

Charity CRM Accelerator

For Dynamics 365



ANS

Think Bigger.

Does your charity face any of these challenges?

- Are you relying on outdated technology and spreadsheets to manage your supporters that drain resource and causes data security headaches?
- Do your donation and membership processes involve repetitive, manual tasks, creating inefficiencies throughout your organisation.
- Perhaps you're struggling to nurture donors and engage your supporter base because data is inaccurate or incomplete?
- Or, do you lack sufficient visibility of your supporter metrics which limit reporting and creates governance and compliance concerns?

Our Charity CRM Accelerator could be the answer!

If your organisation is encountering one, or more of these issues, we will support you in securing your data, boosting engagement and modernising reporting with efficient management across your supporter relationships.

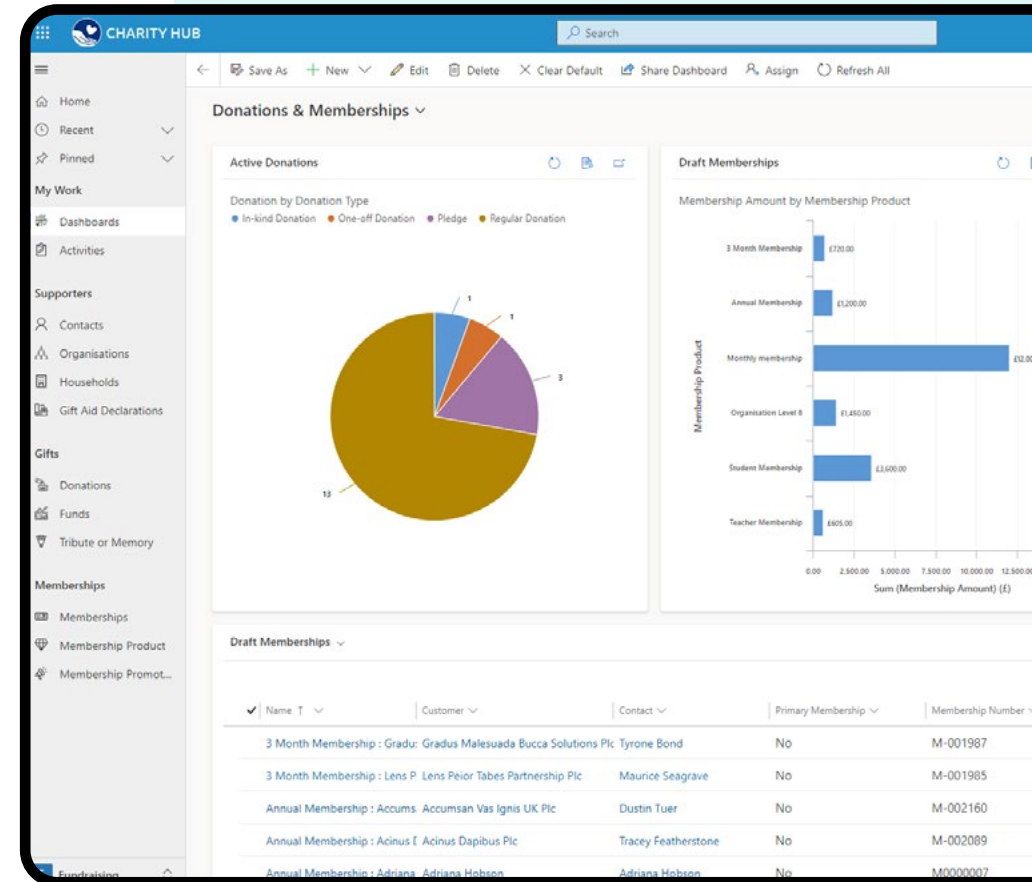
Introducing Charity Hub

Charity Hub will accelerate your implementation of Dynamics 365 to minimise setup time and CRM project costs.

Featuring pre-configured functionality for charities and non-profit organisations of all sizes, Charity Hub centralises supporter data to modernise processes and increase productivity.

