
Support Webinar

**Processing
Recommendations
from GOfund**

Agenda

- GOfund Overview
- Set-Up and Admin
- GOfund UI Demo
- Processing GOfund Grant Recommendations in akoyaGO
 - To an organization (Request)
 - To an established fund (Interfund)
 - Recurring (Scheduled Distribution)
- New Features Coming Soon

GOfund Overview

WHAT is GOfund?

- External portal for donors/fundholders
- Integrates with akoyaGO

WHO can access?

- Fundholders/donors
- Designated by foundation

HOW do they access?

- Visit URL unique to your foundation (provided in email)
- Set password/login

WHY is this beneficial?

- Real-time data
- Access fund statements
- Submit Grant Recommendations

Where Can I Find Additional Related Resources?

<https://gosupport.powerappsportals.com>

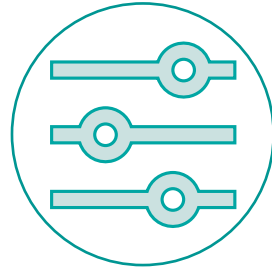
- [GOfund Admin Guide](#)
- [GOfund FAQs](#)
- [GOfund Demo](#)
- Most up-to-date documentation
- Recording of this Session



Set-Up Before Launching GOfund



Review fund
details/information



Set GOfund Settings



Test Test Test!



Communicate with
fundholders



Work with akoyaGO
to prepare a plan for
connections/invites

Fund Connections

-Make connections from the Fund record in akoyaGO

-Role should be Donor Portal Access

-Connecting a **Contact** with an email address

-Permissions set at the connection level

Name	<input type="text" value="Jennifer Tenn"/>	As this role	<input type="text" value="Donor Portal Access (GOfund)"/>
Connected From	<input type="text" value="01483"/>	As this role	<input type="text" value="Fund"/>

Donor Portal Access					
GOfund Email Sent	<input type="text" value="9/17/2024"/>		<input type="text" value="1:33 PM"/>		
Fund Profile Update Access	<input type="text" value="Yes"/>	Grant Submission Access	<input type="text" value="Yes"/>	Fund Statement Access	<input type="text" value="Yes"/>
Grant History Access	<input type="text" value="Yes"/>	Gift History Access	<input type="text" value="Yes"/>	Document Access	<input type="text" value="Yes"/>

GOfund UI Demo



View Funds

Contact has more
than one fund
connection



Tabs at the Top

Permissions on the
Connection



Fund Summary

Spendable Balance
and Fund Balance

Recommend a Grant – What will be created in akoyaGO?

Fundholder chooses to grant to an organization

- Pending Request waiting for approval in akoyaGO
- Use Pending GOfund Requests System View (Requests)

Fundholder chooses to grant to an established Fund

- Interfund waiting to be processed in akoyaGO
- Use GOfund Pending Requests System View (Interfunds)

Fundholder chooses to Issue grant on a standing/recurring basis

- Request to be Approved AND Scheduled Distribution waiting to be processed in akoyaGO
- Will be included in Active Scheduled Distributions System View
- **Feature only available if you have set Enable Recurring to YES in GOfund Settings*

Recommend a Grant to an Organization

Organization Options

Existing Organization in akoyaGO

- List comes from System View (Constituents) - GOfund Grant Recommendation Eligible Constituents

Create new organization

- Will create a new constituent

Charity Search

- If enabled, users can use this search IRS or CRA orgs
- Will create new constituent if one does not exist in your database
- Pulls info from IRS or CRA list for the new constituent

What is created in akoyaGO?

PENDING Request (waiting for action from foundation)



System View – Pending
GOfund Requests

Fields Populated on Request

Summary

Project Tab

Timeline

Process Tab – Recommendation Info

**Recommended
Grant**

Applicant

Purpose

PDF

**Grant
Recommender**

Fund

Anonymous

**Recommended
Payment Date**

Anonymity will be
marked YES on the
Payment when
Request is
Approved

Maps to Estimated
Grant Pay Date on
the Payment when
Request is
Approved

Recommend a Grant to an Established Fund



If fundholder chooses to recommend to an Established Fund instead of an organization, an Interfund will be created



Funds are displayed from GOfund Interfund Funds System View

What is created in akoyaGO?

INTERFUND
record created

waiting to be
processed
(waiting for action
from foundation)

Where do I
look?

