

Nonprofit Participant & Volunteer Management

Deliver Effective Programming
with Microsoft Cloud for Nonprofit



Let technology help you understand your donors, volunteers and supporters by:

- 1 Centralising donor and participant engagement
- 2 Gaining deeper insights
- 3 Improving communication effectiveness
- 4 Empowering teams to do more
- 5 Earning lifelong donors and support

Through the effective management of these time-consuming and complex activities:

Donor Engagement

Gabriella Morales - Saved
Contact

Donor
Primary Constituent Type

Summary Details Address Details Address Changes **Donation Information** Volunteer Engagement Administrative Related

Last Transaction Recurring - 438511 - Donation Instance Last Transaction Date 10/7/2020

Related Transactions

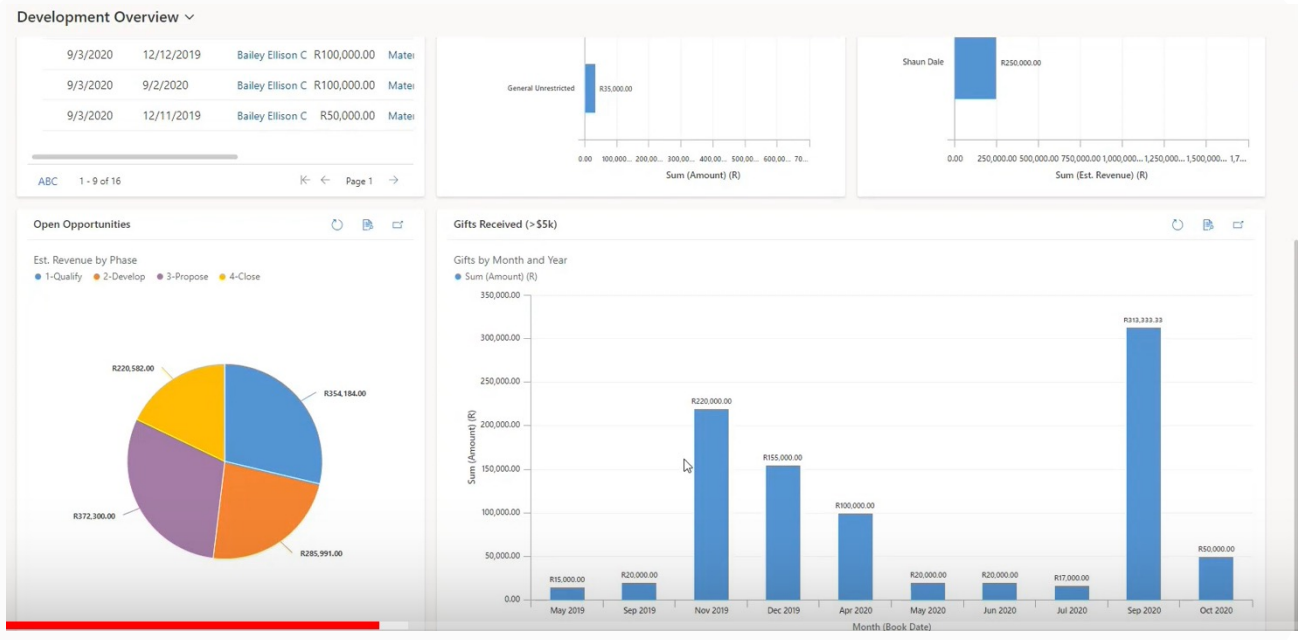
Received Date	Book Date	Donor	Amount	Primary Designation	Originating Campaign	Receipt #	Identifier	Payment Type
10/7/2020	10/7/2020	Gabriella Morales	R50.00	Maternal Health	Maternal Health		TRN-00001010	Check
10/7/2020	10/7/2020	Gabriella Morales	R500,000.00	Maternal Health	Maternal Health	FE100628	Donation - 29FD34	Cash
10/7/2020	10/7/2020	Gabriella Morales	R10.00	Maternal Health	Maternal Health		Recurring - 438511 - Donat...	Credit / Debit Card
10/7/2020	10/6/2020	Gabriella Morales	R500.00	Maternal Health	Maternal Health		Donation - 84A020	Cash

