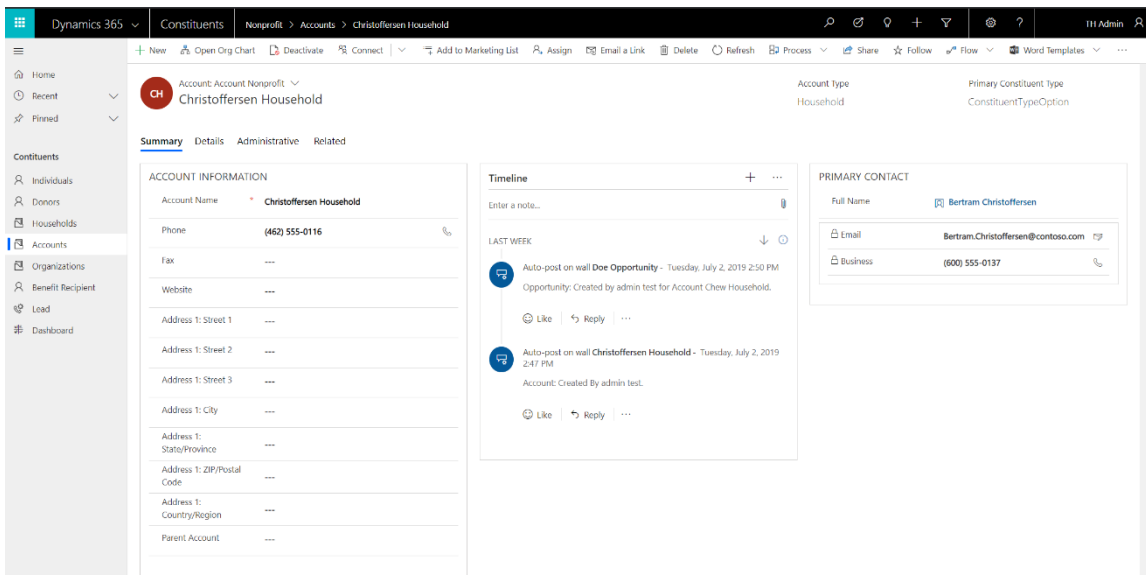
1. Using the search bar, search for a Household (Account) record named **Christoffersen Household**.



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

- 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.
- Navigate to the **Constituents** sample application and select **Benefit Recipient** in the left navigation.

Name	Description	Beneficiary Recipient Type	Beneficiary	Resource Catalog	Parent Beneficiary 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	---	---

- 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.
- 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 Beneficiary Recipient: ---

Beneficiary 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."

**BENEFIT RECIPIENT**  
Contoso School

Parent Benefit Recipient: ---    Benefit Recipient Type: Account    Status: Active

**General**   Administrative   Related

Name	Contoso School
Description	---
Beneficiary	Contoso School
Resource Catalog	---

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."

**BENEFIT RECIPIENT**  
Contoso Beach

Parent Benefit Recipient: ---    Benefit Recipient Type: Other    Status: Active

**General**   Administrative   Related

Name	Contoso Beach
Description	Beach
Beneficiary	Friends of Contoso Beach
Resource Catalog	Beach

## View Organization

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

**Dynamics 365**   Constituent

Categorized Search   contoso   Filter with: None

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

**Dynamics 365**   Constituent

Categorized Search   contoso   Filter with: None

Accounts	Contacts
<p>Contoso School</p> <p>Contoso Suites</p> <p><b>Contoso, Ltd.</b></p>	<p>Betty Welch</p> <p>Chinatsu Sakai</p> <p>Heung-Chul Yoon</p> <p>Rafael Viera</p>

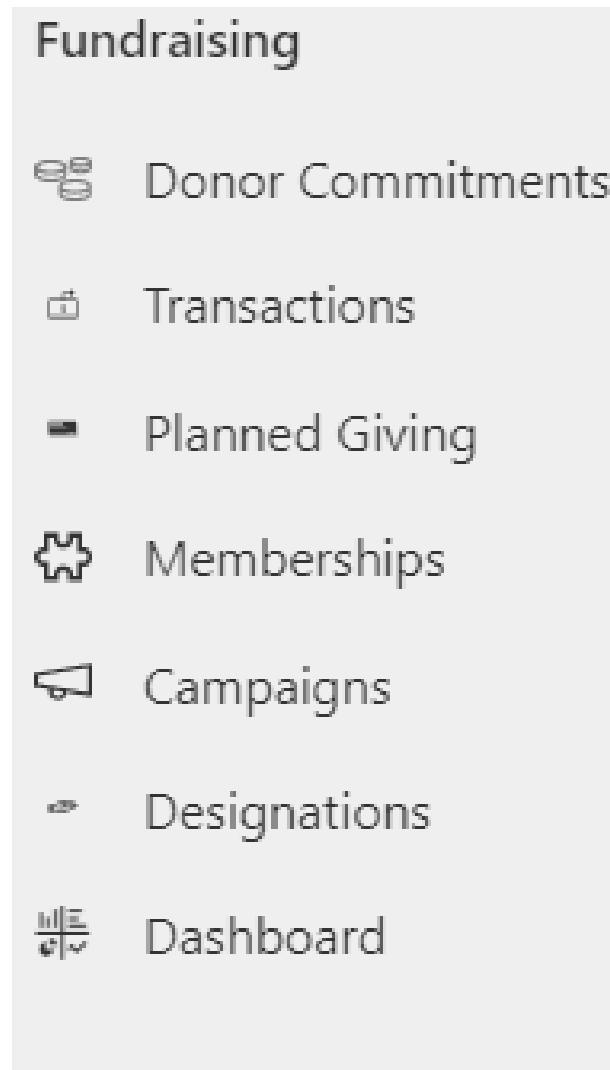
3. View the Organization Profile Page for **Contoso, Ltd.** This Organization has a Primary Contact, Bertram Christoffersen, as identified by the Primary Contact. Profile information about the Organization is available including phone, email, website and address details.

The screenshot displays the Microsoft Dynamics 365 Nonprofit Accelerator interface. The top navigation bar shows 'Dynamics 365' and 'Nonprofit > Accounts > Contoso, Ltd.'. The left sidebar contains navigation options: Home, Recent, Filtered, Constituents, Individuals, Donors, Households, Accounts (selected), Organizations, Beneficiary Recipient, Lead, and Dashboard. The main content area is titled 'Contoso, Ltd.' and includes tabs for Summary, Details, Administrative, and Related. The 'Summary' tab is active, showing 'ACCOUNT INFORMATION' with fields for Account Name (Contoso, Ltd.), Phone, Fax, Website (https://www.contoso.com), and Address 1 (Street 1: Østervej 48, City: Glumsø, State/Province: Region Sjælland, ZIP/Postal Code: 4171, Country/Region: DNK). A 'Timeline' section shows a post from 'LAST WEEK' dated Tuesday, July 2, 2019, 2:47 PM, with the text 'Auto-post on wall Contoso, Ltd. Account Created By admin test.' and options to Like, Reply, or Add a note. A 'PRIMARY CONTACT' section lists 'Full Name: Bertram Christoffersen', 'Email: Bertram.Christoffersen@contoso.com', and 'Business: (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

