

Support Webinar akoyaGO CRM Basics

Agenda

- Navigation - Areas and Tables of akoyaGO
- Searching
 - Dataverse
 - Views/Quick Search
 - Lookup fields
- Constituents and Contacts
- Views and Dashboards

Navigation

- Home, Recent, Pinned
- App launcher
- GOSupport

The screenshot displays the akoyaGO with Accounting interface. The top navigation bar includes a search bar and a user profile icon labeled 'SAND'. The left sidebar contains a navigation menu with sections: Grants Management (Home, Recent, Pinned, 023263), Dashboards, Requests, Funding Opportunities, Payments and Requir..., Scholarships, Interfund Grants, Impact Investments, Programs & Outcomes (Program Budgets, Outcomes), CRM (Constituents, Contacts, Committees, Activities), Mailings (Letter Templates, Mailing Lists), Resources (Business Central, GOSupport), and Grants Management. The main content area is titled 'Grants Management Dashboard' and features three tables: Draft Applications, Pending Requests, and Awards to be Notified. The Draft Applications table lists various grant applications with columns for ID, GOapply User, GOapply Applicant Organization, Current Phase Status, Progress, and GOapply Application Name. The Pending Requests table lists requests with columns for Request ID, Request Type, Submission Accepted, Applicant, and Priority. The Awards to be Notified table lists awards with columns for Request ID, Applicant, Address, Decision, and Grant. The GOSupport link in the sidebar is highlighted with a red box.

Areas and Tables

- **Area**

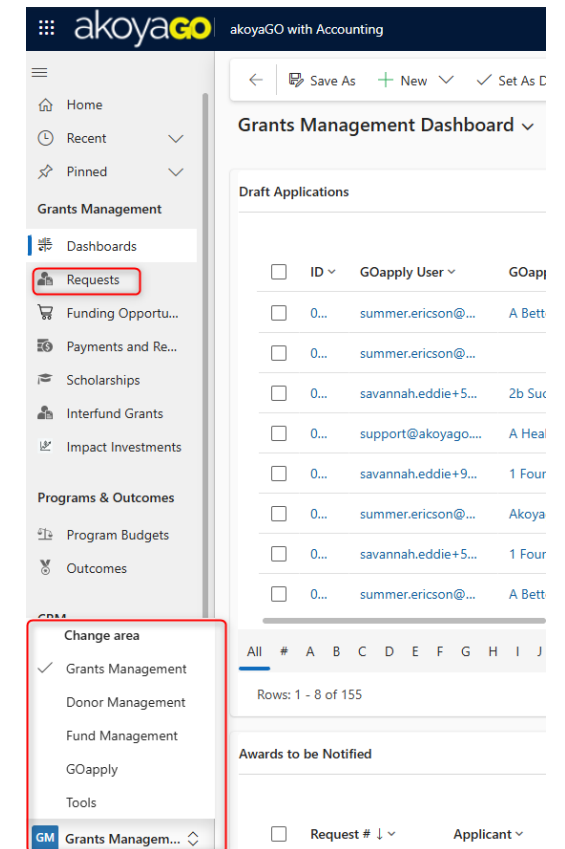
- Grouping of tables within an app dedicated to a specific feature or task
- AKA workplaces or workspaces
- Example: Grants Management