Drive digital transformation by deploying Charity Hub with Dynamics 365 to:

- View real-time constituent information in a unified, centralised platform
- Seamlessly manage donations and memberships
- Automate membership renewals and payment schedules
- Track these financial transactions in a single database
- Capture Gift Aid declarations and efficiently process claims
- Gain actionable insights and make data driven decisions



Gain a single view of your supporters

Unify donor and member data by replacing disparate data sources of spreadsheets and legacy software with a single, secure application.

- Empower your employees and volunteers with a holistic, real-time view of supporter data.
- Use complete data to provide a more personalised service to your supporters.
- Access donation history, active memberships, financial transactions, recent enquiries, and other relationship details for each supporter in one place.
- Use process automation capabilities to ensure consistent data capture that will drive accuracy, transparency and collaboration.

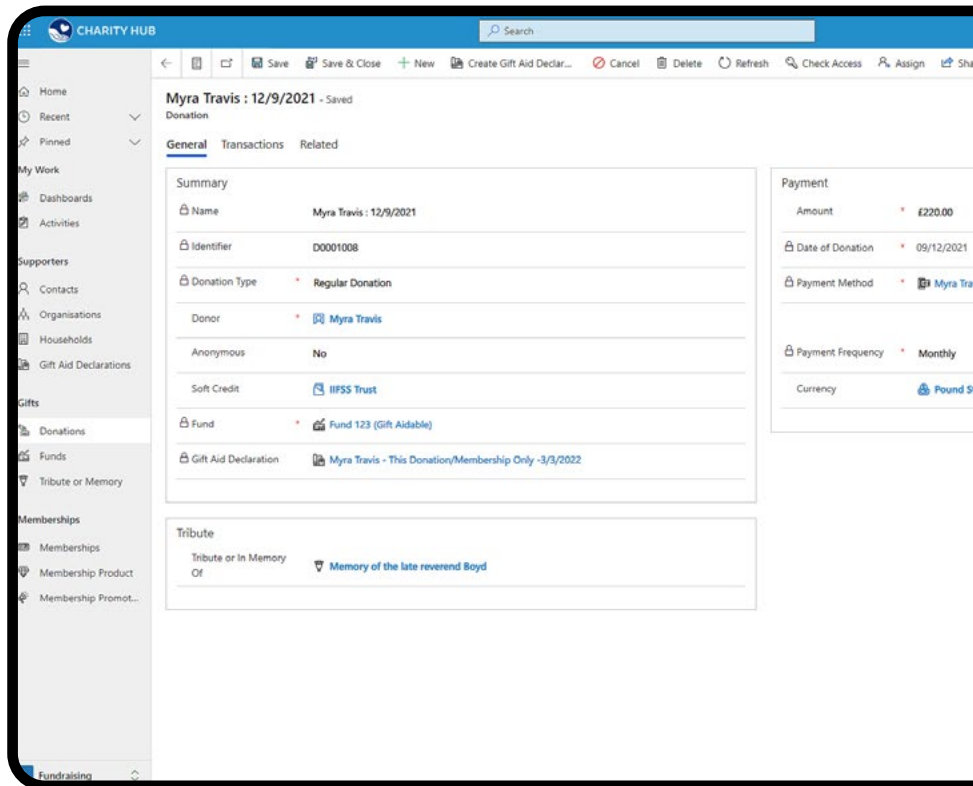
The screenshot displays the Charity Hub interface for a donor profile named Ben Wake. The interface includes a navigation sidebar on the left with categories like Home, Recent, Pinned, My Work, Supporters, Gifts, and Memberships. The main content area shows the donor's profile and two data tables.