System View –
GOfund Pending
Requests
(Interfunds)

Fields Populated on Interfund

Amount

Interfund
Grant Date

Grant
Recommender

Grant Purpose

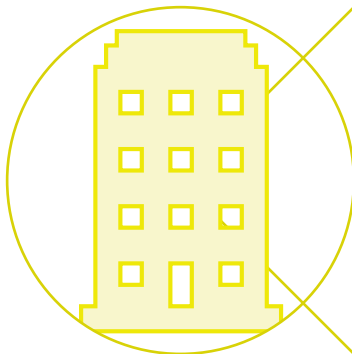
Gift Purpose

This information ends up on the related records (Request, Payment, Gift, Gift Payment) when I process the Interfund

Recommend a Grant on a Recurring Basis

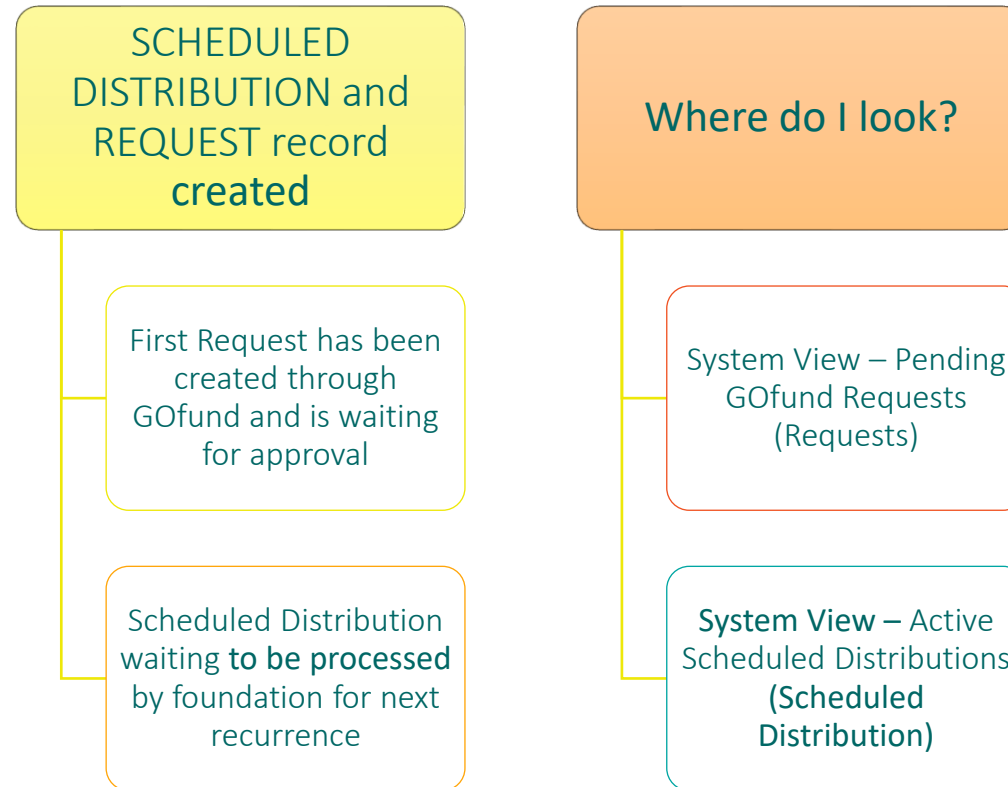


Can choose to enable or disable this feature in GOfund Settings



Feature currently only available for recurring grants to organizations, not recurring interfunds

What is created in akoyaGO?



