

EMPOWERED

2025 | USER CONFERENCE | DETROIT, MI

DATA ENTRY BEST PRACTICES: WORK SMARTER, NOT HARDER

PRESENTED BY

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akoyago

LEARNING OBJECTIVES

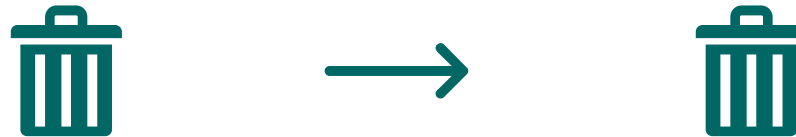
1. Learn key data entry techniques to improve efficiency and accuracy
2. Explore time-saving tools and shortcuts within your CRM
3. Understand how to maintain data consistency and avoid common errors
4. Develop habits to keep your database clean and organized for long-term success

WHY?

"Garbage in, garbage out."

It's a classic saying in the tech world that means:

If you put bad data into a system, you'll get bad results out—no matter how smart the system is. Clean, accurate data is the foundation for everything that follows.



Think about your outcome. Enter data for a clean output, when you go to pull reports, mailing lists, and charts...You can avoid cleaning up poor data entry.

SEARCHING

Before you add any new data, always perform a search.

Dataverse Search	Quick Find (NA if Smart Search is enabled)	Smart Search (new option, must be enabled by org)
<ul style="list-style-type: none">• Top of screen• Broad search• Fast, full-text search across multiple tables and fields• Multiple categories• (Supports 1:N, N:1, N:N relationships)• Includes nicknames and close results	<ul style="list-style-type: none">• Found within a table• Narrow search• Table-specific• Only fields included in the Quick Find View are searchable	<ul style="list-style-type: none">• Adds intelligence to your Dataverse Search• Interpret results based on recent searches• Fast search across multiple tables and fields• Includes nicknames, close results, and clues

DATAVERSE SEARCH

Why Dataverse?

- Multiple types of records
- Less sensitive search function
- Let's see an example!

Best Practice

To avoid duplicate entry, always begin with the **Dataverse search** in akoyaGO, before creating new records!

DATAVERSE SEARCH: EXAMPLE

akoyaGO akoyaGO with Accounting SANDBOX

← Search results

Top results **Constituents (19)** **Payments and Requirements (17)** **Requests (20)** **GOApply Status Tracking (4)** **Contacts (230)** **Donors & Prospects (3)** **Gifts (3)** **Gift Payments (3)**

Showing 20 of 299 results for cat depot from 29 tables in akoyaGO with Accounting.

Constituents

Constituent Name	Primary Contact	Address 1: City	Main Phone	Website	Tax ID
Cat Depot	Susan Hanus	Sarasota		https://catdepot.org/	20-0217681

[Show more](#)

Payments and Requirements

Payment/Requirement #	Request Applicant	Posting Date	Amount	Payment Status	Payee
0050234	Cat Depot	9/11/2024	\$1,500.00		Chasing Daylight Animal Shelter
0050213	Cat Depot	9/10/2024	\$300.00		Chasing Daylight Animal Shelter
0050521	Cat Depot				
0050523	Cat Depot	3/12/2025	\$300.00	Received	Chasing Daylight Animal Shelter
0050361	Cat Depot	9/17/2024	\$20.00		Chasing Daylight Animal Shelter
0050372	Cat Depot	10/1/2024	\$5,000.00	Reversed	Chasing Daylight Animal Shelter

QUICK FIND

When to use Quick Find Search?

- Searching inside just **one** table
- More specific
- Fewer results to sort through
- Let's see an example!

Best Practice

When using Quick Find, place an asterisk (*) before your search term to broaden the results.

