AKOYAGO OCTOBER 2025 PRODUCT UPDATE – WEBINAR SUMMARY

GENERAL REMINDERS & ACCESS

- Product update webinar covers major enhancements; bug fixes are in release notes on GOsupport. 1:51
- Documentation and session recordings are available on GOsupport; check the Announcements section for urgent updates. 2:11
- Ignore recent Microsoft extension compatibility emails if they mention akoyaGO. 2:50

ENHANCEMENTS IN AKOYAGO

PRIMARY CONTACT DEACTIVATION NOTIFICATIONS

- When deactivating a contact who is a primary contact on constituents or funds, you now receive banner notifications listing all affected records.
- *Action*: After deactivation, review and update primary contacts as needed. 3:50

POPULATE REQUIREMENT DUE WORKFLOW TEMPLATE

- New workflow template auto-populates the requirement due date based on a date field (e.g., project end date) and an offset (e.g., 30 days after).

STEP-BY-STEP:

1. Copy the "Populate Requirement Due" workflow template.

2. Configure it to use your chosen date field and offset.

3. When creating a requirement, the due date is set automatically.

4. Reference release notes for detailed configuration steps. 5:18

MAILING LIST DUPLICATE PREVENTION

- System now prevents adding the same contact, donor, or constituent record to a mailing list more than once (based on record GUID, not email).
- *Action*: If you try to add a duplicate, you'll get a notification. Use the remove duplicates process for email-based deduplication. 14:01

COMMUNITY FORUM LINK

- Direct link to the akoyaGO community forum (Discourse) added under Resources in the site map. 6:39

CHILD CONSTITUENTS SUBGRID

- On the org details tab for a constituent, a subgrid now displays all child constituents (e.g., schools under a district). 7:15

GOAPPLY ENHANCEMENTS

DEPRECATED PANELS IN ADVANCED FORM BUILDER

- Interim and final report panels removed from toolbox for new forms (existing forms still supported). 8:24

DYNAMIC PANEL COPY/ADD REMOVED

- Copy and add to toolbox options removed from dynamic panels to prevent submission/mapping errors. 8:48

INVITE CONSTITUENT TO APPLY – IMPROVED

WHEN INVITING A CONSTITUENT TO APPLY:

1. Click "Invite to Apply" on the constituent record.

2. Select opportunity and phase.

3. System checks for existing Go Apply users under the constituent.

4. If found, all receive the invite; if not, the primary contact is made a Go Apply user and invited.

5. Different email templates are used depending on user status (constituent/contact, existing user). 9:34

SCHOLARSHIP AUTO MATCH PER OPPORTUNITY

- Auto match can now be enabled per opportunity, not just site-wide. 10:33

SCHOLARSHIP-SPECIFIC LETTERS OF RECOMMENDATION

- Recommendation panels added to scholarship form letters; students specify recommenders, and emails are sent upon submission. 11:20

SCHEDULED PUBLISH FOR OPPORTUNITIES

- You can now schedule the publish date/time for Go Apply opportunities.

STEP-BY-STEP:

1. Set up your opportunity.

2. Enter the desired publish date/time.

3. The opportunity goes live automatically at that time (uses local time zone). 11:44

SIMPLE FORM BUILDER FOR SCHOLARSHIPS

- Simple form builder now available for scholarship supplemental questions. 12:03

AKOYAGO WITH ACCOUNTING ENHANCEMENTS

CONCEPTS ENTITY IN NAVIGATION

- "Concepts" table now accessible in grants management for accounting clients; used for pre-grant ideas. 15:16

FORMAL FUND NAME AUTO-POPULATION

- If "Formal Fund Name" is left blank, it auto-fills with the internal fund name to ensure consistency in external portals. 16:15

MAILABLE FUND STATEMENTS

- New feature to generate, batch, and optionally save fund statements from CRM.

STEP-BY-STEP:

1. Go to Fund Management > Funds.

2. Select funds and click "Fund Statements."

3. Set reporting period, document name, and choose batch options (per fund or per recipient).

4. Optionally include cover/back templates and enable double-sided printing.

5. Choose whether to save statements to fund documents or GOfund documents.

6. Generate; retrieve PDFs from the mailing section.

7. Up to 1,000 funds per batch; repeat for larger sets.

8. Cover/back templates are set up as letter templates with limited merge fields. 25:59

BUSINESS CENTRAL ENHANCEMENTS

VENDOR BANK ACCOUNT FORM REORGANIZATION

- Required fields for EFT are now prioritized; non-essential fields are hidden under "Show More." 26:48

EFT SETUP VALIDATION

- Additional validation alerts you if vendor EFT setup is incomplete before export. 27:19

1099 REPORTING UPGRADE

- Microsoft's new 1099 reporting method implemented:
- 1099 data is now year-based, supporting historical reporting.
- Direct printing of 1099 forms is no longer supported; a new exportable report is provided for third-party printing.
- Electronic submission is now supported.
- Existing 2025 data will be converted automatically; no data loss.
- New 1099 fields and process will appear after the update; a knowledge article and webinar will be provided. 32:58

GOFUND ENHANCEMENTS

DASHBOARD UPDATES

- GOfund usage metrics dashboard renamed to "GOfund."
- Grant recommendation tiles now link directly to the actual request/interfund grant/scheduled distribution records.
- Change requests are now visible on the dashboard.
- New views added for recent GOfund grant recommendations. 36:00

FUND STATEMENT DEFAULT DATE RANGE

- New setting allows default fund statement date range to be set to fiscal year (based on accounting settings) instead of calendar year. 37:18

GRANT RECOMMENDATION NOTE FIELD

- Option to disable the recommendation note field on the out-of-the-box form. 37:32

GODONATE ENHANCEMENTS

TRANSACTION FORM REORGANIZATION

- Donor-provided contact info is now on the main tab.
- Recurring gift link and all dedication/purpose details for up to 6 contributions are visible.
- Related gifts and payments are now on a dedicated tab.
- ***CUSTOMIZATION WARNING: DO NOT CUSTOMIZE THE GODONATE TRANSACTION FORM OR SETTINGS RECORDS TO ENSURE YOU RECEIVE FUTURE UPDATES. 41:41***

OTHER KEY NOTES

CUSTOMIZATION GUIDANCE

- Avoid customizing forms in Tools, GOdonate transaction, and settings records; hide fields instead of removing them if needed. 46:28
- A list of forms not recommended for customization will be published in the future. 46:38

RELEASE TIMING

- Enhancements will be live after the next update; clear your browser cache to avoid errors. 47:15

BUG FIXES & Q4 FOCUS

- Q4 will focus on bug fixes and regression testing; major new features are scheduled for early 2026. 53:54

FAQS & TROUBLESHOOTING

- **Interim/Final Report Panels**: Existing forms with these panels will continue to work; new forms should not use them. 49:38
- **Deleting Requests**: ISV error when deleting requests will be fixed in the October update. 50:19
- **Funding Opportunities**: Currently only support external grants, not interfund grants. 50:35
- **GOfund Fund Statements**: Fiscal year and start date settings can be combined; start date supersedes fiscal year. 47:59

WHERE TO FIND MORE HELP

- Release notes and knowledge articles are on GOsupport.
- Community forum (Discourse) for product suggestions and feedback documentation.
- Announcements and updates will be posted in GOsupport when bugs are hot fixed.