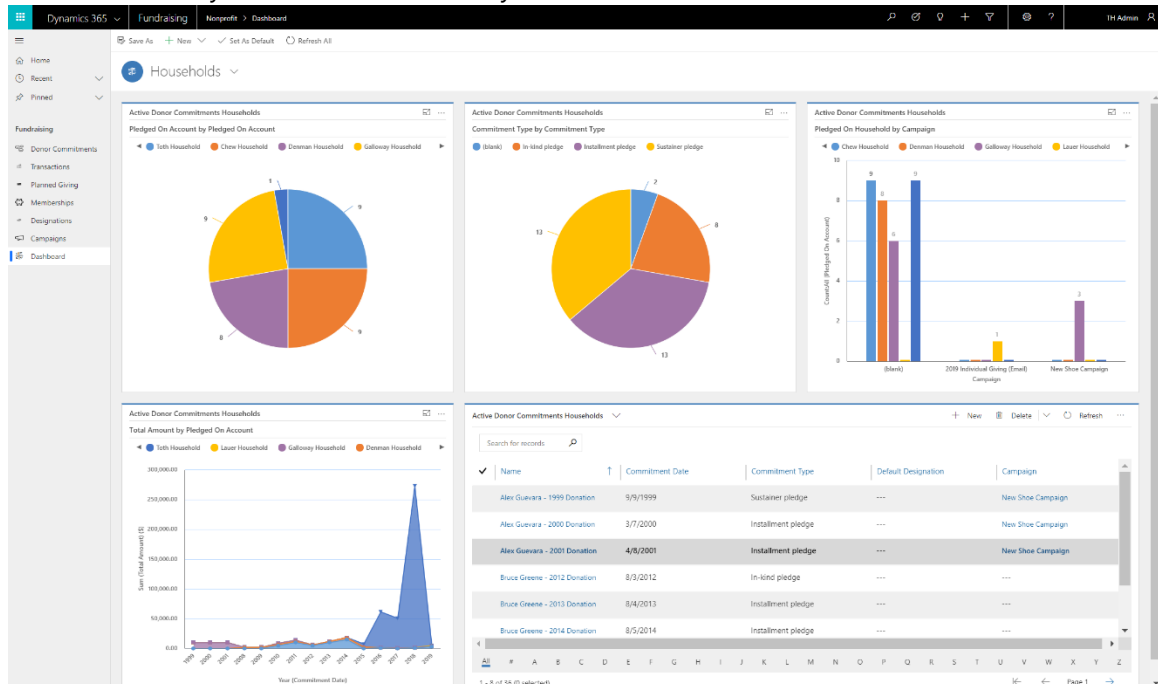
Container for constituent engagement activities and responses and lists to create, plan, execute, and track the results of a specific marketing campaign through its life.

### 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.

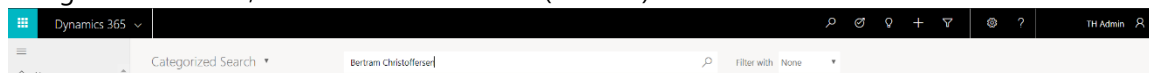
## View Fundraising Dashboard

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

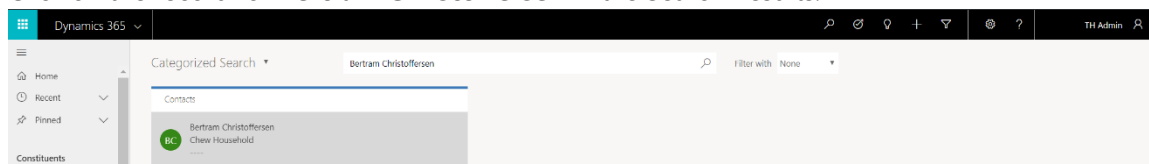


## View Donor Commitment

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.



# Microsoft Nonprofit Accelerator Walkthrough



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.

The screenshot shows the Individual Profile Page for Bertram Christoffersen. The page is divided into several sections: CONTACT INFORMATION, Timeline, and Account Information. The CONTACT INFORMATION section includes fields for 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), Address 1 (Street 1, Street 2, Street 3, City, State/Province, ZIP/Postal Code, Country/Region: USA), and Anonymous? (No). The Timeline section is currently empty. The Account Information section shows the Account Name (Chew Household) and Account Type (Household). Below this, there is a list of Account Contacts with columns for Full Name, Business P..., and Email. The contacts listed are Anton Chew, Bertram Christoffer..., Lily Conner, and Nicklas Christoffer....

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.

The screenshot shows the Donor Commitments view for Bertram Christoffersen. The view displays a table of Donor Commitment records. The table has columns for Name, Commitment Date, Commitment Type, Default Designation, and Campaign. There are three records shown: Christoffersen - 2016 Donation (1/3/2016, Installment pledge, Restricted (Advocacy)), Christoffersen - 2019 Donation (1/5/2019, Installment pledge, Restricted (Education)), and Christoffersen - 2018 Donation (1/4/2018, In-kind pledge, General Operating (Unrestricted)).

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)	---

# Microsoft Nonprofit Accelerator Walkthrough



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:

Dynamics 365 | Nonprofit > Designations > Restricted (Education)

DESIGNATION  
Restricted (Education)

General Administrative Related

Name: Restricted (Education)

Designation Code: RES-ED

Designation Group: NFP

Parent Designation: ---

Description: Funds are restricted for education-related

Endowment Type: EndowmentType

Start Date: 1/1/2019

End Date: 12/31/2019

Is Active: No

Restriction Type: ---

Total Disbursed: \$25,550.00

Currency: US Dollar

Exchange Rate: 1.0000000000

Acknowledgement Name: ACK-EDU19-001

Initiative: 2

Program: Education

GL Credit Account: 123-456

GL Debit Account: 654-321

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.

Dynamics 365 | Constituents > Nonprofit > Individuals > Bertram Christoffersen >> Restricted (Education)

DESIGNATION  
Restricted (Education)

General Administrative **Connections** Related

Connect Refresh Run Report Excel Templates Export Connections

Active Connection Associated View

Search for records

Connected To	Role (to)	Description
Health Education Initiatives	Designation to Delivery Framework	This restricted designation is for health education initiatives in the region.

1 - 1 of 1 (0 selected)



## View Planned Gift

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

Name	Account	Campaign	Affiliation	External ID
Request \$125,000 (Simos)	Humongous Insurance	2019 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 (Jangedland)	Wilcox Household	2019 FY19 Q2 Planned Giving	NGO	---
Trust \$50,000 (Simios)	Sarkozi Household	2019 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.

**PLANNED GIVING**  
Trust \$50,000 (Simios)

Record Type: --- Account: [Sarkozi Household](#)

**General** Details Trust Giving Insurance Deceased Related

Name	Trust \$50,000 (Simios)
Account	<a href="#">Sarkozi Household</a>
Affiliation	---
Campaign	<a href="#">2019 FY19 Q2 Planned Giving</a>
External ID	---
Currency	<a href="#">US Dollar</a>
Exchange Rate	1.000000000000
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

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

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:

### Awards

-  Objectives
-  Delivery Frameworko...
-  Budgets
-  Dockets
-  Inquiries
-  Recommendations
-  Requests
-  Awards
-  Reviews
-  Reports
-  Dashboard

### 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

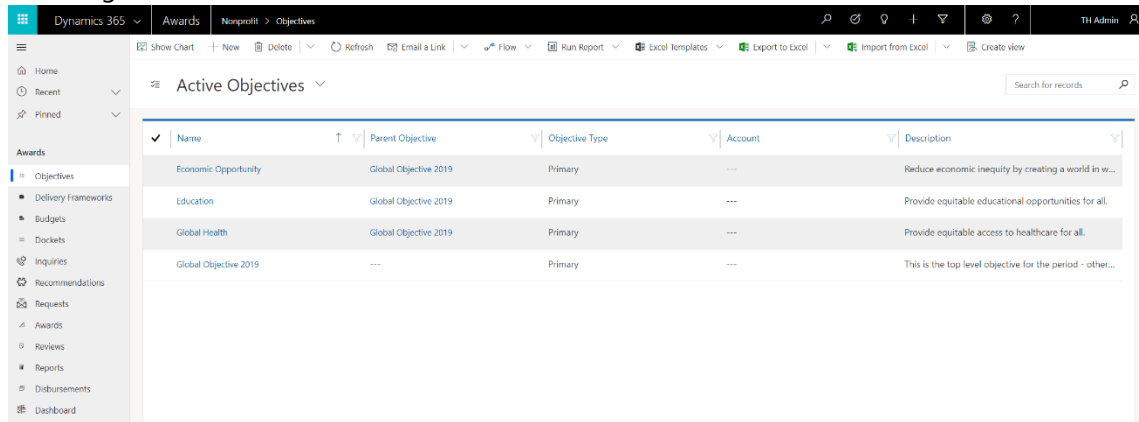
An agreement to provide or receive funding or support.