QUICK FIND: EXAMPLE

Active Donors & Prospects

Edit columns Edit filters Quick find

Formal Default	Primary Contact	Donor Constituent	Donor Type	Total Com...	First Gift ...	Most Rece...	Donor #	Created On
<input type="checkbox"/> Meghan Davignon	Meghan Davignon		Individual/Household	\$1,138,940.84	1/1/2019	5/19/2025		1/25/2019 2:29 ...
<input type="checkbox"/> Meghan Test Delete	Meghan Davignon	Meghan Davignon 000025	Individual/Household	\$5,810.69	1/4/2023	5/10/2025	000045	1/4/2023 10:42 ...
<input type="checkbox"/> Mr. and Mrs. Bratten	Shanlee Bratten		Individual/Household	\$500.00	8/22/2023	8/22/2023	000080	8/30/2023 8:24 ...

Search Results

Focused view Show Chart New Delete Refresh Visualize this view Email a Link Flow Run Report Excel Templates Export to Excel Share

Edit columns Edit filters Bratten*

Formal Default	Donor Constituent	Primary Contact	Donor T...	Secondary Contact	Email Address	First Gif...	M
<input type="checkbox"/> Mr. Theman		Stan Theman	Individual/...	Bratten Shanlee	shanbratten+3@g...	8/22/2023	8/

Apply begins with filter on these columns:
Donor #
Donor Constituent
Email Address
Formal Default
Primary Contact
Secondary Contact

SMART SEARCH

What are the benefits of Smart Search?

Note: This is a 2025 feature of Dynamics 365 that must be enabled for your organization by your System Admin.

- Searching inside all tables
- Uses natural language and phrases to help search
 - Ex. Donors in MI
- Uses context-aware suggestions
 - Ex. Considers recent records and synonyms
- Offers a faster search result with optimized performance
- Offers a visualization component

SMART SEARCH: EXAMPLE

Active MI donors

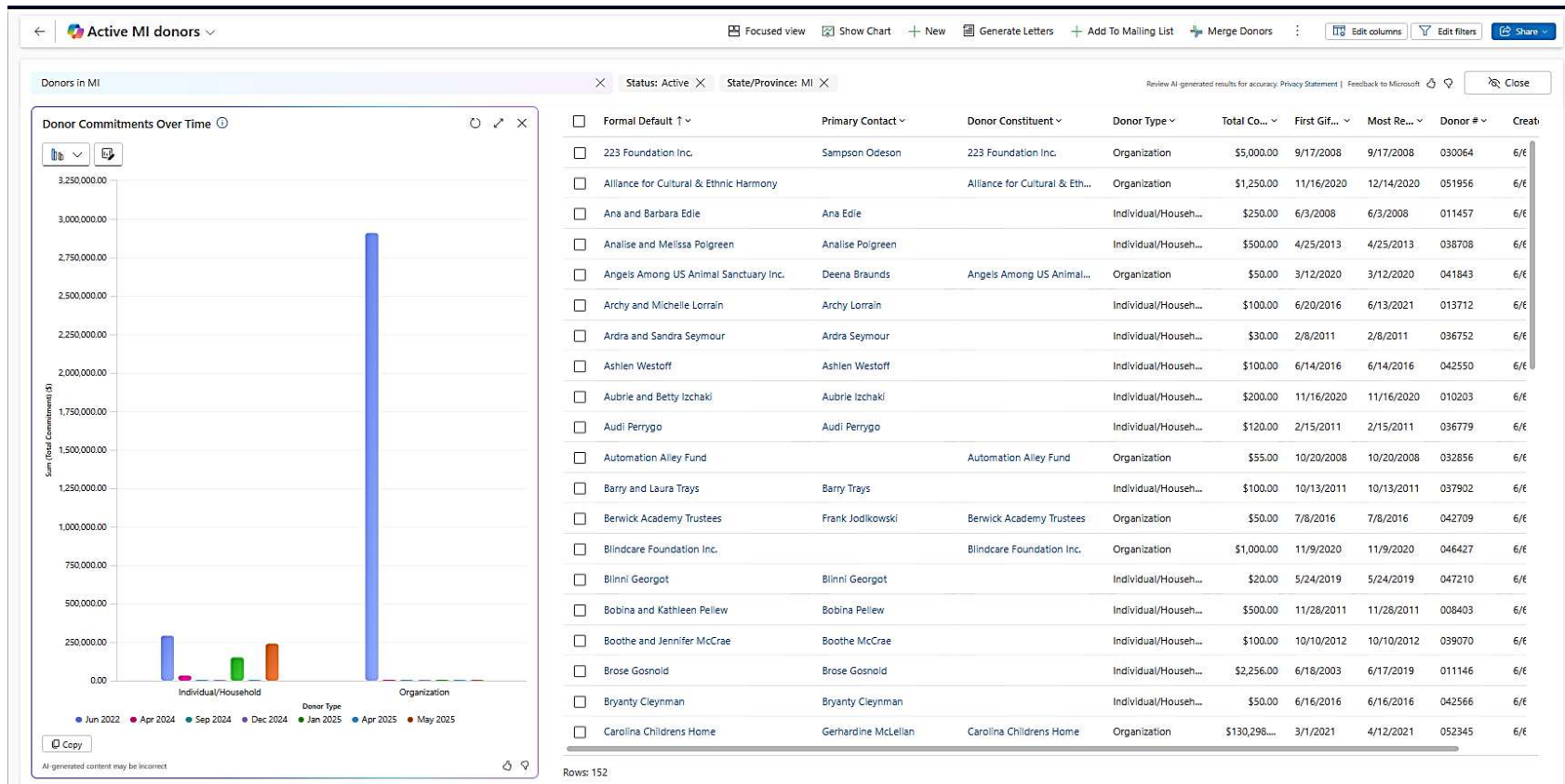
Focused view Show Chart + New Generate Letters + Add To Mailing List Merge Donors Edit columns Edit filters Share

