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akoyaGO CRM NAVIGATION

PRESENTED BY
GAIL SULLIVAN AND JENNIFER TENN

DATAVERSE SEARCH VS. QUICK SEARCH

Which should I use, and when?

Dataverse Search:

- Broad Search - Looks for your search term across every entity in akoyaGO
- Asterisk not needed, ever!
- Best practice for data entry is to start your search with the Dataverse Search

Quick Search:

- Specific Search - Looks for your search term within the **view** you are currently in.
- Asterisk/Wildcard search
- Use quick search if you are looking for a record in a specific view

LOOKUP FIELDS

- Lookup Fields are a type of field that links to another record in akoyaGO
- When searching for a record within a lookup field, treat it like a Quick Search

The screenshot displays the akoyaGO interface for a constituent record. The left sidebar shows navigation options like Home, Recent, Pinned, Grants Management, Programs & Outcomes, and CRM. The main content area shows the profile for 'A Hand Up Foundation Inc.' with tabs for Summary, Organization Details, GOverify, Requests, Impact Investments, Internal Information, and Related. The 'CONSTITUENT INFORMATION' section lists fields such as Account Name, Relationship Type, AKA, Phone, Department, Fax, Institution Type, Website, and Parent Account. The 'General Email' section on the right includes fields for Default Payee, Primary Contact* (highlighted with a red box), GOApply Contact, Primary Contact Salutation, Primary Contact Title, and Sort By. The Primary Contact* field shows a link to 'Quintin Franciottol'.

CONSTITUENT INFORMATION	
Account Name	A Hand Up Foundation Inc.
Relationship Type	---
AKA	Theatre L'Homme Dieu
Phone	156-358-0125
Department	---
Fax	---
Institution Type	educational institution
Website	https://www.tlhd.org
Parent Account	---

General Email	
Default Payee	---
Primary Contact*	Quintin Franciottol
GOApply Contact	---
Primary Contact Salutation	Nicole
Primary Contact Title	Product Engineer
Sort By	A Hand Up Foundation Inc.

PERSONAL VIEWS

- Only visible to the view creator unless you share it
- You can add filters to existing views and adjust view columns to create personal views which you can export to Excel as a spreadsheet
- Grouping/Advanced Filtering

The screenshot shows a web interface for editing filters. At the top, it says 'Edit filters: Payments and Requirements'. Below this are three links: 'Reset to default', 'Download FetchXML', and 'Delete all filters'. A status bar indicates 'Showing live data' with a link to 'Change to retained data' and an information icon. The main area contains a list of filters under an 'AND' group. Each filter has a checkbox, a field name, a comparison operator, and a value. The filters are: 'Requirement Due' with 'Contains data (Any Time)', 'Requirement Received' with 'Does not contain data', and 'Requirement Type' with 'Equals' and 'Final Report'. There is an '+ Add' button at the bottom.

Let's use an example and create it together:
Outstanding Final Reports

OPEN RECORD SET

Click the Paper icon on the top menu bar to quickly move between records in a view

REQUIREMENTS OVERDUE

0050082
A Healthier You Inc.

0050079
304 Geeks Inc.

0050078
3 Pointer Foundation Inc.

0050028
A Healthier You Inc.

0050023
Denver Bears Baseball

0049990
Girl Scouts Heart of the Hud...

0050079 - Saved
Payment or Requirement - Payment or Requirement BPF unlocked

023004
Request #

304 Geeks Inc.
Request Applicant

Requirement Type

Grant Payment Process
Active for 4 months

Create Payment/Requirement (4 Mo)

Requirement Details

Details Internal Information Related

Type Requirement

Payment/Requirement t # 0050079

Request # 023004

Request Applicant 304 Geeks Inc.

Request Contact Meredith Johnson

First Name Meredith

Last Name Johnson

Prefix ---

Method of Contact Any

Email meredith@akoyago.com

Business Phone 7275973100

Interfund Gift ---

PAYMENT DETAIL

Est. Grant Pay Date ---

Payment Status ---

Check # ---

Payment Date ---

Payment Sent ---

Payment Account ---

Reversal Type ---

Reversal Date ---

Reversal Amount ---

Clear Date ---

ACCOUNTING

Department ---

Payable Account ---

Payee 304 Geeks Inc.

