

EMPOWERED

2025 | USER CONFERENCE | DETROIT, MI

OPTIMIZING AND MAINTAINING YOUR GOfund SITE

PRESENTED BY

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Addie Kelzer | Manager, Client Experience

akoyago

OBJECTIVES

- Review all GOfund Enhancements made in 2025
- Understand how to build a tailored Recommendation Form
- Inspiration from other users on how to maintain your GOfund Site

2025 ENHANCEMENTS

User Features

- Profile change requests
- Dedication and Comments fields in grant recommendations
- Shopping cart for multiple grant recommendations
- Display of Funding Opportunities
- Custom labels for Organization and Established Fund



Enable User Profile Change Requests Yes

Profile Header Text

Font settings: Segoe UI, size 11, bold, italic, underline, strikethrough, text color, background color, text alignment, list, link, unlink, insert link, insert image, table.

Profile Submission Confirmation Message

Profile Change Request Already Active Message

Resources: GOfund Admin Guide - <https://gosupport.akoyago.com/knowledgebase/article/KA-01080>
Change Requests: <https://gosupport.powerappsportals.com/knowledgebase/article/KA-01698/en-us>

Grant Type Restricted Label
Grant Type Restricted Label

Additional Options

Enable Comments * Yes

Require Comments * No

Comments Label

Allow File Upload * Yes

Require File Upload * No

File Upload Label

Enable Add Dedication Yes

Grantee / Recipient Options

Minimum Amount * \$250.00

Enable Interfund Recommendations Yes

Enable "Create New Organization" Yes

Customization For Organization Label

Enable IRS Tax Exempt Organization Search No

Customization For Established Fund Label

Enable CRA Charity Search No

Timing of Grant

Enable Timing of Grant * Yes

Timing of Grant Label

Enable Recurring * Yes

Timing of Grant Helper Text
grant timing rules

Grant Type / Restriction

Enable Designated Giving Yes

Require Grant Type * No

Grant Type Label

Grant Type Unrestricted Label

Grant Type Restricted Label



View Funds

Select Fund ▾

Contact

Accounting Testing User
66 Lighthouse Bay Hill
Chesapeake VA,
Phone: [214-375-7509](tel:214-375-7509)
Contact:
Accountingtesting@akoyago.com

Featured Ongoing Projects



Grant to 1voice Foundation
Inc.

Learn More

Other Ongoing Projects



(fem)me (fem)me

Learn More

Resources:

Funding Opportunities: <https://gosupport.powerappsportals.com/knowledgebase/article/KA-01776/en-us>

2025 ENHANCEMENTS

Foundation Staff Options

- **Scheduled Distributions**
 - No longer auto-create payments
- **Security Enhancements**
 - 2FA email logged on Contact record
- **GOfund Move Documents converted to code**
- **Display Settings Options for:**
 - Primary Fund Donor display
 - Interfund Recommendations
- **Grant Request Customization**
 - Enable/require options for:
 - Comments | Timing | Grant Type | File Upload



1000 - Unsaved
Gofund Settings

General Theme Home Page Fund Summary Fund Statement Recommend Grant Form

Enable Fund Statement * Yes Foundation User

GOfund URL

Sign In

Allow Sign Ins * No

Enable 2FA * Yes

Sign In Instructions Text

Angsana New 9 B I U

When Selected Yes,
2FA email sent to
verify the user are now
stored on Contact

2025 ENHANCEMENTS

User Interface Updates





- Alphabetical sorting of fund categories
- Removal of Fund Type from Fund Summary
- Truncated Purpose field with expand/collapse
- Sortable/searchable Grant and Gift history
- Revoked organizations hidden in Charity Search
- Additional org info shown in Recommend a Grant form
- Annual recurrence option added



Gift History

[Export to Excel](#)

Search table...

Formal Acknowledgement 	Formal Fund Name 	Amount 	Gift Type 
Cazin Charitable Fund	The Johnson Family Charitable Fund	\$200.00	Interfund
Hon. Marcus Aurelius	The Johnson Family Charitable Fund	\$500.00	Gift
Hon. Marcus Aurelius	The Johnson Family Charitable Fund	\$500.00	Gift

Organization Name *

Friends of the Boundary Waters



Address: 2550 University Ave. W

Website: <https://www.friends-bwca.org/>

City: Saint Paul

EIN/Tax ID: 36-3414821

State/Province: MN

Tax Status: Verified Nonprofit

Postal Code: 55114

Mission: The mission of the Friends of the Boundary Waters Wilderness is to protect, preserve and restore the wilderness character of the Boundary Waters Canoe Area Wilderness and Quetico-Superior ecosystem.

