

# EMPOWERED

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## BEST PRACTICES OF CONFIGURING YOUR SYSTEM (DO'S & DON'TS)

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# OVERVIEW

- Configuration Standards and Recommendations
- Risks of Customizations
- Best Practices for Configurations
- Examples and Tips

# CONFIGURATION 101

- akoyaGO Support offers technical assistance for out-of-the-box functionality, such as:
  - Letter Templates
  - Email Templates
  - Connections
  - Standard forms and fields
- akoyaGO Development updates the system features and functionality approximately every six weeks
  - Product Suggestions are vetted by Development to deploy enhancements to all users and become supportable functionality
- Environment-specific configurations can be made by foundation staff users with System Customizer permissions. However, configurations are limited to your environment and are not included with akoyaGO Support.

# CONFIGURATION BEST PRACTICES

- Configurations should be built in your Custom Solution in PowerApps
  - Why? To separate akoyaGO functionality from your custom configurations
  - How? <https://gosupport.akoyago.com/knowledgebase/article/KA-01508/en-us>
- Establish an internal akoyaGO Customizer Committee
  - Ensure configurations are being discussed and agreed upon across departments
- Keep a log of configurations made by your staff
  - Logging configurations help with long-term sustainability and continuity across departments
- Before configuring on your own, check with your Account Manager for upcoming feature releases
  - Avoid making custom configurations if supported system functionality is coming soon

# TABLES & FORMS

DO'S	DON'TS	TIPS
<ul style="list-style-type: none"><li>• Do customize entity relationships to add field mapping, if appropriate.</li><li>• Think critically before removing field requirements. Requirements are usually in place to support our programming, and removing requirements may result in errors/programming failures.</li><li>• Do add custom fields to capture unique data.</li><li>• Always include descriptions (tool tips) on custom fields that indicate how the field is used (e.g., where it is referenced).</li></ul>	<ul style="list-style-type: none"><li>• Do not rename standard tables.<ul style="list-style-type: none"><li>– Doing so makes it difficult for users to reference standard documentation.</li></ul></li><li>• Do not rename standard fields; create new fields instead.<ul style="list-style-type: none"><li>– The alternative is to augment the label on the form but preserve the original name as well.</li></ul></li><li>• Do not use rollup fields for data that is time-sensitive. Rollup fields only update periodically and, therefore, are not always accurate.<ul style="list-style-type: none"><li>– Alternative - Use Power Fx fields instead.</li></ul></li><li>• Do not remove tabs from the form. If necessary, hide them instead.</li><li>• Do not remove key fields from forms. If necessary, hide them instead.<ul style="list-style-type: none"><li>– Key fields should be locked on the form, and therefore not removable.</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Search for existing fields (columns) in the table before creating new ones.</li><li>• Show hidden fields on forms before adding new ones.</li><li>• You can have one field populate in multiple places on a form within the same table.</li><li>• Keep field labels and field names the same for easier searchability.</li></ul>

# BUSINESS RULES

DO'S	DON'TS	TIPS
<ul style="list-style-type: none"><li>• Do add custom Business Rules where appropriate. Example use cases:<ul style="list-style-type: none"><li>– Setting default values on specific fields</li><li>– Setting field values based on other fields</li><li>– Conditionally requiring fields</li><li>– Conditionally showing/hiding fields</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Do not modify standard Business Rules. Doing so is a non-supported customization.</li><li>• Do not base Business Rules on rollup field values. These will not trigger unless a user opens the record, regardless of the scope.</li><li>• Do not use Business Rules to overwrite system requirements as this could interfere with system processes.</li></ul>	<ul style="list-style-type: none"><li>• Base Business Rules on option set fields or fields containing/not containing data to avoid a business rule from not triggering</li></ul>

# BUSINESS PROCESS FLOWS

DO'S	DON'TS	TIPS
<ul style="list-style-type: none"><li>• Use only as a data entry guide</li></ul>	<ul style="list-style-type: none"><li>• BPFs do not enforce/control the order of data entry</li></ul>	<ul style="list-style-type: none"><li>• BPFs are merely a suggestive guide of what to do next, these steps can be bypassed</li></ul>