All Donations

Identifier	Donor	Anonymous	Donation Type	Amount
D0001012	Ben Wake	No	Regular Donation	
D0001010	Ben Wake	No	One-off Donation	
D002	Ben Wake	No	Regular Donation	
D004	Ben Wake	No	Regular Donation	
D0001011	Ben Wake	No	Regular Donation	

Donation Transactions excluding Gift Aid

Identifier	Name	Payer	Type	Payment Type	Gross Amount
T0001606	Ben Wake : 2/3/2022	Ben Wake	Standard	Credit Card	
T0001607	Ben Wake : 2/3/2022	Ben Wake	Standard	Credit Card	
T0001608	Ben Wake : 2/3/2022	Ben Wake	Standard	Credit Card	
T0001609	Ben Wake : 2/3/2022	Ben Wake	Standard	Credit Card	
T0001610	Ben Wake : 2/3/2022	Ben Wake	Standard	Credit Card	
T0001611	Ben Wake : 2/3/2022	Ben Wake	Standard	Credit Card	
T0001612	Ben Wake : 2/3/2022	Ben Wake	Standard	Credit Card	



Efficient donor management

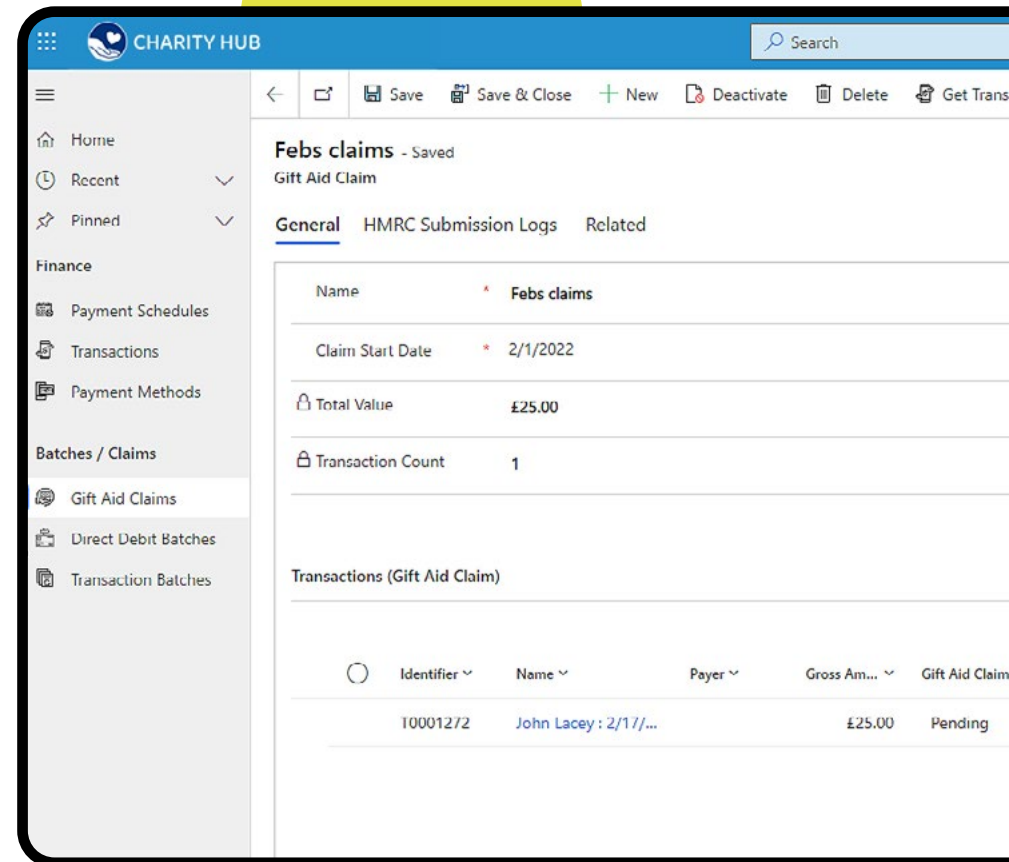
Get closer to your donors to strengthen relationships and aid fundraising efforts, by using Charity Hub to streamline processes and maximise the value of your data.

- Use out-of-the-box capabilities to manage all types of donations and pledges.
- Monitor donor patterns and use these data insights to target the right donors at the right time by integrating Charity Hub with a marketing automation platform.
- Quickly identify your most active donors and strengthen loyalty by keeping them engaged with personalised communications.