Donors in MI Status: Active State/Province: MI

Review AI generated results for accuracy. Privacy Statement Feedback to Microsoft Visualize

<input type="checkbox"/> Formal Default ↑	Primary Contact	Donor Constituent	Donor Type	Total Commitm...	First Gift Date	Most Recent Gi...	Donor #	Created On
<input type="checkbox"/> 223 Foundation Inc.	Sampson Odeson	223 Foundation Inc.	Organization	\$5,000.00	9/17/2008	9/17/2008	030064	6/6/2022 5:49 PM
<input type="checkbox"/> Alliance for Cultural & Ethnic Harmony		Alliance for Cultural & Ethnic Harmony	Organization	\$1,250.00	11/16/2020	12/14/2020	051956	6/6/2022 5:53 PM
<input type="checkbox"/> Ana and Barbara Edie	Ana Edie		Individual/Household	\$250.00	6/3/2008	6/3/2008	011457	6/6/2022 5:47 PM
<input type="checkbox"/> Analise and Melissa Polgreen	Analise Polgreen		Individual/Household	\$500.00	4/25/2013	4/25/2013	038708	6/6/2022 5:51 PM
<input type="checkbox"/> Angels Among US Animal Sanctuary Inc.	Deena Braunds	Angels Among US Animal Sanctuary Inc.	Organization	\$50.00	3/12/2020	3/12/2020	041843	6/6/2022 5:51 PM
<input type="checkbox"/> Archy and Michelle Lorrain	Archy Lorrain		Individual/Household	\$100.00	6/20/2016	6/13/2021	013712	6/6/2022 5:55 PM
<input type="checkbox"/> Ardra and Sandra Seymour	Ardra Seymour		Individual/Household	\$30.00	2/8/2011	2/8/2011	036752	6/6/2022 5:51 PM
<input type="checkbox"/> Ashlen Westoff	Ashlen Westoff		Individual/Household	\$100.00	6/14/2016	6/14/2016	042550	6/6/2022 5:52 PM
<input type="checkbox"/> Aubrie and Betty Izchaki	Aubrie Izchaki		Individual/Household	\$200.00	11/16/2020	11/16/2020	010203	6/6/2022 5:54 PM
<input type="checkbox"/> Audi Perrygo	Audi Perrygo		Individual/Household	\$120.00	2/15/2011	2/15/2011	036779	6/6/2022 5:50 PM
<input type="checkbox"/> Automation Alley Fund		Automation Alley Fund	Organization	\$55.00	10/20/2008	10/20/2008	032856	6/6/2022 5:50 PM
<input type="checkbox"/> Barry and Laura Trays	Barry Trays		Individual/Household	\$100.00	10/13/2011	10/13/2011	037902	6/6/2022 5:58 PM

