



Share your photos to  
the conference album!

**EMPOWERED**

USER  
CONFERENCE  
2023

# EMPOWERED

USER CONFERENCE 2023

## CRM FOR BEGINNERS

PRESENTED BY  
ZOEY FIFE

# ROADMAP

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

# CRM STRUCTURE

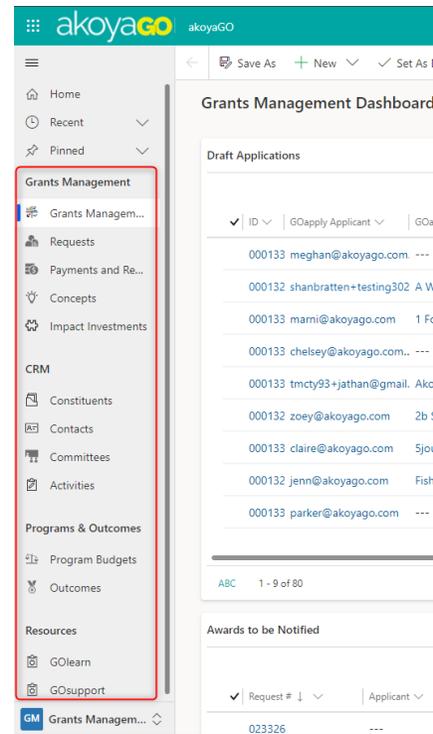
- What types of records exist?
- Where do they live?
- How are they related?

# 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

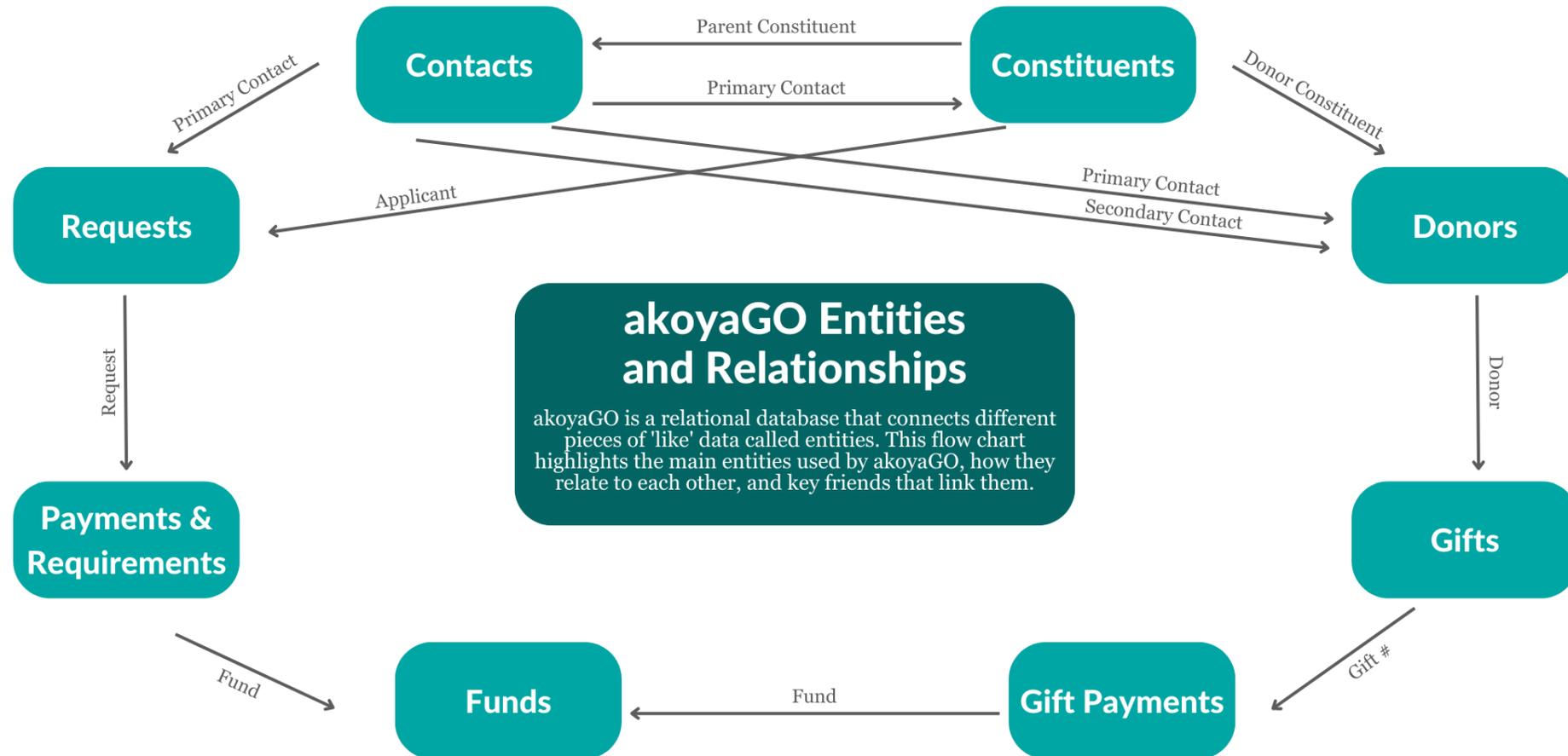
- Database records can be RELATED to one another
  - These relationships allow you to view information across entities
- Relationships are set with lookup fields

