



# My NGO 365

The Complete Nonprofit Management Solution for Microsoft Dynamics 365





## Our Purpose

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Building connected, intelligent operations that drive clarity, speed, and scalable growth with Dynamics 365

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## The Nonprofit Operations Paradox

Funding pressures are increasing. Donor expectations are higher than ever. Nonprofits now need real-time transparency and accountability, not manual reporting. Yet many organizations still rely on disconnected spreadsheets, legacy donor systems, and manual grant tracking. Without unified systems, it becomes difficult to measure impact, maintain compliance, and scale programs effectively.

### The Cost of Fragmentation

#### Siloed Systems

Donor management, finance, and program data exist in separate tools, preventing a unified view of funding and impact.

#### Fragmented Data

Inconsistent donor records and scattered spreadsheets make it difficult to track funding, reporting, and program outcomes.

#### Disconnected Tools

Grant tracking, approvals, and financial reporting operate in isolation, leading to delays and administrative overload.

#### Impact Blind Spots

Limited visibility into program performance makes it harder to demonstrate outcomes and secure future funding.





## The Software Dynamics Strategic Approach

*Transitioning from Friction*

*To Intelligent Flow*







*Our approach is built on Intelligent Mission Connection. We go beyond ERP implementation to unify your donors, programs, funding streams, and impact data into a single nonprofit management engine that drives accountability, efficiency, and greater mission impact.*



## The NGO 365 Opportunity

NGO365 transforms Microsoft Dynamics 365 Business Central into a centralized nonprofit management platform. We don't just track donations; we orchestrate the entire funding-to-impact journey. From the moment a donor contributes funds to the delivery of programs and reporting of outcomes, our solution ensures every step is transparent, compliant, and aligned with your mission goals.

### The Transformation

-  **Unified Donor & Grant Management**  
Bring donations, grants, pledges, and funding agreements into a single source of truth. No scattered spreadsheets—just clear visibility into every funding stream.
-  **Intelligent Workflow Automation**  
Automate approvals, grant allocations, and reporting workflows. Reduce administrative overhead while ensuring compliance with donor and regulatory requirements.
-  **Program & Impact Tracking**  
Monitor programs, activities, and beneficiaries in real time. Connect funding directly to measurable outcomes and demonstrate the impact of every contribution.
-  **Real-Time Financial Transparency**  
Gain instant insight into budgets, fund utilization, and program spending—making reporting to donors, boards, and regulators simple and accurate.





## Key Features of My NGO 365

My NGO 365 is more than a nonprofit system, it is a preconfigured, mission-focused management solution built on Microsoft Dynamics 365 Business Central. Each capability is designed to simplify donor management, strengthen funding transparency, and give nonprofits the operational clarity needed to maximize impact.



### Comprehensive Donor Management

Manage donors by consolidating pledges, payments, communications, and engagement history in a single unified donor record.



### Grant & Pledge Management

Track complex funding arrangements including multi-year grants, pledges, and donor restrictions while maintaining full financial accountability.



### Purchase Requisitions & Approvals

Enable staff to request project resources through structured approval workflows that respect donor restrictions and project budgets.



### Project & Program Management

Link financial transactions directly to projects and initiatives to clearly demonstrate how resources translate into real-world impact.



### Impact Reporting & Dashboards

Deliver real-time insights to donors, boards, and leadership with visual dashboards and automated impact reporting.



### Fund Accounting & Compliance

Maintain accurate tracking of restricted and unrestricted funds while ensuring compliance with nonprofit accounting standards.



### Volunteer & Resource Management

Coordinate volunteer time, skills, and shared resources efficiently across multiple projects and programs.



### Multi-Branch & Multi-Currency Support

Operate seamlessly across countries and branches while managing grants and expenditures in multiple currencies.



### Tax Localizations & Compliance

Ensure compliance with regional tax regulations through automated calculations, localized rules, and streamlined statutory reporting.



# Comprehensive Donor Management

Your donors are partners in mission, not just funding sources. Manage them strategically to strengthen relationships and maximize support.