Has the organization's address changed from what is displayed above?

Yes

No

Proposed Address Update

Timing of grant

Issue this grant on a standing/recurring basis

grant timing rules

Frequency *

Annual

Annual

Semi-Annual

Quarterly

Monthly

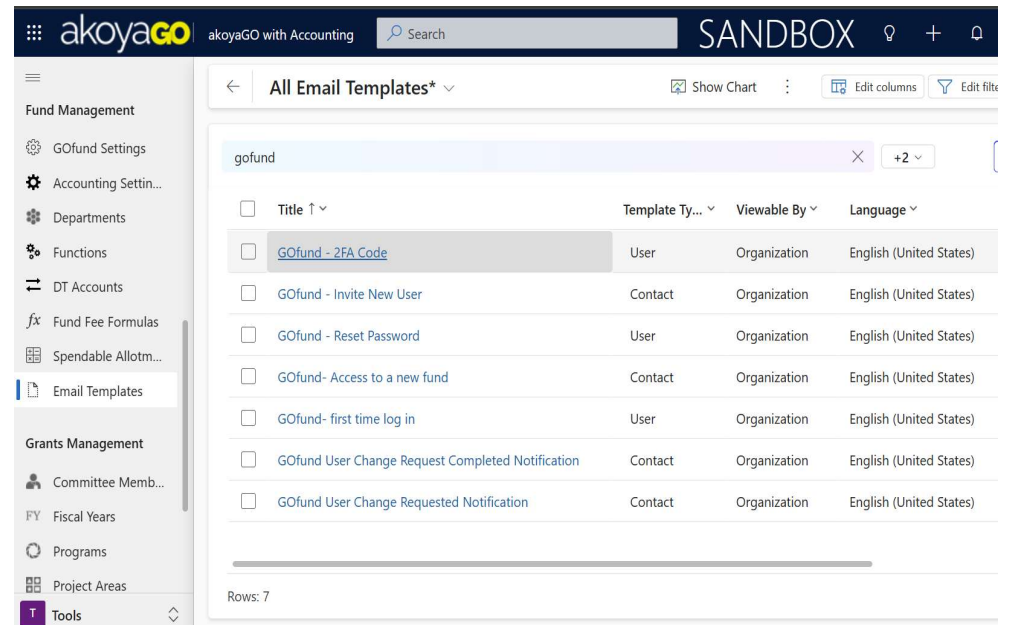
NEW! TAILORING THE REC FORM

The screenshot displays the 'ifu 1000 - Saved GOfund Settings' interface. The top navigation bar includes 'General', 'Theme', 'Home Page', 'Fund Summary', 'Fund Statement', 'Recommend Grant Fo...', and 'Grant History'. The 'Recommend Grant Fo...' tab is active, showing a 'Custom Messages' section with a 'Certification Text' field and a 'Grant Recommendation Form Editor' section. The 'Grant Recommendation Form Editor' section contains two buttons: 'Launch custom organization Form Editor' and 'Launch custom Interfund Form Editor'. The 'Launch custom organization Form Editor' button is highlighted with a blue border.

The 'Grant Recommendation Custom Organization Form' editor is shown in a separate window. It has a 'Designer' tab selected, along with 'Preview', 'Logic', and 'JSON Editor' tabs. The editor displays a form titled 'Testing Recommend a Grant Custom Form' with a description 'This is the description'. Below the description is a section titled 'First page of recommendation' with another description 'This is the description'. A 'Decision Date' field is visible, containing the placeholder text 'mm/dd/yyyy'. The editor includes a search bar, a list of form elements on the left, and a toolbar on the right with various editing tools.

