



Microsoft
Dynamics 365



Charity Tailored CRM

The constant drive to manage and improve donor relationships, budgets and events can be a challenge in itself. Achieving this whilst also efficiently and effectively keeping teams up to date can exhaust valuable time and energy.

The good news is that handling these tasks is what a Customer Relationship Management (CRM) system like Microsoft Dynamics is built for.



Improve

Improve your service, assign tasks and track progress



Analyse

Document, analyse and report with ease



Increase

Increase fundraising and revenue capabilities



Simplify

Simplify membership and donation processing



Connect

Work remotely with secure single sign-on from your smart device



Engage

Connect and communicate effortlessly

Customisation - What we can do for you

Working in partnership with Microsoft, we integrate, develop and customise your chosen systems specifically to your needs.

As a silver Microsoft Partner, we operate within the top 5% of the Microsoft ecosystem to help organisations like yours get the best out of the intricate and powerful platforms you require.

- Data migration and integration support
- Custom set up and installation
- Marketing template creation
- Tailored report building
- Microsoft software training
- Support services

Work Smarter Not Harder

By providing your team with the tools and capabilities of a tailored Microsoft Dynamics CRM you streamline your workflow, saving time, money and effort. Resources better spent helping those you serve.

How our CRM setup could work for you...



Donor & Membership Management

- Donor, Volunteer and Membership database
- Donation amounts and origins
- Historical donor activity



Data Analysis & Reporting

- Analyse marketing and sales performance
- Set targets, goals and KPI's
- Monitor time, budgets and expenses



Fundraising & Gift Aid

- Follow grant applications status
- Just Giving and Virgin Money integration
- Giftaid integration directly to HMRC



Marketing and Social Engagement

- Improve interactions with prospects, customers and partners
- Personalisation, segmentation & events management
- Email marketing, LinkedIn, Facebook and Twitter integration



About Formus Pro

Professional software, solutions and support for growing businesses.

With offices in the UK and packages that support you, as well as your set up.

We offer a personal service that makes the business of doing business that much easier.