

EMPOWERED

2025 | USER CONFERENCE | DETROIT, MI

AUTOMATING NOTIFICATIONS WITH PROCESS WORKFLOWS

Presented By
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akoyago

LEARNING OBJECTIVES

1. Learn how to automate notifications for staff and applicants at key points in a process
2. Explore workflow examples, including award notifications, status updates, and reminders
3. Build workflows step-by-step using the workflow editor
4. Create effective email templates with best practices for clarity and engagement

LET'S GET STARTED

- Must be a System Customizer in your akoyaGO Environment
 - System Customizer gives you access to PowerApps, which is the “behind the curtain” of your CRM.

Best Practice

It's encouraged to have a limited number of Users as System Customizers and have those Users communicate with each other and impacted staff before making changes.

CRM Email Templates

- Enhanced Editor in CRM
 - Add Images
 - Rich Text Editor
 - Simple Interface
- Can be used as an “insert template” in CRM Emails
- Can be edited directly in CRM and updates related workflows
- Can be connected to an automated workflow (does not allow draft email option from process workflows)
- Dynamic Text Values can only be pulled from the Table you Send From

Workflow Body

- Can send email or create draft option
- Dynamic Text Values can be pulled from related tables
- Not as many design options
- Only accessible from Power Apps
- Any verbiage changes require deactivation of the workflow process

Allow Rich Text

Allow Dynamic Fields

Include Subject Line

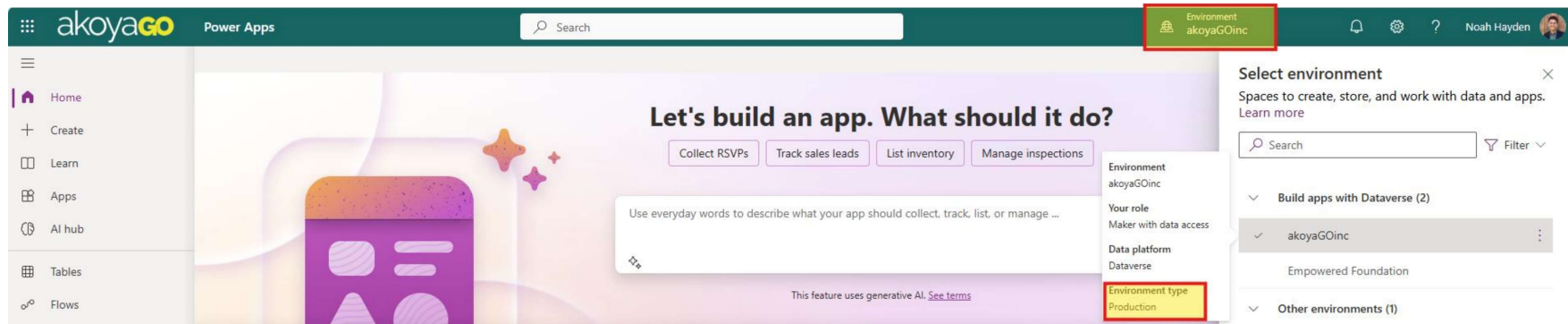
Can be tracked with Dynamics 365

UNDERSTANDING WORKFLOWS

UNDERSTANDING WORKFLOWS

- make.powerapps.com

—Ensure you are in your akoyaGO / “Production” environment



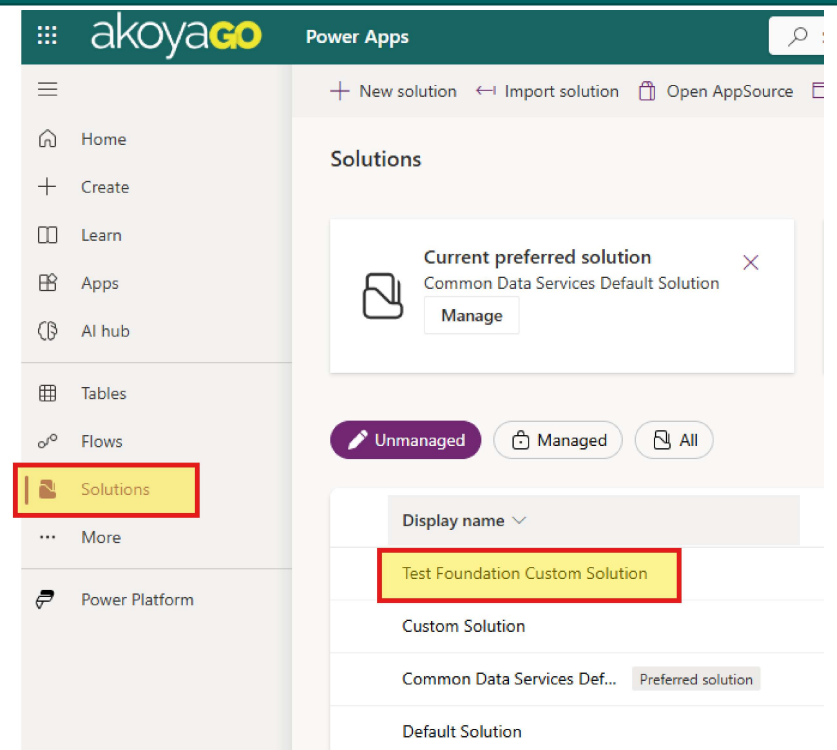
UNDERSTANDING WORKFLOWS

- Solutions
 - Ensure you are in your akoyaGO / “Production” environment
 - Open your foundation’s custom solution