Tax ID 27-4428317

Date Exemption Checked 2/2/2023

Tax Status Verified Nonprofit

GOVerify Exempt No

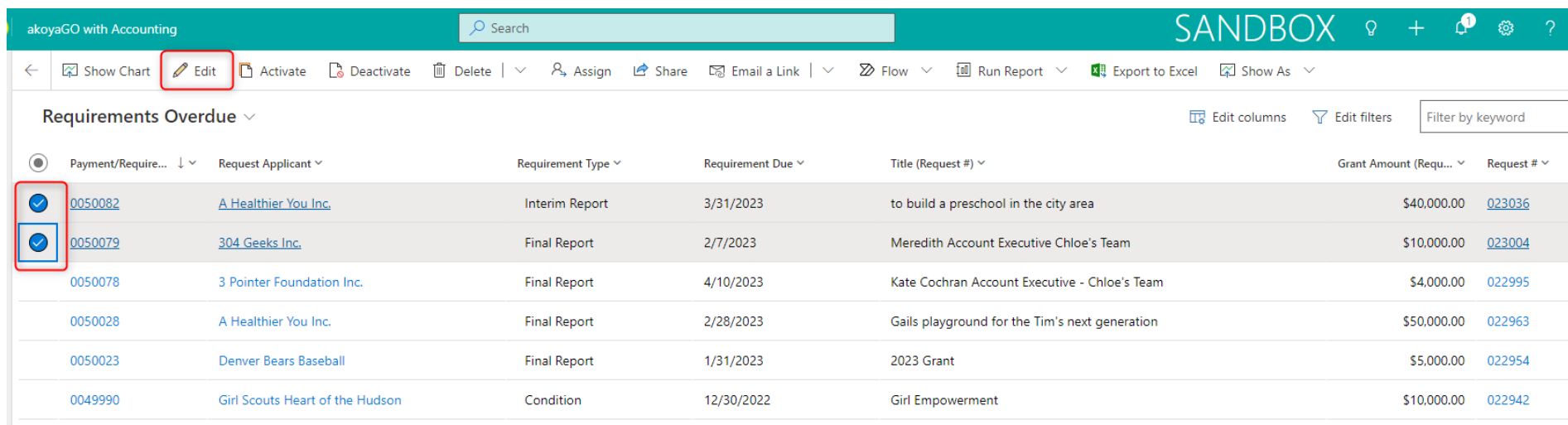
GOVerify Exception ---

Institution Type for profit organization

POSTING DESCRIPTION (MEMO)

BULK EDIT

- To do a bulk edit, select a group of records you want to **update with the same value** and click Edit
 - For example: Requirement Received



akoyaGO with Accounting

Search

SANDBOX

← Show Chart Edit Activate Deactivate Delete Assign Share Email a Link Flow Run Report Export to Excel Show As

