

EMPOWERED

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BEST PRACTICES FOR LAUNCHING GOAPPLY CYCLES

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LEARNING OBJECTIVES

1. Importance of Testing Before Launch
2. Items to Check During Testing
3. Testing Other Phases
4. Third-Party Responses Testing
5. Reviewer Testing
6. Cleaning Up Test Records
7. Key Takeaways for Testing

IMPORTANCE OF TESTING BEFORE LAUNCH

Testing is a required step for any GOapply Opportunity launch

Ensures better applicant support

Verifies Opportunity functions as expected

Allows time for necessary fixes

Ensures smooth application experience

Best Practice:

Test your **entire** GOapply Opportunity from start to finish **before** publishing your first phase. This includes testing all phases and Reviewer elements. **Remember: Mid-cycle changes to published applications are not supported.**

STEP 1: REVIEW GOAPPLY SETTINGS

GOapply URL

- The link to share with applicants to access your grants portal

Foundation Contact

- Determines who the automatic GOapply emails come “from” unless designated otherwise.

Allowable Registration Type

- Determines the type of users that can register

Applicant Approval

- Determines how organization accounts are approved

Best Practice

Users set as the “Foundation Staff Contact” or “Internal Phase Contact” must have “Send on behalf” permissions enabled in akoyaGO

STEP 2: REVIEW GOAPPLY OPPORTUNITY

Max Submissions:

- Ensure it is set to more than 1 for multiple test applications

Application Type:

- Set the user type you are testing (individual or organization)

Publish Setting:

- Your application must be Published to test.

Best Practice:

- **Set your Opportunity to “Invitation Only = ‘Yes’” during testing:** This prevents the opportunity from being accessible to current GOapply Users.
- **Title slug:** complete this to generate a distinct link for accessing your opportunity.
 - For example: [https://goapply2.akoyago.com/\[subdomain\]/application/\[titleslug\]](https://goapply2.akoyago.com/[subdomain]/application/[titleslug])

STEP 2: REVIEW GOAPPLY OPPORTUNITY

Hero Image, Summary, Description:

- Visible to applicant on the Opportunity landing page

Guidelines:

- Link applicant sees on GOapply

Phase Contact:

- Contact the applicant sees on GOapply

Internal Phase Contact:

- When this contains data, submission emails will send from this user's email

Phases in Application tab:

- Shows a list of phases and phase order connected to this Opportunity

STEP 3: REVIEW GOAPPLY PHASE: KEY SETTINGS

Phase Due Date:

- Sets deadline for the applicant

Phase Type:

- Select the type most pertinent to the phase you are building (ex: LOI, Application, Final Report)

Advance to Next Phase Automatically:

- When enabled, the applicant will automatically be advanced to the next phase when they submit their current phase form. This will show up in the applicant's In Progress view in GOapply.

STEP 4: REGISTER A TEST ACCOUNT

Register your GOapply User

- If this is your first time using GOapply as an applicant, you will need to register an account to create the GOapply User record that you will test with.

Account Type

- Register as an organization if testing for organizational opportunities
- Register as an individual for scholarship opportunities