Best Practice

Create all customizations in a custom solution to differentiate from out-of-the-box features.

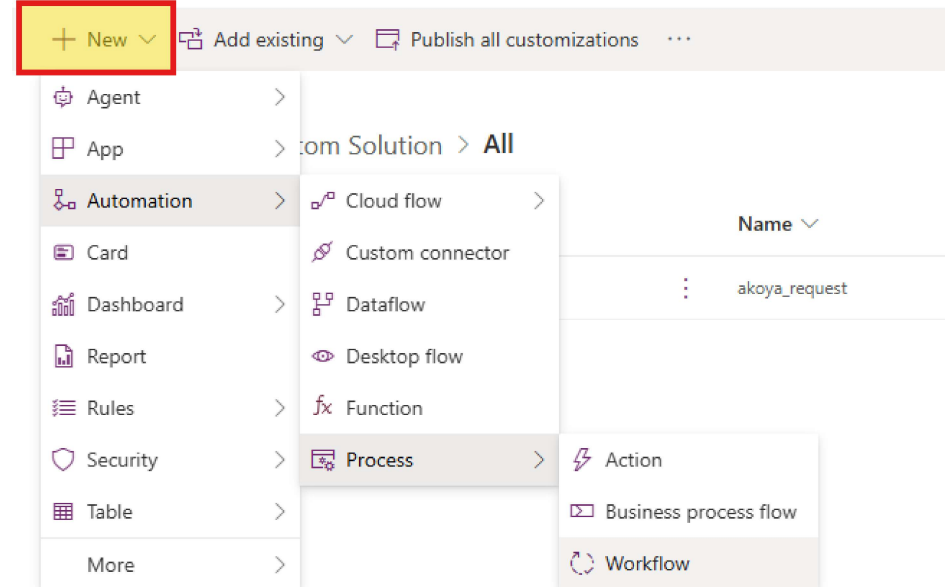
[Custom Solution Knowledge Article](#)



UNDERSTANDING WORKFLOWS

- Create a New Process

- Click +New
- Automation
- Process
- Workflow



UNDERSTANDING WORKFLOWS

- Create a New Process
 - Name your process
 - Select the table you want to run this process on
 - Run workflow in the background (default)
 - Start from Blank
 - Click Create

Best Practice

When naming custom processes, start the name with “*Your Organization’s Acronym* -”.

New workflow ✕

Display name *

Table *

Run workflow in the background (recommended)

ⓘ Power Automate supports asynchronous flows, create Automated, Instant, and Scheduled.

Start from

Blank

Template

UNDERSTANDING WORKFLOWS

- Create a New Process
 - Switch the Scope to Organization
 - Now, this workflow will be available to the full staff.

Entity: Mailing List Member

Category: Workflow

Options for Automatic Processes

Scope: User

Start when:

- User
- Business Unit
- Parent: Child Business Units
- Organization**

Record is deleted

UNDERSTANDING WORKFLOWS

- Create a New Process
 - Determine how you want this flow to run:
 - As an on-demand process
 - When a record is created
 - When a record status changes
 - When a record is assigned
 - When record fields change
 - When a record is deleted

Available to Run

- Run this workflow in the background (recommended)
- As an on-demand process
- As a child process

Options for Automatic Processes

- Scope:
- Start when:
- Record is created
 - Record status changes
 - Record is assigned
 - Record fields change
 - Record is deleted

