# Transcript

June 4, 2025, 6:02PM

**Marni DuVal** 0:05

June 2025 product update webinar.

We're going to go over just the general agenda here, housekeeping.

Then we'll go through the Aqua go non accounting go apply a coagul with accounting business central and go fund and go donate bug fix so you'll notice today it's this release is very heavy on Go Fund features which is very exciting.

**Lori Boegershausen** 0:23

No problem.

**Marni DuVal** 0:38

We are trying to theme our releases a bit more here.

Really focusing on one product per release and then fixing the bugs. In addition to that, just to kind of make it easier to digest and we can really get those good enhancements out. If I could just give a gentle reminder that everyone mutes their microphone, that would be.

**Heather Lee** 1:01

And.

**Marni DuVal** 1:02

Wonderful.

Where can you find any release release related resources?

As always, go to go support for those. The upload of this recording will be available.

I'm gonna say by tomorrow morning.

Release notes for this June release are posted on Go support as of right now.

And then updated documentation for the new features will be coming out sometime next week.

So again, we're a week ahead.

Eight days to be exact, of when this actual release is going to go out. So you'll see everything that I'm going over here today in your database next Friday morning, Friday the 13th.
That's a battle, man, I promise.
It's just it was just like a really good day.
All right, general. Housekeeping, please keep your eye on the announcement section in GO support.
We utilize this to help you stay up to date on items between product updates and it's also where you're going to find information regarding hot fixes, so bugs that bug fixes that we have pushed out that we decided are too critical to wait for the next release.
Admins, you may also be receiving some emails from Microsoft that might talk about your extension not being compatible or rescheduled. An update to your environment.
If that extension says Akoyago, you don't need to do anything. Don't worry about it.
And rest assured, we are on top of those updates for those business central environments.
All right, hopping on over to enhancements here.
So for koiigo, this effects everyone.
I'm not going to do that thing where I repeat it again for the accounting clients.
So estimated grant pay date on request.
Will now default to the posting date of the corresponding payment, so this will happen upon approval of a pending request.
Like I said, estimated grant pay date will default.
You will still have the ability to manually change this date, so it's just gonna put a default value in there, so you have it change it to whatever you need it to be.
The institution type column, previously called Fields, has now been removed from the main constituent form.
Why, you may ask? This was required for fundweb, which as we all know is deprecated now.
We also just feel that this information is really duplicative.
Of what you see in the tax status field.
So you are more than welcome to continue using the institution type field if you want.
Two, if you find that valuable, however, it's no longer part of our best practice.

So we went ahead and removed it from the form.
All right. We've added four system views on the e-mail templates table.
So when you pop into tools and then e-mail templates, you'll see we kinda tried to categories categorize these out for you.
So you'll see Akoyago e-mail templates.
Those are the ones that relate to the CRM. Specifically, go apply e-mail templates, Gofund e-mail templates and go donate e-mail templates.
As a reminder, most of those have descriptions.
And then that will tell you how it's sent.
So if it's sent via process workflow or via code.
Who it's supposed to be from and who it's sent to.
The bank account and routing number columns have been removed from the constituent form in Akoyago so.
If you utilize these and you find they are no longer.
On your form come next Friday morning.
Use can certainly add them back.
We did this because it is against our recommendation to store banking information in CRM. We don't recommend doing that.
So we took away the fields that allow you to do that again if you need them, you can add them back to the form.
Any questions on these so far?
OK.
All right, moving forward.
You can now add handling notes to contact constituent and donor records, so this might sound familiar.
The handling notes these are currently on the fund record.
We've added them to these other core tables as well, so it is a free text field and you can put any pertinent information that you would want other users to see upon opening that record.
So if I put a handling note on a constituent form, it's also going to trickle down, if you will.
So it's going to show up on any request related to where that constituent is the applicant or the payee, any gifts or payments and I will just go ahead and kind of show you what this looks like here.
So right here I have my constituent.

Over an internal information, this is where you'll find the handling note.
So I typed some information in here.
And you'll see it pops up right away.
There as a banner.
That I have for this constituent you can see I have a banner up here.
I can expand that and it's actually giving me two handling notes for this because.
It's giving me one for the payee, which is my constituent and the other one for the applicant.
Any questions on that?
Wonderful.
Alright, we have also updated the next payment date rollup field on request payments to take into account the estimated pay date and payments with the status of received.
We did this so when a new payment is sent to accounting with a payment status of received and it has an estimated grant pay date in the future, that is considered in the next payment due field.
Any questions on that?

**Meghan Davignon** 7:59
I'll just add this was previously based on posting date, so if you're wondering how we changed it, we were looking to posting date date.
Now we're looking to estimated grant pay date.

**Marni DuVal** 8:13
And then for our neighbors to the north, for our Canadian clients, we have added a sanction status for Craig for Goverify.
So now when you run goverify.
If the organization is sanctioned, it's going to lead that constituent's tax status.
Blank. That's going to make it clear to you that you need to do further investigation in order to grant to that organization.
So in addition to that, we added a new field to capture that sanction status.
Any questions on that?

**Meghan Davignon** 8:51
Previously, we captured sanction on the GOVERIFY details on the sub record. It's now promoted to the main constituent record on the Goverify tab for easier visibility.

