

# October 2024 Product Update

# Agenda

Housekeeping

Known Issues

akoyaGO (non-accounting) – Bug Fixes & Enhancements

GOapply – Bug Fixes & Enhancements

akoyaGO with Accounting – Bug Fixes & Enhancements

Business Central – Bug Fixes & Enhancements

GOfund – N/A

GObonate – Enhancements

# Where Can I Find Release-Related Resources?

<https://gosupport.powerappsportals.com>

- Release Notes
- Updated Documentation
- Recording of this Session



# Housekeeping

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## Keep an eye on “Announcements”

Utilize GOSupport announcements to keep up to date on these items between product updates



## Microsoft Email Re: “extension isn’t compatible”

**Subject: Modify your extension so it’s compatible with the version 25.0.23364.24052**

If the extension in reference is “akoyaGO” – you do not need to worry about this – akoyaGO has it covered!



## Modify your extension so it’s compatible with the version 25.0.23364.24052

We’re making changes in the next release (version 25.0.23364.24052) of Dynamics 365 Business Central. These changes will render the akoyaGO Integration extension that’s installed in your Production (Production) environment incompatible.

This incompatibility must be resolved before your environment can be updated to version 25.0.23364.24052. You can find the compatibility error details and mitigation steps [here](#).

Extension name: akoyaGO Integration

Extension version: 24.1.24200.2

Extension publisher: akoyaGO, Inc.

akoyaGO

- We are aware that users are sporadically receiving the error "Something has gone wrong. Check technical details for more details." when attempting to open records from a related record and/or a view. If you receive an error like this or an error indicating that the action "Cannot read properties of undefined (reading 'Cells')", our recommendation is to clear your cache in your browser. This should resolve the issue.

Users Receiving  
Generic Error when  
Trying to Open Record



- If you encounter this error, please ask another member of your organization to submit a GOsupport case on your behalf with a screenshot of the error and the email of the user whom experienced it. If no other team members are able to submit a case, please email your Account Manager.

GOsupport  
Registration / Sign In  
Errors



# akoyaGO Bug Fixes

We have fixed a bug in which Letter Template Session names that included apostrophes were creating duplicate folders in SharePoint.

We have fixed a bug in which akoyaGO was not properly capturing the City when using Canadian postal codes.

GOverify: We have fixed a bug in which Date Exemption Checked was not updating in cases where the organization's tax status was Revoked.

We have fixed a bug in which users were not able to set their Default font and font size in Email activities.

# akoyaGO Enhancements

We have removed logic that auto-filled the Address on a Contact when it was being created from within the Constituent record, meaning, when a user clicked +New Contact from the Organization Details tab of a Constituent.

We have added tool tips to all fields on core entities:

- Contact
- Constituent
- Payment or Requirement
- Request

# akoyaGO Enhancements

New Contact forms have been released for each akoyaGO application:



Contact with Accounting



Contact without Accounting

These forms include a **revised layout** for easier navigation and are tailored specifically to their respective app.

Users can **opt in** to view/use the new forms by opening a Contact record and toggling the selected form.

These new forms will be used as the **standard** Contact forms **moving forward**.

The pre-existing Contact form will be **deprecated** in **February 2025**, so any existing client configurations should be copied to the new form.



# GOapply Bug Fixes



We have fixed a bug in which the flows GOapply Add to Review Group (on GOapply Status Tracking) and GOapply Add Request to Review Group (on Request) were failing.



We have fixed a bug in which the Bulk Import Reviewer flow was failing when the Review Group did not contain data. Bulk Import Reviewer no longer requires a Review Group.



We have made a change so that, if you are attempting to impersonate two users at one time (for example, in different browser tabs), you will be logged out of the first impersonation session in favor of the second impersonation session. This is to reduce the likelihood of errors that are caused by multiple impersonation sessions being open at one time.

# GOapply Enhancements

The Review Group Application record now stores the Applicant and/or Primary Contact values from the associated Request record. This allows the system view for reviewers, "GOapply Review", to be sorted by these values.

For **Review Group Application** records created **moving forward** these fields will be auto-populated. **For pre-existing records**, users can populate the new fields using the Flow entitled **"Copy Applicant and Contact from Request"**.

We have removed the GOapply Settings field from the Reviewer Bulk Import form.