## 360-Degree Donor Profiles

Consolidate pledges, payments, communications, and event history in a single unified record.

## Segmentation & Targeting

Classify donors by type, giving frequency, or geographic interest to tailor outreach.

## Pledge Fulfillment Tracking

Link pledges to payments automatically, providing real-time visibility of outstanding commitments.

Know your donors fully and engage them with relevant, personalized communications for stronger long-term partnerships.

## THE REAL IMPACT

Increase donor retention, optimize engagement, and ensure timely fulfillment of pledges.



## Grant & Pledge Management

Track complex grants and pledges accurately, respecting donor restrictions, timelines, and multi-year disbursements.

### **Restricted vs. Unrestricted Funds**

Automatically flag expenditures to prevent misuse of restricted funding.

### **Milestone-Based Drawdowns**

Trigger invoices or receipts when grant conditions are met, maintaining an audit trail.

### **Real-Time Fund Balances**

View available balances instantly to empower informed spending decisions.

Manage grants and pledges efficiently while ensuring compliance with donor intentions and reporting obligations.

### **THE REAL IMPACT**

Prevent fund misallocation, streamline reporting, and strengthen accountability to donors and stakeholders.



## Purchase Requisitions & Approvals

Control nonprofit spending while ensuring transparency and compliance with project budgets and donor restrictions.



### Budget-Aware Requisitions

Automatically check available project funds before approving requests.



### Configurable Approval Hierarchies

Route requests through the right channels based on fund type, project, or amount.



### Auditable Procurement Trail

Record every step from request to payment for full donor and auditor visibility.

Maintain accountability in every purchase while empowering staff to request resources efficiently.

### THE REAL IMPACT

Prevent overspending, ensure compliance with donor restrictions, and provide audit-ready procurement records.



## Project & Program Management

Link financial data to programmatic outcomes, showing stakeholders the real impact of your nonprofit work.



### Project-Centric Accounting

Tag every transaction—salaries, supplies, and expenses—to specific projects or initiatives.



### Budget vs. Actual by Project

Monitor project financial health in real-time and identify overruns early.



### Outcome Tracking

Link qualitative milestones and indicators to projects to demonstrate measurable success.

Track projects comprehensively, combining financials with outcomes to show the full story of impact.

### THE REAL IMPACT

Improve transparency, demonstrate program effectiveness, and strengthen donor confidence in results.



## Impact Reporting & Dashboards

Provide donors and boards with clear, timely insights on financials and program outcomes.



### Donor-Specific Report Generation

Create tailored reports showing exactly how donor funds were spent.



### Visual Impact Dashboards

Use interactive dashboards to track financial health, project progress, and KPIs.



### Real-Time Data, Zero Effort

Reports are always current thanks to unified financial and project data.

Show donors and boards real-time impact through clear, interactive reporting.

### THE REAL IMPACT

Enhance transparency, build trust, and reduce manual reporting effort.



## Fund Accounting & Compliance

Track net assets, fund balances, and ensure compliance with nonprofit accounting standards.



### True Fund Accounting

Manage general ledger dimensions for restricted and unrestricted funds accurately.



### Automatic Interfund Transfers

Allocate costs between projects seamlessly while keeping transactions traceable.



### Comprehensive Audit Trail

Drill down from financial statements to original pledges and expenditures.

Maintain financial integrity across all projects while simplifying audits and compliance.

### THE REAL IMPACT

Ensure accurate reporting, prevent misallocation of funds, and provide auditors with a complete record.



## Volunteer & Resource Management

Manage volunteer time, skills, and resources efficiently, supporting multiple projects seamlessly.



### Volunteer Skills Database

Track volunteer skills, availability, and hours, matching them to project needs.



### Resource Scheduling

Coordinate shared assets like vehicles and equipment to avoid conflicts.



### In-Kind Donation Tracking

Record and value non-cash contributions to capture full organizational support.

Optimize volunteer and resource management while capturing all contributions comprehensively.