**Marni DuVal** 9:07
Alright.
And we made some updates to the approved deny button on request.
So.
We have several options here. Approved, full approve, recommended, so approve full would be approving the full requested amount.
Approve recommended would be approving the recommended amount.
Approved partial. If you choose this one, it's going to give you a little pop up backs where you enter in the amount that you want to approve.
And then approve requested scholarship, which is going to take.
The requested scholarships associated with that request.
And approve each of those.
Meghan am I missing something on that?

**Meghan Davignon** 9:59
You got it.
So as we've expanded the functionality around requested scholarships, this is going to allow you to more easily create payments in the scenario where you've approved multiple scholarships on the same request.
So we'll look to those requested scholarship records, identify how much was awarded for each, which is held on the requested scholarship record, and then it will create corresponding payments.
So we're approval, approve, recommended, approve partial.
Creates one payment, the approved requested scholarship will create one payment per scholarship.

**Marni DuVal** 10:37

Amanda, can you have a question on this?
You may need to unmute yourself.

**Meghan Davignon** 10:47
Mm hmm.

**Amanda Heubel** 10:50
I have a question about the approved request scholarship option.

**Meghan Davignon** 10:53
Mm hmm.

**Amanda Heubel** 10:55
We have some that have different amounts for that scholarship.
So if it's looking back, it's going to see a few different amounts.
Will there be a way to do that without doing like approved partial or approved recommended?

**Meghan Davignon** 11:11
So it's based on the awarded amount on the requested scholarship record.
So for each unique scholarship, it will look to that requested scholarship record to see how much you've awarded for each one.

**Amanda Heubel** 11:23
OK.
So you do have to put into in an amount before.
You can do approved requested scholarship.

**Meghan Davignon** 11:32
Correct. And based on that information, it will create the payments.

It'll also fill the total grant amount so that previously you'd have to manually tally that we're going to calculate it for you and fill it for you on the request.

**Amanda Heubel** 11:43
OK.
Thank you.

**Marni DuVal** 11:50
Alright. And then of course the deny button.
I think we can all make assumptions as to what that one's going to do.
An important note on this though. So entering data in original Grant now as we have been doing for quite some time, that's no longer going to automatically create a payment for the request.
So if this is something that you are used to doing and you want to continue doing, know that there will be no automated payments created. For that, you'd have to manually create a payment.
It will, however, still mark the the request as approved.
Any questions on that?
And as a result of this so.
The.
The payment that was created was created by a workflow so that workflow that created that is deprecated. If that is not already in those release notes.
I will make sure that it gets into those and they get updated so you know that that workflow needs to be turned off in your system. If it is not upon release day.

**Meghan Davignon** 13:05
So for any of our clients who prefer that payments not be auto created, the method to achieve that would be to enter a value in original grant directly and not use the approve button because approve button will always auto create payments moving forward.
Say something the Q&A.
This this change is for all requests, so regardless of the type of request, the approved button will create payments and the method it uses to create payments differs.

Whether it's a scholarship or a grant. And then the original grant field entering a value there will not auto create.
Payments, regardless of the type of request.
And the approved field can be used.
On both multiple records. So from a view you can approve multiple requests.
The only exception would be the approved partial I believe approved partial is for a single record because you're entering the value that is approved, so you can approve recommended, approve full, approve requested scholarship all from the list view approved partials reserved just to individual records.

**Marni DuVal** 14:25
Gary, do you have a question?

**Keri Jaynes** 14:29
Yes. So depending on the type of grant it is when we press the approve button, it doesn't create the payment right away.
We have that created once the. Let's see their phase two is submitted and then that generates the payment, creates the payment on that requirement is met.
So are you saying that that's going to be changing?

**Meghan Davignon** 14:53
You have customized the payment creation workflow.
You'll you probably need to make adjustments to it based on these changes and then our best practice would be not to use the approve button because that will immediately create the associated payments regardless, regardless of any configuration that you've done.
So instead of using the approve icon you we would counsel you to enter the original grant amount directly.

**Marni DuVal** 15:31
Any other questions on this?

**Meghan Davignon** 15:31

And Lisa just clarified.

We are still not sending payments to accounting without the user calling that action, so nothing is automatically sent to accounting. If you are using the accounting integration.

**Marni DuVal** 15:55

Wait, forge ahead here.

Go apply.

So the due date on the in progress view in go apply. So we're talking about the go apply UI with the applicant sees.

That is going to display the phase due date unless there is an override due date on that status tracking record.

In that case, it's going to show the override date so no longer need.

Or two separate columns on this.

It's going to be dynamic and smart enough to know what the actual due date for that particular status tracking record is.

**Meghan Davignon** 16:37

There is an action item though. If you have customized your in progress view, you may need to add the new due date field to your view and remove the individual due date fields that were previously utilized.

So if you've not customized the in progress view, this change will happen automatically.

But if you've made any changes to that view, you will likely need to exchange those fields for the new field just called due date.

And that is on the status tracking view called in progress.

**Marni DuVal** 17:12

All right. So previously a cloud flow, which 99% sure was called Add all pending request to review group that has been deprecated and replaced with a button called Add pending request.

So this is on the review group itself and how this is gonna work is when you input your opportunity and your phase, it's gonna take all of the status tracking.
Records where the status is submitted and that match the opportunity and the phase and assign it to that review group.
Umm.
For scholarships as well.
So there's a new look up on the review group called Scholarship.
And that is going to take all the requested scholarship records for the scholarship defined in the review group.
That have a status reason of opted in and add them to that review group.
Are there any questions on that?
I realize I fumble my words a bit, so please feel free to raise your hand if you want some clarity.