SMART SEARCH VISUAL: EXAMPLE



DATA ENTRY: CONTACT

- Contacts table: +New or Quick Create
- Required vs. Recommended fields
- Parent Constituent
 - Where a contact is best identified by your foundation
- Fill out as much information as you can.
- Try to fill in "Business Recommended" fields, even if not required!

First Name

Last Name

The screenshot displays the AkoyaGO software interface for a constituent record. The main window shows the 'Organization Details' tab for '1 life church inc'. The interface includes several sections: 'ORGANIZATION INFORMATION' with fields for 'Founded', 'Service Area', and 'No. of Employees'; 'PAYMENT INFORMATION' with dropdowns for 'Payment Method', 'Vendor', and 'Customer'; and a 'CONTACTS (Parent Constituent)' subgrid. The subgrid has columns for 'Full Name', 'Parent Constituent', 'Job Title', 'Email Address', and 'Business P'. A '+ New Contact' button is visible in the top right of the subgrid. The browser address bar shows 'AkoyaGO with Accounting' and 'SANDBOX'.

Best Practice

When creating a contact that's related to a constituent, start on the constituent record and click on the "+ New" on the contact subgrid to "Quick Create" a contact, which will prefill some data for you.

DATA ENTRY: CONTACT

Reminders

- Parent Constituent should be filled on a Contact Record to represent their Primary Employer
- Capture an individual's engagement with your organization/community through various relationships connected to the Contact Record
 - Connections: Family/Friend (Contact <> Contact), Fund (Fund<>Contact), Business (Constituent<>Contact)
 - Committees: Contact records can be added to Committees to capture groups of people
 - Events: Event Attendee Records use Contact to connect individuals to events in akoyaGO
 - Donor Summary: Donor Records must be connected to a Contact to display donor engagement
 - All constituents require a Primary Contact

Best Practice

Each individual should only have one contact record in akoyaGO!

DATA ENTRY: CONSTITUENT

- Constituent table: +New
- Required fields: Constituent Name and Primary Contact
- Primary Contact on the constituent should be your organization's main contact person for that constituent.

The screenshot shows a web interface for entering constituent information. At the top, it says 'Cat Depot - Unsaved' and 'Constituent - Constituent'. Below this is a navigation menu with tabs: Summary (selected), Organization Details, GOverify, Requests, Interests, Impact Investments, Internal Information, and Related. The main form is divided into two columns. The left column is titled 'CONSTITUENT INFORMATION' and contains fields for: Constituent Name (Cat Depot), Program, AKA, Phone, Department, Fax, Institution Type (non-profit organization), Website (https://catdepot.org/), and Parent Constituent. The right column contains fields for: General Email, Default Payee, Primary Contact* (Susan Hanus), GOapply Contact, Primary Contact Salutation (Susan), Primary Contact Title (Executive Director), and Sort By (Cat Depot).

DATA ENTRY: CONSTITUENT

- Relationship between Contact and Constituent
 - A constituent has **one** primary contact.
 - Multiple contacts can share the same parent constituent.
- Parent Constituent
 - Parent Constituent for Contacts should be their primary employer.
 - Parent constituent for Constituents should be the "highest tier" of that organization.
 - *Ex. The Boys and Girls Club of Tucson is a parent constituent of the Boys and Girls Club of America*
- Default Payee
 - If this organization should be paid through a sponsor/fiscal agent, the Default Payee should be filled in on the Constituent record. If the constituent should be paid directly, leave the Default Payee blank.