- **Table**

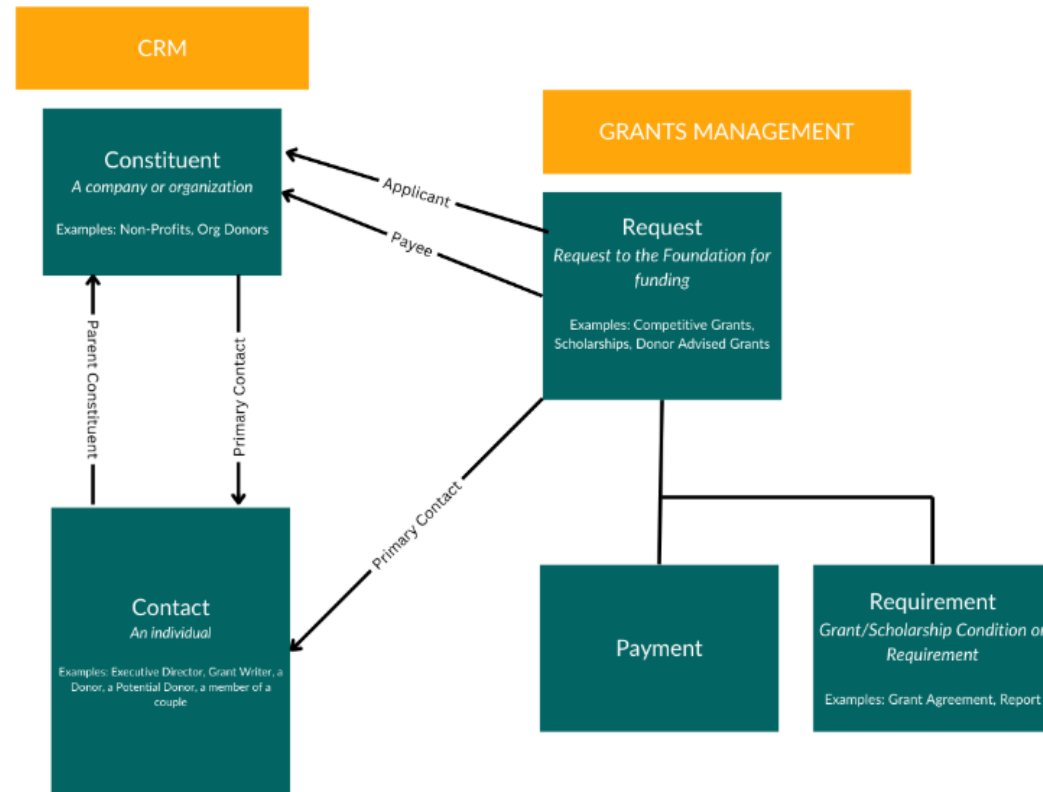
- Used to organize data
- AKA entity
- Consists of rows (records) and columns (fields)
- Example: Requests

Areas of akoyaGO

- **Grants Management**
 - Tables related to managing grants/scholarships
 - Requests to the foundation (grants, scholarships, donor advised grants), Payments and Requirements
- **GOapply**
 - Tables related to GOapply (external applicant portal)
 - GOapply users, Status Tracking, Opportunities, Phases
 - Some permissions within this area are limited to users with GOapply Admin Security Role
- **Tools**
 - Settings, Reports
 - Some permissions within this area limited to users with akoyaGO Admin Security Role
- **Donor Management (with accounting only)**
 - Tables related to fundraising and gifts
 - Donors & Prospects, Donor Opportunities, Gifts, Gift Payments
- **Fund Management (with accounting only)**
 - Tables related to accounting features
 - Funds, Accounts, Interfunds, Scheduled Distributions