1 - 4 of 18

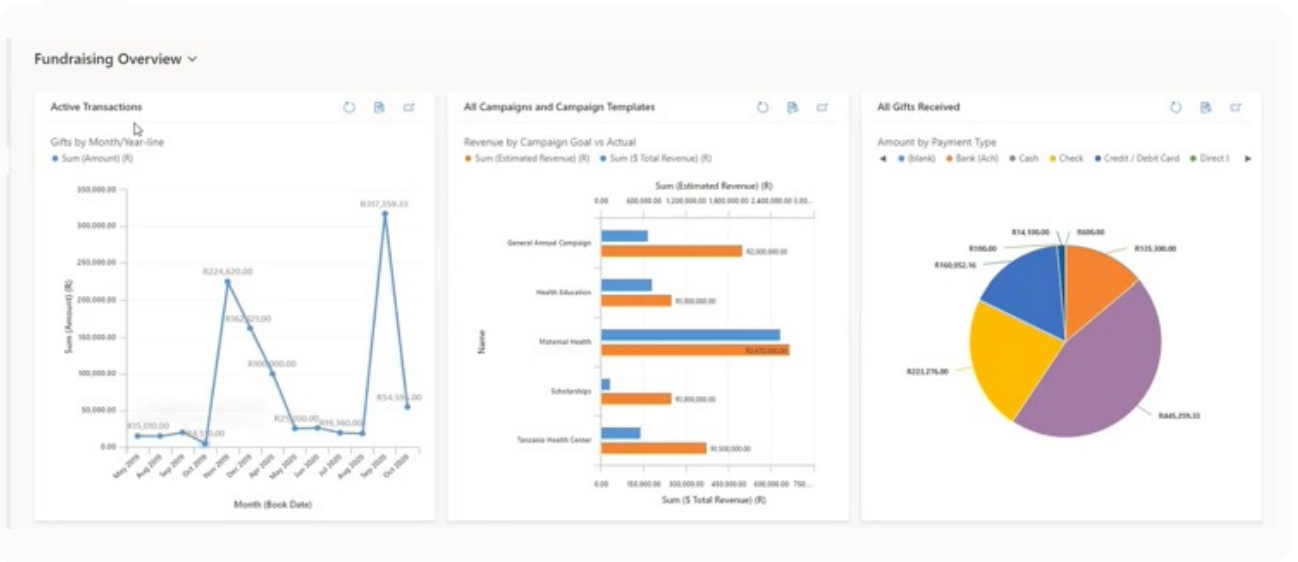
Donor Commitments (Donor)

Book Date	Donor	Total Amount Paid	Total Amount Balance	Primary Designation	Originating Campaign	Identifier	Status Reason
10/7/2024	Gabriella Morales	R0.00	R500,000.00	Maternal Health	Maternal Health	Pledge - 75FE87 Pledge Allocati...	Active
10/7/2023	Gabriella Morales	R0.00	R500,000.00	Maternal Health	Maternal Health	Pledge - 75FE87 Pledge Allocati...	Active
10/7/2022	Gabriella Morales	R0.00	R500,000.00	Maternal Health	Maternal Health	Pledge - 75FE87 Pledge Allocati...	Active
10/7/2021	Gabriella Morales	R0.00	R500,000.00	Maternal Health	Maternal Health	Pledge - 75FE87 Pledge Allocati...	Active

Opportunities



Pledges, gifts and payments



Memberships

Active Membership Groups

Display Name	Internal Display Name	Status Reason
A list of VIP memberships for purchase	VIP Membership	Active
Child Champion Membership	Child Champion	Active
Family and Group Memberships	Family and Group Memberships	Active
Select Here for Monthly Membership	Membership	Active
Single Membership	GROUP SINGLE	Active

Events & Campaigns

Tech for Nonprofit: Fundraising & Engagement - Saved

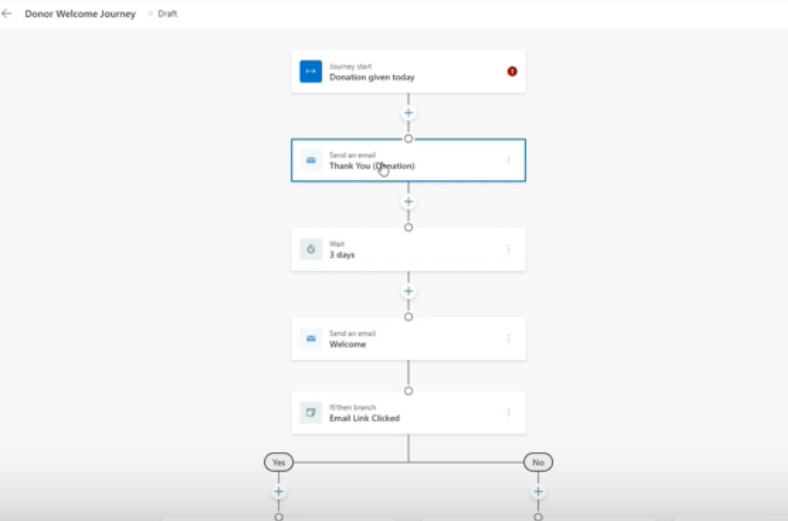
Active Status: Tania Camacho (Owner) | Live Publish status