DATA ENTRY: CONSTITUENT

- GOverify
 - Once the Constituent's Tax ID is filled in, GOverify will automatically run upon save.
 - Data pulls from Pub. 78 (USA) / CRA (Canada).
 - GOverify Exception field will display discrepancies with your data.
 - Ex. Legal Names and Addresses

Best Practice

Always fill in Tax ID for constituents requesting funding.

GOverify RUN CYCLES

- Automatically Runs:
 - Constituent: On creation or update of Tax ID field
 - Request: On creation of request record (unless run within the last 5 days)
 - Payment: For payments due within 30 days (based on est. Grant Pay Date)
- Manually:
 - On the Constituent record with the GOverify button in the action ribbon

Best Practice

GOverify automations help foundation staff complete due diligence before processing payment to any constituents.

LET'S PRACTICE!

Contact

- **Name:** Stevie Nicks
- **Email address:** stevie@fleetwood.com
- **Job:** Singer

Constituent

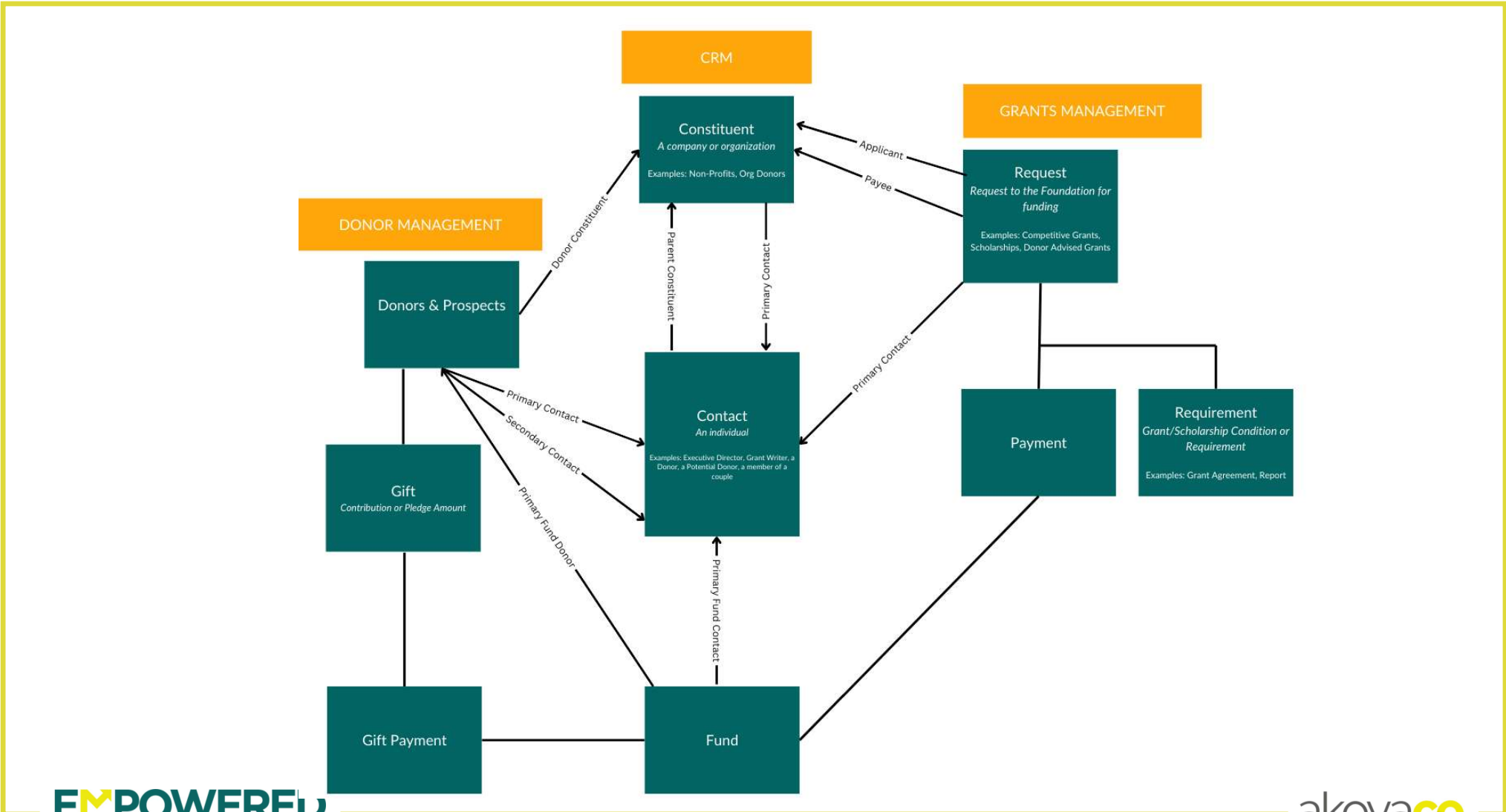
- **Name:** Clearwater Marine Aquarium
- **Primary Contact:** Dr. James “Buddy” Powell
- **Job:** Chief Zoological Officer
- **Default Payee:**
- **Tax ID:** 59-2086737