### 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 Microsoft Dynamics 365 Awards application. The left navigation pane is open, showing the 'Awards' section with 'Objectives' selected. The main area displays the 'Active Objectives' view, which contains a table of objectives.

Name	Parent Objective	Objective Type	Account	Description
Economic Opportunity	Global Objective 2019	Primary	---	Reduce economic inequity 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:

The screenshot shows the Dynamics 365 Awards page for the 'Global Health' objective. The objective is 'Global Health', its type is 'Primary', and its parent objective is 'Global Objective 2019'. The description is 'Provide equitable access to healthcare for all.' The start date is 1/1/2019 and the end date is 12/31/2019.

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

The screenshot shows the 'Global Health' objective page with the 'Related' tab selected. A dropdown menu is open, showing the following options: Activities, Connections, Audit History, Budgets, Child Objectives, and Delivery Frameworks. The 'Delivery Frameworks' option is highlighted.

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:

The screenshot shows the Dynamics 365 Awards page for the 'Global Health' objective, with the 'Delivery Frameworks' tab selected. The page displays a table of delivery frameworks associated with the objective.

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

The table shows 3 records. The first record, 'Health Education Initiatives', is selected. The page also includes a search bar and a 'Delivery Framework Associated View' dropdown.

- 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):

**DELIVERY FRAMEWORK**  
Health Education Initiatives

Parent Delivery Framework: ---  
Delivery Framework Type: Project  
Status: Implementation

**General** | Goal Information | IATI | Administrative | Related

Name: Health Education Initiatives  
Account: Contoso, Ltd.  
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  
Description: Working with local partners throughout the region to develop training and education services around health in a community environment.

**Timeline**  
Enter a note...  
No records to show.  
Filter by (Click To Filter)  
By record type  
All  
Show more filters

- 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.

**DELIVERY FRAMEWORK**  
Health Education Initiatives

Parent Delivery Framework: ---  
Delivery Framework Type: Project  
Status: Implementation

**General** | Goal Information | IATI | Administrative | **Disbursement Distributions** | Related

+ Add New Disbursement... | Add Existing Disbursement... | Refresh | Run Report | Excel Templates | Export Disbursement...

Disbursement Distribution Associated View

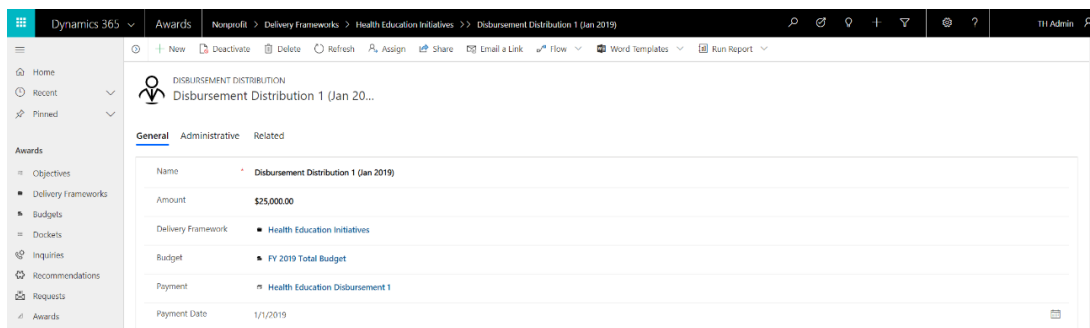
Search for records

Name	Created On
Disbursement Distribution 1 (Jan 2019)	7/2/2019 3:03 PM
Disbursement Distribution 2 (March 2019)	7/2/2019 3:03 PM

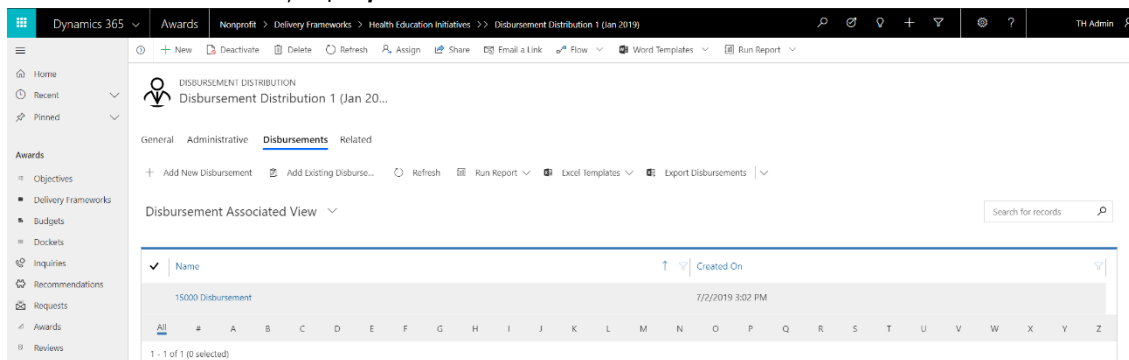
All | 1 - 2 of 2 (0 selected)

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

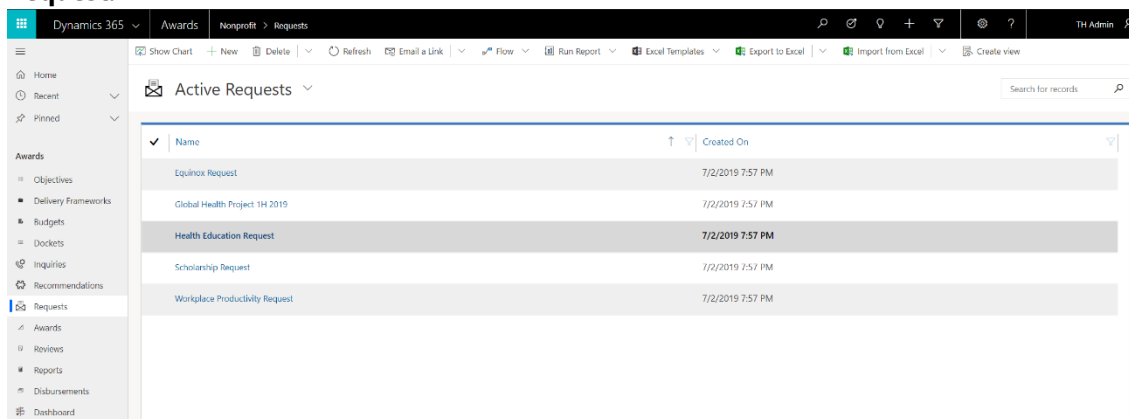
# Microsoft Nonprofit Accelerator Walkthrough



- 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:

**REQUEST**  
Health Education Request

Request Type: General  
Stage: Awarded

**General** Administrative Related

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
Amount Requested	\$50,000.00	Fiscal Sponsor	Christoffersen Household
Amount Recommended	\$30,000.00	Renewal of Award	Health Education
Amount Projected	\$65,000.00	Conflict of Interest Detail	Employed member
Total Project Budget	\$150,000.00	Conflict of Interest Status	Board Member
		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.