Tables of akoyaGO – Grants Management

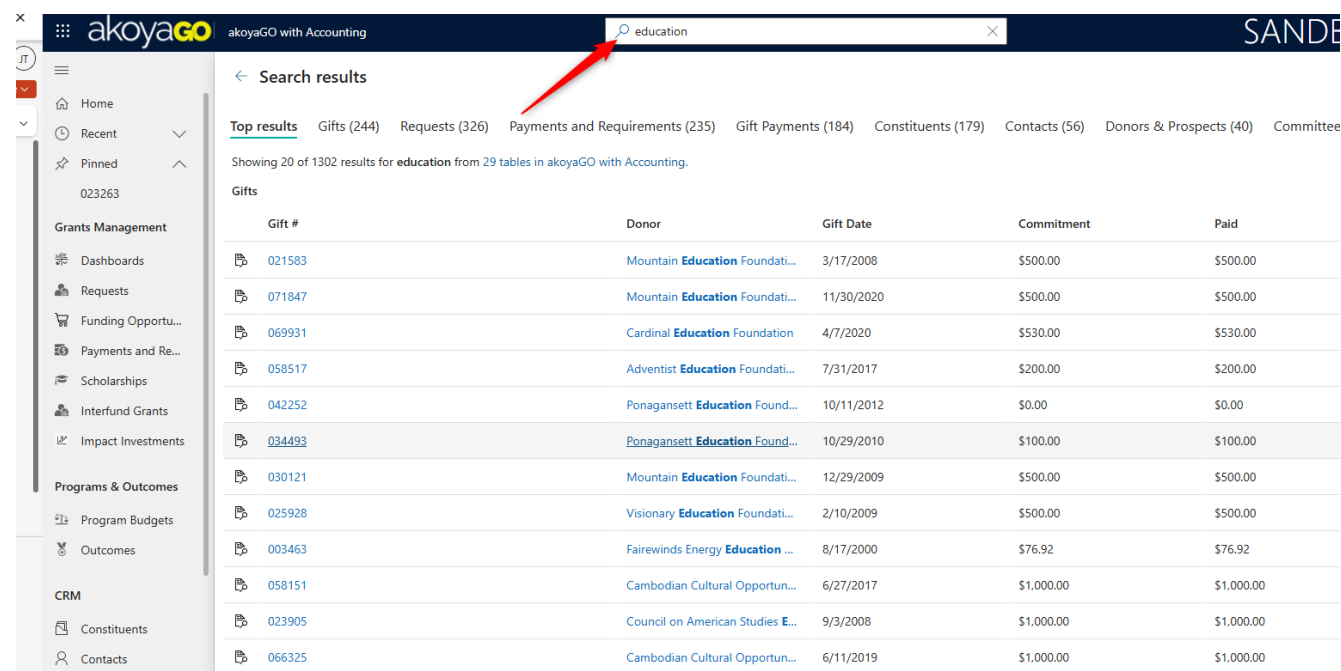


Constituents and Contacts

- Available in all areas of akoyaGO
- Building blocks to get to other tables
- **Constituent**
 - Any organization that interacts with the foundation
 - Examples: non-profits, vendors, organizations that donate or may donate
- **Contacts**
 - Any individual that interacts with the foundation
 - Examples: grant writers, program officers, people who donate/may donate, development officers, etc.

Searching - Dataverse Search

- Quickly find records across **multiple tables**
- Single, relevance sorted list
- Fast and Comprehensive search
- Suggests results as you type
- Order of terms does not matter
- Searches for matches across different columns
- Uses AI to account for misspellings, typos, synonyms



The screenshot shows the akoyaGO web application interface. A search bar at the top right contains the text 'education'. A red arrow points to this search bar. Below the search bar, the 'Search results' section is visible, showing a list of results for 'education' from 29 tables. The results are displayed in a table format with columns: Gift #, Donor, Gift Date, Commitment, and Paid. The table lists 10 results, with the first row highlighted in blue. The table is titled 'Gifts' and shows results for various donors including Mountain Education Foundation, Cardinal Education Foundation, Adventist Education Foundation, Ponagansett Education Foundation, Visionary Education Foundation, and Cambodian Cultural Opportunity.

Gift #	Donor	Gift Date	Commitment	Paid
021583	Mountain Education Foundati...	3/17/2008	\$500.00	\$500.00
071847	Mountain Education Foundati...	11/30/2020	\$500.00	\$500.00
069931	Cardinal Education Foundation	4/7/2020	\$530.00	\$530.00
058517	Adventist Education Foundati...	7/31/2017	\$200.00	\$200.00
042252	Ponagansett Education Found...	10/11/2012	\$0.00	\$0.00
034493	Ponagansett Education Found...	10/29/2010	\$100.00	\$100.00
030121	Mountain Education Foundati...	12/29/2009	\$500.00	\$500.00
025928	Visionary Education Foundati...	2/10/2009	\$500.00	\$500.00
003463	Fairewinds Energy Education ...	8/17/2000	\$76.92	\$76.92
058151	Cambodian Cultural Opportun...	6/27/2017	\$1,000.00	\$1,000.00
023905	Council on American Studies E...	9/3/2008	\$1,000.00	\$1,000.00
066325	Cambodian Cultural Opportun...	6/11/2019	\$1,000.00	\$1,000.00

What is a View?