### THE REAL IMPACT

Maximize volunteer effectiveness, prevent resource conflicts, and improve reporting of non-cash donations.



## Multi-Branch & Multi-Currency Operations

Manage multiple branches and countries efficiently, scaling operations without sacrificing compliance or visibility.

### Centralized Oversight, Decentralized Operations

Headquarters retains consolidated visibility while branches manage local projects independently.

### Multi-Currency Grant Management

Receive funding in foreign currencies; track local spending with real-time conversion.

### Inter-Entity Reconciliation

Automate tracking of inter-branch loans, cost recharges, and fund transfers.

Operate efficiently across branches and currencies, maintaining full financial oversight.

### THE REAL IMPACT

Support organizational growth, ensure accurate reporting across locations, and maintain fund integrity worldwide.



## Tax Localizations & Compliance

Comply with VAT, payroll, and income tax regulations without manual intervention or errors.



### Region-Specific Tax Rules

Adapt Business Central to local tax requirements for nonprofits.



### Automated Tax Calculations

Calculate taxes correctly for every transaction based on exemptions and regulations.



### E-Filing Integration

File returns and remit payments directly to tax authorities where supported.

Simplify statutory compliance while minimizing the risk of penalties and errors.

### THE REAL IMPACT

Maintain regulatory compliance, reduce administrative burden, and protect your nonprofit's reputation.



## NGO 365: Mission Impact & Accountability

NGO 365 delivers measurable value across every layer of social operations, turning donor investment into transparent and impactful community results.



### Mission Efficiency

- Financial reporting for grant donors that previously took days is completed in hours.
- Automated fund tracking and reconciliation reduce manual tasks for field and head-office staff.
- Streamlined CRM and ERP integration ensures donations, grants, and tax receipts are captured automatically.



### Funding Sustainability

- Accurate budget and grant management enforcement maximize social impact.
- Supporter insights and engagement programs drive recurring gifts and donor growth.
- Real-time program and supply availability reduce service gaps in critical regions.



### Audit Readiness

- Centralized data eliminates errors from disconnected field offices.
- Automated workflows ensure compliance with international standards and local non-profit regulations.
- Multi-region and multi-program operations are managed consistently.



### Model Replication

- New programs inherit standardized processes and workflows, minimizing startup risk.
- Global mission expansion is supported without additional administrative complexity.



# Strategic Industry Accelerators

Eliminating the complexity of traditional development through industry-standard blueprints. We replace "start from scratch" with "start from success." Software Dynamics' suite of Industry Accelerators provides the foundational logic your business needs, pre-configured to meet specific sector demands.

## The Software Dynamics Accelerator Advantage:

### Industry-First Architecture

Beyond generic platforms with data models and workflows pre-aligned to your specific industry's best practices.

### Accelerated Time-to-Market

Bypass months of custom coding. Our pre-engineered solutions allow you to launch core operations in weeks, not years.

### Predictable Outcomes

Move from theoretical customization to proven performance. Our ISV integrations are designed for seamless compatibility within the Dynamics 365 ecosystem.

### Risk-Mitigated Deployment

Leverage "what has worked before." By utilizing battle-tested logic, we significantly reduce the technical risk of enterprise-scale transformation.





# Why Momentum Accelerators?



## Microsoft Certified

Vetted for security and seamless D365 compatibility.



## Rapid Deployment

Reduce deployment time by up to 85%.



## Multinational DNA

Built to handle the unique tax, payment, and regulatory landscape across the world.

Designed to help you move faster, smarter, and with certainty.