**AWARD**  
Health Education

Request: Health Education Re...  
Type: General Support

**General** Award Version Disbursements Reports Administrative Related

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

**Timeline**

Enter a note...

Filter by (Click To Filter)  
By record type  
All  
Show more filters

No records to show.

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



Dynamics 365 Awards Nonprofit > Awards > Health Education

Home Recent Firmed

Awards

- Objectives
- Delivery Frameworks
- Budgets
- Dockets
- Inquiries
- Recommendations
- Requests

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:

**DISBURSEMENT**  
Health Education Disbursement 1

**General** | **ATI** | **Administrative** | **Related**

Name	Health Education Disbursement 1	Recipient Contact	---
Adjustment	---	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.

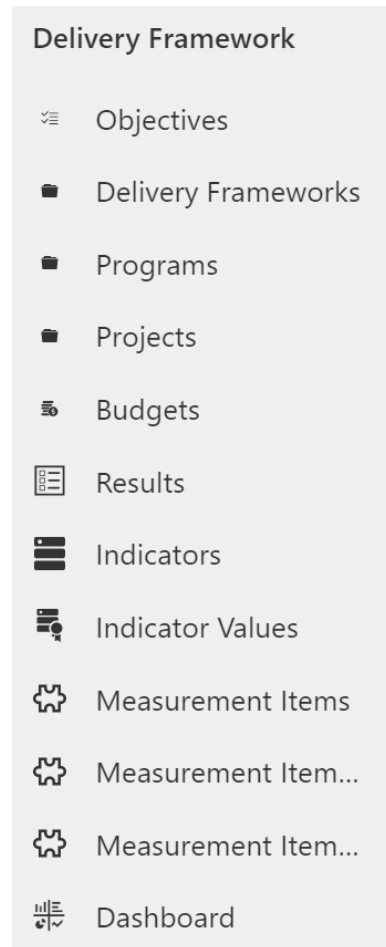
**DISBURSEMENT DISTRIBUTION**  
Disbursement Distribution 1 (Jan 2019)

**General** | **Administrative** | **Related**

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.

# Microsoft Nonprofit Accelerator Walkthrough

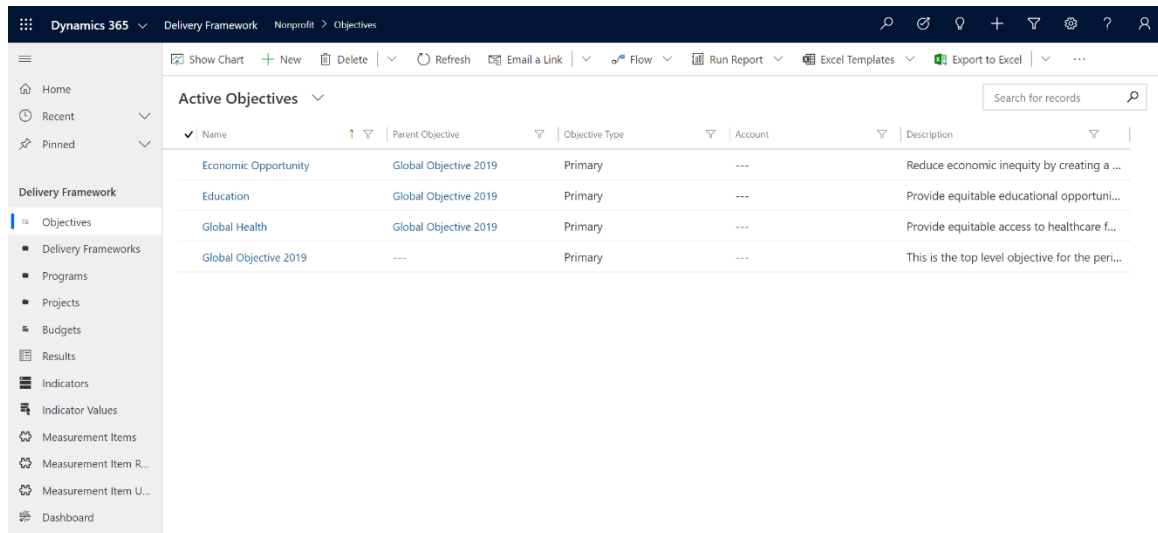


## Benefit Recipients

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

## Program Delivery

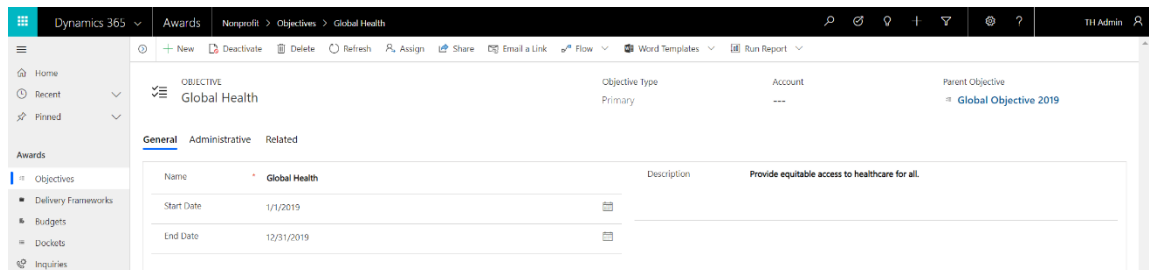
1. Navigate to the **Delivery Framework** Sample Application, view the **Objectives**:



The screenshot shows the Dynamics 365 Nonprofit interface. The left navigation pane is open, showing the 'Delivery Framework' section with 'Objectives' selected. The main area displays a table of 'Active Objectives'.

Name	Parent Objective	Objective Type	Account	Description
Economic Opportunity	Global Objective 2019	Primary	---	Reduce economic inequity by creating a ...
Education	Global Objective 2019	Primary	---	Provide equitable educational opportuni...
Global Health	Global Objective 2019	Primary	---	Provide equitable access to healthcare f...
Global Objective 2019	---	Primary	---	This is the top level objective for the per...

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



The screenshot shows the details of the 'Global Health' objective in Dynamics 365 Nonprofit. The left navigation pane is open, showing the 'Awards' section with 'Objectives' selected. The main area displays the 'Global Health' objective details.

Name	Objective Type	Account	Parent Objective
Global Health	Primary	---	Global Objective 2019

**General** | Administrative | Related

Name	Description
Global Health	Provide equitable access to healthcare for all.

Start Date: 1/1/2019  
End Date: 12/31/2019

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

# Microsoft Nonprofit Accelerator Walkthrough



## Global Health Objective

**General** Administrative Related

Name *	<b>Related - Common</b> <ul style="list-style-type: none"><li>Activities</li><li>Connections</li><li>Audit History</li><li>Budgets</li><li>Measurement Item Usages</li><li>Child Objectives</li><li>Delivery Frameworks</li></ul>
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 left sidebar contains navigation options like Home, Recent, Pinned, and a list of entities including Delivery Frameworks, Programs, Projects, Budgets, Results, Indicators, and Measurement Items. The main area displays the 'Global Health' Objective with tabs for General, Administrative, Delivery Frameworks, and Related. The 'Delivery Frameworks' tab is active, showing a table of associated frameworks.