UNDERSTANDING WORKFLOWS

Workflow Triggers

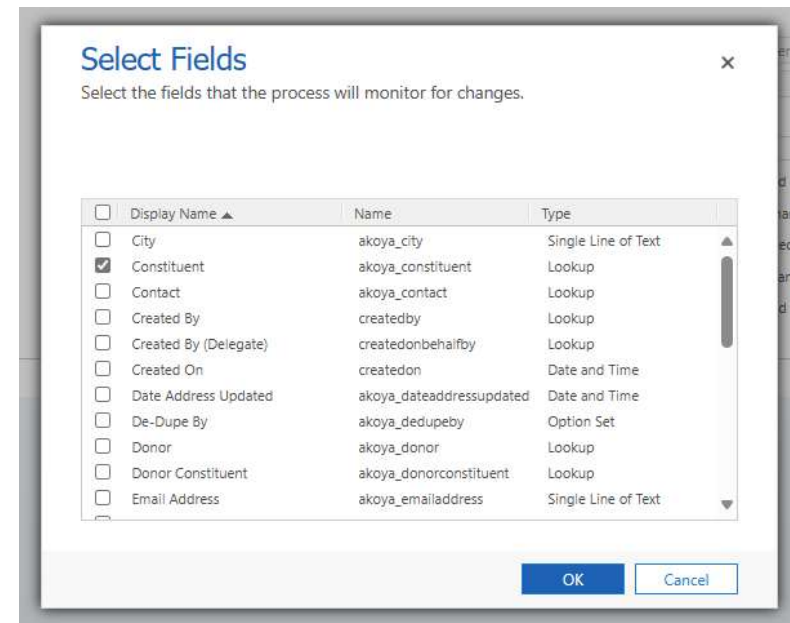
- Automatic
- On Demand (Manual)
- Both
 - Runs automatically and can be manually triggered as well

Common Use Cases

- Automatic
 - Confirmation email
 - Report reminders
 - Internal staff notifications
- On Demand (Manual)
 - Award Emails
 - Requests for more information
 - Donation Acknowledgement in special circumstances
- Both
 - When, in addition to an automatic trigger, we have an exception to run manually (report reminders).

UNDERSTANDING WORKFLOWS

- Create a New Process
 - If selecting when record fields change, select which field changes should trigger this workflow to run.

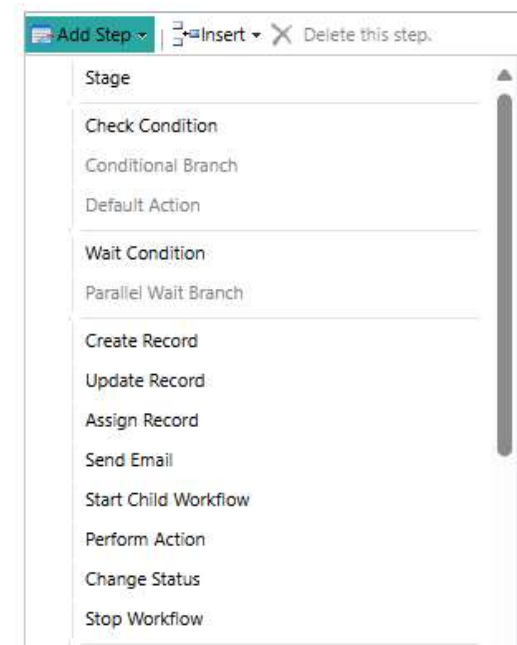


Understanding Workflows

- Create a New Process

- What action do you want performed?

- **Check Condition:** Used to determine if the record satisfies the criteria of the flow
 - **Wait Condition:** Used when you want the flow's action to wait until a criterion has been met
 - **Create Record:** Used when creating email drafts
 - **Send Email:** Used when the email should be sent immediately



SCENARIO 1

Sending an Email using
a CRM Workflow

CREATING A CRM EMAIL TEMPLATE

CRM EMAIL TEMPLATES

- CRM Email Templates
 - Tools area → Email Templates
 - Click +New

The screenshot displays the akoyaGO interface in a 'SANDBOX' environment. The left-hand navigation menu includes 'akoyaGO Setup' with 'Email Templates' highlighted, and 'GOfund' with 'Tools' highlighted. The main content area shows a table titled 'All Email Templates' with a search bar and a 'Filter by keyword' option. The table has columns for 'Title', 'Template Ty...', 'Viewable By', 'Language', and 'Repl...'. The table lists several templates, including 'Account Reconnect', 'Bulk Deletion Task Completed With Failure...', 'Bulk Deletion Task Completion Template', 'Bulk Deletion Task Failed Template', and 'Case Auto Response'. The bottom of the table indicates 'Rows: 87'.