Gift aid transactions and claims

Use inbuilt Charity Hub capabilities to reduce administration when processing Gift Aid declarations and claims without to exporting data to spreadsheets.

- Don't miss out on Gift Aid contributions by consistently tracking declarations for one-off donations and a recurring donor payments.
- Gift Aid transaction records are automatically created in Charity Hub for each qualified transaction.
- Quickly identify eligible Gift Aid transactions and submit claims to HMRC in just a few simple steps.



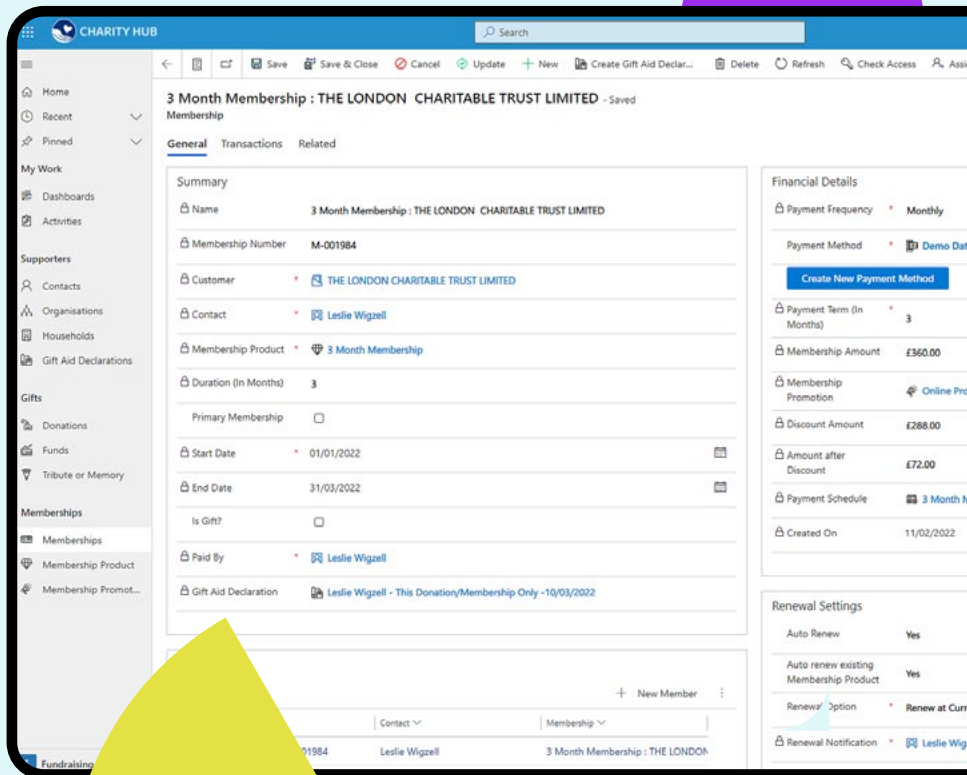
The screenshot displays the Charity Hub interface for a Gift Aid Claim. The top navigation bar includes the 'CHARITY HUB' logo, a search bar, and action buttons like 'Save', 'Save & Close', 'New', 'Deactivate', 'Delete', and 'Get Trans'. The left sidebar shows a navigation menu with options like 'Home', 'Recent', 'Pinned', 'Finance', 'Batches / Claims', and 'Gift Aid Claims'. The main content area shows the 'Febs claims' claim details, including the claim start date (2/1/2022), total value (£25.00), and transaction count (1). Below this, a table lists the transactions associated with the claim.