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 details of the 'Health Education Initiatives' Delivery Framework. The left sidebar is the same as the previous screenshot. The main area displays the 'Health Education Initiatives' Delivery Framework with tabs for General, Goal Information, Administrative, and Related. The 'General' tab is active, showing a form with fields for Name, Account, Region, Country, Scope, Planned Start Date, and Planned End Date. The 'Scope' field is set to 'National'. The 'Planned Start Date' is 1/1/2019 and the 'Planned End Date' is 6/30/2019. The 'Description' field contains the text: 'Working with local partners throughout the region to develop training and education'. The 'Timeline' section on the right 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 left sidebar contains a navigation menu with options like Home, Recent, Pinned, and various data views. The main area displays the 'Measurement Item Usage' view, which includes a table with columns for Name, Measurement Item, Delivery Framework, Result, Indicator, and Objective. The table shows one record: 'Ensure healthy lives and promote well-being for all at all ages' linked to '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 left sidebar is the same as the previous screenshot. The main area displays the 'Results' view, which includes a table with columns for Name and Created On. The table shows two records: 'Q1 Training Delivery' and 'Q2 Training Delivery', both created on 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.

The screenshot shows the Dynamics 365 interface for configuring a 'Result'. The breadcrumb trail is: Dynamics 365 > Delivery Framework > Nonprofit > Results > Q1 Training Delivery. The left sidebar shows the 'Results' section selected. The main area displays the 'Q1 Training Delivery' result configuration. The 'Delivery Framework' is 'Health Education Initi...' and the 'Result Type' is 'Outcome'. The 'General' tab is active, showing the following details:

Name	Aggregation Status
Q1 Training Delivery	No

Below this, the 'Delivery Framework' is listed as 'Health Education Initiatives'. The 'Start Date' is 1/1/2019 and the 'End Date' is 3/31/2019.

- 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.

The screenshot shows the Dynamics 365 interface for configuring an 'Indicator'. The breadcrumb trail is: Dynamics 365 > Delivery Framework > Nonprofit > Indicators > # of Trainings Delivered. The left sidebar shows the 'Indicators' section selected. The main area displays the '# of Trainings Delivered' indicator configuration. The 'Result' is 'Q1 Training Delivery'. The 'General' tab is active, showing the following details:

Name	Start Date
# of Trainings Delivered	1/1/2019

Below this, the 'Ascending' status is 'Yes' and the 'End Date' is 3/31/2019. The 'Aggregation Status' is 'Yes'.



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

# of Trainings Delivered: ---  
Parent Indicator Value: ---

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

**General** | Description | Administrative | **Benefit Recipients** | Related

Add Existing Benefit R... Refresh Run Report Excel Templates Export Benefit Recipie...

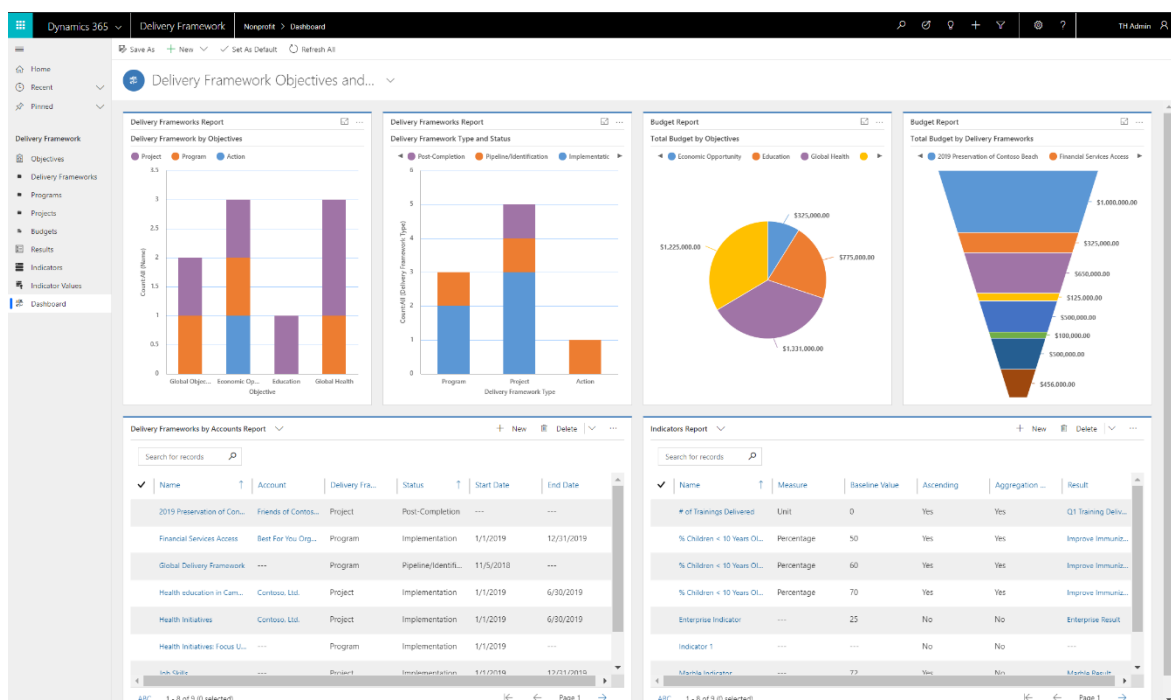
**Benefit Recipient Associated View**

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

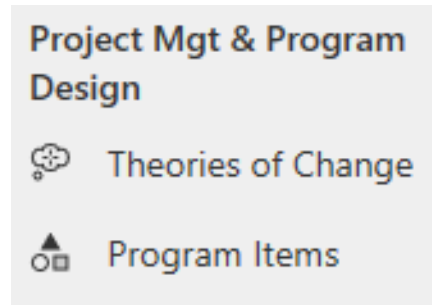
1. Navigate to the **Delivery Framework** Sample Application, select **Dashboard** in the left navigation. The sample **Delivery Framework Objectives and Results** dashboard displays several key insights:
  - a. Delivery Frameworks by Objective
  - b. Delivery Framework by Type and Status
  - c. Total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

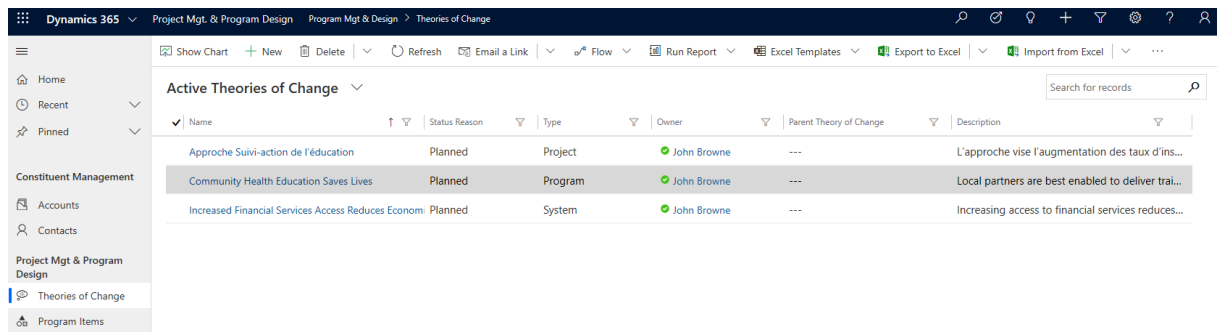
Theories of Change are hypotheses for achieving a desired social impact and are comprised of a sequence of cause-and-effect actions or occurrences.