PERSONALIZE EMAIL TEMPLATES

- Utilize out of the box templates
- Consider adding additional templates for recurring communications to fundholders
- Remember to be consistent across communication methods
- Consider setting up email signatures in akoyaGO for easier template management



The screenshot shows the akoyaGO interface with the 'All Email Templates' list. The table contains the following data:

<input type="checkbox"/>	Title	Template Ty...	Viewable By	Language
<input type="checkbox"/>	GOfund - 2FA Code	User	Organization	English (United States)
<input type="checkbox"/>	GOfund - Invite New User	Contact	Organization	English (United States)
<input type="checkbox"/>	GOfund - Reset Password	User	Organization	English (United States)
<input type="checkbox"/>	GOfund - Access to a new fund	Contact	Organization	English (United States)
<input type="checkbox"/>	GOfund - first time log in	User	Organization	English (United States)
<input type="checkbox"/>	GOfund User Change Request Completed Notification	Contact	Organization	English (United States)
<input type="checkbox"/>	GOfund User Change Requested Notification	Contact	Organization	English (United States)

Rows: 7

COMMUNICATIONS – EXAMPLE

Greetings <First Name>!

The new year is in full swing, and we at the X have some exciting news to share related to your online fund management.

In X, we will launch GOfund, a new platform developed by akoyaGO! GOfund will provide the same tools currently available plus much more.

In addition to new and improved site navigation, you will be able to see more information related to your fund, including a separate screen for gift history with donor addresses. You also will be able to renew grants previously made from your fund, streamlining the grant recommendation process.

You will receive an email from us in the next several days that includes a new link to the login page and instructions on setting up new login credentials. We also will include a user tip sheet that shows you step by step how to navigate different features of GOfund.

We value your commitment to strengthening communities, and we are here for you to make your experience convenient. That's what GOfund is about. We are excited to provide this tool to ensure that giving back is easy.

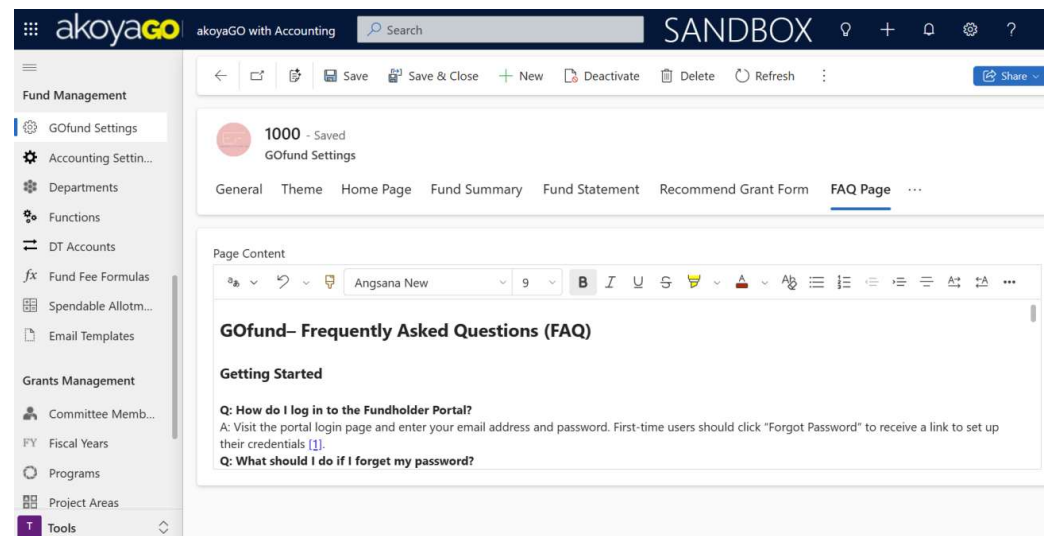
If you have questions, please feel free to reach out!

Your partners in philanthropy,

X Signature

DEVELOPING FAQs

- Remember to edit FAQs in GOfund Settings
- If questions are asked more than once, consider adding to FAQs
- Add links and resources in your FAQs tab



FAQ – EXAMPLE

GOfund Frequently Asked Questions

Q: Fund Statements

A: Investment activity and foundation administration fees may not be posted as of the date of the report. If you wish to direct a distribution that reduces your fund balance significantly, please contact the Foundation office to ensure there is a sufficient balance in your fund.

Q: Can I recommend a grant?