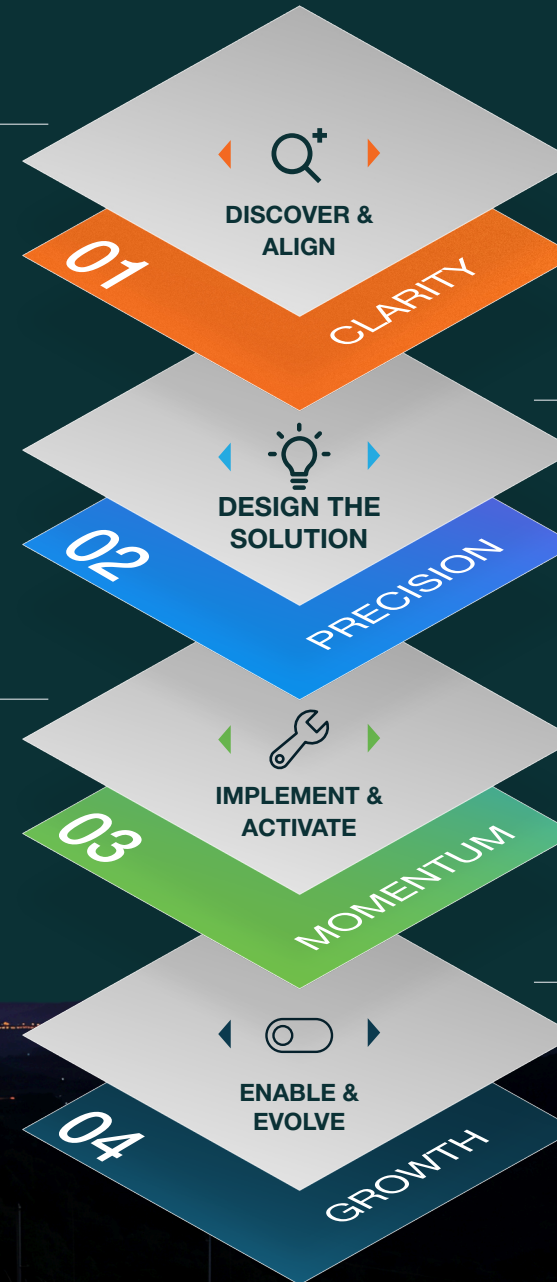


# How we Deliver

## A Proven Delivery Framework

**01**  
**Discover & Align**  
Assess current systems, identify pain points, inefficiencies, and business needs to build a clear foundation for transformation.

**03**  
**Implement & Activate**  
Implement Dynamics 365 modules, integrations, customizations, and data migration — delivering a smooth go-live with minimal disruption.



**02**  
**Design the Solution**  
Define optimized processes, future-state architecture, target operating model, and detailed roadmap for Dynamics 365 success.

**04**  
**Enable & Evolve**  
Train teams, drive smooth change management, then continuously improve and maximize ROI with ongoing tuning, support, and value tracking.



*Transformation is a journey, not a one-time project.*



# Proof & Impact: The Benchmark for Enterprise Transformation

Trusted Performance. Proven Resilience. Measurable Growth.

We are not just a service provider; we are a strategic Microsoft Solutions Partner with a documented history of navigating complex digital shifts across EMEA. We turn technical debt into operational equity.

## Strategic Authority & Global Reach

- **EMEA Implementation Excellence:** Deep technical expertise in executing high-stakes Microsoft deployments across Africa, the Middle East, and Europe.
- **Multi-Sector Mastery:** Proven track record in optimizing high-complexity industries, including Manufacturing, Retail, Financial Services, Logistics, and Non-Profit sectors.
- **Outcome-Focused Engineering:** We move beyond "go-live" to ensure every implementation delivers measurable efficiency and sustainable, long-term growth.
- **Full-Stack Innovation:** Leveraging the total power of the Microsoft ecosystem—Dynamics 365, Power Platform, Azure, and AI—to build secure, compliant, and future-ready enterprises.



# A Strategic Microsoft Partnership

Software Dynamics is a deeply integrated Microsoft Solutions Partner for Business Applications. Our elite status grants you direct access to global Microsoft resources, ensuring your transformation is backed by the highest tier of technical excellence.



## Why Choose an Elite Partner?

By leveraging Software Dynamics' partnership designation and validated AppSource solutions, you secure a lower-risk implementation, faster time-to-value, and a foundation built on world-class best practices.



### Top 1% Global Partnership

Recognized in the elite tier of Microsoft Partners worldwide for exceptional performance and customer success.



