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CRM FOR BEGINNERS

PRESENTED BY
ZOEY FIFE

ROADMAP

- Entities
- Relationships
- CRM Views
- Filtering views
- Saving and managing views

CRM STRUCTURE

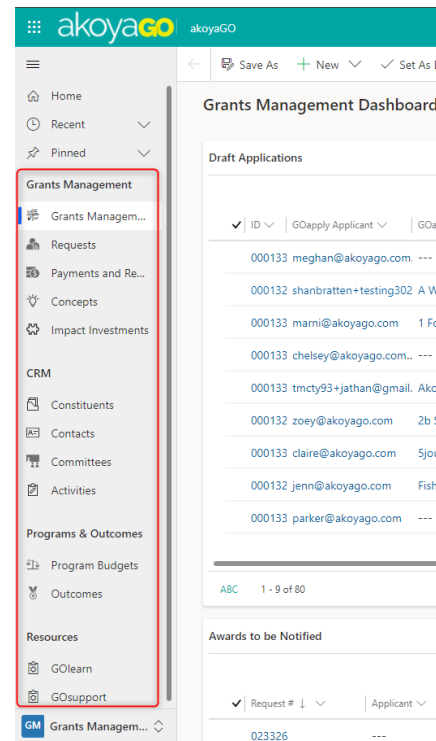
- What types of records exist?
- Where do they live?
- How are they related?

ENTITIES

- akoyaGO CRM is made up of “entities” or “tables”, these provide the framework for different types of data within the database
- Examples:
 - Constituent
 - Contact
 - Request
 - Payment and Requirement
 - Program
 - Gift
 - Fund

ENTITIES

KEY CONCEPT: Entities will always be listed in the navigation sidebar



ENTITIES - RELATIONSHIPS

- Database records can be RELATED to one another
 - These relationships allow you to view information across entities
- Relationships are set with lookup fields

The screenshot shows a software interface with a form and a dropdown menu. The form has the following fields:

Field	Value
Applicant	Look for Applicant
Primary Contact	---
Request Type	* Interfund
Program	+ Arts, Culture
Special Request Status	---
Finished	---

The 'Applicant' field is highlighted in yellow. A dropdown menu is open, showing a search bar 'Search timeline' and a list of constituents. The list includes:

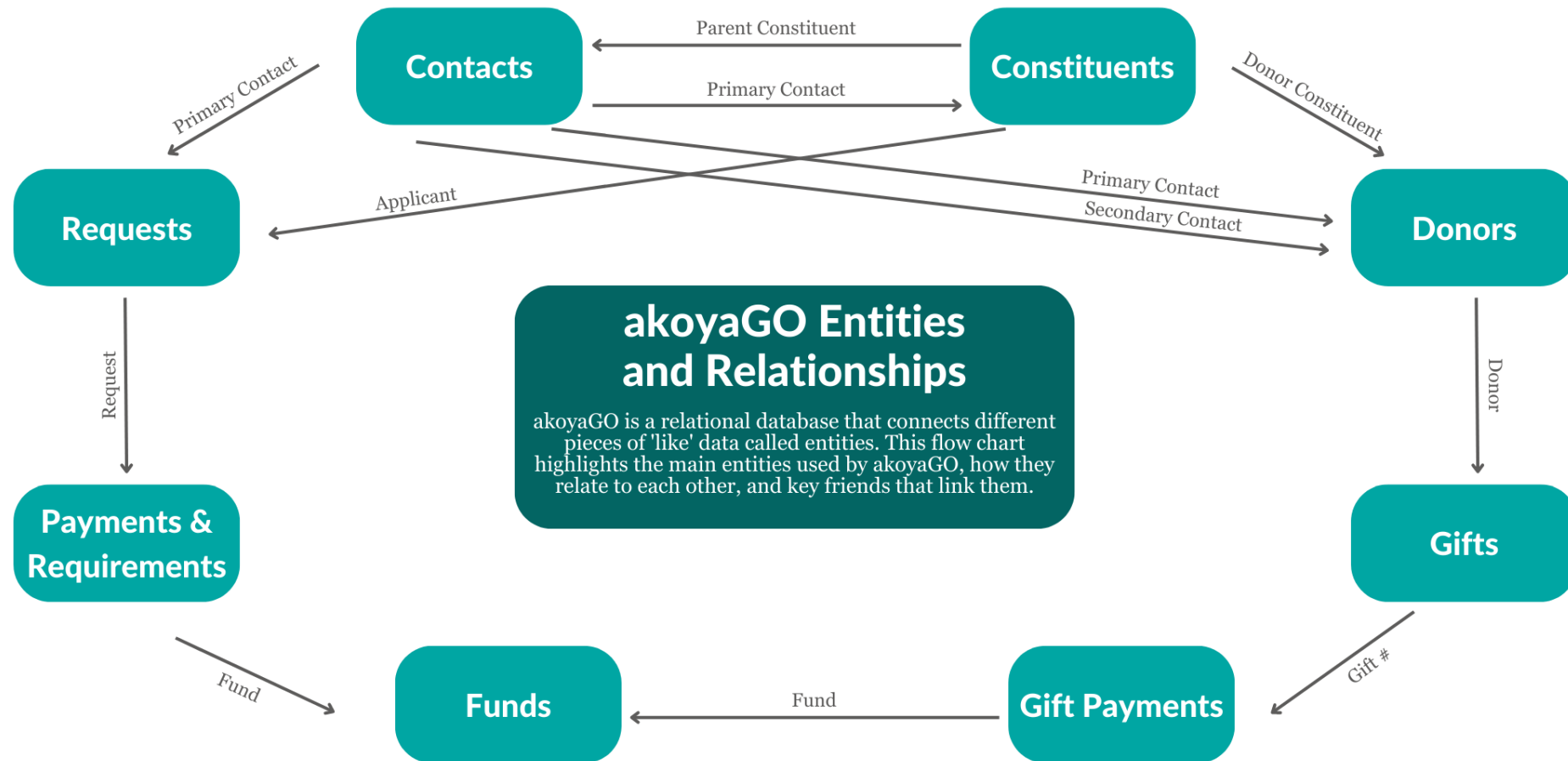
- (fem)me (fem)me
- (fem)me (fem)me Erin Wanat
- ? la port?e des sons inc.
- 1 Foundation Inc. - Headquarters x Jim St. James