Identifier	Name	Payer	Gross Am...	Gift Aid Claim
T0001272	John Lacey : 2/17/...		£25.00	Pending

Simplify membership management

Charity Hub manages each member, membership product and payment in real-time and reduces administration by automating renewals. This includes:

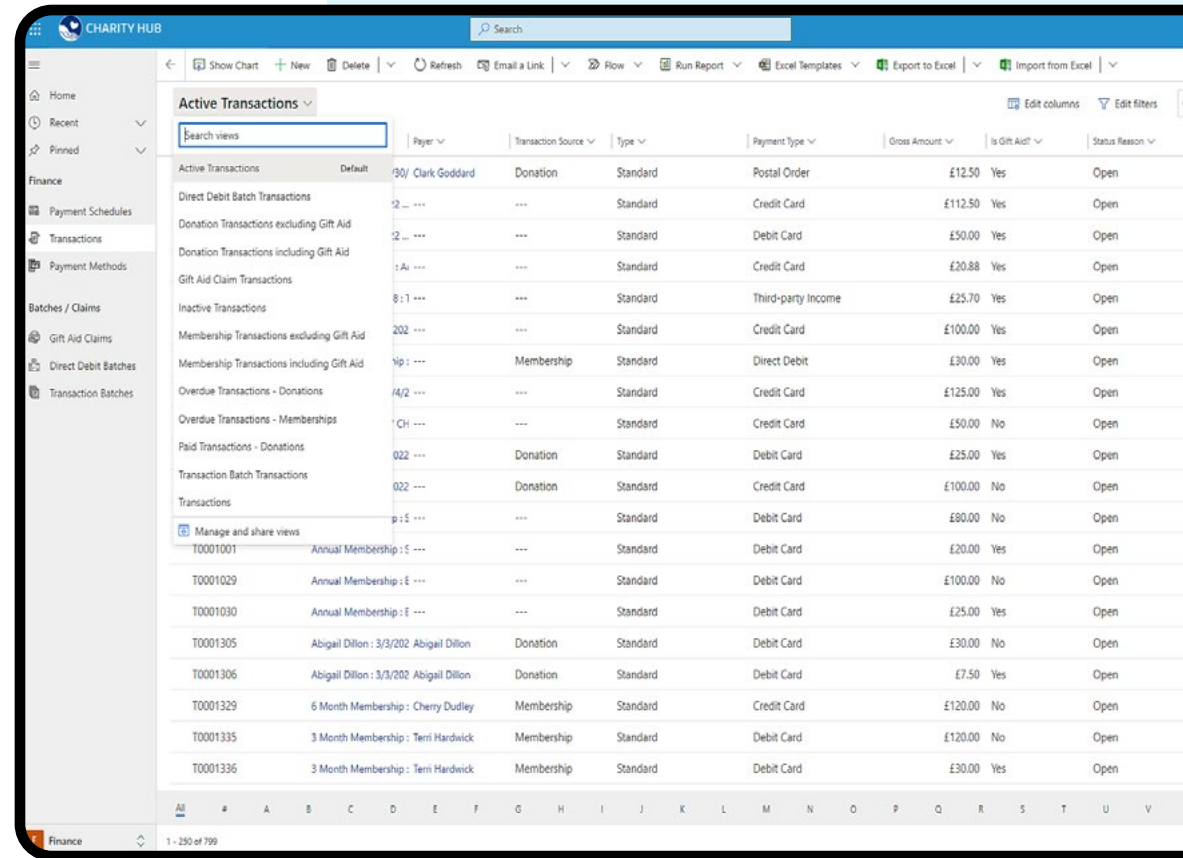
- Tracking memberships for individuals, households or organisation.
- Easy access to active and expiring memberships.
- Flexibility to handle discounted rates for membership promotions.
- Automated memberships renewal rules. Configure memberships to renew at the same membership price, the default product rate upon renewal, or at a custom amount.



Improved financial management

Strengthen your financial controls by tracking each donation and membership transaction in Charity Hub.

- See an organisation-wide view by tracking recurring, due and over-due payments across donors and memberships.
- Forecast future income to drive your growth strategy with accurate visibility of financial data.
- Be prepared for regulatory audits with an accurate view of donations received and amount spent.
- Track each payment method, including credit card, direct debit and third party income.
- Minimise payment errors by auto validating bank account details for direct debit payments.



