



NfP 365 Essentials

Increase fundraising and turn donors into life-long supporters with a CRM solution dedicated to small to medium-sized charities.

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What is NfP 365 Essentials?

Whatever the size of your not-for-profit organisation, and whatever your charitable cause, you still need to develop, understand, nurture and manage the relationships you have with all your supporters.

To achieve this, you need a charity relationship management solution that will centralise your key data and provide you with the tools you need to segment and target the right audience and to manage your marketing campaigns and communication efforts in an efficient and compliant way.

In many cases, obtaining this functionality involves embarking on a complex, long-term, costly implementation project that your not-for-profit may not have the budget or appetite for, and will most likely put a huge strain on all your resources.

That's why we've developed NfP 365 Essentials, a pre-packaged solution that offers you key relationship management, marketing and fundraising functionality, but with the flexibility to extend and increase its breadth of capability as your charity grows and your needs evolve.

Based on the Microsoft Dynamics 365 online platform, NfP 365 Essentials is the perfect choice if you're looking for a quick and easy implementation of a solution that's been tailored to meet the specific needs of not-for-profit organisations. No more IT management worries either. The Microsoft D365 online service takes care of your data security, disaster recovery and upgrade worries for you, and delivers the whole Cloud-based service with finance-backed service levels.

If you're already using Microsoft Office 365 you can quickly and easily access the functionality of the entire Microsoft suite from one single platform – providing you with an intuitive, efficient way of working, complemented by other powerful tools from Microsoft like Power BI for data analytics and presentation and SharePoint Online for document management.

So, what's included?

Relationship Management

A 360-degree view of your organisation's relationship with your supporters, whether organisations or individuals, potential donors, donors or volunteers.

Centralised contact management with one single source of information visible to fundraising teams, marketing teams, major donor teams and other key stakeholders allows for improved collaboration within your charity.

Permissions and Consents

The General Data Protection Regulation (**GDPR**) and the Fundraising Preference Service (**FPS**) have been hot topics of late – namely because as a not for profit organisation, if you don't comply with these regulations and manage your supporter data in a responsible manner, then your charity could face a big fine.

NfP 365 Essentials provides the foundations to help you ensure your data is secure and complies with EU data regulations and that individual permissions and consents essential to the compliance process are stored with robust audit trails.

Campaign Management

People are hit with marketing messages so frequently they can become little more than noise. That means messages need to be personalised, relevant and targeted to make a difference.

NfP 365 Essentials provides you with the information you need to fully understand your supporters and to build strategic campaigns based on this insight - campaigns that turn one-off donors into life-long supporters.

Record your supporters' preferred communication channels so you are only communicating with them as they choose and allow them to remove or add themselves from particular communications to adhere to data protection rules.

With advanced reporting, you can evaluate the success of your campaigns, establishing what works and you should do more of, and what doesn't and you need to improve.

Document Management Essentials

Basic document management is built in, allowing documents to be stored in SharePoint Online, in context with NfP 365 Essentials records.

Donations and Income Processing

Ensure the efficient and effective processing of income via donations, resolving donation queries and thank your supporters personally for donations with NfP 365 Essentials. Process Direct Debits seamlessly through payment gateway partners.

Gift Aid and Tax Efficient Giving

Built-in intelligence can identify income that's eligible for Gift Aid reclaim, so you don't have to. Using NfP 365 Essentials, you can create a claim, and check and audit it before final submission to the tax authorities.

Case Management

As standard, NfP 365 Essentials allows charities to create, manage and track a variety of simple or complex case management workflows and interactions with supporters, donors and volunteers.



Major Donors

Your major donors are a valuable and ongoing source of income for your charity, and as such, should be looked after to ensure they remain a life-long supporter of your cause. With NfP 365 Essentials you can easily identify and profile your major donors and create personalised nurture campaigns to build, manage and strengthen your relationship with these important individuals and organisations.

Legacy Essentials

NfP 365 Essentials allows you to manage legacy fundraising in a personal and sensitive way - from identifying and targeting potential legacy givers to building a relationship with these supporters and managing the registration of the legacy.



Security and Auditing Features

Although each user will have a single sign on, NfP 365 Essentials provides you with the option to determine who can access, view and edit your supporter data. With role-based security you can assign privileges that are relevant to a specific member of staff or team for them to carry out their role, but not have access to, or edit, any information outside of their role.

Dashboard and Reporting

Through intuitive Microsoft functionality that already feels familiar to you, non-technical users can slice and dice data with ease, exploring trends and relationships, drawing conclusions to support improvements in campaign management and fundraising.



Extension options

- ⊕ Financial and retail system integration
- ⊕ Just Giving / Virgin Money integration
- ⊕ e-marketing integration
- ⊕ Volunteer management
- ⊕ Social network monitoring
- ⊕ Event management
- ⊕ Supporter self-serve portals
- ⊕ Membership management

m-hance is a leading Microsoft Gold Partner and a leading supplier of Microsoft Dynamics 365 to the not-for-profit sector. We've worked with over 80 not-for-profit organisations including Oxfam Ireland, Amnesty International, Solent Mind and Irish Cancer Society. For over 20 years, we've been helping charities optimise fundraising campaigns, manage their volunteers and reduce costs through the Microsoft Dynamics solutions that we offer.

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