### 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.

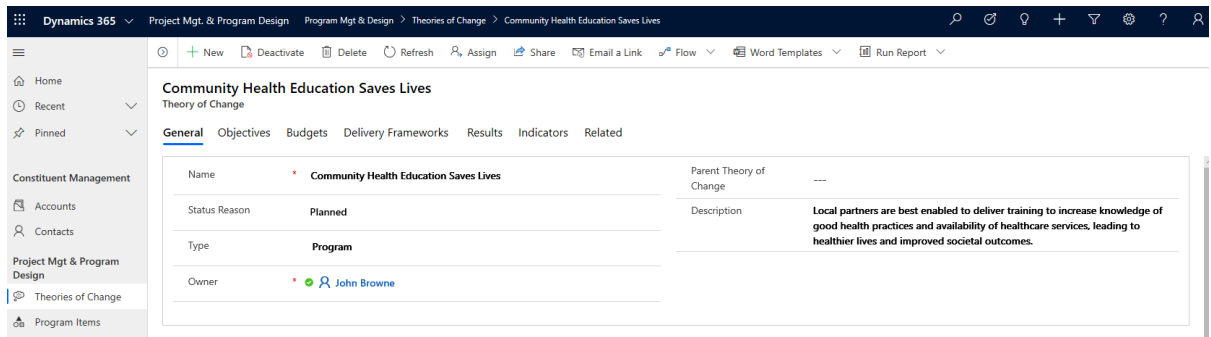
## Sample Theory of Change

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



Name	Status Reason	Type	Owner	Parent Theory of Change	Description
Approche Suivi-action de l'éducation	Planned	Project	John Browne	---	L'approche vise l'augmentation des taux d'ins...
Community Health Education Saves Lives	Planned	Program	John Browne	---	Local partners are best enabled to deliver trai...
Increased Financial Services Access Reduces Econom	Planned	System	John Browne	---	Increasing access to financial services reduces...

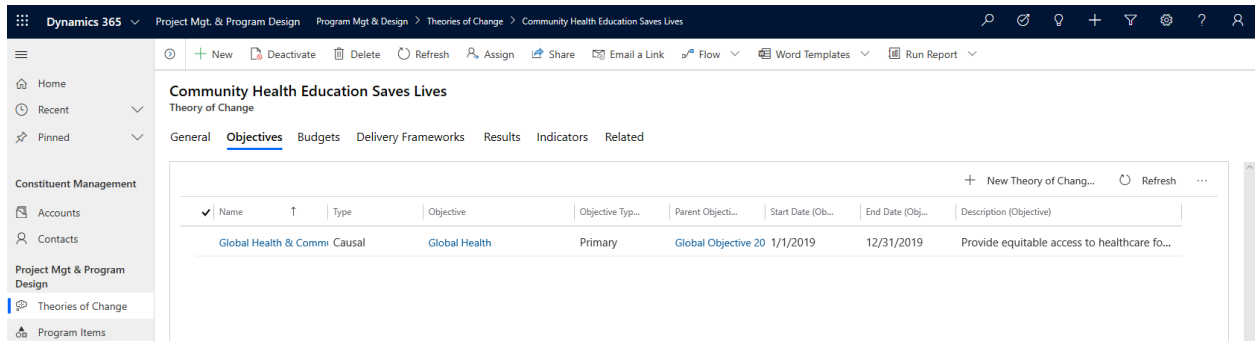
2. Select the **Community Health Education Saves Lives** Theory of Change, which corresponds to a planned program (denoted by the Status Reason and Type), and is summarized in the description that "Local partners are best enabled to deliver training to increase knowledge of good health practices and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



The screenshot shows the Dynamics 365 interface for the 'Community Health Education Saves Lives' Theory of Change record. The 'General' tab is selected, displaying fields for Name, Status Reason, Type, and Owner. The 'Objectives' tab is also visible in the top navigation bar.

Name	Status Reason	Type	Owner	Parent Theory of Change	Description
Community Health Education Saves Lives	Planned	Program	John Browne	---	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.

- 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.



The screenshot shows the Dynamics 365 interface for the 'Community Health Education Saves Lives' Theory of Change record, with the 'Objectives' tab selected. The table displays a list of objectives, including their names, types, and descriptions.

Name	Type	Objective	Objective Typ...	Parent Objecti...	Start Date (Ob...	End Date (Obj...	Description (Objective)
Global Health & Comm	Causal	Global Health	Primary	Global Objective 20	1/1/2019	12/31/2019	Provide equitable access to healthcare fo...

- 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.

# Microsoft Nonprofit Accelerator Walkthrough



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

**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	---	---
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...	---

1 - 4 of 14 (0 selected)

Refresh | Run Report | Excel Templates | Export Program Items | See all records

- 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	---	1
Ensure all trainers are local to context of trainin	High	Decision	Resource	Monitoring	1/25/2019	---	---	Planned	---	2
Lack of attendee confirmation pre-sessions dec	Medium	Risk	---	---	---	---	---	Planned	---	3
Local trainer with existing relationship improves	High	Observation	Resource	Execution	1/24/2019	Delivery Fram...	---	Planned	---	4
Quarterly Report (Q1) Due to Contoso, Ltd. 201	High	Obligation	---	Execution	4/15/2019	---	4/15/2019	Planned	3/15/2019	5
Quarterly Report (Q2) Due to Contoso, Ltd. 201	High	Deliverable	---	Execution	7/15/2019	---	7/15/2019	Planned	6/15/2019	6
Status Report 1 - 2019/01	Low	Deliverable	---	Monitoring	2/15/2019	---	2/15/2019	Planned	1/15/2019	7
Status Report 2 - 2019/02	Low	Deliverable	---	Monitoring	3/15/2019	---	3/15/2019	Planned	2/15/2019	8
Status Report 3 - 2019/03	Low	Deliverable	---	Monitoring	4/15/2019	---	4/15/2019	Planned	3/15/2019	9
Status Report 4 - 2019/04	Low	Deliverable	---	Monitoring	5/15/2019	---	5/15/2019	Planned	4/15/2019	10
Status Report 5 - 2019/05	Low	Deliverable	---	Monitoring	6/15/2019	---	6/15/2019	Planned	5/15/2019	11
Status Report 6 - 2019/06	Low	Deliverable	---	Monitoring	7/15/2019	---	7/15/2019	Planned	6/15/2019	12
Training participant gender must be at least 50%	High	Obligation	---	Monitoring	6/30/2019	---	6/30/2019	Planned	1/1/2019	13
Translation of local content to local context res	High	Assumption	---	Execution	1/24/2019	---	---	Planned	---	14

- 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**

Status Reason: **Planned**

Rating: **Medium**

Start Date: ---

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 left sidebar contains navigation options: Home, Recent, Pinned, Constituent Management (Accounts, Contacts), Project Mgt & Program Design (Theories of Change, Program Items), and Program Items. The main area displays the 'Program Items' tab for the program item 'Lack of attendee confirmation pre-sessions decreases participation'. The table below shows the data for this program item.