**Meghan Davignon** 18:27
I'll take a stab at a rephrase if that's OK.

**Marni DuVal** 18:30
Please do.

**Meghan Davignon** 18:31
So from the review group, you can automatically Add all relevant status tracking records using this button.
So it's gonna filter based on the opportunity in the phase you've selected for the review group. If you select A scholarship, it will also consider the requested scholarships associated with those requests.
So this will allow you to more easily create scholarship specific review groups as well as Add all of your pending requests to your review group.
Even if it's not scholarship related.
And this is called from the review group.

**Marni DuVal** 19:10
Alright.

Reviewers are now going to be able to see the score that they gave each application on the review group page.
So I understand previously the Sami, I miscommunicated this last time in the previous webinar, so that was showing the aggregate score for those reviewers. Now their individual score will be shown as well.
The aggregate score is still a column that can be added to the view. If you find that. That valuable to show the individual reviewer scores. That's only gonna happen if you enable this function.
So when you're on the review group, there is a there's an option to display reviewer score, and if you enable that, they'll be able to see their individual scores. Any questions on that?
All right.
We have added a banner to go apply that's gonna appear when foundation staff AKA.
A K.
A U are impersonating a go apply user.
I'll give you a little.
Hint of what this looks like.
So we've run into some issues where.
Impersonation is happening and then that tab is not closed.
We can do this.
Computer, I know you got this.
And when that happens, you can end up if you have two impersonation sessions going on at one time, you run the risk of corrupting the data on that status tracking record.
So in order to prevent that.

**Meghan Davignon** 20:54
Lisa asked a good question.
She said.
Why are there too impersonate buttons? So in our staging environment we had a previous button and some of our clients have experiences too.
Which was deprecated and replaced with a new button and we have not hid the deprecated button in our staging environment, which is why Marni was seeing 22

icons here. And if you see this in your environment, our support team can help you with that. Unfortunately when we.
Deprecate buttons. We can't automatically remove them from your forms at this time so.
A little nuance of how we deploy our solution.

**Marni DuVal** 21:31
OK. So you'll see now I'm signing in this banner.
That's specific to me.
Ignore that.
That's just telling me I'm in a staging environment, but right here, this big red one, you must log out of this session and close this window when you are done impersonating this user. Attempting to impersonate 2 users at the same time will cause data corruption.
So again, I'm not going to go back to a different group.
I user and try to impersonate.
Ate them. I'm gonna go over here.
I'm gonna log out.
I'm gonna close this tab.
Any questions on that?
All right.
So we have a new feature.
I'm going to go ahead and demo this for you, but give you a quick overview here.
Go apply organization profile change request.
So go apply administrators are now able to approve or reject proposed organization profile changes from applicants.
This is an opt in feature which is controlled within your go apply settings.
It is going to default to off because that is the existing behavior, right?
So if you want to enable this, you'll need to go to the go apply settings.
And turn this feature on.
So how this works is if an applicant goes in, makes changes to their org profile, they can go ahead and submit it for review.
Again, if you have things in your profile that are read only.
For example, tax ID, name of the organization, right?

They're not gonna be able to touch these fields.
They can't change them.
Those aren't an option.
So the request, once they submit it for review, that's gonna show up in our change request table.
So the same place you go to approve Gofund profile changes.
These will be labeled as such. I'll show you in a bit and you can choose to either approve or deny these changes.
So right here.
I am logged in as my organization.
I'm gonna make a couple changes here.
We updated our mission, so I'm gonna go ahead and change that.
And my phone number, as you might guess, is not full of ones and 234.
So I'm gonna change that as well.
All right.
And I can go ahead and click submit here.
Can we wait if anyone wants to play some elevator music while we wait?
Fine with me.
Yeah, I have it turned off.
That's embarrassing.
So normally what would happen when you're not me?
A new update your settings appropriately is. There's going to be a banner that displays over here.
It's a nice green banner and out-of-the-box I believe it says something along the lines of your changes have been submitted for review.
You will receive an e-mail once they are approved.
You can change this banner to say whatever you want to your user so that is adjustable within the go apply settings here.
So I am going to right here.
So this is where you're gonna enable it.
Enable organization profile change requests.
Here we have the header here and then the submission confirmation message.
So it says your changes have been submitted.
You can change that to whatever you want.
There another thing that this is going to do is it's going to lock down the

organization profile. While there is an active change request.
In place so.
Marni goes and makes a change request on something, and then Meghan from the same organization, goes in the next day and tries to change something on the org profile.
Profile. It's gonna tell them you already have an active change request in place.
No changes can be made until that is either approved or denied.
And again, that is you could customize the wording on that within the go apply settings.
So over here in my active change request. Apologies, I'm just gonna kind of.
Happen to one that I've already approved here.
So again, this is just like go fund.
You'll see it gives the name of the person doing it, which is the go apply user.
The form type, so if this is from gofund, it's going to say go fund.
This one is go by organization profile update regarding is going to be the applicant and then the change request description.
So in this one in particular, I had no data in Street 2.
And I added a three.
If there was previously data, it would show me the before and then the proposed change.
And then I can choose to either approve or deny that.
Any questions on this?

**Meghan Davignon** 27:39
Carrie asked a question.
I just wanted to say out loud this is dependent on your unique organization profile form.
So if you've customized the org profile, it's using whatever fields you've made available in that form, and that's where you would determine what data is read only.
So that's done in the form designer on the organization profile, which is found on your go apply settings record.