The screenshot displays a software interface with a form on the left and a dropdown menu on the right. The form has several fields: 'Primary Contact' with a dropdown arrow, 'Request Type' with a red asterisk and the value 'Interfund', 'Program' with a blue plus sign and the value 'Arts, Culture', 'Special Request Status' with a dropdown arrow, and 'Finished' with a dropdown arrow. A yellow highlight is on the 'Look for Applicant' field. The dropdown menu is titled 'Constituents' and lists several entries: '(fem)me (fem)me', '(fem)me (fem)me Erin Wanat', '? la port?e des sons inc.', and '1 Foundation Inc. - Headquarters x Jim St. James'. At the bottom of the dropdown are '+ New Constituent' and 'Advanced lookup'. A search bar at the top right of the dropdown says 'Search timeline'.

# 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

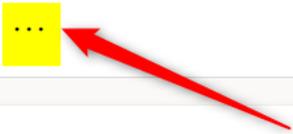
# RELATIONSHIPS

- 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 ...)

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



# CRM VIEWS

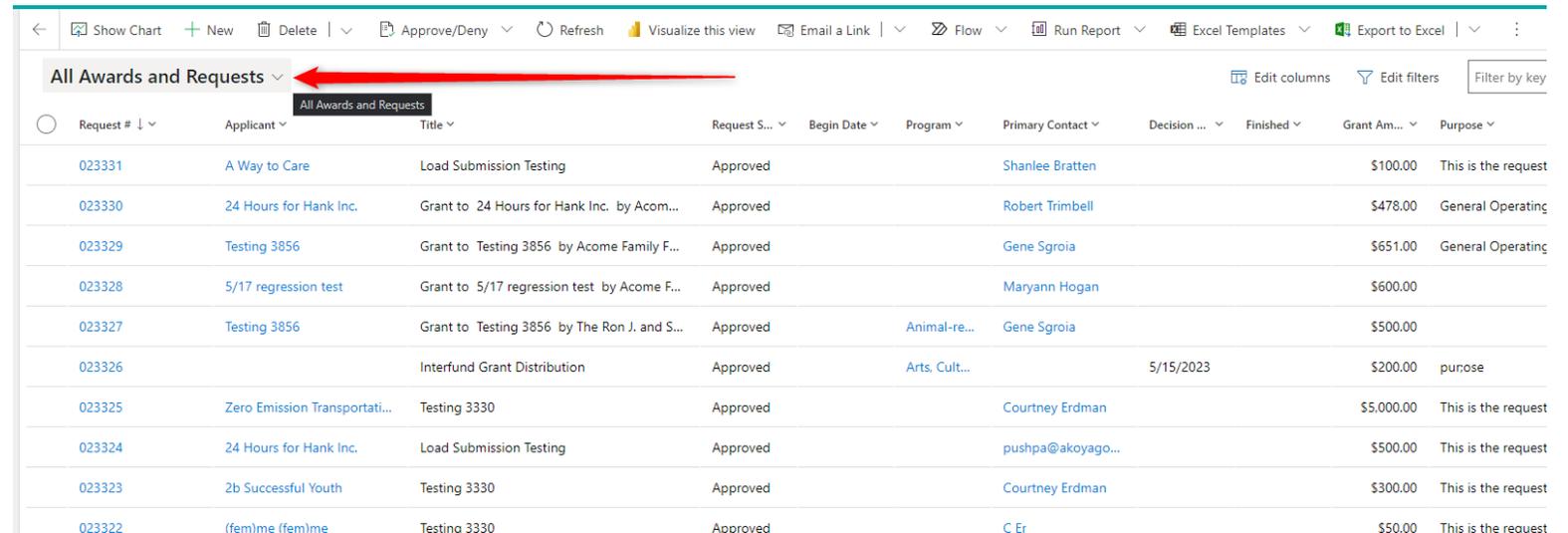
- What types of views exist?
- Where do they live?
- How do I create a new view?

