

# Does Double the Donation integrate with Microsoft Dynamics 365?

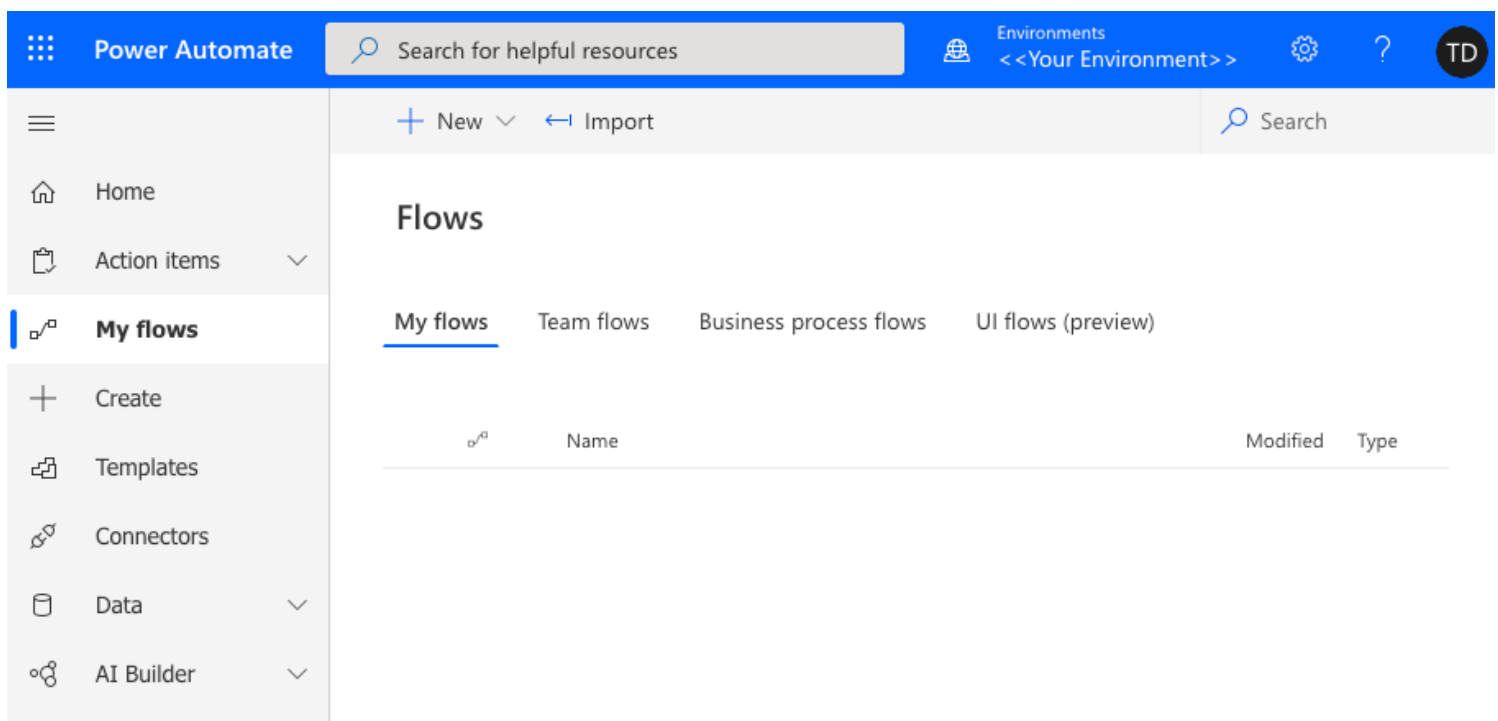
## Step-by-Step: Integrate Double the Donation's 360MatchPro into Microsoft Dynamics 365

360MatchPro is the industry-leading matching gifts automation solution for nonprofits and educational institutions to identify more matching gift revenue opportunities and drive more matches to completion. You'll need a 360MatchPro account to activate the matching gift functionality within this partner platform. Not a 360MatchPro client? Schedule a demo at <https://360matchpro.com/demo-request/>.

**Note:** Contact [support@doublethedonation.com](mailto:support@doublethedonation.com) to request your Microsoft Dynamics 365 360MatchPro import file before beginning this setup.

Click on images to enlarge.