A: Yes! Click on Recommend a Grant at the top of the page. Simply fill in the form and click Submit. If you wish to request a distribution that reduces your fund balance significantly, please contact the Foundation office to ensure there is a sufficient balance in your fund.

Q: I want to make a grant to an organization, but they aren't listed. Should I use the Create New Organization?

A: No! If the organization you want to grant to is not listed, please contact the Foundation. They will conduct due diligence on the organization and add them to the list you can grant to.

Q: Can I see my fund's gift history?

A: Yes! Click on the Gift History link at the top of the page, set the filters to your liking, and click Apply Filters. The report can be exported and includes the addresses of the donors.

SHARING DOCUMENTS

- Options to share documents globally in GOfund and/or specific to each fund
- Global documents uploaded in GOfund Settings
- Fund Specific Documents uploaded to the fund record, documents section, *GOfund Documents* folder

The screenshot displays the akoyaGO software interface for a fund record. The top navigation bar includes 'akoyaGO with Accounting' and 'SANDBOX'. The left sidebar shows a navigation menu with 'Fund Management' expanded. The main content area shows the fund details for 'Sue and Samuel Thompson Environment Fund'. A red box highlights the fund ID '01499 - Saved' and the fund name. Another red box highlights the 'Documents' tab in the navigation menu. Below this, a 'Document Associated Grid' table is visible, with a red box highlighting a document entry named 'GOfund Documents'.

Name	Modified	Modified by	Location	Path
Fund Agreement - 5-5-2025_67682166...	5/5/2025 2:08 PM	SharePoint App	Document Location	01499_6CEC57168A29F01...
GOfund Documents	7/9/2025 1:39 AM	Chelsey Wagoner	Document Location	01499_6CEC57168A29F01...

DOCUMENTS – EXAMPLE

The screenshot displays the akoyaGO web application interface. The browser address bar shows "akoyaGO with Accounting" and "SANDBOX". The user is logged in as "Susan Thompson". The main content area is for fund "1000 - Saved" under "Gofund Settings". The "Documents" tab is active, showing a "Document Associated Grid" with one document: "Fund_Statement_Guide.pdf" modified on 7/9/2025 2:00 AM by Chelsey Wagoner. To the right, there are sections for "Foundation Staff Contact" (Training User, training@akoyago.com) and "Shared Documents" (Fund_Statement_Guide.pdf). Below that, "The Susan and Samuel Thompson Environment Fund Documents" section shows "annual_fund_statement_report.pdf". A footer note states: "For any questions regarding your fund agreement, be sure to contact the fund representative listed above." The copyright notice is "© Powered by akoyaGO - 2025.6.16.2 - Support Diagnostics".

akoyaGO with Accounting | Search | SANDBOX | Susan Thompson

Empowered Fund Summary Fund Statement Recommend a Grant Grant History Gift History Documents FAQ Give to another fund

Remember to register for our Annual fundholder event on September 1, 2025!

1000 - Saved
Gofund Settings

General Theme Home Page Fund Summary Documents

Show Chart + New Upload Document Location Open Location

Document Associated Grid

Documents on Default Site 1

Name	Modified	Modified by
Fund_Statement_Guide.pdf	7/9/2025 2:00 AM	Chelsey Wagoner

Foundation Staff Contact

Training User
Contact: training@akoyago.com

Shared Documents

Name	Download
Fund_Statement_Guide.pdf	Download

The Susan and Samuel Thompson Environment Fund Documents

Name	Download
annual_fund_statement_report.pdf	Download

For any questions regarding your fund agreement, be sure to contact the fund representative listed above.

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MEASURING ENGAGEMENT

- GOfund Usage Metrics Dashboard
- Views: Signed in/ Not registered
- GOfund logs

The screenshot displays the GOfund Usage Metrics Dashboard with four data tables. A red box highlights the 'GOfund Usage Metrics' dropdown menu at the top left. Red arrows point to the titles of the four tables: 'Recent Grant Recommendations', 'Active Change Requests', 'Recent Scheduled Distribution Recommendations', and 'Recent Interfund Recommendations'.