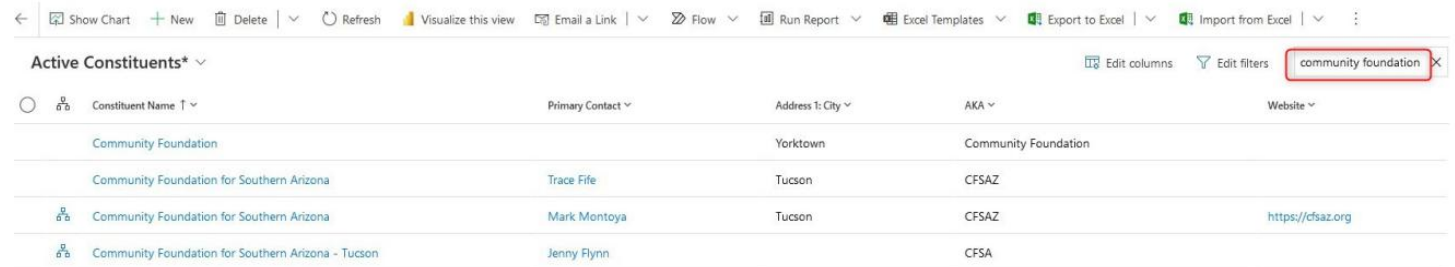
- List presenting data from a table in a customized way
- Allows you to filter, sort, and display data from a table

The screenshot shows a web application interface for managing constituents. On the left is a sidebar menu with a search bar and a list of view options. The main area displays a table of 'Active Constituents' with columns for Primary Contact, Address 1: City, AKA, and Website. The table is filtered by 'Status: Active' and shows 50 rows. The bottom of the page indicates 'Rows: 1 - 50 of 5000+' and 'Page 1'.

Primary Contact	Address 1: City	AKA	Website
Jim St. James	Phoenix	1 Foundation Inc. - Headquarters	https://wish.org/contact-us
Blair St. Charles	Litchfield	1 Foundation Inc. - Litchfeild	http://wish.org/content/faq...
Maria de Campo	Maitland	1 Foundation Inc. - Maitland	https://wish.org/
Marcello Devallio	Houston		
Maise Throllette	Marietta	Sauk Rapids-Rice Education Association	https://tenhope.org
Malcolm Michaels	Lafayette	Kensington Bank	https://100strong.org
Virginia Ashborne	Grenada	Johnson, Moody, Schmidt & Kleinhuizen	https://100strong.org
Sandra Meacher	Harvey	St. Cloud HRA	https://100harveywomen.edu
Michelle DuBarry	Saint Joseph	Jeremiah Program	https://worldvetderm.org
Savannah Eddie	Orlando	Symphonic Orchestra	https://www.orchestra.com
Lucy Lamotte	Superior	A+ Insurance Agency, Inc.	https://arnovichfriends.chari...
Earl Barrington-Shaw	San Jose	Center Of The American Experiment	https://149.armor.gov
Mary Booth	Brunswick	Kanabec Publications	https://17.lincoln.st.com
Darla Pohlak	Buford	Grace United Methodist of Paynesville	https://foundation1969.org

Searching – Quick Search

- Searching records **within a specific view**
- Results are relevant to the current dataset
- Order of search term matters! Can use wildcard * to broaden results



The screenshot shows a web application interface for managing constituents. At the top, there's a navigation bar with various actions like 'Show Chart', 'New', 'Delete', 'Refresh', 'Visualize this view', 'Email a Link', 'Flow', 'Run Report', 'Excel Templates', 'Export to Excel', and 'Import from Excel'. Below this, the 'Active Constituents*' view is selected. A search bar on the right contains the text 'community foundation'. The search results are displayed in a table with the following columns: Constituent Name, Primary Contact, Address 1: City, AKA, and Website.