**Step #1:** Navigate to "Power Automate," then to "My Flows." Select "Import."



The screenshot shows the Microsoft Power Automate interface. The top navigation bar is blue and contains the 'Power Automate' logo, a search bar for helpful resources, and environment information. The left sidebar is a light gray navigation pane with options like Home, Action items, My flows, Create, Templates, Connectors, Data, and AI Builder. The main content area is titled 'Flows' and has tabs for 'My flows', 'Team flows', 'Business process flows', and 'UI flows (preview)'. Below the tabs is a table with columns for 'Name', 'Modified', and 'Type'. The 'My flows' tab is currently selected.

- Solutions
- Learn

**Step #2:** Select the Microsoft Dynamics 365 360MatchPro import file provided to you by Double the Donation support.

**Import package**  
 Import flow created outside of a solution into this environment. Flows created in a solution can be imported under Solutions. [Learn more](#)

Choose the package file to import

Upload a .zip package file Upload

Import Cancel

**Step #3:** Select your environment resource.

**Import package**  
 Import flow created outside of a solution into this environment. Flows created in a solution can be imported under Solutions. [Learn more](#)

**Name**  
360MatchPro Power Automate Flow

**Environment**  
N/A

**Description**  
Ready for the next generation of matching gift fundraising? 360MatchPro helps your organization raise more money, better engage your donors, and save staff time. This flow works best with the Dynamics 365 Nonprofit Accelerator but can be adjusted to accommodate other schemas.

**Review Package Content**  
 Choose your import options.

NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
360MatchPro Power Automate Flow	Flow	Create as new 360MatchPro Power Automate Flow	

**Related resources**

NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
support@doublethedonation.com	Common Data Service Connection	Select during import	

Import

Cancel

### Step #4: Select "Import."

**Import package**  
Import flow created outside of a solution into this environment. Flows created in a solution can be imported under Solutions. [Learn more](#)

**Name**  
360MatchPro Power Automate Flow

**Environment**  
N/A

**Description**  
Ready for the next generation of matching gift fundraising? 360MatchPro helps your organization raise more money, better engage your donors, and save staff time. This flow works best with the Dynamics 365 Nonprofit Accelerator but can be adjusted to accommodate other schemas.

**Review Package Content**  
Choose your import options.

NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
360MatchPro Power Automate Flow	Flow	<a href="#">Create as new</a> 360MatchPro Power Automate Flow	

**Related resources**

NAME	RESOURCE TYPE	IMPORT SETUP	ACTION
support@doublethedonation.com	Common Data Service Connection	<a href="#">Select during import</a> support@doublethedonation.com	

**Import** **Cancel**

### Step #5: Navigate to the 360MatchPro flow by navigating to "My Flows" and selecting "360MatchPro Power Automate Flow."