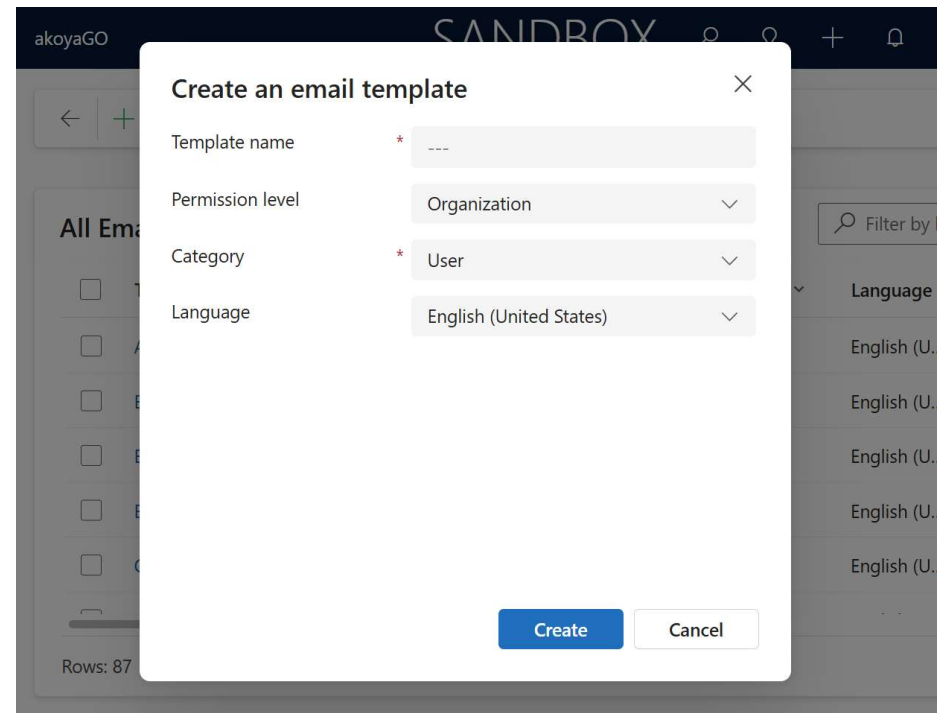
<input type="checkbox"/>	Title ↑	Template Ty...	Viewable By	Language	Repl...
<input type="checkbox"/>	Account Reconnect	Constituent	Organization	English (U...	
<input type="checkbox"/>	Bulk Deletion Task Completed With Failure...	System Job	Organization	English (U...	
<input type="checkbox"/>	Bulk Deletion Task Completion Template	System Job	Organization	English (U...	
<input type="checkbox"/>	Bulk Deletion Task Failed Template	System Job	Organization	English (U...	
<input type="checkbox"/>	Case Auto Response	Case	Organization	English (U...	

CRM EMAIL TEMPLATES

- Creating the Template
 - Name your template
 - Permission level
 - Category
 - Language

Best Practice

When naming custom email templates, start the name with “*Your Organization’s Acronym* -”.



The screenshot shows a 'Create an email template' dialog box overlaid on a CRM interface. The dialog box has a title bar with a close button (X) and contains the following fields:

- Template name: A text input field with a red asterisk (*) indicating it is required, currently containing three dashes (---).
- Permission level: A dropdown menu currently set to 'Organization'.
- Category: A dropdown menu with a red asterisk (*) indicating it is required, currently set to 'User'.
- Language: A dropdown menu currently set to 'English (United States)'.

At the bottom of the dialog box, there are two buttons: a blue 'Create' button and a white 'Cancel' button with a grey border. The background interface shows a table of email templates with columns for checkboxes, names, and languages, and a search filter on the right.

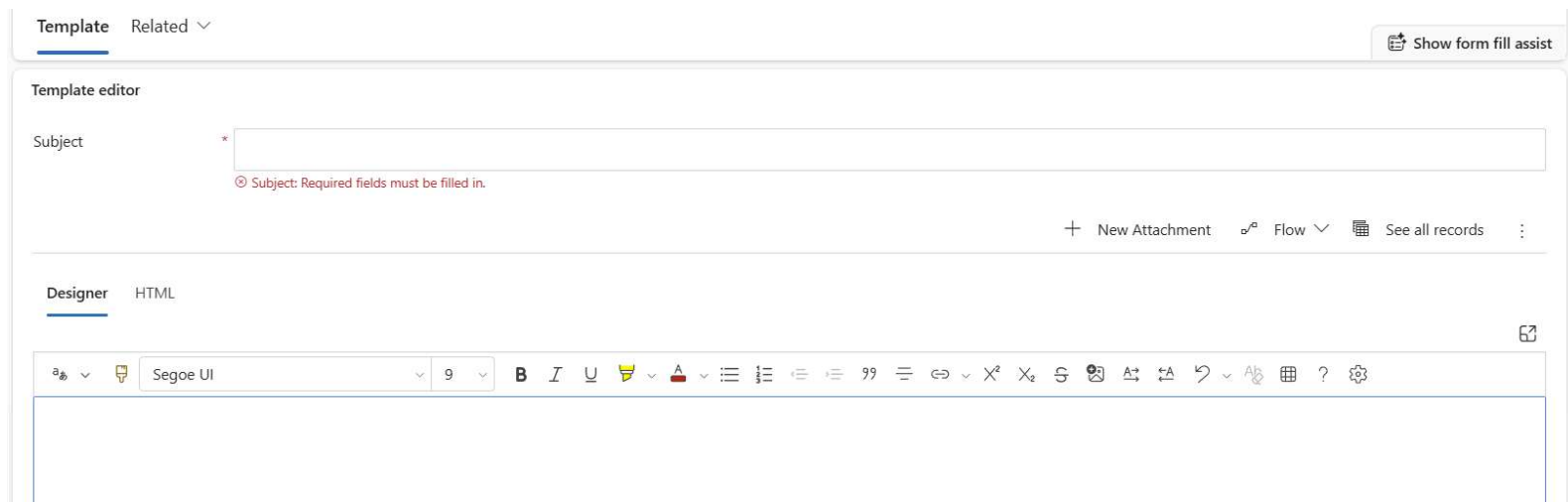
CRM EMAIL TEMPLATES

- Enter a Subject for this email.
 - This will be the Subject line for all emails sent to specified recipients.