The screenshot displays the Charity Hub software interface. The top navigation bar includes options like 'Show Chart', 'New', 'Delete', 'Refresh', 'Email a Link', 'Flow', 'Run Report', 'Excel Templates', 'Export to Excel', and 'Import from Excel'. A search bar is visible in the top right. The main content area is titled 'Active Transactions' and features a table with columns for Payer, Transaction Source, Type, Payment Type, Gross Amount, Is Gift Aid?, and Status Reason. The table lists various transactions such as 'Direct Debit Batch Transactions', 'Donation Transactions excluding Gift Aid', and 'Membership Transactions including Gift Aid'. The bottom status bar shows 'Finance' and '1 - 250 of 799'.

	Payer	Transaction Source	Type	Payment Type	Gross Amount	Is Gift Aid?	Status Reason		
Active Transactions	90/ Clark Goddard	Donation	Standard	Postal Order	£12.50	Yes	Open		
Direct Debit Batch Transactions	2 ...	---	Standard	Credit Card	£112.50	Yes	Open		
Donation Transactions excluding Gift Aid	2 ...	---	Standard	Debit Card	£50.00	Yes	Open		
Donation Transactions including Gift Aid	1 Ai ...	---	Standard	Credit Card	£20.88	Yes	Open		
Gift Aid Claim Transactions	8:1 ...	---	Standard	Third-party Income	£25.70	Yes	Open		
Inactive Transactions	202 ...	---	Standard	Credit Card	£100.00	Yes	Open		
Membership Transactions excluding Gift Aid	yp ...	Membership	Standard	Direct Debit	£30.00	Yes	Open		
Membership Transactions including Gift Aid	4/2 ...	---	Standard	Credit Card	£125.00	Yes	Open		
Overdue Transactions - Donations	4/2 ...	---	Standard	Credit Card	£50.00	No	Open		
Overdue Transactions - Memberships	022 ...	Donation	Standard	Debit Card	£25.00	Yes	Open		
Paid Transactions - Donations	022 ...	Donation	Standard	Credit Card	£100.00	No	Open		
Transaction Batch Transactions	p:5 ...	---	Standard	Debit Card	£80.00	No	Open		
Transactions	T0001001	Annual Membership: £	---	Standard	£20.00	Yes	Open		
	T0001029	Annual Membership: £	---	Standard	£100.00	No	Open		
	T0001030	Annual Membership: £	---	Standard	£25.00	Yes	Open		
	T0001305	Abigail Dillon: 3/3/202	Abigail Dillon	Donation	Standard	Debit Card	£30.00	No	Open
	T0001306	Abigail Dillon: 3/3/202	Abigail Dillon	Donation	Standard	Debit Card	£7.50	Yes	Open
	T0001329	6 Month Membership: Cherry	Dudley	Membership	Standard	Credit Card	£120.00	No	Open
	T0001335	3 Month Membership: Terri	Hardwick	Membership	Standard	Debit Card	£120.00	No	Open
	T0001336	3 Month Membership: Terri	Hardwick	Membership	Standard	Debit Card	£30.00	Yes	Open

Streamline repetitive tasks and workflows

Built on the Microsoft Power Platform, Charity Hub natively works with Power Automate to improve your process efficiency.

- Build automated processes using low-code, drag-and-drop tools. With hundreds of pre-built connectors, thousands of templates, and AI assistance, it's easy to automate repetitive tasks.
- Discover a better way to get things done and boost capacity by turning outdated processes into modern workflows.
- Expand your automation capabilities across desktop, web, and mobile with Power Automate apps.

The screenshot displays a Power Automate workflow with three steps:

- On New Donation**: The trigger step.
- Get Donor Details**: The action step that retrieves donor information.
- Post message in a chat or channel**: The final action step, which is currently expanded to show configuration options.