**Power Automate** Search for helpful resources

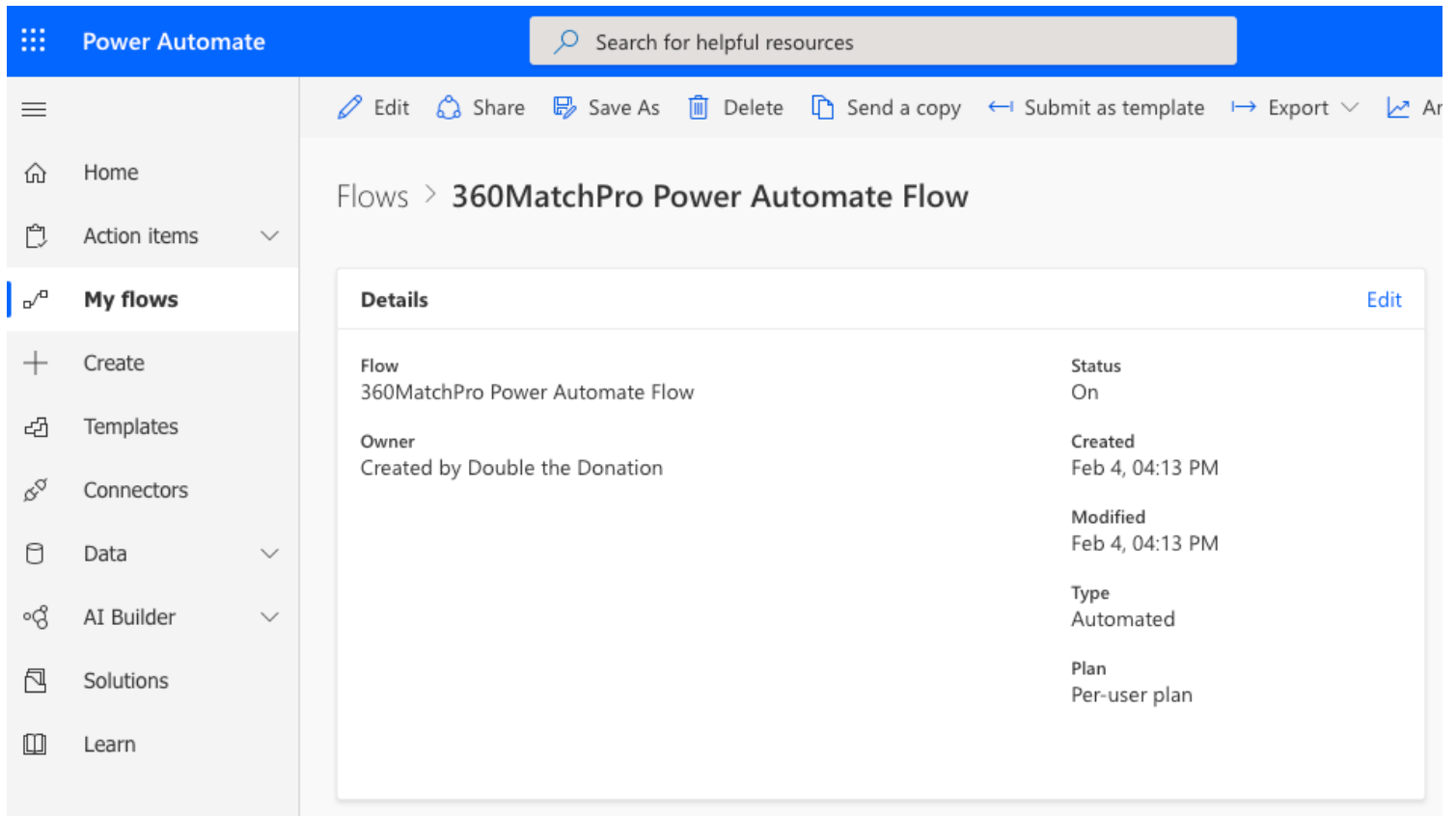
+ New Import

**Flows**

My flows Team flows Business process flows UI flows (preview)

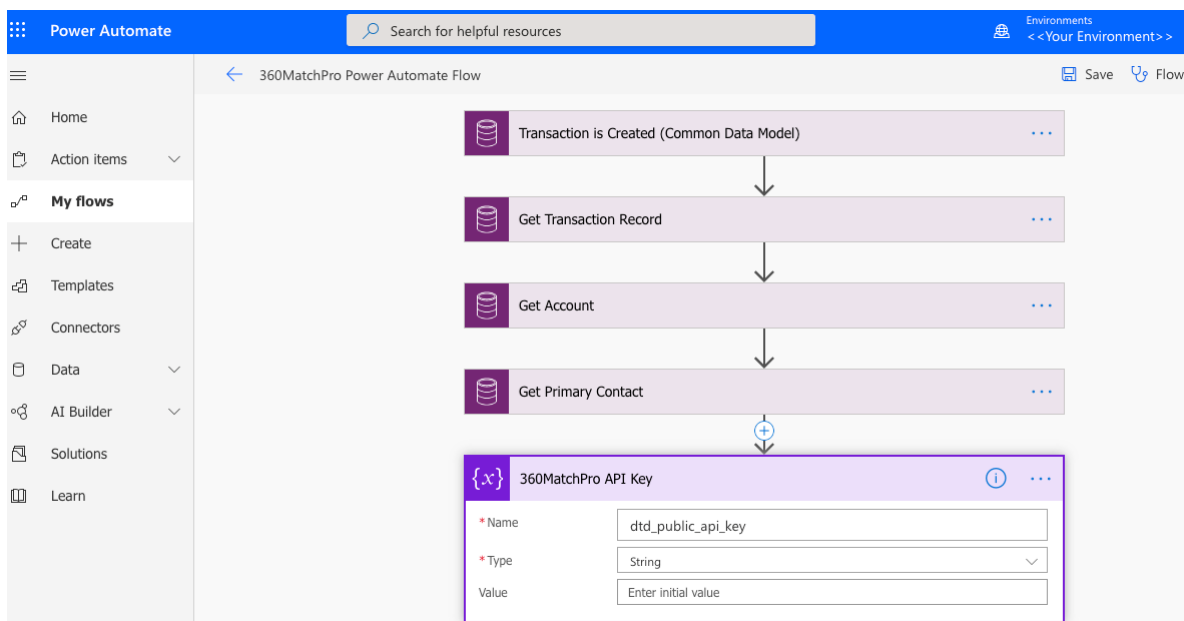
Name	Modified
360MatchPro Power Automate Flow	1 min ago