Event Main Business Process: Active for 27 days

Progress: Preliminaries (✓) | Agenda (✓) | Organize (✓) | Promote (✓) | **Launch (11 Hrs)** | Post Event (○)

General | Agenda | Website and form | Registration and attendance | Additional information | Post event | Room reservations | Recovery Items | Related

Marketing Journeys

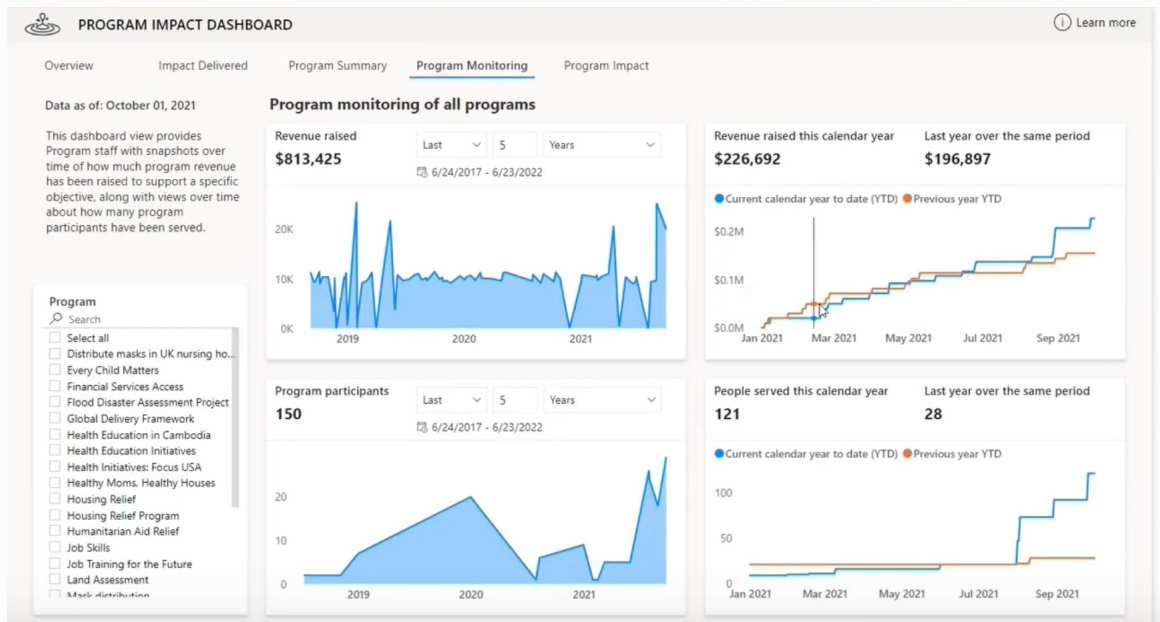


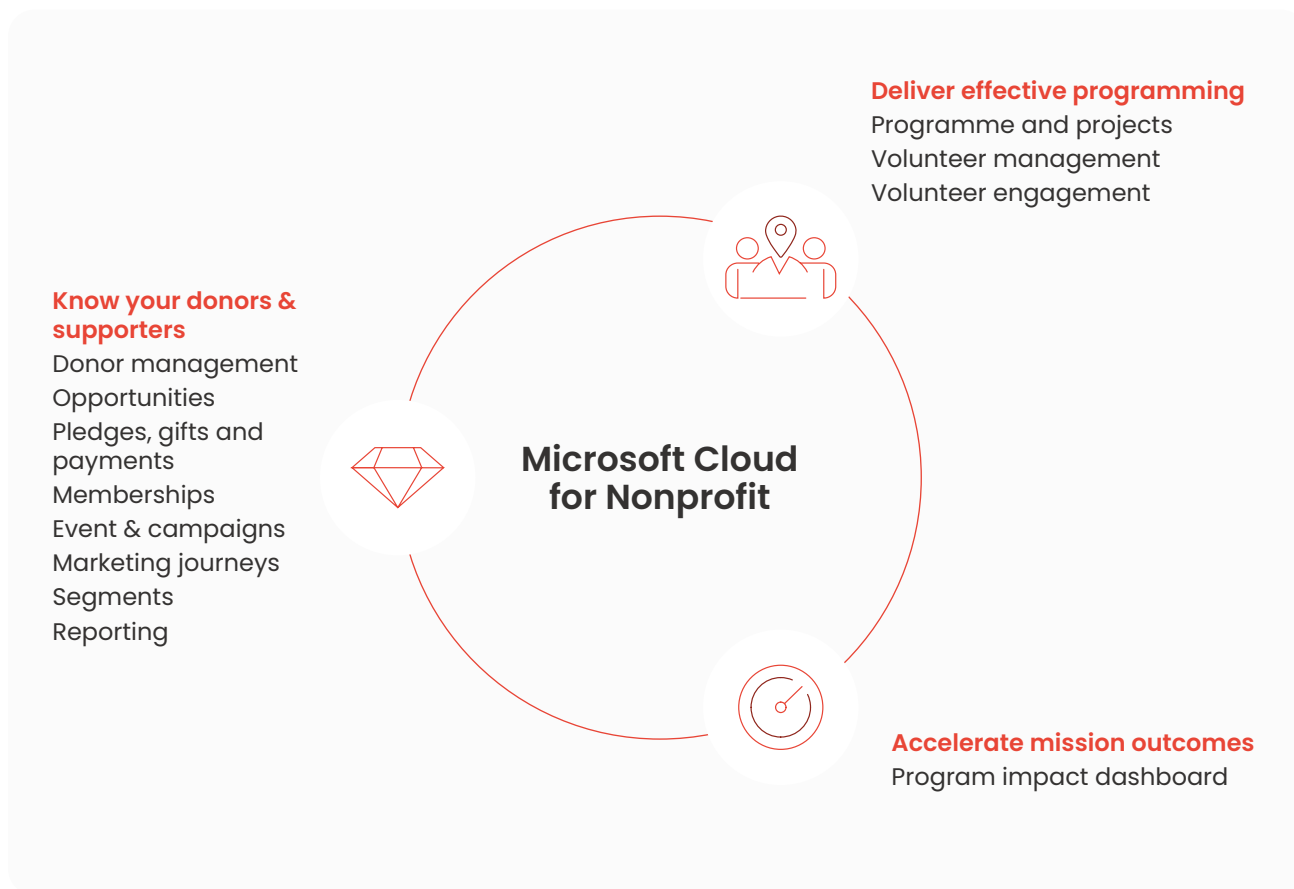
Segmenting

All Segments ▼ Edit columns Edit filters Search this view

Name ▼	Source ▼	Type ▼	Created date ▼	Status Reason ▼	Created by ▼	Members ▼
DO NOT EMAIL Preference	Marketing	Dynamic	6/22/2022 6:25 PM	Published	Shaun Dale	2
Donated in last 30 days	Marketing	Dynamic	6/22/2022 6:25 PM	Published	Shaun Dale	3
Donated in last 60 days	Marketing	Dynamic	6/22/2022 6:25 PM	Published	Shaun Dale	4
<input checked="" type="radio"/> Donated in the last 5 years	Marketing	Dynamic	6/22/2022 6:25 PM	Published	Shaun Dale	12
Donation given today	Marketing	Dynamic	6/22/2022 6:25 PM	Published	Shaun Dale	0
Donor who has never given recurring gift	Marketing	Dynamic	6/22/2022 6:25 PM	Published	Shaun Dale	8
Donor who has not given in the last year	Marketing	Dynamic	6/22/2022 6:25 PM	Published	Shaun Dale	3
Last volunteer participation is greater than 1 year	Marketing	Dynamic	6/22/2022 6:25 PM	Published	Shaun Dale	1
Last volunteer participation is greater than 6 months	Marketing	Dynamic	6/22/2022 6:25 PM	Published	Shaun Dale	3
Major Donor (>2,500)	Marketing	Dynamic	6/22/2022 6:25 PM	Published	Shaun Dale	2