The screenshot shows a CRM interface for configuring an email template. At the top, there is a header with a circular icon containing 'E2', a dropdown menu for 'Email Template: Template', and the title 'Empowered 2025 - Newsletter Emai...'. Below the header are tabs for 'Template', 'Editor (Preview)', 'Attachments', and 'Related'. The 'Details' section contains several fields: 'Name' (Empowered 2025 - Newsletter Email Template), 'Permission level' (Organization), 'Category' (User), 'Language' (English (United States)), and 'Description' (---). A separate 'Subject' field is located below, containing 'Empowered Foundation - Quarter 1 Newsletter'. A red error message at the bottom of the subject field reads: 'Subject: Required fields must be filled in.'

CRM EMAIL TEMPLATES

- Begin designing your email template
 - Use the Toolbar to edit Rich Text, Insert Images, or Format Spacing



CRM EMAIL TEMPLATES

- Dynamic content
 - For custom entities or fields, you need to follow a specific syntax

[Dynamic Values in Email Templates Knowledge Article](#)

The screenshot shows a CRM interface for configuring an email template. At the top, it says 'Test - Saved' and 'Email Template · Template'. Below this are tabs for 'Template', 'Editor', 'Attachments', and 'Related'. The 'Template' tab is active. Under the 'Details' section, there are several fields:

Name	*	Test
Permission level		Individual
Category	* 🔒	User
Language	*	English (United States)
Description		GOapply Invite
Subject	*	GOapply Invitation {!User:Full Name;}

CRM EMAIL TEMPLATES

- Begin designing your email template
 - Attachments
 - Upload directly from files on your computer
 - Will attach a file to all email recipients
- Save & Close!



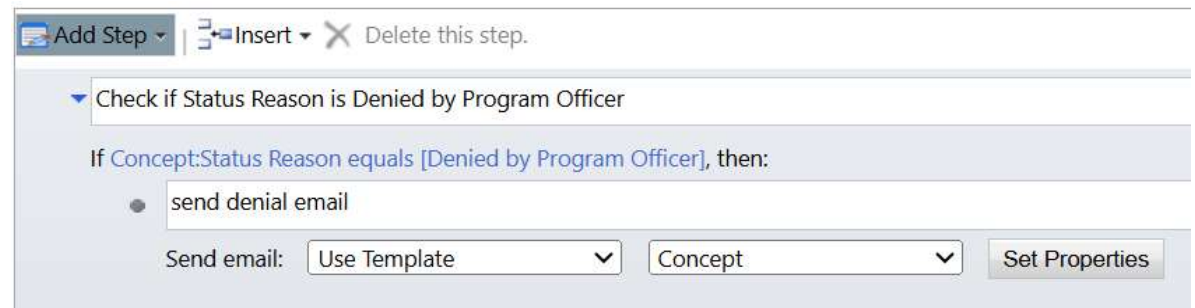
BUILDING A WORKFLOW TO SEND AN EMAIL

EXAMPLE 1: SEND USING A CRM TEMPLATE

- Create a New Process
 - Create a "Check Condition" that fits your ideal scenario.
 - When sending an email using a workflow, select "Send Email" as the step.
 - Select "Use Template" to use a CRM template, and the entity will default to the entity the workflow is built on.

Best Practice

Utilize the white text area to describe the action that is being performed.



The screenshot displays a workflow configuration interface. At the top, there are three buttons: 'Add Step', 'Insert', and 'Delete this step'. Below this, a step is defined with the condition 'Check if Status Reason is Denied by Program Officer'. Underneath the condition, it states 'If Concept:Status Reason equals [Denied by Program Officer], then:'. A radio button is selected next to the text 'send denial email'. Below this text, there are two dropdown menus: 'Send email:' with 'Use Template' selected, and 'Concept:' with 'Concept' selected. A 'Set Properties' button is located to the right of the dropdowns.

EXAMPLE 1: SEND USING A CRM TEMPLATE

- Create a New Process

- Click “Set Properties” to determine which User will send the email.

- If this email should always come from the same User, enter their name.