Request # (Regarding)	Grant Recommender (Regarding)	Grant Re...	Applican...	Requeste...	Date C...
023472	Catherine Harrison	claire.m...	Girl Scouts...		6/2/2025
023471	Catherine Harrison	claire.m...	Cat Depot		6/2/2025
023467	Catherine Harrison	claire.m...	1 Foundat...		6/2/2025
023410	Che' McMichael	eric.wor...	Homes For...		4/16/2025
023409	Che' McMichael	eric.wor...	Amazing S...		4/15/2025
023342	Liz Test	elizabeth.b...	Cat Depot		3/12/2025
023341	Liz Test	elizabeth.b...	Teach for ...		3/11/2025
023320	Catherine Harrison	claire.m...	All for the ...		1/29/2025

Name	Regarding	Created On	Form Type
savannaheddie-2@akoyago.com	1213 Charitable T...	7/8/2025 6:49 PM	GOApply Organization Pro...
claire.martin@akoyago.com	Animal Protectio...	7/8/2025 7:51 PM	GOApply Organization Pro...

Distribution (Regarding)	Grant Recommender (Regarding)	Payee (Regarding)	Amount (Regarding)	Date Creat...
0001014	claire.nyerhuis	1 Foundation Inc. ...	\$300.00	2/27/2025 10...
0001013	Chelsey Johnson	100 Black Men of Gr...	\$250.00	1/29/2025 6:4...
0001011		Accelerate & Arise F...	\$300.00	11/19/2024 7...
0001010		100 Black Men of Gr...	\$507.00	11/19/2024 3...
0001009		826 National	\$987.00	11/19/2024 3...
0001008		A Healthier You Inc.	\$560.00	11/19/2024 2...
0001007		Austin College	\$456.00	11/19/2024 2...
0001006		Boy Scouts of America	\$356.00	11/19/2024 2...

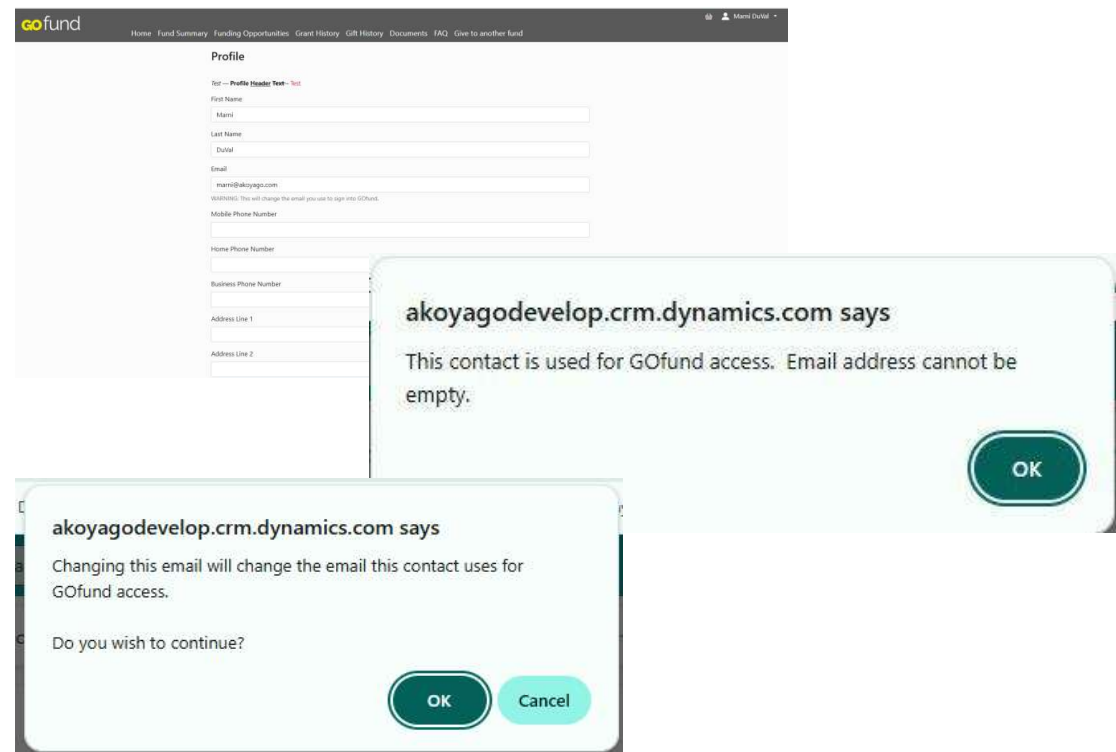
Interfund No (Regarding)	Payee (Regarding)	Grant Recommender (Regarding)	Amount (Regarding)	Date Creat...
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COMMON TROUBLESHOOTING