Constituent Name	Primary Contact	Address 1: City	AKA	Website
Community Foundation		Yorktown	Community Foundation	
Community Foundation for Southern Arizona	Trace Fife	Tucson	CFSAZ	
Community Foundation for Southern Arizona	Mark Montoya	Tucson	CFSAZ	https://cfsaz.org
Community Foundation for Southern Arizona - Tucson	Jenny Flynn		CFSA	

Dataverse vs Quick Search

Dataverse

- Best practice for data entry
- Use if you don't know exactly how something might be entered

Quick Search

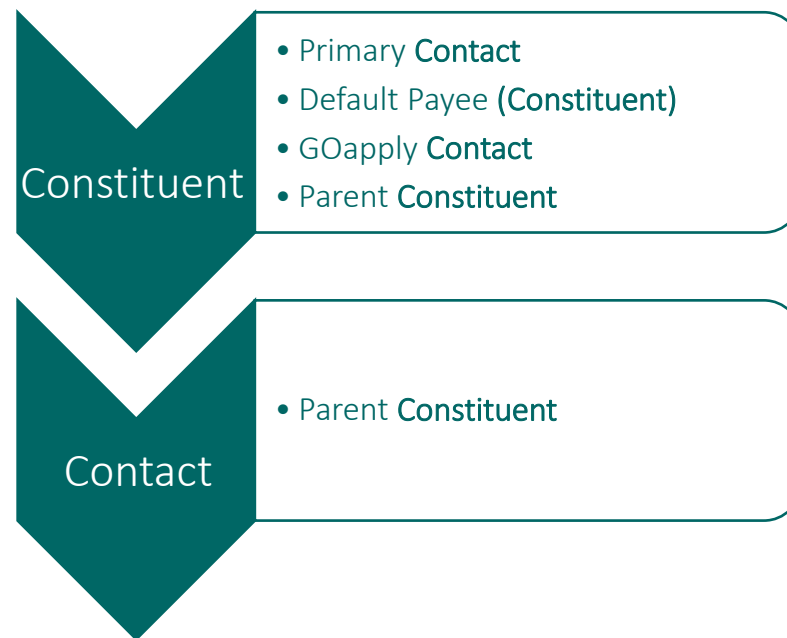
- Use to identify a record within a specific view
- Searching Inactive Records

Data Entry Best Practices Constituents & Contacts

- Start with a dataverse search!
 - Broad search, order of terms don't matter, searching multiple tables
- Go directly to the table and choose +New
- Start by filling in all required fields and hitting save
- Fill in as much information as you can upon entering a record

Lookup Fields

- Creating a relationship between different tables
- Search for record from related table



Searching - Recap

- **Dataverse Search**
 - Broad search
 - Searches across multiple tables
 - Will search for term anywhere in the name
- **Quick Search**
 - More specific search
 - Searches the view you are looking at (which might be filtered!)
 - Term order matters
- **Lookup Fields**
 - Looking up to another table
 - Making connection between two records

Actions from a View

- Generate Letters
 - Buttons specific to the table (i.e. Approve/Deny Request, Add to Review Group, Send to Accounting)
 - Run Flows (table specific)
 - Export to Excel
 - Bulk edit

What is a Dashboard

- Collection of charts and/or views
- Visual representation of data and metrics
- Analytical or process based
- Actions are available on each view within a dashboard
 - See all records to open the full view