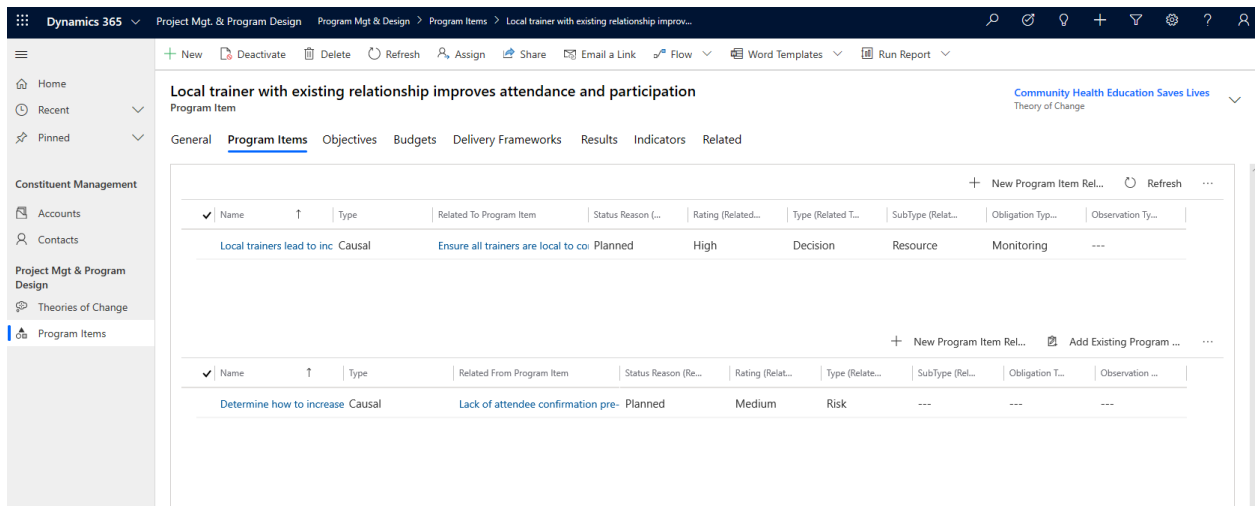
Name	Type	Related To Program Item	Status Reason	Rating	Type	SubType	Obligation Type	Observation Type
Determine how to increa	Causal	Local trainer with existing relatio	Planned	High	Observation	Resource	Execution	Delivery Frame...

- 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 left sidebar contains navigation options: Home, Recent, Pinned, Constituent Management (Accounts, Contacts), Project Mgt & Program Design (Theories of Change, Program Items), and Program Items. The main area displays the 'General' tab for the program item 'Local trainer with existing relationship improves attendance and participation'. The table below shows the data for this program item.

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

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.



The screenshot displays the Dynamics 365 interface for the '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 for Name, Type, Related To Program Item, Status Reason (Re...), Rating (Relat...), Type (Relate...), SubType (Relat...), Obligation Typ..., and Observation Ty....

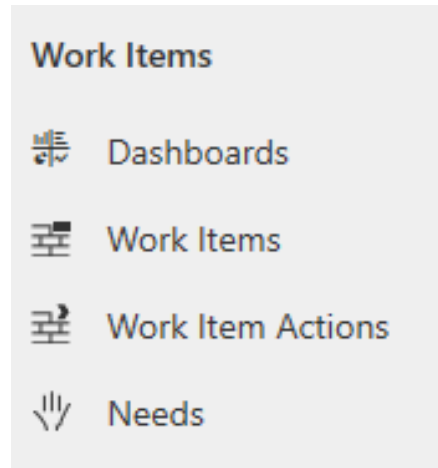
✓ Name	Type	Related To Program Item	Status Reason (Re...	Rating (Relat...	Type (Relate...	SubType (Relat...	Obligation Typ...	Observation Ty...
Local trainers lead to inc	Causal	Ensure all trainers are local to co	Planned	High	Decision	Resource	Monitoring	---

Below the first grid, there is a second grid with the same columns. It shows a 'Determine how to increase' item with a 'Causal' type, related to 'Lack of attendee confirmation pre-', with a 'Planned' status, 'Medium' rating, and 'Risk' type. The 'SubType' and 'Obligation' fields are empty, and the 'Observation' field contains '---'.



## 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

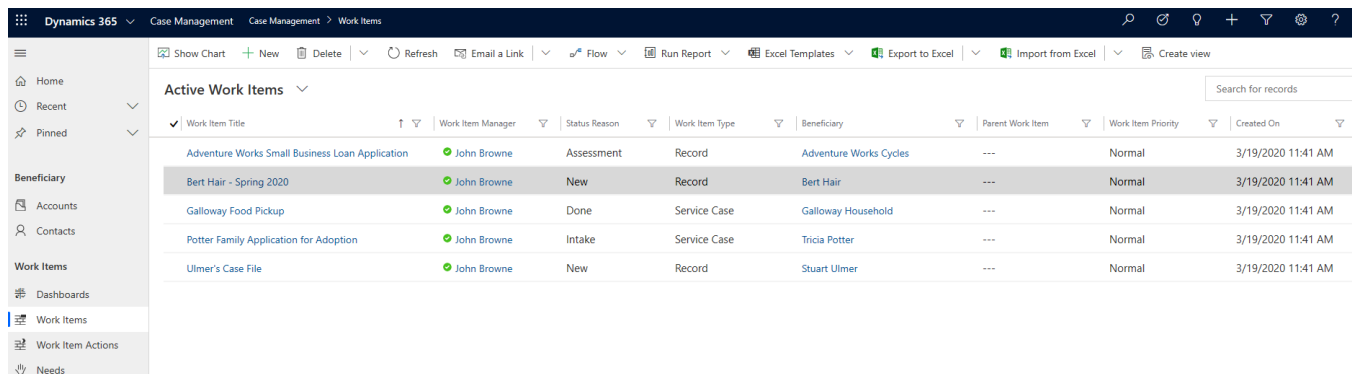
Work Item Actions are units of work that are assigned and tracked under a Work Item.

### 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**

Work Item Action Title	Status Reason	Work Item Action Type	Work Item Action Due Date	Created On
Job Skill Workshop	New	Appointment	3/17/2020	3/19/2020 11:41 AM
Skills Evaluation	New	Information	3/17/2020	3/19/2020 11:41 AM
Skills Assessment	Done	Information	3/13/2020	3/19/2020 11:41 AM
Intake	Done	Information	3/11/2020	3/19/2020 11:41 AM

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.

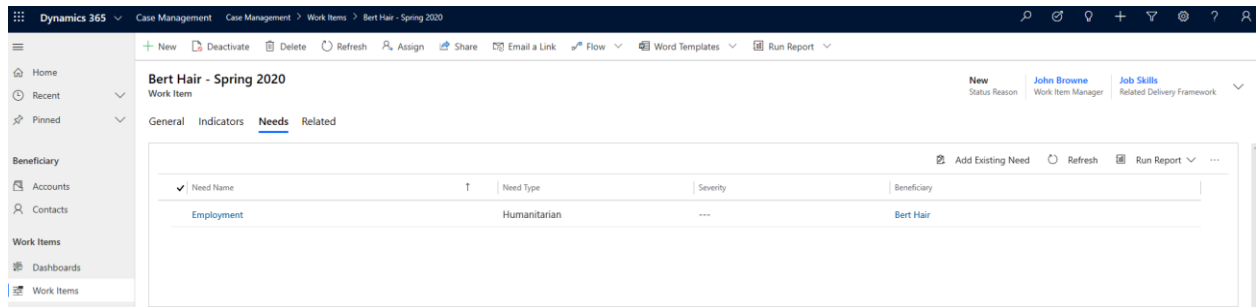
Work Item Action Title	Work Item	Beneficiary	Work Item Action Type	Work Item Action Due Date
Skills Evaluation	Bert Hair - Spring 2020	Bert Hair	Information	3/17/2020

**Description:** The instructor at the construction job skill workshop will provide an evaluation of Bert's skills after the workshop.