### Direct Microsoft Incentives

Providing exclusive access to special incentives and offers designed to accelerate your deployment and lower costs.



### AppSource Certified Assets

Offering proprietary accelerators validated by Microsoft for security and reliability to ensure seamless ecosystem integration.



### Mastery Across the Stack

Leveraging a team of 20+ Certified Experts with advanced specializations in Finance, Supply Chain, and the Power Platform.



### Cross-Border Track Record

Utilizing 15+ years of experience and 150+ implementations to transform complex regional challenges into global advantages.



# Implementation Consulting Services

To ensure a successful rollout of NGO 365, we provide specialized consulting services that guide organizations from initial planning to full deployment. Our consulting approach focuses on aligning NGO processes with your Microsoft Dynamics environment, ensuring a seamless and efficient go-live.

## The Expert Team



### D365 Nonprofit Consultant

Manages donor engagement, grant life cycles, fundraising initiatives, and constituent tracking.



### D365 Finance Consultant

Handles fund accounting, restricted revenue tracking, and automated nonprofit financial reporting.



### D365 Supply Chain Consultant

Optimizes humanitarian aid delivery, inventory distribution, and procurement for field operations.

## Implementation Phases



### Discovery & Design

Business process mapping, requirements gathering, and solution architecture planning.



### Build & Configure

System setup, legal entity configuration, and NGO logic configuration.



### Integration & Technical Setup

Integration with Dynamics 365 Finance, technical testing, and legacy data migration.



### Deployment & Support

Go-live support, end-user training, and post-launch assistance.

## Implementation Complexity Tiers



### Standard (Low Complexity)

Best suited for organizations with single-entity Business Central environments and straightforward NGO processes.

*Estimated Effort: 256-314 hours*

\$45/hr



### Advanced (Medium Complexity)

Ideal for NGOs with multiple entities, programs, or additional financial integrations.

*Estimated Effort: 314-640 hours*

\$45/hr



### Enterprise (High Complexity)

Designed for large-scale deployments requiring complex integrations and advanced structures.

*Estimated Effort: 940+ hours*

\$45/hr



## My NGO 365 Pricing Structure

NGO365 empowers nonprofit organizations to manage donors, programs, and finances from a unified platform built on Microsoft Dynamics 365 Business Central.



### Business Central

- Billing Basis: Per Legal Entity
- Platform: Microsoft Dynamics 365 Business Central
- Monthly Rate: \$250 per month

Subscription	Monthly Cost	Annual Cost
My NGO 365 - Donor & Fund Management	\$250	\$3,000



### Dynamics 365 Customer Service

- Billing Basis: Per Legal Entity
- Platform: Dynamics 365 Customer Service
- Monthly Rate: Starting \$250 per month

Subscription	Monthly Cost	Annual Cost
My NGO 365 - Grant & Outcome Management	\$250	\$3,000

### Key Terms & Conditions

- Each Legal Entity (Organization) is billed as its own subscription.
- Pricing is tiered based on the total number of users within the Legal Entity.
- NGO 365 follows the standard Business Central accelerator pricing model.



Join Software Dynamics in driving smarter,  
faster transformation.

Let's talk Solutions.



+254 768 341 410



[sales@softwaredynamicsgroup.com](mailto:sales@softwaredynamicsgroup.com)



South Africa · Kenya · Australia

#### DELIVERY CENTRES & REGISTERED ENTITIES

South Africa - SOFTWARE DYNAMICS SA (PTY) LTD (Reg. No. 2026/211288/07) | [sales@softwaredynamics.co.za](mailto:sales@softwaredynamics.co.za)

Kenya - SOFTWARE DYNAMICS LIMITED (CPR/2011/62397 | [sales@softwaredynamics.co.ke](mailto:sales@softwaredynamics.co.ke)

Australia - SOFTWARE DYNAMICS GROUP PTY LTD (ACN 696 184 666) | [sales@softwaredynamics.com.au](mailto:sales@softwaredynamics.com.au)