At the bottom of the dropdown, there are two buttons: '+ New Constituent' and 'Advanced lookup'.

ENTITIES - RELATIONSHIPS

- Entity relationships can take several forms, allowing various types of relationships
 - Many to one (Example: many contacts related to a constituent)
 - One to many (Example: one request related to many payments and requirements)
 - Many to many (Example: many constituents related to many marketing lists)

RELATIONSHIP TYPES



RELATIONSHIPS

- Constituent:
 - Parent Constituent
 - Applicant (concept or request)
 - Donor Constituent (donors & prospects, gift payment, gift)
 - GOapply applicant organization (GOapply user)
 - Payee
 - Interfund grantee
 - College
 - High School


RELATIONSHIPS

- Contact:
 - Constituent primary contact
 - Grant Recommender (request and interfund grants)
 - Committee member
 - Primary contact (request or concept)
 - Event attendee
 - Fund primary contact
 - Gift memorial contact
 - Primary donor contact (donors & prospects, gift and gift payment)
 - Secondary Donor contact
 - Scholarship Contact
 - Spouse Contact

SEEING RELATED RECORDS

KEY CONCEPT: Related records can always be found in the “related” section of a form (some smaller screens this will collapse into an ellipses ...)

023326 - Saved Request				Approved Request Status	5/15/2023 Decision Date	Arts, Culture Program	\$200.00 Grant Amount	▼
<u>Summary</u>	Payments & Requirements	Documents	Project	Scholarship	Process	GOapply	Outcomes	...



CRM VIEWS

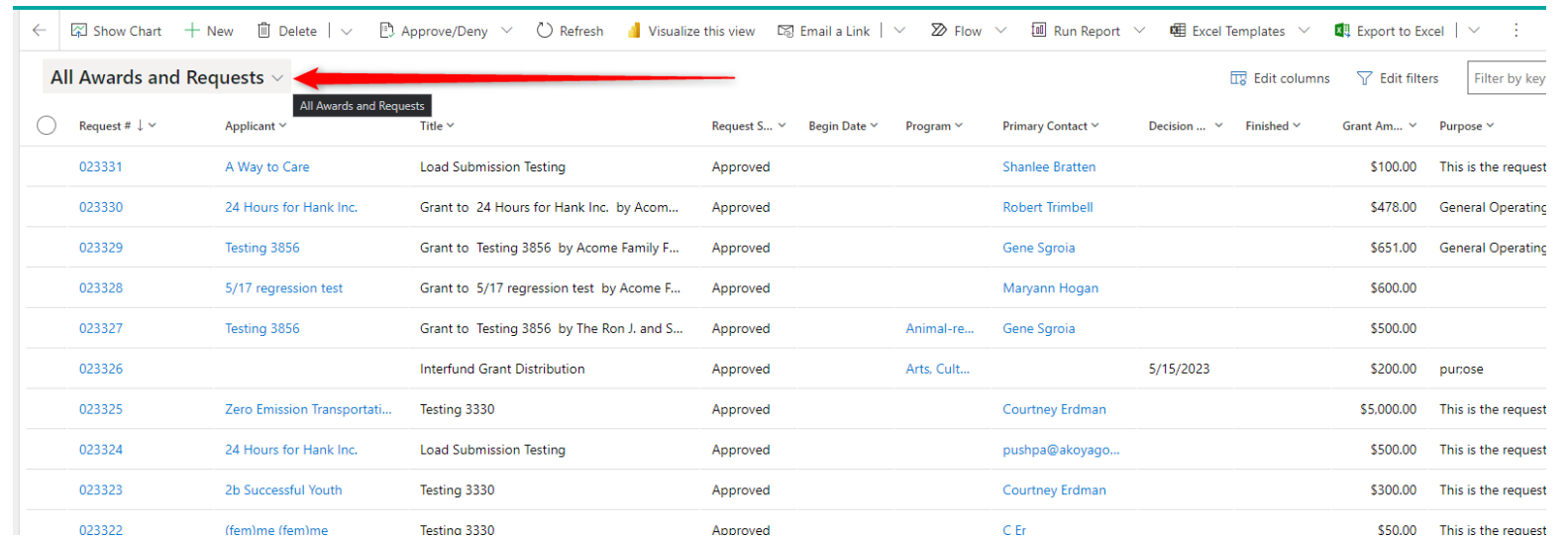
- What types of views exist?
- Where do they live?
- How do I create a new view?