**Marni DuVal** 28:06
All right.

Any other questions?
Meghan, do you want to take it over?

**Meghan Davignon** 28:20
Yeah, I do. OK.
So now we're onto accounting.

**Marni DuVal** 28:21
All right.

**Meghan Davignon** 28:24
So you might remember in our last release we created a new security role called send to accounting and that is required in order to send any gift grants or interfund records to accounting and this next release we are breaking that out into three distinct roles, so one for.
Request payments, one for gift payments and one for interfund.
Grants will be automatically assigning these to your users, so if you are a user.
Who has sent to accounting privilege currently will be assigning the supplemental rose roles to your users automatically. At that point, you your administrators or whoever manages your security can selectively remove these roles and so this is in preparation. Right now your field level security, if you have any.
Applied still applies, but come our August update, we're no longer going to support field level security.
For sent into accounting privileges.
So we want you to utilize these out-of-the-box security roles.
So you'll want to go in, take an audit of the users who should have ability to send to accounting for the three different tables and make sure they have the appropriate security roles for that purpose.
Pause in case there's questions.
We are releasing a new donor opportunities dashboard, which is just meant to be helpful in your moves management and donor opportunity stewardship.
So we have many different views and charts which we think will be helpful in that process. But like any system dashboard, this can be copied to a personal dashboard

and personalized.
So just another out-of-the-box tool that we think might be helpful for your donor stewardship.
We have made a change to the total commitment field on donors, so previously this was not excluding inactive gifts but as inactivating.
Incorrect records as our best practice, we have updated the logic on total commitment to exclude those inactive gifts.
This is also going to trickle down to things that are based on the total commitment.
So if we inactivate a gift and there's something that's based on the total commitment, that information will be more accurate now, because the total commitment will be accurate excluding those now in active records.
So we've added some synchronization or enhanced some synchronization between akoyago and business central. So one thing that we've added is the vendor preferred payment method code now synchronizes between CRM and business central.
So it can be assigned in either place and viewed in either place.
This is going to be located on the organization details tab, which I'll show you in just a moment.
Also related to synchronization.
For gift reversals, previously, when you would undo a deposit, you would have to wait for the five minute rolling sync to update that status from deposited to received.
That will now be automatic.
So it should synchronize immediately when you undo a deposit so that you don't have to wait for that synchronization to complete after the five minute window.
So just to make gift reversals a little bit easier.
And then finally, for our folks who are doing payments where we're not assigning a bank payment type.
So this is often used when you make an electronic payment outside of business central.
Let's say you're communicating that directly with your bank.
You're not generating an EFT, not a file from business central. You might be leaving bank payment type blank in the payment journal.
And so the reversal process for these types of payments is different.
You do have to UN apply them in the vendor Ledger.
And then reverse them and when you were doing that, that was not changing the payment status from paid to received as it would for other payment voids.

So we've updated this now so that if you do take that action, the status will change from paid to received.
It is worth noting that our best practice has moved to always using a bank payment type. So for our electronic payments not generated from business central, we would recommend you post those as manual checks.
The reason for that is that the void technology and process for checks is much better than for our non non specific payment types.
You have the ability to use the in system void prompt and void to a date other than the original date, whereas currently if you reverse a payment where you left that payment type blank, your only option is to reverse to the original date or post a correcting ENT.
So.
A little shift in our best practices with the change in the reversals and adjustments.
Technology, but you can continue to use it with no payment method assigned if that is your preference.
Just know the reversal process is slightly different.
So let me just toggle over and show you this is our new donor opportunities dashboard.
So there's lot of fun stuff to see here, But what I wanted to show you actually was a constituent profile.
OK. So on the organization details, you're gonna find that payment method that I mentioned earlier.
So this is where we can say similar to the values or exact values we see in business central. This vendor prefers to be paid or this payee prefers to be paid by bank transfer or card or check.
This is gonna synchronize into their profile in business central.
You might also notice that this is where the banking information that we removed from the form previously resides.
So if you had that routing number account number on your form and we removed it, this is the section that we removed it from and we replaced it with the payment method.
Also, the vendor blocked status, so if you have a vendor who's inactive in CRM that blocks them in business central.
But a vendor can also be blocked for other reasons, so you can mark a vendor as blocked for payments by selecting a value here.

And then finally, you may have noticed the is vendor and is customer flags which were previously on the internal information tab have been promoted to organization details.
So since we are sort of actively utilizing these flags, we made them available on a a higher level tab than internal information, and since they relate to payment processing, we chose to put them here.
So if you are looking for is vendor or is customer, those will have moved from.
Internal information to organization details.
Barb asked if the payment methods will automatically be updated if they're NBC now, the answer is yes, they should be synchronizing from business central to CRM and you can change them in either place.