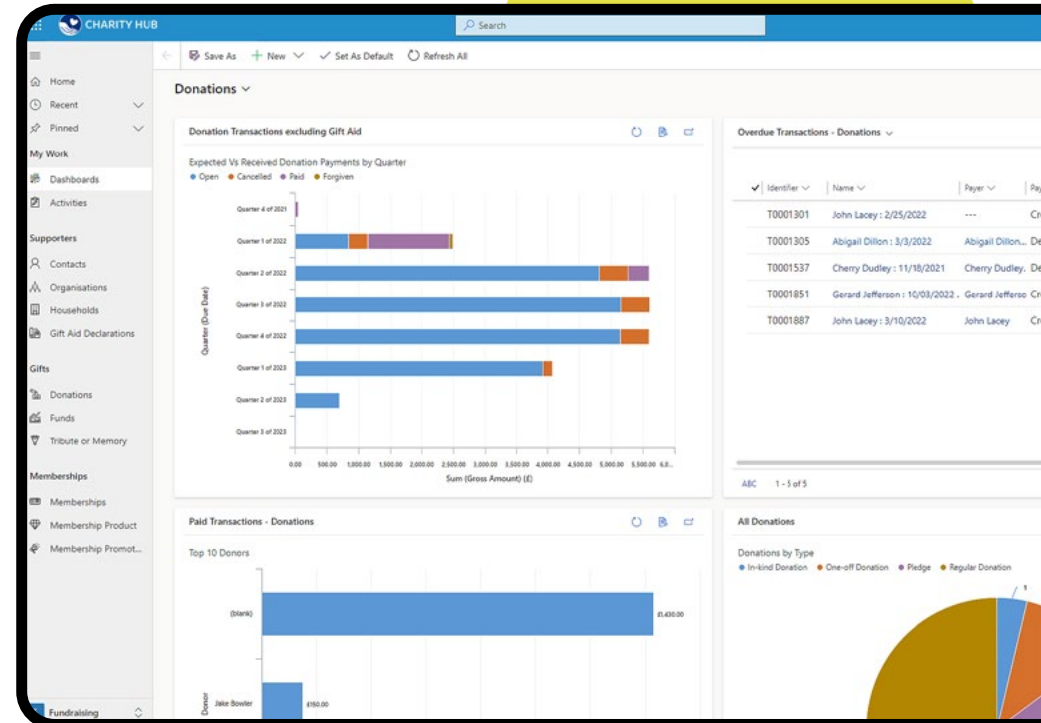
The expanded configuration for the third step includes:

- * Post as**: Flow bot
- * Post in**: Channel
- * Team**: Charity Hub
- * Channel**: Latest Donations
- * Message**: A rich text editor containing the message: **New donation received!!!**
Donor: [Full Name] x
Amount: £ [Amount] x

Data-driven decisions

Extract actionable insights from your data using system dashboards and personalised views.

- In real-time, track performance across your key supporter metrics and use these insights to adjust strategies and optimise results proactively.
- Use automated reports and create charts and views to analyse data, drill down into individual records and uncover meaningful insights.
- Flexibly extend Charity Hub's reporting by creating custom dashboards to meet your requirements and understand where your resources will be best focused.



Looking for grant management features?

Check out Grant Hub for Dynamics 365.

Grant Hub simplifies and speeds up your grant management, from seeking grants to managing grant disbursements, all in a single cloud location. Combine Grant Hub with Charity Hub to manage all your charity's activities in one place.

- Gain full visibility into your grant opportunity pipeline and view application status.
- Convert successful applications into grant awards.
- Quickly process funding requests by validating eligibility against predefined programme criteria and tracking all decisions and feedback.

The screenshot displays the Grant Hub interface for a funding request (FR-0001007). The interface is divided into several sections:

- General Information:** Shows the funding programme as 'General Fund', the applicant as 'Joe Bloggs', the primary contact as 'Joe Bloggs', the requested amount as '£2,000.00', and the status as 'Awarded'.
- Timeline:** A section for tracking events, showing a note: 'Modified on: 09:21 Phone Call from: Josh Reeves - Closed Call to discuss application'.
- Payment Summary:** A summary of financials: 'Awarded Amount: £2,000.00', 'Total Amount Paid: £1,000.00', 'Total Amount Written Off: £0.00', and 'Total Amount Scheduled: £1,000.00'.
- Funding Requirements Table:** A table listing requirements for the funding request.