### Step #6: Select "Edit."



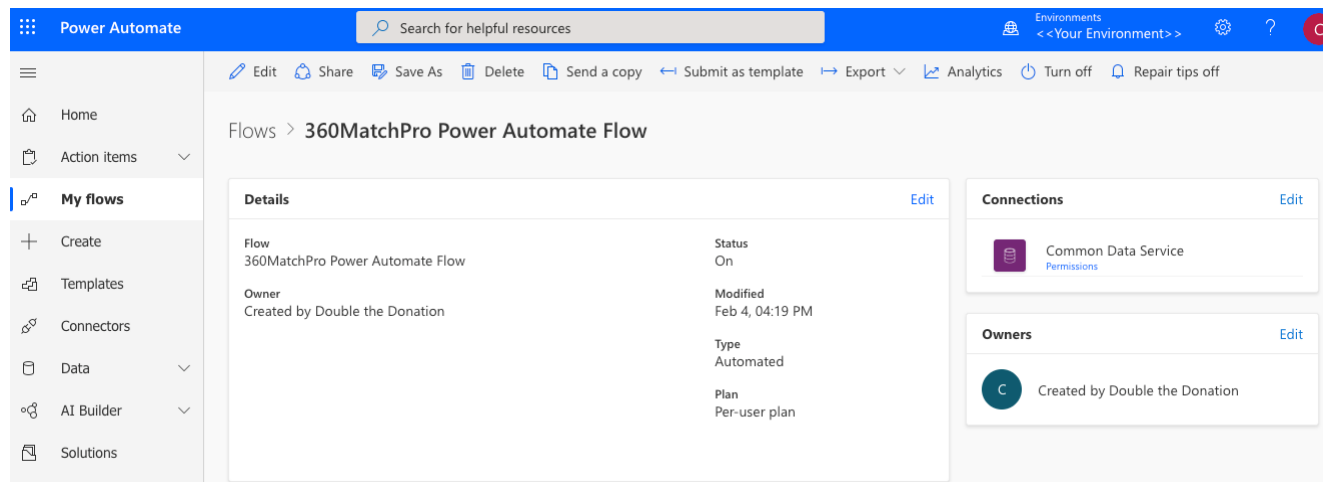
**Step #7:** Select the “360MatchPro API Key” step. Enter your 360MatchPro public key in the "Value" field, press "Save," and then press the back arrow.

**i** Not sure how to find your API keys? [Check out this article.](#)



Congratulations! Your 360MatchPro flow should be live. To verify that your flow has been turned on, check that

the "Turn off" button is be visible (see below).



## Microsoft Dynamics 365 - Double the Donation FAQs

**Q: I don't have a 360MatchPro account. How do I get one?**

A: Visit <https://360matchpro.com/demo-request/> to request a demo! Make sure you mention that you use Microsoft Dynamics 365 in your demo request form.

**Q: What data is imported into 360MatchPro?**

A: The flow pushes data into 360MatchPro when a new Transaction is created.

**Q: What contact information is pushed into 360MatchPro?**

A: The receipt is associated with an account. The account has a primary contact. 360MatchPro will use primary contact's information. The following image provides an example.