# SYSTEM VIEWS AND DASHBOARDS

DO'S	DON'TS	TIPS
<ul style="list-style-type: none"><li>• Use the primary field as the first column in the view. This makes opening the correct record easier for the end-user.</li><li>• Encourage personal views for users and only make system views that will be used by multiple users.<ul style="list-style-type: none"><li>– This helps from clogging the list of system views.</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Do not rename standard system views.<ul style="list-style-type: none"><li>– Instead, save of a copy of the standard system view and edit the copy.</li></ul></li><li>• Do not modify standard system dashboards; create a copy instead.</li></ul>	<ul style="list-style-type: none"><li>• Before turning off any System Views, review dependencies and description to determine where the view is used. Views used in portals (GOfund, GODO donate, GOapply) should not be turned off.</li><li>• Editable grids:<ul style="list-style-type: none"><li>– Use editable grid views sparingly. In-line editing makes typos/errors more likely.</li><li>– Include the minimum number of columns possible to prevent accidental data changes.</li></ul></li></ul>

# LETTER AND EMAIL TEMPLATES

DO'S	DON'TS	TIPS
<ul style="list-style-type: none"><li>• Letter Templates are our best practice for merging documents. If a letter template cannot achieve something, it is not supported (Flows are not offered as alternatives).</li><li>• Clearly label all email templates and include a Description value which indicates where the template is used (e.g., in an automated workflow). Be specific.</li></ul>	<ul style="list-style-type: none"><li>• Do not rename/delete standard email templates.</li><li>• Do not modify URL fields contained in standard email templates.</li></ul>	<ul style="list-style-type: none"><li>• When creating a letter template, create the system view first to know what merge fields to include</li><li>• Letter templates can pull from multiple tables while email templates can only reference a single table</li></ul>

# PROCESS WORKFLOWS

DO'S	DON'TS	TIPS
<ul style="list-style-type: none"><li>• Always include a check condition, even if the use case seems obvious.</li><li>• Ensure all logical branches are accounted for (E.g., if this, do A, otherwise, do B – don't neglect B).</li><li>• Ensure that completed system jobs are set to be automatically deleted to preserve database capacity (background workflows only).</li><li>• Do use Email Templates wherever possible to facilitate updates by the end user.</li></ul>	<ul style="list-style-type: none"><li>• Do not modify standard workflow steps. If possible, create additional workflows to augment the functionality of standard workflows.<ul style="list-style-type: none"><li>– Do not hardcode the sender if possible. This is difficult to manage as staff changes. The preferred method would be to pull a dynamic value from the trigger record, such as Owner or Modified By user.</li></ul></li></ul>	<ul style="list-style-type: none"><li>• For custom workflows, include your organization name or acronym in the workflow name.</li></ul>

# SECURITY

DO'S	DON'TS	TIPS
<ul style="list-style-type: none"><li>• If custom security roles are used, document them thoroughly and store them in client customizations.</li><li>• All akoyaGO/integration users should be added to the System Administrator security profile to avoid errors/failures.</li><li>• If using column-level security, document the profiles thoroughly (e.g., what permissions are included in each profile and who should be assigned).</li></ul> <p><b>Business Central Permission Sets</b></p> <ul style="list-style-type: none"><li>• Create custom permission sets which are based on standard permission sets (e.g., akoyaGO User) and selectively remove permissions as needed. This will ensure custom permission sets receive updates as they are released.</li><li>• If using custom permission sets, document them thoroughly.</li></ul>	<ul style="list-style-type: none"><li>• Avoid using custom security roles if at all possible. Custom security roles will need modifications anytime standard security roles are modified, and will likely encounter errors after product updates.</li></ul>	<ul style="list-style-type: none"><li>• When creating custom column security roles make sure to create groups for users that can edit and view</li><li>• Use Microsoft team user profiles to avoid having to go into each security group to edit users</li></ul>

# POWER AUTOMATE

DO'S	DON'TS	TIPS
<ul style="list-style-type: none"><li>• Use on-demand flows only when a workflow or business rule cannot meet the requirements of your organization.</li><li>• A current foundation staff user should be the owner of the flow so that they receive notices of failures.</li></ul>	<ul style="list-style-type: none"><li>• Do not build fully automated flows. Use process workflows/business rules instead.</li></ul>	<ul style="list-style-type: none"><li>• Use Process workflows inside of PowerApps whenever possible</li></ul>

**THANK YOU**

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