Process: Empowered 2025 - Send Quarterly Newsletter
Send Email Using Template

From

To

Cc

Bcc

Template Type

noah

Noah Frost	+1 612 389 0705
Noah Hayden	+1 612 336 5060

[Look Up More Records](#)

EXAMPLE 1: SEND USING A CRM TEMPLATE

- Create a New Process
 - Click “Set Properties” to determine which User will send the email.
 - Dynamically pull in a User that is assigned to this record

Form Assistant

Dynamic Values

Dynamic Values

Operator: Set to

Look for: Mailing List Member

Owner

Created By

Created By (Delegate)

Modified By

Modified By (Delegate)

Owner

Owning User

Default value:

OK

Click Add to create the Dynamic Text.

Form Assistant

Dynamic Values

Dynamic Values

Operator: Set to

Look for: Mailing List Member

Owner

Add

Owner(Mailing List Member)

Default value:

OK

Click OK to insert the Dynamic Text.

Process: Empowered 2025 - Send Quarterly Newsletter

Send Email Using Template

From: Owner(Mailing List Member)

To:

Cc:

Bcc:

Template Type: Global Template

Email Templates: All Language Email Templates

Title	Template Type
Deprecated - Gódonate Donation Confirmation ...	Global
Empowered 2025 - Newsletter Email Template	Global
GOapply - Approval/Denial Email Response to R...	Global

Form Assistant

Dynamic Values

Dynamic Values

Operator: Set to

Look for: Mailing List Member

Owner

Add

Owner(Mailing List Member)

Default value:

OK

EXAMPLE 1: SEND USING A CRM TEMPLATE

- Create a New Process
 - Within “Set Properties”, determine who receives the email
 - Dynamically pull in a recipient that is assigned to this record, and ensure this record has an email associated with them

From: [Owner(Mailing List Member)]

To: [Mailing List Member(Mailing List Member)]

Cc: []

Bcc: []

Template Type: Global Template

Email Templates All Language Email Templates

Search for records

Run Workflow... Start Dialog

Title ↑	Template Type	Descriptor
Deprecated - GOdonate Donation Confirmation ...	Global	
Empowered 2025 - Newsletter Email Template	Global	
GOapply - Approval/Denial Email Response to R...	Global	This email is sent to

Form Assistant

Dynamic Values

Operator:

Set to: []

Look for: [Mailing List Member]

Mailing List Member

Add

Mailing List Member(Mailing List M

Default value: []

OK

EXAMPLE 1: SEND USING A CRM TEMPLATE

- Create a New Process
 - Within “Set Properties”, select your email template
 - Then click “Save and Close” within this window

Process: Empowered 2025 - Send Quarterly Newsletter

Send Email Using Template

From:

To:

Cc:

Bcc:

Template Type:

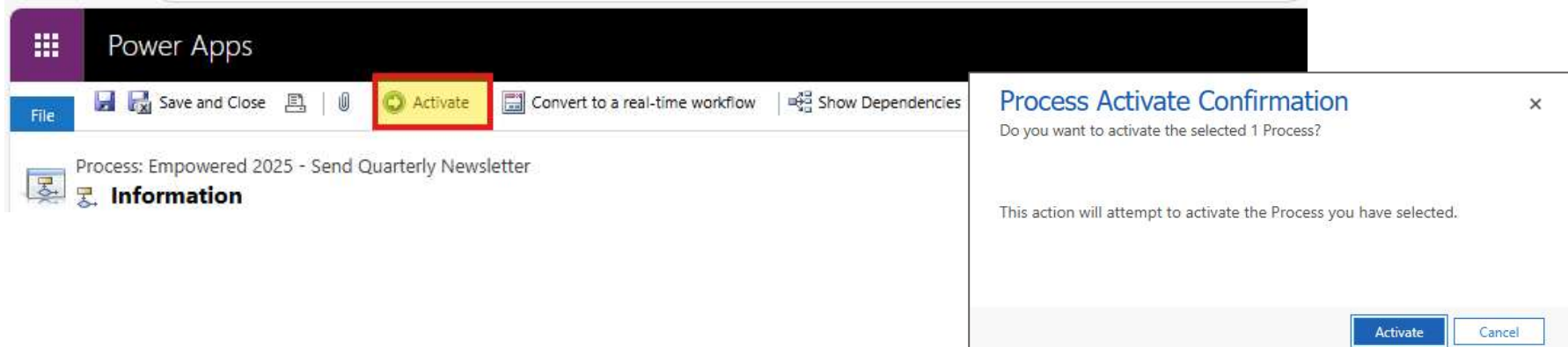
Email Templates: **All Language Email Templates**