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



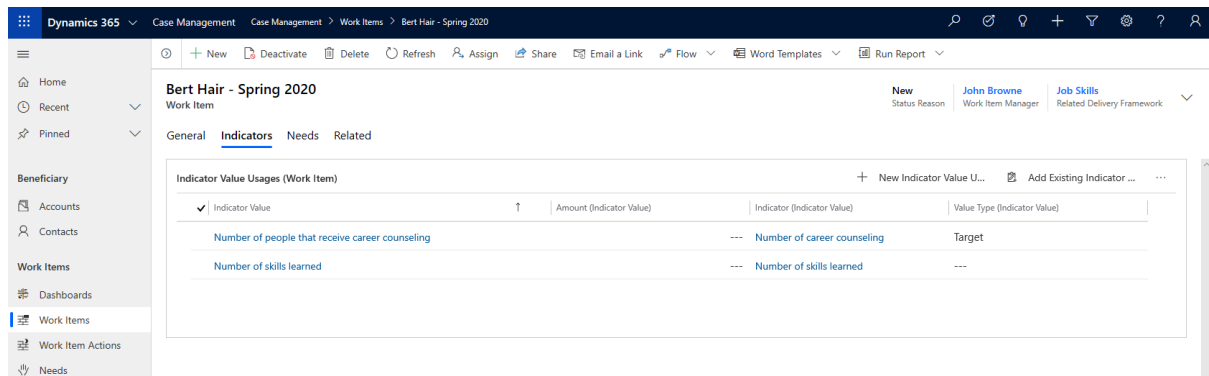
- To find out why Bert is in the system, click the **Needs** tab. Here, Bert's need for **Employment** is recorded.



The screenshot shows the Dynamics 365 interface for a case named 'Bert Hair - Spring 2020'. The 'Needs' tab is selected, displaying a table with the following data:

Need Name	Need Type	Severity	Beneficiary
Employment	Humanitarian	---	Bert Hair

- 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**.

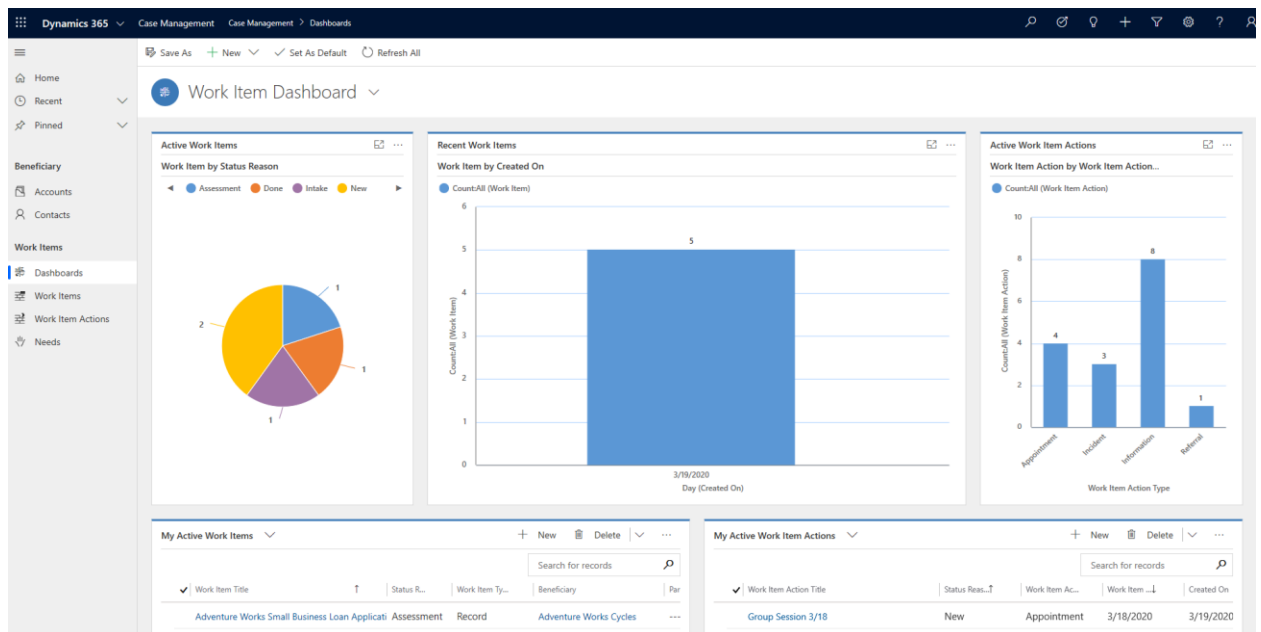


The screenshot shows the Dynamics 365 interface for the same case, but with the 'Indicators' tab selected. It displays a table titled 'Indicator Value Usages (Work Item)' with the following data:

Indicator Value	Amount (Indicator Value)	Indicator (Indicator Value)	Value Type (Indicator Value)
Number of people that receive career counseling	---	Number of career counseling	Target
Number of skills learned	---	Number of skills learned	---

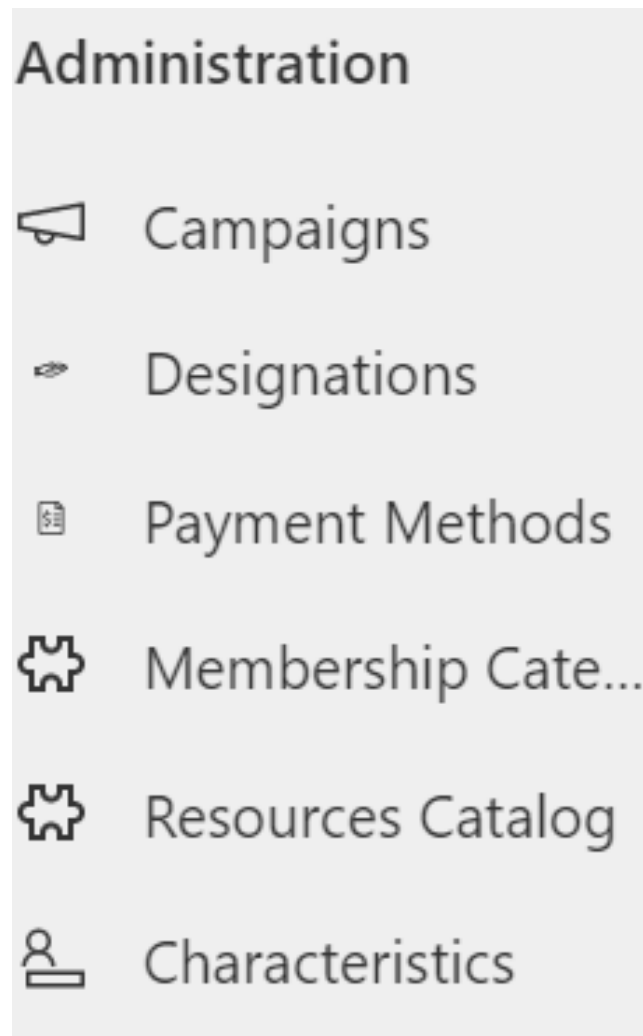
- In the left navigation, click **Dashboards** to view the Dashboard showing all the Active Work Items by Status Reason, Recent Work Items and Work Item Action by type.

# Microsoft Nonprofit Accelerator Walkthrough



## 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.