**Marni DuVal** 35:29
Come June 13th.

**Meghan Davignon** 35:31
On June 13th, yes. Sorry, all of this is as of next Friday.
OK.
So next on my list is godonate.
We have fixed a bug that was causing duplicate contacts to be created if a user attempted to register more than once using the same e-mail.
So sometimes this would happen like they would register and not realize that they needed to verify their e-mail, and when they couldn't log in, their reaction was. I'm gonna try to register again.
And the system was incorrectly creating duplicate, so that should no longer be a problem.
And that is our only item for go donate in this session.
So next on my list is go fund and this is a an exciting one.
So for go fund, we have updated the document processing tools, so previously gofund submissions for grant recommendations would show on the notes and attachments in the request unless you activated a flow called Go Fund move documents which would move them into your documents folder. We have codified this.
Process so that documents will always go to the documents folder now so that flow

has been deprecated.
And this is consistent with how we process documents for other requests.
So moving forward, you'll wanna look for your documents.
So the PDF of that recommendation, as well as any supporting materials that the donor might have uploaded, those will be in the request documents folder. So either on the documents tab or under the related documents area.
And if you have that flow activated, we recommend that you would turn it off.
Also, we've added an option for GO fund administrators to disable the new function for dedications on grant recommendations, so we're the user could say this grant is in memory or in honor of someone that's on by default, but you can now disable it in your gofund settings on.
The Grant recommendation tab.

**Marni DuVal** 37:34
I just wanna. I'm sorry, man.

**Meghan Davignon** 37:36
OK.

**Marni DuVal** 37:37
I'll pop in here quick too, on the the documents portion. I don't know if you touched on this, but if they if the fundholder issues the grant on a reoccurring basis, it's gonna show up in the scheduled distribution record on the documents in the scheduled distribution record, not.

**Meghan Davignon** 37:48
All right, missa.

**Marni DuVal** 37:56
The request so important distinction there.

**Meghan Davignon** 37:57

Thanks Marni.
Yeah, I failed to mention that.

**Marni DuVal** 37:59
Yeah.

**Meghan Davignon** 38:00
So when a user submits a schedule distribution or recurring grant through gofund, the documentation has always been stored with the schedule distribution.
So now those instead of being on the timeline, will be in the related documents on the schedule distribution.
So only for recurring grants.
OK. And then the purpose field, so on my gift and grant history, we can include the purpose field, which is often long text that now is set to a maximum height. So that if you have you know 2000 word purpose for a grant, it's not going to.
Take up half of your page. The user will see the first portion and then be able to click.
See more to see the full purpose.
So I'll show you what that looks like when we get into the live demo of gofund.
OK, a brand new feature that we are launching here in beta with this June release is called funding opportunities.
So you may have noticed in your akoyago database there's a table called funding opportunities.
It's located in the fund management area and approximately two of our clients utilize this area and most others say that's a neat idea, but we're not really using it.
So now we're giving you a reason to use it.
The funding opportunities are a place where you can feature.
A request is an existing request or just a constituent in your database, and you can display information about that request or organization in gofund.
So we can show an image and a brief description and then your go fund users have the ability if they are unable to recommend a grant to then recommend a grant from that profile.
So I'll show you in real time what this looks like.
Here. OK, so.
So I'm in my I'm gonna switch to my active funding opportunities.

We're gonna ignore and save this.
OK. On the fund management area, funding opportunities can be found here. And so these are just very brief records.
All they contain is a link to a requester constituent and then a few key pieces of information.
So the title, the description which is rich text and then an image to feature this opportunity. Then once it's formatted correctly you can publish it to gofund and you can choose it to be featured so.
When I log into Gofund as the user.
That's not my password.
OK, so once I'm logged in, depending on what's enabled on my home page, or if the home page just isn't enabled. If there are featured funding opportunities, they'll show on the home page.
So here I just see the image and the title and then if I want to see more information I can click learn more and then that will show the rich text description that we've seen in the prior screen.
So within akoyago CRM.
Now I am unable to recommend a grant.
Through my portal so I can click recommend a grant. But before I do I just wanted to highlight that on the home page, we're only gonna see featured funding opportunities.
You can also create non featured funding opportunities and those will show on the funding opportunities tab.
So I see my featured opportunities and then I see other funding opportunities.
These labels are customizable, so you can call them whatever you want.
Funding opportunities is the name of our.
Table. But if you wanted to call these like featured causes, promoted organizations, whatever you wanna label these, you can choose the label and that's in your gofund settings.
And you can also choose to disable the funding opportunities tab. So if you only want them just to display on the homepage, you can choose that or vice versa. You can only display them on the funding opportunities tab, so there's a lot of flexibility and where and when.
These are displayed.
All users will see them.

So regardless of their permissions, if you have this feature enabled, every gofund user will be able to see these.
They just may or may not have that recommend a grant option depending on their individual permissions, which is based on the connection in akoyago.
So these are shown to everyone. If you do want to target a specific fund.
So let's say I have.
I just want this one fund holder to consider this.
Proposal like maybe it went to a competitive round.
We decided not to fund it, but I think this fundholder would probably fund it if they knew about it.
You can select A fund on the opportunity and then that opportunity will only show to the selected fund.
So any users who have access to that fund.
And then I just want to illustrate how we create these so often.
I think these will be created from an existing request, so you would locate the request in your system.
Forgive my vague test data.
Here's my June regression testing grant.
You'll click on the related tab and choose funding opportunities.
And then we'll add a new funding opportunity for this request.
Automatically it's gonna link to that request, of course, but it will also pre fill the title and if there is a project description it will pre fill the description as well.
You of course can modify those things before you publish it, but you won't have to rekey them if the information is relevant from the request record.
The same is true if it's just for a constituent.
So maybe there's not an existing request and you just wanna feature an organization you can create.
An opportunity from related funding opportunities that's just gonna be linked to constituent no specific request.
And then once I save this opportunity, then I'll have the ability to upload an image and we would recommend that you do.
And then once everything looks good, we can publish an optionally feature.
OK, so once I do recommend a grant, I'm now the fundholder.
I see the featured opportunity.
I want to fund it.