# 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

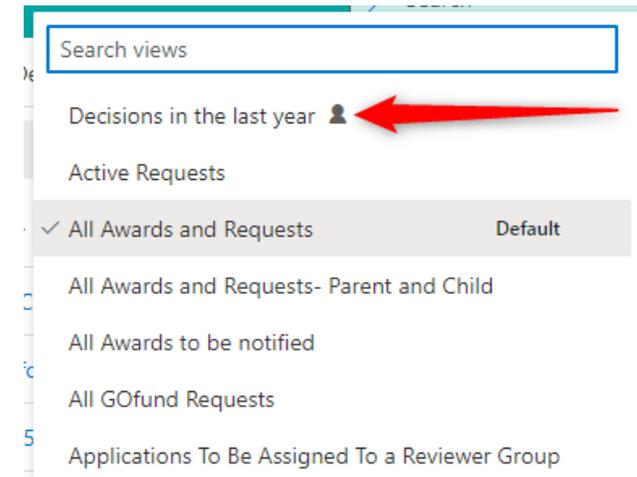


The screenshot displays a data table with the following columns: Request #, Applicant, Title, Request Status, Begin Date, Program, Primary Contact, Decision Date, Finished, Grant Amount, and Purpose. The table contains 13 rows of data, all with a status of 'Approved'. A red arrow points to the view selector dropdown in the top left corner of the table area, which is currently set to 'All Awards and Requests'.

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 Acom...	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     ...

# 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:

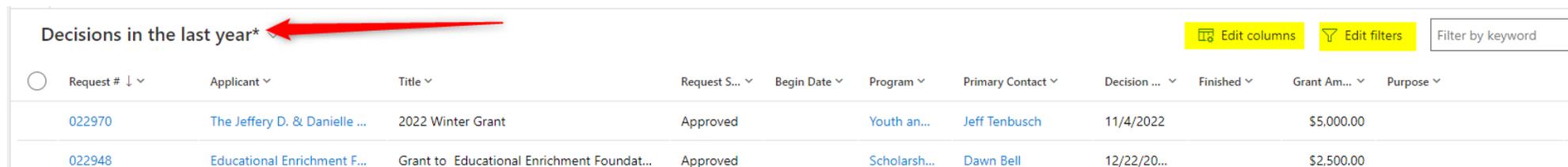
- Date:
  - Equals
  - On
  - On or after
  - On Or Before
  - Yesterday
  - Today
  - Tomorrow
  - Next 7 Days
  - Last 7 days
  - Next week
  - Last week
  - This week
  - Next month
  - Last month
  - This month
  - Next year
  - Last year
  - This year
  - Last x hours
  - Next x hours
  - Last x 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 the following columns: Request #, Applicant, Title, Request S..., Begin Date, Program, Primary Contact, Decision ..., Finished, Grant Am..., and Purpose. The view name 'Decisions in the last year\*' is highlighted with a red arrow. The table contains two rows of data.

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



Share your photos to  
the conference album!

**EMPOWERED**

USER  
CONFERENCE  
2023