

June 2025 Product Update

Agenda

Housekeeping

Microsoft Known Issues

akoyaGO (non-accounting) – Bug Fixes & Enhancements

GOapply – Bug Fixes & Enhancements

akoyaGO with Accounting – Bug Fixes & Enhancements

Business Central – Bug Fixes & Enhancements

GOfund – Enhancements & New Features

GOdonate – Bug Fixes & Enhancements

Where Can I Find Release-Related Resources?

<https://gosupport.powerappsportals.com>

- Release Notes
- Updated Documentation
- Recording of this Session





Keep an eye on “Announcements”

Utilize GOSupport announcements to keep up to date on these items between product updates. This is also where you will find information regarding hotfixes

Housekeeping



Microsoft Email Re: “extension isn’t compatible” or “An update to your environment is scheduled for [date]”

Subject: Modify your extension so it’s compatible with the version 26.1

OR

**Subject: We’ve scheduled an update to your environment
Production**

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



Enhancements

Est. Grant Pay Date on Request defaults to **Posting Date** of corresponding Payment

Upon **approval** of a Pending Request, the Est. Grant Pay Date field will now default to the Posting Date of the payment for that request. **Users will still have the ability to manually change this date**

The **Institution Type** column has been **removed** from the main Constituent form.

This field was previously required for the Fundweb portal which has been deprecated. Additionally, the information it contains is often duplicative of the Tax Status field, which is used as a best practice. **Users can continue to use the institution type field if they find it valuable, however it is no longer a best practice.**

We have added four system views on the Email Template table.

akoyaGO Email Templates, GOapply Email Templates, GOfund Email Templates and GOfund Email Templates. The product in each view pertains to the product in which the email template is utilized.

Bank Account and **Routing Number** columns have been **removed** from the Constituent form

This was done because akoyaGO's recommendation is to not store banking info in the CRM.



Enhancements

Users can now add handling notes to Contact, Constituent and Donor records.

A handling note is any pertinent information that you would want other users to see upon opening the record. The handling note will display as a **banner** on the record itself **and** related records such as **Requests, Gifts or payments**.

We have updated Next Payment Date rollup field on request payments to take into account the Est. Pay Date and payments with a status of Received

so that when a new payment is sent to accounting (Payment Status of Received) with a Est. Grant Pay Date in the *future*, that is considered in the Next Payment Due field.

Sanction Status for CRA (GOverify)

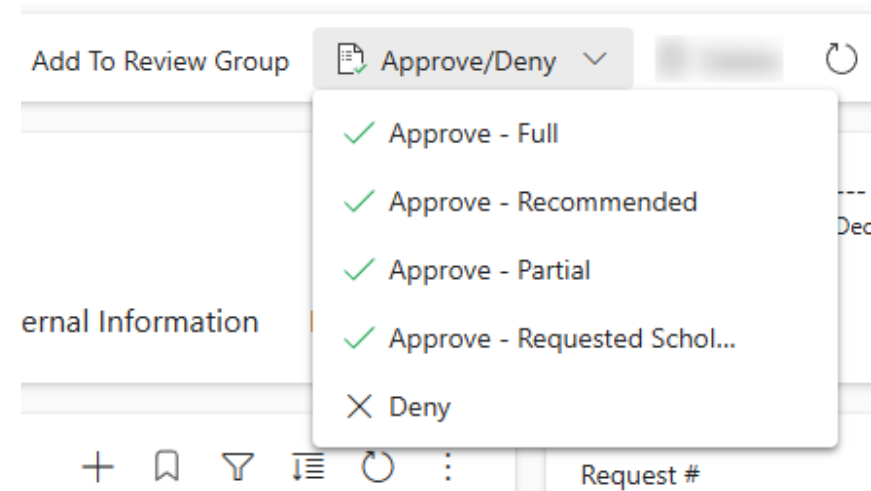
GOverify CRA (Canadian) – When an organization is **Sanctioned**, the Constituent's **tax status** will be **blank** to make clear that further investigation is needed in order to grant to the organization. **A new field has been added to capture sanction status.**

akoyaGO Enhancements

The Approve/Deny Request button has been updated

Entering data (>\$0) will no longer automatically create a payment for the request. It will still mark the request as approved.

- Approve – Full
- Approve – Recommended
- Approve - Partial
- Approve – Requested Scholarship
- Deny



GOapply Enhancements

Due Date in **the In Progress** view in **GOapply** will display the Phase Due Date unless the Override Phase Due Date contains data in the status tracking record, in that case, the override date will show.

Add all Pending Requests to Review Group – A new **button** has been added to **Review Group** called **Add Pending Requests**.