I'm gonna click recommend a grant.
This is going to pre fill my recommend a grant form with the organization and you'll note I can't change it at this point. So if I want to recommend to someone else if I change my mind, I do need to leave the page.
It's also going to lock the grant type, which is the restriction, so the restricted purpose.
So if this request is for a restricted purpose, the donor at this point can't change the intended purpose of the distribution. If you have this field disabled in your gofund site, because this is optional, it will be hidden.
We won't even see it.
So from here they can make a grant of whatever value that's available to spend for them, as long as it meets your minimum requirement, and then all the rest of the fields will still apply here.
Gonna pause before I submit this just to look at the questions.
OK.
So we can restrict to displaying to specific funds. We talked about that.
So Heather asked.
So we create the request, whereas requests are usually created via the GO Fund user.
The idea behind linking this to a request is that you may have received a competitive grant application that you've decided not to fund, so that request will show as denied in your system.
But you can feature that request and then grant holders can make discretionary grant recommendations.
Those will come in as new requests.
So you'll still have the history of the competitive application that was declined and then the donor advised or the, you know, discretionary grants. Those new records will come in fresh, not directly linked to the declined or cancelled grant. That was the source for this information.
Let me know if that's not clear.
I'm happy to clarify further.
So Marni mentioned this in the chat.
This is a beta tool. We're continuing to develop it.
We covet your feedback, so please any additional functions that you would like to see from this tool or changes to the functionality. We definitely want to hear them.
Josh, you have a question?

**Josh Jaeger** 46:45

1st I have a comment.

Bravo, brilliant.

**Meghan Davignon** 46:47

I think, yeah.

**Josh Jaeger** 46:49

We're going to make use of this.

I can almost guarantee very very soon.

The other question that I had was relating to.

Fund so like if I wanted to restrict this to if I wanted to propose a funding opportunity to two different fund holders, but I just create two funding opportunities and then restrict those individually.

**Meghan Davignon** 47:16

Yes, currently that was how you would have to do that, correct?

Yeah. So the original intention of funding opportunities is that you were proposing them to individual funds and that it was a personal outreach.

**Josh Jaeger** 47:21

Perfect.

**Meghan Davignon** 47:28

So that is still supported in this feature. You can still create funding opportunities that are not published to gofund, or you can combine the functionality if you want to propose them via go fund.

**Josh Jaeger** 47:38

So then the only other question I have is when we get a positive response, is there a way for us to know that a recommended grant was as the result of seeing a funding opportunity displayed in Gofund?

**Meghan Davignon** 47:50
Yes, so once I submit my grant recommendation, it will populate on the funding opportunities. So we can see the grants that were made in response to this opportunity.

**Josh Jaeger** 47:59
Go on.
Amazing. You guys are awesome.

**Meghan Davignon** 48:05
Hey, thanks.
We appreciate your feedback positive and negative, but we like the positive a lot.
So this comes into the next new feature of GO Fund.
So funding opportunities, you do have to enable, you're gonna turn that feature on in your GO fund settings?
We are also releasing go fund shopping cart for grant recommendations and this is not an opt in.
This will be automatically applied to our client site, so you'll note or you may have noted.
At the bottom of my recommendation form, I now have two buttons I can submit now or I can submit later. So submit now is just has it worked before? If I'm just submitting a single recommendation, I can just go ahead and submit it and then I'll be done.
I get the confirmation e-mail right away if I choose submit later.
This is adding to a basket or a cart and so I have now these draft grant recommendations and I can get back to this by clicking the basket icon at any time.
So when a grant is in the basket, it is not reducing the available to spend for the fund.
This is considered a draft, but this basket is validating spendable based on everything in the basket.

So if I recommend another grant.
It's going to check the total recommendation value per fun, so if the user has.
Multiple funds that they have access to, it's going to create segments and unfortunately the user I chose to demo only has access to one fund, but it would break up the cart or the basket by fund and it's validating the spendable for each fund individually.
So they will not be able to overspend through this portal.
So I can from here I can send it individual recommendations or I can edit.
Existing drafts. I can also submit all and so again if there is the the sum total of what's in my basket. If it exceeds my available to spend, I will not be able to submit all. It's going to warn me that I've exceeded that spendable, so I as.
The user can log out.
I can go.
You know about my business and come back a week later and I can log back in and see my basket and what I started and then I can complete the process at that time.
In order to facilitate a confirmation e-mail for the basket, there's a new e-mail template in your system which you'll want to configure, which is for a batch submission.
So if they submit a single recommendation, they get the same e-mail that we're getting before. If they submit a batch recommendation. You can also customize that e-mail, but it's gonna include a grid of all of the recommendations they made in that one checkout.
So they'll get only one e-mail for the batch submission, not a series of emails for each grant included in that.
So Zach asked if you can see what they've got in the basket.
The answer is you can.
But we haven't put it on the site map because it's not meant to be managed by your internal staff.
Really, the only reason we want you in there at this point is for troubleshooting.
So there is a table for draft gofund recommendations.
It's not on your site map you can get to it.
Within the system, if you're savvy enough.
But I'm just going to ask you not to for now.
I'll since this product is in beta and we are just, we wanna see how it works without sort of messing with the cart and because you can impersonate the user, we don't

think you should need to modify the draft recommendations for any reason.
Anne, I see your notes about language, and let me tell you that we belaboured this point all staff.
I mean, so many conversations about should it be add to cart.
Should it be add to basket?
Should it be, say for later, we really struggled with this. So again we welcome your feedback. If there is an overwhelming response that we don't like the language, we will probably change it or make it customizable.
Part of the reason we had to choose was because of the icon, right?
So if we can't call it a cart, if it looks like a basket and vice versa.
So I'm happy to receive any feedback you had about the verbiage we've selected for this function, so please feel free to send it over either to me directly or through your account manager.