Grants Management Dashboard

Draft Applications

ID	GOApply User	GOApply Applicant Organization	Current Phase Status	Progress	GOApply Application Name	GOApply Phase Name
0...	summer.ericson@...	A Better Day Foundation	In Progress	7	Grant Application	LOI
0...	summer.ericson@...		Not Started		Grant Application	LOI
0...	savannah.eddie+5...	2b Successful Youth	In Progress	92	Grant Application	LOI
0...	support@akoyago...	A Healthier You Inc.	In Progress	100	ONBOARDING Grant App	Grant Agreement
0...	savannah.eddie+9...	1 Foundation Inc. - Headquarters	In Progress	57	Family Application	Application
0...	summer.ericson@...	Akoyago	Not Started		Family Application	Application
0...	savannah.eddie+5...	1 Foundation Inc. - Headquarters	Not Started		Grant Application	Final Report
0...	summer.ericson@...	A Better Day Foundation	In Progress	8	Program Grant Application	Jen 12.4.24 Client B...

Rows: 1 - 8 of 155

Awards to be Notified

Request #	Applicant	Address	Address	Address	Address	Address	Decision	Grant A...	Primary Contac
023438	JustFaith Ministries - Health	1717 Allia...	Suites 10 ...	Louisville	KY	40299	5/6/2025	\$305.84	Jack Jezreel
023434	JustFaith Ministries - Health	1717 Allia...	Suites 10 ...	Louisville	KY	40299	5/1/2025	\$652.38	Jack Jezreel
023433							4/29/2025	\$10,000.00	
023432							4/30/2025	\$25,000.00	
023431							4/28/2025	\$1.00	Claire Martin
023430							4/28/2025	\$1.00	Claire Martin
023428							4/23/2025	\$1,000.00	
023427	10th World Congress of V...	123 Appl...	Saint Jose...	MI	49085	4/22/2025	\$234,234...		Michelle Duf

Rows: 1 - 8 of 276

Pending Requests

Re...	Request Ty...	Submission Accepted	Applicant	Primary Contact	Requested Amount	Title
023448	Grant	No	Sjourneys	Primary2 Contact1		
023447	Grant	No	Sjourneys	Primary2 Contact1		
023446	Grant	No	Sjourneys	Primary Contact1		
023439	Grant	No	1 Foundation Inc. - Headquarters	summer.ericson		
023437	Scholarship	No		Andrew Tenn		Scholarship for And
023436	Grant	No	Noah Test Org	Noah Frost	\$1,234.56	Test App - East Bay
023435	Grant	No	Noah	Noah Frost	\$1,000.00	Test Project
023429	Grant	No	Chasing Daylight Animal Shelter	Liz Test	\$1,000.00	Test

Rows: 1 - 8 of 84

Denied to be Notified

Request #	Applicant	Title	Address	Address	Address	Address	Address	Address	Requested...
022987	100 Women...	Shanlee Qu...	413 Springv...	Harvey	IL	60426			\$30,000.00
022999	24 Hours for...	Pushpa Gha...	8891 Mout...	Sandpoint	ID	21210			\$25,000.00
023003	21st Centur...	Dan Brabec ...	9178 Marina...	PO Box 519	Selma	NC	112 20		\$726,420.00
023021	Sjourneys	Claire's Tea...	978 Delawar...	Culver City	CA				\$50,000.00
023022	Sjourneys	Claire's Team	978 Delawar...	Culver City	CA				\$1,000,000.00
023023	Sjourneys	Shanlee - CL...	978 Delawar...	Culver City	CA				\$5,000.00
023027	Sjourneys	Dan - Claire...	978 Delawar...	Culver City	CA				\$40,122.00
023032	Abington H...	2023 Trainin...	0 Jay Way	Chinchilla	PA	230559			\$1,500.00

Rows: 1 - 8 of 41

Types of Views and Dashboards

- Personal
 - Only visible to you unless you share
 - Personal Views indicated by person icon
 - Personal Dashboards will be under the “My Dashboards” section
- System
 - Available system wide to all akoyaGO Users
 - "Out of the Box"
 - Can be edited/created by System Customizers

Create a Personal View

- Edit Filters
 - Criteria
 - **WHAT** records do I want to see?
 - And vs Or
 - Show me all cards that are a spade AND a face card
 - Show me all cards that are a spade OR a face card
- Edit Columns
 - From table
 - From related table (remember those lookup fields!)