<input type="checkbox"/>	Title ↑	Template Type	Descriptor ▼
<input type="checkbox"/>	Deprecated - GOnote Donation Confirmation ...	Global	
<input checked="" type="checkbox"/>	Empowered 2025 - Newsletter Email Template	Global	
<input type="checkbox"/>	GOapply - Approval/Denial Email Response to R...	Global	This email is sent to
<input type="checkbox"/>	GOapply - Foundation Applicant Approval Email	Global	This email is sent to
<input type="checkbox"/>	GOapply - GOapply - Verify Individual Account	Global	This email is sent to
<input type="checkbox"/>	GOapply - GOapply Contact Applicant Approval	Global	This email is sent to
<input type="checkbox"/>	GOapply - Individual Applicant Reminder Email	Global	This email is sent to
<input type="checkbox"/>	GOapply - Invite Constituent to Apply	Global	This email is sent to
<input type="checkbox"/>	GOapply - Invite Contact to Apply	Global	
<input type="checkbox"/>	GOapply - Invite New User	Global	This email is sent to

1 - 39 of 39 (1 selected)

EXAMPLE 1: SEND USING A CRM TEMPLATE

- Activate the New Process
 - In the toolbar, click Activate



EXAMPLE 1: SEND USING A CRM TEMPLATE

- If you set up an automatic workflow, it will send when records meet the conditions of the workflow.
- If you set up an on-demand workflow, you will see the workflow in the Flow dropdown in the Toolbar of the table the workflow is built on.

EXAMPLE 2: SEND USING A WORKFLOW BODY

- Create a New Process
 - Create a "Check Condition" that fits your ideal scenario.
 - When sending an email using a workflow, select "Send Email" as the step.
 - Select "Create New Message" to draft the email body inside the workflow.

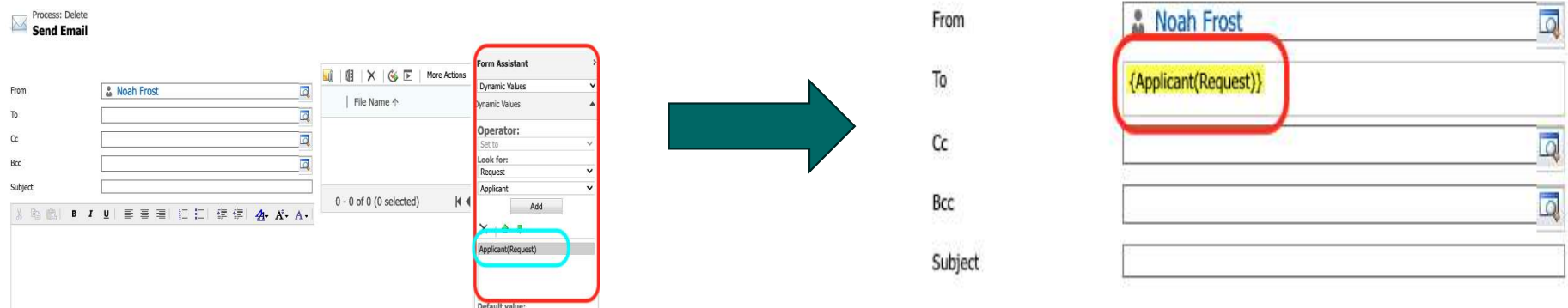
Best Practice

Utilize the white text area to describe the action that is being performed.

The screenshot displays a workflow configuration interface. At the top, there are three buttons: 'Add Step' (with a plus icon), 'Insert' (with a double arrow icon), and 'Delete this step.' (with an X icon). Below these buttons, a step is expanded to show a condition: 'Check if Status Reason is Denied by Program Officer'. Underneath the condition, there is a text area containing 'If Concept:Status Reason equals [Denied by Program Officer], then:'. A radio button is selected next to the text 'send denial email'. At the bottom of the step configuration, there are two dropdown menus: 'Send email:' with 'Use Template' selected, and another dropdown with 'Concept' selected. To the right of these dropdowns is a 'Set Properties' button.