Name	Due Date	Completed Date	Status Reason
Household Income < 30%	18/04/2023	18/04/2023	Completed
Submitted Project Proposal	18/04/2023	18/04/2023	Completed
18+	18/04/2023	18/04/2023	Completed
50 Hours of Volunteering	31/12/2023		Open
- Funding Disbursements Table:** A table listing disbursements for the funding request.

Name	Scheduled Date	Payment Amount	Status Reason
FD-0001020	31/12/2023	£1,000.00	Scheduled
FD-0001019	30/04/2023	£1,000.00	Paid

Charity Hub integrations

Your applications and tools can work seamlessly with Charity Hub to connect data and automate your workflows. This includes native integrations with Dynamics 365, Microsoft Teams, Outlook, Power BI as well as connectors for hundreds of popular apps and services.



dotdigital

Sage

DocuSign



mailchimp

loqate
GBG



Out of the box features include:

Supporter management and engagement

- Constituent & organisation management
- GDPR consent tracking
- Communication preferences
- Activity and communications timeline
- Relationship tracking
- Affiliation tracking
- Record tagging
- Send emails via Microsoft Outlook
- Automatic salutations

Fundraising

- One off donations
- Recurring donations
- Household and organisation donations
- Fund management
- Pledge management
- Major gifts
- Collaborate using Teams

Gift aid management

- Gift Aid declaration capture
- Gift Aid transaction tracking
- Collate and review Gift Aid batches
- Claim preview
- Gift Aid batch submissions to HMRC
- Manual claim submission

Financial management

- Track payment methods
- Export data to Excel
- Split payments
- Payment (transaction) tracking
- Bank account validation via Loqate

Web portals

- Native integration with Microsoft Power Pages
- Web forms capture data directly into system

Workflow automation

- Advanced workflow actions and triggers
- 100's of Power Automate connectors
- Real-time and scheduled workflows

Reporting and analytics

- Segment and filter views on data
- Create custom dashboards
- Native Power BI dashboard embedding
- Data API for analysing data using external tools such as Power BI, Tableau, Qlik
- Accounts system exports
- Full text global Charity Hub search
- Extensive REST API
- Data import/export

Security

- User roles and permissions management
- Read-only users
- Field-level permissions
- Microsoft Azure environment
- Enterprise level security
- Data backups
- Data encryption
- Two-factor authentication
- Password policies
- UK data residency

Membership management

- Membership products
- Automated membership numbers
- Gift memberships
- Membership renewals
- Membership promotions
- Automated payment schedules
- Additional members
- Organisational memberships



Why choose Charity Hub?

To learn more check out some of the key benefits below.



Affordable licensing

Eligible charities can take advantage of Microsoft's Tech for Social Impact program, which includes free and discounted Dynamics 365 licensing.



Intuitive interface

Built on the Microsoft Power Platform, Charity Hub has a proven user interface that is intuitive and easy to navigate for all staff and volunteers.



Accelerated Dynamics implementation

Charity Hub is pre-configured with the out-of-the-box functionality enabling you to quickly get started with Microsoft Dynamics 365.



Easy integration

Charity Hub seamlessly integrates with your Microsoft technology such as Outlook and Teams, and other apps including accounting and marketing automation.



Data privacy and security

Provides native data security and resilience by storing data in Microsoft cloud to protect supporter data and ensure compliance with regulatory and privacy requirements.

ANS serves charities and non-profit organisations to advance their digital transformation using Dynamics 365 and the wider Microsoft Cloud Platform.

We provide CRM solutions that enable organisations to innovate by connecting data, implement intelligent processes and increase the value of their data.

We would be delighted to discuss your requirements and explore how Charity Hub can benefit your organisation. Contact us today to learn more.

Get in touch.

Telephone

0800 458 4545

Web

www.ans.co.uk

Address

ANS Group
Birley Fields
Manchester
M15 5QJ