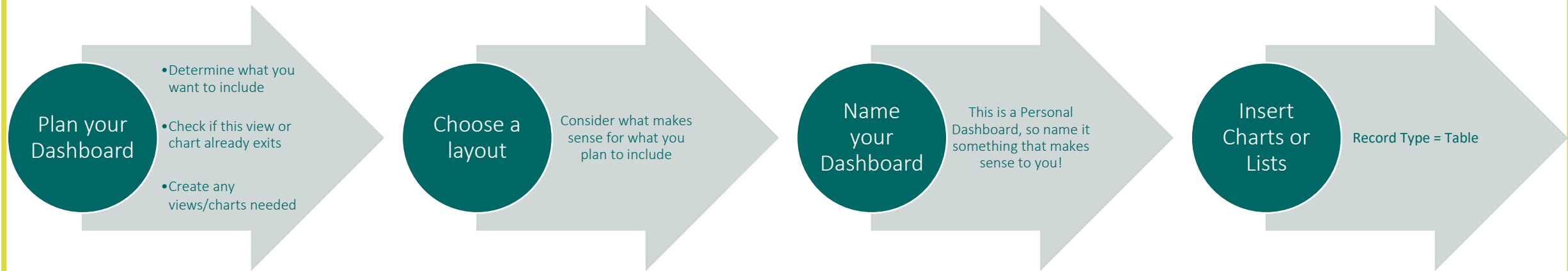
Change Default View for a Table

- Can change the view that you see when you open a table
- Can set this to a Personal or System View
- Changes for you only
- Select your view and choose "Set as default view"

The screenshot shows the AkoyaGO interface. On the left, a dropdown menu is open for the table 'Active Constituents with GuideStar fields'. The menu lists various views, with 'Active Constituents with GuideStar fields' highlighted and marked as 'Default'. At the bottom of the menu, the option 'Set as default view' is highlighted with a red box. The main table on the right displays a list of constituents with columns: Primary Contact, Address 1: City, Foundation Stat..., Deductibility Sta..., and Guidestar Search. The table is filtered by 'Status: Active'.