UNDERSTANDING RELATIONSHIP HIERARCHY

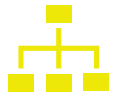
- Think of akoyaGO as a house for your data
 - Contacts and Constituents are the base foundation
 - Added layers are built on top
 - Examples: Donors & Prospects, Requests, Funds
- Important to maintain clean data

Best Practice

Establish data cleanup practices so that your "foundation" is strong!



DATA ENTRY BEST PRACTICES



Maintain Data Consistency

Use **standard naming conventions** (e.g., "ABC Corp" vs. "ABC Corporation").

Leverage **option sets** or **drop-downs** to avoid free-text inconsistencies.

Use **business rules** to enforce field formats and logic.



Leverage Auto-Population and Defaults

Configure **default values** for fields where applicable.

Use **business rules** or **workflows** to auto-fill related fields.



Duplicate Detection

Determine a duplicate detection best practice policy

Utilize policy to maintain clean records throughout the year



Audit and Track Changes

Enable **auditing** to track who changed what and when.

EXAMPLES OF DATA CONSISTENCY BEST PRACTICES

FIELD TYPE	PRACTICE	DO	DON'T
Text fields	Avoid abbreviations	Street	St.
Phone Number	Choose a format	(999) 999-9999	9999999999
Date Fields			
Option sets	Encourage option sets over free text fields	Project area: <ul style="list-style-type: none">- City/County- Multiple Counties- Statewide	Free Text
	Utilize labeling		

EXAMPLES OF AUTO-POPULATION BEST PRACTICES

Creating New Columns/Fields with Automation

- Set a default value. Ex. Site Visit Required (Yes/No) Defaults to Yes

Business Rules for Auto-populating

- Lock a field once it contains data to prohibit accidental edits
- Tip! Set the Scope to the entity to avoid duplicative rules
- Document logic clearly for future maintenance

Starting from the Parent Record

- akoyaGO functionality will prefill fields when starting from a parent record, utilizing quick create forms

EXAMPLES OF DUPLICATE DETECTION BEST PRACTICES

Active Duplicate Detection Rules

- Same Email Address
- Same Phone Number
- Same Website

Establish Internal Policy for Frequency

- Quarterly data analysis
- Utilize Dashboards to monitor data integrity

Create Notifications for Record Creation

- Dashboard of new constituents created by GOfund / GOapply user

EXAMPLES OF AUDIT BEST PRACTICES

Ensure auditing is enabled on all necessary tables

- Ex. If you create a new table, determine if audit history is beneficial for these records

During your data analysis, confirm that your auditing is enabled quarterly

- Remember, if Auditing is already turned on for a table, do not turn it off

Utilize these tools to trust but verify with an audit trail!

THANK YOU

Presented by

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