# akoyaGO with Accounting – Bug Fixes



We have fixed a bug in which the Send to Accounting button was disappearing from payment views when records were selected.



We have fixed a bug in which Letter Template Session names that included apostrophes were creating duplicate folders in SharePoint.



We have fixed a bug in which akoyaGO was not properly capturing the City when using Canadian postal codes.



GOverify: We have fixed a bug in which Date Exemption Checked was not updating in cases where the organization's tax status was Revoked.



We have fixed a bug in which users were not able to set their Default font and font size in Email activities.

# akoyaGO with Accounting – Enhancements



We have relabeled the "Recurrence" field on the Gift entity to "Auto-Create Next Gift." This is to clarify its intended use and avoid confusion with the new "Recurring Gift" entity added for GOnote



We have added fields for Grant Function and Gift Function in the business process flow of Interfund Grants, in the Grant/Gift Information step.



We have created a system view for Recurring Gifts. Accessed through the GOnote Dashboard or the Recurring Gifts table.



We have created two new Gift Payment Types – Electronic Transfer and Other.



We have added Fund Handling Note as a column on the view Request Payments to Send to Accounting and Gift Payments to send to Accounting



Donor formal email address is now available as a column option for the GOfund Gift Export view.

# Business Central – Bug Fixes



We have updated the Bank Deposit form so that users are only prompted once to choose a General Journal batch, the bank account will be chosen based on the bank account linked to the journal batch.



We have fixed a bug in which the Bank Reconciliation Test Report was displaying cleared transactions in the Outstanding Transactions Detail section.

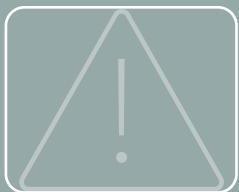
# Business Central – Enhancements



We have updated the language in the case that a user attempts to print checks without having selected Computer Check in Bank Payment Type. The new message reads, **“There are no lines in the filtered view where Bank Payment Type equals Computer Check. Please update these values and retry printing checks.”**



The Bank Account Reconciliation report will now show outstanding transactions as of the statement date, rather than the current date.



Users will now see a warning in the case that they are using the deprecated Fund Statement Layout as their default layout.

# Business Central – Enhancements

Report Layouts



Report ID ↑ ▼	Report Name	Layout Name
50504	akoyaGO Fund Statement	akoyaGO Fund Statement
50504	akoyaGO Fund Statement	akoyaGO Fund Statement (deprecated)

# GO donate Enhancements

We have added a Gift Payments subgrid to GOdonate Transaction records.

We have added a "Register" button next to the "Sign in" button on the Checkout page of GOdonate

## Required Checkout Information

Save time by signing in.

Sign in

Register

If you don't sign in, you won't be able to see your previous online giving history.



## Frequency Options

- Weekly
- Monthly
- Quarterly
- Annually

## Managing Recurring Donations in UI

- Pause/Resume
- Cancel
- Change Fund, Frequency, Next Occurrence Date, Donor (if connected to multiple donor records)







## Email Templates for Communication

- GOdonate – Canceled/Expired Recurring Donation
- GOdonate – Notification of Status Reason Change
- GOdonate – Recurring Donation Confirmation/Reminder

Active Recurring Donations

[View Inactive Recurring Donations](#)

Here is some stuff for the Recurring Donations Disclaimer Text

View	Recurring Gift Number	Donor	Frequency	Next Occurrence	End Date	Total Amount	Status Reason	Actions
	00015	Jacques DuVal	Weekly		10/15/2024	\$21.05	Cancelled	
	00012	Marni DuVal	Monthly		10/14/2024	\$52.64	Modified/Replaced	
	00017	Liam DuVal	Weekly		10/15/2024	\$30.53	Modified/Replaced	
	00013	Marni DuVal	Monthly		10/14/2024	\$52.64	Modified/Replaced	
	00018	Liam DuVal	Weekly	10/29/2024		\$30.53	Active	<div>   x</div>
	00014	Marni DuVal	Weekly	11/14/2024		\$52.64	Active	<div>   x</div>

# Thank you!

Don't forget to clear you cache  
Friday Morning to ensure you  
receive all the updates!

The logo for akoyago, featuring the word "akoyago" in a white, lowercase, sans-serif font. The "GO" portion of the logo is highlighted in a bright yellow color, with the "G" and "O" being bold and slightly overlapping.