Fields Populated on Scheduled Distribution

Title

Grant
Recommender

Grantee,
Primary
Contact, Payee

Amount

Start and End
Date

Frequency

Scheduled
Distribution
Source

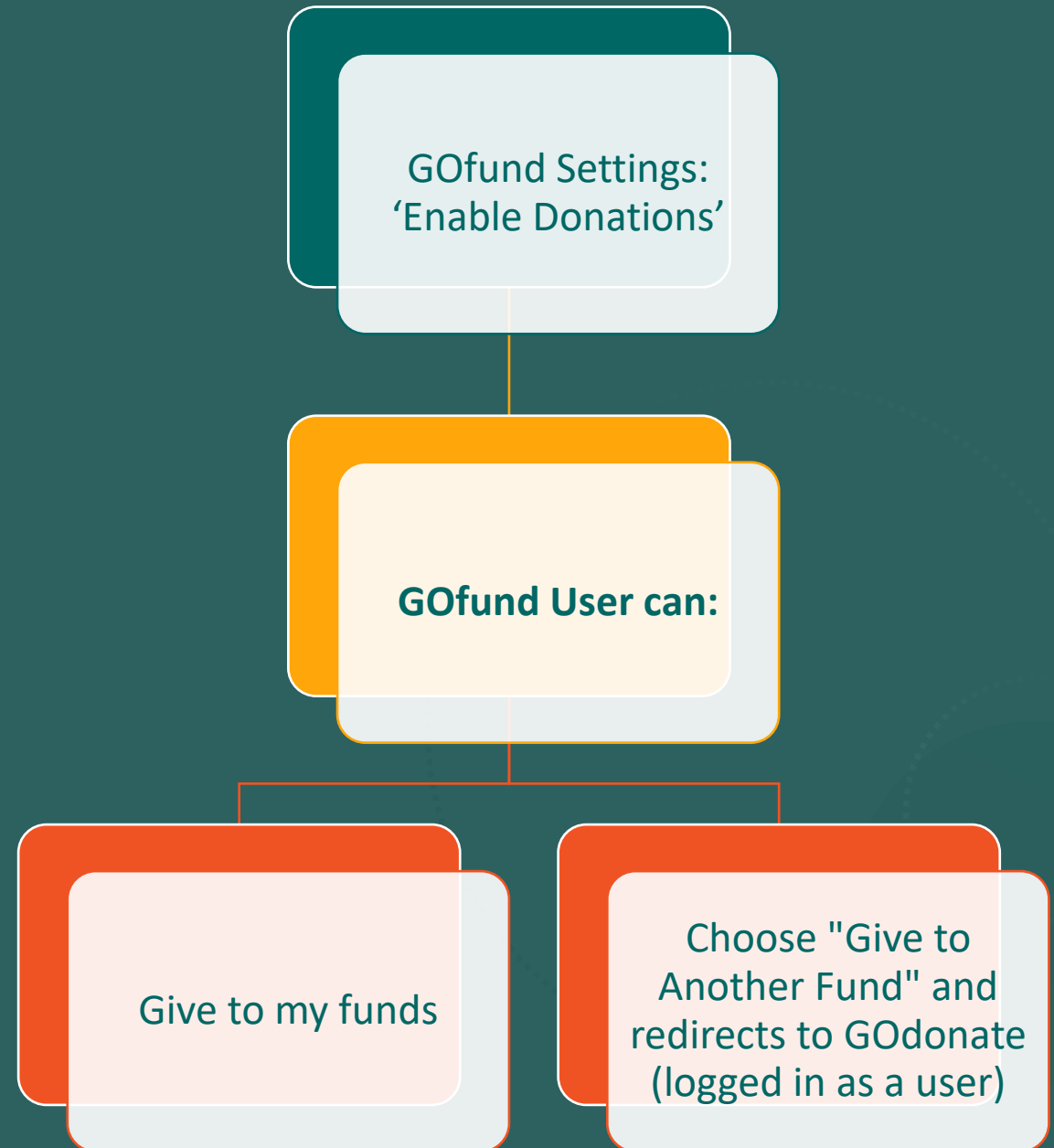
This information ends up on the related Request when I process the Scheduled Distribution

Donate through GOfund

.....
.....
.....
.....

General Settings

Enable Donations ☒ Yes



Donations

The screenshot displays the 'GOfund Settings' interface for a user named '1000 - Unsaved'. The top navigation bar includes links for General, Theme, Home Page, Fund Summary, Fund Statement, Recommend Grant Form, Grant History, Gift History, FAQ Page, Donations, and Related. The 'Donations' link is highlighted with a yellow box, and a green arrow points from it to the 'Give to another fund' link in the secondary navigation bar. The 'Give to another fund' link is also highlighted with a yellow box, and a green arrow points from it to the 'Fund Catalog' section. The 'Fund Catalog' section features a search bar with a dropdown menu for filtering by interest and a search button. Below the search bar, four fund cards are displayed, each with a plant icon and a 'Learn More' button. The funds listed are: Agency Liability Clearing Fund, akoyaGO Internal Operating Endowment, Alyson's Second Fund, and Aquino Fund for Fun.

1000 - Unsaved
GOfund Settings

General Theme Home Page Fund Summary Fund Statement Recommend Grant Form Grant History Gift History FAQ Page Donations Related

General Settings

Enable Donations ☐ No

Home Fund Summary Grant History Gift History Documents FAQ [Give to another fund](#)

GO donate Home Fund Catalog Contact Us Donate Now

Fund Catalog

-- filter by interest -- Search by name Search

Agency Liability Clearing Fund Learn More

akoyaGO Internal Operating Endowment Learn More

Alyson's Second Fund Learn More

Aquino Fund for Fun Learn More

GOfund New Features Coming Soon

Modifications to the GOfund Recommend a Grant Form | 2024

Fully customizable Recommend a Grant Form | 2025

Filter and sorting options for all columns on the grant history tab such as ascending/descending, high/low | 2025

Shopping cart experience for grant recommendations | 2025

GOfund Questions and Next Steps

Any questions?

Interested in
beginning the GOfund
Process or resuming
the process?

Future GOfund
Questions?

Reach out to your AM

Create Support case in
GOSupport

Thank you!

akoyaGO