**Marni DuVal** 52:26
Again, I have to agree with Meghan on this.
My eye twitches if I just have to think about this language again, so please feedback as welcome.

**Meghan Davignon** 52:39
OK.
And so the emails for this are sent via code.
So again, if you were customizing using the workflow called Grant recommendation acknowledgement that is now obsolete, you should go ahead and deactivate that because these are triggered programmatically no longer via workflow in your system.
And I did just want to submit that because I would like to show you that it appears on the funding opportunity.
Once it's submitted. Oh, that's not the right one.
He submitted.
4.
To feed my neighbor's opportunity.
Does it feed my neighbors?
All right, now I can't remember.
Let me find my confirmation e-mail.

Well, no, I'm not sure.
But we should see it here.
I like the conversation I'm seeing about verbiage, but we'll definitely review these comments and discuss internally.
Did I miss any questions?

**Marni DuVal** 54:03
Yeah, there was a question that I've been vigorously researching.
But you just might know the answer to it.
So this is in regard.
To.
Hold on.
Let me go back.
Sorry, losing it, OK.
So for the payment information syncing between business Central and akoyago.
If they are different in each of the databases, which one will take precedence?

**Meghan Davignon** 54:44
It's the record that was most recently updated.

**Marni DuVal** 54:49
OK.

**Meghan Davignon** 54:50
So this shouldn't be an issue on launch, because we should be taking all the data from business central into CRM by default.

**Marni DuVal** 54:51
OK.

**Meghan Davignon** 54:59
Occasionally sync gets out of whack.

Usually not very commonly that we're seeing anymore, but it would be the record that's most recently updated would be the source of truth.
Did we miss any questions?
Feel free to unmute yourself if we did.
I'm scrolling the list.
Lavisa says sink only ever gets out of whack when you need to cut a check in the next 5 minutes.

**Marni DuVal** 55:46
Yeah.

**Meghan Davignon** 55:46
If that's not Murphy's law, I don't know what is.

**Marni DuVal** 55:49
Same with my settings and go apply right anytime I need to demo.
That's when they're outta wack.
Lisa mentioned. I feel like this has a deft material to be a support webinar. Can you clarify?
Are you speaking to shopping CART funding opportunities?
Anything else that we did discussed here today?

**Meghan Davignon** 56:20
I think what Marni's asking is, do you feel like you need a support webinar about any of the features we've discussed, or are you just complementing the robustness of our content, in which case we will say thank you.

**Marni DuVal** 56:31
She said.
All of the new GO fund features.

**Meghan Davignon** 56:34

OK.
Yes, I agree that there there could certainly be support webinars about these topics and we will communicate that to our support team as they're looking to schedule those out into the coming months.

**Marni DuVal** 56:39
So.

**Meghan Davignon** 56:50
But the documentation for these features will be available on go support if they're not already by the time the release is posted. So please look there for information and then our support team is trained and ready to support you with any questions you might have.

**Marni DuVal** 57:07
And I will kind of throw in there too as far as support webinars go, especially for like this beta for funding opportunities, right? We would likely want to hold that webinar after we have made these additional enhancements.
So it's all inclusive of the feature.
Unless Meghan disagrees with me, then we do whatever she says.

**Meghan Davignon** 57:27
Mm hmm.
Yeah, I think it's based on client feedback too, right?
So if we get a lot of support questions, we might decide a webinar is an effective way to get the word out.
So we'll, you know, just keep our pulse on the support team to see what happens.
Nebula asked about the next release.
You're correct.
There is no July release. Our next release will actually not be until the end of August.
It's currently scheduled for August 28th, and that is largely due to empowered.
So Amy's correct, we can hang out August 5th through 7th in Detroit, MI if you're not already registered, be there or be square.

We are intending to release bug fixes in the interim as they're identified though, so while we won't be releasing any new features.
Or enhancements during this period, we are keeping an eye on the bugs reported so that we you can continue to move forward in your business.
So you can expect some bugs to be hotfixed in the interim period.

**Marni DuVal** 58:30
Which again back to keep an eye on announcements.

**Meghan Davignon** 58:31
I will.
Yes.

**Marni DuVal** 58:35
That's where you're gonna see the information for the bug fixes.

**Meghan Davignon** 58:38
Good point.
All right. We're one minute past.
Thank you so much for attending everybody.
We appreciate your feedback and hope you are as excited about these updates as we are.

**Marni DuVal** 58:49
Thanks everyone.

**Marni DuVal** stopped transcription

## GENERAL UPDATES

- **Release Resources:** Release-related resources can be found on Go Support, including the recording of the webinar, release notes, and updated documentation for new features. The recording will be available by tomorrow morning, and the release notes are already posted. Updated documentation for new features will be available next week.
- **Release Timing:** The release is scheduled to go out next Friday morning, June 13th. Check Go Support for updates.
- **General Housekeeping:** Keep an eye on the announcement section in Go Support for updates between product releases, including hot fixes and critical bug fixes.
- **Announcement Section:** Monitor the announcement section in Go Support for updates between product releases. This section will provide information on hot fixes and critical bug fixes that are too urgent to wait for the next release.