Volunteer attended opportunity today	Marketing	Dynamic	6/22/2022 6:25 PM	Published	Shaun Dale	0

Reporting





Based on the Microsoft Cloud for Nonprofit, this solution offers:

- ▶ Streamlined, efficient processes and automation
- ▶ Communication integrations (SMS, social media, email)
- ▶ Participant and donor info tracking and real-time data
- ▶ Accurate and safely stored data used for mission-critical outcomes.
- ▶ Transparency into data and activities needed for funding organisations
- ▶ Global connectivity and mobile convenience

How does the technology fit together?

Microsoft Cloud



Secure
Scalable
Accessible
Backup

Dynamics 365



Sales
Marketing
Service
Projects
Finance
Supply Chain
HR

Power Platform



Workflow
Apps
Bots
Reporting

Automation & AI



Tables
Workflows
Configurations
Templates



See one of our latest projects with the Desmond Tutu Health Foundation in managing volunteers and participants in their TB, HIV and other crucial medical research:

[Watch Case Study](#)

We have helped Non-profits manage participants, staff and donors through the successful allocation of resources and engaging communication strategies.



Microsoft Cloud for Nonprofit empowers scalable and transformative mission impact by helping Nonprofit organisations engage with participants, volunteers, donors, supporters, and deliver effective programming while accelerating mission outcomes.

www.ec.co.za

**Book a
Discovery Call**