VIEWS AND DASHBOARDS

- Views allow you to see groups of data based on certain filters (criteria)
 - Columns can be selected from the source record or from related records (certain relationships only)
- Views can be saved for future use, exported to excel, or used in reports or flows

VIEWS AND DASHBOARDS

- Saved and Shared views can be accessed from the view selector on any record type
- Views can be shared and managed from this selector as well

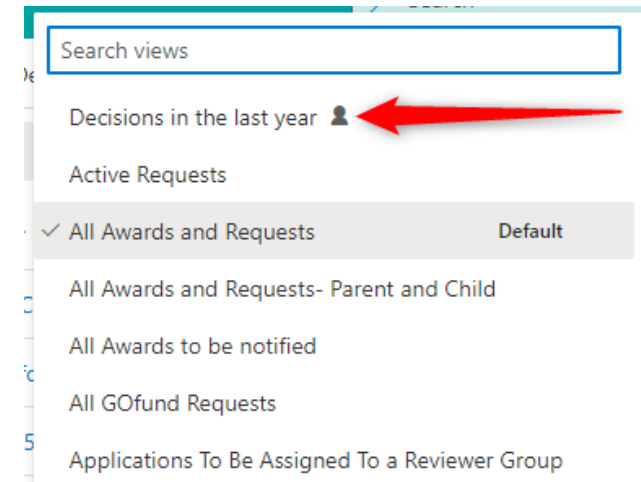


The screenshot displays the AkoyaGO interface with a table titled 'All Awards and Requests'. A red arrow points to the view selector dropdown in the top left corner of the table area, which is currently set to 'All Awards and Requests'. The table contains the following data:

Request #	Applicant	Title	Request Status	Begin Date	Program	Primary Contact	Decision Date	Finished	Grant Amount	Purpose
023331	A Way to Care	Load Submission Testing	Approved			Shanlee Bratten			\$100.00	This is the request
023330	24 Hours for Hank Inc.	Grant to 24 Hours for Hank Inc. by Acome...	Approved			Robert Trimbell			\$478.00	General Operating
023329	Testing 3856	Grant to Testing 3856 by Acome Family F...	Approved			Gene Sgroia			\$651.00	General Operating
023328	5/17 regression test	Grant to 5/17 regression test by Acome F...	Approved			Maryann Hogan			\$600.00	
023327	Testing 3856	Grant to Testing 3856 by The Ron J. and S...	Approved		Animal-re...	Gene Sgroia			\$500.00	
023326		Interfund Grant Distribution	Approved		Arts, Cult...		5/15/2023		\$200.00	purpose
023325	Zero Emission Transportati...	Testing 3330	Approved			Courtney Erdman			\$5,000.00	This is the request
023324	24 Hours for Hank Inc.	Load Submission Testing	Approved			pushpa@akoyago...			\$500.00	This is the request
023323	2b Successful Youth	Testing 3330	Approved			Courtney Erdman			\$300.00	This is the request
023322	(fem)me (fem)me	Testina 3330	Approved			C Er			\$50.00	This is the request

VIEWS AND DASHBOARDS




- KEY CONCEPT: There are two different types of views and dashboards
 - These control visibility
- SYSTEM: shared with all users, akoyaGO provided views are system views
- PERSONAL: unique to you as a user
 - These views can be shared with other users as needed
- Personal views are noted with the head icon in the view selector list.





