



Ever wondered when a software would help you drive your organization's mission, connect with donors and volunteers in a more efficient way and build with them bonds that last for life?

SocialOn by CODERS built on top of Microsoft Dynamics 365 Business Central is developed for NGOs like yours. Through the 360-degree view of donor and volunteer engagements granted by its customer relationship management (CRM) capabilities, it will help you aggregate your leads and gather insights to take contextual information into every conversation and enable the personalized interactions that make the whole difference in this day and age.

## EMPOWER YOUR EMPLOYEES

Microsoft Dynamics 365 Business Central enables greater staff productivity by seamlessly connecting organizational data with Office 365, combining it with familiar tools such as Outlook, Excel, and Power BI. By doing so, it will help you align donor resources and volunteer skills to connect beneficiaries with the services and information they need most.

## OPTIMIZE YOUR OPERATIONS

Microsoft Dynamics 365 Business Central offers you the means to streamline your organizational operations from field to office and reduce costs. No need for lengthy back-and-forths: at a glance, You can solve problems and scale your entire organization in the cloud.

## DRIVE IMPACT

Use artificial intelligence to provide your staff with the insights that will enable them to reach optimal impact. Plan your programs with a complete view across all processes—from donations to field operations. Easily tailor, extend, connect, and build application with little to no code and meet your specific organizational needs. Nonprofits Need a network!

- Donors & Funders
- Volunteers
- Clients
- Advocates
- Super-engaged Supporters
- Other contacts and stakeholders

## NONPROFITS NEED DATA!

- Reporting to Funders
- Grant Applications
- Annual Reports / Reporting Back to Donors
- Improved programs
- Sound decision making

## NONPROFITS NEED ESTABLISHED PROCESSES!

- Institutional Knowledge
- Increased Efficiency
- Shared Access to Information
- Consistency & Reliability

## KEY COMPONENTS

- Constituent Management
- Households\Organizations
- Volunteer Management
- Donation and pledge management
- Deduction Management
- Testament Management
- Endowments Management
- Annual Plan
- Project Management
- Allocations
- Cash Receipt Books
- Deduction Books
- Beneficiary Management
- Case Management
- Campaign Management
- Event Management

## NON PROFIT – SOLUTION HIGHLIGHTS

### 360-DEGREE CONSTITUENT OVERVIEW

- General Registry Info
- Personal Information
- Professional Information
- Address
- Contact Preferences
- Organization/ Association/ Attributes
- Overall Donations Attributes
- Social Media Links
- Interests & Events
- Connections
- Activities
- Requests
- Volunteering
- Pledges
- Donations
- Deductions
- Receipts
- Payments
- Testament
- Endowments



## TAILORED CONSTITUENT PROFILING

### CONSTITUENT DETAILS

Have your key figures show up in any form to ease all processes.

### HOUSEHOLDS/ORGANIZATIONS MANAGEMENT

Households/Organizations can be linked with a Constituent, a Member (organization or household), or both. These records have a beginning and an end date, and may have associated benefits, donations and other activities.

## FUNDRAISE

- 1-Manage the donation cycle from pledge to payment including individual donations and grants.
- 2-Standardize your donation processes, easily analyze your pipeline and automate routine tasks.
- 3-Improve your donations allocation process with built-in validation, auditing of batches, work process flows and triggers.
- 4-Drive annual plan success and manage your campaigns.

## DONATION MANAGEMENT

Donations may be related to:

- Constituent or Households\Organizations
- Deduction
- Pledge
- Project
- Endowment
- Campaign
- Testament

Track and manage donations of cash or goods and services.

## PLEDGE MANAGEMENT

Pledges are promises of donations and may be set up to receive multiple payments over time.

## GOLD RECEIPT

## ENDOWMENT

## DEDUCTION

Donating by Automatic Bank deduction

## TESTAMENT

- Track and manage the testament process
- Testaments can be related to specific projects
- Track testament returns

## ACTIVITY MANAGEMENT

- Phone calls
- Visits
- Online Contact
- Emails
- Events
- Survey
- SMS

## PHONE CALLS

This allows to record information and the details of an inbound or outbound call.

## APPOINTMENT

### ONLINE CONTACT

Such activities include: Facebook, Instagram, website visits...

### SMS

Our SMS solution allows users to send text messages directly from within the CRM. The text messages are then stored and viewable from within the client profile.

### EMAILS

Track both sent and received email messages from within Outlook or have them directly created and sent from Dynamics 365.

### SURVEY

- Create and send surveys to your constituents and receive their feedback.
- The constituents can fill your surveys on their phone, tablet, or computer.
- Store survey responses in Dynamics 365 for CE along with other Dynamics 365 data.

## CASES AND REQUESTS

All the processes related to your constituents requests are already integrated in our solution so that it can be used as a foundation to better serve them.

As for our add-on, it manages the following:

- Profiling
- Assigned Delegate
- Surveys
- Case Management
- Different Requests

## REQUESTS

01- Request to send a delegate

02- Request to receive materials

03- Request the refund of a donation

04- Request to change the purpose of a donation

05- Request to contact the donor

## KPIS FOR YOUR NONPROFIT

Donor & Donation Growth  
Donor Retention Rate  
Donation Conversions by Channel  
Number of Beneficiaries Served and Program Attendance  
Program Efficiency

## BENEFICIARY MANAGEMENT

- Record and store information about current and potential beneficiaries alongside their applications
- Manage benefits requests
- Manage medical/health assessments
- Manage education assessments

## MARKETING TARGET SEGMENTATION

## CAMPAIGN & EVENT MANAGEMENT

Campaigns are a collection of planning and communication efforts and may represent a fund drive, an event or simply a direct mail solicitation.

Track responses to campaign efforts – rsvp’s to events, donations prompted by a solicitation email, etc in order to know what is working and what is not...

Get in touch today and let us introduce you to this all-inclusive tool that will revolutionize the way your organization strives to fulfill its mission.