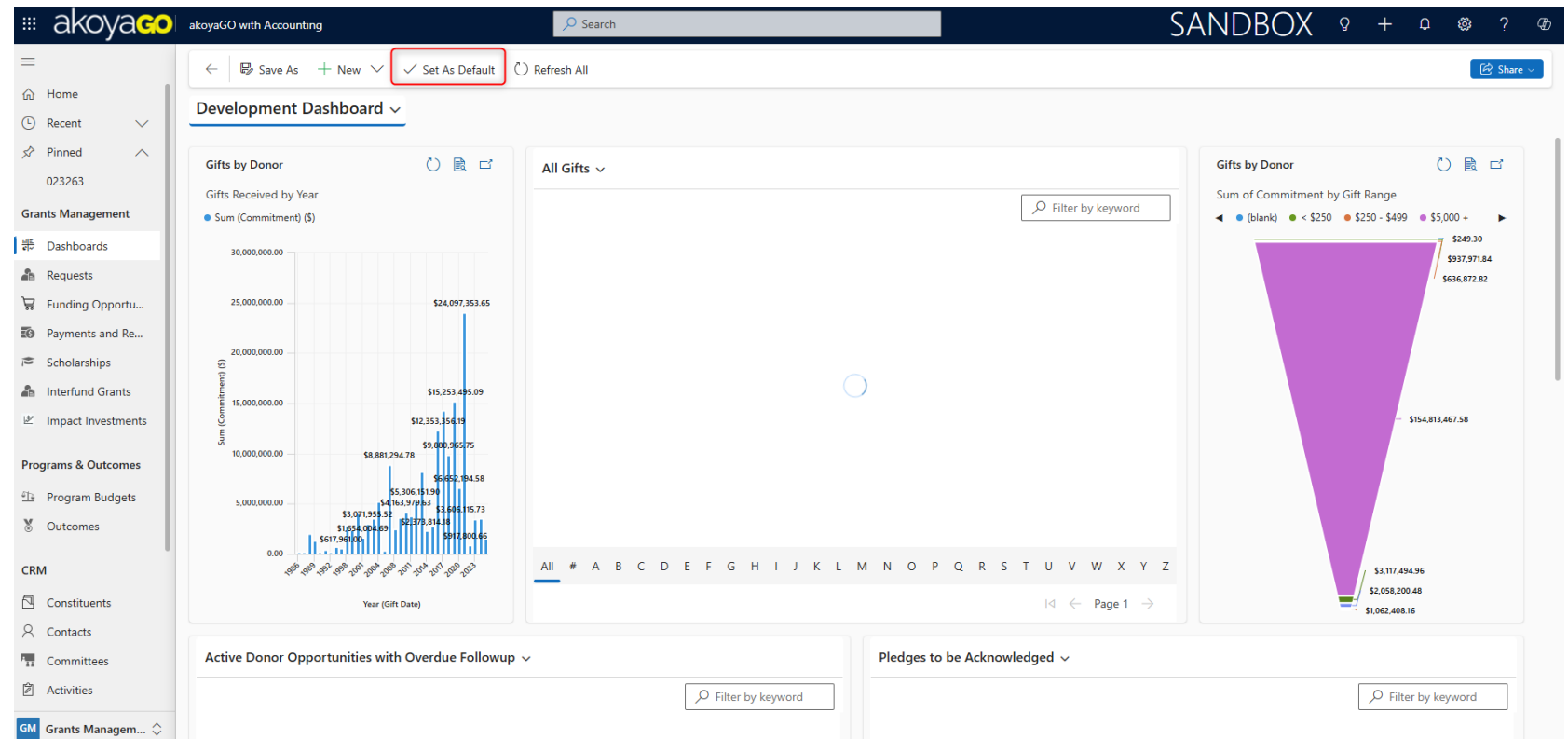
Primary Contact	Address 1: City	Foundation Stat...	Deductibility Sta...	Guidestar Search
Jim St. James	Phoenix	PC	Public charity desc...	
Blair St. Charles	Litchfield	PC	Public charity desc...	
Maria de Campo	Maitland	PC	Public charity desc...	
Marcello Devallo	Houston	PC	Public charity desc...	
Maise Throllette	Marietta	PC	Public charity desc...	
Malcolm Michaels	Lafayette	PC	Public charity desc...	
Virginia Ashborne	Grenada	PC	Public charity desc...	
Sandra Meacher	Harvey			
Michelle DuBarry	Saint Joseph	PC	Public charity desc...	
Savannah Eddie	Orlando	PF	Private non-operat...	
Lucy Lamotte	Superior	PC	Public charity desc...	
Earl Barrington-Shaw	San Jose	N/A	Insufficient data av...	
Mary Booth	Brunswick	PC	Public charity desc...	
Darla Pohlak	Buford	PC	Public charity desc...	

Create a Personal Dashboard



Set your Default Dashboard

- Choose your Default home page
- Can set this to a Personal or System Dashboard
- Changes for you only
- Select dashboard and choose "Set as Default"



Where Can I Find Additional Related Resources?

<https://gosupport.powerappsportals.com>

[GOsupport Portal](#)

[Tables of akoyaGO](#)

[Lookup Fields and Connecting Records in akoyaGO \(Visual\)](#)

[Entering Constituents](#)

[Entering Contacts](#)

[Views and Dashboards](#)

[Views, Search, Command Bar, and Forms](#)



Thank you!

akoyaGO