## AKOYAGO ENHANCEMENTS

- **Estimated Grant Pay Date:** The estimated grant pay date on requests will now default to the posting date of the corresponding payment upon approval of a pending request, but users can still manually change this date.
- **Institution Type Column Removal:** The institution type column has been removed from the main constituent form as it was duplicative of the tax status field and no longer part of best practice.
- **Email Templates System Views:** Four system views have been added to the email templates table, categorizing them into Akoyago, Go Apply, Go Fund, and Go Donate email templates.
- **Bank Account and Routing Number Columns Removal:** The bank account and routing number columns have been removed from the constituent form in Akoyago as it is against their recommendation to store banking information in CRM.
- **Handling Notes:** Handling notes can now be added to contact, constituent, and donor records. These notes will appear on any related requests, gifts, or payments, providing pertinent information to other users upon opening the record.
    - **Note Visibility:** Handling notes appear as a banner on the constituent form, showing information for both the payee and the applicant. This feature ensures that important information is visible and easily accessible.
- **Next Payment Date Rollup Field Update:** The next payment date rollup field on request payments has been updated to take into account the estimated pay date and payments with the status of received.
- **Sanction Status for Canadian Clients:** A sanction status has been added for Canadian clients in GOverify, which will leave the constituent's tax status blank if the organization is sanctioned.

## GOAPPLY

- **Approve/Deny Button Updates:** Updates to the approve/deny button on requests include options for approving full, recommended, partial, or requested scholarships, and the removal of the workflow that automatically created payments.
- **Approval Options:** Updates to the approve/deny button on requests include approving the full requested amount, the recommended amount, a partial amount, or requested scholarships. Each option has specific functionalities, such as creating payments based on the awarded amount for scholarships.

    - **Workflow Removal:** The workflow that automatically created payments upon approval has been deprecated. Users who prefer not to have payments auto-created should enter the original grant amount directly instead of using the approve button.
    - **Customization Impact:** Users who have customized the payment creation workflow may need to make adjustments based on these changes. The approve button will immediately create associated payments, regardless of any configuration done.
- **GOapply Due Date Display:** The due date on the in-progress view in Go Apply will now display the phase due date unless there is an override due date on the status tracking record.
- **Add Pending Request Button:** The cloud flow for adding all pending requests to review groups has been deprecated and replaced with a button called Add Pending Request on the review group itself.
- **Reviewer Score Display:** Reviewers can now see the score they gave each application on the review group page if the display reviewer score option is enabled.
- **Impersonation Banner:** A new banner appears when foundation staff are impersonating a Go Apply user, reminding them to log out and close the window to prevent data corruption.
- **Organization Profile Change Request:** A new feature allows Go Apply administrators to approve or reject proposed organization profile changes from applicants, which is controlled within Go Apply settings.

## AKOYAGO WITH ACCOUNTING/BUSINESS CENTRAL

- **Send to Accounting Security Roles:** The send to accounting security role has been broken into three distinct roles for request payments, gift payments, and interfund grants, and will be automatically assigned to users.
- **Donor Opportunities Dashboard:** A new donor opportunities dashboard helps with moves management and donor opportunity stewardship.
- **Total Commitment Field Update:** The total commitment field on donors has been updated to exclude inactive gifts for more accurate information.
- **Synchronization Enhancements:** Enhancements to synchronization between akoyaGO and Business Central include the vendor preferred payment method code and immediate synchronization for gift reversals.

## GO DONATE

- **GOdonate Bug Fix:** A bug fix in Go Donate prevents duplicate contacts from being created if a user attempts to register more than once using the same email.

## GO FUND

- **GOfund Document Processing:** Go Fund submissions for grant recommendations will now always go to the documents folder, and the flow for moving documents has been deprecated.
- **Disable Dedications Option:** Go Fund administrators can now disable the function for dedications on grant recommendations in Go Fund settings.
- **Purpose Field Display:** The purpose field on the gift and grant history will now have a maximum height, with the option to click 'see more' for the full purpose.
- **Funding Opportunities:** A new funding opportunities feature in Go Fund allows users to feature requests or constituents and recommend grants from their profiles.
- **Go Fund Shopping Cart:** The new Go Fund shopping cart feature for grant recommendations allows users to submit multiple recommendations at once and receive a batch confirmation email.

## **NEXT RELEASE: :** THE NEXT RELEASE WILL BE AT THE END OF AUGUST (8.28.2025), WITH BUG FIXES BEING RELEASED IN THE INTERIM.

## FOLLOW-UP TASKS

**Workflow Deprecation:** Deactivate the workflow that created automated payments for original grants. **(Admins)**

**Review Group Button:** Replace the deprecated cloud flow with the new 'Add pending request' button on the review group. **(Admins)**

**Due Date Field Update:** Add the new due date field to the in-progress view and remove the individual due date fields if customized. **(Admins)**

**Security Roles Audit:** Audit users to ensure they have the appropriate security roles for sending request payments, gift payments, and interfund grants to accounting. **(Admins)**

**Funding Opportunities Feedback:** Provide feedback on the new funding opportunities feature to help with further development. **(All Clients)**

**Shopping Cart Feedback:** Send feedback regarding the verbiage used for the shopping cart feature in GO Fund. **(All Clients)**