- **Changing a fundholder email address**
 - Change Request – User changes email address in GOfund UI by editing their profile. This changes their primary email address on their contact record in akoyaGO and it will update the username of the fundholder's GOfund login.
 - Foundation staff can also change email addresses for fundholders in akoyaGO CRM, if connected to an active *Donor Portal Access (GOfund)* connection, then an alert pop-up will appear on-screen

COMMON TROUBLESHOOTING

- Handling deceased records
 - Change Primary/Secondary Fund Contact (if necessary)
 - Add an end date on the connection(s) and deactivate connection
 - Deactivate contact record, mark deceased



USER EXAMPLES



🛒 👤 Lisa Bates

Foundation Staff Contact

Rebecca Gilliam
33 S 7th St
Richmond IN, 47374
Phone: 765-962-1638
Contact:
Rebecca@waynecountyfoundation.org
Website:
www.waynecountyfoundation.org

General Donor Advised Fund (00156)

Donate
Recommend a Grant
View Fund Statement

Fund Balance

\$11,719.33

Spendable* Balance

\$6,719.33

* This is the available amount to spend less any pending recommendations and payments in process.

Recent Grants Payments

GL Memo	Request Type	Amount	Payment Date	Purpose	Formal Fund Name
Wayne County Cardinal Greenway	Grant	\$100.00	6/4/2025	General Operating/Unrestricted	General Donor Advised Fund Repeat Grant
Western Wayne Dollars for Scholars	Grant	\$1,000.00	5/8/2025	Ted Olinger Scholarship - 2025	General Donor Advised Fund Repeat Grant
Golay Community Center	Grant	\$100.00	1/6/2025	General Operating/Unrestricted	General Donor Advised Fund Repeat Grant

[See Full Grant History](#)

Recent Contributions

Formal Acknowledgement	Amount	Posting Date	Formal Fund Name
Jeff Burkley	\$25.75	6/5/2025	General Donor Advised Fund
Anonymous	\$51.50	6/3/2025	General Donor Advised Fund
Lee Williams	\$103.00	6/3/2025	General Donor Advised Fund


[See Full Gift History](#)

USER EXAMPLES

[Home](#) [Fund Summary](#) [Fund Statement](#) [Recommend a Grant](#) ▾ [Grant History](#) [Gift History](#) [FAQ](#) [Give to another fund](#)

Please keep us informed if there are any changes to your awards committee. An authorized member of the awards committee may complete this [FORM](#). An "Awards Committee" member holds the duty of recommending grants and distributions from a fund and denotes the individuals authorized to access information about your fund, i.e., fund balance, distributions, gifts, etc.

For Designated, Agency & Supporting Organizations, you will need to download your fund statement to see your grant expenses.



Spartanburg County Foundation

View Funds
Converse Heights Neighborhood Association General... ▾

Foundation Staff Contact
Karen Nichols
Contact:
knichols@spcf.org

Make a Grant Recommendation
Support the cause

[to an Organization](#) [to an Established Fund](#)

Grant History
Your Impact

If you have questions about **gifts TO your fund**, contact Donate@spcf.org.
If you have questions about **grants made FROM your fund**, or about your **scholarship fund**, contact Accounting@spcf.org.
If you have **general questions about your fund**, contact Karen Nichols at knichols@spcf.org.

Spartanburg County Foundation
424 East Kennedy Street, Spartanburg, SC 29302
864.582.0138

ROUTINE MAINTENANCE

Suggested Frequency			
Monthly	Alert Banners	Email Templates & Signatures	
Quarterly	FAQs	Foundation Staff Contact & Fund Contact	GOfund Logs – Invitation Sent but no log-in
Annually	General Site Verbiage	Eligible GOfund Organizations list	Global and Fund Specific Documents

THANK YOU

Presented by

Chelsey Wagoner
Manager, Client Solutions

Addie Kelzer
Manager, Client Experience