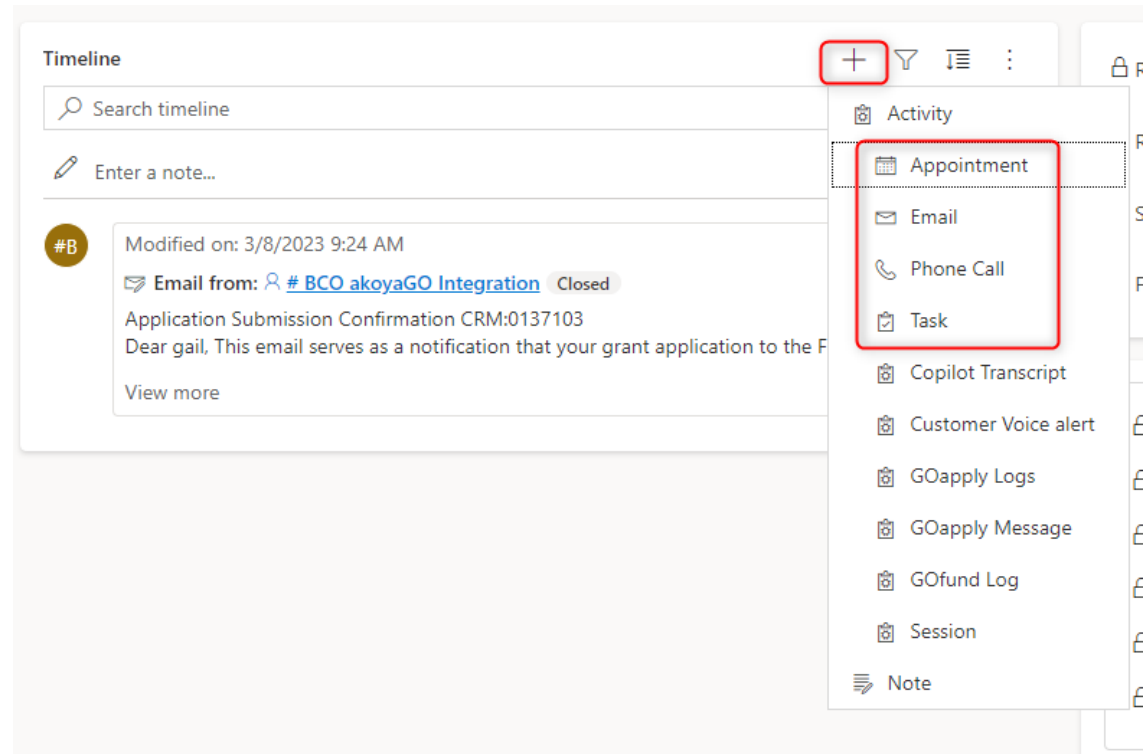
Requirements Overdue

Edit columns Edit filters Filter by keyword

Payment/Require...	Request Applicant	Requirement Type	Requirement Due	Title (Request #)	Grant Amount (Requ...	Request #
<input checked="" type="checkbox"/> 0050082	A Healthier You Inc.	Interim Report	3/31/2023	to build a preschool in the city area	\$40,000.00	023036
<input checked="" type="checkbox"/> 0050079	304 Geeks Inc.	Final Report	2/7/2023	Meredith Account Executive Chloe's Team	\$10,000.00	023004
0050078	3 Pointer Foundation Inc.	Final Report	4/10/2023	Kate Cochran Account Executive - Chloe's Team	\$4,000.00	022995
0050028	A Healthier You Inc.	Final Report	2/28/2023	Gails playground for the Tim's next generation	\$50,000.00	022963
0050023	Denver Bears Baseball	Final Report	1/31/2023	2023 Grant	\$5,000.00	022954
0049990	Girl Scouts Heart of the Hudson	Condition	12/30/2022	Girl Empowerment	\$10,000.00	022942

ACTIVITY MANAGEMENT

- You can create an activity on the timeline of any record in akoyaGO
- You can assign these activities to your colleagues
 - They will appear under view My Activities




ASSIGNING ACTIVITIES TO YOUR COLLEAGUES

- If you change the Owner of the activity to be one of your colleagues, it will assign the task to them
- You can also set a due date

Call Gail about grant proposal - Saved

Phone Call · Phone Call ▾

Phone Call Related ▾

Normal Priority	6/23/2023 8:00 AM Due	Open Status	 Alyson Belvin Owner	▾
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Subject * Call Gail about grant proposal

Call From *  Alyson Belvin

Call To *  Gail Sullivan

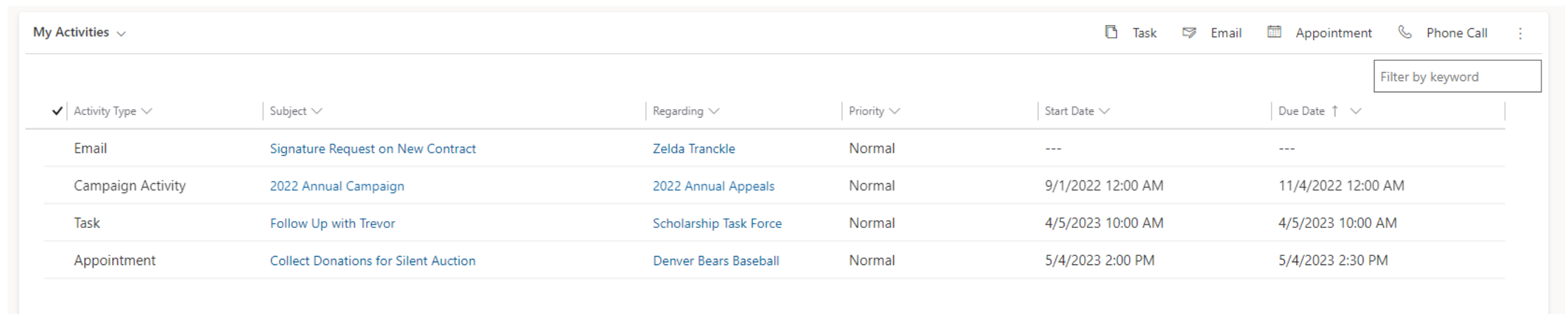
Phone Number ---

Direction

Outgoing

VIEWING YOUR ACTIVITIES

- The view My Activities will show you only activities assigned to your specific user account
- When new activities are assigned to you, they will appear here



The screenshot displays the 'My Activities' section of a user interface. At the top, there's a header with 'My Activities' and a dropdown arrow. To the right, there are icons for 'Task', 'Email', 'Appointment', and 'Phone Call', followed by a 'Filter by keyword' input field. Below this is a table with columns: 'Activity Type', 'Subject', 'Regarding', 'Priority', 'Start Date', and 'Due Date'. The table contains four rows of activity data.

✓ Activity Type ▾	Subject ▾	Regarding ▾	Priority ▾	Start Date ▾	Due Date ↑ ▾
Email	Signature Request on New Contract	Zelda Tranckle	Normal	---	---
Campaign Activity	2022 Annual Campaign	2022 Annual Appeals	Normal	9/1/2022 12:00 AM	11/4/2022 12:00 AM
Task	Follow Up with Trevor	Scholarship Task Force	Normal	4/5/2023 10:00 AM	4/5/2023 10:00 AM
Appointment	Collect Donations for Silent Auction	Denver Bears Baseball	Normal	5/4/2023 2:00 PM	5/4/2023 2:30 PM

QUESTIONS?

THANK YOU

Presented By

Gail Sullivan

Manager of Client Implementation



Share your photos to
the conference album!

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