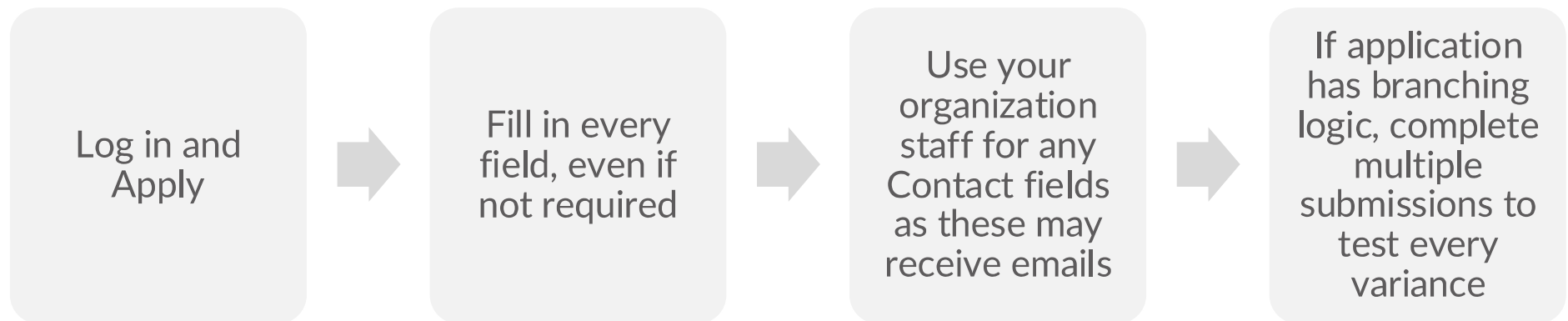
Registering as an Organization

- Use a fake Tax ID if testing for a non-existent organization
- Or, use your foundation's tax ID to connect to your existing constituent record.

Best Practice

Be aware of the records you create during testing to maintain a clean, accurate database. Make sure to deactivate your test records when you're done.

STEP 5: COMPLETE A GOapply SUBMISSION



Best Practice

Use a consistent naming convention to easily identify the test records.

RECORDS CREATED UPON SUBMISSION

- **GOapply Status Tracking Record**
 - Created each time a phase is submitted by an applicant
- **Request Record**
 - Created upon submission of Phase 1 of your Opportunity
- **Contact Record**
 - for Primary Contact (if it is a new email)
 - Note that a contact record is created only if the phase includes a panel mapped to the Request – Primary Contact.
- **Constituent Record**
 - Created for Applicant (if it is a new Tax ID)

Best Practice

Review all mapped panels before testing to ensure the correct records are created upon submission, especially for new contacts and constituents

ITEMS TO CHECK DURING TESTING

Mapping

- Did all fields on the Request (or related records) fill in as expected?
- Is anything mapped incorrectly?
- Is anything not mapped that should be?

Panels

- If your phase includes any Dynamic Panels, did these work as expected?
- Test with an existing Constituent/Contact and with a new one.

Branching Logic

- Did questions show/hide correctly?
- Do conditionally required fields work as expected?

ITEMS TO CHECK DURING TESTING

Email/other automated notifications

- Ensure verbiage in all automated communication is correct.
- Test using internal email recipients.
- Ensure email template formatting is satisfactory.
- Test any automated communications that include wait conditions (ex: Report Reminder email)

Printing in-progress and blank applications

- Review print blank applications to see all questions (regardless of branching logic).
- Ensure any fields that are meant to be hidden to the applicant are not shown on the PDF.

ITEMS TO CHECK DURING TESTING

Question Formatting

Does the Input Type, Input Format, or Input Mask need to be adjusted for any questions? Do dates appear correctly? Currency fields? Numbers? Email addresses/phone numbers? etc.

Character Counts

Do you need to adjust the character limits for any questions? Ensure to fill in the max number of characters in your test submissions.

Descriptions

Are your question descriptions clear from an applicant's perspective?

Logic

If your Phase includes any logic, test all possible branches (i.e. answer the questions both ways and ensure logic works as expected).

PDFs and Attachments

On the Documents section of the Request that is created, you will find a PDF and any uploaded attachments.

ITEMS TO CHECK DURING TESTING

Required Questions

Which questions should be marked Required? Are any questions marked that do not need to be Required?

Read-Only

Should any questions be marked Read-Only? Read only fields can be used as reference points to previously submitted phases.

Hidden Questions

Ensure any questions that should not be shown to the applicant are not showing up in the GOapply UI

Expression Questions

If your phase includes any questions set by default expression (i.e. they are totaling other questions, etc.), are these working as expected?

Best Practice: When collecting contact information, always require *Email Address*.

TESTING OTHER PHASES

Test Progression to Next Phases



Open the Request from Phase 1 and use the "Advance to next GOapply Phase" button.