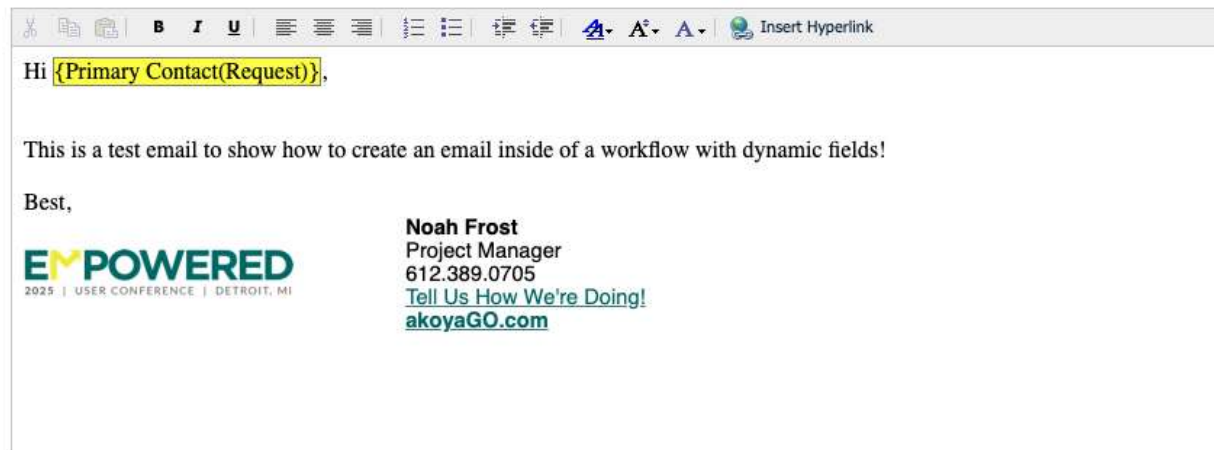
EXAMPLE 2: SEND USING A WORKFLOW BODY

- Click “Set Properties” to define which User should send this email and who the recipients should be.
 - “From” should be a licensed CRM user with “send as” permissions enabled.
 - “To”, “Cc”, “Bcc”, “Subject” can be dynamic fields pulled from your desired record.



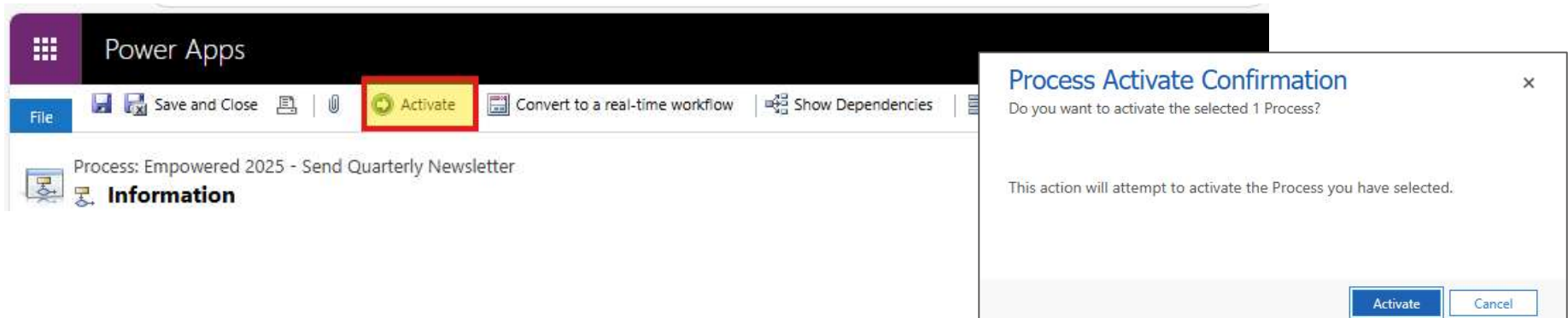
EXAMPLE 2: SEND USING A WORKFLOW BODY

- Click in the body of the email to draft your email with dynamic fields.
 - Inputting a dynamic field in an email is the same process as including a dynamic field in the address blocks.



EXAMPLE 2: SEND USING A WORKFLOW BODY

- Activate the New Process
 - In the toolbar, click Activate



SCENARIO 2

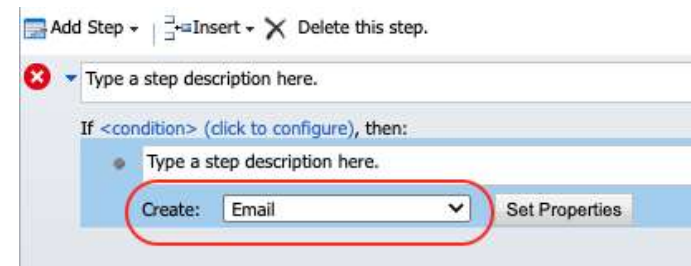
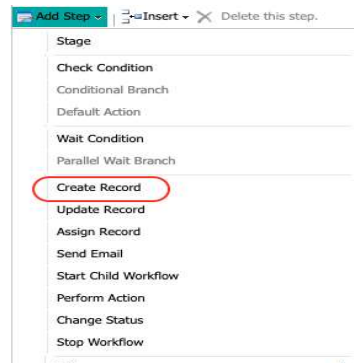
Drafting an Email using a
CRM Workflow

DRAFTING AN EMAIL USING A WORKFLOW BODY

- Create a New Process
 - Create a "Check Condition" that fits your ideal scenario.
 - When drafting an email using a workflow, select "Create Record" as the step.
 - Select "Email" to create the draft email.

Best Practice

Utilize the white text area to describe the action that is being performed.



DRAFTING AN EMAIL USING A WORKFLOW BODY

- The preceding steps remain the same as creating a workflow to send an email.

Best Practice

When creating the body of the email, be aware of dynamic fields and the grammar implications they may have on preceding words.

THANK YOU

Presented by

Noah Hayden
Project Manager

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Project Manager