This button searches for GOapply Status Trackings where 'status' = Submitted, the Opportunity and Phase match those assigned to the Review Group, and the Request Status is Pending or In Review then adds Review Group Application records for each Request that matches the criteria.

For Scholarships, a new lookup field has been added to Review Groups for Scholarship. In the case that this field contains data, the tool will look for Requested Scholarship records for the assigned scholarship where the Status Reason is 'Opted-in' in addition to the above criteria.

Reviewers will now be able to see the score that they gave to each application on the Review Group page. This is an opt-in function on the Review Group form. Aggregate score is still a column that can be added to the view.

Individual reviewer scores will only be shown if you enable this function (this is not a column that can be added to the view)

We have added a banner to **GOapply** that will appear when foundation staff are **impersonating** a **GOapply User**. This banner serves as a **reminder** that you should **log out** before impersonating another user, else you **risk data integrity on the Status Tracking record**.



New Feature: Organization Profile Change Requests

GOapply Organization Profile Change Requests – GOapply Administrators now can approve or reject proposed organization profile changes from applicants. This is an **opt-in** feature controlled by a **GOapply Setting**.

Applicant makes changes to Organization Profile (will not be able to change any fields set to “read only”) and submits for review.



Request will show up in the “Change Requests” table in akoyaGO. Can approve or deny changes.

akoyaGO with Accounting – Enhancements

New Send to Accounting Security Roles

- The Send to Accounting security role has been split into three new roles – akoyaGO Send to Accounting – Request Payments, akoyaGO Send to Accounting – Gift Payments, and akoyaGO Send to Accounting – Interfund Grants.
- These roles are required for Send to Accounting and Reversal/Adjustment functions.
- Users who currently have the “Send to Accounting” role will now be assigned all three roles. These can be adjusted by your admin if needed.

New Donor Opportunities Dashboard

- This includes the following:
- Chart: Donor/Prospect by Opportunity Type and Stage
 - View of "Potential Gifts" - Shows active Donor Opportunities where "Type" = "Gift"
 - View of Active Donor Opportunities - Gives ability to toggle between 5 views, one for each of the 5 Stages
 - Chart of Closed Donor Opportunities - Won vs. Canceled
 - View of Donor Opportunities that where the Target Closed Date has passed
 - View of Active Donor Opportunities with Overdue Follow up

Total Commitment now excludes Inactive gifts

The Total Commitment field on Donors and Prospects has been updated to exclude gifts with a status of "Inactive".

Business Central – Enhancements

Vendor Payment Method Code will now sync back between CRM Constituent record (Organization Details tab) and Business Central Vendor

Gift reversals: undoing a deposit in Business Central will now immediately revert the Payment Status on the Gift Payment to Received, rather than waiting for sync to run.

When voiding a non-check ledger payment (a payment posted without any Bank Payment Type assigned), the Payment Status in CRM will now update to "Received".



We fixed a bug that caused duplicate contacts to be created when someone registered with an email already linked to an existing contact in akoyaGO. This issue led to errors during email confirmation and blocked users from logging in.



Enhancements

- The “GOfund Move Documents” has been converted to code.
 - PDF of the Grant Recommendation and any additional documents uploaded by the fund holder can now be found under the “Documents” tab on Request
 - If the GOfund user chose to issue the grant on a ‘**standing/recurring basis**’ then documents will be shown on the “Documents” tab on the **Scheduled Distribution** record
 - **ADMIN ACTION ITEM:** Ensure “GOfund Move Documents” cloud flow is turned OFF in your environment
- GOfund Administrators can now enable/disable dedications in GOfund grant recommendations. This feature will be *enabled* by default. To disable, go to your GOfund settings. See the GOfund Admin Guide for more information.
- The Purpose field on grant/gift history views now truncates at about 50 words. Users will have the option to expand/collapse the purpose when it exceeds 50 words.



New Feature: Funding Opportunities

Funding Opportunities: Requests or Constituents to be displayed in Gofund with image and description

Feature “Funding Opportunities” on the Home page of GOfund

List Funding Opportunities as a tab in GOfund

Allow users to recommend a grant to a Funding Opportunity



New Feature: “Shopping Cart” for Grant Recommendations

Shopping cart experience allows user to:

- Save recommendations as drafts
 - Draft recommendations do NOT reduce spendable
- Submit a batch of recommendations at once or one at a time
 - Separate email templates are used for single versus batch submissions
 - Emails are sent via code, no longer via workflow. (Deprecate Obsolete Workflow: Grant Recommendation Acknowledgement)

Thank you!

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

The logo for akoyaGO, featuring the word "akoya" in a white, lowercase, sans-serif font, followed by "GO" in a bold, yellow, uppercase, sans-serif font. The "GO" is slightly offset to the right and has a subtle shadow effect.