Test each subsequent phase following the same standards

Best Practice

Follow the full progression through each phase to ensure workflows, visibility, and records function as expected before launch.

TESTING OTHER PHASES

The screenshot displays the akoyaGO software interface for a request record. The top navigation bar includes the akoyaGO logo, a search bar, and the word 'SANDBOX'. A warning message at the top states: "The Payee for this Request, Boys & Girls Clubs of Pasadena Foundation, is not a verified nonprofit or has not been verified in the past 30 days. Review the GVerify section on the payee's constituent record for more information." The main content area shows a request titled "022938" with a status of "Request (Accounting)". A dropdown menu for "GOapply Advance To" is open, showing options: "Final Report Phase", "Choose Phase", and "Next Phase". The interface also includes a sidebar with navigation options like "Home", "Recent", "Pinned", "Grants Management", "Dashboards", "Requests", "Funding Opportu...", "Payments and Re...", "Scholarships", "Interfund Grants", "Impact Investments", "Programs & Outcomes", "Program Budgets", "Outcomes", "CRM", "Constituents", and "Grants Managem...". The main content area is divided into sections for "Summary", "Payments & Requirements", "Documents", "Project", "Scholarship", "Process", "GOapply", "Funding Opportunities", "Outcomes", "Interests", and "Internal Informa...". The "Summary" section shows details like "Title: To beautify our parks", "Applicant: Boys & Girl...", "Primary Contact: Gail Sullivan", "Request Type: Grant", "Program: Environment", "Special Request Status: ---", and "Withdrawal Notes: ---". The "Timeline" section shows a recent event: "Created on: 10/27/2022 7:06 AM" with an email notification from "#BCO akoyaGO Integration" regarding an application submission confirmation. The right sidebar shows request details: "Request # 022938", "Request Status Approv", "Submission Accepted No", "Fiscal Year 2022", "Request Letter Type ---", "Tax ID 26-2854598", "Date Exemption Checked 12/16/2024", and "Tax Status ---".

THIRD-PARTY RESPONSES TESTING

Recommendation & Transcript Forms

Use a clear alias email address for testing. Ex: Claire+grantrecommendation@akoyago.com

Test the “Note in Email” functionality

Test uploading files to ensure they make it into the request record

Best Practice

Use a real, accessible email address when testing third-party responses to ensure you can fully review the experience and confirm successful delivery

REVIEWER TESTING

If utilizing akoyaGO's Reviewer feature, set up and test prior to publishing your application.

Set up a test Review Group

Set up your Review Group Application

Test in GOapply as the Reviewer

Ensure appropriate attachments for the request are showing up as expected in Reviewer UI

Ensure Review Responses come into akoyaGO as expected

Best Practice

Always ensure the submitted pdf in GOapply Reviewer is respecting the "hide from reviewer" elements you may have included in your Phase.

DEACTIVATING TEST RECORDS

Test Record Cleanup:

- Deactivate test records once testing is complete

Examples of Test Records Created:

- Request record
- GOapply Status Tracking records
- Contact/Constituent Records
- Payment/Requirement records etc.

Best Practice

Always remove test records promptly after you complete testing to keep your data clean and avoid confusion with live records

KEY TAKEAWAYS FOR TESTING



Check
GOapply
Settings

Check
opportunity
settings

Check
Phase
records

Register
a test
account

Submit test
application
and review
outputs

Test
Reviewer
elements
(if
applicable)

Test each
subsequent
phase

Clean
up test
records

Create Opportunity

Create all subsequent phases

Publish Opportunity

Register in GOapply as a new user

Complete all questions in Phase 1 and Submit

Review akoyaGO records created by submission for accuracy

Advance Request to next phase

Test next phase in GOapply

Repeat testing in GOapply for any additional phases

Create and configure reviewer elements

Register a reviewer and test Review Group Application in GOapply

Review Reviewer Responses and scoring in akoyaGO for accuracy

RESOURCES

[GOapply Admin Guide](#)

[Testing Best Practices](#)

THANK YOU

Presented by

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