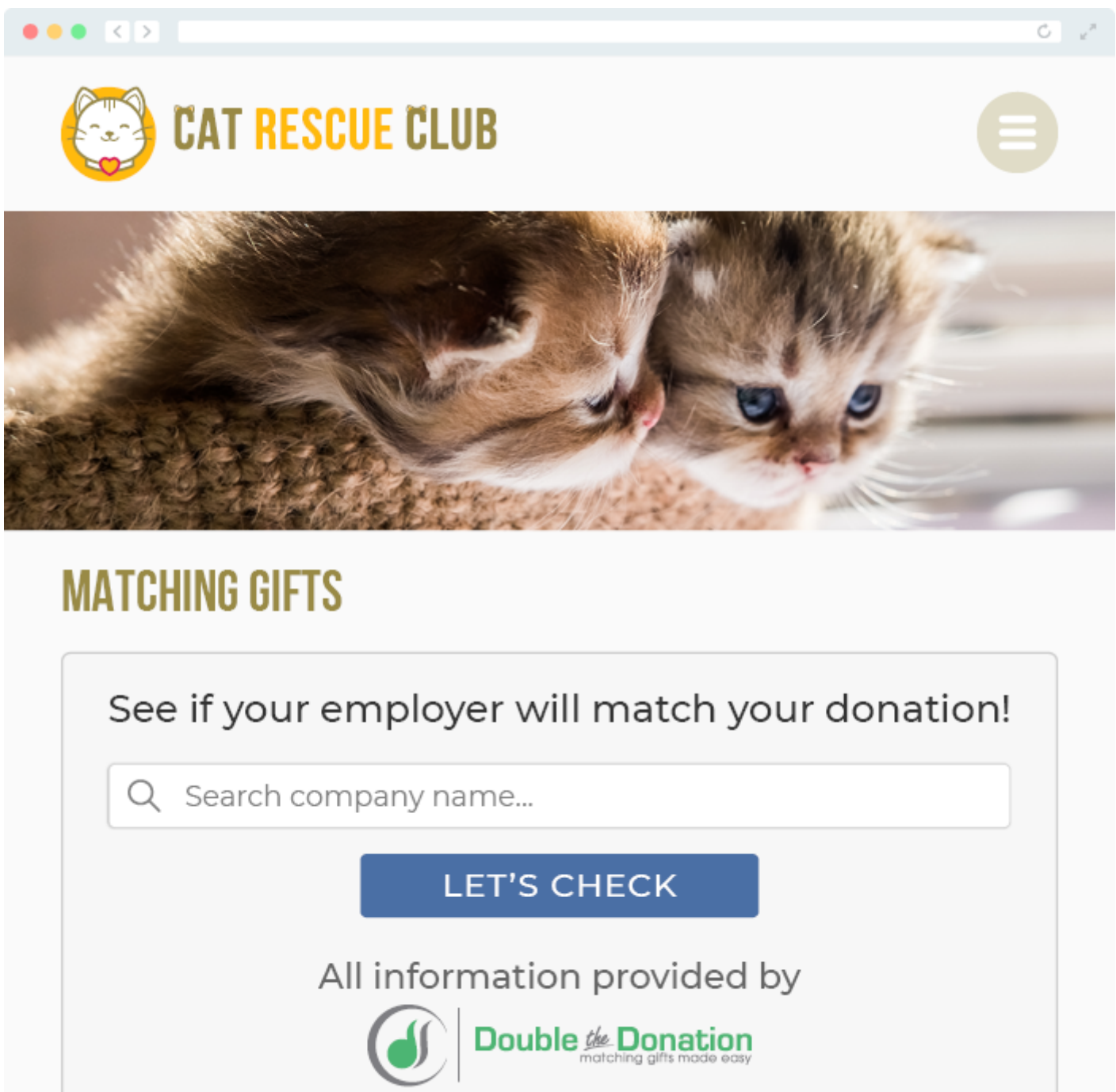
New Transaction	
General Administrative	
Name *	test donation
Amount *	\$75,000
Currency	US Dollar
Book Date *	2/4/2020 8:00 AM
Received Date *	2/4/2020
Data Entry Source *	DataEntryType
Anonymity	
Is Adjusted *	No
Adjustment Comment	---
Adjustment Reason	---
Adjustment Type	---
Posted Date	---
Receipt On Account	John Doe Family Account
Data Entry Reference	---
Exchange Rate	---
Exchange Rate Date	---
Payment Method	---

---	Payment Schedule	---
Original Transaction Adjusted		
---		

**Q: Where else can I embed Double the Donation's plugin?**

A: We recommend you create a dedicated matching gift page on your website to place matching gift information in the path of every website visitor, not just those already on your donation form. On this page, you can explain what matching gift programs are and provide donors with a chance to look up their employer’s program forms, guidelines, and instructions. Your dedicated matching gift page will become a useful resource to include in emails, newsletters, and direct messages.

To install Double the Donation’s matching gift search tool anywhere on your website, simply copy and paste the same Embed Code that you used before. Take a look at this example:



**Q: Where can I learn more about the 360MatchPro and Microsoft Dynamics 365 integration?**

A: Navigate to our [partner landing page](#) to learn how 360MatchPro and Microsoft Dynamics 365 can increase your matching gift revenue!