CREATING AND SAVING VIEWS

KEY CONCEPT: Views allow you to FILTER records to meet a set of logical criteria


Edit filters: Requests


 Reset to default  Download FetchXML  Delete all filters


Showing live data [Change to retained data](#) 



AND 

☐

Select a field 

Equals 

Value 

 Add 

FILTERING DATA

There are different filters available for different field types:

- Number and Currency:
 - Equals
 - Does not equal
 - Is Greater than
 - Is Greater than or equal to
 - Is Less than
 - Is Less than or equal to
 - Contains data
 - Does not contain data
- Text and Choice:
 - Equals
 - Does not equal
 - Contains
 - Does not contain
 - Begins with
 - Does not begin with
 - Ends with
 - Does not end with
 - Contains data
 - Does not contain data

FILTERING DATA

There are different filters available for different field types:

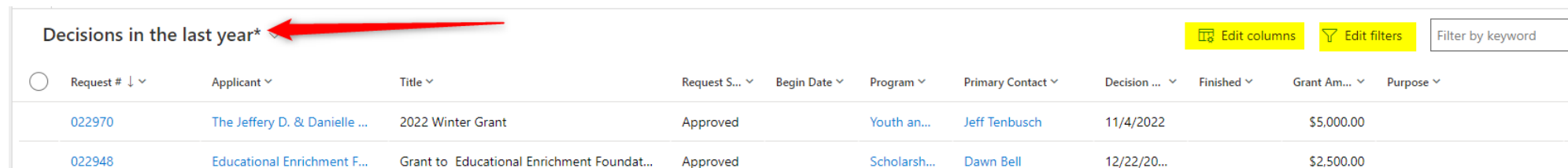
- Date:
 - Equals
 - On
 - On or after
 - On Or Before
 - Yesterday
 - Today
 - Tomorrow
 - Next 7 Days
 - Last 7 days
 - Next week
 - Last week
 - This week
 - Next month
 - Last month
 - This month
 - Next year
 - Last year
 - This year
 - Last x hours
 - Next x hours
 - Last x days
 - Next x days
 - Last x weeks
 - Next x weeks
 - Last x months
 - Next x months
 - Last x years
 - Next x years
 - Older than x minutes
 - Older than x hours
 - Older than x days
 - Older than x weeks
 - Older than x months
 - Older than x years
 - Contains data (Any Time)
 - Does not contain data
 - In fiscal year
 - Last fiscal year
 - This fiscal year
 - Next fiscal year
 - Last x fiscal years
 - Next x fiscal years
 - In fiscal period
 - Last fiscal period
 - This fiscal period
 - Next fiscal period
 - Last x fiscal periods
 - Next x fiscal periods
 - In fiscal period and year
 - In or after fiscal period
 - In or before fiscal period

ADDING/EDITING COLUMNS

- Views can have columns from the selected record, as well as any parent related record
- KEY CONCEPT: Associated records may only be included in views if there is a parental relationship
- EXAMPLE: A request view can include fields from Constituent (Applicant) but not Payments and Requirements

SAVING AND EDITING VIEWS

- Changes to views can be made from the view itself, using the “edit columns” and “edit filters” options
 - Unsaved changes are noted on the view name with an *



The screenshot shows a data table with a header row and two data rows. The view name 'Decisions in the last year*' is at the top left, with a red arrow pointing to it. To the right of the view name are two buttons: 'Edit columns' and 'Edit filters'. Further right is a search bar labeled 'Filter by keyword'. The table has columns for Request #, Applicant, Title, Request Status, Begin Date, Program, Primary Contact, Decision Date, Finished, Grant Amount, and Purpose. The first data row shows request 022970 for 'The Jeffery D. & Danielle ...' with a title of '2022 Winter Grant'. The second data row shows request 022948 for 'Educational Enrichment F...' with a title of 'Grant to Educational Enrichment Foundat...'.

Request # ↓	Applicant ↓	Title ↓	Request S... ↓	Begin Date ↓	Program ↓	Primary Contact ↓	Decision ... ↓	Finished ↓	Grant Am... ↓	Purpose ↓
022970	The Jeffery D. & Danielle ...	2022 Winter Grant	Approved		Youth an...	Jeff Tenbusch	11/4/2022		\$5,000.00	
022948	Educational Enrichment F...	Grant to Educational Enrichment Foundat...	Approved		Scholarsh...	Dawn Bell	12/22/20...		\$2,500.00	

- Changes can be saved by using the options at the bottom of the view selector

- Save changes to current view
 - Save as new view
 - Manage and share views

THANK YOU

Presented By

Zoey Fife

Support Tech Tier III



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